PeopleSoft

PeopleSoft ELM 9.2: PeopleSoft Enterprise Learning Management

September 2023

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit https://docs.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft ELM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Getting Started With Enterprise Learning Management

Enterprise Learning Management Overview

Enterprise Learning Management is a pure internet-based solution that enables enterprises to deliver courses and content to learners—whether they are customers, partners, suppliers, or employees—from a variety of sources. With Enterprise Learning Management, companies can manage a blended learning environment, gain visibility and insight into company learning needs, and analyze learning effectiveness.

Enterprise Learning Management is designed for use with other PeopleSoft Enterprise applications using precertified integration with the PeopleSoft HCM 8.3 and above, as well as PeopleSoft Financials 8.4 and above. Integration with non-Enterprise financial and human resources products is also possible, due to open integration technology.

Enterprise Learning Management Business Processes

Enterprise Learning Management supports the following business processes:

- Managing financial integration and data.
- Managing person, organization, and financial learning-related data.
- Managing current and completed employee objectives.
- Managing learning resources, such as equipment, materials, and facilities.
- Creating a catalog of classes, including instructor-led, web-based, and blended learning.
- Defining supplemental learning so that learners receive credit for completing other forms of learning beyond catalogued classes.
- Managing curriculum programs and certification programs.
- Enrolling learners in classes and tracking enrollment status.
- Managing wait lists and learning requests.
- Grading and tracking attendance.
- Managing current and completed learning records.
- Scheduling, delivering, and tracking of live instructor lead training (ILT) through the web.

- (FRA) Managing French regulatory requirements for training.

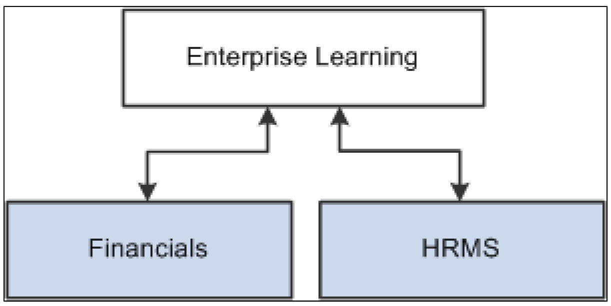
We discuss these business processes in the business process topics of this documentation.

The following video provides an overview of ELM updates:

https://youtu.be/zH7mC1f4ZrE

Enterprise Learning Management Integrations

This diagram illustrates how Enterprise Learning Management integrates with other Enterprise applications.



We discuss integration considerations in the implementation topics of this documentation.

Enterprise Learning Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding documentation.

Enterprise Learning Management also provides component interfaces to help you load data from the delivered Excel spreadsheet into selected Enterprise Learning Management setup tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists the components that have a setup component interface:

Component	***Component Interface***	***References***
LM_EQP_TBL	LM_EQP_TBL	See Defining Learning Resources.
LM_CUSTOMER_MAIN	LM_CUSTOMER_MAIN	See Defining Customers.
LM_OBJV_TBL	LM_OBJECTIVE_TBL	See Defining and Reviewing Objectives.
LM_MTRL_TBL	LM_MTRL_TBL	See Defining Learning Resources.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

Chapter 2

Defining Defaults

Defining Default Processing Rules and Options

To define default system settings and options, use the Install Defaults (LM_IN_DFLT_CMP) component and the Payment Methods (LM_SYS_PYT_MTHD_DF) component.

Pages Used to Define Default Processing Rules and Options

Page Name	***Definition Name***	***Usage***
Install Defaults – General Page	LM_IN_DFLT_GEN	Define general default values and rules at the installation level.
Install Defaults – Enrollment Page	LM_IN_DFLT_ENRLMT	Define default values and rules for enrollment at the installation level.
Install Defaults – Attendance Page	LM_IN_DFLT_ATTN	Select the attendance status values that you want the Auto Mark Class Completion process to assign to a learner's attendance record when it determines that the learner has attended, not attended, or initiated attendance in the learning component.
Install Defaults – Programs Page	LM_IN_DFLT_PRG	Define default rules for programs at the installation level.
Install Defaults – Counter Records Page	LM_CNTR_SETUP_PG	Reset the counter records for various IDs that you create throughout the Enterprise Learning Management system.
Install Defaults – Dashboard Page	LM_IN_DFLT_DASHBRD	Define default rules for the Learning Home dashboard at the installation level.
Install Defaults – Fluid Defaults Page	LM_IN_DFLT_CMP	Define default rules for the Fluid pages at the installation level.
Install Defaults – Notifications Page	LM_IN_NOTIF_DFLT	Define email configuration for Notifications page.
Payment Methods Page	LM_SYS_PYT_MTHD_DF	Define default payment methods for an organization.

Understanding Default Values

Defining default values provides a convenient way to assign consistent business rules to classes. Most entries that you make in the Install Defaults component become the default values for selected fields that are within the learning environment, course, delivery method, class, and program components. Default values for certain fields have a cascading effect. For example, the language that is selected on the Install Defaults page becomes the default language for the learning environment, which becomes the default language for the delivery method. In most cases, you can override the default value at another level. For example, you can override the default language at the learning environment level, the delivery method level, or both.

The following table shows where various install default values are used throughout the system:

Field Name	*Learning Environment*	*Course*	*Delivery Method*	*Class*	*Program*
Allow Completion from History	X		X	X	
Allow Cascading Expirations	X				
Allow Concurrent Enrollment	X				
Allow Nested Programs	X				
Currency Code	X		X	X	X
Default Requestor	X				
Display Certification Status on the Self Service Home Page	X				
Display Objectives on the Self Service Home Page	X				
Enable Learning Request	X	X			
Enable Waitlist	X		X	X	

Field Name	***Learning Environment***	***Course***	***Delivery Method***	***Class***	***Program***
Enforce Prerequisites	X			X	
Estimated Cost	X	X	X		
Hourly Cost	X		X		
Language Code	X		X	X	
Last Drop	X			X	
Last Drop Date = Start Date	X			X	
Last Enroll	X			X	
Last Enroll Date = Start Date	X			X	
Launchable from History	X		X	X	
Learning Period	X		X	X	
Learning Request Threshold	X	X			
Min Enroll Days (minimum enrollment days)	X			X	
Overbook	X			X	
Require eSignature on Updates	X				
Session Start Time	X			X*	
Session End Time	X			X*	
Time Zone	X			X*	

Field Name	***Learning Environment***	***Course***	***Delivery Method***	***Class***	***Program***
Waitlist Threshold	X		X	X	
Warning Period	X		X	X	

* Session components only.

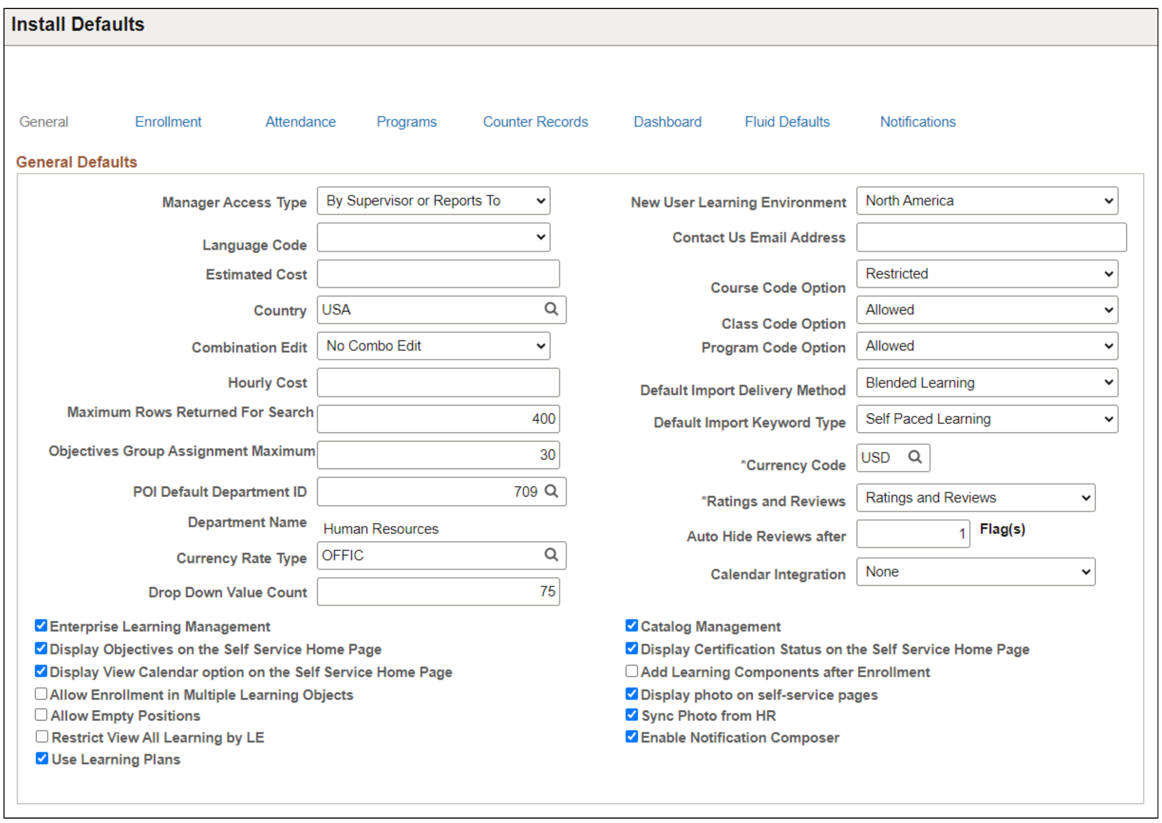
Install Defaults – General Page

Use the Install Defaults – General page (LM_IN_DFLT_GEN) to define general default values and rules at the installation level.

Navigation:

Set up ELM > **Install Defaults** > **General**

This example illustrates the fields and controls on the Install Defaults page.



<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Manager Access Type</td><td>
Select the management reporting structure that you want Enterprise Learning Management to recognize. The choice should be consistent with the management structure that the human resources system uses. The option that you select determines which internal learners a manager sees when accessing the manager self-service pages. It also determines who must approve enrollment when a class requires manager approval, and which manager receives enrollment notifications.
After you make a selection, you must also run the Load Manager Data (LM_MGRVWAE) process, through the Load Manager Data component, to update the manager view definition with the appropriate script based on the manager access type that you select here.
Options are:

Dept/Mgr (department manager): When you select this option, learners are listed on their department manager's self-service pages.

The system identifies the learner's department manager by checking the LM_PERSON_JOB table for the learner's department and then checking the PS_LM_ ORGANIZATION table for the manager ID.
Reports To: When you select this option, learners are listed on the self-service pages of the person that they report to, as identified in the Reports To field on the PS_ LM_PERSON_JOB table.
Sup/Rpts To (supervisor/reports to): When you select this option, learners are listed on their supervisor's self-service pages if a supervisor is identified in the Supervisor field on the PS_LM_PERSON_JOB table.

If no supervisor is named, learners are listed on the pages of the person that they report to, as identified in the Reports To field on the PS_LM_PERSON_JOB table.
Supervisor: When you select this option, learners are listed on their supervisor's self-service pages.

The system identifies the supervisor by checking the learner's PS_LM_PERSON_JOB table.

You can import the Reports To and Supervisor ID fields from PeopleSoft HCM by using Enterprise Integration Points (EIPs). If you use a third-party human resources system, and want to use an option other than Dept/Mgr, map the Reports To and Supervisor ID fields in the PS_LM_PERSON_JOB table to corresponding fields in the human resources system before importing your data.
See Understanding Person and Organization Data.
</td></tr>
</table>

Field or Control	Description
New User Learning Environment	The system assigns this value by default as the learning environment for all new departments that you import through the DEPT_SYNC or DEPT_FULLSYNC Enterprise Integration Points (EIPs). You can change the learning environment for departments on the Review Departments page. **Note:** To complete this field, you must first define learning environments. When completing the Install Defaults page for the first time, you can leave this field empty and return to this page in Update mode after you create learning environments. See Defining Learning Environments.
Language Code	Select the default language for classes. The system uses this value as the default value for learning environments and delivery methods of a class.
Contact Us Email Address	To enable Enterprise Learning Management users to send email inquiries about various aspects of the learning system to a central email address, enter the address here. Entering the address here causes the system to display the **Contact Us** link at the bottom of some self-service pages, including the enrollment pages and learning plan pages.
Estimated Cost	This field pertains to training plan budget reports. Enter the estimated cost, per learner, of delivering a class. When you generate a training plan that includes classes for which no estimated hourly amount is defined, the system can use this value to determine the forecasted cost for the class. You can override this value at the learning environment, course, and delivery method levels.
Course Code Option	Specify whether the same course code can be assigned to more than one course. Options are: • *Allowed:* Item codes do not need to be unique. • *Restricted:* Prevents administrators from assigning the same code to more than one course in the catalog. • *Restricted by LE* (restricted by learning environment): Prevents administrators from assigning the same code to more than one course within the same learning environment.
Country	Select the default country code that is to be used for addresses. PeopleSoft provides an Enterprise Integration Point (EIP) that you can use to synchronize country codes with the system of record (for example, PeopleSoft HCM). See Understanding Person and Organization EIPs.

Field or Control	*Description*
Class Code Option	Specify whether the same class code can be assigned to more than one class. Options are: • *Allowed:* Class codes do not need to be unique. • *Restricted:* Prevents administrators from assigning the same code to more than one class in the catalog. • *Restricted by LE* (restricted by learning environment): Prevents administrators from assigning the same code to more than one class within the same learning environment.
Combination Edit	Combination editing enables the system to validate Chartfield values that are dependent on each other. This field integrates with PeopleSoft Financials applications. Select *Synch Edit* to activate synchronization of the Enterprise Learning Management combination editing tables with PeopleSoft Financials combination editing tables. The system validates sets of Chartfield values against the Chartfield combination editing rules that are defined in PeopleSoft Financials whenever you save an Enterprise Learning Management page that has ChartFields. Select *None* if you do not want to synchronize the combination editing table. For example, perhaps you have a third-party financial system. See Setting Up Financial ChartField Data.
Program Code Option	Specify whether the same program code can be assigned to more than one program. Options are: • *Allowed:* Program codes do not need to be unique. • *Restricted:* Prevents administrators from assigning the same code to more than one program in the catalog. • *Restricted by LE* (restricted by learning environment): Prevents administrators from assigning the same code to more than one program within the same learning environment.
Hourly Cost	This field pertains to training plan budget reports. Enter the estimated hourly cost, per learner, of delivering a class. When you generate a training plan, the system can use this value to determine the forecasted cost for a class based on the hours defined for each of the class's components on the Recommended Duration page. You can override this value at the learning environment and delivery method levels.
Default Import Delivery Method	Select a default delivery method for classes created using class templates. See Defining Class Templates.

Field or Control	*Description*
Maximum Rows Returned for Search	Enter the maximum number of rows that the system returns during searches.
Default Import Keyword Type	Select a default keyword type for classes created using class templates. Keywords are an optional feature used to help learners and administrators find specific learning options in the learning catalog. See Defining Class Templates.
Objectives Group Assignment Maximum	Enter the maximum number of learners to which an administrator can assign the same learning objective through group objective assignment. During group objective assignment, if the group of learners exceeds the number that is set here, the system warns the administrator that the group exceeds the limit. The administrator then has the option to continue with the assignment for learners up to the maximum, switch to mass objective assignment, or refine the group criteria to achieve a group that is within the limits.
POI Default Department ID (person of interest default department ID)	Select the department to associate with internal learners who do not have a department ID in your HR application. (Typically, these are persons of interest without jobs.) The learning environment for these learners will be derived from the department specified here, instead of from the New User Learning Environment field. An internal learner's department controls chargeback information for enrollment fees. It may also determine who approves a learner's enrollment and registration requests. If a department is later assigned to the learner in the HR application, the department is uploaded into the learner's profile in Enterprise Learning Management. The learning environment is not automatically updated; you can change it on the learner's Job Data page, if necessary. If this field is cleared, and you try to import a learner without a department, the import validation process will generate an error, preventing creation of the learner profile. **Note:** To complete this field, you must first import departments from the HR application. When completing the Install Defaults page for the first time, you can leave this field empty and return to this page in Update mode after you import departments.

Field or Control	Description
Currency Rate Type	Select the market rate type to identify the exchange rate table to use for currency conversions. You can purchase currency conversion tables from third-party vendors. The system displays *OFFIC* as the default value. To illustrate the use of this field, suppose that you define a class with currency code of USD and assign the class an instructor who has a currency code of CAD. The system uses the table that you specify here to look up the exchange rate to apply to the instructor's fee.
Currency Code	Enter the default currency code that applies to the fees and costs that are associated with classes and programs. An administrator can override this value at the learning environment, delivery method, class, and program levels. PeopleSoft provides an Enterprise Integration Point (EIP) that you can use to synchronize currency codes with the system of record (for example, PeopleSoft HCM). See Understanding Person and Organization EIPs.
Drop Down Value Count	Enter the maximum number of values to display in some of the drop-down value lists in the system. Sort order is determined by ID. **Note:** This value applies only to certain drop down lists in the system, not all of them.
Ratings and Reviews	Select how you want to implement the review framework for your system. • *None:* Select to disable the ability of learners to enter ratings or reviews for learning items. • *Ratings Only:* Select to enable learners to enter ratings for learning items. • *Ratings and Reviews:* Select to enable learners to enter ratings and written reviews for learning items.
Auto Hide Reviews after	Enter the number of flags after which the system hides a review. Users can flag reviews on the Review Details Page.

Field or Control	*Description*
Calendar Integration	Select the type of calendar integration you want for your system. Values are: • *File:* Select to enable the system to send an iCalendar file as an attachment with notification emails that it sends to learners and instructors. The system attaches the file to the Enrollment Confirmation (LM_ENRLMT_CMPL_ILT template) notification email that it sends to learners upon successful enrollment in a class. It attaches the file to the Class Scheduled for Instructor (LM_ACT_INST_SCHED template) notification email when you assign a class to an instructor. • *None:* Select to disable calendar integration. • *Outlook:* This option is no longer supported.
Enterprise Learning Management	This check box controls the recognition of the installed Enterprise Learning Management product. *Do not* edit this check box. The installation process selects this check box automatically when you install the product. Be sure the setting for this check box is accurate before using your Enterprise Learning Management system. ***Warning!*** Once the install process selects this check box, the check box must remain selected. *Do not* deselect this check box or else you can lose functionality.
Catalog Management	Catalog Management relates to PeopleSoft Enterprise Components and is reserved for future use. This check box should be selected.
Display Objectives on the Self Service Home Page	Select to have objectives with a status of needed or in progress appear in a separate grid on the My Learning page. The My Learning Objectives grid lists each objective's name, proficiency, status, target completion date, who assigned the objective, and the associated class or program. An administrator can override this value at the learning environment level.
Display Certification Status on the Self Service Home Page	Select to have certification programs with a status of complete, expired, or warning display in a separate grid labeled My Certification Status on the self-service My Learning page. The system will display the program name, status, date, and a Recertify button. An administrator can override this value at the learning environment level.
Add Learning Components after Enrollment	Select to allow learning components to be added to classes after learners have already enrolled in it. You can add learning components to a class as long as its status is not *Completed* for any of the enrolled learners.

Field or Control	*Description*
Display View Calendar option on the Self Service Home Page	Select to display the View Calendar link at the top of the My Learning page.
Sync Photo from HR	Select to enable your ELM system to use the Employee Photo Integration subscription process to sync the ELM photos for your internal learners with their photos from your HCM environment. This check box is deselected by default. The initial synchronization of employee photos is done using the ELM Full Sync Integration Guided Process. For more information on setting up and running the guided process, see Understanding the ELM Full Sync Integration Guided Process If you deselect this check box, the system does not use the Employee Photo Integration subscription process to sync photos, even if the Employee Photo Integration and its associated service operations are active and configured. **Note:** The Employee Photo Integration affects only the photos of your internal learners. Photos for external learners are not affected by this integration.
Allow Enrollment in Multiple Learning Objects	Select to enable managers and administrators to enroll in multiple learning objects at a time.
Display photo on self-service pages	Select to display employee photos on self-service pages. If you deselect this check box, the system does not display employee photos on self-service pages.
Enable Notification Composer	Select to enable Enterprise Components Notification Composer. See product documentation for *Enterprise Components*, "Understanding Notification Composer".

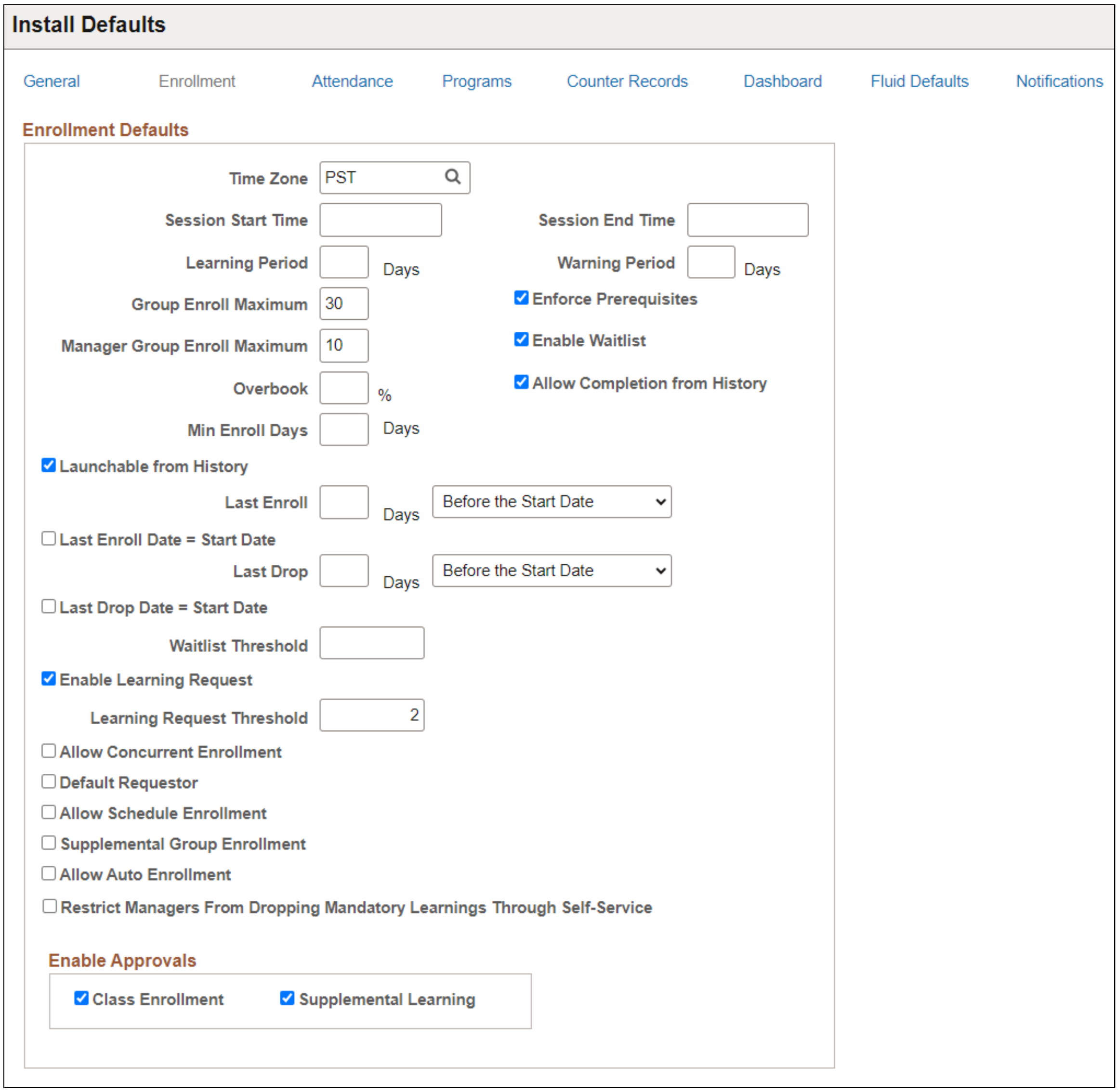
Install Defaults – Enrollment Page

Use the Install Defaults – Enrollment page (LM_IN_DFLT_ENRLMT) to define default values and rules for enrollment at the installation level.

Navigation:

Set up ELM > **Install Defaults** > **Enrollment**

This example illustrates the fields and controls on the Install Defaults – Enrollment page.



Field or Control	***Description***
Time Zone	This field applies to scheduled classes only. Select the default time zone for class scheduling. This is especially important for live webcast classes that learners from multiple time zones might attend. You can override this value at the learning environment level and, for sessions, at the class level.
Session Start Time and **Session End Time**	These fields apply to scheduled classes only. Enter the default start time and end time of classes. You can override this value at the learning environment level and, for sessions, at the class level.
Learning Period	Enter the number of days after the enrollment date that learners have to complete a class. You can override this value at the learning environment, delivery method, and class levels.

Field or Control	***Description***
Warning Period	Enter the number of days before the end of the learning period that you want the system to send an email notification to the learner expressing that the learning period is about to expire. You can override this value at the learning environment, delivery method, and class levels.
Group Enroll Maximum	Enter the maximum number of learners that an administrator can enroll in a class or register in a program through group enrollment and registration. During group enrollment and registration, if the group of learners exceeds the number that is set here, the system warns the administrator that the group exceeds the limit. The administrator then has the option to continue with the enrollment or registration for learners up to the maximum, switch to mass enrollment, or refine the group criteria to achieve a group that is within the limits.
Manager Group Enroll Maximum	Enter the maximum number of learners that a manager can enroll in a class or register in a program while enrolling or registering learners into multiple learning items at the same time. This field applies only when the Allow Enrollment in Multiple Learning Objects check box is selected on the Install Defaults – General Page. During enrollment and registration for multiple items, if the total number of enrollments and registrations exceeds the number that is set here, the system creates a mass enrollment request instead of processing the enrollment or registration online.
Enforce Prerequisites	Select if you want the enrollment process to obey class prerequisites. Deselect this check box to waive the prerequisites for all learners. Even if this check box is selected, the learning administrator can still waive prerequisites for individual learners. You can override this value at the learning environment and class levels.
Overbook	Enter the percentage above the maximum enrollment value for which you allow enrollment. The overbook value, multiplied by the maximum enrollment number, is the total number of enrollments that the system accepts before the waitlist status is assigned to a learner who tries to enroll in a class. You can override this value at the learning environment and class levels.
Enable Waitlist	Select if you want the system to accept waitlisted learners for a class when the maximum enrollment number is reached. If overbooking is permitted, the system does not waitlist learners until the overbook percentage is reached. You can override this value at the learning environment, delivery method, and class levels. To use the waitlist feature, you must also select the Enforce Enrollment Limit option for the class. Selecting the Enable Waitlist option alone does not cause waitlist creation.

Field or Control	*Description*
Min Enroll Days (minimum enrollment days)	Enter the number of days before a class start date that you want the minimum enrollment notification sent to the enrollment administrator and class owner to alert them that the minimum enrollment is not reached. the Min Enrollment Notification Application Engine process (LM_ACT_MINEN) performs this notification. This notification gives the class administrator and owner the opportunity to cancel a specific class because of low enrollment. You can override this value at the learning environment and class levels. See Sending Class Notifications.
Launchable from History	Select if you want the links associated with web-based or test learning components to be launchable from the learner's My Learning page after the class achieves a completion status of *Completed* or *Not Completed.* You can override this value at the learning environment, delivery method, and class levels. **Note:** You must select this check box if you select **Allow Completion from History.**
Allow Completion from History	Select if you want learners to be able to complete classes that have web-based or test learning components after the class achieves a completion status of Completed or Not Completed. For example, if a learner does not pass or complete a class the first time through he or she can return later to try to complete it from the My Learning page. If the **Launchable from History** check box is selected and this check box is cleared, then learners can launch the content but their progress will not be updated and no changes will be made to the class's completion or passing status. You can override this value at the learning environment, delivery method, and class levels. **Note:** If you select this check box, be sure to also select the **Launchable from History** check box.
Last Enroll (last enrollment)	Enter the number of days *Before* or *After* a class start date to represent the last day that enrollment is permitted. You can override this value at the learning environment and class levels.
Last Enroll Date = Start Date	Select if you want the last day that learners can enroll in a class to equal the class start date. You can override this value at the learning environment and class levels.

Field or Control	***Description***
Last Drop	Enter the number of days *Before the Start Date* or *After the Enrollment Date* that a learner can drop a class without paying the drop fee. Alternatively, you can select the *Last Drop Date = Start Date* check box. You can override this value at the learning environment and class levels.
Last Drop Date = Start Date	Select if you want the last day that learners can drop a class without having to pay a drop fee to equal the class start date. You can override this value at the learning environment and class levels.
Waitlist Threshold	Enter the number of waitlisted learners that will trigger a notification to the administrator. You can override this value at the learning environment, delivery method, and class levels.
Enable Learning Request	Indicate whether requests for new learning can be made. You can override this value at the learning environment and course levels.
Learning Request Threshold	Enter the number of learning requests for a particular course that will trigger a notification to the administrator. You can override this value at the learning environment and course levels.
Allow Concurrent Enrollment	If selected and the enforce prerequisites feature is activated for a class, learners who do not meet a class's required prerequisites at the time of enrollment, can proceed with the enrollment process, provided they are currently enrolled in the prerequisites. You can override this value at the learning environment level.
Default Requestor	Select this field to prevent the Select Requester page from displaying when an administrator uses the group or mass enrollment feature. The system assumes that the administrator is the requester. You can override this value at the learning environment level.
Allow Schedule Enrollment	Select to enable the system to automatically enroll learners in planned and waitlisted learning items when those learning items become active and available. To determine whether a learner is eligible to be enrolled automatically in a class, the system references the learner's preferred language and training region. For more information, see the documentation for the Learner Preferences Page.
Supplemental Group Enrollment	Select to enable administrators and managers to search for and select multiple learners when adding supplemental learning.

Field or Control	***Description***
Allow Auto Enrollment	Select to enable the system to automatically enroll learners in learning items due to HCM status or job changes. For more information on setting up this automatic enrollment, see Understanding Automatic Enrollment Due to HCM Status and Job Changes.
Restrict Managers From Dropping Mandatory Learnings Through Self-Service	Select to restrict managers from dropping mandatory learnings assigned to learners by administrators.
Allow Empty Positions	Select this check box to enable your ELM system to allow for empty positions in the management hierarchy. When this check box is selected and learners report to an empty manager position, the system replaces the learners' manager with the next manager up in the position hierarchy. This change to the learners' data occurs when job data is imported from HCM through the WORKFORCE_SYNC and WORKFORCE_ FULLSYNC services.
Restrict View All Learning by LE (restrict View All Learning by learning environment)	Select to restrict what displays on the Learner View Page of the View All Learning component to learning that belongs to the administrator's current learning environment.

Enable Approvals

Select to enable approvals for **Class Enrollments** or **Supplemental Learning.**

Note: Selecting these does not indicate that approvals are required for enrollments or supplemental learning. It only indicates that the approval functionality is available.

Related Links

Understanding the Approval Framework

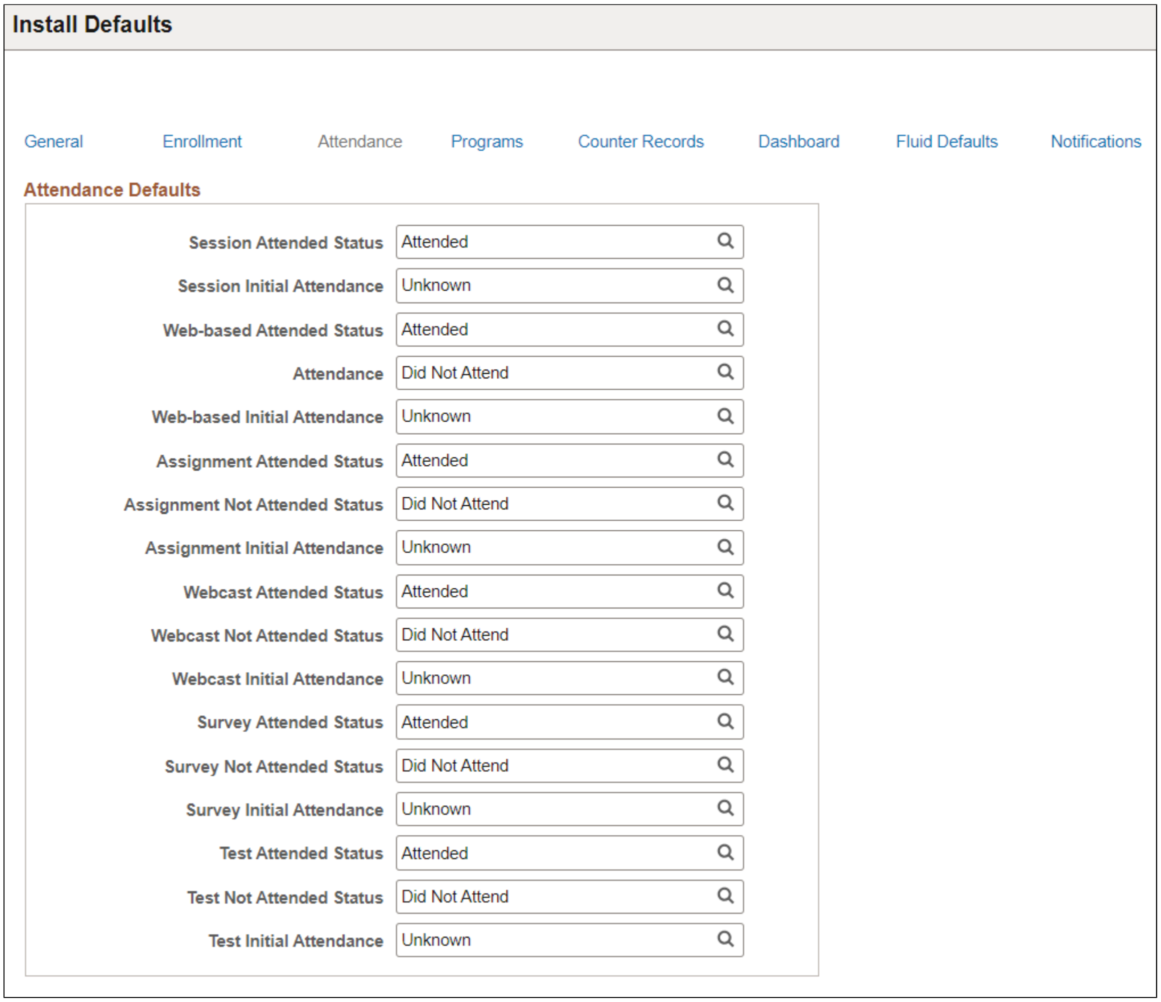
Install Defaults – Attendance Page

Use the Install Defaults – Attendance page (LM_IN_DFLT_ATTN) to select the attendance status values that you want the Auto Mark Class Completion process to assign to a learner's attendance record when it determines that the learner has attended, not attended, or initiated attendance in the learning component.

Navigation:

Set up ELM > **Install Defaults** > **Attendance**

This example illustrates the fields and controls on the Install Defaults – Attendance page.



For each type of learning component, select the attendance status values that you want the Auto Mark Class Completion process to assign to a learner's attendance record when the process determines that the learner has attended, not attended, or initiated attendance in the learning component. The attendance values that you select are based on the values that you define on the Attendance Schemes page. For an attendance scheme, you can create multiple labels for each of these three core attendance statuses—attended, did not attend, and unknown—and you can give each one a label that specifically meets the needs of your organization's learning environment for a given learning component. When you run the Auto Mark Class Completion process, the engine uses the values that you set on the Install Defaults - Attendance page to mark attendance for learners.

For all learning component types but session, the Auto Mark Class Completion process can track initial attendance. Therefore, you can define the initial attendance status for these component types on this page. For sessions, however, instructors track attendance and enter the data into the system. To save instructors time, the Auto Mark Class Completion process automatically marks all learners as attended for sessions. Instructors can then mark learners as not attended.

Related Links

Marking Attendance and Passing Statuses Automatically
Modifying Passing, Grading, and Attendance Schemes

Understanding the Learning Component Completion Engine

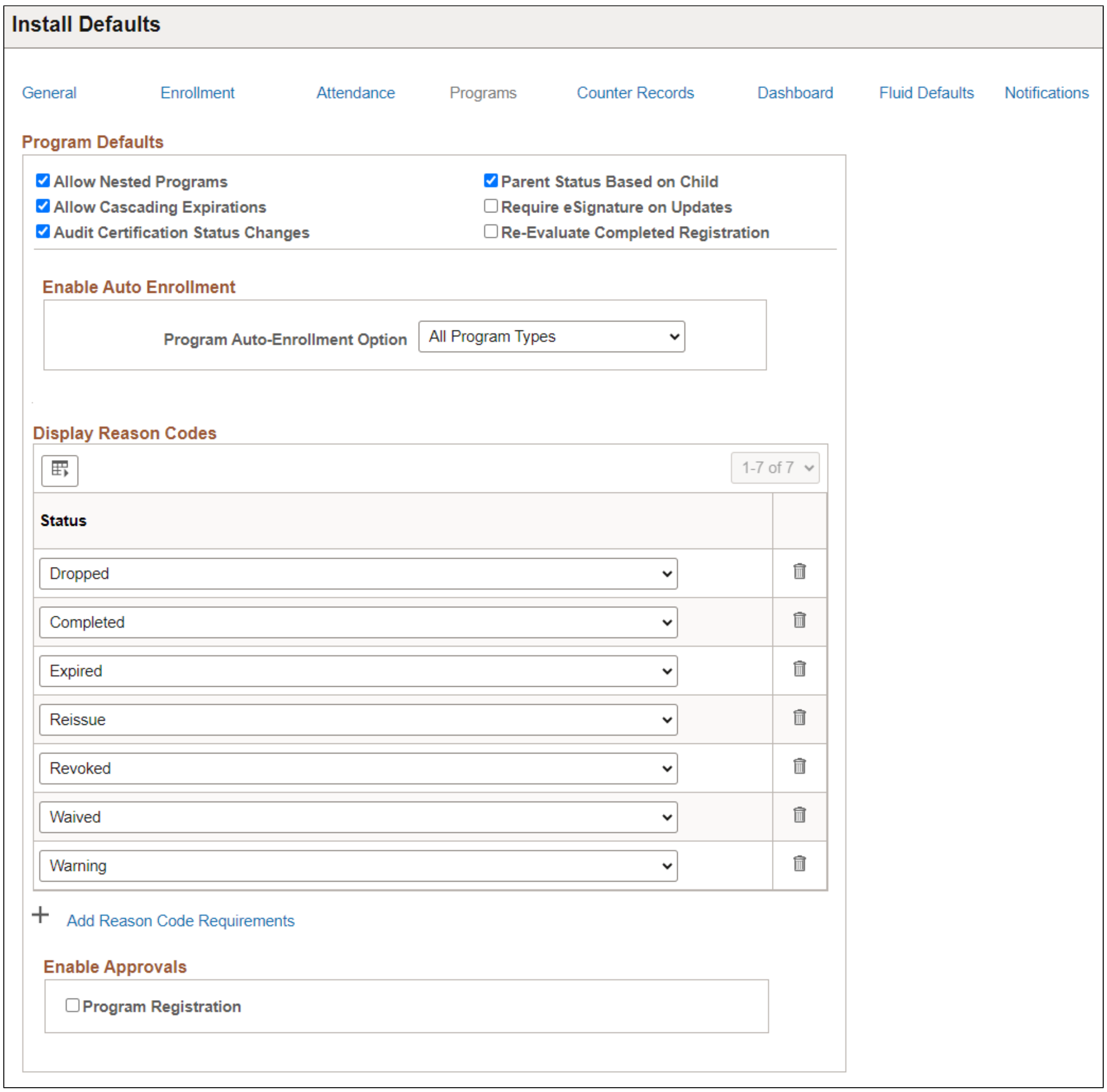
Install Defaults – Programs Page

Use the Install Defaults – Programs page (LM_IN_DFLT_PRG) to define default rules for programs at the installation level.

Navigation:

Set up ELM > **Install Defaults** > **Programs**

This example illustrates the fields and controls on the Install Defaults – Programs page.



Program Defaults

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Allow Nested Programs</td><td>Select to enable the inclusion of programs within other programs. This option can be overridden for a particular learning environment on the Learning Environment - Defaults page.</td></tr>
<tr><td>Parent Status Based on Child</td><td>Select to have the status of parent programs be based on the status of child programs. For example, if you select this check box and a child program expires, the parent program also expires.

If you deselect this check box, the status of parent program is not based on the status of child programs. With this check box deselected, the system sets the status of parent programs as follows:

• If one or more child programs has a status of Expired, the system sets the status of the parent program to Not Completed.

• If one or more child classes has a status of Enrolled, the system sets the status of the parent program to In-Progress.

• If one or more child programs has a status of Revoked, the system sets the status of the parent program to Revoked.

Note: This check box is available only if you select the Allow Nested Programs check box. You can override this option at the program level on the Maintain Programs - Details page.</td></tr>
<tr><td>Allow Cascading Expirations</td><td>Select to permit administrators to define different expiration rules for each section of courses within a certification program. If this check box is cleared, administrators can define only one set of expiration rules for an entire program. This option can be overridden for a particular learning environment on the Learning Environment - Defaults page.</td></tr>
</table>

Field or Control	*Description*
Audit Certification Status Changes	This feature enables you to track changes to a learner's program certification status. Administrators can produce the Certification Compliance (LMREGAUD) report, which lists each status change along with the learner's name, the date the status was changed, and the name of the person who updated the status. If you deselect the check box, the system will not store audit information for status changes. This option is selected by default.
Require eSignature on Updates	Select to enable administrators to activate the eSignature sign-off feature for a program. When eSignature is activated, administrators must enter their password when manually updating a learner's program status. This option can be overridden for a particular learning environment on the Learning Environment - Defaults page.
Re-Evaluate Completed Registration	If you select this check box, the Send New Program Updates Notification (LM_CERT_UPD) process checks completed programs to see if the requirements have changed. If an administrator added one or more requirements for a program, the process changes the status of that program from *Completed* to *Warning* for learners who have already completed the program. For more information on program notifications, see Sending Program Notifications.

Enable Auto Enrollment

Field or Control	***Description***
Program Auto-Enrollment Option	Select a value to specify how your system handles automatic enrollment during program registrations. Values are: • *All Program Types:* If you select this value, both certification and curriculum registration triggers automatic enrollment in the classes associated with the programs. **Note:** Automatic enrollment is triggered only into the first class (i.e. the class with the earliest start date) for each course associated with the program. Once the seats are filled in this class, learners are no longer auto enrolled, not even into other classes (if any) for that course. In addition, the Enable Auto Enrollment check box appears on the Maintain Programs - Details page for both certification and curriculum programs. • *Certifications Only:* If you select this value, only certification registration triggers automatic enrollment in the classes associated with the programs. In addition the Enable Auto Enrollment check box appears on the Maintain Programs - Details page for certification programs only. • *Curriculum Only:* If you select this value, only curriculum registration triggers automatic enrollment in the classes associated with the programs. In addition the Enable Auto Enrollment check box appears on the Maintain Programs - Details page for curriculum programs only. • *None:* If you select this value, automatic enrollment during program registration is disabled. In addition, the Enable Auto Enrollment check box does not appear on the Maintain Programs - Details page for any programs. **Note:** If you enable program auto-enrollment for your system, you must use the Program Top of Stack Updates Page to run the one-time process that sets the Top of Stack flag for all of your existing program registrations.

Display Reason Codes

You can enable administrators to select a reason code when they make certain updates to a learner's certification status through the program roster. Use the Reason Codes page to create reason codes and the Reason Code Mapping page to associate reason codes with the certification statuses that you select here.

See Defining Reasons for Program and Class Status Updates.

Field or Control	***Description***
Status	Identify the statuses for which administrators can select a reason code. Values are *Completed, Denied, Dropped, Expired, In Progress, Not Completed, Pending Approval, Pending Payment, Planned, Registered, Reissue, Revoked, Waived,* and *Warning.*

Enable Approvals

Selecting the Program Registration check box causes an Approval Type field and a Special Approver field to display on the Maintain Programs - Details page. An administrator can use these fields to define the approval requirements for program registrations.

Related Links

Understanding the Approval Framework

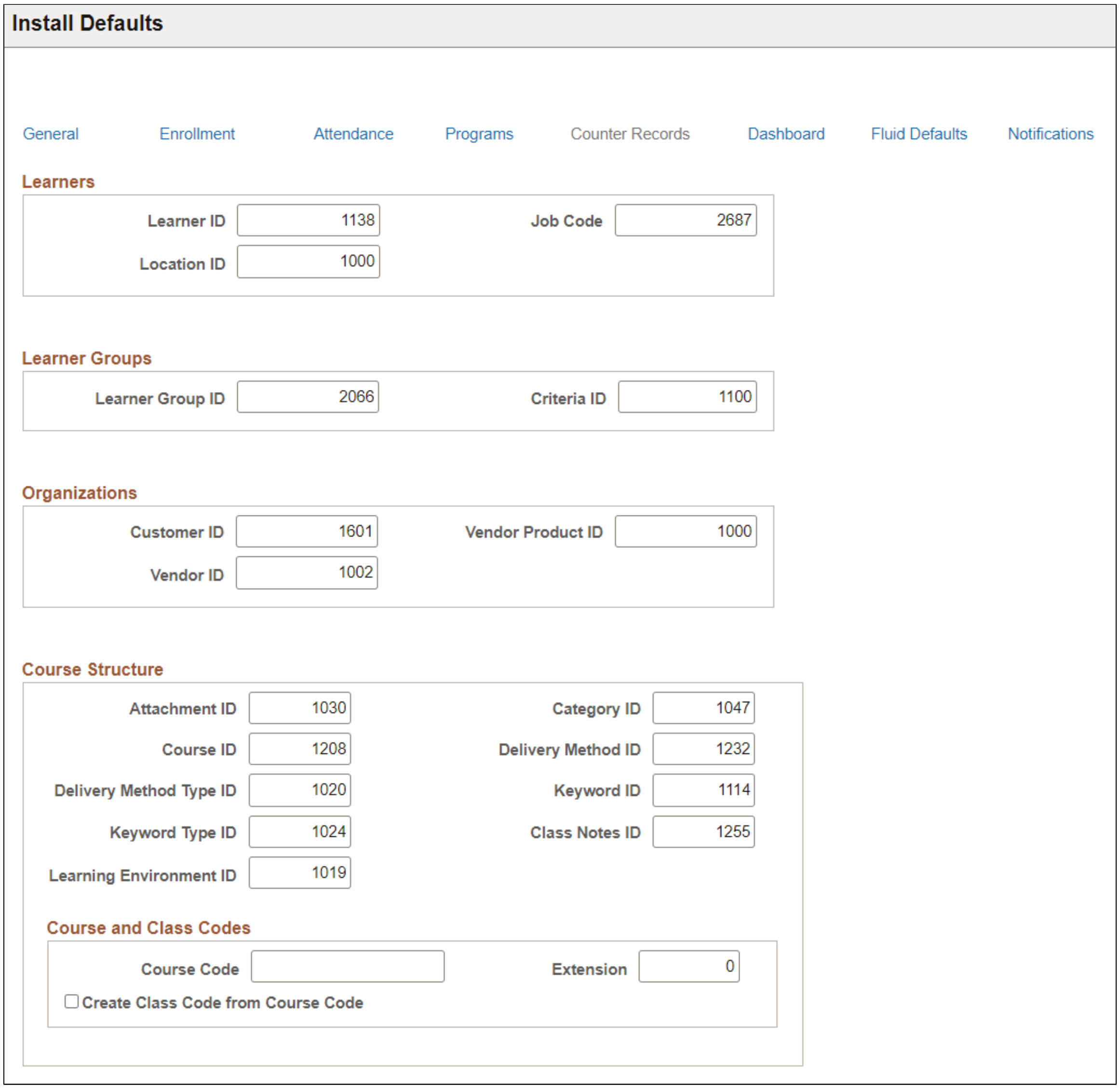
Install Defaults – Counter Records Page

Use the Install Defaults – Counter Records page (LM_CNTR_SETUP_PG) to reset the counter records for various IDs that you create throughout the Enterprise Learning Management system.

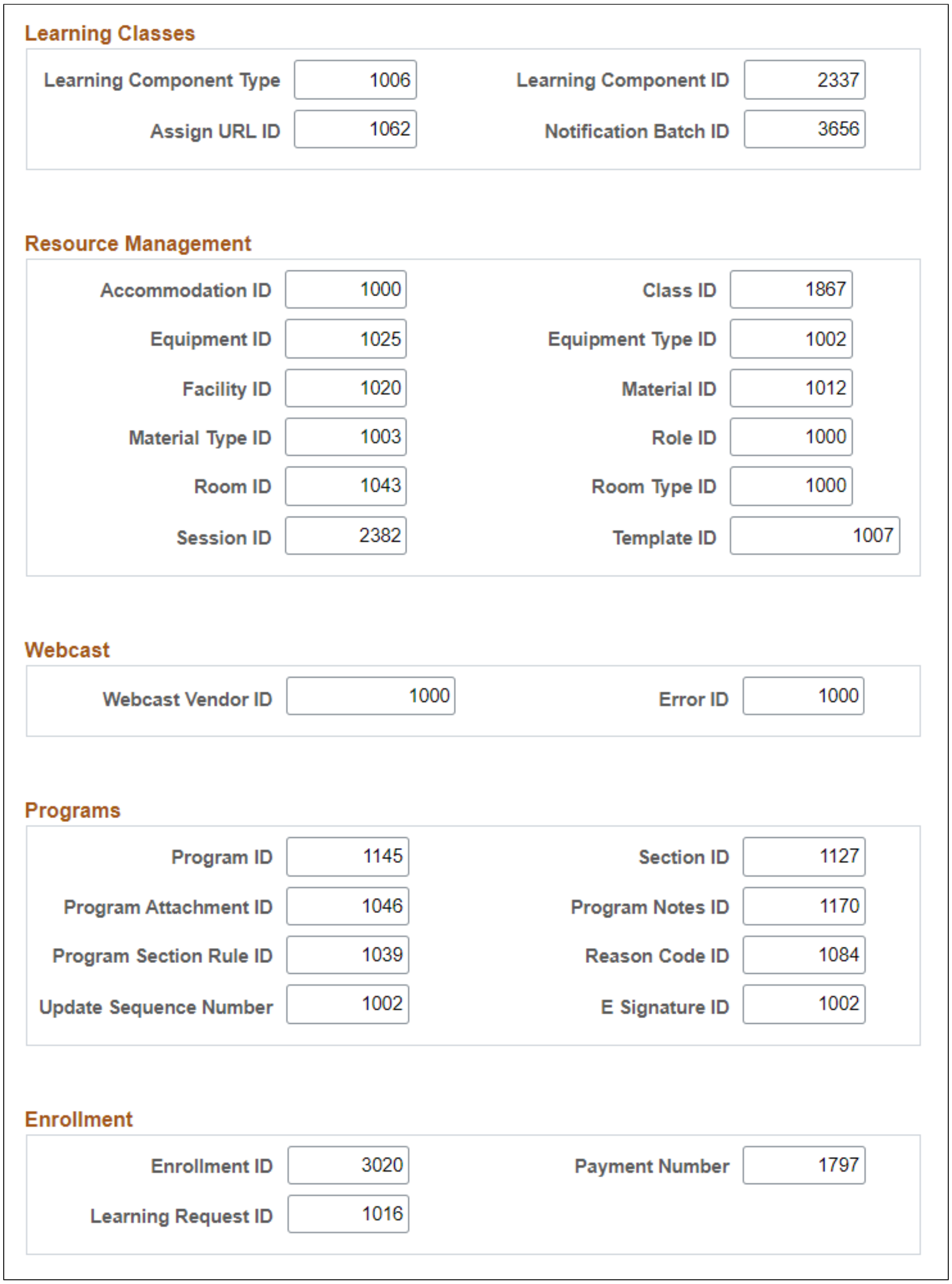
Navigation:

Set up ELM > **Install Defaults** > **Counter Records**

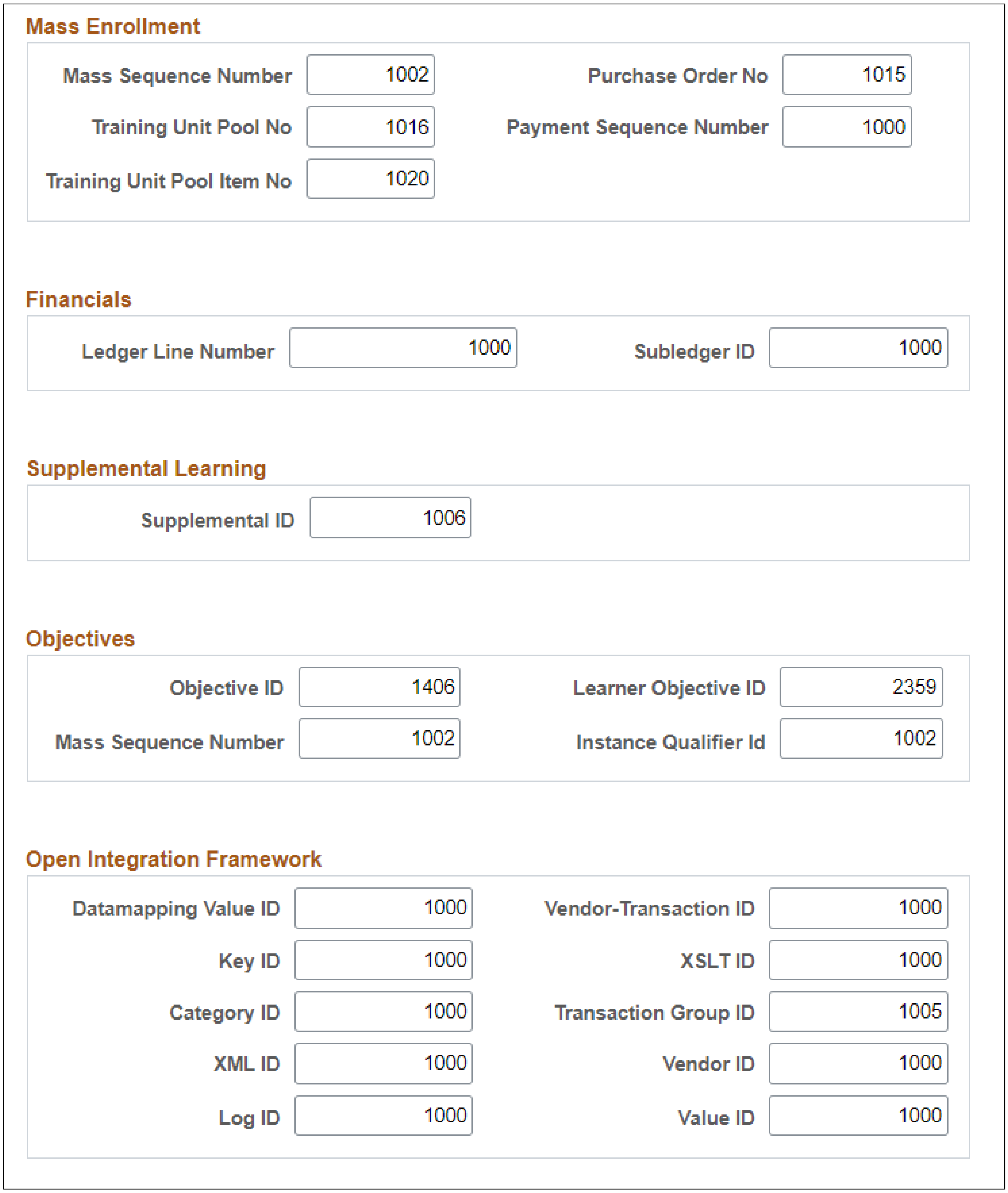
This example illustrates the fields and controls on the Install Defaults – Counter Records page (1 of 5).



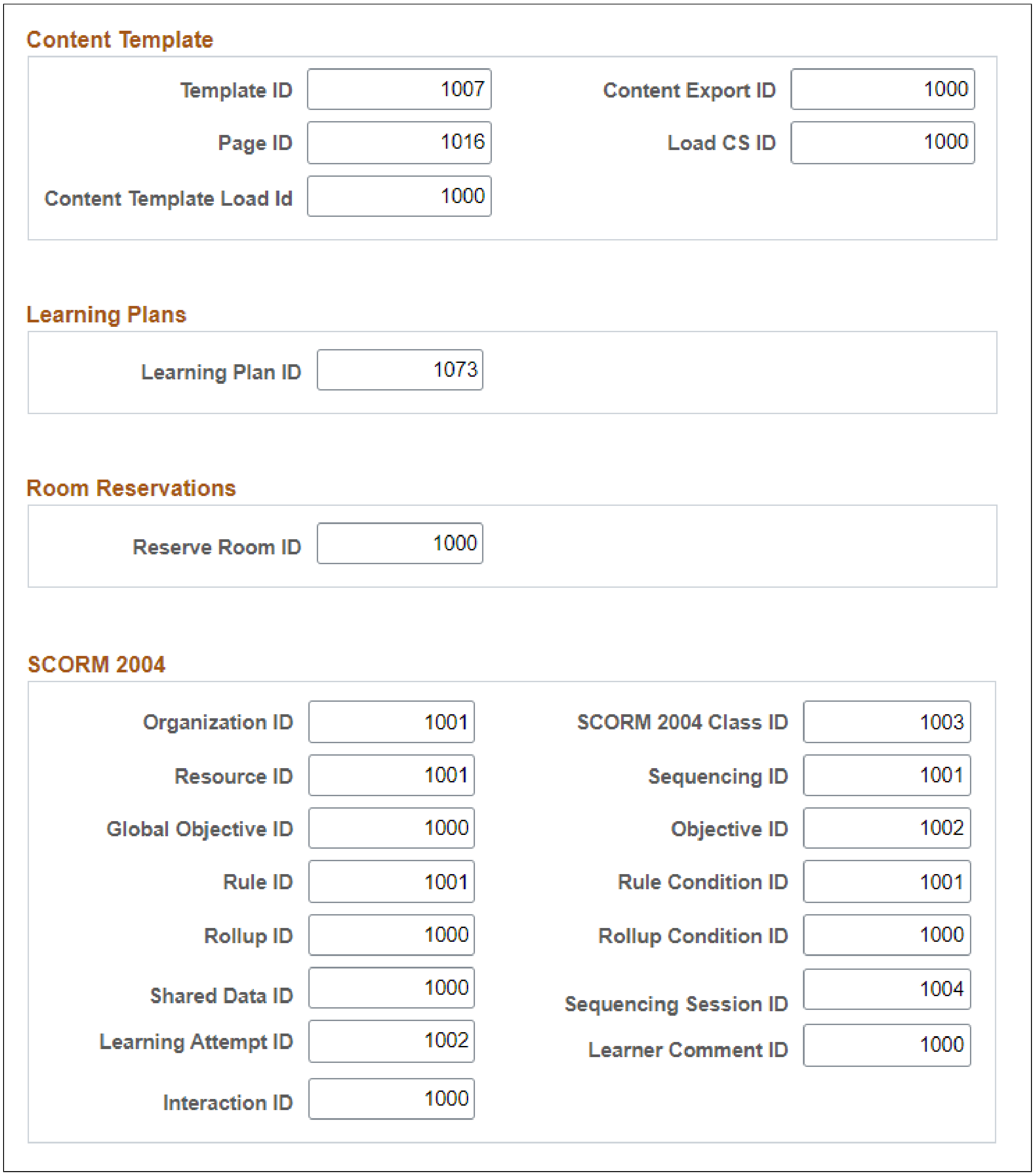
This example illustrates the fields and controls on the Install Defaults – Counter Records page (2 of 5).



This example illustrates the fields and controls on the Install Defaults – Counter Records page (3 of 5).



This example illustrates the fields and controls on the Install Defaults – Counter Records page (4 of 5).


Content Template

Template ID	1007	Content Export ID	1000
Page ID	1016	Load CS ID	1000
Content Template Load Id	1000		

Learning Plans

Learning Plan ID	1073

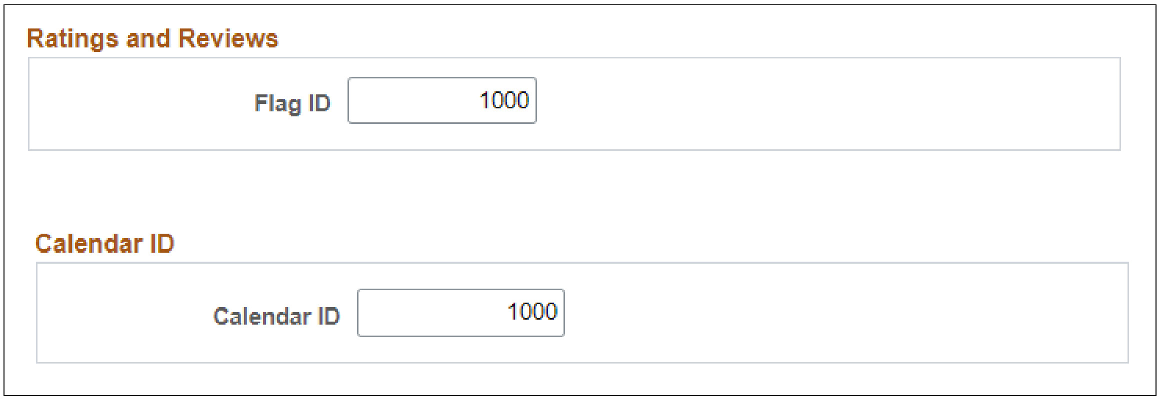
Room Reservations

Reserve Room ID	1000

SCORM 2004

Organization ID	1001	SCORM 2004 Class ID	1003
Resource ID	1001	Sequencing ID	1001
Global Objective ID	1000	Objective ID	1002
Rule ID	1001	Rule Condition ID	1001
Rollup ID	1000	Rollup Condition ID	1000
Shared Data ID	1000	Sequencing Session ID	1004
Learning Attempt ID	1002	Learner Comment ID	1000
Interaction ID	1000		

This example illustrates the fields and controls on the Install Defaults – Counter Records page (5 of 5).



Enterprise Learning Management automatically assigns an ID number or *counter* to many records as they are created. Initially, counters are set to 0 or 1000, depending on the type of record. When a new record is created, the system increments the counter by one. For example, if the Learner ID is set to 1000, when you add a new learner, the system assigns the learner ID, 1001. The ID numbers that were last assigned are always displayed on the Install Defaults – Counter Records page.

You can adjust the counters if necessary. For example, if during implementation you need to import legacy records that already have IDs, you can set the counter to a number higher than the last legacy ID. This ensures that the system will assign a unique ID to each new record that you add in Enterprise Learning Management.

Note: The system incrementally increases all counters for any internal Enterprise Learning Management processes. It does not increment IDs for data that you load from external sources through external means, such as through Structured Query Language.

Field or Control	*Description*
Fix Counters	This button initiates a program that analyzes the records that use counters and make corrections should the counters get out of sync. Counter records can occasionally get out of sync if you are loading or modifying data via scripts (typically during implementation).

Course and Class Codes

Field or Control	*Description*
Course Code	Enter a value in this field to enable the automatic generation of course codes. The value you enter here becomes the prefix for the course codes of all new courses that you create.

Field or Control	***Description***
Extension	When you create a new course, the system increments this counter by one and appends that number to the **Course Code** value to create a unique course code for a new course. For example, if you enter *PSFT* in the **Course Code** field and the current number in the **Extension** field is *0,* the system assigns a course code of PSFT-1 to the next course that you create.
Create Class Code from Course Code	Select to enable the automatic generation of class codes. The system generates class codes based on the automatically generated course codes. For example, the first class created for the PSFT-1 course code would have a class code of PSFT-1-1.

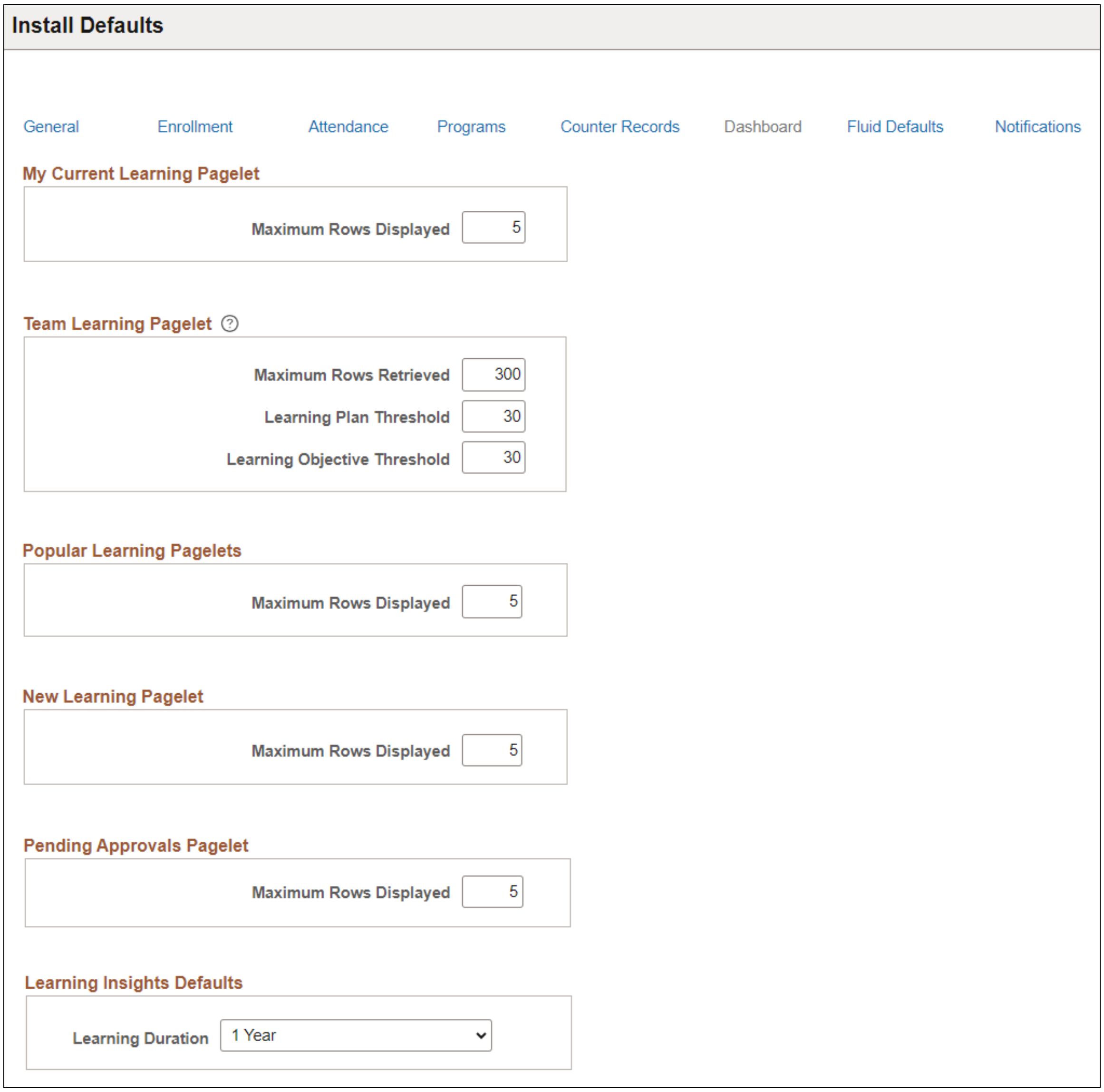
Install Defaults – Dashboard Page

Use the Install Defaults – Dashboard page (LM_IN_DFLT_DASHBRD) to define default rules for the Learning Home dashboard at the installation level.

Navigation:

Set up ELM > **Install Defaults** > **Dashboard**

This example illustrates the fields and controls on the Install Defaults – Dashboard page.



My Current Learning Pagelet

Field or Control	***Description***
Maximum Rows Displayed	Specify the maximum number of rows that appear in the My Current Learning pagelet of the Learning Home.

Team Learning Pagelet

Field or Control	***Description***
Maximum Rows Retrieved	Specify how many rows the Team Learning Pagelet displays when you click the View All link.
Learning Plan Threshold	Specify the number of days that the system uses to determine when to display the Due Soon icon for a learning plan in the Team Learning and My Current Learning pagelets.
Learning Objective Threshold	Specify the number of days that the system uses to determine when to display the Due Soon icon for an objective in the Team Learning and My Current Learning pagelets.

Popular Learning Pagelets

Field or Control	***Description***
Maximum Rows Displayed	Specify the maximum number of rows that appear in the Highest Rated Learning and Most Enrolled Learning pagelets of the Learning Home.

New Learning Pagelet

Field or Control	***Description***
Maximum Rows Displayed	Specify the maximum number of rows that appear in the New Learning pagelet of the Learning Home.

Pending Approvals Pagelet

Field or Control	***Description***
Maximum Rows Displayed	Specify the maximum number of rows that appear in the Pending Approvals pagelet of the Learning Home.

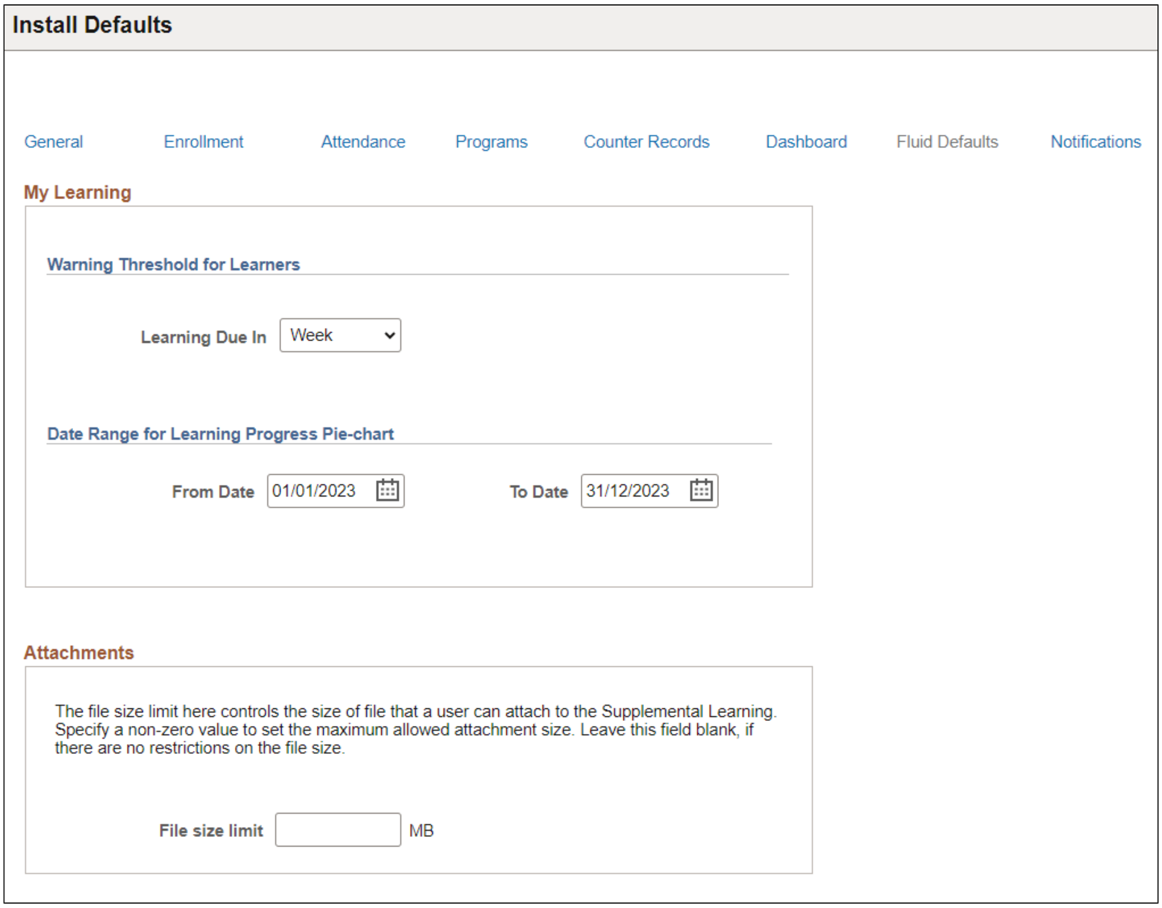
Install Defaults – Fluid Defaults Page

Use the Install Defaults – Fluid Defaults page (LM_IN_DFLT_CMP) to define the default rules for Fluid pages at the installation level.

Navigation:

Set up ELM > Install Defaults > Fluid Defaults

This example illustrates the fields and controls on the Install Defaults – Fluid Defaults page. You can find definitions for the fields and controls later on this page.



My Learning

Use the **Learning Due In** drop-down list to set the warning threshold for Learners. The available values are **Week** and **Month**.

Use the **From** and **To** dates to set the data range for the Learning Progress Pie-chart displayed on the My Learning tile.

Attachments

Use the **File size limit** field to set the maximum size of the file a user can attach to the Supplemental Learning.

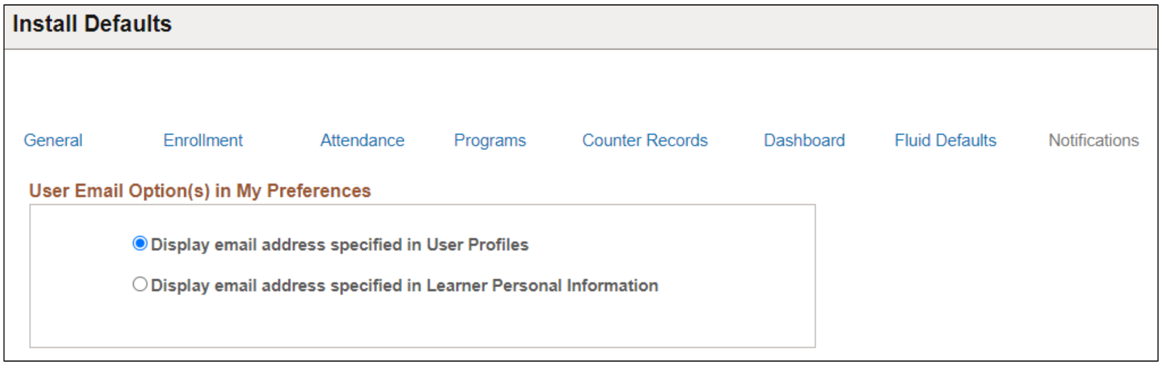
Install Defaults – Notifications Page

Use the Install Defaults – Notifications Page (LM_IN_NOTIF_DFLT) to define the email configuration for notifications.

Navigation:

Set up ELM > **Install Defaults** > **Notifications**

This example illustrates the fields and controls on the Install Defaults – Notifications page. You can find definitions for the fields and controls later on this page.



Use the options in this page to configure the email address displayed in the My Preferences page. The notifications are sent to the email address displayed in the My Preferences page. To know more on My Preferences, see *PeopleTools: Applications User's Guide*, "Personalizing Notifications", Defining User Preferences.

Select **Display email address specified in User Profiles** if you want to use the email address defined in your User Profile page. To know more on how to configure your email address in the User Profile page, see *PeopleTools: Security Administration*, "Specifying User Profile Attributes", Setting General User Profile Attributes.

Select **Display email address specified in Learner Personal Information** if you want to use the email address defined in your learner record. To view the email address in the learner record, see Internal Learner and External Learner. If you save the settings with this option, then the system overrides the default App Class with the LM_USER_UTILITIES:UserDataMapping.getUserNotificationOptions method. To know more on how to configure the App Class, see *PeopleTools: Fluid User Interface Developer's Guide*, "Administering Notifications", Configuring User Data Mapping.

Note: If the ELM administrator chooses to display the email address from Learner Personal Information and this information is not available in the learner record, then the system defaults the email address available in the User Profile page.

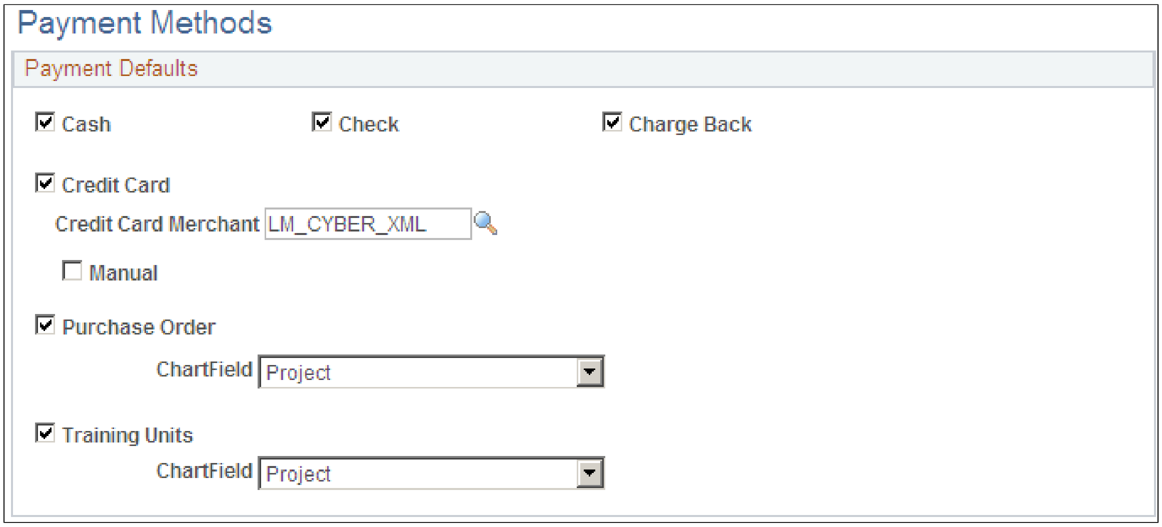
Payment Methods Page

Use the Payment Methods page (LM_SYS_PYT_MTHD_DF) to define default payment methods for an organization.

Navigation:

Set up ELM > **Financial Details** > **Payment Methods** > **Payment Methods**

This example illustrates the fields and controls on the Payment Methods page.



Payment methods relate to the payment of enrollment and registration fees. The payment methods that you select on this page appear by default on the Learning Environments - Defaults page in the Learning Environments component, where you can override the default values.

Field or Control	***Description***
Cash	Select to enable cash as a valid payment method for organizations.
Check	Select to enable checks as a valid payment method for organizations.
Charge Back	Select to enable chargebacks as a valid payment method for organizations.
Credit Card	Select to enable credit cards as a valid payment method for organizations. PeopleSoft Credit Card Processing Interface provides credit card functionality for Enterprise Learning Management.
Credit Card Merchant	Select the third-party merchant that provides credit card authorization and payment for your organization.
Manual	Select to disable third-party integration and enable manual credit card processing. Enterprise Learning Management stores encrypted credit card information for a transaction during enrollment or registration. To support manual processing, you must build or supply your own process to read encrypted credit card data from the PeopleSoft tables and then manually process the credit card transaction.

Field or Control	*Description*
Purchase Order	Select to enable purchase orders as a valid payment method for organizations.
ChartField	Select the account that you want to use to track revenue for purchase orders. The system uses the Chartfield that you specify for all purchase orders, which you can track on the Maintain Purchase Orders page. If you set up the purchase orders in PeopleSoft Financials and create a means to post revenue from Enterprise Learning Management to PeopleSoft Financials, then when you post this revenue the system updates the specified account. This functionality is not delivered. See Setting Up and Managing Purchase Orders.
Training Units	Select to enable training units as a valid payment method for the organization. Training units are prepaid units that can be purchased by an external organization, often at a discounted price. Training units are depleted from the prepaid account each time a learner is charged an enrollment, registration, or drop fee.
ChartField	Select the account that you want to use to track revenue for purchased training units. The system uses the Chartfield that you specify for all training units, which you can track by customer on the Define Customers - Payment Information page. If you set up the training units in PeopleSoft Financials and create a means to post revenue from Enterprise Learning Management to PeopleSoft Financials, then when you post this revenue for training units the system updates the specified account. This functionality is not delivered. See Payment Information Page.

Optimizing Manager View Performance

This topic provides an overview of manager view and lists the page used to optimize manager view performance.

Page Used to Optimize Manager View Performance

Page Name	*Definition Name*	*Usage*
Load Manager Data	LM_MGRVW_RNCTRL	Run the Load Manager Data (LM_ MGRVWAE) process.

Understanding Manager View

To optimize performance when managers access pages in the application that retrieve data from the manager view (LM_MGR_VW) object, you must run the Load Manager Data process. This process assigns the appropriate view text to the LM_MGR_VW object definition based on the specific manager access type that you select on the Install Defaults - General page. Each manager access type has different view text. Because the script that is part of the manager view definition is based on only one manager access type rather than all manager access types after you run the process, the system is able to retrieve data from the view faster. Managers are therefore able to access pages that retrieve data from this view faster.

Note: You typically select the manager access type once and only run this process once during implementation. Once your implementation is live, you can run this process on an as-needed basis.

Modifying Passing, Grading, and Attendance Schemes

To setup default values for passing status, grades, and attendance use the Passing Scheme (LM_PASS_SCH), Grading Scheme (LM_GRA_SCHEME), and Attendance Scheme (LM_ATT_SCHEME) components.

Pages Used to Modify Passing, Grading, and Attendance Schemes

Page Name	***Definition Name***	***Usage***
Passing Scheme Page	LM_PASS_SCH	Modify the labels for the delivered passing statuses of the passing scheme. The passing statuses are: pass, fail, not required, pending, not marked. Associate these passing statuses to grades on the Grading Scheme page.
Grading Schemes Page	LM_GRD_SCH_PG	If the organization uses grades, modify the grading scheme by defining the grades that can be assigned at the completion of a class. Associate a passing status to each grading label.
Attendance Schemes Page	LM_ATT_SCH_PG	Modify the attendance scheme by defining the labels for marking attendance.

Understanding Passing, Grading, and Attendance Schemes

PeopleSoft delivers a predefined passing scheme, grading scheme, and attendance scheme that lists the values that you can use to grade learners and mark their attendance. Passing scheme values define the status of grading scheme values. Grading and attendance scheme values are the values that appear on the learners' self-service pages.

Each grade, pass, and attendance value is associated with a status which can affect a learner's enrollment status. For example, when a learner who is enrolled in a scheduled class attends and passes the class, the enrollment status changes to completed. This change in the enrollment status causes the learner's objectives to be updated.

You can modify the delivered grading and attendance values. For example, say that you want to track learners who arrive late. The delivered attendance scheme does not include this label; it includes labels for Attended, Not Attended, and Unknown only. You add a new label called very late and give it the status of Attended. You might also decide to change the label for Attended to present. Each status must be represented at least once in the scheme. For passing schemes you can modify the delivered labels, but you cannot add new values because the delivered values are built into the processing of grades.

Related Links

Understanding Attendance and Grading

Administering Enrollment-Related Tasks

Passing Scheme Page

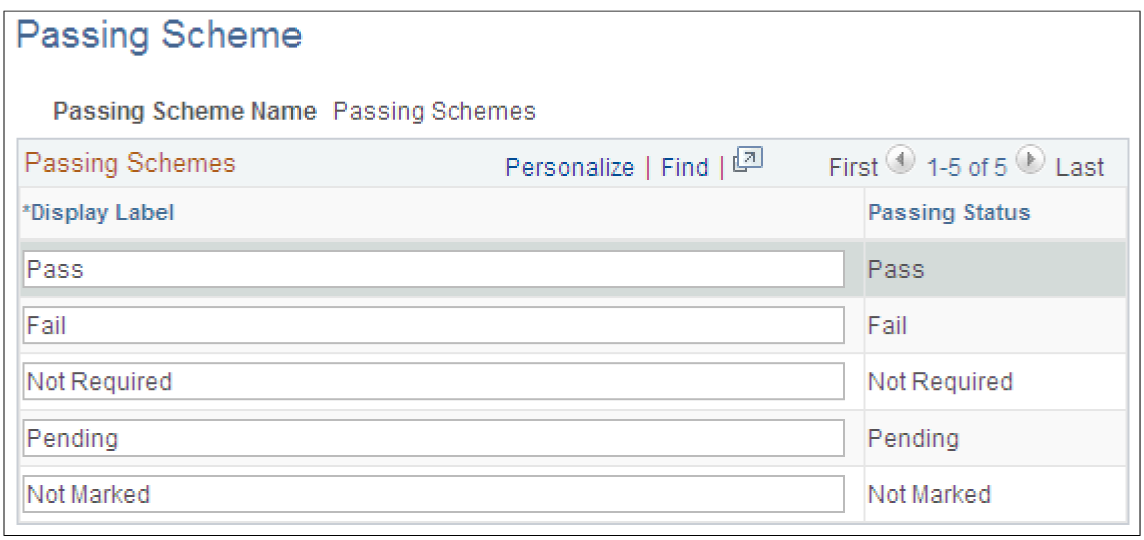
Use the Passing Scheme page (LM_PASS_SCH) to modify the labels for the delivered passing statuses of the passing scheme.

The passing statuses are: pass, fail, not required, pending, not marked. Associate these passing statuses to grades on the Grading Scheme page.

Navigation:

Set Up ELM > **Grades and Attendance** > **Passing Scheme** > **Passing Scheme**

This example illustrates the fields and controls on the Passing Scheme page.



The passing statuses are built into the Auto Mark Class Completion process and are therefore set values that you cannot modify. Use the **Passing** column to change the labels for the corresponding passing statuses. Assign passing statuses to grading scheme values on the Grading Schemes page.

Grading Schemes Page

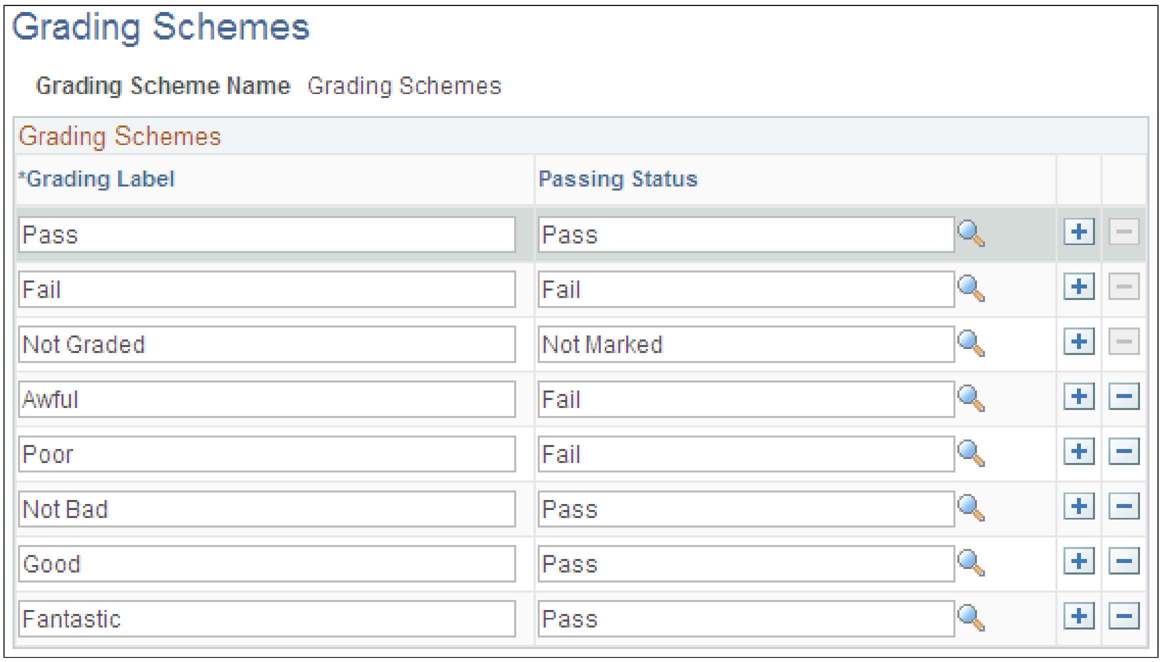
Use the Grading Schemes page (LM_GRD_SCH_PG) to if the organization uses grades, modify the grading scheme by defining the grades that can be assigned at the completion of a class.

Associate a passing status to each grading label.

Navigation:

Set Up ELM > Grades and Attendance > Grading Scheme > Grading Schemes

This example illustrates the fields and controls on the Grading Schemes page.



Field or Control	***Description***
Grading Label	Enter the grade that the learner sees, such as *A, B, C* and *D.* You can link A, B, and C grades to *Pass* status and D grade to *Fail* status.
Status	Select the status that equates to the grading level. You can assign the same status to more than one grading label. Each status must appear in the table at least once. You define labels for passing statuses on the Passing Scheme page.

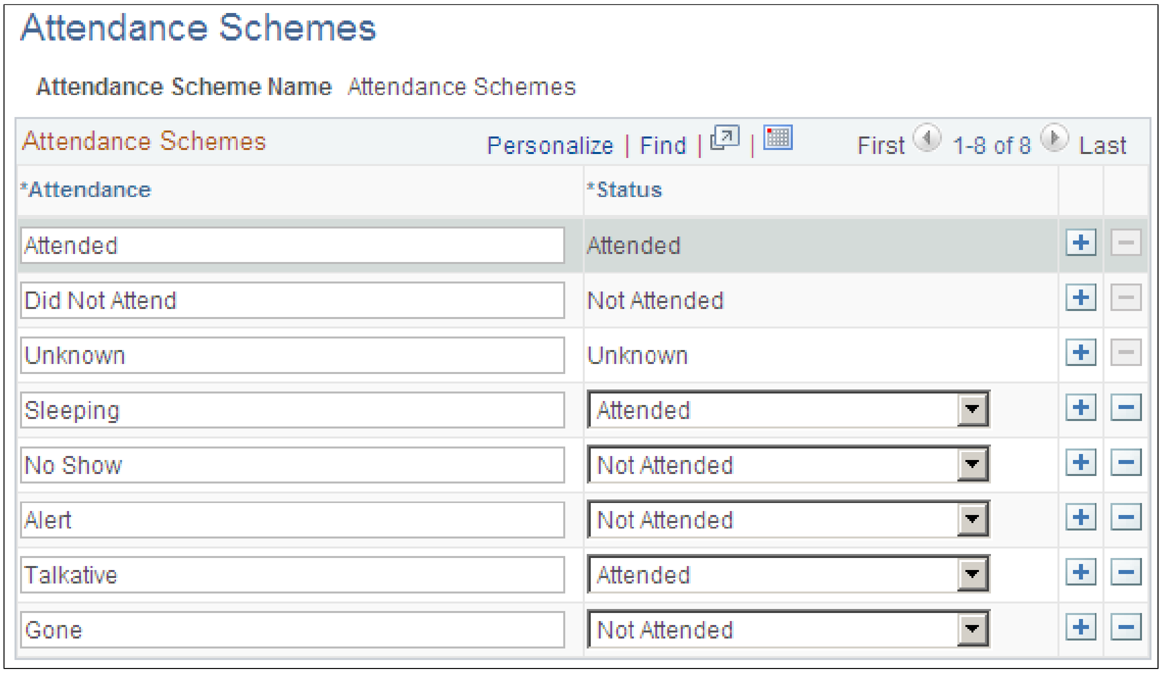
Attendance Schemes Page

Use the Attendance Schemes page (LM_ATT_SCH_PG) to modify the attendance scheme by defining the labels for marking attendance.

Navigation:

Set Up ELM > Grades and Attendance > Attendance Scheme > Attendance Schemes

This example illustrates the fields and controls on the Attendance Schemes page.



This page is similar to the Grading Schemes page. You enter a label, such as very late or left early, and select a status. Values are: *Attended, Not Attended,* or *Unknown.*

Defining Reasons for Program and Class Status Updates

To define reason codes and map them to program or class statuses, use the Reason Codes (LM_RSNCD_TBL) component and the Reason Code Mapping (LM_CERT_STTS_RSN) component.

Pages Used to Define and Map Reason Codes

Page Name	***Definition Name***	***Usage***
Reason Codes Page	LM_RSNCD_TBL	Define reasons for changing program and class statuses.
Reason Code Mapping Page	LM_CERT_RSN	For a particular program status value, associate reasons for changing a learner's status.
Class Reason Code Mapping Page	LM_CLS_RSN	For a particular class status value, associate reasons for changing a learner's status.

Understanding Program and Class Status Updates

The system uses statuses such as registered, in-progress, and dropped, to track a learner's progress through classes and certification programs. While the system automatically updates the learner's status as various events occur, administrators can also update the status manually through the roster pages.

To enable administrators to provide a reason for making certain program status changes, such as setting a learner's certification status to revoked or reissued:

1. Define codes that represent the reasons for updating a learner's program status.

   Define reason codes on the Reason Codes page.

2. Associate the appropriate reason codes with each program status.

   Map reason codes to statuses on the Reason Code Mapping page.

3. Identify the status for which administrators can select a reason.

   Select the default statuses on the Install Defaults - Programs page. You can override these values for a given learning environment.

To enable administrators to provide a reason for making certain class status changes, such as setting a learner's class status to cancelled or rescheduled:

1. Define codes and descriptions that represent the reasons for updating a class status.

   Define reason codes on the Reason Codes page.

2. Associate the appropriate reason codes with each class status.

   Map reason codes to statuses on the Class Reason Code Mapping page.

3. In the Maintain Class page, **Inactive** is the default reason code whenever class status is changed from **Active** to **Inactive**.

   A warning message appears: ”Warning – Class status has been set to Inactive. Student enrollment information will be updated with status and reason.”

Related Links

Install Defaults – Programs Page

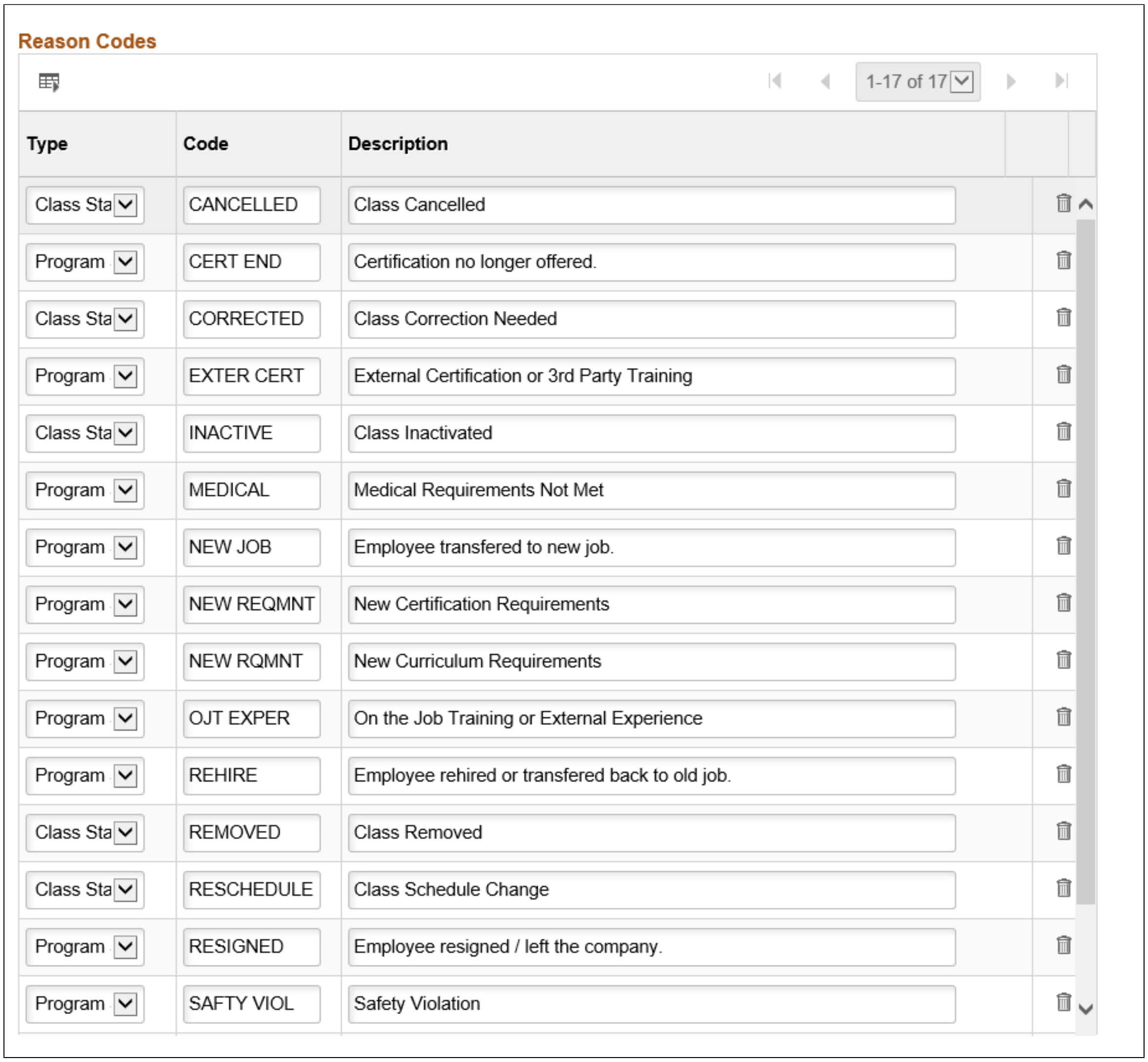
Reason Codes Page

Use the Reason Codes page (LM_RSNCD_TBL) to define reasons for changing program and class statuses.

Navigation:

Set Up ELM > **Catalog** > **Reason Codes**

This example illustrates the fields and controls on the Reason Codes page.



Use this page to define reason codes that you select when updating a learner's program or class status

Field or Control	***Description***
Type	Select the type of reason code: *Class:* Select for class inactivation reasons. *Program:* Select for program status update reasons.
Code	Enter the reason code.
Description	Enter a description for the reason code.

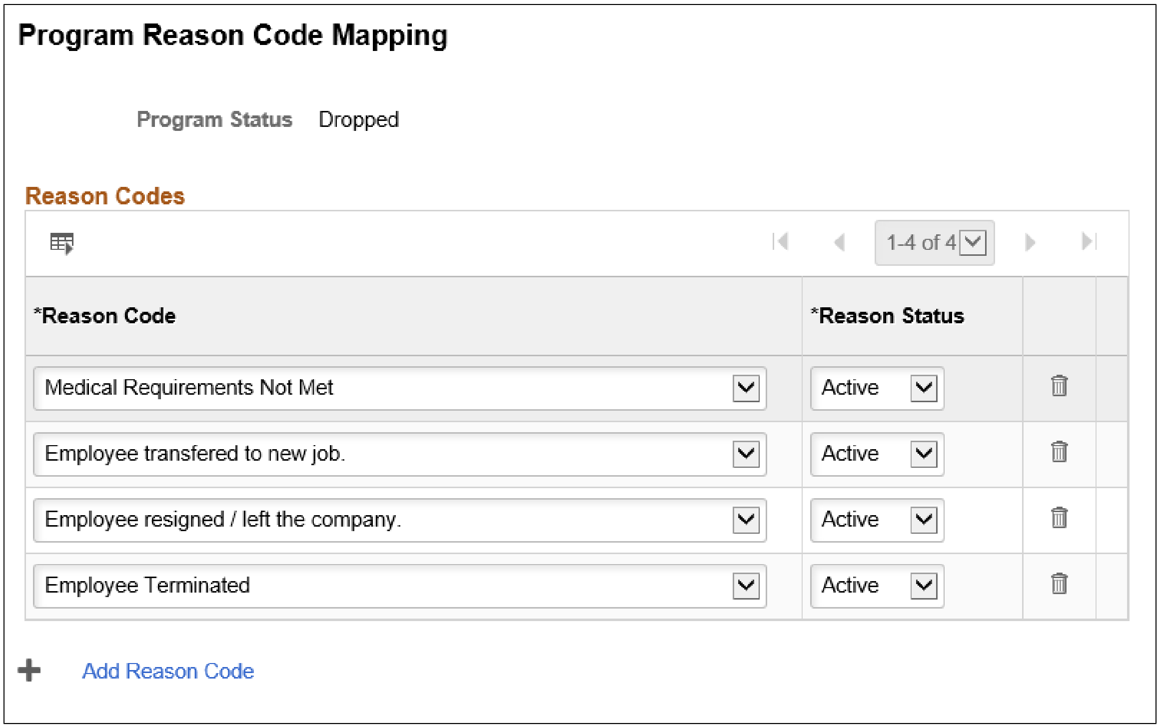
Reason Code Mapping Page

Use the Reason Code Mapping page (LM_CERT_RSN) for a particular program status value, to associate reasons for changing a learner's status.

Navigation:

Set Up ELM > **Catalog** > **Reason Code Mapping**

This example illustrates the fields and controls on the Reason Code Mapping page.



Select the reason codes to associate with a given program status. By default, the status of each reason code is set to Active. A reason code cannot be deleted after it has been used; however, you can set its status to Inactive so that it cannot be selected in the future.

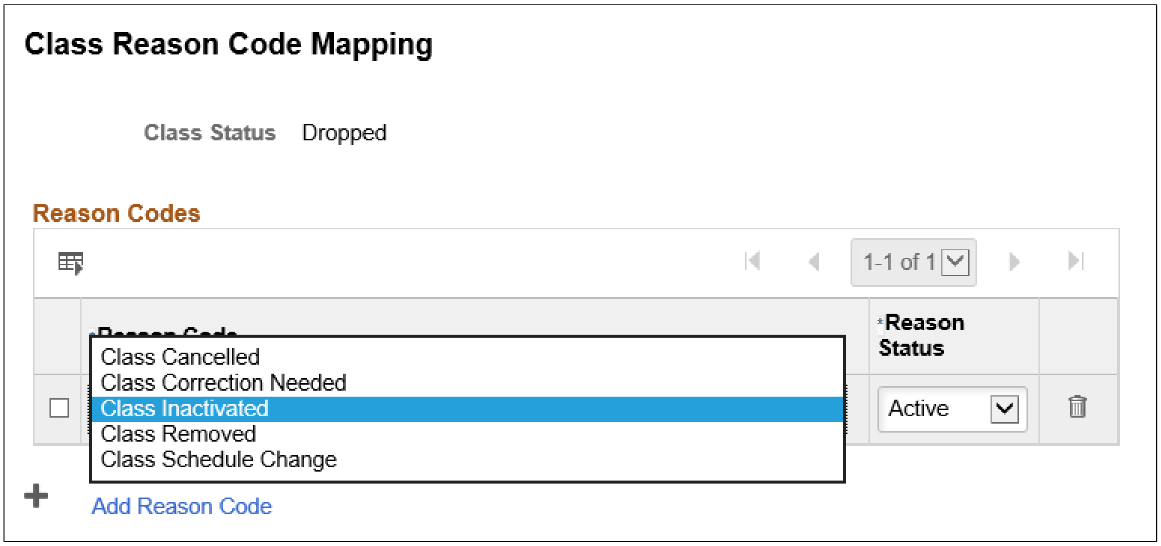
Class Reason Code Mapping Page

Use the Class Reason Code Mapping page (LM_CLS_RSN) for a particular class status value, to associate reasons for changing a learner's status.

Navigation:

Set Up ELM > **Catalog** > **Class Reason Code Mapping**

This example illustrates the fields and controls on the Class Reason Code Mapping page.



Select the reason code and reason status to associate with a given class status. The available reason codes are *Class Cancelled* , *Class Correction Needed*, *Class Inactivated*, *Class Removed* and *Class Schedule Change*.

Defining Auto Drop Status Options

Page Used to Define Auto Drop Status Options

Page Name	***Definition Name***	***Usage***
Defining Auto Drop Status Options	LM_AUTO_DROP_STS	Specify the statuses of classes or mandatory learning enrollments that the system drops automatically when their associated programs or Learner Groups are dropped.

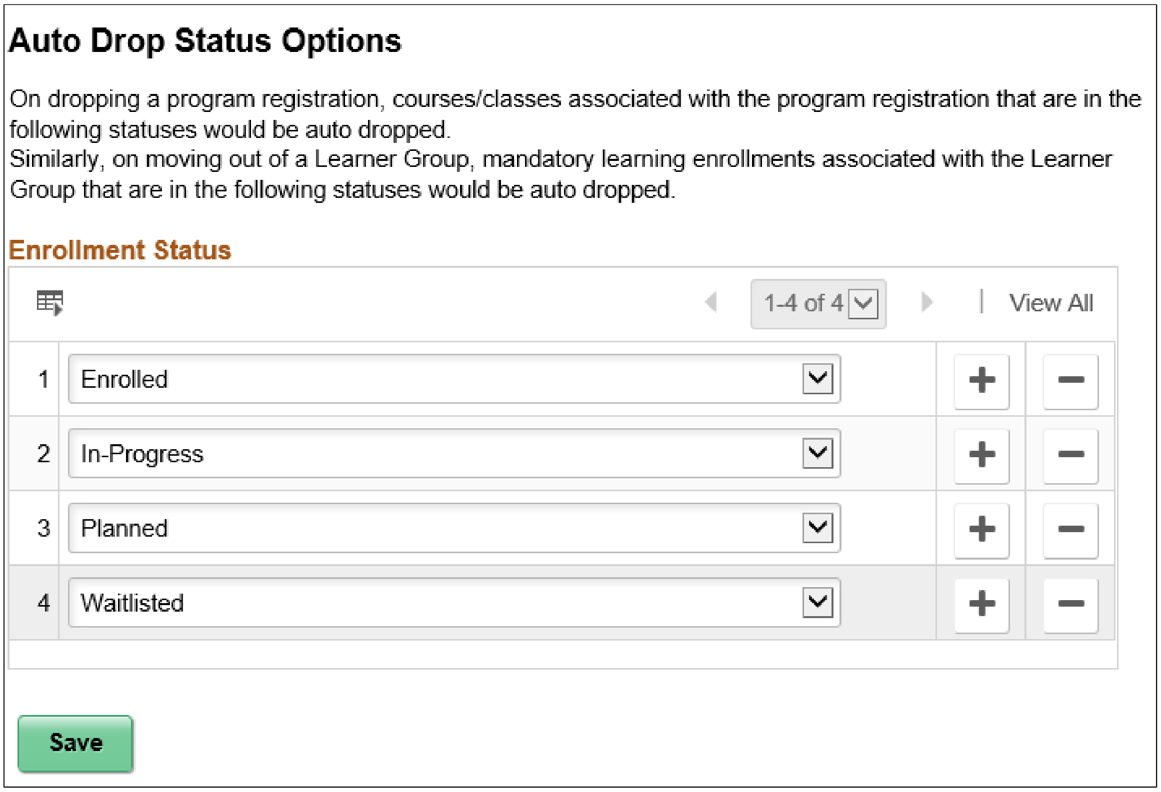
Auto Drop Status Options Page

Use the Auto Drop Status Options page (LM_AUTO_DROP_STS) to specify the statuses of classes or mandatory learning enrollments that the system drops automatically when their associated programs or Learner Groups are dropped.

Navigation:

Set Up ELM > **Catalog** > **Auto Drop Status Options**

This example illustrates the fields and controls on the Auto Drop Status Options page.



Enrollment Status

Enter a row for each class status you want included in the auto drop process. When a learner drops a program registration, the system also automatically drops classes associated with the program that have any of the statuses that you enter on this page.

When a learner moves out of a Learner Group, the system automatically drops all mandatory learning enrollments associated with the Learner Group that have any of the statuses as specified/entered on this page.

Note: This page is delivered with no statuses defined for automatic drops. You must add statuses to this page to enable automatic class drops.

Defining the Batch Processing Commit Frequency

To set the commit frequency for batch processes, use the Define Commit Frequency (LM_CMIT_FREQ) component.

This topic discusses how to define the commit frequency for batch processes run in Enterprise Learning Management.

Page Used to Define the Batch Processing Commit Frequency

Page Name	***Definition Name***	***Usage***
Batch Processing Commit Frequency Page	LM_CMIT_FREQ_PG	Specify the commit frequency that the system uses for batch processes.

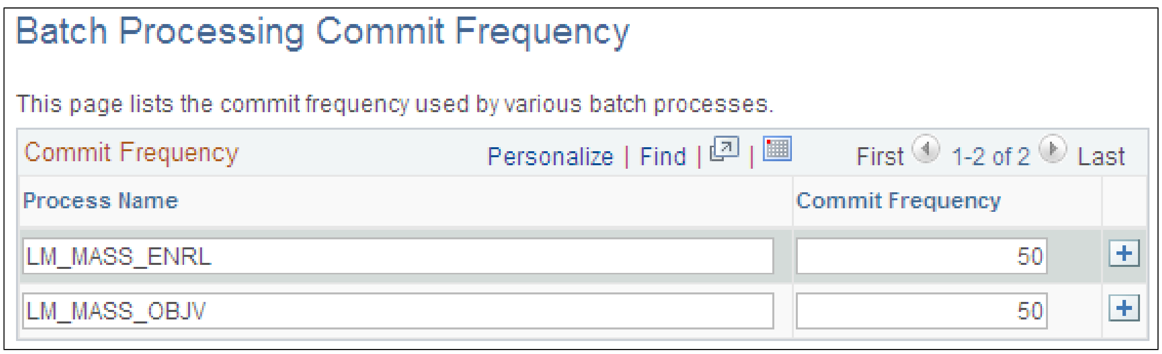
Batch Processing Commit Frequency Page

Use the Batch Processing Commit Frequency page (LM_CMIT_FREQ_PG) to specify the commit frequency that the system uses for batch processes.

Navigation:

Set Up ELM > **Commit Frequency** > **Batch Processing Commit Frequency**

This example illustrates the fields and controls on the Batch Processing Commit Frequency page.



Field or Control	***Description***
Process Name	Enter the process name. The name of the mass enrollment process is LM_MASS_ENRL; the name of the mass objectives assignment process is LM_MASS_OBJV.
Commit Frequency	Enter the number of records (learners) you want the system to process before committing changes to the database. The default is 50. Consult your organization's database administrator for the appropriate setting for your organization. If the request that you submit contains a lesser number of rows than the commit frequency, the system commits the data just once at the end of the batch run. For example, if you submit a mass enrollment request for 250 learners, the system commits the data every 50 rows. However if you submit a mass enrollment request for 24 learners, the system commits the data just once after processing all rows. **Note:** This is a system configuration option that needs to be set just once.

Related Links

Managing Mass Enrollment

Managing Group and Mass Objective Assignments

Enabling Workflow for Notifications

This topic discusses how to enable workflow.

Page Used to Enable Workflow for Notifications

Page Name	***Definition Name***	***Usage***
Worklist System Defaults Page	WF_SYS_DEFAULTS	Enable workflow for enrollment, program, and class notifications.

Related Links

Sending Enrollment, Registration, and Waitlist Notifications

Sending Program Notifications

Sending Class Notifications

Worklist System Defaults Page

Use the Worklist System Defaults page (WF_SYS_DEFAULTS) to enable workflow for enrollment, program, and class notifications.

Navigation:

PeopleTools > **Workflow** > **Defaults and Messages** > **Set Workflow Defaults** > **Worklist System Defaults**

Several enrollment-related events generate automated email notices to learners, provided that you enable workflow email notifications. To enable workflow, enter the system administrator's ID in the **User ID** field, and then select the **Email Active** option.

Modifying Text on the Self-Service Pages

Enterprise Learning Management makes use of the text catalog for storing text that appears on self-service pages, including field labels, button and link names, page instructions, and warnings. You can modify text that appears on a page by editing text in the text catalog. Text can be specific to a learning environment.

Related Links

Setting Up the Text Catalog

Defining Search Filters

To define search filters, use the Learning Filters (LM_FILTER) component.

Page Used to Define Search Filters

Page Name	*Definition Name*	*Usage*
Learning Filter Page	LM_FILTER	Define search filters for use on self-service pages and the View All Learning component.

Understanding Search Filters

Search filters enable learners and managers to perform focused searches through their own or their direct reports' learning records on the self-service My Learning and Team Learning pages. Administrators can use the same set of filters to view learner records through the View All Learning (LM_ADMIN_LEARNING) component.

Note: Search filters are associated with the learning environment of the user who creates them. Users can access only the search filters associated with their learning environment.

To define search filters, specify the attributes of the classes and programs, learning requests, and supplemental learning types that you want the search filter to retrieve. There are six categories of attributes you can use to limit search results:

Category	*Use and Description*
1. Mandatory filter	Use to limit a search to classes that are mandatory. If the **Display Only Mandatory Learnings** check box is selected, then the filter returns only the mandatory learning classes for the configured enrollment statuses and the class delivery methods.
2. Enrollment Status	Use to limit a search to classes and programs, supplemental learning types, or learning request types having a specific enrollment or registration status. For example, only classes and programs with an enrollment or registration status of *Completed* or *Waived,* or only supplemental learning with an enrollment status of *Planned.* **Note:** Enrollment and registration statuses are delivered with the system and are assigned to learners based on where they are in the learning process.

Category	*Use and Description*
3. Class and Program Delivery Method (applies only to classes and programs)	Use to limit a search to classes and programs using a specific set of delivery methods. For example, only classes and programs delivered as *External Vendor Self-Paced* or *Instructor Led Classroom* courses. **Note:** Delivery methods are defined by the customer using the Delivery Method Type (LM_DMTHD_TYPE) component.
4. Supplemental Learning Type (applies only to supplemental learning).	Use to limit a search to specific types of supplemental learning. For example, only supplemental learning defined as *On-The-Job Training* or *Equivalent Experience.* **Note:** Supplemental learning types are defined by the customer using the Define Supplemental Learning (LM_ ADHC_SETUP) component.
5. Learning Request Type (applies only to learning requests)	Use to limit searches to specific types of learning requests. For example, only learning requests defined as *Online* or *Classroom.* **Note:** Learning request types are delivered with the system.
6. Time period of search.	Use to limit a search to a specific period of time. For example, you could limit a search to all learning completed in the last 180 days, or to all learning with enrollment dates falling within the year 2006.

When building search filters, take note of the following:

- To create a filter to search for classes and programs, combine attributes from the Class and Program Delivery Method category with attributes from the Enrollment Status and Time Period of Search categories.

  The relationship between the Class and Program Delivery Method category and the Enrollment Status and Time Period of Search categories is based on an implicit *AND* operator. For example, assume that you create a search filter to return all classes and programs with an enrollment status of *Completed,* a delivery method of *Instructor Led Classroom,* and a time period of January 1 to December 31, 2006. All of these conditions must be true for a class or program to be included in the search results.

- To create a filter to search for learning requests, combine attributes from the Learning Request Type category with attributes from the Enrollment Status and Time Period of Search categories.

  The relationship between The Learning Request Type category and the Enrollment Status and Time Period of Search categories is based on an implicit *AND* operator. For example, assume that you create a search filter to return all learning requests with an enrollment status of *Requested,* a learning request type of *Classroom,* and a time period of January 1 to December 31, 2006. All of these conditions must be true for a learning request to be included in the search results.

- To create a filter to search for supplemental learning, combine attributes from the Supplemental Learning Type category with attributes from the Enrollment Status and Time Period of Search categories.

  The relationship between the Supplemental Learning Type category and the Enrollment Status and Time Period of Search categories is based on an implicit *AND* operator. For example, assume that you create a search filter to return all supplemental learning with an enrollment status of *Planned,* a supplemental learning type of *External Learning,* and a time period of January 1 to December 31, 2006. All of these conditions must be true for a supplemental learning type to be included in the search results.

- You can create learning filters to search for a single type of learning (for example, only classes and programs, or only learning requests), or for different types of learning at the same time (for example, classes and programs in combination with learning requests and supplemental learning).

- Within a single category, the relationship between the selected conditions is based on an implied *OR* operator. For example, if you create a filter based on the values *Pending Approval, Pending Payment,* and *Waitlisted* in the Enrollment Status category, the search will return all learning that satisfies any one of these status conditions.

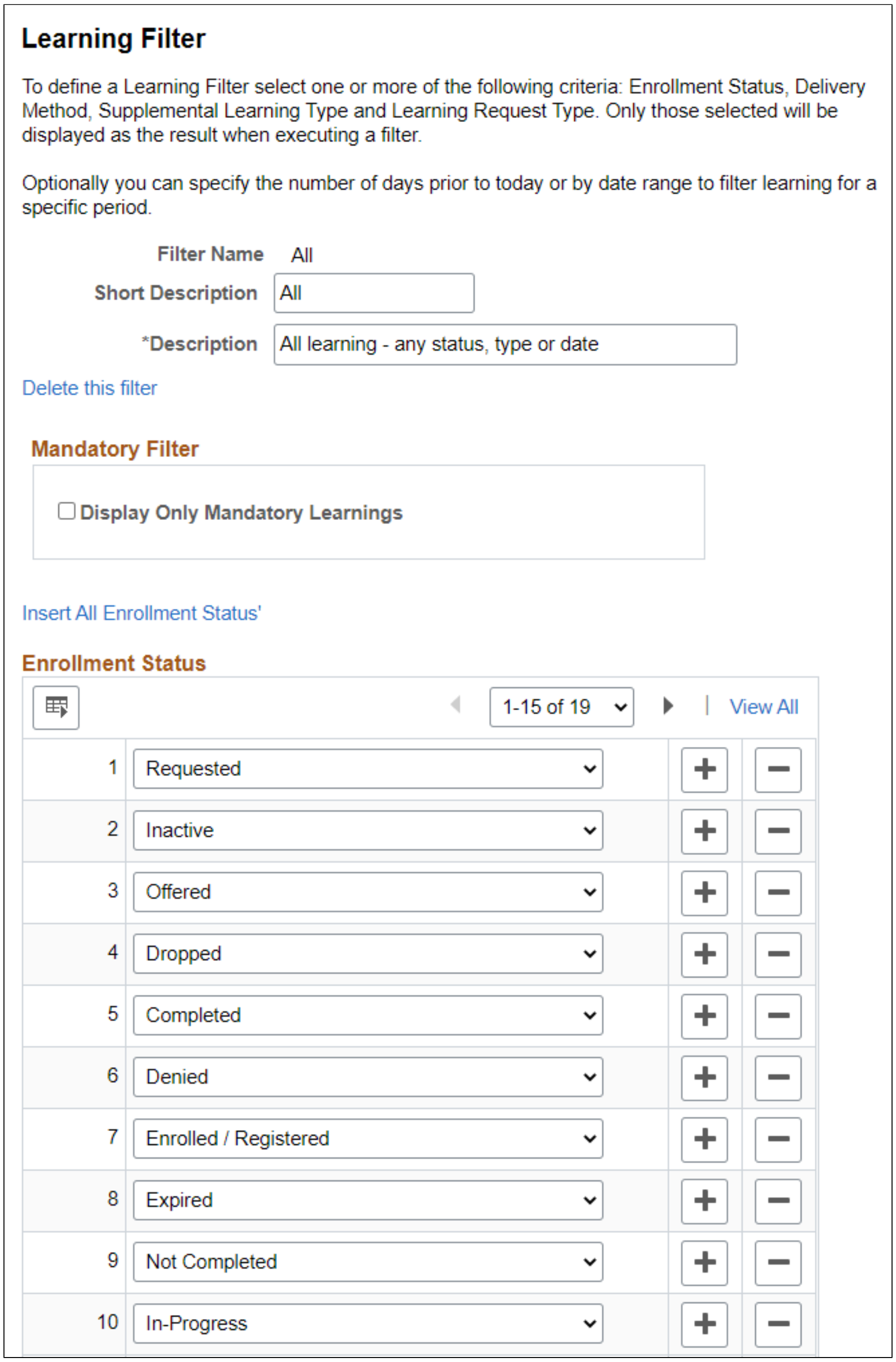
Learning Filter Page

Use the Learning Filter page (LM_FILTER) to define search filters for use on self-service pages and the View All Learning component.

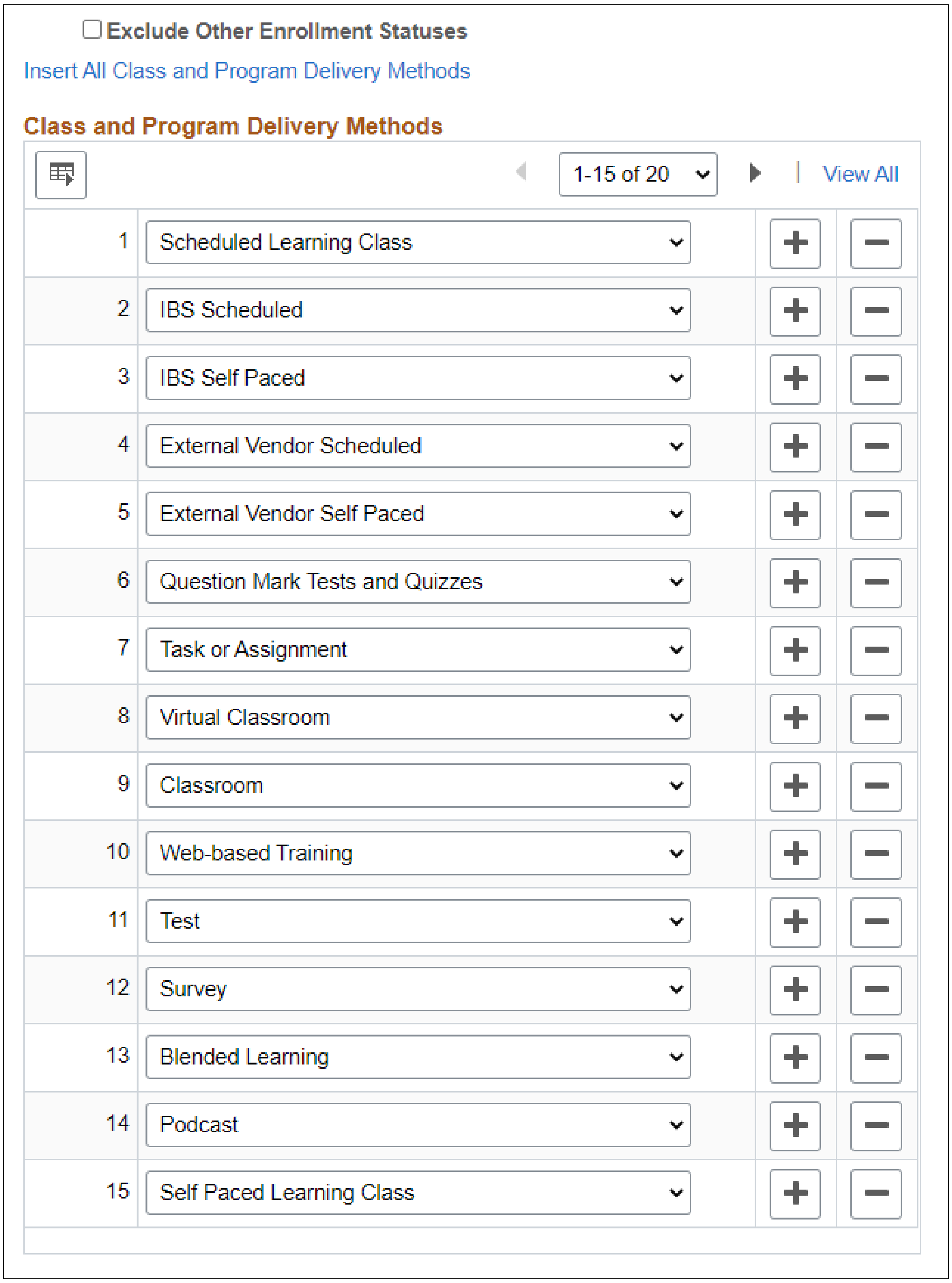
Navigation:

Set Up ELM > **Learning Filters**

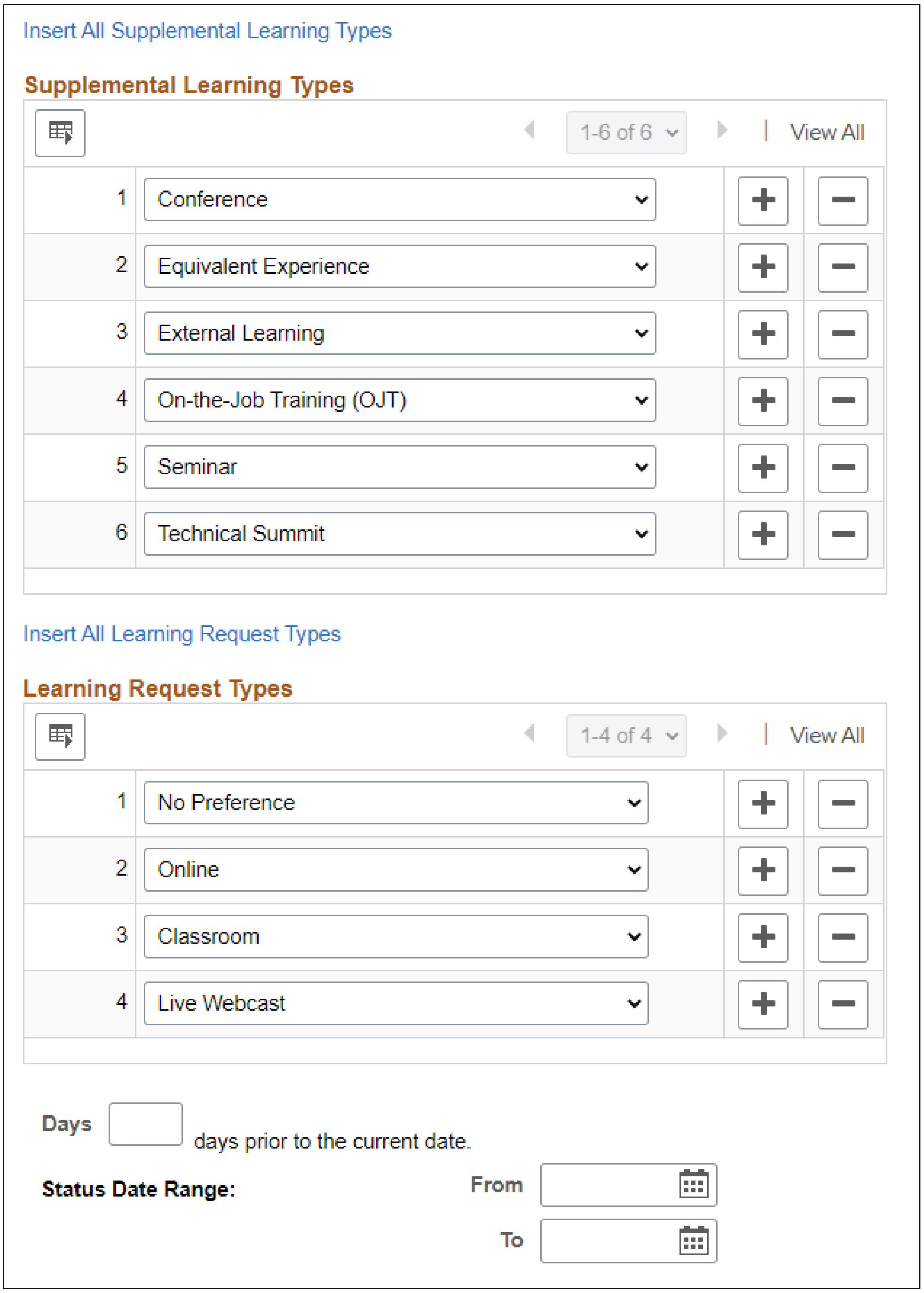
This example illustrates the fields and controls on the Learning Filter page (1 of 3).



This example illustrates the fields and controls on the Learning Filter page (2 of 3).



This example illustrates the fields and controls on the Learning Filter page (3 of 3).



Select the search conditions that have to be met for the system to display a class or program, a learning request, or a supplemental learning type in the search results on the My Learning, Team Learning, or Learner View pages.

Note: When you enter a short description for the filter, then it shows up as short description for the search filters in the Fluid Manage Learning – Details page.

See Understanding Learning Record and Objectives Management.

See Viewing and Managing Learner Transcripts.

Example: Creating a Filter to Search for All Completed Classroom Training in the Current Year

To create a filter to search for all completed classroom classes and programs in the current year:

1. Access the Learning Filter page.
2. Select Add a New Value and enter the name of the search filter.

   The Learning Filter page appears.
3. Enter the short description and the description for the search filter.
4. In the Enrollment Status group box, add the search conditions *Completed* and *Waived*.
5. In the Class and Program Delivery Methods group box, add *Classroom* to the list of search conditions.
6. In the Date Range From and To fields, enter *1 January 2006* and *31 December 2006.*
7. Click Save and access the My Learning, Team Learning, or Learner View page to use the search parameters you have defined.

Enabling Instant Messaging

This topic provides an overview of instant messaging, and discusses how to enable it.

Page Used to Enable Instant Messaging

Page Name	***Definition Name***	***Usage***
Configuration Page	MCF_IM_CFG_PG	Enable an instant messaging system and indicate the server IP address.

Understanding Instant Messaging

In addition to more standard means of communication, instructors, administrators, and learners can communicate via instant messaging. Enterprise Learning Management supports three instant messaging tools: Lotus Sametime Connect, AOL Instant Messenger, and Yahoo Instant Messenger.

When you use the instant messaging feature, learners can click a chat icon on the self-service Class Details page to initiate a chat session with an instructor, or click an icon on the self-service Program Details page to send an instant message to the program owner. Chat icons can also appear next to learner names on the Learner Information pages that administrators can access through the program and class rosters.

To activate instant messaging in Enterprise Learning Management:

1. Use the Configuration page available through PeopleSoft PeopleTools to enable instant messaging and select the supported instant messaging tools.

2. In Enterprise Learning Management, have users select their instant messaging settings on the Learning Preferences page.

   Each user should enter a user ID (screen name) and choose the preferred instant messaging tool. Only those tools enabled on the Configuration page are available for selection. Selecting the Enabled check box causes the chat icon to appear next to the user's name on pages that support instant messaging.

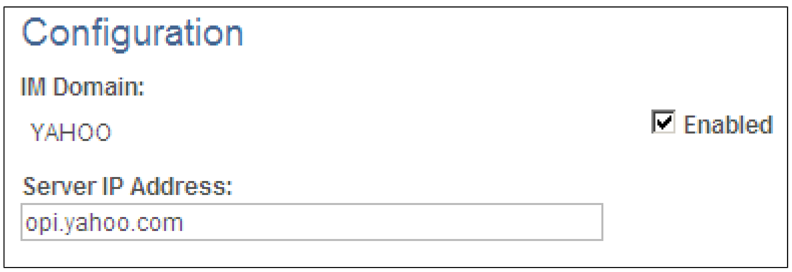
Configuration Page

Use the Configuration page (MCF_IM_CFG_PG) to enable an instant messaging system and indicate the server IP address.

Navigation:

PeopleTools > **MultiChannel Framework** > **Instant Messaging** > **Configuration** > **Configuration**

This example illustrates the fields and controls on the Configuration page.



Field or Control	***Description***
IM Domain(instant messaging domain)	The instant messaging service. Options are as follows: • *YAHOO*: Yahoo Instant Messenger • *AOL*: AOL Instant Messenger • *SAMETIME*: Lotus Sametime Connect
Server IP Address	Enter the address of the instant messaging server in the format `host.domain(:host)`.
Enable	Select to activate this instant messaging service.

See the product documentation for *PeopleTools: MultiChannel Framework*.

Defining Contact Preferences

This topic discusses how an ELM administrator can define the default email address for their ELM end users (employee, manager, external learner or an instructor).

Pages Used to Define Contact Preferences

This section discusses the pages used to define contact preferences.

Page Name	***Definition Name***	***Usage***
Define Contact Preferences Page	RUNCTL_EMLPREF	Run process to define default email address type for ELM users.

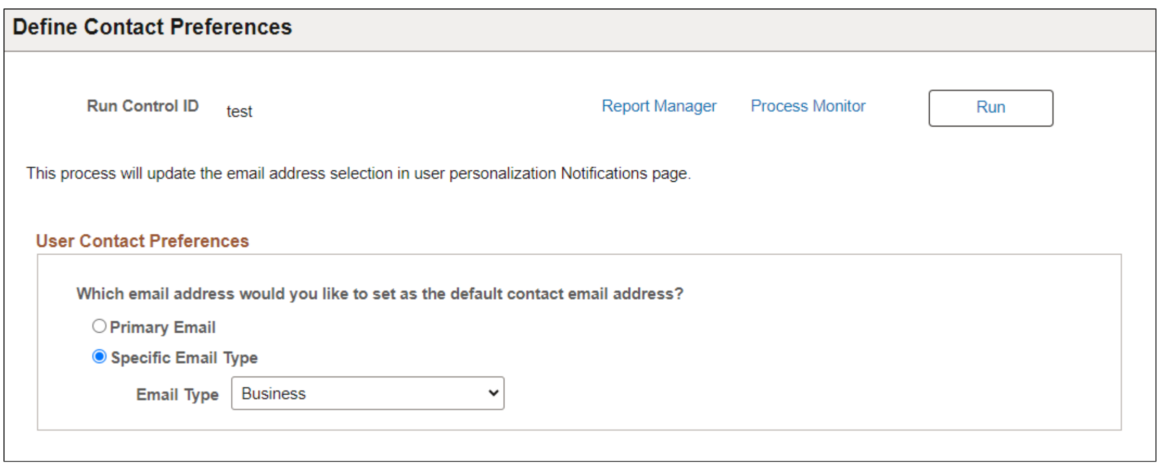
Define Contact Preferences Page

Use the Define Contact Preferences page (RUNCTL_EMLPREF) to run the process to define the default email address type for ELM users.

Navigation:

Set Up ELM > **System Administration** > **Utilities** > **Define Contact Preferences**

This example illustrates the fields and controls on the Define Contact Preferences page.



The ELM administrator can use this page to choose a preferred email address type and run the process to default the selected email address type in the My Preferences page for their ELM users (employee, manager, external learner or an instructor). For more information on My Preferences page, see *PeopleTools: Applications User's Guide*, "Personalizing Notifications", Defining User Preferences. The email address types available in this page vary based on the preferences defined in Install Defaults page. By default, this page displays the email address types available in the User Profile page. See *PeopleTools: Security Administration*, "Specifying User Profile Attributes", Setting General User Profile Attributes.

Chapter 3

Defining Learning Environments and Learner Groups

Understanding Learning Environments

Learning environments provide a way to create separate domains within the learning catalog. An administrator's learning environment controls which parts of the catalog she or he can view and update, as well as the default values and options that are associated with the objects (such as categories, courses, classes and programs) the administrator creates. For example, if Azmi Daud were an administrator in the Asia Pacific learning environment, Azmi would only be able to access, update, and add categories, items, and classes that are associated with the Asia Pacific learning environment. The rest of the catalog will be hidden when Azmi uses the catalog maintenance components listed under the Enterprise Learning, Catalog navigation path.

Learning environments also enable administrators to access the instructors and resources that are available for assignment.

Learning environments control some of the self-service options that are available to learners, such as the display of objectives and certification status on the user's home page.

Note: Learning environment values are assigned to both internal learners and administrators on the Job Data page.

See HR/Job Data Page.

When you create a learning environment, the system automatically creates a learner group with the same name for your convenience. This learner group automatically includes all learners that are in that learning environment. When you add new learners to the learning environment, the system automatically updates this learner group.

Every learner that is created in the system is automatically associated with one and only one learning environment. For internal learners, the system assigns each individual to the learning environment that is associated with their department. For external learners, the system defaults to the learning environment of the administrator who is creating the learner. You can change an internal or external learner's learning environment if needed. Categories, courses, classes, programs, resources, instructors, and learner groups are also associated with one or more learning environments.

Related Links

Learning Catalog

Administrators with Multiple Learning Environments

You can assign multiple learning administrators to a single learning environment and multiple learning environments to each learning administrator. When you assign an administrator to multiple learning environments, the administrator, in conjunction with the role security settings, can perform administrative functions such as managing the catalog, learners, and enrollments for all assigned learning environments. Assign learning administrators to a learning environment on the Learning Environments - Basic Data page.

Learning administrators must have a default learning environment or they cannot administer any learning environments. The system uses the default learning environment settings to populate default values throughout the system when the learning administrator creates new delivery methods, courses, and programs. When a learning administrator runs reports, only classes, programs, resources, or learners in the learning administrator's default learning environment are captured in the report. The system selects the first learning environment that you assign to a learning administrator as the default learning environment. Learning administrators can use the Set Learning Environment page to specify a new default learning environment.

When a learning administrator is assigned to two learning environments and you remove the administrator from the default learning environment, the system selects the remaining learning environment as the new default learning environment. When a learning administrator is assigned to more than two learning environments and you remove the administrator from the default learning environment, the learning administrator must select a new default learning environment on the Set Learning Environment page.

Learner groups control what the learner can see when searching the learning catalog. Although you can assign an administrator to multiple learning environments, the administrator sees only courses and programs in the learning catalog for the learner group to which the administrator belongs.

Understanding Learner Groups

This topic lists prerequisites and provides an overview of learner groups.

Learner groups are defined groups of learners that share some of the same learner attributes, such as the same department, region, or job code. Use learner groups to:

- Specify the courses, classes, and programs a learner can access through the catalog.
- Perform group or mass enrollment.
- Assign objectives to a group of learners.
- Specify the types of supplemental learning a learner can report.

Learner Group Assignment and Security

One of the primary functions of learner groups is to control access to the learning catalog. For a user to access a particular learning item in the catalog, the user must belong to a learner group that is associated with that learning item.

When an administrator defines a category, the category inherits the administrator's primary learning environment. The learning environment controls which learner groups the administrator can associate with that category. Similarly, when an administrator defines a course, the course inherits the administrator's primary learning environment, which determines the learner groups the administrator can associate with that course. When an administrator defines a class, he or she has the option of clicking a button that automatically defaults all learner groups from the course that are associated with the class's learning environment. For example, William Lee, the learning administrator for the North America learning environment, creates a new class. The class inherits the North America learning environment. William has the option of clicking a button to assign to the class all North America learner groups that are associated with the course. He can further restrict access to the class; but he cannot expand access by adding learner groups that are not associated with the course.

Types of Learner Groups

Enterprise Learning Management supports the following types of learner groups:

- Criteria-based

  Create criteria-based learner groups by selecting the attributes that users must have to belong to the group. Choose from a set of eight criteria, using and/or logic to define membership eligibility. Use the Learner Group component to create criteria-based learner groups.

- Query-based

  To create a query-based group, you select a predefined SQL query, such as Job Code and State, and specify the values to use when the query is run. Use the Learner Group component to create query-based learner groups.

  Unlike criteria-based learner groups, query-based learner groups can be built using almost any combination of attributes in PeopleSoft Enterprise Learning Management. You can use the delivered queries or create your own using PeopleSoft Query Analyzer.

- Virtual

  These groups are formed by using and/or logic to combine existing criteria-based and query-based learner groups. You can form these groups when you define security for a category, course, class, or program. There is no separate setup component for virtual learner groups. The ability to use virtual learner groups can greatly reduce the number of criteria-based and query-based learner groups you need to create and maintain.

- System-created and maintained

  A specific class of system-created and maintained learner groups correspond to learning environments. When you define a learning environment, the system automatically generates a learner group with the same name. Each time that you associate learners with the learning environment, the system automatically adds these learners to the corresponding, system-generated learner group. System-generated learner groups are not accessible through the Learner Groups component.

Criteria-based and query-based learner groups differ only in how the group members are generated. Both can be used for enrollment and security purposes. Virtual learner groups and system-created and maintained learner groups are used for security purposes only.

Manually-Maintained or Automatically-Maintained Membership

When you define a criteria-based or query-based learner group, you can specify whether you want the membership to be updated manually or automatically. You cannot manually add and remove members from automatically-maintained groups.

The system refreshes membership for automatically-maintained learner groups when you run the Build Learner Group process (LM_LRNRGR_AE). This is a batch process that you should set up to run on a nightly basis or at some other frequency.

Related Links

Defining Learning Environments

Prerequisites

Before you can create learner groups, you must:

- Define learning environments.

  See Defining Learning Environments.

- Import people, departments, and job codes through EIPs.

  See Understanding Person and Organization EIPs.

Defining Learning Environments

To define learning environments, use the Learning Environments (LM_LE_CMP) component.

Pages Used to Create Learning Environments

Page Name	*Definition Name*	*Usage*
Learning Environment - Basic Data Page	LM_LE_PG	Enter the name, status, and a description of the learning environment.
Learning Environments - Security Page	LM_LE_REL_PG	Displays the categories and courses for a particular learning environment. This page becomes accessible after you save the definition of a new learning environment.
Learning Environment - Defaults Page	LM_LE_DFLT_PG	Define default values for classes and programs that are created for a particular learning environment.

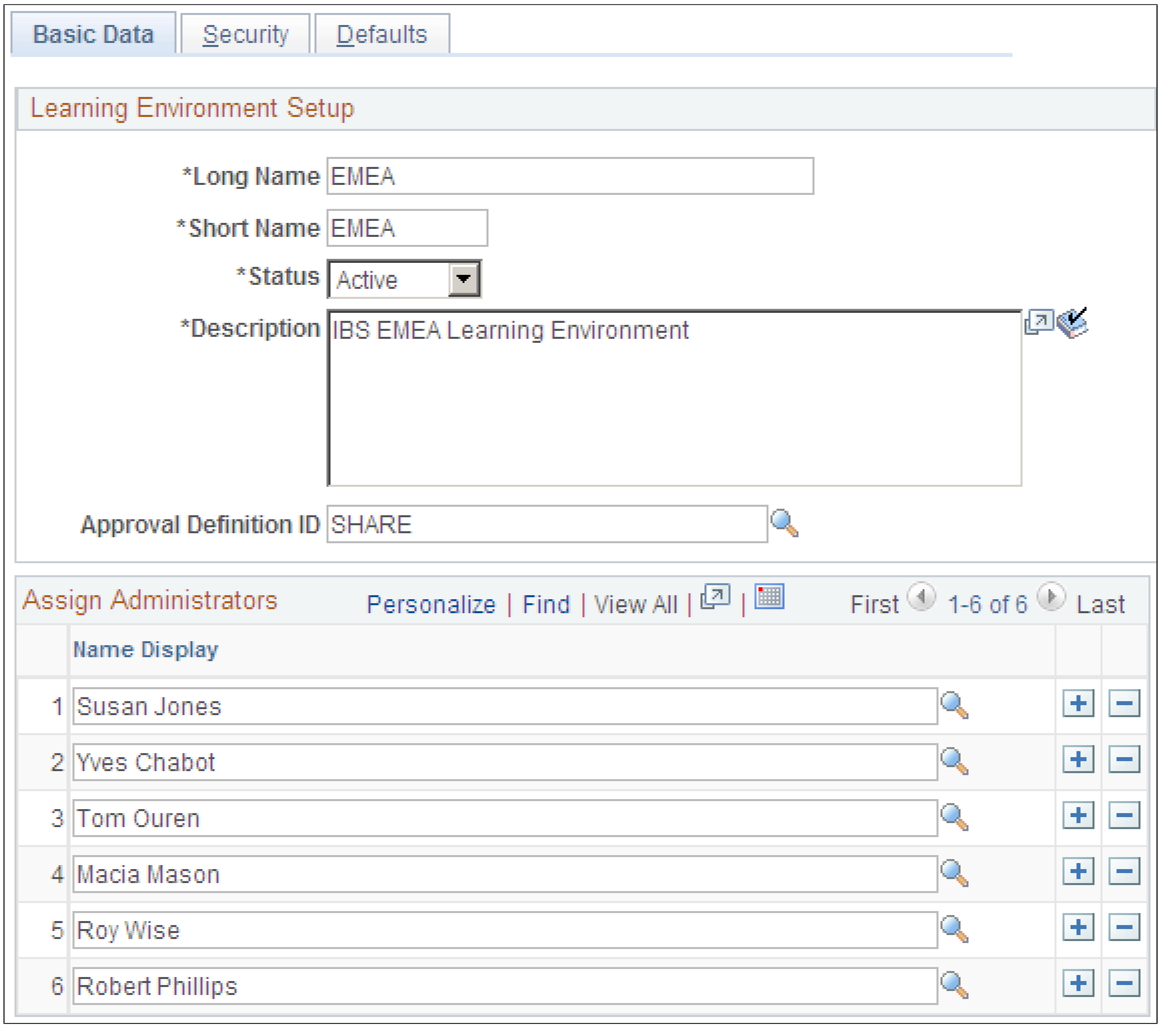
Learning Environment - Basic Data Page

Use the Learning Environment - Basic Data page (LM_LE_PG) to enter the name, status, and a description of the learning environment.

Navigation:

Set Up ELM > **Learning Environment** > **Basic Data**

This example illustrates the fields and controls on the Learning Environment - Basic Data page.



Field or Control	***Description***
Approval Definition ID	The SetID entered here links the learning environment to the approval process definitions that are available for the environment. See Understanding the Approval Framework.

Assign Administrators

Field or Control	***Description***
Name Display	Specify the administrators for this learning environment.

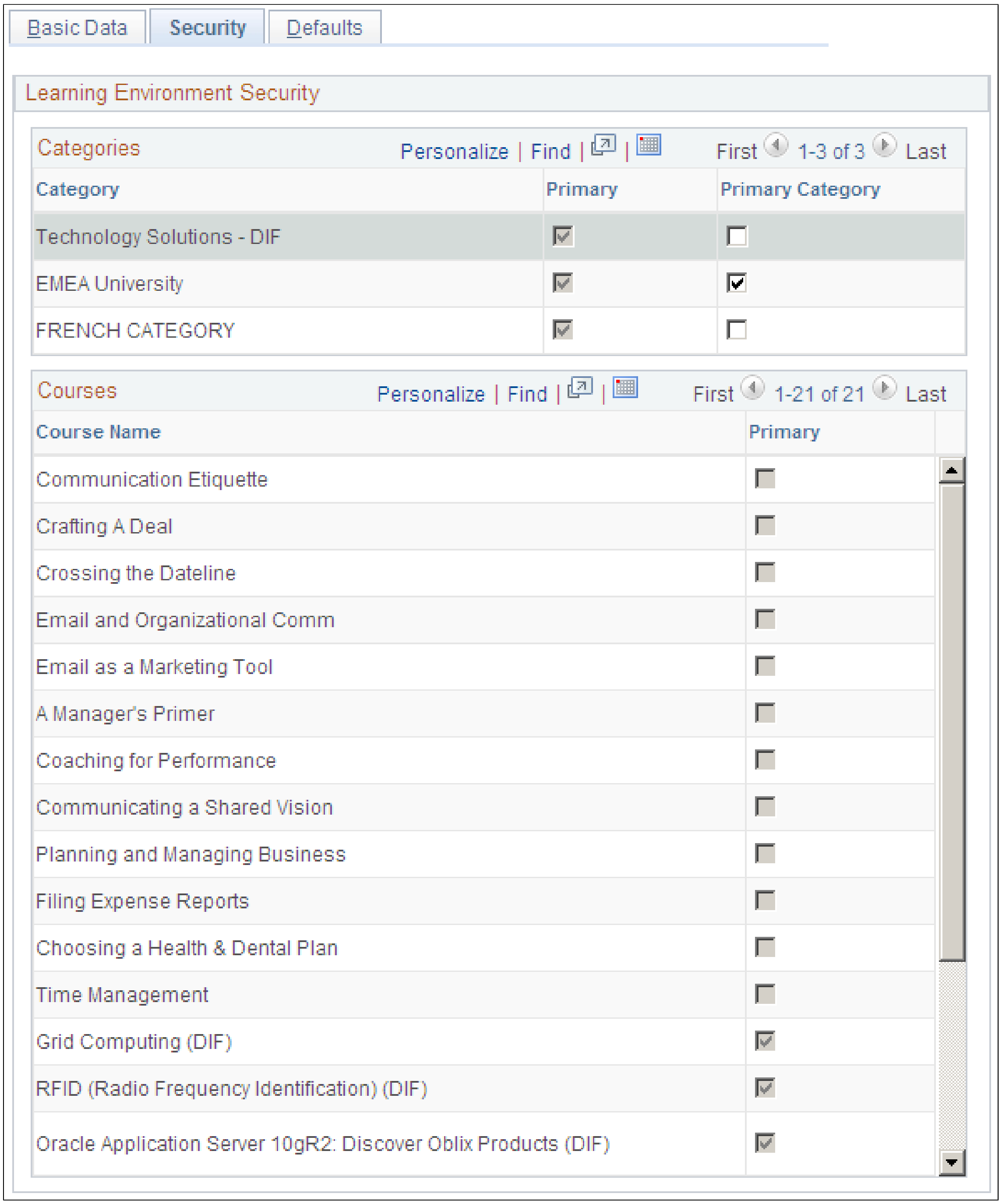
Learning Environments - Security Page

Use the Learning Environment - Security page (LM_LE_REL_PG) to displays the categories and courses for a particular learning environment. This page becomes accessible after you save the definition of a new learning environment.

Navigation:

Set Up ELM > **Learning Environment** > **Security**

This example illustrates the fields and controls on the Learning Environments - Security page.



Categories

Categories provide a way to organize the catalog so that users can more easily search for classes.

Field or Control	*Description*
Primary	If selected, this learning environment has been designated as the primary learning environment for the category on the Maintain Categories - Security page.

Courses

Courses identify specific topics of study. This section of the page displays the courses that have been associated with this learning environment through the Maintain Courses component.

Field or Control	*Description*
Primary	If selected, this learning environment has been designated as the primary learning environment for the listed course, as set on the Security tab of the Course Details page.

Related Links

Maintain Categories - Relationships Page
Course Details: Security Page

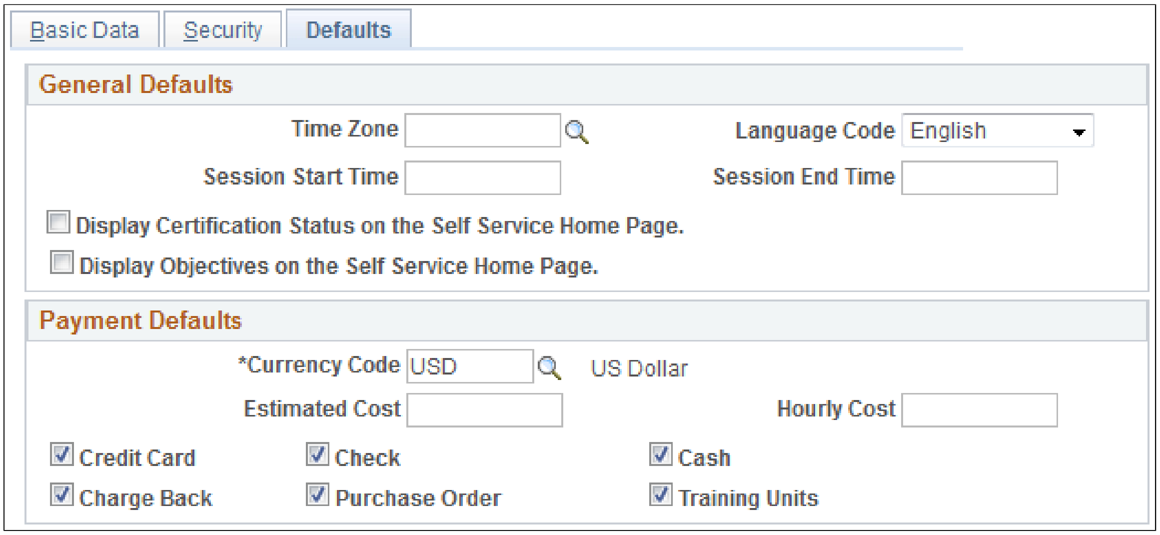
Learning Environment - Defaults Page

Use the Learning Environment - Defaults page (LM_LE_DFLT_PG) to define default values for classes and programs that are created for a particular learning environment.

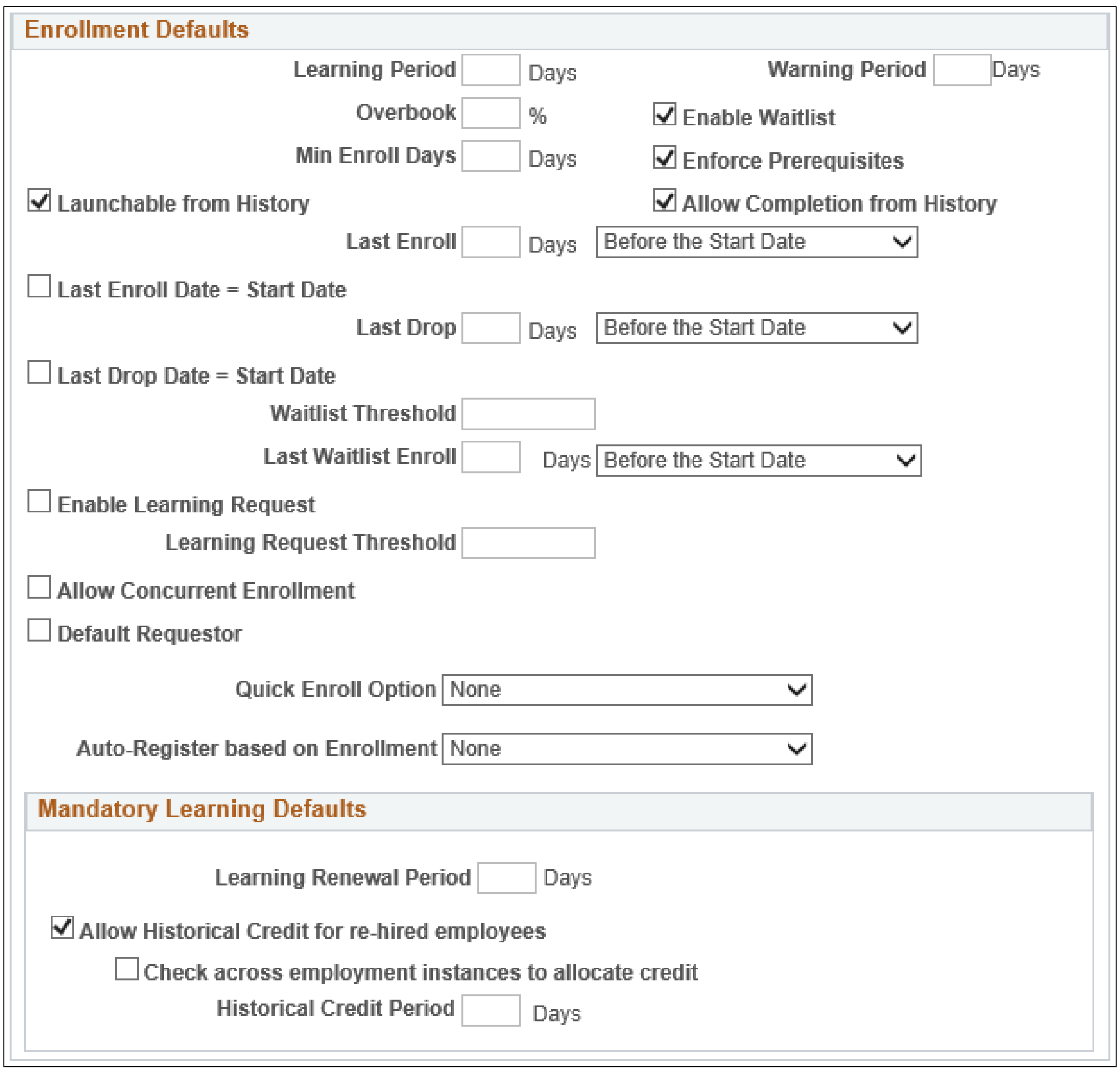
Navigation:

Set Up ELM > Learning Environment > Defaults

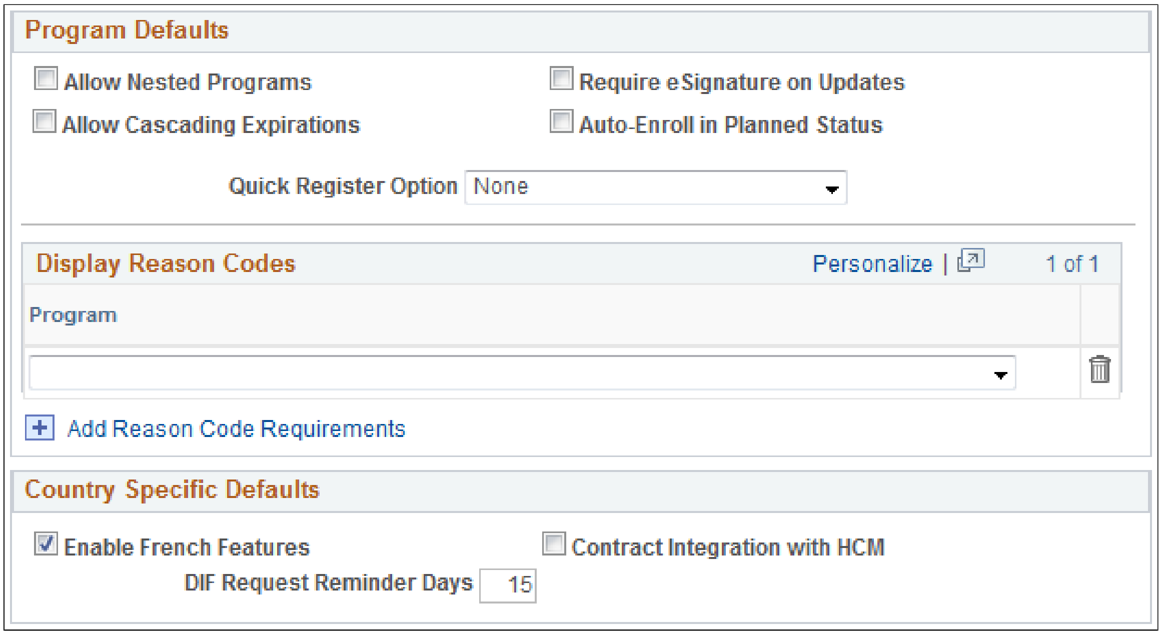
This example illustrates the fields and controls on the Learning Environments - Defaults page (1 of 3).



This example illustrates the fields and controls on the Learning Environments - Defaults page (2 of 3).



This example illustrates the fields and controls on the Learning Environments - Defaults page (3 of 3).



The first time that you access this page, the system displays the values entered on the Install Defaults component and the Payment Methods page. You can override any of the displayed values.

When an administrator who is associated with this learning environment creates classes, the classes can inherit default options and values that you define on this page.

General Defaults

Field or Control	*Description*
Time Zone	This field applies to scheduled classes only. Select the default time zone for class scheduling. The system uses the value you select here as the default for session patterns and sessions in this learning environment.
Language Code	Select the default language for classes. The system displays as a default the value set on the Install Defaults - General page. The system uses the value you select here as the default for delivery methods of a class.
Session Start Time and **Session End Time**	These fields apply to scheduled classes only. Enter the default start time and end time of classes. You can override this time at the class level.

Field or Control	***Description***
Display Certification Status on the Self Service Home Page	Select to have certification programs with a status of complete, expired, or warning display in a separate grid labeled My Certification Status on the self-service My Learning page. The system will display the program name, status, date, and a Recertify button. An administrator can override this value at the learning environment level.
Display Objectives on the Self Service Home Page	Select to have objectives with a status of needed or in progress appear in a separate grid on the My Learning page. The My Learning Objectives grid can display up to five objectives, and lists each objective's name, proficiency, status, target completion date, who assigned the objective, and the associated class or program. An administrator can override this value at the learning environment level.

Payment Defaults

Use this group box to specify the default currency code that applies to the fees and costs associated with classes and programs within this learning environment, and to select the valid payment methods for the learning environment. The options selected by default are inherited from system default settings. The default currency is inherited from the Install Defaults - General page. The default payment methods are inherited from the Install Default Payment Methods page. You can modify all options here. The payment methods selected on this page default to the Payment Information page in the Define Customers component, where you can modify them again.

Field or Control	***Description***
Estimated Cost	This field pertains to training plan budget reports. Enter the estimated cost, per learner, of delivering a class. When you generate a training plan that includes classes for which no estimated hourly amount is defined, the system can use this value to determine the forecasted cost for the class. You can override this value at the course and delivery method levels.
Hourly Cost	This field pertains to training plan budget reports. Enter the estimated hourly cost, per learner, of delivering a class. When you generate a training plan, the system can use this value to determine the forecasted cost for a class based on the hours defined for each of the class's components on the Recommended Duration page. You can override this value at the delivery method level.

Enrollment Defaults

Field or Control	***Description***
Learning Period	Enter the number of days after the enrollment date learners have to complete a class. The system uses the value you enter here as a default value on the Delivery Method page.
Warning Period	Enter the number of days before the end of the learning period that you want the system to send an email notification to the learner expressing that the learning period is about to expire. The system uses the value you enter here as a default value on the Delivery Method page.
Overbook	Enter the percentage above the maximum enrollment value for which you will allow enrollment. The overbook value, multiplied by the maximum enrollment number, is the total number of enrollments that the system accepts before the waitlist status is assigned to a learner who tries to enroll in a class. The system uses the value that you enter here as a default on the Class Details page.
Enable Waitlist	Select if you want the system to accept waitlisted learners for a class when the maximum enrollment number has been reached. If overbooking is permitted, the system does not waitlist learners until the overbook percentage is reached. The system uses your selection as a default value on the Delivery Method page.
Min Enroll Days (minimum enrollment days)	Enter the number of days before a class start date that you want the minimum enrollment notification sent to the enrollment administrator and class owner to alert them that the minimum enrollment has not been reached. A scheduled PeopleSoft Application Engine process (LM_ACT_MINEN) performs this notification. This notification gives the class administrator and owner the opportunity to cancel a specific class due to low enrollment. The system uses the value that you enter here as a default on the Class Details page. See Understanding Class Notifications.
Enforce Prerequisites	Select if you want the enrollment process to obey required class and program prerequisites. Deselect this check box to waive the prerequisites for all learners. Even if this check box is selected, the learning administrator can still waive prerequisites for individual learners. The system uses your selection as a default value on the Class Details page.

Field or Control	*Description*
Launchable from History	Select if you want the links associated with web-based, test, or survey learning components to be launchable from the learner's My Learning page after the class achieves a completion status of *Completed* or *Not Completed.* You can override this value at the delivery method and class levels. **Note:** You must select this check box if you select **Allow Completion from History.**
Allow Completion from History	Select if you want learners to be able to complete classes that have web-based, test, or survey learning components after the class achieves a completion status of Completed or Not Completed. For example, if a learner does not pass or complete a class the first time through he or she can return later to try to complete it from the My Learning page. If the **Launchable from History** check box is selected and this check box is cleared, then learners can launch the content but their progress will not be updated and no changes will be made to the class's completion or passing status. You can override this value at the delivery method and class levels. **Note:** If you select this check box, be sure to also select the **Launchable from History** check box.
Last Enroll (last enrollment)	Enter the number of days *Before the Start Date* or *After the Start Date* to indicate the last day enrollment is permitted. This is useful, for instance, when you want to close enrollment to accommodate the ordering of materials for the class. The system uses the value that you enter here as a default on the Class Details page. Alternatively, you can select the **Last Enroll Date = Start Date** check box.
Last Enroll Date = Start Date	Select if you want the last day learners can enroll in a class to equal the class start date. The system uses the value that you enter here as a default on the Class Details page.
Last Drop	Enter the number of days *Before the Start Date* or *After the Enrollment Date* that a learner can drop the class without paying the drop fee. Alternatively, you can select the **Last Drop Date = Start Date** check box. The system uses the value that you enter here as a default on the Class Details page.

Field or Control	***Description***
Last Drop Date = Start Date	Select if you want the last day learners can drop a class without having to pay a drop fee to equal the class start date. The system uses the value that you enter here as a default on the Class Details page.
Waitlist Threshold	Enter the number of waitlisted learners that will cause a notification to be generated to the administrator. (You must run the waitlist threshold process (LM_WLT_TRHLD) to produce the notifications.)
Last Waitlist Enroll	Enter the number of days *Before the Start Date* or *After the Enrollment Date* that the system no longer automatically enrolls waitlisted learners when an enrolled learner drops a class. The system uses this value to determine the default value of the Last Waitlist Enroll Date field on the Maintain Classes - Class Details page. You can edit this value at the class level.
Enable Learning Request	Select to enable users to enter learning requests for courses that are associated with this learning environment. You can override this value at the course level.
Learning Request Threshold	Enter the number of learning requests for a specific course that will cause a notification to be generated to the administrator. (You must run the learning requests threshold process (LM_LRQ_TRHLD_NOTIF) to produce the notifications.) See Generating Notifications for Learning Requests.
Allow Concurrent Enrollment	If selected and the enforce prerequisites feature is activated for a class, learners who do not meet a class's required prerequisites at the time of enrollment can proceed with the enrollment process, provided they are currently enrolled in the prerequisites.
Default Requestor	Select this field to prevent the Select Requester page from displaying when an administrator uses the group or mass enrollment feature. The system assumes that the administrator is the requester.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Quick Enroll Option</td><td>Specify how you want to streamline class enrollment for learners associated with the learning environment. Values are:

• None: Select if you want the Review Information and Enrollment Confirmation pages to display as normal during learner enrollment through the Find Learning component.

• Suppress Review & Confirmation: Select to suppress both the Review Information and Review Information (confirmation) pages during learner enrollment through the Find Learning component.

When you select this value, learners who click the Enroll button on the Find Learning page go directly to the Class Progress page for the class in which they've just enrolled.

• Suppress Review Information: Select to suppress only the Review Information page during learner enrollment through the Find Learning component.

Note: If an enrollment requires additional input, such as payment information, or if there is a problem with the enrollment, such as prerequisites not met, the system does not suppress the Review Information page and it appears normally.

Note: This setting applies to enrollment through the Find Learning component accessed through the Self Service menu only. It does not affect the pages that are displayed during enrollment using the Enroll Learners component, nor does it affect the pages that are displayed when a manager accesses the Find Learning component through the Manager Self Service menu. For more information on the Find Learning component, see Using the Learning Catalog. For more information on the Enroll Learners component, see Understanding Enrollment and Registration.</td></tr>
</table>

Field or Control	Description
Auto-Register based on Enrollment	Specify how you want the system to automatically register learners in programs associated with the classes in which they enroll. Values are: • *All Programs:* Select to enable the system to automatically register in both certification and curriculum programs when learners enroll in classes associated with the programs. Users do not receive a confirmation message before the system performs the automatic registration. When this value is selected, the Auto-Register based on Enrollment check box appears on the Maintain Programs - Details page for both certification and curriculum programs. • *All Programs with Confirm:* Select to enable the system to automatically register in both certification and curriculum programs when learners enroll in classes associated with the programs. After submitting a class enrollment, users access the Associated Programs modal page, which displays all of the associated programs that can be automatically registered. Users can select one or more programs in which to automatically register. When this value is selected, the Auto-Register based on Enrollment check box appears on the Maintain Programs - Details page for both certification and curriculum programs. • *Certifications Only:* Select to enable the system to automatically register in certification programs when learners enroll in classes associated with the certification programs. Users do not receive a confirmation message before the system performs the automatic registration. When this value is selected, the Auto-Register based on Enrollment check box appears on the Maintain Programs - Details page for certification programs only. • *Certifications with Confirm:* Select to enable the system to automatically register in certification programs when learners enroll in classes associated with the certification programs. After submitting a class enrollment, users access the Associated Programs modal page, which displays all of the associated certification programs that can be automatically registered. Users can select one or more programs in which to automatically register.

Field or Control	Description
	When this value is selected, the Auto-Register based on Enrollment check box appears on the Maintain Programs - Details page for certification programs only. • *Curricula Only:* Select to enable the system to automatically register in curriculum programs when learners enroll in classes associated with the curriculum programs. Users do not receive a confirmation message before the system performs the automatic registration. When this value is selected, the Auto-Register based on Enrollment check box appears on the Maintain Programs - Details page for curriculum programs only. • *Curricula with Confirm:* Select to enable the system to automatically register in curriculum programs when learners enroll in classes associated with the curriculum programs. After submitting a class enrollment, users access the Associated Programs modal page, which displays all of the associated curriculum programs that can be automatically registered. Users can select one or more programs in which to automatically register. When this value is selected, the Auto-Register based on Enrollment check box appears on the Maintain Programs - Details page for curriculum programs only. • *None:* Select to disable automatic program registration. When this value is selected, the Auto-Register based on Enrollment check box does not appear on the Maintain Programs - Details page for any programs. **Note:** Launching and enrolling in a class simultaneously using the Launch button does not trigger automatic registration, regardless of this setting.

Mandatory Learning Defaults

Field or Control	Description
Learning Renewal Period	Enter the number of days after which the class has to be renewed. The system uses the value you enter here as a default value on the Mandatory Learning Setup page.

Field or Control	*Description*
Allow Historical Credit for re-hired employees	Select if you want re-hired employees to be given credit for classes taken during a previous employment instance with the company.
Check across employment instances to allocate credit	**Note:** This check box is displayed only when the 'Allow Historical Credit for re-hired employees' check box is selected. Select to let the system check across multiple employment instances before allocating credit for classes included in the Mandatory Learning.
Historical Credit Period	Enter the number of days within which historical credit can be allocated for re-hired employees.

Program Defaults

Field or Control	*Description*
Allow Nested Programs	Select to enable the inclusion of programs within other programs.
Require eSignature on Updates	Select to enable administrators to activate the eSignature sign-off feature for a program. When the eSignature feature is activated, administrators must enter their password when manually updating a learner's status.
Allow Cascading Expirations	Select to enable administrators to define different expiration rules for each section of a certification program. If this check box is cleared, administrators can only define one set of expiration rules for the entire program.
Auto-Enroll in Planned Status	Select to enable the automatic addition of courses to learning plans upon program registration by learners associated with this learning environment. If this check box is selected, and no active classes are available for automatic enrollment upon program registration, the system adds the associated course to the learner's default learning plan.

Field or Control	***Description***
Quick Register Option	Specify how you want to streamline program registration for learners associated with the learning environment. Values are: • *None:* Select if you want the Review Information and Registration Confirmation pages to display as normal during learner registration through the Find Learning component. • *Suppress Review & Confirmation:* Select to suppress both the Review Information and Registration Confirmation pages during learner registration through the Find Learning component. When you select this value, learners who click the Register button on the Find Learning page go directly to the <Program> Progress page for the program for which they've just registered. • *Suppress Review Information:* Select to suppress only the Review Information page during learner registration through the Find Learning component. **Note:** If a registration requires additional input, such as payment information, or if there is a problem with the registration, such as prerequisites not met, the system does not suppress the Review Information page and it appears normally. **Note:** This setting applies to registration through the Find Learning component accessed through the Self Service menu only. It does not affect the pages that are displayed during registration using the Enroll Learners component, nor does it affect the pages that are displayed when a manager accesses the Find Learning component through the Manager Self Service menu. For more information on the Find Learning component, see Using the Learning Catalog. For more information on the Enroll Learners component, see Understanding Enrollment and Registration.

Display Reason Codes

You can enable administrators to select a reason code when they make certain updates to a learner's certification status through the program roster. Identify the statuses for which administrators can select a reason code. Values are *Completed, Denied, Dropped, Expired, In Progress, Not Completed, Pending Approval, Pending Payment, Planned, Registered, Reissue, Revoked, Waived,* and *Warning.*

Country Specific Defaults

Field or Control	*Description*
(FRA) Enable French Features	Select to display French-related fields on the pages that are associated with this learning environment.
(FRA) Contract Integration with HCM	Select if contracts for French employees are maintained within your current HCM system. This ensures that all contract information in ELM is imported from HCM and is read-only within ELM. This keeps HCM as the system of record. When this check box is selected for a learning environment, the Contracts page of the Internal Learners component cannot be edited for learners associated with the learning environment. You can send contract information from HCM to ELM using the PERSON_CONTRACT_FULLSYNC message and send incremental updates using the PERSON_CONTRACT_SYNC message.
(FRA) DIF Request Reminder Days (Droit Individuel à la Formation request reminder days)	Enter the number of days after an initial DIF request is submitted that the system issues a notification to the DIF request approver when you run the Send DIF Request Reminders (LM_DIF_RMNDR) process.

Related Links

Defining Default Processing Rules and Options
DIF Request Notifications Page

Setting the Current Learning Environment

This topic describes how an administrator with multiple learning environments selects the current learning environment.

Page Used to Set the Default Learning Environment

Page Name	*Definition Name*	*Usage*
Set Learning Environment Page	LM_ADMIN	Select the administrator's current learning environment.

Related Links

Defining Learning Environments

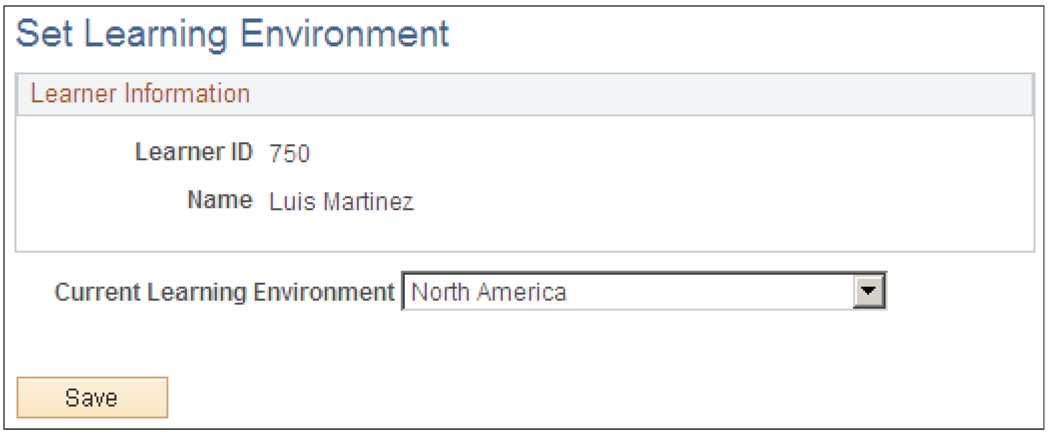
Set Learning Environment Page

Use the Set Learning Environment page (LM_ADMIN) to select the administrator's current learning environment.

Navigation:

Enterprise Learning > **Set Learning Environment** > **Set Learning Environment**

This example illustrates the fields and controls on the Set Learning Environment page.



Use the Current Learning Environment field to select the learning environment that you want to work in. You can select from any learning environment that has been assigned to you through the Learning Environment - Basic Data page. Your current learning environment controls which parts of the catalog you can access, the default values that are displayed when you add learning to the catalog, and other features.

Building Learner Groups

This topic discusses how to build learner groups.

Pages Used to Build Learner Groups

Page Name	***Definition Name***	***Usage***
Maintain Queries Page	LM_LG_QUERY	Associate learner group query technical names with user-friendly names.
Maintain Learner Groups Page	LM_LG_SEARCH	Search for or define new learner groups.

Page Name	***Definition Name***	***Usage***
Learner Page	LM_LRNR_GROUPS	Define learner group data by associating the learner group with a learning environment and owner.
Group Page	LM_LRNR_CRIT	Select the criteria or query for your learner group and build the group.
Category Page	LM_CATG_LG_USAGE	Review the categories for which this learner group is used.
Course Page	LM_CI_LG_USAGE	Review the courses for which this learner group is used.
Class Page	LM_ACT_LG_USAGE	Review the classes for which this learner group is used.
Program Page	LM_PROG_LG_USAGE	Review the programs for which this learner group is used.
Supplemental Page	LM_ADHC_LG_USAGE	Review the supplemental learning types for which this learner group is used.

Understanding Learner Group Setup

An overview of the procedures for defining criteria-based learner group and query-based learner groups follows, along procedures for modifying and deleting learner groups.

Defining a Criteria-Based Learner Group

To define a criteria-based learner group:

1. Access the Maintain Learner Groups page.
2. Click the link to Add Criteria Based Learner Group.
3. On the Learner page, enter a learner group name and short description, and associate the learner group with a learning environment, owner, and status.

   Also indicate if you want the system to automatically maintain group membership.
4. On the Group page, enter the types of criteria that you want to use to build your learner group.

   Criteria types are delivered; do not edit or delete the delivered criteria.
5. Specify the value for each criteria type.
6. Click the **Populate Learner Group** button to build the learner group.

Note: To achieve optimal performance when creating learner groups that may contain 1000 or more learners, it is recommended that you use the Populate Learner Group component to run a process to build the group (rather than clicking the Populate Learner Groups button). If you choose this option, save the learner group criteria before closing the page.

See Populating Learner Groups Through Batch Processing.

7. Review the selected members in the **Group Members** group box.

Creating a Query-Based Learner Group

To create a query-based learner group:

1. Access the Maintain Learner Groups page.
2. Click the link to Add Query Based Learner Group.
3. On the Learner page, enter a learner group name and short description, and associate the learner group with a learning environment, owner, and status.

   Also indicate if you want the system to automatically maintain group membership. Enter the refresh period, if applicable.
4. On the Group page, select the query to use to find the group members.
5. Click the **Populate Learner Group** button.

   If the query requires prompt values (for a particular department ID or job code, for example) the system displays a page where you can enter those values. The values are saved so that you can update the learner group through a batch process later on.

Note: To achieve optimal performance when creating learner groups that may contain 1000 or more learners, and that do not require prompt values, it is recommended that you use the Populate Learner Group component to run a process to build the group (rather than clicking the Populate Learner Groups button). If you choose this option, save the learner group criteria before closing the page.

See Populating Learner Groups Through Batch Processing.

6. Review the selected members in the **Group Members** group box.

Modifying and Deleting Learner Groups

To modify or delete an existing learner group:

1. Access the Maintain Learner Groups page.
2. Enter the search criteria and click Search.
3. To modify a group, click the group name to access the Learner Group component for that group.
4. To delete a group, select the check box for the group and click the Delete button.

   You can only delete groups that are not in use.

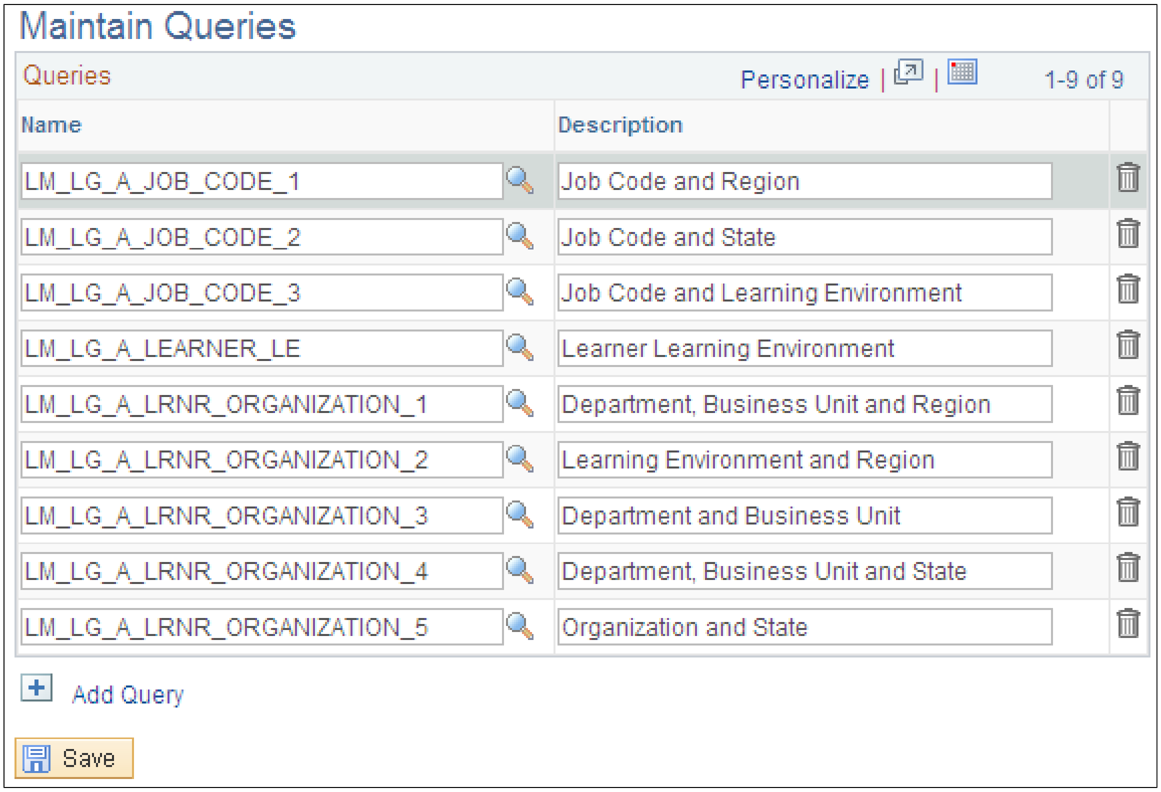
Maintain Queries Page

Use the Maintain Queries page (LM_LG_QUERY) to associate learner group query technical names with user-friendly names.

Navigation:

Enterprise Learning > **Learner Groups** > **Maintain Queries** > **Maintain Queries**

This example illustrates the fields and controls on the Maintain Queries page.



Enterprise Learning Management delivers many predefined queries, each beginning with the prefix LM_. To use any of these queries, be sure they appear on the Maintain Learner Group Queries page. You can also add your own user-defined queries here.

You can associate the technical query name with a friendlier description. The description appears in the list of queries from which users can select on the Group page when defining a learner group.

Related Links

Learner Organization Queries

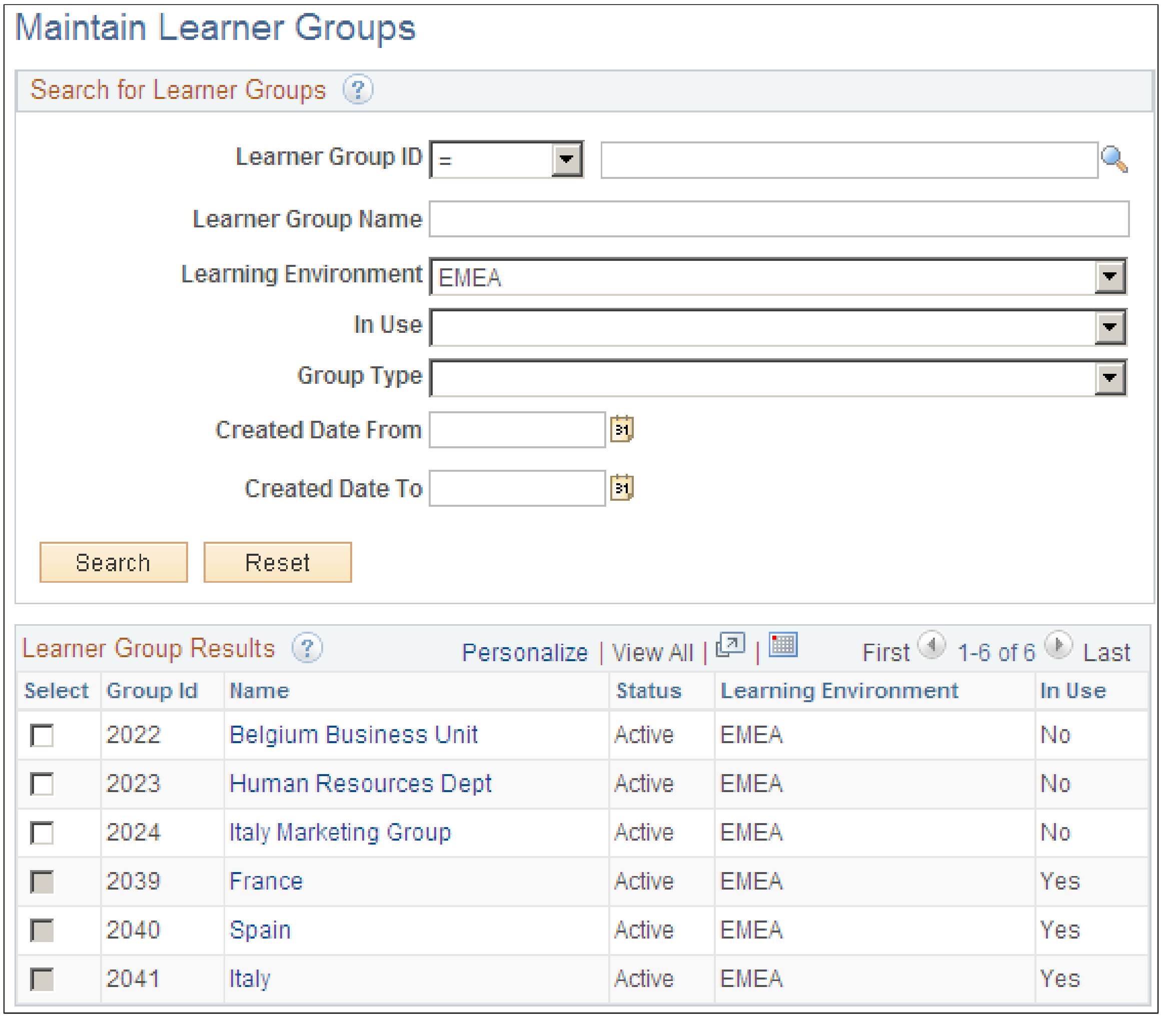
Maintain Learner Groups Page

Use the Maintain Learner Groups page (LM_LG_SEARCH) to search for or define new learner groups.

Navigation:

Enterprise Learning > **Learner Groups** > **Maintain Learner Groups** > **Maintain Learner Groups**

This example illustrates the fields and controls on the Maintain Learner Groups page.



Search for Learner Groups

Specify search criteria to find learner groups.

Field or Control	***Description***
In Use	Select *Yes* to find learner groups that are associated with a category, course, class, program, or supplemental learning type.
Group Type	Choose from *Automatically Maintained* or *Manually Maintained.*
Add Criteria Based Learner Group	Click to create a new learner group with group members based on specified criteria, such as department or job code.

Field or Control	***Description***
Add Query Based Learner Group	Click to create a new learner group with group members based on a query.
Delete	You can delete groups that are not currently marked as In Use by selecting the group and clicking this button.

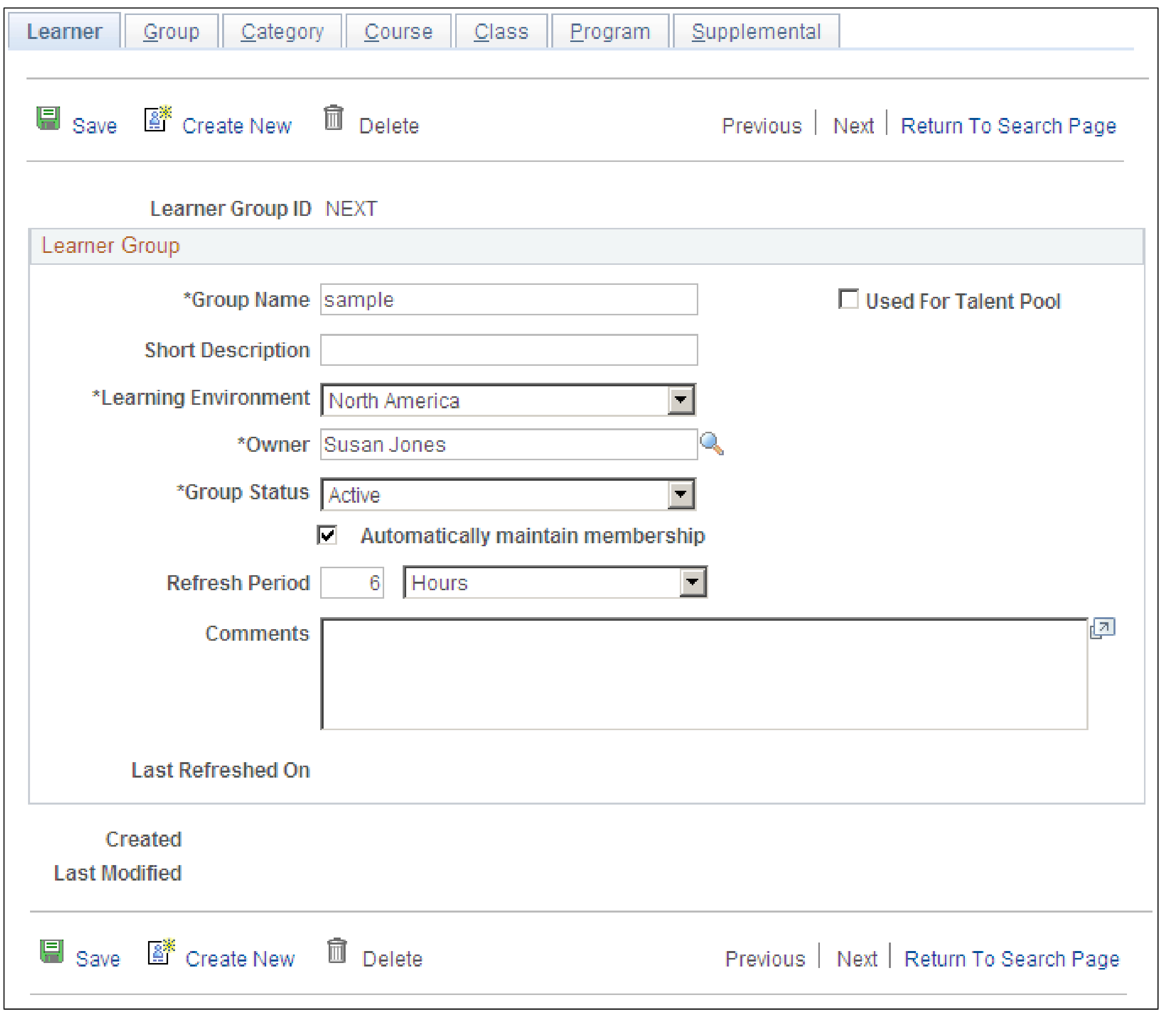
Learner Page

Use the Learner page (LM_LRNR_GROUPS) to define learner group data by associating the learner group with a learning environment and owner.

Navigation:

Click the **Add Criteria Based Learner Group** link or the **Add Query Based Learner Group** link on the Maintain Learner Groups page.

This example illustrates the fields and controls on the Learner page.



Field or Control	***Description***
Learner Group ID	Automatically generated by the system.
Group Name	Enter a name for the learner group.
Used for Talent Pool	Select to send all active learning programs associated with the learner group to PeopleSoft HR: Plan Career and Successions for use with talent pools using the full sync message, ELM_PROGRAM_FULLSYNC. In addition, the system sends any changes to the status of learner groups with this check box selected to PeopleSoft HR: Plan Career and Successions using the incremental sync message, ELM_PROGRAM_SYNC. **Note:** You must set up the integration between PeopleSoft Enterprise Learning Management and PeopleSoft HCM: Human Resources Plan Career and Successions using Integration Broker to enable this messaging. See the product documentation for *PeopleSoft HCM: Human Resources Plan Careers and Successions*. See the product documentation for *PeopleTools: Integration Broker Service Operations Monitor*.
Learning Environment	Select a learning environment to associate with the learner group.
Owner	The **Owner** field is for documentation purposes only. This field has no code attached to it.
Group Status	Select *Inactive* while developing a new learner group or for groups no longer in use. Select *Active* when the group is ready for use.
Automatically Maintain Membership	If selected, group membership will be updated automatically whenever you run the Build Learner Group process (LM_LRNRGR_AE), and you will be unable to manually add or delete members. If the check box is cleared and you manually add a learner before saving the definition, the check box becomes unavailable and the group becomes a manually maintained group. **Note:** You cannot change this selection after you save the learner group.

Field or Control	***Description***
Refresh Period	This field applies only to query-based learner groups and appears when you select the **Automatically Maintain Membership** check box. Enter the refresh frequency for group membership. Enter a numeric value in the first field; select *Days, Hours,* or *Minutes* in the second field. After you save the learner group definition, use the Populate Learner Group component to schedule the process to run at the same frequency defined here.

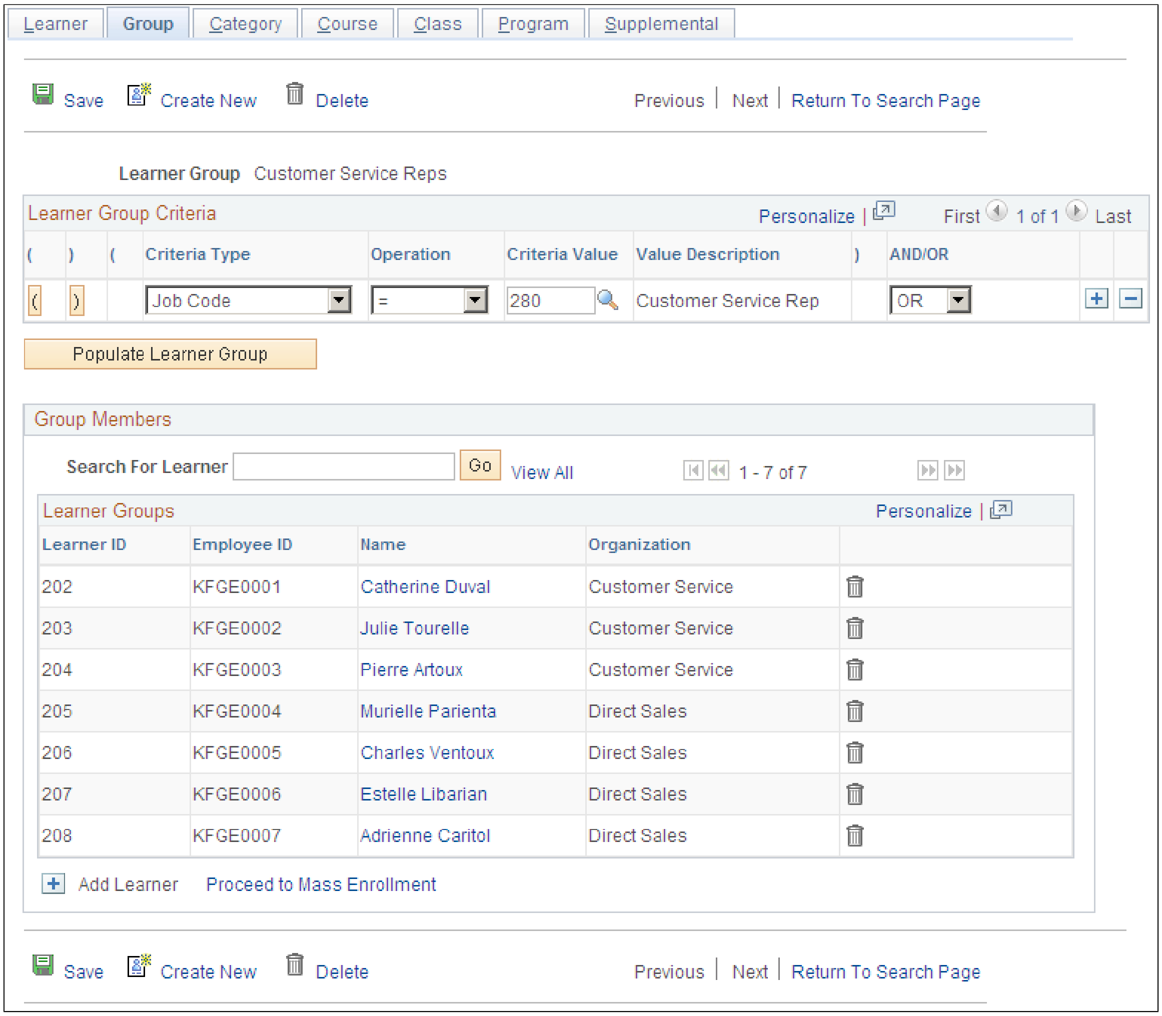
Group Page

Use the Group page (LM_LRNR_CRIT) to select the criteria or query for your learner group and build the group.

Navigation:

Click the **Add Criteria Based Learner Group** link or the **Add Query Based Learner Group** link on the Maintain Learner Groups page.

This example illustrates the fields and controls on the Group page.



Note: Fields that appear on the Group page vary depending on whether you are defining a criteria-based learner group or a query-based learner group.

Learner Group Criteria

This group box appears for criteria-based learner groups only.

Field or Control	***Description***
( ) (left parenthesis, right parenthesis)	Use parentheses to define complex relationships between the criteria. How you group criteria can affect the search results.

Field or Control	***Description***
Criteria Type	Select the type of criteria: • *Business Unit* • *Customer* • *Department* • *Department Hierarchy* Select to signify that learners in all departments that are subordinate to the selected department are to be included in the learner group. To use this feature, you must import the department tree hierarchy into Enterprise Learning Management from HR. • *Job Code* **Note:** You cannot define a criteria-based learner group where membership depends on multiple jobs (learners who hold both Job A and Job B, for example). When multiple jobs is a criterion for membership, create a separate learner group for each job and combine the groups when defining catalog security. An alternative is to create a query-based learner group. • *Learner* • *Learning Environment* • *Location* • *Region* See Understanding Person and Organization EIPs.
Operation	Select from the following: • < Less than. • <= Less than or equal to. • <> Not equal to. • = Equal to. • > Greater than. • >= Greater than or equal to.

Field or Control	***Description***
Criteria Value	Indicate the value to be compared.
AND/OR	Use these to define the relationships between the criteria. For example, you may want to include in the learner groups all members of the Australian Business Unit who are in the HR or Finance Departments. Your criteria would look something like Business Unit = AUS01 AND (Department = 1 OR Department = 4).
Populate Learner Group	To generate a list of members based on the selected criteria you can either click this button or run the Populate Learner Group process. If you are defining a group with a large membership, it may be more efficient to use the batch Populate Learner Group process. For a large, manually-maintained learner group, consider using the batch process to initially populate the group and then returning to this page to add and remove members, as needed. **Note:** When a learner group is manually-maintained and you click this button after adding or removing members, the manual changes that you made will be lost. See Populating Learner Groups Through Batch Processing.

Select Query

This group box appears for query-based learner groups only.

Field or Control	***Description***
Select a query to run	Choose the query to use to generate the group members.
Populate Learner Group	If the query depends on manually-entered values, click to display a page where you can enter the query criteria. After you enter the criteria and click **OK, the system displays the list of members on the** Group page. (You cannot use the batch Populate Learner Group process to initially populate the learner group in this case.) If the query does not depend on manually-entered values, you can click this button to generate a list of members or run the Populate Learner Group process. If you are defining a group with a large membership, it may be more efficient to use the batch process.

Group Members

Learners who meet the selection criteria are listed here. You can use the Search for Learners field to search for a selected group member.

Click a name to view the Learner Information page for that user. If **Automatically Maintain Membership** is not selected on the Learner page, you can manually add and delete group members.

Click the Process to Mass Enrollment link to begin the enrollment process for the learner group.

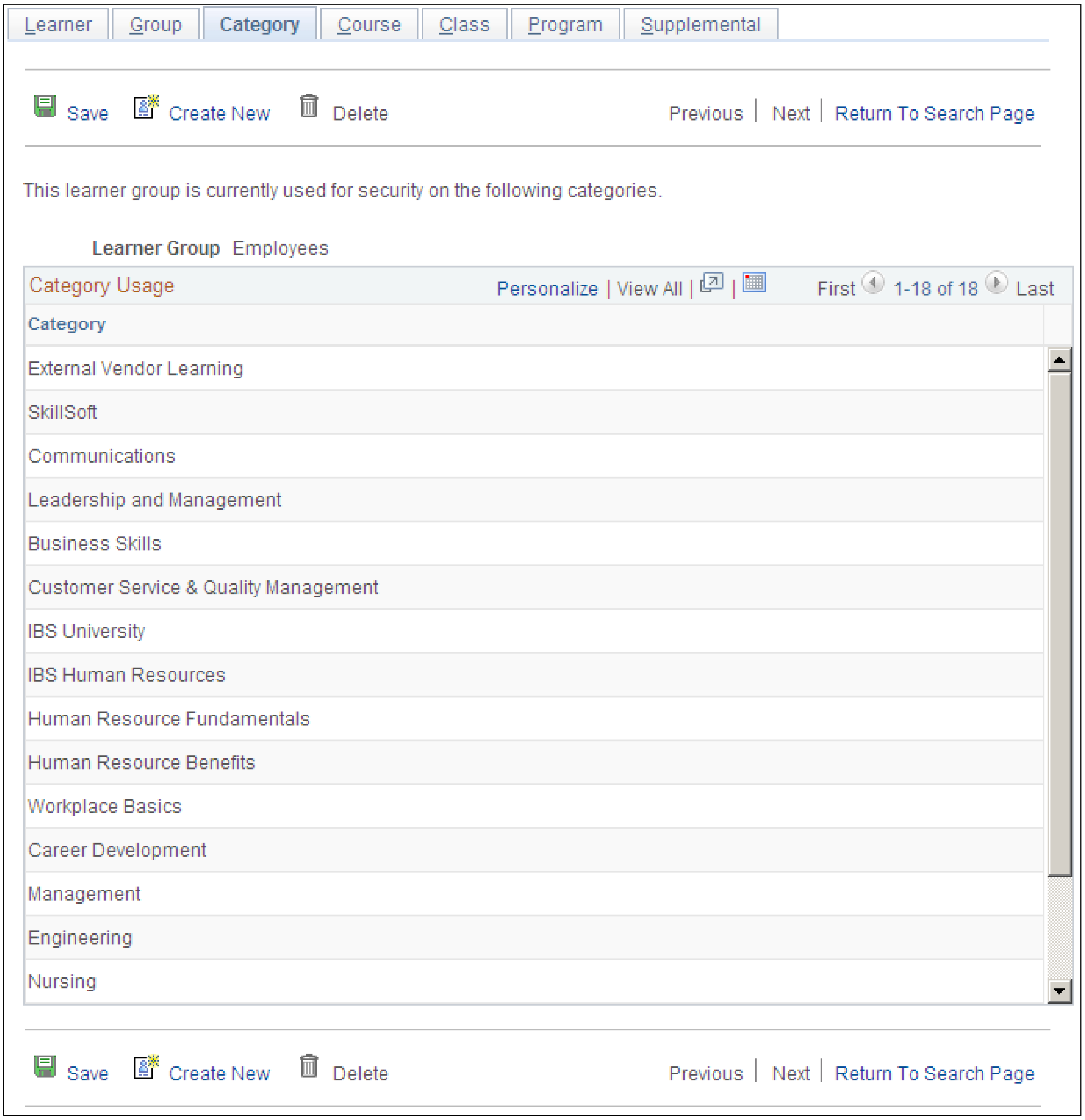
Category Page

Use the Category page (LM_CATG_LG_USAGE) to review the categories for which this learner group is used.

Navigation:

Click the **Add Criteria Based Learner Group** link or the **Add Query Based Learner Group** link on the Maintain Learner Groups page.

This example illustrates the fields and controls on the Category page.



Displays the categories for which the learner group is used for security.

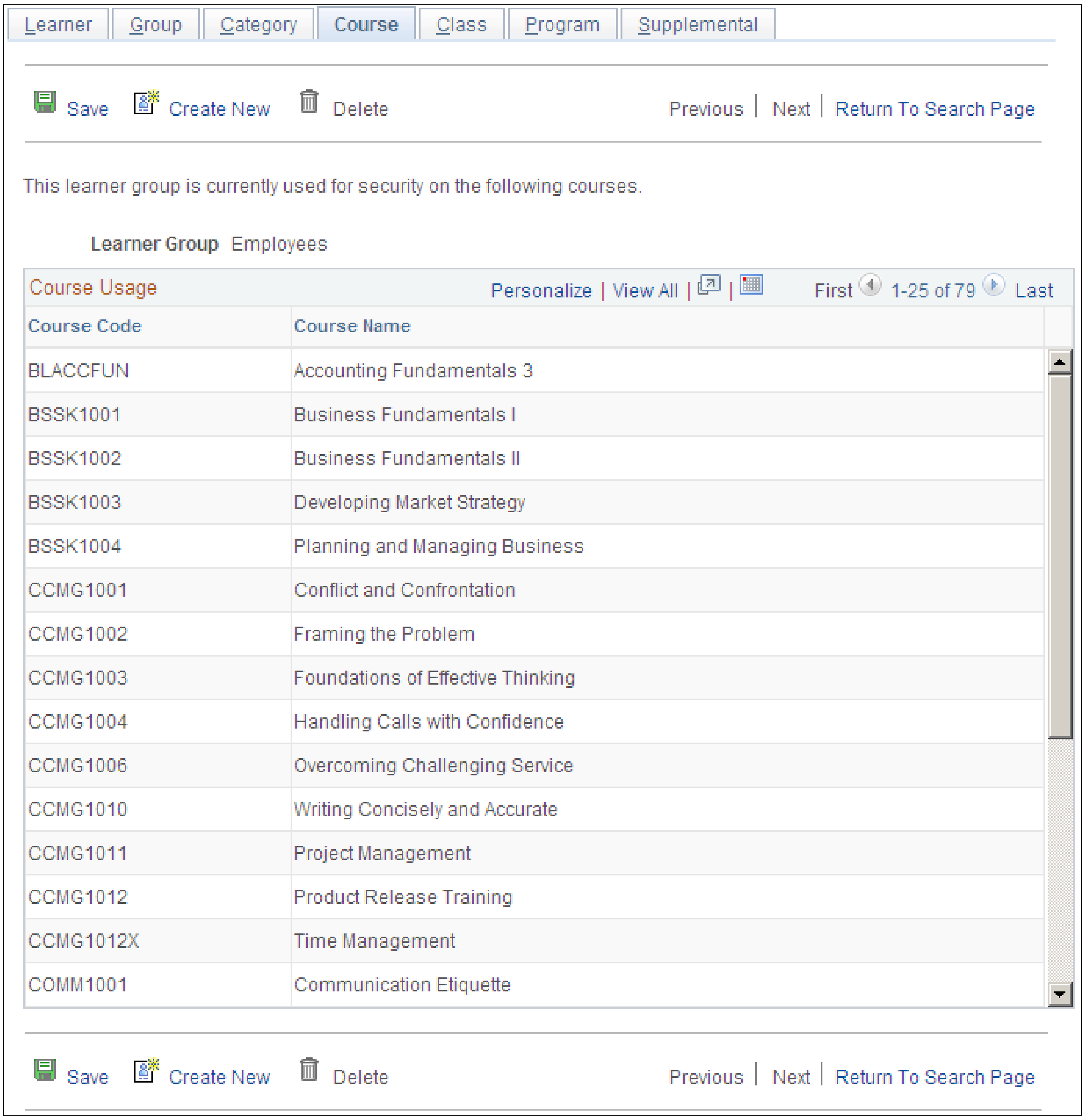
Course Page

Use the Course page (LM_CI_LG_USAGE) to review the courses for which this learner group is used.

Navigation:

Click the **Add Criteria Based Learner Group** link or the **Add Query Based Learner Group** link on the Maintain Learner Groups page.

This example illustrates the fields and controls on the Course page.



Displays the courses for which the learner group is used for security.

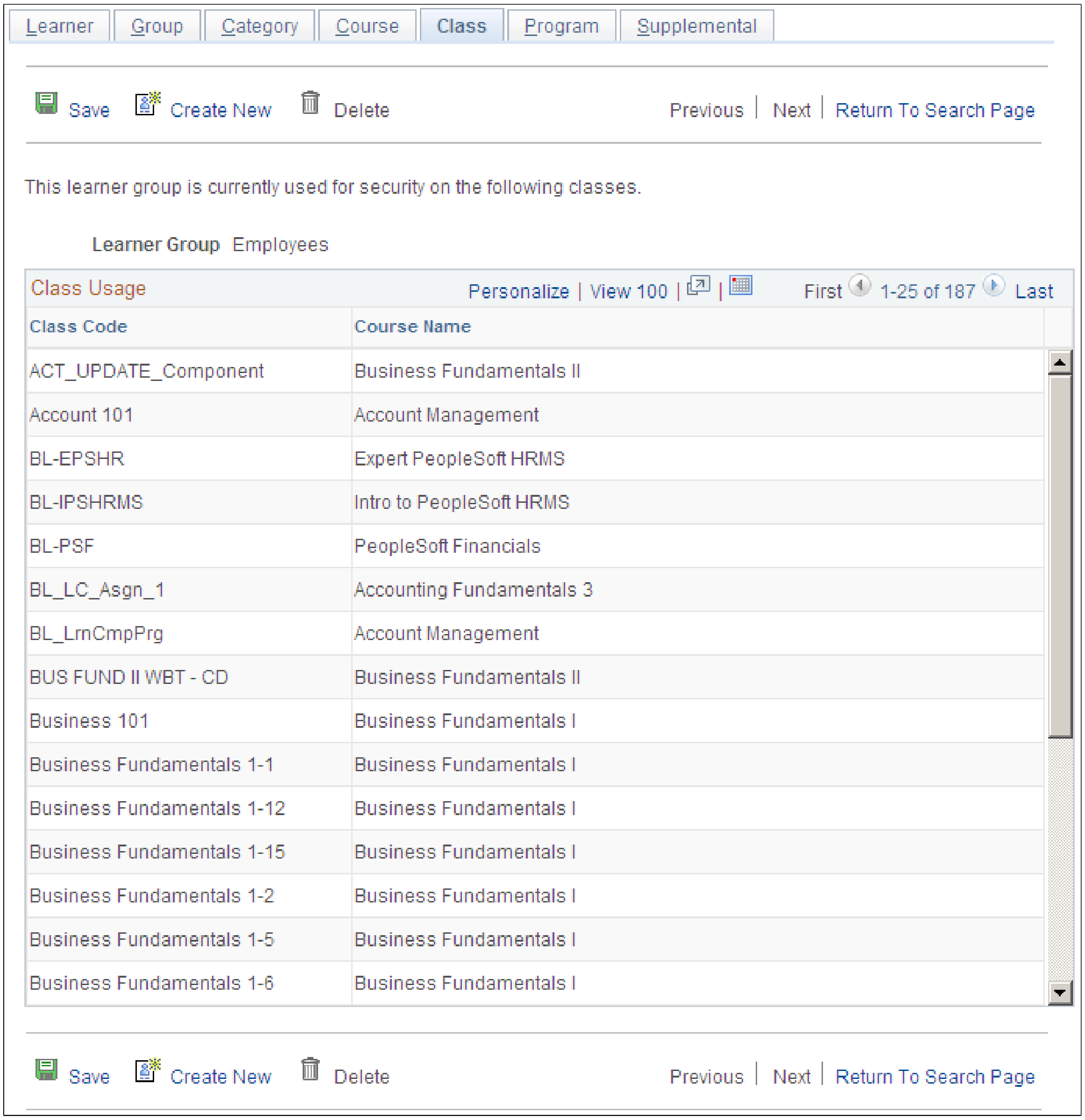
Class Page

Use the Class page (LM_ACT_LG_USAGE) to review the classes for which this learner group is used.

Navigation:

Click the **Add Criteria Based Learner Group** link or the **Add Query Based Learner Group** link on the Maintain Learner Groups page.

This example illustrates the fields and controls on the Class page.



Displays the classes for which the learner group is used for security.

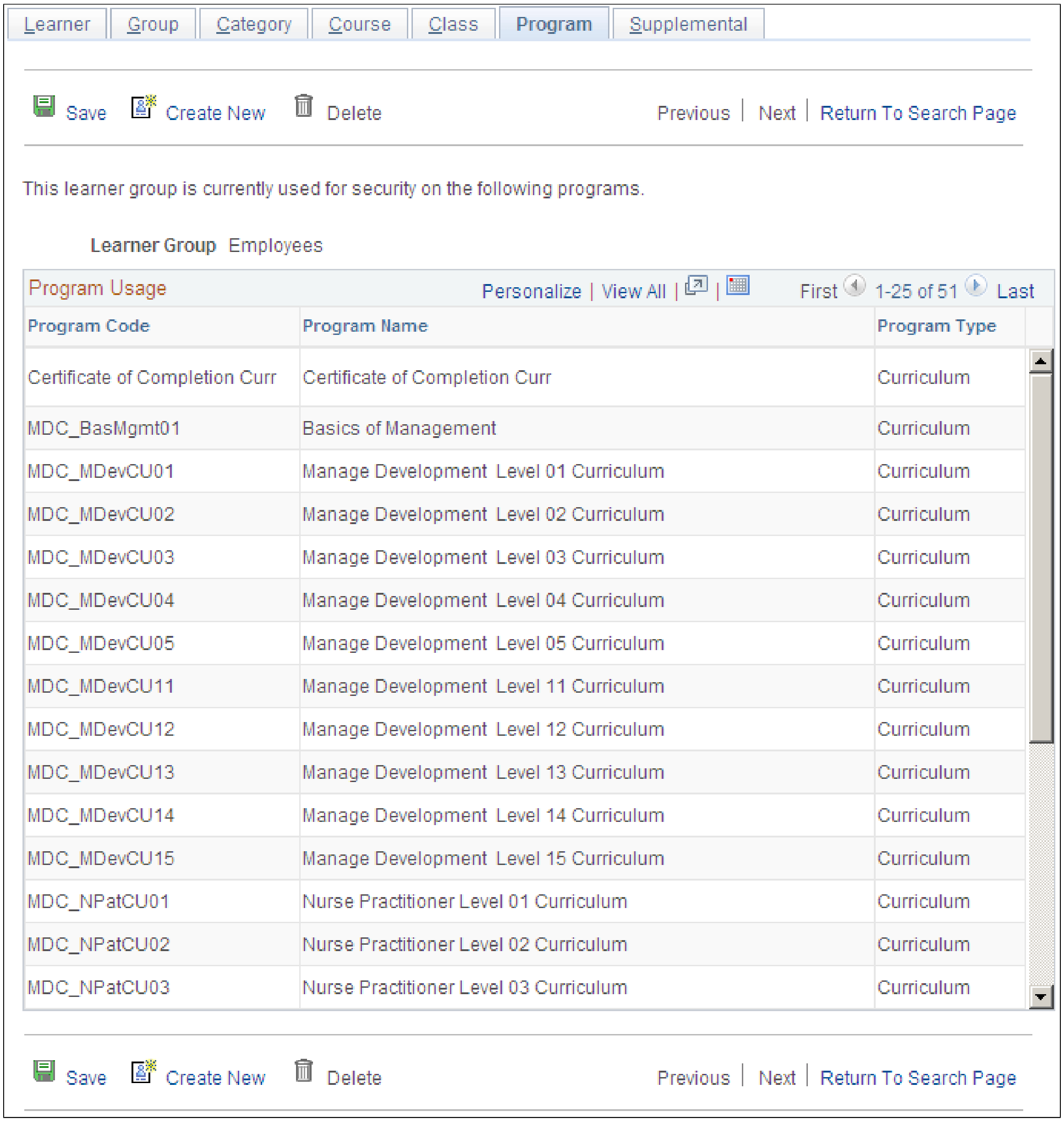
Program Page

Use the Program page (LM_PROG_LG_USAGE) to review the programs for which this learner group is used.

Navigation:

Click the **Add Criteria Based Learner Group** link or the **Add Query Based Learner Group** link on the Maintain Learner Groups page.

This example illustrates the fields and controls on the Program page.



Displays the programs for which the learner group is used for security.

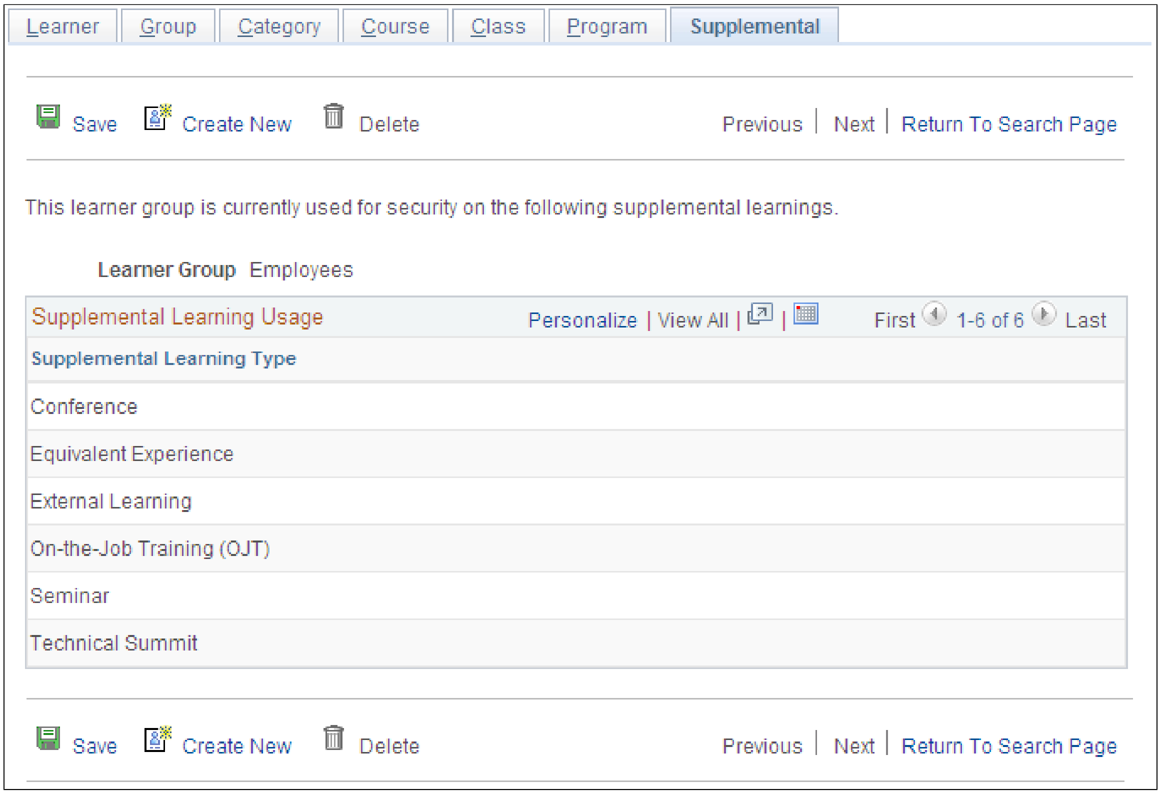
Supplemental Page

Use the Supplemental page (LM_ADHC_LG_USAGE) to review the supplemental learning types for which this learner group is used.

Navigation:

Click the **Add Criteria Based Learner Group** link or the **Add Query Based Learner Group** link on the Maintain Learner Groups page.

This example illustrates the fields and controls on the Supplemental page.



Displays the supplemental learning for which the learner group is used for security.

Populating Learner Groups Through Batch Processing

This topic lists prerequisites and discusses how to populate learner groups through batch processing.

When you create a learner group, you have two options for populating the group: you can click the Populate Learner Group button on the Group page or you can run the Build Learner Group process (LM_LRNRGR_AE). If you have created automatically-maintained learner groups, you should schedule this process to run nightly or at some other regular interval.

When you run the process for all scheduled groups, the system updates all automatically-maintained, query-based learner groups that are due for a rebuild based on their defined run recurrence. It also refreshes any automatically-maintained, criteria-based learner groups that are affected by changes that have been made to learner or department profiles.

After you populate a learner group, you can view the members through the Maintain Learner Groups component.

Page Used to Populate Learner Groups Through Batch Processing

Page Name	***Definition Name***	***Usage***
Populate Learner Groups Page	LM_LRNRGRP_RUNCNTL	Build learner groups by running the Build Learner Group process (LM_ LRNRGR_AE).

Prerequisite for Populating Learner Groups through Batch Processing

Before you can populate learner groups through batch processing, you must define a learner group through the Learner Group component.

See Building Learner Groups.

Populate Learner Groups Page

Use the Populate Learner Groups page (LM_LRNRGRP_RUNCNTL) to build learner groups by running the Build Learner Group process (LM_LRNRGR_AE).

Navigation:

Enterprise Learning > **Learner Groups** > **Populate Learner Groups** > **Populate Learner Group**

This example illustrates the fields and controls on the Populate Learner Groups page.

Field or Control	***Description***
Run Scheduled Learner Groups	Select to rebuild all automatically-maintained learner groups—criteria-based and query-based—that require a refresh. When you run the process, the system looks for all query-based learner groups that are scheduled for a rebuild as well as any criteria-based groups for which person or department data has changed since last running the process. It is likely that you will set up this process to run on a nightly batch process.
Learner Group ID	You can use this feature to refresh membership in a manually-maintained or automatically-maintained learner group. **Note:** If refreshing membership in a manually-maintained learner group, any members that you manually added or removed from the group will be overwritten.

Chapter 4

Setting Up Financial Integration

Understanding Financial Integration

Enterprise Learning Management enables you to integrate with PeopleSoft Financials or a third-party financials system. Benefits of integrating with a financials system include the tracking of enrollment, registration, and drop fees, as well as the ability to export chargeback data to your financials system. This export functionality enables a training organization to track what the training business makes in revenue, both externally (displayed by using reports) and internally (sent to the general ledger as a chargeback).

To integrate with a financials system, you must:

- Run financial EIPs.
- Set up financial ChartField data.
- Set up subledgers and subledger update options.

Understanding Financial EIPs and Application Messages

This topic discusses:

- Financial EIPs.
- Application messages.

See the product documentation for *PeopleTools: Integration Broker Service Operations Monitor*.

Financial EIPs

EIPs enable the sharing of data between two or more separate applications. Data sharing reduces data redundancy and data entry efforts because you must manage the data in only one system. This data is then updated in all relevant external systems each time that there are updates, thus ensuring that each external system has accurate data without having to key in the data changes to all external systems.

For financial data, Enterprise Learning Management uses EIPs to subscribe to ChartField data, general ledger business unit data, journal templates, and market rate data. Subscribing to this data ensures that the Enterprise Learning Management system always has the most current ChartField data, general ledger business unit data, journal templates, and market rate data that is necessary to implement financial integration. You must run the full sync table publish process for these EIPs or activate these EIPs during system setup. Run the full sync table publish process for the full sync messages to load all data from PeopleSoft Financials. Then activate incremental sync EIPs to keep the data synchronized after the initial load. Once activated, the incremental sync messages are initiated in response to saved field changes in the external financials system—for example, when you add a new ChartField value or change a market rate type. This data is then updated in Enterprise Learning Management, ensuring accurate data in all systems.

Enterprise Learning Management uses PeopleSoft Integration Broker technology to synchronize the tables and monitor transactions.

Use these guidelines for running financial EIPs:

- Run the full sync table publish process for the SetID EIP and business unit EIP messages (SETID_INITIALIZE, TBLSET_CONTROL_INITIALIZE, and BUS_UNIT_HR_FULLSYNC) before running the ChartField EIPs.
- Run the full sync table publish process for the market rate EIPs in this order: COUNTRY_FULLSYNC, CURRENCY_FULLSYNC, CURR_QUOTE_MTHD_FULLSYNC, MARKET_RATE_TYPE_FULLSYNC, MARKET_RATE_DEFN_FULLSYNC, MARKET_RATE_FULLSYNC.
- Run the full sync table publish process for the ChartField, general ledger business unit, journal template, and market rate EIP messages only once.
- Activate incremental sync ChartField, general ledger business unit, journal template, and market rate EIP messages after you run the full sync table publish process for each message.

See Understanding Person and Organization EIPs.

Note: A consultant or system administrator with EIP and PeopleSoft Integration Broker experience should be involved in both the initial full-sync process and the configuring of incremental sync processes.

The following tables list the application messages received by the Enterprise Learning Management financials components, the record initiating the message (in response to a saved field change in PeopleSoft Financials), and an explanation of what happens when a message is initiated:

Message Name	***Message Subscription PeopleCode***	***Record***	***Explanation***
TBLSET_CONTROL_INITIALIZE	LmTblSet	SET_CNTRL_TBL SET_CNTRL_GROUP SET_CNTRL_REC	All values are loaded. Additional rows are loaded to match prompt views used for componentization. **Note:** If you integrate with PeopleSoft Financials, you must add the following record group IDs on the Eo Recgrp page for the node in the PeopleSoft Financials system: FS_05 (Accounts), FS_20 (Funds), FS_28 (Programs), and FS_29 (Classes).
ACCOUNT_CHARTFIELD_FULLSYNC	LmAccountCFFull	GL_ACCOUNT_TBL	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.

Message Name	***Message Subscription PeopleCode***	***Record***	***Explanation***
ACCOUNT_CHARTFIELD_SYNC	LmAccountCF	GL_ACCOUNT_TBL	Values are added or updated. If the Account value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
ALTACCT_CF_FULLSYNC	LmAltAcctCFFullSync	ALTACCT	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.
ALTACCT_CF_SYNC	LmAltAcctCFSync	ALTACCT	Values are added or updated. If the Alternate Account value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
OPER_UNIT_CF_FULLSYNC	LmOperUnitCFFullSync	OPERATING_UNIT	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.
OPER_UNIT_CF_SYNC	LmOperUnitCFSync	OPERATING_UNIT	Values are added or updated. If the Operating Unit value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.

Message Name	***Message Subscription PeopleCode***	***Record***	***Explanation***
FUND_LOAD	LmFundCFFull	FUND_TBL	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.
FUND_CF_SYNC	LmFundCF	FUND_TBL	Values are added or updated. If the Fund value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
PROGRAM_CF_ FULLSYNC	LmProgramCFFullSync	PROGRAM_TBL	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.
PROGRAM_CF_SYNC	LmProgram	PROGRAM_TBL	Values are added or updated. If the Program ChartField value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
CLASS_CF_FULLSYNC	LmClassCFFull	CLASS_CF_TBL	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.

Message Name	***Message Subscription PeopleCode***	***Record***	***Explanation***
CLASS_CF_SYNC	LmClassCF	CLASS_CF_TBL	Values are added or updated. If the Class ChartField value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
BUDGET_REF_CF_ FULLSYNC	LmBudgetRefFullSync	BUDGET_REF	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.
BUDGET_REF_CF_SYNC	LmBudgetRefSync	BUDGET_REF	Values are added or updated. If the Budget Ref value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
PRODUCT_CHARTFIELD_ FULLSYNC	LmProductCFFullSync	PRODUCT	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.
PRODUCT_CHARTFIELD_ SYNC	LmProduct	PRODUCT	Values are added or updated. If the Product value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.

Message Name	***Message Subscription PeopleCode***	***Record***	***Explanation***
PROJECT_FULLSYNC	LmProjectCF	PROJECT	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.
PROJECT_SYNC	LmProjectCF	PROJECT	Values are added or updated. If the Project value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
CHARTFIELD1_ FULLSYNC	LmChartField1CFFullSync	CHARTFIELD1	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.
CHARTFIELD1_SYNC	LmChartField1Sync	CHARTFIELD1	Values are added or updated. If the ChartField1 value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
CHARTFIELD2_ FULLSYNC	LmChartField2CFFullSync	CHARTFIELD2	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.

Message Name	***Message Subscription PeopleCode***	***Record***	***Explanation***
CHARTFIELD2_SYNC	LmChartField2Sync	CHARTFIELD2	Values are added or updated. If the ChartField2 value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
CHARTFIELD3_FULLSYNC	LmChartField3CFFullSync	CHARTFIELD3	All existing data in the Enterprise Learning Management table is deleted, and all values are loaded into Enterprise Learning Management with a status of inactive.
CHARTFIELD3_SYNC	LmChartField3Sync	CHARTFIELD3	Values are added or updated. If the ChartField3 value already exists in Enterprise Learning Management as active, then the status from PeopleSoft Financials is brought over. If it is inactive in Enterprise Learning Management, the system sets the row to inactive.
BUS_UNIT_GL_SYNC	LmBusUnitGLFullSync	LM_BUS_UNIT_GL	All existing PeopleSoft General Ledger business unit values are loaded. Any existing general ledger business unit values are deleted.
BUS_UNIT_SYNC	LmBusUnitGL	LM_BUS_UNIT_GL	PeopleSoft General Ledger business unit values are added or updated.
JOURNAL_GEN_APPL_ID_FULLSYNC	JournalGenApplIDFullSync	LM_JRNLGEN_TMPL	All journal templates are loaded. Any existing journal templates are deleted. Journal templates are used to export data in the correct format to the accounting entry tables in the financials system.

Message Name	***Message Subscription PeopleCode***	***Record***	***Explanation***
JOURNAL_GENERATOR_APPL_ID_SYNC	JournalGeneratorAppIDSync	LM_JRNLGEN_TMPL	Journal templates in Enterprise Learning Management are added or updated. Journal templates are used to export data in the correct format to the accounting entry tables in the financials system.
CURR_QUOTE_MTHD_FULLSYNC	CurrQuoteMthdFullSync	CURR_QUOTE_TBL	All currency quotation methods are transmitted. Any existing currency quotation methods are deleted.
CURR_QUOTE_MTHD_SYNC	CurrQuoteMthdSync	CURR_QUOTE_TBL	Changes made to a currency quotation method are transmitted.
MARKET_RATE_INDEX_FULLSYNC	MarketRateIndexFullSync	RT_INDEX_TBL	All market rate indexes are transmitted. Any existing market rate indexes are deleted.
MARKET_RATE_INDEX_SYNC	MarketRateIndexSync	RT_INDEX_TBL	Changes made to a market rate index are transmitted.
MARKET_RATE_LOAD	MarketRateLoad	RT_RATE_TBL	Market rates are transmitted from a flat file format.
MARKET_RATE_FULLSYNC	MarketRateFullSync	RT_RATE_TBL	All market rates are transmitted. Any existing market rates are deleted.
MARKET_RATE_SYNC	MarketRateSync	RT_RATE_TBL	Changes made to a market rate are transmitted.
MARKET_RATE_TYPE_FULLSYNC	MarketRateTypeFullSync	RT_TYPE_TBL	All market rate types are transmitted. Any existing market rate types are deleted.
MARKET_RATE_TYPE_SYNC	MarketRateTypeSync	RT_TYPE_TBL	Changes made to a market rate type are transmitted.
MARKET_RATE_DEFN_FULLSYNC	MarketRateDefnFullSync	RT_RATE_DEF_TBL	All market rate definition data is transmitted. Any existing market rate definition data is deleted.

Message Name	Message Subscription PeopleCode	Record	Explanation
MARKET_RATE_DEFN_ SYNC	MarketRateDefnSync	RT_RATE_DEF_TBL	Changes made to a market rate definition are transmitted.

Application Messages

Enterprise Learning Management also provides several additional application messages. Unlike the full and incremental sync messages, you initiate these application messages in the Enterprise Learning Management system either when you make changes to fields on specific pages or when you run an Application Engine process.

The ChartField combination editing application messages are synchronous messages initiated whenever you save an Enterprise Learning Management page that has ChartFields, provided that you enabled the combination editing feature on the Install Defaults - General page. Combination editing enables the system to validate ChartField values that are dependent on each other. The system validates ChartField values against the rules defined in PeopleSoft Financials. If you integrate with a financials system other than PeopleSoft, you must create a method for validating ChartField values that users enter.

Other application messages are initiated when you run an Application Engine process in Enterprise Learning Management by using Process Scheduler, specifically, the process that you use to transmit chargeback data to the financials system.

The following table describes the synchronous application messages initiated when a user saves a page in the system that contains ChartField values, provided that you have enabled combination editing:

Message Name	Message Subscription PeopleCode	Record	Explanation
COMBO_CD_EDIT_ REQUEST (Synchronous Outbound)	Not applicable	LM_COMBO_MSG_H LM_COMBO_MSG_D	ChartField value combinations are verified. This request message is initiated each time that you save an Enterprise Learning Management page that has ChartField values, including ChartField setup pages, and payment pages used during enrollment in classes and registration in programs.
COMBO_CD_EDIT_REPLY	Not applicable	LM_COMBO_MSG_H LM_COMBO_MSG_D	This reply message indicates whether the ChartField value combination entered in Enterprise Learning Management is valid or invalid. This message is initiated when confirmation is received from PeopleSoft Financials.

The following table describes the application messages initiated each time that you run the Application Engine process that transmits chargeback data to the financials system:

Message Name	***Message Subscription PeopleCode***	***Record***	***Explanation***
LM_ACCTG_LN Outbound	JournalsCreated	LM_ACCTG_LN	This message sends the accounting lines in Enterprise Learning Management to PeopleSoft Financials. This message is initiated when you run the Export Accounting Entry to GL Application Engine process (LM_FI_GL_INTFC).
LM_ACCTG_LN Inbound	JournalsCreated	LM_ACCTG_LN	This message is sent from PeopleSoft Financials back to Enterprise Learning Management and updates the journal ID and journal date for each subledger entry. This message is initiated after the accounting lines are successfully posted to the general ledger.

Related Links

Sending Chargeback Data to the General Ledger

Setting Up Financial ChartField Data

To set up ChartField data, use the ChartField Configuration component (LM_CHARTFIELDS), ChartField Values component (LM_GL_ACCOUNT), and Business Unit Account component (LM_FIN_BU_CF).

Pages Used to Set Up Financial ChartField Data

Page Name	***Definition Name***	***Usage***
Chartfield Configuration Page	LM_CF_NAMES	Review and edit (if necessary) the delivered ChartFields.
Chartfield Values Page	LM_CF_VALUES	Review the current Chartfield configuration.
Account Page	LM_GL_ACCOUNT	Review and activate the imported ChartField values.

Page Name	***Definition Name***	***Usage***
Business Unit Accounts Page	LM_FIN_BU_CF	Define accounting defaults for each general ledger business unit.

Understanding Financial ChartField Data

This topic discusses:

- Financial ChartField data.
- Delivered ChartField data.
- ChartField setup with PeopleSoft Financials.
- ChartField setup with a third-party financials system.

Financial ChartField Data

ChartField values are values that you use to record enrollment, registration, and drop-fee chargebacks to departments and accounts. The system of record for the ChartFields is the financials management system. Enterprise Learning Management is designed to synchronize the ChartField values from the financials management system.

Each chargeback is a specific combination of one or more ChartField values and a department. This combination enables the appropriate accounts and departments to be charged and credited for enrollment, registration, and drop fees. In Enterprise Learning Management, you select default ChartField values for each general ledger business unit. Each general ledger business unit is mapped to a PeopleSoft HCM business unit. This mapping scheme is created and maintained in PeopleSoft HCM and is imported into Enterprise Learning Management when you run the PeopleSoft HCM EIPs.

The mapping scheme between general ledger business units and human resources business units determines which ChartFields that an internal learner can use. Internal learners inherit ChartField values from the general ledger business unit that is mapped to the PeopleSoft HCM business unit to which they belong. These ChartField values, along with the learner's department code, determine which accounts are charged enrollment, registration, and drop fees.

External learners inherit ChartField values from the customer organization to which they belong. Customer organizations inherit default ChartField values from a general ledger business unit. You can modify the default general ledger business unit ChartField values at the customer level.

Internal learners, external learners, and managers can edit ChartField values during enrollment or registration by using the self-service pages, but only if they are given access to do so on the ChartField setup pages. Administrators always have access to edit ChartField values during enrollment or registration.

Administrators can also edit ChartField values after enrollment or registration by using the Maintain Enrollments and Administer Program Rosters components. Note that the system always uses the current ChartField configuration, not the ChartField configuration that was used to enroll or register the learner in the class or program. Therefore, the ChartField values that an administrator can select or is required to select after enrollment or registration might be different for a learner if that learner moves to a different business unit, or if the ChartField configuration has changed.

Delivered ChartField Data

PeopleSoft delivers the following 13 ChartField codes and configurations, ready for use with PeopleSoft Financials:

1. LM_ALTACCT (Alternate Account).
2. LM_ACCOUNT (Account).
3. LM_OPERATING_UNIT (Operating Unit).
4. LM_FUND_CODE (Fund Code).
5. LM_HR_DEPTID (Department).

   Note: The ChartField code for LM_HR_DEPTID has no Accounts page. Review department profile information through the Review Departments page.

   See Defining Department Information.
6. LM_PROGRAM_CODE (Program Code).
7. LM_CLASS_FLD (Class Field).
8. LM_BUDGET_REF (Budget Reference).
9. LM_PRODUCT (Product).
10. LM_PROJECT_ID (Project).
11. LM_CHARTFIELD1 (ChartField1).
12. LM_CHARTFIELD2 (ChartField2).
13. LM_CHARTFIELD3 (ChartField3).

ChartField Setup with PeopleSoft Financials

If you integrate with PeopleSoft Financials, do the following to set up the ChartField configurations and values:

1. Review (and edit if necessary) the delivered ChartField configuration on the Chartfield Configuration page.
2. Run the PeopleSoft full_sync EIP process for each ChartField code for which you want to import the values from the PeopleSoft Financials system.

   See Financial EIPs.
3. Review and activate the imported ChartField value definitions on the Chartfield Values page.

   The system sets all ChartField values to inactive upon import, as it is much easier to activate the list of ChartField values that you will use with Enterprise Learning Management, than it is to deactivate all of the ChartField values that you are not using. For each ChartField value that you want to be active in PeopleSoft Enterprise Learning Management, set the value to active. PeopleSoft ChartField values support the use of effective dates, so a specific ChartField value might have more than one effective-dated record. Although Enterprise Learning Management is delivered ready for mapping with PeopleSoft Financials, you should also consider reviewing each imported value for accuracy.

4. Assign ChartField values to each general ledger business unit.

ChartField Setup with a Third-Party Financials System

If you integrate with a financials system other than PeopleSoft Financials, do the following to set up the ChartField configurations and values:

1. Review and edit the delivered ChartField configuration on the Chartfield Configuration page.

   It is recommended that you do not edit the ChartField **Code** value. Therefore, you must set up mapping rules between the system's ChartFields and those delivered by PeopleSoft.

2. Load ChartField values into the Enterprise Learning Management tables.

   Note: A consultant or system administrator with EIP experience should be involved in this process.

3. Review and activate the imported ChartField value definitions in the ChartField Values component.

   By default, the system sets all values to *inactive* upon import. For each ChartField value that you want to be active in Enterprise Learning Management, set the value to *active.* You should also carefully review each value for accuracy, to ensure that the external values imported as you intended. Reconfigure and reimport as needed to correct the ChartField values.

4. Assign ChartField values to each general ledger business unit.

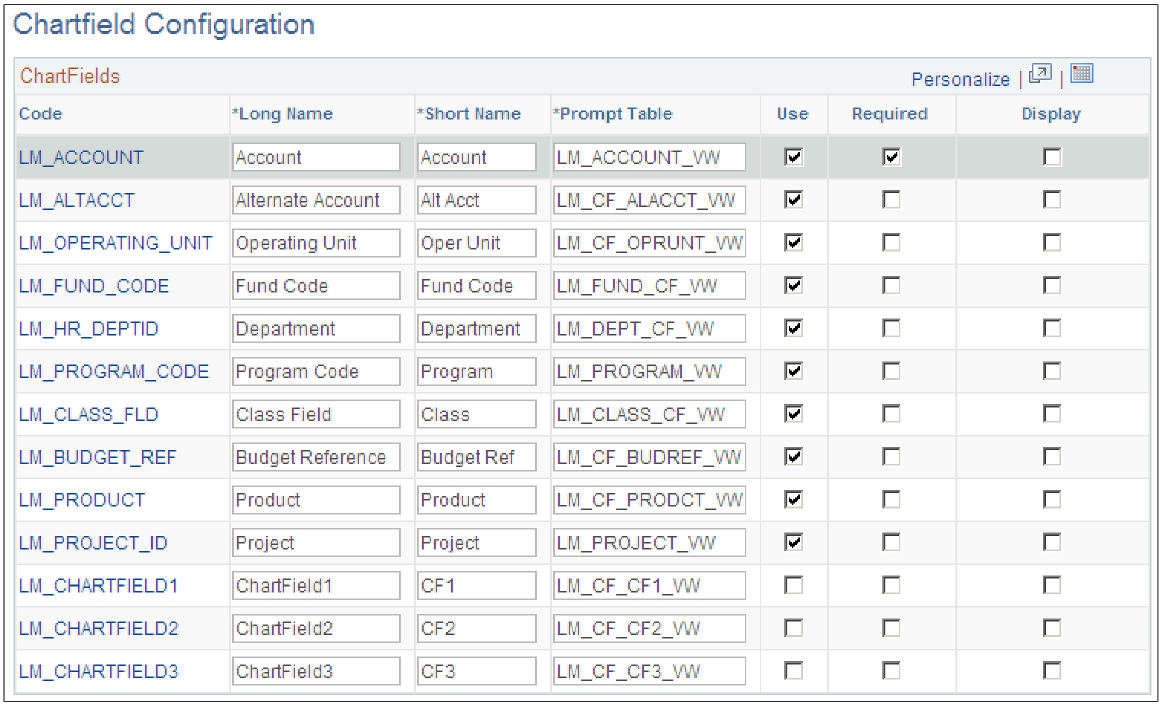
Chartfield Configuration Page

Use the Chartfield Configuration page (LM_CF_NAMES) to review and edit (if necessary) the delivered ChartFields.

Navigation:

Set Up ELM > **Financial Details** > **ChartField Configuration** > **ChartField Configuration**

This example illustrates the fields and controls on the ChartfFeld Configuration page.



Code	*Long Name	*Short Name	*Prompt Table	Use	Required	Display
LM_ACCOUNT	Account	Account	LM_ACCOUNT_VW	☑	☑	☐
LM_ALTACCT	Alternate Account	Alt Acct	LM_CF_ALACCT_VW	☑	☐	☐
LM_OPERATING_UNIT	Operating Unit	Oper Unit	LM_CF_OPRUNT_VW	☑	☐	☐
LM_FUND_CODE	Fund Code	Fund Code	LM_FUND_CF_VW	☑	☐	☐
LM_HR_DEPTID	Department	Department	LM_DEPT_CF_VW	☑	☐	☐
LM_PROGRAM_CODE	Program Code	Program	LM_PROGRAM_VW	☑	☐	☐
LM_CLASS_FLD	Class Field	Class	LM_CLASS_CF_VW	☑	☐	☐
LM_BUDGET_REF	Budget Reference	Budget Ref	LM_CF_BUDREF_VW	☑	☐	☐
LM_PRODUCT	Product	Product	LM_CF_PRODCT_VW	☑	☐	☐
LM_PROJECT_ID	Project	Project	LM_PROJECT_VW	☑	☐	☐
LM_CHARTFIELD1	ChartField1	CF1	LM_CF_CF1_VW	☐	☐	☐
LM_CHARTFIELD2	ChartField2	CF2	LM_CF_CF2_VW	☐	☐	☐
LM_CHARTFIELD3	ChartField3	CF3	LM_CF_CF3_VW	☐	☐	☐

Field or Control	***Description***
Code	Displays ChartField codes, which map to hardcoded Enterprise Learning Management values. Click a link to access the Account page where you can review and activate ChartField values. **Note:** If you assign different names to the ChartField1, ChartField2, and ChartField3 ChartFields, the names are imported from PeopleSoft Financials when you run the full synch table publish process for the ChartField1, ChartField2, and ChartField3 EIPs.
Long Name	Enter a long name for the ChartField. This value appears throughout all pages in the system in place of the hardcoded Enterprise Learning Management value that appears in the **Code** column. Name changes are not sent back to the financials system.
Short Name	Enter a short name for the ChartField. The short name is not used on any other pages in the system.
Prompt Table	Identify the name of the table against which Enterprise Learning Management prompts when a user selects a ChartField value. If you integrate with PeopleSoft Financials, use the default values that appear here. Do not change the values. If you integrate with a third-party financials system, you must make sure the Prompt Table fields correctly identify the tables that hold the ChartField values.

Field or Control	Description
Use	Select to define the ChartField as one that you use in Enterprise Learning Management. This selection causes the ChartField to appear as a prompt on the setup pages, on the enrollment and registration pages for administrators, and on the self-service enrollment and registration pages for learners and managers (if the **Display** option is also selected). Deselect this check box to prevent the ChartField from appearing on any other pages in the system. When the ChartFields are imported from the financials system, none are selected for use by default.
Required	Select to define a used ChartField value as required. Learners, managers, and administrators must enter a value for a required ChartField when setting up default ChartField values on the Business Unit Accounts page and the Payment Information page, or when enrolling or registering in classes or programs that carry charges, provided no default value appears. Deselect this check box to define a used ChartField value as optional to the learner, manager, or administrator.
Display	Select to display a used ChartField to self-service users (learners and managers) during enrollment and registration. This enables learners and managers to edit the ChartField values during enrollment or registration. If the ChartField does not appear, then the default ChartField values that you define on the Business Unit Accounts page are copied to the payment tables.

Chartfield Values Page

Use the Chartfield Values page (LM_CF_VALUES) to review the current Chartfield configuration.

Navigation:

Set Up ELM > **Financial Details** > **ChartField Values** > **ChartField Values**

This example illustrates the fields and controls on the Chartfield Values page.

Chartfield Values

ChartFields

Code	Long Name	Short Name	Use	Required	Display
LM_ACCOUNT	Account	Account	Y	Y	N
LM_ALTACCT	Alternate Account	Alt Acct	Y	N	N
LM_BUDGET_REF	Budget Reference	Budget Ref	Y	N	N
LM_CHARTFIELD1	ChartField1	CF1	N	N	N
LM_CHARTFIELD2	ChartField2	CF2	N	N	N
LM_CHARTFIELD3	ChartField3	CF3	N	N	N
LM_CLASS_FLD	Class Field	Class	Y	N	N
LM_FUND_CODE	Fund Code	Fund Code	Y	N	N
LM_HR_DEPTID	Department	Department	Y	N	N
LM_OPERATING_UNIT	Operating Unit	Oper Unit	Y	N	N
LM_PRODUCT	Product	Product	Y	N	N
LM_PROGRAM_CODE	Program Code	Program	Y	N	N
LM_PROJECT_ID	Project	Project	Y	N	N

Field or Control	***Description***
Effective Date	Displays the effective date of the ChartField value. When the effective date changes for an active ChartField value, the system sets the status of the ChartField value from *Active* to *Inactive.*
Status	Select a status for the ChartField value. Values are: *Active:* Select to activate the ChartField value. Activating ChartField values enables users to select these values from prompt tables on various setup pages and enables administrators to select these ChartField values during enrollment and registration. Learners and managers can also select these values on the self-service pages during enrollment and registration, but only if you display the ChartFields to learners and managers. Define the ChartField configuration on the Chartfield Configuration page. *Inactive:* Select to deactivate the ChartField value. The ChartField value does not appear as a value in any prompt tables in the system. By default, the system sets all ChartField values to *Inactive* when they are first imported into the system.

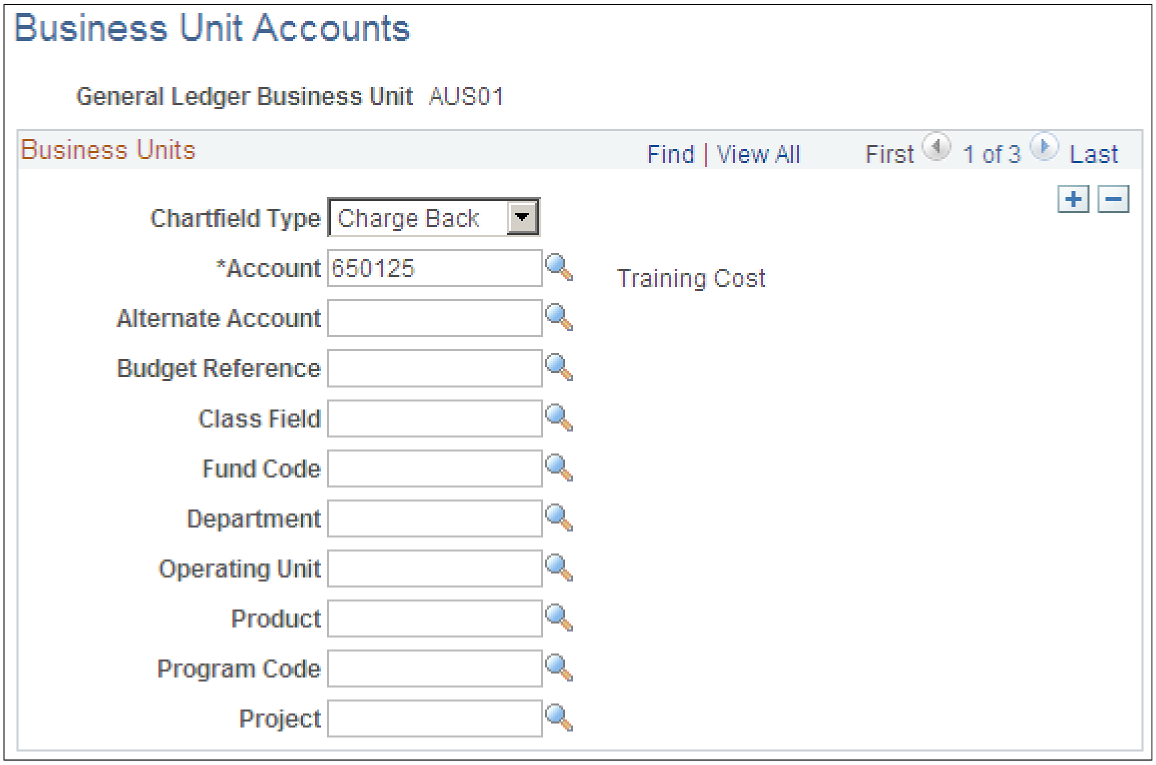
Business Unit Accounts Page

Use the Business Unit Accounts page (LM_FIN_BU_CF) to define accounting defaults for each general ledger business unit.

Navigation:

Set Up ELM > **Financial Details** > **Business Unit Accounts** > **Business Unit Accounts**

This example illustrates the fields and controls on the Business Unit Accounts page.



The ChartFields that appear on this page vary depending on which ChartFields you select to use on the Chartfield Configuration page. Values that you can select for each ChartField are based on the SetID that is associated with the business unit and whether the values have an active status on the Chartfield Values page.

When you integrate with PeopleSoft Financials, Enterprise Learning Management performs combination editing when you save the page to determine whether the ChartField values are valid, provided that you enable the combination editing feature on the Install Defaults - General page. If you enable the combination editing message, the system prompts you if the ChartField value pairs that you enter are invalid. You cannot save invalid combinations. You must enter a valid value or exit without saving the changes. If you integrate with a third-party financials system, you must create a method to verify whether the ChartField combinations that you enter are valid pairs.

Field or Control	***Description***
Chartfield Type	Select the type of ChartField. Values are: *Charge Back:* Select to define the account that is charged the enrollment, registration, or drop fee. When you define a chargeback account for a general ledger business unit, you must also define a credit account for that business unit. Transactions for enrollment, registration, or drop fees that do not have both a chargeback account and credit account defined cannot be sent to the general ledger. The ChartField values that you enter appear by default on the Payment Information page for customer organizations that are associated with this general ledger business unit. You can modify the values on the Payment Information page. These values also appear by default on the payment pages administrators use during enrollment and registration when the requester is an internal learner, and on the self-service payment pages that internal learners and managers use during enrollment and registration (if you selected to display ChartFields to self-service users on the Chartfield Configuration page). *Credit:* Select to define the account that is credited the enrollment, registration, or drop fee. This account information does not appear on any other pages in the system. You must define a credit account for each general ledger business unit if you have defined a chargeback account for that business unit. Transactions for enrollment, registration, or drop fees that do not have both a chargeback account and credit account defined cannot be sent to the general ledger. *Revenue:* Select to define the account that is paid for revenue transactions. Revenue transactions in Enterprise Learning Management include enrollment, registration, or drop fees where cash, checks, credit cards, purchase orders, or training units are used as the payment method. These ChartField values appear only by default on the Payment Information page for customer organizations that are associated with this general ledger business unit. You can modify the values on the Payment Information page. You cannot edit these values on any other pages in the system. Although the system writes revenue transactions to the Enterprise Learning Management subledger, the system does not export revenue transactions to an accounts receivable system. Enterprise Learning Management provides several reports that you can use to review revenue transactions for a customer organization. These reports enable you to track and manually update these transactions in the financials system. Or, you can create a process to export revenue transactions to the accounts receivable system.

Note: The department value that you define on this page for the **Department** ChartField appears by default only on the Payment Information page. The department value that you enter here does not appear by default on the payment pages for internal learners. Instead, the system uses department codes from PeopleSoft HCM for internal learners. You load these department codes into Enterprise Learning Management when you run the full sync table publish process for the PeopleSoft HCM EIPs.

Setting Up Subledgers

To set up subledgers use the Subledger Setup component (LM_SUBLEDGER_ID) and the Subledger Update Options component (LM_SUBLEDGER_UPD).

Pages Used to Set Up Subledgers

Page Name	***Definition Name***	***Usage***
Subledger Page	LM_SUBLEDGER_ID	Create subledger groups.
Subledger Update Options Page	LM_SUBLEDGER_UPD	Associate class types with class enrollment statuses. The combination of these values determines when transactions for class fees are ready to be written to the subledger.

Related Links

Posting Transactions to the Subledger

Understanding Subledgers

Enterprise Learning Management uses subledgers to store the transaction data that you eventually export to the general ledger in the financials system. To set up subledgers you must:

1. Create subledger groups.

   You can create as many subledger groups as necessary. For example, you can create a subledger group for each month or each quarter of the year. Determine the subledger groups that you must create based on the business needs of the organization.

2. Define rules for updating the subledger groups.

   You must specify criteria for when a transaction is ready to be written to a subledger group. This criteria is based on the class type and the learner's enrollment status. You can post transactions for classes that meet the specified criteria to a subledger group. Chargeback transactions in the subledger groups are eventually exported and written to the general ledger in the financials system. Revenue transactions are not exported to an accounts receivable system. However, you can create a process to export revenue transactions to the accounts receivable system if necessary.

Subledger Page

Use the Subledger page (LM_SUBLEDGER_ID) to create subledger groups.

Navigation:

Set Up ELM > **Financial Details** > **Subledger** > **Subledger**

This example illustrates the fields and controls on the Subledger page.

Field or Control	*Description*
Subledger	Enter a subledger group ID.
Description	Enter a description of the subledger group.
Delete Subledger Group	Click to delete a subledger group. This button is available only for subledger groups that do not contain transactions. This prevents you from deleting a subledger group that contains transactions.

Subledger Update Options Page

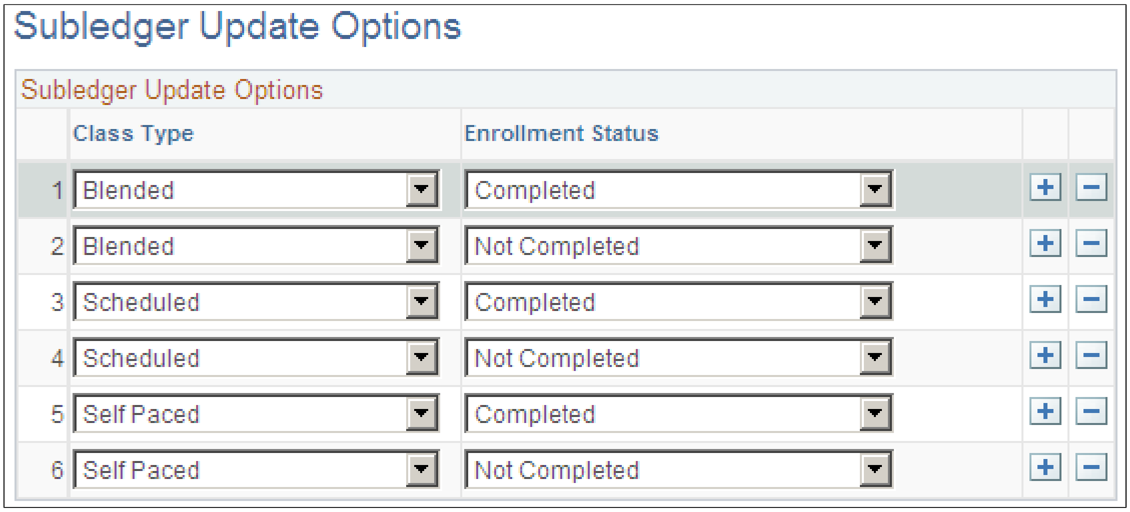
Use the Subledger Update Options page (LM_SUBLEDGER_UPD) to associate class types with class enrollment statuses.

The combination of these values determines when transactions for class fees are ready to be written to the subledger.

Navigation:

Set Up ELM > **Financial Details** > **Subledger Update Options** > **Subledger Update Options**

This example illustrates the fields and controls on the Subledger Update Options page.



Field or Control	***Description***
Class Type	Select a class type. Values are: *Blended:* a class that contains both scheduled and self-paced learning component types. *Scheduled:* a class that contains only scheduled learning component types. *Self-paced:* a class that contains only self-paced learning component types. See Setting Up Learning Component Types.
Enrollment Status	Select an enrollment status: *Completed, Denied, Dropped, Enrolled, In-Progress, Learning Request, Moved to New Class, Not Completed, Payment Approval, Pending Approval, Pending Payment, Planned, Waitlisted,* or *Waived.* You can specify as many enrollment statuses as you need for each class type. It's important to consider which combinations will work best for the business needs. You should also follow Generally Accepted Accounting Principles (GAAP) for any external transactions. See Understanding Enrollment and Registration.

Chapter 5

Setting Up Third Party Integration

Understanding Third Party Integration

This topic discusses the open integration framework and integration steps.

Open Integration Framework

PeopleSoft provides an open integration framework that enables you to integrate with Webcast and content management vendors to import classes into Enterprise Learning Management from an external source.

Here's a summary of how the integration works:

- For incoming data, an incoming message initiates the process.

  Using PeopleTools Integration Broker, the open integration framework process reads the XML document contained in the message and uses the standard XSLT to transform the XML. Finally, the open integration framework maps the transformed data to the corresponding learning management data and processes that information.

- For outgoing data, such as requesting a Webcast learning component from a vendor, a functional process initiates the outgoing message.

  The process reads from the learning management tables and uses data mapping to create an XML document. This initial XML document may be changed into to a PeopleSoft XML document. Another change is then applied to either the initial XML document or to the subsequent PeopleSoft XML document, depending on the supplier's needs, to create a final document. PeopleTools Integration Broker then sends the final document.

Implementation Steps

PeopleSoft delivers the catalog import application classes that you need to integrate with third parties. You can view the application class types and classes on pages provided in the Set Up ELM menu.

PeopleSoft also delivers the data mapping required for importing files in standard formats. To complete the data mapping setup, you must run the Datamapping Sync process (HRS_DM_SYNC).

Related Links

Defining Class Templates

Viewing Delivered Application Classes

To set up or view application classes, use the Application Class Registry component (HRS_APPCLASS).

Pages Used to View Delivered Application Classes

Page Name	***Definition Name***	***Usage***
Application Class Type Setup Page	HRS_ACTYPE	View delivered application class types.
Application Class Setup Page	HRS_APPCLASS	View delivered application classes.

Understanding Application Classes

The application class registry provides a flexible way to classify application classes. An application class type represents the specific interface, while the application classes that fall under that type implement that interface.

PeopleSoft delivers the application types and classes that you need to integrate Enterprise Learning Management with third-party Webcast and content sources.

See the product documentation for *PeopleTools: PeopleCode Developer's Guide*.

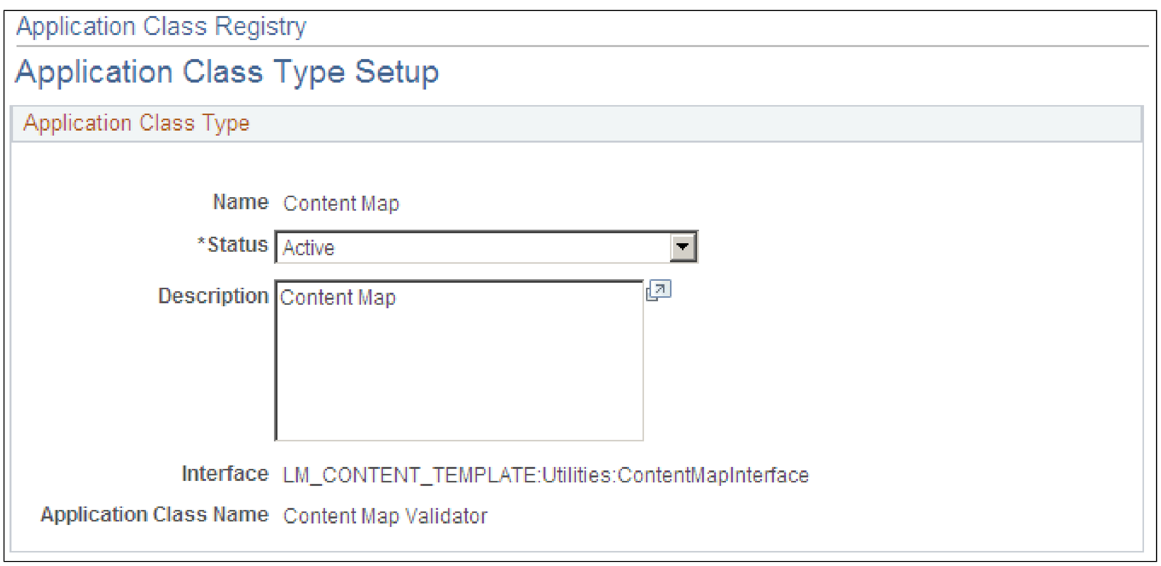
Application Class Type Setup Page

Use the Application Class Type Setup page (HRS_ACTYPE) to view delivered application class types.

Navigation:

Set Up ELM > **Utilities** > **Application Class Types** > **Application Class Type Setup**

This example illustrates the fields and controls on the Application Class Type Setup page.



Field or Control	***Description***
Name	The name describes this application class type.

Field or Control	***Description***
Status	The current status of the class type. Values are: • *Active:* Indicates a fully defined application class type. • *Deprecated:* Indicates that the class type is in the process of being retired. While it is still usable, there should be a newer version available. • *In Progress:* Indicates that the application class type is still in development. • *Retired:* Indicates that the class type is no longer used and is maintained only for historical purposes.
Interface	The PeopleTools application class interface that the application class type is associated with.
Verification	Identifies the registered application class used to validate that application classes meet the type requirement.

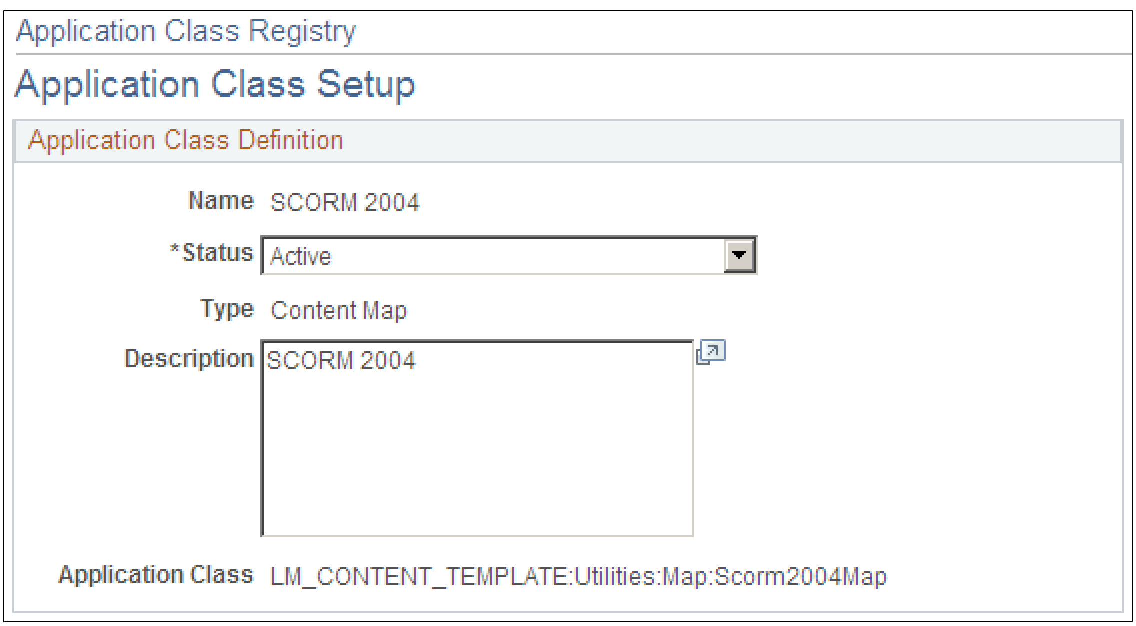
Application Class Setup Page

Use the Application Class Setup page (HRS_APPCLASS) to view delivered application classes.

Navigation:

Set Up ELM > **Utilities** > **Application Class Registry** > **Application Class Setup**

This example illustrates the fields and controls on the Application Class Setup page.



Field or Control	***Description***
Name	The name describes this application class.
Status	Status values are the same as for application class types. See Application Class Type Setup Page.
Type	The application class type determines which interface and verification is used to validate that the application class meets the standard for the type.
Application Class	The official designation of the application class definition.

Synchronizing Data Mapping Tables

To synchronize data mapping tables, use the System Process Request (PRCSMULTI) component.

Page Used to Run the Datamapping Sync Process

Page Name	***Definition Name***	***Usage***
Process Request Dialog Page	PRCSSAMPLEPNL1	Run the Datamapping Sync process to populate the data mapping tables.

Understanding the Datamapping Sync Process

The first step in setting up data mapping is to run the Datamapping Sync Application Engine process (HRS_DM_SYNC). This process performs all of the data mapping for the catalog import process. The Datamapping Sync process copies the data from the original tables into the data mapping tables.

Note: To keep the tables in sync, re-run this process periodically as you add new data to the system .

Process Request Dialog Page

Use the Process Request Dialog page (PRCSSAMPLEPNL1) to run the Datamapping Sync process to populate the data mapping tables.

Navigation:

PeopleTools > **Process Scheduler** > **System Process Requests** > **Process Request Dialog**

To run the Datamapping Sync process:

1. Enter a run control ID.

2. Click Run.
3. Select a process server.
4. Select the Datamapping Sync (HRS_DM_SYNC) process.
5. Click OK.
6. Click Process Monitor and verify that the process runs and posts successfully.

Viewing Delivered Data Mapping

To view or set up data mapping, use the Data Mapping Assignments (HRS_DM_MAP_SETUP), Category Setup (HRS_DM_CAT_SETUP), and Data Mapping (HRS_DM_MAPPING) components.

Pages Used to View Delivered Data Mapping

Page Name	***Definition Name***	***Usage***
Category Setup Page	HRS_DM_CAT_SETUP	View categories.
Key List Page	HRS_DM_CAT_KEYLIST	View key lists.
Value List Page	HRS_DM_CAT_VALLIST	View value lists.
Unmapped Data Page	HRS_DM_UNMAPPED	Map unmapped data.
Key Data Mapping Page	HRS_DM_MAPING_DICT	Map keys.
Value Data Mapping Page	HRS_DM_VALUE	Map values.

Understanding Data Mapping

PeopleSoft delivers the data mapping required to import files in these standard formats:

- Aircraft Industry Computer Based Training Committee (AICC)
- Sharable Content Object Reference Model (SCORM) 1.2 and 2004, Edition 4.
- PeopleSoft XML

Data mapping assignments define how the system translates the words or phrases coming into the system into the words or phrases used by your system. You can set up data mapping definitions based on vendors or the 25 delivered categories such as objectives, courses, delivery methods, instructors, and so on. You can also create just one data mapping definition for everything coming into your system.

Data mapping categories are data objects that are used by the assigned maps to define how data is mapped. PeopleSoft delivers 25 data mapping categories:

- Course.
- Category.
- Delivery method type.
- Instructor.
- Keyword.
- Keyword type.
- Language code.
- Objective.
- Person.
- Program.
- Review rating.
- Learner group
- Learning environment.
- Vendor.
- Currency codes.
- Reminder templates.
- Equipment.
- Facilities.
- Rooms.
- Materials.
- Learning component types.
- Learning component template.
- Roles.
- Frequency.
- Vendor product.

These delivered data mapping categories support the importing of learning components into class templates. If you create a new data mapping category, you must also define an appropriate application class.

Related Links

Creating Multiple Classes Using a Template (Catalog Import Process)

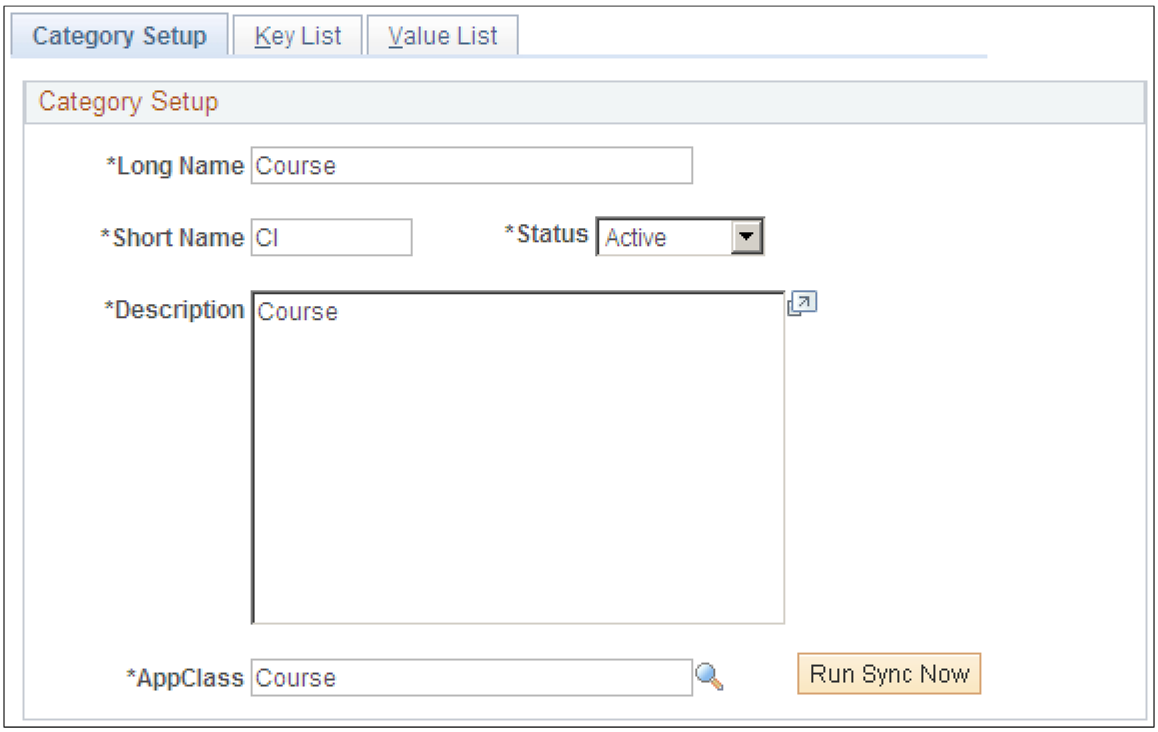
Category Setup Page

Use the Category Setup page (HRS_DM_CAT_SETUP) to view categories.

Navigation:

Set Up ELM > **Utilities** > **Data Mapping Categories** > **Category Setup**

This example illustrates the fields and controls on the Category Setup page.



Field or Control	***Description***
AppClass (application class)	The application class associated with the category. Each category needs a corresponding appclass of the type *Datamapping,* that has been registered in the Application Class Registry component (HRS_APPCLASS). The category forms the definition of the type of datamapping, while the appclass does the work of synchronizing the data from the original record into the datamapping tables.
Run Sync Now (run synchronization now)	Use when setting up new categories to synchronize the data associated with the selected data mapping category with the data actually existing in the corresponding component. This process populates the Key List and Value List pages.

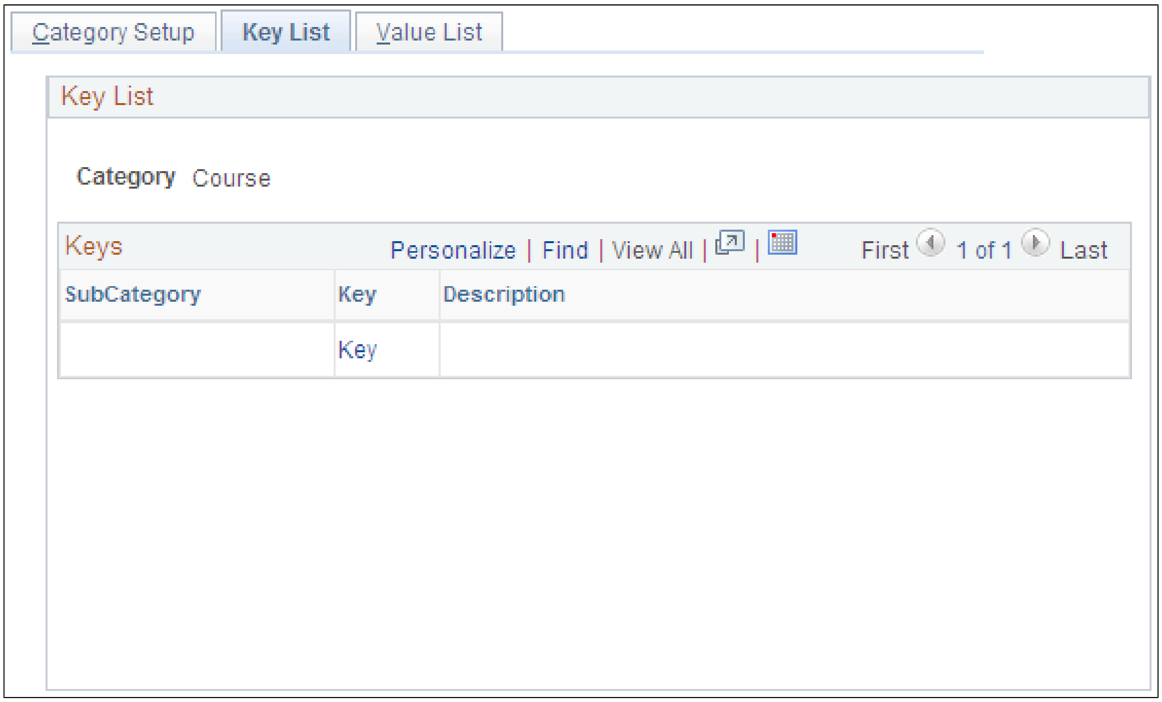
Key List Page

Use the Key List page (HRS_DM_CAT_KEYLIST) to view key lists.

Navigation:

Set Up ELM > **Utilities** > **Data Mapping Categories** > **Key List**

This example illustrates the fields and controls on the Key List page.



Field or Control	***Description***
Subcategory	Serves as a secondary key for the data mapping functionality. Not all categories use the subcategory secondary key. Subcategories themselves must also be data mappings.
Keys	Displays the primary key for the category. These keys are determined by the data in the associated data mapping category tables. Click the key link to access the Key Data Mapping page. This page displays all the values that are mapped to the given key.

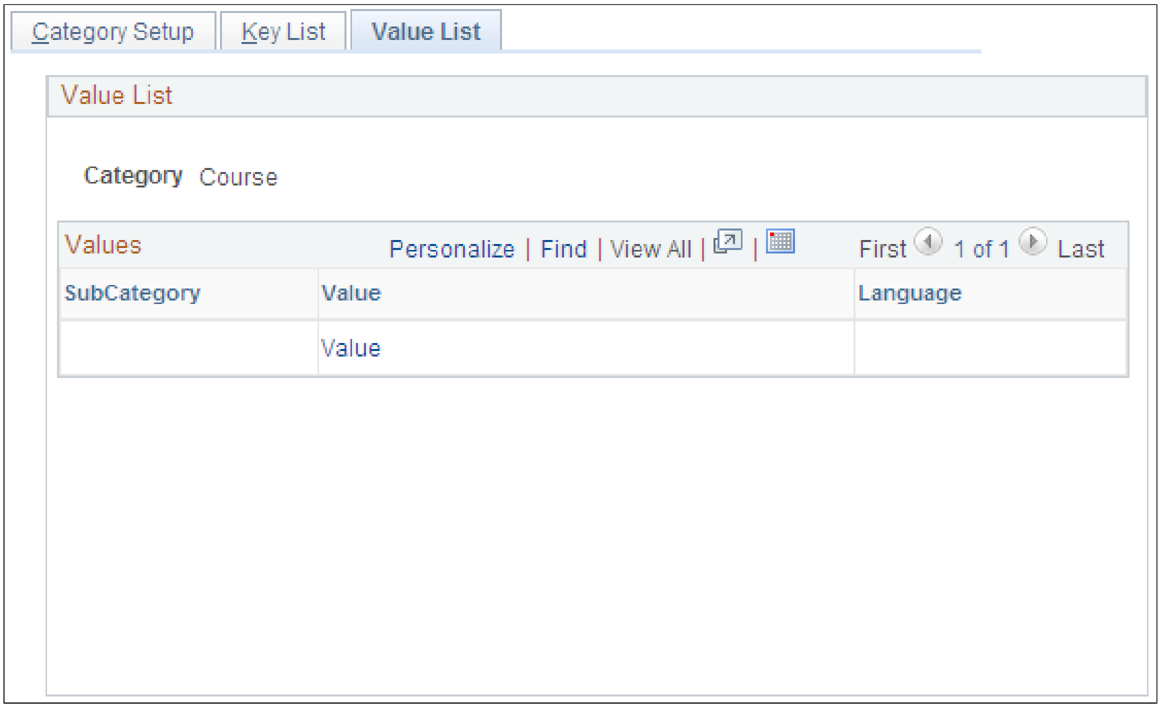
Value List Page

Use the Value List page (HRS_DM_CAT_VALLIST) to view value lists.

Navigation:

Set Up ELM > **Utilities** > **Data Mapping Categories** > **Value List**

This example illustrates the fields and controls on the Value List page.



The Value List page lists all the values that are being mapped to a category key. Click a link in the **Keys** column to access the Value Data Mapping page.

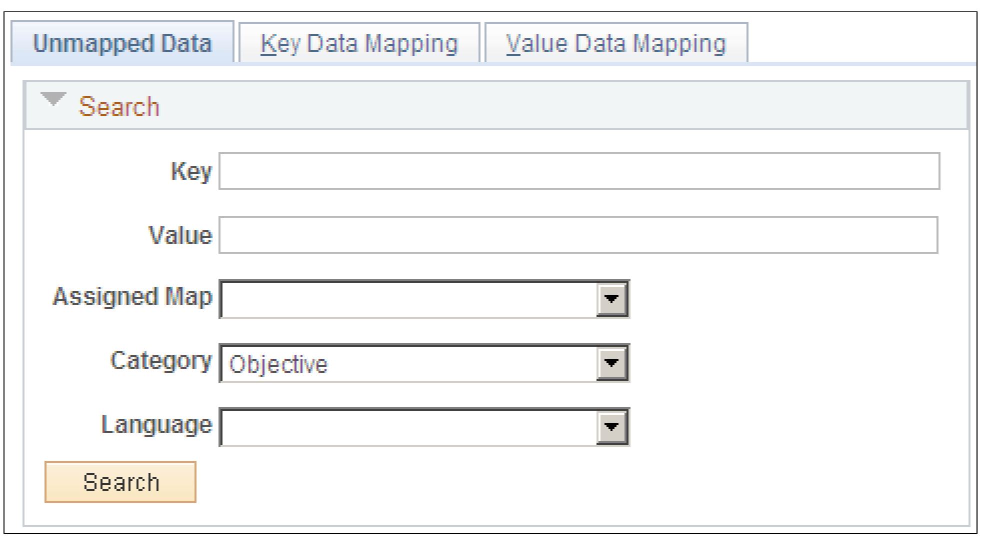
Unmapped Data Page

Use the Unmapped Data page (HRS_DM_UNMAPPED) to map unmapped data.

Navigation:

Set Up ELM > **Integration** > **Data Mapping** > **Unmapped Data**

This example illustrates the fields and controls on the Unmapped Data page.



Field or Control	***Description***
Minimum Score	Identifies a threshold for the Make Suggestions search. Only results that are greater than or equal to the minimum score appear in the **Key ID** field. The score of every suggestion found appears to the right of each key ID item in parentheses.
Make Suggestions	Click to run a search that provides a suggested mapping based on the minimum score that you entered.

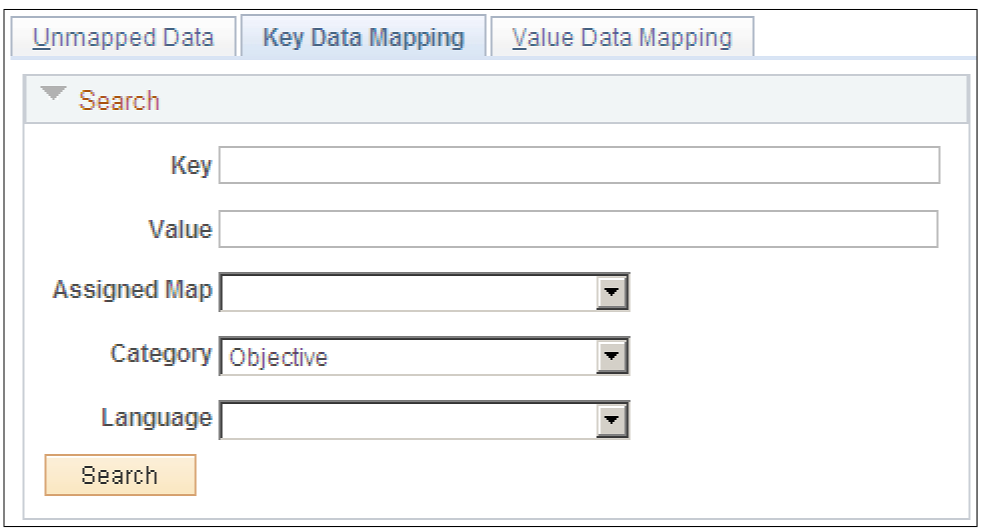
Key Data Mapping Page

Use the Key Data Mapping page (HRS_DM_MAPING_DICT) to map keys.

Navigation:

Set Up ELM > **Integration** > **Data Mapping** > **Key Data Mapping**

This example illustrates the fields and controls on the Key Data Mapping page.



This page displays a complete list of all the values that are mapped to a given key.

Values

This group box enables you to add other values to the key. The values must be chosen from the unmapped data values.

Field or Control	***Description***
Value	Select the values that are associated with the key.

Field or Control	***Description***
Assigned Map	Select the data mapping assignment that the key is associated with.
Language Code	Select the language that the value is assigned to.
Use	Select to use this data mapping for incoming data, outgoing data, or both.
Insert	Click to add a row to the group box.

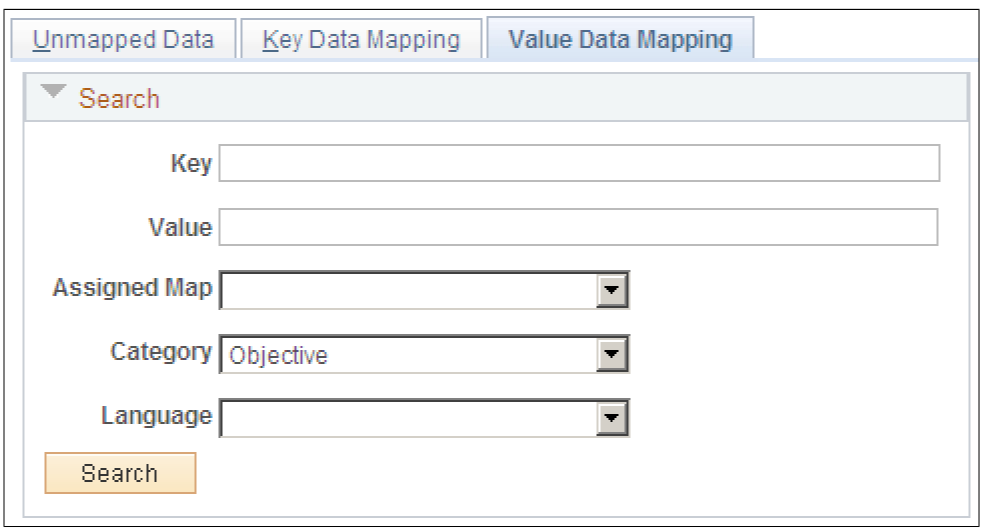
Value Data Mapping Page

Use the Value Data Mapping page (HRS_DM_VALUE) to map values.

Navigation:

Set Up ELM > **Integration** > **Data Mapping** > **Value Data Mapping**

This example illustrates the fields and controls on the Value Data Mapping page.



Displays all the keys that are mapped to the given value.

Keys

This group box displays all the keys that are mapped to the value and enables you to map more keys to the value. The keys that you add come from the unmapped data values.

Field or Control	*Description*
Key	Select the key ID of the data mapping.
Assigned Mapping ID	Select the data mapping assignment that the key is associated with.
Use	Select to use this data mapping for incoming data, outgoing data, or both.

Chapter 6

Managing Person and Organization Data

Understanding Person and Organization Data

Enterprise Learning Management tracks information for all individuals and organizations that interact with the system. Before it can do this, it must have a record of:

- Each person that uses the system—learners, instructors, managers, and administrators.
- Every user's department or customer organization.
- Every vendor organization that provides instructors, training facilities, or other resources.
- (FRA) If you are using the 2483 reporting features for France, each financing organization that provides funding for training.

Person Data

Every Enterprise Learning Management user, regardless of role, must have a learner profile. The profile identifies the person's name, learner ID, job, organization, learning environment, and other basic information.

Learners are classified as either internal or external:

- Internal learners are persons for whom a record exists in your HR application.

  To set up profiles for these individuals, you import data from your HR system. If a person has multiple jobs, data for all active jobs is loaded into Enterprise Learning Management.

  Note: If you are integrating with PeopleSoft HR 8.9 or above, an internal learner can be an employee; a contingent worker (a nonemployee who is part of the workforce, such as a contractor or temporary worker), or a person of interest (a nonemployee who is not part of the workforce, such as an external instructor or a board member).

- External learners are persons with no record in your HR system.

  You manually set up profiles for these individuals in Enterprise Learning Management.

Enterprise Learning Management provides self-service features that enable learners, instructors, and administrators to view and update learning preferences, and selected personal information.

Organization Data

Each learner must be associated with an organization. For internal learners, the organization is always the learner's department, which you import from the HR system. A learner's department identifies his or her default learning environment. Consequently, you should associate the appropriate learning environment with each department before you import learner data.

External learners must be associated with a customer organization that you set up manually in Enterprise Learning Management. The customer organization identifies the valid payment options for the learner. Unlike internal learners, external learners inherit the default learning environment from the administrator who adds the external learner to the system.

Common Setup Data

Name types (primary or maiden, for example), learner attributes (such as catalog search preferences), and contact methods (business and home, for example) are used when defining person and organization data in Enterprise Learning Management. Before you import or add person and organization data, you must define the prompt values that are relevant to your organization.

Understanding Person and Organization EIPs

Enterprise Learning Management is designed to integrate with other applications to enable the sharing of person and organization data. You can use the EIPs that are delivered with Enterprise Learning Management to import data for internal learners and departments from PeopleSoft HR. PeopleSoft HR remains the system of record for the imported data; this data can be viewed, but not changed, in Enterprise Learning Management.

Note: The delivered EIPs are designed to work with PeopleSoft HR. You can import data from any other XML-compliant HR application; however, modifications to the EIPs are necessary.

Full Sync and Incremental Sync EIPs

Enterprise Learning Management uses full sync and incremental sync EIP messages for importing person and organization data. It is recommended that you:

- Run full sync EIPs only during system implementation to import all data for a given message.
- Activate incremental EIPs after running full sync EIPs to ensure that additions, modifications, and deletions of data in your HR system are imported into Enterprise Learning Management.

  In some cases, data is transferred near-real time.

  When you integrate with PeopleSoft HR, Integration Broker technology is used to monitor transactions and synchronize the tables.

When you run an EIP message, the imported data is either loaded directly into the Enterprise Learning Management database or it goes to a staging table for validation before it is loaded. The process depends on the type of data that is being imported. Generally, data that is updated frequently or for which there is a high volume, such as learner and workforce data, goes to a staging table first.

Because of data dependencies, some EIPs must be run in a specific order.

Note: A consultant or system administrator with EIP and Integration Broker experience should be involved in both the initial full sync process and the configuring of incremental sync processes.

Instructions for running scripts are available in the PeopleTools documentation.

See *PeopleSoft Integration Broker*.

List of Full Sync EIPs for Person and Organization Data

The following table lists the delivered full sync EIP messages for person and organization data, the message subscription PeopleCode, the tables that are populated in Enterprise Learning Management, and an explanation of what happens when a message is initiated.

Message Name / Message Subscription PeopleCode	***Staging Table***	***Destination Record in Enterprise Learning Management***	***Explanation***
BUS_UNIT_HR_ FULLSYNC LmBusUnitHRFull		LM_BUS_UNIT_TBL	Deletes all values from the Enterprise Learning Management table and loads all values from HR.
COMPANY_FULLSYNC LM_CompanySync	LM_STG_HR_COMP	PS_LM_HR_COMP_TBL	Loads all values from HR into a staging table for validation. When loading data from the staging table to the final table, data that already exists (key match) is updated; otherwise new data is inserted into the final table.
COUNTRY_FULLSYNC CountryFullSync		COUNTRY_TBL	Deletes all values from the Enterprise Learning Management table and loads all values from HR.
CURRENCY_FULLSYNC CurrencySync		CURRENCY_CD_TBL	Loads all values from HR.
HR_ENROLL_ELM_ FULLSYNC LM_ TalentpoolLearnerFullSync		LM_PRG_REG	Loads Talent Pool members and associated learning programs from HR.
JOB_CODE_FULLSYNC LmJobCodeFull		LM_JOBCODE_TBL	Loads all values with an LM_JOBCODE_ID, which is different from the HR JobCode ID. The HR JobCode ID and SETID are stored on LM_JOBCODE_TBL.

Message Name / Message Subscription PeopleCode	Staging Table	Destination Record in Enterprise Learning Management	Explanation
LM_DEPT_FULLSYNC LmDepartmentFull	LM_STG_DEPT	LM_ORGANIZATION	Loads all values from HR into a staging table for validation. The HR Department ID and Department SETID are stored on LM_ORGANIZATION.
LOCATION_FULLSYNC LmLocationFULLSync	LM_LOCATION_TBL		Loads all values with an LM_LOCATION_ID, which is different from the HR Location ID. The HR Location ID and SETID are stored on LM_LOCATION_TBL.
PERSON_BASIC_FULLSYNC LmPersonSubscription	LM_STG_PRS, LM_STG_PRS_ADDR, LM_STG_PRS_DT, LM_STG_PRS_EML, LM_STG_PRS_NM, LM_STG_PRS_PHN	LM_PERSON LM_PERSON_ADDR LM_PERSON_EMAIL LM_PERSON_NAME LM_PERSON_EFFDT LM_PERSON_PHONE	Loads all values for all active records from HR into the staging tables. **Important!** Before you run this EIP, you must import user IDs from HR using either the USER_SYNC Application Engine process or the userexport.dms and userimport.dms Datamover scripts.
PERSON_CONTRACT_FULLSYNC LmLearnerContract		LM_LRN_CONTRACT LM_LRN_CONT_TYP	Loads all contract data for learners from HR.
PERS_POI_FULLSYNC LM_PersonPoiSync	LM_STG_PER_POI	LM_PERSON_POI	Loads all person of interest data for learners into a staging table.
POI_TYPE_TBL_FULLSYNC LM_PoiTypeSync	LM_STG_POI_TYP	LM_POI_TYPE_TBL	Loads all person of interest types into a staging table.

Message Name / Message Subscription PeopleCode	***Staging Table***	***Destination Record in Enterprise Learning Management***	***Explanation***
POSITION_FULLSYNC LmPositionSyncFull		LM_POSITION	Deletes all values from the Enterprise Learning Management table and loads all values from HR.
SETID_INITIALIZE LmSetID		SETID_TBL	Loads all values. **Important!** There is no incremental sync EIP for SETID information. You must rerun the full sync table publish process for the SETID_INITIALIZE message on a regular basis to publish any new SETIDs that are created in the HR system to Enterprise Learning Management.
STATE_FULLSYNC StateFullSync		STATE_TBL	Deletes all values from the Enterprise Learning Management table and loads all values from HR.
WORKFORCE_FULLSYNC LmWorkForce	LM_STG_PRS_JOB, LM_STG_PRS_ATT	LM_PERSON_JOB LM_PERSON_ATTRIB	Loads all values from HR into staging tables.

List of Incremental Sync EIPs for Person and Organization Data

The following table lists the delivered incremental sync EIP messages for person and organization data, the message subscription PeopleCode, the tables that are populated in Enterprise Learning Management, and an explanation of what happens when a message is initiated.

Note: The same staging tables are used for both full sync and incremental sync EIP messages.

Message Name and Message Subscription PeopleCode	***Destination Record in Enterprise Learning Management***	***Explanation***
BUS_UNIT_HR_SYNC LmBusUnitHR	LM_BUS_UNIT_TBL	Values are added, updated, or deleted to reflect and changes that have been made in PeopleSoft HR.

Message Name and Message Subscription PeopleCode	***Destination Record in Enterprise Learning Management***	***Explanation***
COMPANY_SYNC LM_CompanySync	PS_LM_HR_COMP_TBL	Loads all changes from HR into a staging table.
COUNTRY_SYNC CountrySync	COUNTRY_TBL	Values are loaded from HR.
CURRENCY_SYNC CurrencySync	CURRENCY_CD_TBL	Values are loaded from HR.
DEPT_SYNC Lm_DepartmentSync	LM_ORGANIZATION	Value is initially loaded into the staging table, LM_STG_DEPT with an LM_ ORGANIZATION_ID, which is different from the HR Department ID. The HR Department ID and Department SETID are stored on LM_ORGANIZATION. Learning environment appears by default from the Installation table, if this is an add (the department is new).
HR_ENROLL_ELM_SYNC LM_TalentpoolLearnerSync	LM_PR_REG	Loads any changes from HR to Talent Pool members and associated learning programs since the HR_PRG_ENROLL _FULLSYNC message was run. This includes additions and deletions.
JOBCODE_SYNC LmJobCodeSync	LM_JOBCODE_TBL	Value is loaded with an LM_JOBCODE _ID, which is different from the HR JobCode ID. The HR JobCode ID and SETID are stored in LM_JOBCODE_ TBL.
LOCATION_SYNC LmLocationSync	LM_LOCATION_TBL	Loads all values with an LM_ LOCATION_ID, which is different from the HR Location ID. The HR Location ID and SETID are stored on LM_LOCATION_TBL.

Message Name and Message Subscription PeopleCode	***Destination Record in Enterprise Learning Management***	***Explanation***
PERSON_BASIC_SYNC LmPersonSubscription	LM_PERSON LM_PERSON_EFFDT LM_PERSON_PHONE LM_PERSON_NAME LM_PERSON_ADDR LM_PERSON_EMAIL LM_PERSON_OPRID	Person changes are loaded from PeopleSoft HCM. EMPLID is converted to LM_PERSON_ID. Only contact method types that exist in Enterprise Learning Management are loaded (address, phone, email). Only name types that exist in Enterprise Learning Management are loaded.
PERSON_CONTRACT_SYNC LmLearnerContract	LM_LRN_CONTRACT LM_LRN_CONT_TYP	Values are added, updated, or deleted to reflect and changes that have been made in PeopleSoft HR.
POSITION_SYNC LmPositionSync	LM_POSITION	Values are loaded from PeopleSoft HCM.
SETID_INITIALIZE LmSetIDInitialize	SETID_TBL	All values are loaded. **Important!** PeopleSoft does not deliver an incremental sync EIP for SETID information. You must rerun the full sync table publish process for the SETID_ INITIALIZE message on a regular basis to publish any new SETIDs that are created in the HR system to Enterprise Learning Management.
STATE_SYNC StateSync	STATE_TBL	Values are loaded from HR.
USER_PROFILE LM_PersonOprid	PSOPRDEFN PSOPRALIAS PSUSEREMAIL	Values are loaded from HR

Message Name and Message Subscription PeopleCode	***Destination Record in Enterprise Learning Management***	***Explanation***
WORKFORCE_SYNC LmWorkForce	LM_PERSON_JOB LM_PERSON_ATTRB	Workforce changes are loaded from PeopleSoft HCM. Data is only loaded if person already exists on LM_PERSON. DeptID is converted to LM_ORGANIZATIONID. ChartFields appear by default from learning environment if this is a hire.
PERS_POI_SYNC LM_PersonPoiSync	LM_PERSON_POI	Person of Interest changes are loaded from PeopleSoft HCM. Only new records are loaded. Existing records are not updated.
POI_TYPE_TBL_SYNC LM_PoiTypeSync	LM_POI_TYPE_TBL	Person of Interest types are loaded from PeopleSoft HCM. New values are added and existing values are updated.

Understanding Person and Organization Setup Steps

This topic lists prerequisites and provides an overview of the setup steps for learners and organizations.

Prerequisites

Before you set up learners and organizations:

- Define system defaults.
- Create learning environments.
- Select a default learning environment on the Install Defaults page.

Setup Steps

Following is an overview of the setup steps.

Note: You can use the ELM Full Sync Integration Guided Process to initiate and monitor many of the full sync EIPs listed in these steps. For more information, see Understanding the ELM Full Sync Integration Guided Process.

1. Define contact method types.

   Ensure that the contact methods that are used your HR application are defined in Enterprise Learning Management. If a contact method does not exist in Enterprise Learning Management, then the related phone, address, and email information will not be imported from HR.

2. (Optional) Define name types and learner attributes.

   Name types and learner attributes are delivered as system data. You can add to these, as needed

3. Run the following full sync subscription EIPs to load data into Enterprise Learning Management:

   - SETID_INITIALIZE
   - COUNTRY_FULLSYNC
   - STATE_FULLSYNC
   - CURRENCY_FULLSYNC

4. Import, load, and configure department data:

   a. Run the DEPT_FULLSYNC EIP to import department data into the staging table.

   b. Run the Process FullSync Data process to validate and load the data.

   c. Assign a learning environment to each department.

      By default, departments inherit the learning environment designated by the Install Defaults component. You can change a department's default assignment on the Review Departments page. Internal learners inherit their department's learning environment when you import internal learner data.

   d. Specify which department ID to assign to internal learners who are imported without a department.

      Select the default Department ID on the Install Defaults - General page.

      Note: The department is used for internal chargebacks when an employee enrolls in learning that has a cost associated with it.

5. Import and load company data.

   Note: Company information is used to generate training plans and the 2483 report for France. Import company data if you plan to use these features.

   a. Run the COMPANY_FULLSYNC EIP to import company data into the staging table.

   b. Run the Process FullSync Data (LM_LD_STGDAT) process to validate and load the data.

6. Import and load person of interest types.

   Note: Person of interest information can only be imported from PeopleSoft HCM 8.9 and above.

   a. Run the POI_TYPE_TBL_FULLSYNC EIP to import person of interest types into the staging table.

   b. Run the Process FullSync Data process to validate and load the data.

7. Run the BUS_UNIT_HR_FULLSYNC EIP to import and load business units.
8. Run the JOBCODE_FULLSYNC EIP to import and load job codes.
9. Run the POSITION_FULLSYNC EIP to import and load position data.
10. Import User IDs for internal learners.

    A full sync EIP message is not available for USER_PROFILE. Therefore, to import User IDs for internal learners, you can use one of two methods:

    a. Run the userexport.dms and userimport.dms Data Mover scripts, delivered in the Scripts directory. The export script exports user data from the PeopleSoft HCM system, and the import script imports the user data into Enterprise Learning Management.

    Note: The Data Mover scripts are typically the faster option, but they require customization so that the scripts ignore duplicates that can cause administrator accounts to be overwritten.

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    b. Run the USER_SYNC process from the Application Engine Request page.

11. Run the following EIPs in the order listed to import person data for internal learners. After you run each EIP, run the Process FullSync Data process to validate the data in the staging table and load it into Enterprise Learning Management.

    - PERSON_BASIC_FULLSYNC
    - WORKFORCE_FULLSYNC
    - PERS_POI_FULLSYNC

    Note: Person of interest information can only be imported from PeopleSoft HCM 8.9 and above.

    - (FRA) PERSON_CONTRACT_FULLSYNC

    Note: Running the PERSON_CONTRACT_FULLSYNC is only necessary if you maintain contracts in your HR system. If you maintain contracts within Enterprise Learning Management, then you don't need to run this EIP. Instead, use the Contracts page of the Internal Learners component to enter any contract information.

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12. Define profiles for customer organizations.

    Use the Define Customers component to define customer profiles.

13. Create profiles for external learners.

    Use the External Learners component to define profiles for external learners.

14. Set up vendor profiles. Use the Vendors component to define vendors and enter information their products, pricing, and packages.
15. Set up instructors profiles.

Use the Instructors component to enter the instructor costs, qualifications, teaching preferences, and other information.

16. (FRA) Set up financing organizations.

    Use the Define Financing Organization component to set up profiles for French funding organizations.

17. (FRA) Define contract types.

    Use the Contract Types component to define contract types for French learners.

18. Activate the incremental sync EIP messages.

See table loading sequence documentation on the My Oracle Support website.

Common Elements in This Documentation

Field or Control	***Description***
(alternate character)	Click the **Alternate Character** icon to display a field for entering alternate characters.

Defining Contact Methods, Name Types, and Learner Attributes

To set up contact methods, name types, and learner attributes use the Contact Method Types (LM_CM_PURP_TYPE) component, Name Types (LM_NAME_TYPE) component, and Learner Attributes (LM_ATTRIBS) component.

Pages Used to Set Up Contact Method Types, Name Types, and Learner Attributes

Page Name	***Definition Name***	***Usage***
Contact Method Types Page	LM_CM_PURP_TYPE	Set up contact method types, such as *Home, Business,* and *Mailing.*
Name Types Page	LM_NAME_TYPE	Set up name types by defining name type values.
Learner Attributes Page	LM_ATTRIBS	Set up catalog search preferences that you can assign to learners.

Understanding Contact Methods, Name Types, and Learner Attributes

Before you add learner and organization data to the system, you define the set of name types, learner attributes, and contact methods that are valid for your organization. Users can select from these values when creating learner and organization profiles.

Contact Method Types

At a minimum, you must set up contact method types for every phone, address, and email type that exists in the external HR system. This ensures the accuracy of EIP updates to Enterprise Learning Management learner information. If you add or change phone, address, or email types in the HR system, you must manually make these additions and changes in Enterprise Learning Management. The system does not automatically import these updates into Enterprise Learning Management.

You associate contact method types with learner, instructor, vendor, and customer phone number and address information on the Address History page.

Name Types

Two name types are delivered as system data: Preferred and Primary. You can create additional name types. When you import person data from HR, only names types that exist in Enterprise Learning Management are loaded.

Learner Attributes

You can use learner attributes to specify how learners prefer to learn, and to set catalog search and viewing preferences. For example, learners can choose their preferred delivery methods for learning, such as web-based or classroom. The system sorts search results according to a learner's set preference.

Administrators can use the Learner Attributes page to select a set of default attributes for all learners. Learners can use the self-service Preferences page to update their own preferences.

Enterprise Learning Management provides definitions for several learner attributes, which you should not delete. You can define additional learner attribute definitions; however, you must build the prompt table and insert values by using PeopleSoft Application Designer.

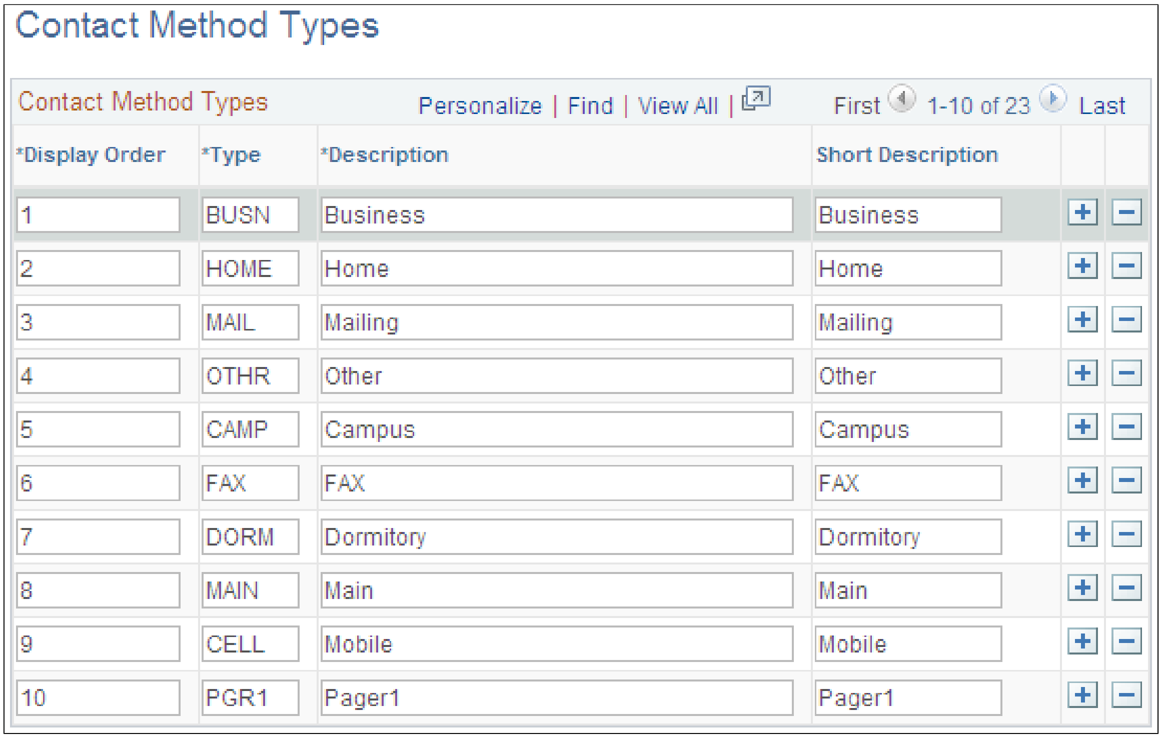
Contact Method Types Page

Use the Contact Method Types page (LM_CM_PURP_TYPE) to set up contact method types, such as Home, Business, and Mailing.

Navigation:

Set Up ELM > Contact Method Types > Contact Method Types

This example illustrates the fields and controls on the Contact Method Types page.



Set up different types of contact methods. For example: *Home, Business, Mailing, Billing,* or *Other*.

Important! At a minimum, you must set up contact method types for every phone, address, and email type that exists in the external HR system.

Field or Control	***Description***
Display Order	Specify the display order for each method type. This value sets the order in which values appear in the **Address Type, Phone Type,** and **Email Type** drop-down menus.
Type	Enter purpose code values that are one to four characters in length to designate contact method types.
Description and **Short Description**	Enter a description and short description for the contact type. These values appear as prompt and related display values throughout the system.

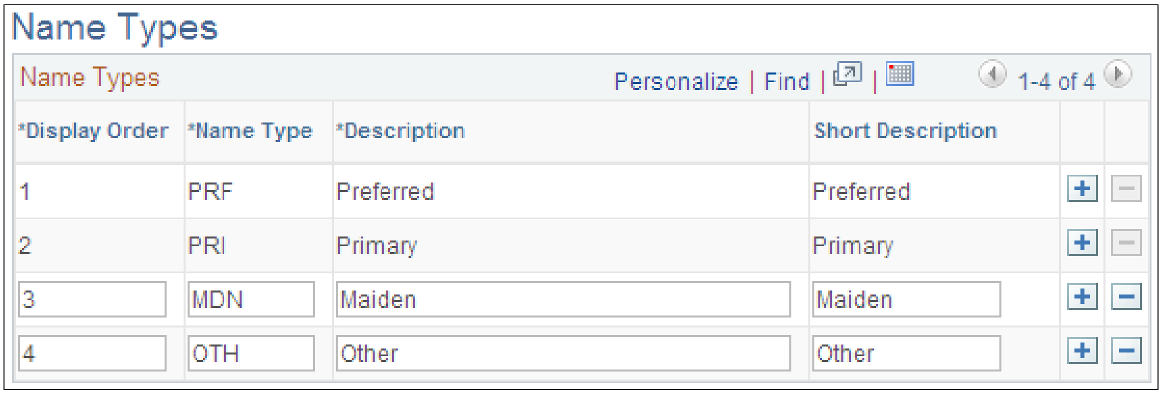
Name Types Page

Use the Name Types page (LM_NAME_TYPE) to set up name types by defining name type values.

Navigation:

Set Up ELM > **Users** > **Name Type** > **Name Types**

This example illustrates the fields and controls on the Name Types page.



Enterprise Learning Management provides two name type values: *Primary* and *Preferred.* You can add values to this table. Name type values are used on the Learner Name page.

Related Links

Person Info Page
Profile Info Page

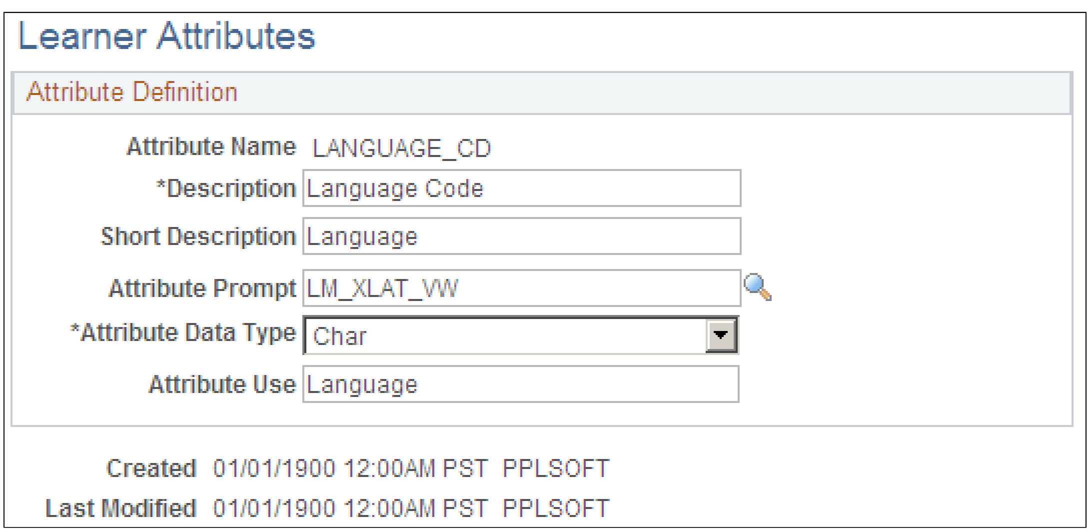
Learner Attributes Page

Use the Learner Attributes page (LM_ATTRIBS) to set up catalog search preferences that you can assign to learners.

Navigation:

Set Up ELM > **Users** > **Learner Attributes** > **Learner Attributes**

This example illustrates the fields and controls on the Learner Attributes page.



See Internal Learners - Learner Attributes Page.

Field or Control	***Description***
Attribute Name	Enterprise Learning Management provides the following learner attribute definitions: • *Language Code* for specifying the learner's language choice for learning. • *Preferred Delivery Method* for specifying which content delivery method the learner prefers. • *PeopleSoft Calendar Filter* for specifying the preferred type of learning displayed on the calendar view of the My Learning page. • *Program Type* for specifying the default value of the Learning Type field for the Advanced Search of the Find Learning page. • *Program Display Option* for specifying whether search results on the Find Learning page appear expanded or collapsed. • *Rows Displayed* for specifying the number of rows of results to display after a catalog search. • *Search Attribute* for specifying whether an Advanced Search or Basic Search link should appear on learners' catalog search pages. • *Program Display Option* for specifying whether to display or hide section requirements on the Program Details page that learners can access when searching the catalog. • *Training Region* for specifying the preferred training region that the system uses to identify classes for the automatic enrollment of planned and waitlisted learning.
Description and **Short Description**	Enter a description and short description for the learner attribute. The description appears as a prompt value when administrators select learning preferences on the Learner Attributes page.
Attribute Prompt	Select the PeopleSoft table against which you want this learner attribute to prompt on the Learner Attributes page. Learners can select from the delivered values through the self-service Learning Preferences component, so you should not modify or delete these values. For a new learner attribute, you must build the prompt table and insert values by using PeopleSoft Application Designer. You can define attribute values in user configured prompt tables (for value type DEC, DATE, LONG) or as translate values (for value type CHAR use LM_XLAT_VW view).

Field or Control	*Description*
Attribute Data Type	Select a learner attribute data type. A data type sets the basic format for the field. Values are: *Char* (character), *Date* (date), *Dec* (decimal), and *Long* (long description).
Attribute Use	Describe why or how this learner attribute is used.

Processing Staged Data

Pages Used to Process Staged Data

Page Name	*Definition Name*	*Usage*
Process FullSync Data Page	LM_RNCTL_FULL_LOAD	Run the Process FullSync Data (LM_LD _STGDAT) Application Engine process to validate full sync data in the staging table, load validated data into Enterprise Learning Management, and delete data from the staging tables.
Process Asynchronous Data Page	LM_RNCTL_ASYNC	Run the Process Asynchronous Data (LM_LD_ASYNC) Application Engine process to validate asynchronous data in the staging tables, load validated data into Enterprise Learning Management, and delete data from the staging tables.

Understanding Staged Data Processing

Certain types of data that you import into Enterprise Learning Management through EIPs goes into intermediary staging tables before it is loaded into the system. A control value assigned to each row of incoming data identifies whether the data is from a full sync or an incremental sync EIP.

After an EIP imports data into the staging tables, you run a validation process to ensure that there are no data errors. Valid data can then be quickly loaded without the risk of errors. You can delete data in the staging tables as often as needed. The system uses a truncate command on supported platforms, and uses a delete command otherwise.

Staging tables are used for data that undergoes frequent changes or for which there is a high volume in Enterprise Learning Management. Steps for running the validation and load processes depend on whether you are importing data from a full sync EIP message or an incremental sync EIP message:

Full Sync Processing

The typical sequence for processing data from a full sync EIP is as follows:

1. Run the delete process to delete any existing full sync data from the staging tables.
2. Run the full sync EIP data publish message from the external application, such as PeopleSoft HR, to import data into ELM staging tables.
3. Ensure the full sync message has completed processing in PeopleSoft HCM and Enterprise Learning Management, and that no errors exist. If errors exist, resolve them before you continue.
4. Use the Process FullSync Data component to run the validation process.
5. View the log file for errors and ensure the data is corrected.

   If you are satisfied, continue to the next step. Otherwise, correct the errors and return to step one.

   Note: Make the corrections in the system of record. For example, if you are importing person data and information is missing, you may need to contact the HR administrator.

   ---

6. Run the upload process to load the validated data into the application tables.
7. Run the delete process to remove the full sync data from the staging tables.

Note: Rerunning a full sync EIP that uses a staging table does not delete data that resides only in Enterprise Learning Management, such as learner IDs, job codes, and learner department assignments.

Incremental Sync Processing

When incremental sync EIP messages import data into the staging tables in Enterprise Learning Management, a sequence log table captures the messages in sequence. When you initiate the validation process, data is validated and loaded in the order in which it was received.

When you process asynchronous data, the system automatically validates all incremental sync data in the staging table and loads the valid data. After the process is complete, you can check the message log files for errors. The system provides an option to automatically delete incremental sync data in the staging tables after the upload.

To ensure consistency between the data imported into Enterprise Learning Management and data in the source database, schedule the validation and load process for asynchronous data to run at a regular interval, such as every hour or every day. A minimum frequency of daily is recommended.

Prerequisite for Processing Staged Data

Run the full sync EIP for the data you want to import before running any processes for staged data.

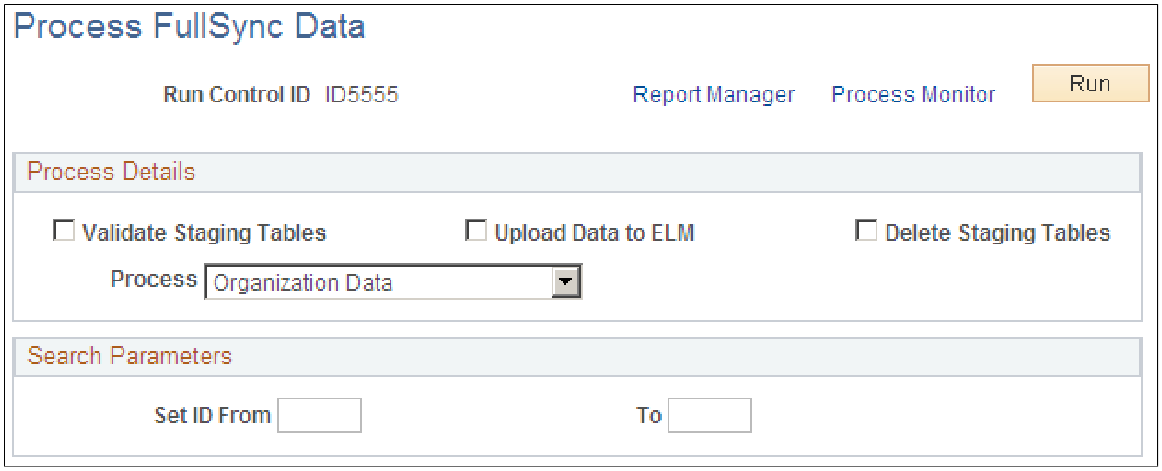
Process FullSync Data Page

Use the Process FullSync Data page (LM_RNCTL_FULL_LOAD) to run the Process FullSync Data (LM_LD_STGDAT) Application Engine process to validate full sync data in the staging table, load validated data into Enterprise Learning Management, and delete data from the staging tables.

Navigation:

Set Up ELM > **Process FullSync Data** > **Process FullSync Data**

This example illustrates the fields and controls on the Process FullSync Data page.



You can validate data, load validated data into Enterprise Learning Management, and delete data in the staging tables in separate processes or at the same time. The process runs in this order, for all selected check boxes: validate, upload, and delete.

Field or Control	***Description***
Validate Staging Tables	Select to validate the imported data. The process looks for data with missing required values and missing rows. For example, a person record with no name record or an employment record with no job record. The system stamps all valid data with a status of valid, and reports all errors in the process scheduler log.
Upload Data to ELM	Select to move validated data from the staging tables to the Enterprise Learning Management application tables. **Note:** The system loads all valid data, including data that is future effective-dated. However, learners who are future effective-dated do not appear in the Internal Learners search page until their effective date is current.
Process	Select the type of data to validate, load, or delete. Your selection here may cause other data entry fields to display on this page.
SetID From and SetID To	These fields appear only when you select *Organization Data* in the Process field. Enter the lowest and highest SetID values that you want to process.

Field or Control	***Description***
Employee ID From and Employee ID To	These fields appear only when you select *Person Data* in the Process field. Enter the lowest and highest employee ID values that you want to process. Create unique employee ID ranges and run these ranges in separate processes, being mindful of the human resource database's collation sequence (for example, how it sorts data). The process is designed to run multithreaded, utilizing temporary tables to reduce contention. The groups of IDs must be unique have no overlap. **Note:** Consider having a technical person use SQL queries to verify that the ID ranges are unique and encompass all employee IDs. To identify your system's employee ID range, use the following SQL statements: SELECT MIN(LM_HR_EMPLID), MAX(LM_HR_EMPLID) FROM PS_LM_STG_PRS —for person load, and SELECT MIN(LM_HR_EMPLID), MAX(LM_HR_EMPLID) FROM PS_LM_STG_PRS_ATT —for workforce load.
Delete Staging Tables	Select to delete the full sync data from the staging tables. This option uses a truncate command on supported platforms, and uses a delete command otherwise. **Note:** For organizations with large database volumes of approximately 50,000 employees or more, and no truncate support, have a database administrator drop and recreate the staging tables. Dropping and recreating the tables is more efficient than using the delete command.

FullSync Messages

Each process that you can run using the Process FullSync Data page is associated with a specific FullSync message that is used to import data into ELM.

Process	***Associated FullSync Message***
Catalog Data	JPM_CAT_FULLSYNC
Cost Acknowledgement	COST_ACK_FULLSYNC
DIF Balance	DIF_BALANCE_FULLSYNC
HR Company Data	COMPANY_FULLSYNC
Instance Qualifier Data	JPM_JP_QUAL_FULLSYNC

Process	***Associated FullSync Message***
Organization Data	DEPT_FULLSYNC
Person Data	PERSON_BASIC_FULLSYNC
Person of Interest Types	POI_TYPE_TBL_FULLSYNC
Persons of Interest Data	PERS_POI_FULLSYNC
Profile Data	JPM_JP_FULLSYNC
Profile Type	JPM_JP_TYPE_FULLSYNC
Training Hour Acknowledgment	TRN_HOUR_ACK_FULLSYNC
User Photo	USER_PHOTO_FULLSYNC
Workforce Data	WORKFORCE_FULLSYNC

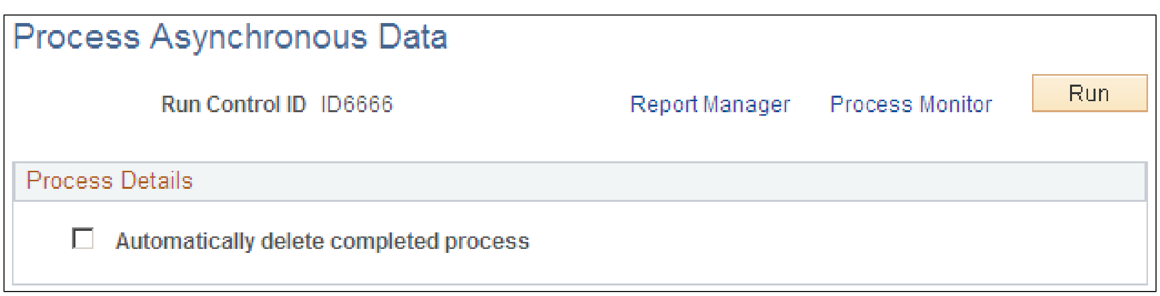
Process Asynchronous Data Page

Use the Process Asynchronous Data page (LM_RNCTL_ASYNC) to run the Process Asynchronous Data (LM_LD_ASYNC) Application Engine process to validate asynchronous data in the staging tables, load validated data into Enterprise Learning Management, and delete data from the staging tables.

Navigation:

Set Up ELM > **Process Asynchronous Data** > **Process Asynchronous Data**

This example illustrates the fields and controls on the Process Asynchronous Data page.



When you process asynchronous data, the system automatically validates all data in the staging table and loads the validated data. To have the system delete the incremental sync data in the staging table after it loads the data, select the check box labeled **Automatically delete completed process.**

Note: If the Allow Auto Enrollment check box is selected on the Install Defaults - Enrollment page, the system initiates the LM_AENRL_AAF batch process. This process invokes the Active Analytics Framework (AAF) to evaluate learners against the defined AAF policies for HCM status or job changes and automatically enrolls learners into learning items accordingly.

Related Links

Install Defaults – Enrollment Page

Setting Up Active Analytics Framework for Automatic Enrollment Due to HCM Status and Job Changes

Defining Department Information

Enterprise Learning Management integrates with the HR system to import department data. Because the HR system is the system of record for department data, you cannot edit imported data within Enterprise Learning Management; you must first make changes in the HR system. The incremental sync EIP ensures that changes made in HR are imported into Enterprise Learning Management.

In Enterprise Learning Management, you can select a department's learning environment and enter a discount value.

Page Used to Define Department Information

Page Name	***Definition Name***	***Usage***
Review Departments Page	LM_DEPARTMENT	View department information imported from HR. You can also assign a learning environment and payment discount.

Prerequisites for Defining Department Information

Before you define department information:

- Define learning environments.
- Define a default learning environment on the Install Defaults - Basic Data page.

  Specify the default learning environment in the New User Learning Environment field.

Review Departments Page

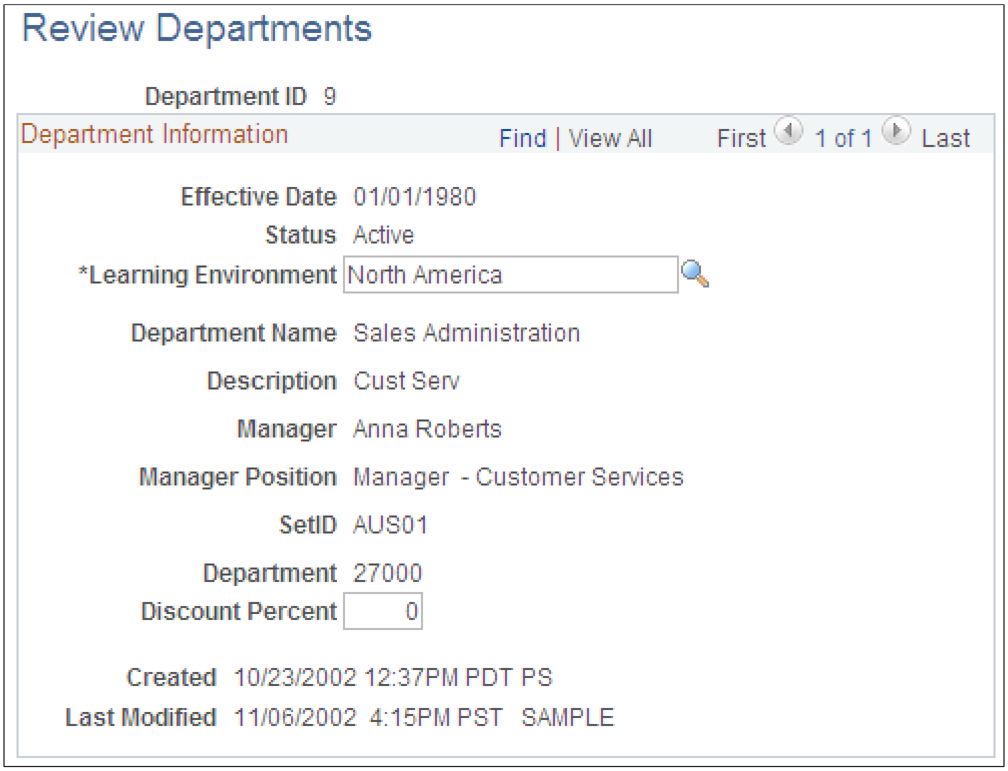
Use the Review Departments page (LM_DEPARTMENT) to view department information imported from HR.

You can also assign a learning environment and payment discount.

Navigation:

Enterprise Learning > **Organizations** > **Review Departments** > **Review Departments**

This example illustrates the fields and controls on the Review Departments page.



Field or Control	***Description***
Learning Environment	Select the department's learning environment. This field initially displays the learning environment defined in the **New User Learning Environments** field on the Install Defaults - Basic Data page. Internal learners inherit their department's learning environment organization when you import internal learner data. Ensure that department learning environment values are correct before you load learner data. See Install Defaults – General Page.
Manager	Displays the primary manager ID for this department.
Manager Position	Displays the position of the primary manager for this department.
SetID	Displays the SETID with which this department is associated.
Department	Displays the department code for this department.
Discount	To grant a discount on enrollment and drop fees to all learners in this department, enter the discount percentage here.

Defining Customers

To set up customer profiles, use the Define Customers (LM_CUSTOMER_MAIN) component . You can use the LM_CUSTOMER_MAIN component interface to load data into the tables for this component.

Customers represent organizations with learners who are external to your organization. All customer data is manually entered and maintained. There are no delivered EIPs for synchronizing customer data with other enterprise systems.

Pages Used to Define Customers

Page Name	***Definition Name***	***Usage***
Customer Profile Page	LM_CUSTOMER_MAIN_3	Define learning-related customer profile information.
Customers - Address History Page	LM_ORG_ADDR2	Define customer address information.
Edit Address Page	EO_ADDR_USA_SEC	Edit customer address information.
Payment Information Page	LM_MOP_ADMIN	Set up default payment methods, training units pools, chargeback accounts, and revenue accounts for a customer organization.

Prerequisites for Defining Customers

Before you define customer organizations you must:

- Define learning environments.
- Define contact method types.
- Set up financial ChartField data if your customers can use the charge back payment method for enrollment fees.

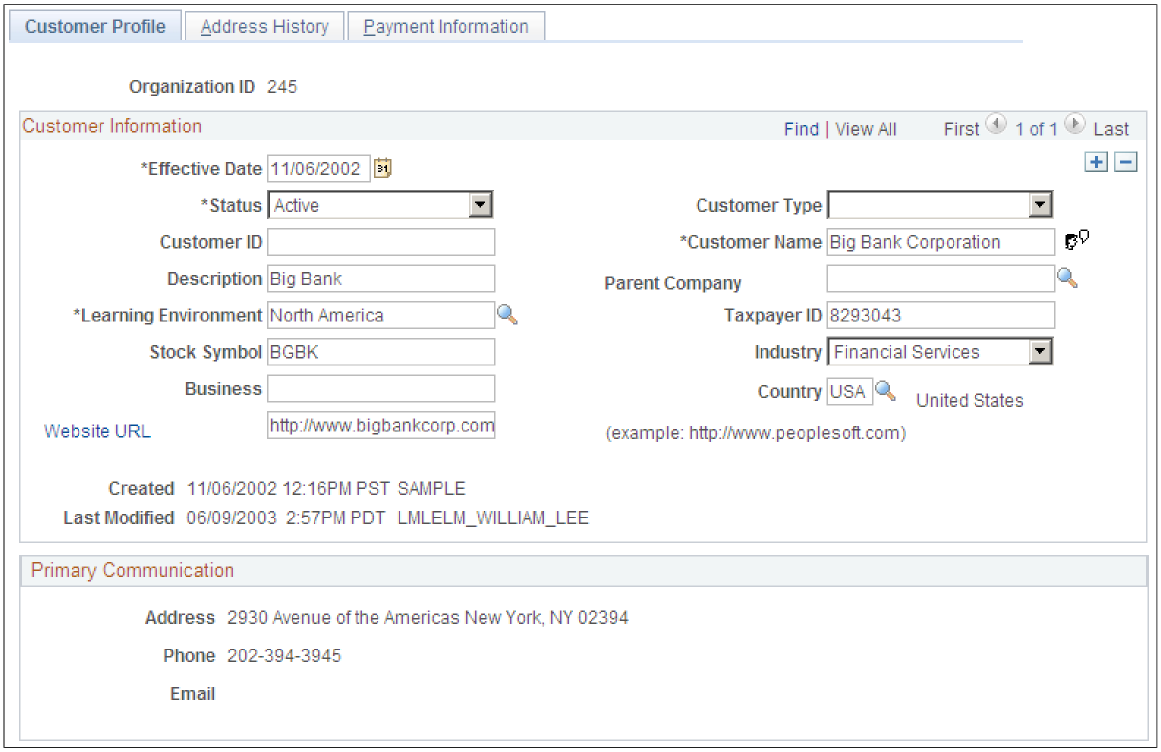
Customer Profile Page

Use the Customer Profile page (LM_CUSTOMER_MAIN_3) to define learning-related customer profile information.

Navigation:

Enterprise Learning > **Organizations** > **Customers** > **Customer Profile**

This example illustrates the fields and controls on the Customer Profile page.



Field or Control	*Description*
Customer ID	Enter the customer ID that other enterprise systems (such as financials or customer relationship management systems) use to uniquely identify the customer.
Learning Environment	Enter a learning environment with which you associate the customer. Learning environment values are set up on the Learning Environment page. See Defining Learning Environments.
Parent Company	If this customer is associated with a parent company, specify that company here. **Note:** You must first define the parent company as a separate customer.
Country	Enter the country with which this customer is primarily associated. Country codes are synchronized from the HR country code table EIP.
Stock Symbol	Enter the customer's stock symbol, if any.
Industry	Enter the type of industry with which this customer is associated. Industry values are delivered with your system.

Field or Control	*Description*
Business	Enter a business code.
Customer Type	Enter the customer type for this customer. Customer type values are delivered with your system.
Website URL (website uniform resource locator)	Enter the customer's website URL, if any.

Primary Communication

The system displays the customer's primary communication information, as defined on the Address History page.

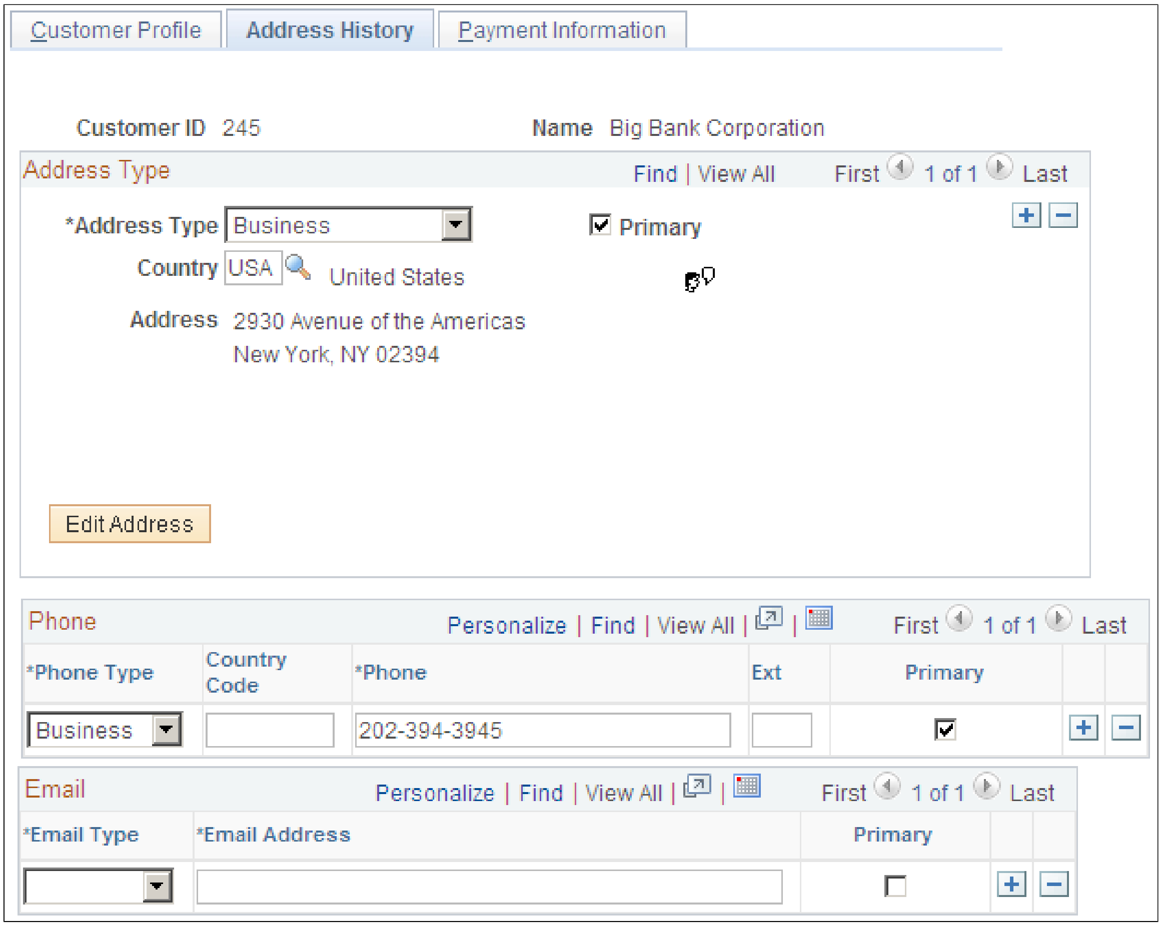
Customers - Address History Page

Use the Customers - Address History page (LM_ORG_ADDR2) to define customer address information.

Navigation:

Enterprise Learning > **Organizations** > **Customers** > **Address History**

This example illustrates the fields and controls on the Address History page.



Field or Control	***Description***
Address Type	Select an address type. Address type values are defined on the Contact Method Type page.
Primary	Select to identify an address as primary. Every customer must have one primary address.
Country	Enter the country for the address. You must enter a country value if you want to edit the address.
Address and **Edit Address**	Enter a country value if one is not specified, and click the **Edit Address** link to add or update the address information on the Edit Address page.

Phone

Field or Control	*Description*
Phone Type	Select a phone type. Phone type values are defined on the Contact Method Type page.
Country Code	Enter the country for the phone type.
Phone	Enter the phone number.
Ext (extension)	Enter the phone number extension, if any.
Primary	Select to identify a phone number as primary. If you have one or more phone numbers for a customer, one must be marked as primary.

Email

Field or Control	*Description*
Email Type	Select an email type. Email type values are defined on the Contact Method Type page.
Email Address	Enter the email address.
Primary	Select to identify an email address as primary. If you have one or more email addresses for a customer, one must be marked as primary.

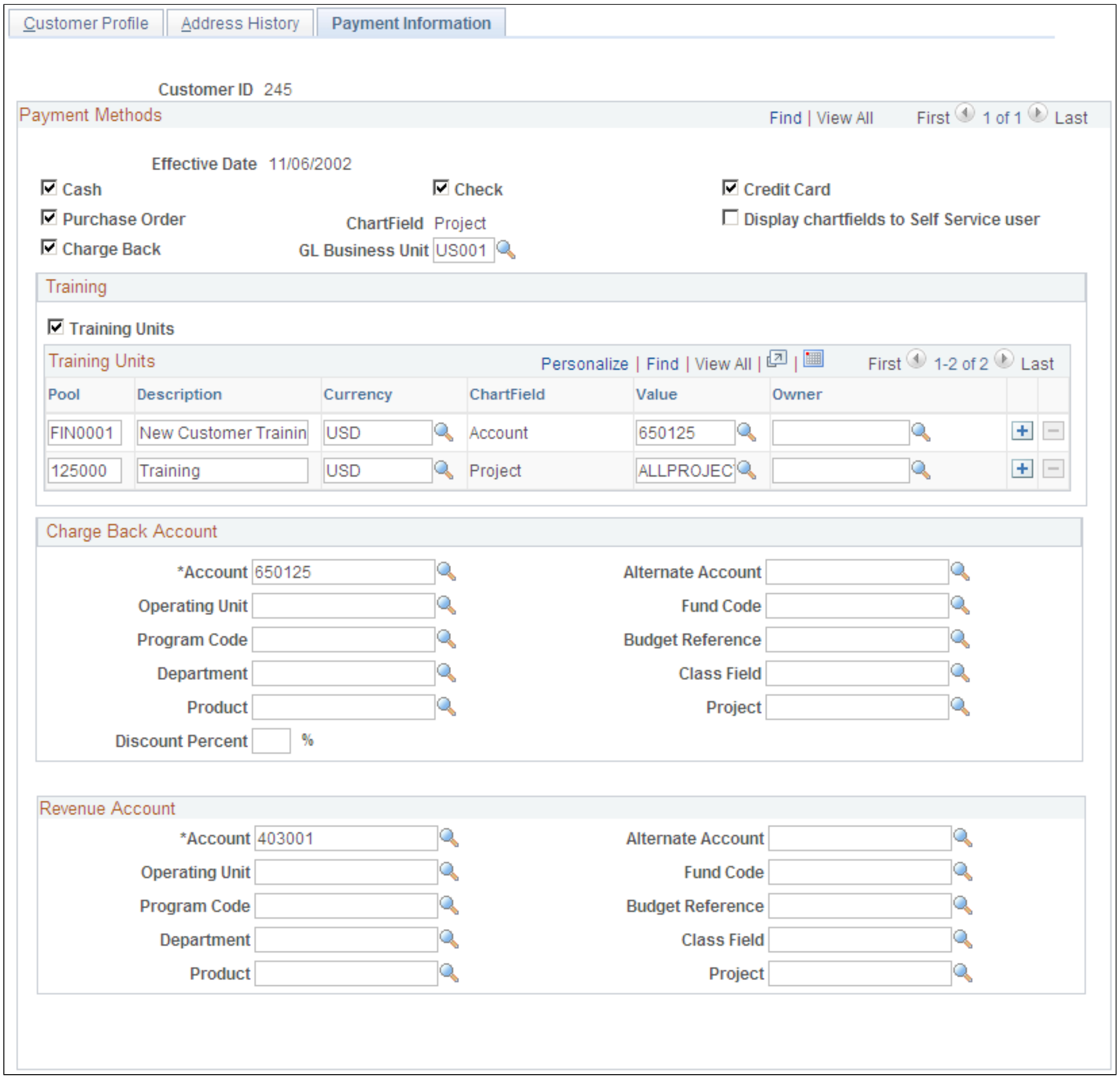
Payment Information Page

Use the Payment Information page (LM_MOP_ADMIN) to set up default payment methods, training units pools, chargeback accounts, and revenue accounts for a customer organization.

Navigation:

Enterprise Learning > **Organizations** > **Customers** > **Payment Information**

This example illustrates the fields and controls on the Payment Information page.



Payment Methods

External learners can only use the payment methods that you define for the customer. The payment methods that are selected by default are inherited from the Learning Environments - Defaults page. You can modify the default selections here.

See Understanding Payment Method Setup.

Field or Control	***Description***
Cash, Check, Credit Card, Purchase Order, and Charge Back	Select the valid payment methods for the customer organization.

Field or Control	*Description*
GL Business Unit (general ledger business unit)	Select a general ledger business unit. The customer organization inherits ChartField values for chargeback and revenue accounts from the general ledger business unit. Define ChartField values for general ledger business units on the Business Unit Accounts page. This field is required if you select the **Purchase Order, Charge Back,** or **Training Units** option.
Display chartfields to Self Service user	Select to display ChartFields to self-service learners. If ChartFields appear, learners and managers can change the ChartField values when using the self service pages to enroll. Disable this option if you do not want learners or managers to modify ChartField values.
Training Units	Select to enable training units as a valid payment method for the customer organization.
Pool	Enter a name for the training unit pool. Names must be unique within a customer organization, but multiple customer organizations can use the same training unit pool name.
Description	Enter a description of the training unit pool.
Currency	Select the currency for the training unit pool. This currency must match the currency of a class or program fee for a learner to successfully enroll. When training units are used to pay for enrollment, the system converts the training units to a currency value when it writes the payment transaction to the subledger. The currency value is a percentage of the overall cost of the training units divided by the number of training units that is charged for the class fee, program fee, or drop fee. For example, if a customer organization buys 100 training units for 100.00 USD and a learner needs five training units to enroll in a class, the cost of the class in currency value is 5.00 USD.
ChartField	Displays the ChartField that is used for training units. Select the ChartField for training units on the Payment Methods page.
Value	Select a ChartField value. The ChartField values that you can select are any values with an active status on the Chartfield Values page.

Field or Control	Description
Owner	Select an owner for the training unit pool. The owner can be anyone from the customer organization. Owners of training unit pools must approve any enrollment or registration request for a learner that uses the training unit pool when the system requires payment approval to enroll in the class or register in the program. Define approval types for classes on the Classes - Class Details page. Define approval types for programs on the Maintain Programs - Details page. A learner's enrollment or registration in a class or program is not confirmed until the owner gives payment approval. Payment approval is not required if no owner is assigned to the training unit pool or if payment approval is not required to enroll in the class or register in the program. Owners of training unit pools can approve enrollment and registration requests by using the approvals page. See Understanding Enrollment and Registration.

Charge Back Account

Specify chargeback account information for the customer organization. The ChartFields that the system displays depend on which ChartFields are selected for use on the Chartfield Configuration page. All fields that are in this group box are uneditable until a general ledger business unit is selected in the Payment Methods group box. The system populates the fields with the default ChartField values as soon as you select a general ledger business unit. The ChartField values that you can select for each ChartField are any values with an active status on the Chartfield Values page. Administrators can modify these values during enrollment or registration. Learners and managers can modify these values only if you select the **Display chartfields to Self Service user** option.

Field or Control	Description
Discount	Enter a discount percentage for the customer organization. The discount applies to all payment methods except training units, because there is a built in discount with this feature. The system applies the discount to all class and program currency prices and drop charges. All learners in the customer organization receive the discount.

Revenue Account

Specify revenue account information for the customer organization. The ChartFields that the system displays depend on which ChartFields are selected for use on the Chartfield Configuration page. All fields that are in this section are uneditable until a general ledger business unit is selected in the Payment Methods group box. The system populates the fields with the default ChartField values as soon as you select a general ledger business unit. You can modify the default ChartField values. The ChartField values that you can select for each ChartField are any values with an active status on the Chartfield Values page. These values cannot be modified during enrollment or registration.

Related Links

Understanding Payment Method Setup
Setting Up Financial ChartField Data

Setting Up Vendor Data

To set up product types, pricing types, and product packaging types for vendors, use the Product Types (LM_PROD_TYPE) component, Pricing Types (LM_PRICING_TYPE) component, and Product Packaging Types (LM_UNITS) component.

Vendors represent organizations and companies that are external to your organization from which you purchase goods and services, such as providers of web-based training, textbooks, instructor staffing, and facility rentals.

Pages Used to Set Up Vendor Data

Page Name	***Definition Name***	***Usage***
Product Types Page	LM_PROD_TYPE	Set up vendor product types.
Pricing Types Page	LM_PRICING_TYPE	Set up vendor pricing types.
Product Packaging Page	LM_UNITS_MEASURE	Set up vendor product packaging types.

Related Links

Defining Vendors

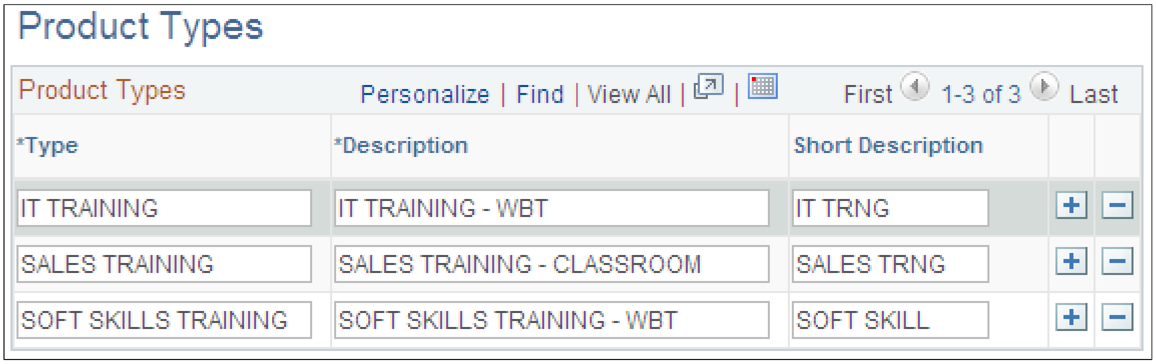
Product Types Page

Use the Product Types page (LM_PROD_TYPE) to set up vendor product types.

Navigation:

Set Up ELM > **Vendors** > **Product Types** > **Product Types**

This example illustrates the fields and controls on the Product Types page.



Field or Control	Description
Type	Enter the type of product that a vendor may offer.
Description and **Short Description**	Enter a description and short description for the product. These values appear as prompt and related display values throughout the system.

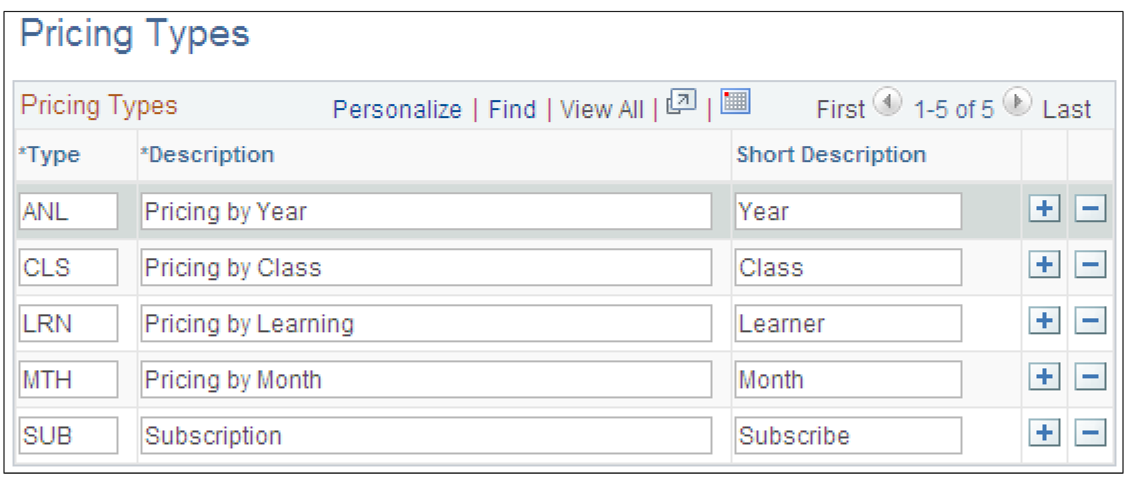
Pricing Types Page

Use the Pricing Types page (LM_PRICING_TYPE) to set up vendor pricing types.

Navigation:

Set Up ELM > **Vendors** > **Pricing Types** > **Pricing Types**

This example illustrates the fields and controls on the Pricing Types page.



Field or Control	Description
Type	Enter a price model value of one to three characters in length for each price model that you define.

Field or Control	*Description*
Description and **Short Description**	Enter a description and short description for the pricing model. The description appears on the Vendor Products page.

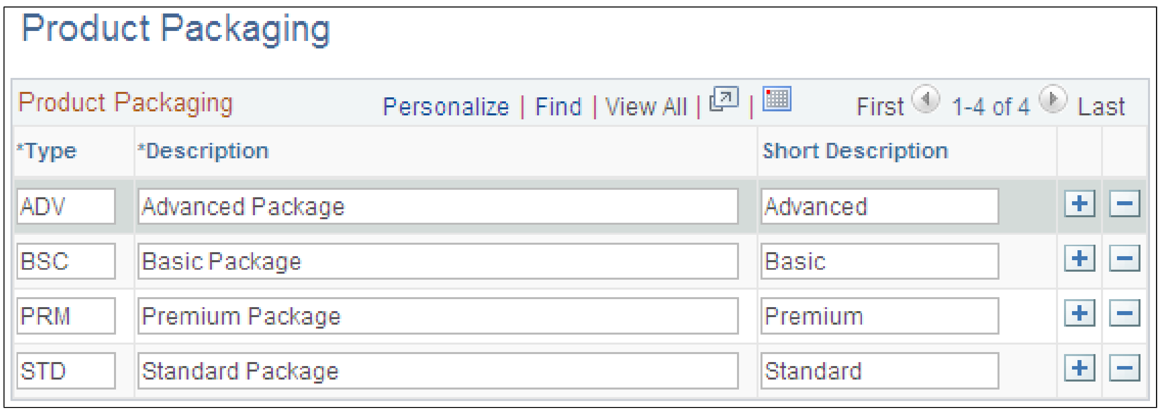
Product Packaging Page

Use the Product Packaging page (LM_UNITS_MEASURE) to set up vendor product packaging types.

Navigation:

Set Up ELM > **Vendors** > **Product Packaging** > **Product Packaging**

This example illustrates the fields and controls on the Product Packaging page.



Field or Control	*Description*
Type	Enter the various types of packaging units that a vendor might use to measure the services that it provides.
Description and **Short Description**	Enter a description and short description for the packaging unit. These values appear as prompt and related display values throughout the system.

Defining Vendors

To set up vendor profiles use the Define Vendors (LM_VENDOR_MAIN) component.

Create a vendor profile for each organization from which you purchase goods and services for classes and programs. All vendor data is manually entered and maintained. You can associate vendors with the instructors, delivery methods, materials, and facilities that you define later.

Pages Used to Define Vendors

Page Name	***Definition Name***	***Usage***
Vendor Profile Page	LM_VENDOR_MAIN	Define vendor profile information.
Vendors - Address History Page	LM_VENDOR_ADDR	Define address details specifying the vendor's primary address.
Edit Address Page	EO_ADDR_USA_SEC	Edit vendor address information.
Vendor Products Page	LM_VNDR_PROD	Define learning-related vendor product information.

Related Links

Setting Up Vendor Data

Prerequisites for Defining Vendors

Before you can set up vendors, you must:

- Set up vendor product types.
- Set up vendor pricing types.
- Set up vendor product packaging types.

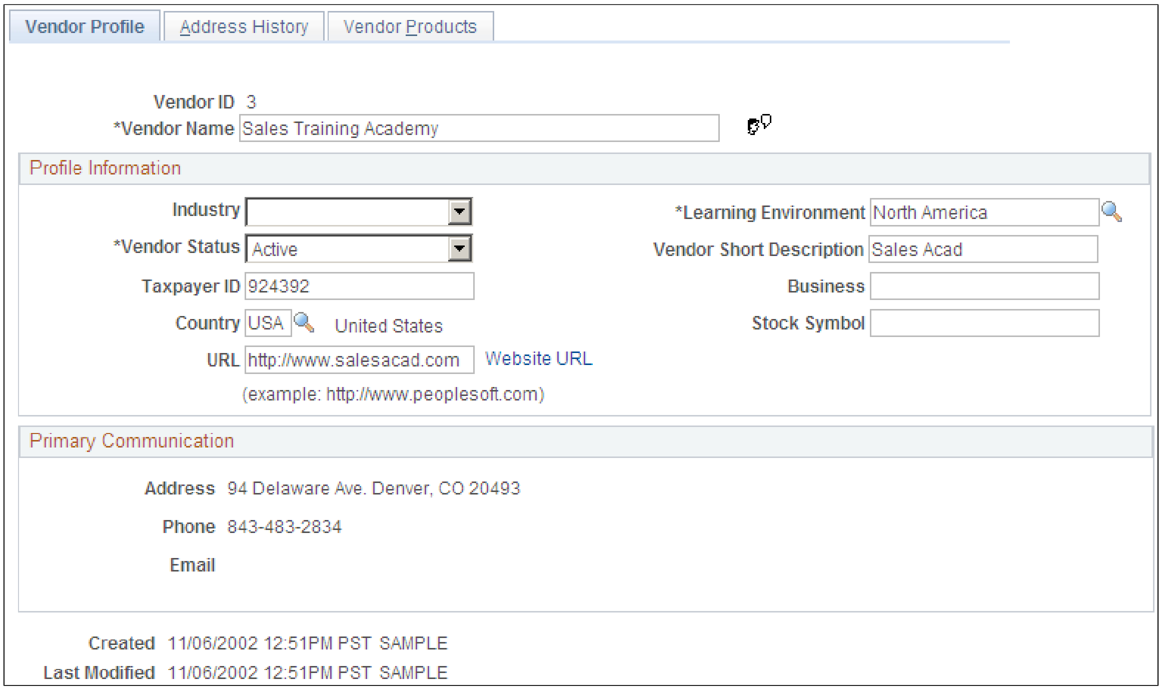
Vendor Profile Page

Use the Vendor Profile page (LM_VENDOR_MAIN) to define vendor profile information.

Navigation:

Enterprise Learning > **Organizations** > **Vendors** > **Vendor Profile**

This example illustrates the fields and controls on the Vendor Profile page.



Field or Control	***Description***
Learning Environment	Enter a learning environment to associate with the vendor. Learning environment values are set up on the Learning Environment page. See Defining Learning Environments.
Vendor Status	Select the status of this vendor: *Active* or *Inactive.*
Industry	Enter the type of industry with which this vendor is associated. Industry values are delivered with the system.
Country	Enter the country with which this vendor is associated. Country codes are synchronized from the HR country code table EIP.
Business	Enter a business code.
Stock Symbol	Enter the vendor's stock symbol, if any.
Website URL (website uniform resource locator)	Enter the vendor's website URL, if any.

Primary Communication

The system displays the vendor's primary communication information, as defined on the Address History page.

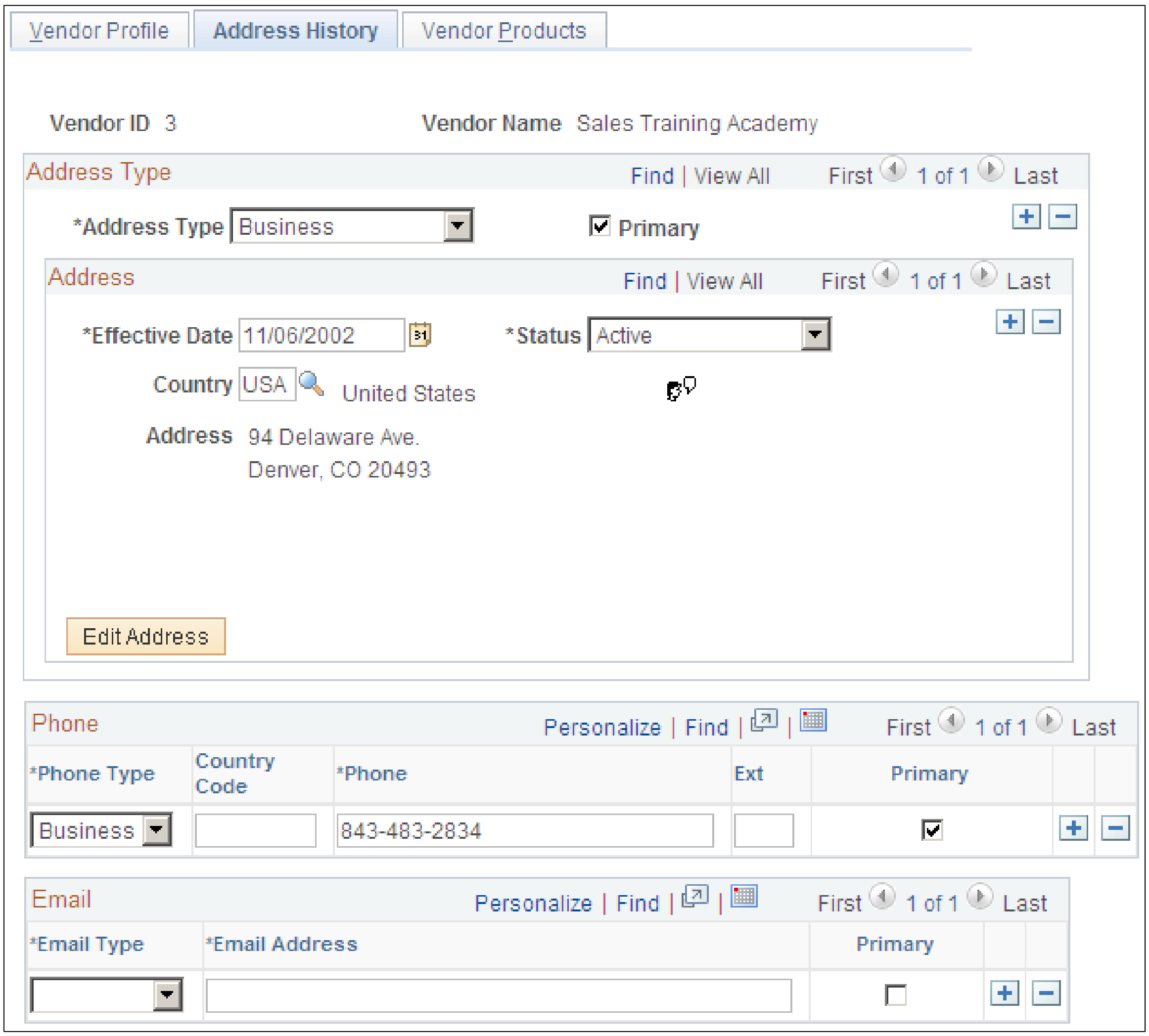
Vendors - Address History Page

Use the Vendors - Address History page (LM_VENDOR_ADDR) to define address details specifying the vendor's primary address.

Navigation:

Enterprise Learning > **Organizations** > **Vendors** > **Address History**

This example illustrates the fields and controls on the Address History page.



Field or Control	Description
Address Type	Select an address type. Address type values are defined on the Contact Method Type page.
Primary	Select to identify an address as primary. Every vendor must have a primary address.
Effective Date and **Status**	Enter the effective date and status for the address.

Field or Control	***Description***
Country	Enter the country for the address. You must enter a country value before you can edit the address.
Address and **Edit Address**	Enter a country value if one is not specified, and click the **Edit Address** link to add or update the address information on the Edit Address page.

Phone

Field or Control	***Description***
Phone Type	Select a phone type. Phone type values are defined on the Contact Method Type page.
Country Code	Enter the country for the phone type.
Phone	Enter the phone number.
Ext (extension)	Enter the phone number extension, if any.
Primary	Select to identify a phone number as primary. If you have one or more phone numbers for a vendor, you must mark one as primary.

Email

Field or Control	***Description***
Email Type	Select an email type. Email type values are defined on the Contact Method Type page.
Email Address	Enter the email address.
Primary	Select to identify an email address as primary. If you have one or more email addresses for a vendor, you must mark one as primary.

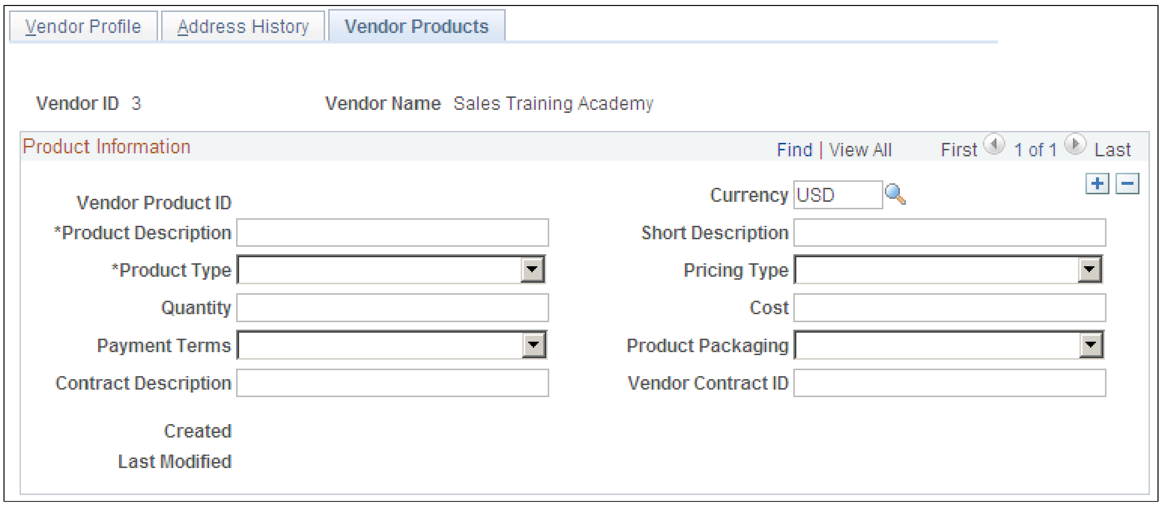
Vendor Products Page

Use the Vendor Products page (LM_VNDR_PROD) to define learning-related vendor product information.

Navigation:

Enterprise Learning > **Organizations** > **Vendors** > **Vendor Products**

This example illustrates the fields and controls on the Vendor Products page.



Field or Control	***Description***
Product Description and Short Description	Enter a description and short description for the vendor's product offering.
Product Type	Enter a product type. Product type values are defined on the Product Types page.
Pricing Type	Enter a pricing type model for this product. Pricing model values are defined on the Pricing Types page.
Quantity	Enter the number of offerings for this product.
Cost	Enter the cost of this product, for one product packaging unit. If you associate this product with a course, the classes for that course inherit the cost that you define here. The amount displays on the Class Costs page and is included in the total estimated costs that also appear on that page.
Payment Terms	Enter the terms in which payment for this product is required. Payment terms are delivered with the system as translate values and you can modify them.

Field or Control	***Description***
Product Packaging	Enter the product packaging unit of measure for this product. Product packaging values are defined on the Product Packaging page.
Currency	Enter the type of currency for this product. Currency codes are delivered with the system.
Contract Description	Enter a brief description of the contract that you have for the product.
Vendor Contract ID	Enter the vendor contract ID code, if any.

(FRA) Defining Financing Organizations

To set up financing organizations for France, use the Financing Organizations (LM_FIN_ORG_MAIN) component. When defining class costs, administrators can specify which costs are financed and can select the financing organization.

This topic lists the pages used to define financing organizations. The pages contain a subset of the same fields that you use to define customers.

Pages Used to Define Financing Organizations

Page Name	***Definition Name***	***Usage***
Organization Profile	LM_FIN_ORG_MAIN	Define a financing organization's name and learning environment.
Organization Address	LM_FIN_ORG_ADDR	Define a financing organization's address.

(FRA) Defining Contract Types

To define contract types for French learners, use the Contract Types (LM_CONTRACT_TYP) component. Contract types are required to support professionalization contract maintenance for French learners within ELM.

Page Used to Define Contract Types

Page Name	***Definition Name***	***Usage***
Contract Types Page	LM_CONTRACT_TYP	Define professionalization contract types.

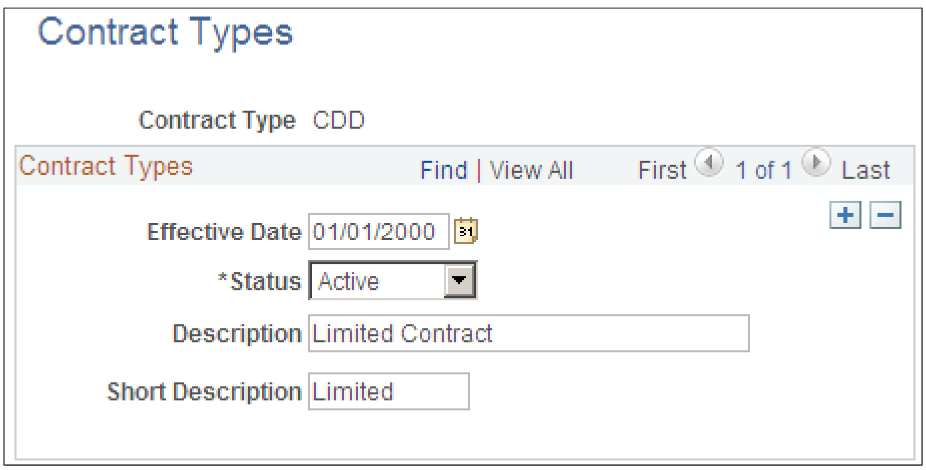
Contract Types Page

Use the Contract Types page (LM_CONTRACT_TYP) to define professionalization contract types.

Navigation:

Set Up ELM > **Resources** > **Contract Types**

This example illustrates the fields and controls on the Contract Types page.



Use this page to enter an effective date, status and description for a professionalization contract type.

Reviewing and Updating Internal Learner Data

Pages Used to Review and Update Internal Learning Data

Page Name	***Definition Name***	***Usage***
Person Info Page	LM_PERSON_INT	Review information about the learner, such as name and language code. You can also assign a preferred communication method.

Page Name	***Definition Name***	***Usage***
HR/Job Data Page	LM_PRSN_JOBDATA	View the internal learner's HR job and employment information. View and update the assigned learning environment.
Internal Learners - Address History Page	LM_PERSON_ADDR	Review internal learner address information.
Internal Learners - Learner Attributes Page	LM_LRNR_ATTRIBS	Define learning preferences for the learner, such as preferred language and content delivery method.
Internal Learners - Contracts Page	LM_LRN_CONTRACT	Review and update internal learner contract information.

Understanding Internal Learner Data

Internal learners are individuals who have a record in your HR system. Enterprise Learning Management creates profiles for internal learners when you use EIPs to import person data from an HR system. (If you import data from PeopleSoft HR 8.9 and above, internal learners include employees, contingent workers, and persons of interest.)

Learner profiles store learners' contact information and preferred communication method; job and employment information; address history; and contract information. Administrators can view, but not update imported information in Enterprise Learning Management. However, after profiles are created, you can update the assigned learning environment, select the preferred communication method, and specify learning preferences (learner attributes) for each learner.

Note: Contract information on the Contracts page can be edited only if you opt to maintain contracts in ELM for the associated learning environment.

When a learner is terminated in the HR system, the learner's status is set to Inactive in Enterprise Learning Management.

Prerequisites for Reviewing and Updating Internal Learner Data

Before you can view or update internal learner data, you must import the data from an HR system.

See Understanding Person and Organization EIPs.

Person Info Page

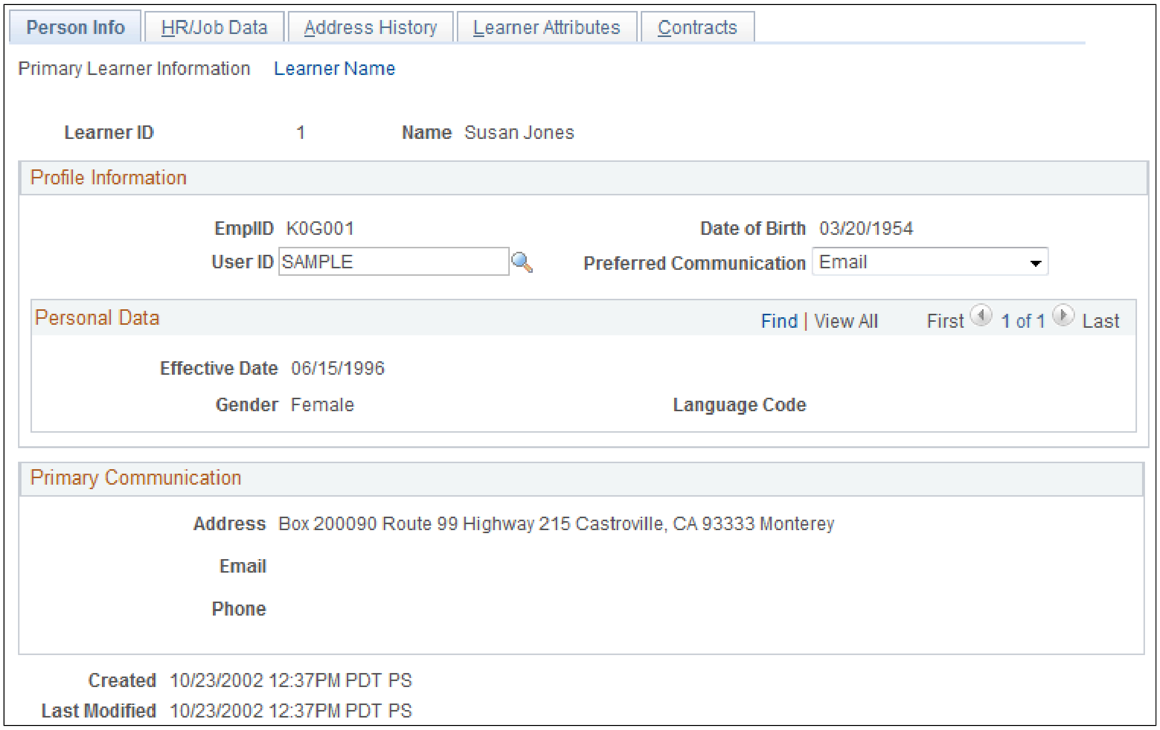
Use the Person Info (person information) page (LM_PERSON_INT) to review information about the learner, such as name and language code.

You can also assign a preferred communication method.

Navigation:

Enterprise Learning > **User Profiles** > **Internal Learners** > **Person Info**

This example illustrates the fields and controls on the Person Info: Primary Learner Information page.



Primary Learner Information: Profile Information

Field or Control	***Description***
EmplID (employee ID)	Displays the internal learner's employee ID number.
User ID	Displays the internal learner's user ID code. **Note:** During implementation, you can use delivered Datamover scripts to move user IDs between databases, such as from PeopleSoft HCM to Enterprise Learning Management. You can then activate the incremental sync USER_PROFILE message so that as new persons are added to the HR system, Enterprise Learning Management automatically retrieves the user IDs, along with the other person data.
Preferred Communication	Select the method of communication that the learner prefers. This is informational only.

Primary Learner Information: Personal Data

Field or Control	*Description*
Effective Date	Displays the effective date for the internal learner's gender and language code data.
Gender	Displays the internal learner's gender. Values are: *Female, Male,* and *Unknown.*
Language Code	Displays the internal learner's primary language.

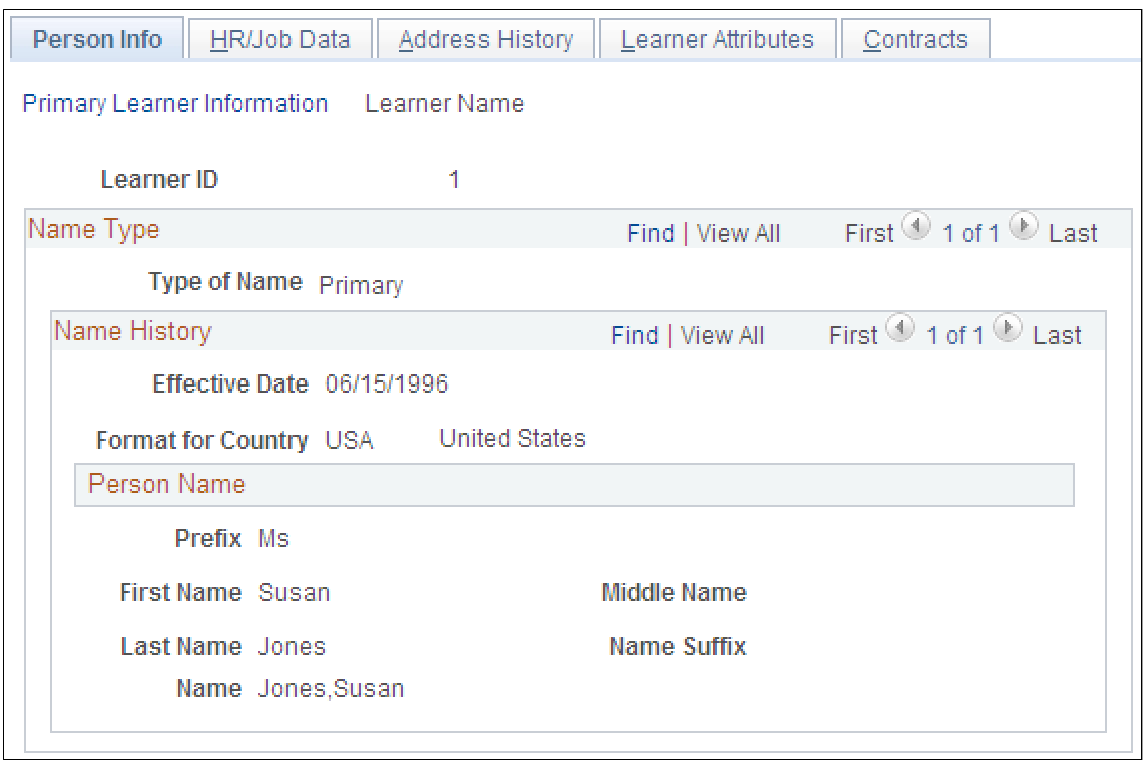
Primary Learner Information: Primary Communication

The system displays the internal learner's primary communication information, as defined on the Address History page.

Learner Name

Access the Person Info page. Click the **Learner Name** link.

This example illustrates the fields and controls on the Person Info: Learner Name page.



Field or Control	***Description***
Type of Name	Displays the name type. See Name Types Page.
Effective Date	Displays the effective date for each name that is within a name type.
Format for Country	Displays the country format. No code is connected with this field.

Learner Name: Person Name

The fields in the Person Name group box display the learner's name information.

HR/Job Data Page

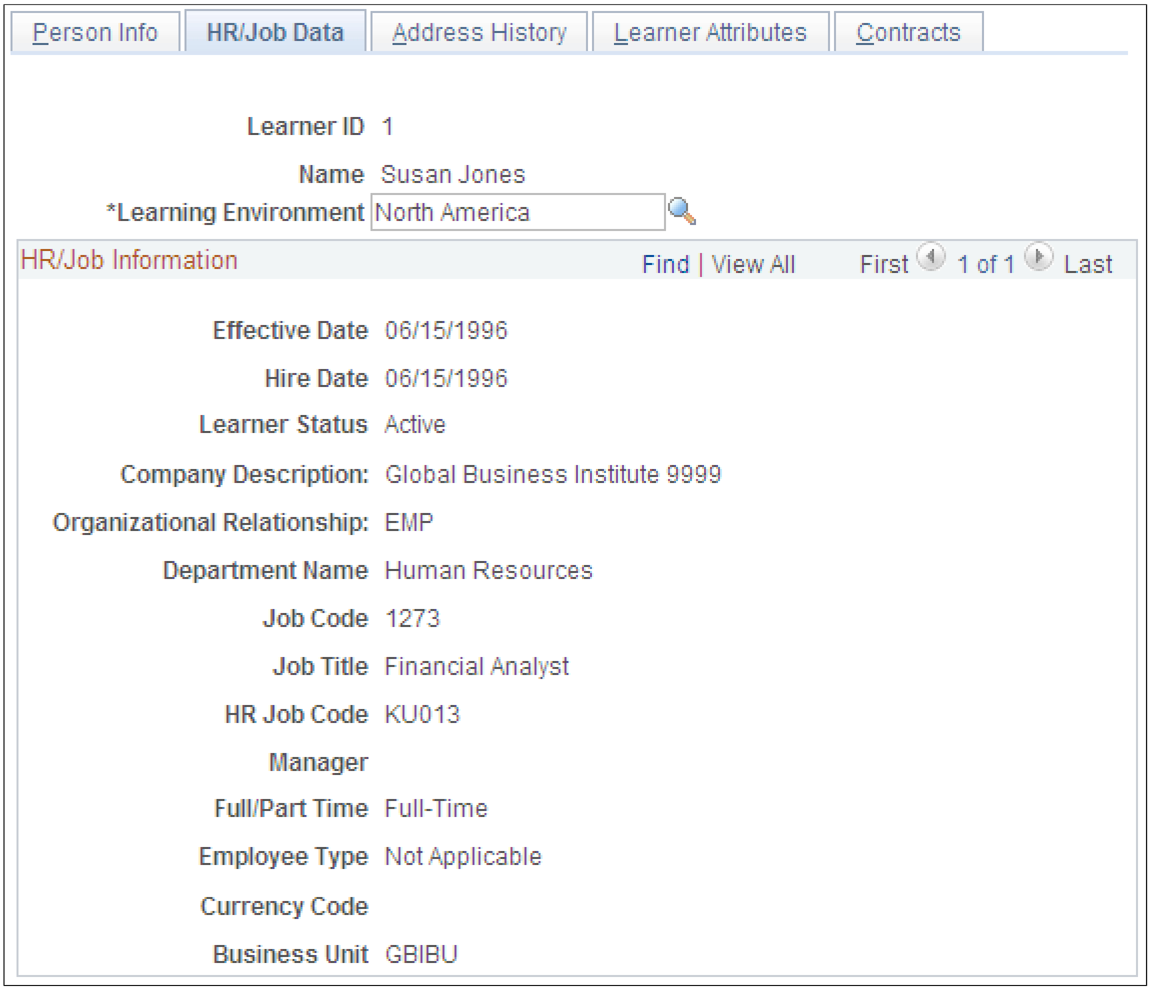
Use the HR/Job Data (Human Resources Job Data) page (LM_PRSN_JOBDATA) to view the internal learner's HR job and employment information.

View and update the assigned learning environment.

Navigation:

Enterprise Learning > **User Profiles** > **Internal Learners** > **HR/Job Data**

This example illustrates the fields and controls on the HR/Job Data page.



Field or Control	***Description***
Learner ID	The system assigns a sequential learner ID to the user when person data is uploaded to Enterprise Learning Management.

Field or Control	***Description***
Learning Environment	When you import learner data, the system assigns the learning environment that is associated with the learner's department. (If the learner has multiple jobs, the learning environment is based on the primary job.) If you import an internal learner for whom no department learning environment has been defined, the system assigns to the learner the learning environment selected on the Install Defaults - General page. See Install Defaults – General Page. Learning environments are defined on the Learning Environment - Basic Data page. **Important!** For users who are defined in your system as both internal learners and administrators, the learning environment on the HR/Job Data page controls the user's access as a learner, to the self-service pages. Learning environments that are assigned to the user through the Learning Environments (LM _LE_CMP) component control access to administrator tasks. The administrator can use the Set Learning Environment (LM_ ADMIN) component to select the learning environment for the current Enterprise Learning Management session. See Setting the Current Learning Environment.

HR/Job Information

Field or Control	***Description***
Effective Date	Displays the effective date for the job.
Hire Date	Displays the learner's hire date for the job.
Learner Status	Displays the learner's job status. The system sets the value to Inactive when an individual is terminated in the HR system.
Company Description	Displays the learner's company, if you have imported this information from HR.
Organizational Relationship	Identifies the learner's relationship to the organization as it pertains to this job. Values are *Employee, Contingent Worker,* and *Person of Interest.*
Person of Interest Type	Displays a value only if the organizational relationship is person of interest.

Field or Control	*Description*
Department	Displays the department with which the learner's job is associated in the HR system. For persons of interest without jobs, this field displays the default department that is identified on the Install Defaults page.
Job Code	Displays the job code for this record. When job data does not exist for a person of interest, *Not Applicable* is displayed here.
Job Title and **Full/Part Time**	Displays the learner's job and employment status.
Employee Type	Displays the learner's employee type, such as salaried or hourly. These values are defined in PeopleSoft HR and cannot be updated in Enterprise Learning Management.
Currency Code	Displays the currency code that is associated with this job, for this learner. This value is informational only.
Business Unit	Displays the HR business unit that is associated with this job, for this learner. When the learner enrolls or is enrolled by an administrator into a class that has charges, the system uses the business unit value to locate the corresponding mapped general ledger business unit. The system populates the self-service ChartField value fields (which define the department and account information to which you want to charge the class cost) by default to the values defined for the mapped general ledger business unit. If you have defined the chartfields to display during enrollment by selecting the Display check box on the Chartfield Configuration page, the default values appear to the learner or administrator and are available for edit.

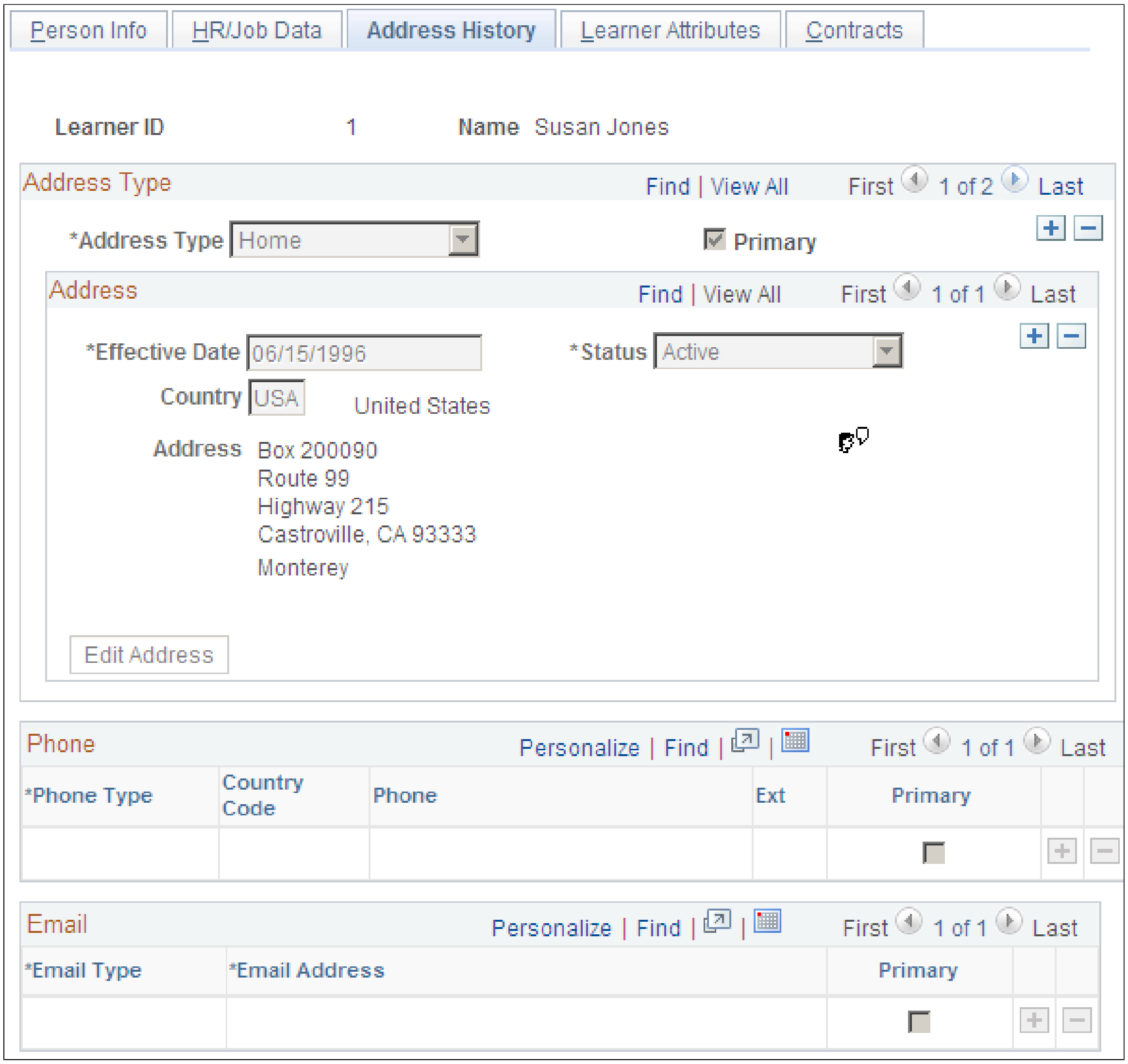
Internal Learners - Address History Page

Use the Internal Learners - Address History page (LM_PERSON_ADDR) to review internal learner address information.

Navigation:

Enterprise Learning > **User Profiles** > **Internal Learners** > **Address History**

This example illustrates the fields and controls on the Internal Learners - Address History page.



Field or Control	***Description***
Address Type	Displays the address type. Address type values are defined on the Contact Method Type page.
Primary	Identifies an address as primary.
Effective Date and **Status**	Displays the effective date and status for the address type.
Country	Displays the country for the address.
Address	Displays the internal learner's address information.

Phone

Field or Control	***Description***
Phone Type	Displays the phone type. Phone type values are defined on the Contact Method Type page.
Country Code	Displays the country for the phone type.
Phone	Displays the phone number.
Ext (extension)	Displays the phone number extension, if any.
Primary	Identifies a phone number as primary.

Email

Field or Control	***Description***
Email Type	Displays the email type. Email type values are defined on the Contact Method Type page.
Email Address	Displays the email address.
Primary	Identifies an email address as primary.

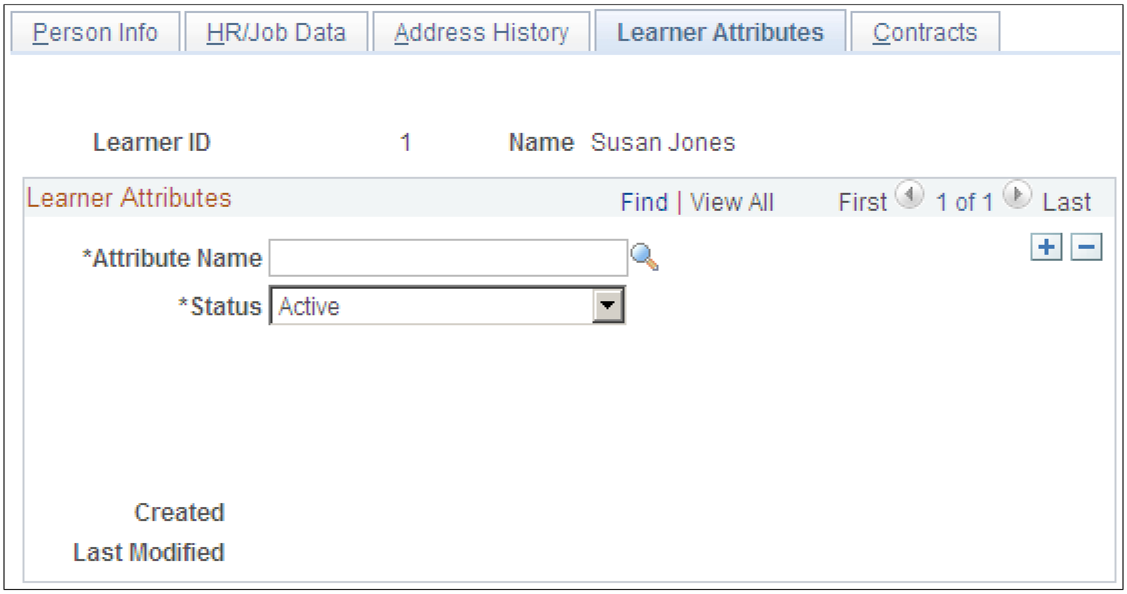
Internal Learners - Learner Attributes Page

Use the Internal Learners - Learner Attributes page (LM_LRNR_ATTRIBS) to define learning preferences for the learner, such as preferred language and content delivery method.

Navigation:

Enterprise Learning > **User Profiles** > **Internal Learners** > **Learner Attributes**

This example illustrates the fields and controls on the Learner Attributes page.



Learners can use the self-service pages to update their learning preferences.

Field or Control	*Description*
Attribute Name	PeopleSoft delivers these learner attributes and their corresponding attribute values: *Language Code, Preferred Delivery Method, PeopleSoft Calendar Filter, Program Type, Program Display Option, Rows Displayed, Search Attribute,* and *Training Region.* Learner attribute names are defined on the Learner Attributes page. See Learner Attributes Page. See Using the Learning Catalog.
Status	Select the status of the learner attribute for this learner. Your choices are *Active* and *Inactive.*

Field or Control	***Description***
Attribute Value	Values vary by attribute: • For the language attribute, select the language in which the learner prefers to receive learning. • For preferred delivery method, select a delivery method defined on the Delivery Method Type component. • For the program display option, select *Collapse* to hide section requirements or *Expand* to show section requirements on the Program Details page. Learners can access the Program Details page from the learning catalog. • For rows displayed, enter the maximum number of rows of search results to display to the learner when searching the catalog. • For the search attribute, specify whether the default search mode for the learner is basic or advanced. The advanced search mode displays additional search fields.

Internal Learners - Contracts Page

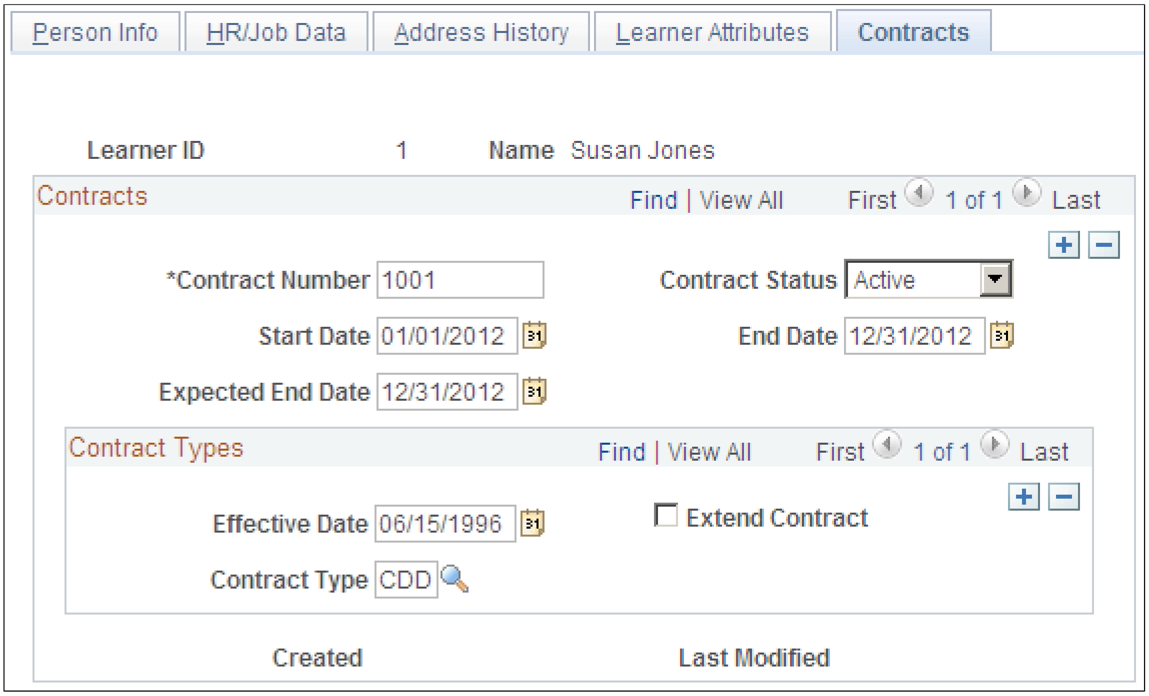
Use the Internal Learners - Contracts page (LM_LRN_CONTRACT) to review and update internal learner contract information.

Navigation:

Enterprise Learning > **User Profiles** > **Internal Learners** > **Contracts**

Note: This page appears in the Internal Learners component only if French features are enabled for the learning environment associated with the learner.

This example illustrates the fields and controls on the Internal Learners - Contracts page.



Note: You can edit the fields on this page only if the Contract Integration with HCM check box is not selected for the learner's learning environment.

See Learning Environment - Defaults Page.

Contracts

Field or Control	***Description***
Contract Number	Enter the contract number.
Contract Status	Indicate whether the contract is *Active* or *Inactive.*
Start Date	Enter the date on which the contract begins.
End Date	Enter the date on which the contract actually ends.
Expected End Date	Enter the date on which you expect the contract to end. **Note:** This can be different from the value you enter in the End Date field.

Contract Types

It's possible for multiple contract types to be effective within the contract period. Use the fields in this group box to enter information for each effective contract type.

Field or Control	***Description***
Effective Date	Enter the date on which the contract type became effective.
Extend Contract	Select to indicate that the learner's original contract has been extended beyond its original date or purpose.
Contract Type	Select the contract type associated with the contract. You define contract types on the Contract Types page.

Reviewing and Defining External Learner Data

To define profiles for external learners, use the External Learners (LM_PERSON_EXT) component.

Pages Used to Review and Define External Learner Data

Page Name	***Definition Name***	***Usage***
Profile Info Page	LM_PERSON	Define primary information about the learner, such as language code, preferred communication method, and learning environment ID.
External Learners - Address History Page	LM_PERSON_ADDR	Define external learner address information.
Edit Address Page	EO_ADDR_USA_SEC	Edit the external learner's address information.
External Learners - Learner Attributes Page	LM_LRNR_ATTRIBS	Define learning preferences for external learners, such as preferred language and content delivery method.
External Learners - Contracts Page	LM_LRN_CONTRACT	Define external learner contract information.

Prerequisites for Reviewing and Defining External Learner Data

Before you define profiles for external learners:

- Define user IDs for external learners.
- Define learning environments.
- Define customer organizations.
- (Optional) Define purchase orders and training units.
- (Optional) Define learner attributes.
- (FRA) Define contract types.

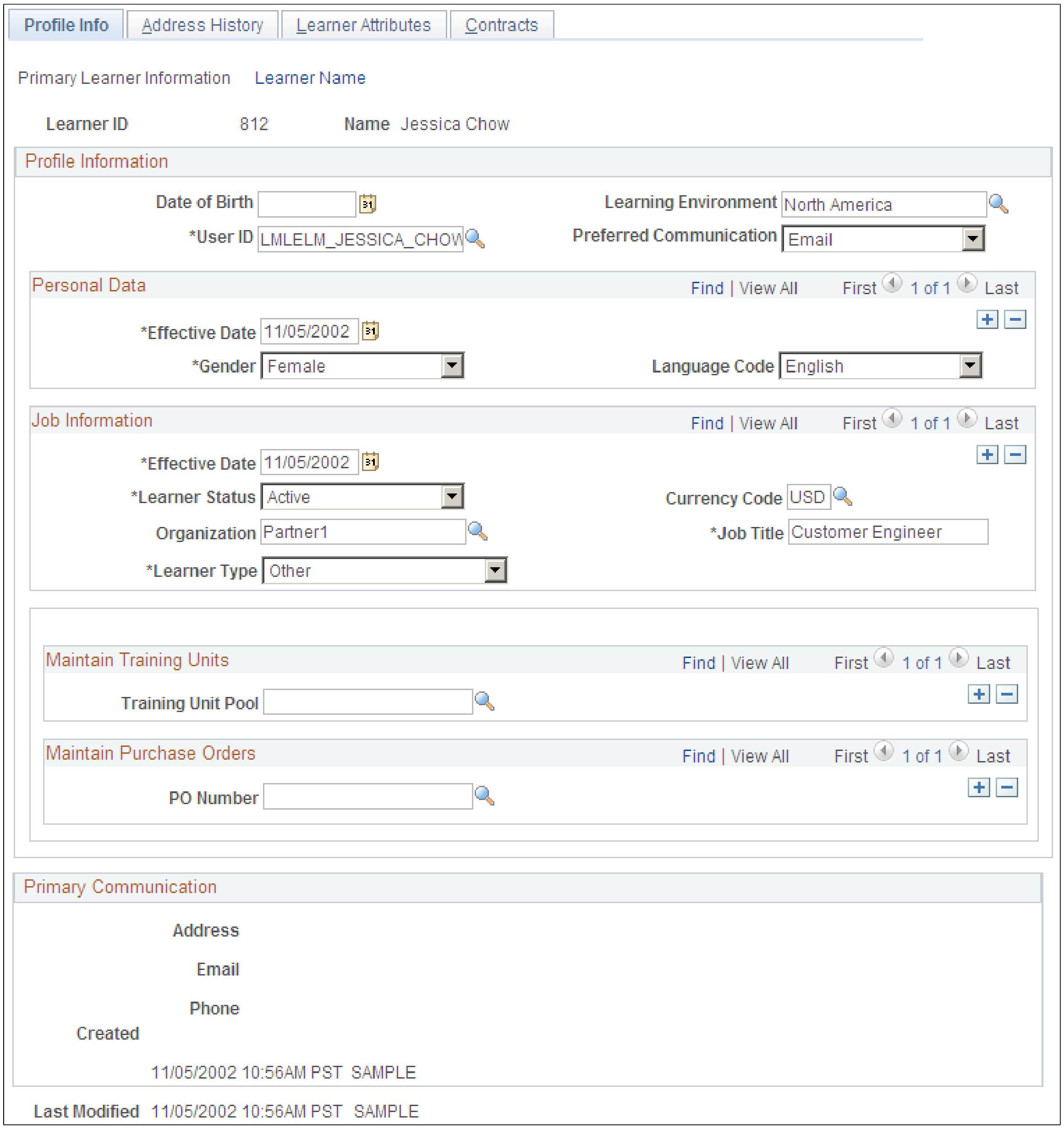
Profile Info Page

Use the Profile Info (profile information) page (LM_PERSON) to define primary information about the learner, such as language code, preferred communication method, and learning environment ID.

Navigation:

Enterprise Learning > **User Profiles** > **External Learners** > **Profile Info**

This example illustrates the fields and controls on the Profile Info: Primary Learner Information page.



Primary Learner Information: Profile Information

Field or Control	***Description***
User ID	Enter a user ID number for the learner. Create user ID numbers through PeopleSoft Security. See Understanding Roles and Permission Lists.

Field or Control	Description
Learning Environment	Assign the external learner to a learning environment. The system populates this field by default to the administrator's learning environment. You can change this value.
Preferred Communication	Select the method of communication that the learner prefers.

Primary Learner Information: Personal Data

Field or Control	Description
Effective Date	Enter the effective date for the external learner's gender and language code data.
Language Code	Select the external learner's primary language. PeopleSoft delivers language code values, and you can modify these values.

Primary Learner Information: Job Information

Field or Control	Description
Effective Date	Enter the effective date for the job.
Learner Status	Enter the learner's status for the job. A learner can have more than one active job on a record.

Field or Control	*Description*
Organization	Enter the organization with which this learner is associated. Organization values are defined in the Customer component. See Defining Customers. **Note:** When a learner self-enrolls in a class that has charges, and uses the chargeback method, the system looks for the business unit that you associated with the selected customer organization on the Payment Information page, to locate the corresponding mapped general ledger business unit. The system populates the self-service ChartField value fields, which define the department and account information to which you want to charge the class cost, by default to the values that are defined for the mapped general ledger business unit. If you define the ChartFields to appear during enrollment by selecting the **Display chartfields to Self-Service Users** on the Payment Information page, the default values appear to the learner or administrator and are available for edit.
Job Title	Enter the external learner's job title.
Currency Code	Enter the currency code that is associated with this job, for this learner. This field is for informational purposes only.
Learner Type	Select the learner type for the external learner. Values are: *Job Seeker, Other, Paid by Individual, Salary Paid by Employer,* and *Salary for Prof Contract* (salary for professional contract).

Primary Learner Information: Payment Method

Field or Control	*Description*
Training Unit Pool	Select one or more training unit pools that the learner can use to pay for classes and programs that carry a charge. You can select any training unit pools that are set up for the learner's organization.
PO Number	Select one or more purchase orders that the learner can use to pay for classes and programs that carry a charge. You can select any purchase orders that are set up for the learner's organization.

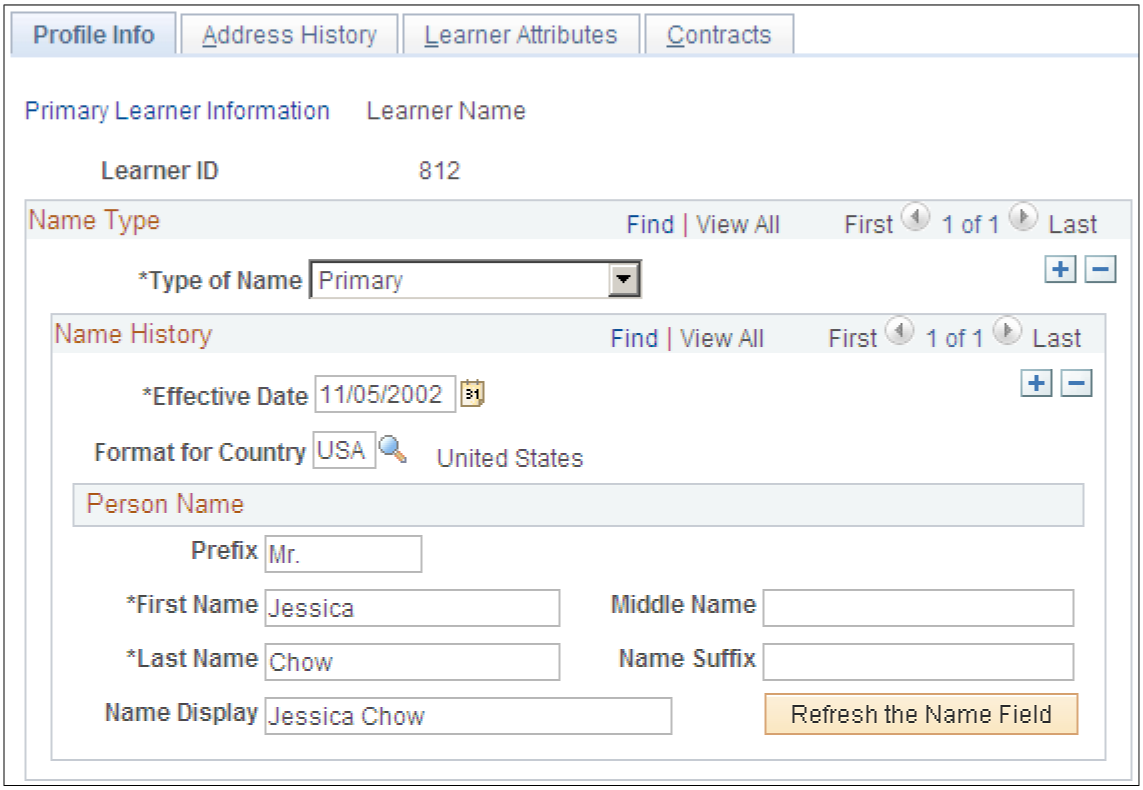
Primary Learner Information: Primary Communication

The system displays the external learner's primary communication information, as defined on the Address History page.

Learner Name

Access the Profile Info page. Click the **Learner Name** link.

This example illustrates the fields and controls on the Profile Info: Learner Name page.



Field or Control	***Description***
Type of Name	Select the name type. The delivered name type values are: *Preferred* and *Primary.* You can define additional name types on the Name Types page. See Name Types Page.
Effective Date	Enter the effective date for each name that is within a name type.
Format for Country	Enter the country format. This field has no code connected with it.

Learner Name: Person Name

The fields in the Person Name group box display the learner's name information. Click the **Refresh the Name Field** button to update the display of the external learner's name.

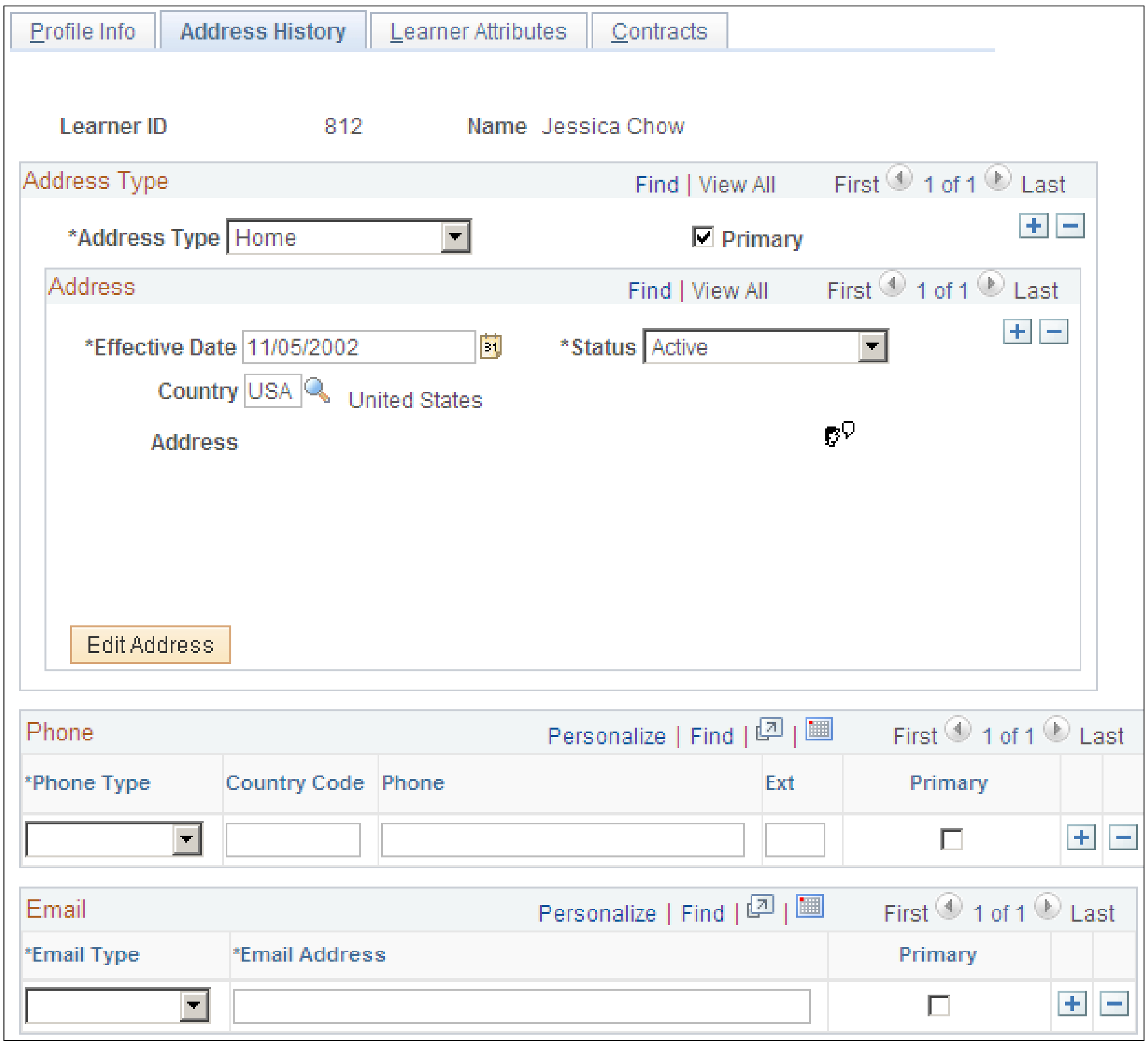
External Learners - Address History Page

Use the External Learners - Address History page (LM_PERSON_ADDR) to define external learner address information.

Navigation:

Enterprise Learning > **User Profiles** > **External Learners** > **Address History**

This example illustrates the fields and controls on the External Learners - Address History page.



Field or Control	***Description***
Address Type	Select an address type. Address type values are defined on the Contact Method Type page.

Field or Control	*Description*
Primary	Select to identify an address as primary. Every external learner must a primary address.
Effective Date and **Status**	Enter the effective date and status for the address type.
Country	Enter the country for the address. You must enter a country value before you can edit the address.
Address and **Edit Address**	Enter a country value if one is not specified, and click the **Edit Address** link to add or update the address information on the Edit Address page.

Phone

Field or Control	*Description*
Phone Type	Select a phone type. Phone type values are defined on the Contact Method Type page.
Country Code	Enter the country for the phone type.
Phone	Enter the phone number.
Ext (extension)	Enter the phone number extension, if any.
Primary	Select to identify a phone number as primary. If you have one or more phone numbers for an external learner, you must mark one as primary.

Email

Field or Control	*Description*
Email Type	Select an email type. Email type values are defined on the Contact Method Type page.
Email Address	Enter the email address.

Field or Control	***Description***
Primary	Select to identify an email address as primary. If you have one or more email addresses for an external learner, you must mark one as primary.

External Learners - Learner Attributes Page

Use the External Learners -Learner Attributes page (LM_LRNR_ATTRIBS) to define learning preferences for external learners, such as preferred language and content delivery method.

Navigation:

Enterprise Learning > **User Profiles** > **External Learners** > **Learner Attributes**

This page is the same page that you use to define learning preferences for internal learners.

Related Links

Internal Learners - Learner Attributes Page

External Learners - Contracts Page

Use the External Learners - Contracts page (LM_LRN_CONTRACT) to define external learner contract information.

Navigation:

Enterprise Learning > **User Profiles** > **External Learners** > **Contracts**

This page is the same as the one you use to define contract information for internal learners with one exception. You can edit the fields on this page regardless of whether the Contract Integration with HCM check box is selected for the learner's learning environment.

Related Links

Internal Learners - Contracts Page

Updating Personal Profile Information

This topic lists pages that learners can use to view or update personal profile information.

Pages Used to Update Personal Profile Information

Page Name	***Definition Name***	***Usage***
Personal Information Home Page	LM_PERSONAL_INFO	Review and update personal profile information.
Name Change	LM_PERSONAL_NAME	Update name information.
Update Addresses	LM_PERSONAL_ADDR	Review address information.
<Address Type>- Update Address <Address Type>- Add New Address	LM_PRSNADDRSAVE_SS	Access and update address information.
Edit Address	EO_ADDR_USA_SEC	Enter address information.
Update Email Addresses	LM_PERSONAL_EMAIL	Update email address information.
Update Phone Numbers	LM_PERSONAL_PHONE	Update phone number information.
Learner Preferences Page	LM_CATLG_SRCH_DFLT	Select learning preferences for the Find Learning page and enter your instant messaging settings

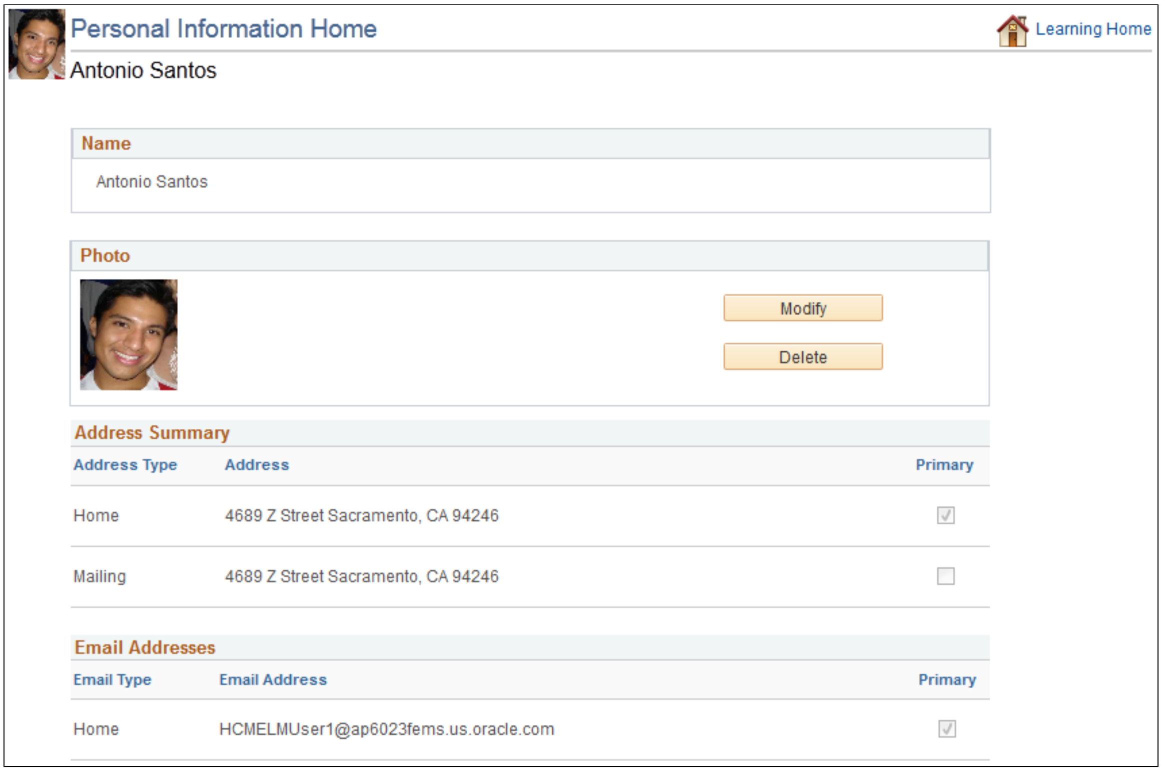
Personal Information Home Page

Use the Personal Information Home page (LM_PERSONAL_INFO) to review and update personal profile information.

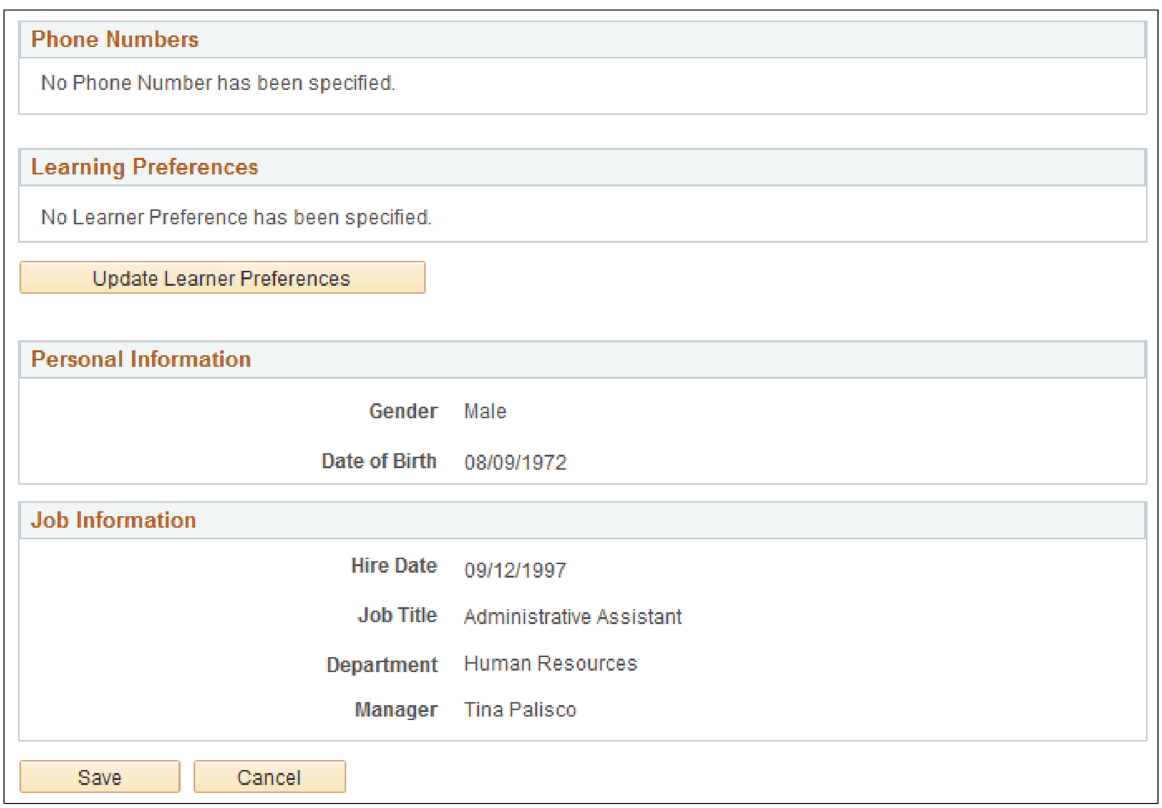
Navigation:

Self Service > Personal Information Home

This example illustrates the fields and controls on the Personal Information Home page.



This example illustrates the fields and controls on the Personal Information Home page.



External learners can update their personal profile information through self-service pages. Internal learners can view personal information that is imported from an HR system and can update their learner preferences.

Name

Field or Control	***Description***
Update Name	Click to access the Update Name page where you can update your name information. This button appears only for external learners.

Photo

This group box appears only if the **Display photo on self-service pages** check box is selected on the Install Defaults - General page. This is true for all learners.

For internal learners, the buttons in this group box appear only if the Sync Photo from HR check box is deselected on the Install Defaults - General page. The buttons always appear for external learners if the group box is visible.

Field or Control	***Description***
Add	Click to upload a photo that you want to appear on self-service pages.
Modify	Click to change the photo currently associated with your profile.
Delete	Click to delete the photo currently associated with your profile.

Address Summary

Field or Control	***Description***
Update Addresses	Click to access the Update Addresses page where you can update your address information. This button appears only for external learners.

Email Address

Field or Control	***Description***
Update Email Addresses	Click to access the Update Email Addresses page where you can update your email address information. This button appears only for external learners.

Phone Numbers

Field or Control	***Description***
Update Phone Numbers	Click to access the Update Phone Numbers page where you can update your phone number information. This button appears only for external learners.

Learning Preferences

Field or Control	***Description***
Update Learner Preferences	Click to access the Learner Preferences page where you can select your learning preferences for catalog search and enter your instant messaging and calendar settings.

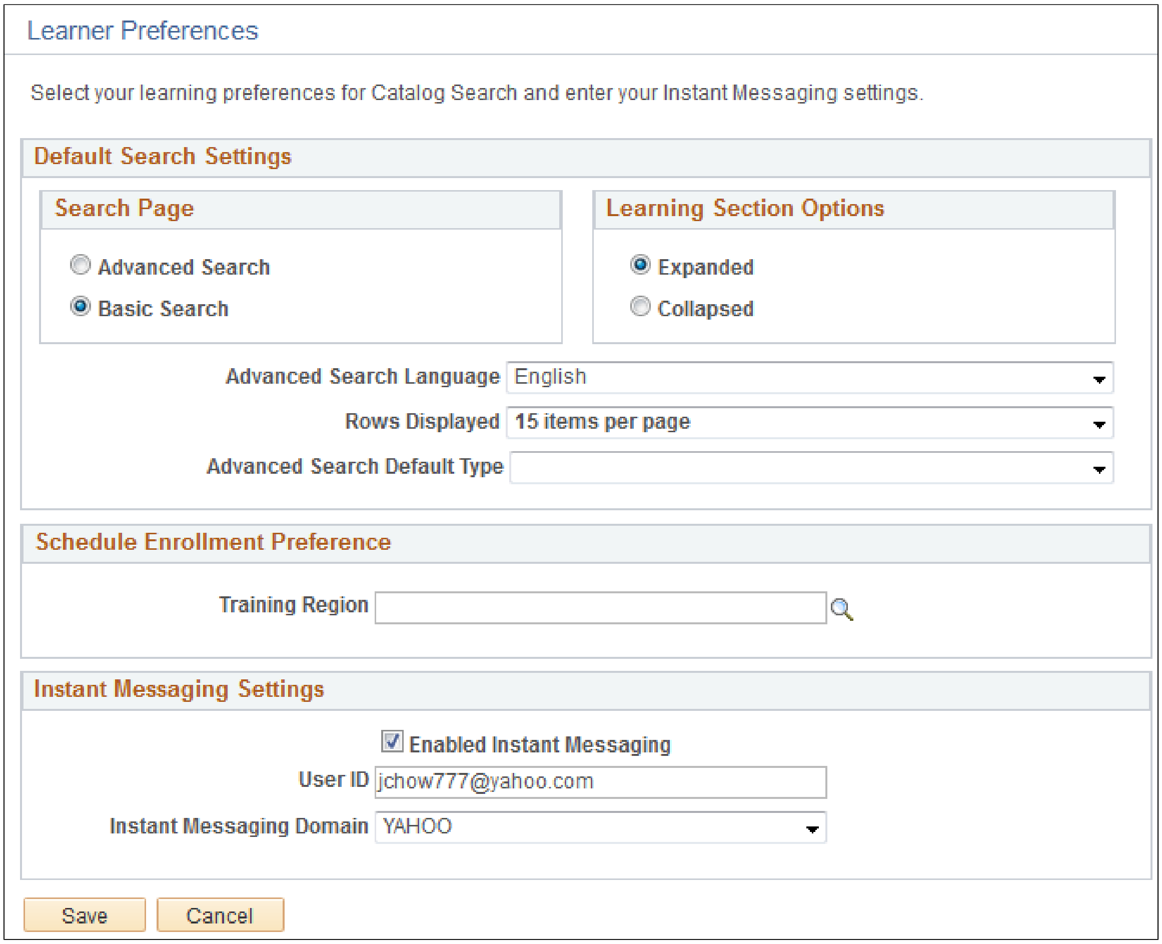
Learner Preferences Page

Use the Learner Preferences page (LM_CATLG_SRCH_DFLT) to select your learning preferences for the Find Learning page and enter your instant messaging settings.

Navigation:

Click the **Update Learner Preferences** button on the Personal Information Home page.

This example illustrates the fields and controls on the Learner Preferences page.



Default Search Options

Field or Control	***Description***
Advanced Search	Select to make **Advanced Search**the default search mode when you access the Find Learning page.
Basic Search	Select to make **Basic Search** your default search mode when you access the Find Learning page.
Expanded	Select to make sections of the Find Learning page expanded by default..
Collapsed	Select to make sections of the Find Learning page collapsed by default.

Field or Control	***Description***
Advanced Search Language	Select the default value of the Language field for advanced searches on the Find Learning page. This field has no effect on basic searches. **Note:** The system also uses this field during the automatic enrollment of planned and waitlisted learning. For automatic enrollment to occur, the language associated with the class must match the preferred language for the learner. The system first checks the value of the Advanced Search Language field to determine a learner's preferred language. If this field is blank, the system uses the base language for the system as the learner's preferred language. For more information on automatic enrollment, see the documentation for the Training Region Page.
Rows Displayed	Select the number of rows that the system displays per page on the Find Learning page.
Advanced Search Default Type	Select the default value of the Learning Type field for advanced searches on the Find Learning page. This field has no effect on basic searches.

Schedule Enrollment Preference

Field or Control	***Description***
Training Region	Enter the preferred training region. The system uses this value to identify classes for the automatic enrollment of planned and waitlisted learning. For more information on automatic enrollment, see the documentation for the Training Region Page.

Instant Messaging Settings

Field or Control	***Description***
Enabled Instant Message	Select to enable instant messaging for your user ID.
User ID	Enter your instant messaging user ID.
Instant Messaging Domain	Enter the domain you want to use for instant messaging.

Related Links

Find Learning Page

Enabling Instant Messaging

Defining Instructors

To define instructor profiles use the Instructors (LM_INSTR) component.

Instructors are internal or external learners in the system that you can assign to classes, class sessions, session patterns, and session templates. You also assign an instructor as a coordinator for the program. In addition to an instructor's profile information, which you define through the Internal Learner or External Learner component, you must define the learner as an instructor on the Instructor page. Some of the information that you define for an instructor includes teaching location preferences, areas of expertise, primary language, cost, and learning environment. In addition to entering instructor information on the Instructor page, instructors can access and update a limited amount of their information through the Instructor Preferences self-service component.

Page Used to Define Instructors

Page Name	***Definition Name***	***Usage***
Instructor Page	LM_INSTR	Define an internal or external learner as an instructor. Specify instructor preferences, qualifications, cost, and other important data.

Related Links

Updating Instructor Preferences

Prerequisite for Defining Instructors

Before you can set up instructor data, you must first define the instructor as a learner in your system. You can do this through the Internal Learner or the External Learner components.

Related Links

Reviewing and Updating Internal Learner Data

Reviewing and Defining External Learner Data

Instructor Page

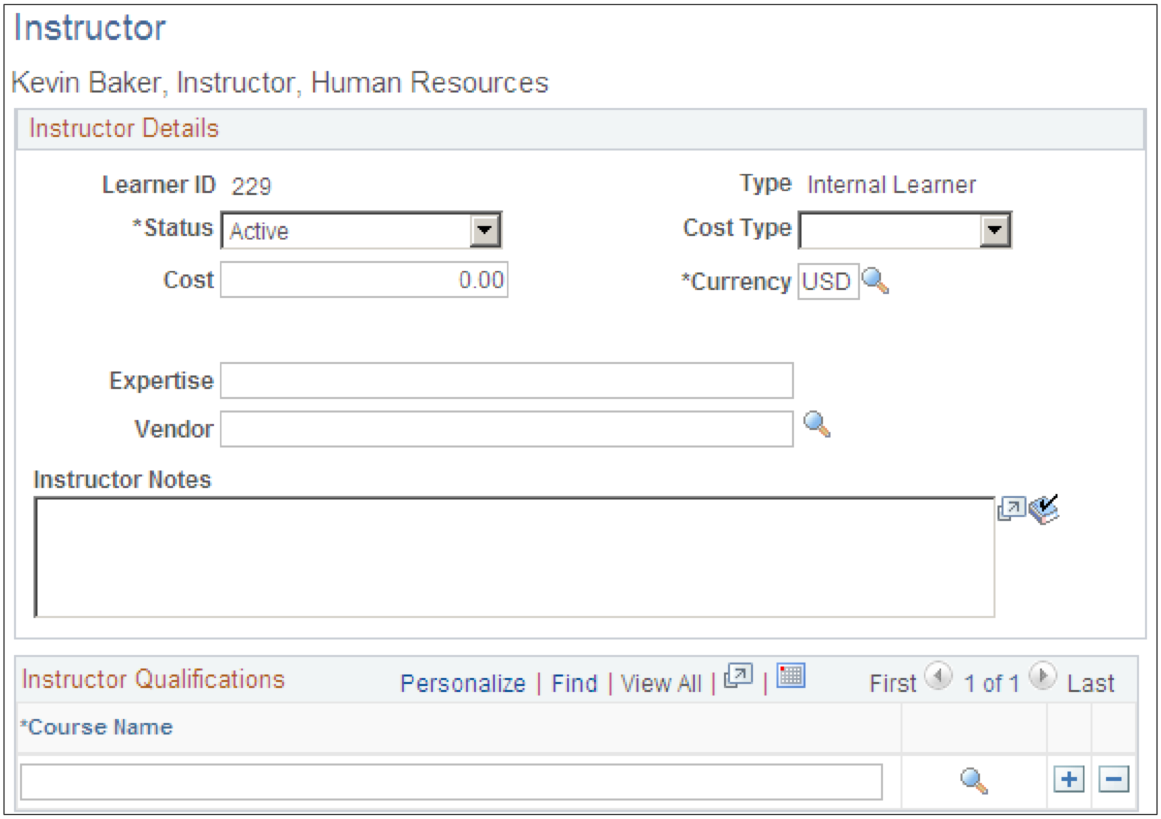
Use the Instructor page (LM_INSTR) to define an internal or external learner as an instructor.

Specify instructor preferences, qualifications, cost, and other important data.

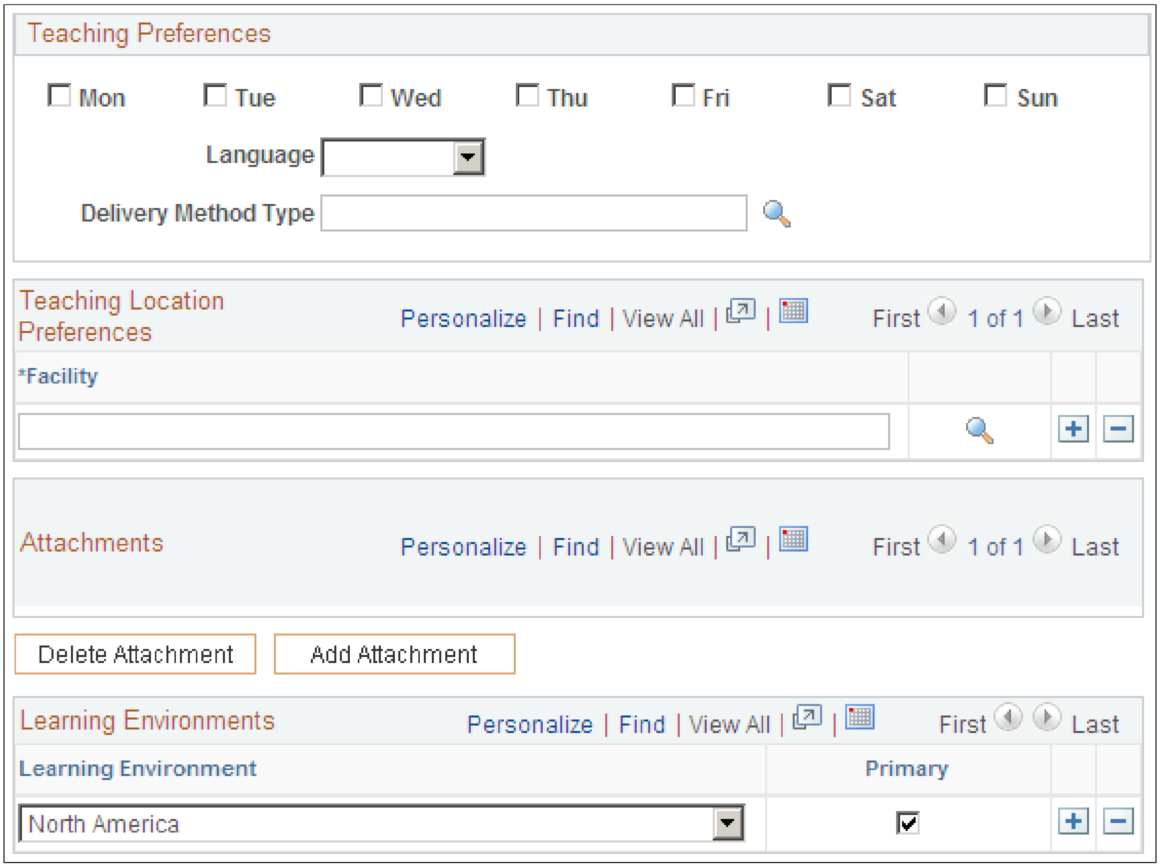
Navigation:

Enterprise Learning > **User Profiles** > **Instructors** > **Instructor**

This example illustrates the fields and controls on the Instructor page (1 of 2).



This example illustrates the fields and controls on the Instructor page (2 of 2).



Field or Control	***Description***
Status	Enter the status of this instructor record.
Cost	Enter the cost of the instructor, for financial and budget calculations. This is a base cost.
Currency	Enter the currency code with which the cost is associated. Currency code values are delivered with the system as translate values, and you can modify them.

Field or Control	Description
Cost Type	Once you attach items to a session, click the **Calculate Costs** button on the Class Costs page for the system to calculate the cost of the session. The process finds all of the instructors that are attached to all of the sessions of a class. For each session, it creates a line in the Class Cost table. Enter a cost type value. Options are: *Day:* The process counts each session as a day (no partial days) and multiplies the number of days by the cost. *Fixed:* The process uses a fixed cost that you specify. *Hour:* The process uses the session start and end times to determine how many hours the instructor teaches over the course of the class and multiplies the amount by the per hour cost. *Student:* The process multiplies the cost per student with the quantity that you enter on the Class Costs page. *Week:* The process assumes a five-day week, and it counts all of the days that the instructor is teaching with each session being a day, divides the result by five, and rounds up. The resulting number of weeks is multiplied by the cost.
Full-Time Instructor	Select if this is a full-time instructor. **Note:** (FRA) When this check box is selected and you export cost data for classes that are taught by this instructor to the Administer Training business process in PeopleSoft HR, the system also transmits the instructor's full time status. The Administer Training business process determines how to address the instructor salaries in the 2483 report when the indicator is present.
Expertise	Enter the primary field of knowledge for the instructor. This is a free-form field and is informational only.
Vendor	Enter the vendor with which this instructor is associated.
Instructor Notes	Enter any notes or comments that you have about the instructor. These are not visible to the instructor on the self-service Instructor Preferences page.

Instructor Qualifications

Field or Control	*Description*
Course	Select the courses for which this instructor is qualified to teach. The system searches on these values when you select the Qualified Instructors check box on the Instructor Search page.

Teaching Preferences

Field or Control	*Description*
Mon, Tue, Wed, Thu, Fri, Sat, and **Sun**	Select the days of the week on which the instructor prefers to teach. This is for informational purposes only.
Language	Select the languages in which this instructor prefers to teach. This value can differ from the language code value for the individual on the Profile Info - Primary Learner Information page. Language values are delivered with the system as translate values.
Delivery Method Type	Enter the preferred teaching delivery methods for this instructor. Delivery method type values are defined on the Delivery Method Type page.

Teaching Location Preferences

Select all of the instructor's teaching location preferences. This is for informational purposes only.

Attachments

Use the Attachments section to attach any type of file that is associated with this instructor—for example, the instructor's curriculum vitae, evaluation ratings, or any other information that you want to store for this instructor. The instructor can view the attachments through the self-service Instructor Preferences page.

Field or Control	*Description*
Attached File	The name of the file attachment.
Description	A description of the attachment.

Field or Control	*Description*
Delete Attachment	Select the check box for the attachment that you want to delete, and click the **Delete Attachment** button to delete an attachment.
Add Attachment	Click to add an attachment.

Learning Environments

Field or Control	*Description*
Learning Environment	Select the learning environment with which you want to associate this instructor. This controls the way in which this instructor appears in search records. For example, when an administrator is searching for an instructor record, either to update the instructor's profile record or to assign the instructor to a class session, only those instructors in the same learning environment as the administrator appear. See Defining Learning Environments.
Primary	Select to identify a learning environment setting as primary. Learning environment values are defined on the Learning Environment - Basic Data page. This value is for information only, and there is no code tied to it.

Updating Instructor Preferences

Page Used to Update Instructor Preferences

Page Name	*Definition Name*	*Usage*
Instructor Preferences Page	LM_SS_INSTR	Update instructor’s personal teaching preference information.

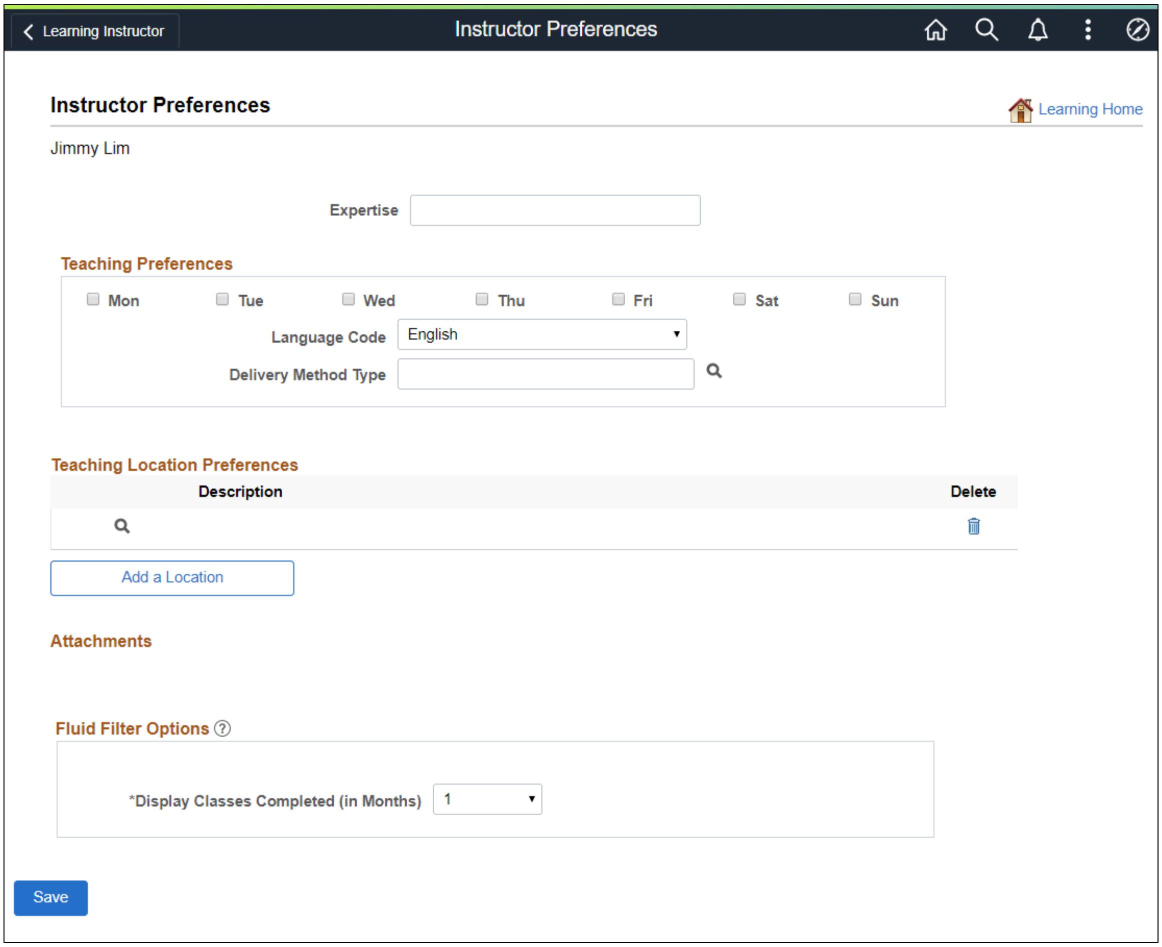
Instructor Preferences Page

Instructors use the Instructor Preferences page (LM_SS_INSTR) to update their personal teaching preference information.

Navigation:

Self Service > **Instructor Preference** > **Instructor Preference**

This example illustrates the fields and controls on the Instructor Preferences page.



Field or Control	***Description***
Fluid Filter Options: *Display Classes Completed (in Months)	The Fluid Filters Options section is displayed only if the fluid feature is installed. Use this option to restrict the courses to display in the **Completed** filter. By default, 1 is selected, which means the system will fetch only those classes from one month ago to display under the **Completed** filter on the My Classes Page (for smartphones) and My Classes Page (for desktop/tablet devices).

Instructors use this page to update their teaching preferences. Updates to this page simultaneously update the corresponding values on the Instructor page. Not all values are available for the instructor to update. For example, **Learning Environment** is a value on the Instructor page, but it is not a value on the Instructor Preferences page.

Merging Learners

Pages Used to Merge Learners

Page Name	***Definition Name***	***Usage***
Merge Configuration - Merge Status Options Page	LM_MERGE_ENR_STTS	Specify the class, course, program, and supplemental learning statuses that are included in the Learner Merge process.
Merge Configuration - Duplicate Detection Settings Page	LM_MERGE_DUP_PG	Select the parameters used to identify and populate potential duplicate learners.
Merge Learners - Learner Search Page	LM_LRN_SRCH_MERGE	Search for a target learner
Merge Learners - Select Learners Page	LM_LRN_INFO_PG	Select source learners and merge them with your target learner.
Verify Learning Page	LM_VRFY_LRNG_SEC	View the source learner's learning and verify which of it you want merged with the target learner's learning.

Understanding Merging Learners

A situation can sometimes occur within organizations in which there are both external and internal learner profiles for the same person. For example, a contractor who was originally added to your ELM system as an external learner could be hired permanently leading to the creation of an internal learner profile. This results in duplicate active learner records and distributed learning history for the same person. In this type of situation, merging the duplicate learners manually is tedious and time consuming. The Merge Learners component enables you to merge the learning of external source learners to a target internal learner, creating a single, unified learning record for the learner in your ELM system.

Learner Merge Security

To access the Learner Merge menu and the pages associated with it, a user must have the LMLELM_Enrollment_Admin (Enrollment Administrator) role with the LMLELM9110 (Administer Learner Merge) permission list.

Important! The LMLELM9110 permission list is not delivered as part of the LMLELM_Enrollment_Admin role. You must add the permission list to the role.

For more information on roles and permission lists, see the product documentation for *PeopleTools: Security Administration*.

Related Links

Understanding Person and Organization Data

Reviewing and Updating Internal Learner Data

Reviewing and Defining External Learner Data

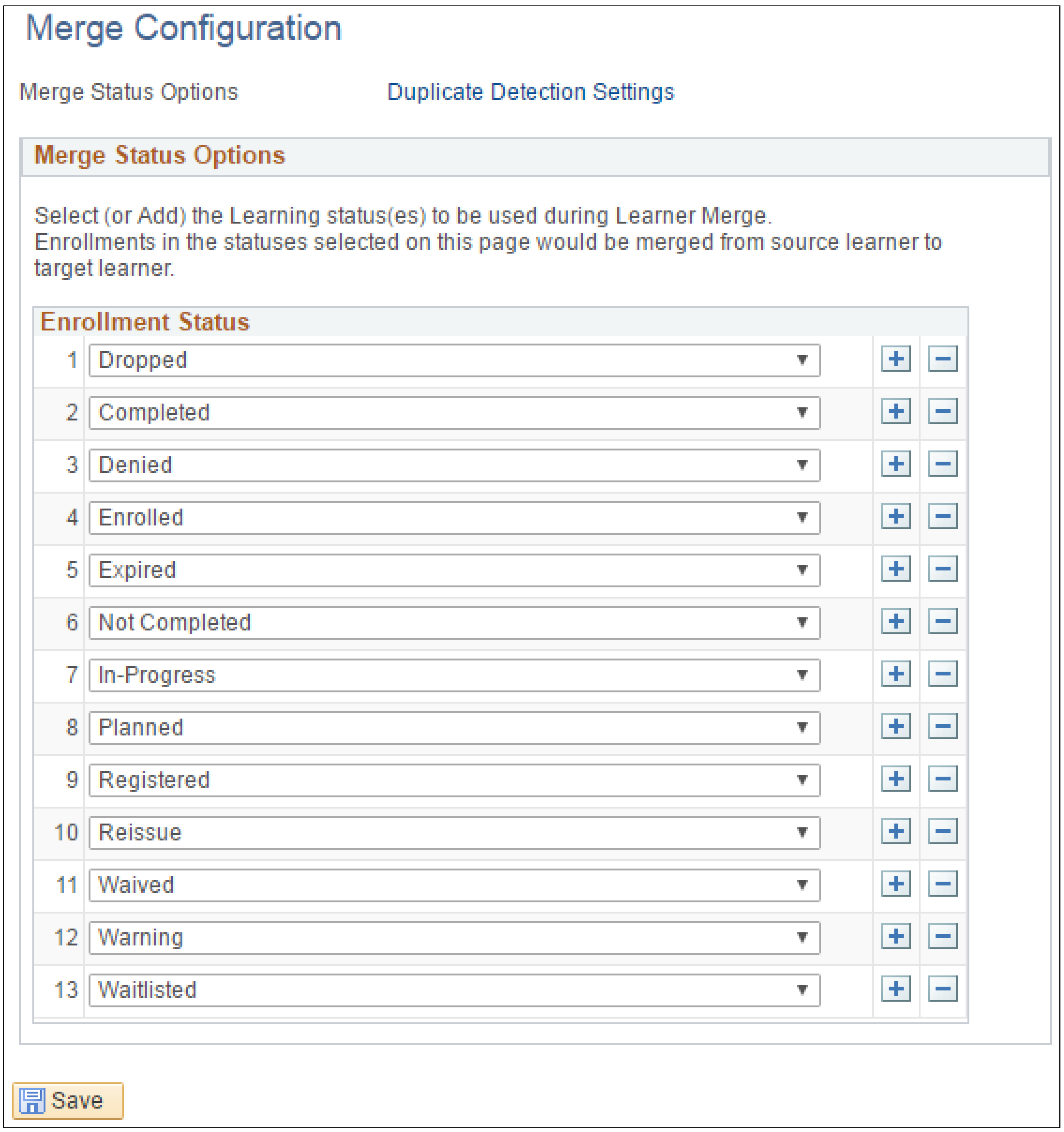
Merge Configuration - Merge Status Options Page

Use the Merge Configuration - Merge Status Options page (LM_MERGE_ENR_STTS) to specify the class, course, program, and supplemental learning statuses that are included in the Learner Merge process.

Navigation:

Enterprise Learning > **Learner Merge** > **Merge Configuration**

This example illustrates the fields and controls on the Merge Configuration - Merge Status Options page.



Use this page to determine which learning statuses are included in the Learner Merge process. When you click the Merge Learners button on the Merge Learners - Select Learners Page, the process merges only the learning with statuses listed on this page.

Note: This page is applicable to classes, courses, programs, and supplemental learning only. The system does not use the statuses defined on this page to determine which learning requests, learning plans, and objectives are included in the Learner Merge process.

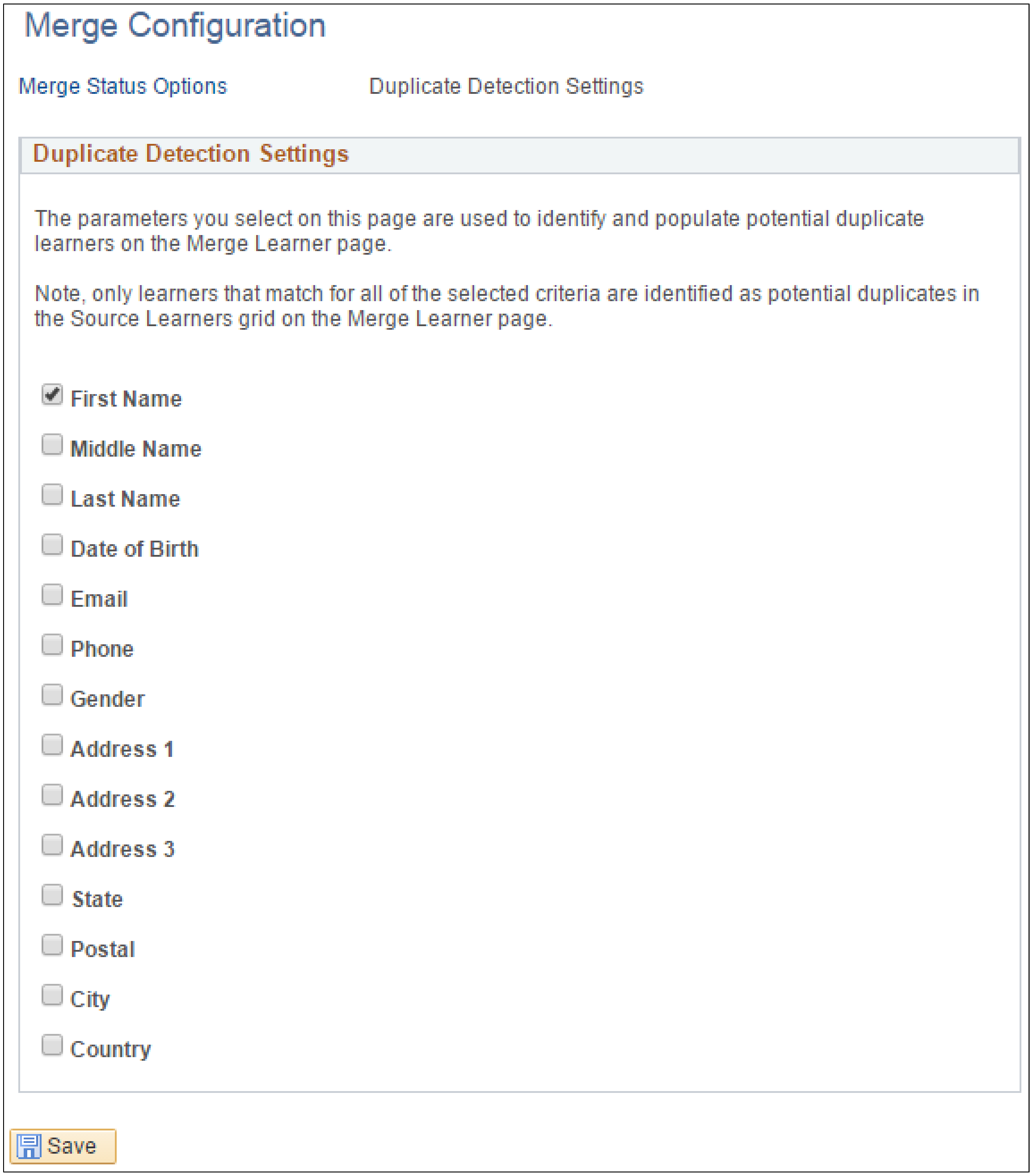
Merge Configuration - Duplicate Detection Settings Page

Use the Merge Configuration - Duplicate Detection Settings page (LM_MERGE_DUP_PG) to select the parameters used to identify and populate potential duplicate learners.

Navigation:

Enterprise Learning > **Learner Merge** > **Merge Configuration** > **Duplicate Detection Settings**

This example illustrates the fields and controls on the Merge Configuration - Duplicate Detection Settings page.



Use this page to select the parameters that the system uses to identify and populate potential duplicate learners when you access the Merge Learner page. When the system looks for potential duplicates, it identifies only learners that match for all of the selected criteria. For example, if you select **First Name** and **Last Name** on this page, the system identifies source learners as potential duplicates only if they share both a first name and last name with the target learner. Learners with only a matching first name or a matching last name would not be identified as potential duplicates.

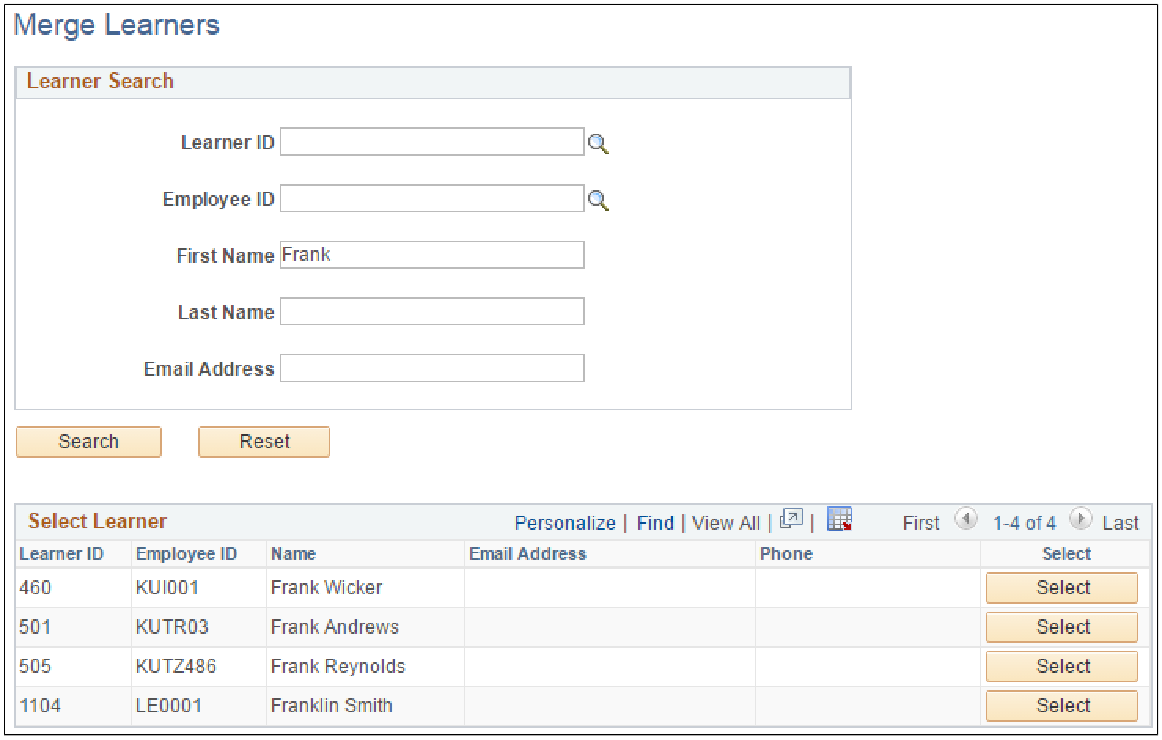
Merge Learners - Learner Search Page

Use the Merge Learners - Learner Search page (LM_LRN_SRCH_MERGE) to search for a target learner.

Navigation:

Enterprise Learning > **Learner Merge** > **Merge Learners**

This example illustrates the fields and controls on the Merge Learners - Learner Search page.



Learner Search

Use this group box to search for a target learner. The target learner is the active internal learner to which you want to merge external learner information. You can search by:

- **Learner ID**
- **Employee ID**
- **First Name**
- **Last Name**
- **Email Address**

Field or Control	***Description***
Search	Click to search for target learners using the entered criteria. The search results are displayed in the **Select Learner** group box.
Reset	Click to clear all the fields in the **Learner Search** group box.

Select Learner

This group box displays the active internal learners that meet the search criteria that you entered in the Learner Search group box. Click the **Select** button next to the learner that you want to select as the target learner for the merge.

Merge Learners - Select Learners Page

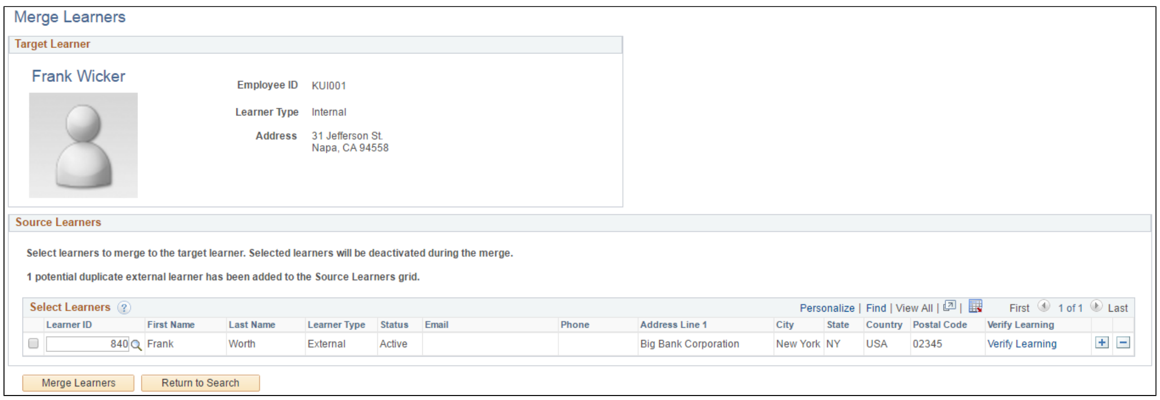
Use the Merge Learners - Select Learners page (LM_LRN_INFO_PG) to select source learners and merge them with your target learner.

Navigation:

Enterprise Learning > **Learner Merge** > **Merge Learners**

Click the Select button for a target learner on the Merge Learners - Learner Search page.

This example illustrates the fields and controls on the Merge Learners - Select Learner page.



Target Learner

This group box displays the employee ID, learner type, phone number, email address, and mailing address of the selected target internal learner.

Source Learners

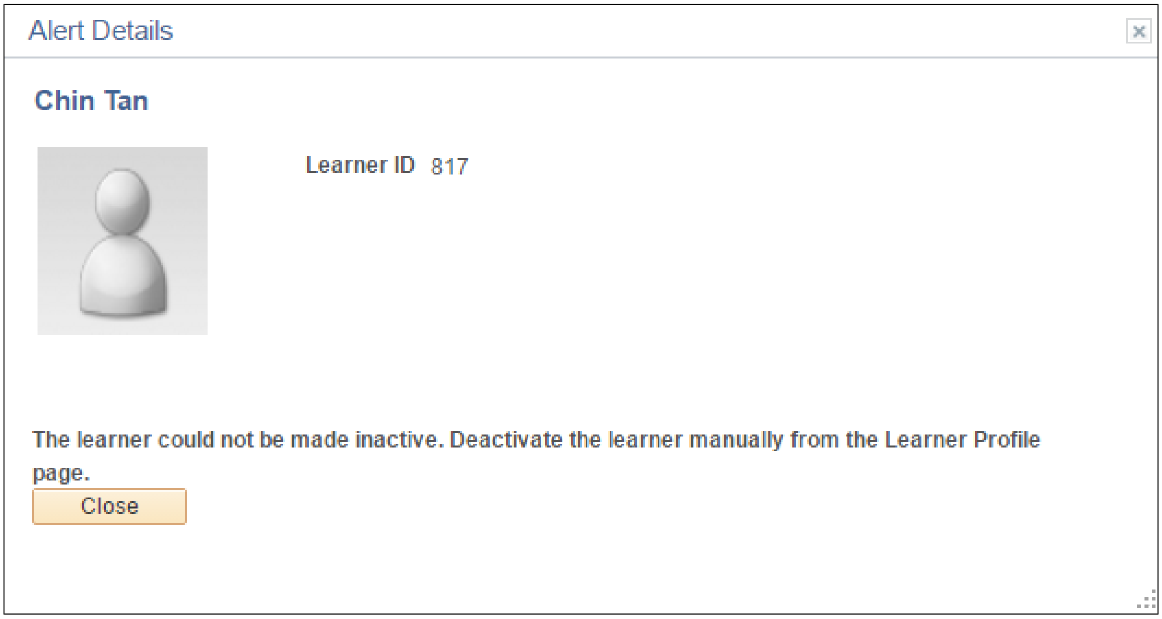
By default, this grid includes any potential duplicate external learners that match the criteria you select on the Merge Configuration - Duplicate Detection Settings Page. Use this grid to add or remove source learners to merge with the target learner. You can add multiple source learners to the grid. Select the check box next to each source learner that you want to merge with the target learner.

Note: Unlike internal target learners, which must be active, external source learners can be active or inactive.

Field or Control	***Description***
Learner ID	Enter the ID of the external learner you want to merge with the target learner.

Field or Control	*Description*
Verify Learning	Click to access the Verify Learning Page where you can view the source learner's learning and verify which of it you want merged with the target learner's learning.
Merge Learners	Click this button to merge all the selected source learners with the target learner. The system merges the learning associated with the source learners with the learning of the target learner. This includes all courses, programs, and supplemental learning with a status defined on the Merge Configuration - Merge Status Options Page The system also merges learning requests, current and completed learning objectives, and any learning associated with current and completed learning plans. Finally, the system changes the status of the source learners from active to inactive. **Note:** In the case that source learners and target learners are enrolled or registered in the same course or program, the system ignores source learner enrollments and registrations with a status of *Planned* or *Waitlisted*. For enrollments and registrations with all other statuses, the learner merge process assigns the status of the enrollment or registration with the most recent enrollment or registration date. In the case that a source learner's enrollment or registration is *Completed* and the target learner's is *In Progress*, the system creates two rows for the merged learner, one for each status. **Important!** When you click the Merge Learners button, you receive a message informing you that the merge process is irreversible. Click **Yes** to confirm that you want to merge the selected learners.
Return to Search	Click to return to the Merge Learners - Learner Search page.
Merge Status	This field appears only after running the learner merge process. When learners are merged without any errors, this field displays a status of *Merged Successfully*. If the system encounters any issues with the merge, this field displays an **Alerts** link. **Note:** The Alerts link is not an indication that the learner merge process was interrupted. The learners were still merged, but for some reason one of the external learners couldn't be made inactive.
Alerts	Click to view the details of the alert.

This example illustrates the Alert Details page.

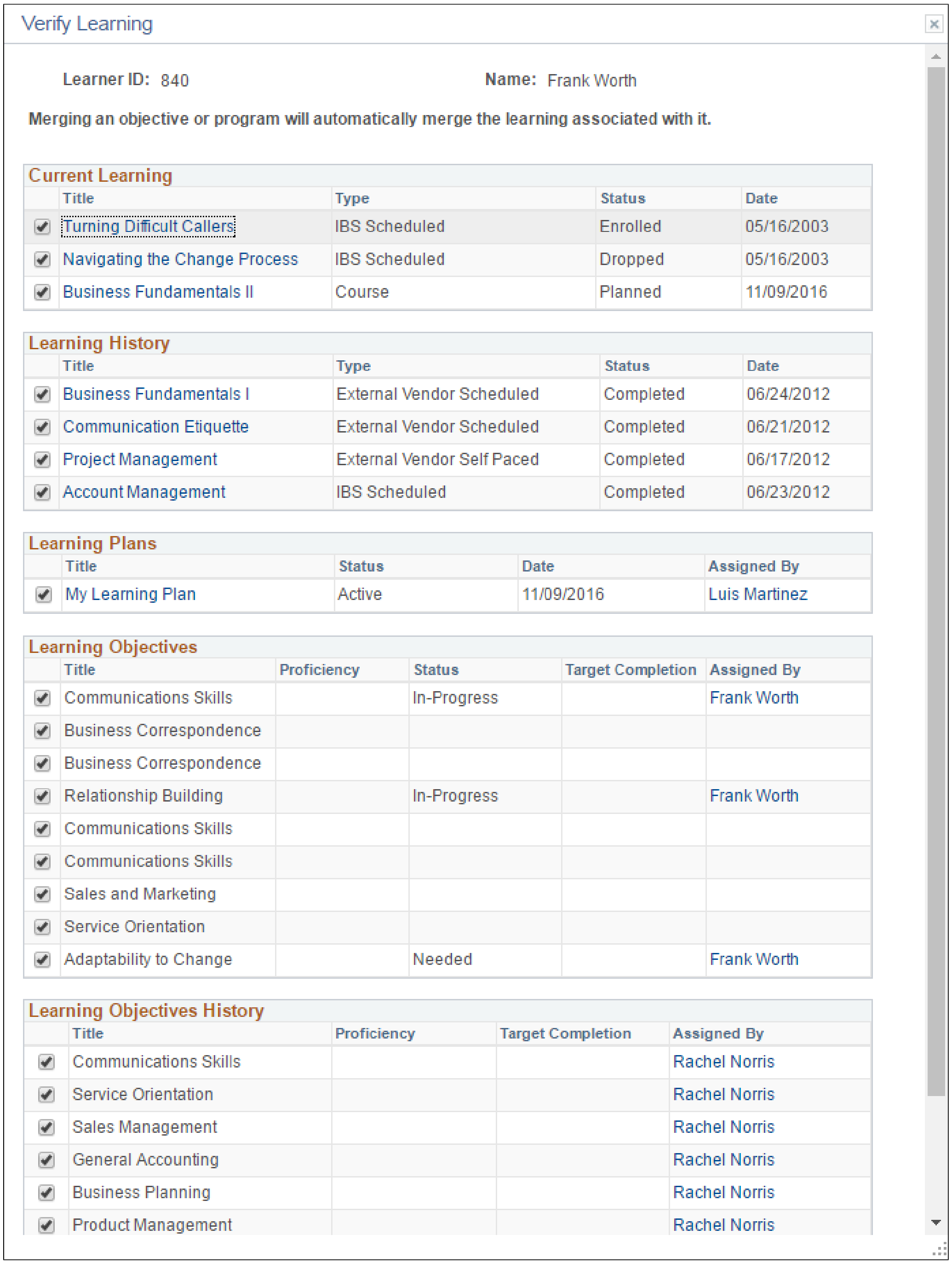


This page displays a description of the alert along with any additional instructions.

Verify Learning Page

Use the Verify Learning page (LM_VRFY_LRNG_SEC) to view the source learner's learning and verify which of it you want merged with the target learner's learning.

This example illustrates the fields and controls on the Verify Learning page.



Verify Learning

Learner ID: 840 Name: Frank Worth

Merging an objective or program will automatically merge the learning associated with it.

Current Learning

	Title	Type	Status	Date
☑	Turning Difficult Callers	IBS Scheduled	Enrolled	05/16/2003
☑	Navigating the Change Process	IBS Scheduled	Dropped	05/16/2003
☑	Business Fundamentals II	Course	Planned	11/09/2016

Learning History

	Title	Type	Status	Date
☑	Business Fundamentals I	External Vendor Scheduled	Completed	06/24/2012
☑	Communication Etiquette	External Vendor Scheduled	Completed	06/21/2012
☑	Project Management	External Vendor Self Paced	Completed	06/17/2012
☑	Account Management	IBS Scheduled	Completed	06/23/2012

Learning Plans

	Title	Status	Date	Assigned By
☑	My Learning Plan	Active	11/09/2016	Luis Martinez

Learning Objectives

	Title	Proficiency	Status	Target Completion	Assigned By
☑	Communications Skills		In-Progress		Frank Worth
☑	Business Correspondence				
☑	Business Correspondence				
☑	Relationship Building		In-Progress		Frank Worth
☑	Communications Skills				
☑	Communications Skills				
☑	Sales and Marketing				
☑	Service Orientation				
☑	Adaptability to Change		Needed		Frank Worth

Learning Objectives History

	Title	Proficiency	Target Completion	Assigned By
☑	Communications Skills			Rachel Norris
☑	Service Orientation			Rachel Norris
☑	Sales Management			Rachel Norris
☑	General Accounting			Rachel Norris
☑	Business Planning			Rachel Norris
☑	Product Management			Rachel Norris

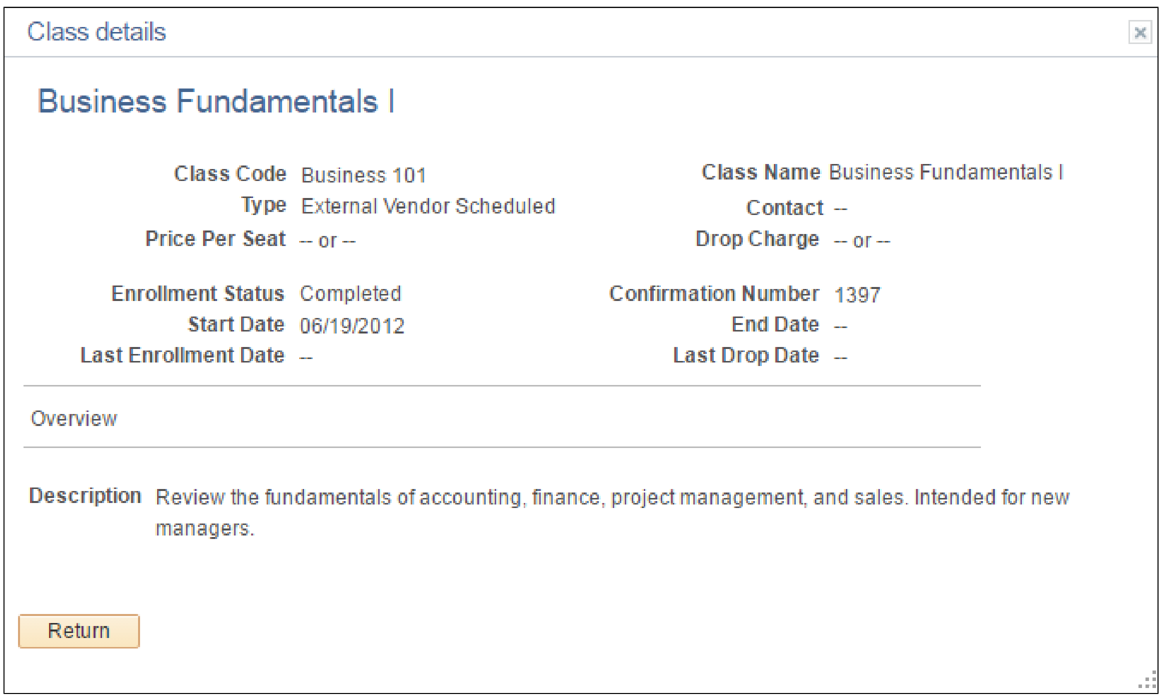
This page lists all the learning associated with the source learner that has a status defined on the Merge Configuration - Merge Status Options Page. By default all learning displayed on this page is selected to be merged with the target learner. Deselect the check box next to any learning you do not want merged with the target learner.

Field or Control	*Description*
OK	Click to accept any changes you made on this page and return to the Merge Learners - Select Learners Page.
Cancel	Click to cancel any changes you made on this page and return to the Merge Learners - Select Learners Page.

Current Learning and Learning History

These sections display all the courses, programs, and supplemental learning associated with the source learner that are not pending approval. This includes any learning requests. Click the link in the Title column to view detailed information about the learning.

This example illustrates the modal page that appears when you click a link in the Title column for current learning and learning history.

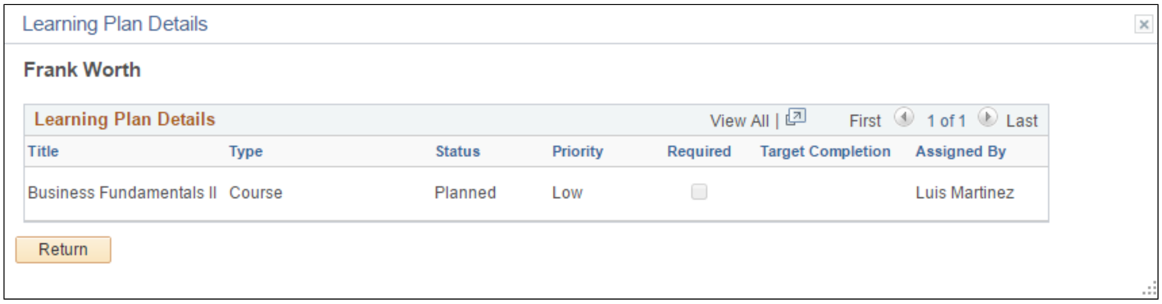


Note: The link in the Title column is not available for learning requests and supplemental learning.

Learning Plans

This section displays the learning plans associated with the source learner. Click the link in the Title column to view detailed information about the learning plan.

This example illustrates the modal page that appears when you click the link in the Title column for learning plans.



Learning Objectives and Learning Objectives History

These sections display all the learning objectives associated with the source learner. Click the link in the Assigned By column to view information about the person who assigned a particular learning objective.

This example illustrates the modal page that appears when you click the link in the Assigned By column for learning plans, learning objectives, and learning objectives history.

Deleting Learners

This topic describes how to delete learners.

Pages Used to Delete Learners

Page Name	***Definition Name***	***Usage***
Learner Delete Control Page	LM_LRNR_EXC_REC	Identify tables where learner data will not be deleted.

Page Name	***Definition Name***	***Usage***
Learner Delete Page	LM_LRNR_ID_DELETE	Select learner to be deleted and run the Learner Delete process.
Learner Delete Log Page	LM_LRNR_ID_DEL_LOG	Review the data that was deleted for a specific learner.

Understanding Learner Deletion

Use the Learner Delete (LM_LRNR_DEL) Application Engine process to delete data for specific learners. In case of merged learner IDs, the system will perform a check, to ensure that both the active and inactive learner IDs are deleted.

Oracle delivers the *Learner Delete Administrator* role specifically for users running the Learner Delete process. These users can access all pages related to the Learner Delete process. This role has to be assigned to the users manually.

Note: Once a learner ID is deleted, the user profile gets locked and no user will be permitted to log in to the system using the deleted user credentials.

After a learner ID is deleted, any active learning associated with the learner, such as a class, course, program or supplemental learning, gets dropped/deleted. The maximum enrollment limit and wait lists for all learnings previously associated with the deleted learner ID are refreshed.

Deleted Data

The Learner Delete process performs these actions:

- All tables with any of the fields listed below are deleted:
  - LM_ACT_OWNER_ID
  - LM_APPR_ID
  - LM_ASSIGNED_BY
  - LM_CNTCT_ID
  - LM_COORD_ID
  - LM_ENRLMT_ADMIN_ID
  - LM_EXT_APPR_ID
  - LM_INSTR_ID
  - LM_INT_APPR_ID
  - LM_LPLN_CREATED_BY
  - LM_MANAGER_ID

  - LM_OWNER_ID
  - LM_PRVD_ID
  - LM_REQUESTOR_ID
  - LM_SHPMNT_OWNR_ID
  - LM_SPL_APPROVER
  - LM_SRC_PERSON_ID
  - LM_SUPERVISOR_ID
  - LM_TARGT_PERSON_ID

- For all the tables that have any of the fields listed above as a foreign key, the process changes the corresponding value to *0* (zero).

  For example, in the Enrollment table the LM_PERSON_ID field is zeroed out.

- For the learner attachment tables, the process deletes the data related to the learner that you specify.

Excluding Records from the Deletion Process

The Learner Delete Control Page enables administrators to specify records to be excluded from the deletion process.

When a user runs the process, the Learner Delete Page includes a **Skip Record Exclusion Check** option. When this option is selected, the record exclusion settings are ignored and all learner data is deleted.

Limitations

The Learner Deletion process has the following limitations:

- File attachments that are stored outside of the PeopleSoft database (for example, on an FTP server) are not deleted.
- If you have customized the system, or if you have sent learner data to third-parties, you are responsible for managing the deletion of the relevant data.

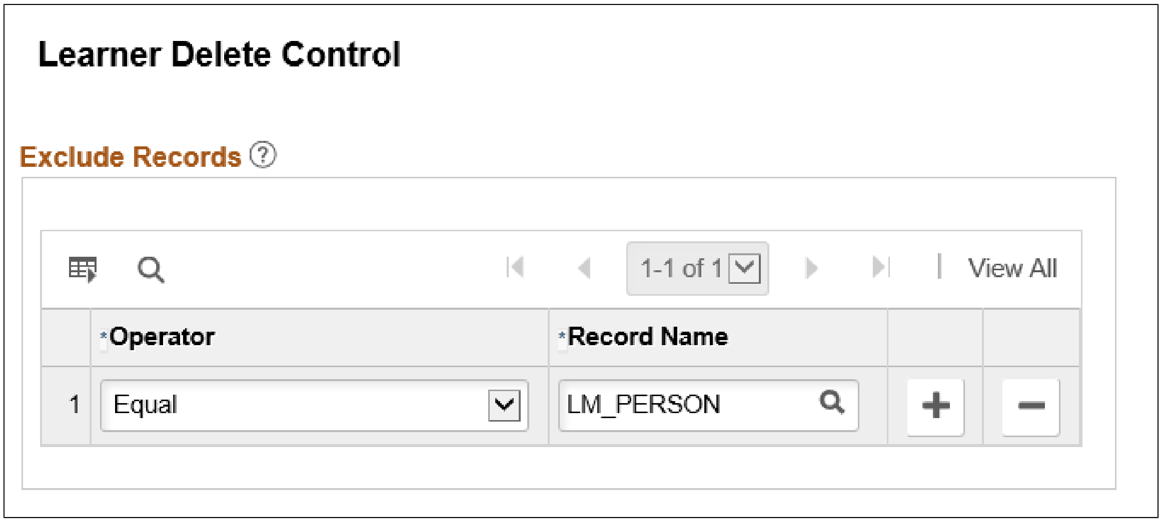
Learner Delete Control Page

Use the Learner Delete Control page (LM_LRNR_EXC_REC) to identify tables where learner data will not be deleted.

Navigation:

Set Up ELM > **System Administration** > **Database Processes** > **Learner Delete Control**

This example illustrates the fields and controls on the Learner Delete Control page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Operator	Select *Equal* to exclude the specific record that you specify. Select *Like* to exclude records with record names like the string that you specify.
Record Name	Enter the name of the record to be excluded from the deletion process.

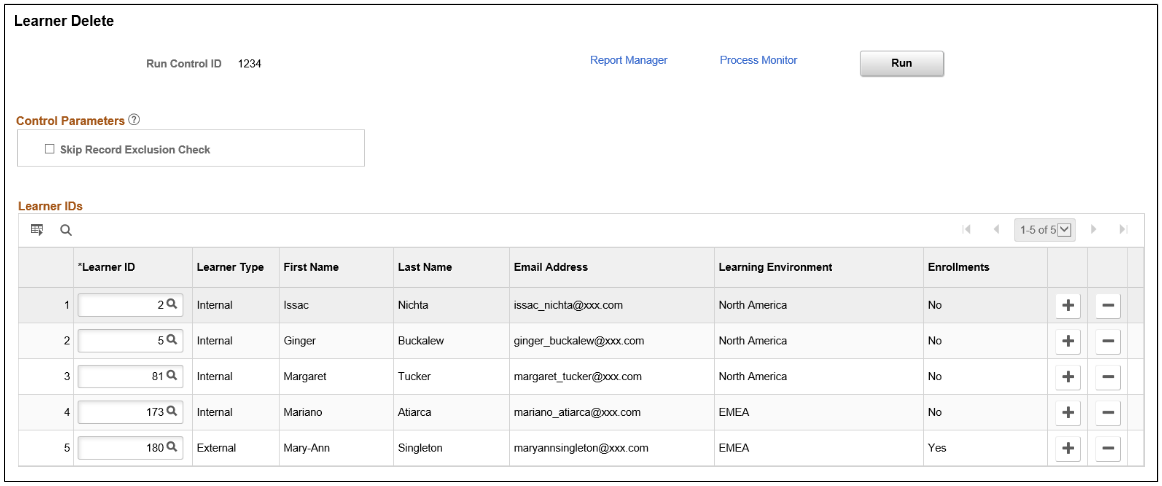
Learner Delete Page

Use the Learner Delete page (LM_LRNR_ID_DELETE) to select learner to be deleted and run the Learner Delete process.

Navigation:

Set Up ELM > **System Administration** > **Database Processes** > **Learner Delete**

This example illustrates the fields and controls on the Learner Delete page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Run	Click the Run button to access the Process Scheduler Request page, where you can run or schedule the Learner Delete process.

Control Parameters

Field or Control	***Description***
Skip Record Exclusion Check	Select this check box to ignore the **Exclude Records** settings on the Learner Delete Control Page. This check box is deselected by default. With this default setting, the deletion process does not affect tables that the process is configured to exclude. When you select this check box, all learner data is deleted, irrespective of the exclusion rules set.

Learner IDs

Field or Control	***Description***
<sequence number>	If you enter multiple learner IDs in the grid, the Learner Delete process runs through each learner in sequence. The sequence number matches the process sequence number that appears on the Learner Delete Log Page.

Field or Control	Description
Learner ID	Enter the learner ID for the learner to be deleted. The system populates the other columns in the grid with the learner type, name, email address, learning environment and whether or not the learner has any active enrollments. This read-only information helps you verify that you've entered the correct learner ID. After you run the deletion process, all learner data (including the learner ID) is cleared from the grid.

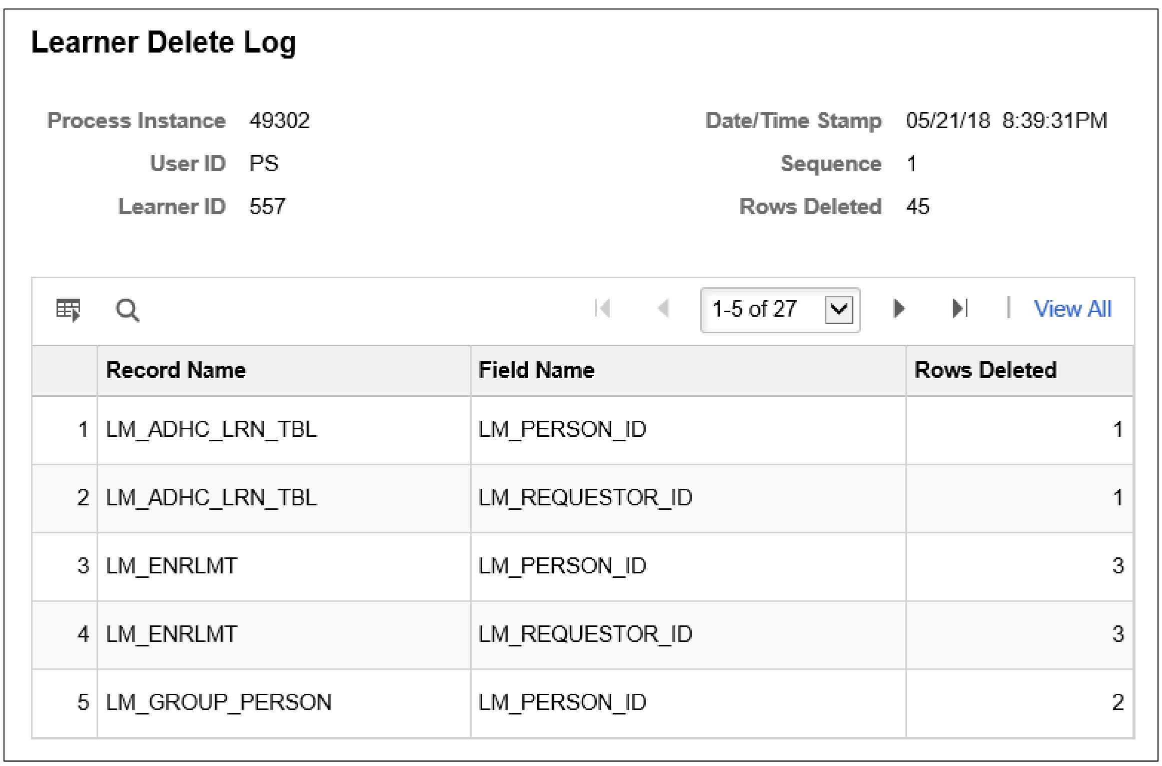
Learner Delete Log Page

Use the Learner Delete Log page (LM_LRNR_ID_DEL_LOG) to review the data that was deleted for a specific learner.

Navigation:

Set Up ELM > System Administration > Database Processes > Learner Delete Log

This example illustrates the Learner Delete Log page.



Learner Delete Log

Process Instance 49302

User ID PS

Learner ID 557

Date/Time Stamp 05/21/18 8:39:31PM

Sequence 1

Rows Deleted 45

1-5 of 27 View All

	Record Name	Field Name	Rows Deleted
1	LM_ADHC_LRN_TBL	LM_PERSON_ID	1
2	LM_ADHC_LRN_TBL	LM_REQUESTOR_ID	1
3	LM_ENRLMT	LM_PERSON_ID	3
4	LM_ENRLMT	LM_REQUESTOR_ID	3
5	LM_GROUP_PERSON	LM_PERSON_ID	2

Process Information

Field or Control	***Description***
Process Instance	Identifies the specific instance of the Learner Delete process that you are reviewing.
Sequence	The Sequence number reflects the order in which the Learner Delete process handles multiple learners. For example, if an instance of the process deletes three learners, the Sequence number *1* is assigned to the first learner to be deleted and *3* is assigned to the last learner to be deleted.
Learner ID	Displays the original learner ID for a single learner who was deleted. A single instance of the process can delete multiple learner IDs, but this page displays information for only one learner at a time.
Date/Time Stamp	Indicates when the Learner Delete process ran. This is the date and time for the process instance, so it is the same for all learners who were processed together.
User ID	Identifies the user who ran the specified instance of the Learner Delete process.
Rows Deleted	Displays the total number of rows (across all records) that were deleted for the specified learner.

Record Details

Field or Control	***Description***
Record Name	Identifies a record where rows were deleted.
Field Name	Identifies the learner ID field in the record. Typically the value is LM_PERSON_ID.
Rows Deleted	Displays the number of rows that were deleted from the specified record.

Setting Up and Performing External Learner Self Registration

This topic discusses how to self register as an external learner.

Pages Used to Set Up and Performing External Learner Self Registration

Page Name	***Definition Name***	***Usage***
Registration Configuration Page	LM_SELF_REG_CONFIG	Set up the self registration process.
Sign In Page	LM_LOGIN_PG_FLU	Sign into the system or begin a new registration.
New User Registration Page	LM_NEW_USER_REG_FL	Register as a new user.

Prerequisite for External Learner Self Registration

To enable self registration for external learners, you must have a guest profile activated for your system.

For more information on guest profiles, see the Implementing Guest User Access topic of *PeopleTools: Portal Technology*.

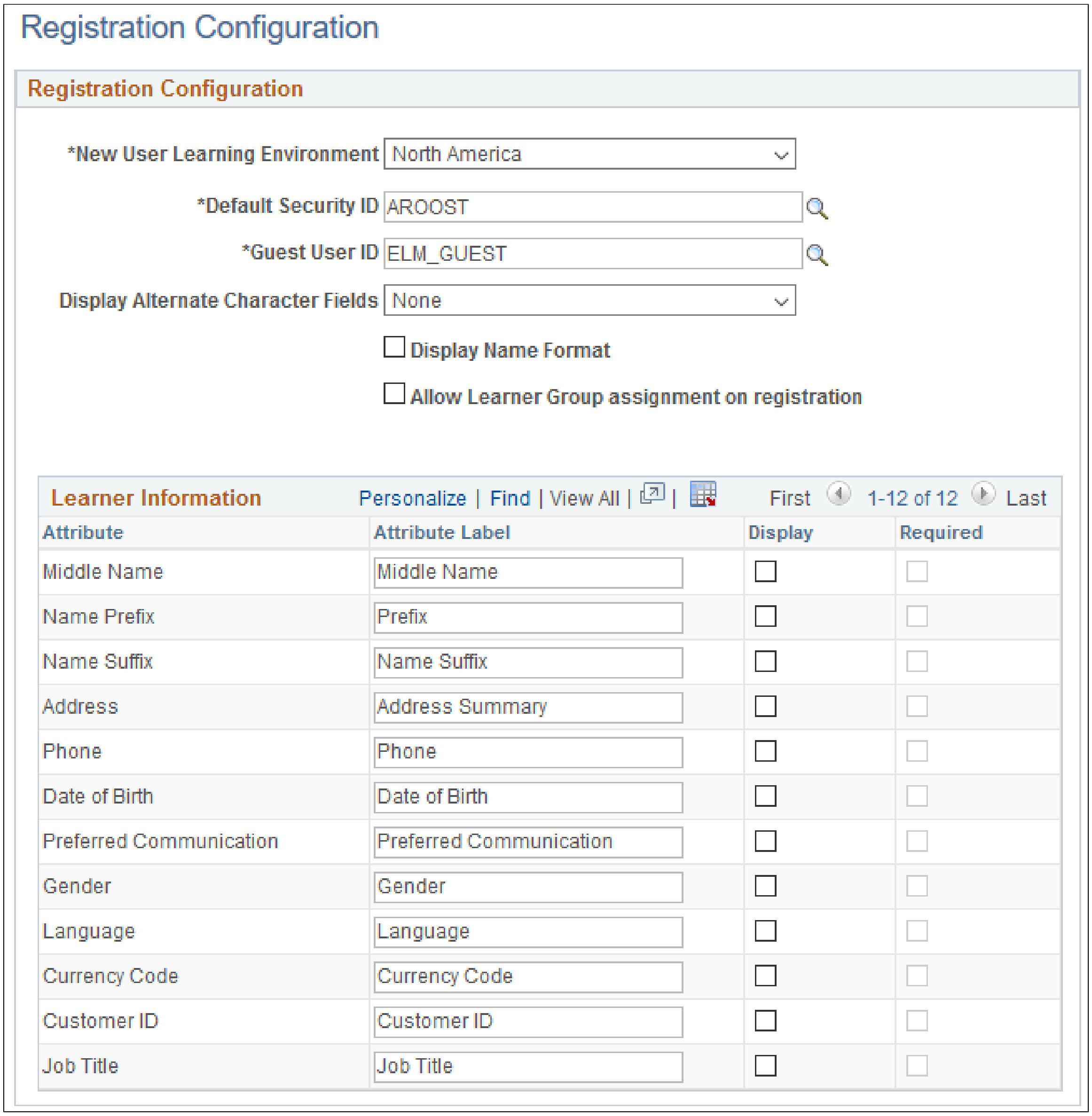
Registration Configuration Page

Use the Registration Configuration page (LM_SELF_REG_CONFIG) to set up the self registration process.

Navigation:

Enterprise Learning > **User Profiles** > **Registration Configuration**

This example illustrates the fields and controls on the Registration Configuration page.



Use this page to set up the appearance and functionality of the New User Registration Page.

Registration Configuration

Field or Control	***Description***
New User Learning Environment	Select the learning environment to which the system assigns newly registered external learners.
Default Security ID	Self-registered external learners receive the same roles and permissions as the user you select here.

Field or Control	***Description***
Guest User ID	Enter the guest user profile that you want to assign to external learners accessing the New User Registration Page.
Display Alternate Character Fields	Use this field to accommodate external learners who speak languages such as Chinese and Japanese that require the entry of proper nouns using characters. Values are: • *Addresses:* Displays fields for entering address information using alternate characters. • *Names:* Displays fields for entering name information using alternate characters. • *Names & Addresses:* Displays fields for entering both name and address information using alternate characters. • *None:* Display no alternate character fields.
Display Name Format	Select to display the Name Format field on the New User Registration Page.
Allow Learner Group assignment on registration	Select to enable the system to assign newly registered external learners to a learner group. The system makes learner group assignments based on the learner group criteria that you establish. For more information on building criteria-based learner groups, see Understanding Learner Group Setup.

Learner Information

By default, the New User Registration Page displays the following required fields:

- User Name
- Password
- Confirm Password
- First Name
- Last Name
- Email Address

The Learner Information grid enables you to display the following additional attributes on the page:

- Middle Name
- Name Prefix

- Name Suffix
- Address
- Phone
- Date of Birth
- Preferred Communication
- Gender
- Language
- Currency Code
- Customer ID
- Job Title

Field or Control	***Description***
Attribute Label	Enter the label displayed for the attribute on the New User Registration page.
Display	Select to display the attribute on the New User Registration page.
Required	Select to make this attribute required.

Sign In Page

Use the Sign In page (LM_LOGIN_PG_FLU) to sign into the system or begin a new registration.

Navigation:

Click the sign in URL provided to you by your organization.

This example illustrates the fields and controls on the Sign In page.

If you are already registered, enter your User Name and Password, and click Sign In.

Field or Control	***Description***
Forgot Password	Click to retrieve or reset your password.
Register Now	Click to access the New User Registration Page.

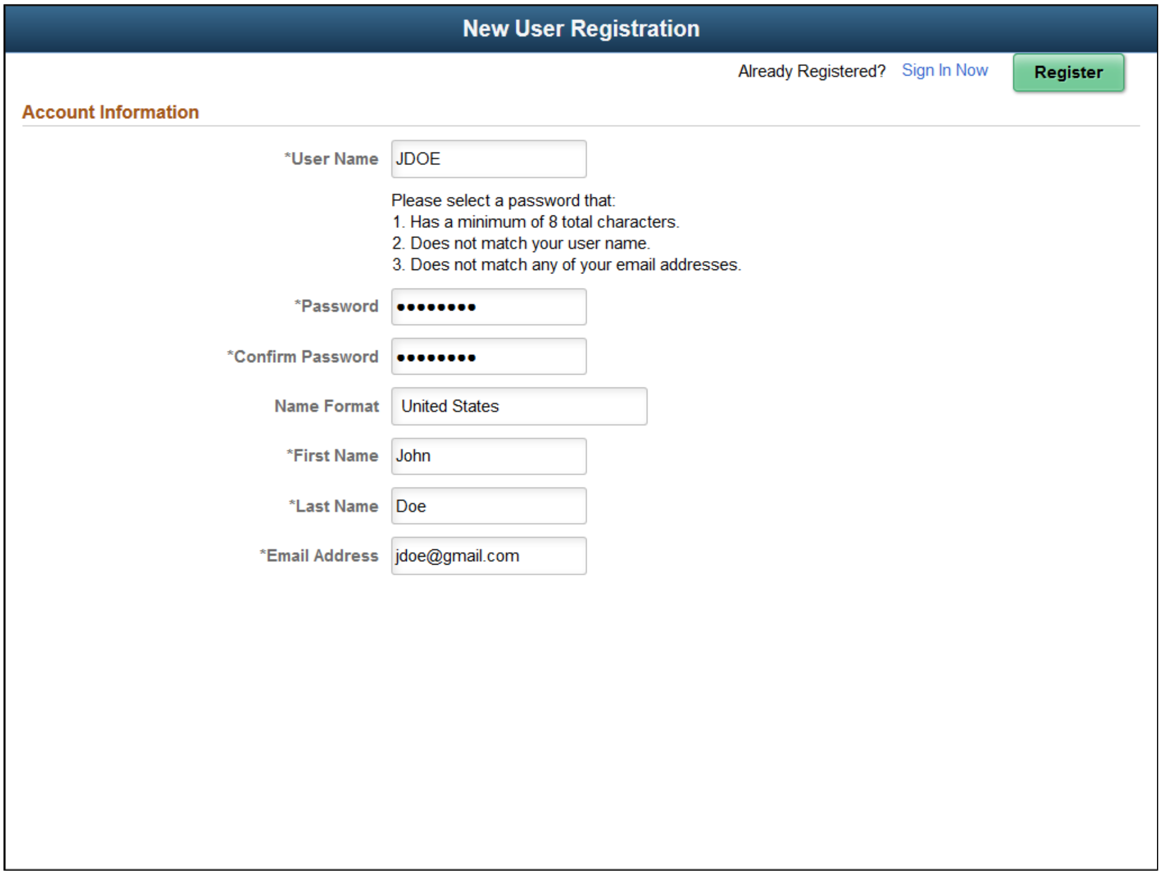
New User Registration Page

Use the New User Registration page (LM_NEW_USER_REG_FL) to register as a new user.

Navigation:

Click the Register Now link on the Sign In page.

This example illustrates the fields and controls on the New User Registration page.



Field or Control	***Description***
Sign In Now	If you have already registered, click to go to the Sign In Page.

Field or Control	*Description*
Register	Click to submit your self registration. When you click this button the system verifies that you have entered valid values in all of the required fields. Upon successful registration the system: • Takes you to the Learning Dashboard where you can access self-service learning transactions. • Generates an email notification welcoming you to the learning organization. In addition, if you entered registration information that meets the criteria for a learning group and the system allows automatic learner group assignment, the system assigns you to the appropriate learner group. **Note:** The system uses the delivered LM_EXT_LRNR_SELF_REG notification template to generate the welcome email. The template references the LM_ORG_NAME text ID to capture the organization name used in the welcome email. For more information on notification templates and text IDs, see Maintaining Notification Templates and Understanding the Text Catalog.

Account Information

Enter values in all the required fields and any other fields you want to define.

Note: The fields displayed and required on this page depend on the parameters defined on the Registration Configuration Page.

Chapter 7

Managing the ELM Full Sync Integration Guided Process

Understanding the ELM Full Sync Integration Guided Process

PeopleSoft Enterprise Learning Management (ELM) integrates with other applications to enable the sharing of person and organization data. You can use the integration points that are delivered with PeopleSoft ELM to import data for internal learners and departments from PeopleSoft Human Capital Management (HCM). PeopleSoft HCM remains the system of record for all of the imported data. This data can be viewed, but not changed in PeopleSoft ELM.

Note: The delivered integration points are designed to work specifically with PeopleSoft HCM. You can import data from any XML-compliant HR application, but that requires modifications to the delivered integration points.

Integration points are divided into two distinct categories: full sync and incremental sync. PeopleSoft ELM uses full sync integration points during system implementation to import all data for a given set of HCM tables. After all full sync points are processed, you activate incremental sync integration points to ensure that additions, modifications, and deletions of data in PeopleSoft HCM are imported into PeopleSoft ELM.

To manage integration between PeopleSoft HCM and ELM, you use Integration Broker technology to configure, activate, and monitor integration that synchronizes a given set of HCM tables. In addition, you use Enterprise Components integration definitions and processes to configure full sync data rules and to initiate the full sync integration points.

When you run a full or incremental integration point, the system loads the imported data either directly into the PeopleSoft ELM tables or sends it to a staging table for validation before it is loaded. The process depends on the type of data that is being imported. Because of data dependencies, some integration points must be run in a specific order. Generally, data that is updated frequently or for which there is a high volume, such as learner and workforce data, goes to a staging table first.

To improve and simplify the processing of full sync integration points between PeopleSoft HCM and ELM, Oracle provides the ELM Full Sync Integration Guided Process. This feature enables users to initiate and monitor full sync integration points between PeopleSoft HCM and PeopleSoft ELM, including the process that validates and loads ELM data from a staging table.

Users can initiate and monitor the following full sync integration points:

- Foundation Data
  - COUNTRY_FULLSYNC
  - CURRENCY_FULLSYNC
  - STATE_FULLSYNC

    - SETID_INITIALIZE

- Organization Data
    - DEPT_FULLSYNC
    - COMPANY_FULLSYNC
    - POI_TYPE_TBL_FULLSYNC
    - BUS_UNIT_HR_FULLSYNC
    - JOBCODE_FULLSYNC
- Position Data - POSITION_FULLSYNC
- Person Data
    - PERSON_BASIC_FULLSYNC
    - WORKFORCE_FULLSYNC
- Employee Photo Data - USER_PHOTO_FULLSYNC

To process this integration, users need to configure Integration Broker for both their PeopleSoft HCM and PeopleSoft ELM environments so that they can communicate. The easiest way to do this is with the Integration Network Workcenter delivered with PeopleTools.

For more information on the Integration Network Workcenter, see the product documentation for *PeopleTools: Integration Broker Administration*.

Common Elements for the ELM Full Sync Integration Guided Process

The following table defines some of the common terms associated with the ELM Full Sync Integration Guided Process.

Field or Control	***Description***
Integration Broker	PeopleSoft Integration Broker is a middleware technology that performs asynchronous and synchronous messaging among internal systems and third-party systems.
Gateway	The gateway manages different types of messages that flow into and out of your PeopleSoft application. The gateway has specific connectors and properties that manage different types of internal and third-party messages.

Field or Control	*Description*
Domain	This is an application server pub/sub service that must be active in order to facilitate Integration Broker messaging.
Message Node	A message node represents any organization, application, or system that will be part of an integration. For example, a node can represent a customer, a business unit, a supplier, another trading partner, or an external or third-party software system. Node definitions define the locations to or from which messages can be routed.
Default Local and Remote Nodes	Each PeopleSoft Integration Broker database involved in an integration point must contain a default local node definition for itself and a remote node definition for each of the other nodes involved. Local and remote nodes are concepts relative to the database in which the nodes are defined. If a user is signed on to Database A, which has Node A defined, then Node A is local. If a user is signed on to Database B, then Node A is defined as remote. For example, suppose that the following definitions exist in the Node A database: • NODE_A (default local) • NODE_B (remote) Then the following definitions must exist in the Node B database for it to integrate with Node A: • NODE_A (remote) • NODE_B (default local) The only local node definition used by PeopleSoft Integration Broker is the one designated as the Default Local, which represents the database that the user is signed on to.
Service Operation	A service operation represents integration between one or more applications or systems. It has a specific configuration that determines how the operation will be processed, synchronously or asynchronously. In addition, it contains routings that determine the direction, inbound or outbound, of the service operation. A service operation has one or more handlers that contain and run the programming logic for sending or receiving the message, manipulating message content, and so on.

Field or Control	***Description***
Queues	These queue service operations for processing.
Integration Point	This is another name for a service operation.
Handler	This is associated with a service operation. A handler contains specific programming logic for sending or receiving a message or for manipulating message content.
Routing	This is associated with a service operation. A routing contains specific information that determines the direction of the integration, inbound or outbound. A routing may have additional parameters to transform a message when it is sent or received.
Integration Groups	Integration groups provide a way of grouping like services that are associated with service operations.
Full Synchronization	This type of synchronization synchronizes *all* data between a source and target application.
Incremental Synchronization	This type of synchronization synchronizes incremental changes between a source and target application.
Introspection and Deployment	This is the process of identifying integration setup that needs to be activated or created to deploy service operations (integration points) between two PeopleSoft applications.
Integration Network Workcenter	This is a PeopleTools feature that consolidates many of the integration setup tasks into one centralized workcenter.
Guided Process	This is a feature in PeopleSoft HCM that enables users to define actions that must be completed within a specific business process. Optionally, this feature can prompt users with up-front questions as to what actions they want to perform within the business process. It then generates a PeopleTools Activity Guide instance and transfers the user into a Workcenter page where the user is guided through the steps to complete the business process.
Activity Guide	This is a PeopleTools feature that generates a specific user instance of a pagelet area in a workcenter that contains actions a user can complete within a specific workcenter. The activity guide pagelet area tracks and monitors the status of the completed actions.

Field or Control	*Description*
Integration Process Request	This is a feature that automates and streamlines the initiation of one or more full sync integrations from PeopleSoft HCM. This feature also includes the ability to monitor and track the status of an Integration Process Request.
Full Data Publish Rules	Full data publish rules control how a full-sync integration processes. You define these rules with Enterprise Components.
Full Data Publish Process	This process initiates and publishes full-sync integrations.
Process FullSync Data	This is an ELM process that retrieves data loaded into an ELM staging table and loads that data into the final ELM table.

Setting Up Integration Broker for HCM

This topic provides instructions for configuring Integration Broker for the HCM side of the integration between PeopleSoft HCM and PeopleSoft ELM. It discusses how to:

- Configure local and remote message nodes.
- Configure Single Signon.
- Configure the gateway.
- Confirm domain activation.
- Confirm queue activation.

This documentation describes a very specific Integration Broker setup between HCM and ELM. For more in-depth information on Integration Broker, see the product documentation for *PeopleTools: Integration Broker* and *PeopleTools: Integration Broker Administration*.

Configuring Local and Remote Message Nodes

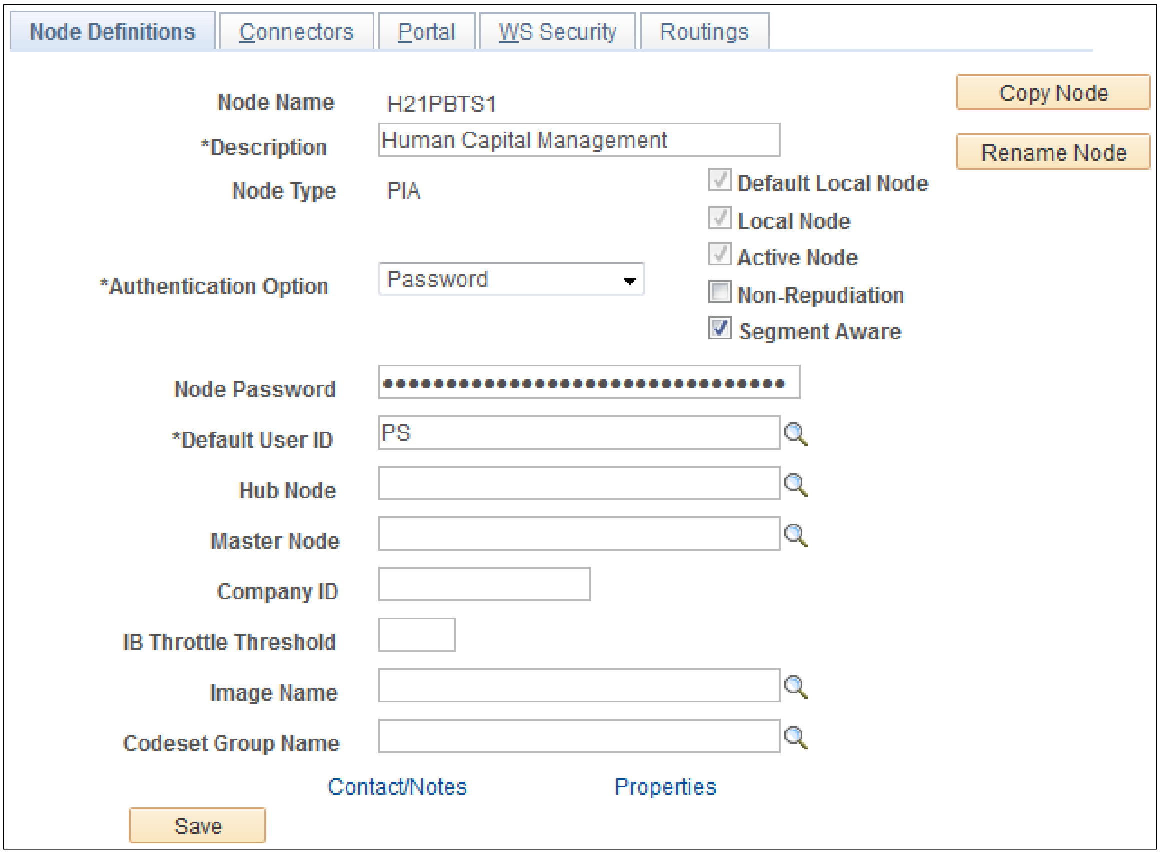
In your HCM environment, you create a local HCM node and a remote ELM node.

Configuring the Local HCM Node

To create a default local node for the HCM database in your HCM environment:

1. Access the Node Definitions page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes**).

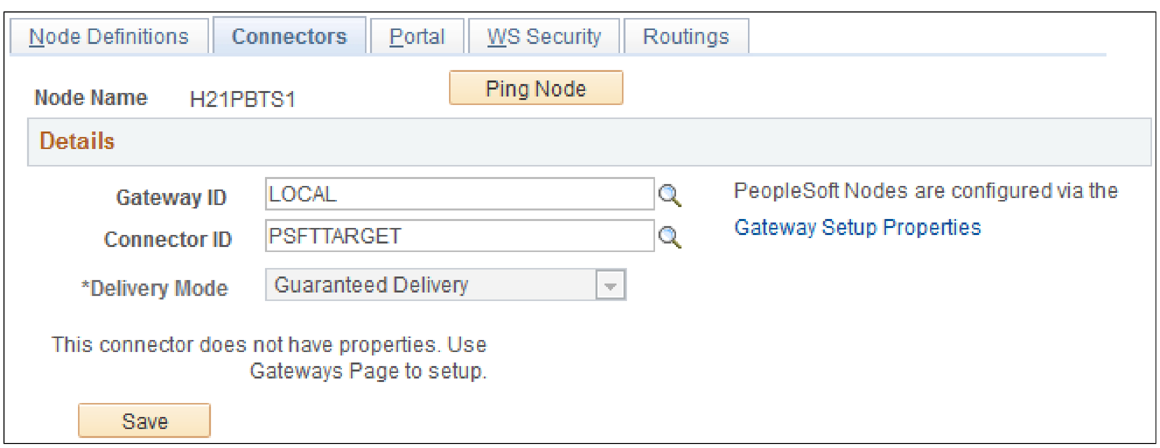
This example illustrates the setup on the Nodes Definitions page for a local HCM node.



The **Authentication Option** is defined as *Password* so you must specify a password for this node. Because this node will also be defined in your ELM environment, the password specified in ELM must be the same, otherwise you will encounter an integration error.

2. Access the Connectors page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes**).

   This example illustrates the setup on the Connectors page for a local HCM node.



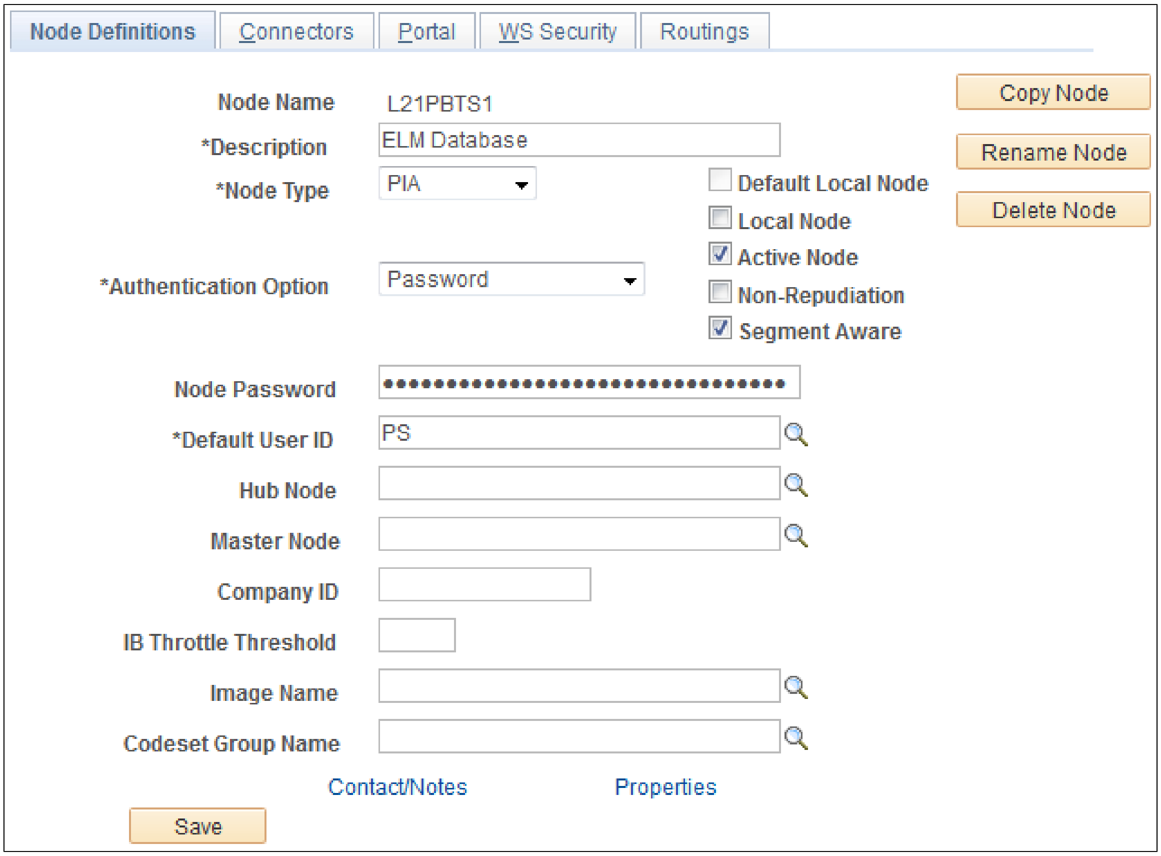
Confirm that the value of the **Connector ID** field is *PSFTTARGET*.

Configuring the Remote ELM Node

To create a remote node for the ELM database in your HCM environment:

1. Access the Node Definitions page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes**).

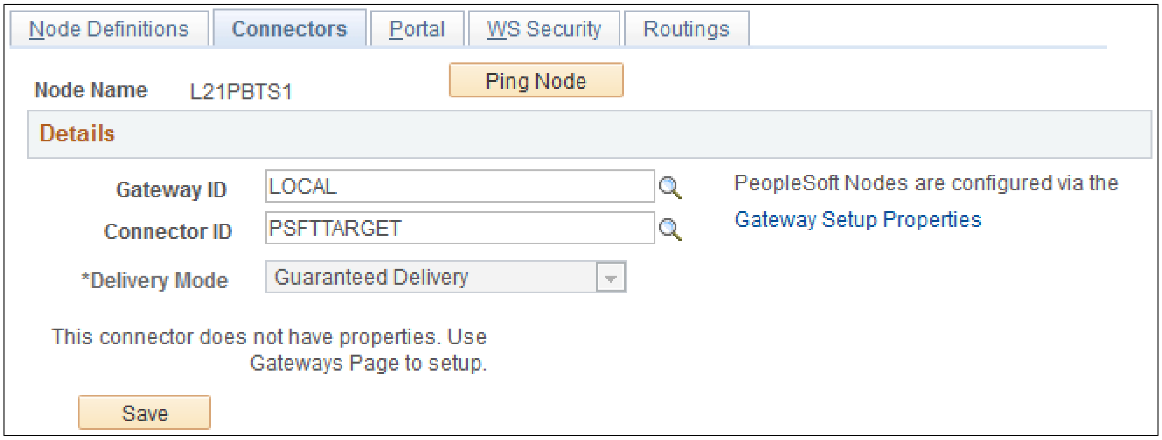
   This example illustrates the setup on the Nodes Definitions page for a remote ELM node.



   Make sure that the Node Name and Node Password that you define for the remote ELM node match the Node Name and Node Password of the default local ELM node that you define in your ELM environment.

2. Access the Connectors page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes**).

This example illustrates the setup on the Connectors page for a remote ELM node.



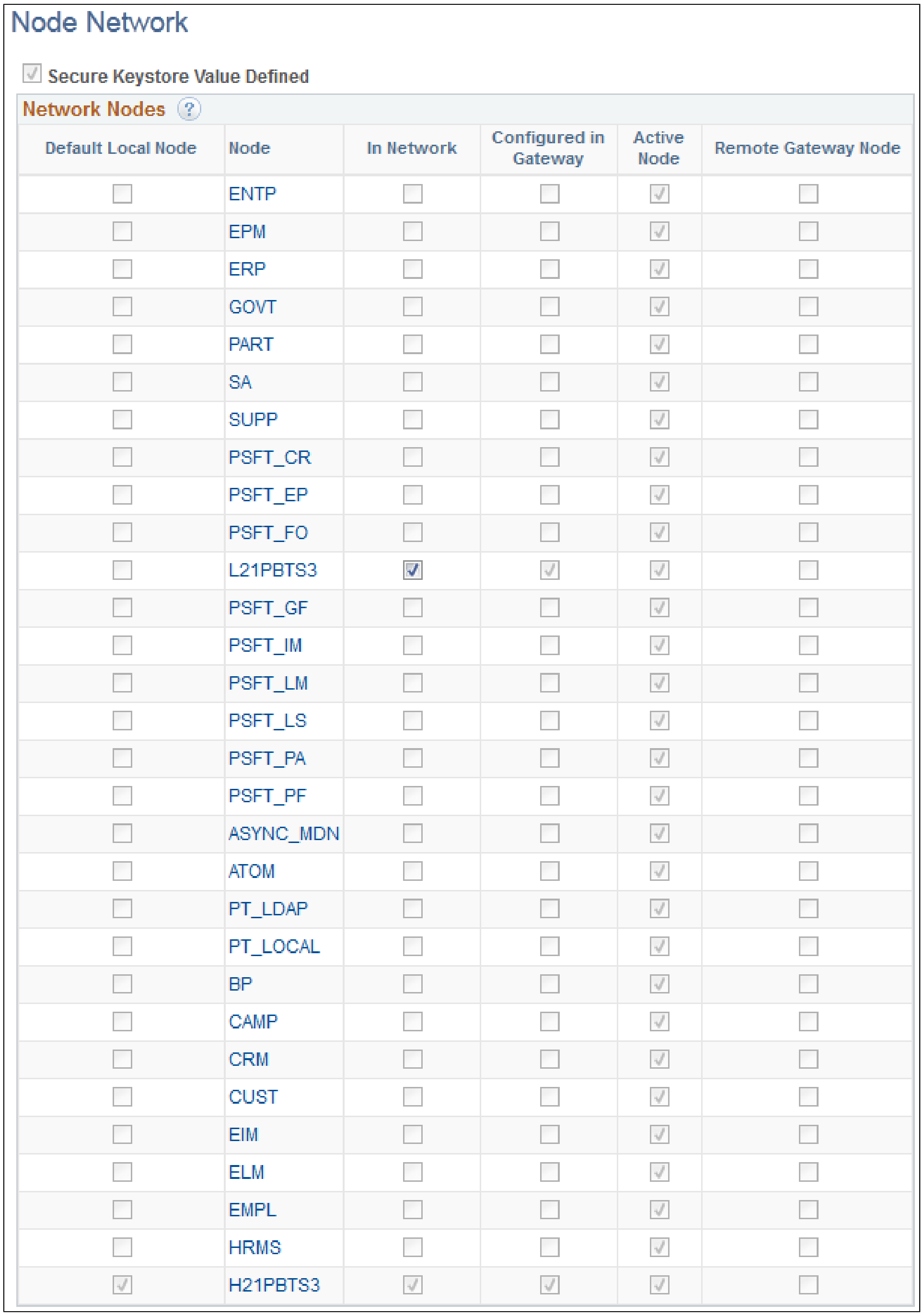
Confirm that the value of the **Connector ID** field is *PSFTTARGET*.

Adding the Remote ELM Node to the Network

After configuring the remote ELM node, you must add it to the node network. To do this:

1. Click the Node Network link in the Integration Network Workcenter (**PeopleTools** > **Integration Broker** > **Integration Network WorkCenter**).
2. On the Node Network page, select the In Network check box for your remote ELM node.

This example illustrates the Node Network page with the In Network check box selected for the remote ELM node.



Node Network

✓ Secure Keystore Value Defined

Network Nodes

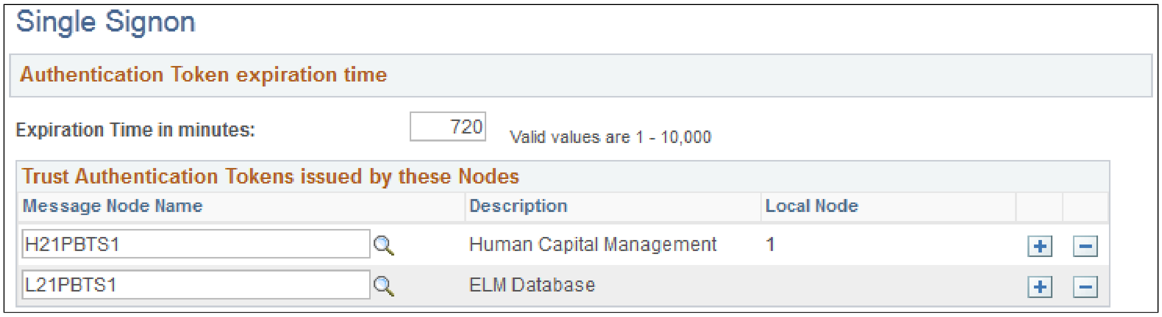
Default Local Node	Node	In Network	Configured in Gateway	Active Node	Remote Gateway Node
	ENTP			✓	
	EPM			✓	
	ERP			✓	
	GOVT			✓	
	PART			✓	
	SA			✓	
	SUPP			✓	
	PSFT_CR			✓	
	PSFT_EP			✓	
	PSFT_FO			✓	
	L21PBTS3	✓	✓	✓	
	PSFT_GF			✓	
	PSFT_IM			✓	
	PSFT_LM			✓	
	PSFT_LS			✓	
	PSFT_PA			✓	
	PSFT_PF			✓	
	ASYNC_MDN			✓	
	ATOM			✓	
	PT_LDAP			✓	
	PT_LOCAL			✓	
	BP			✓	
	CAMP			✓	
	CRM			✓	
	CUST			✓	
	EIM			✓	
	ELM			✓	
	EMPL			✓	
	HRMS			✓	
✓	H21PBTS3	✓	✓	✓	

3. Click Save.

Configuring Single Signon

Because the two message nodes that you created for HCM and ELM represent PeopleSoft applications, you must update the trusted nodes for the Single Signon setup to reflect these new nodes. Access the Single Signon page (**PeopleTools** > **Security** > **Security Objects** > **Single Signon**)

This example illustrates the Single Signon page in an HCM environment with the local HCM and remote ELM nodes added.



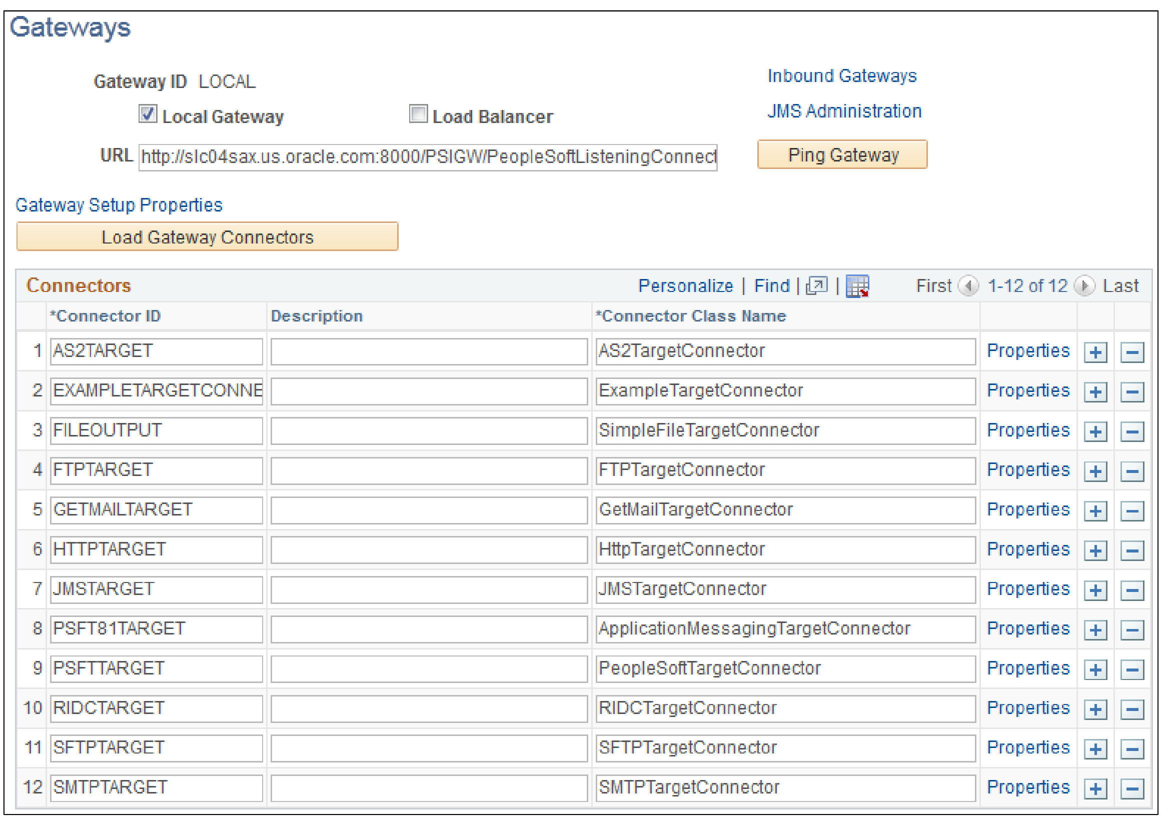
Configuring the Gateway

The Integration Gateway platform manages the actual receipt and delivery of messages passed between systems through the Integration Broker. Messages are received through listening connectors and are delivered from target connectors. The Gateway Manager is a dispatcher for messages that flow through the Integration Gateway.

To configure a gateway between your HCM and ELM databases so that they can communicate with each other:

1. Access the Gateways page for the LOCAL Gateway ID from the Integration Network Workcenter (**PeopleTools** > **Integration Broker** > **Integration Network Workcenter**).

   This example illustrates a gateway set up to communicate between HCM and ELM environments.



2. Specify the **URL** with the format *http://machinename:port/PSIGW/PeopleSoftListeningConnector*. The *machinename:port* is the machine name and port, host name, or IP address of the web server hosting the gateway.

3. Click the **Ping Gateway** button to confirm that it is active.

   This example illustrates the message that appears when you click the Ping Gateway button for an active gateway.

4. Click the **Load Gateway Connectors** button to have PeopleSoft Integration Broker examine the properties of all installed target connectors and load those properties into the gateway definition. All the connectors appear in the Connectors grid, and the properties of each connector are updated to reflect the current state.

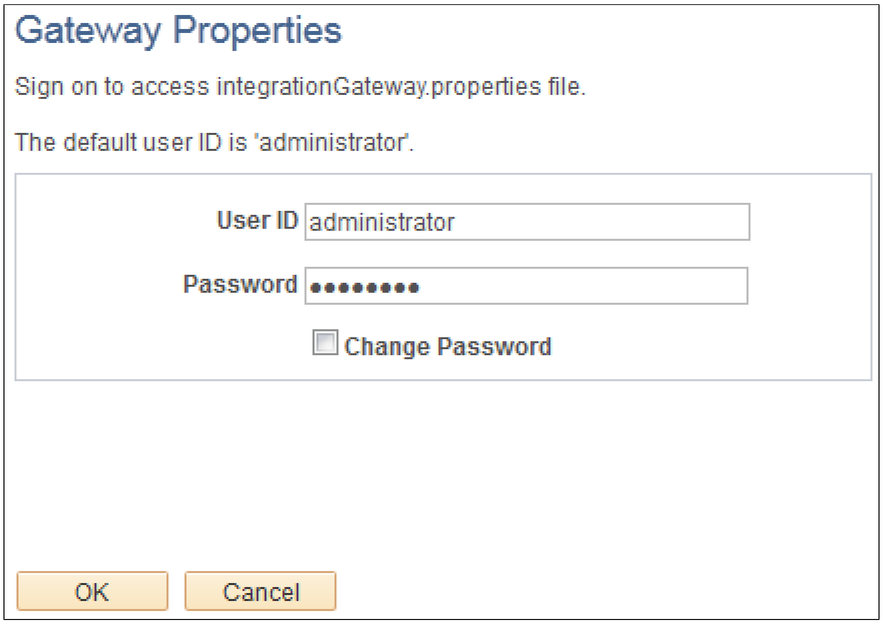
   The Connectors grid on the Gateways page lists the target connectors registered with the current gateway. Initially, none of the delivered connectors is loaded and the grid is empty. You can load target connectors automatically by clicking the Load Gateway Connectors button or by manually entering information in the grid.

   Note: The Load Gateway Connectors button never overrides existing information. It adds only missing information, so it doesn't affect manually edited values. If you modified a connector, the button loads new and modified properties and does not interfere with existing properties.

   Because communication is between PeopleSoft applications, it is important that the Connector ID for PSFTTARGET is listed in the Connectors grid.

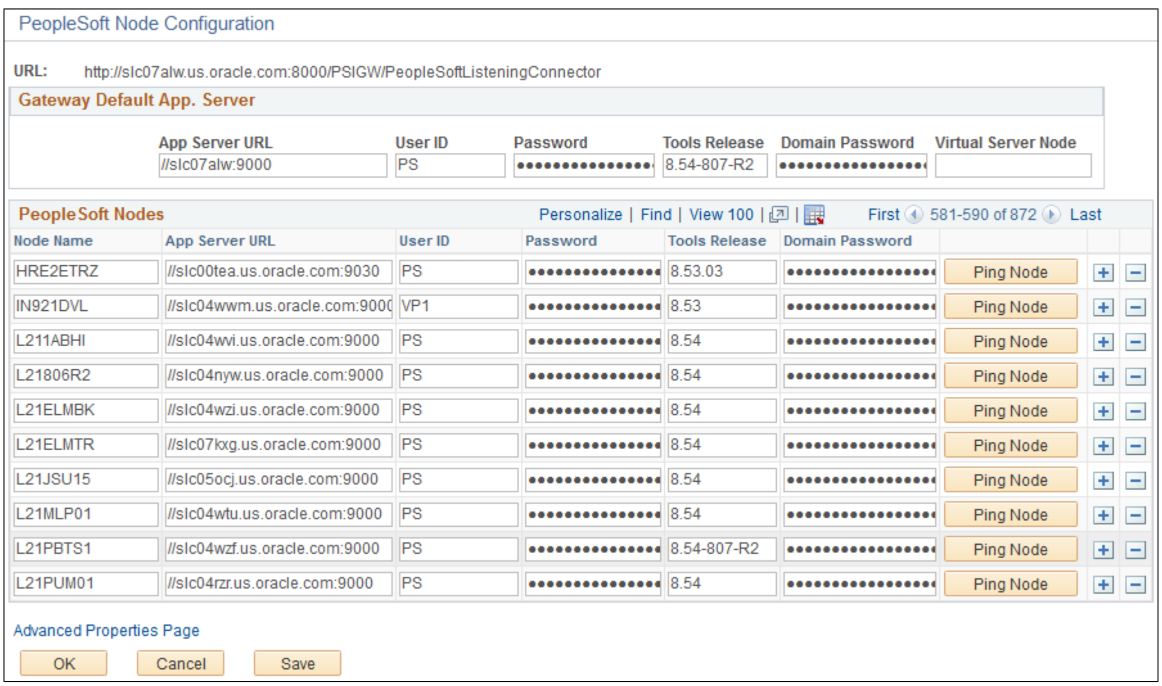
5. Click the Gateway Setup Properties link to access the Gateways Properties page.

This example illustrates the fields and controls on the Gateway Properties page.



6. Enter a valid User ID and Password and click OK to access the PeopleSoft Node Configuration page.

   This example illustrates the fields and controls on the PeopleSoft Node Configuration page.



The PeopleSoft Node Configuration page enables you to specify a Gateway Default Application Server and the local target nodes.

When the integration gateway receives an inbound message, it receives the name of the message and the target node for the message. If the message does not have a target node, the system uses the Gateway Default Application Server settings.

If the target node is specified for the message, however, then the system searches the PeopleSoft nodes specified for the gateway so that it can direct the message properly.

7. For the integration between PeopleSoft HCM and PeopleSoft ELM, you do not have to specify a Gateway Default Application Server. However, you do have to enter the HCM and ELM nodes that you created in the PeopleSoft node grids.

   This example illustrates how you might configure the local HCM node.

   This example illustrates how you might configure the remote ELM node.

Field or Control	***Description***
App Server URL (application server URL)	Enter the machine name and the Oracle Jolt port number. You can find the Jolt port number in the JOLTListener section of the psappsrv.cfg file or by using psadmin.exe to review the JSL port setting for the application server configuration.
User ID and **Password**	Enter the User ID and Password that you specified when you created the application server domain. PeopleSoft Integration Broker automatically encrypts this password entry.
Tools Release	Enter the version number installed on the application server.

8. Click the Save button.

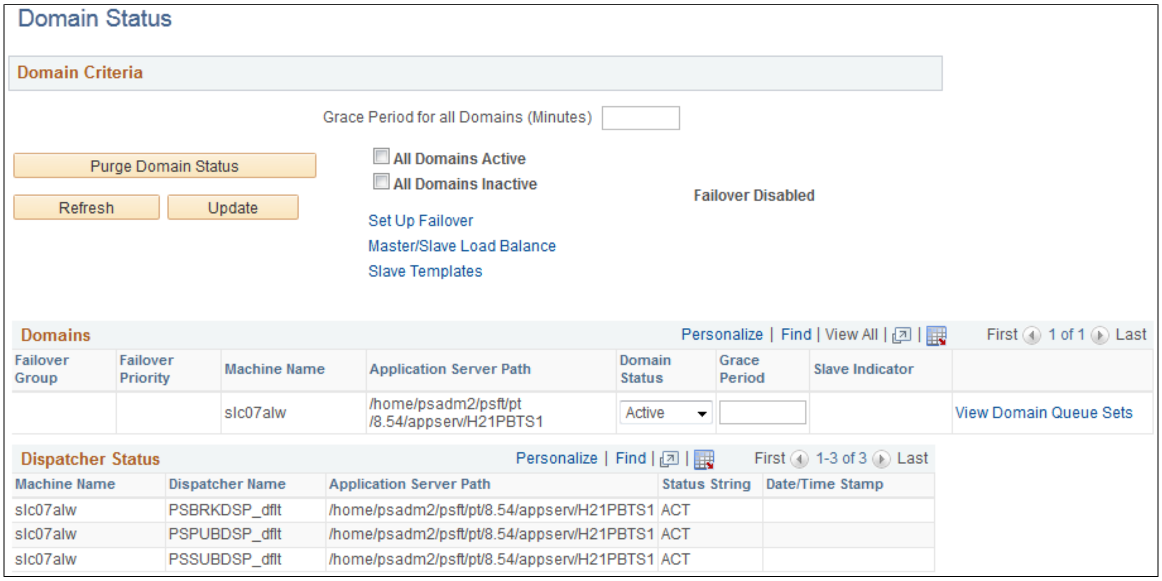
Note: After saving, if you click the Ping Node button for your local HCM node, the system should return a successful result. If your integration setup is not yet complete for your ELM environment, however, clicking the Ping Node button for your remote ELM node will return an authentication error.

Confirming Domain Activation

You must verify that the Integration Broker domain is active so that the integration between PeopleSoft HCM and PeopleSoft ELM can process.

Access the Domain Status page from the Integration Network Workcenter (**PeopleTools** > **Integration Broker** > **Integration Network Workcenter**).

This is an example of an active domain for an HCM environment.



The Domain Status page enables you to view the domains that have pub/sub servers on them that are running against the application database. You also use this page to set domain grace periods manually, allowing processing in a domain to finish before you pause the processing or take the domain offline.

Make sure that the **Domain Status** field is set to *Active* for the machine name listed in the Domains grid, and then click the **Update** button. This action activates the domain and when you click **Refresh**, you will see the Dispatcher Status update the Status String to *ACT* (Active).

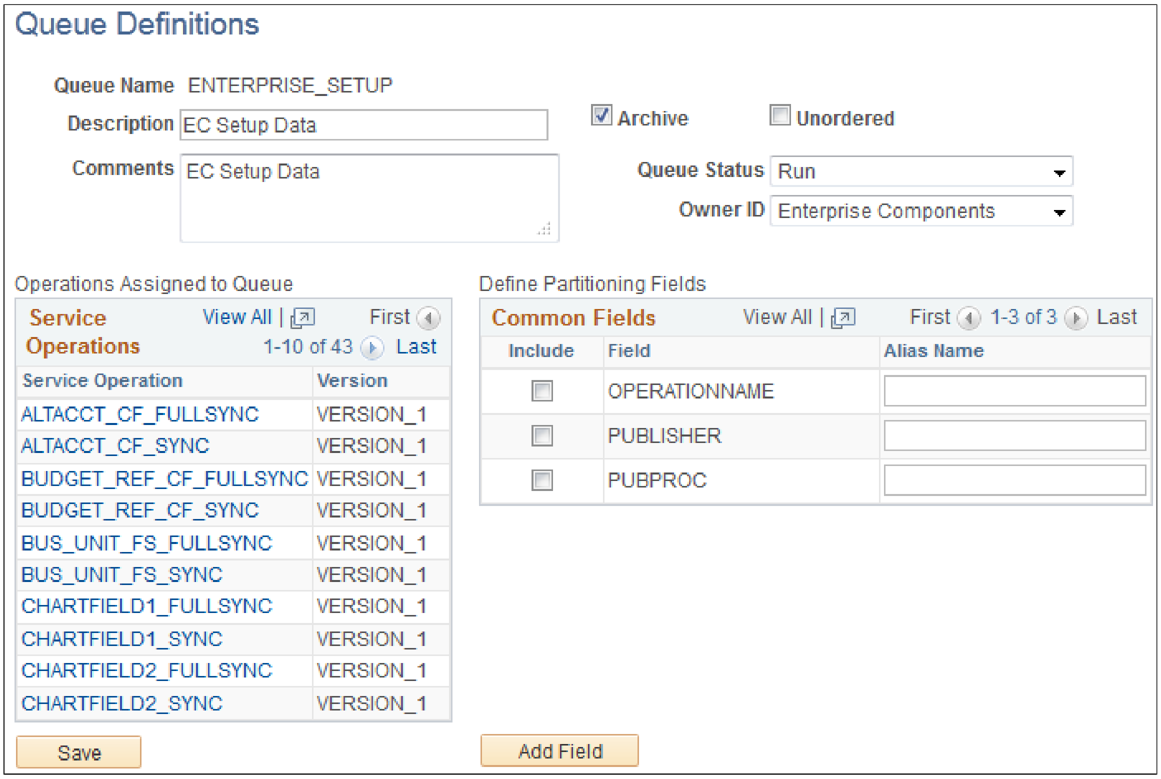
Confirming Queue Activation

For the full sync integration points in ELM Full Sync Integration Guided Process, the following integration broker queues must be active in your HCM environment:

- ENTERPRISE_SETUP
- TBLSET_CONTROL
- PERSON_SETUP
- HR_SETUP
- PERSON_DATA
- EMPL_PHOTO

To confirm that the queues are active, access the Queue Definitions page for each queue (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Queues**).

This example illustrates the fields and controls on the Queue Definitions page.



Make sure that the **Queue Status** field has a value of *Run* and click **Save**. Repeat these steps for each queue that needs to be active.

Note: For the EMPL_PHOTO queue, it is also necessary for the **Unordered** check box to be deselected.

Setting Up Integration Broker for ELM

This topic provides instructions for configuring Integration Broker for the ELM side of the integration between PeopleSoft HCM and PeopleSoft ELM. It discusses how to:

- Configure local and remote message nodes.
- Configure Single Signon.
- Configure the gateway.
- Confirm domain activation.
- Confirm queue activation.

This documentation describes a very specific Integration Broker setup between HCM and ELM. For more in-depth information on Integration Broker,see the product documentation for *PeopleTools: Integration Broker* and *PeopleTools: Integration Broker Administration*.

Configuring Local and Remote Message Nodes

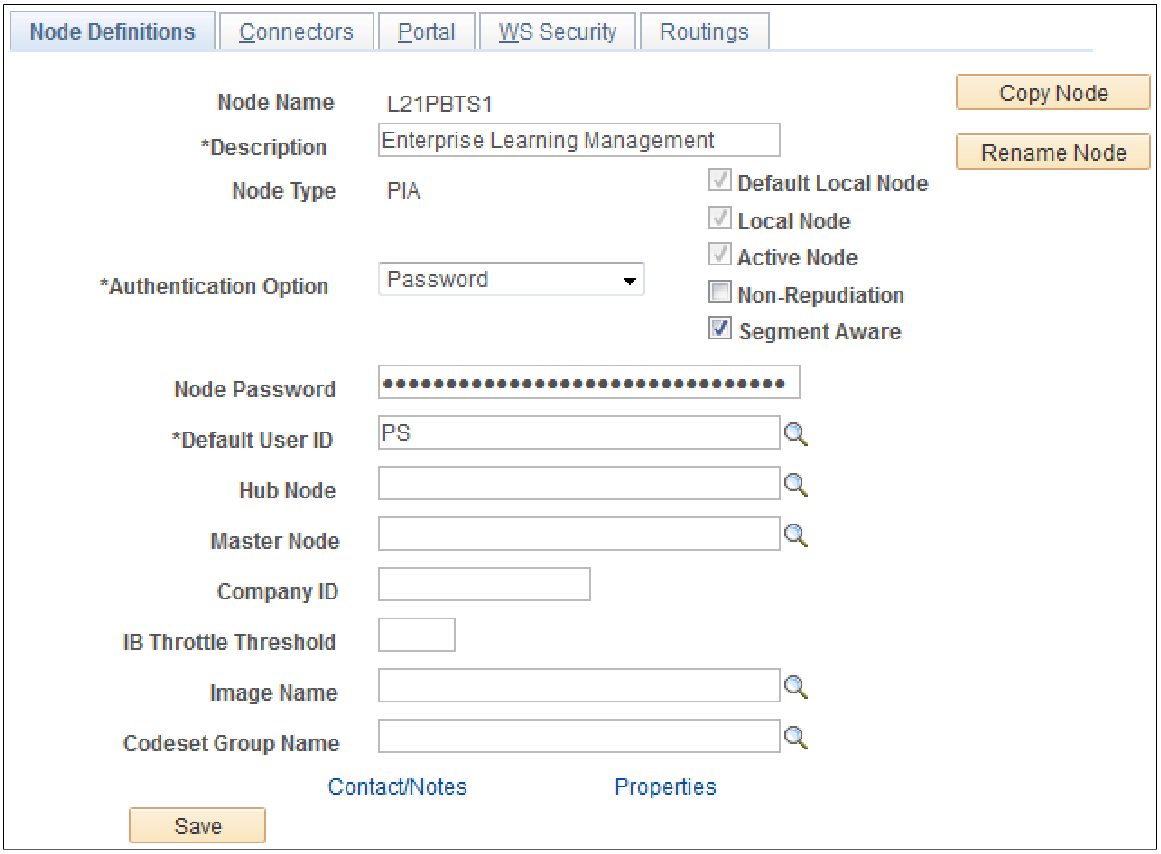
In your ELM environment, you create a local ELM node and a remote HCM node.

Configuring the Local ELM Node

To create a default local node for the ELM database in your ELM environment:

1. Access the Node Definitions page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes**).

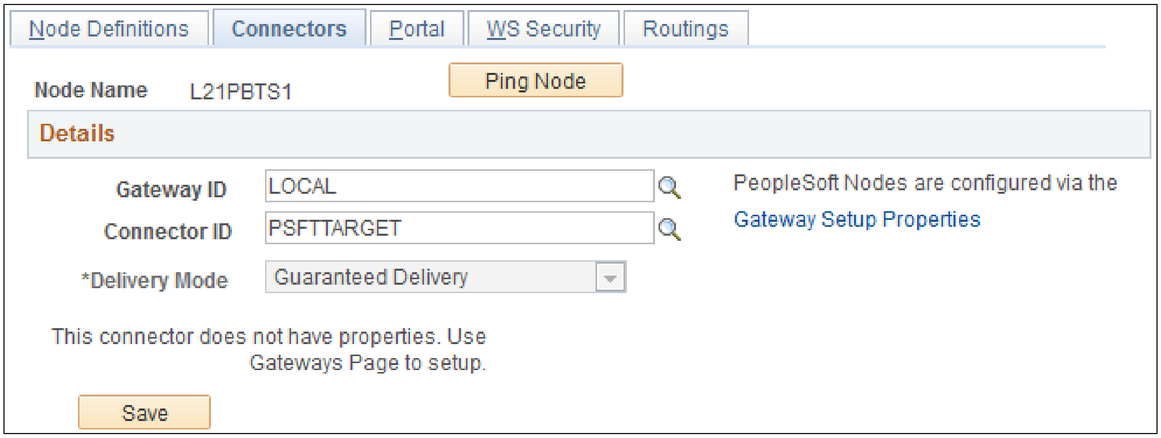
   This example illustrates the setup on the Nodes Definitions page for a local HCM node.

   The **Authentication Option** is defined as *Password* so you must specify a password for this node. Because this node will also be defined in your HCM environment, the password specified in HCM must be the same, otherwise you will encounter an integration error.

2. Access the Connectors page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes**).

This example illustrates the setup on the Connectors page for a local ELM node.



Confirm that the value of the **Connector ID** field is *PSFTTARGET*.

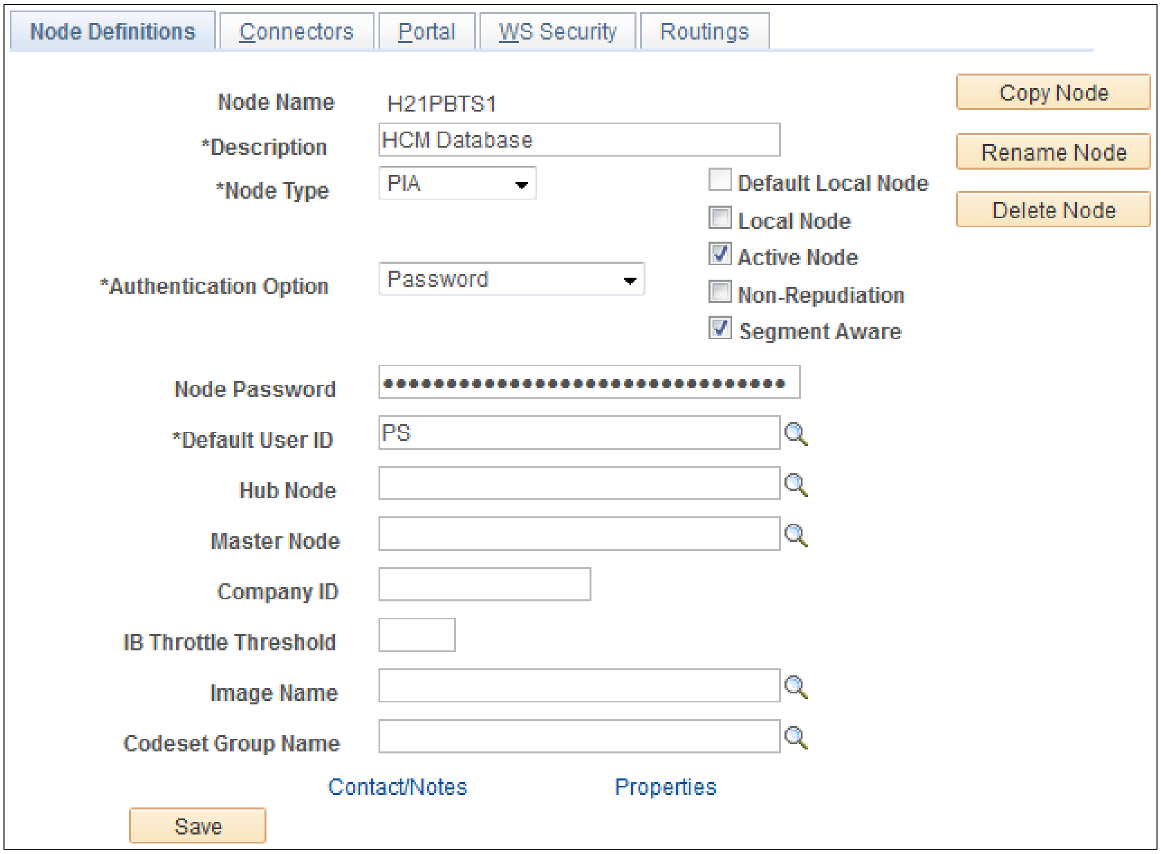
Note: If your ELM node is used as a single signon node and it is referenced by any ELM components that are displayed as part of a portal, you must define values for the **Content URI Text** and **Portal URI Text** fields on the Portal page.
For more information on defining portal nodes, see the product documentation for *PeopleTools: Portal Technology*.

Configuring the Remote HCM Node

To create a remote node for the HCM database in your ELM environment:

1. Access the Node Definitions page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes**).

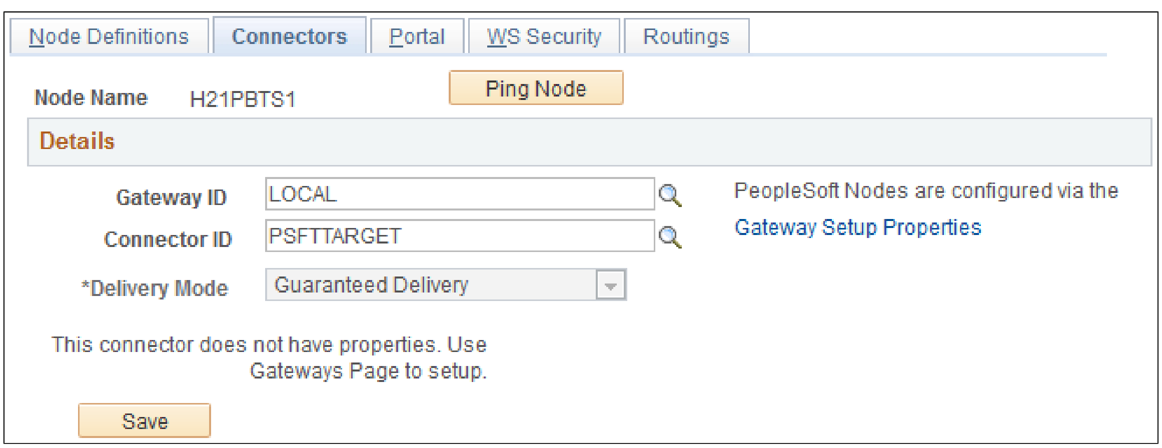
This example illustrates the setup on the Nodes Definitions page for a remote HCM node.



Make sure that the Node Name and Node Password that you define for the remote HCM node match the Node Name and Node Password of the default local HCM node that you define in your HCM environment.

2. Access the Connectors page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Nodes**).

   This example illustrates the setup on the Connectors page for a remote HCM node.



   Confirm that the value of the **Connector ID** field is *PSFTTARGET*.

Adding the Remote HCM Node to the Network

After configuring the remote HCM node, you must add it to the node network. To do this:

1. Click the Node Network link in the Integration Network Workcenter (**PeopleTools** > **Integration Broker** > **Integration Network WorkCenter**).
2. On the Node Network page, select the In Network check box for your remote HCM node.

   This example illustrates the Node Network page with the In Network check box selected for the remote HCM node.

Node Network

☑ Secure Keystore Value Defined

Network Nodes

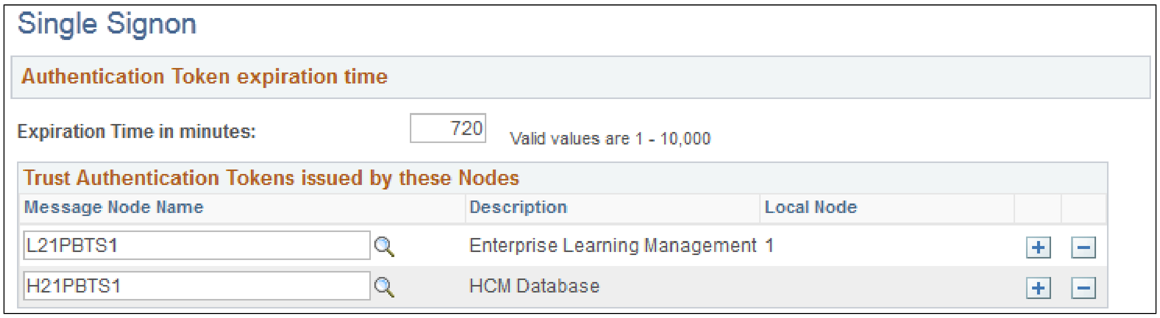
Default Local Node	Node	In Network	Configured in Gateway	Active Node	Remote Gateway Node
☐	PSFT_CR	☐	☐	☑	☐
☐	PSFT_ELM	☐	☐	☑	☐
☐	PSFT_EP	☐	☐	☑	☐
☐	PSFT_FO	☐	☐	☑	☐
☐	PSFT_GF	☐	☐	☑	☐
☐	PSFT_HR	☐	☐	☑	☐
☐	PSFT_IM	☐	☐	☑	☐
☐	PSFT_LS	☐	☐	☑	☐
☐	PSFT_PA	☐	☐	☑	☐
☐	PSFT_PF	☐	☐	☑	☐
☐	PSFT_PIP_SEC_SAP	☐	☐	☐	☐
☐	ERP	☐	☐	☑	☐
☐	CAMP	☐	☐	☑	☐
☐	CUST	☐	☐	☑	☐
☐	EIM	☐	☐	☑	☐
☐	EMPL	☐	☐	☑	☐
☐	ENTP	☐	☐	☑	☐
☐	GOVT	☐	☐	☑	☐
☐	PART	☐	☐	☑	☐
☐	STAF	☐	☐	☑	☐
☐	SUPP	☐	☐	☑	☐
☐	ELM	☐	☐	☑	☐
☐	HRMS	☐	☐	☑	☐
☐	SA	☐	☐	☑	☐
☐	PT_LDAP	☐	☐	☑	☐
☐	PT_LOCAL	☐	☐	☑	☐
☐	BP	☐	☐	☑	☐
☐	CRM	☐	☐	☑	☐
☐	EPM	☐	☐	☑	☐
☐	ASYNC_MDN	☐	☐	☑	☐
☐	ATOM	☐	☐	☑	☐
☐	H21PBTS3	☑	☑	☑	☐
☑	L21PBTS3	☑	☑	☑	☐

3. Click Save.

Configuring Single Signon

Because the two message nodes that you created for HCM and ELM represent PeopleSoft applications, you must update the trusted nodes for the Single Signon setup to reflect these new nodes. Access the Single Signon page (**PeopleTools** > **Security** > **Security Objects** > **Single Signon**

This example illustrates the Single Signon page in an ELM environment with the local ELM and remote HCM nodes added.



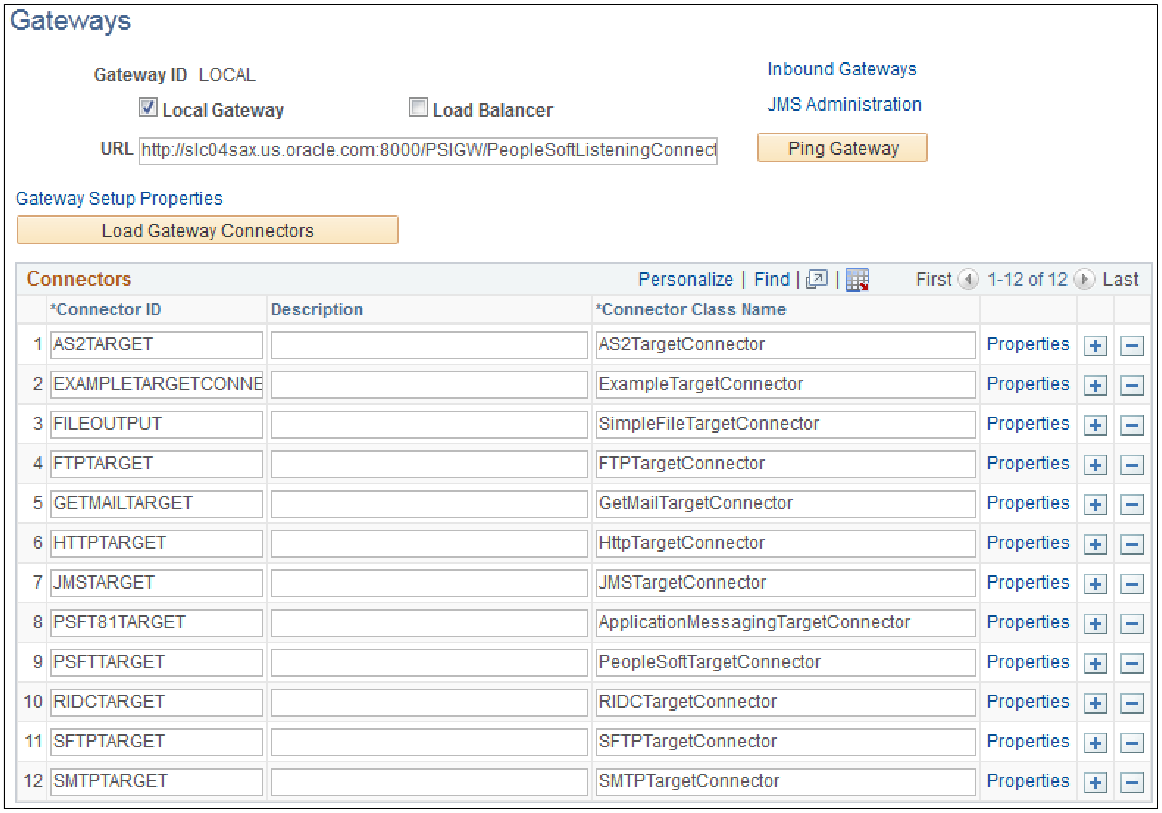
Configuring the Gateway

The Integration Gateway platform manages the actual receipt and delivery of messages passed between systems through the Integration Broker. Messages are received through listening connectors and are delivered from target connectors. The Gateway Manager is a dispatcher for messages that flow through the Integration Gateway.

To configure a gateway between your HCM and ELM databases so that they can communicate with each other:

1. Access the Gateways page for the LOCAL Gateway ID from the Integration Network Workcenter (**PeopleTools** > **Integration Broker** > **Integration Network Workcenter**

This example illustrates a gateway set up to communicate between HCM and ELM environments.



2. Specify the **URL** with the format *http://machinename:port/PSIGW/PeopleSoftListeningConnector*. The *machinename:port* is the machine name and port, host name, or IP address of the web server hosting the gateway.

3. Click the **Ping Gateway** button to confirm that it is active.

   This example illustrates the message that appears when you click the Ping Gateway button for an active gateway.

4. Click the **Load Gateway Connectors** button to have PeopleSoft Integration Broker examine the properties of all installed target connectors and load those properties into the gateway definition. All the connectors appear in the Connectors grid, and the properties of each connector are updated to reflect the current state.

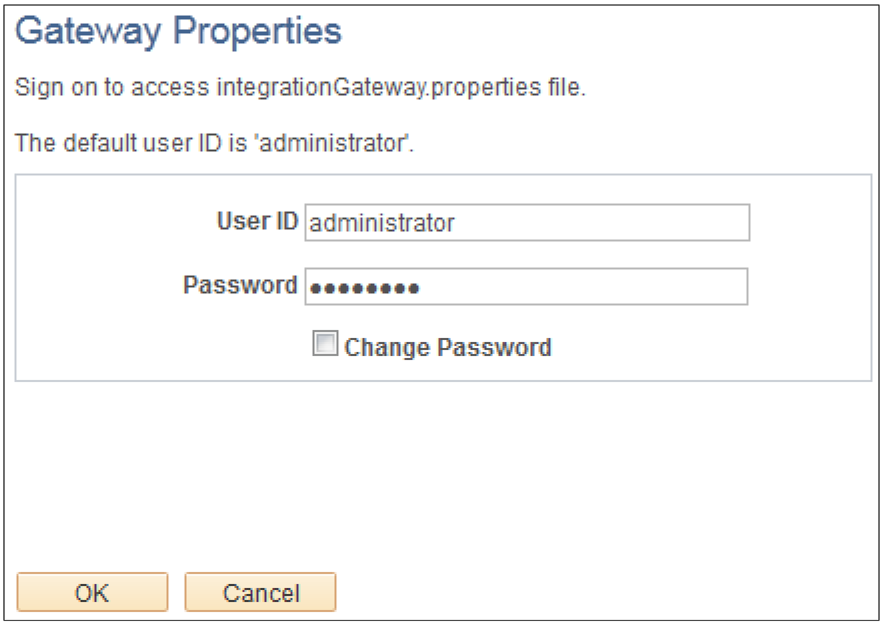
   The Connectors grid on the Gateways page lists the target connectors registered with the current gateway. Initially, none of the delivered connectors is loaded and the grid is empty. You can load target connectors automatically by clicking the Load Gateway Connectors button or by manually entering information in the grid.

Note: The Load Gateway Connectors button never overrides existing information. It adds only missing information, so it doesn't affect manually edited values. If you modified a connector, the button loads new and modified properties and does not interfere with existing properties.

Because communication is between PeopleSoft applications, it is important that the Connector ID for PSFTTARGET is listed in the Connectors grid.

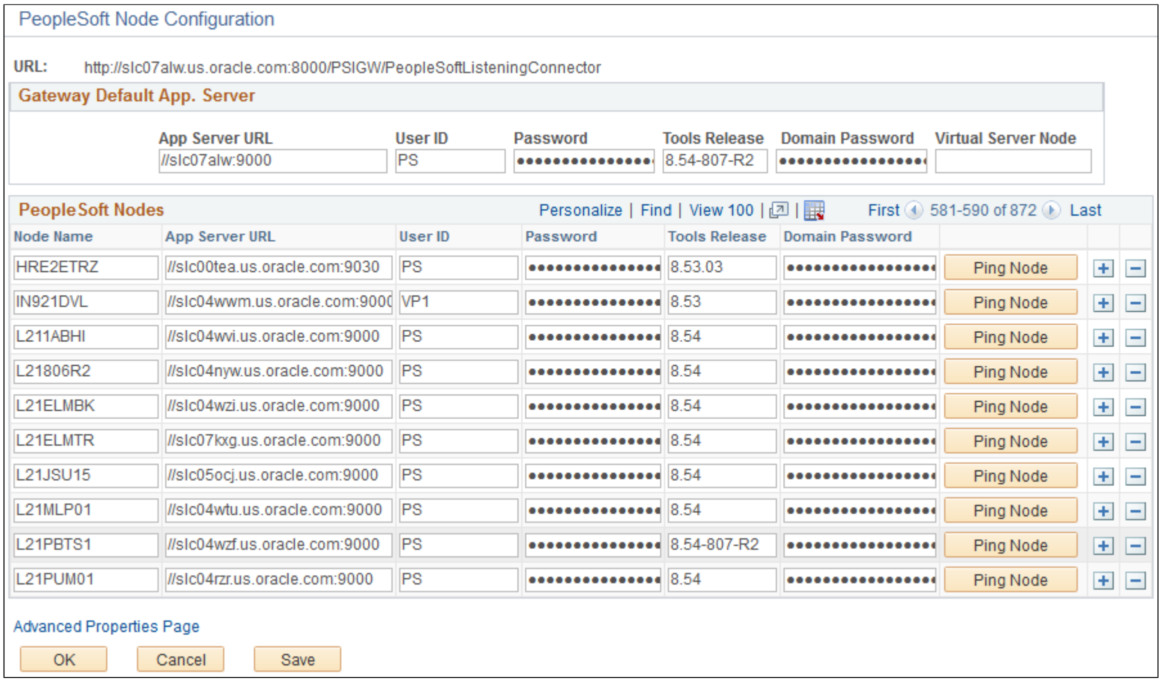
5. Click the Gateway Setup Properties link to access the Gateways Properties page.

   This example illustrates the fields and controls on the Gateway Properties page.

6. Enter a valid User ID and Password and click OK to access the PeopleSoft Node Configuration page.

This example illustrates the fields and controls on the PeopleSoft Node Configuration page.



The PeopleSoft Node Configuration page enables you to specify a Gateway Default Application Server and the local target nodes.

When the integration gateway receives an inbound message, it receives the name of the message and the target node for the message. If the message does not have a target node, the system uses the Gateway Default Application Server settings.

If the target node is specified for the message, however, then the system searches the PeopleSoft nodes specified for the gateway so that it can direct the message properly.

7. For the integration between PeopleSoft HCM and PeopleSoft ELM, you do not have to specify a Gateway Default Application Server. However, you do have to enter the HCM and ELM nodes that you created in the PeopleSoft node grids.

   This example illustrates how you might configure the local ELM node.

   This example illustrates how you might configure the remote HCM node.

Field or Control	***Description***
App Server URL (application server URL)	Enter the machine name and the Oracle Jolt port number. You can find the Jolt port number in the JOLTListener section of the psappsrv.cfg file or by using psadmin.exe to review the JSL port setting for the application server configuration.

Field or Control	***Description***
User ID and **Password**	Enter the User ID and Password that you specified when you created the application server domain. PeopleSoft Integration Broker automatically encrypts this password entry.
Tools Release	Enter the version number installed on the application server.

8. Click the Save button.

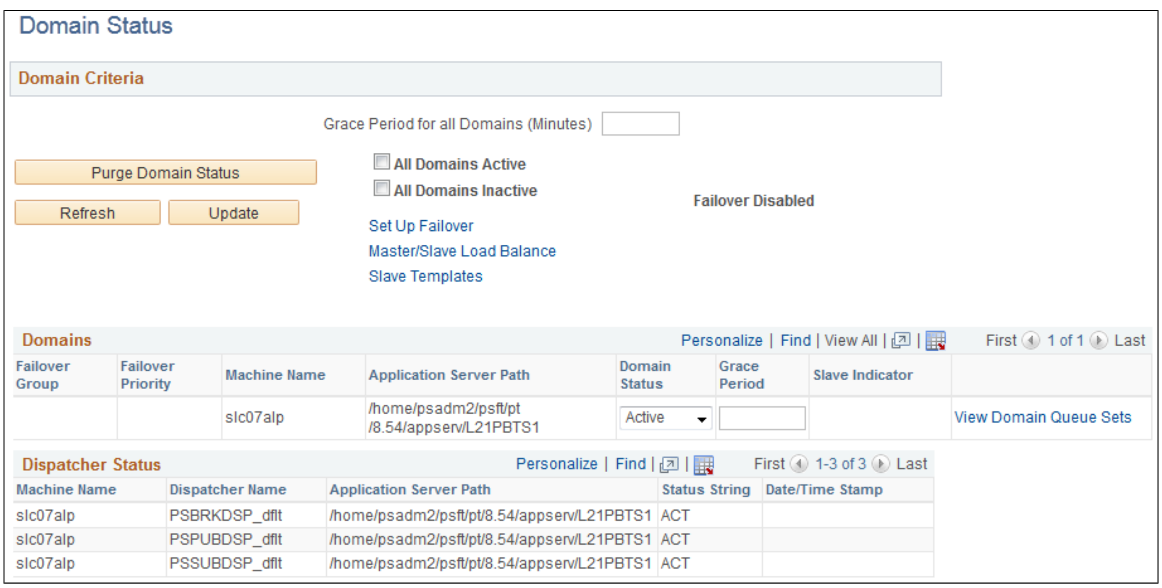
Note: After saving, if you click the Ping Node button for your local ELM node, the system should return a successful result. If your integration setup is not yet complete for your HCM environment, however, clicking the Ping Node button for your remote HCM node will return an authentication error.

Confirming Domain Activation

You must verify that the Integration Broker domain is active so that the integration between PeopleSoft HCM and PeopleSoft ELM can process.

Access the Domain Status page from the Integration Network Workcenter(**PeopleTools** > **Integration Broker** > **Integration Network Workcenter**)

This is an example of an active domain for an ELM environment.



The Domain Status page enables you to view the domains that have pub/sub servers on them that are running against the application database. You also use this page to set domain grace periods manually, allowing processing in a domain to finish before you pause the processing or take the domain offline.

Make sure that the **Domain Status** field is set to *Active* for the machine name listed in the Domains grid, and then click the **Update** button. This action activates the domain and when you click **Refresh**, you will see the Dispatcher Status update the Status String to *ACT* (Active).

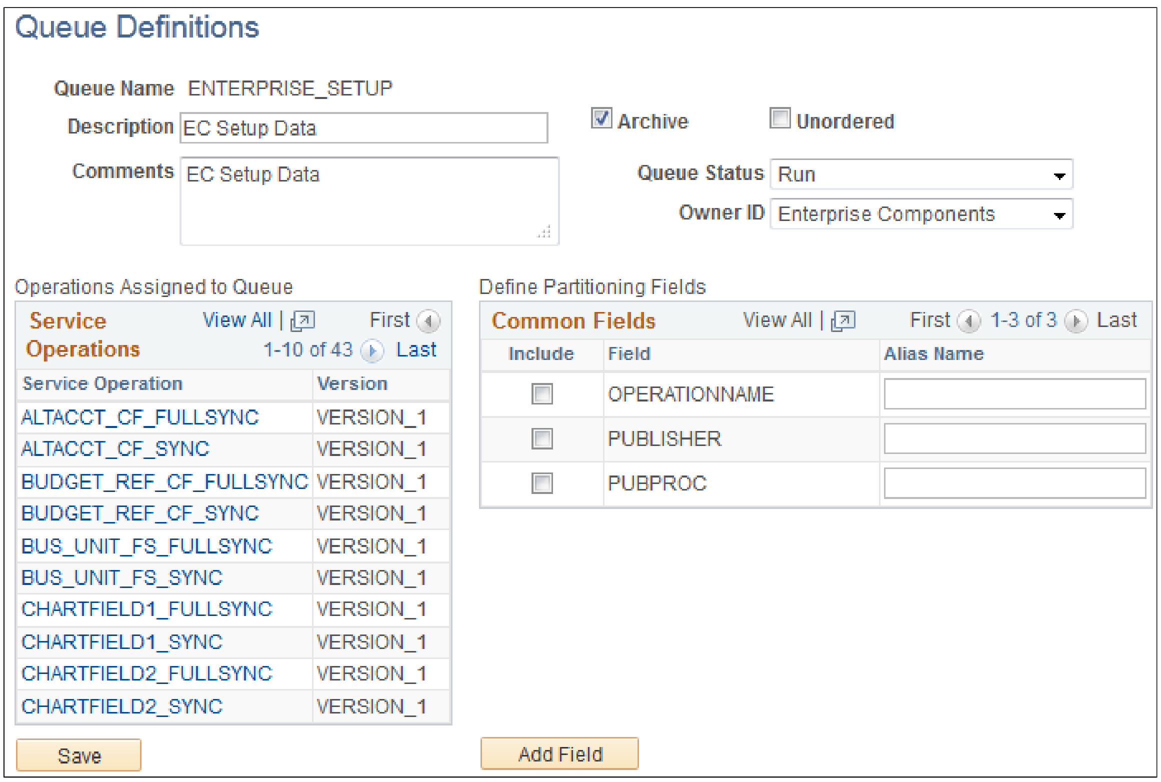
Confirming Queue Activation

For the full sync integration points in ELM Full Sync Integration Guided Process, the following integration broker queues must be active in your ELM environment:

- ENTERPRISE_SETUP
- TBLSET_CONTROL
- PERSON_SETUP
- HR_SETUP
- PERSON_DATA

To confirm that the queues are active, access the Queue Definitions page for each queue (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Queues**).

This example illustrates the fields and controls on the Queue Definitions page.



Make sure that the **Queue Status** field has a value of *Run* and click **Save**. Repeat these steps for each queue that needs to be active.

Activating Full Sync and Sync Integrations

Once you have set up the integration broker nodes, configured the gateways, and activated the domains, you are ready to activate the integration points between HCM and ELM.

To activate integration, use the Introspection and Deployment task in the Integration Network Workcenter. This task enables you to activate and deploy one or more integrations between the default local node (HCM) and a target node (ELM).

You can activate the following integration broker components:

- Local and remote service operations.
- Local and remote handlers.
- Local and remote routings.

The system uses Deployment Configuration to set up any transformation parameters required between HCM and ELM.

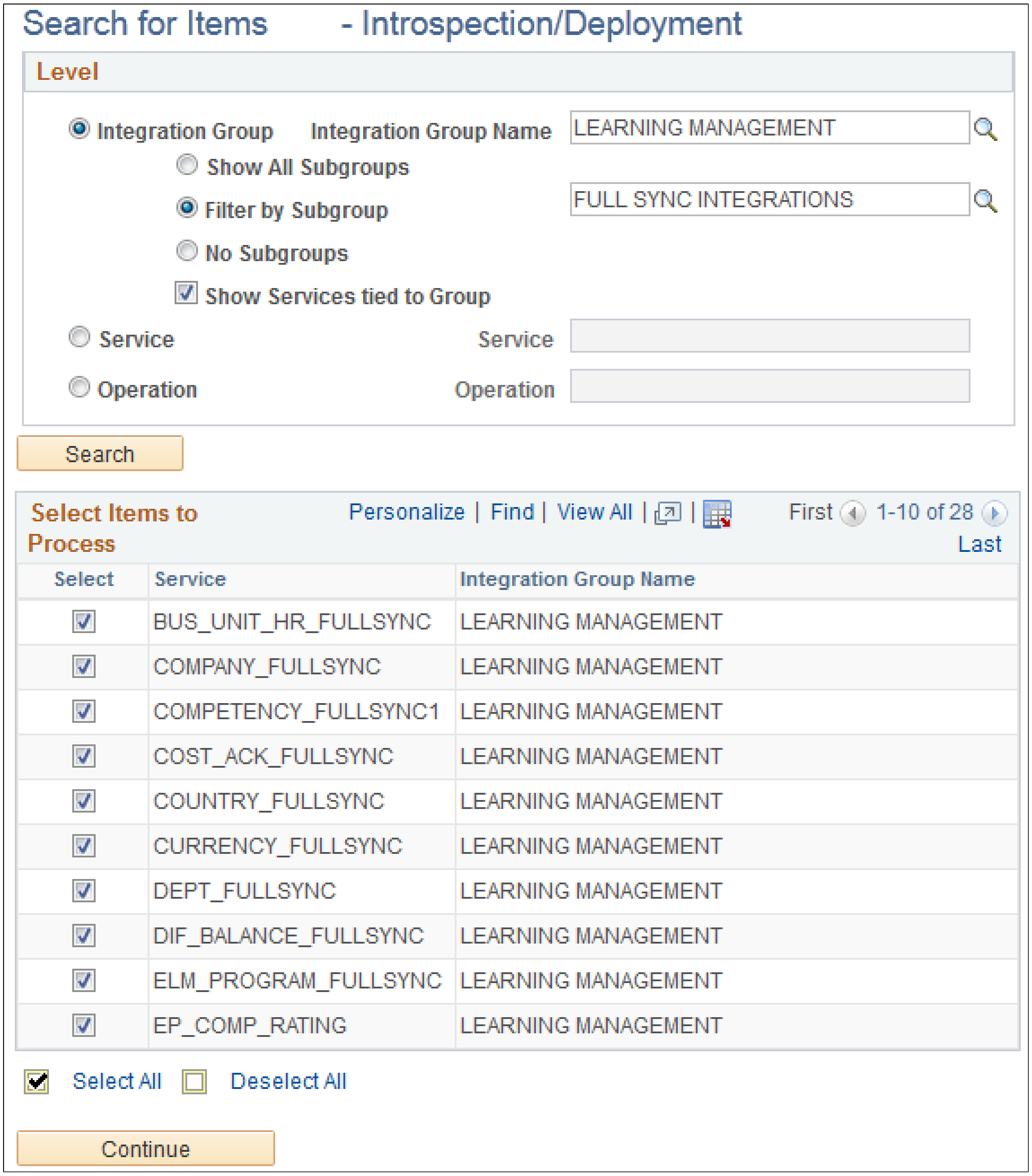
For more information on the Introspection and Deployment task, see the product documentation for *PeopleTools: Integration Broker Administration*.

Running Introspection and Deployment for the Full Sync Integrations of the Learning Management Integration Group

To perform Introspection and Deployment for the 12 required full sync services of the Learning Management integration group:

1. Click the Introspection and Deployment link in the Integration Network WorkCenter (**PeopleTools** > **Integration Broker** > **Integration Network WorkCenter**).
2. Enter *LEARNING MANAGEMENT* in the **Integration Group Name** field and *FULL SYNC INTEGRATIONS* in the **Filter by Subgroup** field.
3. Click Search.

This example illustrates the search results for the LEARNING MANAGEMENT integration group and FULL SYNC INTEGRATIONS subgroup.

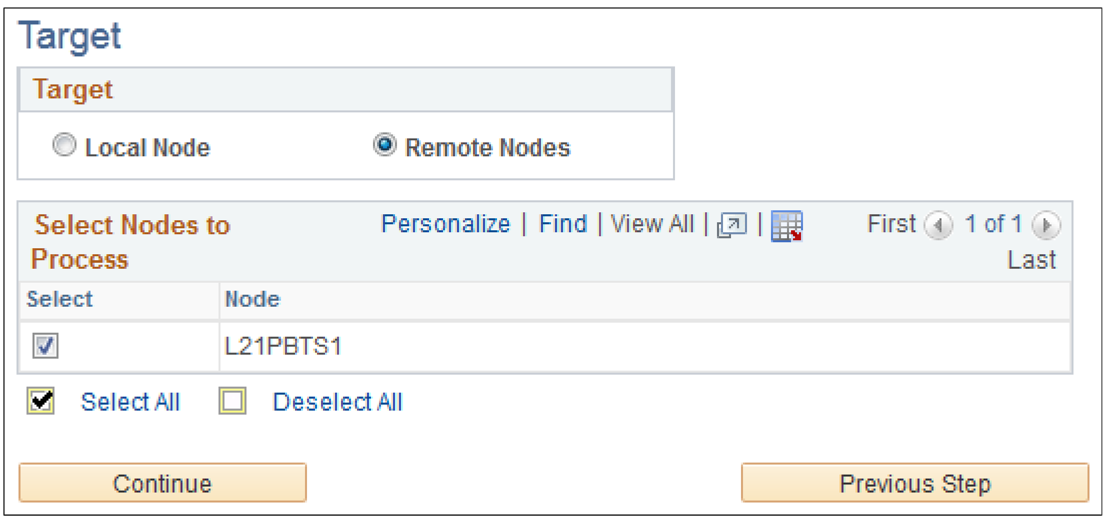


4. Click **View All** to see the entire list of search results.
5. Click **Deselect All** to clear all of the check boxes.
6. Select the check box next to the following 12 services:
   - BUS_UNIT_HR_FULLSYNC
   - COMPANY_FULLSYNC
   - COUNTRY_FULLSYNC

- CURRENCY_FULLSYNC
- DEPT_FULLSYNC
- JOBCODE_FULLSYNC
- PERSON_BASIC_FULLSYNC
- POI_TYPE_TBL_FULLSYNC
- POSITION_FULLSYNC
- SETID_INITIALIZE
- STATE_FULLSYNC
- WORKFORCE_FULLSYNC

7. Click **Continue**. The Target page appears.

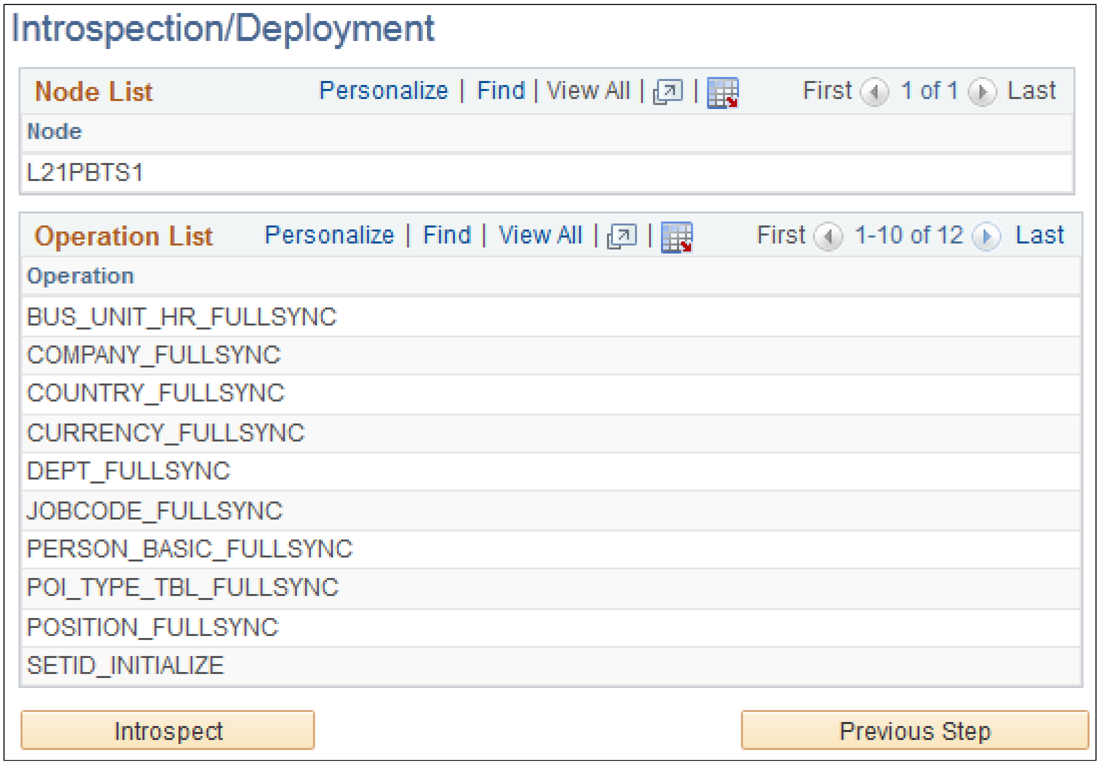
   This example illustrates the Target page with the remote ELM node selected.



   Make sure that the remote ELM node is selected.

8. Click **Continue** and confirm that your Node List and Operation List are correct.

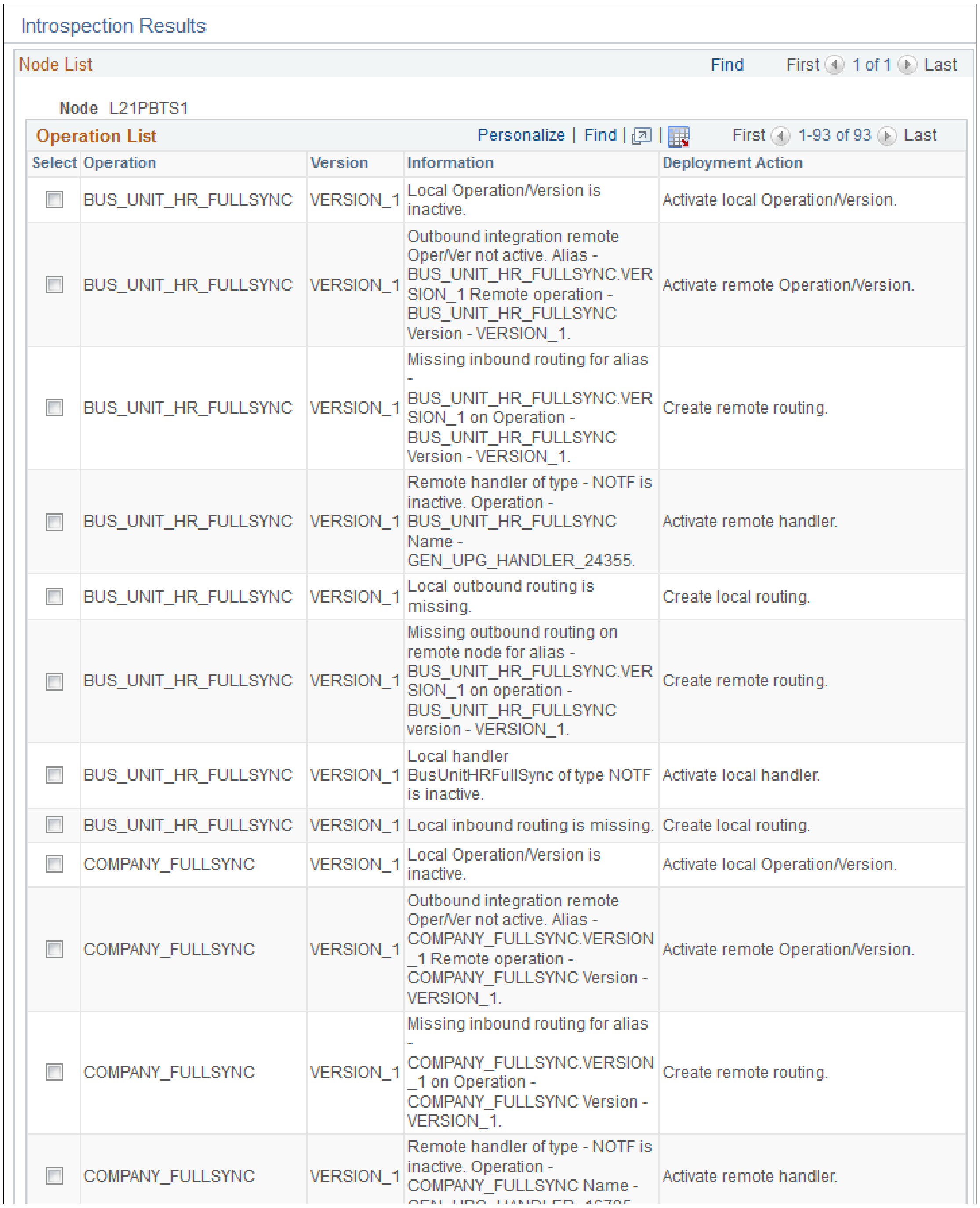
This is an example of what your Node List and Operation List might look like for Introspection and Deployment.



9. Click Introspect to generate a list of the integration broker setups that must be deployed. The system identifies whether service operations, handlers, and routings need to be activated.

   To ensure that routings are created with the appropriate transformation settings required for HCM and ELM integration, the system uses a Deployment Configuration table that contains information about how the integration routings need to be created and activated.

This is an example of the Introspection Results you should see prior to clicking the Deploy button.


Introspection Results

Node List Find First 1 of 1 Last

Node L21PBTS1

Operation List Personalize | Find | | First 1-93 of 93 Last

Select	Operation	Version	Information	Deployment Action
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Local Operation/Version is inactive.	Activate local Operation/Version.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Outbound integration remote Oper/Ver not active. Alias - BUS_UNIT_HR_FULLSYNC.VERSION_1 Remote operation - BUS_UNIT_HR_FULLSYNC Version - VERSION_1.	Activate remote Operation/Version.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Missing inbound routing for alias - BUS_UNIT_HR_FULLSYNC.VERSION_1 on Operation - BUS_UNIT_HR_FULLSYNC Version - VERSION_1.	Create remote routing.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Remote handler of type - NOTF is inactive. Operation - BUS_UNIT_HR_FULLSYNC Name - GEN_UPG_HANDLER_24355.	Activate remote handler.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Local outbound routing is missing.	Create local routing.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Missing outbound routing on remote node for alias - BUS_UNIT_HR_FULLSYNC.VERSION_1 on operation - BUS_UNIT_HR_FULLSYNC version - VERSION_1.	Create remote routing.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Local handler BusUnitHRFullSync of type NOTF is inactive.	Activate local handler.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Local inbound routing is missing.	Create local routing.
☐	COMPANY_FULLSYNC	VERSION_1	Local Operation/Version is inactive.	Activate local Operation/Version.
☐	COMPANY_FULLSYNC	VERSION_1	Outbound integration remote Oper/Ver not active. Alias - COMPANY_FULLSYNC.VERSION_1 Remote operation - COMPANY_FULLSYNC Version - VERSION_1.	Activate remote Operation/Version.
☐	COMPANY_FULLSYNC	VERSION_1	Missing inbound routing for alias - COMPANY_FULLSYNC.VERSION_1 on Operation - COMPANY_FULLSYNC Version - VERSION_1.	Create remote routing.
☐	COMPANY_FULLSYNC	VERSION_1	Remote handler of type - NOTF is inactive. Operation - COMPANY_FULLSYNC Name -	Activate remote handler.

10. Scroll to the bottom, click **Select All**, and click **Deploy**. The system should update the Information and Deployment Action columns of your Introspection Results to indicate that the operations were deployed successfully.

This is an example of the Introspection Results you should see after clicking the Deploy button.

Introspection Results

Node List Find First 1 of 1 Last

Node L21PBTS1

Operation List Personalize | Find | | First 1-93 of 93 Last

Select	Operation	Version	Information	Deployment Action
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Processed Successfully.	Operation - BUS_UNIT_HR_FULLSYNC Version - VERSION_1 has been activated.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Processed Successfully.	Operation - BUS_UNIT_HR_FULLSYNC Version - VERSION_1 has been activated.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Processed Successfully.	Inbound routing ~GENERATED~54722258 saved for Operation - BUS_UNIT_HR_FULLSYNC Version - VERSION_1.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Processed Successfully.	Activated handler - GEN_UPG_HANDLER_24355 of type - OnNotify.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Processed Successfully.	Outbound routing ~GENERATED~99418977 saved for Operation - BUS_UNIT_HR_FULLSYNC Version - VERSION_1.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Processed Successfully.	Outbound routing ~GENERATED~37436010 saved for Operation - BUS_UNIT_HR_FULLSYNC Version - VERSION_1.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Processed Successfully.	Activated handler - BusUnitHRFullSync of type - NOTF.
☐	BUS_UNIT_HR_FULLSYNC	VERSION_1	Processed Successfully.	Inbound routing ~GENERATED~10221495 saved for Operation - BUS_UNIT_HR_FULLSYNC Version - VERSION_1.
☐	COMPANY_FULLSYNC	VERSION_1	Processed Successfully.	Operation - COMPANY_FULLSYNC Version - VERSION_1 has been activated.
☐	COMPANY_FULLSYNC	VERSION_1	Processed Successfully.	Operation - COMPANY_FULLSYNC Version - VERSION_1 has been activated.
☐	COMPANY_FULLSYNC	VERSION_1	Processed Successfully.	Inbound routing ~GENERATED~82758756 saved for Operation - COMPANY_FULLSYNC Version - VERSION_1.
☐	COMPANY_FULLSYNC	VERSION_1	Processed Successfully.	Activated handler - GEN_UPG_HANDLER_16785 of type - OnNotify.
☐	COMPANY_FULLSYNC	VERSION_1	Processed Successfully.	Outbound routing ~GENERATED~102057263 saved for Operation - COMPANY_FULLSYNC Version - VERSION_1.
☐	COMPANY_FULLSYNC	VERSION_1	Processed Successfully.	Outbound routing ~GENERATED~99988070 saved for Operation - COMPANY_FULLSYNC Version - VERSION_1.

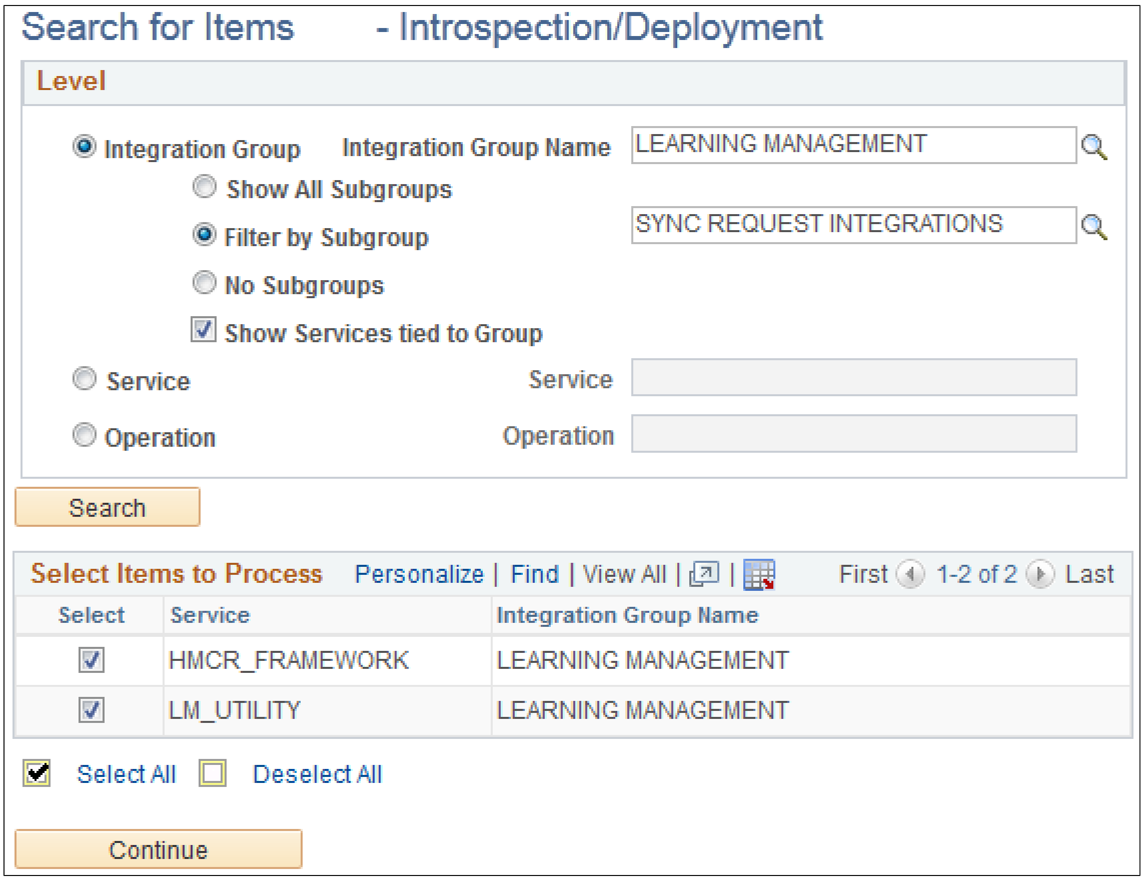
Running Introspection and Deployment for the Sync Integrations of the Learning Management Integration Group

The ELM Full Sync Integration Guided Process is dependent on two sync integration services (HMCR_FRAMEWORK and LM_UTILITY) that must be activated in order to communicate with the ELM application to:

- Initiate the Process Full Sync Data process, which loads data populated in ELM Staging tables to the final ELM table.
- Retrieve the process scheduler status of the Process Full Sync Data process. The system uses the process scheduler status to determine if Process Full Sync Data successfully completed.

Just as with the full sync integrations, to activate this sync integration, you use the Introspection and Deployment task in the Integration Network Workcenter. Use the same steps that you used to activate the full sync integrations, but search using the *LEARNING MANAGEMENT* integration group and the *SYNC REQUEST INTEGRATIONS* subgroup.

This is an example of the search parameters you should use to run the Introspection and Deployment task for the sync integrations.



Running Introspection and Deployment on the Employee Photo Integration Services

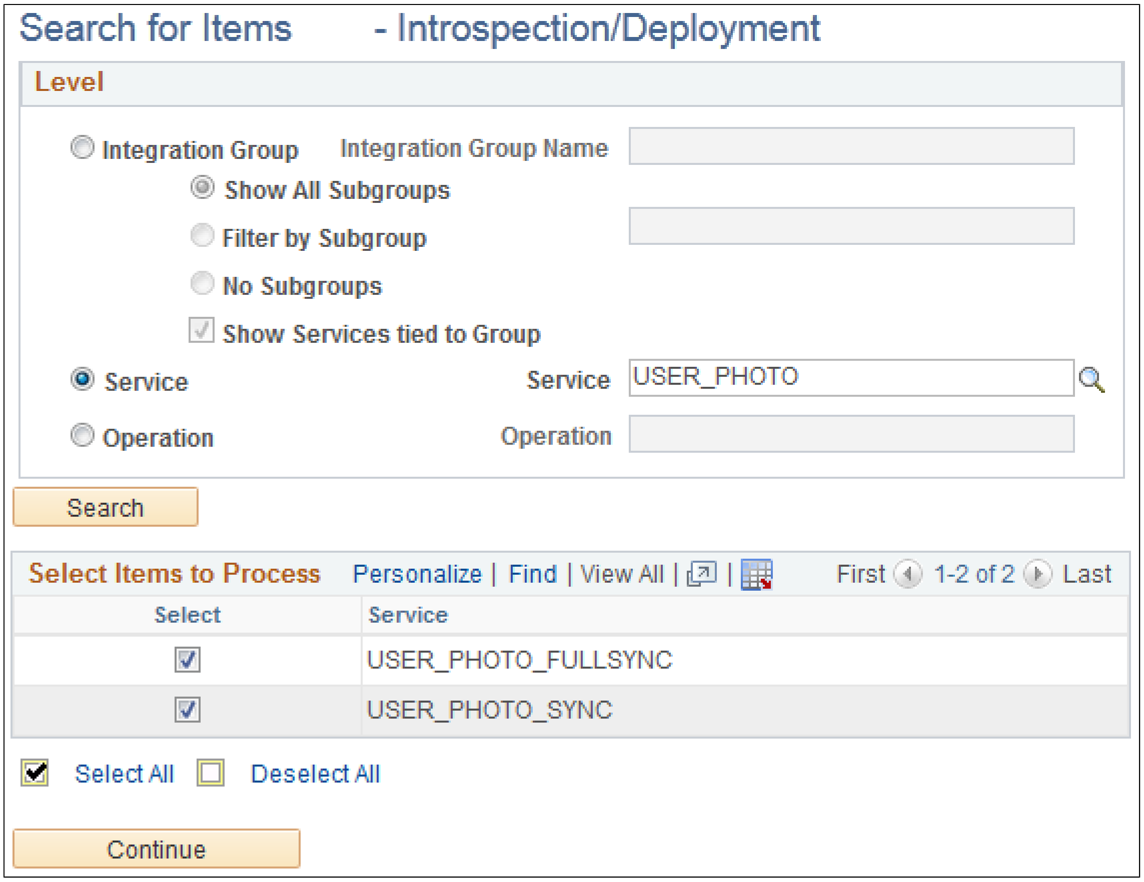
There are two services that you must deploy from your HCM environment to activate the Employee Photo Integration between HCM and ELM.

They are:

- USER_PHOTO_FULLSYNC
- USER_PHOTO_SYNC

You use the Introspection Deployment task just as you did with the Learning Management full sync and sync integrations, but you search using the Service field.

This is an example of how to search for the Employee Photo Integration services during the Introspection Deployment task.



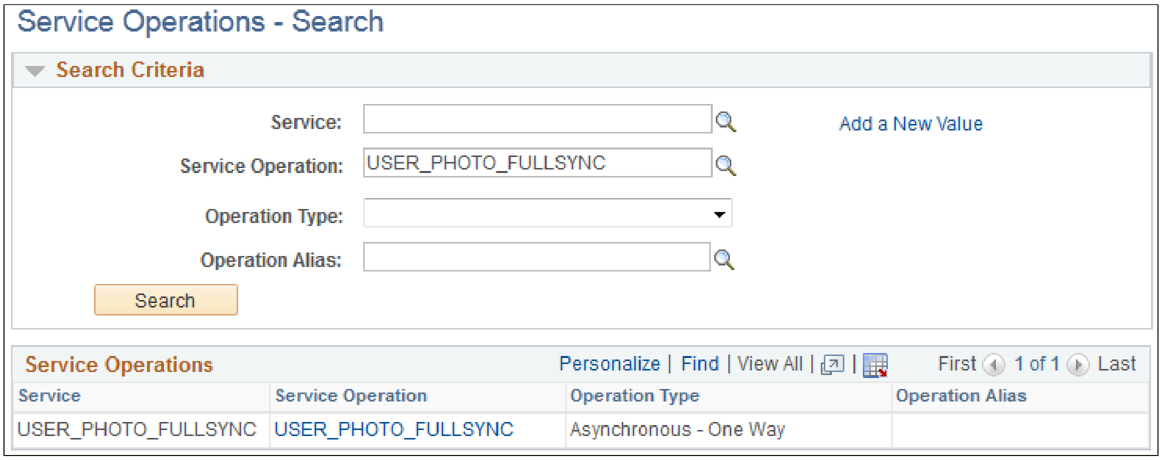
Verifying the Transformation Settings for Employee Photo Integration Routings in ELM

After you have deployed the USER_PHOTO_FULLSYNC and USER_PHOTO_SYNC service operations, you need to confirm that the inbound routings for those service operations have the correct transformation setup in your ELM environment. To verify the transformation setup of the inbound routings:

1. Access the Service Operations - Search page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**).

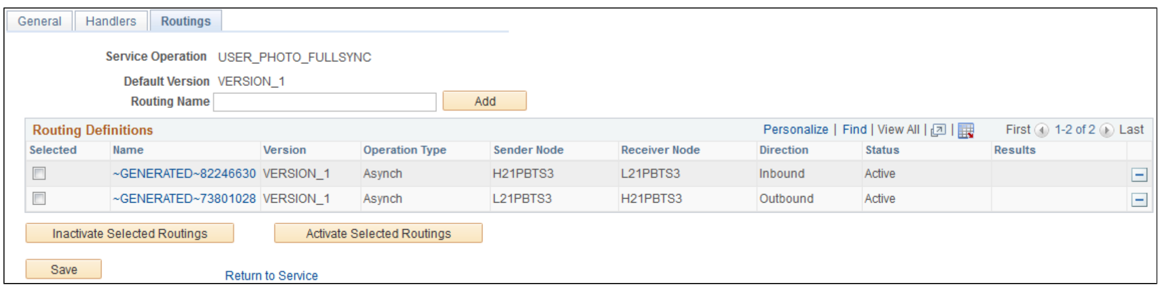
2. Search for the service operation you want to confirm using the **Service Operation** field.

This is an example of how to search for the USER_PHOTO_FULLSYNC service operation.



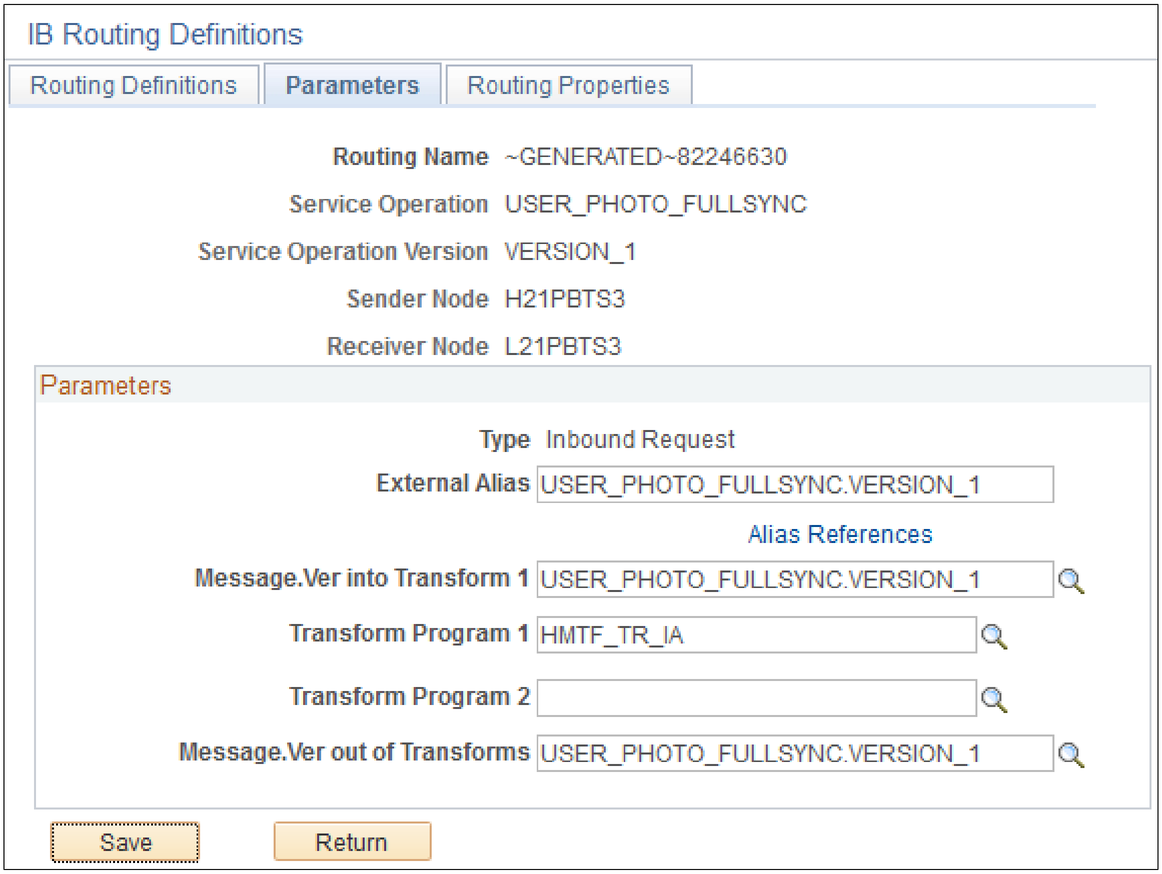
3. Click the Service Operation link to access the Service Operations component and access the Routings page.

   This is an example of the Routings page for the USER_PHOTO_FULLSYNC service operation.



4. Click the **Name** link for the generated inbound routing and access the IB Routing Definitions - Parameters page.

This is an example of the IB Routing Definitions - Parameters page with the correct transformation settings.



Make sure that this page is configured with the correct settings.

Field	***Value***
Message.Ver into Transform 1	*USER_PHOTO_FULLSYNC.VERSION_1*
Transform Program 1	*HMTF_TR_IA*
Message.Ver out of Transforms	*USER_PHOTO_FULLSYNC.VERSION_1*

Field	***Value***
Message.Ver into Transform 1	*USER_PHOTO_SYNC.VERSION_1*
Transform Program 1	*HMTF_TR_IA*
Message.Ver out of Transforms	*USER_PHOTO_SYNC.VERSION_1*

Setting Up Security

To be able to access the ELM Full Sync Integration Guided Process and initiate full sync integration between HCM and ELM, a user must be granted security access to certain components and integrations in HCM and ELM.

Note: The examples of security setup in this topic represent a user who has limited access for processing the integration between HCM and ELM using the ELM Full Sync Integration Guided Process.
For more information on security and user profiles, see the product documentation for *PeopleTools: Security Administration*.

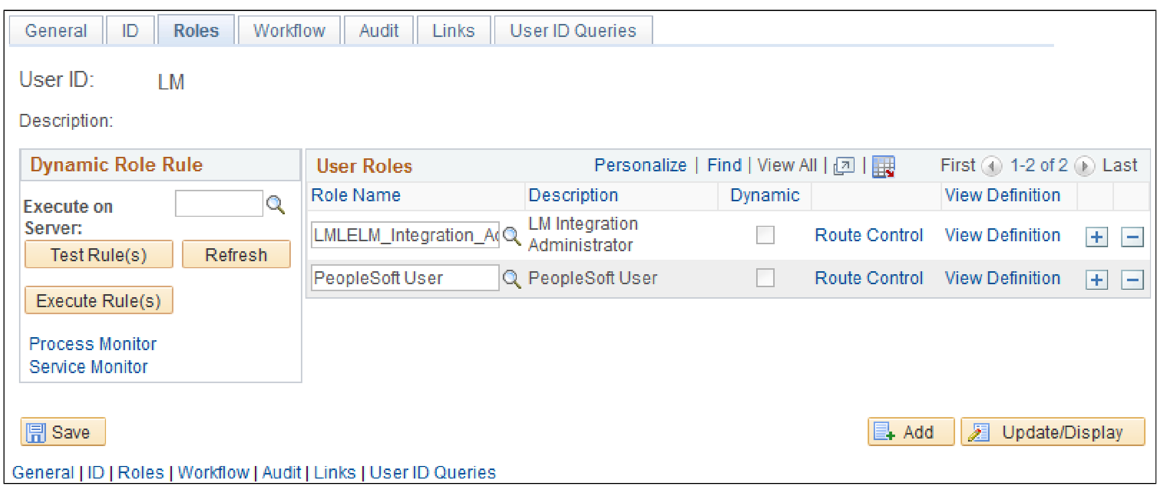
Updating Security in HCM

In HCM, you need to assign the user the LMLELM_Integration_Admin role, which is associated with the following permission lists:

- HCSPSERVICE - Standard Service security. This permission list grants access to process all integration delivered in the PeopleSoft HCM application.
- LMLELM800 - LM Integration Administrator. This permission list grants access to the ELM Full Sync Integration Guided process, including the pages that allow the user to select the guided process and initiate the full sync integration.
- PTPT4000 - PeopleSoft Integration Network. This permission list grants access to Integration Broker Network services that are used in the ELM Full Sync Integration Guided Process.

To assign the LMLELM_Integration_Admin role in HCM, access the User Profiles - Roles page (**PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **Roles**

This example illustrates a user with the required roles in the HCM environment.



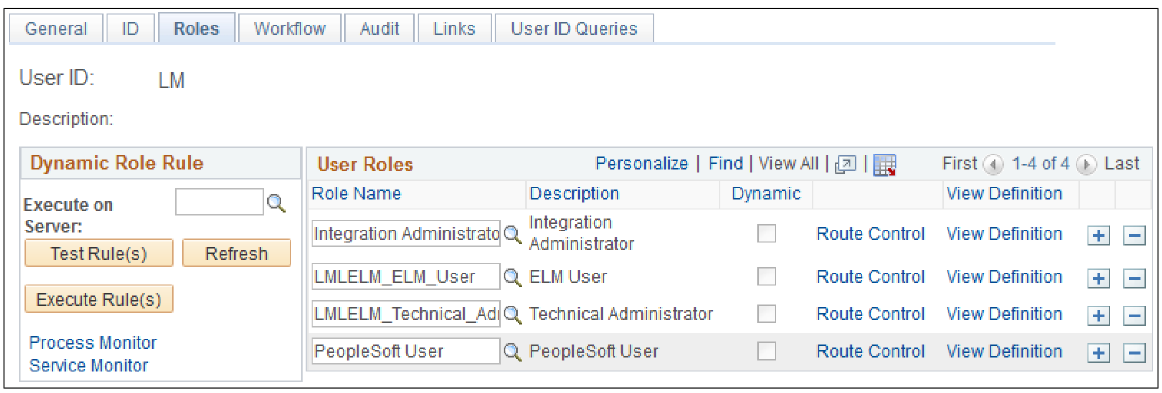
Updating Security in ELM

In ELM, you need to assign to the user the following delivered roles that grant access to process integration and the ability to initiate the Process Full Sync Data process:

- Integration Administrator. This role is associated with the PTPT4000 permission list for the PeopleSoft Integration Network. This permission list grants access to Integration Broker Network services that are used in the ELM Full Sync Integration Guided Process.
- LMLELM_Technical Administrator. This role is associated to two permission lists:
  - HCSPSERVICE - Standard Service security. This permission list grants access to process all integration delivered in the PeopleSoft HCM application.
  - LMLELM540 - ELM Utilities. This permission lists grants access to standard utilities in ELM.
- LMLELM_ELM_User. This role is associated with multiple permission lists that grant access to standard components, component interfaces, and other objects required for an ELM user.
- PeopleSoft User. This role is associated with multiple permission lists that grant access to specific PeopleSoft components for a standard user.

To assign the required roles in ELM, access the User Profiles - Roles page (**PeopleTools** > **Security** > **User Profiles** > **User Profiles** > **Roles**

This example illustrates a user with the required roles in the HCM environment.



Defining the Remote System

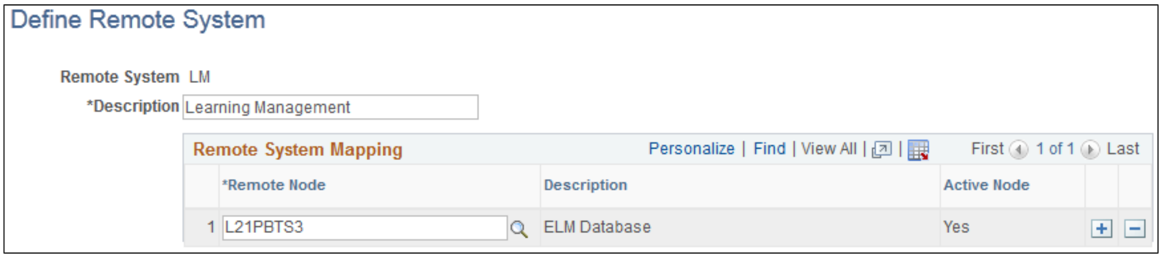
The ELM Full Sync Integration Guided Process uses two components to initiate and monitor an integration request containing one or more full sync integrations. These new components are part of an HCM framework called Integration Process Request.

The Integration Process Request framework has a setup table that contains specific information about how integrations need to be processed when included in an integration process request. For example, when initiating certain integrations between HCM and ELM, the data first goes to a staging table and another process in ELM is required to be executed. The setup table in the Integration Process Request framework has information about this additional step that must be executed in the ELM application to complete the processing of the integration.

To ensure that these additional steps are loaded into an integration process request, you must configured the Integration Process Request Remote System table. This table stores a mapping between a Remote System ID and the Message Node that represents that remote system.

To define your remote system in HCM, access the Define Remote System page (**Set Up HCM** > **Common Definitions** > **Integration Process** > **Define Remote System**).

This example illustrates the Define Remote System page for the Learning Management remote system.



Note: To access this setup table, the user must be assigned the Integration Process Admin role.

Running the ELM Full Sync Integration Guided Process

After configuring the HCM and ELM environments for Integration Broker, activating sync integrations, assigning user security to users in HCM and ELM, and the defining your remote system, you are now ready to run the ELM Full Sync Integration Guided Process.

For more information on guided processes, see the product documentation for *PeopleSoft HCM: Application Fundamentals*.

Pages Used to Run the ELM Full Sync Integration Guided Process

Page Name	***Definition Name***	***Usage***
Select Guided Process Page	GDP_SELECT_PRCS	Select the guided process you want to run and answer the guided process questionnaire.
Overview Page	GDP_INFO	Review information about the full sync integration process that you want to initiate
Create Integration Process Request Page	IPR_CREATE_REQUEST	Submit a request for a full sync integration process.
Review Integration Process Request Page	IPR_REVIEW_REQUEST	Monitor the progress of a full sync integration process.

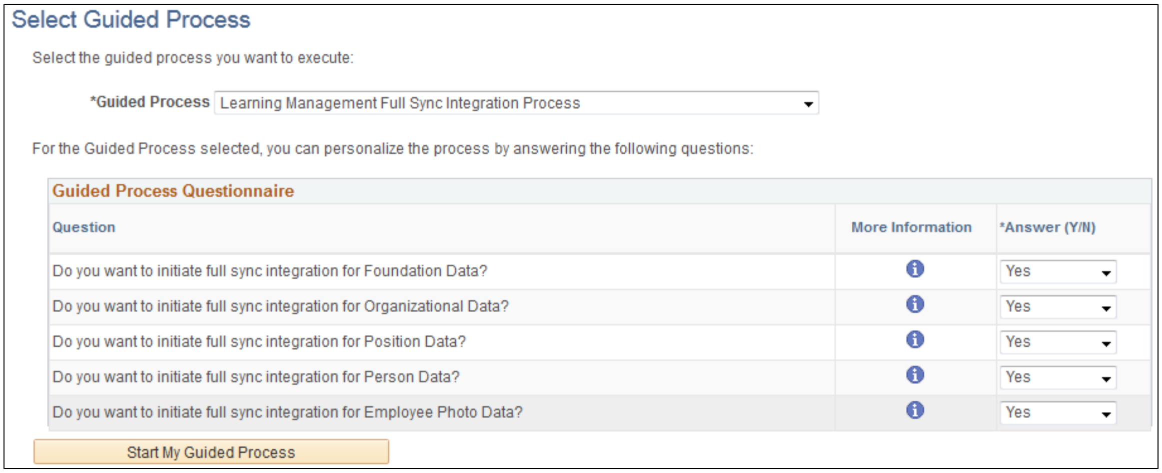
Select Guided Process Page

Use the Select Guided Process page (GDP_SELECT_PRCS) to select the guided process you want to run and answer the guided process questionnaire.

Navigation:

Set Up HCM > **Common Definitions** > **Guided Process** > **Select Guided Process**

This example illustrates the fields and controls on the Select Guided Process page.



Field or Control	***Description***
Guided Process	Select *Learning Management Full Sync Integration Process*.

Guided Process Questionnaire

The guided process questionnaire enables you to personalize the process of running full sync integration by allowing you to select the full sync integrations that you want to process. Select Yes in the Answer column for each full sync integration that you want to include in the steps of the guided process.

Field or Control	***Description***
	Click for more details if you are unsure about the effect of selecting *Yes* for a question.
Start My Guided Process	Click to access the Guided Process Workcenter where you can view and process the steps of the guided process.
Continue My Guided Process	If you have already started your guided process, this button appears in place of the Start My Guided Process button. Click it to continue your guided process where you left off.
Delete Guided Process	This button appears only if you have already started a guided process. Click it to delete the current guided process.

Understanding the Guided Process Workcenter

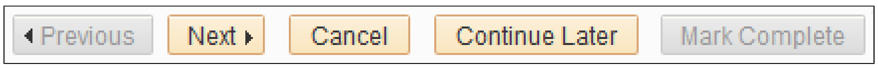
The Guided Process Workcenter has three areas:

- Navigation subpage
- Pagelet
- Target content

Navigation Subpage Area

In the navigation subpage area, you can access navigational buttons that will take you through the steps of the guided process.

This is an example of the navigation subpage area of the Guided Process Workcenter.

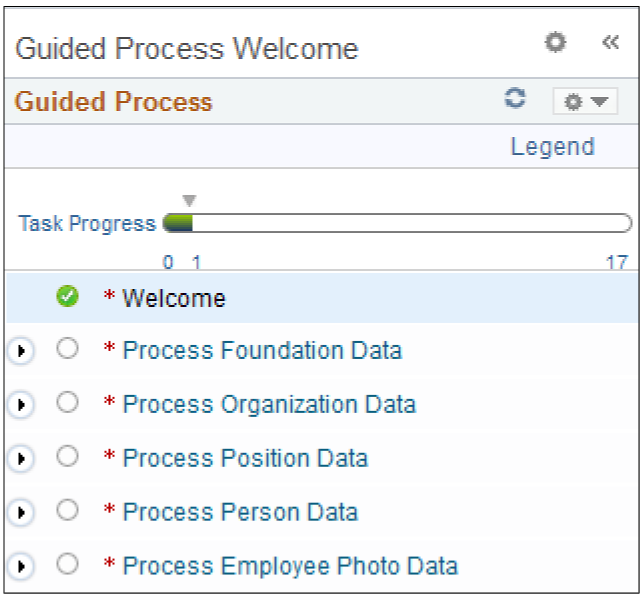


Term	***Definition***
Previous	Click to move to the previous step in the guided process.
Next	Click to move to the next step in the guided process.
Mark Complete	Click to mark a step as manually completed. It is necessary only for pages that contain nothing to save, such as the Overview page. Once you finish reading the text on pages that require no input or saving, you can click the Mark Complete button to proceed.
Cancel	Click to delete the current instance of the Learning Management Full Sync Integration Process and return to the Select Guided Process page. Deleting the current instance of the Learning Management Full Sync Integration Process does not affect any of the full sync integration processes that have completed or are in progress. It is not recommended, however, that you delete the current instance while full sync integration is processing. This is because once the current instance is deleted, you cannot review the status of the full sync integration that is processing.

Term	*Definition*
Exit	Click to exit the current instance of the Learning Management Full Sync Integration Process and return to the Select Guided Process page. You can return to the current instance of the Learning Management Full Sync Integration by selecting the guided process again.

Pagelet Area

This is an example of the pagelet area of the Guided Process Workcenter.



The pagelet area displays a high-level section for each guided process question to which you answered *Yes* on the Select Guided Process page. You can expand each section to view the individual steps of each process.

Each section has three steps:

1. Overview
2. Create Integration Request

   This initiates a request to process a full sync integration.
3. Monitor Integration Request

   This step enables you to monitor the progress of a full sync integration process.

Note: The Process Employee Photo Data section also includes an extra informational step that reminds you to verify the installation settings in your ELM environment.

Target Content Area

This is an example of the target content area of the Guided Process Workcenter.

The target content area is the primary area where you review information and initiate and monitor the full sync integrations.

When you first access the Guided Process Workcenter, you start at the Welcome page, which provides an overview of the guided process. From here you can navigate in multiple ways within the Guided Process Workcenter. You can interact directly with the steps in the pagelet area by expanding sections and clicking directly on the steps or you can use the **Next** and **Previous** buttons that appear in the navigation subpage area.

Understanding the Guided Process Workcenter

The Guided Process Workcenter has three areas:

- Navigation subpage
- Pagelet
- Target content

Navigation Subpage Area

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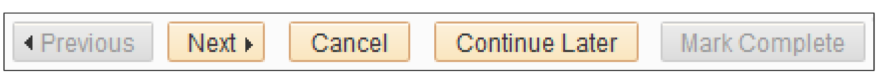
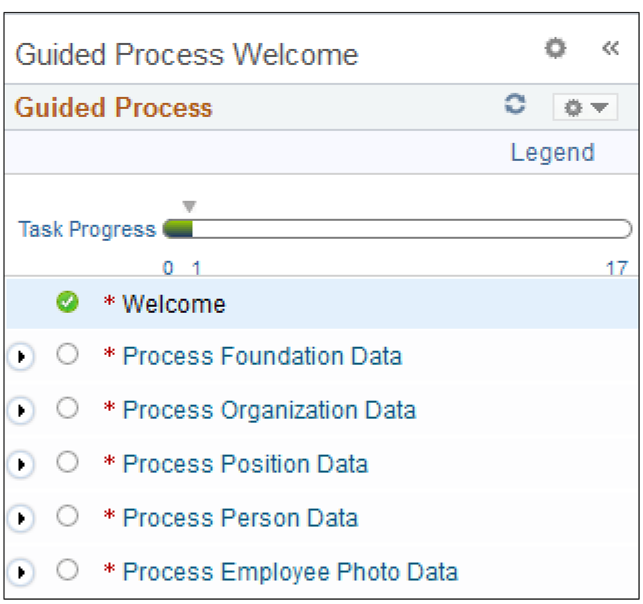


Term	***Definition***
Previous	Click to move to the previous step in the guided process.
Next	Click to move to the next step in the guided process.

Term	*Definition*
Mark Complete	Click to mark a step as manually completed. It is necessary only for pages that contain nothing to save, such as the Overview page. Once you finish reading the text on pages that require no input or saving, you can click the Mark Complete button to proceed.
Cancel	Click to delete the current instance of the Learning Management Full Sync Integration Process and return to the Select Guided Process page. Deleting the current instance of the Learning Management Full Sync Integration Process does not affect any of the full sync integration processes that have completed or are in progress. It is not recommended, however, that you delete the current instance while full sync integration is processing. This is because once the current instance is deleted, you cannot review the status of the full sync integration that is processing.
Exit	Click to exit the current instance of the Learning Management Full Sync Integration Process and return to the Select Guided Process page. You can return to the current instance of the Learning Management Full Sync Integration by selecting the guided process again.

Pagelet Area

This is an example of the pagelet area of the Guided Process Workcenter.



The pagelet area displays a high-level section for each guided process question to which you answered *Yes* on the Select Guided Process page. You can expand each section to view the individual steps of each process.

Each section has three steps:

1. Overview
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   This initiates a request to process a full sync integration.
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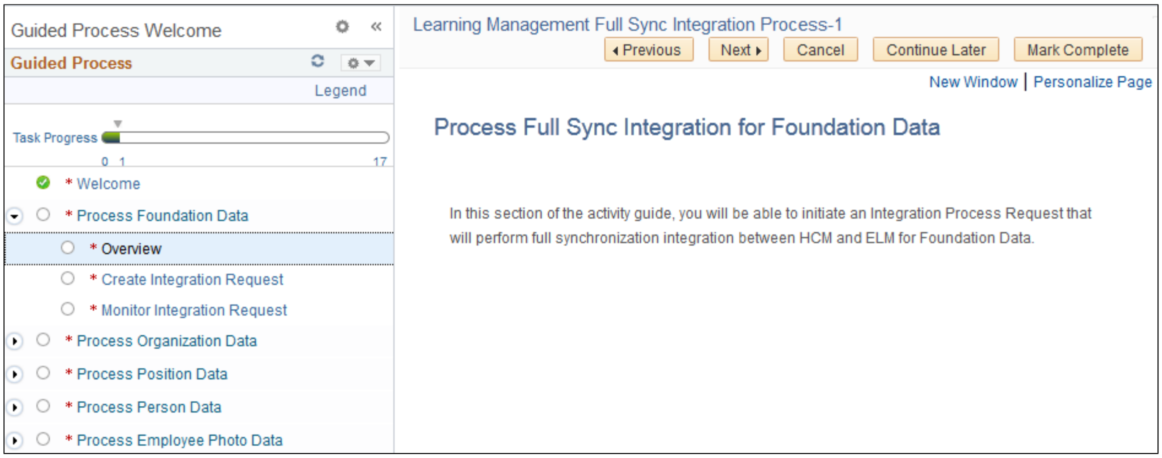
Overview Page

Use the Overview page (GDP_INFO) to review information about the full sync integration process that you want to initiate.

Navigation:

Click the **Next** or **Previous** button in the navigation subpage, or select an Overview step of a full sync integration in the pagelet area of the Guided Process Workcenter.

This example illustrates an Overview page for a full sync integration process.

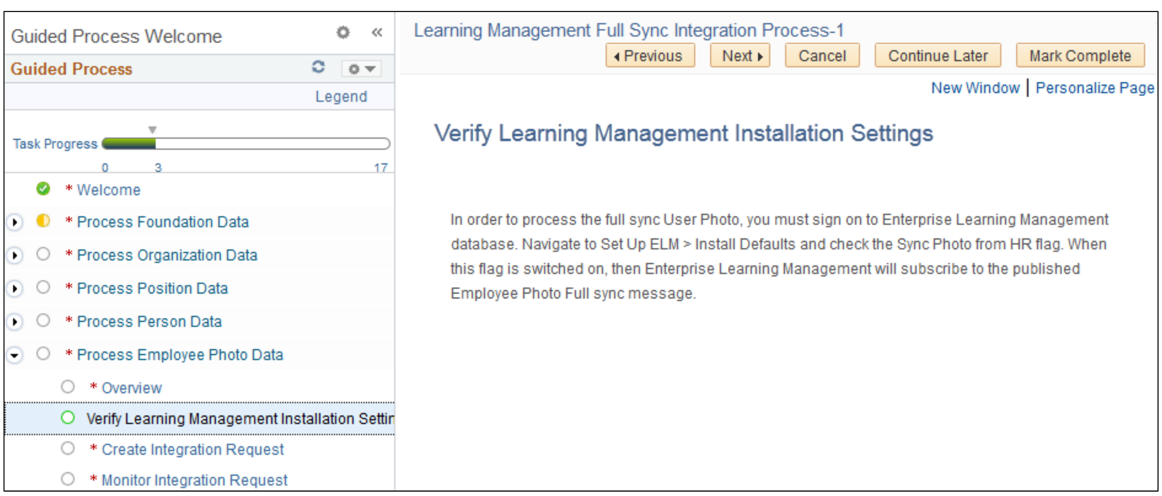


Because there is nothing to be saved on this page, you can click the Mark Complete button to update the status of this step. This action updates the status of the section to *In Progress*, and the number of tasks completed is reflected in the Task Progress bar.

Verify Learning Management Installation Settings

The Process Employee Photo Data full sync integration has an additional informational step following the Overview: Verify Learning Management Installation Settings. Once you have read the information for this step and verified the installation settings in your ELM environment as instructed, you can mark this step as complete just as you would with the Overview steps.

This example illustrates the Verify Learning Management Installation Settings step of the Process Employee Photo Data full sync integration.



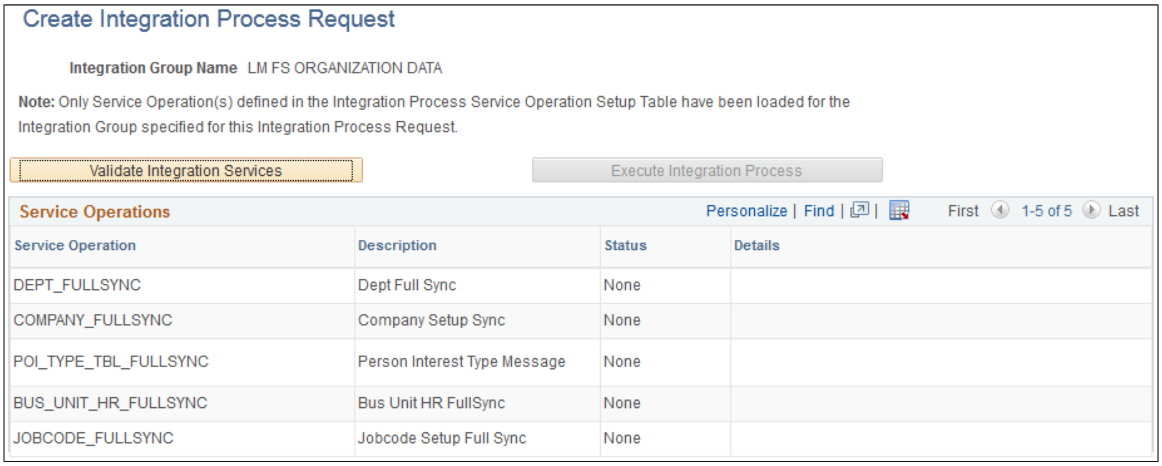
Create Integration Process Request Page

Use the Create Integration Process Request page (IPR_CREATE_REQUEST) to submit a request for a full sync integration process.

Navigation:

Click the **Next** or **Previous** button in the navigation subpage, or select a Create Integration Request step of a full sync integration in the pagelet area of the Guided Process Workcenter.

This example illustrates the fields and controls on the Create Integration Process Request page.


Create Integration Process Request

Integration Group Name LM FS ORGANIZATION DATA

Note: Only Service Operation(s) defined in the Integration Process Service Operation Setup Table have been loaded for the Integration Group specified for this Integration Process Request.

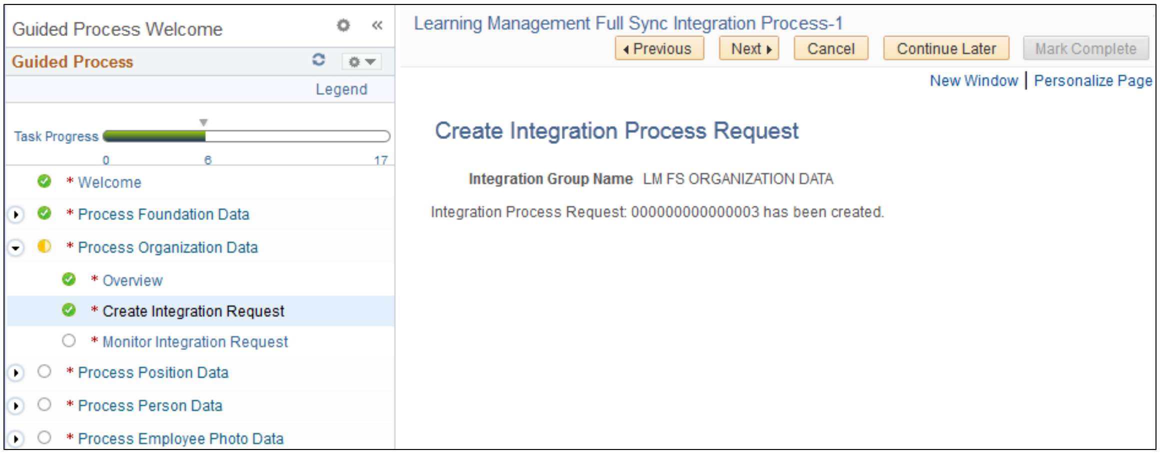
Validate Integration Services   Execute Integration Process

Service Operations   Personalize | Find | First 1-5 of 5 Last

Service Operation	Description	Status	Details
DEPT_FULLSYNC	Dept Full Sync	None	
COMPANY_FULLSYNC	Company Setup Sync	None	
POI_TYPE_TBL_FULLSYNC	Person Interest Type Message	None	
BUS_UNIT_HR_FULLSYNC	Bus Unit HR FullSync	None	
JOBCODE_FULLSYNC	Jobcode Setup Full Sync	None	

Field or Control	***Description***
Integration Group Name	Displays the group name of the full sync integration for which you are creating a process request.
Validate Integration Services	Click to validate that all the service operations associated with this full sync integration are active and configured. This should update the **Status** of each service operation to *Valid*. If any of the service operations are not valid, you must contact a system administrator to review the integration configuration before you can proceed.
Execute Integration Process	This button is available only after you successfully validate all the service operations associated with the full sync integration. Click it to create the integration process request, which initiates the full sync integration. When you click this button, the page displays the process request ID.

This is an example of the Create Integration Process Request page after the process request has been executed.



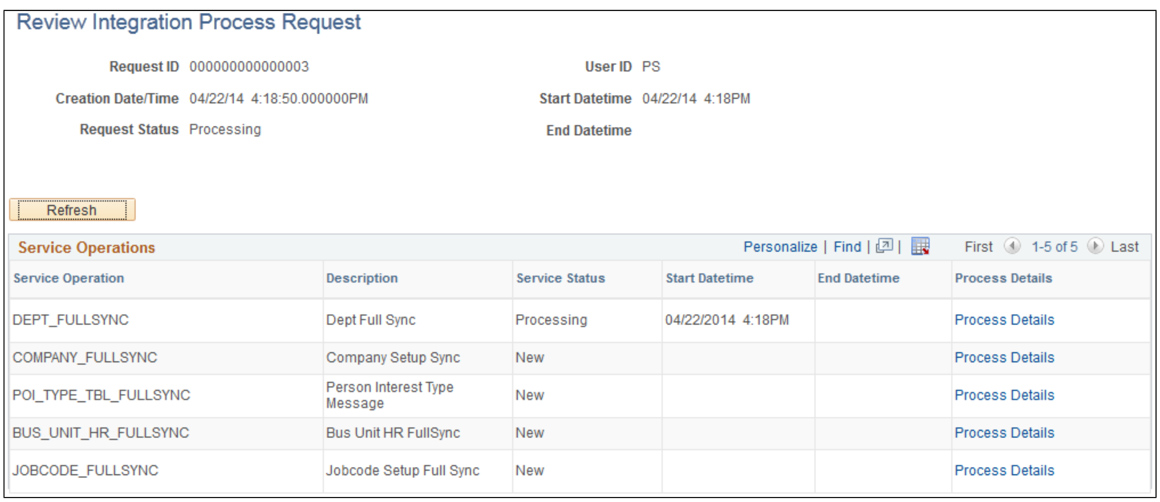
Review Integration Process Request Page

Use the Review Integration Process Request page to monitor the progress of a full sync integration process.

Navigation:

Click the **Next** or **Previous** button in the navigation subpage, or select a Monitor Integration Request step of a full sync integration in the pagelet area of the Guided Process Workcenter.

This example illustrates the fields and controls on the Review Integration Process Request page.



Field or Control	***Description***
Refresh	Click to update the page with the current status of the integration process.

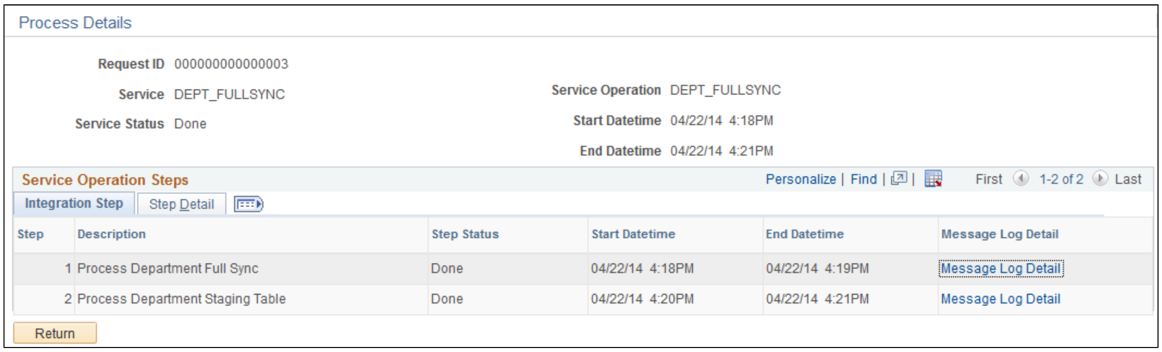
Field or Control	***Description***
Service Status	Displays the status of each service operation associated with the integration. Values are: • *New:* The service operation has not yet been processed. • *Processing:* The service operation is currently in process. • *Done:* All the integration steps for the service operation are complete. • *Cancelled:* The system encountered an error with the service operation and cancelled it. If the system cancels a service operation, it cancels all subsequent service operations and sets the status of the entire integration request to *Cancelled*.
Process Details	Click to access the Process Details page, where you can view more information about the processing of each integration step for a service operation.

This page displays information for one or more integration steps, depending on the service operation.

Field or Control	***Description***
Step Status	Displays the current status for each integration step. Values are: • *New:* The step for the service operation has not yet been processed. • *Processing:* The step for the service operation is currently in process. • *Done:* The step for the service operation has completed. • *Cancelled:* The system encountered an error with the step and cancelled it. If the system cancels a step, it cancels all subsequent service operations and steps and sets the status of the entire integration request to *Cancelled*.
Message Log Detail	Click to access the Message Log Details page where you can review any messages generated for an integration step.

Process Details Page

This example illustrates the fields and controls on the Process Details page.



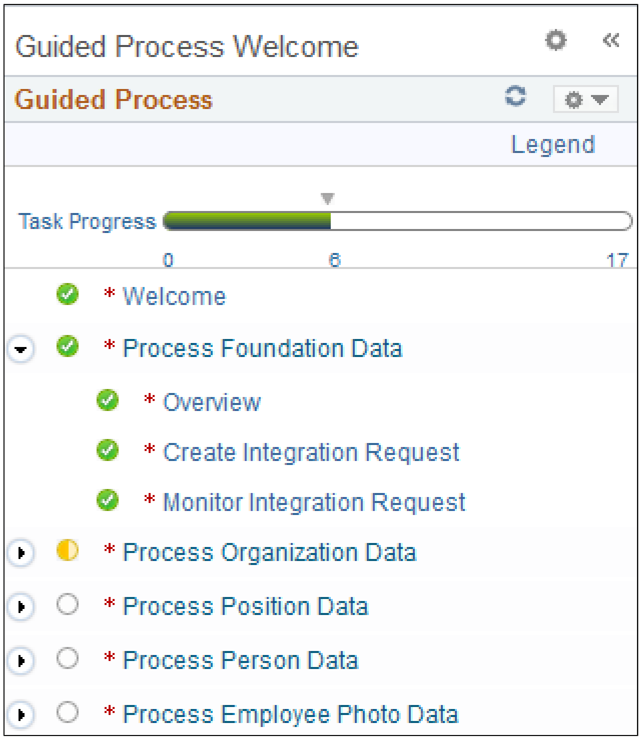
Message Log Details Page

This is an example of the Message Log Details page for an integration step.

Completing an Integration Request

Once all the service operations for an integration have a status of *Done,* you can click the Mark Complete button in the navigation subpage area. This sets the Monitor Integration Request step and the entire section of the guided process to *Complete* in the pagelet area of the Guided Process Workcenter.

This is an example of the pagelet area showing a full sync integration that has been marked as complete.



Activating Incremental Sync Integration

When you have successfully processed all of the full sync integrations between HCM and ELM, you are ready to activate the incremental sync integration points between HCM and ELM.

Note: This topic specifically covers the activation of incremental sync integration for the full sync integrations included in the ELM Full Sync Integration Guided Process. You can follow the same steps, however, to activate other incremental sync integrations between HCM and ELM.

To activate incremental sync integration, you use the Introspection and Deployment task in the Integration Network Workcenter. This task enables you to activate and deploy one or more integrations between the default local node (HCM) and a target node (ELM).

For more information on the Introspection and Deployment task, see the product documentation for *PeopleTools: Integration Broker Administration*.

Running Introspection and Deployment for the Incremental Sync Integrations of the Learning Management Integration Group

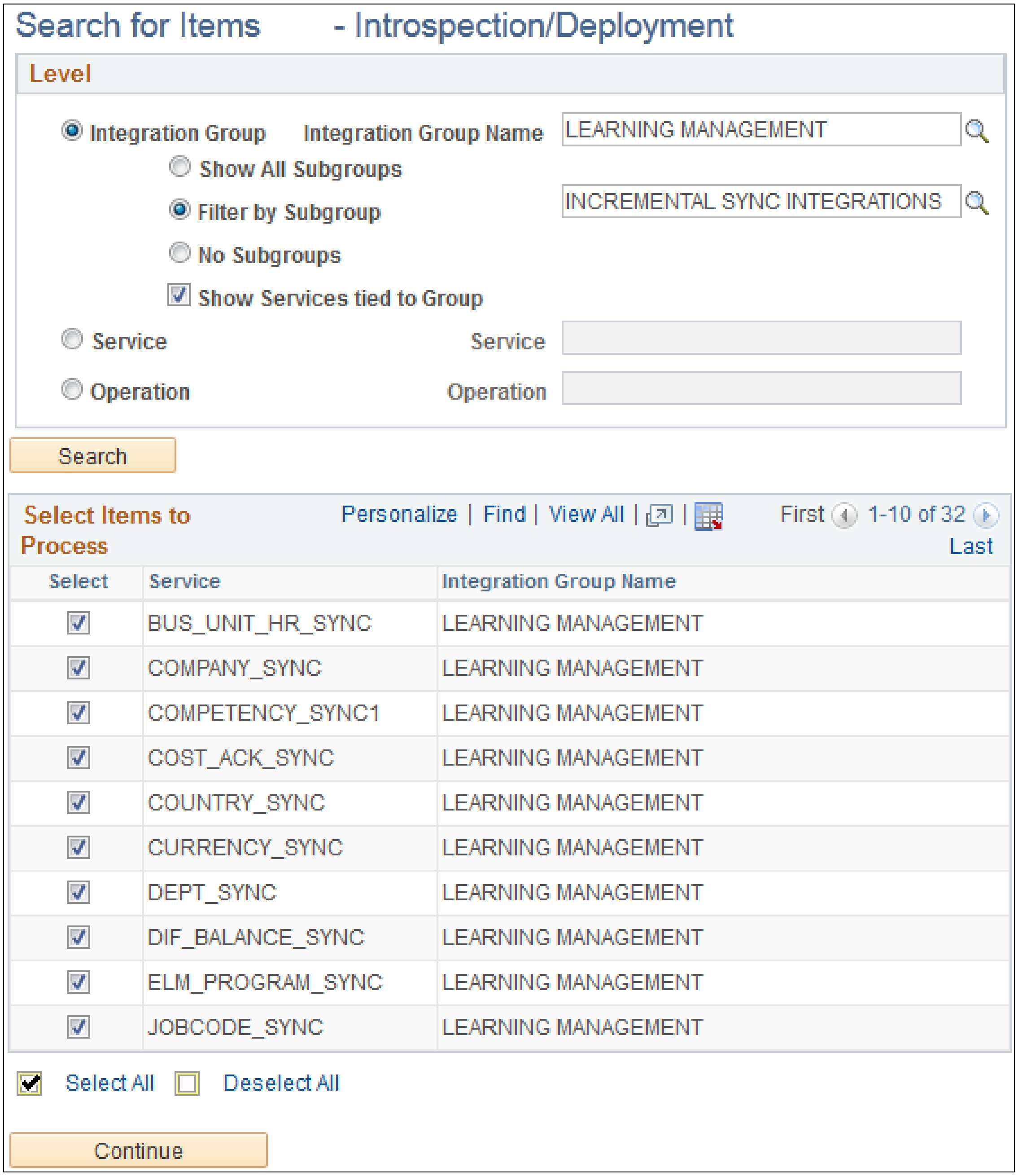
To perform Introspection and Deployment for the 11 required incremental sync services of the Learning Management integration group:

1. Click the Introspection and Deployment link in the Integration Network WorkCenter (**PeopleTools** > **Integration Broker** > **Integration Network WorkCenter**).

2. Enter *LEARNING MANAGEMENT* in the **Integration Group Name** field and *INCREMENTAL SYNC INTEGRATIONS* in the **Filter by Subgroup** field.

3. Click Search.

   This example illustrates the search results for the LEARNING MANAGEMENT integration group and INCREMENTAL SYNC INTEGRATIONS subgroup.



4. Click **View All** to see the entire list of search results.

5. Click **Deselect All** to clear all of the check boxes.

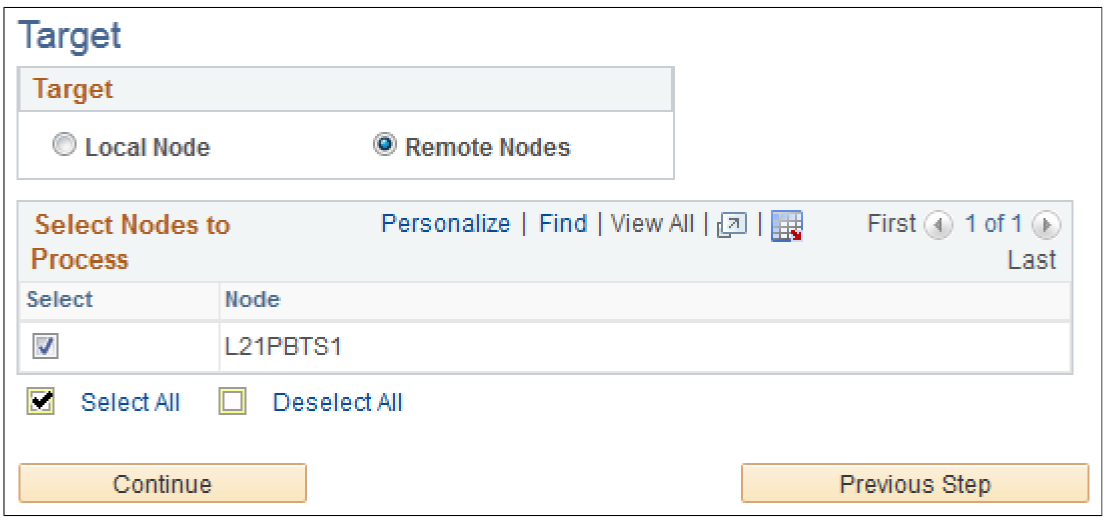
6. Select the check box next to the following 11 services:

   - BUS_UNIT_HR_SYNC

- COMPANY_SYNC
- COUNTRY_SYNC
- CURRENCY_SYNC
- DEPT_SYNC
- JOBCODE_SYNC
- PERSON_BASIC_SYNC
- POI_TYPE_TBL_SYNC
- POSITION_SYNC
- STATE_SYNC
- WORKFORCE_SYNC

7. Click **Continue**. The Target page appears.

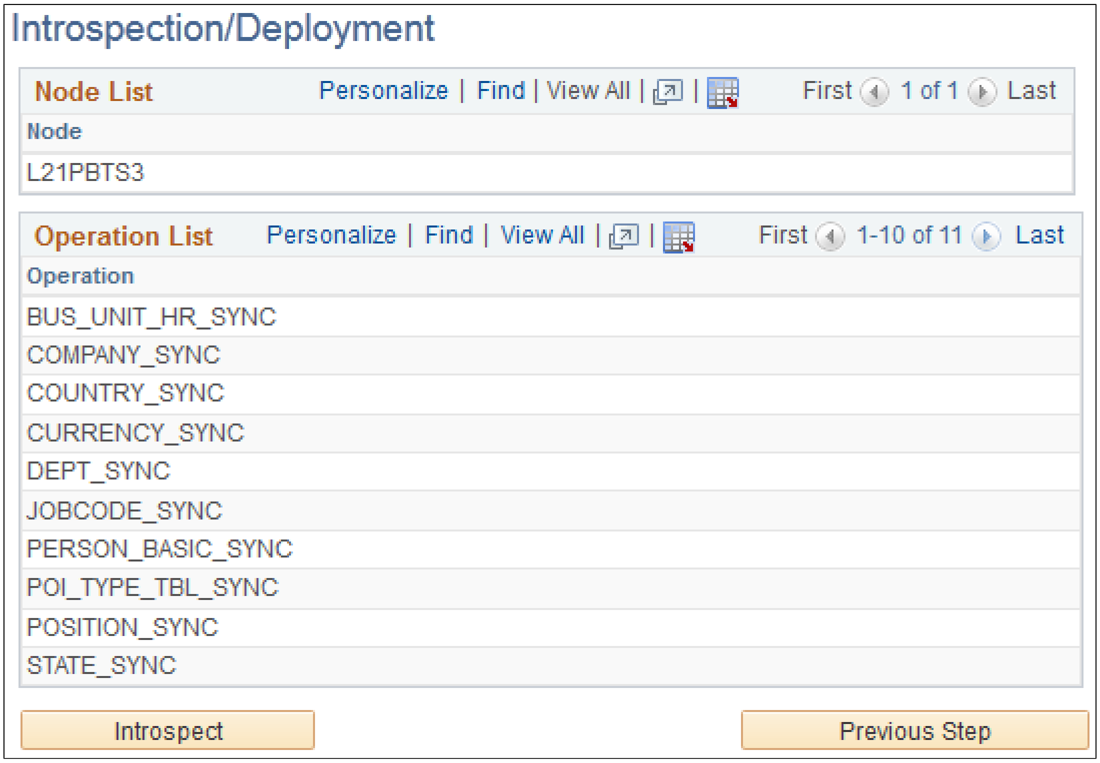
   This example illustrates the Target page with the remote ELM node selected.



   Make sure that the remote ELM node is selected.

8. Click **Continue** and confirm that your Node List and Operation List are correct.

This is an example of the what your Node List and Operation List might look like for your incremental sync integrations.



9. Click Introspect to generate a list of the integration broker setups that must be deployed. The system identifies whether service operations, handlers, and routings need to be activated.

   To ensure that routings are created with the appropriate transformation settings required for HCM and ELM integration, the system uses a Deployment Configuration table that contains information about how the integration routings need to be created and activated.

This is an example of the Introspection Results for incremental sync operations that you should see prior to clicking the Deploy button.

Introspection Results

Node List Find First 1 of 1 Last

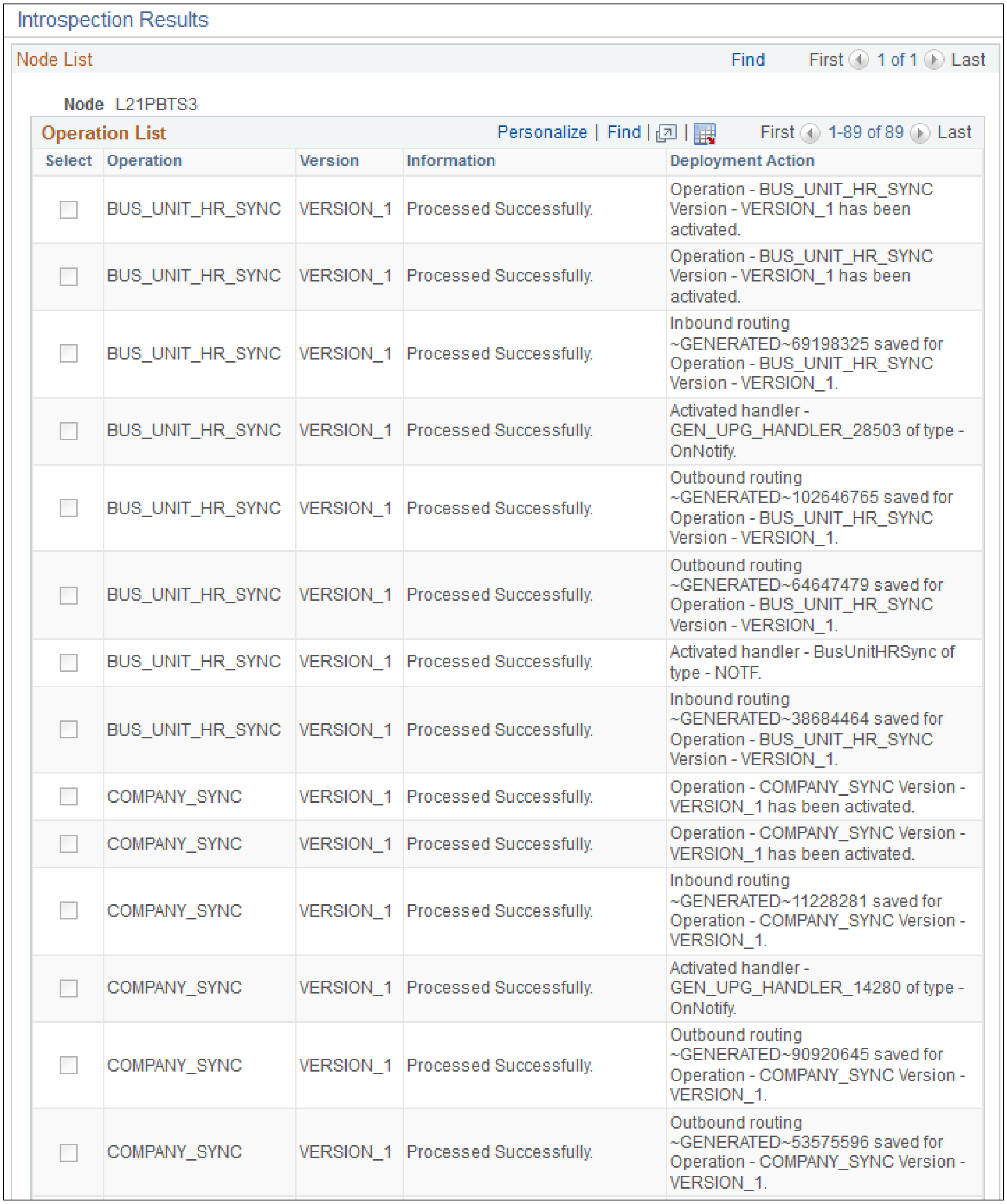
Node L21PBTS3

Operation List Personalize | Find | First 1-89 of 89 Last

Select	Operation	Version	Information	Deployment Action
☐	BUS_UNIT_HR_SYNC	VERSION_1	Local Operation/Version is inactive.	Activate local Operation/Version.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Outbound integration remote Oper/Ver not active. Alias - BUS_UNIT_HR_SYNC.VERSION_1 Remote operation - BUS_UNIT_HR_SYNC Version - VERSION_1.	Activate remote Operation/Version.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Missing inbound routing for alias - BUS_UNIT_HR_SYNC.VERSION_1 on Operation - BUS_UNIT_HR_SYNC Version - VERSION_1.	Create remote routing.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Remote handler of type - NOTF is inactive. Operation - BUS_UNIT_HR_SYNC Name - GEN_UPG_HANDLER_28503.	Activate remote handler.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Local outbound routing is missing.	Create local routing.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Missing outbound routing on remote node for alias - BUS_UNIT_HR_SYNC.VERSION_1 on operation - BUS_UNIT_HR_SYNC version - VERSION_1.	Create remote routing.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Local handler BusUnitHRSync of type NOTF is inactive.	Activate local handler.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Local inbound routing is missing.	Create local routing.
☐	COMPANY_SYNC	VERSION_1	Local Operation/Version is inactive.	Activate local Operation/Version.
☐	COMPANY_SYNC	VERSION_1	Outbound integration remote Oper/Ver not active. Alias - COMPANY_SYNC.VERSION_1 Remote operation - COMPANY_SYNC Version - VERSION_1.	Activate remote Operation/Version.
☐	COMPANY_SYNC	VERSION_1	Missing inbound routing for alias - COMPANY_SYNC.VERSION_1 on Operation - COMPANY_SYNC Version - VERSION_1.	Create remote routing.
☐	COMPANY_SYNC	VERSION_1	Remote handler of type - NOTF is inactive. Operation - COMPANY_SYNC Name - GEN_UPG_HANDLER_14280.	Activate remote handler.
☐	COMPANY_SYNC	VERSION_1	Local outbound routing is missing.	Create local routing.

10. Scroll to the bottom, click **Select All**, and click **Deploy**. The system should update the Information and Deployment Action columns of your Introspection Results to indicate that the operations were deployed successfully.

This is an example of the Introspection Results for incremental sync operations that you should see after clicking the Deploy button.



Introspection Results

Node List — Find — First 1 of 1 Last

Node L21PBTS3

Operation List — Personalize | Find | First 1-89 of 89 Last

Select	Operation	Version	Information	Deployment Action
☐	BUS_UNIT_HR_SYNC	VERSION_1	Processed Successfully.	Operation - BUS_UNIT_HR_SYNC Version - VERSION_1 has been activated.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Processed Successfully.	Operation - BUS_UNIT_HR_SYNC Version - VERSION_1 has been activated.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Processed Successfully.	Inbound routing ~GENERATED~69198325 saved for Operation - BUS_UNIT_HR_SYNC Version - VERSION_1.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Processed Successfully.	Activated handler - GEN_UPG_HANDLER_28503 of type - OnNotify.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Processed Successfully.	Outbound routing ~GENERATED~102646765 saved for Operation - BUS_UNIT_HR_SYNC Version - VERSION_1.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Processed Successfully.	Outbound routing ~GENERATED~64647479 saved for Operation - BUS_UNIT_HR_SYNC Version - VERSION_1.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Processed Successfully.	Activated handler - BusUnitHRSync of type - NOTF.
☐	BUS_UNIT_HR_SYNC	VERSION_1	Processed Successfully.	Inbound routing ~GENERATED~38684464 saved for Operation - BUS_UNIT_HR_SYNC Version - VERSION_1.
☐	COMPANY_SYNC	VERSION_1	Processed Successfully.	Operation - COMPANY_SYNC Version - VERSION_1 has been activated.
☐	COMPANY_SYNC	VERSION_1	Processed Successfully.	Operation - COMPANY_SYNC Version - VERSION_1 has been activated.
☐	COMPANY_SYNC	VERSION_1	Processed Successfully.	Inbound routing ~GENERATED~11228281 saved for Operation - COMPANY_SYNC Version - VERSION_1.
☐	COMPANY_SYNC	VERSION_1	Processed Successfully.	Activated handler - GEN_UPG_HANDLER_14280 of type - OnNotify.
☐	COMPANY_SYNC	VERSION_1	Processed Successfully.	Outbound routing ~GENERATED~90920645 saved for Operation - COMPANY_SYNC Version - VERSION_1.
☐	COMPANY_SYNC	VERSION_1	Processed Successfully.	Outbound routing ~GENERATED~53575596 saved for Operation - COMPANY_SYNC Version - VERSION_1.

Chapter 8

Setting Up Automatic Enrollment Due to HCM Status and Job Changes

Understanding Automatic Enrollment Due to HCM Status and Job Changes

PeopleSoft ELM enables you to configure your system to automatically enroll employees in learning items when you import new or updated job data from PeopleSoft HCM using the WORKFORCE_SYNC EIP. This functionality removes the burden from ELM administrators and managers of having to manually check for new hires and job changes that require enrollment in learning items.

Active Analytics Framework

PeopleSoft ELM leverages the Active Analytics Framework (AAF) to develop and maintain the rules that your system uses to determine when automatic enrollment is required. AAF provides you with a great deal of flexibility, enabling you to create rules as simple or as complex as required to suit the needs of your organization.

Install Defaults Setup

To enable automatic enrollment due to HCM status and job changes for your system, you must select the Allow Auto Enrollment check box on the Install Defaults - Enrollment page.

Related Links

Understanding Person and Organization EIPs

Setting Up Active Analytics Framework for Automatic Enrollment Due to HCM Status and Job Changes

Install Defaults – Enrollment Page

Setting Up Active Analytics Framework for Automatic Enrollment Due to HCM Status and Job Changes

Note: As illustrated in the screen shots of this topic, PeopleSoft ELM delivers examples of Active Analytics Framework (AAF) setup for the purpose of automatic enrollment due to HCM status and job changes. You can use this sample data as a model when defining the AAF setup for your own system.

Pages Used to Set Up Active Analytics Framework for Automatic Enrollment Due to HCM Status and Job Changes

Page Name	***Definition Name***	***Usage***
Register Trigger Type Page	EOCF_EVTYP_DEFN	Define trigger types.
Manage Context Object - Definition Page	EOCF_CONTEXT_DEFN	Define context objects.
Register Action Type Page	EOCF_ACTN_TYPE_REG	Register action types.
Register Trigger Point Page	EOCF_EVENT_DEFN	Define trigger points.
Define Implementation Page	EOCF_IMPL_DEFN	Define an implementation.
Define Subject Areas Page	EOCF_SUBJ_HIER	Define subject areas.
Manage Terms - Term Definition Page	EOCF_TERM_DEFN	Define and manage terms.
Manage Terms - Subject Areas Page	EOCF_TERM_SUBAREA	Define subject area details for a term.
Manage Terms - Policy Options Page	EOCF_TERM_INACTION	Define policy options for a term.
Build a Policy Page	EOCF_RULE_DEFN	Configure a policy.
Edit Condition Page	EOCF_RULE_PHRASE	Edit a condition defined for a policy.
Edit Actions Page	EOCF_RULE_ACTION	Edit an action defined for a policy.
Learnings Page	LM_AAF_LEARNING	Add learning to a policy action.
Payment Page	LM_AAF_PYMTS	Define payment details for learning associated with a policy action.

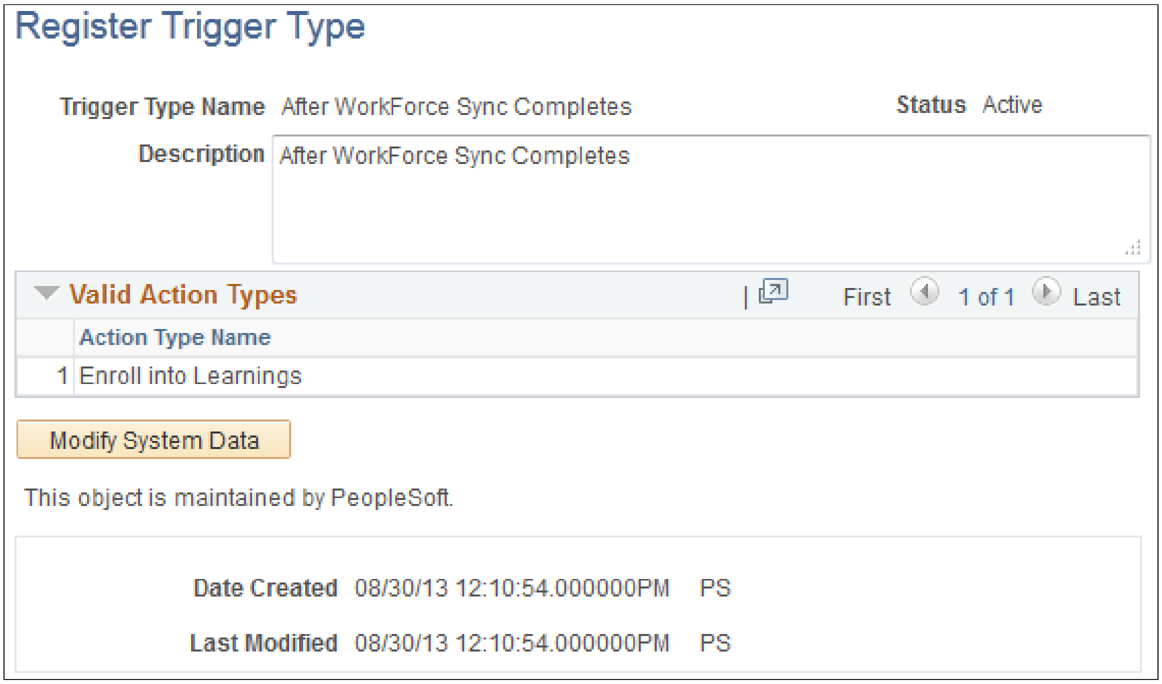
Register Trigger Type Page

Use the Register Trigger Type page (EOCF_EVTYP_DEFN) to define trigger types.

Navigation:

Enterprise Components > **Active Analytics Framework** > **Setup** > **Trigger Type**

This example illustrates the fields and controls on the Register Trigger Type page.



Use this page to define trigger types that are used to group similar triggers together.

For more information on this page, see “Registering Trigger Types and Trigger Points” (Active Analytics Framework).

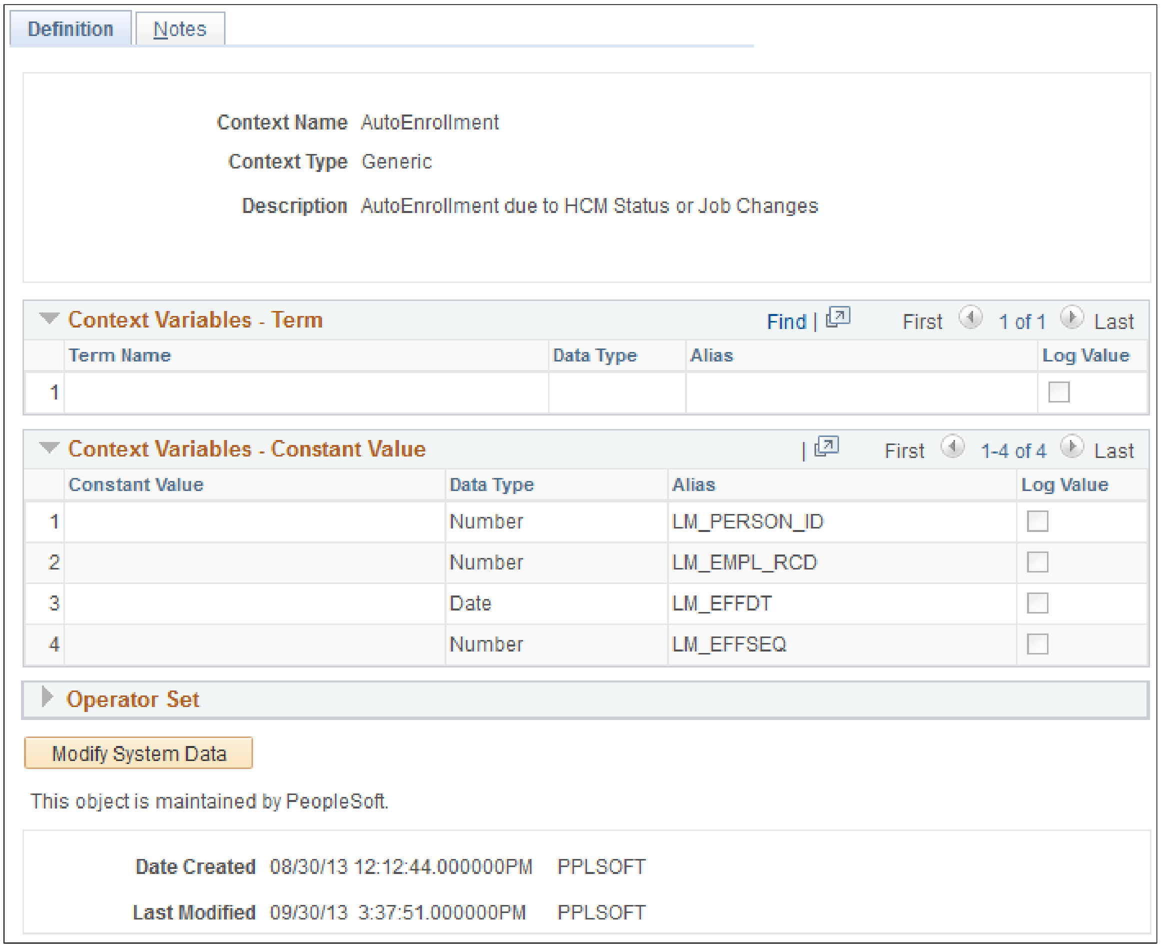
Manage Context Object - Definition Page

Use the Manage Context Object - Definition page (EOCF_CONTEXT_DEFN) to define context objects.

Navigation:

Enterprise Components > **Active Analytics Framework** > **Setup** > **Manage Context Object**

This example illustrates the fields and controls on the Manage Context Object - Definition page.



Use this page to specify the context variables that the system uses for term resolution. You associate the context defined here with trigger points and terms.

Note: In this example, the value of the **Context Type** field is *Generic* because it is used outside of the component.

For more information on this page, see “Configuring Contexts” (Active Analytics Framework).

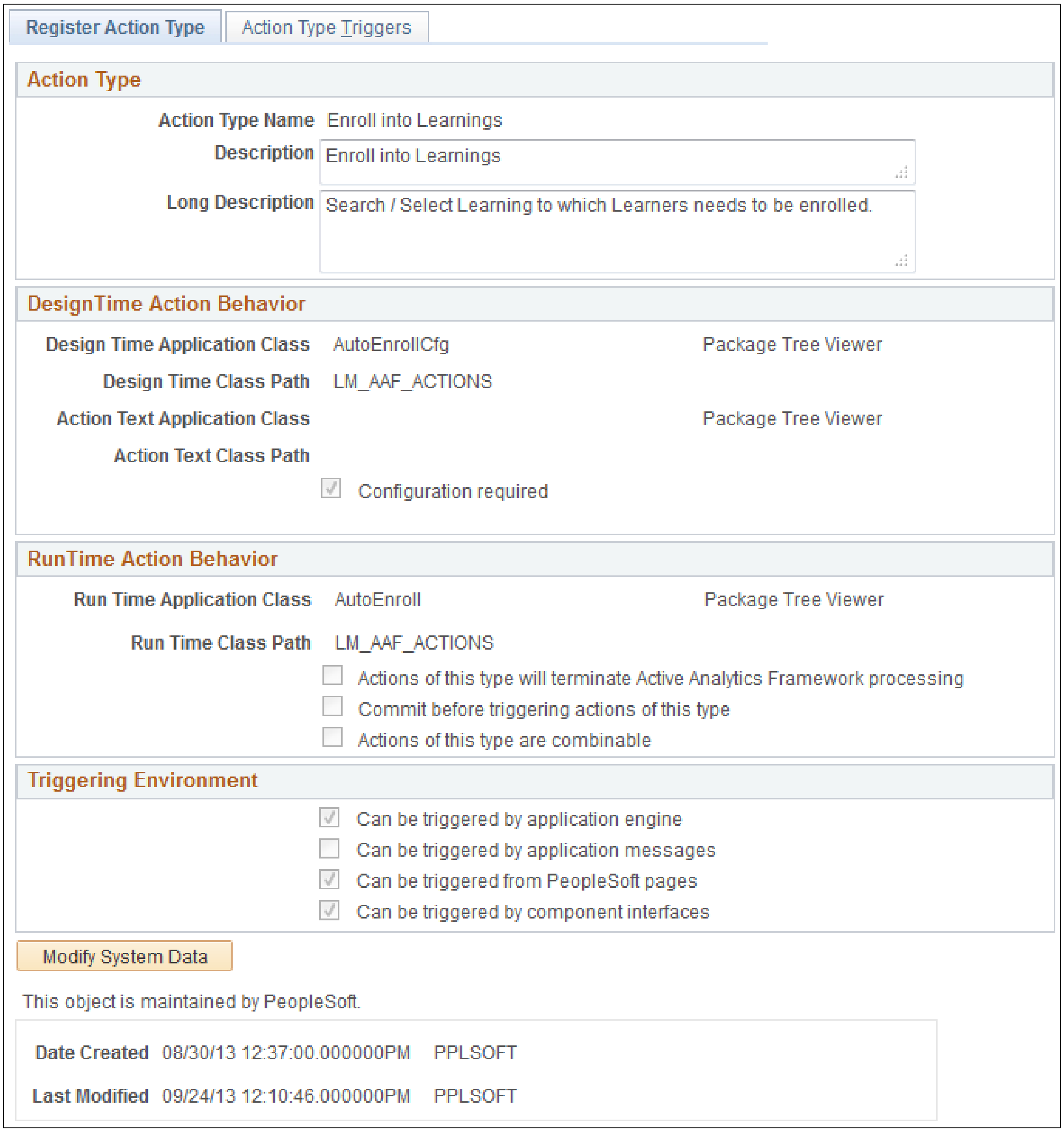
Register Action Type Page

Use the Register Action Type page (EOCF_ACTN_TYPE_REG) to register action types.

Navigation:

Enterprise Components > **Active Analytics Framework** > **Action Framework** > **Register Action Type**

This example illustrates the fields and controls on the Register Action Type page.



Use this page to define the action type that determines the behavior of the policy.

Design Time Action Behavior

This example uses the *AutoEnrollCfg* **Design Time Application Class** , which drives policy action behavior during policy configuration. The *AutoEnrollCfg* application class is what enables you to access the Learnings page when you click the Configure button on the Edit Actions Page.

Run Time Action Behavior

This example uses the *AutoEnroll* **Run Time Application Class**, which includes the logic that drives policy behavior when the policy is executed.

For more information on this page, see “Registering Action Types and Action Type Bundles” (Active Analytics Framework).

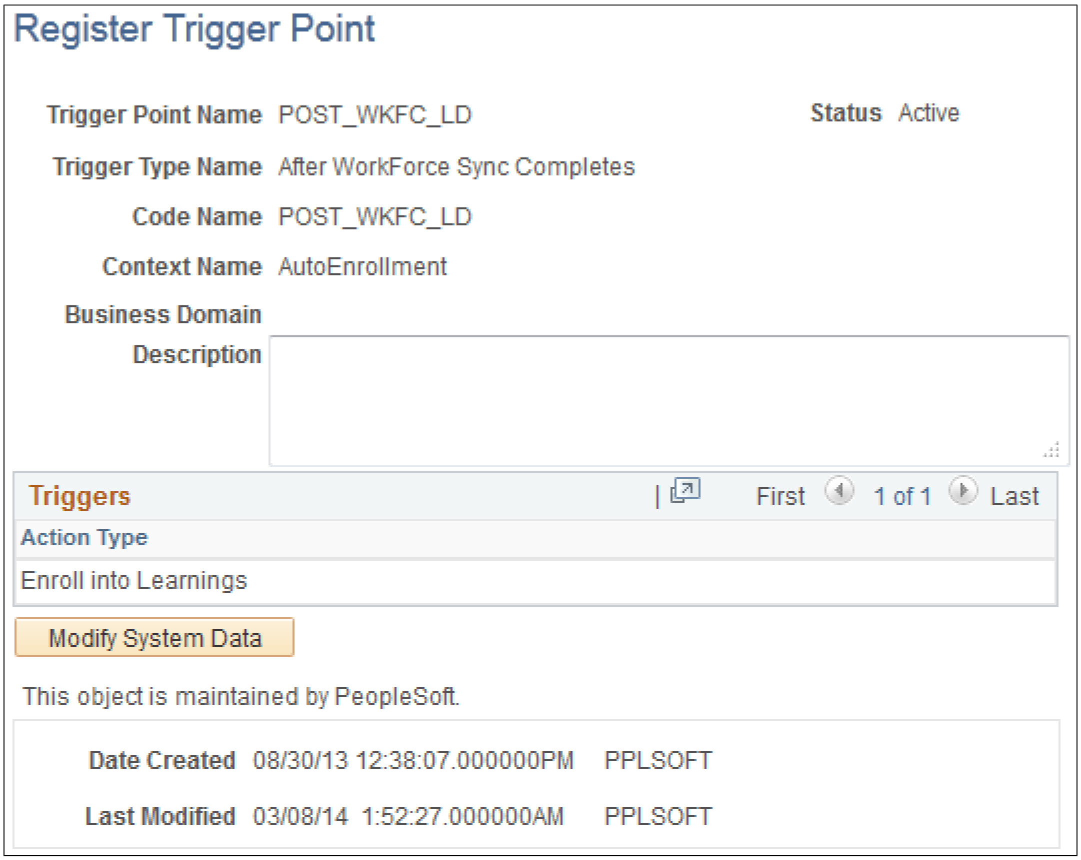
Register Trigger Point Page

Use the Register Trigger Point page (EOCF_EVENT_DEFN) to define trigger points.

Navigation:

Enterprise Components > **Active Analytics Framework** > **Setup** > **Register Trigger Point**

This example illustrates the fields and controls on the Register Trigger Point page.



This example shows the *POST_WKFC_LD* trigger point. At run time, the system evaluates all policies associated with the POST_WKFC_LD trigger point using the batch process LM_AENRL_AAF. The system initiates this process when the Process Asynchronous Data (LM_LD_ASYC) batch process completes if the Allow Auto Enrollment check box is selected on the Install Defaults - Enrollment page.

Notice that the trigger type and the context object are mapped to the trigger point.

Related Links

“Registering Trigger Types and Trigger Points” (Active Analytics Framework)

Process Asynchronous Data Page

Install Defaults – Enrollment Page

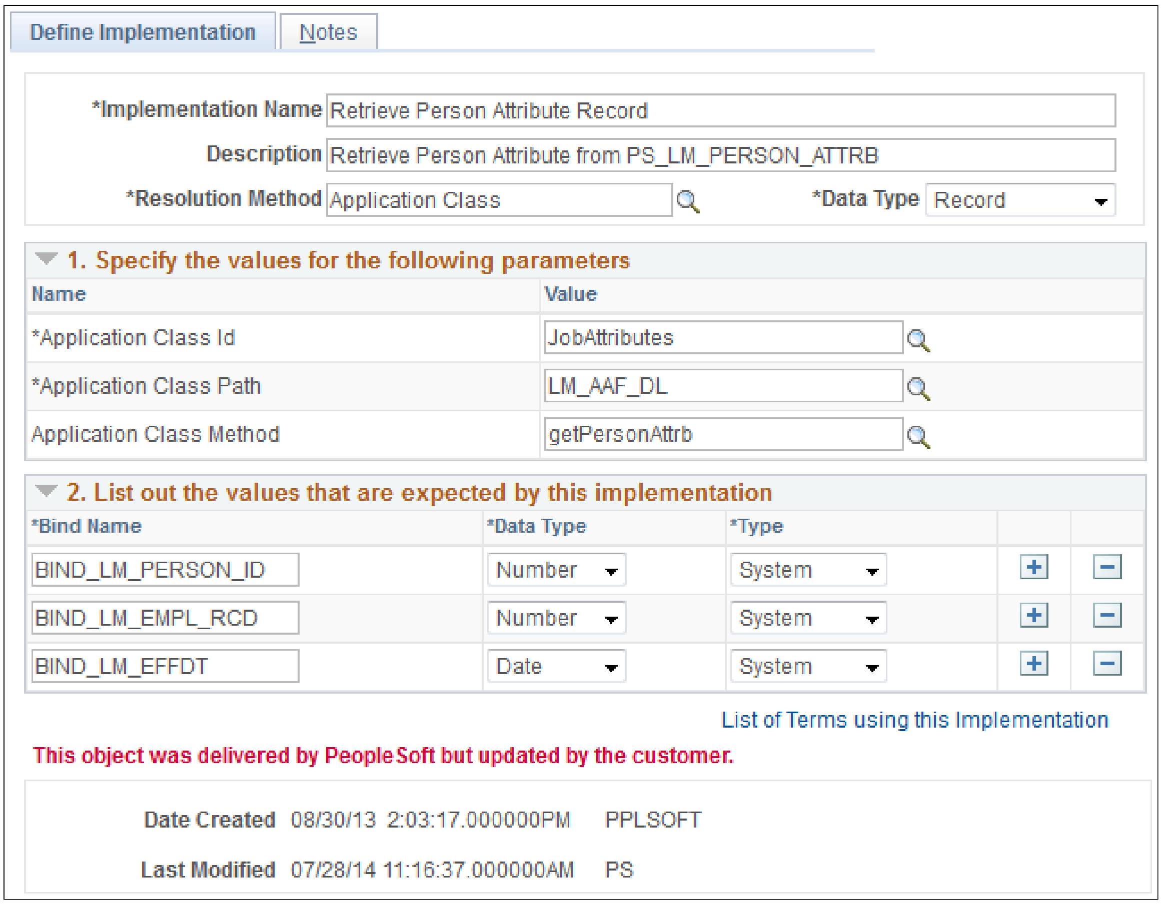
Define Implementation Page

Use the Define Implementation page (EOCF_IMPL_DEFN) to define an implementation.

Navigation:

Enterprise Components > **Active Analytics Framework** > **Data Library** > **Define Implementations**

This example illustrates the fields and controls on the Define Implementation page.



Use this page to define implementations, which specify the logic that the system uses during term resolution. This example illustrates an implementation defined for retrieving terms associated with person attribute data, such as JobCode_ID.

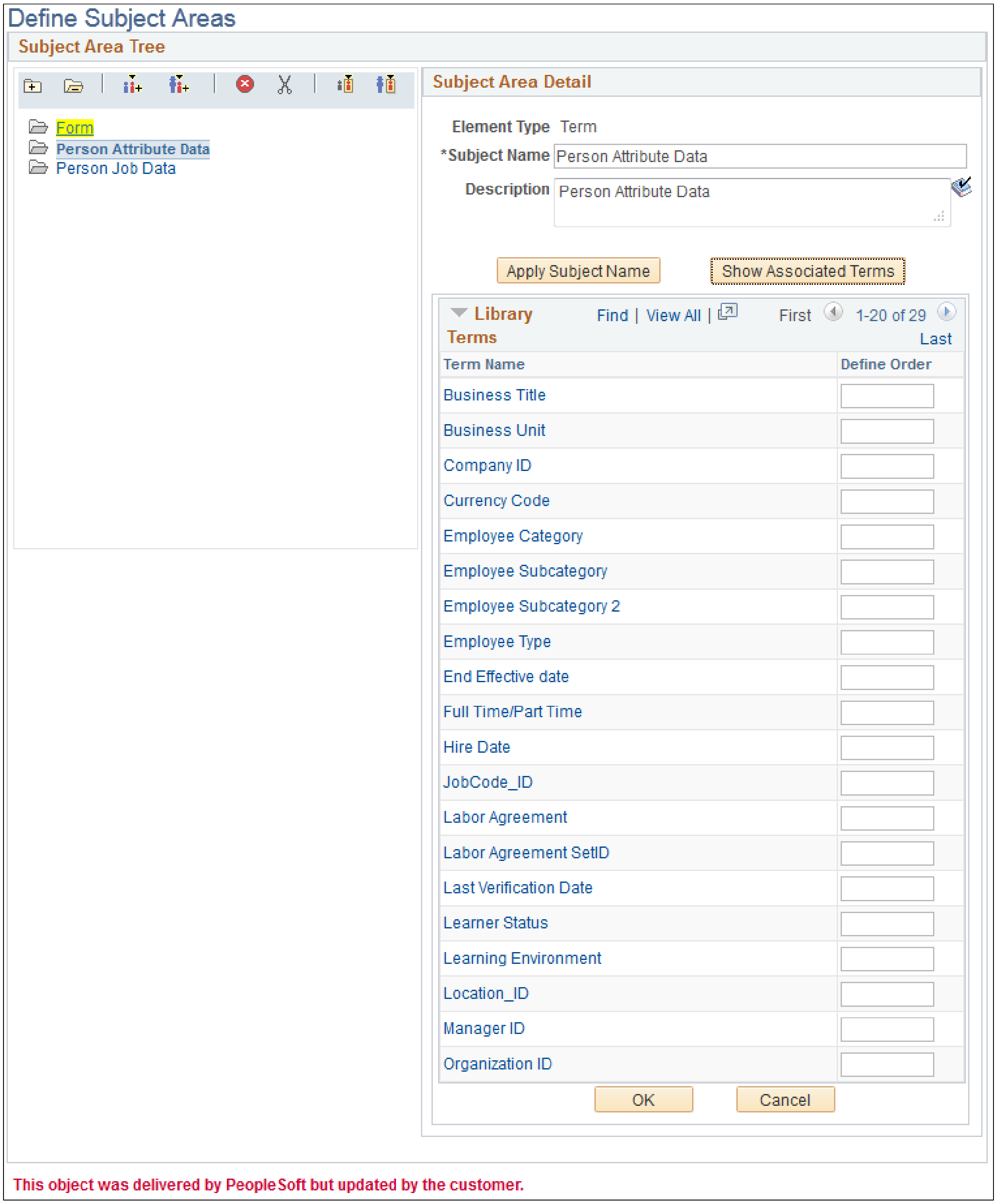
Define Subject Areas Page

Use the Define Subject Areas page (EOCF_SUBJ_HIER) to define subject area.

Navigation:

Enterprise Components > **Active Analytics Framework** > **Setup** > **Register Trigger Point**

This example illustrates the fields and controls on the Define Subject Areas page.



Before you define terms, you must create subject areas in which you can group related terms. When you define a term, you associate it to a subject area.

Field or Control	***Description***
Show Associated Terms	Click to view a list of terms that are currently associated to the subject area.

For more information on this page, see “Defining Subject Areas” (Active Analytics Framework).

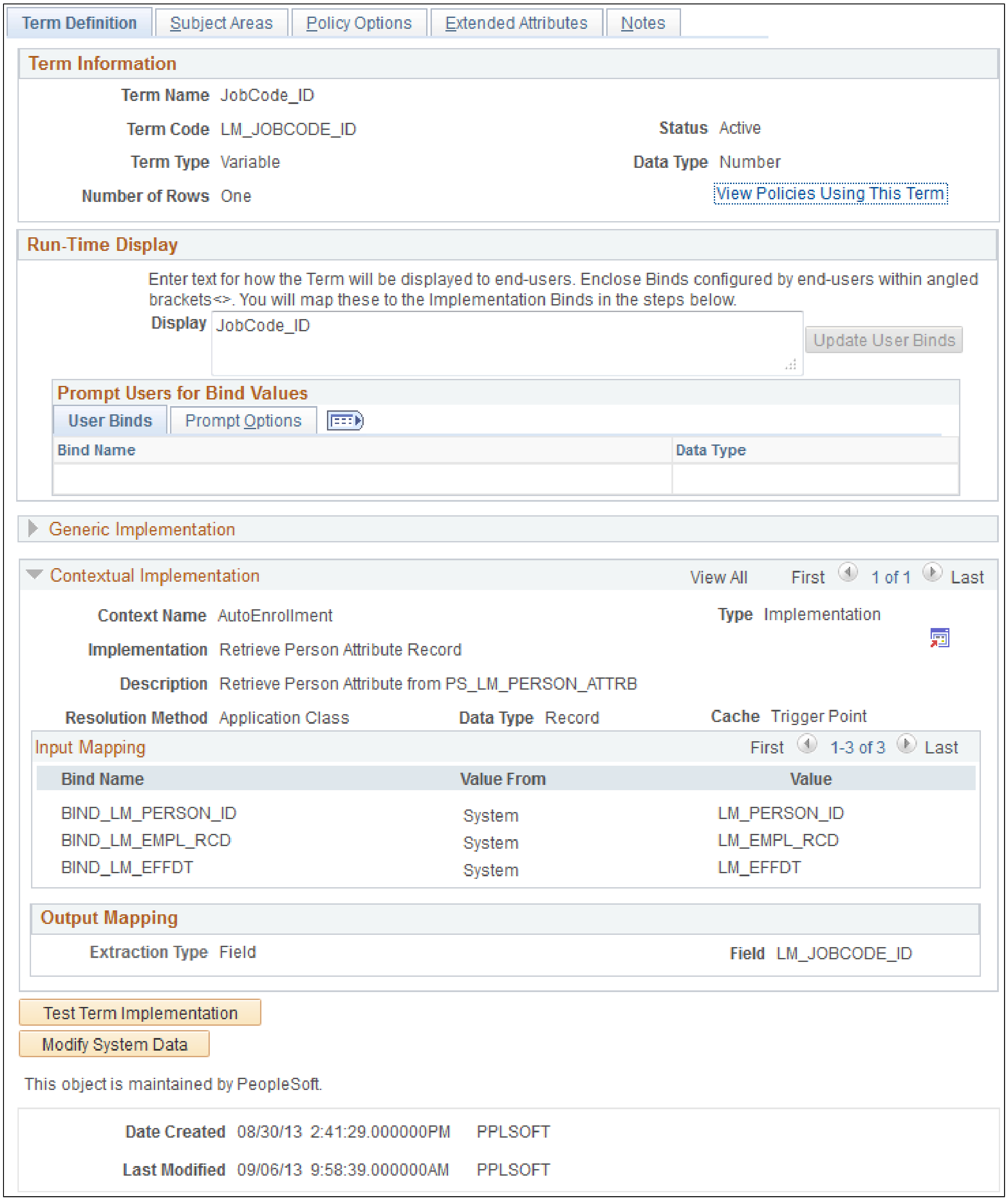
Manage Terms - Term Definition Page

Use the Manage Terms - Term Definition page (EOCF_TERM_DEFN) to define and manage terms.

Navigation:

Enterprise Components > Active Analytics Framework > Data Library > Manage Terms > Term Definition

This example illustrates the fields and controls on the Manage Terms - Term Definition page.



Use this page to define terms, which are the building blocks used to define policy conditions. You must register a term in the Active Analytics Framework before you can use it. The system evaluates imported employee data based on the terms used in policy conditions. Terms are resolved as either true or false.

Field or Control	***Description***
Test Term Implementation	Click to access the Test Term Implementation page where you can enter sample values to test the term results.

For more information on this page, see “Managing Terms” (Active Analytics Framework).

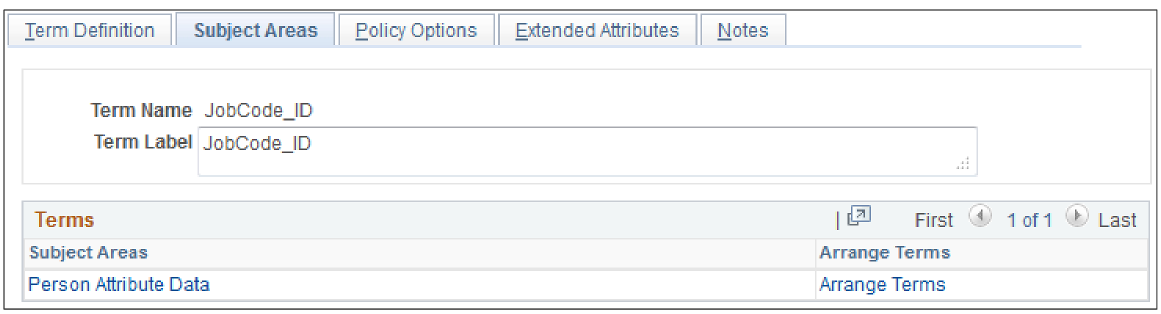
Manage Terms - Subject Areas Page

Use the Manage Terms - Subject Areas page (EOCF_TERM_SUBAREA) to define subject area details for a term.

Navigation:

Enterprise Components > **Active Analytics Framework** > **Data Library** > **Manage Terms** > **Subject Areas**

This example illustrates the fields and controls on the Manage Terms - Subject Areas page.



Use this page to associate a term with relevant subject areas.

For more information on this page, see “Managing Terms” (Active Analytics Framework).

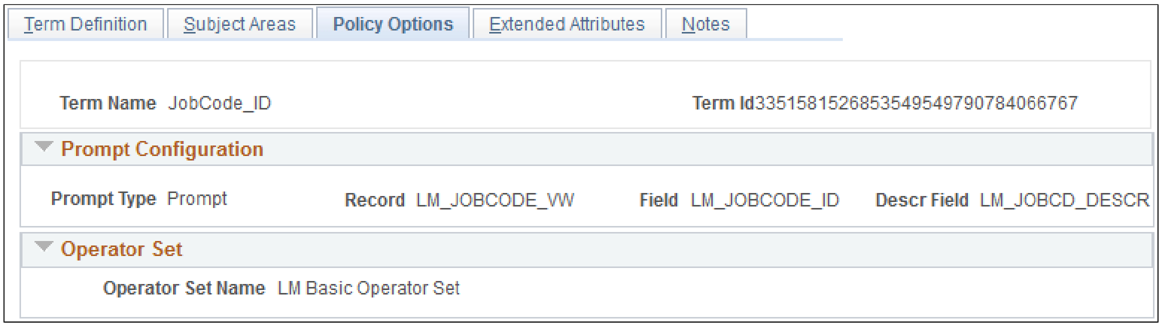
Manage Terms - Policy Options Page

Use the Manage Terms - Policy Options page (EOCF_TERM_INACTION) to define policy options for a term.

Navigation:

Enterprise Components > **Active Analytics Framework** > **Data Library** > **Manage Terms** > **Policy Options**

This example illustrates the fields and controls on the Manage Terms - Policy Options page.



Use this page to determine how term values will be selectable during the configuration of policies that use the term. In this example, the term has a **Prompt Type** of *Prompt,* so when configuring a policy using this term, users can select a value using a prompt table. Other values for the **Prompt Type** field include *Custom, Dropdown,* and *Translate.*

For more information on this page, see “Managing Terms” (Active Analytics Framework).

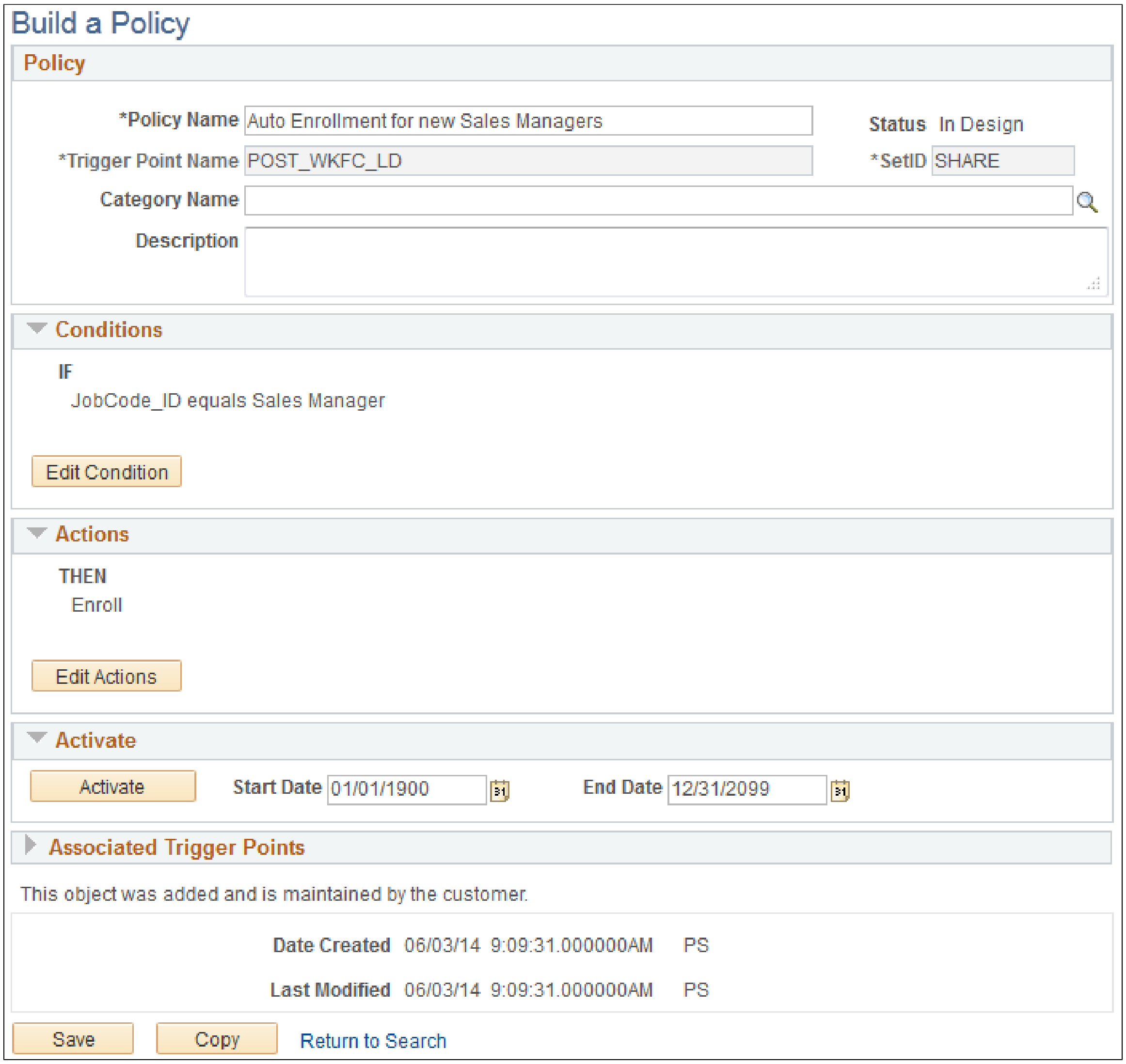
Build a Policy Page

Use the Build a Policy page (EOCF_RULE_DEFN) to configure a policy.

Navigation:

Enterprise Components > **Active Analytics Framework** > **Policies** > **Manage Policies**

This example illustrates the fields and controls on the Build a Policy page.



You can use this page to build a new policy or to edit an existing policy.

In this example, the policy is associated with the *POST_WKFC_LD* trigger point. At run time, the system evaluates all policies associated with the POST_WKFC_LD trigger point using the batch process LM_AENRL_AAF. The system initiates this process when the Process Asynchronous Data (LM_LD_ASYC) batch process completes if the Allow Auto Enrollment check box is selected on the Install Defaults - Enrollment page.

By changing policy conditions and actions, you can reconfigure application components, thereby enabling a business process change without having to modify application code, or requesting help from IT personnel.

Note: All delivered policies have a **Status** of *In Design* and must be activated before they can be used.

Related Links

"Building Policies" (Active Analytics Framework)

Process Asynchronous Data Page

Install Defaults – Enrollment Page

Edit Condition Page

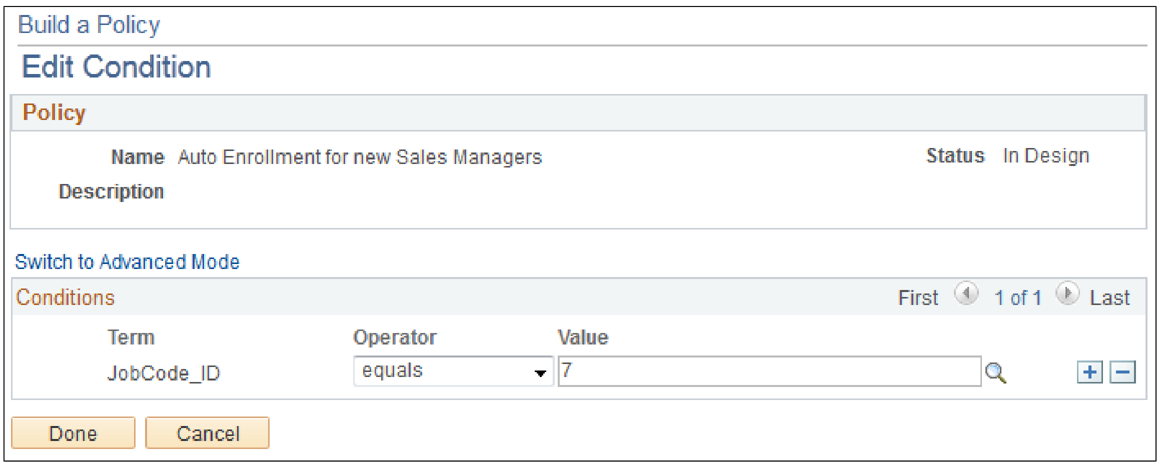
Use the Edit Condition page (EOCF_RULE_PHRASE) to edit conditions defined for a policy.

Note: If you are building a new policy, this page is labeled Add Condition.

Navigation:

Click the Edit Condition or Add Condition button on the Build a Policy page.

This example illustrates the fields and controls on the Edit Condition page.



There are two modes available for specifying conditions:

- Basic.

  This is the default mode; the default logical operator is AND.

- Advanced.

  You can group condition rows using parentheses, specify logical operators (AND, OR), and specify terms as values in the right-hand side.

To add a condition row:

1. Select a term. Configure the term if it is linked.
2. Select an operator.
3. Enter or select one or more values on the right-hand side.

For more information on this page, see “Building Policies” (Active Analytics Framework).

Edit Actions Page

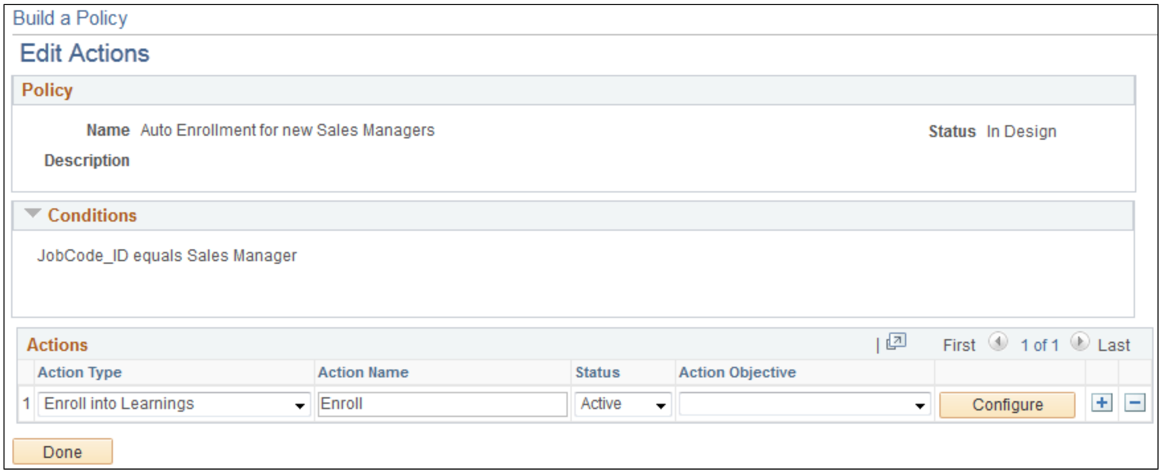
Use the Edit Actions page (EOCF_RULE_ACTION) to edit actions defined for a policy.

Note: If you are building a new policy, this page is labeled Add Actions.

Navigation:

Click the Edit Action or Add Action button on the Build a Policy page.

This example illustrates the fields and controls on the Edit Actions page.



For actions with the *Enroll into Learnings* action type, you can click the **Configure** button to access the Learnings page where you can add learning items for the policy action.

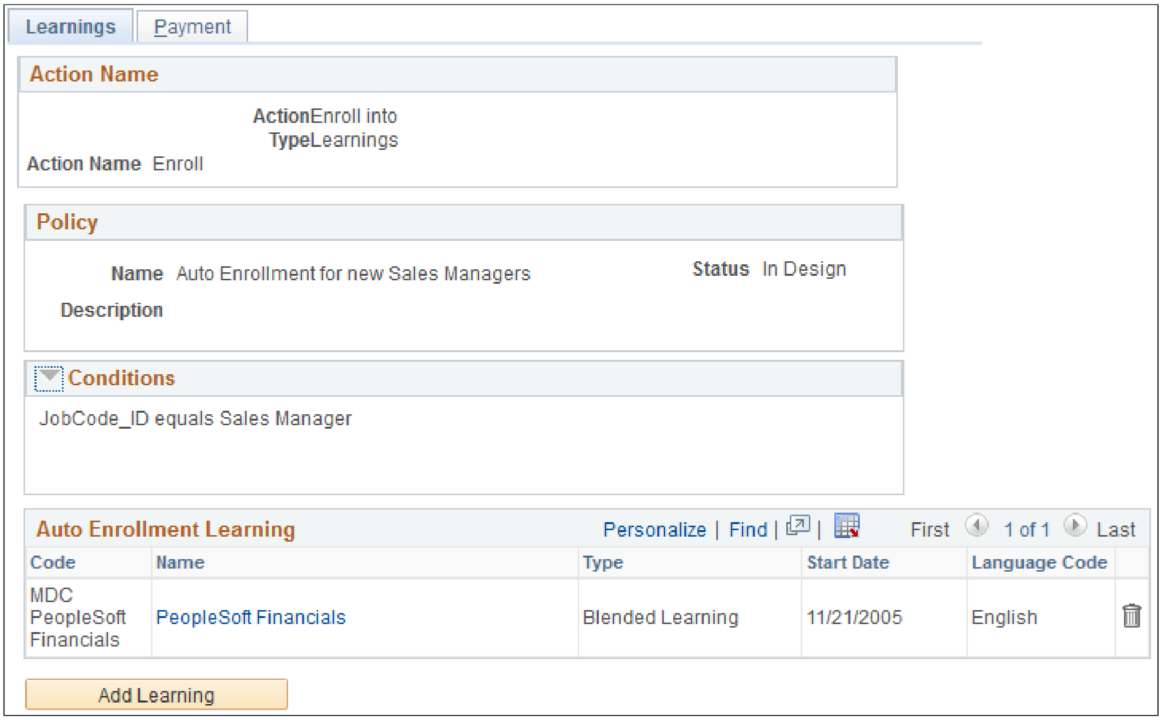
Learnings Page

Use the Learnings page (LM_AAF_LEARNING) to add learning to a policy action.

Navigation:

Click the Configure button on the Edit Actions page.

This example illustrates the fields and controls on the Learnings page.



This page is developed specifically for ELM. It enables you to add learning items to the policy action.

Field or Control	***Description***
Add Learning	Click to access the Find Learning page where you can select learning items to add to the policy action.

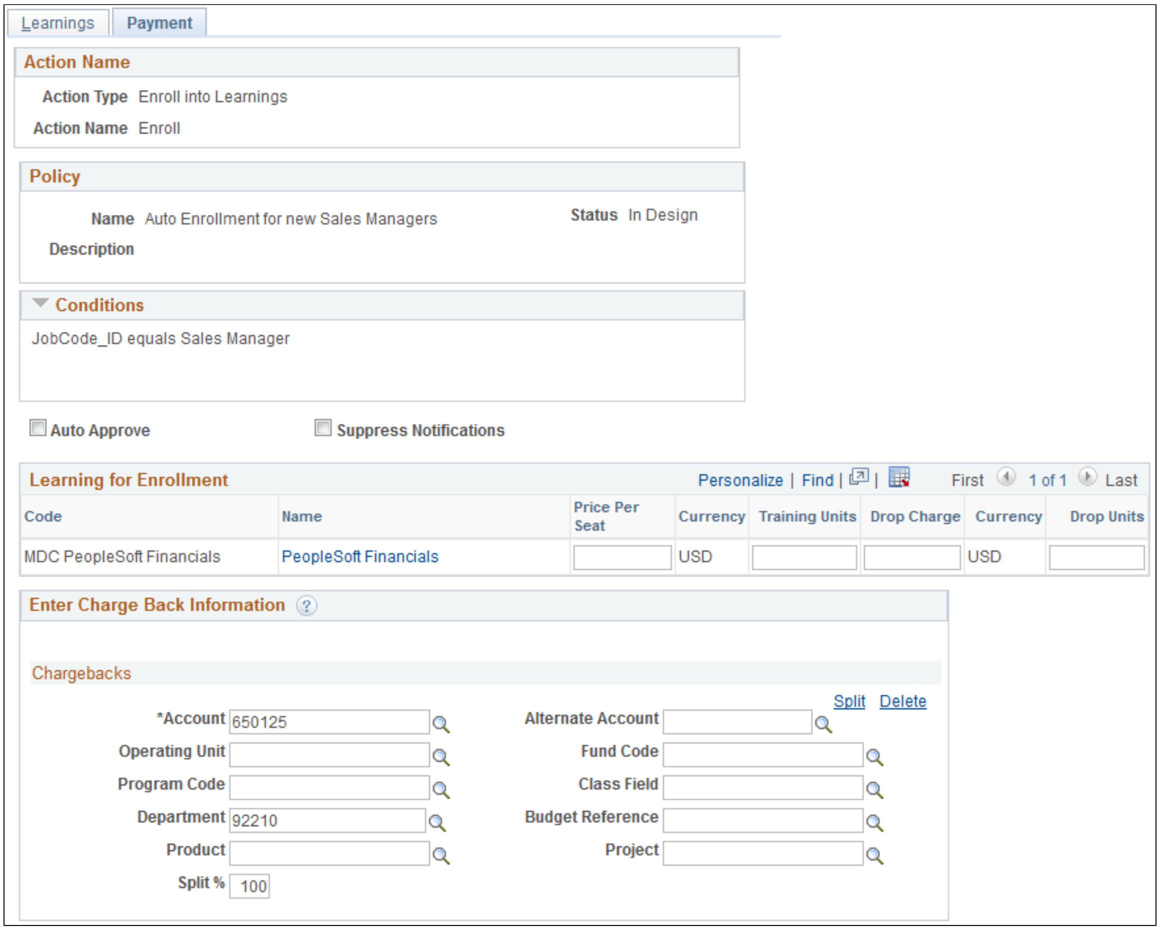
Payment Page

Use the Payment page (LM_AAF_PYMTS) to define payment details for learning associated with a policy action.

Navigation:

Click the Payment tab from the Learnings page.

This example illustrates the fields and controls on the Payment page.



This page is developed specifically for ELM. It enables you to enter payment details such as class fees and chargeback information for the learning items associated with the policy action.

The fields and controls of this page are identical to those on the Enroll Learners - Payment Details Page.

Chapter 9

Setting Up the Approval Framework

Understanding the Approval Framework

This topic discusses:

- Approval workflow in Enterprise Learning Management.
- Delivered approval process definitions.
- Approval process definition setup.

Approval Workflow in Enterprise Learning Management

Many PeopleSoft applications use workflow to automate the movement of tasks and information from one role or user to another:

- From employee to manager.
- Between managers.
- From managers to administrators.

Although workflow can be used to route different kinds of tasks and information between users, most workflow in Enterprise Learning Management involves approval processing. For example, when a student selects a course from the catalog that requires approval, his/her enrollment request may go to a manager, an administrator, or a user outside the management hierarchy for approval. Workflow for enrollment and registration approvals is managed by the Approvals Framework—a specialized interface that enables you to set up approval process definitions using existing components without writing code. These process definitions specify workflow routing rules and steps, and the users who will review and approve each step in a transaction.

Using workflow approval processes, you can:

- Approve, deny, push back, or delegate individual items in a transaction.
- Approve and deny multiple transactions at a single time.
- Define multiple approvers for individual transactions.
- Assign additional approvers and reviewers during the approval process.
- Escalate approvals.
- Send worklist and email notifications.

Delivered Approval Process Definitions

Enterprise Learning Management delivers approval process definitions as sample data that you can use to trigger approval workflow when a learner makes an enrollment request, a program registration request, or requests supplemental learning. Based on these sample process definitions, the system routes learning requests to managers, administrators, and other system users for approval, and sends workflow items or emails to designated users notifying them of their role in the approval chain.

- When a class, program, or supplemental learning request triggers approval processing, there is one "initial" approver and one or more subsequent approvers.
- If the learner has no "initial" approver (a manager, for example), the learner's request is auto-approved.
- The initial approver of a learning request can take one of two actions: approve or deny.
- Subsequent approvers of a learning request can take one of three actions: approve, deny, or push back.

  Subsequent approvers might be senior managers or others in the management hierarchy, or users who are outside the management hierarchy, such as individuals in the finance or legal department.

  This table lists the delivered approval process definitions:

Approval Process Definition	***Description***
ACT BOTH-SPECIAL	Class enrollment — both internal and external learners require special approval.
ACT INT-MGR EXT-NONE	Class enrollment — internal learners require manager approval, no approval is required for external learners.
ACT INT-MGR EXT-PAYADMIN	Class enrollment — internal learners require manager approval, external learners require approval from the payment administrator.
ACT INT-MGR EXT-SPECIAL	Class enrollment — internal learners require manager approval, external learners require approval from a special approver.
ACT INT-NONE EXT-PAYADMIN	Class enrollment — internal learners require no approval, external learners require approval from the payment administrator.
ACT INT-NONE EXT-SPECIAL	Class enrollment — internal learners require no approval, external learners require approval from a special approver.
ACT INT-SPECIAL EXT-NONE	Class enrollment — internal learners require approval from a special approver, no approval is required for external learners.

Approval Process Definition	***Description***
ACT INT-SPECIAL EXT-PAYADMIN	Class enrollment — internal learners require approval from a special approver, external learners require approval from the payment administrator.
ACTIVITY ENROLLMENT	Approval path is learner's manager, payment administrator, then special approver, as appropriate.
PRG BOTH-SPECIAL	Program enrollment — both internal and external learners require special approval.
PRG INT-MGR EXT-NONE	Program enrollment — internal learners require manager approval, no approval is required for external learners.
PRG INT-MGR EXT-PAYADMIN	Program enrollment — internal learners require manager approval, external learners require approval from the payment administrator.
PRG INT-MGR EXT-SPECIAL	Program enrollment — internal learners require manager approval, external learners require approval from a special approver.
PRG INT-NONE EXT-PAYADMIN	Program enrollment — internal learners require no approval, external learners require approval from the payment administrator.
PRG INT-NONE EXT-SPECIAL	Program enrollment — internal learners require no approval, external learners require approval from a special approver.
PRG INT-SPECIAL EXT-NONE	Program enrollment — internal learners require approval from a special approver, no approval is required for external learners.
PRG INT-SPECIAL EXT-PAYADMIN	Program enrollment — internal learners require approval from a special approver, external learners require approval from the payment administrator.
PROGRAM REGISTRATION	Approval path is learner's manager, payment administrator, then special approver, as appropriate.
SUP BOTH-LEARNER SELECTED	Supplemental learning enrollment — both internal and external learners require approval from a learner selected approver.
SUP INT-MGR EXT-NONE	Supplemental learning enrollment — internal learners require manager approval, no approval is required for external learners.

Approval Process Definition	***Description***
SUP INT-MGR EXT-SPECIAL	Supplemental learning enrollment — internal learners require manager approval, external learners require approval from a special approver.
SUP INT-NONE EXT-SPECIAL	Supplemental learning enrollment — internal learners require no approval, external learners require approval from a special approver.
SUP INT-SPECIAL EXT-NONE	Supplemental learning enrollment — internal learners require approval from a special approver, no approval is required for external learners.
SUPPLEMENTAL LEARNING	Approval path is learner's manager, payment administrator, then special approver, as appropriate.

Note: These definitions are delivered as sample data and can be modified based on your own approval requirements.

Note: This list includes approval processes created for enrollment in classes, programs, and supplemental learning, as well as a number of more specific approval process definitions delivered for backwards compatibility.

Note: We discuss the three Enterprise Learning Management transactions that use approval processing—class enrollment, program registration, and supplemental learning requests—elsewhere in this documentation.

Related Links

Understanding Enrollment and Registration
Updating Certification Registration Statuses
Understanding Supplemental Learning

Approval Process Definition Setup

This topic discusses:

- General approval process setup.
- Enterprise Learning Management approval process setup.

General Approval Process Setup

The setup pages described in This topic are the basis for the approval processes delivered with many PeopleSoft applications. Within Enterprise Learning Management, these pages are used to define the "sample" approval processes for enrollment, registration, and supplemental learning requests. You can use them to modify these delivered sample processes or to create your own approval definitions.

To modify delivered approval processes or define new process definitions:

1. Access the User List Definition page to define the list of users who can approve enrollment or registration requests.

   For example, you can define user lists to include everyone in a specific role such as the manager or learning administrator role, or select users who meet the criteria specified in a SQL statement or query.

2. Access the Setup Process Definitions component (EOAW_PRCS) and define the following:

   a. The sequence of stages, paths, and steps that make up a process definition.

      A stage consists of one or more approval paths and their associated steps or actions. A path represents a specific sequence of approval steps, and each step represents an approver or approval action within the sequence.

      When you define a process definition, you associate approval steps with user lists (defined in step 1) to control who can approve a learning request.

   b. The criteria that must be satisfied before the system sends users along a specific stage, path, or step in the approval process.

      You can associate criteria with a stage as well as with specific paths or steps that make up a stage when you define path and step details (see steps c and d below).

      For example, you can define criteria to activate an approval path when the cost of enrollment is greater than 100 USD but less than 300 USD. And you can activate a different path when the cost is greater than 300 USD.

   c. Path details.

      This includes:

      1) Defining the criteria that the system uses to determine when to follow a specific path.

      2) Providing instruction for escalating approval steps to a different user when the designated approver fails to approve, deny, or push back an approval request.

   d. Step details.

      This includes:

      1) Defining the users who are authorized to approve learning requests at each step in the path.

      2) Defining the users who are authorized to review approval steps.

      3) Defining the criteria that the system uses to determine when to activate a step.

      4) Defining when a requestor who is also an approver can approve his/her own training requests.

3. Register the transaction that triggers approval processing on the Register Transactions page.

   The approval transaction registry is the interface you use to register a transaction with the Approval Framework.

4. Define workflow notification options on the Configure Transactions page.

5. Define approval authorization by role or user on the Approval Authorization page.

Enterprise Learning Approval Process Setup

In Enterprise Learning Management you associate approval process definitions with courses, classes, programs, and supplemental learning types using the Approval Type field on the Maintain Courses (LM_CI_LA_CMP), Maintain Classes (LM_ACT), Maintain Programs (LM_PROG), and Define Supplemental Learning (LM_ADHC_SETUP) components. When a learner, manager or administrator submits an enrollment request for a class, program, or supplemental learning that requires approval, the system initiates the sequence of paths and steps contained in that process definition.

This topic describes how to configure the system to use the sample approval process definitions as well as any process definitions that you create yourself.

Important! To use the sample approval processes created by PeopleSoft, new install customers must import them into their production environments by running the LMAP01.DMS script with the LMAP01.DAT file.

Note: Enrollment, program registration, and supplemental learning requests do not *automatically* trigger approval workflow. You must specify approval requirements when you define Courses, Programs, and Supplemental Learning templates on the Maintain Courses (LM_CI_LA_CMP), Maintain Classes (LM_ACT), Maintain Programs (LM_PROG), and Define Supplemental Learning (LM_ADHC_SETUP) components.

To configure approvals in Enterprise Learning Management:

1. Select the Class Enrollment and Supplemental Learning check boxes on the Enrollment Defaults page of the Install Defaults component (LM_IN_DFLT_CMP) to enable approval processing for enrollment and supplemental learning requests.

   Note: If you do not select these options, the Approval Type field on the Item Details, Class Details, and Supplemental Learning Request pages is still available. However, when an enrollment or supplemental learning request is submitted, the system bypasses the approval framework and the enrollment/supplemental learning is immediately confirmed.

   See Defining Default Processing Rules and Options.

2. Select the Program Registration check box on the Program Defaults page of the Install Defaults component (LM_IN_DFLT_CMP) to enable approval processing for program registration requests.

   Note: If you do not select this option , the Approval Type field on the Program Details page is still available. However, when a registration request is submitted, the system bypasses the approval framework and the registration is immediately confirmed.

   See Install Defaults – Programs Page.

3. Select a SETID for approvals on the Basic Data page of the Learning Environment component (LM_LE_CMP).

   The SETID determines which approval process definitions are available in the Approval Type field on the Item Details, Class Details, Program Details, and Supplemental Learning Details pages.

Note: When you create approval process definitions, you tie these definitions to specific SETIDs. The SETID is then used to control which of these definitions are available within a specific learning environment.

See Defining Learning Environments.

4. Associate approval process definitions with courses, classes, programs, and supplemental learning types using Approval Type field on the following components:

   - Maintain Courses (LM_CI_LA_CMP)
   - Maintain Classes (LM_ACT)
   - Maintain Programs (LM_PROG)
   - Define Supplemental Learning (LM_ADHC_SETUP)

   When a learner enrolls in and class, registers for a program, or submits a supplemental learning request , the system uses the associated approval process to route the approval requests to the required approvers.

   See Assigning Objectives to Courses and Programs.

   See Defining Class Details.

   See Building Learner Groups.

   See Setting Up Supplemental Learning Types.

Note: You define approval process definitions using the Setup Process Definitions component (EOAW_PRCS).

Note: We discuss the pages used to enroll in classes, programs, and supplemental learning, and the pages used by managers and administrators to review and approve enrollment requests, in other topics. See Understanding Learning Record and Objectives Management and Approving Enrollment and Registration Requests.

Setting Up User Lists

To define user lists, use the User List (EOAW_USER_LIST) component.

Page Used to Set Up User Lists

Page Name	***Definition Name***	***Usage***
User List Definition Page	EOAW_USER_LIST	Create and maintain user-list definitions.

For more information on user lists, see the product documentation for *PeopleSoft Approval Framework*.

Setting Up Approval Process Definitions

Approval process definitions define the steps that must be followed to approve a transaction, and the approvers for each step.

To define approval processes, use the Process (EOAW_PRCS) component.

Pages Used to Set Up Approval Process Definitions

Page Name	***Definition Name***	***Usage***
Setup Process Definitions Page	EOAW_PRCS_MAIN	Define the sequence of stages, paths, and steps that make up an approval process.
Criteria Definition Page	EOAW_CRITERIA	Define criteria for activating a stage, path, or step.
Approval Path Definition Page	EOAW_PATH_SEC	Define the details of a specific approval path.
Approval Step Definition Page	EOAW_STEP_SEC	Define the details of a specific step in an approval path.

For more information on approval process definitions, see the product documentation for *PeopleSoft Approval Framework*.

Setting Up the Transaction Registry

To set up the transaction registry, use the Transaction Registry (EOAW_TXN) component.

Page Used to Define the Approval Transaction Registry

Page Name	***Definition Name***	***Usage***
Register Transactions Page	EOAW_TXN	Register a transaction with the Approval Framework.

For more information on the approval transaction registry, see the product documentation for *PeopleSoft Approval Framework*.

Understanding the Transaction Registry

The approval transaction registry is the interface application that developers use to register an application with the Approval Framework. Transactions that require approvals are candidates for being linked to

Approval Framework. You use the Register Transactions page to link the components, event handler, records, and classes that you created into the approval process for an application transaction, such as a requisition or purchase order. Application developers register the main records and components that make up the transaction, then functional business analysts select the approval transaction on which to base the approval process definition.

Note: Enterprise Learning Management delivered approvals are already recorded in the Approval Transaction Registry. No additional configuration is necessary.

Prerequisites for Registering a Transaction

Before defining the transaction registry:

1. Create a Transaction Handler Application Class which extends an approved event handler class delivered by approval workflow.
2. Create notification templates for the events to include approval and denial for headers and for line levels.
3. Create transaction data sources, as needed.

Configuring Approval Transactions

Use the Configure Transactions page to select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification. Notifications are mapped to work with the approval transaction registry and include menus and components and SQL definitions.

To configure approval transactions, use the Configure Transactions (EOAW_TXN_CONFIG) component.

Page Used to Configure Approval Transactions

Page Name	***Definition Name***	***Usage***
Configure Transactions Page“Configure Transactions Page” (Approval Framework)	EOAW_TXN_NOTIFY	Use the Configuration Transactions page to configure how the system uses the particular implementation of approval triggers.

Setting Up Approver Authorization

To set up approver authorizations, use the Authorize Approvers (EOAW_AUTH) component.

Pages Used to Set Up Approver Authorizations

Page Name	***Definition Name***	***Usage***
Approval Authorization Page	EOAW_AUTH	Authorize roles and approvers for dynamic paths.
Criteria Definition Page	EOAW_CRITERIA	Define criteria for the workflow approver.
Setup Process Definitions Page	EOAW_PRCS_MAIN	Define approval process stages.
Approval Path Definition Page	EOAW_PATH_SEC	Set up workflow approval paths.
User List Definition Page	EOAW_USER_LIST	Set up list of users for workflow approval.
User Profile Page	USER_GENERAL	Set up user IDs and assign roles.

For more information on approver authorizations, see the product documentation for *PeopleSoft Approval Framework*.

Understanding Approver Authorizations

You can identify the approval authorization by role or user in conjunction with a dynamic step. To accomplish this, the Approval Framework selects the appropriate supervisory approver from the user list and verifies that the approver meets the criteria for authorization.

You establish approval authorizations for each transaction. The authorization can accommodate approvals by role or user ID.

You can set authorization across **Definition IDs,** which are defined on the Setup Process Definition page.

For each authorization, the system checks the specific user ID to see if that individual can authorize the transaction. If found, it checks the authorization criteria. If criteria are met, the user has authorization.

If no authorization is found for a specific user ID, then the system looks for role-based authorizations using the approval hierarchy.

For approval hierarchy, the system first looks for authorization by Definition ID. If no authorization is found, the system then seeks authorization for rows without a Definition ID. If no authorization approval criteria is matched, the system process is deemed Not Authorized.

You can establish dynamic authorizations for either the header or line level, but not both.

When workflow is initiated for a change order or requisition, the system compares the approval authorization data to the user list to verify the approval process. To verify the approval, the system:

1. Checks the user list and assigns the first approver to the first user that is returned.

2. Looks at the roles that are established for the user ID.
3. Identifies the approval limits that are set for that user ID.
4. Routes the requisition status to the first approver if the amount is satisfied for the requisition and the approver list is complete.
5. Continues to look for additional approvers until all conditions are met.
6. Routes the approval to the administrator if the approver criteria is never met.

Using PeopleSoft Fluid User Interface Self-Service Approval Transactions

The PeopleSoft Approvals feature provides a way for approvers to take Application Workflow Engine (AWE) actions on PeopleSoft transactions pending their approval, but can do so using any form factor.

PeopleSoft Mobile Approvals

For more information on PeopleSoft Fluid User Interface, see Understanding PeopleSoft Fluid User Interface Home Pages.

These topics provide an overview of fluid versus MAP approvals, how to access the Approvals pages, and discuss how to use PeopleSoft Fluid User Interface manager self-service approval transactions.

Related Links

"Using the PeopleSoft Fluid User Interface to Work with Approvals" (Enterprise Components)

Pages Used for PeopleSoft Fluid User Interface Manager Self-Service Approval Transactions

Page Name	***Usage***
Approvals Tile (Fluid Approvals)	Review pending and historical approval requests that are associated with the logged-in manager using Fluid Approvals technology.
Approvals Tile (MAP Approvals)	Review pending and historical approval requests that are associated with the logged-in manager using MAP technology.
Pending Approvals Page	Lists pending approval requests requiring the attention of the logged-in manager.
Filter Page	Apply one or more filters to narrow your pending approvals list.

Page Name	***Usage***
Pending Approvals - Learning Page (MAP Approvals)	Review the approval request details, enter a comment, and approve, deny, or push back the request.
Approvals History Page	Lists approvals you have worked on in the past.
Approvals History - Learning Page (MAP Approvals)	View details about an approval request you have already worked on.

Understanding Approvals and Using Fluid Vs. MAP

Mobile Approvals provides a convenient option to review and approve pending transactions.

In order to use the mobile Approvals feature, applications must utilize the Approval Framework, also known as Approval Workflow Engine (AWE). All transactions must be created in the database, and adhere to the Approval Framework logic and configuration within each application.

Currently PeopleSoft ELM uses two technologies to support approval processing through the use of the fluid pages:

- Enterprise Components - Fluid Approval Framework technology

  This technology consists of; Enterprise Objects Approval Workflow (EOAW), Application Workflow Engine (AWE), and Enterprise Objects Page Composer (EOPC). A minimum tools release of 8.54 is required for Fluid Approvals.

  Requires Tools Release: PeopleTools 8.54.27 and higher OR PeopleTools 8.55.10 and higher.

- PeopleTools - Mobile Approval Platform (MAP) technology

  This framework uses a template-layout approach for building mobile applications.

Important! When implementing Fluid Approvals, all users within the same pillar must be using Fluid Approvals. Oracle does not support a mix of MAP Approvals and Fluid Approvals within the same pillar environment.

For more information on Enterprise Components - Fluid Approval Framework technology, see “Using the PeopleSoft Fluid User Interface to Work with Approvals” (Enterprise Components).

For more information on the Mobile Application Platform, see *PeopleSoft PeopleTools,* “Mobile Application Platform.”

Understanding How to Access the Approvals Pages

When using a mobile device, you can access the approvals pages by clicking the Approvals tile from the Manager Self Service home page. In the PeopleSoft Classic User Interface, access the Approvals tile by selecting the Fluid Home menu option, then access the Manager Self Service home page. You can also select the Notification flag icon at the top of either the fluid or classic PeopleSoft pages to view alerts in a notification window.

PeopleSoft Mobile Approvals

When you access the approvals pages by clicking the Approvals tile, the page defaults to the Pending Approvals page. The application enables you to switch between these approval views (by clicking the Action Menu drop-down icon to access either of these pages):

- Pending Approvals

  An approver can view transactions pending their approval under one interface, thus eliminating the need to go to several different components to look for pending approvals. The Pending Approvals page groups pending approvals by type, date received, from (last sender), and person; filter pending approvals by type, date, and from; display details of each approval request, including the approval chain; and provide AWE actions like Approve and Deny.

- Approvals History

  An approver can also view approval requests that they already worked on. This functionality enables the user to view the status of the approval request in the approval chain and also view any comments by individuals within the chain. The administrator can define how far in the past historical approvals can be retrieved and viewed.

This example illustrates how to select approval pages from the actions list within the Approvals pages.

Note: The Approval pages may display slightly different depending on if you are using a smartphone, tablet, and if you are holding your device in landscape or portrait mode.

Approvals Tile (Fluid Approvals)

Use the Approvals tile to review pending and historical approval requests that are associated with the logged-in manager using Fluid Approvals technology.

Navigation:

Select **Fluid Home** under the main menu. On the page that appears, select **Manager Self Service.** The Approvals tile is available on the Manager Self Service landing page.

As a manager, you can add the tile, through personalization, to a system-delivered home page or a home page that you create.

This example illustrates the Approvals tile.

The tile shows the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

Click the tile to access the Pending Approvals and Approvals History pages without using traditional menu navigation to review and approve different transactions.

The Approvals pages support approvals that use AWE.

Approvals Tile (MAP Approvals)

Use the Approvals tile (HMAP_APPR_TILE_FL) to review pending and historical approval requests that are associated with the logged-in manager using MAP technology.

Navigation:

Select **Fluid Home** under the main menu. On the page that appears, select **Manager Self Service.** The Approvals tile is available on the Manager Self Service landing page.

As a manager, you can add the tile, through personalization, to a system-delivered home page or a home page that you create.

This example illustrates the Approvals tile.

The tile shows the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

Click the tile to access the Pending Approvals and Approvals History pages without using traditional menu navigation to review and approve different transactions.

The Approvals pages support approvals that use AWE.

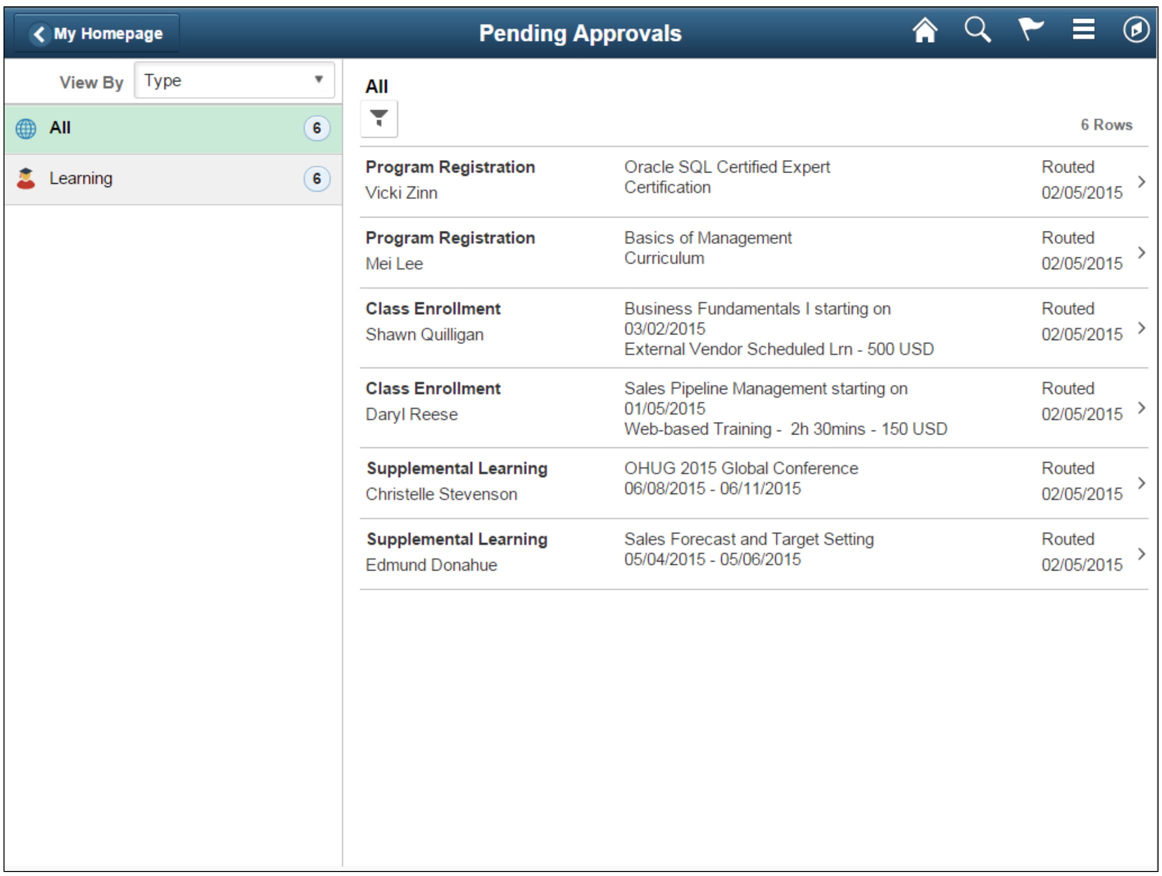
Pending Approvals Page

Use the Pending Approvals page to review and act on pending approval requests requiring the attention of the logged-in manager.

Navigation:

Click the Approvals tile on the Manager Self Service home page.

This example illustrates the fields and controls on the Pending Approvals page.



This page displays vertical tabs that group approval transaction types into categories that are defined by the **View By** type value that you select. The *All* category type appears at the top of the list for all view types when there are pending transactions. Transaction categories within a **View By** type display a badge identifying the number of pending approvals for that transaction category. If you do not have any pending approvals for a transaction category, this page displays a message that reads "You have no pending approvals at this time."

Note: If you are viewing this page in portrait mode on your mobile device, the page displays an arrow on the left side of the page. Click this arrow to reveal or hide the transaction category tabs.

Click a transaction category tab to display the pending approvals associated with that category. When you click a transaction category, the page displays pending approvals sorted by the date on which the approval request was received, with the oldest pending approval displaying first.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>View By</td><td>Select how you want the page to display approval requests. You can group pending approvals by these view options:

Type (default view when you access the Approvals tile)

Groups approval requests by transaction type. For example, you can display all transaction types in one list, or select a specific transaction type.
Date Routed

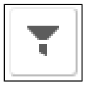
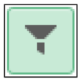
Provides a weekly grouping of pending approvals based on the date the approval was sent to you. Category tabs may include:

All (shows all pending approvals)
This Week (start of the current week until the current day)
Last Week (start of last week to the end of last week)
2 Weeks Ago (start of the week before last to the end of the week before last)
Older (anything before the start of the week before last)

Note: Define the first day of the week by using the classic PeopleSoft pages to navigate to My Personalizations > Personalize Regional Settings, and selecting the First day of week value.
From

Groups pending approvals by the last sender. The last sender could be either the requester of the transaction or the last approver in the approval chain. If the last approver step in the approval chain has multiple approvers, the name of the last person who approved the request is displayed.
Person

Shows a list of all persons for which there are pending approvals. The transaction category tabs also list a No Person Associated category when there are pending approvals that are not related to a person.
</td></tr>
</table>

Field or Control	*Description*
 **Filter** or  **Filters applied** icons	Click this icon to access the Filter Page and select from one or more criteria to narrow the pending approval list. The Filter icon appears green when filters have been applied to your search.

The transaction list displays:

1. The learning transaction name along with the learner with whom it is associated.
2. A short description listing basic details for the approval request.
3. The date on which the request was routed to you.

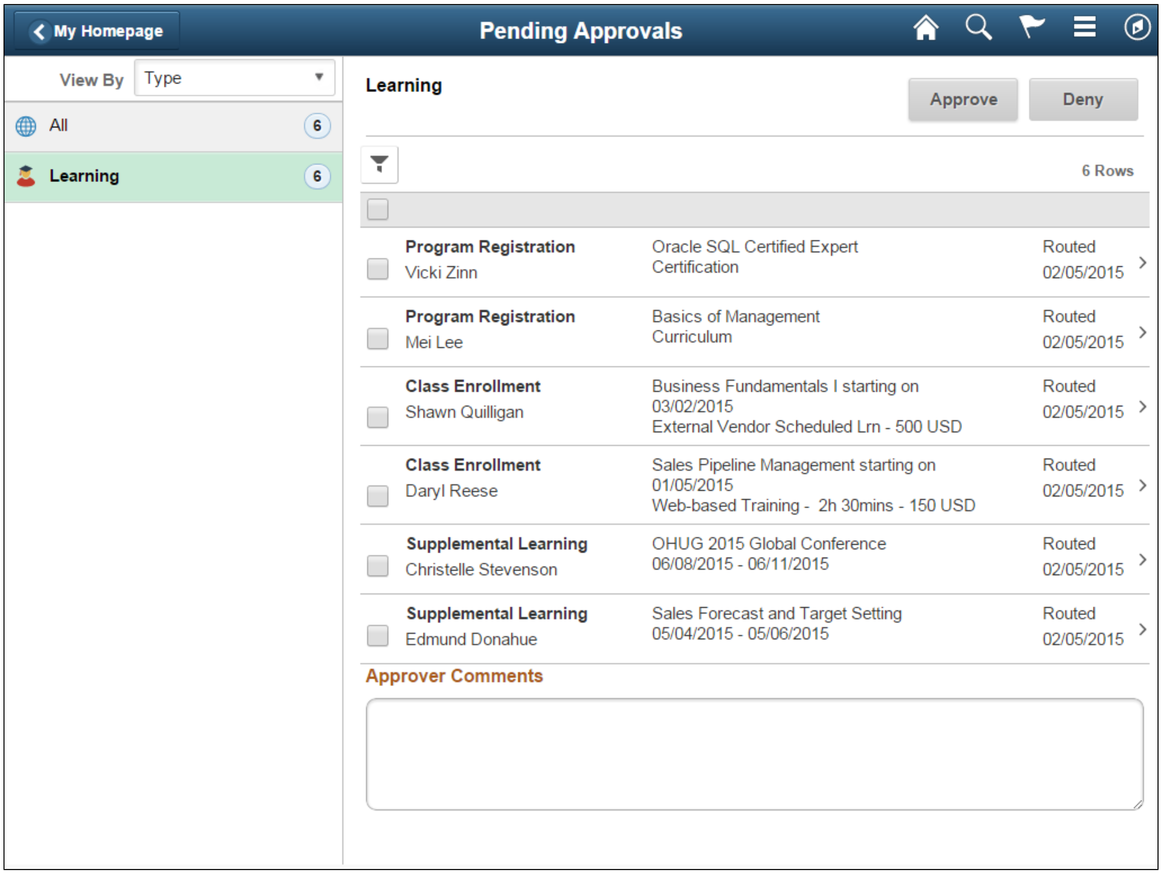
Field or Control	*Description*
 **Pushed back by** icon	Displays for a transaction if you have approved a request and the person next in the approval chain pushes back the approval. The name of the person who pushed back the request appears after this icon. **Note:** Requests that have been pushed back are not forwarded to the next person in the approval chain. Rather, the request is sent back to the previous person in the approval chain, or to the requestor if the push back occurred with the first approver, and will be pending that person's action.

Selecting a Transaction Type Category that Permits Mass Approvals

When you click a transaction type category, the application displays the pending approval items associated with that category. The page appears differently when a transaction type has been set up to allow mass approvals. When the transaction type category is not set up to allow mass approvals, the page lists the approval request transactions and no action can be take from the page. For these types of transactions, you must click the desired approval request row to access the Pending Approvals - Learning Page (MAP Approvals), where you can review and complete the approval request.

Note: PeopleSoft Enterprise Learning Management is delivered with Mass Approvals disabled.

This example illustrates the Pending Approvals page when a transaction category has been set up to have mass approvals enabled on the“Mobile Approval Options - Transactions Page” (Enterprise Components).



When the administrator has configured the transaction to allow mass approvals, you can take action (for example approve, deny, or push back) on more than one approval request within the same category at the same time. Perform mass approvals by selecting the check box before each item and clicking the appropriate action button on the page. Select or deselect all check boxes at once by clicking the top check box in the gray header.

If you do not wish to apply the same response to all transaction requests, or want to view individual details for each request, click a row to access the Pending Approvals - Learning Page (MAP Approvals)

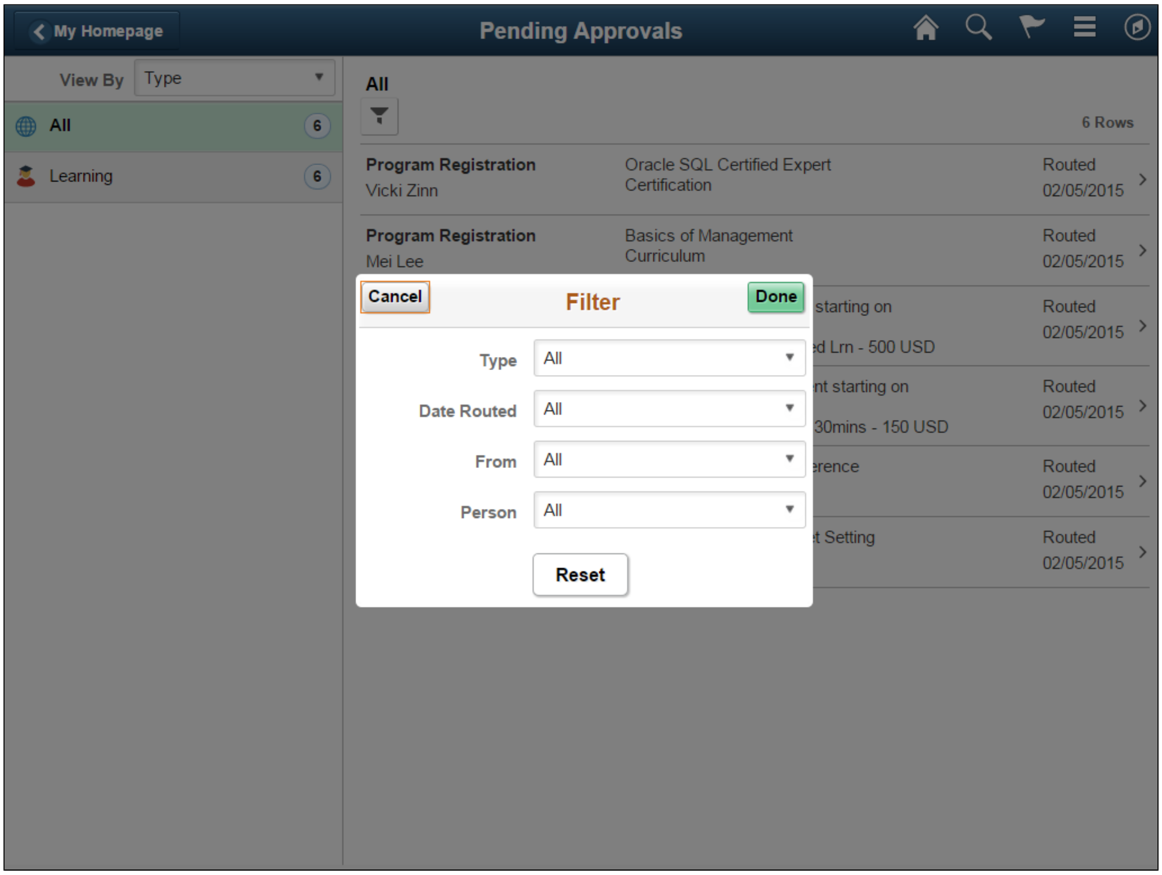
Filter Page

Use the Filter page to apply one or more filters to narrow your pending approvals list to those requests that meet your criteria.

Navigation:

Click the **Filter** funnel icon at the top of the Pending Approvals or Approvals History pages.

This example illustrates the fields and controls on the Filter page.



Use this page to identify specific categories from one or more **View By** values. The page displays only those fields and categories that apply to your existing pending approvals.

Field or Control	***Description***
Cancel	Click this button to return to the Pending Approvals or Approvals History page.
Done	Click this button to apply the filters and refine the approval request results on the Pending Approvals or Approvals History page. The Filter icon on the Pending Approvals or Approvals History page changes to green to indicate that there are filters in effect.
Reset	Click this button to reset the filter fields to the default value.

Pending Approvals - Learning Page (MAP Approvals)

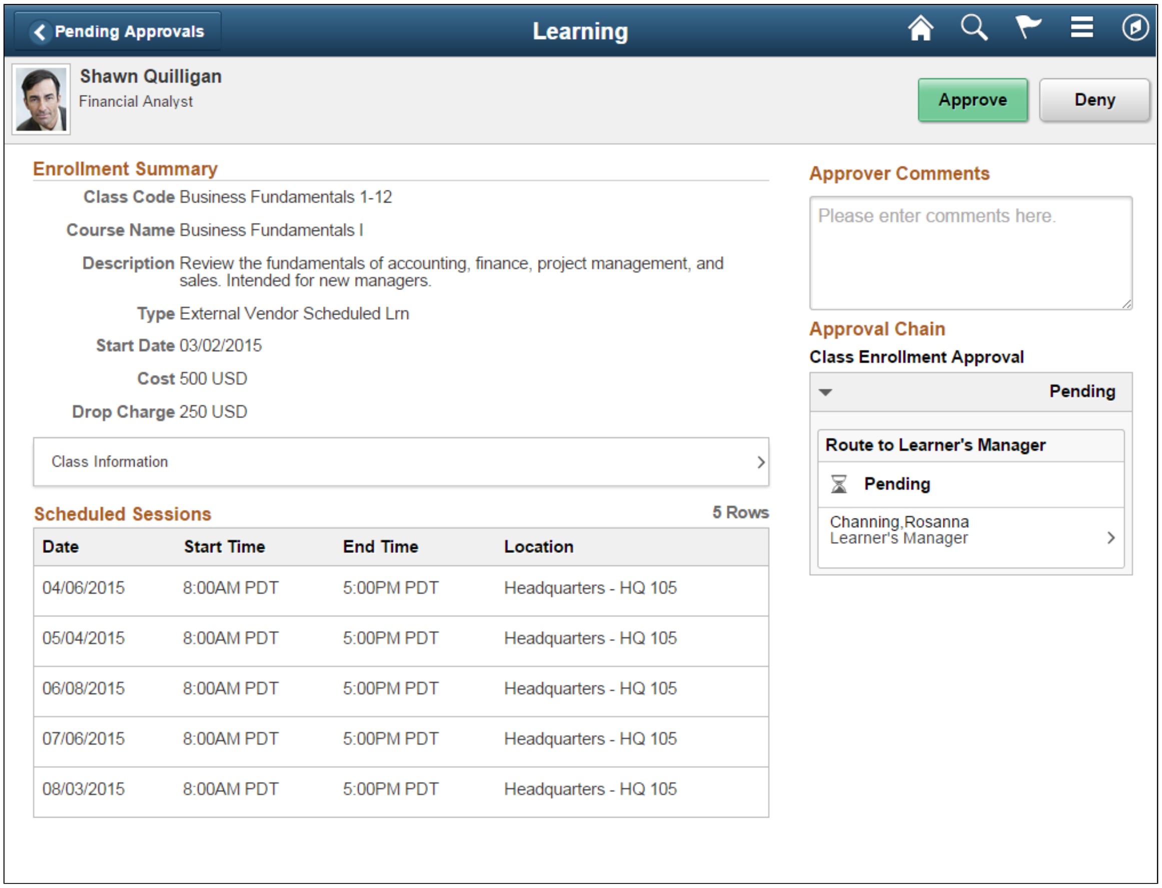
Use the Pending Approvals - Learning page to review the approval request details, make a comment, and approve, deny, or push back the request.

Note: This is the page that you access through the MAP Approvals tile. For information on the pages accessed through the Fluid Approvals tile, see Approving Learning Transactions Using Fluid Approvals.

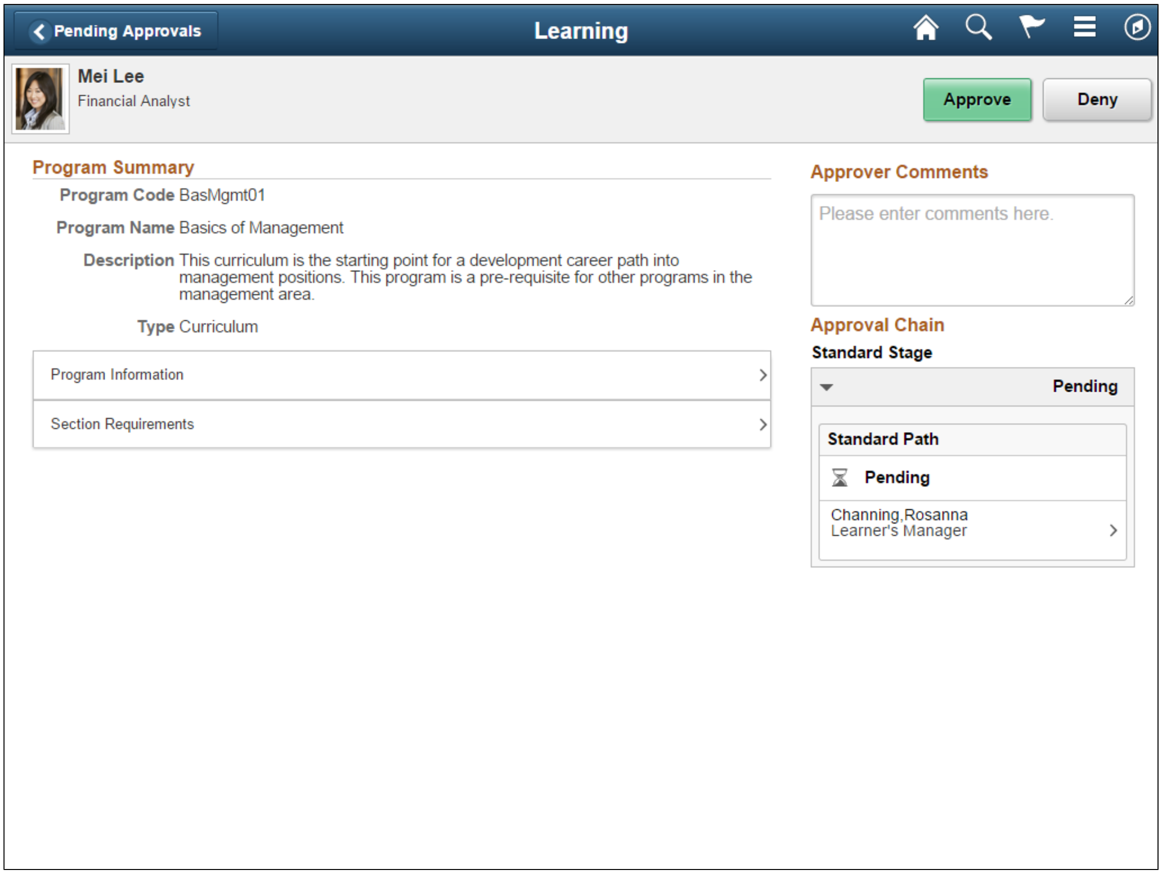
Navigation:

Click an individual approval request transaction from the Pending Approvals page.

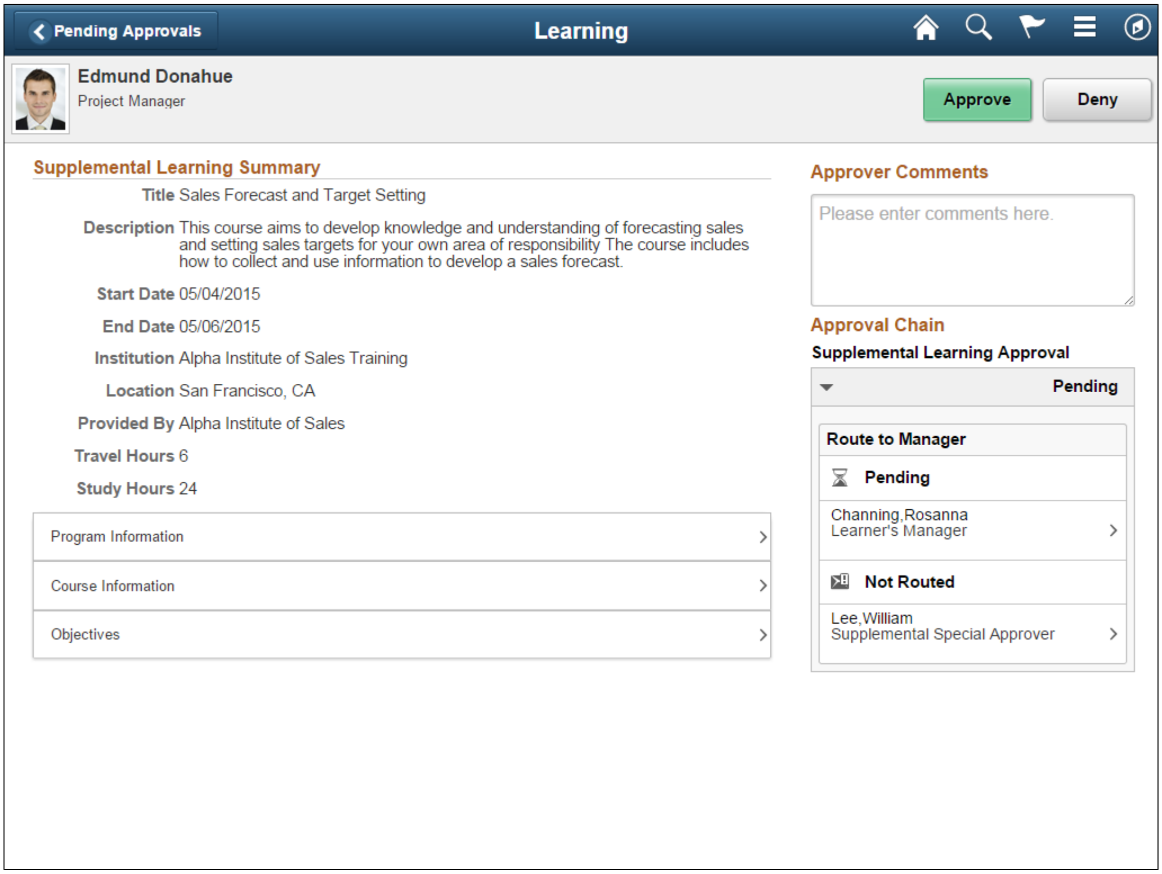
This example illustrates the fields and controls on the Pending Approvals - Learning page for classroom enrollments.



This example illustrates the fields and controls on the Pending Approvals - Learning page for program registrations.



This example illustrates the fields and controls on the Pending Approvals - Learning page for supplemental learning.



Click the arrows on the page to expand a section and view additional details about the person, request, or approval chain. If more than one person is in the approval chain, the page will list all approvers, with the first approver on the top.

The buttons that are available on the page are determined by the “Mobile Approval Options - Transactions Page” (Enterprise Components). Buttons may include:

- **Approve**
- **Deny**

Field or Control	***Description***
Approver Comments	Enter any comments you want to add for the approval request.

When you approve, deny, or push back a transaction, the system will present you with a summary page, asking for a confirmation on the action you want to take. You can then submit or cancel your transaction request. If you submit the request, the transaction will be removed from you Pending Approvals queue and moved to your Approvals History Page.

Information Displayed for Classroom Enrollments

Field or Control	*Description*
Enrollment Summary	This section of the page displays the following information for the class: • Class Code • Course Name • Description • Type (delivery method) • Start Date • End Date • Duration • Cost • Drop Charge **Note:** If any of these parameters are not defined for a class, they are not displayed in the Enrollment Summary. For more information on defining class details, see Understanding Management of Classes.
Class Information	Click to view the following class information: • Course Abstract • Objectives Met • Required Prerequisites • Recommended Prerequisites **Note:** This information is defined at the course level. If any of this information is not defined for a course, it does not appear when you click **Class Information**. For more information on defining course details, see Creating Courses.

Field or Control	*Description*
Scheduled Sessions	This section of the page lists all of the scheduled sessions for the class being requested. For each session, the page displays: • Start Date • Start Time • End Time • Location If there are no scheduled sessions for the class being requested, this section does not appear on the page. For more information on scheduling sessions, see Understanding Sessions, Webcasts, and Assignments.

Information Displayed for Program Registration

Field or Control	*Description*
Program Summary	This section of the page displays the following information for the program: • Program Code • Program Name • Description • Type (*Certification* or *Curriculum*) • Validity **Note:** The Validity field appears only for certifications that have a validity period defined.

Field or Control	*Description*
Program Information	Click to view the following program information: • Abstract • Contact (program coordinator) • Objectives Met • Required Prerequisites • Recommended Prerequisites **Note:** If any of this information is not defined for a program, it does not appear when you click **Program Information**.
Section Requirements	Click to view the following section requirement information: • Section Name • Course or Program Name • Required (yes or no) • Credit Allowed **Note:** If there are no section requirements defined for a program, **Section Requirements** does not appear on the Pending Approvals - Learning page.

For more information about defining program details, see Defining Programs.

Information Displayed for Supplemental Learning

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Supplemental Learning Summary</td><td>This section of the page displays the following information for the supplemental learning:
Title
Description
Start Date
End Date
Institution
Location
Provided By
Supervised By
Travel Hours
Study Hours
Currency Code
Education Units
Price
Free Field One
Free Field Two
Free Field Three
Free Field Four
Instructions
Note: If any of these fields are not defined for a supplemental learning, they do not appear in the Supplemental Learning Summary.</td></tr>
</table>

Field or Control	*Description*
Program Information	Click to view the following information about programs associated with the supplemental learning: • Program Name • Program Description **Note: Program Information** is available only if programs have been added to the supplemental learning.
Course Information	Click to view the following information about courses associated with the supplemental learning: • Course Name • Course Description **Note: Course Information** is available only if courses have been added to the supplemental learning.
Objectives	Click to view the following information about objectives associated with the supplemental learning: • Objective Code • Objective Name • Description • Proficiency **Note: Objectives** is available only if objectives have been added to the supplemental learning.

For more information on defining supplemental learning, see Adding and Editing Supplemental Learning.

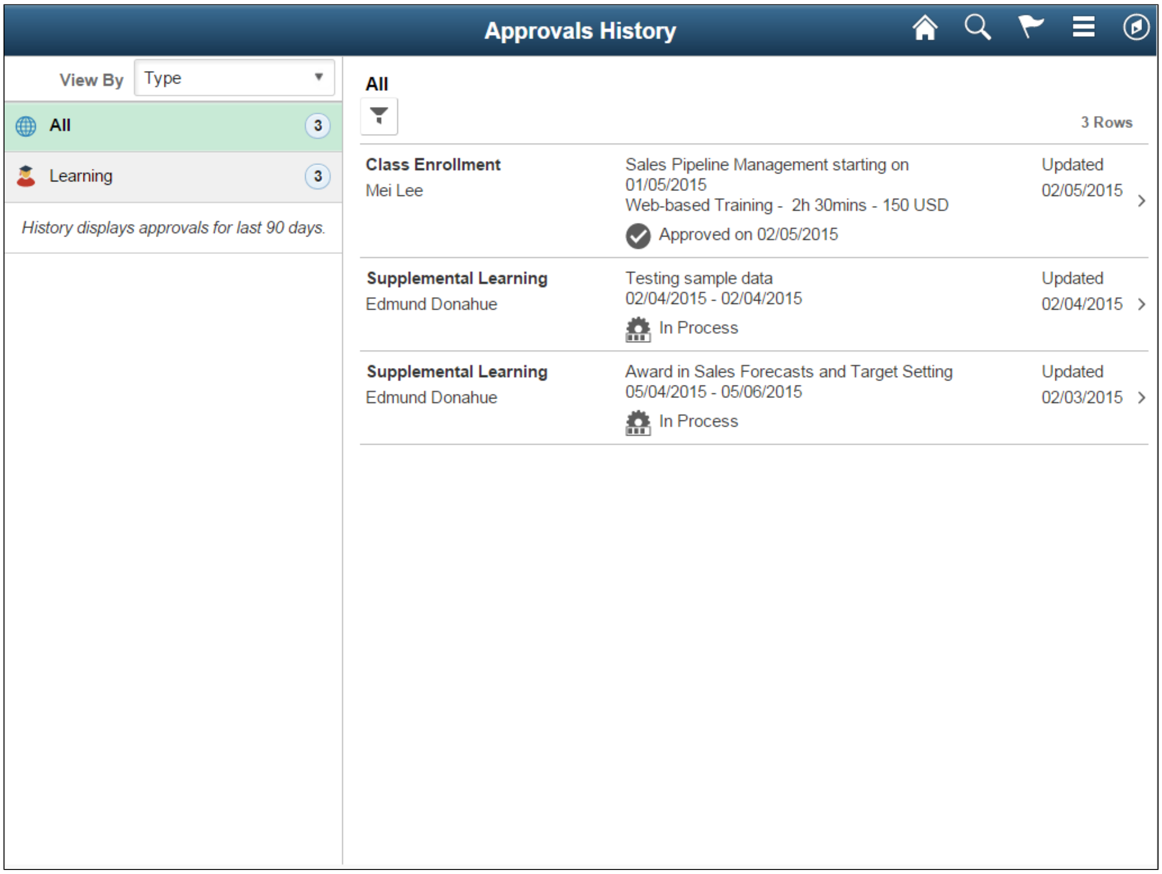
Approvals History Page

Use the Approvals History page to view approvals you have worked on in the past.

Navigation:

Click the Approvals tile on the home page, then select the Approvals History item from the Action Menu drop-down list (located in the banner) from the Pending Approvals page.

This example illustrates the fields and controls on the Approvals History page.

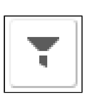
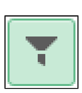


The Approvals History page shows approval transactions you have addressed in the past. How far back you can view historical approval transactions is defined by the administrator on the "Mobile Approval Options - General Settings Page" (Enterprise Components). This page then displays a message below the category tabs indicating the time period for which history is displayed.

This page displays vertical tabs that group approval transactions into categories defined by the **View By** type that you select. The *All* category appears at the top of the list for all view types when there are historical approval transactions. Categories within a **View By** type display a badge identifying the number of historical approvals for that category. If you do not have any historical approvals for a category within the designated time period, the tab does not appear in the list.

Note: If you are using the approvals pages in portrait mode on your mobile device, the page displays an arrow on the left side of the page. Click this arrow to reveal or hide the category tabs.

Click a category tab to display the historical approvals that apply to that category. When you click a category, the page will display historical approvals sorted by the date on which that last person updated or took action on the request, with the most recently updated approvals displaying first.

Field or Control	***Description***
View By	Select how you want the page to display historical approval requests. You can group historical approvals by these view options: • *Type* (default view when you access the page) Groups approval requests by transaction type. For example, you can display all transactions types in one list, or select a specific transaction type. • *Status* Displays a list that may show the following status categories • **All** (contains all approvals that have been worked on within the historical display days) • **In Process** (contains the approvals that are being worked on but have not gone through the approval chain to completion) **Note:** If a higher level approver pushes a transaction back, the transaction will show up on the Pending Approvals page for the user that sent him or her the request. However, for the person that pushed back the request, it will show up in his or her Approvals History page with a status of *In Process.* • **Approved** • **Denied** • **Terminated** • *From* Groups historical approvals by the last sender. The last sender could be either the requester of the transaction or the last approver in the approval chain. • *Person* Shows a list of all persons for which you have worked on an approval within the defined historical time frame. The category tabs also list a *No Person Associated* category when there are historical approvals that are not related to a person.
 **Filter** or  **Filters applied** icons	Click this icon to access the Filter Page and select from one or more criteria to narrow the historical approval list. The Filter icon appears green when filters have been applied to your search.

The transaction list displays:

1. The learning transaction name along with the learner with whom it is associated.

2. A short description listing basic details for the approval request along with its status.

3. The date upon which the request was last updated.

Click a specific transaction to access the Approvals History - Learning Page (MAP Approvals).

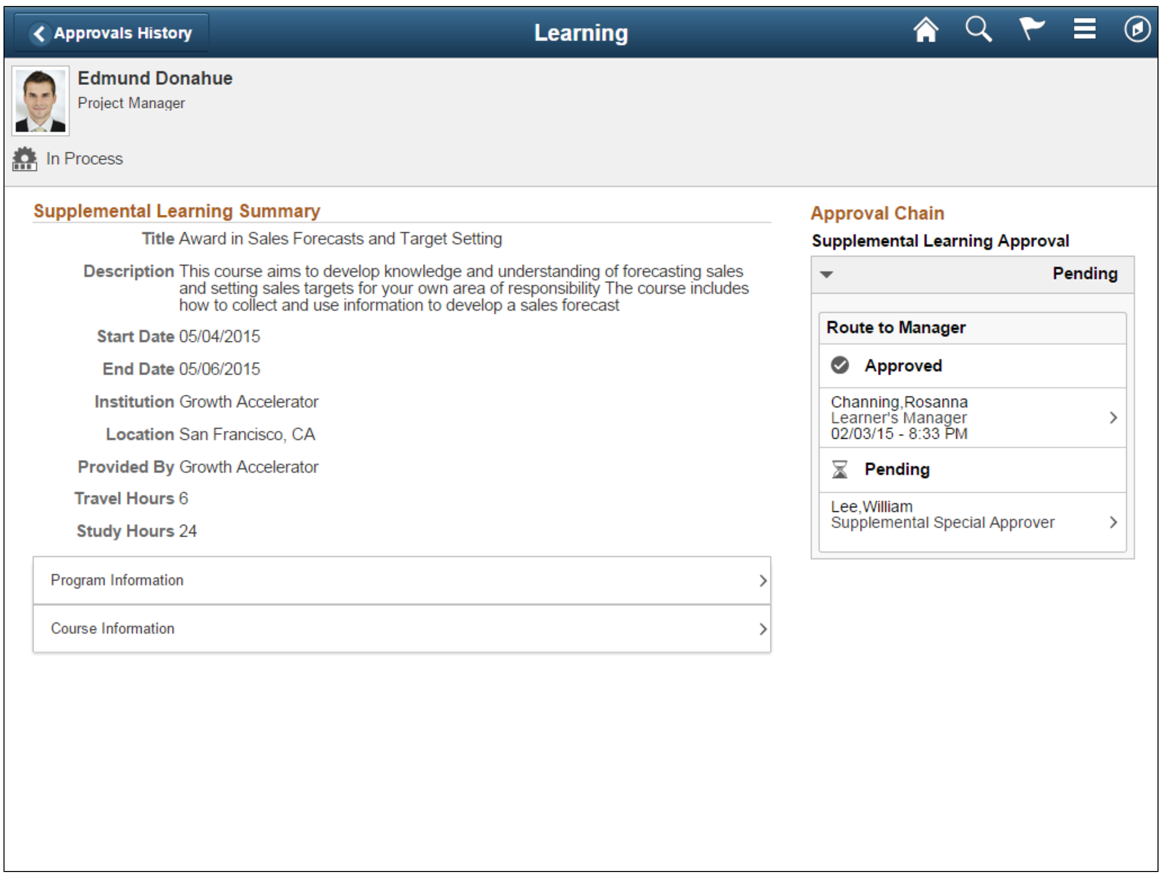
Approvals History - Learning Page (MAP Approvals)

Use the Approvals History - Learning page to view details about an approval request you have already worked on.

Navigation:

Click an individual approval request transaction from the Approvals History page.

This example illustrates the fields and controls on the Approvals History - <Transaction Details> page for the tablet.



Use the arrows and links on this page to expand sections or access additional pages to view further details about the request. The fields that appear on this page function in the same way as their equivalents on the Pending Approvals - Learning Page (MAP Approvals).

Chapter 10

Setting Up Objectives

Understanding Objectives

Learning objectives, often called learning goals in many businesses, enable you to target and recommend learning for an individual. When you set up learning objectives in Enterprise Learning Management:

- The system can assign objectives to learners based on their position or job requirements.
- Managers can assign objectives to team members, learners can self-assign objectives; and administrators can assign objectives to groups of learners.
- Learners can search the catalog for classes and programs that meet specific objectives.
- The system can track learner progress toward meeting objectives and maintain a history of each learner's met objectives.

You can import objectives from a human resources application, such as PeopleSoft HCM or you can define objectives manually in Enterprise Learning Management. If you use PeopleSoft HCM, objectives represent the difference between the learner's actual competencies and the competencies that are required for the learner's job or position as defined in the human resources system.

Enterprise Learning Management delivers EIPs for importing competency and related proficiency levels (ratings) for both job roles and people from PeopleSoft HCM. After you import the data, the system performs a gap analysis by comparing the learner's current competencies to those associated with the learner's profile—for example, competencies linked to the job position or based on manager feedback through PeopleSoft Enterprise ePerformance—and presents a list of needed objectives.

When you associate objectives with classes and programs, the learner can search the catalog to locate and enroll in the classes or programs that fulfill the outstanding objectives. Upon completing the class or program, the system updates the learner's enrollment record by marking the objective as *Met.* If the source of the learning objective is a PeopleSoft HCM competency, an outbound EIP message sends the competency information back to PeopleSoft HCM. A subscription message in that application updates the learner's competency and proficiency levels.

Note: The delivered EIPs are designed to interface seamlessly with PeopleSoft HCM. Some modifications are necessary to use the EIPs with other applications.

Objective Statuses

Objectives have statuses that indicate a learner's progress for each objective. These statuses appear on several of the employee and manager self-service pages.

This table describes objective statuses:

Status	***Description***
Needed	Learner is assigned the objective.
In progress	Learner is enrolled in a class or registered in a program that satisfies a needed objective requirement.
Met	Learner has completed a class, program, or supplemental learning that satisfies the objective requirement.

Methods of Associating Objectives with Learning

You can assign learning objectives to courses and to programs. You can also enable self-service users to select an objective to get credit for when reporting supplemental learning. The most common way for learners to meet objectives is to complete classes and programs to which objectives are mapped.

Objectives can also be assigned as prerequisites to courses and programs.

Rating Models

A rating model defines the values that can be used to rate a learner's performance or level of proficiency for a learning objective—for example, poor, fair, average, good, and excellent. The use of rating models is optional.

For each rating model, you can specify values for proficiencies, review points, and numeric ratings. The system uses these values to determine the learning gap, which is the difference in what a learner should know to perform the job role (job code or position) and what the learner currently knows.

When a rating model is associated with an objective, users must specify a proficiency level whenever they select the objective. For example, when assigning an objective to a course or to a learner, the user must specify the proficiency level of the objective.

Global Objectives

Global objectives represent organizational level learning goals that you define specifically for use with a formal training plan. In Enterprise Learning Management, you can use training plans to plan or estimate the demand for learning for a specified period of time. When you generate a training plan report, the report can detail learning demands by global objective.

To set up global objectives, use the Define Learning Objectives component. You can then assign global objectives to courses using the Courses - Attributes page.

Related Objectives

In PeopleSoft HCM, when you define sub-items in the content catalog, you create an association between the sub-item and its parent item. The system uses this association to drive the processing for the entry of sub-items into a profile. The most common use of sub-items is as sub-competencies for a parent competency. When you add a competency profile item, you can then add one or more related sub-competencies to that profile.

When you import objectives from PeopleSoft HCM to PeopleSoft ELM, you import both parent items and sub-items. PeopleSoft ELM maintains that parent-child relationship by designating these sub-items as related objectives.

When a learner meets both parent and related objectives, the PeopleSoft ELM system sends these met objectives to your PeopleSoft HCM system and adds them as content items to the appropriate person profile.

For more information on related objectives, see the product documentation for the following pages:

- Objectives Page
- Maintain Courses - Attributes Page
- Maintain Programs - Attributes Page

Related Links

Understanding Supplemental Learning
Course Details: Prerequisites Page
Maintain Programs - Prerequisites Page
Understanding Training Plans

Understanding Objective and Profile EIPs

Enterprise Learning Management provides incoming EIPs for importing the following profile data from PeopleSoft HCM:

- Rating models.
- Competencies.
- Role competencies (the set of competencies for each job code or position).
- Person competencies (the set of competencies that are specific to each learner).

Note: Enterprise Learning Management accepts only person competency messages with the evaluation type *A* (Approved/Official), *R* (Supervisor/Manager), or *S* (Self). If a learner has more than one rating for the same competency, the system imports the highest rating; however, a manager's rating takes precedence over self-assigned ratings.

Outbound EIP messages enable you to send information about a learner's met objectives to PeopleSoft HCM. The outbound EIPs publish all of the learner's met objectives and the external competencies to which they map. The EIP subscription in PeopleSoft HCM receives this data and adds it to the CM_EVALUATIONS table with an evaluation type of *L* (Learning).

Note: An additional EIP is provided for importing person objectives from an external application, such as a customer relationship management system.

See Importing Learner Objective Data from Non-PeopleSoft HR Systems.

Full Sync and Incremental Sync EIPs

Enterprise Learning Management provides EIPs for full sync and incremental sync messages. Generally, you run the full sync EIPs once when you configure the system. After you validate that data has been successfully loaded, you activate the incremental sync messages. These messages detect changes that are made to competency data in PeopleSoft HCM and ensure that data in Enterprise Learning Management and PeopleSoft HCM remains synchronized.

Inbound Competency EIPs

This table lists and describes each inbound competency EIP:

Message Name	***Message Subscription PeopleCode***	***Staging Table***	***Destination Record in Enterprise Learning Management***	***Explanation***
RATING_MODEL_FULLSYNC	HRRatingModels		LM_RTNG_MDL_TBL LM_RVW_RTNG_TBL	Subscribes to full data publish of the PeopleSoft HCM Rating Model setup table (RATING_MDL_TBL).
RATING_MODEL_SYNC	HRRatingModels		LM_RTNG_MDL_TBL LM_RVW_RTNG_TBL	Subscribes to updates that have been made to the PeopleSoft HCM Rating Model setup table.
JPM_CAT_FULLSYNC	LmCatalogSync	LM_STG_CAT_TYPE LM_STG_CAT_ITEM LM_STG_CAT_PROP	LM_CAT_TYPES LM_CAT_ITEMS LM_CAT_PROPS	Subscribes to full data publish of the PeopleSoft HCM catalog data.
JPM_CAT_SYNC	LM_CatalogSync		LM_CAT_TYPES LM_CAT_ITEMS LM_CAT_PROPS	Subscribes to updates that have been made to the PeopleSoft HCM catalog data.
JPM_JP_QUAL_FULLSYNC	LM_InstQual	LM_STG_QUAL_SET LM_STG_QUAL_INS	LM_JP_QUAL_SET LM_JP_QUAL_INS	Subscribes to full data publish of the PeopleSoft HCM instance qualifiers.

Message Name	***Message Subscription PeopleCode***	***Staging Table***	***Destination Record in Enterprise Learning Management***	***Explanation***
JPM_JP_QUAL_ SYNC	LM_InstQualSync		LM_JP_QUAL_SET LM_JP_QUAL_INS	Subscribes to updates that have been made to the PeopleSoft HCM instance qualifiers.
JPM_JP_TYPE_ FULLSYNC	LM_ProfileTypeSync	LM_STG_JP_TYPES LM_STG_JP_SECT LM_STG_JP_PROPS	LM_JP_TYPES LM_JP_SECTION LM_JP_PROPS	Subscribes to full data publish of the PeopleSoft HCM profile types.
JPM_JP_TYPE_SYNC	LM_ProfileTypeSync		LM_JP_TYPES LM_JP_SECTION LM_JP_PROPS	Subscribes to updates that have been made to the PeopleSoft HCM profile types.
JPM_JP_FULLSYNC	LM_ProfileSync	LM_STG_PROFILES LM_STG_PRF_RVAL LM_STG_JP_CT_TY LM_STG_PROF_ITM	LM_PROFILES LM_PROF_RVAL LM_PROFILE_CAT LM_PROFILE_ITEM	Subscribes to full data publish of the PeopleSoft HCM profile items.
JPM_JP_SYNC	LM_ProfileSync		LM_PROFILES LM_PROF_RVAL LM_PROFILE_CAT LM_PROFILE_ITEM	Subscribes to updates that have been made to the PeopleSoft HCM profile items.

Message Name	***Message Subscription PeopleCode***	***Staging Table***	***Destination Record in Enterprise Learning Management***	***Explanation***
EP_COMP_RATING	LmEpCompRating		LM_LRNR_OBJV	Subscribes to PeopleSoft ePerformance competencies for which the target rating is not met or is blank. ELM adds the competencies with deficient target ratings as learning objectives for the associated learner. Competencies with blank target ratings trigger the gap analysis process. See Understanding Gap Analysis.

Outbound Learner Objective EIPs

This table lists and describes each outbound learner objective EIP:

Message Name	***Record***	***Explanation***
LM_HR_LRNR_OBJECTIVES	LM_HR_EVALS, LM_LRNR_OBJV_HR	Publishes updated competency data based on completed Enterprise Learning Management objectives. **Note:** The system publishes only improved proficiencies.
LM_LEARNER_OBJECTIVES_SYNC	LM_LRNR_OBJ_MSG	Publishes any Enterprise Learning Management objective data that has been set to met status since the last learner objective sync or full sync process. This incremental message is sent by the system only when the learner objective is met.
LM_LEARNER_OBJECTIVES_FULLSYNC	LM_LRNR_OBJ_MSG	Publishes all Enterprise Learning Management objective data that exists as of a specific date.

Understanding Gap Analysis

The system performs gap analysis to determine which objectives to assign to learners. During gap analysis the system compares the objectives that learners must know for their job roles (job code or position number) to the objectives that the learners have already completed. The difference is the learning gap. After completing gap analysis, the system assigns needed objectives to learners to fulfill the learning gaps.

The following tables lists the conditions that trigger the objective gap analysis process.

Condition that Triggers Gap Analysis	***Description***
You load competency, job role competency, person competency, and rating model data from the external human resources system to Enterprise Learning Management.	After all data loads successfully, the system compares competencies required by each job role to a learner's met objectives.
Enterprise Learning Management receives incremental sync messages from the human resources system.	Changes that you make to a learner's job or position information, person competencies, or job role competency data in the human resources system, trigger an incremental sync message (JPM_JP_SYNC) to Enterprise Learning Management with the data changes. When Enterprise Learning Management receives the messages it compares competencies required by each job role to a learner's met objectives. When a learner's job code or position number changes, the system deletes any objectives for the learner's previous job code or position number that have a status of Needed and that do not have any other association with the learner. Objectives that the learner has completed for a previous job code or position number are kept in the learner's objectives history record.
A manager completes a performance review in ePerformance with one or more target ratings that is blank.	Saving a performance document that includes competencies for which a learner has a blank target rating triggers the EP_COMP_RATING message to Enterprise Learning Management with the competencies that have a blank rating. See the product documentation for *PeopleSoft HCM: ePerformance*.
You change objectives that are mapped to a job code or position number in Enterprise Learning Management.	When you make changes on the Maintain Job Code Objectives page and Position Objectives page, the system triggers the gap analysis process when you save the page. The system compares objectives required by the job role to a learner's met objectives. See Assigning Objectives to Jobs and Position Numbers.

Condition that Triggers Gap Analysis	***Description***
You run the Process Job Role Objectives process	If you create future-dated objective assignments to job codes and position numbers, you must run the Process Job Role Objectives process to initiate gap analysis for these objective assignments. The system compares the objectives required by the job role to a learner's met objectives. See Assigning Objectives to Jobs and Position Numbers.
The system receives needed learner objectives from an external system other than human resources.	The system compares the needed learner objectives received from the external system with a learner's met Enterprise Learning Management objectives. See Importing Learner Objective Data from Non-PeopleSoft HR Systems.
A new person is added in HR.	The system compares the competencies required by the learner's job role to the learner's met objectives, taking into account any changes to objectives entered on the Maintain Job Code Objectives page or the Position Objectives page.

See Assigning Objectives to Jobs and Position Numbers.

Gap Analysis Hierarchy

When a rating model is associated with an objective, the system compares proficiency levels of objectives to determine whether a learning gap exists. To determine which proficiency is higher, the system uses numeric ratings, review points, and review ratings.

See Creating and Reviewing Rating Models.

The system uses this sequence (hierarchy) to determine which proficiency is higher:

1. Numeric ratings.

   The system compares the numeric rating of the objective with the learner's current numeric rating for that objective.

2. Review points.

   If the numeric rating for the objective or learner objective is unavailable or equals 0, the system compares review points.

3. Review ratings.

   If review points are unavailable or equal 0, the system compares review ratings. Review ratings in a human resources system are equivalent to proficiencies in Enterprise Learning Management.

Importing Objectives from PeopleSoft HCM

You can create objectives in PeopleSoft ELM by importing them from PeopleSoft HCM.

Pages Used to Import Objectives from PeopleSoft HCM

Page Name	***Definition Name***	***Usage***
Service Operations - General Page	IB_SERVICE	Confirm default and active versions for service operations.
Routings - Parameters Page	IB_ROUTINGDEFNDOC	Confirm routing configurations.
“Full Table Publish Rules Page” (Integration Interfaces)	EOIU_SOPUBFULL	Confirm that full data publish rules are active.
“Full Data Publish Page” (Integration Interfaces)	EO_FULLDATAPUB	Initiate the process that publishes HCM data to your ELM database.
Process FullSync Data Page	LM_RNCTL_FULL_LOAD	Run the Process FullSync Data (LM_LD _STGDAT) Application Engine process to validate full sync data in the staging table, load validated data into ELM, and delete data from the staging tables.
Content Type Filter Page	LM_CATSETUP_TBL	Define content type filters.
Process Learner Objectives Page	LM_EXTOBJV_RNCTRL	Convert catalog types and catalog data imported from HCM to ELM objectives.
Create Objectives-External EIP Page	LM_OBJVASSN_RNCTRL	Assign imported objectives to learners.

For more information on the Service Operations - General and Routings - Parameters pages, see the product documentation for *PeopleTools: Integration Broker*.

Prerequisites for Importing Objective Data from PeopleSoft HCM

Before importing objective data from PeopleSoft HCM, you must perform the following steps to establish your integration and import basic HCM data.

1. Use PeopleSoft Integration Broker to establish an integration between your HCM and ELM environments. For more information on setting up this integration, see Setting Up Integration Broker for HCM, and Setting Up Integration Broker for ELM.
2. In your HCM environment, use the “Full Data Publish Page” (Integration Interfaces) to run the following messages:
    - JOBCODE_FULLSYNC
    - DEPT_FULLSYNC
    - POSITION_FULLSYNC
    - POI_TYPE_TBL_FULLSYNC

- PERSON_BASIC_FULLSYNC
- PERS_POI_FULLSYNC
- WORKFORCE_FULLSYNC

3. In your ELM environment, use the Process FullSync Data Page to run the following staged data processes:
   - Organization Data
   - Person of Interest Types
   - Person Data
   - Person of Interest Data
   - Workforce Data

Rather than publishing the messages and processing the staged data in separate steps, you can use the ELM Full Sync Integration Guided Process to run the following messages and their associated staged data processes:

- JOBCODE_FULLSYNC
- DEPT_FULLSYNC/Organization Data
- POSITION_FULLSYNC
- POI_TYPE_TBL_FULLSYNC/Person of Interest Types
- PERSON_BASIC_FULLSYNC/Person Data
- WORKFORCE_FULLSYNC/Workforce Data

For more information on the guided process, see Understanding the ELM Full Sync Integration Guided Process.

Note: For the PERS_POI_FULLSYNC message and Person of Interest Data process, you will still need to use the “Full Data Publish Page” (Integration Interfaces) and Process FullSync Data Page.

Configuring FullSync Service Operations

Before publishing and processing objective data, you must configure the following service operations in both your HCM and ELM environments:

- RATING_MODEL_FULLSYNC
- JPM_CAT_FULLSYNC
- JPM_JP_QUAL_FULLSYNC
- JPM_JP_TYPE_FULLSYNC

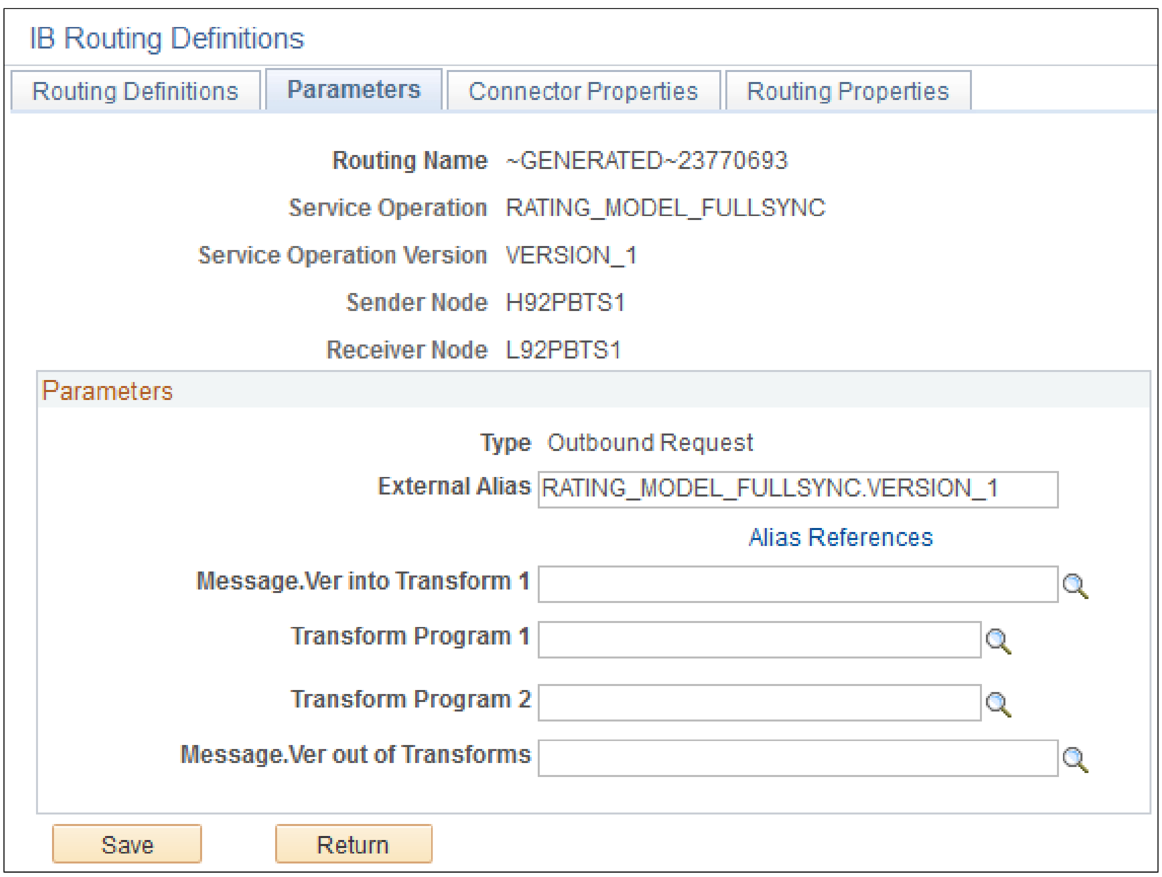
- JPM_JP_FULLSYNC

Configuring RATING_MODEL_FULLSYNC for HCM

To configure the RATING_MODEL_FULLSYNC service operation in your HCM environment:

1. Access the “Full Table Publish Rules Page” (Integration Interfaces) (**Enterprise Components** > **Integration Definitions** > **Full Data Publish Rules**) for RATING_MODEL_FULLSYNC.
2. Confirm that the **Status** is *Active*.
3. Click the Service Operation link to access the Service Operations - General page for RATING_MODEL_FULLSYNC.
4. Make sure that the default and active version is VERSION_1.
5. Access the Service Operations - Routing page.
6. Make sure that the active outbound routing is configured correctly.

   This example illustrates the correct parameters for the RATING_MODEL_FULLSYNC outbound routing.



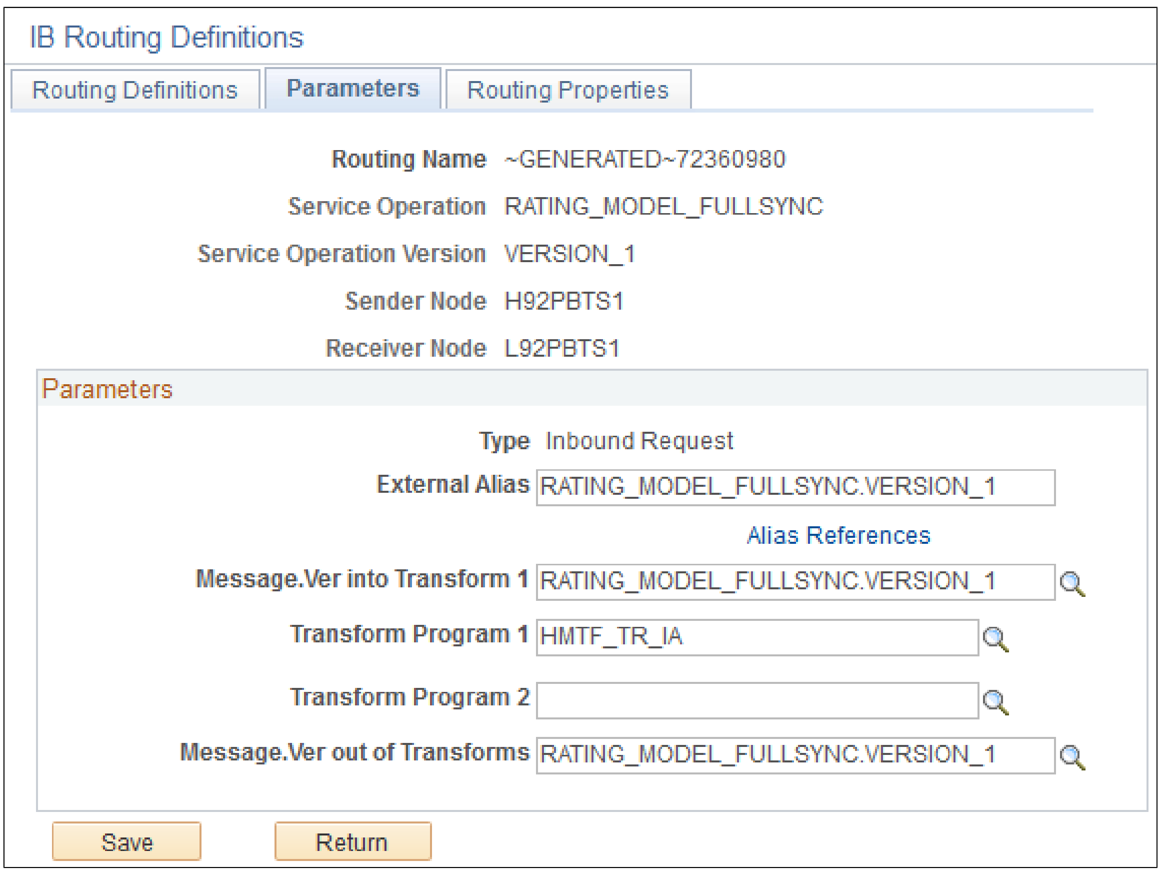
Field or Control	Description
External Alias	Enter a value of *RATING_MODEL_FULLSYNC.VERSION_1*.

Configuring RATING_MODEL_FULLSYNC for ELM

To configure the RATING_MODEL_FULLSYNC service operation in your ELM environment:

1. Access the Service Operations - General page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**) for RATING_MODEL_FULLSYNC.
2. Make sure that the default and active version is VERSION_1.
3. Access the Service Operations - Routing page.
4. Make sure that the active inbound routing is configured correctly.

   This example illustrates the correct parameters for the RATING_MODEL_FULLSYNC inbound routing.



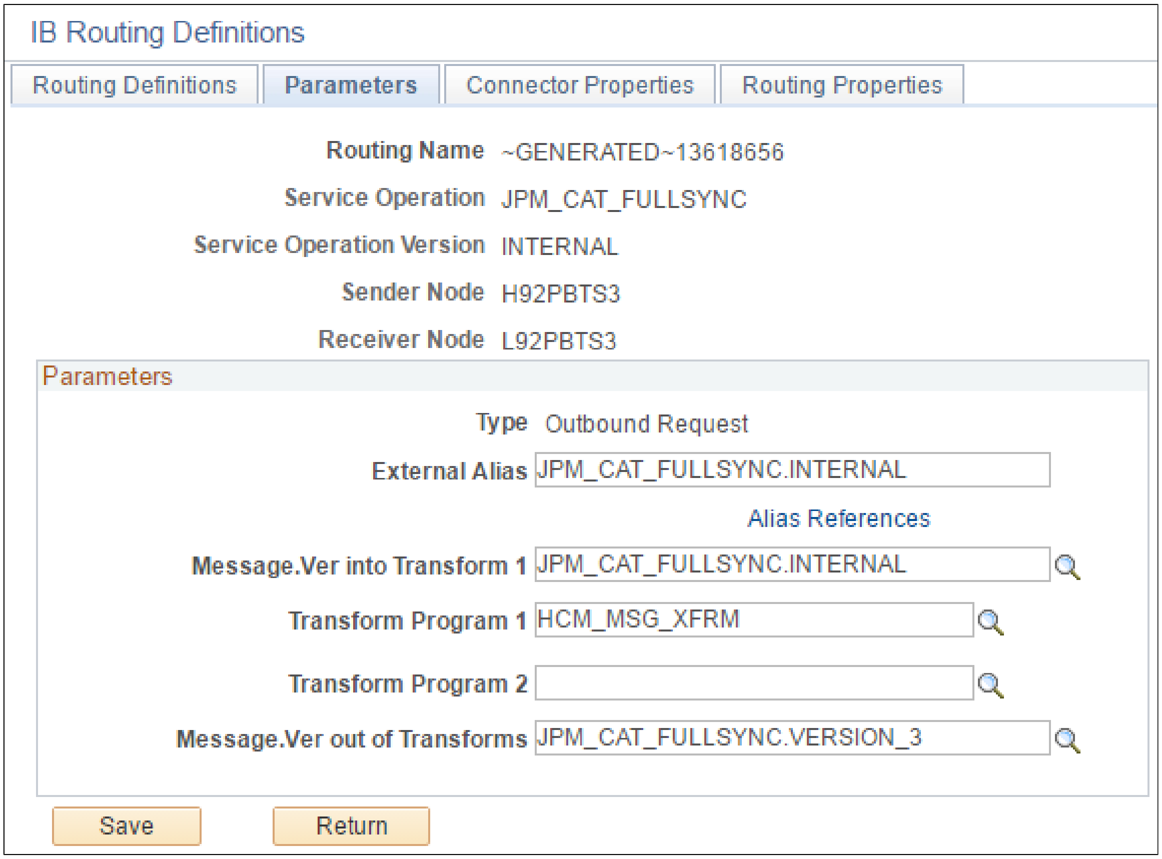
Field or Control	***Description***
External Alias	Enter a value of *RATING_MODEL_FULLSYNC.VERSION _1*.
Message.Ver into Transform 1	Enter a value of *RATING_MODEL_FULLSYNC.VERSION _1*.
Transform Program 1	Enter a value of *HMTF_TR_IA*.
Message.Ver out of Transforms	Enter a value of *RATING_MODEL_FULLSYNC.VERSION _1*.

Configuring JPM_CAT_FULLSYNC for HCM

To configure the JPM_CAT_FULLSYNC service operation in your HCM environment:

1. Access the “Full Table Publish Rules Page” (Integration Interfaces) (**Enterprise Components** > **Integration Definitions** > **Full Data Publish Rules**) for JPM_CAT_FULLSYNC.
2. Confirm that the **Status** is *Active*.
3. Click the Service Operation link to access the Service Operations - General page for JPM_CAT_FULLSYNC.
4. Make sure that the default and active version is INTERNAL.
5. Access the Service Operations - Routing page.
6. Make sure that the active outbound routing is configured correctly.

This example illustrates the correct parameters for the JPM_CAT_FULLSYNC outbound routing.



Field or Control	***Description***
External Alias	Enter a value of *JPM_CAT_FULLSYNC.INTERNAL*.
Message.Ver into Transform 1	Enter a value of *JPM_CAT_FULLSYNC.INTERNAL*.
Transform Program 1	Enter a value of *HCM_MSG_XFRM*.
Message.Ver out of Transforms	Enter a value of *JPM_CAT_FULLSYNC.VERSION_3*

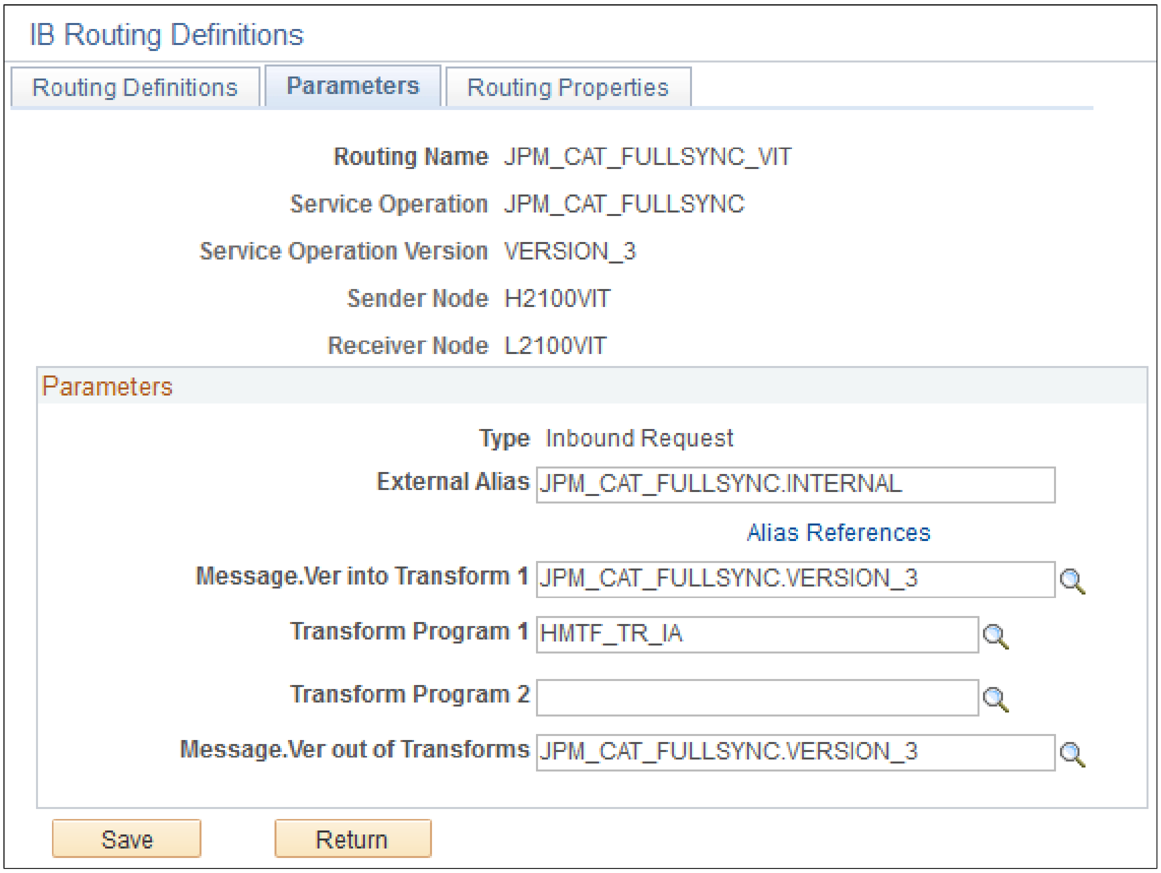
Configuring JPM_CAT_FULLSYNC for ELM

To configure the JPM_CAT_FULLSYNC service operation in your ELM environment:

1. Access the Service Operations - General page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**) for JPM_CAT_FULLSYNC.
2. Make sure that the default and active version is VERSION_3.
3. Access the Service Operations - Routing page.

4. Make sure that the active inbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_CAT_FULLSYNC inbound routing.



Field or Control	***Description***
External Alias	Enter a value of *JPM_CAT_FULLSYNC.INTERNAL*.
Message.Ver into Transform 1	Enter a value of *JPM_CAT_FULLSYNC.VERSION_3*.
Transform Program 1	Enter a value of *HMTF_TR_IA*.
Message.Ver out of Transforms	Enter a value of *JPM_CAT_FULLSYNC.VERSION_3*.

Configuring JPM_JP_QUAL_FULLSYNC for HCM

To configure the JPM_JP_QUAL_FULLSYNC service operation in your HCM environment:

1. Access the “Full Table Publish Rules Page” (Integration Interfaces) (**Enterprise Components** > **Integration Definitions** > **Full Data Publish Rules**) for JPM_JP_QUAL_FULLSYNC.

2. Confirm that the **Status** is *Active*.

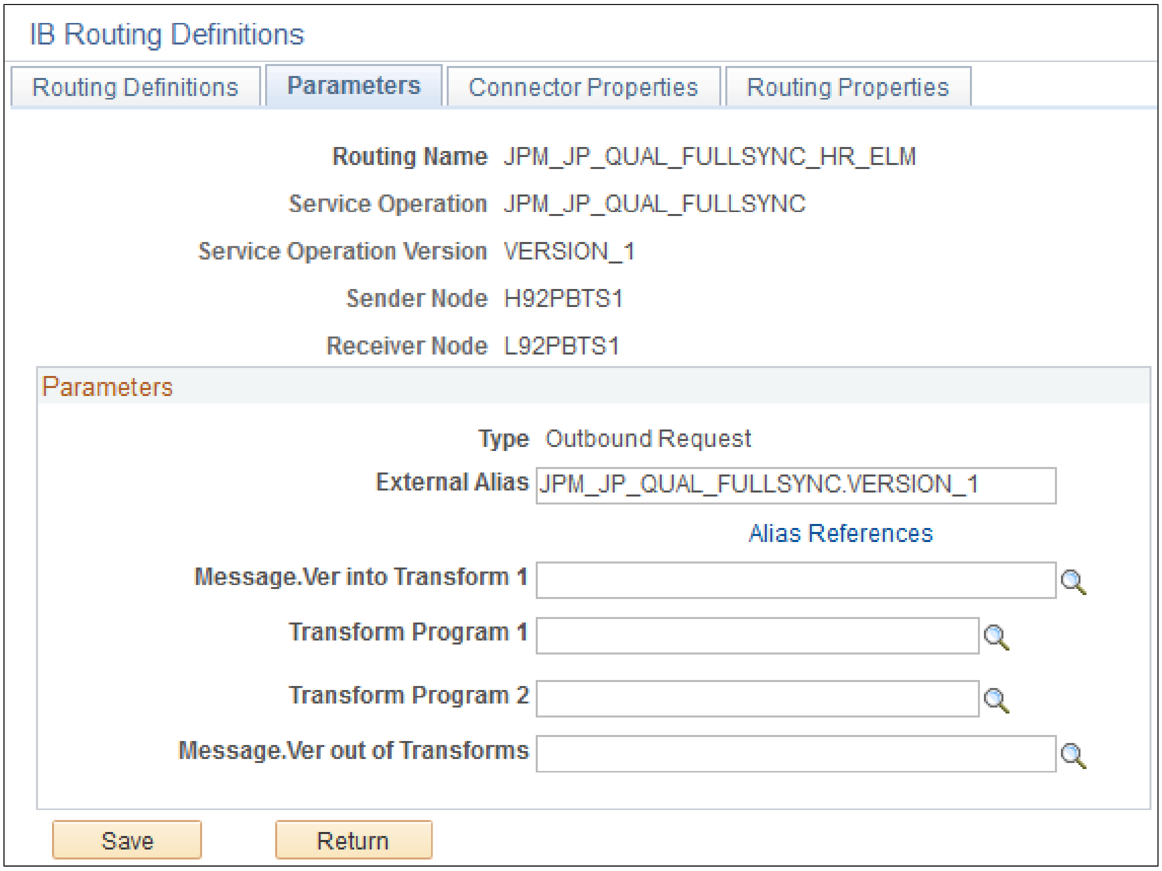
3. Click the Service Operation link to access the Service Operations - General page for JPM_JP_QUAL_FULLSYNC.

4. Make sure that the default and active version is VERSION_1.

5. Access the Service Operations - Routing page.

6. Make sure that the active outbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_QUAL_FULLSYNC outbound routing.



Field or Control	***Description***
External Alias	Enter a value of *JPM_JP_QUAL_FULLSYNC.VERSION_1*.

Configuring JPM_JP_QUAL_FULLSYNC for ELM

To configure the JPM_JP_QUAL_FULLSYNC service operation in your ELM environment:

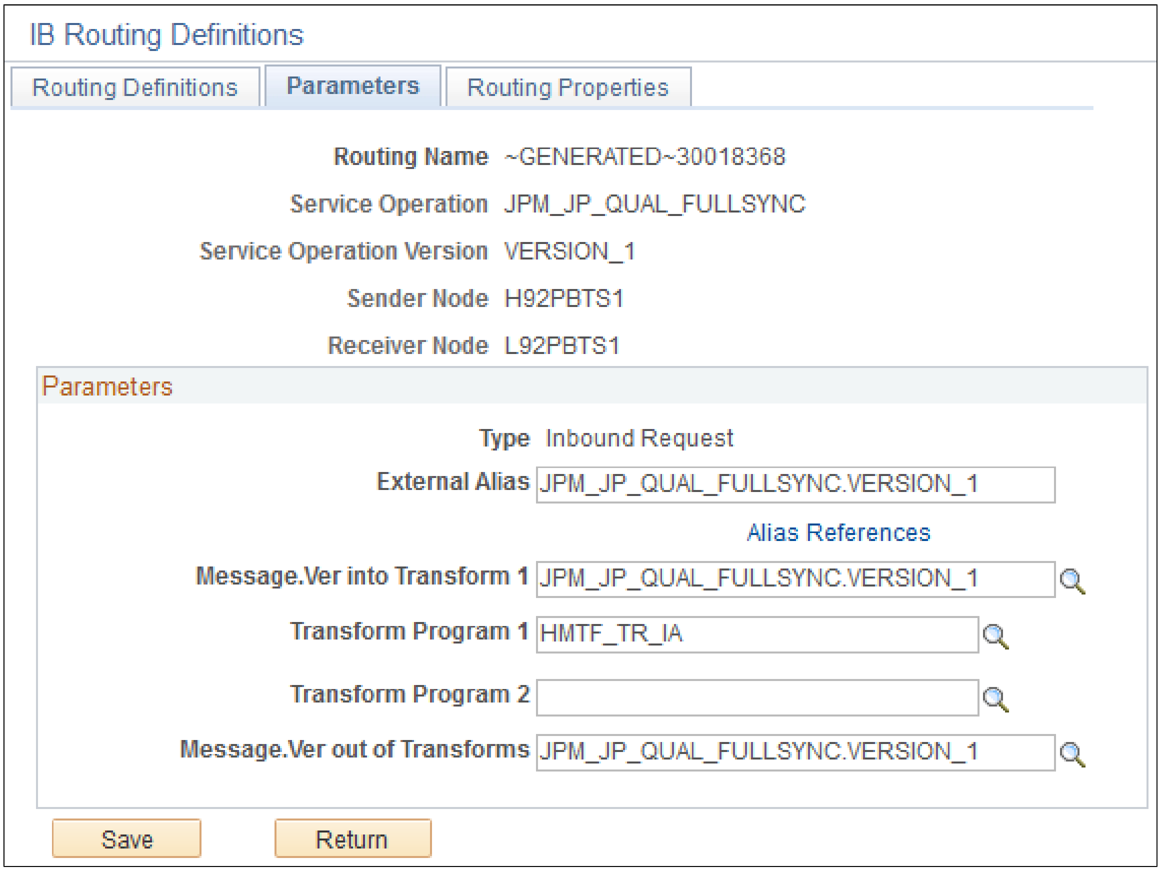
1. Access the Service Operations - General page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**) for JPM_JP_QUAL_FULLSYNC.

2. Make sure that the default and active version is VERSION_1.

3. Access the Service Operations - Routing page.

4. Make sure that the active inbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_QUAL_FULLSYNC inbound routing.



Field or Control	***Description***
External Alias	Enter a value of *JPM_JP_QUAL_FULLSYNC.VERSION_1*.
Message.Ver into Transform 1	Enter a value of *JPM_JP_QUAL_FULLSYNC.VERSION_1*.
Transform Program 1	Enter a value of *HMTF_TR_IA*.
Message.Ver out of Transforms	Enter a value of *JPM_JP_QUAL_FULLSYNC.VERSION_1*.

JPM_JP_TYPE_FULLSYNC for HCM

To configure the JPM_JP_TYPE_FULLSYNC service operation in your HCM environment:

1. Access the “Full Table Publish Rules Page” (Integration Interfaces) (**Enterprise Components** > **Integration Definitions** > **Full Data Publish Rules**) for JPM_JP_TYPE_FULLSYNC.

2. Confirm that the **Status** is *Active*.

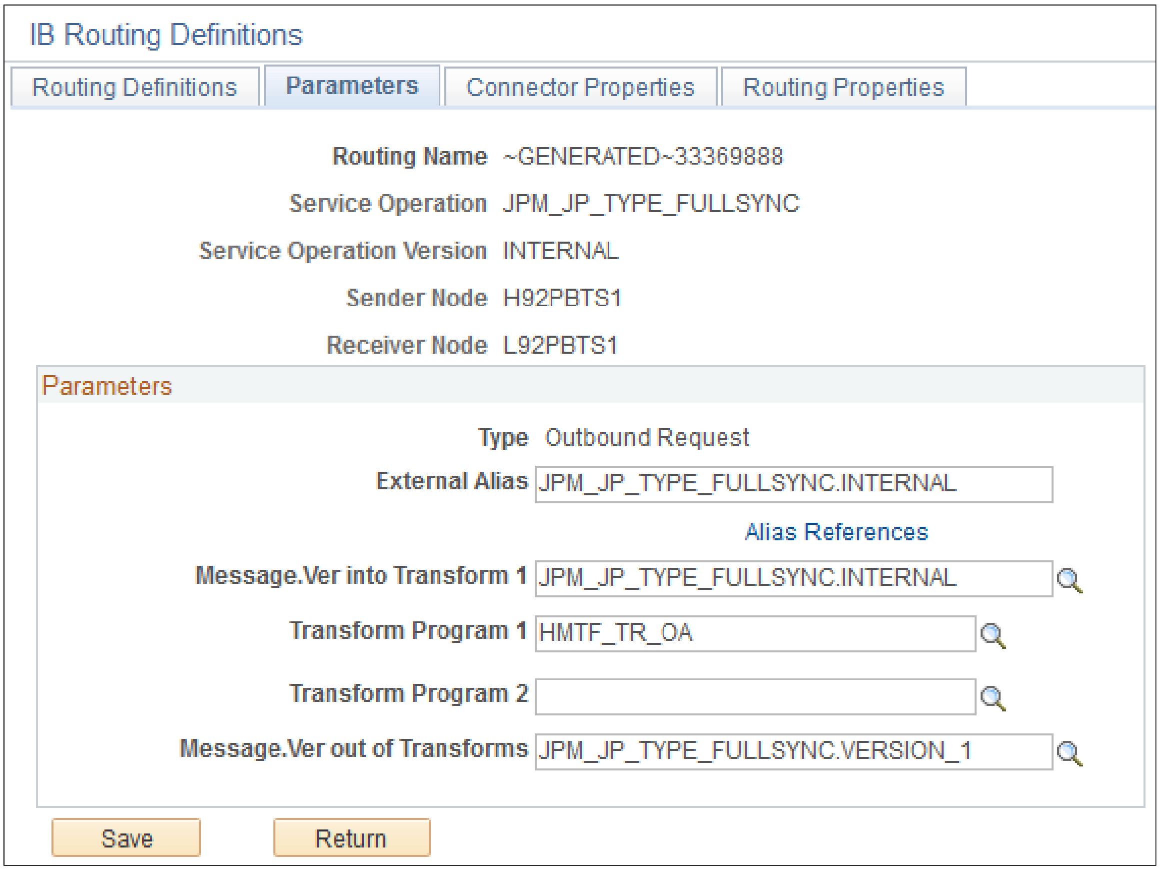
3. Click the Service Operation link to access the Service Operations - General page for JPM_JP_TYPE_FULLSYNC.

4. Make sure that the default and active version is INTERNAL.

5. Access the Service Operations - Routing page.

6. Make sure that the active outbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_TYPE_FULLSYNC outbound routing.



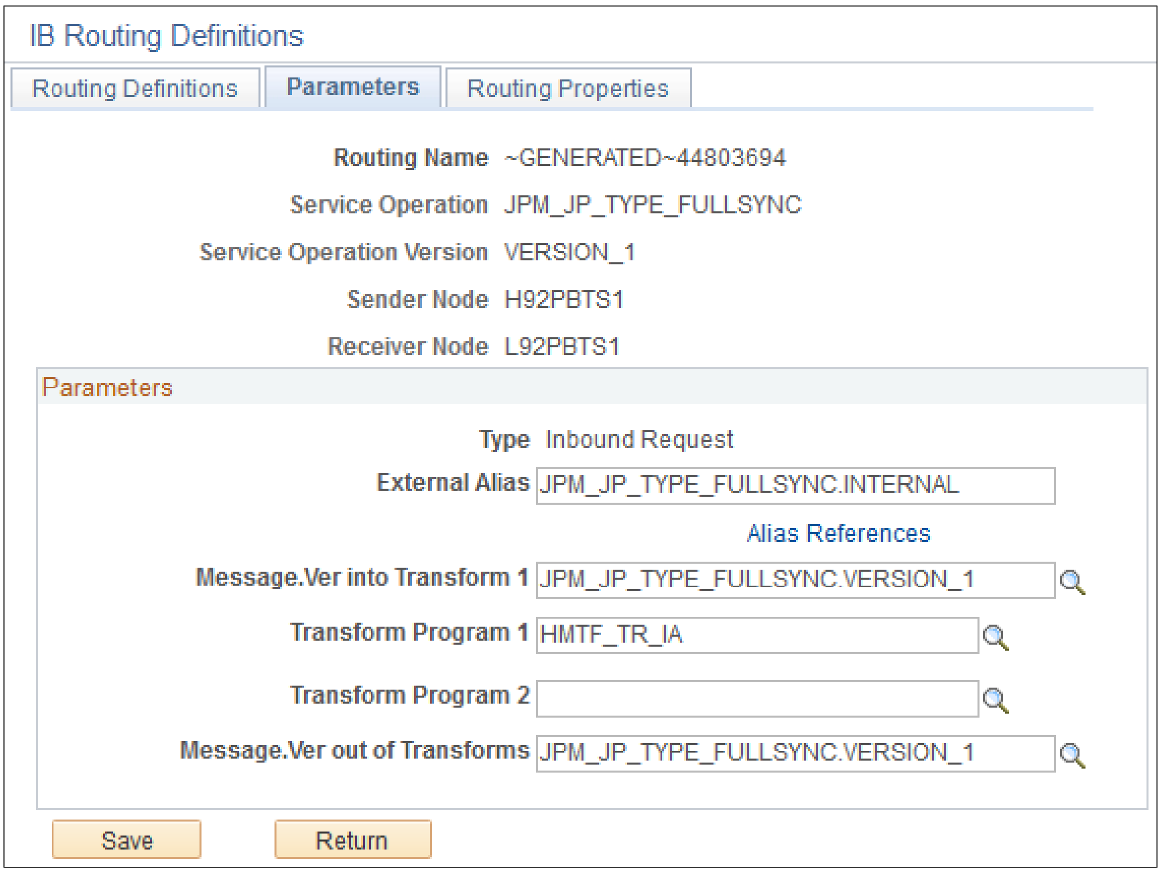
Field or Control	***Description***
External Alias	Enter a value of *JPM_JP_TYPE_FULLSYNC.INTERNAL*.
Message.Ver into Transform 1	Enter a value of *JPM_JP_TYPE_FULLSYNC.INTERNAL*.
Transform Program 1	Enter a value of *HMTF_TR_OA*.
Message.Ver out of Transforms	Enter a value of *JPM_JP_TYPE_FULLSYNC.VERSION_1*.

JPM_JP_TYPE_FULLSYNC for ELM

To configure the JPM_JP_TYPE_FULLSYNC service operation in your ELM environment:

1. Access the Service Operations - General page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**) for JPM_JP_TYPE_FULLSYNC.
2. Make sure that the default and active version is VERSION_1.
3. Access the Service Operations - Routing page.
4. Make sure that the active inbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_TYPE_FULLSYNC inbound routing.



Field or Control	***Description***
External Alias	Enter a value of *JPM_JP_TYPE_FULLSYNC.INTERNAL*.
Message.Ver into Transform 1	Enter a value of *JPM_JP_TYPE_FULLSYNC.VERSION_1*.
Transform Program 1	Enter a value of *HMTF_TR_IA*.
Message.Ver out of Transforms	Enter a value of *JPM_JP_TYPE_FULLSYNC.VERSION_1*.

JPM_JP_FULLSYNC for HCM

To configure the JPM_JP_FULLSYNC service operation in your HCM environment:

1. Access the "Full Table Publish Rules Page" (Integration Interfaces) (**Enterprise Components** > **Integration Definitions** > **Full Data Publish Rules**) for JPM_JP_FULLSYNC.

2. Confirm that the **Status** is *Active*.

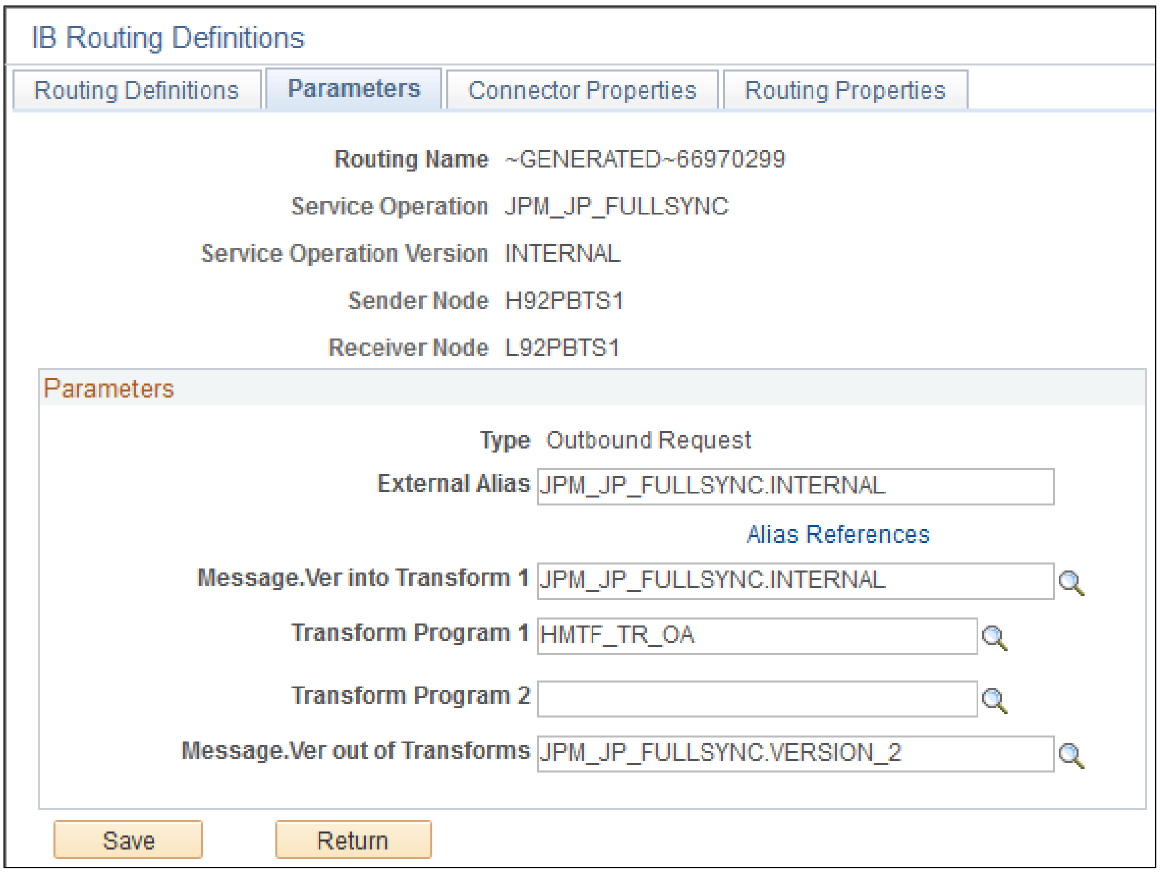
3. Click the Service Operation link to access the Service Operations - General page for JPM_JP_FULLSYNC.

4. Make sure that the default and active version is INTERNAL.

5. Access the Service Operations - Routing page.

6. Make sure that the active outbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_FULLSYNC outbound routing.



Field or Control	***Description***
External Alias	Enter a value of *JPM_JP_FULLSYNC.INTERNAL*.
Message.Ver into Transform 1	Enter a value of *JPM_JP_FULLSYNC.INTERNAL*.

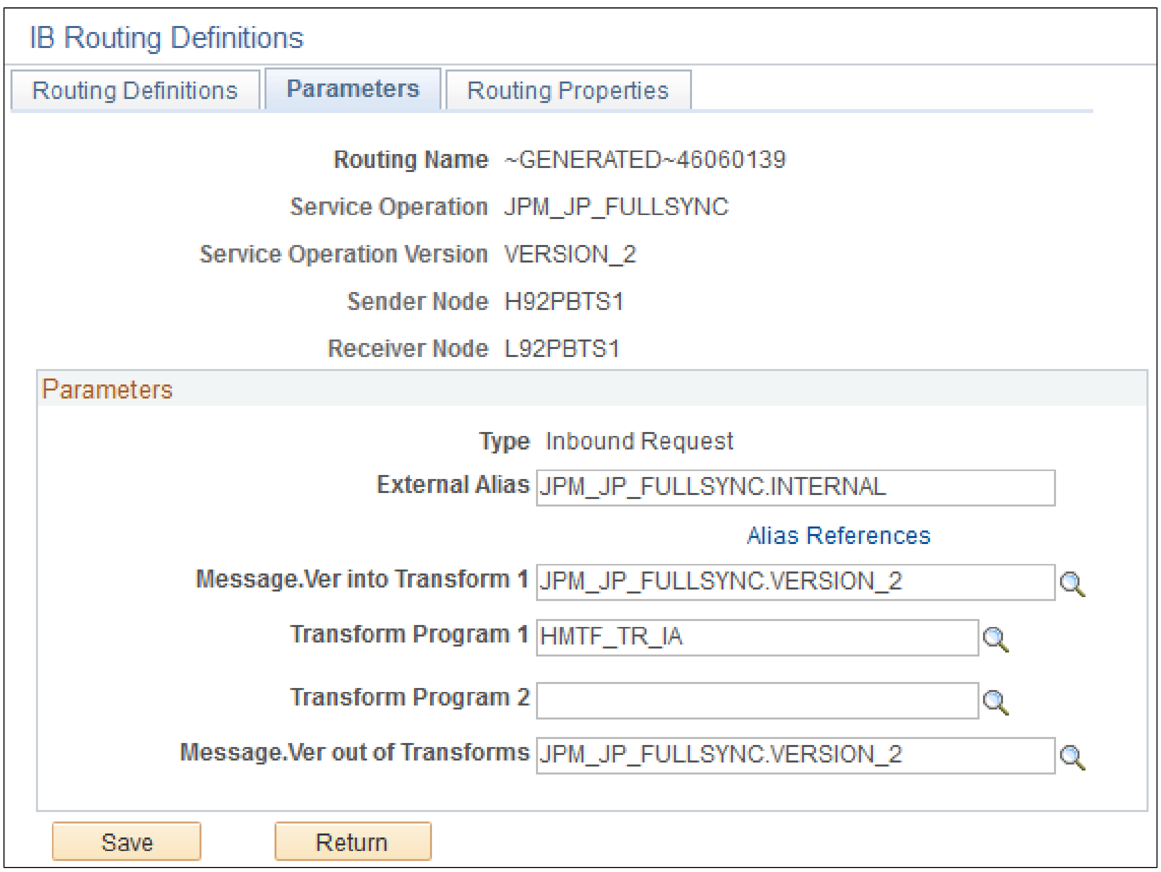
Field or Control	***Description***
Transform Program 1	Enter a value of *HMTF_TR_OA*.
Message.Ver out of Transforms	Enter a value of *JPM_JP_FULLSYNC.VERSION_2*.

JPM_JP_FULLSYNC for ELM

To configure the JPM_JP_FULLSYNC service operation in your ELM environment:

1. Access the Service Operations - General page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**) for JPM_JP_FULLSYNC.
2. Make sure that the default and active version is VERSION_2.
3. Access the Service Operations - Routing page.
4. Make sure that the active inbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_FULLSYNC inbound routing.



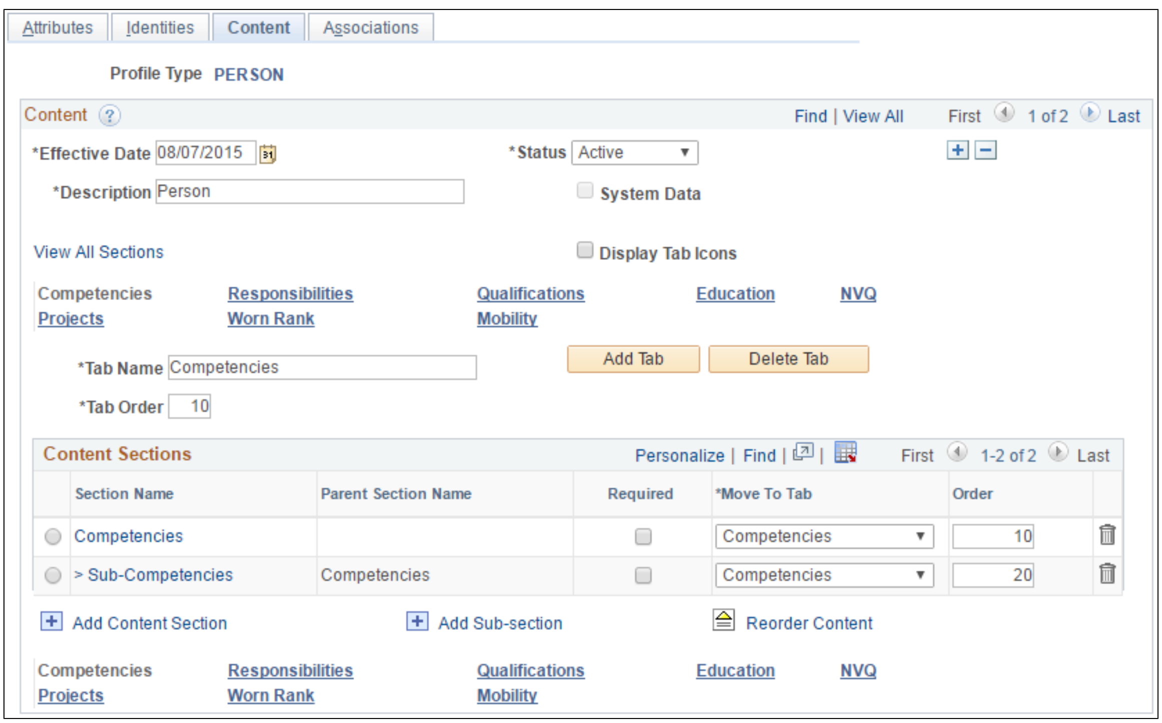
Field or Control	Description
External Alias	Enter a value of *JPM_JP_FULLSYNC.INTERNAL*.
Message.Ver into Transform 1	Enter a value of *JPM_JP_FULLSYNC.VERSION_2*.
Transform Program 1	Enter a value of *HMTF_TR_IA*.
Message.Ver out of Transforms	Enter a value of *JPM_JP_FULLSYNC.VERSION_2*.

Importing and Processing Objective Data

To import and process objective data from HCM:

1. In your HCM environment use the “Full Data Publish Page” (Integration Interfaces) to run the RATING_MODEL_FULLSYNC message.
2. In your HCM environment, use the Profile Types - Content page to ensure that the PERSON profile type includes the Sub-Competencies sub-section.

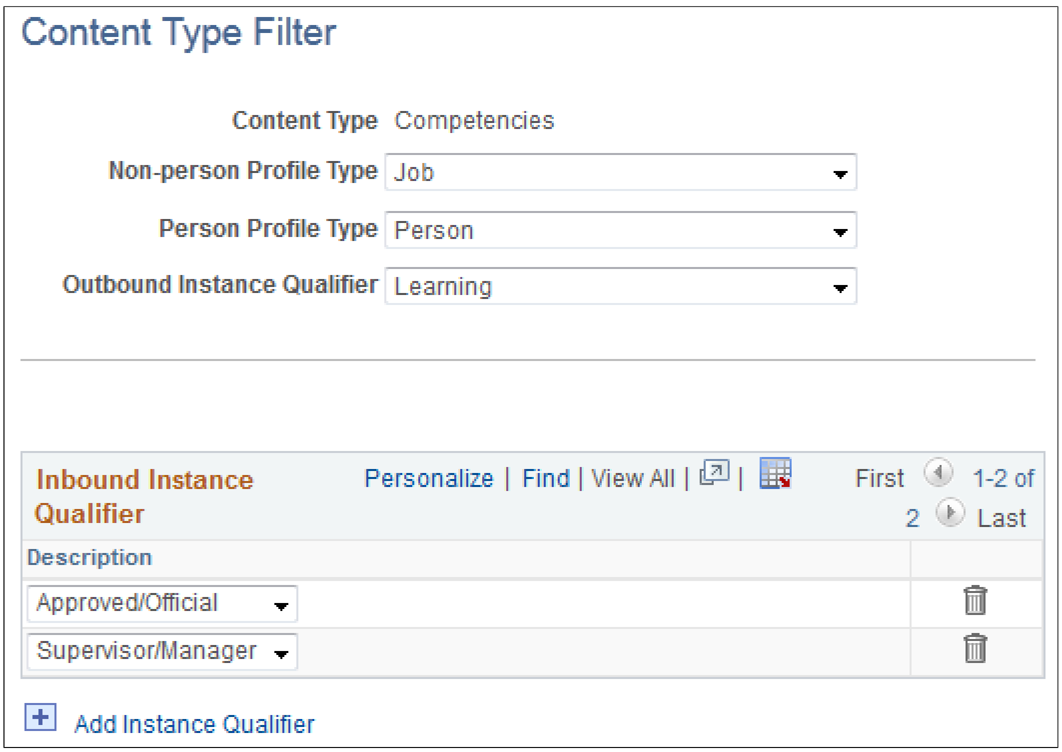
   This example illustrates how to configure the PERSON profile type.



   Ensure that the Content Sections grid includes the Sub-Competencies sub-section. If it doesn’t, you won’t be able to set up the Sub-Competencies content type filter correctly in your ELM environment.
3. In your HCM environment use the “Full Data Publish Page” (Integration Interfaces) to run the JPM_CAT_FULLSYNC message.

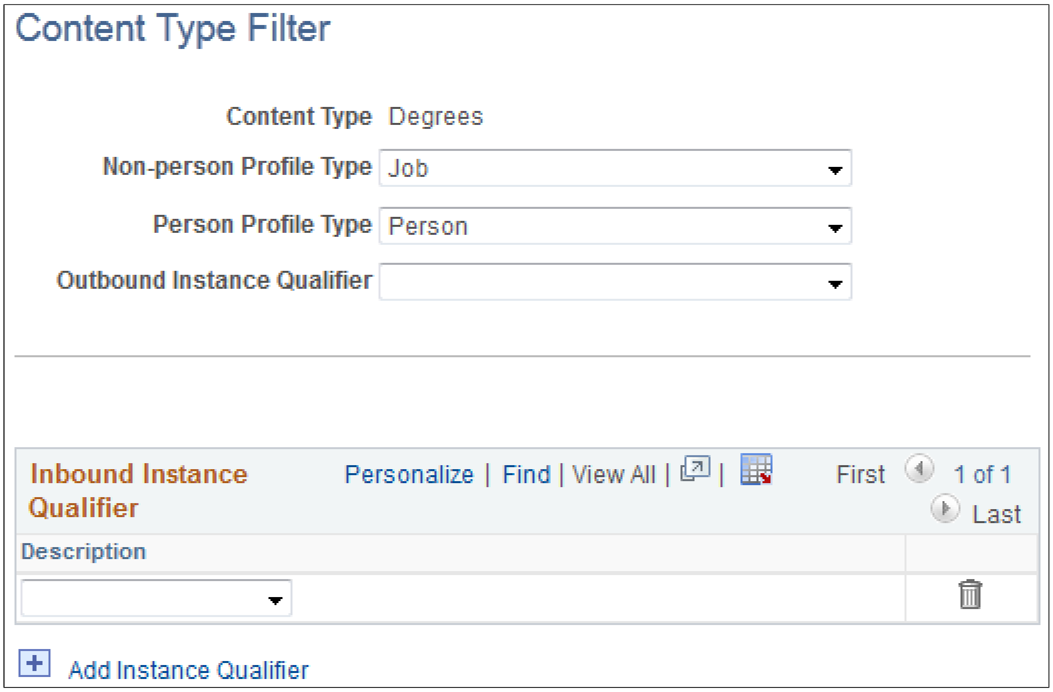
4. In your ELM environment, use the Process FullSync Data Page, to run the Catalog Data process.
5. In your HCM environment use the “Full Data Publish Page” (Integration Interfaces) to run the JPM_JP_QUAL_FULLSYNC message.
6. In your ELM environment, use the Process FullSync Data Page, to run the Instance Qualifier Data process.
7. In your HCM environment use the “Full Data Publish Page” (Integration Interfaces) to run the JPM_JP_TYPE_FULLSYNC message.
8. In your ELM environment, use the Process FullSync Data Page, to run the Profile Type process.
9. Use the Content Type Filter page (**Set Up ELM** > **Objectives** > **Content Type Filters**) to create filters for the Competencies, Degrees, and Sub-Competencies content types.

   This example illustrates how to configure the Competencies content type filter.



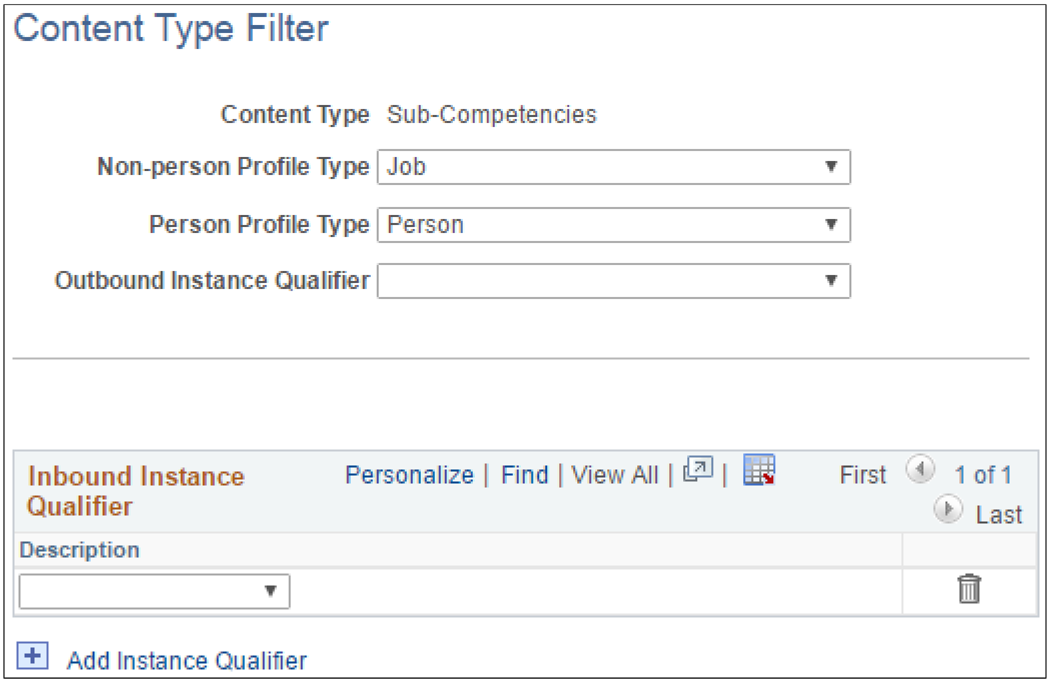
Field or Control	*Description*
Non-person Profile Type	Enter a value of *Job.*
Person Profile Type	Enter a value of *Person.*
Outbound Instance Qualifier	Enter a value of *Learning.*
Inbound Instance Qualifier	Add the *Approved/Official* and *Supervisor/Manager* instance qualifiers.

This example illustrates how to configure the Degrees content type filter.



Field or Control	*Description*
Non-person Profile Type	Enter a value of *Job.*
Person Profile Type	Enter a value of *Person.*

This example illustrates how to configure the Sub-Competencies content type filter.



Field or Control	***Description***
Non-person Profile Type	Enter a value of *Job.*
Person Profile Type	Enter a value of *Integration from ePerformance.*

10. Run the Process Learner Objectives (LM_OBJV_LOAD) process (**Enterprise Learning** > **Learning Objectives** > **Process Learner Objectives**).
11. In your HCM environment use the “Full Data Publish Page” (Integration Interfaces) to run the JPM_JP_FULLSYNC message.
12. In your ELM environment, use the Process FullSync Data Page, to run the Profile Data process.
13. Run the Create Objectives-External EIP (LM_OBJV_ASSN) process (**Enterprise Learning** > **Learning Objectives** > **Create Objectives-External EIP**).

Configuring Sync Service Operations

To keep profile data and profile types in sync between your HCM and ELM environments you must activate and configure the following service operations:

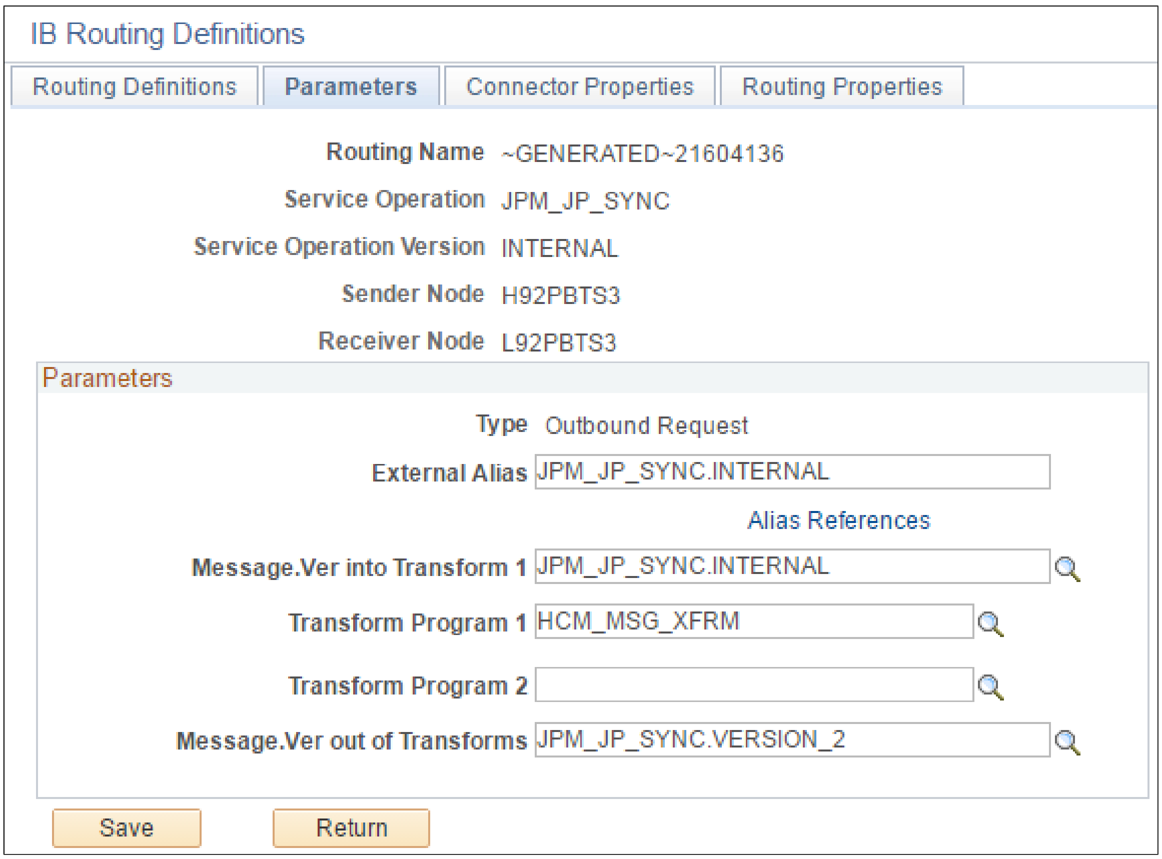
- JPM_JP_SYNC
- JPM_JP_TYPE_SYNC

Configuring JPM_JP_SYNC for HCM

To configure the JPM_JP_SYNC service operation in your HCM environment:

1. Access the Service Operations - General page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**) for JPM_JP_SYNC.
2. Make sure that the default and active version is INTERNAL.
3. Access the Service Operations - Routing page.
4. Make sure that the active outbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_SYNC outbound routing.



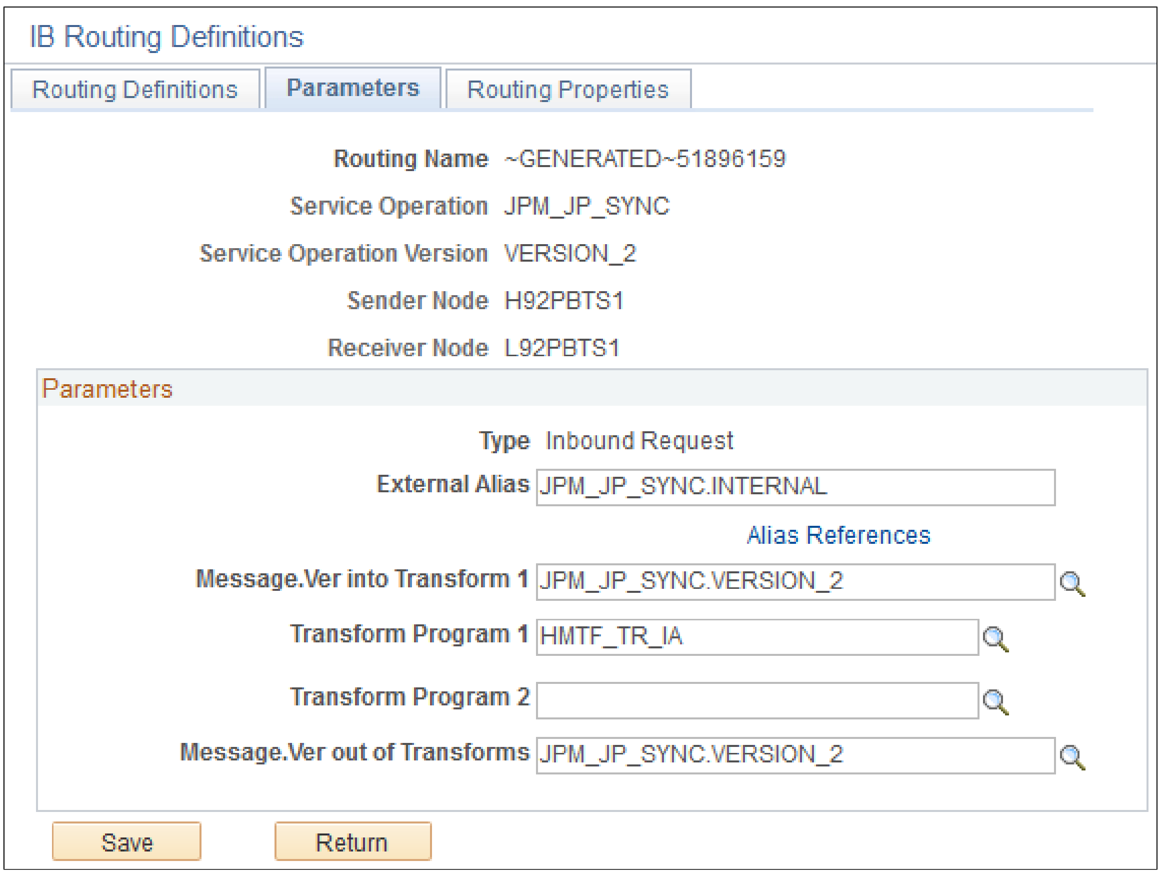
Field or Control	***Description***
External Alias	Enter a value of *JPM_JP_SYNC.INTERNAL*.
Message.Ver into Transform 1	Enter a value of *JPM_JP_SYNC.INTERNAL*.
Transform Program 1	Enter a value of *HMTF_TR_OA*.
Message.Ver out of Transforms	Enter a value of *JPM_JP_SYNC.VERSION_2*.

Configuring JPM_JP_SYNC for ELM

To configure the JPM_JP_SYNC service operation in your ELM environment:

1. Access the Service Operations - General page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**) for JPM_JP_SYNC.
2. Make sure that the default and active version is VERSION_2.
3. Access the Service Operations - Routing page.
4. Make sure that the active inbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_SYNC inbound routing.



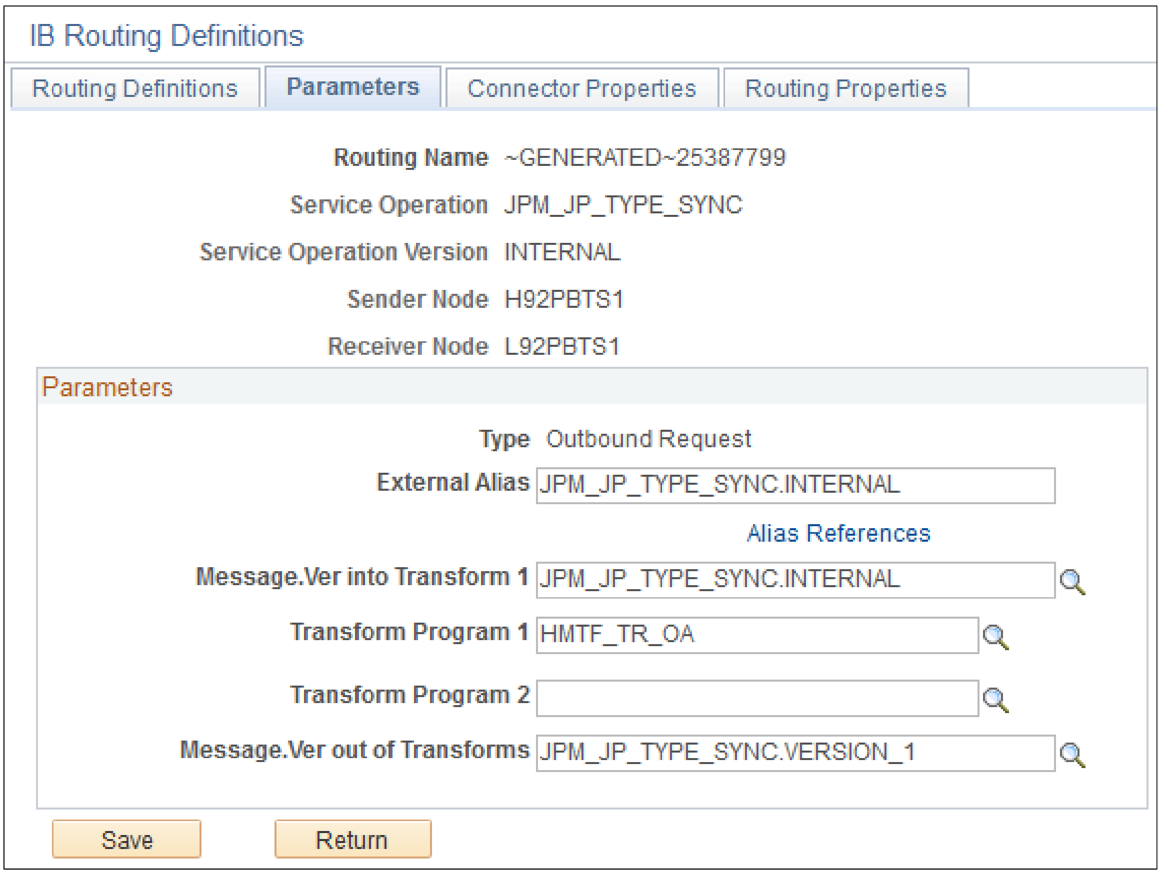
Field or Control	***Description***
External Alias	Enter a value of *JPM_JP_SYNC.INTERNAL.*
Message.Ver into Transform 1	Enter a value of *JPM_JP_SYNC.VERSION_2*.
Transform Program 1	Enter a value of *HMTF_TR_IA*.
Message.Ver out of Transforms	Enter a value of *JPM_JP_SYNC.VERSION_2*.

Configuring JPM_JP_TYPE_SYNC for HCM

To configure the JPM_JP_TYPE_SYNC service operation in your HCM environment:

1. Access the Service Operations - General page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**) for JPM_JP_TYPE_SYNC.
2. Make sure that the default and active version is INTERNAL.
3. Access the Service Operations - Routing page.
4. Make sure that the active outbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_TYPE_SYNC outbound routing.



Field or Control	***Description***
External Alias	Enter a value of *JPM_JP_TYPE_SYNC.INTERNAL*.
Message.Ver into Transform 1	Enter a value of *JPM_JP_TYPE_SYNC.INTERNAL*.
Transform Program 1	Enter a value of *HMTF_TR_OA*.

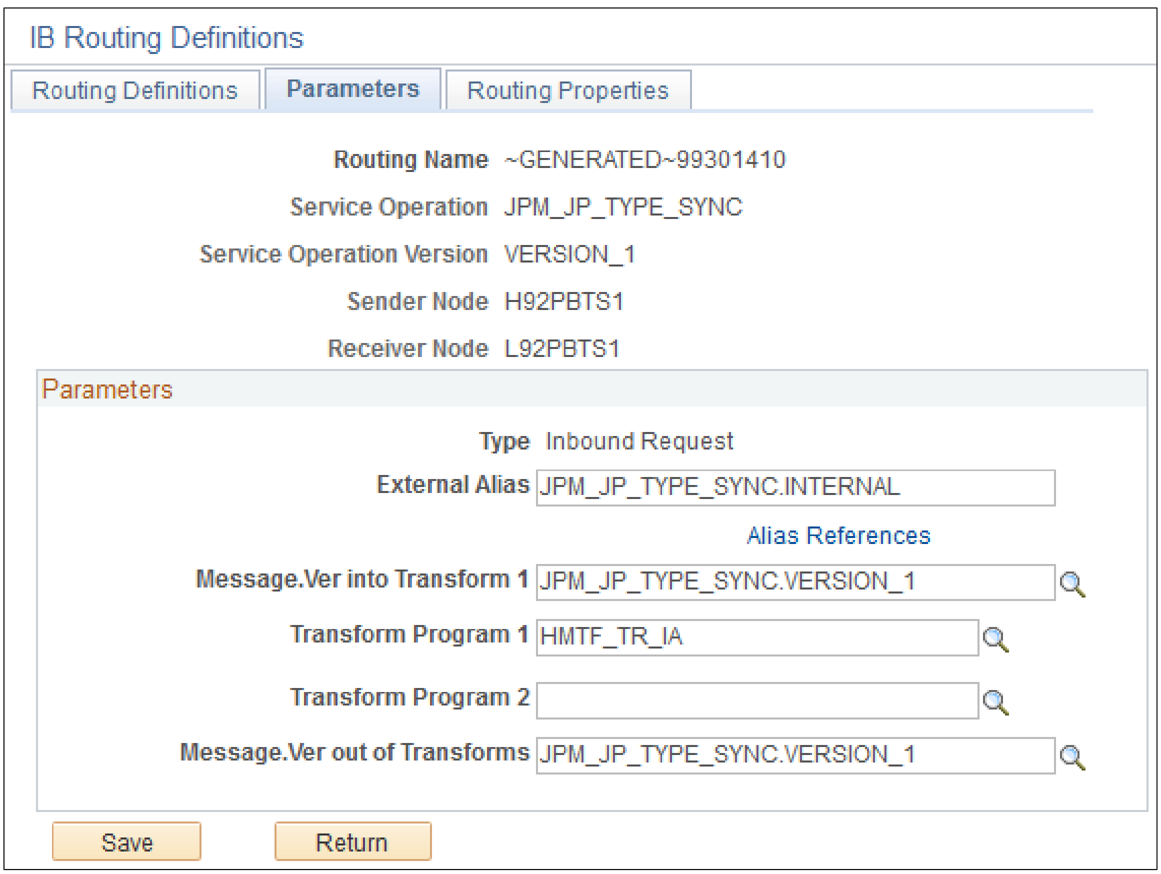
Field or Control	*Description*
Message.Ver out of Transforms	Enter a value of *JPM_JP_TYPE_SYNC.VERSION_1*.

Configuring JPM_JP_TYPE_SYNC for ELM

To configure the JPM_JP_TYPE_SYNC service operation in your ELM environment:

1. Access the Service Operations - General page (**PeopleTools** > **Integration Broker** > **Integration Setup** > **Service Operations**) for JPM_JP_TYPE_SYNC.
2. Make sure that the default and active version is VERSION_1.
3. Access the Service Operations - Routing page.
4. Make sure that the active inbound routing is configured correctly.

   This example illustrates the correct parameters for the JPM_JP_TYPE_SYNC inbound routing.



Field or Control	*Description*
External Alias	Enter a value of *JPM_JP_TYPE_SYNC.INTERNAL*.

Field or Control	*Description*
Message.Ver into Transform 1	Enter a value of *JPM_JP_TYPE_SYNC.VERSION_1*.
Transform Program 1	Enter a value of *HMTF_TR_IA*.
Message.Ver out of Transforms	Enter a value of *JPM_JP_TYPE_SYNC.VERSION_1*.

Importing Learner Objective Data from Non-PeopleSoft HR Systems

To load learner objective data from an application other than PeopleSoft HR, use the Assign Objectives - External EIP (LM_RUNCTL_EIP) component.

Pages Used to Load Learner Objective Data

Page Name	*Definition Name*	*Usage*
Assign Objectives-External EIP Page	LM_RUNCTL_EIP	Run the LM_EIP_OBJV process to perform data validation against staged learner objective data, and move the data from the staging table to an application table.
Verify Objectives Page	LM_EXTEIP_STG	Review information in the LM_STG_PERS_OBJ staging table.

Related Links

Processing Staged Data

Understanding Learner Objective Data Import

Enterprise Learning Management enables you to import needed learner objectives and proficiencies from an external system other than PeopleSoft HR through the PERSON_OBJECTIVES_SYNC EIP. The learner objectives that the external system sends must be valid Enterprise Learning Management objectives and proficiencies.

To import learner objective data from a third-party application:

1. Run the PERSON_OBJECTIVES_SYNC EIP.

   The system loads external learner objective data into the LM_STG_PERS_OBJ staging table and deletes all current rows.

2. Access the Verify Objectives page to review data in the LM_STG_PERS_OBJ staging table and ensure that the message has completed processing.

   If there are errors, correct the errors in the external system and run the PERSON_OBJECTIVES_SYNC EIP again.

3. Run the LM_EIP_OBJV Application Engine process.

   The LM_EIP_OBJV process validates the data in the LM_STG_PERS_OBJ staging table and moves the data into the Learner Objectives table (LM_LRNR_OBJV).

   Running the LM_EIP_OBJV process triggers the gap analysis process.

   See Understanding Gap Analysis.

Use the LM_LEARNER_OBJECTIVES_SYNC message to publish objective information back to the external system when the objective is met. You can also use the LM_LEARNER_OBJECTIVES_FULLSYNC message to initially publish all data to the external source if needed.

This table lists and describes the inbound external learner objective EIP:

Message Name	***Message Subscription PeopleCode***	***Record***	***Explanation***
PERSON_OBJECTIVES_ SYNC	External_PersonObjectives	LM_STG_PERS_OBJ	Loads all needed learner objectives and proficiencies into the LM_STG_PERS_ OBJ staging table. **Note:** After you run the PERSON_OBJECTIVES_ SYNC EIP, you must access the Assign Objectives - External EIP component and run the necessary process to fully validate and load the data into the application table.

Prerequisites

Before you can import learner objective data from an external application, you must:

1. Define an external source code for the external system.

2. Create rating models.

3. Define learning objectives.

Related Links

Defining and Reviewing External Source Codes

Creating and Reviewing Rating Models

Defining and Reviewing Objectives

Assign Objectives-External EIP Page

Use the Assign Objectives-External EIP page (LM_RUNCTL_EIP) to run the LM_EIP_OBJV process to perform data validation against staged learner objective data, and move the data from the staging table to an application table.

Navigation:

Enterprise Learning > **Learning Objectives** > **Assign Objectives-External EIP** > **Assign Objectives-External EIP**

Click **Run** to run this request. Process Scheduler runs the LM_EIP_OBJV process at user-defined intervals.

See the product documentation for *PeopleTools: Process Scheduler*.

Setting Up Objectives Manually

To define objectives when you do not integrate with an external human resources system:

1. (Optional) Import job codes and position numbers.

   This step is necessary if you want to map objectives to job codes and position numbers.

2. Create rating models. See Creating and Reviewing Rating Models.
3. Define objectives. See Defining and Reviewing Objectives.
4. Build a search index for objectives. See Building and Updating the Search Index for Objectives.
5. (Optional) Assign objectives to job codes and position numbers. See Assigning Objectives to Jobs and Position Numbers.
6. Assign objectives to courses and programs. See Assigning Objectives to Courses and Programs.

Defining and Reviewing External Source Codes

To define and review external source codes, use the External Sources (LM_OBJV_EXT_STP) component.

Page Used to Define External Source Codes

Page Name	***Definition Name***	***Usage***
External Source Setup Page	LM_OBJV_EXT_STP	Define external source codes, descriptions, and mapping preferences for your external messages.

Understanding External Source Codes

External source codes represent external systems from which you import values for learning objectives. Each external system must have a unique external source code.

PeopleSoft delivers the external source code, PM, for PeopleSoft HCM Profile Management. You do not need to set up this value. When you import competencies from PeopleSoft HCM, Enterprise Learning Management automatically maps the imported competencies to Enterprise Learning Management objectives, creating an objective code for each imported competency code.

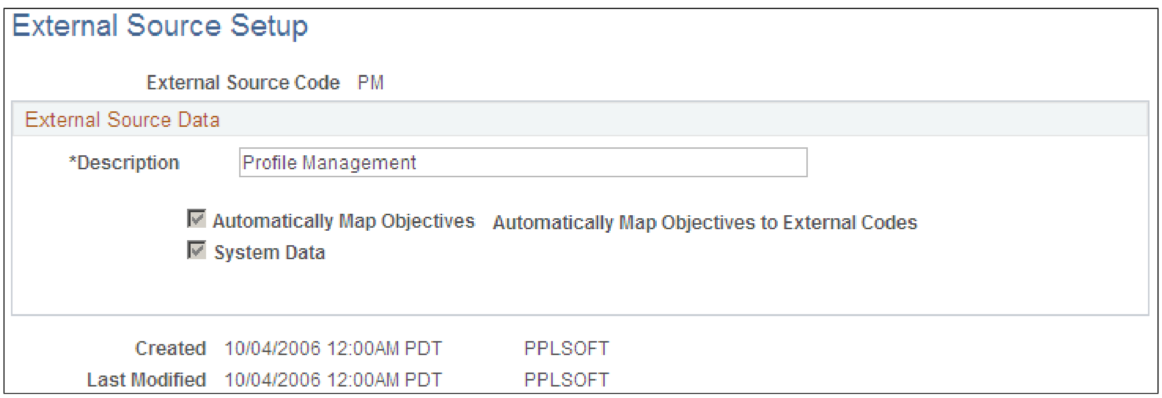
External Source Setup Page

Use the External Source Setup page (LM_OBJV_EXT_STP) to define external source codes, descriptions, and mapping preferences for your external messages.

Navigation:

Set Up ELM > Objectives > External Sources > External Source Setup

This example illustrates the fields and controls on the External Source Setup page.



Field or Control	***Description***
External Source Code	Enter an external source code, 1–10 alphanumeric characters in length. This code represents the external source from which you import external competencies and objectives. PeopleSoft delivers two external source codes: • *HRCOMP:* This code represents human resources competencies. • *ELM:* This code is automatically associated with any objectives that you manually add to Enterprise Learning Management. • *PM:* This code represents PeopleSoft Human Resources Profile Management.

Field or Control	*Description*
Description	Enter a description for the external source. When an objective from this source is assigned to a learner through the gap analysis process, the description is displayed in the Assigned By column of the self-service objectives pages. See Maintaining Learning Records and Objectives Using Employee Self Service.
Automatically Map Objectives to External Codes	This check box cannot be updated. When selected, it indicates that the system will automatically map incoming competency codes to objective codes, creating one objective code for each competency code. The automatic mapping feature is available only when importing from human resources.
System Data	This check box cannot be updated. It is selected for delivered system data. Do not edit or delete the system data.

Creating and Reviewing Rating Models

To create and review rating models, use the Rating Model (LM_RATINGMDL) component.

Page Used to Create and Review Rating Models

Page Name	*Definition Name*	*Usage*
Rating Model Page	LM_RTNG_MDL_TBL	Create rating models and review and edit imported rating models.

See the product documentation for *PeopleSoft HCM: Human Resources Manage Profiles*.

Understanding Rating Models

When a rating model is associated with an objective, users must specify a proficiency level whenever they select the objective. For example, when assigning an objective to a course or to a learner, the user must specify the proficiency level of the objective.

Setting Up Rating Models

If you integrate with a human resources system, import rating models through EIPs. Enterprise Learning Management receives the rating model's effective date, description, review ratings (proficiencies in Enterprise Learning Management), review points, and numeric ratings. Anytime an existing rating model is changed or a new rating model is added in the human resources system, that rating model is imported through the subscription RATING_MODEL EIP.

After you import rating models, use the Rating Model page to verify that the information imported as expected. For imported rating models, you can modify only the rating model description fields in Enterprise Learning Management.

If you don't integrate with a human resources system, you must create new rating models. The system requires that you specify a numeric rating when you create rating models.

Warning! Objective assignments always use the latest effective-dated rating model. Modifying a rating model (other than the description fields) after an objective that uses it is assigned to a learner can compromise data integrity.

Prerequisite

If you integrate with an external human resources system, you must import rating models using the RATING_MODEL_FULLSYNC message before you can review rating models.

Related Links

Understanding Objective and Profile EIPs

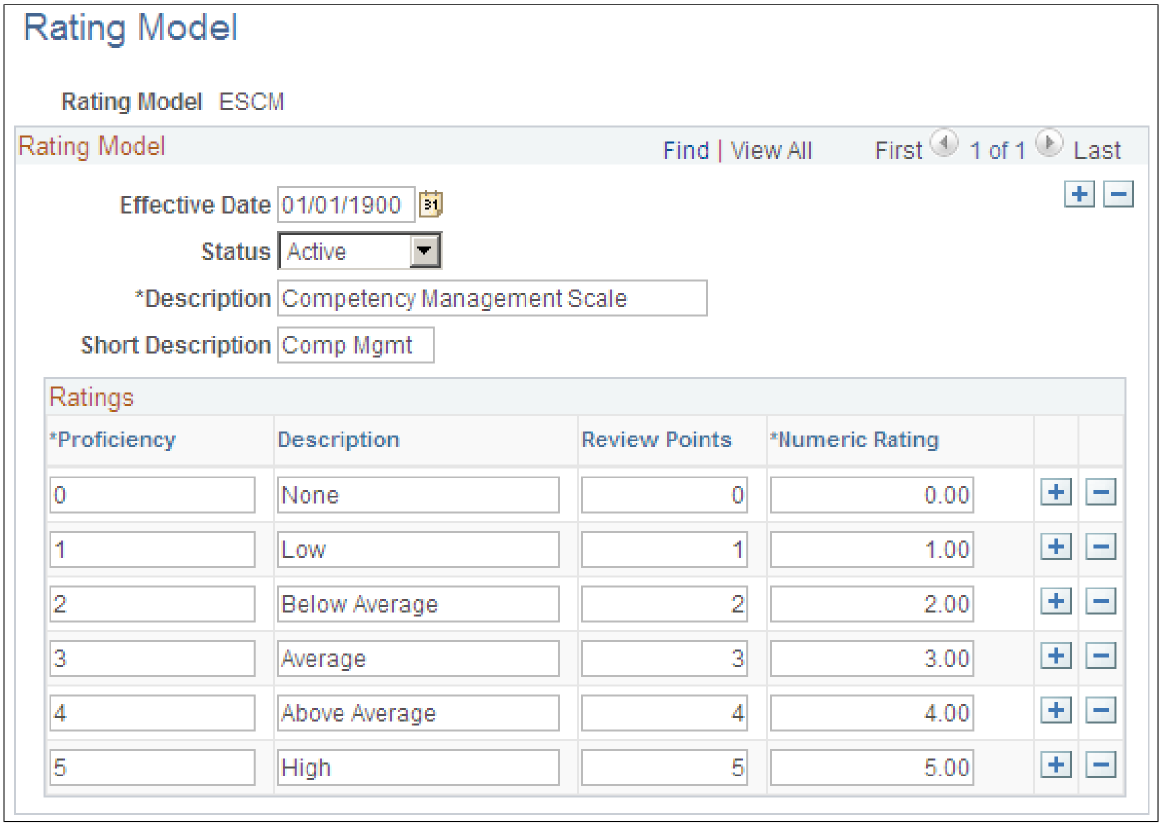
Rating Model Page

Use the Rating Model page (LM_RTNG_MDL_TBL) to create rating models and review and edit imported rating models.

Navigation:

Set Up ELM > **Objectives** > **Rating Models** > **Rating Model**

This example illustrates the fields and controls on the Rating Model page.



Note: If you import rating models from a human resources system, you can edit only the description fields for the rating model and proficiency levels. All other fields are display-only.

Field or Control	***Description***
Effective Date	Enter an effective date. Rating models do not appear in prompts on system pages until the effective date is met.
Status	Select a status of **Active** or **Inactive.** Only active rating models appear in prompts on system pages.
Proficiency	Enter an alphabetic or numeric code for the proficiency. The system uses proficiencies for gap analysis. Enterprise Learning Management proficiencies are equivalent to review ratings in a human resources system. When you import rating models from an external human resources system, the review rating values appear here.
Description	Enter a proficiency description. The proficiency descriptions that you enter here appear as field values whenever a user is required to select a proficiency for an objective in the system that uses this rating model.

Field or Control	*Description*
Review Points	Enter a whole number from *0* to *999* for the rating. The system uses review points for gap analysis. A higher review point value equals a higher proficiency. For example, the system interprets a review point value of *3* as a lower proficiency than a review point value of *6*.
Numeric Rating	Enter a numeric value for the rating. If you create the rating model in Enterprise Learning Management, the system requires that you enter a numeric rating. You can enter decimals and whole numbers. The system uses numeric ratings for gap analysis. A higher numeric rating equals a higher proficiency. For example, the system interprets a numeric rating of *3* as a lower proficiency than a numeric rating of *6*.

Reviewing Imported Job Role Competency Data

Page Used to Review Imported Job Role Competency Data

Page Name	*Definition Name*	*Usage*
Review Learner Competencies Page	LM_LRNR_COMP	Review imported learner competency data.
Review Job Role Competencies Page	LM_ROLE_COMPS	Review imported job role competency data.
Review Person Profile Data Page	LM_PERSON_PROFILE	Review imported person profile data.
Review Non-person Profile Data Page	LM_NONPERS_PROFILE	Review imported non-person profile data.

Understanding Imported Job Role Competency Data

When you import objective data from PeopleSoft HCM, you also import job role competency data. This enables the system to perform gap analysis for organizations that attach competencies at the job code or position number level in PeopleSoft HCM.

Related Links

Understanding Gap Analysis

Prerequisite

Before you can review imported job role competency data, you must run all the Profile Management-related messages that are part of the process of importing objective data from PeopleSoft HCM. See Importing Objectives from PeopleSoft HCM

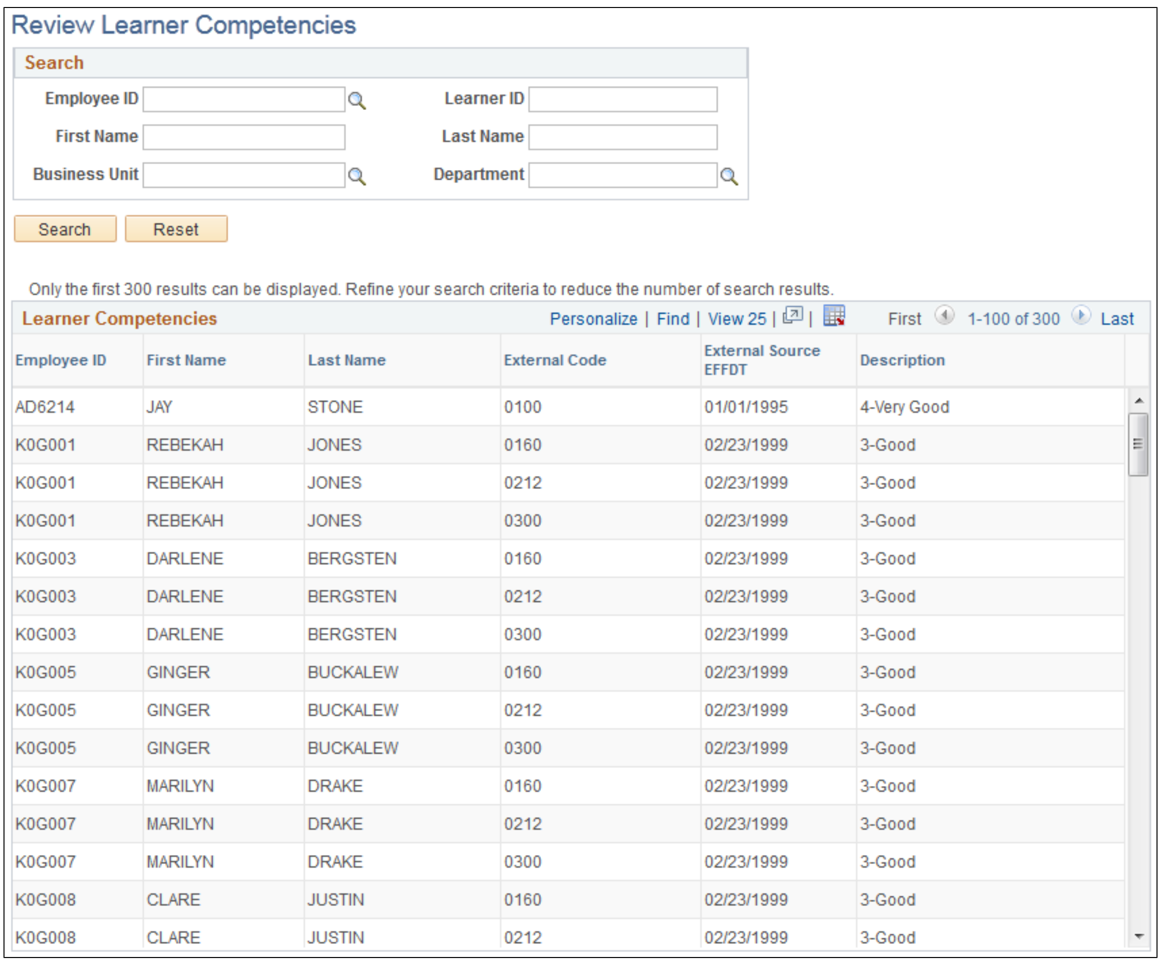
Review Learner Competencies Page

Use the Review Learner Competencies page (LM_LRNR_COMP) to review imported learner competencies.

Navigation:

Enterprise Learning > **Learning Objectives** > **Review Learner Competencies**

This example illustrates the fields and controls on the Review Learners Competencies page.



Use the fields in the Search group box to filter the data displayed on this page by **Employee ID**, **Learner ID**, **First Name**, **Last Name**, **Business Unit**, and **Department.**

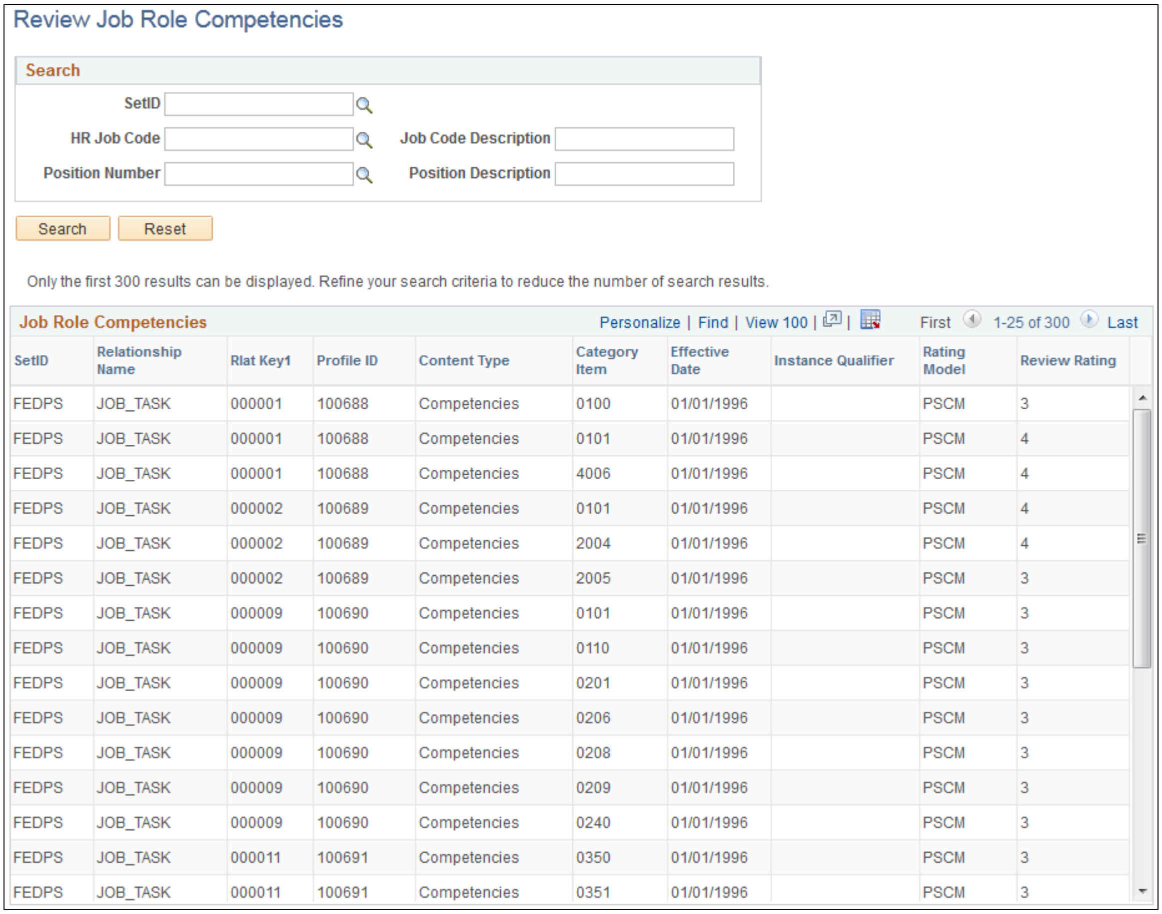
Review Job Role Competencies Page

Use the Review Job Role Competencies page (LM_ROLE_COMPS) to review imported job role competency data.

Navigation:

Enterprise Learning > **Learning Objectives** > **Review Job Role Competencies**

This example illustrates the fields and controls on the Review Job Role Competencies page.



SetID	Relationship Name	Rlat Key1	Profile ID	Content Type	Category Item	Effective Date	Instance Qualifier	Rating Model	Review Rating
FEDPS	JOB_TASK	000001	100688	Competencies	0100	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000001	100688	Competencies	0101	01/01/1996		PSCM	4
FEDPS	JOB_TASK	000001	100688	Competencies	4006	01/01/1996		PSCM	4
FEDPS	JOB_TASK	000002	100689	Competencies	0101	01/01/1996		PSCM	4
FEDPS	JOB_TASK	000002	100689	Competencies	2004	01/01/1996		PSCM	4
FEDPS	JOB_TASK	000002	100689	Competencies	2005	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000009	100690	Competencies	0101	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000009	100690	Competencies	0110	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000009	100690	Competencies	0201	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000009	100690	Competencies	0206	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000009	100690	Competencies	0208	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000009	100690	Competencies	0209	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000009	100690	Competencies	0240	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000011	100691	Competencies	0350	01/01/1996		PSCM	3
FEDPS	JOB_TASK	000011	100691	Competencies	0351	01/01/1996		PSCM	3

Use the fields in the Search group box to filter the data displayed on this page by **Set ID**, **HR Job Code**, **Job Code Description**, **Position Number**, and **Position Description.**

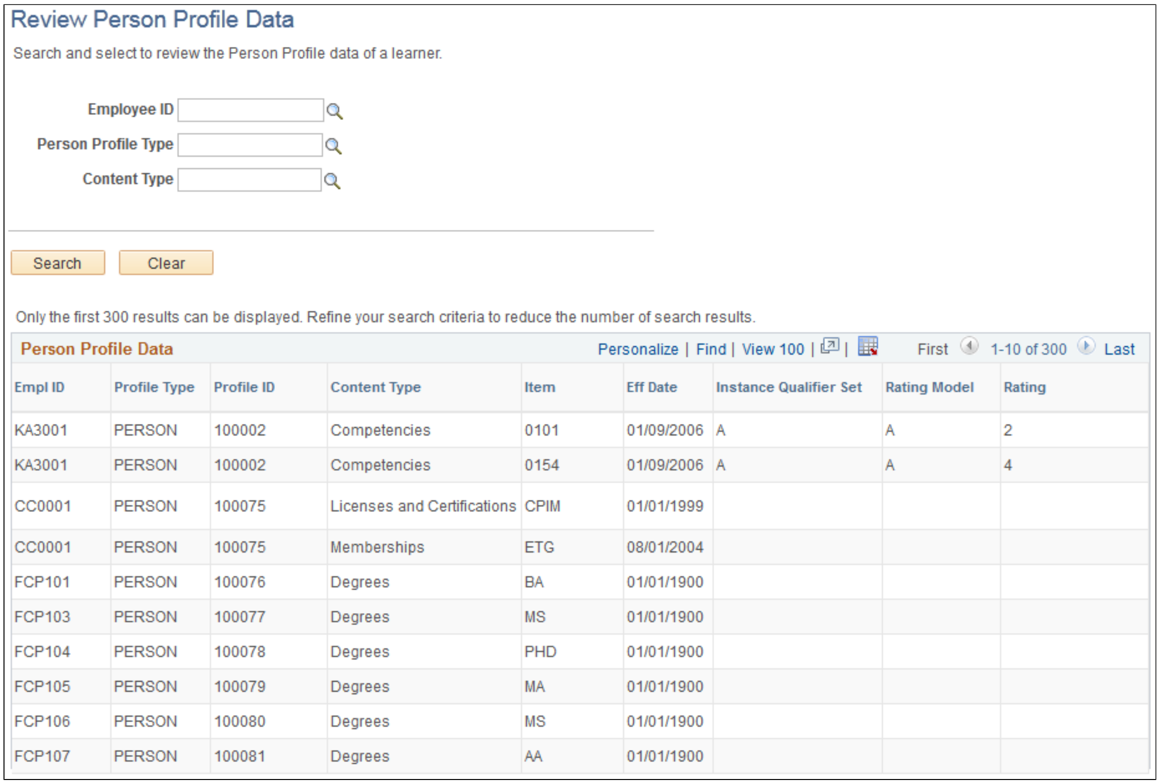
Review Person Profile Data Page

Use the Review Person Profile Data page (LM_PERSON_PROFILE) to review imported person profile data.

Navigation:

Enterprise Learning > **Learning Objectives** > **Review Person Profile Data**

This example illustrates the fields and controls on the Review Person Profile Data page.



Empl ID	Profile Type	Profile ID	Content Type	Item	Eff Date	Instance Qualifier Set	Rating Model	Rating
KA3001	PERSON	100002	Competencies	0101	01/09/2006	A	A	2
KA3001	PERSON	100002	Competencies	0154	01/09/2006	A	A	4
CC0001	PERSON	100075	Licenses and Certifications	CPIM	01/01/1999			
CC0001	PERSON	100075	Memberships	ETG	08/01/2004			
FCP101	PERSON	100076	Degrees	BA	01/01/1900			
FCP103	PERSON	100077	Degrees	MS	01/01/1900			
FCP104	PERSON	100078	Degrees	PHD	01/01/1900			
FCP105	PERSON	100079	Degrees	MA	01/01/1900			
FCP106	PERSON	100080	Degrees	MS	01/01/1900			
FCP107	PERSON	100081	Degrees	AA	01/01/1900			

You can filter the data displayed on this page by **Employee ID**, **Person Profile Type**, and **Content Type.**

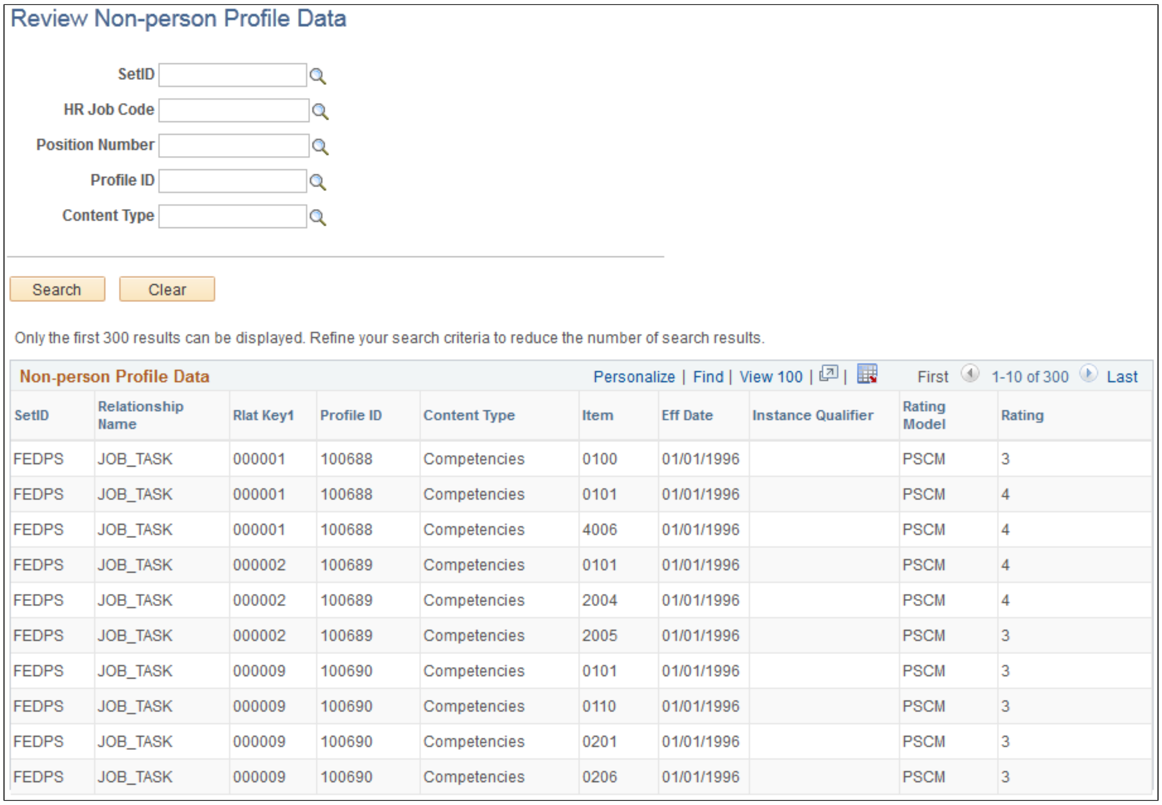
Review Non-person Profile Data Page

Use the Review Non-person Profile Data page (LM_NONPERS_PROFILE) to review imported non-person profile data.

Navigation:

Enterprise Learning > **Learning Objectives** > **Review Non-person Profile Data**

This example illustrates the fields and controls on the Review Non-person Profile Data page.



You can filter the data displayed on this page by **Set ID**, **HR Job Code**, **Position Number**, **Profile ID**, and **Content Type.**

Defining and Reviewing Objectives

To define and review learning objectives and global learning objectives, use the Objective Definition (LM_OBJV_TBL) component.

Page Used to Define Objectives

Page Name	***Definition Name***	***Usage***
Objectives Page	LM_OBJV_TBL	Define objectives and review and edit imported objectives.

Understanding Objectives Setup

Enterprise Learning Management supports two types of learning objectives: objectives that are targeted to individual learners, and broader global objectives that can be tied to an organization's training plans. To create learning objectives, you can either import objectives from a human resources application, or define them manually in Enterprise Learning Management. This topic focuses on manual setup of individual and global objectives.

Manually Defining Objectives

To manually define objectives:

1. Access the Objectives page.
2. (Optional) Select a rating model.

   If you select a rating model, users are required to specify a proficiency level for the objective whenever they select the objective. For example, when users assign the objective to a course, program, supplemental learning, job code, position number, or to a learner, they must specify the proficiency level of the objective.
3. Enter an objective code value and descriptions, and specify whether to display the objective to learners and managers.
4. (Optional) To enable the objective to be used within training plans, select the Global Objective check box.

   Global objectives are not visible to learners when they search the catalog.
5. Save the objective.
6. Build or update the catalog index for objectives.

Updating Imported Objectives

To update objectives created through the import process:

1. Access the Objectives page.
2. Update the description fields, as needed, and specify whether to display the objective to learners and managers.
3. (Optional) To enable the objective to be used within training plans, select the Global Objective check box.
4. Save your changes.
5. Build or update the catalog index for objectives.

Related Links

Building and Updating the Search Index for Objectives

Prerequisite

Before you can manually define objectives that have associated rating models, you must create rating models.

Related Links

Creating and Reviewing Rating Models

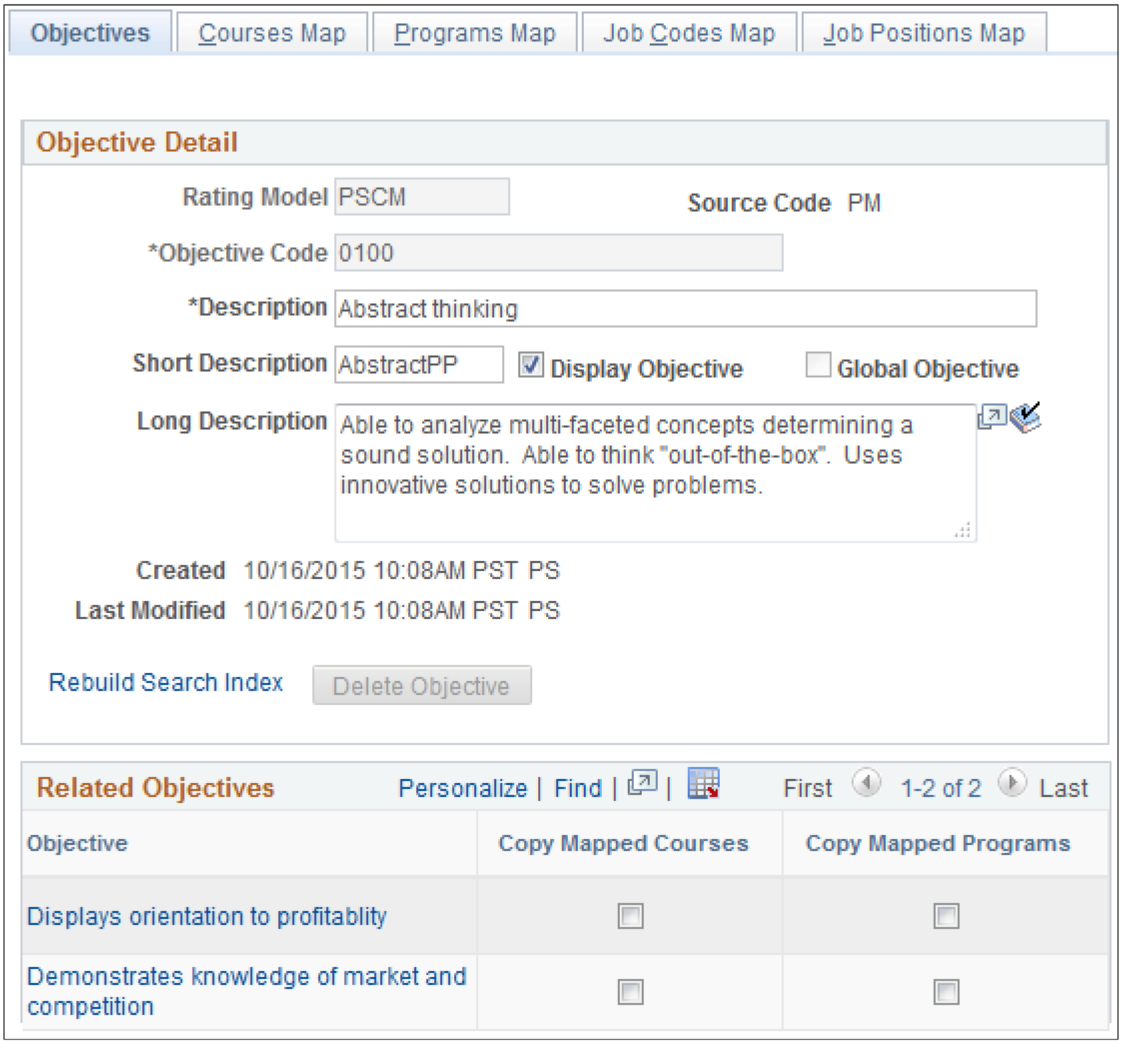
Objectives Page

Use the Objectives page (LM_OBJV_TBL) to define objectives and review and edit imported objectives.

Navigation:

Enterprise Learning > **Learning Objectives** > **Define Learning Objectives** > **Objectives**

This example illustrates the fields and controls on the Objectives page.



If you are adding a new objective, the mapping pages of this component appear after you save the objective definition. The system updates these pages automatically to show the courses, programs, job codes, and positions to which the objective has been assigned.

Objective Detail

Note: If you import competencies from an external human resources system and automatically map them to objectives, you can edit only the description, Display Objective, and Global Objective fields. All other fields are display-only.
When you make changes to any of the fields on this page, or add or delete an objective, you must rebuild the catalog index for objectives before the changes are reflected in the learning catalog.

Field or Control	***Description***
Rating Model	Select a rating model if you are manually defining the objective. If you do not select a rating model, users do not need to specify a proficiency level when they assign the objective to a course, program, supplemental learning, job code, position number, or to a learner. Define rating models on the Rating Model page. If you imported the objective from an external human resources system, the imported rating model appears in this field and cannot be edited.
Objective Code	Enter an alphanumeric objective code if you are manually defining the objective. If you integrate with a human resources system, the system creates the objective code for each human resources competency using the human resources competency's code.
Description	Enter a description of the objective. For automatically mapped objectives, the system populates this field by default with the external description value in the Objectives External Source table, when you run the sync or full sync process EIP.
Display Objective	Select to display this objective to learners and managers on self-service pages. The system selects this check box by default. Deselect the check box to hide the objective from lists of available objectives. For example, you may want to hide many of the system-generated objectives when there are no classes or programs to support them.
Global Objective	Select if this is a broad objective for your organization. Global objectives are useful when you create training plans. You can associate global objectives with courses and programs, then generate training plans that report actual and planned learning that supports those objectives. Global objectives are not visible to learners when they search the catalog. When you select this option, the Display Objective option becomes unavailable.
Long Description	The system populates this field for automatically mapped objectives from an external human resources system. The information that you enter here appears on the Objectives Detail page.

Field or Control	***Description***
Rebuild Search Index	Click to access the Rebuild Indexes page, where you can create or update the search index for objectives. Update this index every time that you add or delete objectives or make changes on this page to existing objectives. You can also update the search index directly through the Rebuild Indexes page. (If you are adding a new objective, this link appears only after you save the objective.) See Building and Updating the Search Index for Objectives.
Delete Objective	Click to delete the objective. You cannot delete objectives after they have been assigned to learners.

Related Objectives

This group box appears only for objectives imported from PeopleSoft HCM that have related objectives or sub-items. It lists all the related objectives for the parent objective that you are reviewing.

For more information about related objectives, see Understanding Objectives.

Field or Control	***Description***
Objectives	Click to access the Objectives Detail page where you can view detailed information about the related objective.
Copy Mapped Courses	Select to map the courses that are currently mapped to the parent objective to this related objective. The system performs this mapping when you click Save.
Copy Mapped Programs	Select to map the programs that are currently mapped to the parent objective to this related objective. The system performs this mapping when you click Save.

Building and Updating the Search Index for Objectives

To build and update the search index for objectives, use the Rebuild Indexes (PTSF_SCHEDULE) component.

Page Used to Build and Update the Search Index for Objectives

Page Name	***Definition Name***	***Usage***
Build Search Index Page	PTSF_SCHEDULE_SI	Build or update the catalog index for objectives.

Understanding Search Index Updates for Objectives

The search engine delivered with Enterprise Learning Management enables users to search for and assign objectives to learners through the following pages:

- Add New Objective page in employee and manager self-service.
- Add Objectives to Get Credit For page that's used to record supplemental learning in employee and manager self-service.
- Assign Objectives - Search for Objectives page in the Assign Objectives (LM_MASS_ASGN_OBJV) component.

During implementation, you must build the search index after you create objectives. Later, each time that you add or delete objectives or make changes to existing objectives on the Objectives page, you must update the index. Otherwise, users will not see the changes when they search for objectives. For example, if you add an objective, the objective will appear in the search results only after you update the index.

To build or update the search index for objectives, run the PTSF_GENFEED Application Engine process.

Related Links

Understanding PeopleSoft Search Framework Implementation for ELM

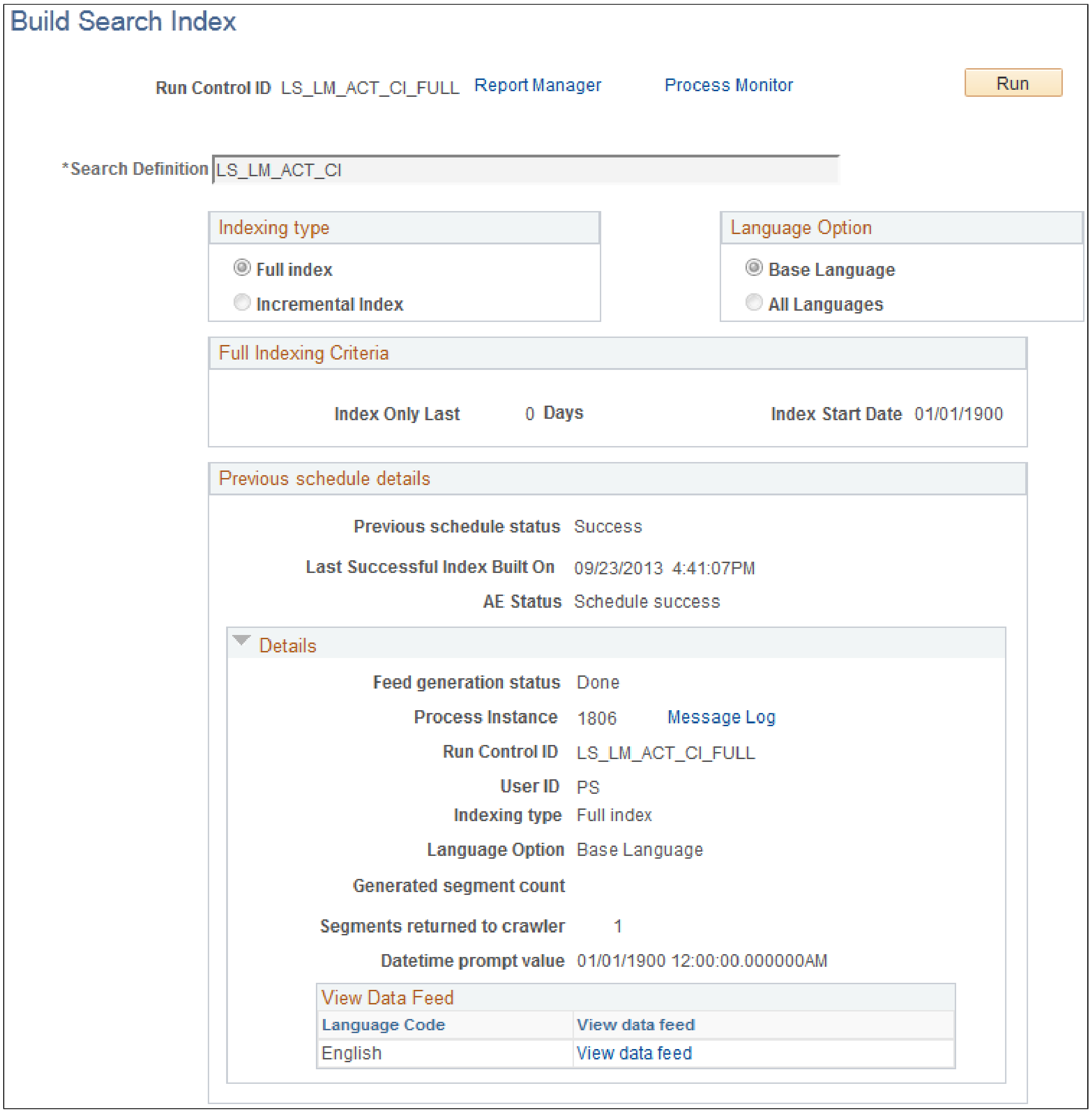
Build Search Index Page

Use the Build Search Index page (PTSF_SCHEDULE_SI) to build or update the catalog index for objectives.

Navigation:

Enterprise Learning > **Catalog** > **Rebuild Indexes** > **Build Search Index**

This example illustrates the fields and controls on the Build Search Index page.



Field or Control	*Description*
Search Definition	Select the LS_LM_OBJV definition to build the objectives index.
Full Index	Select to create a new full index. If an index already exists, the process overwrites it.
Incremental Index	Select to update an existing index. The system updates an index with any changes made since the last time the index was successfully created or updated.
Base Language	Select to build or update the index for only the base language.

Field or Control	*Description*
All Languages	Select to build or update the index for all enabled languages.

See the product documentation for *PeopleTools: Process Scheduler*.

Assigning Objectives to Jobs and Position Numbers

Pages Used to Assign Objectives to Job Codes and Position Numbers and View Assignments

Page Name	*Definition Name*	*Usage*
Define Job Code Objectives Page	LM_JOB_OBJV_2	Assign objectives to job codes.
Define Position Objectives Page	LM_POSITION_OBJV_2	Assign objectives to position numbers.
Process Job Role Objectives Page	LM_RUNCTL_OBJV_PG	Run the Process Job Role Objectives process to initiate the gap analysis process for future-dated objective assignments to job codes and position numbers.
Job Codes Map Page	LM_OBJV_JOB_MAP	Review job codes that are mapped to objectives.
Job Positions Map Page	LM_OBJV_POSN_MAP	Review position numbers that are mapped to objectives.

Understanding Association of Objectives with Job Codes and Position Numbers

When you integrate with an external human resources system, you import job codes, position numbers, competencies, job role competencies, and person competencies through EIPs. The system uses this information to perform gap analysis and automatically assign objectives to learners based on job role requirements.

You can manually map objectives to job codes and position numbers if you need to assign objectives to a job code or position number outside of the requirements that are defined in your human resources system or if you do not import job role competencies from the human resources system.

Note: If you do not integrate with a human resources system, and you want to map objectives to jobs and position numbers, you must import job codes, position numbers, and learners' job codes and position numbers from another application.

Triggering the Gap Analysis Process

When you manually map objectives to job codes and positions, and save your changes, the system triggers the gap analysis process, assigning objectives to learners to fulfill learning gaps. To initiate the gap analysis process for future-dated objective assignments, you must run the Process Job Role Objectives process, which causes the system to perform gap analysis for any objectives mapped to job codes and position numbers that have met their effective date since the last run of the process.

Note: Administrators can assign objectives to a job code or position number through group or mass objective assignment; however, this is a one-time only association. Any learners who are assigned the job code or position number after the group or mass objective assignment process runs are not assigned the objective.

See Managing Group and Mass Objective Assignments.

Removing Objectives from Job Codes and Positions

If you remove an objective from a job code or position number, the system deletes the objective from the learners current objectives record provided that the objective does not have any other association with the learner—for example, the objective was not also assigned by an administrator as a required objective for the learner. In addition, the system deletes only objectives with a status of Needed. The system does not delete objectives with a status of in progress or met.

Related Links

Understanding Gap Analysis

Prerequisites

Before you can map objectives to job codes and position numbers, you must:

1. Import job codes and position numbers through EIPs.
2. Define objectives.

Related Links

Understanding Person and Organization EIPs
Defining and Reviewing Objectives

Define Job Code Objectives Page

Use the Define Job Code Objectives page (LM_JOB_OBJV_2) to assign objectives to job codes.

Navigation:

Enterprise Learning > Learning Objectives > Define Job Code Objectives > Define Job Code Objectives

This example illustrates the fields and controls on the Define Job Code Objectives page.

Note: When you save the page, the system triggers the gap analysis process. When applicable, the objectives will also be assigned to learners who are added to the system after the gap analysis process runs.

Field or Control	***Description***
Objective Code	Select an objective code to assign. The system displays the description.
Effective Date	Select an effective date. If the effective date that you enter is future-dated, you must run the Process Job Role Objectives process to initiate the gap analysis process for the objective assignment. See Process Job Role Objectives Page.
Status as of Effective Date	Values are: • *Active:* Select to have the system assign the objectives to learners with this job code or position number. • *Inactive:* Select if you do not want the system to assign the objectives to learners with this job code or position number. Use this option if you no longer want to assign these objectives to new learners that are assigned this job code or position number.
Proficiency	Select the proficiency level of the objective if the objective is associated with a rating model.

Define Position Objectives Page

Use the Define Position Objectives page (LM_POSITION_OBJV_2) to assign objectives to position numbers.

Navigation:

Enterprise Learning > **Learning Objectives** > **Define Position Objectives** > **Define Position Objectives**

This page is similar to the Define Job Code Objectives page.

Note: When you save the page the system triggers the gap analysis process.

See Define Job Code Objectives Page.

Process Job Role Objectives Page

Use the Process Job Role Objectives page (LM_RUNCTL_OBJV_PG) to run the Process Job Role Objectives process to initiate the gap analysis process for future-dated objective assignments to job codes and position numbers.

Navigation:

Enterprise Learning > **Learning Objectives** > **Process Job Role Objectives** > **Process Job Role Objectives**

Click **Run** to run this request. Process Scheduler runs the Process Job Role Objectives process at user-defined intervals.

Note: Run the Process Job Role Objectives process during off-peak business hours.

See the product documentation for *PeopleTools: Process Scheduler*

Assigning Objectives to Courses and Programs

Pages Used to Assign Objectives to Courses and Programs and View Assignments

Page Name	***Definition Name***	***Usage***
Maintain Courses - Attributes Page	LM_CI_ATTRIB_PG	Assign objectives to courses.
Maintain Programs - Attributes Page	LM_PRG_ATTRIB_PG	Assign objectives to programs.
Courses Map Page	LM_OBJV_CI_MAP	Review courses that are mapped to objectives.

Page Name	Definition Name	Usage
Programs Map Page	LM_OBJV_PRGM_MAP	Review programs that are mapped to objectives.

Understanding Objectives Association to Courses and Programs

One of the final steps in objectives setup is assigning objectives to courses and programs. Learners can then search the catalog to locate and enroll in the classes or register in the programs that fulfill their outstanding objectives.

Mapped Objectives and Enrollment

Enrolling or registering in a class or program that has objectives does not cause the system to assign the objectives to the learner. Objectives can only be assigned to learners through the gap analysis process, by administrators, or through the self-service pages. When objectives are assigned, they have a status of needed.

When a learner enrolls in a class or registers in a program that will meet needed objectives, the system updates the status of the learner's objectives to in progress. The status changes to met when the learner successfully completes the learning. Should the learner drop the class or program prior to completing it, the status of the objective reverts to needed. The status also reverts to needed if an administrator drops the learner from the class or program after the learner completes it.

Program objectives are specific to each program registration and are evaluated per program, regardless of whether the learner met the objective or is meeting the objective in another program.

Prerequisites

Before you can assign objectives to courses and programs, you must:

1. Create courses.

   See Creating Courses.

2. Create programs.

   See Defining Programs.

3. Define Objectives.

   See Defining and Reviewing Objectives.

4. Build the catalog index for courses, programs, and objectives.

   See Updating the Catalog Indexes.

Maintain Courses - Attributes Page

Use the Maintain Courses - Attributes page (LM_CI_ATTRIB_PG) to assign objectives to courses.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Courses** > **Attributes**

Field or Control	***Description***
Objective Code	Select the objective. The system automatically displays the description.
Proficiency	If the objective is associated with a rating model, select the proficiency level of the objective. ***Warning!*** Changing the proficiency after the objective is assigned to learners can cause learners who have completed the same class or program to be given a different proficiency level.

Related Links

Maintain Courses - Attributes Page

Maintain Programs - Attributes Page

Use the Maintain Programs - Attributes page (LM_PRG_ATTRIB_PG) to assign objectives to programs.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Programs**

Search for the program and select Attributes.

Related Links

Maintain Programs - Attributes Page

Managing Group and Mass Objective Assignments

Pages Used to Manage Group and Mass Objective Assignments

Page Name	***Definition Name***	***Usage***
Assign Learning Objectives (Find Requester) Page	LM_ASGN_OBJV_REQ	Search for, identify, and select people who submit objective assignment requests.
Assign Learning Objectives (Search for Objectives) Page	LM_ASGN_OBJV_OBJV	Select an objective to assign to learners.

Page Name	*Definition Name*	*Usage*
Assign Objectives - Find Learners page	LM_OBJV_FND_LRNR	Search for learners for whom the requester wants to assign the objective.
Assign Objectives - Select Learners Page	LM_ASSGN_SEL_LRNR	Select learners and assign objectives.
Group Assignment - Warning Page	LM_OBJV_WARNING	Schedule a mass objective assignment request.
Assign Objectives - Mass Assignment Page	LM_MASS_OBJV_LRNR	Enter information for and submit mass objective assignment requests.
Process Mass Assignments Page	LM_MASS_OBJV_RNCTL	Process mass objective assignment requests.

Understanding Group and Mass Objective Assignments

Group objective assignment enables you to assign an objective to multiple learners in one operation, as opposed to assigning objectives to one learner at a time and repeating the process for every learner. For example, you can assign an objective to all learners in a particular department or customer organization, or to all learners that hold a specific job or position. This objective assignment is a one-time association only. For example, if you assign an objective to all learners in a specific department, the system does not assign the objective to learners who are added to that department at a later date.

To process a group objective assignment:

1. Identify and select the requester who is submitting or authorizing the group objective assignment.
2. Search for and select the objective that the requester wants to assign.

   Note: You must also specify the proficiency level for the objective if you associated a rating model with the objective.

3. Search for learners based on criteria that the requester provides.
4. Select the final group of learners that the requester requires.
5. Submit the group objective assignment request.

Depending on your needs, using group objective assignment for more than 20 or 30 learners can become time consuming and cumbersome. Mass objective assignment provides a more efficient method of handling large volume objective assignments. Mass objective assignment enables you to submit one request for a large number of learners, and you do not have to wait for the request to finish. The system triggers the mass objective assignment option during a group objective assignment when you attempt to assign objectives to more learners than the number that you specify in the Objectives Group Assignment Maximum field on the Install Defaults - General page. In this case, the system prompts you to submit a mass objective assignment request or to return to the Assign Objectives - Find Learners page to narrow the search results to remain within the Objectives Group Assignment Maximum limit.

To process a mass objectives assignment:

1. Select to schedule a mass objectives assignment request when prompted during group objective assignment.
2. Enter information for the mass objective assignment request.
3. Submit the mass objective assignment request.
4. Run the Run Mass Assignment Application Engine process (LM_MASS_OBJV) to process the mass objective assignment request and assign the objective to the learners.

When you submit a group objective assignment request or run the Run Mass Assignment process, the system adds the objective with a needed status to the Learning Objectives - Current Objectives page of all learners who have not yet completed the objective at the same or higher proficiency level. If learners are already enrolled or registered in classes or programs that are associated with the objective at the same or higher proficiency level, the systems adds the objective with a status of in progress. If learners have already completed a class, program, or supplemental learning that meets the objective at the same or higher proficiency level, the system adds the objective to the learners' Learning Objectives - Objectives History page with a status of met.

Prerequisites

Before using the mass or group assignment features, make sure the following settings are appropriate for your organization:

- Objectives group assignment maximum

  During group objective assignment, if the group of learners exceeds the maximum number, the system warns the administrator. The administrator can continue with the assignment for learners up to the maximum, switch to mass objective assignment, or refine the group criteria to achieve a group that is within the limits. Set the value for the Objectives Group Assignment Maximum field on the Install Defaults - General page. The delivered value is 30.

- Commit frequency

  Use the Commit Frequency page to specify the number of records (learners) you want the system to process during the Run Mass Assignment (LM_MASS_OBJV) process before committing changes to the database. The default value is 50.

Related Links

Defining the Batch Processing Commit Frequency

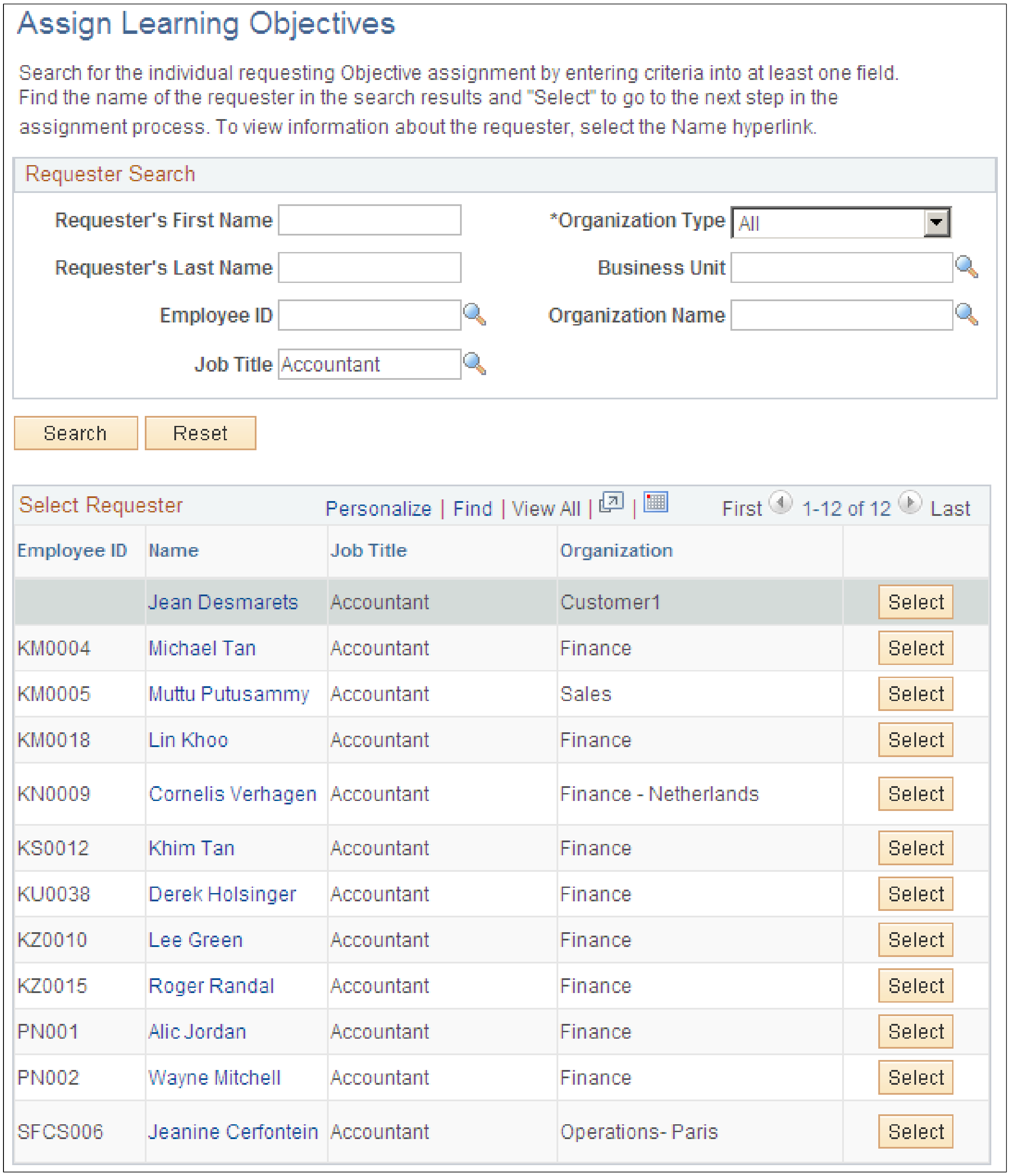
Assign Learning Objectives (Find Requester) Page

Use the Assign Learning Objectives (find requester) page (LM_ASGN_OBJV_REQ) to search for, identify, and select people who submit objective assignment requests.

Navigation:

Enterprise Learning > **Learning Objectives** > **Assign Learning Objectives** > **Assign Learning Objectives**

This example illustrates the fields and controls on the Assign Learning Objectives (find requester) page.



Requester Search

Use this group box to enter search criteria to search for a requester. Click Search to display the search results, and click Reset to clear the search criteria fields.

Field or Control	***Description***
Requester's First Name and **Requester's Last Name**	Enter the full or partial first name or last name of the requester.

Field or Control	***Description***
Organization Type	Select an organization type. Values are: • *All*: Includes departments and customer organizations. • *Customer*: Customer organizations only. • *Department*: Departments only.
Business Unit	Select a business unit. This field is available only if you select *Department* in the Organization Type field.
Organization Name	Select a department or customer organization. This field appears only if you select *All* in the Organization Type field.
Customer Name	Select a customer organization. This field appears only if you select *Customer* in the Organization Type field.
Department Name	Select a department. This field appears only if you select *Department* in the Organization Type field.

Select Requester

Use this group box to select a requester from the list of search results. The system sorts by employee ID. Click the Select button for a requester to display the Assign Objectives - Search for Objectives page.

Field or Control	***Description***
Name	Click the requester's name link to access the Learner Information page, which displays high-level job and contact information about the user.
Select	Click to access the Assign Learning Objectives (search for objectives) page.

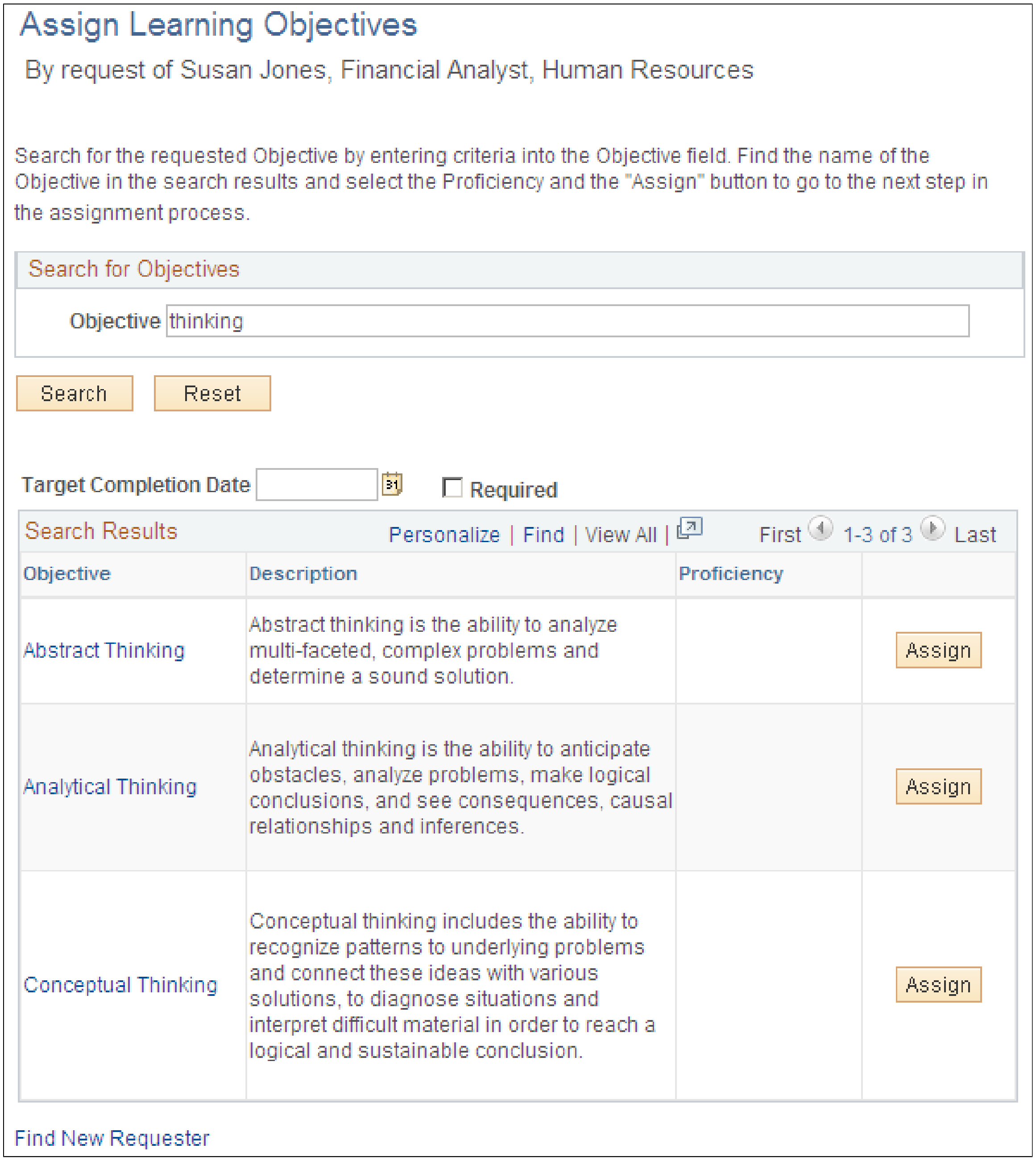
Assign Learning Objectives (Search for Objectives) Page

Use the Assign Learning Objectives (search for objectives) page (LM_ASGN_OBJV_OBJV) to select an objective to assign to learners.

Navigation:

Click the Select button for a requester on the Assign Objectives (find requester) page.

This example illustrates the fields and controls on the Assign Learning Objectives (search for objectives) page.



Search for Objectives

Enter the full or partial description of the objective that the requester wants to assign to learners and click Search to display the search results. Click Reset to clear the search criteria field.

Completion Instructions

The options that you select here affect what learners see on the self-service pages.

Field or Control	Description
Target Completion Date	Enter the target date for meeting the objective. This field is informational only.
Required	Select to specify that the objective is required. This field is informational only.

Search Results

Select an objective from the list of search results.

Field or Control	Description
Objective	Click an objective link to access the Objectives Detail page, which displays a description of the objective and a list of classes that meet the objective.
Description	Displays the long description of the objective that you enter on the Objectives page.
Proficiency	Select a proficiency that the requester wants the learners to obtain. You must select a proficiency level if a rating model is associated to the objective. Otherwise this field is unavailable. Define rating models on the Rating Model page.
Assign	Click to select the objective that the requester wants to assign to learners and to access the Assign Objectives - Find Learners page.

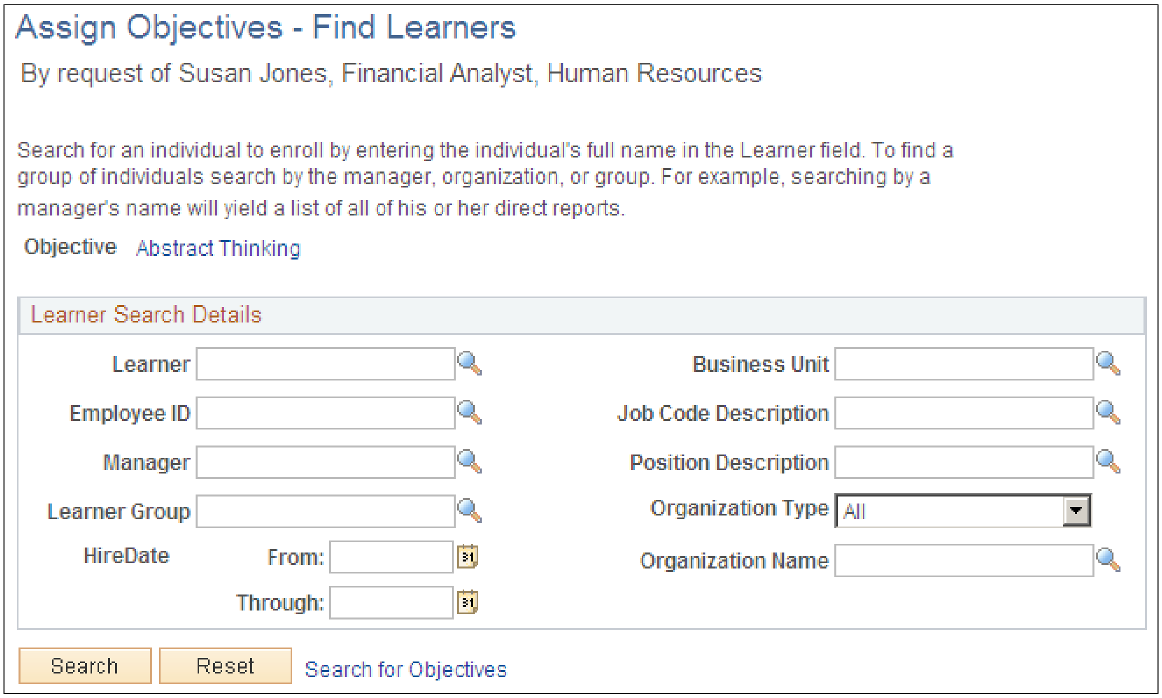
Assign Objectives - Find Learners page

Use the Assign Objectives - Find Learners page (LM_OBJV_FND_LRNR) to search for learners for whom the requester wants to assign the objective.

Navigation:

Click the Assign button for an objective on the Assign Learning Objectives (search for objectives) page.

This example illustrates the fields and controls on the Assign Objectives - Find Learners page.



Learner Search Details

Use this group box to search for learners. Enter search criteria and click Search to display the search results. Click Reset to clear the search criteria fields. If the number of learners that meet the search criteria is less than or equal to the value specified in the Objectives Group Assignment Maximum field on the Install Defaults - General page, the Assign Objectives - Select Learners page appears. If the number of learners that meet the search criteria is greater than the value specified in the Objectives Group Assignment Maximum field, the Group Assignment - Warning page appears.

Field or Control	***Description***
Learner Group	Select a learner group.
Hire Date, From, and Through	Enter dates in the From and Through fields to search for learners with a specific hire date.
Business Unit	Select a business unit to search for learners in a specific business unit.
Job Code Descr (job code description) and Position Descr (position description)	Select a job code or position description to search for learners with a specific job or position.

Field or Control	Description
Organization Type	Select an organization type if the requester is an internal learner. Values are: • *All*: Includes departments and customer organizations. • *Customer*: Customer organizations only. • *Department*: Departments only. This field is unavailable if the requester is an external learner.
Organization Name	Select a department or customer organization if the requester is an internal learner. If the requester is an external learner, this field is unavailable and displays the customer organization to which the requester belongs. This field is available only if you select *All* in the Organization Type field.
Customer Name	Select a customer organization. This field appears only if you select *Customer* in the Organization Type field.
Department Name	Select a department. This field appears only if you select *Department* in the Organization Type field.

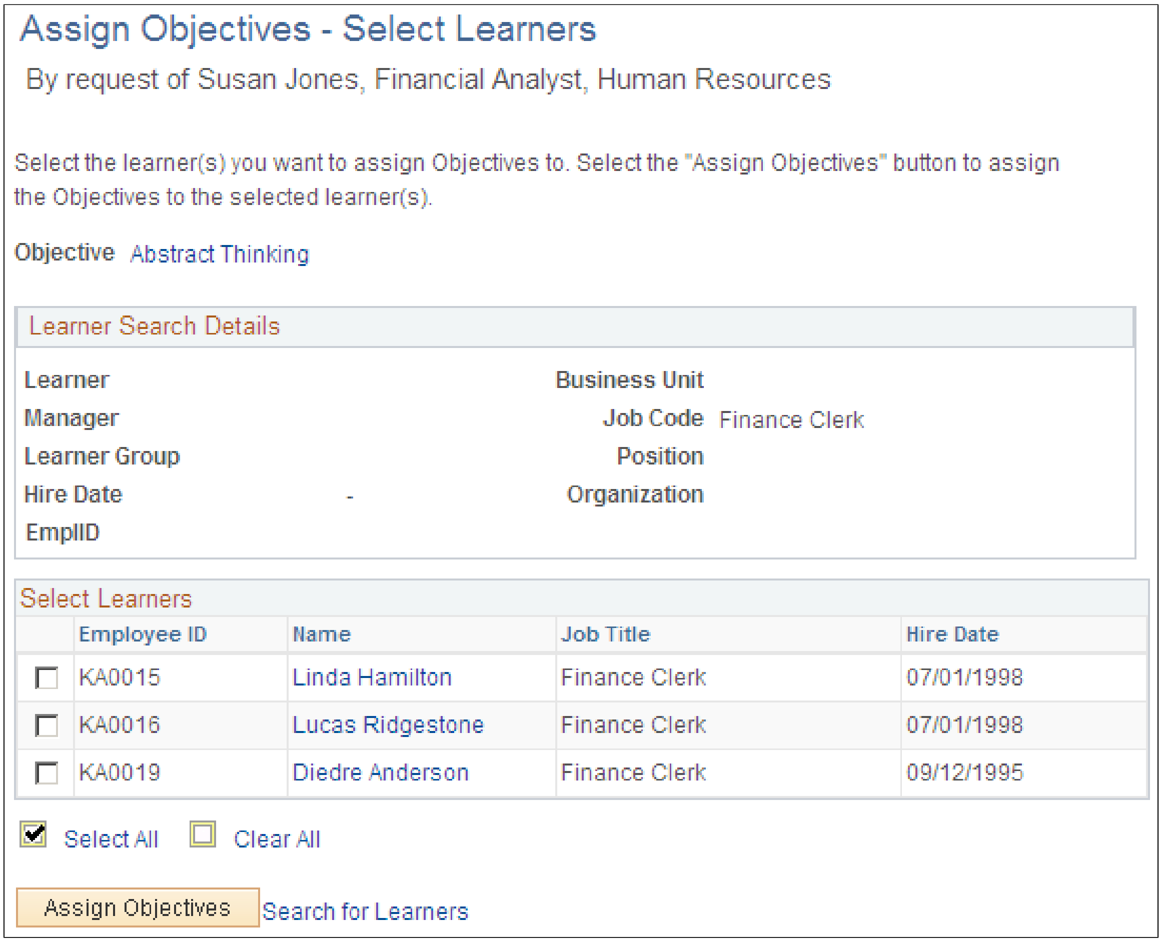
Assign Objectives - Select Learners Page

Use the Assign Objectives - Select Learners page (LM_ASSGN_SEL_LRNR) to select learners and assign objectives.

Navigation:

Click the Search button on the Assign Objectives - Find Learners page.

This example illustrates the fields and controls on the Assign Objectives - Select Learners page.



Note: This page appears if the number of learners that meet the search criteria on the Assign Objectives - Find Learners page is less than or equal to the value specified in the Objectives Group Assignment Maximum field on the Install Defaults - General page.

Learner Search Details

This group box displays the search criteria that you enter on the Assign Objectives - Find Learners page.

Select Learners

This grid displays all learners that meet the search criteria on the Assign Objectives - Find Learners page. Select the check box for each learner whom you want to include in the group objective assignment, or click Select All to select all learners.

Field or Control	***Description***
Name	Click the learner's name link to access the Learner Information page, which displays high-level job and contact information about the user.

Field or Control	***Description***
Assign Objectives	Click to assign the objective to the learners that you select.

Assignment of Objectives

This group box appears only after you click the Assign Objectives button and displays a message that confirms the objectives are assigned.

Field or Control	***Description***
Search for Learners	Click to access the Assign Objectives - Find Learners page, where you can refine the search for learners or enter new search criteria.

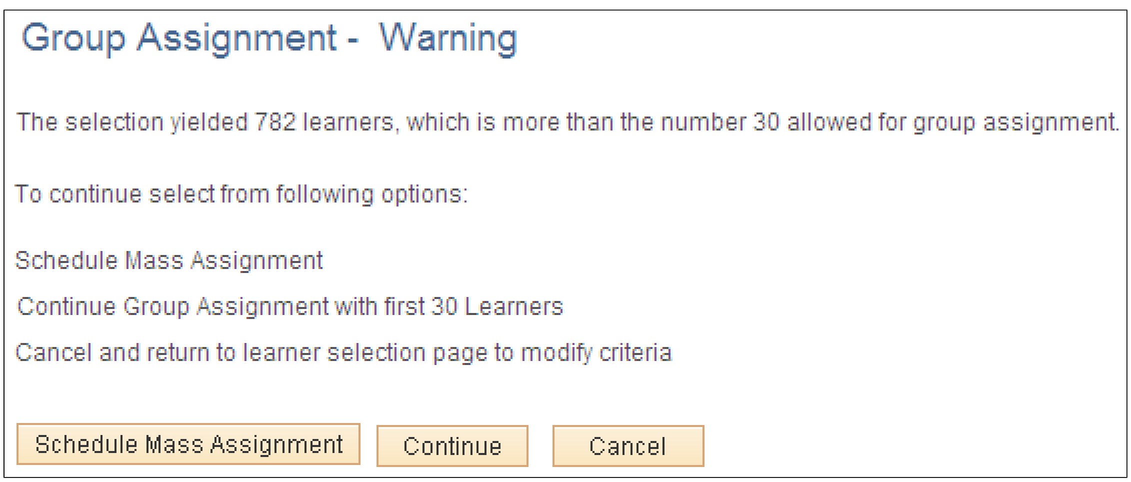
Group Assignment - Warning Page

Use the Group Assignment - Warning page (LM_OBJV_WARNING) to schedule a mass objective assignment request.

Navigation:

Click the Search button on the Assign Objectives - Find Learners page.

This example illustrates the fields and controls on the Group Assignment - Warning page.



Note: This page appears if the number of learners that meet the search criteria on the Assign Objectives - Find Learners page is greater than the value specified in the Objectives Group Assignment Maximum field on the Install Defaults - General page.

Field or Control	*Description*
Schedule Mass Assignment	Click to create a mass objective assignment request. This includes all learners who match the search criteria.
Continue	Click to continue group objective assignment. The Assign Objectives - Select Learners page appears. The system displays only the number of users that you specify in the Objectives Group Assignment Maximum field. If the Objectives Group Assignment Maximum field limits you to five learners, the system displays only the first five learners that meet the search criteria on the Assign Objectives - Select Learners page.
Cancel	Click to return to the Assign Objectives - Find Learners page, where you can modify the search criteria.

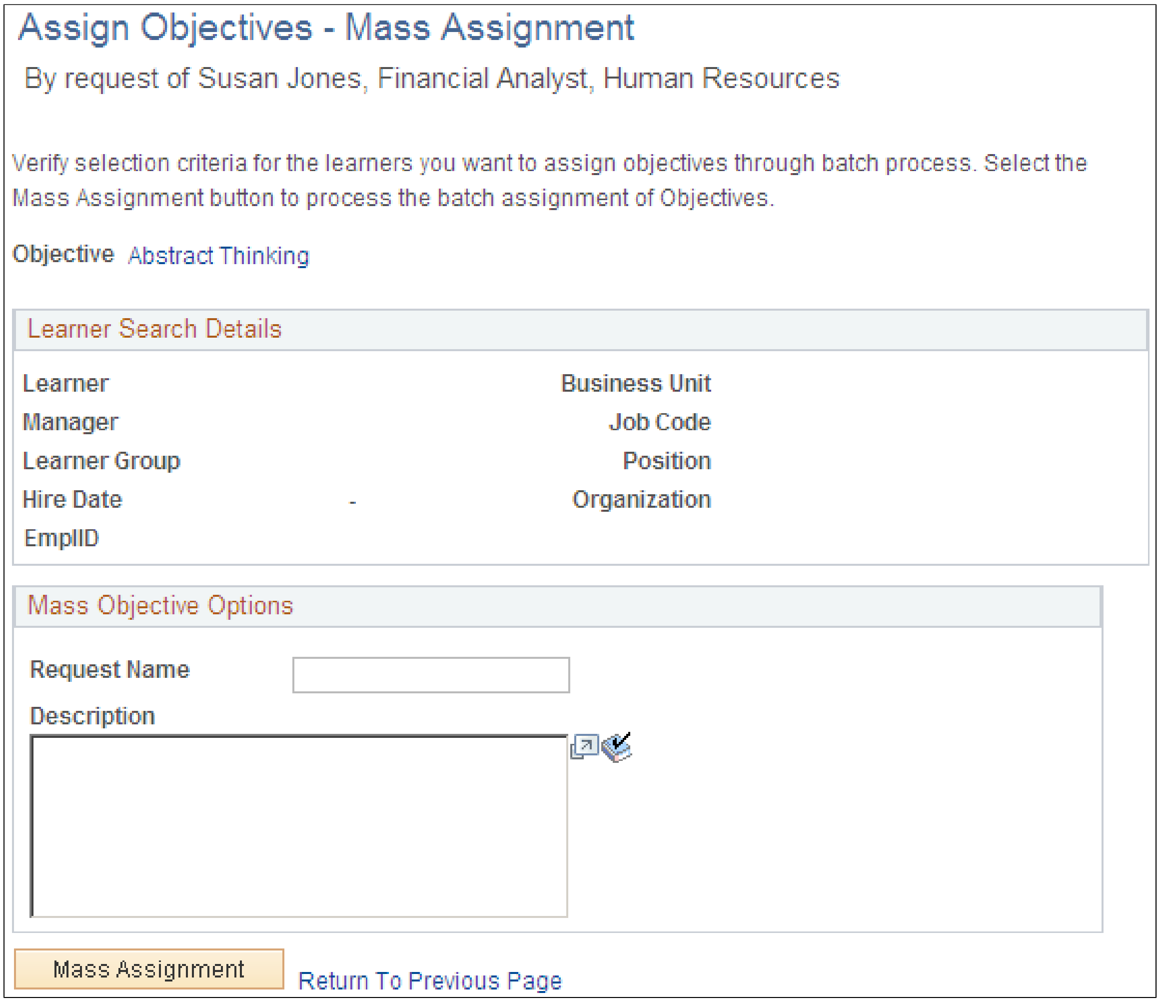
Assign Objectives - Mass Assignment Page

Use the Assign Objectives - Mass Assignment page (LM_MASS_OBJV_LRNR) to enter information for and submit mass objective assignment requests.

Navigation:

Click the Schedule Mass Assignment button on the Group Assignment - Warning page.

This example illustrates the fields and controls on the Assign Objectives - Mass Assignment page.



Mass Objective Options

Field or Control	*Description*
Request Name and Description	Enter the request name and a description for the request. These fields are reserved for future use.
Mass Assignment	Click to submit the mass objective assignment request.

Assignment of Objectives

This group box confirms that the request is successful and appears only after you click the Mass Assignment button.

Process Mass Assignments Page

Use the Process Mass Assignments page (LM_MASS_OBJV_RNCTL) to process mass objective assignment requests.

Navigation:

Enterprise Learning > **Learning Objectives** > **Process Mass Assignments** > **Process Mass Assignments**

Click **Run** to run this request. Process Scheduler runs the Run Mass Assignment process at user-defined intervals.

Note: Run the Run Mass Assignment process during off-peak business hours.

See the product documentation for *PeopleTools: Process Scheduler*.

Chapter 11

Defining Setup for Learning Components

Understanding Learning Components

Learning components are the building blocks of classes. Each class must include at least one learning component. Enterprise Learning Management supports six *basic* types of learning components: web-based, session, webcast, test, survey, and assignment.

When adding a learning component to a class, the administrator first selects the component type. The selected type determines what information must be defined for the learning component and how the system will track learner progress for that component.

You can create your own learning component types, associating each with one of the six basic component types that are delivered with Enterprise Learning Management.

For example, say your organization typically uses two different types of surveys at the end of classes: one to evaluate instructors, and another to evaluate course materials. In this case, you could create a learning component type called Instructor Evaluation and a second learning component type called Materials Evaluation and associate each with the basic learning component type of *survey.* When adding a learning component to the class, administrators will then be able to choose the Instructor Evaluation component or the Materials Evaluation component. (They will also see the delivered survey learning component type unless you delete it.) This feature enables you to define a wide range of learning opportunities customized to correspond to the business practices already in place within your organization.

The following table describes the six basic learning component types and indicates whether each component type supports content that complies with industry standards. Web-based, test, and survey basic learning component types can be Sharable Content Object Reference Model (SCORM) 1.1, 1.2, and 2004, Edition 4, and Aircraft Industry Computer Based Training Committee (AICC) compliant. That is, these basic component types have been designed to comply with vendors who develop content that has been designed and packaged to meet specifications so that progress data can be passed between Enterprise Learning Management and the vendor:

Basic Learning Component Type	***Description***	***Compliance***
Session	Traditional scheduled, instructor-led, classroom-based training.	Not Applicable
Webcast	Scheduled, instructor-led, virtual classroom-based training.	No standards available to date.

Basic Learning Component Type	***Description***	***Compliance***
Web-based	Self-paced, non-virtual classroom online training. The system can track learners' progress and scores for compliant web-based content. Non compliant web-based content can be launched but the learner's progress and scores cannot be tracked.	SCORM, AICC, Non-Compliant
Test	Self-paced, web-based tests. Enterprise Learning Management integrates with third-party standards compliant test engines.	SCORM, AICC, Non-Compliant
Survey	Self-paced, web-based surveys. Enterprise Learning Management integrates with third-party standards compliant survey engines.	SCORM, AICC, Non-Compliant
Assignment	Self-paced, ad hoc learning tasks, such as "Complete Reading," "Do Workbook Exercises," and "Meet with Manager."	Not Applicable

Related Links

SCORM and AICC Compliance

Setting Up Learning Component Types

To set up learning component types, use the Learning Component Type (LM_LC_TYPE) component.

Page Used to Set Up Learning Component Types

Page Name	***Definition Name***	***Usage***
Learning Component Types Page	LM_LC_TYPE	Define learning component types and associate them with delivered basic learning component types.

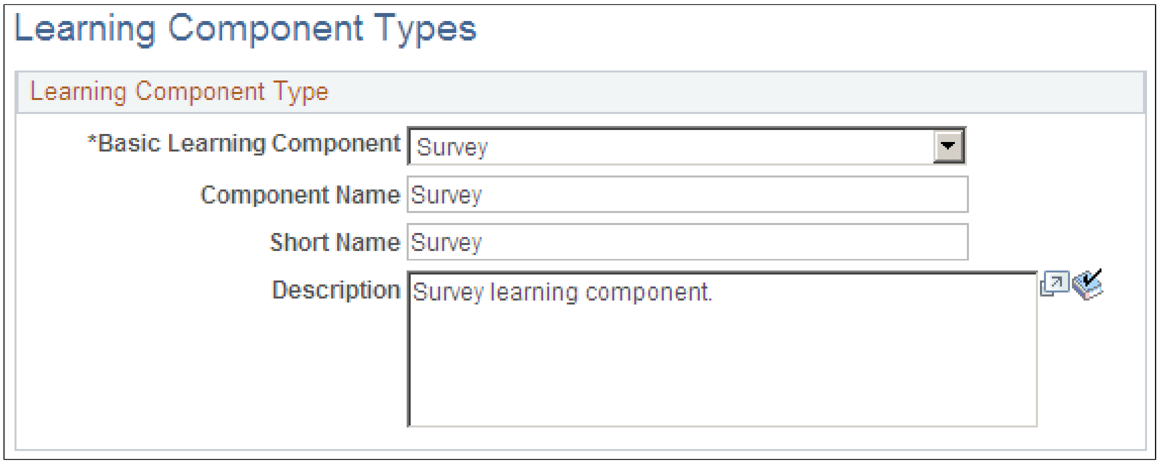
Learning Component Types Page

Use the Learning Component Types page (LM_LC_TYPE) to define learning component types and associate them with delivered basic learning component types.

Navigation:

Set Up ELM > **Catalog** > **Learning Component Types**

This example illustrates the fields and controls on the Learning Component Types page.



Field or Control	Description
Basic Learning Component	Select the basic learning component type with which to associate the learning component type that you are creating.
Component Name	Enter a name for the learning component type that you are creating. The name that you enter here appears to administrators on the Class - Learning Component page when they create the learning component for a class. It is also the name that appears to instructors and learners. The basic learning component type does not appear to learners or instructors.
Delete Learning Component Type	This button appears after you create and save a new component type.

Defining Compliant Class Content Import Settings

To define settings for importing class content, use the Content (LM_LEL_SETUP) component.

This topic discusses how to define the available configuration options that determine how your system works with SCORM- and AICC-compliant content. You must configure these options during initial installation of Enterprise Learning Management, before you can upload and use any SCORM- or AICC-compliant content.

Note: This topic does not apply to noncompliant learning components.

Page Used to Define Class Content Import Settings

Page Name	***Definition Name***	***Usage***
Content Page	LM_LEL_SETUP	Define system-wide class content import settings for your organization.

Related Links

Understanding Web-Based, Test, and Survey Learning Components

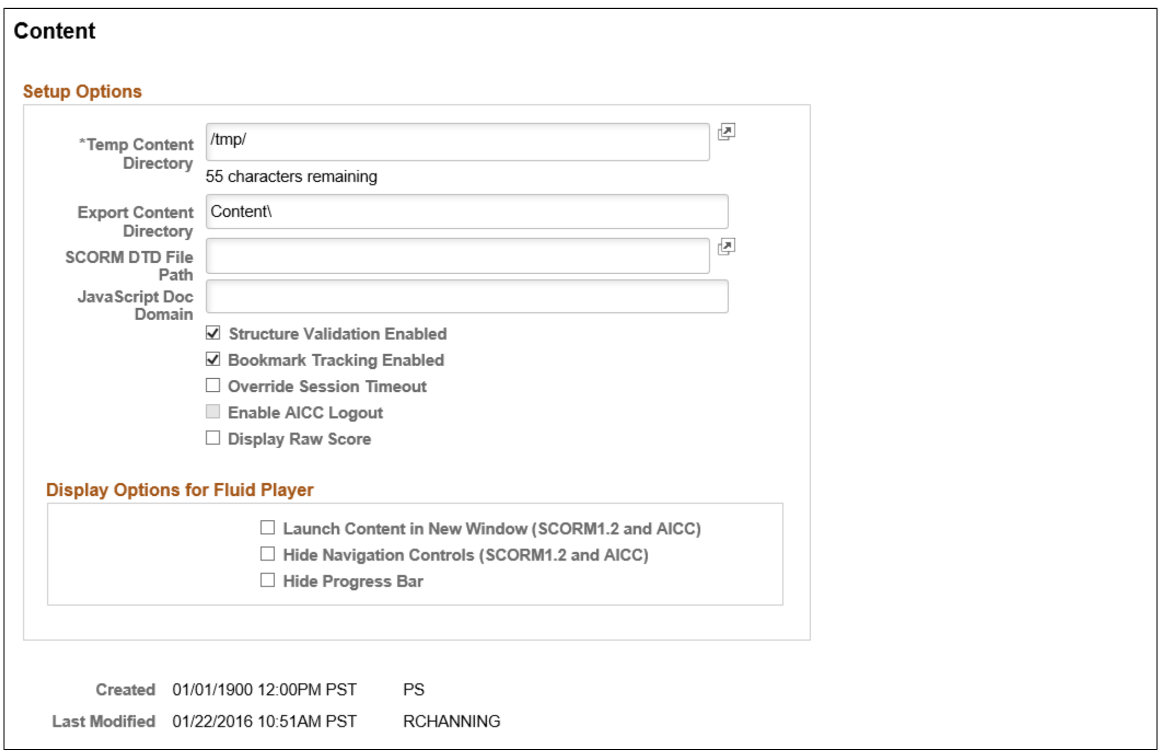
Content Page

Use the Content page (LM_LEL_SETUP) to define system-wide class content import settings for your organization.

Navigation:

Set Up ELM > **Catalog** > **Content**

This example illustrates the fields and controls on the Content page.



Field or Control	***Description***
Setup Options	

Field or Control	*Description*
Temp Content Directory (temporary content directory)	Specify the path to the temporary directory on the application server where content structure files are placed when a learning administrator uploads them. This value must be an absolute directory path (for example, C:\appserver\content).
Export Content Directory	Specify the path to the intermediate directory (relative to the root directory) on the File Transfer Protocol (FTP) server where content structure files are placed when a learning administrator exports them. If this value is not set, the system places files at the root of the FTP server, which you define at installation time.
SCORM DTD File Path (sharable content object reference model document type definition file path)	Specify the name and location of the SCORM document type definition (DTD) file to use for SCORM content structure validation when the Structure Validation Enabled check box is selected. It is not applicable for AICC content.
JavaScript Doc Domain JavaScript document domain	Specify the internet domain to use as the context for JavaScript calls made during content launch and execution. This option is only applicable for SCORM-compliant content.
Structure Validation Enabled	Determines whether the system validates content structure during upload against the DTD file located in the path specified in the SCORM DTD File Path field. This check box should typically be selected. If you deselect it, the system imports the content without any validation. Do not deselect the check box without first checking with a PeopleSoft support or consulting group.
Bookmark Tracking Enabled	Determines whether the system tracks progress status bookmarks in the database during content launch and execution. If this check box is not selected, the system does not track bookmarks. This means that when users resume any online class, they will return to the beginning of the class, instead of to the last stage that they reached previously. This option is useful if the system becomes overloaded with bookmark tracking. In that case, you can disable the tracking.
Override Session Timeout	Determines whether the system overrides session timeout while the user has launched the Table of Contents page for the online class. If you select this check box, and if the user has launched an online class and does not interact with the portal for a long time, the system will not time out and close the session. The session remains active indefinitely. This option applies only while the user is on (has launched) the Table of Contents page. If the user exits the online class and navigates to any other page within the portal, the default session timeout process becomes active.

Field or Control	*Description*
Enable AICC Logout	When a learner is viewing content that is AICC-compliant and logs out of the host system, the provider site sends a message indicating the learner has logged off. Select this check box to have the system automatically log the user off of the Enterprise Learning portal as well.
Display Raw Score	Select to display the raw score instead of the calculated score when viewing class information for learners.
Display Options for Fluid Player	
Launch Content in New Window (SCROM1.2 and AICC)	Select this check box to launch SCORM 1.2 or AICC content in a new window. This is not applicable to SCORM 2004.
Hide Navigation Controls (SCROM1.2 and AICC)	Select this check box to hide the Previous, Next, and Save buttons that appear for SCROM 1.2 and AICC content accessed through the PeopleSoft Fluid User Interface.
Hide Progress Bar	Select this check box to hide the progress bar when new content window is launched.

Understanding Scoring for Compliant Content

For SCORM- and AICC-compliant content imported with the **Display Raw Score** check box deselected, PeopleSoft Enterprise Learning Management displays a calculated passing or failing score of *100* or *0*, respectively. For example, if a learner scored *75* on a test for a SCORM-compliant class, which is sufficient to pass, the system would display a score of *100* to indicate that the learner passed. For classes that include multiple scored components, the system displays an average of all the calculated scores. For example, a learner scores *85* on one class component, which is a passing score. On another class component, the learner scores a *65*, which is a failing score. The system calculates those scores as *100 (passing)* and *0 (failing)*, so it would display a combined calculated average score of *50* for the class.

For compliant content imported with the **Display Raw Score** check box selected, the system displays the actual raw score rather than calculating a passing or failing score. For example, if a learner scored *75* on a test for a SCORM-compliant class, the system would display the raw score of *75.* For classes that include multiple scored components, the system displays an average of the raw scores. For example, a learner scores *85* on one class component, and *65* on a second component. For the learner's score for the entire class, the system would display the average of those two raw scores, which is *75*.

By default, for SCORM 2004-compliant content with multiple scored components, the system calculates the overall score for the class using the scores from each scored component. If roll up rules are defined for the class, however, so that only some of the scored components are to be used to calculate the overall score, PeopleSoft Enterprise Learning Management calculates and displays the class score for learners according to those rules.

Note: Roll up rules are defined by the course developer in the manifest file for SCORM 2004-compliant content and cannot be defined or edited using the PeopleSoft Enterprise Learning Management application.

Chapter 12

Managing Learning Resources

Understanding Learning Resource Management

Most learning organizations need to manage the resources required to offer learning. Resource management addresses these business needs by enabling you to define and maintain your resources, such as materials, equipment, and facilities. It also enables you to apply costs for the use of the resources that you define.

To manage resources, first set up resource types for classification and searching purposes, and define special accommodations and holiday schedules. Next, define the specific resources that are available for use when creating and scheduling classes.

Define Resource Types

To define resource types use the following components: Accommodations (LM_ACMDTN_TBL), Equipment Types (LM_EQP_TYPE), Facility Contact Types (LM_CNTCT_ROLE), Instructor Types (LM_INSTR_ROLE), Material Types (LM_MTRL_TYPE), Room Types (LM_ROOM_TYPE), and Holiday Schedules (LM_HLDAY_SCHED).

Pages Used to Define Resource Types, Accommodations, and Holiday Schedules

Page Name	***Definition Name***	***Usage***
Accommodations Page	LM_ACMDTN_TBL	Define special accommodations, such as wheelchair access, that you can associate with a room within a facility. The accommodation definition comprises a long and short description.
Equipment Types Page	LM_EQP_TYPE	Define equipment types, such as projectors or sound systems. When you define an individual item of equipment, you include its type in the definition. The equipment type definition comprises a long and short description. When you attach equipment to a session, session template, facility, or room within a facility, you can restrict equipment searches to a certain type. On session templates and session patterns, you can specify a type of equipment rather than a specific item.

Page Name	***Definition Name***	***Usage***
Facility Contact Types Page	LM_CNTCT_ROLE	Define types to associate with facility contacts, such as scheduling, catering, and janitorial. The type definition comprises a long and short description.
Instructor Types Page	LM_INSTR_ROLE	Define types to associate with instructors, such as primary instructor, assistant instructor, teaching assistant, or coach. The type definition comprises a long and short description. You use instructor types when you associate an instructor with a session. You also specify instructor types on session templates and session patterns.
Material Types Page	LM_MTRL_TYPE	Define material types, such as student training manual, frequently asked question document, and completion certificates. When you define an individual item of material, you include its type in the definition. The material type definition comprises a long and short description. You attach materials to a class.
Room Types Page	LM_ROOM_TYPE	Define room types, such as classroom, auditorium, or laboratory. When you define a room, you include its type in the definition. The room type definition comprises a long and short description. When you attach rooms to a facility, you can restrict searches to a certain type.
Holiday Schedules Page	LM_HLDAY_SCHED	Group a set of blackout dates (dates for which class sessions cannot be scheduled) together to be attached to a facility. You enter the date, identify the holiday, and add a short description. You use holiday schedules to restrict scheduling of sessions within a facility to open (non-holiday) dates only.

Defining Learning Resources

To define equipment, use the Equipment (LM_EQP_TBL) component. You can use the LM_EQP_TBL component interface to load data into the table for this component. To define materials, use the Material (LM_MTRL_TBL) component. You can use the LM_MTRL_TBL component interface to load data into the table for this component. To define facilities and room, use the Facilities (LM_FCLTY_TBL) component.

After you set up resource types for equipment, materials, instructors, and rooms, you define the specific resources that are available for the classes that you schedule. You also define your facilities and the rooms within those facilities.

Pages Used to Define Learning Resources

Page Name	*Definition Name*	*Usage*
Equipment Page	LM_EQP_TBL	Define equipment by equipment types that you have created. You can supplement the definition with attachments such as manufacturers' user manuals. You can then assign the equipment to session templates, session patterns, facilities, and rooms within facilities.
Equipment Copy Page	LM_EQP_COPY	Copy equipment by creating multiple new records of an equipment item that you have defined. You have some control over what attributes are copied.
Material Page	LM_MTRL_TBL	Define materials by material types that you have created. You can then assign these materials to classes.
Facility Page	LM_FCLTY_TBL	Define a facility by associating a holiday schedule with it and setting up contact details.
Equipment and Attachments Page	LM_FCLTY_EQP	Assign facility-wide equipment—that is, equipment not confined to a particular room in the facility—by associating items of equipment with the facility. Also add related attachments.
Rooms Page	LM_FCLTY_ROOM	Define rooms for a facility.
Room Detail Page	LM_ROOM_TBL	Create, view, enter and edit details of the rooms that you want to define for a facility.
Training Region Page	LM_TRNG_REGION	Define training regions.

Related Links

Defining Instructors

Understanding Equipment Management

Equipment constitutes all of the individual pieces of equipment available in the system. After you define equipment types, define the individual pieces of equipment that are available as resources and attach them to facilities or rooms.

This list explains the relationship between equipment and facilities and rooms:

- When equipment is attached to a facility, it indicates equipment that is available for scheduling by sessions—that is, by session pattern or directly into sessions.

  Once associated with a facility, equipment is added to a library of available equipment.

- You cannot add equipment to a session pattern or session until you have associated it with a facility.

  You can, however, add to a room any item of equipment not currently assigned to a facility or room.

- When equipment is attached to a room, it simply indicates that the item is permanently assigned or affixed to the room and is not available to be scheduled by anyone else, anywhere else.

- When you define a room within a facility, you can set a cost for the use of the room.

  You should calculate the cost, if any, of any equipment that the room has in its definition and build those costs into the room cost, because room-level equipment costs are not automatically mapped to the class.

  An alternative to building room-level equipment costs into a room cost is to apply the equipment cost manually on the Class Costs page.

  See Understanding Class Costing.

  It is also important to know what equipment comes with a room so that you don't unnecessarily reserve facility-level equipment when the room already has it. The additional item may incur additional costs, whereas the cost of the room's equipment may already be built into the room cost.

  The associated cost of any facility-level equipment booked for a session is automatically mapped to the class.

  The system enables you to view the equipment that comes with the room that you have selected when scheduling a class in a facility.

Understanding Attachments

Several of the resources management pages have fields for attachments. What you attach to a page likely depends on the page where you make the attachments. Here are some examples:

- Facility: driving directions to the facility, bus routes and timetables, site map.
- Equipment: electronic copy of user manual.
- Rooms: fixed feature user instructions (complex lighting, screens, curtains, mechanical platforms).

To add an attachment, click the **Add Attachment** button. Then either enter the path to and the name of the attachment, or click the **Browse** button to locate the attachment, and click the **Upload** button. After you upload the attachment, the system displays the attachment file name in the description field. You can edit this description.

To display room attachments to learners, select the **Display** check box next to the attachment description.

To delete an attachment, select the check box next to the attachment description and click the **Delete Attachment** button.

Note: Your system configuration determines the size of the files that you can attach.

Common Elements Used in This Topic

Field or Control	*Description*
Send Email	Click to access a page for sending an ad hoc email. You might use this feature to notify someone of equipment that needs repair or materials that should be reordered.

Equipment Page

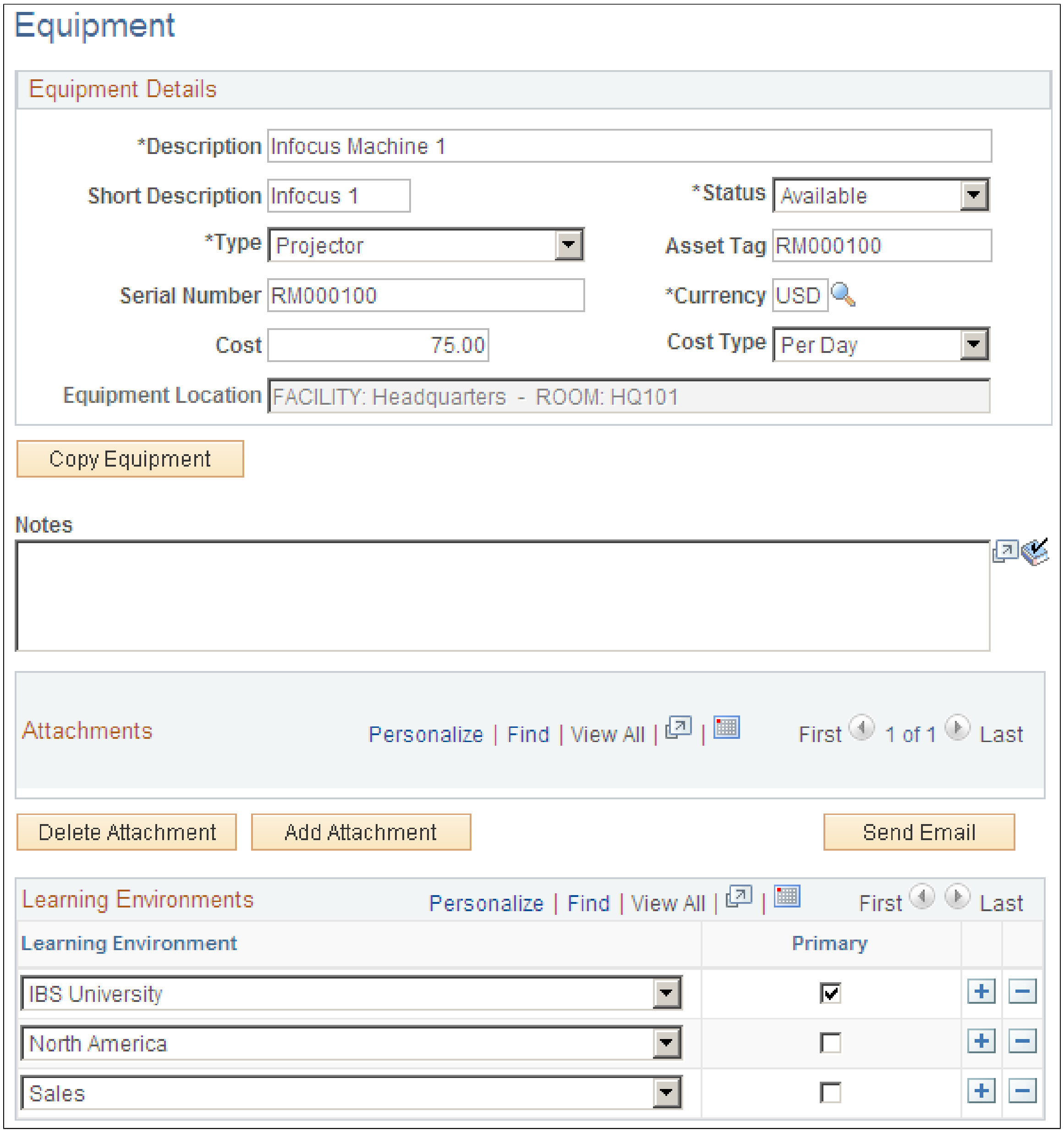
Use the Equipment page (LM_EQP_TBL) to define equipment by equipment types that you have created.

You can supplement the definition with attachments such as manufacturers' user manuals. You can then assign the equipment to session templates, session patterns, facilities, and rooms within facilities.

Navigation:

Enterprise Learning > **Learning Resources** > **Equipment** > **Equipment**

This example illustrates the fields and controls on the Equipment page.



Equipment Details

Field or Control	***Description***
Type	Select a type from the equipment types that you have set up.
Asset Tag	Enter the asset tag. This field is for information only. The system does not use the asset tag that you enter here nor the serial number that you enter in the **Serial Number** field.

Field or Control	*Description*
Cost	Enter the unit cost for the item. The cost of the item for a whole class depends on the cost type. See Understanding Class Costing.
Cost Type	Select the unit by which the cost is charged. Values are: *Day, Fixed, Hour, Student,* and *Week.* See Assigning Class Costs.
Equipment Location	Displays the equipment location. This is a display-only field. When you are first setting up equipment details, the field displays *Currently not assigned to a Facility or Room.* Once the item is assigned to a facility or room, the details appear in this field. You attach equipment to a facility on the Equipment page and to rooms on the Room Details page that you access from the Rooms page.
Copy Equipment	Click to access the Equipment Copy page, where you can quickly add new equipment by copying this record and modifying the results.

Attachments

Use this group box to add attachments to equipment.

See Understanding Attachments.

Learning Environments

Use these fields to specify the learning environments for which this equipment is valid.

Field or Control	*Description*
Learning Environment	For new equipment, the system displays the learning administrator's environment as the default. By adding other learning environments, you enable administrators of those environments access to this equipment. **Important!** If you are creating equipment, be sure that your learning environment is listed here. If it's not, you will lose the ability to access this equipment after you leave this component.

Field or Control	*Description*
Primary	This object must be associated with at least one learning environment. In this field, select the primary environment with which this object is associated. You cannot remove the primary learning environment from this page without first selecting another environment as the primary. You can change the primary learning environment on this page at any time.

Equipment Copy Page

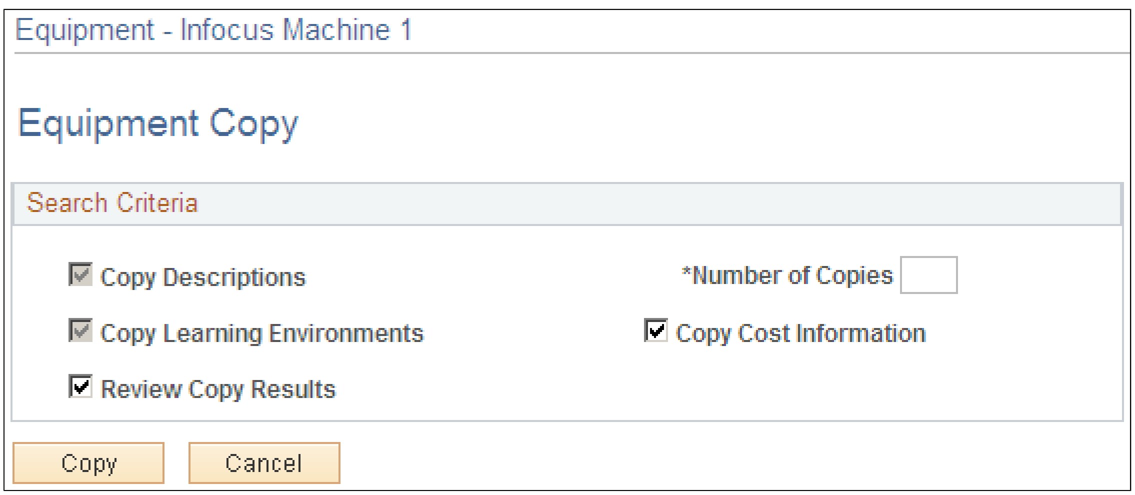
Use the Equipment Copy page (LM_EQP_COPY) to copy equipment by creating multiple new records of an equipment item that you have defined.

You have some control over what attributes are copied.

Navigation:

Click the **Copy Equipment** button on the Equipment page.

This example illustrates the fields and controls on the Equipment Copy page.



If you have a number of items of a particular type, you can set up one item and then copy that item, specifying the number of copies. When the system has generated the copies, you can edit the attributes, such as serial number.

Select the equipment attributes that you want copied and specify the number of copies that you want. Descriptions and learning environments are always copied, so these options are preselected and cannot be cleared.

When you click the **Copy** button, the system produces new records, each with a new ID. To view the copies immediately—so that you can apply unique attributes such as serial number and asset tag—select the **Review Copy Results** check box. The system presents you with a grid containing all the copies it has made. In the grid, you can modify the attributes to make each item unique.

Material Page

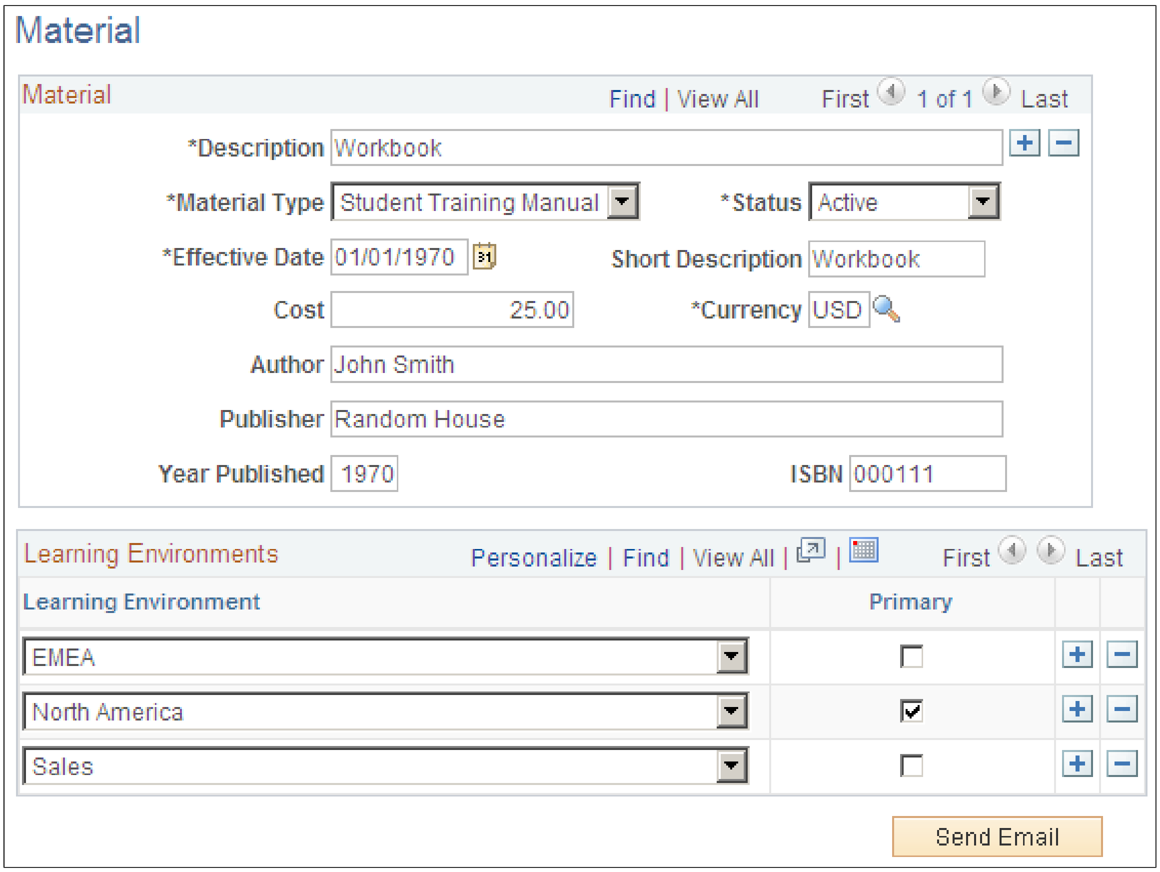
Use the Material page (LM_MTRL_TBL) to define materials by material types that you have created.

You can then assign these materials to classes.

Navigation:

Enterprise Learning > **Learning Resources** > **Material** > **Material**

This example illustrates the fields and controls on the Material page.



Material

Field or Control	*Description*
Material Type	Select from the material types that you have set up.

Field or Control	*Description*
Cost	Enter the unit cost of the material item. When the system calculates class costs, it multiplies this amount by the quantity of the item that you specify through the Material tab within the classes Materials/Attachments page. See Maintain Classes - Materials/Attachments Page. See Understanding Class Costing.
ISBN	Enter the ISBN if the material is a publication that has an ISBN.

Learning Environments

Use these fields to specify the learning environments for which this material is valid.

Field or Control	*Description*
Learning Environment	For new material, the system displays the learning administrator's environment as the default. By adding other learning environments, you enable administrators of those environments access to this material. **Important!** If you are creating material, be sure that your learning environment is listed here. If it's not, you will lose the ability to access this material after you leave this component.
Primary	This object must be associated with at least one learning environment. In this field, select the primary environment with which this object is associated. You cannot remove the primary learning environment from this page without first selecting another environment as the primary. You can change the primary learning environment on this page at any time.

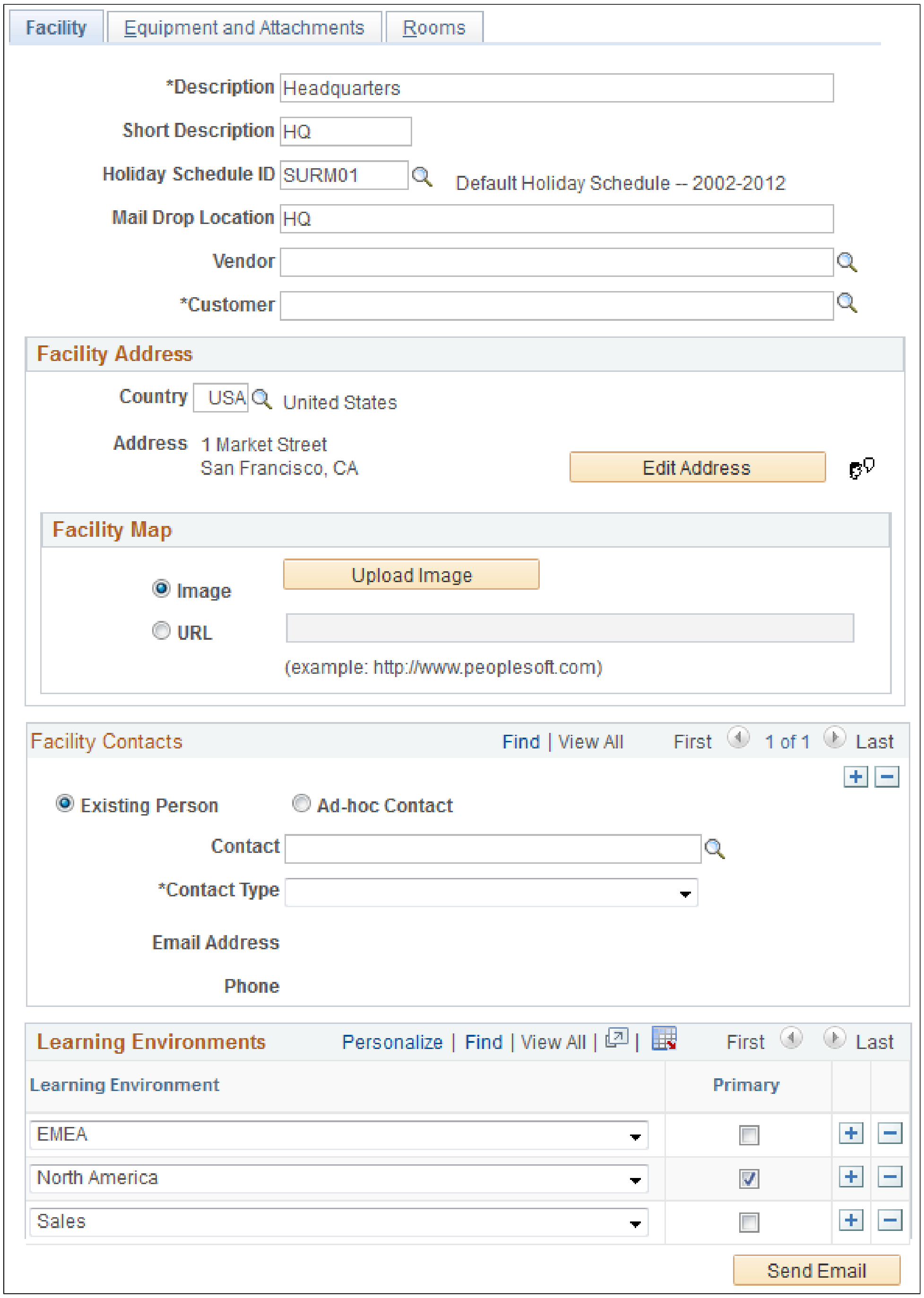
Facility Page

Use the Facility page (LM_FCLTY_TBL) to define a facility by associating a holiday schedule with it and setting up contact details.

Navigation:

Enterprise Learning > **Learning Resources** > **Facilities** > **Facility**

This example illustrates the fields and controls on the Facility page.



When you schedule sessions for a class, you specify the facility in which the class's sessions take place.

Defining a facility has three parts. You need to define:

- Basic facility-wide data, such as address, facility maps, contacts, and attachments.
- The facility's rooms, specifying their location by building and floor and the equipment that comes with each room.
- The facility's equipment inventory from which items can be allocated for a scheduled class.

Field or Control	*Description*
Holiday Schedule ID	If you have defined holiday schedules, you can identify the schedule applicable to this facility. Then, when this facility is used for a scheduled class, the system can ensure that if a holiday occurs within the time span of the class, and if holidays are to be observed, sessions are not created for those days.
Vendor	If the facility is not one of your own, enter the name of the vendor supplying—that is, selling the use of—the facility. This is for informational purposes only.
Customer	If you are using a customer's facility, identify the customer here. This is for informational purposes only.
Learning Environment	For a new facility, the system displays the learning administrator's environment as the default. By adding other learning environments, you enable administrators of those environments access to this facility. **Important!** If you are creating a facility, be sure that your learning environment is listed here. If it's not, you will lose the ability to access this facility after you leave this component.
Primary	This object must be associated with at least one learning environment. In this field, select the primary environment with which this object is associated. You cannot remove the primary learning environment from this page without first selecting another environment as the primary. You can change the primary learning environment on this page at any time.

Equipment and Attachments Page

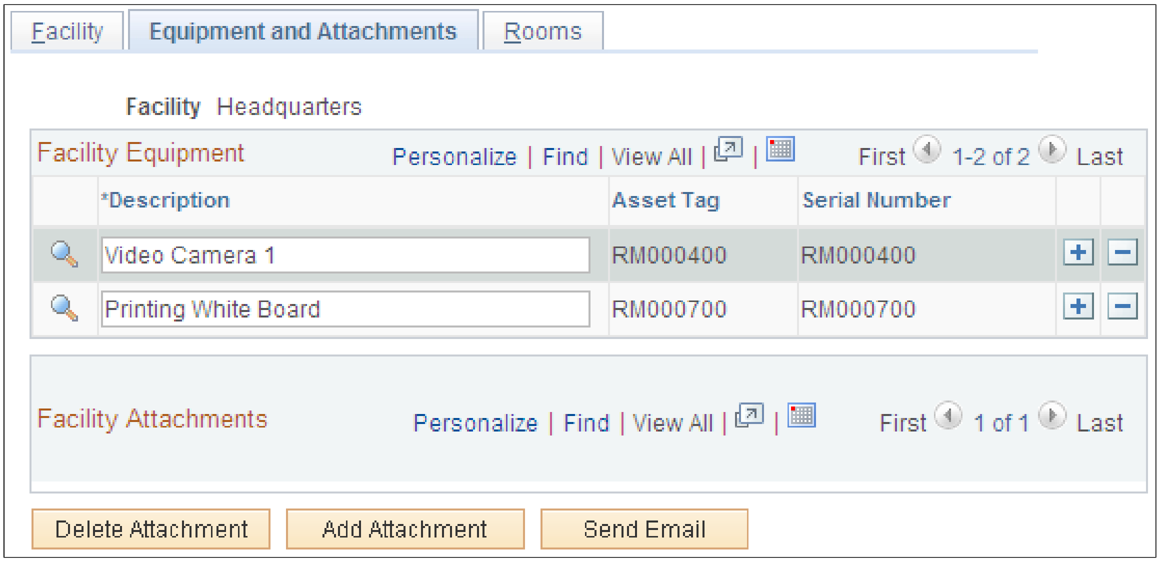
Use the Equipment and Attachments page (LM_FCLTY_EQP) to assign facility-wide equipment—that is, equipment not confined to a particular room in the facility—by associating items of equipment with the facility.

Also add related attachments.

Navigation:

Enterprise Learning > **Learning Resources** > **Facilities** > **Equipment and Attachments**

This example illustrates the fields and controls on the Equipment and Attachments page.



Only equipment that you assign to a facility here is available for attachment to a session pattern, session template, or session.

Related Links

Understanding Attachments

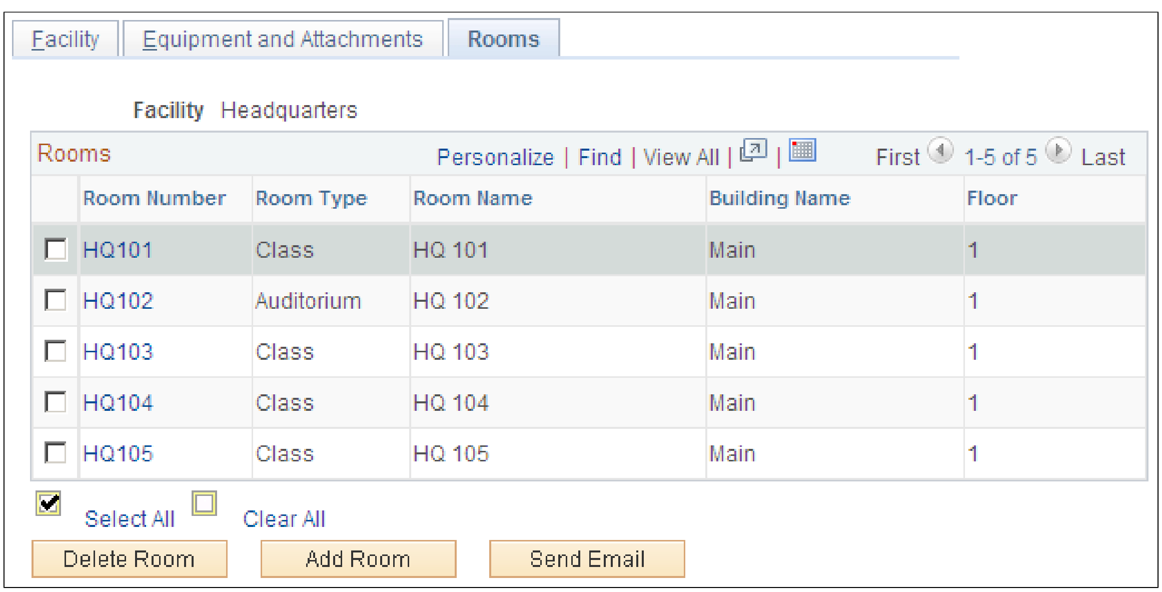
Rooms Page

Use the Rooms page (LM_FCLTY_ROOM) to define rooms for a facility.

Navigation:

Enterprise Learning > **Learning Resources** > **Facilities** > **Rooms**

This example illustrates the fields and controls on the Rooms page.



To edit the details of a room, click the **Room Number** link to access the Room Details page.

To add a room, click the **Add Room** button to access the Room Details page.

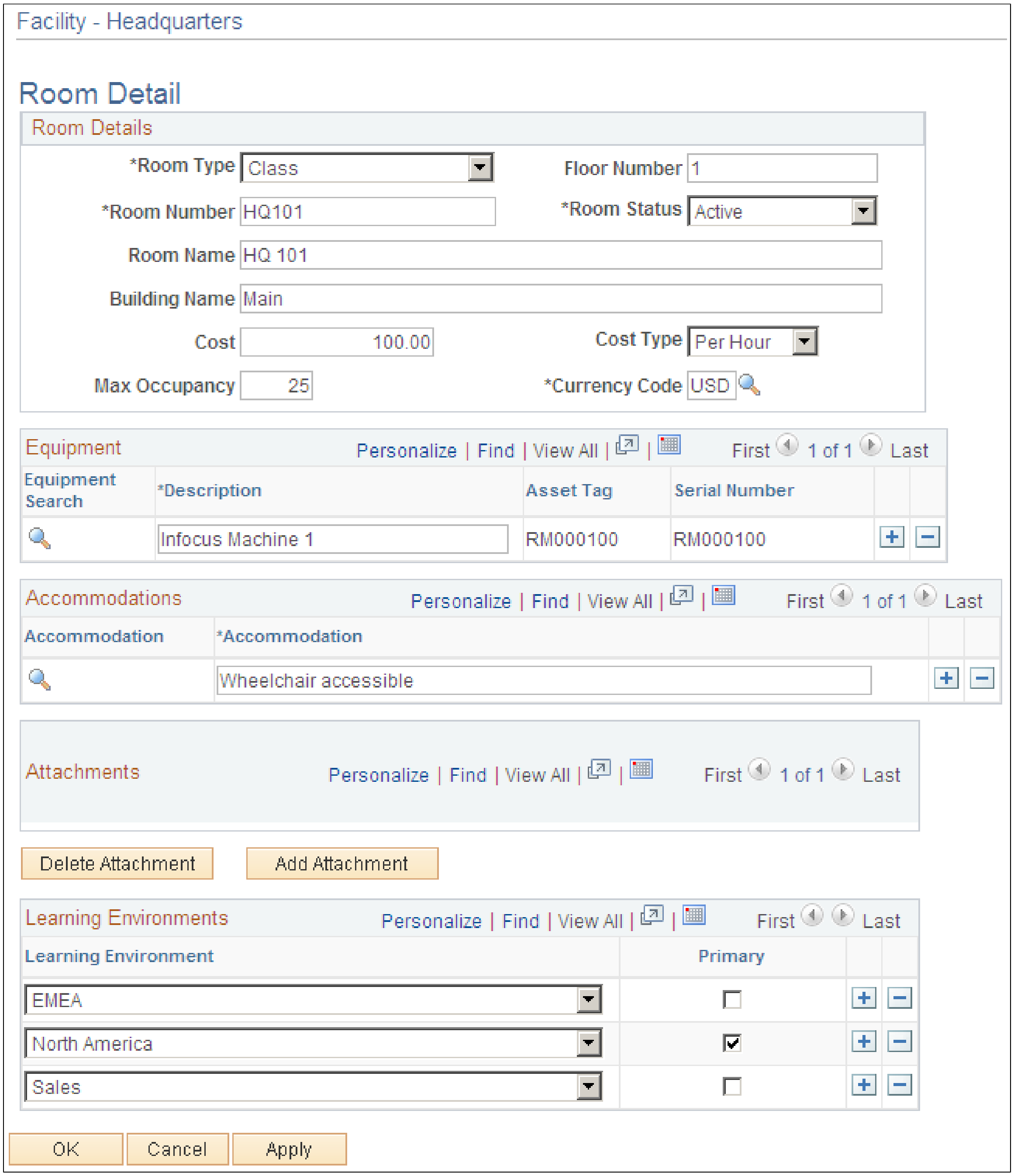
Room Detail Page

Use the Room Detail page (LM_ROOM_TBL) to create, view, enter and edit details of the rooms that you want to define for a facility.

Navigation:

- Click the room number link on the Rooms page for a room already attached to a facility.
- Click the **Add Room** button on the Rooms page when defining or attaching more rooms.

This example illustrates the fields and controls on the Room Detail page.



Enter details of the room, such as type, number, and name, and identify the building the room is in and the floor it is on. Enter the maximum occupancy allowed. Also, enter the cost of using the room per cost type unit. Note that this is the room cost only; if costs are associated with the equipment that comes with the room, you can build that cost into the room cost. Alternatively, you can add the equipment cost manually on the Class Costs page.

See Understanding Class Costing.

Equipment, Accommodations, and Attachments

You can assign equipment, accommodations, and attachments to a room by clicking the search or add buttons to find previously defined equipment, accommodations, and stored attachments. After you attach a room to a session, you can click the **Details** link on the Session Details page to view the rooms details on the Room Detail page (LM_ROOM_ADMIN_DTL), which are the same details that you see in the Room Detail setup page (LM_ROOM_TBL).

See Understanding Attachments.

Learning Environments

Specify the learning environments for which this room is valid. For new rooms, the system displays the learning administrator's environment as the default. By adding other learning environments, you enable administrators of those environments access to this room.

Important! If you are adding new rooms, be sure that your learning environment is listed here. If it's not, you will lose the ability to access this room after you leave this component.

This object must be associated with at least one learning environment. In this field, select the primary environment with which this object is associated. You cannot remove the primary learning environment from this page without first selecting another environment as the primary. You can change the primary learning environment on this page at any time.

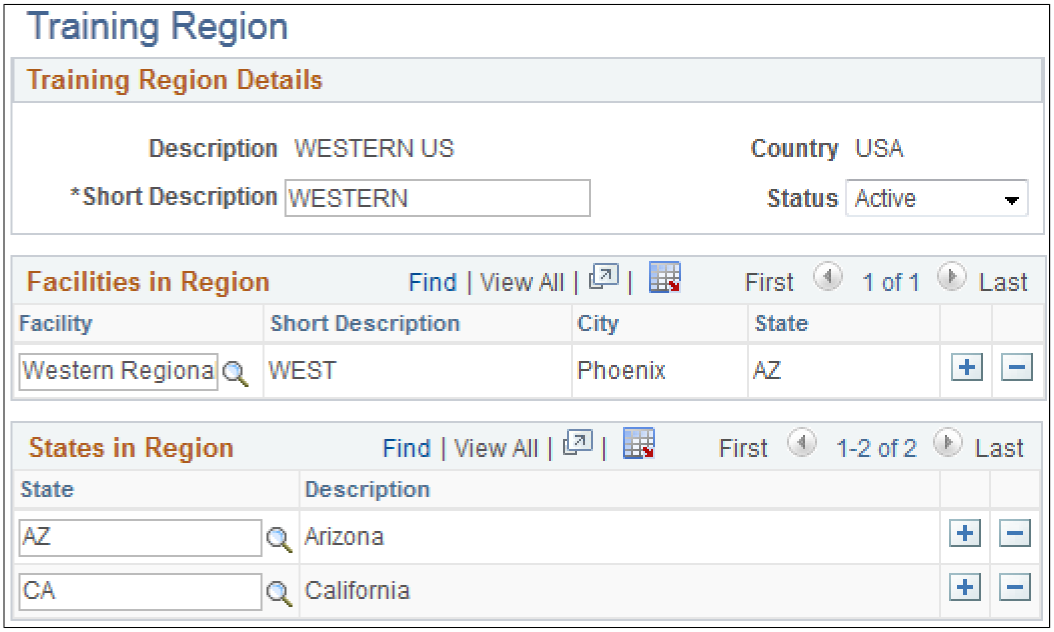
Training Region Page

Use the Training Region page (LM_TRNG_REGION) to define training regions.

Navigation:

Enterprise Learning > **Learning Resources** > **Equipment** > **Training Region**

This example illustrates the fields and controls on the Training Region page. You can find definitions for the fields and controls later on this page.



Learners can specify a preferred training region as part of their learner preferences on the Personal Information Home page. You can also select a training region as an attribute for internal learners on the Internal Learners - Learner Attributes Page.

The system uses training regions to identify classes for the automatic enrollment of planned and waitlisted learning. When a class becomes available and is waitlisted or planned for a learner for which a preferred training region has been defined, the system compares the facility and the facility's state associated with the class to the facilities and states defined for the preferred training region. If the facility associated with the class or the facility's state match a facility or state associated with the preferred training region, the system automatically enrolls the learner into the class.

Note: For automatic enrollment to occur, the language associated with the class must match the preferred language for the learner. The system first checks the value of the **Advanced Search Language** field on the Learner Preferences Page to determine a learner's preferred language. If this field is blank, the system uses the base language for the system as the learner's preferred language.

Field or Control	***Description***
Short Description	Enter a short description for the training region.

Facilities in Region

Select the facilities that you want to include in the training region.

States in Region

Select the states that you want ton include in the training region.

Note: A training region can include one or more facilities, one or more states, or both facilities and states.

Related Links

Personal Information Home Page
Internal Learners - Learner Attributes Page

Scheduling Learning Resources

Pages Used to Schedule Learning Resources

Page Name	***Definition Name***	***Usage***
Facilities Calendar: Monthly Page	LM_MONTHLY_VIEW	View facility scheduling by month.
Facilities Calendar: Weekly Page	LM_WEEKLY_VIEW	View facility scheduling by week.
Facilities Calendar: Daily Page	LM_DAILY_VIEW	View facility scheduling by day.
Facilities Calendar: Reserve a Room Page	LM_RSRV_RM	Reserve rooms

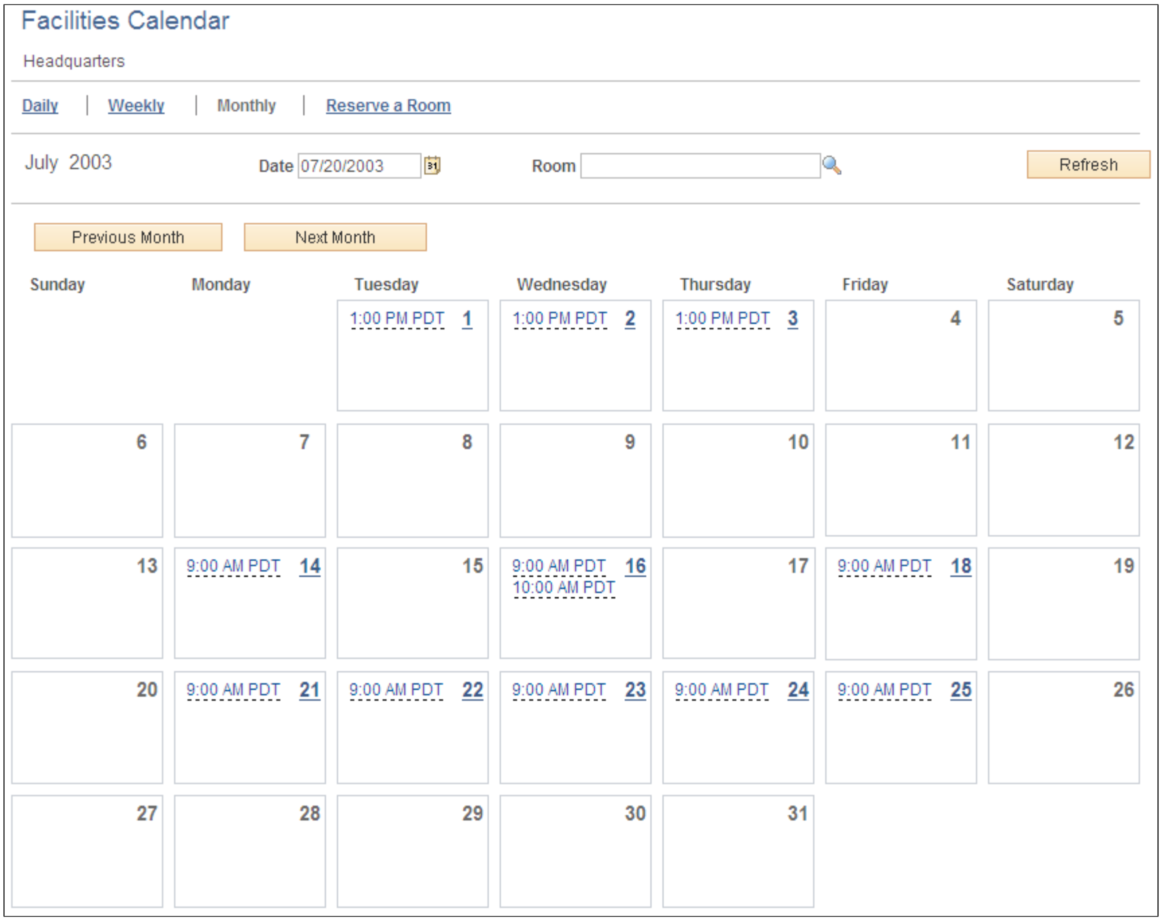
Facilities Calendar: Monthly Page

Use the Facilities Calendar: Monthly page (LM_MONTHLY_VIEW) to view facility scheduling by month.

Navigation:

Enterprise Learning > **Learning Resources** > **Facilities Calendar** > **Facilities Calendar**

This example illustrates the fields and controls on the Facilities Calendar: Monthly page.



Use this page to view facility scheduling for a specific month. Click a date link to access the schedule for that day on the Facilities Calendar: Daily page. Click a time link to access the Maintain Classes - Class Details page, where you can view and update detailed information about the scheduled class.

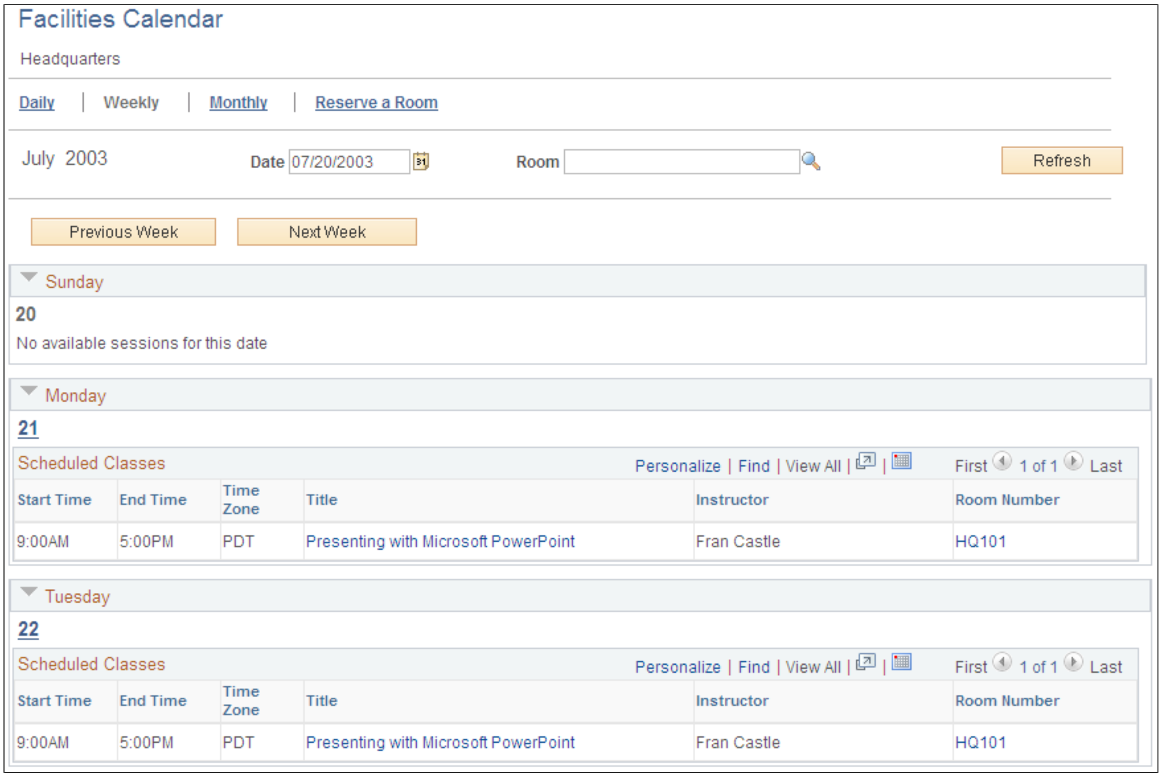
Facilities Calendar: Weekly Page

Use the Facilities Calendar: Weekly page (LM_WEEKLY_VIEW) to view facility scheduling by week.

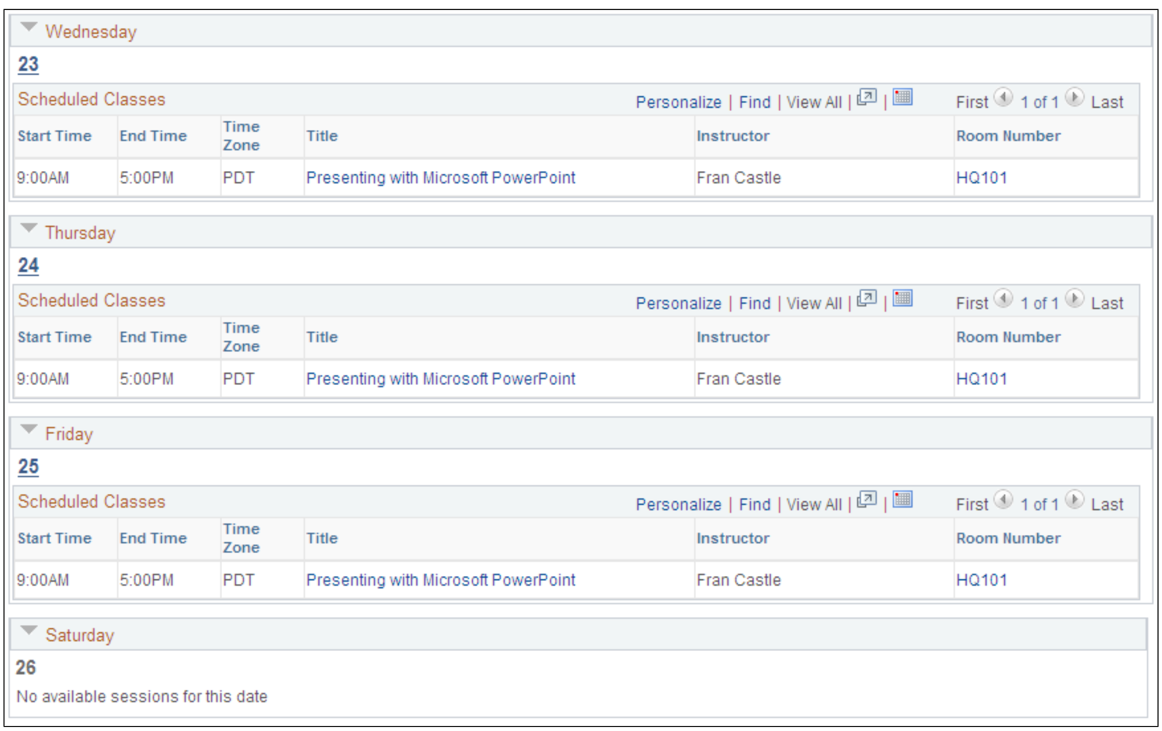
Navigation:

Click the Weekly link on the Facilities Calendar: Monthly page.

This example illustrates the fields and controls on the Facilities Calendar: Weekly page (1 of 2).



This example illustrates the fields and controls on the Facilities Calendar: Weekly page (2 of 2).



Use this page to view facility scheduling for a specific week.

Field or Control	*Description*
Date and Room	Enter the date and room of the scheduled classes you want to view.
Refresh	Click to view the scheduled classes with the date and room you specified.
Title	Click a link in this column to access the Maintain Classes - Class Details page, where you can view and update detailed information about the scheduled class. See Defining Class Details.
Room Number	Click a link in the column to access the Room Detail page, where you can view information about the room in which the session is being taught. See Room Detail Page.

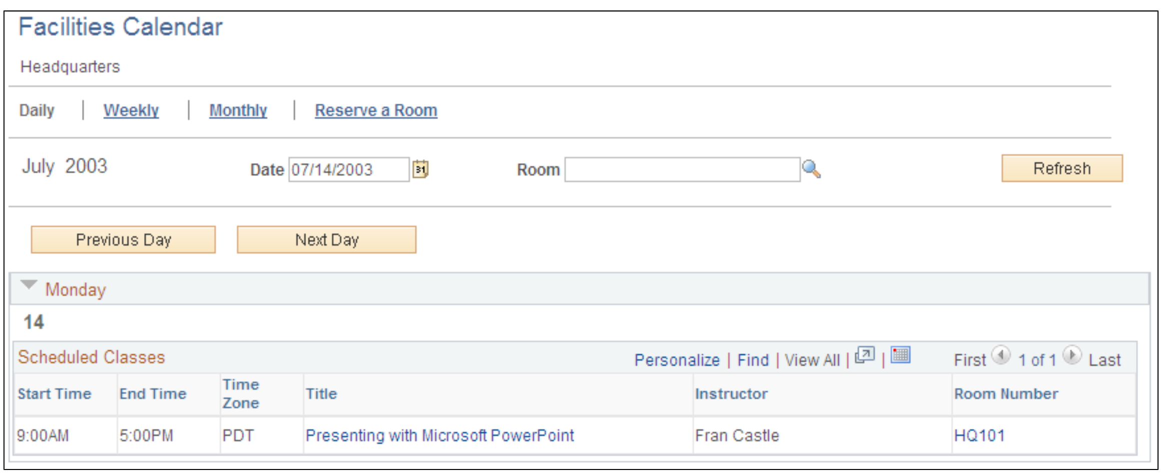
Facilities Calendar: Daily Page

Use the Facilities Calendar: Daily page (LM_DAILY_VIEW) to view facility scheduling by day.

Navigation:

Click the Daily link on the Facilities Calendar: Weekly page.

This example illustrates the fields and controls on the Facilities Calendar: Daily page.



Use this page to view facility scheduling for a specific day.

The fields on this page are identical to those on the Facilities Calendar: Weekly Page.

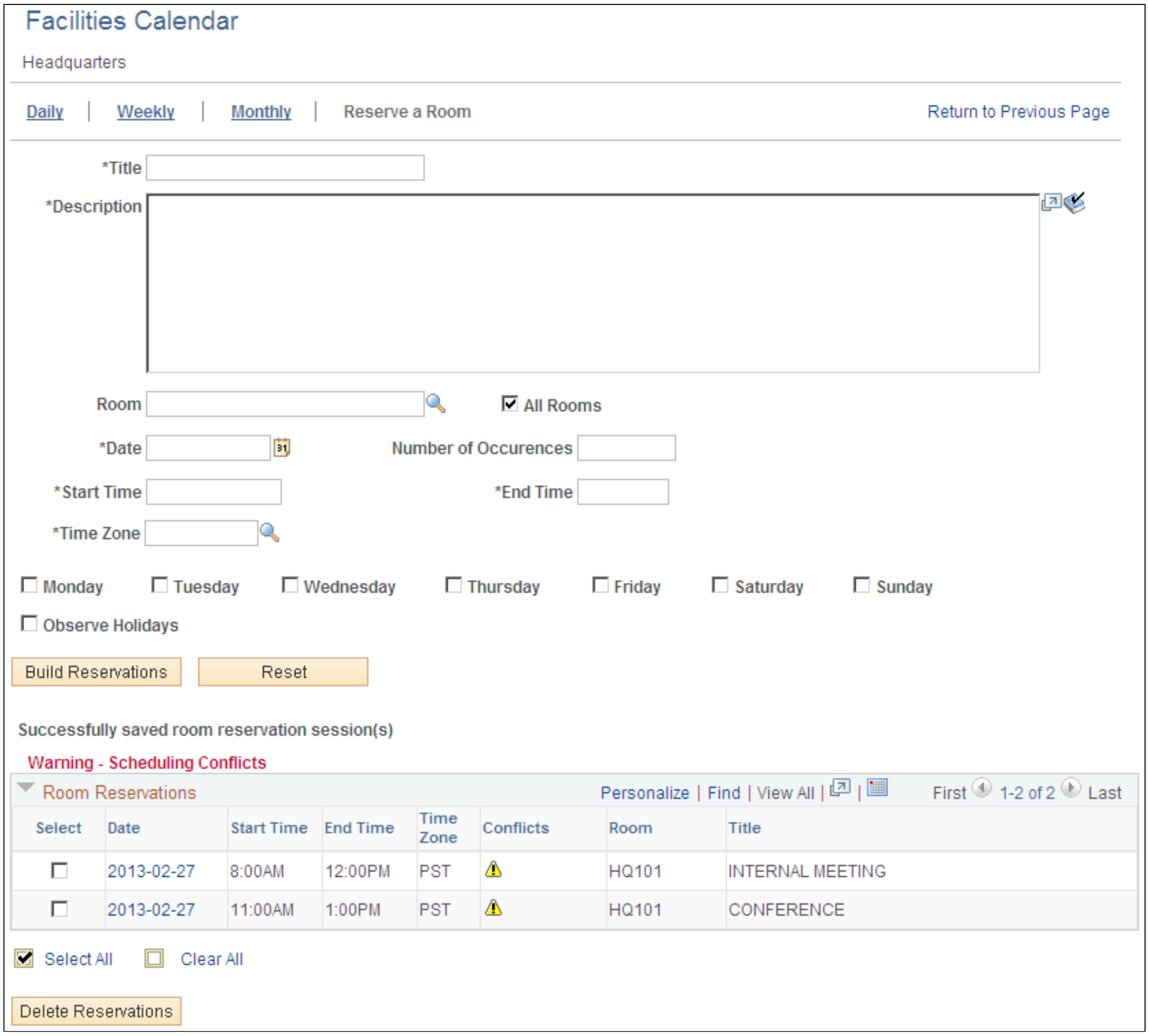
Facilities Calendar: Reserve a Room Page

Use the Facilities Calendar: Reserve a Room page (LM_RSRV_RM) to reserve rooms.

Navigation:

Click the Reserve a Room link on the Facilities Calendar: Weekly page.

This example illustrates the fields and controls on the Facilities Calendar: Reserve a Room page.



Field or Control	***Description***
Title and Description	Enter a title and description of the event for which you are reserving a room.
Room	Select the room that you want to reserve. If you select a specific room in this field, the **All Rooms** check box becomes unavailable.
All Rooms	Select to apply the reservation to all rooms defined for the facility.
Date	Enter the start date for the reservation.

Field or Control	***Description***
Number of Occurrences	Enter the number of days for which you are reserving a room.
Start Time and End Time	Specify the time span for which you want to reserve a room.
Time Zone	Enter the time zone for the start and end times.
Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday	Select the check box next to the days you want to include in the room reservation.
Observe Holidays	Select to exclude observed holidays from the room reservation.
Build Reservations	Click to build reservations according to the parameters you specified.
Reset	Click to reset the fields on this page to their default values.

Room Reservations

This group box displays all the room reservations that you create using the **Build Reservations** button.

Field or Control	***Description***
Date	Click a link in this column to access the Facilities Calendar - Details page where you can review and update the room reservation details.
Select	Select the check box in this column to mark a reservation for deletion.
Delete Reservations	Click to delete the reservations you marked for deletion in the **Select** column.
Conflicts	Click to access the Scheduling Conflicts page where you can view conflicting room reservations.

Chapter 13

Managing Payment Methods

Understanding Payment Method Setup

This topic lists prerequisites and discusses payment method setup.

Prerequisites

Before you can set up payment methods, you must:

- Set up financial ChartField data.

  See Setting Up Financial ChartField Data.

- Set up learning environments.

  See Defining Learning Environments.

- Set up customer organizations.

  See Defining Customers.

- Set up external learner profiles.

  See Reviewing and Defining External Learner Data.

Payment Method Setup

Enterprise Learning Management supports several payment methods for enrollment and registration fees. Available payment methods during enrollment or registration depend on the type of learner who is requesting the training and the learner's organization. Internal learners can use only chargebacks to pay for class and program fees. External learners can use chargebacks, training units, purchase orders, credit cards, cash, and checks, depending on the payment methods that you enable for the customer organization to which the learner belongs.

Follow these steps to set up payment methods:

1. Select payment methods for your organization.

   See Payment Methods Page.

2. Select payment methods for each learning environment.

   See Learning Environment - Defaults Page.

3. Select payment methods and define training unit pools for each customer organization.

   See Payment Information Page.

4. Manage training unit pools for each customer organization.

   See Maintain Training Units Page.

5. Set up and manage purchase orders for each customer organization.

   See Setting Up and Managing Purchase Orders.

6. Assign training unit pools and purchase orders to external learners.

   See Profile Info Page.

Setting Up and Managing Training Unit Pools

To set up training unit pools, use the Customers component (LM_CUSTOMER_MAIN) and the Maintain Training Units component (LM_TU_ITEMS).

Pages Used to Set Up and Manage Training Unit Pools

Page Name	***Definition Name***	***Usage***
Payment Information Page	LM_MOP_ADMIN	Set up training unit pools for a customer organization.
Maintain Training Units Page	LM_TU_ITEMS	View information for purchased training units and add training units to a training unit pool.

Understanding Training Units

Training units are prepaid units that external organizations can purchase at a discounted price. They enable you to presell training that learners can use at a later date. The system depletes training units from the prepaid account each time a learner from the customer organization uses the account to pay for enrollment, registration, or drop fees. This prepaid account is referred to as a training unit pool.

PeopleSoft Enterprise Financials or a third-party financials system handles the actual purchase and accounting of training units for a training unit pool. Enterprise Learning Management tracks and maintains training unit pools after the customer organization purchases them.

Each customer organization can have multiple training unit pools. You can associate each learner from the customer organization with one or more training unit pools. This association allows the learners to use the training unit pools to pay for enrollment, registration, and drop fees.

Customer organizations can purchase training units for a training unit pool as often as necessary to replenish the pool. Each time the customer organization purchases training units, you must add a new row to the training unit pool. The system deducts training units on a first in first out basis. When a learner uses training units, the system deducts the units from the first row in the training unit pool. After the system deducts training units from a row, you cannot edit or delete the row, even when the learner drops the class or program and the balance for the row returns to the full amount. Create new rows to add more units to the training unit pool.

Enterprise Learning Management provides two reports that enable you to track training unit pool usage by customer organization.

Related Links

Financial Reports

Payment Information Page

Use the Payment Information page (LM_MOP_ADMIN) to set up training unit pools for a customer organization.

Navigation:

Enterprise Learning > **Organizations** > **Customers** > **Payment Information**

See Payment Information Page.

Maintain Training Units Page

Use the Maintain Training Units page (LM_TU_ITEMS) to view information for purchased training units and add training units to a training unit pool.

Navigation:

Enterprise Learning > **Financial Details** > **Maintain Training Units** > **Maintain Training Units**

This example illustrates the fields and controls on the Maintain Training Units page.

Field or Control	***Description***
Date of Purchase	Enter the purchase date.
Expiration Date	Enter the expiration date. Learners cannot use training units after the expiration date.
Units	Enter the number of training units purchased.
Total Paid	Enter the total amount paid for the training units.

Field or Control	Description
Currency	Displays the currency used to purchase the training units. Define the training unit pool currency on the Payment Information page. The currency of a training unit pool must match the currency of a class or program fee for a learner to successfully enroll in the class or register for the program.
Balance	Displays the current training unit balance.

Setting Up and Managing Purchase Orders

To set up purchase orders, use the Maintain Purchase Orders component (LM_PURCHASE_ORDERS).

Page Used to Set Up and Manage Purchase Orders

Page Name	Definition Name	Usage
Maintain Purchase Orders Page	LM_PURCHASE_ORDERS	View information for a customer's current purchase orders, and add new purchase orders.

Understanding Purchase Orders

Purchase orders function as a line of credit for a customer organization. Customers do not pay for purchase orders in advance. Instead, purchase orders represent a commitment from a customer organization to pay for training fees. Purchase orders enable learners to enroll in classes and register for programs that carry charges under the agreement that the customer organization will pay for the learner's training when you bill them. You can use the purchase order number during the invoice process to note that the customer organization previously agreed to pay for the training.

PeopleSoft Enterprise Financials or a third-party financials system handles the actual setup of purchase orders for a customer organization. Enterprise Learning Management tracks the usage of each purchase order after you set up the purchase order in the financials system.

Each customer organization can have multiple purchase orders. You can associate each learner from the customer organization with one or more purchase orders. When a learner uses a purchase order to enroll or register in a class or program, the system deducts funds from the purchase order. After the system deducts funds from a purchase order, you cannot edit or delete the deduction, even when the learner drops the class or program and the balance for the purchase order returns to the full amount.

Enterprise Learning Management provides two reports that enable you to track purchase order usage by customer organization. You can use these reports to bill customer organizations.

Related Links

Financial Reports

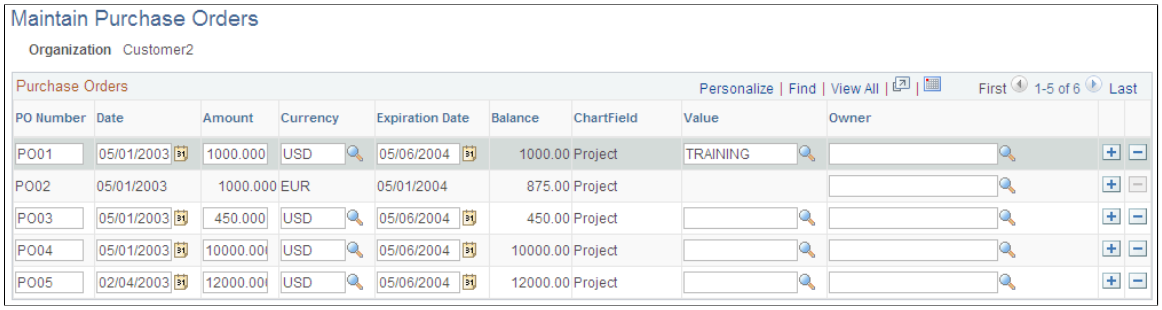
Maintain Purchase Orders Page

Use the Maintain Purchase Orders page (LM_PURCHASE_ORDERS) to view information for a customer's current purchase orders, and add new purchase orders.

Navigation:

Enterprise Learning > **Financial Details** > **Maintain Purchase Orders** > **Maintain Purchase Orders**

This example illustrates the fields and controls on the Maintain Purchase Orders page.



Field or Control	***Description***
PO Number (purchase order number)	Enter the purchase order number. Purchase order numbers must be unique within a customer organization, but multiple customer organizations can use the same purchase order number.
Date	Enter the purchase date.
Amount	Enter the amount of the purchase order.
Currency	Select the currency that is to be used for the purchase order. This currency must match the currency of a class or program fee for a learner to successfully enroll or register in the class or program.
Expiration Date	Enter the expiration date. A learner cannot use the purchase order after the expiration date.
Balance	Displays the current balance for the purchase order.
ChartField	Displays the ChartField that is associated with the purchase order. Define ChartFields for purchase orders on the Payment Methods page.
Value	Select a ChartField value. The ChartField values that you can select are any values with an active status on the Chartfield Values page.

Field or Control	Description
Owner	Select an owner for the purchase order. The owner can be anyone from the customer organization. Owners of purchase orders must approve any enrollment or registration request for a learner who uses the purchase order when the system requires payment approval to enroll in the class or register in the program. Assign approval types for classes on the Classes - Class Details page. Assign approval types for programs on the Maintain Program - Details page. A learner's enrollment or registration in a class or program is not confirmed until the owner gives payment approval. Payment approval is not required if no owner is assigned to the purchase order or if payment approval is not required to enroll in the class or register in the program. Owners of purchase orders can approve enrollment and registration requests by using the approvals page.

Chapter 14

Understanding the Catalog Structure

Learning Catalog

The learning catalog is a repository of information about the courses that are available to internal and external learners, including your organization's employees, contractors, partners, and customers. The catalog supplies detailed information about each class, including a description of its content, learning objectives, prerequisites, and other features. Each class can be categorized and assigned keywords so that learners and managers can quickly locate relevant classes in the catalog.

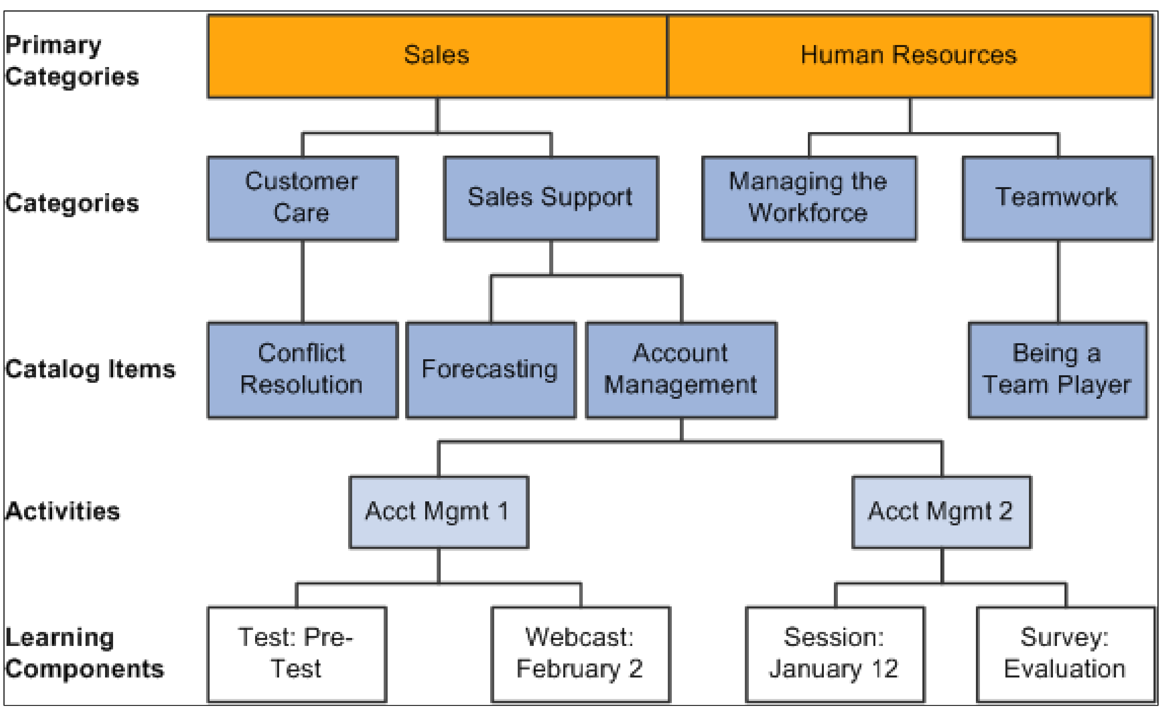
Learners and managers can use the self-service Find Learning component to view the learning catalog, add items to their learning plans, and initiate the enrollment process.

Related Links

Using the Learning Catalog
Understanding Learning Catalog Setup

Catalog Hierarchy

This diagram illustrates the hierarchical structure of the learning catalog.



Categories are the highest level in the hierarchy. They help classify content so that users can easily find classes of interest. You can nest categories as needed. Keep in mind that catalog maintenance can become more complex with each layer of categories that you add.

Each category can include multiple courses. Courses represent the specific topics of study that are available to learners—for example, Account Management.

Note: You can also group courses together to form curricula and certifications.

See Understanding Programs.

A specific instance of a course is a class. Classes represent the learning events in which learners enroll and comprise one or more learning components that define the learning content. The six basic learning component types are session, webcast, web-based, survey, test, and assignment. For example, you might create two different classes for the Account Management course. The first class could be strictly session based, while the second class could be blended, consisting of a pre-test, webcast, web-based article, and a post-test. When searching the catalog, learners can see both offerings and choose the one that best suits their needs.

Catalog Access

You control access to the catalog through the use of learning environments and learner groups.

Learning Environments

A learning environment provides organization and security for categories, courses, and programs. By creating learning environments, you can partition the catalog into broad groups of course offerings so that:

- Administrators can update only those items within their area of responsibility.
- Learners can access only those categories that are relevant to them.

You might set up learning environments based on your organizational structure such as sales, operations, and finance, or identify some other high-level groupings that are meaningful to your organization. You can select different business rules for the classes and programs that are created within each learning environment, define unique security rules by environment, and designate different administrators for each environment. At least one learning environment is required.

You associate learning environments with users, categories, courses, and classes. The environment that is assigned to a learning administrator controls which parts of the catalog the administrator can update and which learner groups the administrator can associate with categories, courses, classes, and programs.

Each learner and manager is assigned to only one learning environment.

Categories, courses, classes, and programs can be associated with multiple learning environments, making it possible for learning to be shared across environments.

Learner Groups

A learner group is a set of users who typically share the same attributes, such as the same department or job code. You associate each learner group with a learning environment, and you assign each learner to at least one learner group to access information in the catalog.

You also associate learner groups with categories, courses, and classes. For a user to access a particular class in the catalog, the user must also belong to a learner group that is assigned to the class, the course, and the category that's associated with the course. With learner groups, you can tailor each user's view of the catalog, down to the class level, if necessary.

Related Links

Understanding Learning Environments

Understanding Learner Groups

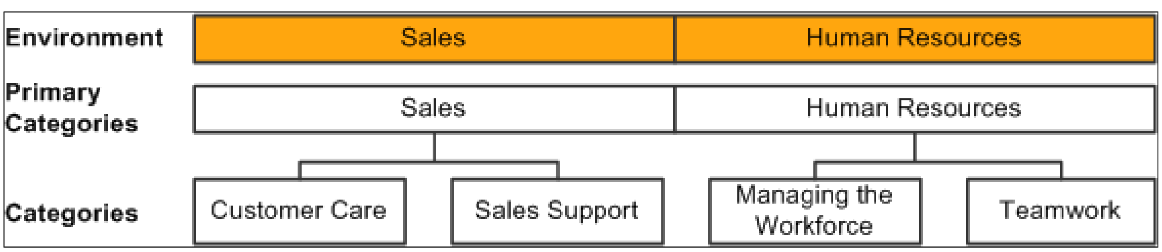
An Example of Learning Environments and Learner Groups

Following is an example that illustrates the basic concepts of learning environments and learner groups.

Suppose you have just completed an analysis of the different learning requirements throughout your organization, and have decided on four learning environments to reflect the structure of your business: sales, finance, production, and human resources.

For the sales environment you identify a broad category of sales, plus two subcategories: customer care and sales support. For the human resources environment you identify a broad category of human resources and two subcategories: managing the workforce and teamwork.

This diagram shows the framework for the catalog.



Employees in the Sales division need access to all classes within the sales environment plus selected teamwork classes in the human resources environment. You do not want sales employees to access any other classes in human resources.

Here is how you might set up your catalog to meet these requirements:

1. Create the learning environments.

   Defining environments consists of naming them and establishing the default values that are passed down to the classes created within the environments. Each time you create a learning environment, the system automatically creates a matching learner group. You assign each learner to one or more learner groups.

2. Associate the sales environment with the sales administrator, the human resources environment with the human resources administrator, and so forth.

   This enables administrators to create the categories and courses for their learning environments.

3. The human resources administrator defines two categories—human resources and teamwork—and associates both with the human resources environment, the administrator's own environment.

   Ignore the Managing the Workforce category for this example.

   The human resources administrator also associates, or *shares,* both categories with the sales environment, giving the sales administrator the ability to update these categories as well.

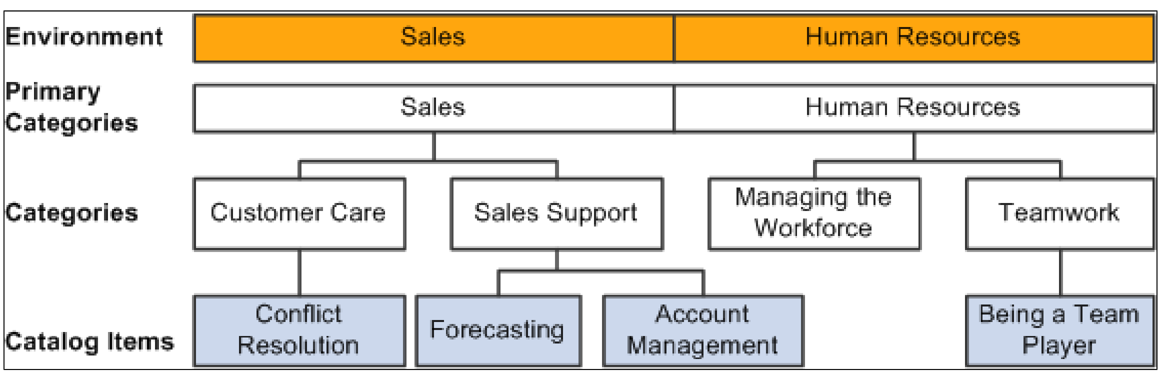
4. Administrators assign learner groups to the categories to specify who can access the categories in the catalog.

   The human resources administrator associates the human resources learner group with the human resources and teamwork categories. The sales administrator associates the sales learner group with both categories.

5. Administrators define the courses within the categories.

   Within the teamwork category, the human resources administrator creates the course, "Being a Team Player," and associates it with the human resources environment and human resources learner group. The human resources administrator also shares this course with the sales learning environment. The sales administrator can then access the course and associate it with the sales learner group.

This diagram illustrates a sample catalog structure.



As the human resources administrator adds classes to the teamwork category, he or she can share them with the sales administrator (by associating them with the sales environment) and thereby enable the sales administrator to make the classes available to the sales learner group.

This table summarizes the setup that is required for users in the sales division to access the "Being a Team Player" course:

	Learning Environments	***Learner Groups***
Users in the Sales division	Sales	Human Resources, Sales
Category (Human Resources)	Sales, Human Resources	Human Resources, Sales

	Learning Environments	***Learner Groups***
Category (Teamwork)	Sales, Human Resources	Human Resources, Sales
Course (Being a Team Player)	Sales, Human Resources	Human Resources, Sales

Primary Learning Environments and Categories

This topic explains the concepts of primary learning environments and primary categories.

Primary Learning Environments

Each administrator can be associated with multiple learning environments through the Learning Environment - Basic Data page. Administrators can use the Set Learning Environment page to select their current learning environment. The selected learning environment controls which objects (categories, course, classes, and programs) the administrator can update.

When an administrator creates an object, the system associates the administrator's current learning environment with it. The administrator's current learning environment becomes the object's primary learning environment. To remove the primary learning environment from the object, an administrator can add another environment and select it as the primary. This prevents administrators from accidentally locking themselves out of objects that they need to update. If the original primary learning environment is removed from the object, the creator of that object can no longer access it.

Primary Categories

Primary categories are the first categories you see in the By Category facet when you access the Find Learning page. You can have many levels of subcategories within the primary category. When users use the By Category facet to filter search results, they start with the primary category and navigate down to each subcategory as needed.

You also want to carefully plan the types of categories that you need, keeping in mind that categories, as well as courses, classes, and programs can be shared across learning environments.

Chapter 15

Creating the Learning Catalog

Understanding Learning Catalog Setup

The learning catalog stores detailed information about all items, classes, and programs that are available to internal and external learners.

This topic lists prerequisites and discusses:

- Catalog creation.
- Class templates.

Prerequisites

Before you create the learning catalog:

- Create learning environments.

  See Defining Learning Environments.

- Define learner groups.

  See Building Learner Groups.

- Read about the learning catalog structure.

  See Catalog Hierarchy.

Catalog Creation

To create the learning catalog:

1. Define categories.

   Categories are logical groupings of items that enable learners and managers to easily search for appropriate classes and programs.

2. (Optional) Define keywords.

   Keywords are additional terms not already represented in the item name or description that learners and administrators might use to search the learning catalog to find courses.

3. Define delivery method types.

   Delivery methods define how course offerings are presented to learners, for example, through instructor led training, web-based, or blended learning.

4. Create courses.

   Courses are specific topics of study found in the learning catalog for which you offer classes.

5. Define delivery methods for courses.

6. Define classes.

   Aclass is an instance of a course and delivery method, such as the instructor-led Sales Training class that runs from March 15 to March 17. Learners enroll at the class level.

7. Rebuild the catalog index.

Note: The default values that appear on many of the pages that are discussed in this documentation are from the Install Defaults and Learning Environment components.

Related Links

Defining Default Processing Rules and Options
Defining Learning Environments
Building Learner Groups
Understanding Management of Classes

Class Templates

You can use class templates to quickly define new classes, as well as to define new courses and delivery methods. If you choose to create new courses or delivery methods, you will enter basic required information as specified in the template.

Related Links

Defining Class Templates

Defining Learning Categories

To define learning categories, use the Maintain Categories (LM_CATG_LA_CMP) component.

Pages Used to Define Learning Categories

Page Name	***Definition Name***	***Usage***
Maintain Categories - Basic Data Page	LM_CATG_BSC_PG	Define basic category information, such as name, description, status, and owner.
Maintain Categories - Relationships Page	LM_CATG_SECURTY_PG	Define category relationships.
Maintain Categories - Attributes Page	LM_CATG_REL_LA_PG	View a category's courses and parent categories.

Understanding Categories

Categories enable you to classify courses and programs so that learners and managers can easily find appropriate learning in the catalog. When using the advanced search feature, users can search the catalog by category. Categories are also used when filtering the Find Learning page using the By Category facet.

Courses and programs can belong to multiple categories. For example, you might create separate insurance and manufacturing categories and include a risk management item in both. Categories can also be hierarchical: a manufacturing category might include logistics management and materials management subcategories. If you plan to create nested categories, it is more efficient to create the subcategories first.

Carefully plan the types of categories that you need, keeping in mind that categories, courses, classes, and programs can be shared across learning environments. Categories significantly impact the usability of your catalog because learners rely on categories to find offerings in the catalog. Therefore, be sure to define categories that make logical sense to your learners.

Note: (FRA) To make it easy for learners and administrators in France to find learning that qualifies for DIF (Droit Individuel à la Formation), consider creating one or more categories for DIF-eligible learning. Include *DIF* in the category name to facilitate searches. Alternatively, you might create a keyword called DIF and assign it to DIF-eligible courses.

See Updating the Catalog Indexes.

See Defining Keywords.

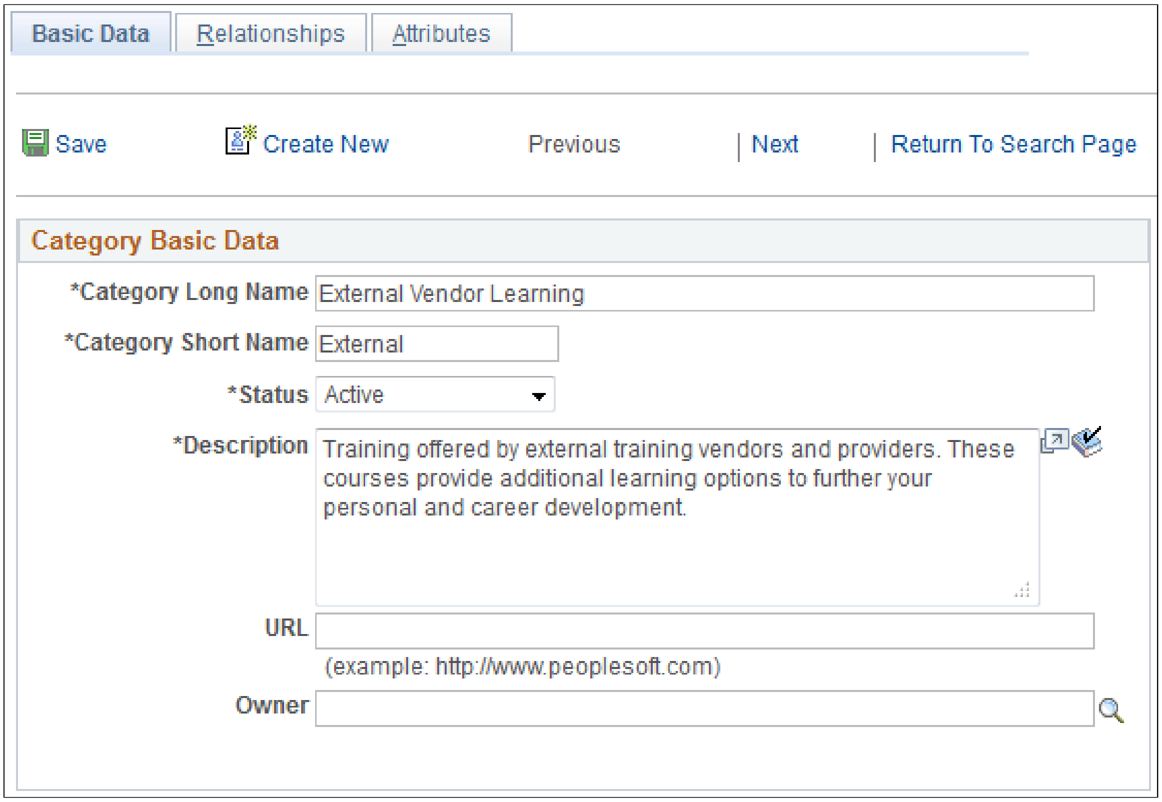
Maintain Categories - Basic Data Page

Use the Maintain Categories - Basic Data page (LM_CATG_BSC_PG) to define basic category information, such as name, description, status, and owner.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Categories** > **Basic Data**

This example illustrates the fields and controls on the Maintain Categories - Basic Data page.



Note: When you create a category or change the long name and status of an existing category, you must rebuild the catalog index before the changes are reflected in the catalog search results.

See Updating the Catalog Indexes.

Field or Control	***Description***
Owner	Select the person who has the main responsibility for this category. Typically, this is the administrator who is responsible for updating the category. The entry here is informational only —it does not determine who can update the category.

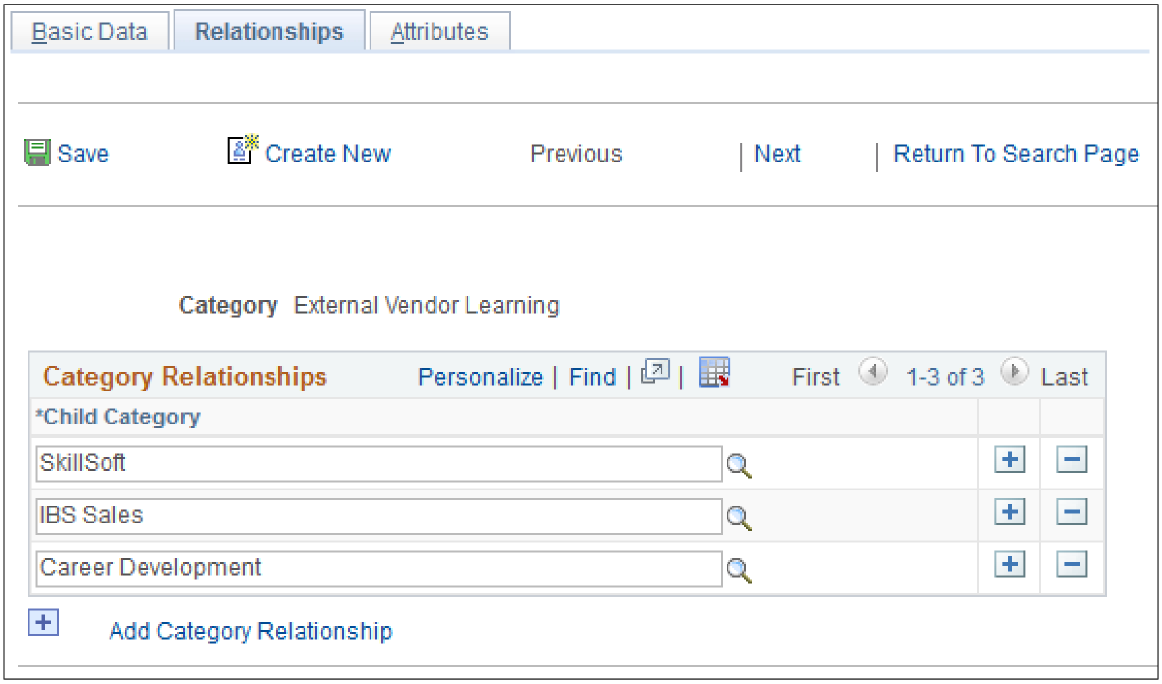
Maintain Categories - Relationships Page

Use the Maintain Categories - Relationships page (LM_CATG_SECURTY_PG) to define category relationships.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Categories** > **Relationships**

This example illustrates the fields and controls on the Maintain Categories - Relationships page.



Note: When you update the relationships for an existing category, you must rebuild the catalog index before the changes are reflected in the catalog search results.

See Updating the Catalog Indexes.

Category Relationships

Identify categories in the catalog that are subsets of this one. When users filter the Find Learning page by this category, the system also lists the subcategories that you identify here.

Field or Control	***Description***
Child Category	Select the related category. You can select from any categories that are associated with your own learning environment.

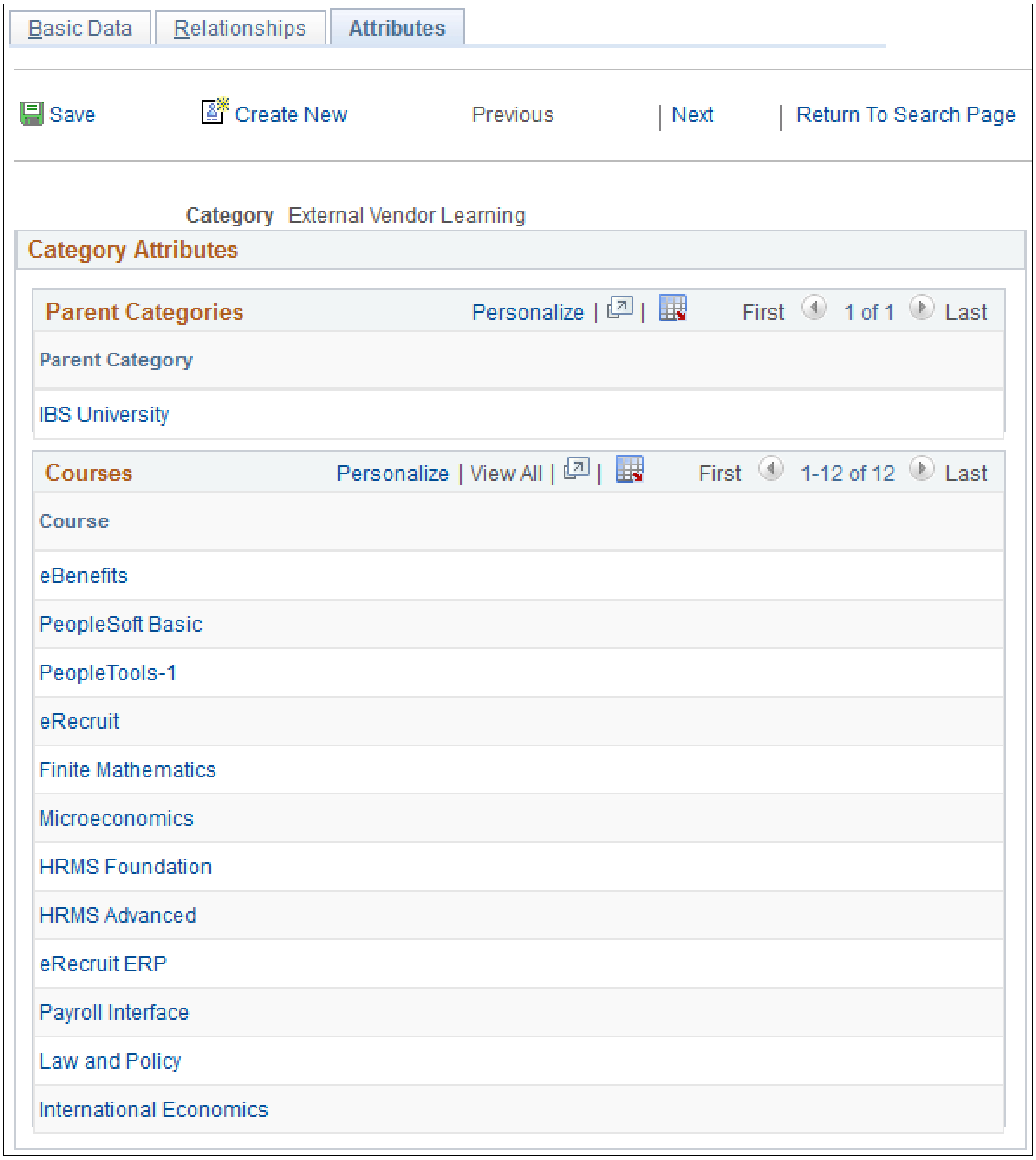
Maintain Categories - Attributes Page

Use the Maintain Categories - Attributes page (LM_CATG_REL_LA_PG) to view a category's courses and parent categories.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Categories** > **Attributes**

This example illustrates the fields and controls on the Maintain Categories - Attributes page.



Parent Categories

This scroll area displays categories for which this category is a subcategory.

Courses

This scroll area displays the list of courses that belong to this category.

Defining Keywords

To define keywords, use the Maintain Keywords (LM_KWRD_CMP) component.

Page Used to Define Search Keywords

Page Name	***Definition Name***	***Usage***
Maintain Keywords Page	LM_KWRD_PG	Create keywords to use when searching the learning catalog.

Understanding Keywords

Keywords are an optional feature used to help learners and administrators find specific learning options in the learning catalog. Like categories, keywords make it easy for users to search the catalog for applicable classes. After you define keywords, you associate them with courses and programs. Then, users can enter a keyword in the Description field on search pages to have the system search for classes (courses) or programs that are associated with that keyword.

Associate each keyword with one or more keyword types, such as Technical, Interpersonal Skills, Management, and so on. This makes it easier for you to update and maintain a large number of keywords. Before you begin adding keywords, think about the logical groupings—the keyword types—that are appropriate for your catalog.

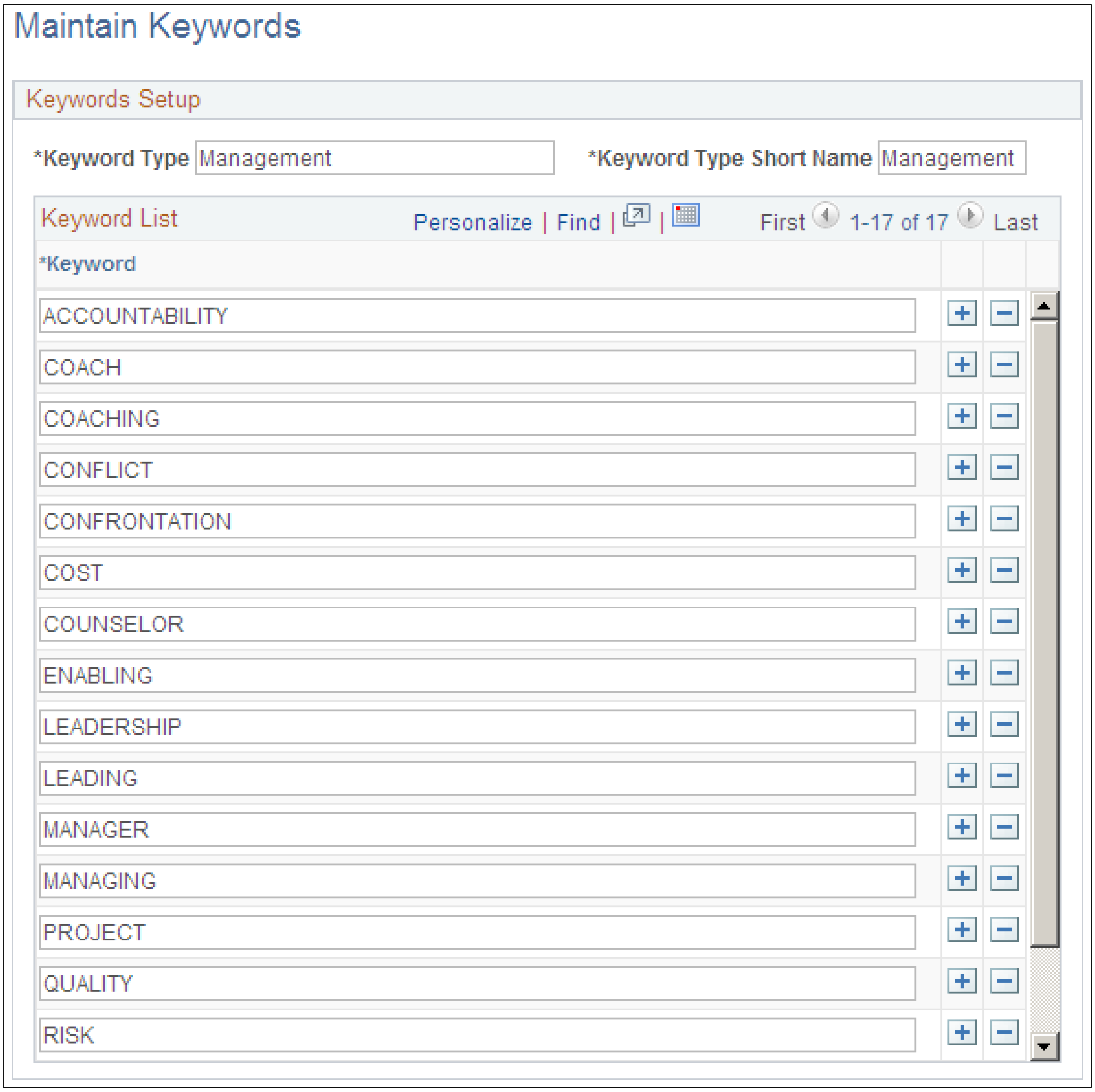
Maintain Keywords Page

Use the Maintain Keywords page (LM_KWRD_PG) to create keywords to use when searching the learning catalog.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Keywords** > **Maintain Keywords**

This example illustrates the fields and controls on the Maintain Keywords page.



To define keywords:

1. Enter a keyword type.

   Keyword types help you group keywords, which makes it easier to maintain large numbers of keywords.

2. In the Keyword column, enter each keyword that is associated with the keyword type.

Note: It is not necessary to enter variations of the same word. When a user searches for classes by keyword, the system automatically determines the root word and looks for all of its variations, such as *listen* and *listening.*

Attach keywords to courses on the Maintain Courses - Attributes page.

Defining Delivery Method Types

To define delivery method types, use the Delivery Method Type (LM_DMTHD_TYPE) component.

Page Used to Define Delivery Method Types

Page Name	***Definition Name***	***Usage***
Delivery Method Type Page	LM_DMTHD_TYPE	Define delivery method types for your organization.

Understanding Delivery Methods

Delivery methods define how course offerings are presented to learners—for example, through online learning, classroom instruction, seminars, books, and so forth—in your organization. Learners can search the catalog for offerings by delivery method, so they could look at only classes that are instructor led, for example, if that is how they learn best. Also, while the system does not enforce rules in the definition of delivery methods (for instance, you can create a session learning component in a class tied to a self-paced delivery method), delivery methods help learners better understand the offerings in the learning catalog.

When you create a course, you identify the specific delivery methods through which its classes are offered. The same course might be delivered multiple ways, such as through a webcast, a web-based workbook, or a scheduled class. Each delivery method identifies the delivery method type. There are no restrictions on how many delivery methods you can define or how you can name them. You can even create compound delivery methods, such as a single delivery method for classroom training and webcast.

Important! To enable learners to view learning for a given delivery method type on the self-service My Learning page, and managers to view learning for the same delivery method type through the Team Learning page, use the Learning Filters (LM_FILTER) component to specify which delivery method types to make visible to users.

Related Links

Defining Search Filters

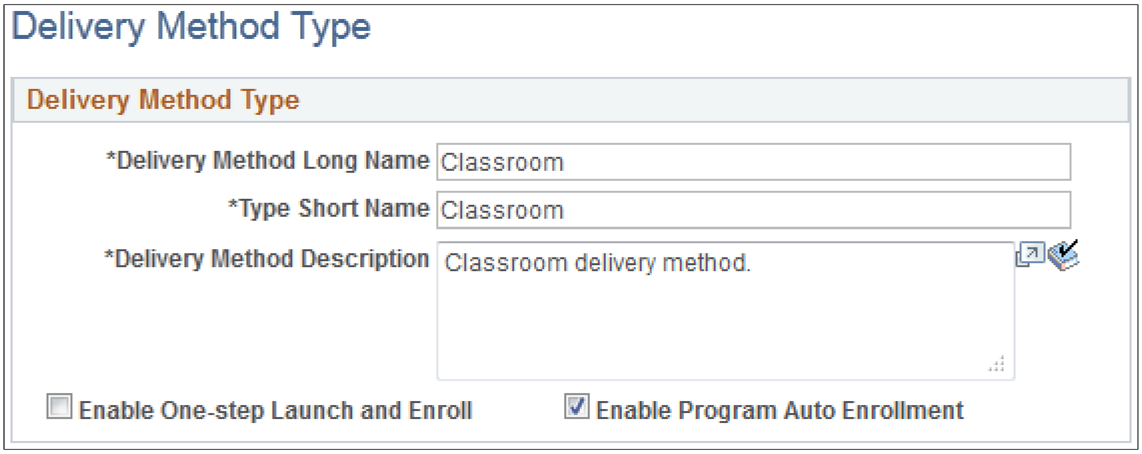
Delivery Method Type Page

Use the Delivery Method Type page (LM_DMTHD_TYPE) to define delivery method types for your organization.

Navigation:

Set Up ELM > **Catalog** > **Delivery Method Type** > **Delivery Method Type**

This example illustrates the fields and controls on the Delivery Method Type page.



Field or Control	***Description***
Delivery Method Long Name	Enter a long name for the delivery method type.
Type Short Name	Enter a short name for the delivery method type.
Delivery Method Description	Enter a description of the delivery method type.
Enable One-step Launch and Enroll	Select to enable learners to launch classes with this delivery method type and enroll in them simultaneously with one click. When this check box is selected, the **Enroll** button is replaced by a **Launch** button for classes with this delivery method type, if the following conditions are met: 1. The class does not require approval. 2. The class includes one or more learning components that are launchable.
Enable Program Auto Enrollment	Select to enable the system to automatically enroll learners in a class with this delivery type when they are registered for programs that include the class. You can override this value at the class level on theMaintain Classes - Class Details Page. **Note:** If you change this value for a delivery method and classes exist in pending or active status for that delivery method, you receive a message asking if you want to change the value of this field for those classes to match the delivery method. Click **Yes** to update this value for all of the associated classes.

Defining the Education Unit Type

Pages Used to Define the Education Unit Type

Page Name	Definition Name	Usage
Education Unit Type Page	LM_EU_SETUP_PG	Define types of education units.

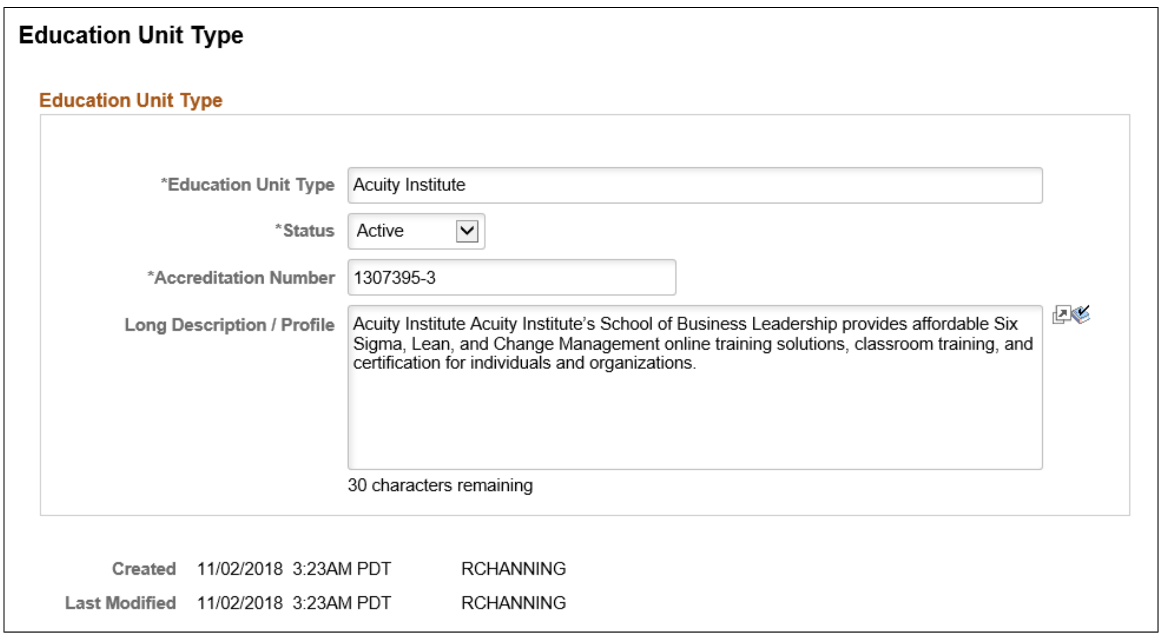
Education Unit Type Page

Administrators use the **Education Unit Type** page to define types of education units.

Navigation:

Setup ELM > **Education Unit Type**

This example illustrates the fields and controls on the Education Unit Type page.



Field or Control	Description
Education Unit Type	Enter the name of the agency that provides training programs and credits/education units.
Status	Select the status of the agency. The available values are **Active** and **Inactive**.

Field or Control	Description
Accreditation Number	Enter the Accreditation number of the agency being added as an Education Unit Type. In this field, you can enter up to 30 characters, including numbers, alphabets and special characters.
Long Description / Profile	Enter a description or profile of the agency.

Creating Courses

To create courses, use the Maintain Courses (LM_CI_LA_CMP) component.

Each course represents a specific topic of study for which you offer classes. All classes that are associated with a given course share the same prerequisites, objectives, equivalencies, and other features.

Note: When you create or modify courses, you must rebuild the catalog index before the changes are reflected in the catalog search results.

Pages Used to Create Courses

Page Name	Definition Name	Usage
Course Details: Basic Data Page	LM_CI_BASICDTA_PG	Define basic item information, such as description and course code.
Course Details: Prerequisites Page	LM_CI_PRQ_PG	Identify prerequisites, which are other courses and objectives that one must complete or can complete if recommended, before a user can enroll in this course.
Course Details: Equivalents Page	LM_CI_EQUIV_PG	Identify courses and objectives that are equivalent to a given course.
Course Details: Notes and Attachments Page	LM_CI_NANDA_PG	Add notes and attachments (such as documents to read before beginning a class) to a course.
Course Details: Security Page	LM_LE_CI_PG	Define security for courses.
Maintain Courses - Attributes Page	LM_CI_ATTRIB_PG	Define category relationships, keywords, and objectives.

Page Name	Definition Name	Usage
Maintain Courses - Delivery Method Page	LM_CI_DLVRY_PG	Specify which delivery methods are applicable to a given course.

Prerequisites

Before you create courses, you must define:

- Categories.

  See Updating the Catalog Indexes.

- Delivery method types.

  See Defining Delivery Method Types.

- (Optional) Approval process definitions.

  See Understanding the Approval Framework.

- (Optional) Keywords.

  See Defining Keywords.

- (Optional) Objectives.

  See Understanding Objectives.

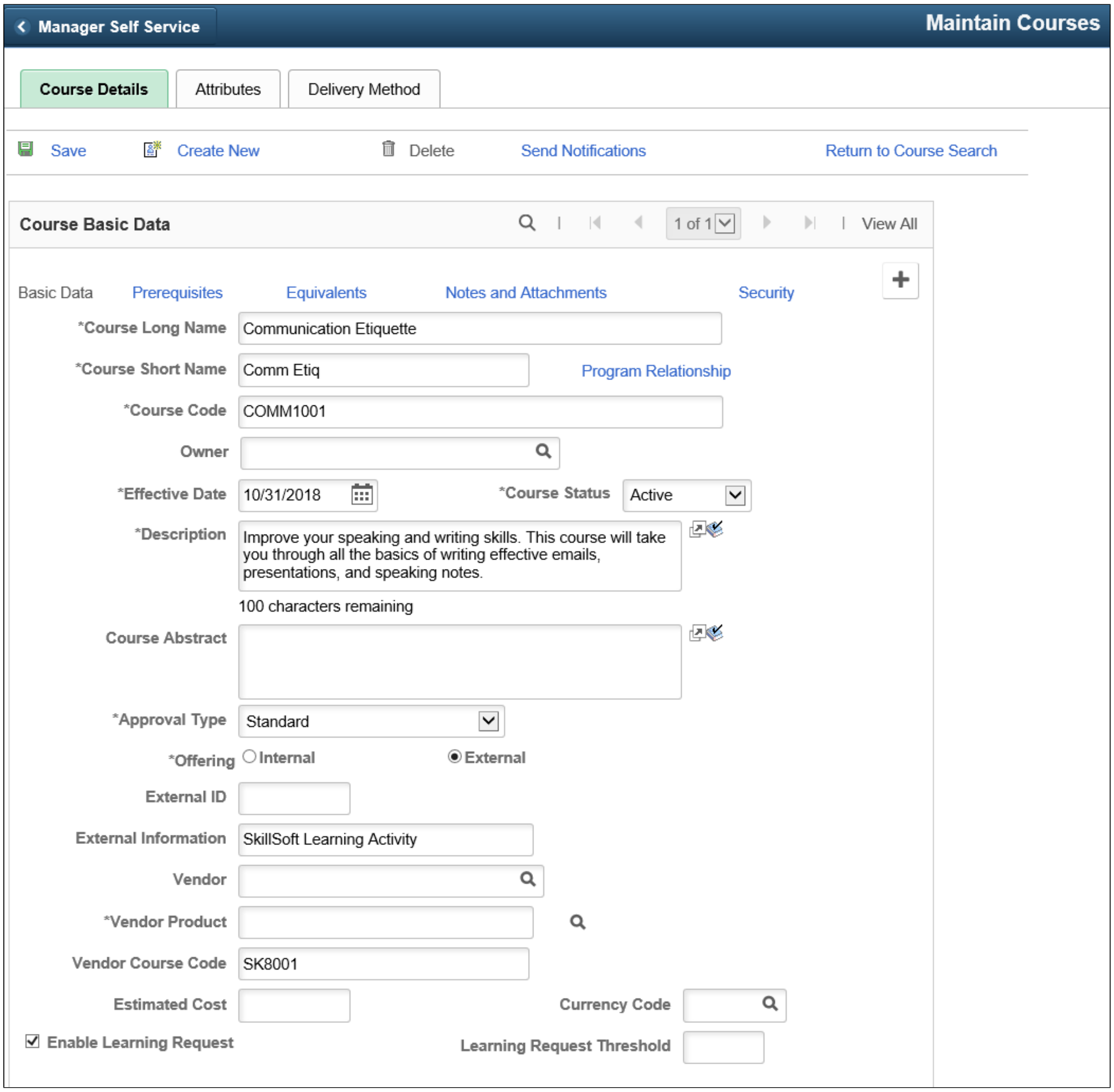
Course Details: Basic Data Page

Use the Course Details: Basic Data page (LM_CI_BASICDTA_PG) to define basic item information, such as description and course code.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Courses** > **Course Details**

This example illustrates the fields and controls on the Course Details: Basic Data page.



Note: When you modify the course long name, description, course code, effective date, or course status, you must rebuild the catalog index before the changes are reflected in the catalog search results.

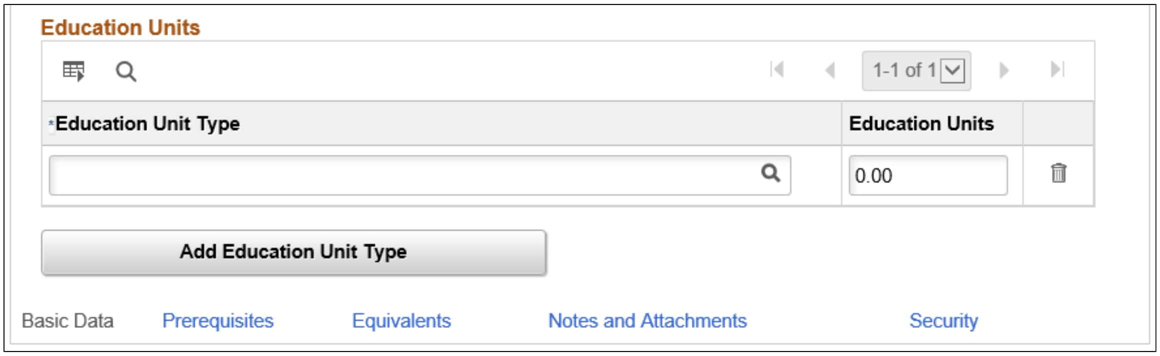
See Updating the Catalog Indexes.

Field or Control	***Description***
Program Relationship	Click to list any programs that include this course.

Field or Control	Description
Course Code	Enter an identifier for the course. The value that you enter must be unique if the Course Code Option on the Install Defaults - General page is set to Restricted. If that option is set to Restricted by LE, the value you enter must be unique to your current learning environment. **Note:** If you enable automatic course code generation on the Install Defaults - Counter Records (LM_CNTR_SETUP_PG) page, the system creates a course code for new courses when you click **Save.** See Install Defaults – Counter Records Page.
Owner	Enter the name of the person whom the system notifies when the course is updated. **Note:** Any learning administrator who is associated with one of the learning environments for this course (as defined on the Item - Security page) can update this course.
Course Status	Select a course status: *Active:* This is the default status when you create a new course. *Inactive:* Indicates that neither delivery methods nor classes can be defined for the course. Also, if selected, the item and its classes do not appear in the catalog, and learners cannot enroll in related classes. *Pending:* Indicates that only delivery methods with a status of *Pending* can be defined for the course. Also, if selected, the item and its classes do not appear in the catalog, and learners cannot enroll in related classes.
Course Abstract	Enter an abstract of the course. This entry appears on the <Course Name> page that users can access when searching the catalog. If you do not provide an abstract the system displays the course description to the learner when searching the catalog. See Using the Learning Catalog.
Approval Type	Select a value if approval is required to enroll in a class that is associated with this course. This option can be overridden at the class level. Select from the approval process definitions that have been defined for your organization. See Understanding the Approval Framework.

Field or Control	*Description*
Offering	Select whether the class is offered internally or externally. The default is *Internal*.
External ID	Enter the (numeric) external course ID, if one is associated with the course.
External Information	Enter information about a class that a vendor delivers. The learning catalog does not display this information. Only administrators can view this information.
Vendor	Select the vendor that supplies the learning, if applicable.
Vendor Product	Select the vendor product that is used with this course. The cost of the selected product appears on the Class Costs page. Define vendor products on the Vendor Products page.
Vendor Course Code	Enter the vendor-supplied course code if you purchased this course from a third-party content provider.
(FRA) Learning Class (learning classification)	This field only appears when French features are enabled for the administrator's current learning environment. Select the default learning classification to associate with the classes for this course. Administrators can override the classification during enrollment. Classifications are used when generating training plans and the 2483 report. See Understanding Regulatory Requirements for France.
(FRA) Eligible for DIF	This field only appears when French features are enabled for the administrator's current learning environment. Selecting this check box enables learners and administrators to request the use of DIF hours when enrolling in classes associated with this course.
Estimated Cost and Currency Code	The default values that appear here are inherited from the administrator's learning environment. The cost value can be used to calculate forecasted training costs when you produce training plan budgets. It represents the estimated cost, per learner, of delivering the class and can be overridden at the delivery method level.
Enable Learning Request	Select to allow learners to choose this course when submitting a learning request.
Learning Request Threshold	If learning requests are enabled, you can specify how many requests must be made before the administrator is notified.

This example illustrates the fields and controls on the Course Details: Basic Data page – Education Units group box. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Education Units group box	Use this group box to add, edit or delete Education Unit related information. Use the lookup icon to select the Education Unit Type. In the Education Units field, enter the number of units. For new classes, the system populates this field by default from the Course Detail page and this remains editable at the class level. Use the **Add Educational Unit Type** button to add a new row. You can add up to five new rows. **Note:** The Education Units group box replaces the single field for Education Unit which was available in the previous versions of the product. If your courses had values in the single field for Education Units, you need to re-enter the units along with the Education Unit Type.

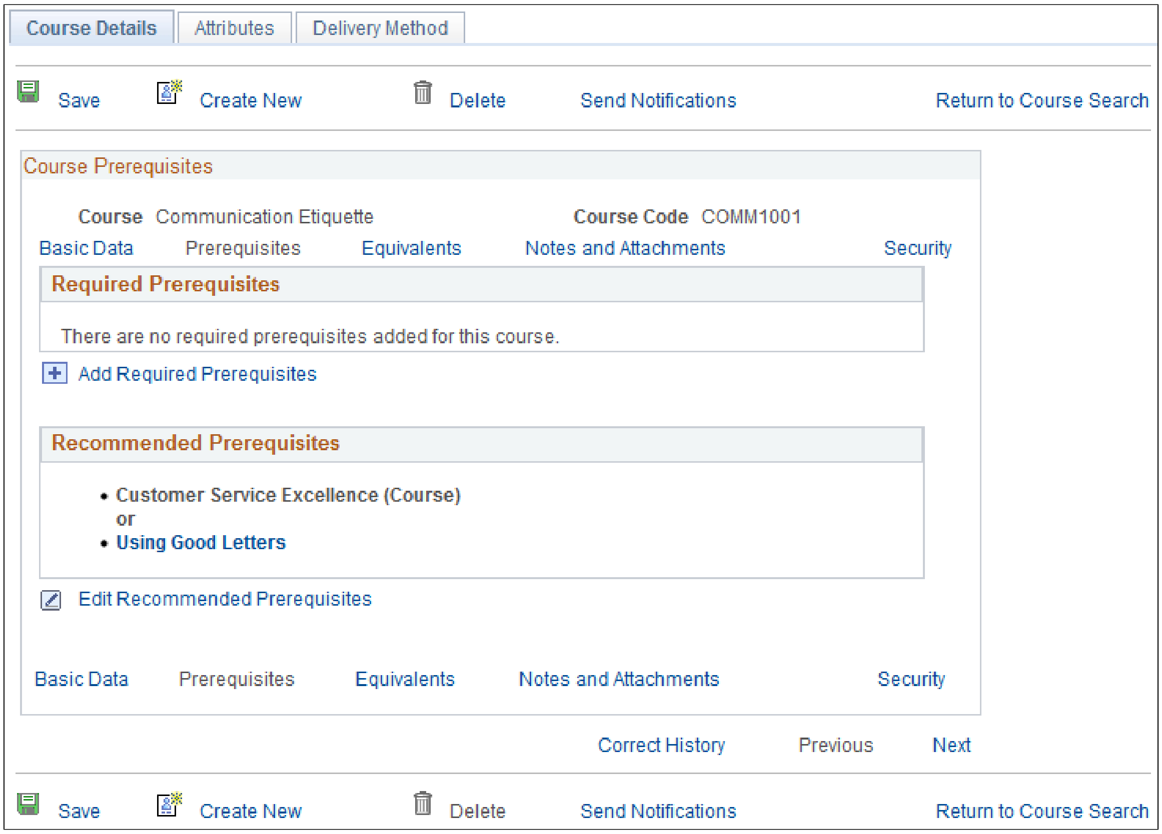
Course Details: Prerequisites Page

Use the Course Details: Prerequisites page (LM_CI_PRQ_PG) to identify prerequisites, which are other courses and objectives that one must complete or can complete if recommended, before a user can enroll in this course.

Navigation:

Click the Prerequisites link on the Course Details: Basic Data page.

This example illustrates the fields and controls on the Course Details: Prerequisites page.



Course Prerequisites

Select all courses, objectives, and programs that are prerequisites for this course. Administrators can override prerequisites for learners during group and mass enrollment. Managers cannot override prerequisites for a learner directly, but can use the Supplemental Learning page to give learners waivers on courses, objectives, and programs.

See Understanding Supplemental Learning.

Field or Control	***Description***
Type	Select the type of prerequisite from the following options: *Course, Objective,* or *Program.*
Prerequisite	Select the name of the prerequisite course, objective, or program.

Field or Control	***Description***
Relationship	Select a value: • Select *End* if this is the last prerequisite. • Select *And* if there are additional prerequisites. • Select *Or* if this prerequisite can be met by completing the next prerequisite that you enter. The system displays the text that appears in the catalog directly above the **Course Prerequisites** group box. **Important!** The system ignores any prerequisites that are listed after *End*.
Proficiency	This field applies to objectives that are selected as prerequisites. If the objective is associated with a rating model, select the required proficiency level.

Recommended Prerequisites

These fields are similar to the Course Prerequisites fields. Use them to select classes, programs, and objectives that learners should complete before taking the class. Recommended prerequisites that are not met do not prevent the learner from enrolling in the class.

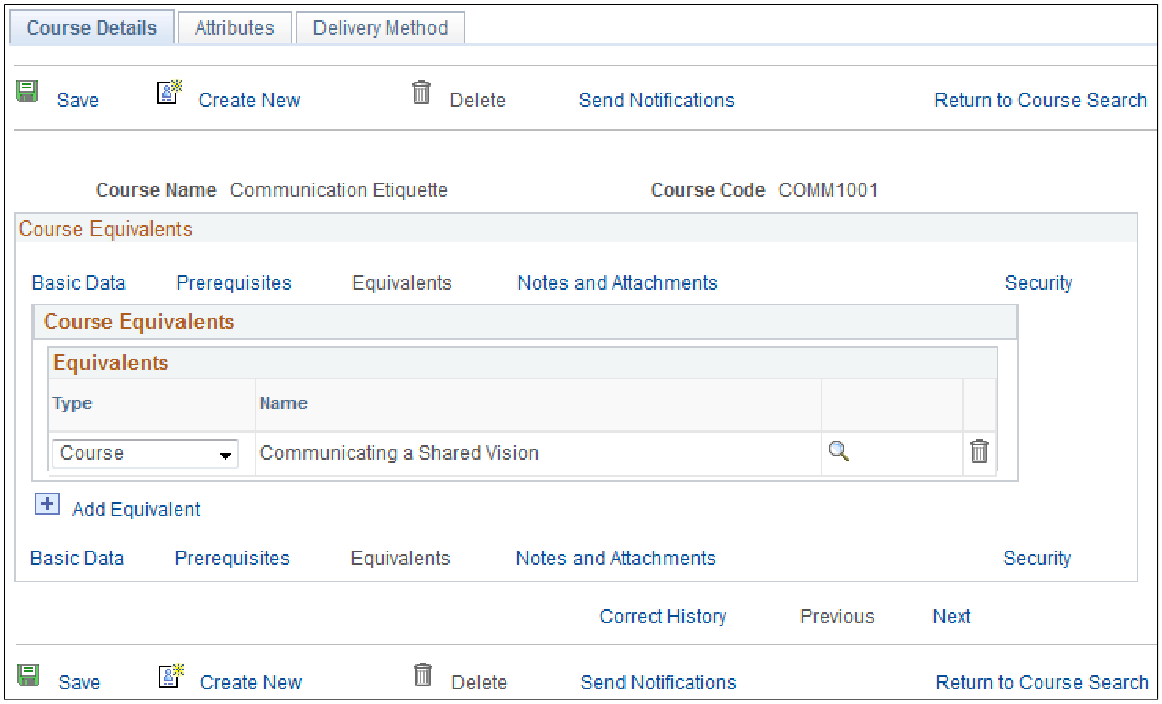
Course Details: Equivalents Page

Use the Course Details: Equivalents page (LM_CI_EQUIV_PG) to identify courses and objectives that are equivalent to a given course.

Navigation:

Click the Equivalents link on the Course Details: Basic Data page.

This example illustrates the fields and controls on the Course Details: Equivalents page.



If another course or program is considered to be the equivalent of this one, select the equivalent item. The system does not perform any checks to determine if equivalent items have the same objectives.

For example, suppose that a course called Intermediate C Programming has a prerequisite of Introduction to C Programming. If you select Introduction to C++ as an equivalent to Introduction to C Programming, learners who complete either Introduction to C Programming or Introduction to C++ meet the prerequisite for Intermediate C Programming.

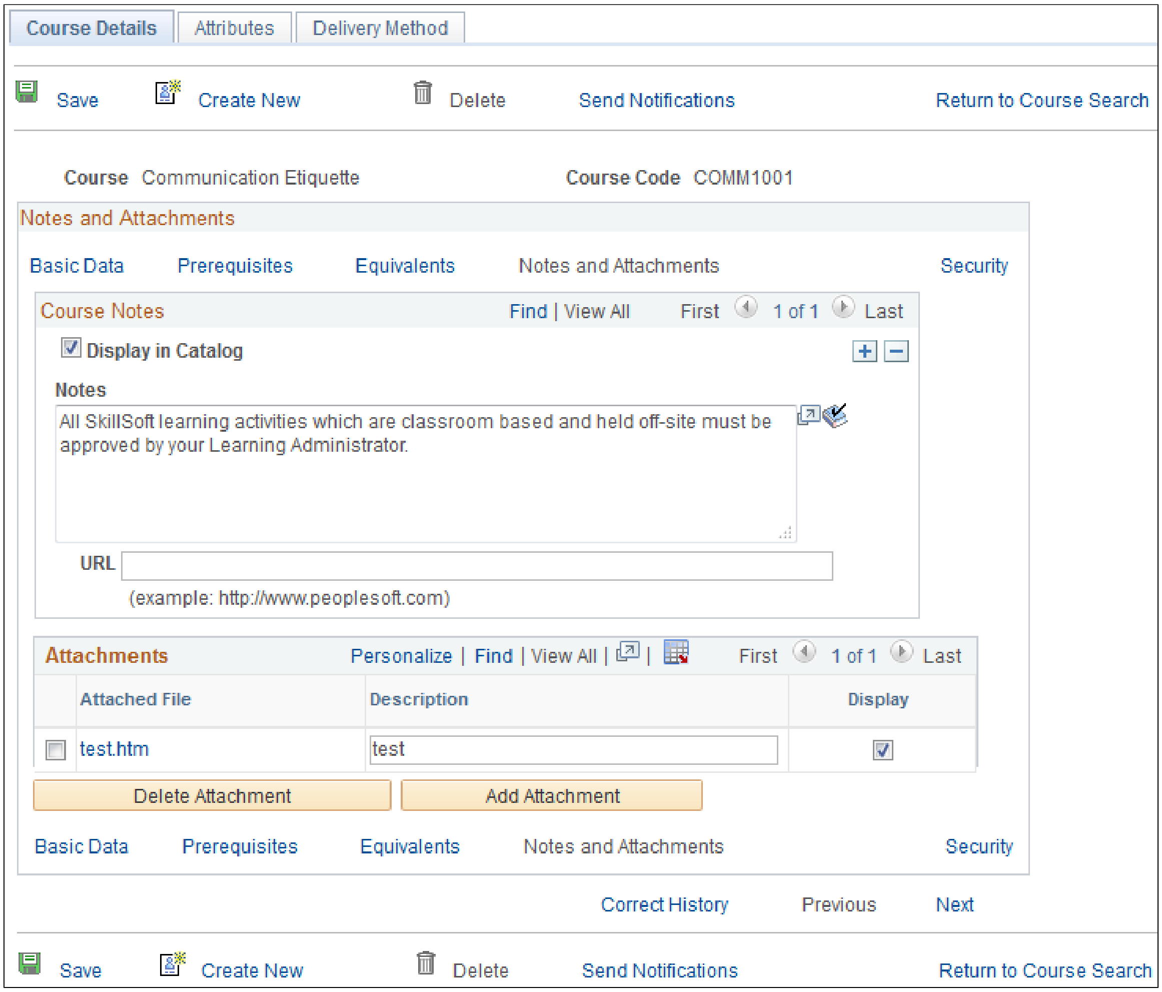
Course Details: Notes and Attachments Page

Use the Course Details: Notes and Attachments page (LM_CI_NANDA_PG) to add notes and attachments (such as documents to read before beginning a class) to a course.

Navigation:

Click the Notes and Attachments link on the Course Details: Basic Data page.

This example illustrates the fields and controls on the Course Details: Notes and Attachments page.



You can enter notes and attach files, such as documents to read before beginning a class. To enable users to access notes, URLs, or attachments from the catalog, select the Display in Catalog check box. Attachments can be included elsewhere in the system, including at the class level.

Note: The URL associated with a course note displays in the catalog only if you also enter text in the Notes field for the note.

To attach a file to an item:

1. Click the **Add Attachment** button to access a new page and navigate to the file's location on your server.

2. Locate the file and click the **Upload** button.

Note: Your system configuration determines the size of the files that you can attach to courses.

Related Links

Attachment Location Uniform Resource Locators (URLs)

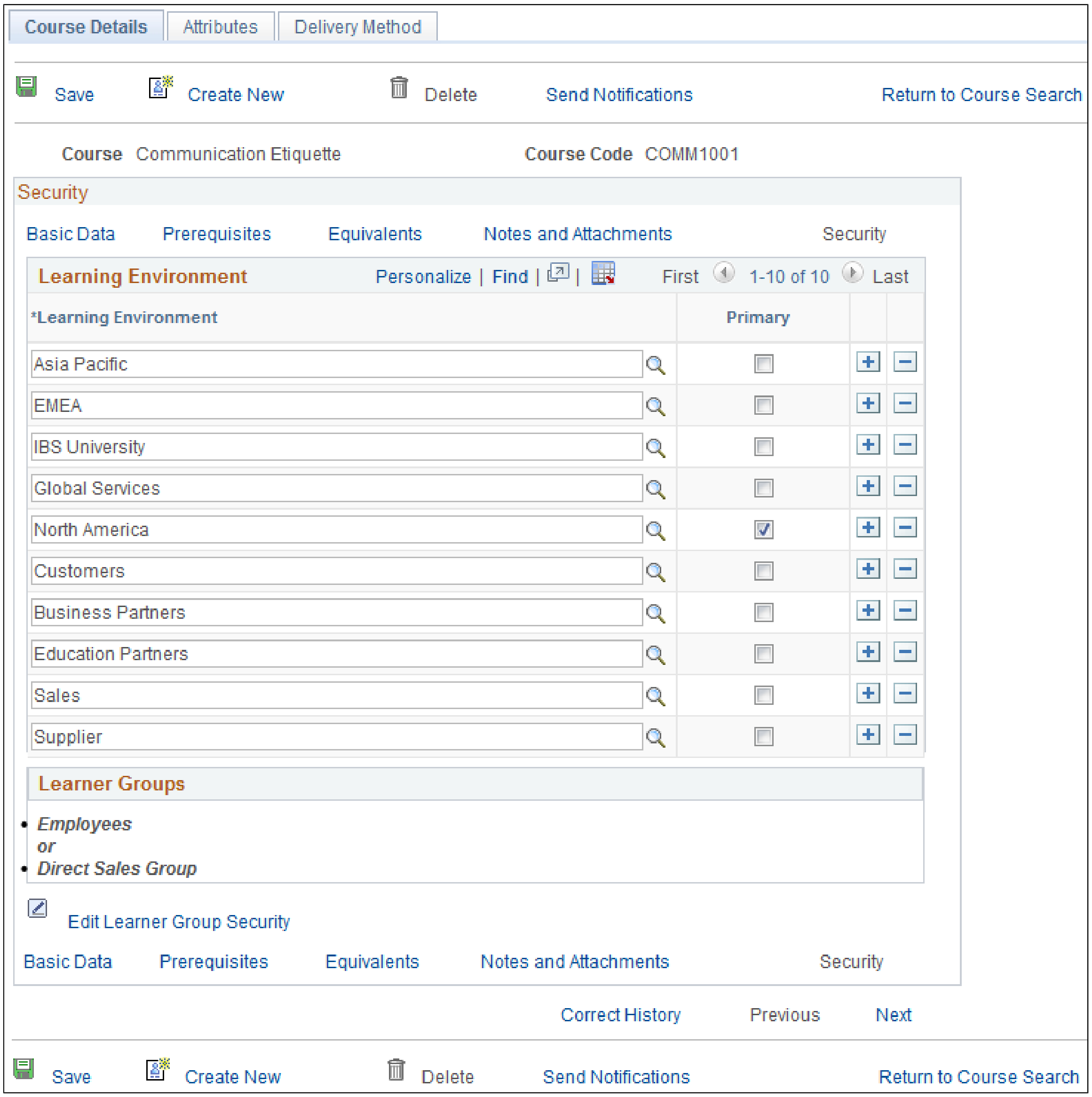
Course Details: Security Page

Use the Course Details: Security page (LM_LE_CI_PG) to define security for courses.

Navigation:

Click the Security link on the Course Details: Basic Data page.

This example illustrates the fields and controls on the Course Details: Security page.



Note: When you add or remove learning environments or learner groups to courses, you must rebuild the catalog index before the changes are reflected in the catalog search results.

See Updating the Catalog Indexes.

Learning Environment

Use these fields to specify the learning environments for which this course is valid.

Field or Control	*Description*
Primary	A course must be associated with at least one learning environment. The system displays the administrator's current learning environment as the default. You cannot remove the primary learning environment from this page without first selecting another environment as the primary. You can change the primary learning environment on this page at any time.

Learner Groups

Click the **Edit Learner Group Security** link to display fields for adding or editing learner groups. Specify which learner groups can access this course when searching the catalog. You can select from the learner groups that have been defined for any of the learning environments associated with the course.

Field or Control	*Description*
Relationship	Specify how this learner group is related to others in the list when used to determine whether or not a person has access. Values are: *And:* A learner must be a member of both this learner group and the next in the list. *Or:* A learner must be in this learner group or the next in the list. *End:* A placeholder for the last learner group in the list. The system ignores any learner groups that are listed after *End.* For example, to define security such that a learner must be a member of learner group A, and a member of learner group B or learner group C, you must reuse learner group A. The resulting security would look like this: Learner group A *and* Learner group B *or* Learner group A *and* Learner group C *end.* **Important!** Associate a category with at least one learner group. If you do not select a learner group, learners cannot access this category.

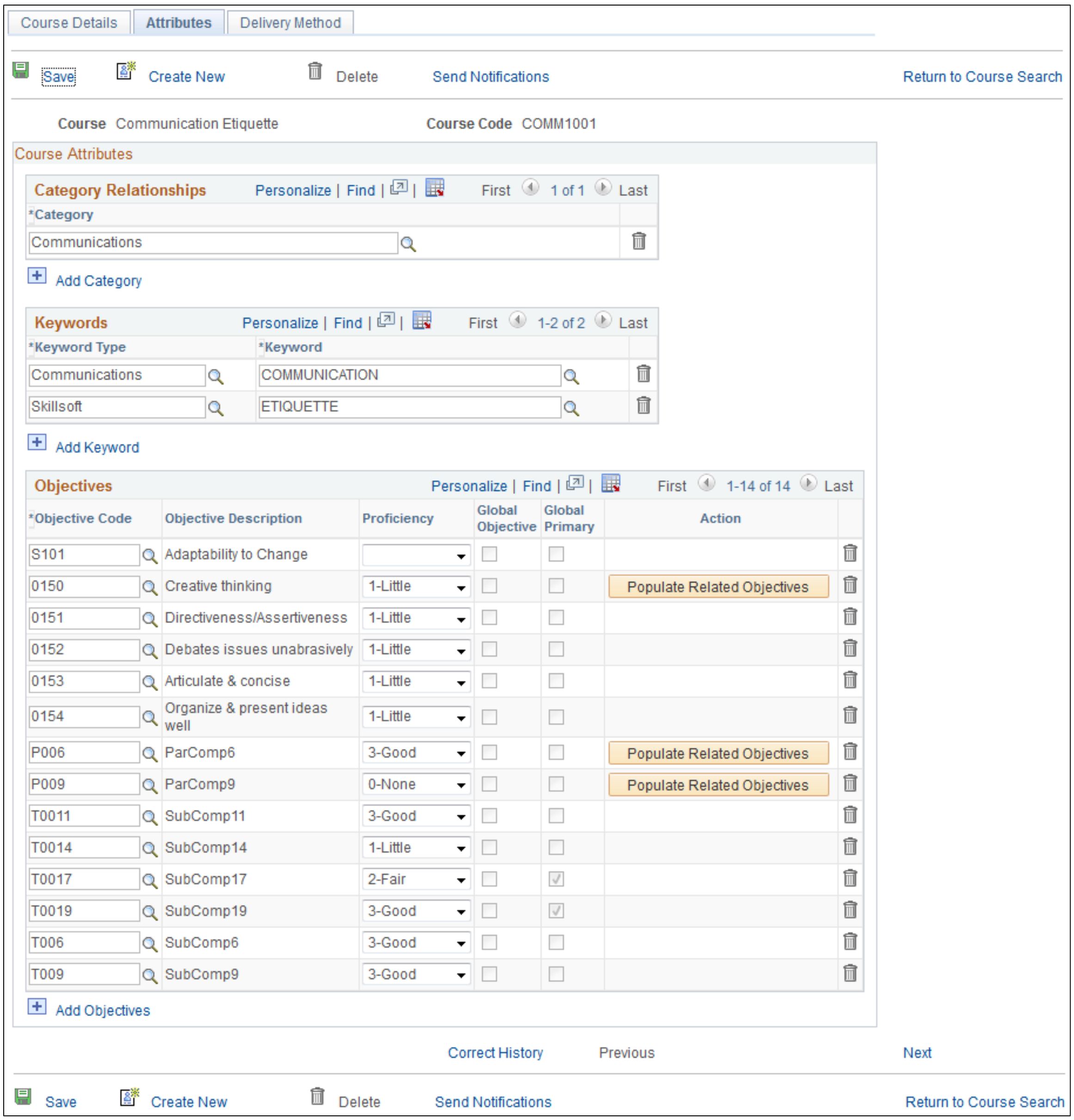
Maintain Courses - Attributes Page

Use the Maintain Courses - Attributes page (LM_CI_ATTRIB_PG) to define category relationships, keywords, and objectives.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Courses** > **Attributes**

This example illustrates the fields and controls on the Maintain Courses - Attributes page.



Note: When you add, remove, or change keywords, objectives, or category relationships, you must rebuild the catalog index before the changes are reflected in the catalog search results.

See Updating the Catalog Indexes.

Category Relationships

Select the categories under which this item is to be listed in the learning catalog.

Field or Control	***Description***
Category	Select the category to which this course belongs.

Keywords

Keywords help users locate this course and its classes in the catalog. You can enter only keywords that belong to the selected keyword type.

Objectives

Select the objectives that learners meet by completing a class that is associated with this course. Learners receive credit for meeting the objectives that have been directly assigned to them. Define objectives on the Objectives page.

You can associate multiple global objectives with a course, but you can designate only one global objective as primary. Classes are sorted by global objective when you create training plans. For courses with multiple global objectives, only the global objective designated as primary appears on the training plan.

Field or Control	***Description***
Populate Related Objectives	Click to add all the parent objective's related objectives to the Objectives grid for the course. **Note:** This button appears only for objectives imported from PeopleSoft HCM that are associated with one or more sub-items (related objectives). For more information about related objectives, see Understanding Objectives.

Related Links

Understanding Objectives Association to Courses and Programs
Understanding Training Plans

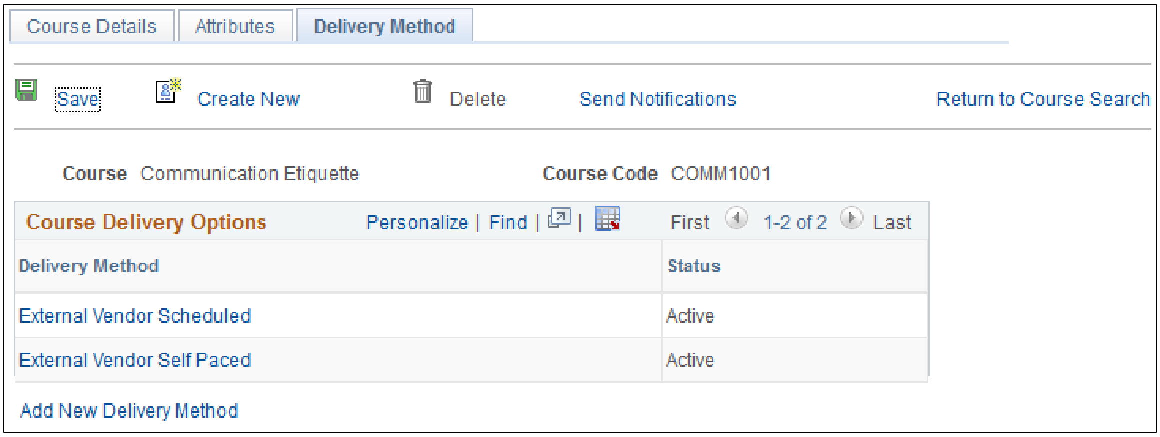
Maintain Courses - Delivery Method Page

Use the Maintain Courses - Delivery Method page (LM_CI_DLVRY_PG) to specify which delivery methods are applicable to a given course.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Courses** > **Delivery Method**

This example illustrates the fields and controls on the Maintain Courses - Delivery Method page.



Note: For new courses, the system hides this page until you save the item.

To add a supported delivery method for this course, click the Add New Delivery Method button to access the Delivery Methods component. When you add a delivery method and return to this page, the system lists the delivery method that you selected here. When a class is created for a course, it must be created in the context of one of the supported delivery methods for that item.

To edit a delivery option, click the delivery method name. The Delivery Methods component opens in update/display mode.

Defining Delivery Methods for Courses

To define delivery methods for courses, use the Maintain Delivery Methods (LM_DMTHDS_LA_GBL) component.

When you add a course to the learning catalog, you specify how its classes can be delivered. You can define one or more delivery methods for each course.

Pages Used to Define Delivery Methods

Page Name	***Definition Name***	***Usage***
Delivery Method Page	LM_DMTHD_BAS_DATA	Define detailed data for the delivery method that is associated with a particular catalog ID.
Delivery Methods - Classes Page	LM_DM_ACTIVITY_PG	View the list of classes that have been defined with the selected delivery methods and add new classes.

Delivery Method Page

Use the Delivery Method page (LM_DMTHD_BAS_DATA) to define detailed data for the delivery method that is associated with a particular catalog ID.

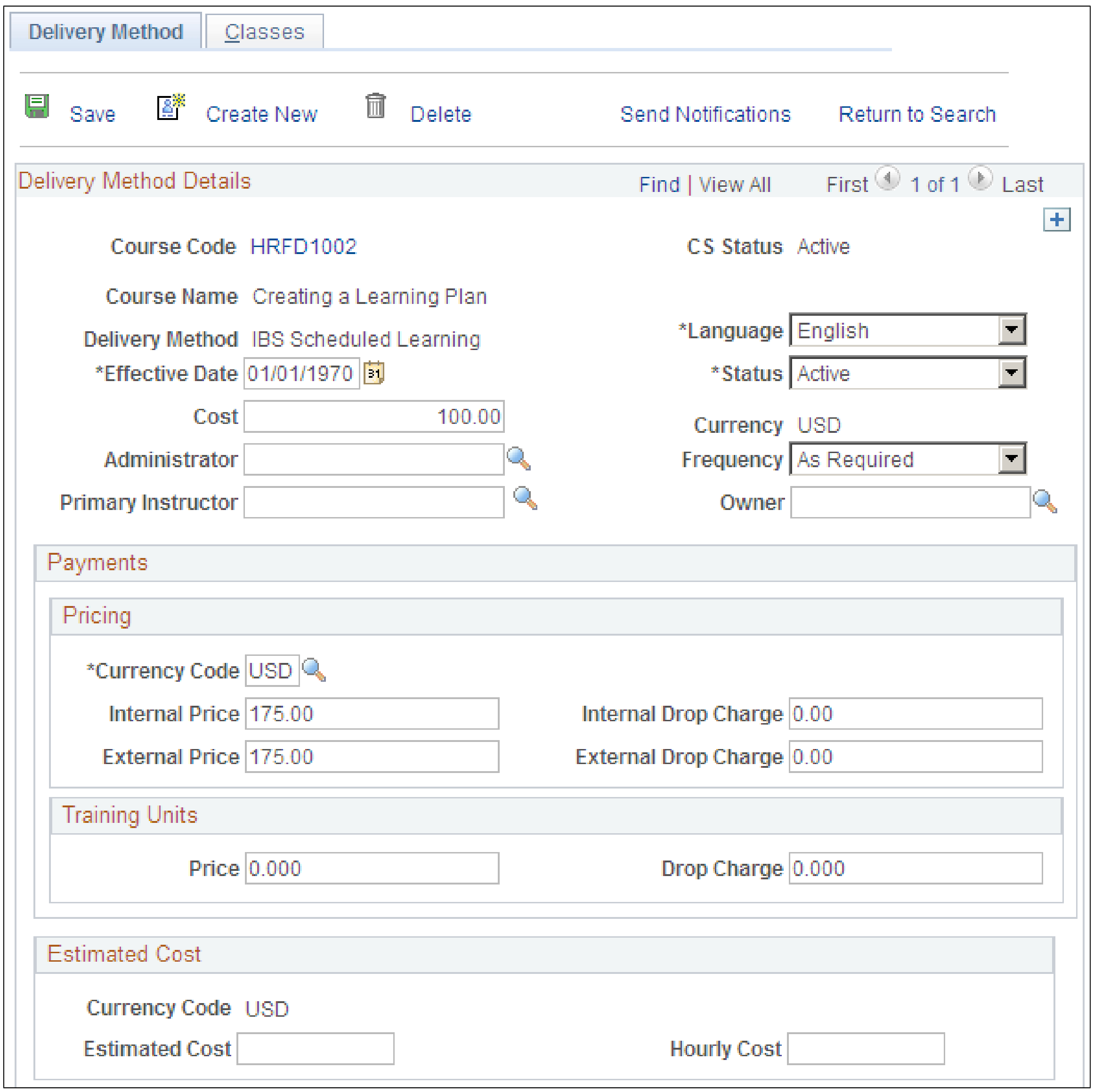
Navigation:

- **Enterprise Learning** > **Catalog** > **Maintain Courses** > **Delivery Method**

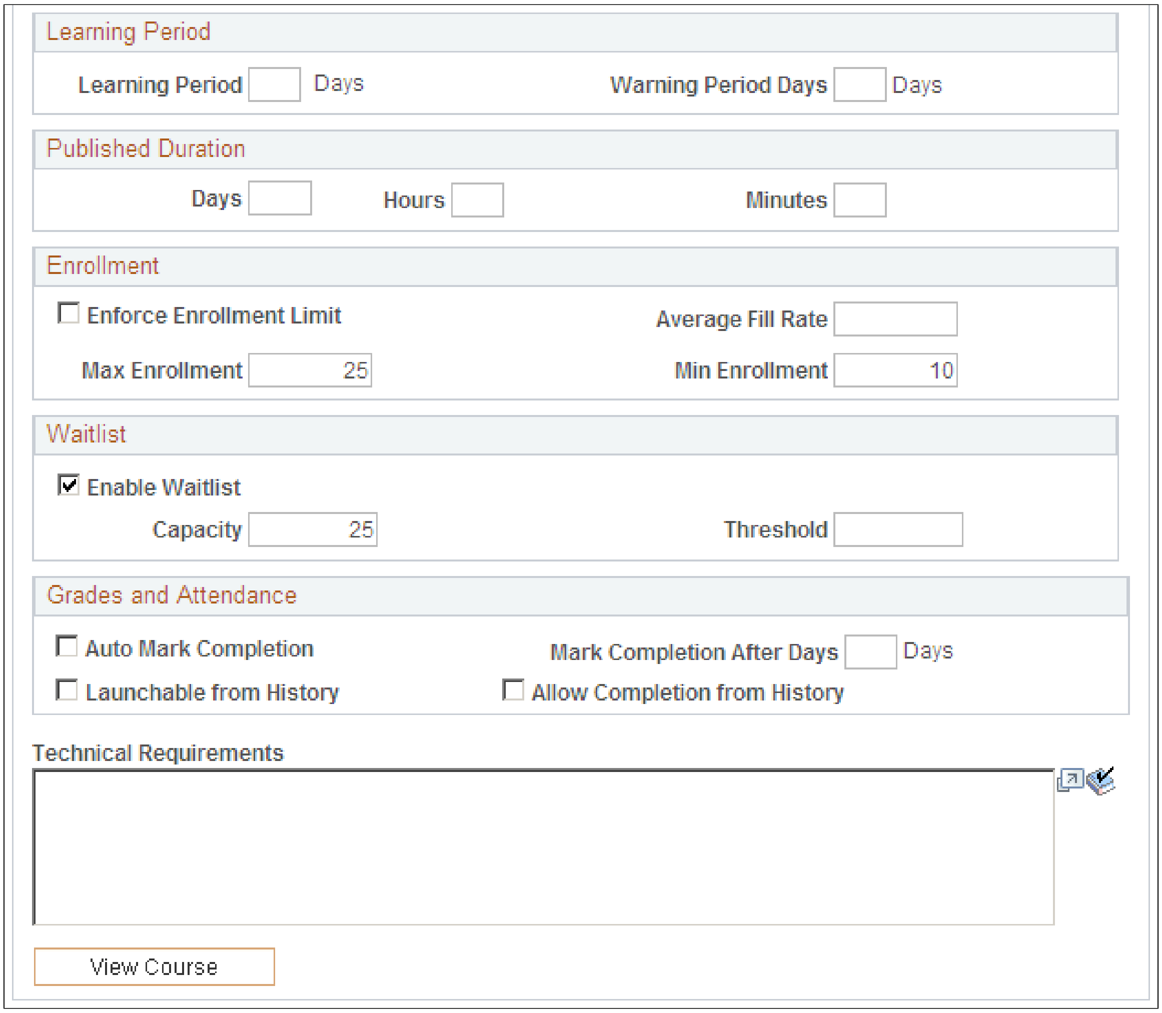
  Click a delivery method link or the Add New Delivery Method button. For new courses, this button appears after you save the new item.

- **Enterprise Learning** > **Catalog** > **Maintain Delivery Methods** > **Delivery Method**

This example illustrates the fields and controls on the Delivery Method page (1 of 2).



This example illustrates the fields and controls on the Delivery Method page (2 of 2).



Delivery Method Details

Field or Control	***Description***
Course Code	Enter the course code to which this delivery method applies. If you access this page from the Items component, the system displays the course code here.
Delivery Method	Select the delivery method type that applies to the delivery method that you are defining. Define delivery method types on the Delivery Method Types page.
Language	Select the language in which the class is offered. Language appears by default from the Learning Environment - Defaults page.

Field or Control	***Description***
Status	Select a delivery method status: *Active:* This is the default status for delivery methods. *Inactive:* Indicates that the delivery method is inactive and cannot be associated to courses. *Pending:* Indicates that the delivery method can be associated only to courses with a status of *Pending.*
Frequency	Enter the frequency at which the class is usually offered. Values are *Annually, As Required, Half-Year, Monthly, Quarterly, Semester,* and *Trimester.*
Administrator	Enter the name of the enrollment administrator whom learners should contact for enrollment information when the registration method is offline.
Cost	Enter the cost of offering the class. This cost does not include instructors, materials, or other resources. The value you enter here appears as the content cost on the Class Costs page. You can override this value at the class level.
Primary Instructor	Enter the instructor for the class, if applicable. You can override this selection at the class level. Define instructors on the Instructors page.
Owner	Enter the person who is responsible for this delivery method. This field is informational only.

Pricing

You can override the selections that you make in this group box at the class level.

Field or Control	***Description***
Currency Code	Select the currency code that applies to the monetary amounts entered in this group box. You can override this selection at the class level on the Class Details page. Currency code appears by default from the Learning Environment - Defaults page.

Field or Control	*Description*
Internal Price	Enter the price that you want to charge internal learners to enroll in classes. Internal learners are learners who you track in your human resource database, such as employees, contractors, and workers.
Internal Drop Charge	Enter the amount that you want to charge internal learners for dropping classes after the drop period, as defined in the **Drop Period** group box.
External Price	Enter the price that you want to charge external learners to enroll in classes. External learners are those who you do not track in your human resource database, such as non employees.
External Drop Charge	Enter the amount that you want to charge external learners for dropping classes after the drop period, as defined in the **Drop Period** group box.

Training Units

You can override the selections that you make in this group box at the class level.

Field or Control	*Description*
Price	Enter the number of training units that you want classes with this delivery method to be worth. If you select training units as a payment option on the Learning Environments - Defaults page, external learners see the value that you enter here when registering for the course. **Note:** Training units only apply to external learners.
Drop Charge	Enter the number of training units that a learner would be charged after dropping the class after the drop period.

Estimated Cost

The values that you enter here can be used to calculate forecasted learning costs when you produce training plan budgets that include classes with this delivery method.

Field or Control	***Description***
Estimated Cost	The default value that appears here is inherited from the course. It represents the estimated cost, per learner, of delivering the class. When you generate a training plan budget, and no estimated hourly amount is defined in the Hourly Cost field, the system uses the cost entered here to determine the forecasted cost for the class.
Hourly Cost	The default value that appears here is inherited from the administrator's learning environment. Enter the estimated hourly cost, per learner, of delivering the class. When you generate a training plan budget the system uses the cost entered here to determine the forecasted cost for a class based on the number of hours defined for each of the class's components on the Recommended Duration page.

Learning Period

You use these fields most often for classes with web-based, test, survey, or assignment learning components only. You can override the selections that you make in this group box at the class level.

Field or Control	***Description***
Learning Period	Enter the number of days after the enrollment date that learners must complete the class. If the learner has not received a completion status of either completed or not completed for a class, at the end of the learning period the Auto Mark Class Completion process runs. The system displays this value by default from the Learning Environment - Defaults page.
Warning Period Days	Enter the number of days before the end of the learning period that you want the system to send an email to notify the learner that the learning period is about to expire. The system also sends a warning based on the end date if it comes before the end of the learning period. This field triggers the PeopleSoft Application Engine process to send the Learning Period Expiration notification (LM_ACT_LRNPD).

Published Duration

Field or Control	*Description*
Days, Hours, and **Minutes**	Enter an estimate of how long classes should take. The values that you enter here become the default values on the Classes - Class Details page. Duration is not related to learning period. Duration is the amount of time the class should actually take to complete, whereas the learning period is the amount of time the learner has to complete the class. Most often the learning period will be longer than the duration.

Enrollment

Field or Control	*Description*
Max Enrollment (maximum enrollment)	Enter the maximum number of learners that can enroll in the class. You can override this number at the class level.
Min Enrollment (minimum enrollment)	Enter the minimum number of learners that should enroll in the class for the class to be held. If this minimum number is not met before a pre-defined number of days before the start of the class, then the Minimum Enrollment Met Alert notification is sent to the class administrator to inform him or her. You can override this number at the class level.
Average Fill Rate	Enter the average number of learners who enroll in the class each time the class is offered. This field is informational only.
Enforce Enrollment Limit	Select to have the system prevent learners from enrolling in this class after the maximum enrollment number is reached. To have the system generate a waiting list for this class, you must select this check box. You can override this option at the class level.

Waitlist

You can override the selections that you make in this group box at the class level.

Field or Control	***Description***
Enable Waitlist	Select to have the system accept wait-listed learners once maximum enrollment is reached. This value appears by default on the Learning Environment - Defaults page.
Waitlist Capacity	Enter the maximum number of learners that can be placed on the waiting list. If a learner attempts to enroll in a class that has a full waiting list, the system displays a message to indicate that the class is full.
Waitlist Threshold	Specify the maximum number of learners that can be waitlisted. The administrator for the primary learning environment will be notified if this value is exceeded.

Grades and Attendance

You can override the selections that you make in this group box at the class level.

Field or Control	***Description***
Auto Mark Completion	Select to have the system automatically mark attendance at the completion of the class. See Marking Attendance and Passing Statuses Automatically.
Mark Completion After	If you select **Auto Mark Attendance,** enter the number of days after the class end date that the system should mark attendance.
Launchable from History	Select if you want the links associated with web-based, test, or survey learning components to be launchable from the learner's My Learning page. If you select this check box, the learner will always be able to launch the URL content even after the class achieves a completion status of completed or not completed. The default value is inherited from the administrator's learning environment. **Note:** You must select this check box if you select **Allow Completion from History.**

Field or Control	*Description*
Allow Completion from History	Select if you want learners to be able to complete classes with web-based, test, or survey components from the My Learning page. For example, if a learner does not pass or complete a class the first time through he or she can return later to try to complete it from the My Learning page. If the **Launchable from History** check box is selected and this check box is cleared, then learners can launch the content from the My Learning page but their progress will not be updated and no changes will be made to the class's completion or passing status. The default value is inherited from the administrator's learning environment. **Note:** If you select this check box be sure to also select the **Launchable from History** check box.

Technical Requirements

Enter any technical requirements (such as plug-ins, a microphone, or a connection speed) for this class. The system does not display this information to learners.

Delivery Methods - Classes Page

Use the Delivery Methods - Classes page (LM_DM_ACTIVITY_PG) to view the list of classes that have been defined with the selected delivery methods and add new classes.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Delivery Methods** > **Classes**

This page lists all of the classes that you defined with this delivery method.

If the delivery method is already associated with a course, click the **Add New Class** button to access the Class component. The system automatically displays the name of the course and delivery method at the top of the Class - Class Details page.

Updating the Catalog Indexes

Page Used to Update the Catalog Index

Page Name	*Definition Name*	*Usage*
Build Search Index Page	PTSF_SCHEDULE_SI	Create and update the course and class, program, and objectives indexes for use in searches.

Related Links

Creating Courses

Understanding Programs

Understanding Objectives

Understanding the Catalog Index

Use the Rebuild Indexes component to run the processes that update the catalog index. Enterprise Learning Management uses the catalog index to perform searches in specific locations across the application. Searches reference the catalog index rather than the actual table that stores the data to enhance search performance. Therefore, you must update the catalog index whenever you do any of the following:

- Add new courses or classes to the catalog, or modify a course or class.

  To update the catalog index for courses and classes you must run the process using the LS_LM_ACT_CI search definition.

- Add a new curriculum or certification program or modify certain aspects of an existing one.

  To update the catalog index for curricula and certifications you must run the process using the LS_LM_PRG search definition.

- Add or modify an objective.

  To update the catalog index for objectives you must run the process using the LS_LM_OBJV search definition.

You can run these processes manually, or you can schedule them to run at predetermined intervals. Once you run these processes, users searching the catalog can see any changes you made. These three processes work independently of each other; you can run only one process or you can run them all at the same time.

The system uses a search against the catalog index only in the following locations:

Location	***Search On***
My Learning component, **Search Learning Catalog** group box **Employee Self-Service** > **Learning** > **My Learning**	• Classes • Courses • Programs
Search Catalog component (basic and advanced searches) This page is accessible to learners and managers through self-service.	• Classes • Courses • Programs
Add New Objectives This page is accessible to learners and managers through self-service.	Objectives

Location	***Search On***
Add Supplemental Learning component **<Role> Self-Service > Learning > Add Supplemental Learning**	• Courses • Programs • Objectives
Enroll Learners component **Enterprise Learning > Learner Tasks > Enroll Learners**	• Classes • Courses • Programs • Objectives

Related Links

Understanding PeopleSoft Search Definitions for ELM
Understanding PeopleSoft Search Framework Implementation for ELM
Using Global Search Definitions for ELM

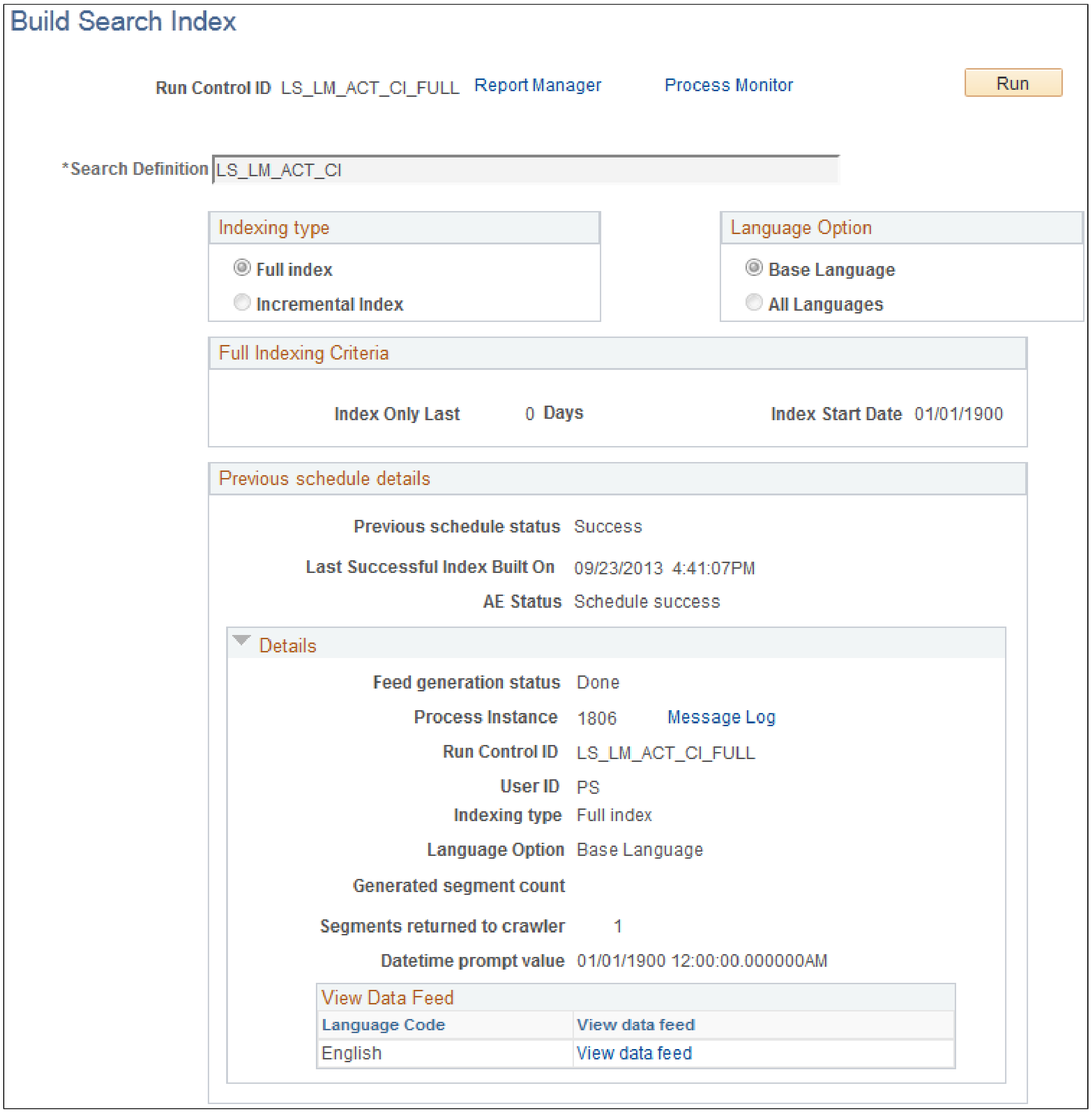
Build Search Index Page

Use the Build Search Index page (PTSF_SCHEDULE_SI) to create and update the course and class, program, and objectives indexes for use in searches.

Navigation:

Enterprise Learning > Catalog > Rebuild Indexes > Build Search Index

This example illustrates the fields and controls on the Build Search Index page.



Field or Control	*Description*
Search Definition	Select the search definition to determine the type of index you want to create or update. Values are: • *LS_LM_ACT_CI:* Select to create or update an index for classes and courses. • *LS_LM_PRG:* Select to create or update an index for programs. • *LS_LM_OBJV:* Select to create or update an index for objectives.
Full Index	Select to create a new full index. If an index already exists, the process overwrites it.

Field or Control	***Description***
Incremental Index	Select to update an existing index. The system updates an index with any changes made since the last time the index was successfully created or updated.
Base Language	Select to build or update the index for only the base language.
All Languages	Select to build or update the index for all enabled languages.

See the product documentation for *PeopleTools: Process Scheduler*.

Chapter 16

Managing Classes

Understanding Management of Classes

This topic lists prerequisites and discusses:

- Classes.
- Basic learning component types.
- Class templates.

Prerequisites

Before you can set up classes, you must:

- Define courses.

  See Creating Courses.

- Define equipment, materials, facilities and rooms, instructors, and session pattern templates (if applicable).

  See Understanding Learning Resource Management.

- (Optional) Define session pattern templates.

  See Patterns Page.

- Set up learning component types.

  See Setting Up Learning Component Types.

Management of Classes

A class is an instance of a course. Classes are comprised of learning components, which are characterized by how they deliver instructional content to learners. For instance, learning components can be instructor led and scheduled, or they can be web-based and self-paced. Learning components are the building blocks that comprise a class. Classes contain at least one learning component, but they could contain as many as needed to reach the learning objectives of the class. So, for example, a single class could be comprised of a web-based test, an in class session, and an online student evaluation survey. This flexibility enables you to mix instructor led and self-paced components as appropriate to optimally achieve the objectives of your training. Furthermore, you can create multiple classes for the same course using different combinations of components. This enables you to cater to the different learning styles, conditions, and needs of a diverse learner base.

To define a class:

1. Define class details, such as pricing, learning period, duration, enrollment limits, waitlist rules, and drop rules.

   See Defining Class Details.

2. Define the learning components that make up the class.

   See Understanding Web-Based, Test, and Survey Learning Components.

   See Understanding Sessions, Webcasts, and Assignments.

3. Define completion rules for the class.

   See Defining Learning Component Completion Rules.

4. (Optional) Add materials, attachments, and notes to the class.

   See Adding Attachments and Files to Classes.

5. (Optional) Calculate the estimated costs of the class.

   See Assigning Class Costs.

6. Activate the class on the Classes - Class Details page.

7. Run the Create Catalog Index process so that the new class appears when searching the learning catalog.

   See Updating the Catalog Indexes.

Every class has a delivery method, which you define at the course level. Delivery methods set defaults for new classes and ease the searching of the catalog by indicating to the learner the available classes (differentiated by delivery method) for a course. For example, you can offer the course "Communication Etiquette" two ways, through a self paced offering and through a scheduled offering. So depending on the learner's preference, he or she could choose the class that best suits his or her needs. You can define as many delivery method types as you like.

See Defining Delivery Method Types.

Classes cannot include curricula, items, or other classes. The system tracks the following information at the class level: fees, costs, continuing credit units, minimum and maximum number of learners, and waitlists. In addition, classes can have a learning period, such as learners must complete the class 30 days after they enroll. You cannot define a learning period for a learning component. However, you can define a duration for each learning component. Component duration is how long the component is expected to take a learner to complete, such as 1 hour for reading a chapter, or 4 hours for completing web-based content. Duration is informational only. You can also define duration for a class in addition to the class's learning period.

Tracking Progress

Learners can check progress towards the successful completion of a class by viewing the Class Progress pages. There they can view completion status, attendance status, passing status, scores, and grades.

Managers also use the Class Progress pages to track their team members' progress.

Administrators and instructors can view learner progress on the Class Roster and Component Roster pages.

Related Links

Understanding Attendance and Grading

Basic Learning Component Types

You can define as many learning component types as you want, but you must associate every learning component type with one of the six delivered *basic* learning component types: web-based, session, webcast, test, survey, or assignment. You associate the learning component types that you create with a basic learning component type so the system knows what information needs to be defined for the learning component and how to track learner progress in that component.

Related Links

Defining Delivery Method Types

Class Templates

Class templates may be used to quickly create new courses and classes, or classes from existing courses, or multiple items and classes in a single job.

See Defining Class Templates.

Defining Class Details

To define class details, use the Classes (LM_ACT) component.

Page Used to Define Class Details

Page Name	***Definition Name***	***Usage***
Maintain Classes - Class Details Page	LM_ACT	Define the class in terms of such things as minimum and maximum attendees, size of the waitlist, last enrollment date, drop dates and penalties for drops, and fees and reminders.
Perform Auto Enrollment Page	LM_REV_ENRLMT_RSLT	Choose whether to process automatic enrollment for planned or waitlisted learning.
Review Auto Enrollment Results Page	LM_REV_ENRLMT_RSLT	Review the results for automatic enrollment.

Page Name	***Definition Name***	***Usage***
Update Comments for Inactive Class Status Page	LM_ACT_STTS_CMTS	Enter comments explaining why you changed the status of the class to *Inactive.*

Understanding Class Details

When you create a class, you define details such as pricing, learning period, duration, enrollment limits, waitlist rules, drop rules, completion rules, attachments, and class costs. Some of this information comes by default from the class's corresponding course and delivery method at the same time the class is created.

You must associate classes with one or more learning environment and learner group. Learning environments and learner groups are security measures that limit access to classes (and courses) based on the learning environment and learner group with which the person is associated. If a learner is not associated with a learner group with which the class is associated, he or she cannot view or enroll in the class. You can only associate classes with learning environments and learner groups that are already associated with the classes' corresponding course.

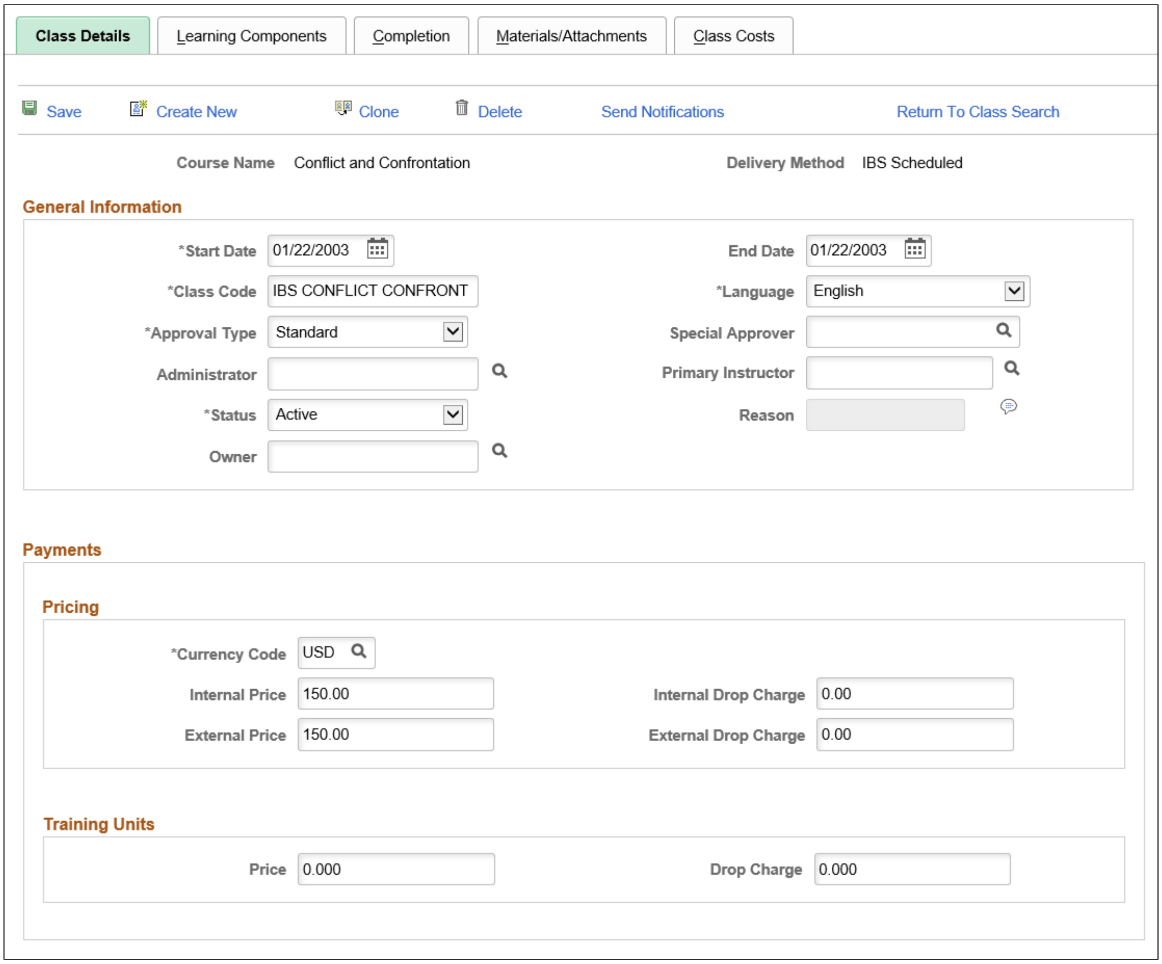
Maintain Classes - Class Details Page

Use the Maintain Classes - Class Details page (LM_ACT) to define the class in terms of such things as minimum and maximum attendees, size of the waitlist, last enrollment date, drop dates and penalties for drops, and fees and reminders.

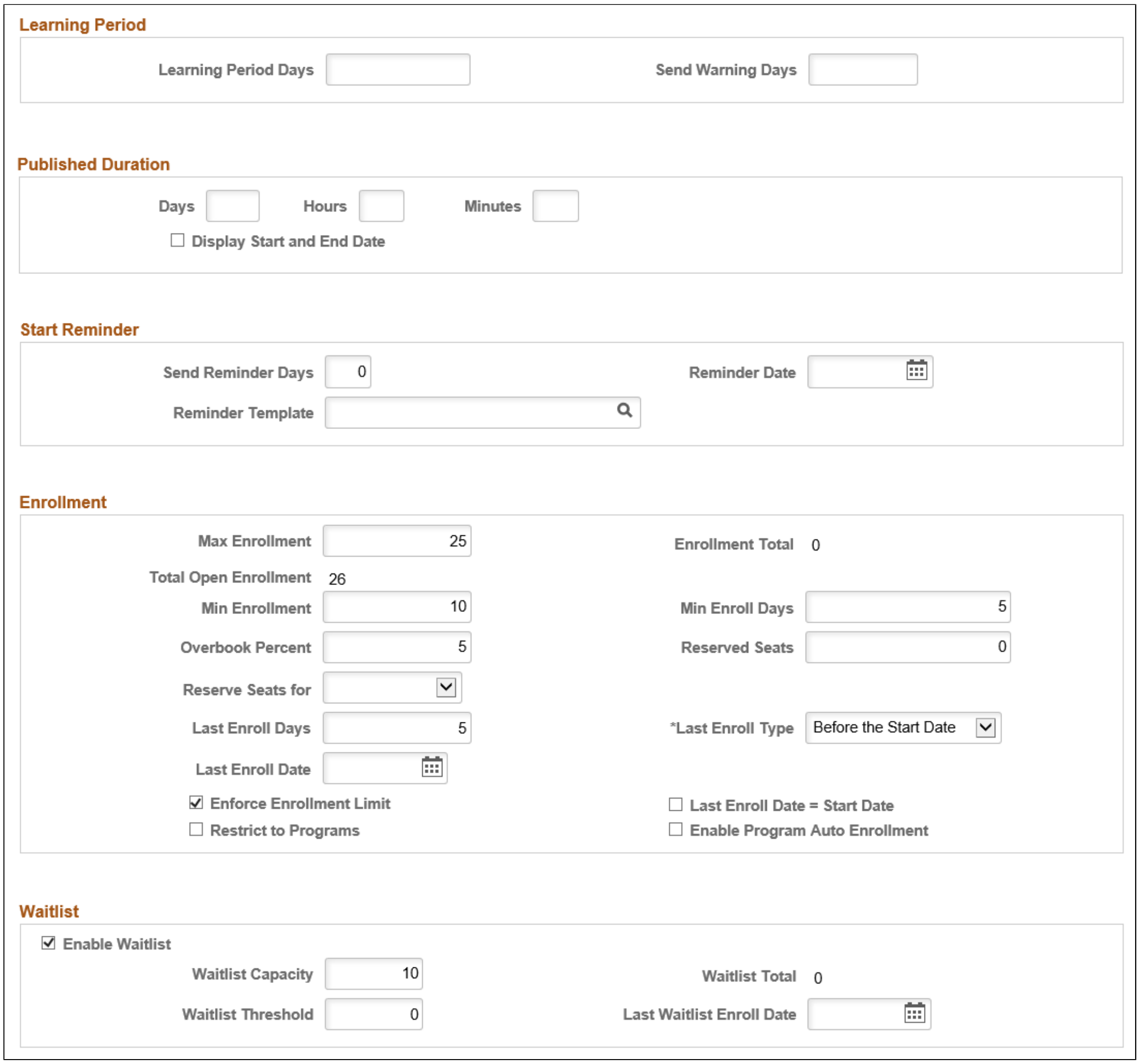
Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Class Details**

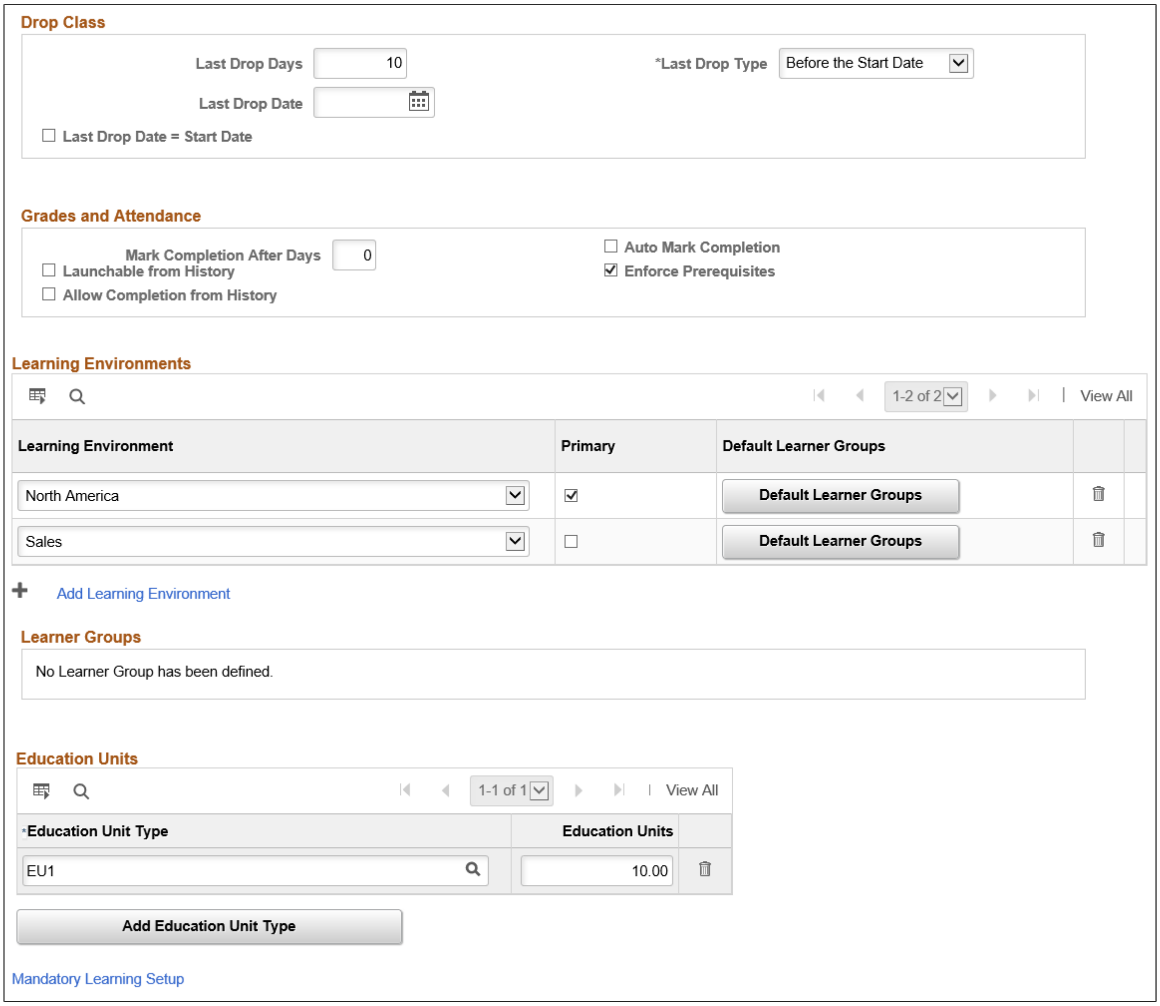
This example illustrates the fields and controls on the Maintain Classes - Class Details page (1 of 3).



This example illustrates the fields and controls on the Maintain Classes - Class Details page (2 of 3).



This example illustrates the fields and controls on the Maintain Classes - Class Details page (3 of 3).



Note: When you modify the **Class Code, Status, Start Date,** or **End Date** fields you must re-build the catalog index before the learning catalog reflects the changes. You must also re-build the catalog index if you add or delete learning environments or learner groups. You can run the Build Catalog Search Index (LM_VER_IDX) application engine process manually, or you can schedule it to run at predetermined intervals.

See Updating the Catalog Indexes.

General Information

Field or Control	*Description*
Class Code	The class code appears on the course catalog and during registration and is used by administrators, instructors, and learners to identify specific classes. The value that you enter must be unique if the Class Code Option on the Install Defaults - General page is set to Restricted. If that option is set to Restricted by LE, the value you enter must be unique to your learning environment. **Note:** If you enable automatic class code generation on the Install Defaults - Counter Records (LM_CNTR_SETUP_PG) page, the system creates a class code for new classes when you click **Save.** See Install Defaults – Counter Records Page.
Start Date	Enter the class's start date. This is the fist day learners can launch content from classes that contain web-based, survey, and test learning components. The system uses this date to determine when to send class reminders if you enter a value in the *Send Reminder* field. It also uses this value to determine when to send the minimum enrollment notification if you enter a value in the *Min Enroll Days* field, and it uses this value to determine the last date a learner can drop the class without incurring drop charges if you entered a value in the *Last Drop* field.

Field or Control	*Description*
End Date	Enter the class's end date. This is the last day learners can launch content from classes that contain web-based, survey, and test learning components. The end date is also the last date learners can enroll in the class, unless the last enrollment date set for the class comes first. In addition, the class end date triggers the Auto Mark Class Completion process if you selected the **Auto Mark Completion** check box. End date also triggers the Learning Period Expiration notification (LM_ACT_LRNPD) when the end date precedes the end of the learning period. **Note:** When you enter both a class end date and a learning period, the system uses the date that comes first to determine the end of the class. **Important!** (FRA) If you plan to generate the 2483 report with cost data that you export to the Administer Training business process in PeopleSoft HR, it is recommended that you set the end date of self-based classes to December 31 and clone the class for each subsequent year the class is offered. The end date ensures that the 2483 report includes only those costs that are attributable to the reporting year. See Understanding Cost Management.
Approval Type	If enrollment in the class requires approval, select the approval process definition here. The approval process definition defines the conditions under which enrollment must be approved and who must give their approval. The system populates this field by default from the Item Details page.
Special Approver	This field is applicable when you select a value in the **Approval Type** field. You can designate any Enterprise Learning Management user, who has either a Manager, Instructor or Administrator role, as a special approver for class enrollment. You can designate any Enterprise Learning Management user, who has either a Manager, Instructor or Administrator role, as a special approver for class enrollment. The approval process definition selected in the **Approval Type** field determines when the person named here is required to approve the enrollment. If the approval process does not require a special approver, the system ignores the name entered here.
Administrator	Enter or select the name of the enrollment administrator from the internal and external learners in your system.

Field or Control	*Description*
Primary Instructor	Enter the default instructor for any session learning components associated with the class. In addition, entering a primary instructor here can be useful for self-paced learning components (web-based, test, survey, assignment) that do not have instructors assigned at the learning component level. The system does not process any costs associated with instructors entered here. The system only uses instructors added to session templates, session patterns, or sessions to calculate costs for a class. The system populates this field by default from the Delivery Method page.
Status	Set the status of the class. The status of the class impacts enrollment in the class as described. Values are: *Active:* Class appears in the Learning Catalog and learners can self-enroll into the class. *Closed:* Classes that are closed appear in the learning catalog for learners in self-service but learners cannot self-enroll. Whenever a class is closed, only the learning administrators can enroll learners into that class. *Concluded:* Concluded classes do not appear in the learning catalog for learners to view or enroll in through self-service. Concluded classes are available to administrators and they can enroll learners into this class. An administrator must mark this status manually. *Inactive:* Classes that are inactive do not appear in the learning catalog for learners to view or enroll in through self-service. Whenever a class becomes inactive, LM_DROP_ENRS gets triggered, and all enrollments (except for those that are completed or incomplete) are automatically dropped. Also, an email notification is sent to all the learners, whose enrollments are dropped. When you select this status, the **Reason** field and **Inactive Status Comments** icon become available. *Pending:* This is the default for classes when they are first created. Classes with an enrollment status of pending can be viewed and managed by administrators but cannot be viewed or enrolled in by learners through self-service. **Note:** You cannot save classes with *Active, Closed,* or *Concluded* statuses that do not have any learning components.

Field or Control	***Description***
Reason	Enter the reason that you are setting the status of the class to *Inactive.* Values are: *Class Cancelled, Class Correction Needed, Class Removed,* and *Class Schedule Change.* These are delivered values. You can add, delete, or modify reasons on the Reason Code page. See Reason Codes Page. **Note:** The **Reason** field is available only if you select a value of *Inactive* in the **Status** field.
Inactive Status Comments	Click this icon to access the Update Comments for Inactive Class Status page where you can enter additional information about why you changed the class status to *Inactive.* **Note:** This icon is available only if you select a value of *Inactive* in the **Status** field.
Language	Indicate the language the class will be offered in.
Owner	The owner is the person who is notified when the minimum enrollment is not met for the class. By default, the system displays the name of the administrator who creates the class. The Owner field works in conjunction with the Min Enrollment field and the Min Enroll Days field. Workflow must be activated for the minimum enrollment notice to be sent.

Pricing

Field or Control	***Description***
Currency Code	Select the currency code that applies to the monetary amounts entered in this group box. The system populates this field by default from the Delivery Method page.
Internal Price	Enter the price you are charging internal learners to enroll in this class. Internal learners are learners that you track in your human resource database, such as employees, contractors, and workers. The system populates this field by default from the Delivery Method page.

Field or Control	Description
Internal Drop Charge	Enter the amount you want to charge internal learners for dropping this class after the drop period, as defined in the Drop Period group box.
External Price	Enter the price you are charging external learners to enroll in this class. External learners are those who you do not track in your human resource database, such as non employees. The system populates this field by default from the Delivery Method page.
External Drop Charge	Enter the amount you want to charge external learners for dropping this class after the drop period, as defined in the Drop Period group box. The system populates this field by default from the Delivery Method page.

Training Units

Field or Control	Description
Price	Enter the number of training units you want this class to be worth. If you selected training units as a payment option on the Learning Environments - Defaults page, external learners will see the value you enter here when registering for the course. The system populates this field by default from the Delivery Method page. **Note:** Training units only apply to external learners.
Drop Charge	Enter the number of training units you want learners to be charged after dropping the class after the drop period. The system populates this field by default from the Delivery Method page.

Learning Period

Field or Control	***Description***
Learning Period	Enter the number of days after the start date or enrollment date (whichever is greater) that learners have to complete the class. The end of a learning period triggers the Auto Mark Class Completion process, which sets the learner's learning component and class completion statuses to *Completed* or *Not Completed,* depending on whether the learner achieved the requirements for completion. The system populates this field by default from the Delivery Method page. Learning periods are particularly useful for classes that contain web-based, test, or survey learning components. **Note:** When you enter both a class end date and a learning period, the system uses the date that comes first to determine the end of the class.
Send Warning	Enter the number of days before the end of the learning period that you want the system to send an email notification to the learner expressing that the learning period is about to expire. The warning will also be sent based on the end date if it comes before the end of the learning period. This field triggers the PeopleSoft Application Engine process to send the Learning Period Expiration notification (LM_ACT_LRNPD)

Published Duration

Field or Control	***Description***
Days, Hours, and **Minutes**	Enter an estimate of how long the class should take. This should be the total of the durations of the learning components that make up this class, plus any other time you think it might take the learner to complete. The class duration you enter here appears on the Class Details and Class Progress pages. Learning component durations do not roll up to the class durations, so you must enter it manually if you want to provide a duration estimate to learners. Duration is not related to learning period. Duration is the amount of time the class should actually take to complete, whereas the learning period is the amount of time the learner has to complete the class. Most often the learning period will be longer than the duration. The system populates this field by default from the Delivery Method page.

Field or Control	*Description*
Display Start and End Date	Select if you want to display the class start and end date to learners. The default for this field is selected. Clear this field to display "- -" to learners in enrollment notifications and in the class header on the Class Details and Progress pages. Clear this field if displaying the start date would be confusing to learners, such as for a self-paced class in which the start date is often not applicable to learners.

Start Reminder

Field or Control	*Description*
Send Reminder	Enter the number of days from the class start date that you want an email sent to learners and instructors reminding them about the start of the class. Alternatively, you can specify a particular date for the reminder to be issued in the **Reminder Date** field. A scheduled PeopleSoft Application Engine process performs the class reminder notification. See Class Reminder.
Reminder Date	Enter the date on which you want an email sent to learners and instructors reminding them about the start of the class. Alternatively, you can enter in the **Send Reminder** field the number of days before the start date that you want the reminder sent. A scheduled PeopleSoft Application Engine process performs the class reminder notification.
Reminder Template	Select an email template from the templates that you have set up. You set these up in **PeopleTools** > **Workflow** > **Notifications** > **Generic Templates.** PeopleSoft delivers the following default reminder template: LM_ACT_RMNDR. See the product documentation for *PeopleTools: Workflow Technology*.

Enrollment

Field or Control	***Description***
Max Enrollment (maximum enrollment)	Enter the maximum number of learners you want to enroll in this class. When this number has been reached, the system closes the class to further enrollment unless overbooking is permitted, in which case the system continues to enroll learners up to the user-specified overbook percentage. If waitlisting is also permitted, learners become waitlisted when the overbook percentage is reached. The system populates this field by default from the Delivery Method page. The system uses the number that you enter here when calculating the per seat cost of the class if the maximum number of learners enroll. You must enter a maximum enrollment value in order to calculate per seat costs. See Assigning Class Costs. **Note:** If an administrator enrolls a waitlisted learner after the maximum enrollment number has been met, the system increments the maximum enrollment number by one. For example, if the maximum enrollment number is 10, the enrollment total is 10, the overbook percentage is zero, and the enrollment limit is enforced, the system increments the maximum enrollment number from 10 to 11 when the administrator uses the Maintain Enrollments component to enroll a waitlisted learner.
Enrollment Total	Displays the number of learners who have successfully enrolled in the class. The total reduces if enrollments are cancelled or postponed. The enrollment process keeps this field updated.
Total Open Enrollment	The system displays the total amount of seats that are currently available for open enrollment. The system derives this number by increasing the maximum enrollment number by the overbook percentage, then subtracting the number of reserved seats, and finally subtracting the number of learners already enrolled . So if maximum enrollment equals 25, overbook percentage equals 5%, reserved seats equals 10, and 5 learners have already enrolled, then 25 + 1 [25 x .05 = 1.25] – 5 – 10 = 11. The total open enrollment would equal 11.

Field or Control	*Description*
Min Enrollment (minimum enrollment)	Enter the minimum number of learners you want to be enrolled for this class to proceed. The system populates this field by default from the Delivery Method page. The system uses the number that you enter here when calculating the per seat cost of the class if only the minimum number of learners enroll. You must enter a minimum enrollment value in order to calculate per seat costs. The value you enter here also triggers the Minimum Enrollment Met Alert notification (LM_ACT_MINEN). See Minimum Enrollment Met Alert.
Min Enroll Days (minimum enrollment days)	Enter the number of days before the class start date that you want the minimum enrollment notification sent to the enrollment administrator and class owner to alert them that the minimum enrollment has not been reached. A scheduled PeopleSoft Application Engine process performs the Minimum Enrollment Met Alert notification (LM_ACT_MINEN). This notification gives the class administrator and owner the opportunity to cancel this class due to low enrollment. The system populates this field by default from the Learning Environments - Defaults page.
Overbook	Enter the percentage above the maximum enrollment value that you will allow enrollment. The overbook value, multiplied by the maximum enrollment number, is the total number of enrollments that the system accepts before the system assigns the waitlist status to a learner who tries to enroll in this class. The system populates this field by default from the Learning Environments - Defaults page.
Reserved Seats	Enter the number of seats you want available in reserve. Only training administrator can enroll learners into reserved seats. Use reserved seats to reserve seats for groups of learners without naming specific learners. For example, you could reserve seats for new hire orientation, where you have a large number of learners who will enroll but who are not yet in your system. You can revise the number of reserved seats at anytime.

Field or Control	*Description*
Reserve Seats For and Name	Enter a value in these fields if you want to reserve seats for a specific *Department* or *Organization*. Select the specific department or organization in the **Name** field that becomes available when you select a value in the **Reserve Seats For** field. The system reserves seats only for learners associated with the department or organization that you select.
Last Enroll Days and **Last Enroll Type**	Enter the number of days *Before the Start Date* or *After the Start Date* to indicate the last day enrollment is permitted. This is useful, for instance, when you want to close enrollment to accommodate the ordering of materials for the class. You can set days in this field or a specific date in the **Last Enroll Date** (last enrollment date) field. The system populates this field by default from the Learning Environments - Defaults page.
Last Enroll Date	Enter a date that represents the last day on which enrollment into this class is permitted. Alternatively, you can specify how many days before or after the class start date learners can enroll in the **Last Enroll Days** field or you can set the last enroll date at the class start date by selecting the **Last Enroll Date = Start Date** check box.
Last Enroll Date = Start Date	Select if you want the last day learners can enroll in this class to equal the class start date. Alternatively, you can enter a last enrollment date in the **Last Enroll Date** field, or you can specify how many days before or after the class start date learners can enroll in the **Last Enroll Days** field.
Enforce Enrollment Limit	Select to prevent learners from enrolling in this class when the maximum enrollment number plus the overbook percentage is reached. You must select this check box to have the system generate a waitlist for this class. Deselect the check box if there is no maximum enrollment limit. The system populates this field by default from the Delivery Method page.

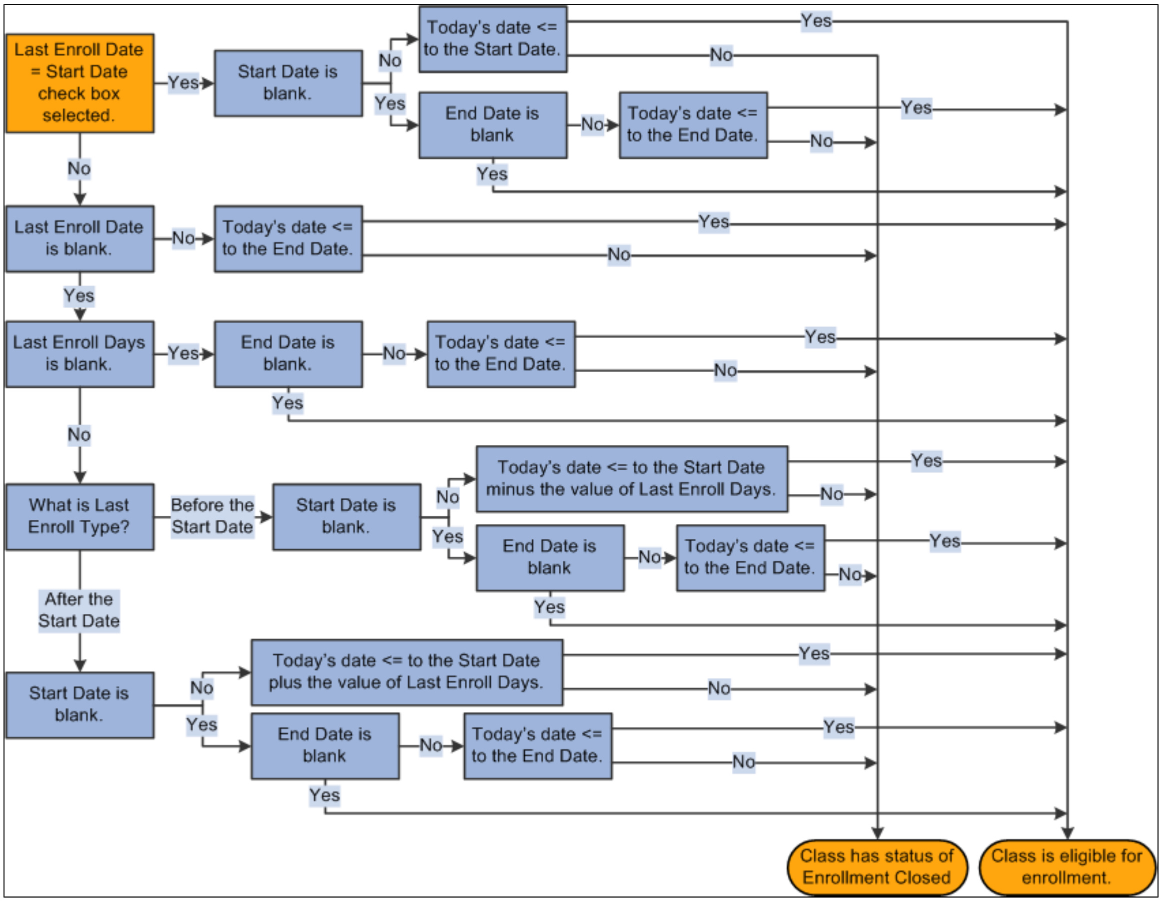
Field or Control	*Description*
Restrict to Programs	Select if you want this class to only be available to a learner who is enrolled in programs that require this class for completion. Administrators can enroll learners in classes that are restricted to programs by using the Enroll Learners component. See Enroll Learners - Search for Learning Page. See Understanding Programs. **Note:** If all the classes in a course are marked as 'restricted to programs', that course is not displayed in the fluid version of Find Learning.
Enable Program Auto Enrollment	Select to enable the system to automatically enroll learners in the class when they are registered for programs that include the class. By default, this field inherits its value from the delivery method of the class. For more information, see the documentation for the Delivery Method Type Page.

Determining Enrollment Eligibility for a Class

To determine whether a class is open or closed for enrollment, the system uses the values that you define for the **Start Date, End Date, Last Enroll Days, Last Enroll Type, Last Enroll Date,** and **Last Enroll Date = Start Date** fields on the Maintain Classes - .

Note: Only classes with a **Status** of *Active* are open for enrollment.

This diagram illustrates the business logic that the system uses to determine whether a class is eligible for enrollment or closed for enrollment.



Waitlist

Field or Control	*Description*
Enable Waitlist	Select if you want the system to accept waitlisted learners for this class when the maximum enrollment number has been reached. If overbooking is permitted, the system does not waitlist learners until the overbook percentage is reached. The system populates this field by default from the Delivery Method page.
Waitlist Capacity	Enter the maximum number of learners that the system can put on the waitlist. The system populates this field by default from the Delivery Method page.
Waitlist Total	Displays the number of learners on the waitlist. The enrollment process increases or decreases this number as learners are added to or removed from the waitlist.

Field or Control	*Description*
Waitlist Threshold	Enter the number of learners on the waitlist that will trigger a notification to the administrator.
Last Waitlist Enroll Date:	Enter the date after which the system no longer automatically enrolls waitlisted learners when an enrolled learner drops a class. If you leave this field blank, the system uses the class's **Start Date** as the last date for automatically enrolling waitlisted learners.

Drop Class

Field or Control	*Description*
Last Drop	Enter the number of days *Before the Start Date* or *After the Enrollment Date* that a learner can drop the class without paying the drop fee. Alternatively, you can enter a specific date in the **Last Drop Date** field. The system populates this field by default from the Learning Environments - Defaults page.
Last Drop Date	Enter the date until which a learner can drop the class without paying the drop fee.
Last Drop Date = Start Date	Select if you want the last day learners can drop this class without having to pay a drop fee to equal the class start date.

Grades and Attendance

Field or Control	*Description*
Auto Mark Completion (automatically mark completion)	Select to have the system automatically update completion statuses at the completion of a class. The rules for marking attendance depend upon the learning components within the class. The system populates this field by default from the Delivery Method page. See Marking Attendance and Passing Statuses Automatically.

Field or Control	*Description*
Launchable from History	Select if you want the links associated with web-based, test, or survey learning components to be launchable from the learner's My Learning page after the class achieves a completion status of *Completed* or *Not Completed.* The system populates this field by default from the Delivery Method page. **Note:** You must select this check box if you select **Allow Completion from History.**
Enforce Prerequisites	Select if you want the enrollment process to enforce required class prerequisites. If this check box is cleared, the classes' required prerequisites will not be enforced during enrollment. Even if this check box is selected, the learning administrator can still override prerequisites for individual learners during group and mass enrollment. Managers cannot override prerequisites for a learner directly, but can use the Supplemental Learning page to give learners waivers on courses, objectives, and programs. The system populates this field by default from the learning environments defaults or installation defaults. Define prerequisites on the Item Details - Prerequisites page.
Mark Completion After	If you selected the **Auto Mark Completion** check box, enter the number of days after completion of the class that the system is to automatically update the attendance and passing statuses. If the value is *0,* the system updates the attendance records on the completion date. The system populates this field by default from the Delivery Method page.
Allow Completion from History	Select if you want learners to be able to complete classes that have web-based, test, or survey learning components after the class achieves a completion status of Completed or Not Completed. For example, if a learner does not pass or complete a class the first time through he or she can return later to try to complete it. If the **Launchable from History** check box is selected and this check box is cleared, then learners can launch the content but their progress will not be updated and no changes will be made to the class's completion or passing status. **Note:** If you select this check box be sure to also select the **Launchable from History** check box.

Edu. Assessment Classification (educational assessment classification)

This group box appears only for classes of courses that are eligible for DIF. The information you enter in the fields of this group box are used to generate the Educational Assessment report for external learners.

Field or Control	***Description***
Provided By	Indicate by whom the training was provided. Values are: *Org as Subcontractor* (organization as subcontractor), *Organization, Subcontractor of Org* (subcontractor of organization).
General Objective	Enter the general objective of the class. Values are: *Guidance/ Support*, *Level I or II*, *Level III*, *Level IV*, *Level V*, *Other*, *Skills Assessment*, Training recog. by RNCP (training recognized by Le Répertoire National des Certifications Professionnelles)
Specialist Training	Enter any specialist training that applies to the class. You define the valid values for this field on the Specialist Training page. See Specialist Training Page.

Learning Environments

Field or Control	***Description***
Learning Environment	By default, the administrator's learning environment is listed here. You can associate other learning environments with this class provided the learning environments are also associated with the corresponding course. The learning environments selected here control which learner groups you can associate with the class.
Primary	Indicate the primary learning environment. See Understanding Learning Environments.

Field or Control	***Description***
Default Learner Groups	When you click this button, the system adds all learner groups that are associated with the class's course for this learning environment. For example, say that the course is associated with the North America learning environment and with two learner groups for North America. When you click the Default Learner Groups button on this page, the system automatically associates both learner groups with this class.

Learner Groups

A learner must be a member of a learner group that is listed here to access this class when searching the catalog. When you click the Default Learner Groups button, the system lists the defaulted learner groups. You can make access to the class more restrictive by removing learner groups or by combining learner groups, but you cannot add learner groups that are not already associated with the related course.

To further define learner group access, click the Edit Learner Group Security link. This causes additional fields to appear:

Field or Control	***Description***
Relationship	Specify how this learner group is related to others in the list when used to determine whether or not a person has access. Values are: *And:* A learner must be a member of both this learner group and the next in the list. *Or:* A learner must be in this learner group or the next in the list. *End:* A placeholder for the last learner group in the list. The system ignores any learner groups that are listed after *End.* To define security such that a learner must be a member of learner group A, and a member of learner group B or C, you must reuse learner group A. The resulting security would look like this: Learner group A *and* Learner group B *or* Learner group A *and* Learner group C *end.* **Important!** Associate a class with at least one learner group. If you do not select a learner group, learners cannot access this class.

Field or Control	***Description***
Clone Class	This button is enabled after you save a class. It enables you to clone and modify the class.
Delete Class	Click to delete the class. If the class has any enrollments, the button is hidden.

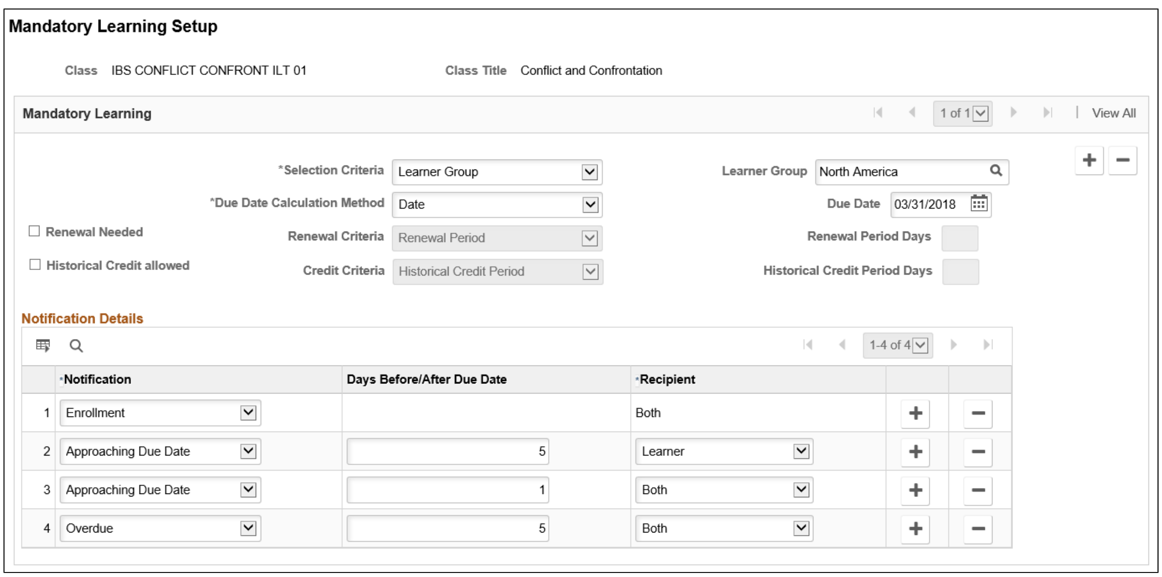
Education Units

Field or Control	***Description***
Education Unit group box	Use this group box to add, edit or delete Education Unit related information. Use the lookup icon to select the **Education Unit Type** and enter the number of units that you want accredited to the learner on completion of this class. For new classes, the system populates this field by default from the Course Detail page and this remains editable at the class level. Use the **Add Educational Unit Type** button to add a new row. You can add up to five new rows.

Mandatory Learning Setup

Select the **Mandatory Learning Setup**link to access the setup page.

This example illustrates the fields and controls on the Mandatory Learning Setup page.



Field or Control	***Description***
Selection Criteria	This is a required field. The Selection Criteria drop down has two values: Learner Group and Learner. The default value is Learner Group.
Learner Group or Learner	Select the Learner Group or Learner.

Field or Control	***Description***
Due Date Calculation Method	This is a required field. The Due Date Calculation Method has two drop down values: Learning Period and Date. The default value is Learning Period.
Learning Period Days	When you select the Due Date Calculation Method as Learning Period, the Learning Period Days field displays. Here you can enter the number of Learning Period days.
Due Date	When you select the Due Date Calculation Method as Date, the Due Date field displays. Select this field to enter a due date of your choice.
Renewal Needed	This check box value is as set in the Learning Environment defaults.
Renewal Criteria	There are two renewal criteria options available: Renewal Period and Renewal Threshold Date.
Renewal Period Days	This field is displayed only when the Renewal Criteria is set to Renewal Period. The Renewal Period box displays the number of days as set in the Learning Environment defaults.
Renewal Threshold Date	This field is displayed only when the Renewal Criteria is set to Renewal Threshold Date. The Renewal Threshold Date field displays the date set in the Learning Environment defaults. The system checks if the classes are to be renewed, against this date. i.e. If the class was taken before the threshold date, then it requires renewal.
Historical Credit allowed	This check box value is as set in the Learning Environment defaults.
Credit Criteria	There are two Credit Criteria options available: Historical Credit Period and Credit Threshold Date.
Historical Credit Period Days	This field is displayed only when ‘Historical Credit Period’ is selected. The default value is as set in the Learning Environment defaults.

Field or Control	***Description***
Credit Threshold Date	This field is displayed only when 'Credit Threshold Date' is selected. The default value is as set in the Learning Environment. The system checks if the re-hired learner qualifies for historical credit, against this date. i.e. If the class was taken before the credit threshold date, then historical credit is granted.
Notification	The available values are: Enrollment, Approaching Due Date, and Overdue. **Note:** The same type of notification can occur more than once on the grid.
Days Before/After Due Date	Select the number of days before or after the due date to generate notifications.
Recipient	The available values are Learner, Manager and Both. **Note**: For Enrollment notification, the only drop-down value is Both and it is read only.

Notification Emails

When the Mandatory Enrollment process (LM_ML_ENROLL) runs, it stages data in the notification records which are then used to notify learners/managers/both about their enrollments. All learners, by default, are notified when they enroll into a class. Email notifications are also sent to alert them about the approaching due dates and when classes are overdue. Depending on the rules set, the process also sends out email notifications to managers about the enrollment of team members. All managers receive one email notification for every event (i.e. enrollment, approaching due date or overdue) during the enrollment period with an attachment of the consolidated list detailing the enrollment status of team members.

The LM_NOTIFY process can be run to send out notifications to both learners and managers about the enrollments in a Mandatory learning.

Note: The LM_NOTIFY process sends out notification emails to all enrolled learners, even when no 'Enrollment' notification is set in the Mandatory Learning Setup page.

The LM_ML_NOTIF process can be run to notify learners/managers/both about the approaching due dates and overdue enrollments.

The following delivered notification templates are used to define the content of the notifications that the system sends:

- LM_MAND_ENRL_CONF_ILT – Template used to send notification when learner is enrolled into a mandatory learning.
- LM_MAND_ENRL_CONF_MGR – Template used to send notification to manger when a direct report is enrolled into a mandatory learning.
- LM_ML_LRNR_APRCH_DUE_DT – Template used to send notification to learner when learner reaches approaching due date given in the mandatory learning setup.
- LM_MAND_ENRL_APRDUE_MGR – Template used to send notification to manger when learner reaches approaching due date given in the mandatory learning setup.
- LM_ML_LRNR_OVERDUE_DAYS – Template used to send notification to learner when learner has a mandatory learning which is overdue in days.
- LM_MAND_ENRL_OVRDUE_MGR – Template used to send notification to manager when learner has mandatory learning which is overdue in days.

Related Links

Cloning Classes

Perform Auto Enrollment Page

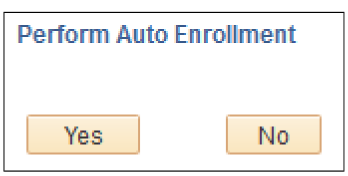
Use the Perform Auto Enrollment page (LM_REV_ENRLMT_RSLT) to choose whether to process automatic enrollment for planned or waitlisted learning.

Navigation:

Click Save on the Maintain Classes - Class Details page after changing the status of the class to Active.

Note: This page appears when you set the class status to Active and save. If no learners are eligible for automatic enrollment in the class, the system displays the message: *No Learners identified for auto enrollment*.

This example illustrates the fields and controls on the Perform Auto Enrollment page.



If scheduled enrollment is enabled for your system and setting the status of a class to *Active* satisfies one or more learners' waitlisted or planned learning, this page enables you to automatically enroll those learners in the newly activated class. Click Yes to perform automatic enrollment and view the results on the Review Auto Enrollment Results page.

Note: If the automatic enrollment includes a number of learners greater than the group enrollment maximum, the Group Enrollment - Warning Page appears enabling you to either schedule a mass enrollment, or cancel the enrollment. The Continue button is not available for automatic enrollment.

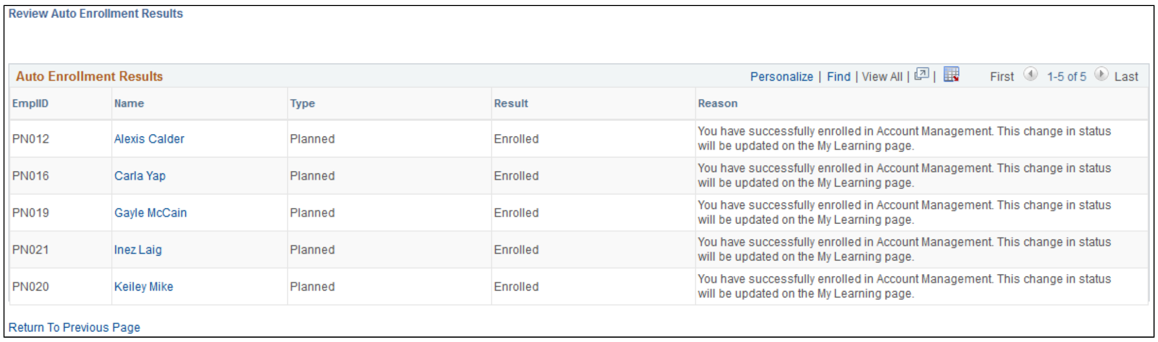
Review Auto Enrollment Results Page

Use the Review Auto Enrollment Results page (LM_REV_ENRLMT_RSLT) to review the results for automatic enrollment.

Navigation:

Click the **Yes** button on the Perform Auto Enrollment page.

This example illustrates the fields and controls on the Review Auto Enrollment Results page.



Adding Learning Components to Classes

This topic discusses how to add learning components that comprise the class.

Page Used to Add or Edit Learning Components

Page Name	***Definition Name***	***Usage***
Maintain Classes - Learning Components Page	LM_LC	Create or edit the learning components that comprise this class.

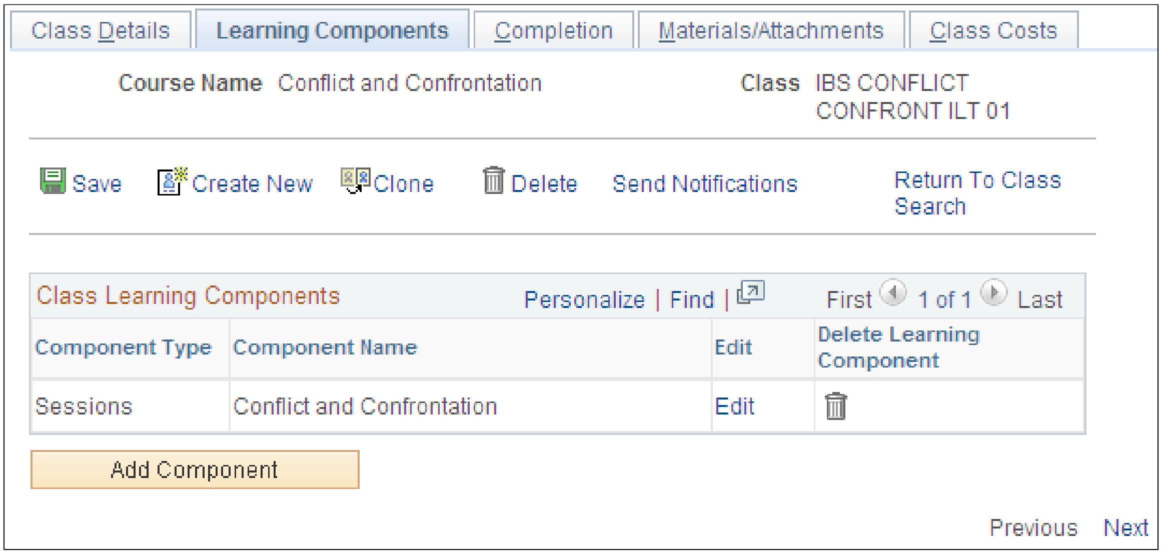
Maintain Classes - Learning Components Page

Use the Maintain Classes - Learning Components page (LM_LC) to create or edit the learning components that comprise this class.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Learning Components**

This example illustrates the fields and controls on the Classes - Learning Components page.



Click **Add Component** to add a learning component to this class. Click **Edit** to edit a learning component. You must add at least one learning component to every class.

Related Links

Understanding Web-Based, Test, and Survey Learning Components

Defining Learning Component Completion Rules

Pages Used to Define Learning Component Completion Rules

Page Name	***Definition Name***	***Usage***
Maintain Classes - Completion Page	LM_LC_CMPL	Define passing and completion requirements for each learning component within the class.
Recommended Duration Page	LM_LC_DURATION	Enter the amount of time that you estimate the learning component will take to complete.

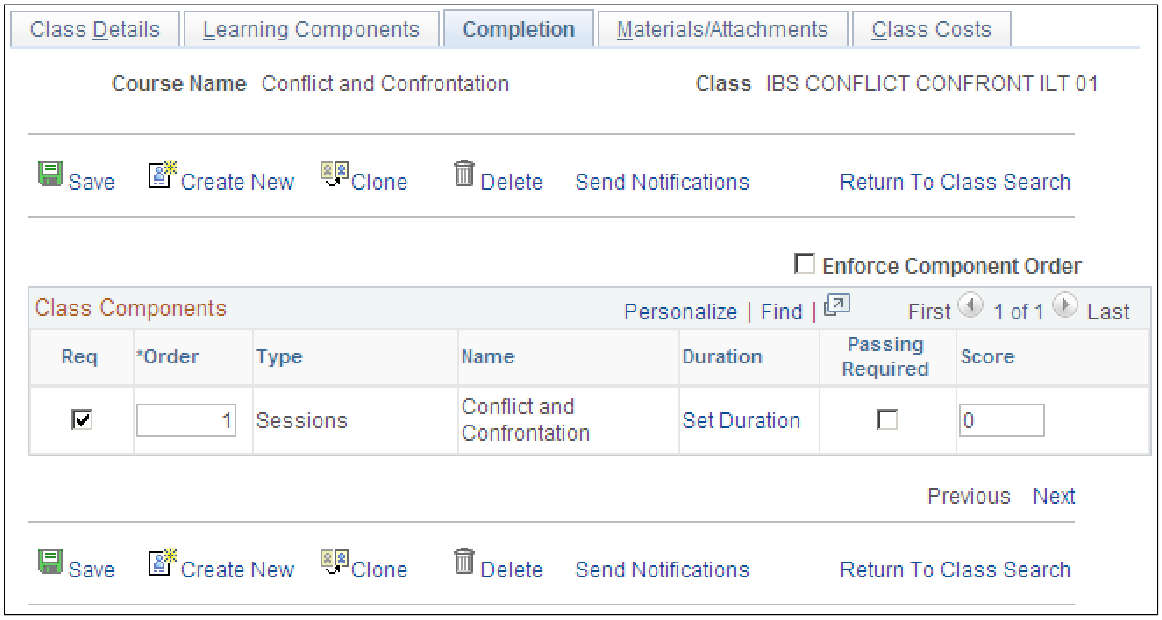
Maintain Classes - Completion Page

Use the Maintain Classes - Completion page (LM_LC_CMPL) to define passing and completion requirements for each learning component within the class.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Completion**

This example illustrates the fields and controls on the Classes - Completion page.



Field or Control	***Description***
Enforce Component Order	Select to force learners to complete learning components in order, as defined in the Order field. If this check box is cleared, the system does not prevent learners from starting and completing learning components out of order. The learning components still appear to learners in the order you establish, but the order is not enforced. By default this field is cleared.
Required	Select if you want a learner to be required to complete this learning component to complete the class. If you do not select this check box this learning component is optional for the learner. The system selects this check box by default. There is an exception when a learner does not need to complete and pass a required learning component. If this class contains a learning component type of test, and you select the Test Out option, then learners can complete the class by completing and passing the test out, even if there are other required learning components. **Note:** Select **Required** for all webcast learning components. When a webcast learning component is not required, the completion engine updates the learner's completion status to completed for the learning component as soon as he or she launches the webcast. If the learner were to leave the webcast before completing it the link from which the learner launches the webcast disappears since the system considers it completed. To avoid this situation, always select this check box for webcast learning components.

Field or Control	***Description***
Order	Enter the numerical order in which you want the system to list the learning components to the learner on the Class Progress page. If you selected the **Enforce Component Order** check box, the system would force the learner to complete the learning components in the order you establish here. If the components were web-based, only the learner's current learning component is available to launch at that time. When the learner completed one learning component, the next learning component in order becomes available.
Set Duration	Click the **Set Duration** link to access the Recommended Duration page, where you enter the amount of time that you estimate the learning component will take to complete.
Passing Required	Select to require that in order to successfully complete a learning component learners must receive a passing status of pass for this learning component. The passing status for a component is set automatically by the system comparing the learner's score passed back from the web-based content to the minimum passing score set for the component. If grades are mapped to passing status, you can also affect a learner's passing status by entering a grade. Learners' scores are automatically tracked for Aircraft Industry Computer Based Training Committee (AICC) or Sharable Content Object Reference Model (SCORM) content and for webcasts. If the Passing Required check box is cleared, then the learner does not need to pass the component in order to successfully complete that component.
Score	Enter the minimum score a learner must achieve on this learning component to receive a passing status of pass. The system uses this score to determine if a learner passed the learning component by comparing the score that you enter here to the scores retrieved from AICC and SCORM compliant content, or from third-party webcast vendors. The Auto Mark Class Completion process retrieves scores from third-party webcast vendors. For more information on scoring for SCORM and AICC compliant content, see Understanding Scoring for Compliant Content.
Send Class Notifications	Click to send ad hoc class notifications by email. See Ad hoc Notification Page.

Related Links

Understanding Attendance and Grading

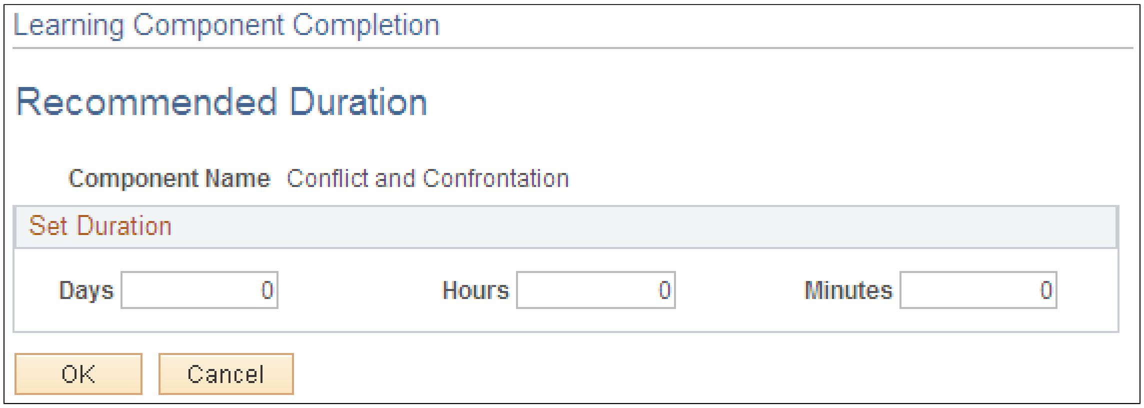
Recommended Duration Page

Use the Recommended Duration page (LM_LC_DURATION) to enter the amount of time that you estimate the learning component will take to complete.

Navigation:

Click the **Set Duration** link on the Maintain Classes - Completion page. If completion has already been set, the link displays the defined duration.

This example illustrates the fields and controls on the Recommended Duration page.



Enter the estimated amount of time it should take learners to complete this component. The values entered here appear for the component on the Class Details and Class Progress pages. When you generate training plans the system uses the value in the Hours field to estimate the training costs associated with the plan.

The published duration defined for a class on the Class - Details page is not derived from the component durations that you define here. Therefore, you can define a published duration for the class that differs from the sum of the component durations. For example, a learning component duration could be set to 30 minutes, but the class duration could be set to two weeks.

(FRA) If French features are enabled for the administrator's learning environment, the system converts the values that you enter here to the default value that is displayed for the component duration on the Hours tab of the Learner Roster page. The system converts days and minutes into hours, treating one day as equal to 8 hours.

Related Links

Understanding Training Plans

Understanding Regulatory Requirements for France

Adding Attachments and Files to Classes

Pages Used to Add Attachments and Files to Classes

Page Name	***Definition Name***	***Usage***
Maintain Classes - Materials/ Attachments Page	LM_ACT_MTRL	Specify previously defined materials to be used during the classes. You can also attach relevant non defined material.

Understanding Attachments

Attachments are any files that you provide learners and instructors through the class, such as textbook materials, handouts, or a syllabus. You find file attachment functionality throughout Enterprise Learning Management. File attachments can either be stored in a database table or on a specific file transfer protocol (FTP) server directory. You can change the default storage location by modifying various uniform resource locator (URL) definitions.

Related Links

Attachment Location Uniform Resource Locators (URLs)

Maintain Classes - Materials/Attachments Page

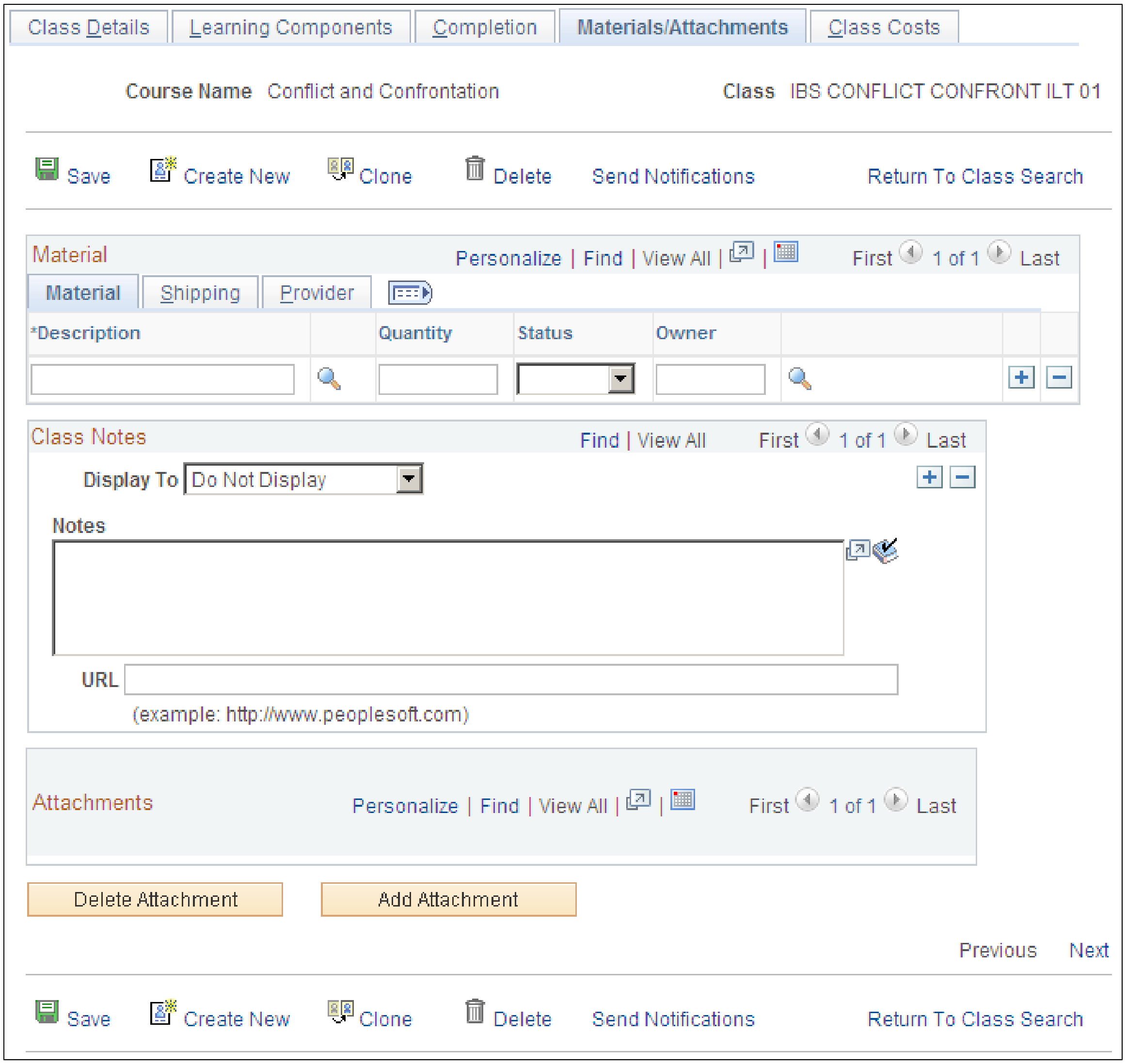
Use the Maintain Classes - Materials/Attachments page (LM_ACT_MTRL) to specify previously defined materials to be used during the classes.

You can also attach relevant non defined material.

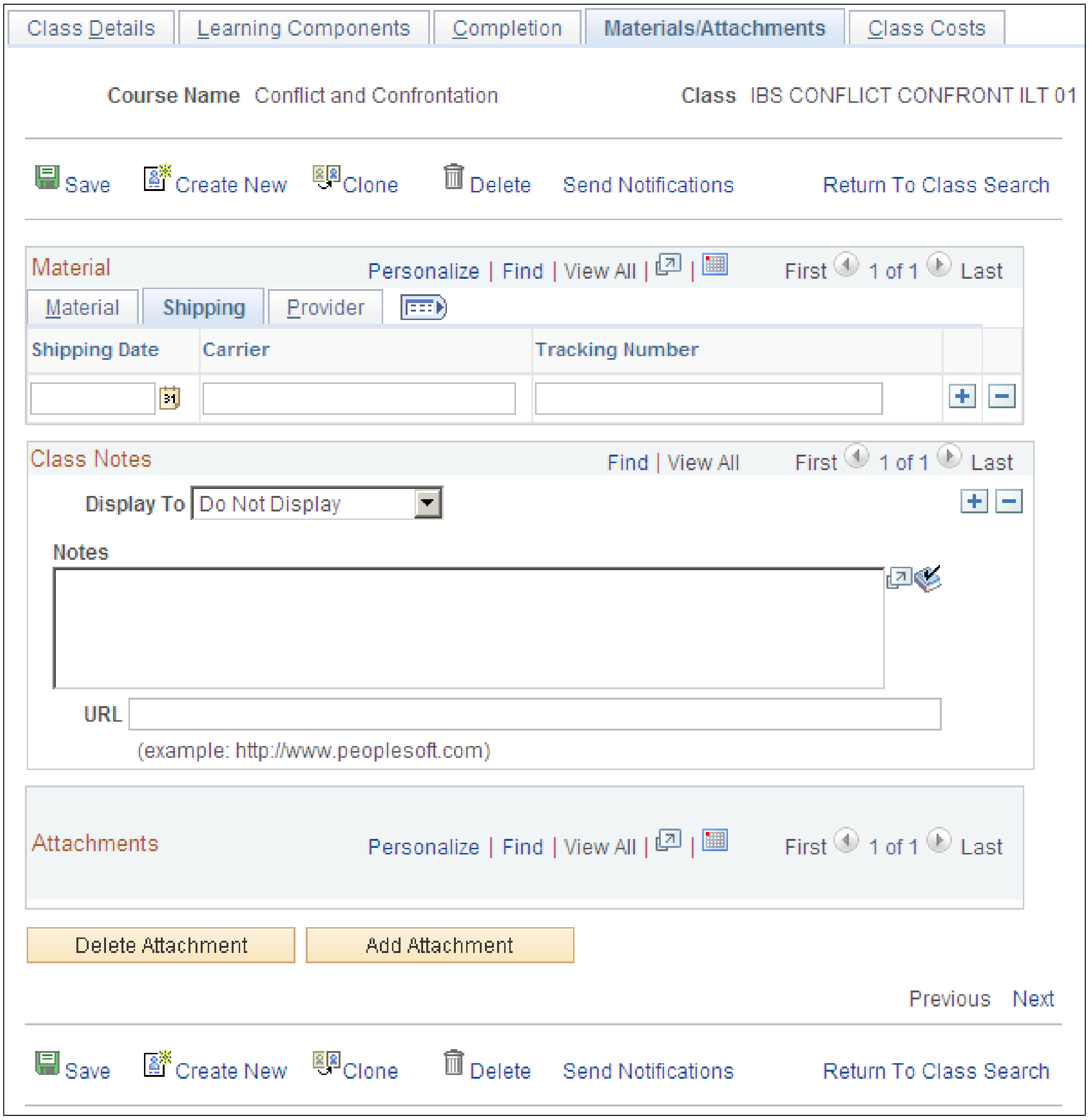
Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Materials/Attachments**

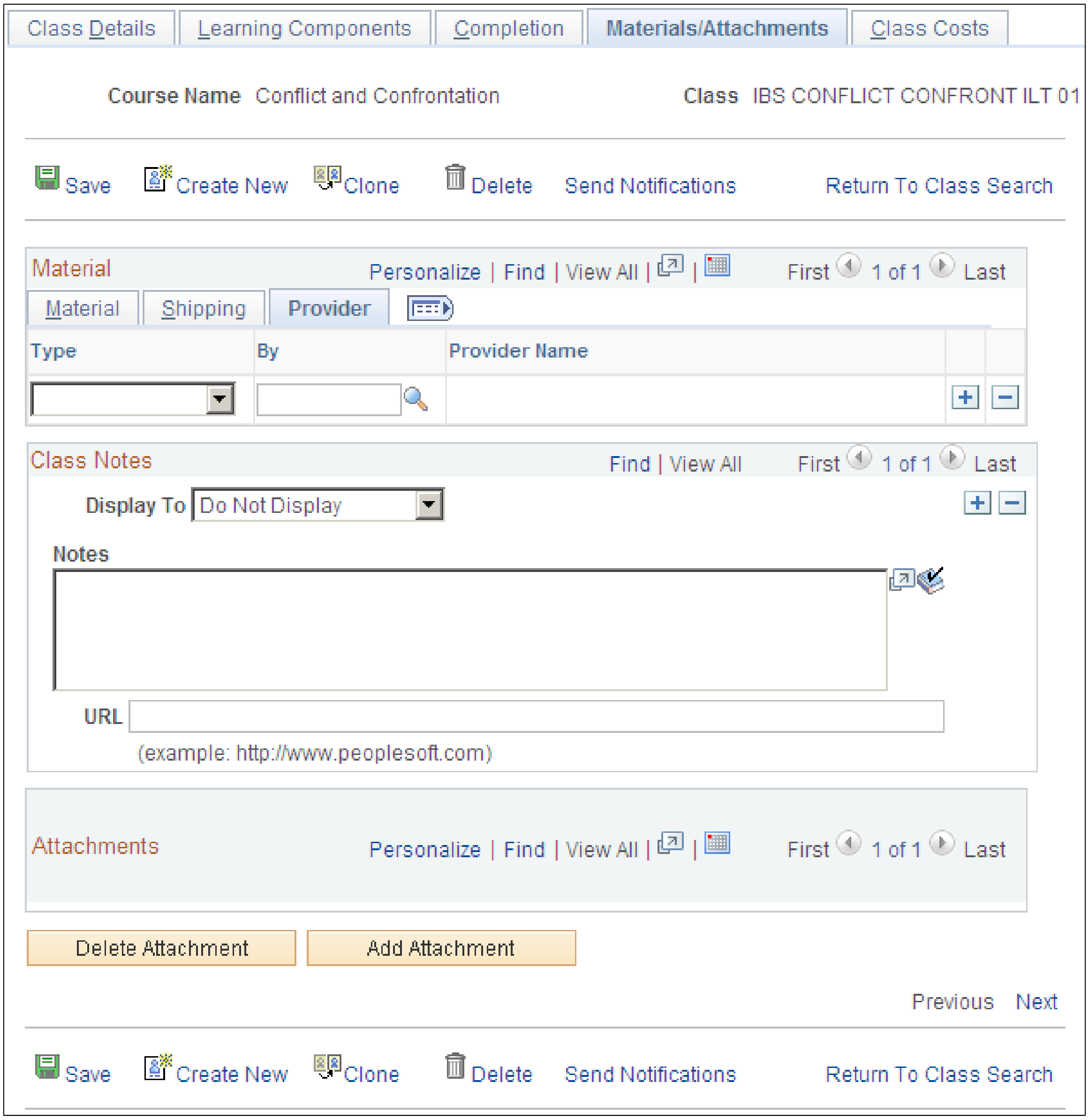
This example illustrates the fields and controls on the Maintain Classes - Materials/Attachments page: Material tab.



This example illustrates the fields and controls on the Maintain Classes - Materials/Attachments page: Shipping tab.



This example illustrates the fields and controls on the Maintain Classes - Materials/Attachments page: Provider tab.



Material Tab

Select materials from those that you have set up, specify the quantity, and set the status to *Progress* or *Shipped.* You can also specify who the owner of the material is.

Select *Progress* when you are in the process of assembling the materials, or when you have placed an order with a supplier for the materials and are still waiting to receive them. Update to *Shipped* when the supplier or carrier advises you that the order has been dispatched and provides you with shipping details, some of which—such as tracking number—you can add to the Shipping page.

Shipping Tab

For materials that you must have shipped to you, you can enter the shipping date, the carrier—enter text in this field because it contains no stored values—and the shipper's, or carrier's, tracking number.

Provider Tab

Specify the *Department* or *Vendor* who provided the materials for the class.

Class Notes

Use this group box to enter notes that you want to appear to the learners on the Class Details and Class Progress pages. If the note is too long to appear on the page, learners can click a link to see the whole note.

Field or Control	***Description***
Display To	Specify to whom the system displays the class note. Values are: *All Learners, Do Not Display,* and *Enrolled Learners.*
Notes	Enter any notes you want to display for this class.
URL	Enter a URL that you want the system to display for this class. **Note:** The URL displays for this note only if you enter text in the Notes field.

Assigning Class Costs

Pages Used to Assign Class Costs

Page Name	***Definition Name***	***Usage***
Maintain Classes - Class Costs Page	LM_ACT_COST	Specify class costs by cost ID.
(FRA) Classes - Financing Organization Page	LM_ACT_FINCOST_SEC	Select the financing organization that is funding a class cost and specify the amount funded.

Understanding Class Costing

Use class costing to estimate the cost of a class. The system automatically calculates the costs of some resources, but you can also manually add and edit class costs.

The system calculates and reports the costs of:

- All instructors who are attached to all sessions of the class.
- All equipment that is attached to all sessions of the class.

- All rooms that are attached to all sessions of the class.
- All materials that are attached to the class.
- The content for the class, which comes from the cost field of the associated delivery method.
- The vendor product cost defined for the class's course.

If you attach a piece of equipment to a room, the cost of that item is not automatically calculated. If you want to cost the item to the class, then depending on your specific requirements, you can:

- Add the equipment cost to the room cost.
- Add a cost line manually to the Class Costs page.

After total costs are calculated, the system calculates the minimum and maximum enrollment costs and the cost per seat for the minimum and the maximum number of learners enrolled.

Cost Type

If you enter a cost when defining equipment, instructors, or rooms, you must specify the cost type. The cost type represents the unit of measure the cost represents and affects how the system calculates class costs. The following table describes how the system handles each cost type:

Cost Type	***How Costs are Calculated***
Hour	The system calculates the number of hours that the item has been used by adding together the difference in hours between the start and end times for each session. This becomes the cost quantity, and the total cost is item (or unit) cost multiplied by quantity. The system rounds hours up to the nearest whole hour.
Day	Each session counts as a day. If your usage—that is, your session duration—within a whole day is short, you should consider changing to an hour cost type. Sometimes you may have multiple sessions in a day, such as a morning session in one room and an afternoon session in another room. If the sessions have the same instructor and the instructor is costed by the day, the day cost applies only once.
Week	The total number of days of the class (irrespective of the total number of sessions in those days) is divided by a standard working week number of days—5. The system rounds up partial weeks. Again, you have the option of using a smaller unit cost type if it suits your costing procedures better.

Cost Type	***How Costs are Calculated***
Fixed	The only calculation is to multiply by quantity, which is always one for equipment, instructors, and rooms. Materials are always a fixed cost, but when you attach them to a class, you enter the quantity. If the delivery method or vendor product has a cost, it is always a fixed cost, and the quantity is automatically one.
Student	The system multiplies the cost by the number of students that you enter on the Details tab on the Class Costs page.

Note: You can override the quantity for a cost type of Hour, Day, Week, or Student on the Class Costs page; you cannot override the quantity for a fixed cost on this page.

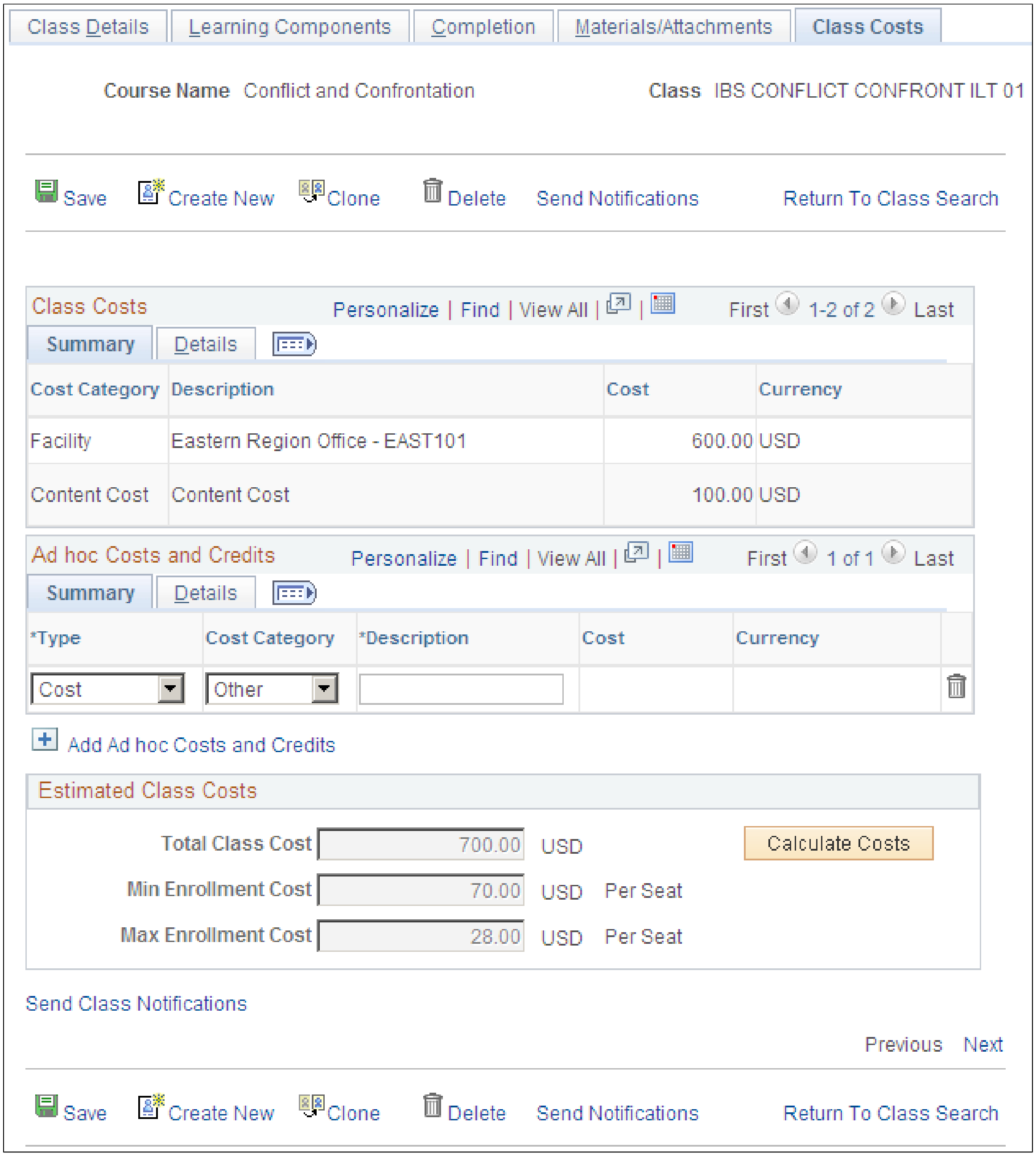
Maintain Classes - Class Costs Page

Use the Maintain Classes - Class Costs page (LM_ACT_COST) to specify class costs by cost ID.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Class Costs**

This example illustrates the fields and controls on the Maintain Classes - Class Costs page.



Note: The Cross Charge tabs appear only when the current administrator's learning environment is enabled for French features.

Class Costs

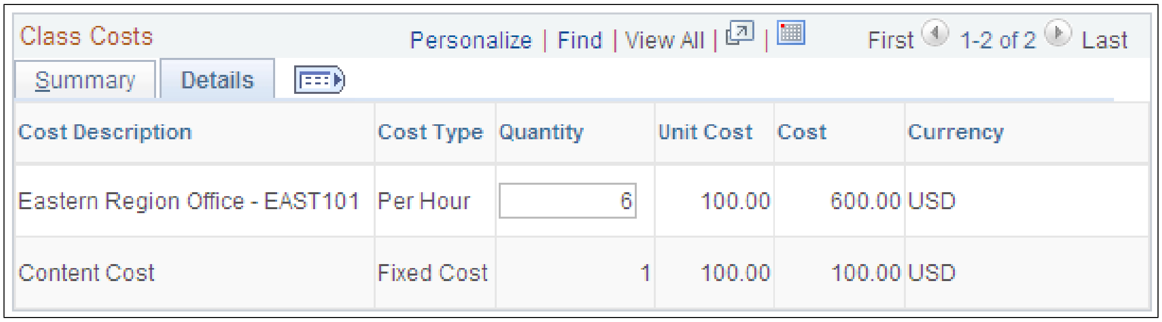
The Class Costs group box displays system-calculated costs.

Field or Control	***Description***
Cost Category and Description	Indicates what the cost is for. Categories include content, equipment, facility, instructor, material, and vendor—anything that has a cost associated with it. A cost category of content always has a description of *Content Cost,* which is the cost of the delivery method that is used for the class. The room cost category is *Facility.* The cost category for equipment items that come from sessions is *Equipment.* Equipment that is attached to a room does not appear as a system-calculated cost. The description of the vendor cost is the name of the vendor product that is associated with the course.
Cost	This is the overall cost. When the category is Equipment, Facility, or Instructor, it can be a fixed cost where the number of sessions has no effect, or a unit cost multiplied by the quantity. The quantity represents the number of times used (or booked for a session), based on the cost type of hour, day, week, or number of students. You can update the quantity on the Details tab. When the cost category is Material, the cost is the unit cost, which is automatically the fixed cost type, multiplied by the quantity, where quantity is the number of items that you specified when you assigned the material to the class on the Materials and Attachments page. You can override the quantity on the Details tab. When the category is Vendor, the cost is the value entered in the Cost field on the Vendor Products page, which is automatically the fixed cost type, multiplied by a quantity of one. When the category is Content, the cost is the value defined in the Cost field of the Delivery Method page, which is automatically the fixed cost type, multiplied by a quantity of one.

Class Costs: Details

Select the Class Costs: Details tab.

This example illustrates the fields and controls on the Class Costs: Details tab.



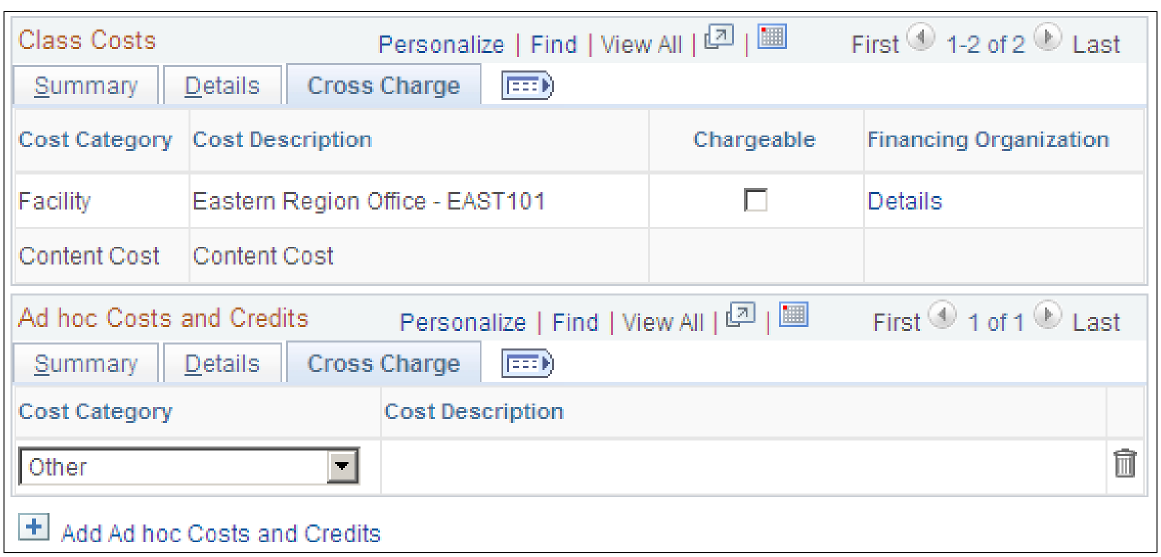
Click the Details tab in the Class Costs grid.

Field or Control	***Description***
Cost Type	Indicates the cost frequency: *Day, Fixed, Hour, Student,* or *Week.*
Quantity	The quantity is multiplied by the unit cost to yield the total cost. You can enter a value in this field for all cost types except Content and Vendor, which have a fixed quantity of 1. When the cost type is student, no default value appears. You must enter a quantity so that the system can calculate the total cost.

(FRA) Class Costs: Cross Charge

Click the Cross Charge tab in the Class Costs grid.

This example illustrates the fields and controls on the Class Costs: Cross Charge tab.



The Cross Charge tabs are accessible only when French features are enabled for the administrator's learning environment.

Field or Control	*Description*
Chargeable	Select if any portion of this cost is chargeable for 2483 reporting purposes. **Note:** For equipment and vendors, you can designate only one cost as chargeable. When you publish learning costs to PeopleSoft HR: Administer Training, the system transmits only the chargeable cost. To transmit a facility or vendor cost, other than the system-calculated amount, it is recommended that you clear the Chargeable field for the system-generated cost and enter an ad hoc chargeable cost for the desired amount.
Details	Click to access the Financing Organization page where you can specify how much of the cost is being financed and select the financing organization.

Ad Hoc Costs and Credits

Use the Ad Hoc Costs and Credits grid to enter costs for items that are not included in the system-calculated costs.

You could, for example, add the cost of an item of equipment in the rooms that you are using, if you haven't built the cost of the item into the room cost. (The **Cost Category** for room cost appears as *Facility.)*

You can also enter credits to offset costs that are associated with a class.

Field or Control	*Description*
Type	Select *Cost* or *Credit.*

Field or Control	*Description*
Cost Category	Select the cost category: *Content, Equipment, Facility, Instr. Fee* (instructor fee), *Instructor, Material, Other,* or *Vendor.* Select *Instr. Fee* to enter expenses for an instructor's meals, lodging, and other items. Select *Instructor* to record salary-related costs. When you select *Vendor,* you must also select a vendor product. You can only select from products offered by the vendor that is associated with the class's course. For credits, the only valid cost type is *Other.* **Note:** (FRA) Costs that have a cost category of Other or Content are never published to Administer Training, therefore, they are not included in the 2483 report. To have the 2483 report include expenses for student travel and other costs that Enterprise Learning Management does not publish, enter them through the Administer Training business process.
Description	When you select Other or Content as the cost category, you can enter a description of the cost here.
Cost	The system displays the total cost based on the quantity and units on the Details tab.

Ad Hoc Costs and Credits: Details

Click the Details tab on the Ad Hoc Costs and Credits grid.

Field or Control	*Description*
Cost Type	Select the cost frequency: *Day, Fixed, Hour, Student,* or *Week.* If you select *Student,* the **Auto-Update Type** field becomes available.

Field or Control	***Description***
Auto-Update Option	Select whether you want the system to automatically derive the value of the **Quantity** field and how. This field is available only if you select *Student* in the **Cost Type** field. Values are: *No Auto-Update:* Allows you to manually enter a **Quantity** value. *Current Enrollment:* Derives the **Quantity** value from the **Enrollment Total** field on the Maintain Classes - Class Details page. *Maximum Enrollment:* Derives the **Quantity** value from the **Max Enrollment** (maximum enrollment) field on the Maintain Classes - Class Details page. *Minimum Enrollment:* Derives the **Quantity** value from the **Min Enrollment** (minimum enrollment) field on the Maintain Classes - Class Details page.
Quantity	For a cost type of *Fixed* the quantity is always 1. For all other cost types, enter the quantity.
Unit Cost	Enter the unit cost that corresponds to the unit type.
Cost	The system calculates the cost by multiplying the quantity by the unit cost.

Ad Hoc Costs and Credits: Cross Charge

Click the Cross Charge tab on the Ad Hoc Costs and Credits grid.

This tab is similar to the Cross Charge tab on the Class Costs grid.

Estimated Class Costs

When you click the Calculate Costs button, the system asks if you want to reload class costs. If you select Yes, the system resets the quantity fields for the system-calculated costs to the default values, ignoring any changes that you have made to these fields. If you select No, the system calculates the class costs based on any updates you have made to the Quantity fields for the system-calculated costs.

When you click the Calculate Costs button, this group box shows the sum of the costs from the other two grids. The **Min Enrollment Cost** (minimum enrollment cost) and **Max Enrollment Cost** (maximum enrollment cost) fields are overall costs divided by the minimum enrollment and the maximum enrollment numbers that you entered on the Classes - Class Details page. If minimum and maximum fields are blank, the system cannot calculate per seat costs.

When the system calculates the estimated costs for the class, it uses the currency defined for the class. It there are resources with other currencies, it first converts the resource costs to the class's currency (as specified in the Pricing group box on the Classes - Class Details page).

Related Links

Understanding Financial Integration

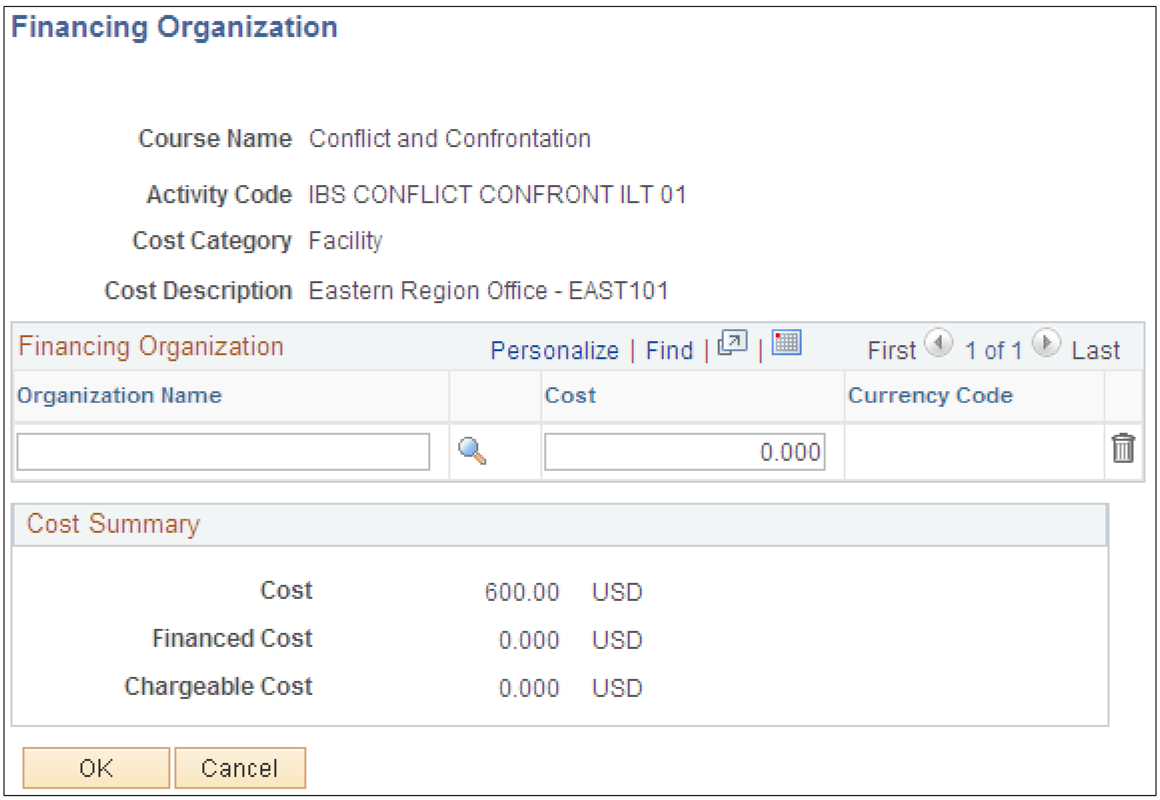
(FRA) Classes - Financing Organization Page

Use the Classes - Financing Organization page (LM_ACT_FINCOST_SEC) to select the financing organization that is funding a class cost and specify the amount funded.

Navigation:

Click **Details** on a Cross Charge tab on the Class Costs page.

This example illustrates the fields and controls on the Classes - Financing Organization page.



Select the financing organization that is funding all or part of the cost item and enter the amount financed. Use the Define Financing Organization (LM_FIN_ORG_MAIN) component to define financing organizations.

The Cost Summary group box displays the cost of the item as it appears on the Class Costs page and the financed amount that you entered on this page. If the Chargeable check box is selected on the Class Costs page, the system displays the Chargeable Cost, which represents the difference between the cost and the financed cost.

Related Links

(FRA) Defining Financing Organizations

Understanding Regulatory Requirements for France

Cloning Classes

Page Used to Clone a class

Page Name	*Definition Name*	*Usage*
Clone Class Page	LM_ACT_CLONE	Clone a class.

Understanding Class Cloning

Enterprise Learning Management enables administrators to clone and modify existing classes. The cloned class has the same attributes as the originating class with the exception of some attributes that must be different. For example, two classes can have the same class code and start and end dates, but you must define different session information—dates, rooms, instructors, or equipment—for each class.

For cloned classes, the system sets the Enrollment Total, Total Open Enrollment, and Waitlist Total field values to 0.

To clone a class:

1. Click the **Clone** link on any of the Classes pages for the class that you want to clone.
2. Modify originating class information and enter new class information on the Clone Class page.

   You can enter a new class code, start date, and end date, and you can select a class status. For a scheduled class, you can also choose whether to copy session information.

   Important! When you select the option to Copy the Class Session Information, the system copies the exact session information—dates, rooms, instructors, and equipment—as the originating class. Access the Sessions page for the new class after you clone it to ensure that there are no scheduling conflicts. Fix scheduling conflicts on the Session Conflicts page.

   If the originating class has webcast sessions, you must publish the webcast session content by using the Maintain Vendor Messages (LM_LELW_MSG_LOG) component. Publish the webcast session content after you update the session information.
3. Click Continue on the Clone Class page.

   The system clones the originating class and saves the new class. The Classes - Class Details page for the new class appears.
4. Modify class information as appropriate.

   If you selected for the system to copy session information, access the Sessions page to verify there are no scheduling conflicts and make changes on the Session Conflicts page as appropriate.

5. Save the new class.

Related Links

Creating Session Learning Components
Publishing Webcast Enrollment and Session Information to Vendors

Clone Class Page

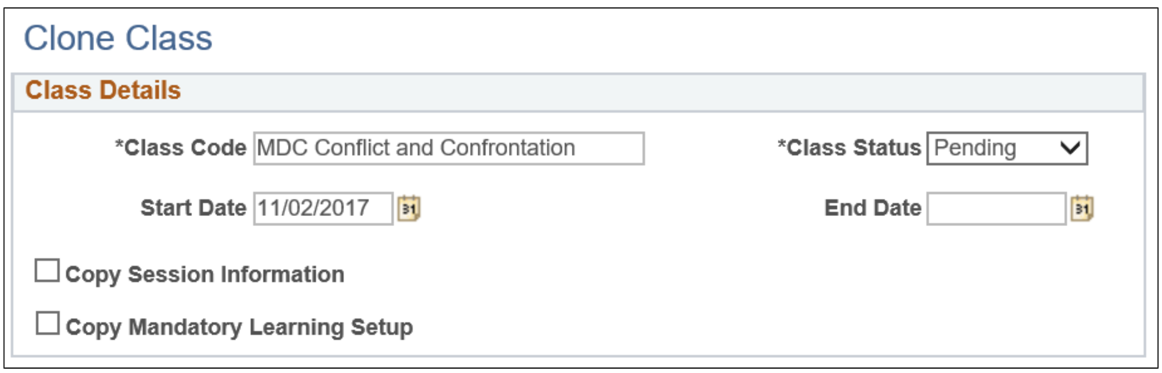
Use the Clone Class page (LM_ACT_CLONE) to clone a class.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Class Details**

Click the **Clone** link on any Classes page.

This example illustrates the fields and controls on the Clone Class page.



Field or Control	***Description***
Class Code	Enter a class code. The system populates this field by default from the originating class code.
Start Date and End Date	Enter start and end dates. The system populates the Start Date field with the current date.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Class Status</td><td>Set the status of the class. The status of the class effects enrollment in the class. Values are:
Active

Class appears in the learning catalog and learners can self-enroll into the class.
Closed

Classes that are closed appear in the learning catalog for learners in self-service, but learners cannot self-enroll. Whenever a class is closed, only the learning administrators can enroll learners into that class.
Concluded

Concluded classes do not appear in the learning catalog for learners to view or enroll in through self-service. Concluded classes are available to administrators and they can enroll learners into this class.
Inactive

Classes that are inactive do not appear in the learning catalog for learners to view or enroll in through self-service. Whenever a class becomes inactive, all enrollments (except for those that are completed or incomplete) are automatically dropped, and an email notification is sent to all the learners (whose enrollments are dropped).
Pending

This is the default for classes when they are first created. Pending classes can be viewed and managed by administrators but cannot be viewed or enrolled in by learners through self-service.</td></tr>
<tr><td>Copy the Class Session Information</td><td>Select to have the system copy the original class session information. This field appears only when sessions exist for the originating class.</td></tr>
<tr><td>Copy Mandatory Learning Setup</td><td>Select to have the system copy the mandatory learning setup. This field appears only when Mandatory Learning classes exist for the originating class.</td></tr>
</table>

Sending Class Notifications

Page Used to Send Class Notifications

Page Name	***Definition Name***	***Usage***
Class Notifications Page	LM_RUNCTL_ACT	Send class notifications.
Ad hoc Notification Page	LM_ACT_NOTIF	Send email messages about the class to instructors, learners, or other interested parties.

Understanding Class Notifications

When the Learning Period Expiration, Min Enrol Met Alert, and Class Reminder notifications are triggered the system stores the email notifications in a temporary table. Use the Class Notifications page to run processes that send these notifications to recipients all at once.

Use the Learning Period Expiration Application Engine process (LM_ACT_LRNPD) to send email notifications that alert learners that the learning period of a class in which the learners are enrolled is going to expire in a given number of days.

Use the Min Enrollment Notification Application Engine process (LM_ACT_MINEN) to send email notifications that alert the class administrator that the minimum enrollment has not been met for a class.

Use the Class Reminder Notification Application Engine process (LM_ACT_RMNDR) to send email notifications that remind class instructors and enrolled learners that the class is scheduled to start soon.

You can also send email notifications on the fly with the ad hoc Notifications page.

Note: You should schedule these process to run at least once daily.

Related Links

Class Workflow Notifications

Class Notifications Page

Use the Class Notifications page (LM_RUNCTL_ACT) to send class notifications.

Navigation:

Enterprise Learning > **Notifications** > **Class**

Enter the run control ID.

See the product documentation for *PeopleTools: Process Scheduler*.

Ad hoc Notification Page

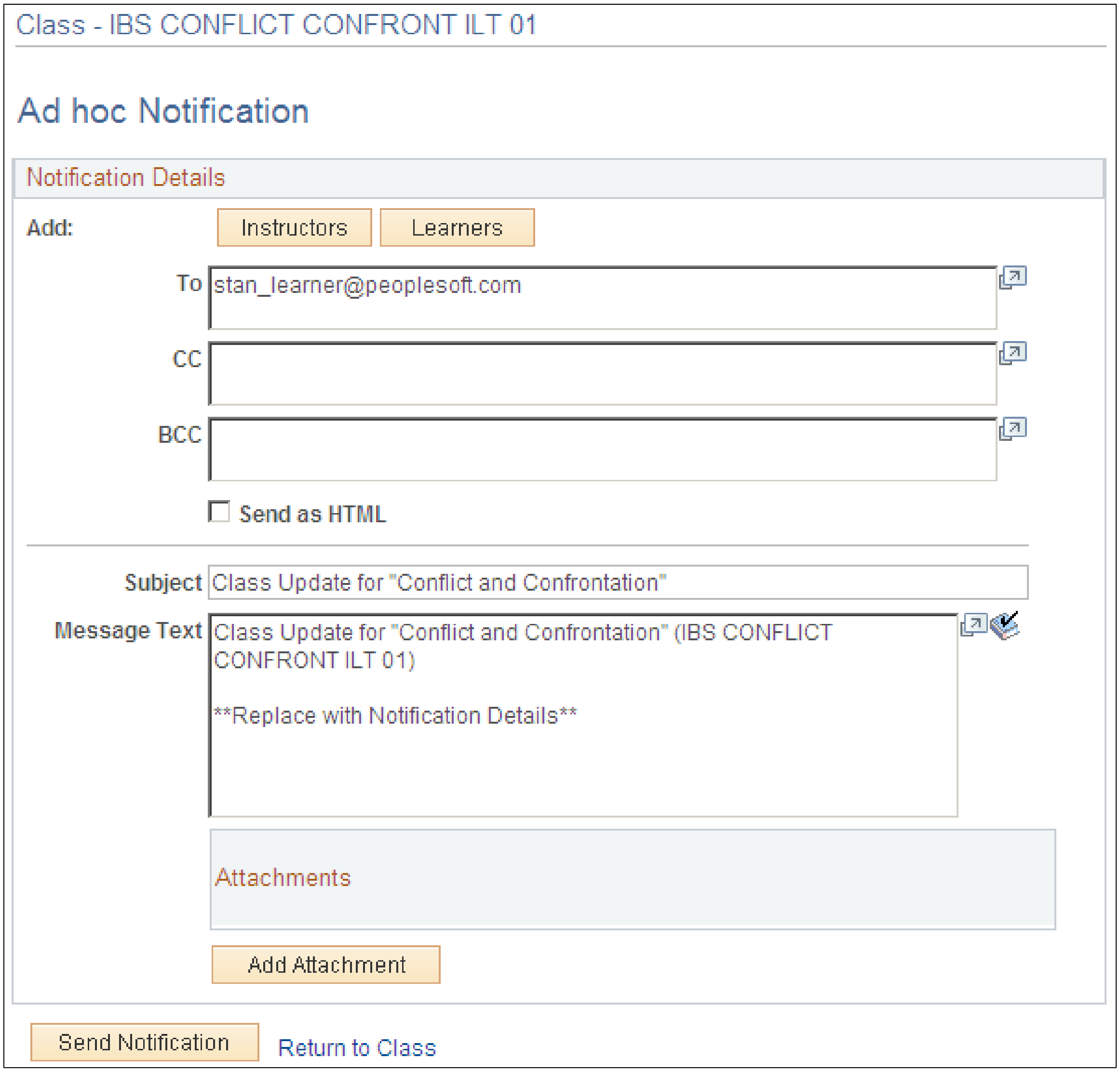
Use the Ad hoc Notification page (LM_ACT_NOTIF) to send email messages about the class to instructors, learners, or other interested parties.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Class Details**

Click the **Send Notifications** link on any page in the Maintain Classes component.

This example illustrates the fields and controls on the Ad hoc Notification page.



Field or Control	***Description***
Instructors and **Learners**	Click to populate the **To** field with the email addresses of the instructors and learners who are associated with this class.

Field or Control	***Description***
To, CC, and BCC	Enter the email addresses of the recipients to whom you want to send the ad hoc notification.
Send as HTML	Select to display the message in rich text HTML. This enables you to use standard HTML tags to format the text of your message.
Subject	Enter the subject text of the ad hoc notification email.
Message Text	Enter the message text of the ad hoc notification email.
Send Notification	Click to send the email message. A dialog box appears that enables you to confirm or cancel your email message.
Add Attachment	Click to attach a file to the ad hoc notification email. The Attachments group box displays the files that you add as attachments.

Chapter 17

Managing Web-Based, Test, Survey, and Podcast Learning Components

Understanding Web-Based, Test, and Survey Learning Components

This topic lists prerequisites and common elements and discusses:

- Web-based, test, and survey learning components.
- SCORM and AICC Compliance
- Passing status and compliant learning component lessons.

Prerequisites

Before you create compliant web-based, test, and survey learning components you must define configuration options that determine how your system works with compliant content.

Related Links

Defining Compliant Class Content Import Settings

Common Elements Used in the Topic

Field or Control	***Description***
Description	Enter a description of the learning component. The description appears to learners when they click the learning component link from the Class Progress page.
Provider Type	Specify whether the learning component is provided by a specific *Department* or *Vendor,* if applicable.
Provided By	Select the specific department or vendor that is providing the learning component.
Notes	For internal use only. Notes are informational.
Component Name	Enter the name of the learning component. The component name appears on the Classes Details page.

Field or Control	*Description*
Compliance	Select the body or standards method with which this learning component complies. Valid values are *AICC-API, AICC-HACP, None, SCORM11, SCORM12,* and *SCORM2004.* **Note:** The launch and track functionality within Enterprise Learning Management does not work unless a course is compliant with one of the standards. You can set up and launch noncompliant content but the system cannot retrieve learners' progress and scores from content that does not comply with SCORM or AICC standards. See SCORM and AICC Compliance.
URL/File Path	Enter the URL that the learner uses to access a web-based learning component, such as a test or survey. If there is a relative URL provided by the compliant content, this URL field is used to enter the base URL to which the relative URL is appended.
Manage Content	Click to access the Manage Online Class Content page if the component is AICC or SCORM compliant.

Web-Based, Test, and Survey Learning Components

Web-based, test, and survey learning components represent types of learning that are self-paced and delivered over the Internet or an Intranet. Learners access web-based, test, and survey learning components by clicking hyperlinks from self-service pages. Web-based, test, and survey learning components can be internally developed content or they can be custom-made or stock courses developed by and purchased from third-party vendors.

SCORM and AICC Compliance

Web-based, test, and survey learning components can be standards compliant or standards non compliant. The advantage of using learning components that are standards compliant is that you can load content files and retrieve learner progress data (such as scores and lesson completion) from the content. Enterprise Learning Management can then use these scores to determine passing.

See Understanding the Learning Component Completion Engine and Understanding the Class Completion Engine..

Enterprise Learning Management supports the following structures:

- Sharable Content Object Reference Model (SCORM) 1.1, 1.2, and 2004, Edition 4.

  See http://www.adlnet.org.

- Aircraft Industry Computer Based Training Committee (AICC).

When you create the learning component you load the content metadata files for that offering. Then learners can launch the content by clicking a hyperlink. Since the content is compliant, the content sends progress and score data back to your system.

Note: Web-based, test, and survey learning components can also be non standards compliant. Learners still launch the content by clicking a hyperlink, but there would be no way to retrieve scores or other data from the content. Non compliant content can be any type of web-based content that is launchable from a URL. You can link to HTML, PDF, Microsoft Word, Excel, or PowerPoint documents, and so forth.

Passing Status and Compliant Learning Component Lessons

You do not have to require learners to pass compliant learning components. If you do not make passing required for a compliant learning component then the learning component completion engine would not use the learner's passing status when determining the learner's completion status. However, if you do want to make passing required, you must define a minimum score that the system will use to determine the learner's passing status.

The system determines the learner's score based on the compliant content's lessons. When you upload compliant course content you can see the lessons that make up the course. At that time you can select which lessons you want to count toward the overall component score. Also, when you upload the course content, part of the data that gets uploaded is the mastery score for the lessons. The mastery score is the score the content provider has established as the minimum passing score.

As learners complete lessons, they are given a passing status and a score (sometimes they are only given a status. See table below). The Auto Mark Class Completion process retrieves the passing status and lesson scores (if provided) from the content provider. The system then calculates the learner's learning component score that will be compared with the minimum score that you established on the Completion page. The learning component score is based on a learner's aggregate performance across all of the lessons that have been marked as counting toward the learning component score.

The learning component score is the ratio of the number of selected lessons completed successfully to the total number of selected lessons in the class. So if a compliant content offering contained 6 lessons, and you selected four of them to count toward the score, and the learner completed two of them, he or she would receive a score of 50 (2/4).

The system determines when to grant credit for a lesson by evaluating the lesson status returned and, in some cases, the lesson scores. The following table shows how the system interprets the lesson status and the learner's lesson score (if applicable):

Lesson Status	***Learner's Lesson Score***	***Internally Assigned Success Rating***
Passed	Not Applicable	Successful
Failed	Not Applicable	Not Successful
Completed	Equal to or greater than mastery score.	Successful
Completed	Less than mastery score.	Not Successful

Lesson Status	***Learner's Lesson Score***	***Internally Assigned Success Rating***
Incomplete	Not Applicable	Not Assigned
Browsed	Not Applicable	Successful
Not Attempted	Not Applicable	Not Assigned

When a learner receives a lesson status of Passed, the score is not applicable. The system automatically interprets that as a success. The only time the system uses the score is when the learner receives a lesson status of Completed. In this case, the system doesn't know if the learner met the minimum requirements for passing the lesson, so it uses the score to determine whether to grant the learner credit for the lesson.

When a learner receives a success rating of Success for a lesson, the system updates the learners component score. When the learner achieves the minimum score the system sets the learning component passing status to Pass. If the learner has not achieved a passing status of Pass by the end of the learning period the system sets the learning component completion status to Incomplete.

Related Links

Select Lessons Page

Creating Web-Based Learning Components

To create web-based learning components, use the Maintain Classes (LM_ACT) component.

Pages Used to Create Web-Based Learning Components

Page Name	***Definition Name***	***Usage***
Web-based Component Page	LM_LC_WEB	Create and edit web-based learning components.

Web-based Component Page

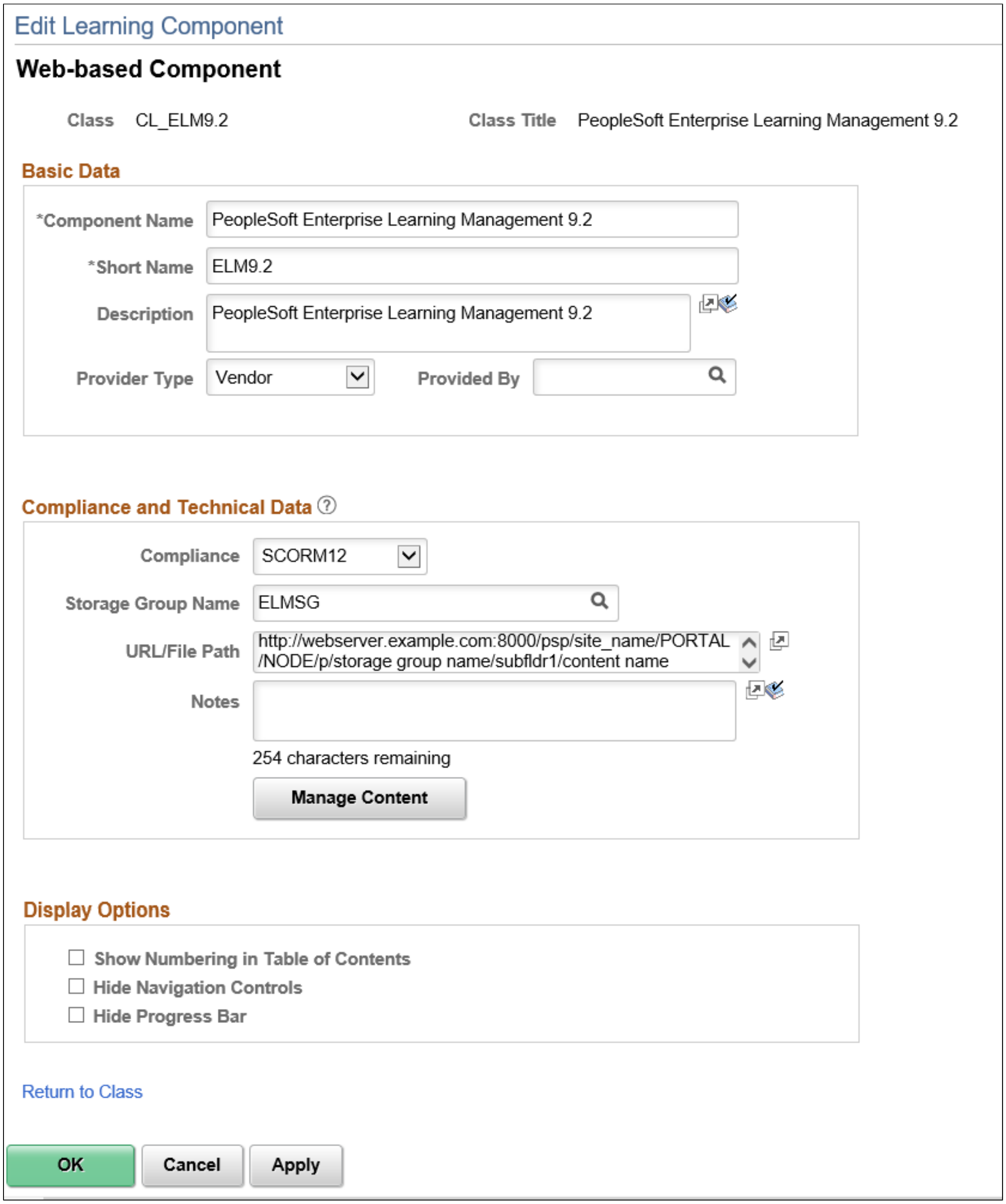
Use the Web-based Component page (LM_LC_WEB) to create and edit web-based learning components.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Learning Components**

- Click **Add Component** on the Learning Components page. Then select **Web-based.**
- Click the Edit link for an existing Web-based learning component.

This example illustrates the fields and controls on the Web-based Component page.



Basic Data

Use the fields in this section to enter basic data for the learning component.

Field or Control	***Description***
Component Name and **Short Name**	Enter a long and short name for the learning component.

Field or Control	Description
Description	Enter a detailed description for the learning component.
Provider Type	Select whether a *Department* or *Vendor* is providing the learning component content.
Provided By	Enter the specific department or vendor providing the learning component content.

Compliance and Technical Data

Use this section to specify compliance information for the learning component.

Field or Control	Description
Compliance	Select the type of compliance for the learning component. Values are: • *AICC-API* • *AICC-HACP* • *None* **Note:** If you select this value, the **Display Options** group box is unavailable. • *SCORM11* • *SCORM12* **Note:** SCROM11 and SCROM12 compliant content can be made secure using storage groups. • *SCORM2004*
Storage Group Name	Select the name of the storage group for the SCROM11 or SCROM12 compliant content to be made secure. **Note:** SCROM11 and SCROM12 compliance can also be used without the storage groups. In such cases, you can leave this field blank. For more information on Storage Group Management, see the product documentation for *PeopleTools: Portal Technology,* Creating Access Control for Files on the Web Server.

Field or Control	Description
URL/File Path	Enter the URL or file path used to access the compliant content. **Note:** For SCROM11 and SCROM12 compliant content that uses storage group, enter the URL to the files that learners can access on the web server using the psp servlet. For example: http://webserver.example.com:8000/psp/site_name/PORTAL/NODE/p/storage group name/content subfolder name/content name
Notes	Enter any additional notes about the compliant content.
Manage Content	Click to access the Manage Online Class Content Page where you can upload and configure compliant content files.

Display Options

Define how the system displays compliant content in the PeopleSoft Fluid User Interface.

Field or Control	Description
Show Numbering in Table of Contents	Select to display the numbers of the chapters and subchapters presented in the left panel for compliant content accessed through the PeopleSoft Fluid User Interface. This check box is deselected by default.
Hide Navigation Controls	Select to hide the Previous, Next, and Save buttons that appear for compliant content accessed through the PeopleSoft Fluid User Interface. **Note:** This field is not available if you select *SCORM2004* in the **Compliance** field.
Hide Progress Bar	Select the check box to hide the progress bar when the compliant content is launched in a new window.

For more information on accessing compliant content using the PeopleSoft Fluid User Interface, see the documentation for the <Compliant Content> Page.

Creating Test Learning Components

To create test learning components, use the Maintain Classes (LM_ACT) component.

Pages Used to Create Test Learning Components

Page Name	*Definition Name*	*Usage*
Test Component Page	LM_LC_TEST	Create test learning components.

Test Component Page

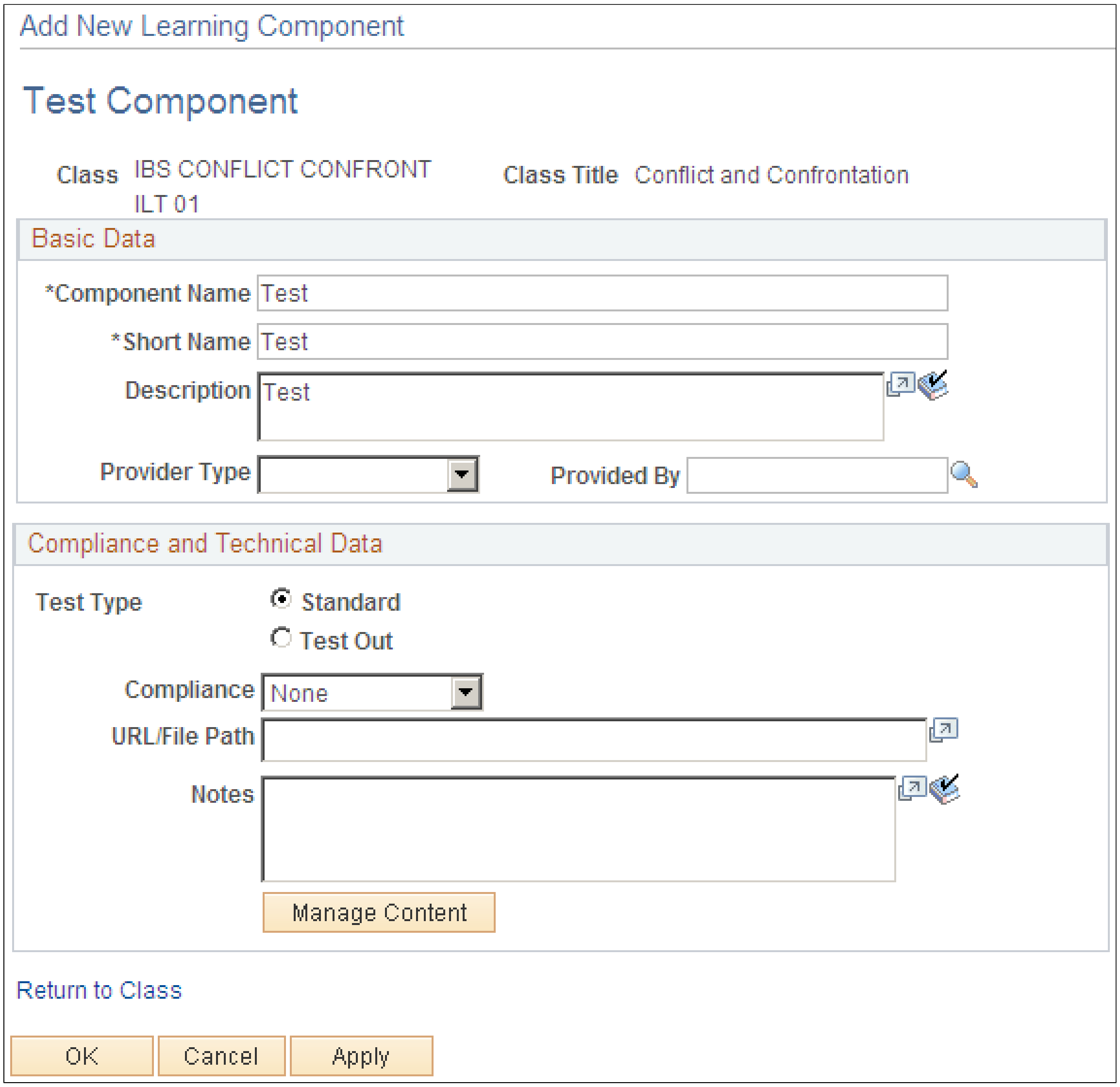
Use the Test Component page (LM_LC_TEST) to create test learning components.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Learning Components**

Click **Add Component** on the Learning Components page. Then select **Test.**

This example illustrates the fields and controls on the Test Component page.



Basic Data

Use the fields in this section to enter basic data for the learning component.

Field or Control	*Description*
Component Name and **Short Name**	Enter a long and short name for the learning component.
Description	Enter a detailed description for the learning component.
Provider Type	Select whether a *Department* or *Vendor* is providing the learning component content.

Field or Control	***Description***
Provided By	Enter the specific department or vendor providing the learning component content.

Compliance and Technical Data

Use this section to specify compliance information for the learning component.

Field or Control	***Description***
Test Type	Select whether this is a standard test or a test out. If you select *Test Out,* the learner passes or completes the class if he or she passes or completes this component, even if there are other components in this class that are required. If you select *Test Out,* communicate to the learner that this test is a test out either in the name of the component, in the description, or in both. The system does not automatically identify to the learner that this test is a test out.
Compliance	Select the type of compliance for the learning component. Values are: • *AICC-API* • *AICC-HACP* • *None* **Note:** If you select this value, the Display Options group box is unavailable. • *SCORM11* • *SCORM12* • *SCORM2004*
URL/File Path	Enter the URL or file path used to access the compliant content.
Notes	Enter any additional notes about the compliant content.
Manage Content	Click to access the Manage Online Class Content Page where you can upload and configure compliant content files.

Display Options

Define how the system displays compliant content in the PeopleSoft Fluid User Interface.

Field or Control	*Description*
Show Numbering in Table of Contents	Select to display the numbers of the chapters and subchapters presented in the left panel for compliant content accessed through the PeopleSoft Fluid User Interface. This check box is deselected by default.
Hide Navigation Controls	Select to hide the Previous, Next, and Save buttons that appear for compliant content accessed through the PeopleSoft Fluid User Interface. **Note:** This field is not available if you select *SCORM2004* in the **Compliance** field.

For more information on accessing compliant content using the PeopleSoft Fluid User Interface, see the documentation for the <Compliant Content> Page.

Creating Survey Learning Components

To create survey learning components, use the Survey Definition (LM_SURVEY_DEFN) and Maintain Classes (LM_ACT) components.

Enterprise Learning Management also integrates with third-party survey engines to launch surveys and track completion status of the survey. Examples of survey learning components include:

- Post-class survey to gather learner feedback on the effectiveness of the instructor, learning material, and overall class.
- Learning component survey to gather learner feedback on the effectiveness of a particular learning component.

Pages Used to Create Survey Learning Components

Page Name	*Definition Name*	*Usage*
Survey Definition Page	LM_SURVEY_DEFN	Define internal surveys.
<Survey Description> Page	LM_SURVEY	Access a test version of the survey you are defining.
Survey Component Page	LM_LC_WEB	Define survey learning components.

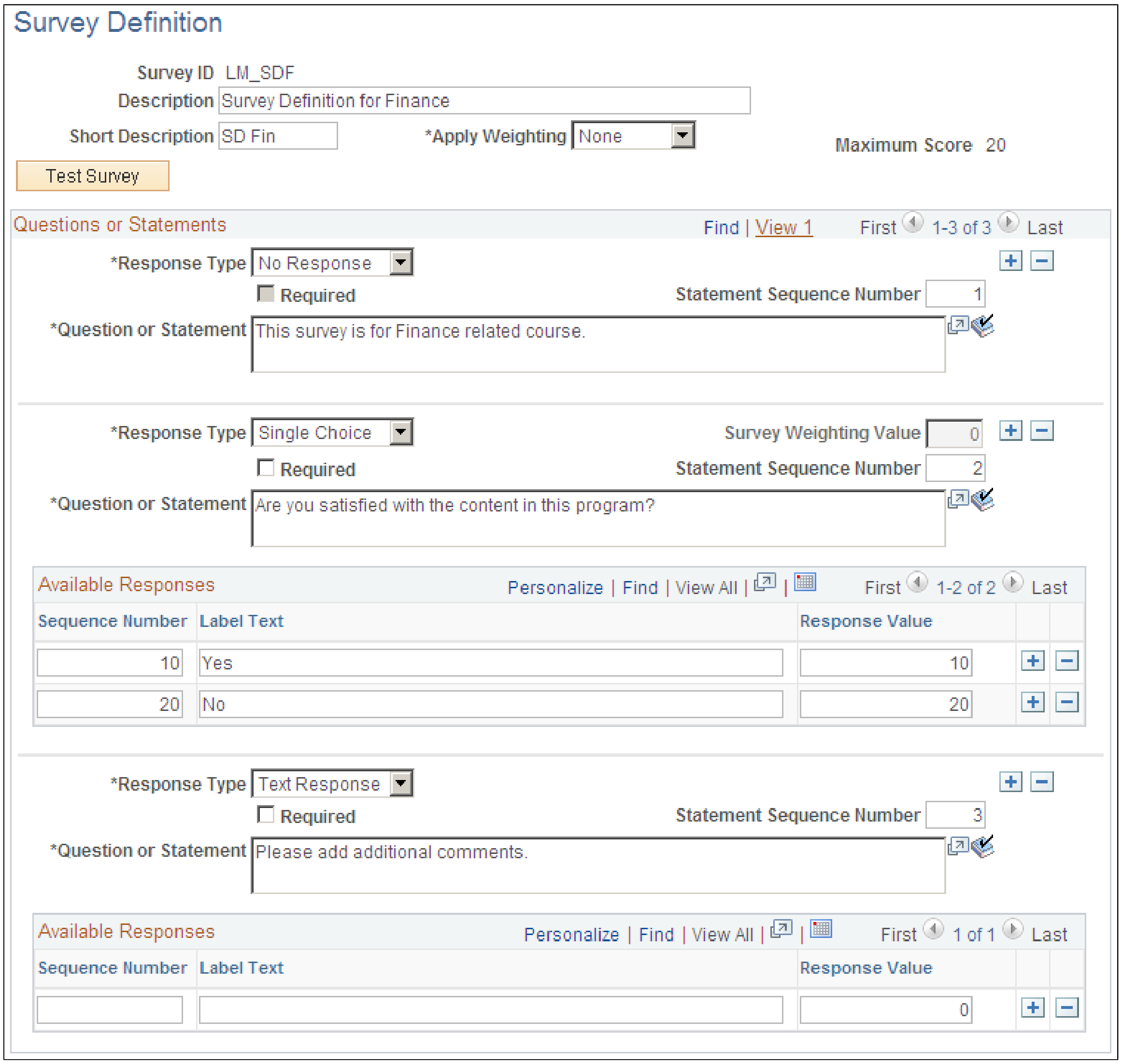
Survey Definition Page

Use the Survey Definition page (LM_SURVEY_DEFN) to define internal surveys.

Navigation:

Set Up ELM > Catalog > Survey Definition > Survey Definition

This example illustrates the fields and controls on the Survey Definition page.



Field or Control	*Description*
Apply Weighting	Specify whether the **Survey Weighting Value** field is available in the Questions or Statements group box. Values are: • *None:* Select to make the **Survey Weighting Value** field unavailable. • *Multiplier:* Select to make the **Survey Weighting Value** field available and required.
Test Survey	Click to access a testable version of the survey you are defining.

Questions or Statements

Use this group box to define the questions and statements that appear on the survey.

Field or Control	*Description*
Response Type	Select the type of response for the question or statement. Values are: • *Multiple Choice:* Select to define a question for which the survey taker can select more than one defined response using check marks. • *No Response:* Select to define a statement that requires no response. • *Single Choice:* Select to define a question for which the survey taker can select only one of the defined responses using radio buttons. • *Text Response:* Select to define a question for which the survey taker can enter free form text as a response.
Survey Weighting Value	Enter a weighting value for a response type. The default value is *1*. This field is available only if you select *Multiply* in the **Apply Weighting** field.
Required	Select to require that the survey taker enter a response for a question before submitting the survey. This field is unavailable for statements with a **Response Type** of *No Response.*
Statement Sequence Number	Enter a sequence number to determine where the question or statement appears in the survey.

Field or Control	*Description*
Question or Statement	Enter the text of the question or statement.

Available Responses

For questions with a **Response Type** of *Multiple Choice* or *Single Choice,* define the answers using the fields in the Available Responses group box. On the survey, responses for Multiple Choice questions have check boxes next to them. Responses for Single Choice questions have radio buttons next to them. You can also enter available responses for *Text Response* questions. In this case, the text of the responses appears to the left side of the text box on the survey.

Field or Control	*Description*
Sequence Number	Enter sequence numbers to determine the order in which the available responses appear in the survey.
Label Text	Enter the text of the response.

Field or Control	*Description*
Response Value	Enter a numeric value for each response.

Survey Component Page

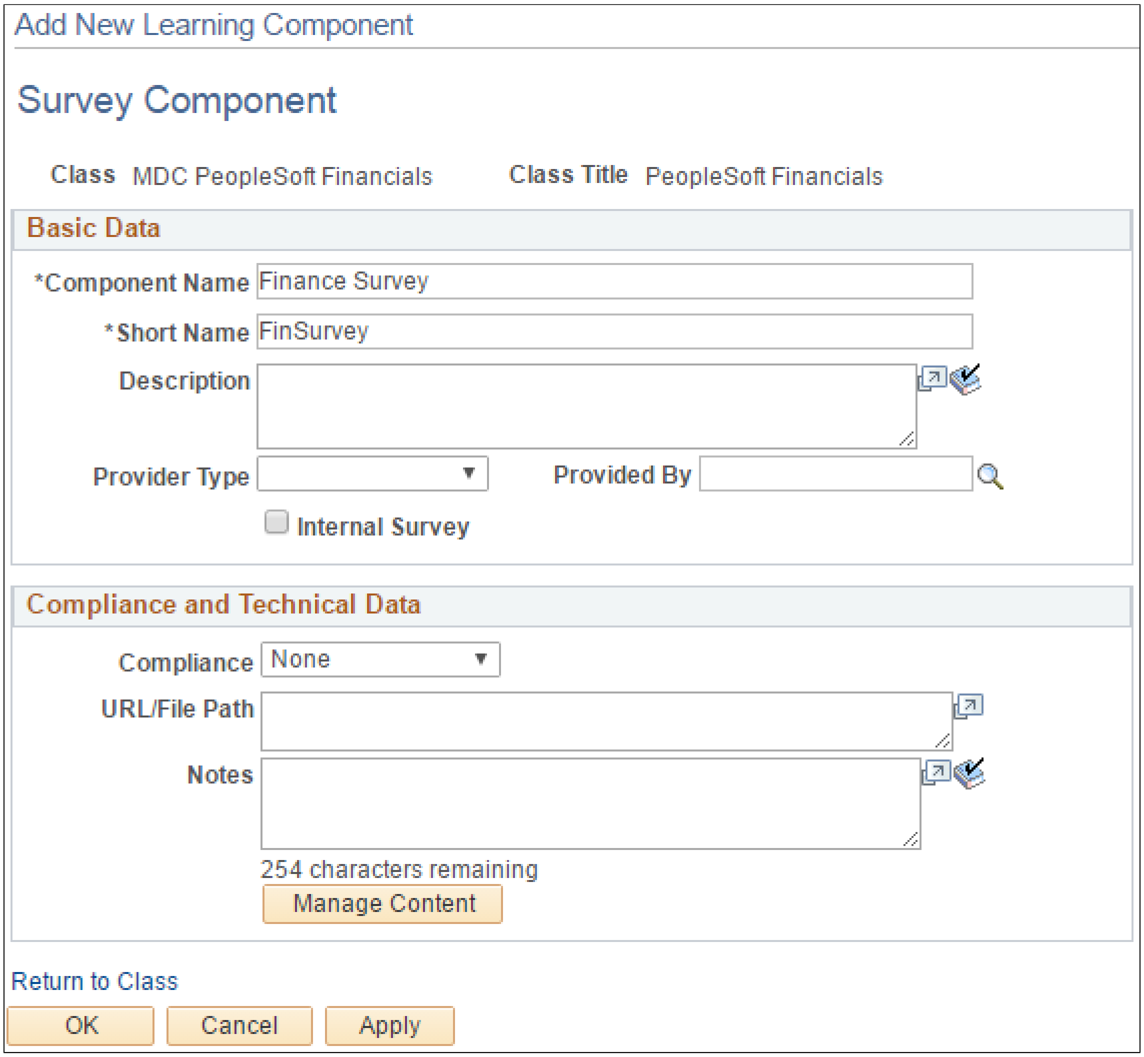
Use the Survey Component page (LM_LC_WEB) to define survey learning components.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Learning Components**

- Click **Add Component** on the Learning Components page. Then select **Survey.**
- Click the Edit link for an existing Survey learning component.

This example illustrates the fields and controls on the Survey Component page.



Basic Data

Use the fields in this section to enter basic data for the learning component.

Field or Control	***Description***
Component Name and **Short Name**	Enter a long and short name for the learning component.
Description	Enter a detailed description for the learning component.
Provider Type	Select whether a *Department* or *Vendor* is providing the learning component content.
Provided By	Enter the specific department or vendor providing the learning component content.

Field or Control	***Description***
Internal Survey	Select to add an internal survey learning component. When you select this check box, the Compliance and Technical Data group box is replaced by the Survey Definition group box.

Survey Definition

This group box appears only if you select the **Internal Survey** check box.

Field or Control	***Description***
Survey ID	Enter the ID of the survey definition you want to use for the learning component.

Compliance and Technical Data

Use this section to specify compliance information for the learning component.

Field or Control	***Description***
Compliance	Select the type of compliance for the learning component. Values are: • *AICC-API* • *AICC-HACP* • *None* **Note:** If you select this value, the Display Options group box is unavailable. • *SCORM11* • *SCORM12* • *SCORM2004*
URL/File Path	Enter the URL or file path used to access the compliant content.
Notes	Enter any additional notes about the compliant content.

Field or Control	Description
Manage Content	Click to access the Manage Online Class Content Page where you can upload and configure compliant content files.

Display Options

Define how the system displays compliant content in the PeopleSoft Fluid User Interface.

Field or Control	Description
Show Numbering in Table of Contents	Select to display the numbers of the chapters and subchapters presented in the left panel for compliant content accessed through the PeopleSoft Fluid User Interface. This check box is deselected by default.
Hide Navigation Controls	Select to hide the Previous, Next, and Save buttons that appear for compliant content accessed through the PeopleSoft Fluid User Interface. **Note:** This field is not available if you select *SCORM2004* in the **Compliance** field.

For more information on accessing compliant content using the PeopleSoft Fluid User Interface, see the documentation for the <Compliant Content> Page.

Creating Podcast Learning Components

To create podcast learning components, use the Maintain Classes (LM_ACT) component.

Pages Used to Create Podcast Learning Components

Page Name	Definition Name	Usage
Podcast Component Page	LM_LC_WEB	Create and edit podcast learning components.

Podcast Component Page

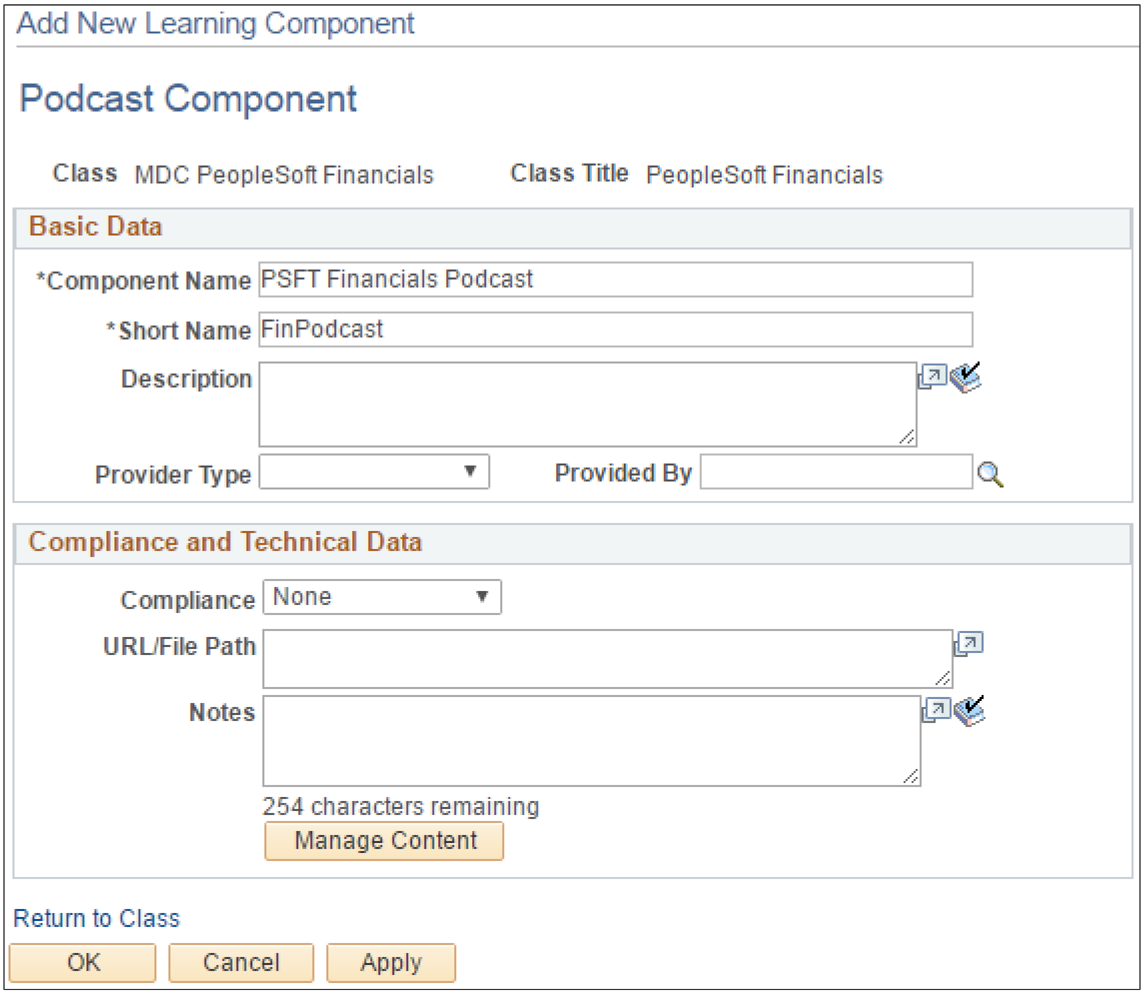
Use the Podcast Component page (LM_LC_WEB) to create and edit podcast learning components.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Learning Components**

- Click **Add Component** on the Learning Components page. Then select **Podcast.**
- Click the Edit link for an existing Podcast learning component.

This example illustrates the fields and controls on the Podcast Component page.



Basic Data

Use the fields in this section to enter basic data for the learning component.

Field or Control	***Description***
Component Name and **Short Name**	Enter a long and short name for the learning component.
Description	Enter a detailed description for the learning component.
Provider Type	Select whether a *Department* or *Vendor* is providing the learning component content.

Field or Control	*Description*
Provided By	Enter the specific department or vendor providing the learning component content.

Compliance and Technical Data

Use this section to specify compliance information for the learning component.

Field or Control	*Description*
Compliance	Select the type of compliance for the learning component. Values are: • *AICC-API* • *AICC-HACP* • *None* **Note:** If you select this value, the Display Options group box is unavailable. • *SCORM11* • *SCORM12* • *SCORM2004*
URL/File Path	Enter the URL or file path used to access the compliant content.
Notes	Enter any additional notes about the compliant content.
Manage Content	Click to access the Manage Online Class Content Page where you can upload and configure compliant content files.

Display Options

Define how the system displays compliant content in the PeopleSoft Fluid User Interface.

Field or Control	***Description***
Show Numbering in Table of Contents	Select to display the numbers of the chapters and subchapters presented in the left panel for compliant content accessed through the PeopleSoft Fluid User Interface. This check box is deselected by default.
Hide Navigation Controls	Select to hide the Previous, Next, and Save buttons that appear for compliant content accessed through the PeopleSoft Fluid User Interface. **Note:** This field is not available if you select *SCORM2004* in the **Compliance** field.

For more information on accessing compliant content using the PeopleSoft Fluid User Interface, see the documentation for the <Compliant Content> Page.

Managing Compliant Content

To manage compliant content, use the Maintain Classes (LM_ACT) component.

Pages Used to Manage Compliant Content

Page Name	***Definition Name***	***Usage***
Manage Online Class Content Page	LM_EL_IMPORT	Upload and configure compliant content files.
Select Lessons Page	LM_LEL_SCO_WEIGHT	Select the lessons from compliant content that you want to have count toward passing the learning component.

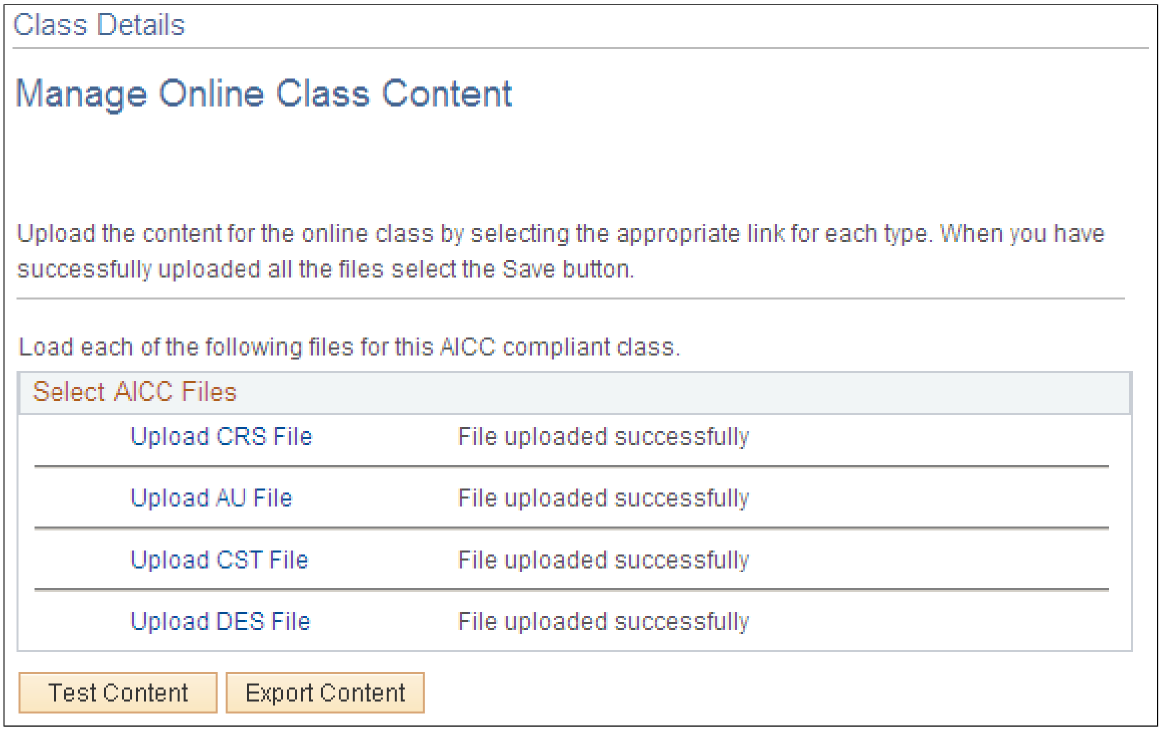
Manage Online Class Content Page

Use the Manage Online Class Content page (LM_EL_IMPORT) to upload and configure compliant content files.

Navigation:

Click the **Manage Content** button from the Survey Component, Test Component, or Web-based Component pages.

This example illustrates the fields and controls on the Manage Online Class Content page.



Use this page to:

- Upload structure files.
- Test the launching of the content.
- Export structure files.
- Select the lessons within the course content that you want to count toward completion of the learning component.

Uploading Structure Files

To upload structure files:

1. Click each of the file type links to browse, locate, and upload each structure file.

   SCORM compliant vendors structure files in XML format. SCORM 1.1 provides the following file: Content.CSF. SCORM 1.2 and 2004 require that a zip file Content.ZIP be uploaded that contains the content structure file. During the upload the system will automatically unzip the file.

   Note: The system uses the java class java.util.zip to unzip the Content.ZIP file. Due to a bug with java's zip dll (dynamic link library), this process sometimes fails. If this should happen, unzip the file using PKZip or WinZip and then rezip it using WinZip. Then, upload the structure file again.

   AICC compliant vendors structure files in AICC format. They provide the following files:

   - Content.CRS
   - Content.DES

- Content.CST
- Content.AU

2. Click the **Save** button after you upload all structure files.

   If the save operation is successful, the **Test Content, Export Content,** and **Select Lessons** buttons appear.

   Note: If there are any errors in the structure files, the system displays an appropriate error message. You must correct the errors and reload the corrected structure file. When you click the **Save** button the system first saves the new files associated with the class into the database (permanently deleting the previous set of data), and then runs validation on new structure data and checks for consistency and correctness.

Uploading the SCORM Content Files

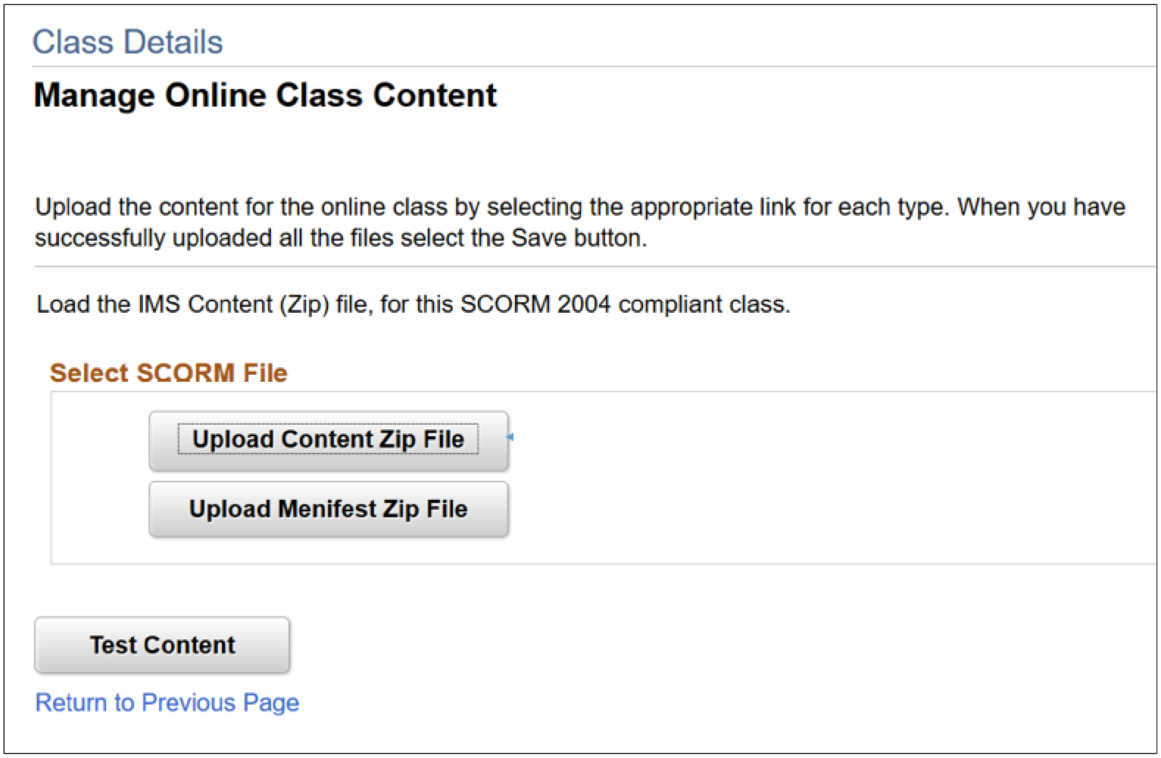
As an administrator, you can upload SCORM (Sharable Content Object Reference Model) compliant content files using the Manage Online Class Content page leveraging HTTP file upload ability. Here, the secured Storage Group serves as the HTTP repository for the content.

Note: For uploading large files (more than 20 to 50MB), Oracle recommends traditional file upload.

To upload the SCORM content:

- Create a Root Folder and HTTP Repository Path: Create a storage group root folder to securely store your file/content under PS_CFG_HOME/peoplesoft/applications/peoplesoft/PORTAL.war/WEB-INF/. The required name for the storage group root folder is stogroup/site_name. And create group parent folders under this storage group root folder. Use the Storage Group Management page to create an alias to the storage group parent folder on the web server and associate your PeopleCode implementation to the parent folder.
- Modify URL Definition: Use the URL Maintenance page and modify the URL definition LM_SCORM_UPLOAD for file upload.
- Enter URL/File Path: Use the Compliance and Technical Data section on the Web-based Component page (LM_LC_WEB) to enter the URL or file path used to access the compliant content. Provide users with URLs to the files that they can access on the web server using the psp servlet. For example, the URL to CS101_syllabus.pdf in the subfldr1 folder would be: http://webserver.example.com:8000/psp/site_name/PORTAL/NODE/p/ELM1/subflder1/CS101_syllabus.pdf
- Upload the Content: Use the Manage Online Class Content page (LM_EL_IMPORT) to upload and test content files.

This example illustrates the Manage Online Class Content page to upload SCORM compliant content as ZIP file.



Use the ‘Upload Content Zip File’ button to upload the content zip file for the class. The uploaded file will be unzipped and saved on the location defined under URL/Filepath.

Note: Any files/contents placed inside a Storage Group are secure and cannot be accessed directly. It is only accessible through PeopleTools Servlets. The SCORM contents are placed within a private folder inside the storage group and accessed through the storage group servlet.

Testing the Learning Component

After you have successfully saved the structure files, the **Test Content** button appears.

To test the class:

1. Click the **Test Content** button to launch the content and access the Table of Contents page, which lists the lessons in the class.

2. Click one of the lesson links on the Table of Contents page and verify that the class content launches successfully.

If the test launch fails, the system raises the appropriate error message. You might need to modify the launch URL of one or more of the structure files. If you make any corrections, you must upload and save all of the files again.

Exporting Content Structure Files (for Both SCORM and AICC Content)

As part of compliance with AICC standards, the system enables you to export course structure files. You can export the structure files if you need to make changes to the content structure or if you need to import the structure into any content management system.

To export content structure files, click the **Export Content** button on the Manage Online Class Content page. This exports the content structure files from the database in a flat file format. The system generates new file names by appending an internal class ID (a number) to the original name of the imported structure files. The system places the files in the directory specified by the Export Content Directory setup option.

Selecting Course Content Lessons

Click Select Lessons to select the lessons within the course content that you want to count toward completion of the learning component.

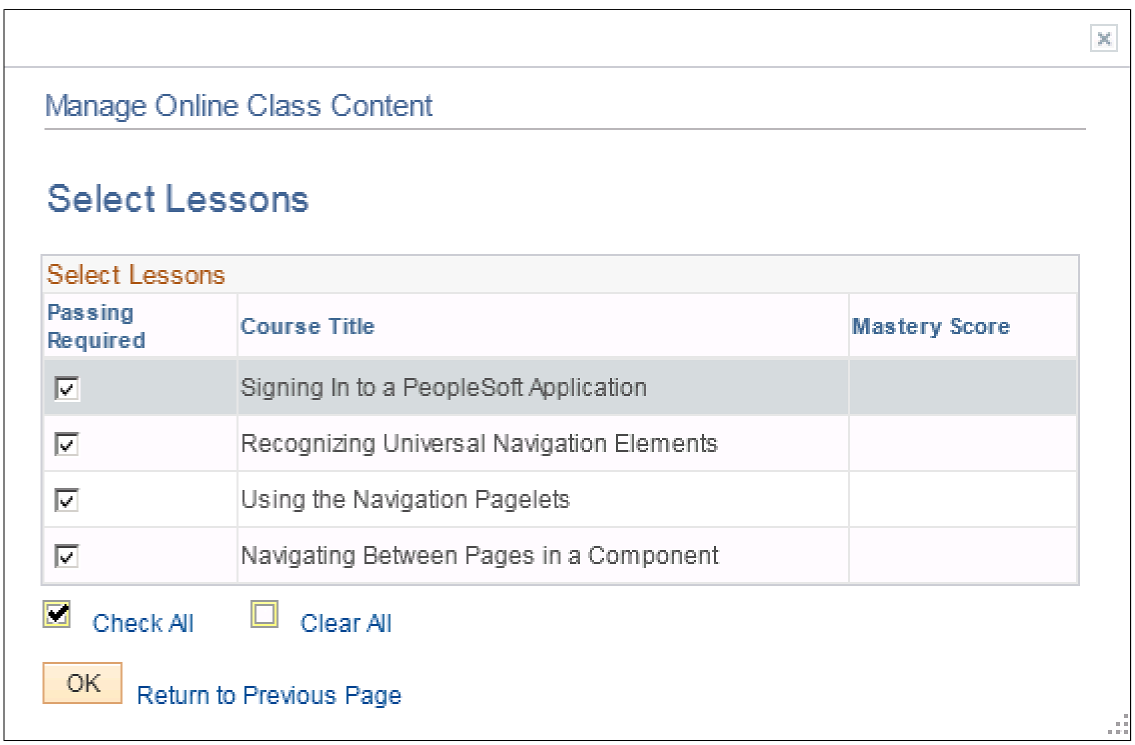
Select Lessons Page

Use the Select Lessons page (LM_LEL_SCO_WEIGHT) to select the lessons from compliant content that you want to have count toward passing the learning component.

Navigation:

Click the **Select Lessons** button from the Manage Online Class Content page.

This example illustrates the fields and controls on the Select Lessons page.



Field or Control	Description
Passing Required	Select if you want this lesson to count toward the learner's overall score for this learning component. If you deselect this check box, the learner can take the lesson but the outcome will not figure into the calculation of the learner's score. You cannot edit this check box after a learner has launched any lesson in the course.
Course Title	The title of the lesson.
Mastery Score	The numerical value the content provider has established as the minimum passing score for this lesson. The Auto Mark Class Completion process retrieves the learner's scores for each required lesson from the content and the completion engine compares the learner's scores with the mastery score to determine the learner's overall learning component score.

Related Links

Passing Status and Compliant Learning Component Lessons

Managing Learning Tools Interoperability Integration

PeopleSoft Enterprise Learning Management supports Learning Tools Interoperability (LTI), a standard protocol developed by the IMS Global Learning Consortium. With the LTI integration, PeopleSoft ELM can seamlessly integrate with Zoom and other LTI compliant vendors.

Pages Used to Manage LTI Integration

Page Name	Definition Name	Usage
LTI Provider Page	LM_EL_IMPORT	Set up an LTI provider.
LTI Setup Page	LM_LEL_SCO_WEIGHT	Associate an LTI provider with a class definition as an Instructor or Administrator.

LTI Provider Page

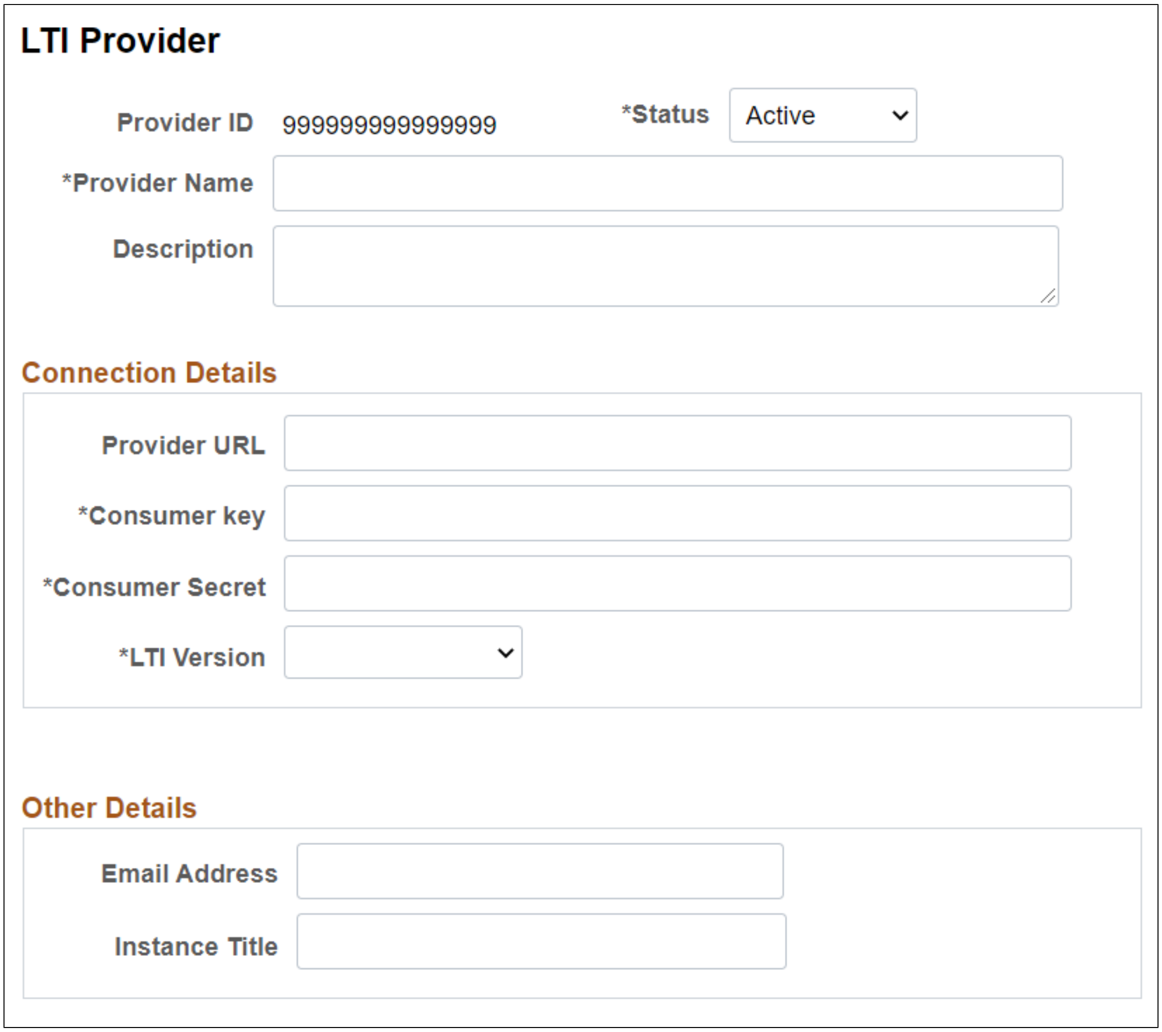
Use the LTI Provider page to set up an LTI provider (In this example, Zoom).

Note: Zoom LTI Pro is used as an example to illustrate the setup of the LTI provider and launching the LTI resource. The same steps apply to any supported LTI provider. The Connection Details in LTI provider setup can be obtained from the provider upon registration for their service.

Navigation

Enterprise Learning > **Organizations** > **LTI Provider**

This example illustrates the fields and controls on the LTI Provider page.



Field or Control	*Description*
Provider ID	This is an auto-generated number.
Status	Select ‘Active’.
Provider Name	Enter the name of the provider here.
Description	Enter the description of the provider here.
Provider URL	This is the launch URL for the provider. For Zoom, this can be found in Zoom LTI Pro app configuration in Zoom Market Place. This will be provided by the Zoom administrator.

Field or Control	***Description***
Consumer Key	For Zoom, this can be found in Zoom LTI Pro app configuration in Zoom Market Place. This will be provided by the Zoom administrator.
Consumer Secret	For Zoom, this can be found in Zoom LTI Pro app configuration in Zoom Market Place. This will be provided by the Zoom administrator.
LTI Version	Select the version of the tools provider. Zoom LTI Pro supports LTI 1.1.1. **Note:** Currently PeopleSoft supports LTI 1.1.1.
Email Address	Email ID of the contact person of the tools consumer organization.
Instance Title	A title for tools consumer environment.

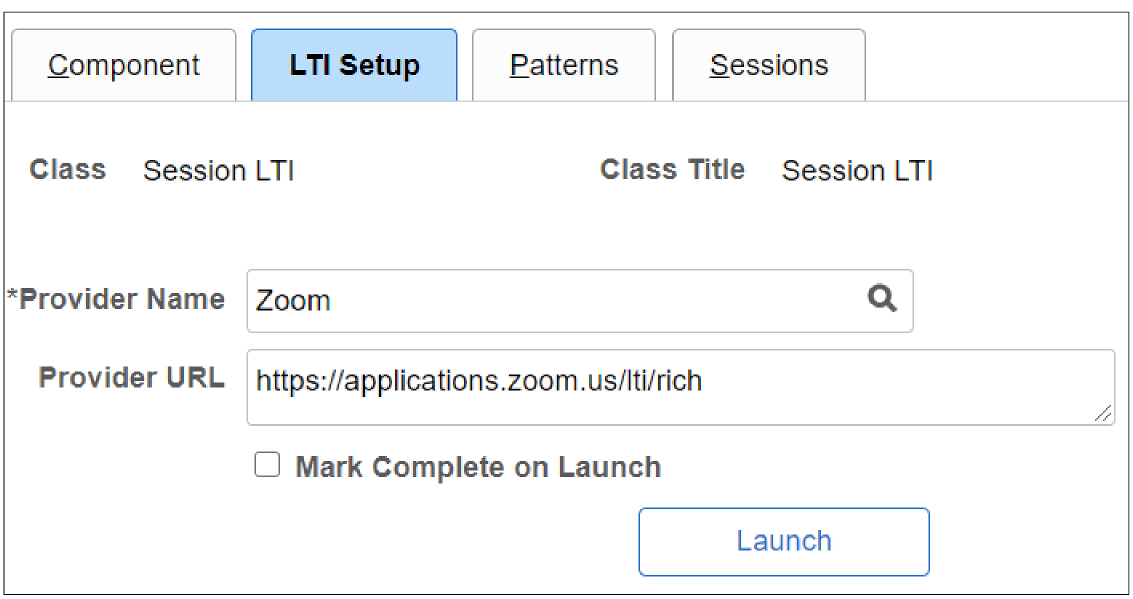
LTI Setup Page

Use the LTI Setup page to associate an LTI provider with a class definition while defining the learning components of the class.

Navigation

Enterprise Learning > **Catalog** > **Maintain Classes** > **Learning Components** > **LTI Setup**

This example illustrates the fields and controls on the Manage Online Class Content page.



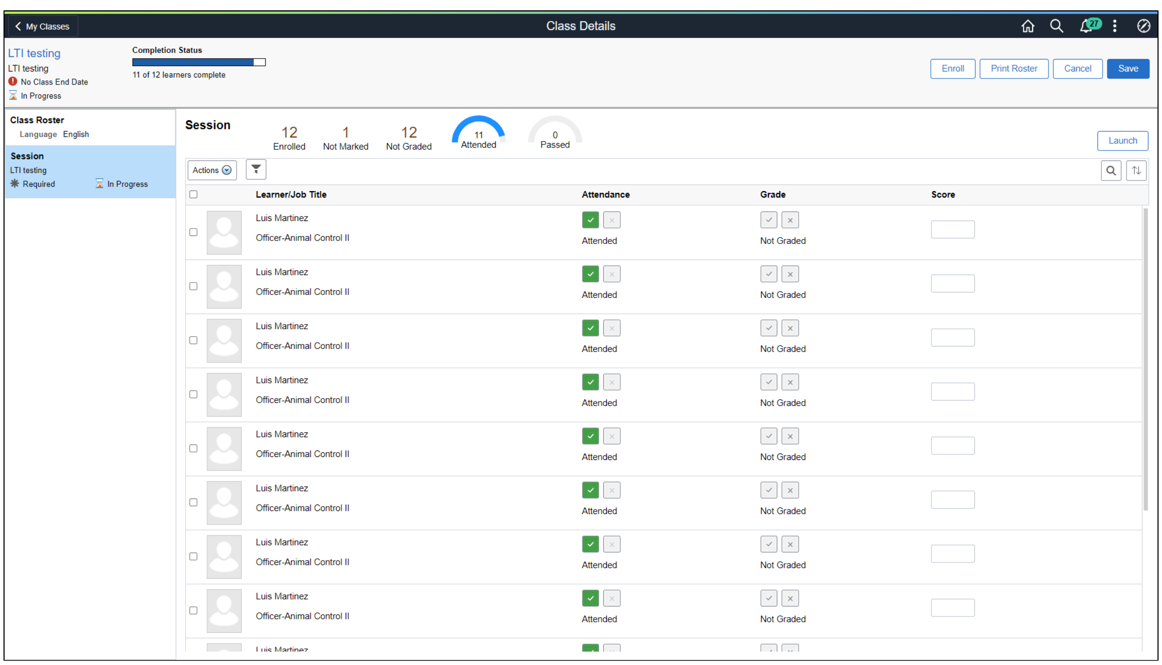
Field or Control	***Description***
Provider Name	Select the Provider. The option lists all active providers. In this example, the active provider defined is Zoom.
Provider URL	This would be auto-populated based on the URL defined for zoom in the setup page. (LTI Provider page) **Note:** If the URL is not defined in the setup page, then this field will be editable. The instructor can define core specific URL here.
Mark Complete on Launch	Select to mark the enrollment status as completed when the learner launches zoom.
Launch	Use the Launch button to launch Zoom intermediate window. **Note:** Instructor or Administrator can launch Zoom intermediate window from here.

Also, the Instructor can open the required session from the Instructor fluid home page and use the Launch button in the Class Details page to launch the learning resource.

Navigation

Learning Instructor fluid home page > Class Actions tile > My Classes > Class Details

This example illustrates the Class Details page.



Launching the Learning Resource as a Learner

A learner can launch the learning resource (Example: Zoom dashboard) from the Employee Self Service fluid home page.

Note: Classic self-service is not supported.

For Learners the Launch button is enabled for the classes that have Zoom configured.

The functionality is available on the below pages:

- Under My Learning, both at Class and Learning Component level for enrolled courses and registered programs.
- Under Find Learning both at Class and Learning Component level for enrolled courses and registered programs.

Chapter 18

Managing Session, Webcast, and Assignment Learning Components

Understanding Sessions, Webcasts, and Assignments

Sessions, webcasts, and assignments are types of learning components. Sessions and webcasts are similar in that they are both scheduled. In other words, they provide a means to bring learners and instructors together on a specific date, at a specific time. A session learning component differs from a webcast learning component in that it also provides a physical place where the learners come together with the instructor, such as in a classroom, whereas a webcast meets over the Internet. So webcast learning components provide a virtual classroom environment, whereas session learning components provide a physical classroom environment.

Both session and webcast learning components contain sessions. A session, in this sense, is a single block of time designated for instruction. For example, a session or webcast learning component could consist of three days of instruction, Monday, Wednesday, and Friday, between 8:00 a.m. and 5:00 p.m. each day. Thus, in this example, three blocks of time are designated for instruction, so this learning component would consist of three sessions.

When you schedule session and webcast learning components, you can use session patterns. Session patterns facilitate the creation of session and webcast learning components that occur over multiple days.

Integration with PeopleSoft Enterprise Time and Labor

If you use PeopleSoft Enterprise Time and Labor, the calendar and schedule pages in that application can display the times that internal learners are scheduled for training in Enterprise Learning Management.

Two Enterprise Integration Points (EIPs) are delivered with Enterprise Learning Management to support this feature:

- Scheduled Time FullSync

  Use the Scheduled Time Export page (Set Up ELM, Export Scheduled Time) to run this EIP once during system implementation to publish information about the sessions and webcasts set up in Enterprise Learning Management.

- Scheduled Time Sync

  Activate this incremental EIP after you run the full sync EIP. Whenever sessions are added or changes are made to session dates or times, the incremental EIP will publish the information to Time and Labor. Enrolling or dropping a learner in a class that includes a session or a webcast component causes the EIP to publish learner-specific data to Time and Labor.

See the product documentation for *PeopleSoft HCM: Time & Labor*.

Creating Session Learning Components

To create session learning components, use the Maintain Classes (LM_ACT) and the Session Templates (LM_TMPL) components.

Pages Used to Create Session Learning Components

Page Name	***Definition Name***	***Usage***
Maintain Classes - Component Page	LM_LC_SES	Enter or modify name and description information for this learning component.
Patterns Page	LM_LC_PTRN	Create session patterns. You can base session patterns on a previously defined session template. You use session patterns to generate actual sessions when the session has a repeating pattern.
Sessions Page	LM_LC_SES_LIST	View and edit automatically generated sessions. You can also add and delete sessions.
Session Conflicts Page	LM_ACT_CNFL	View sessions that are in conflict. Click the **Session Date** link or the **Conflicting Class** link to access the Session Details page, where you can correct the conflict.
Session Details Page	LM_SES	Modify automatically generated session details, or create new sessions.
Room Detail Page	LM_ROOM_ADMIN_DTL	View room detail. The detail is the same as you see on the Room Details page, which you access from the Rooms page in the Facilities component.
Session Templates Page	LM_TMPL	Create session templates of common class session characteristics.

Understanding Session Learning Components

Session learning components are scheduled, instructor-led, classroom-based training. They are comprised of sessions. Sessions, in this sense, are blocks of time designated for instruction. When you create session learning components, you can define one or more sessions individually or you can define a session pattern. You also identify instructors, required equipment, and facilities.

To speed the creation of session patterns, you can define session templates that include commonly used scheduling patterns and resource assignments, including instructors, facilities, and materials. Templates decrease the amount of data entry required to create the same session definitions for multiple classes. You can apply a session template to a class that you are scheduling, and then modify the session patterns at the class level as necessary. Session patterns create actual sessions within the class.

Maintain Classes - Component Page

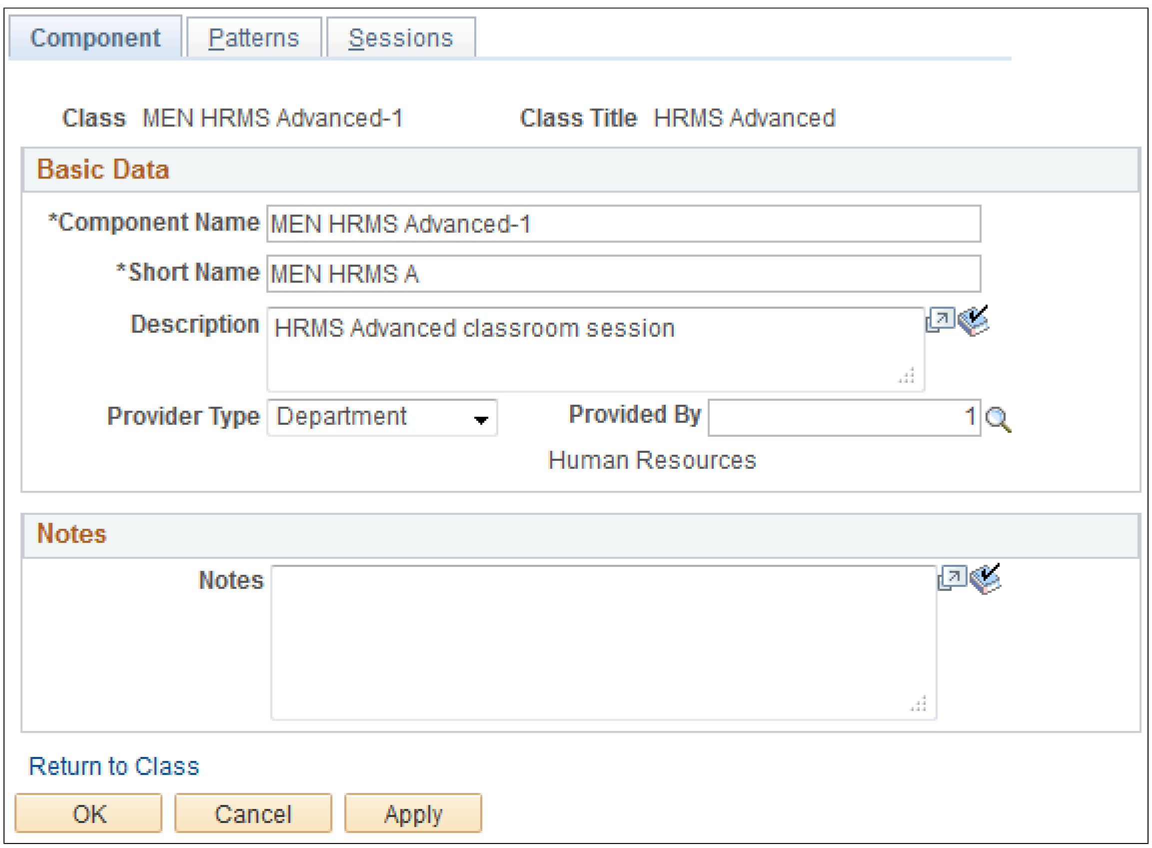
Use the Maintain Classes - Component page to enter or modify name and description information for this learning component.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Learning Components**

To create a session component, click Add Component, and then select Sessions. To edit a session component, click Edit.

This example illustrates the fields and controls on the Maintain Classes - Component page.



Field or Control	Description
Component Name and **Short Name**	Enter the full and short name for the session component.
Description	Enter a description for the session component.

Field or Control	***Description***
Provider Type	If the session component is provided by a *Department* or *Vendor* select a value in this field.
Provided By	If you select a value in the **Provider Type** field, use this field to enter the specific department or vendor that is providing the session component.
Notes	Enter any additional notes that you want to list for the session component.

Patterns Page

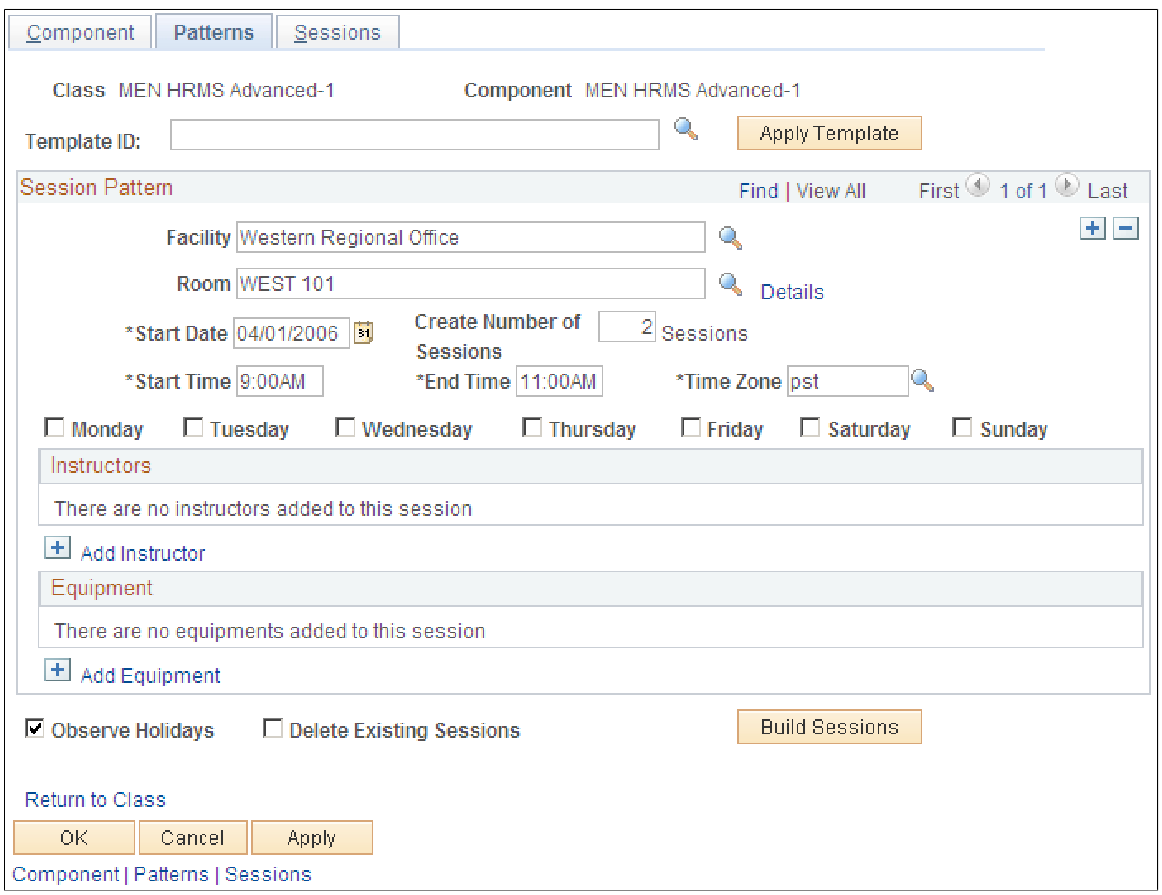
Use the Patterns page (LM_LC_PTRN) to create session patterns.

You can base session patterns on a previously defined session template. You use session patterns to generate actual sessions when the session has a repeating pattern.

Navigation:

From the Maintain Classes - Component page, click the Patterns page tab.

This example illustrates the fields and controls on the Patterns page.



Field or Control	***Description***
Template ID	Select a template if you want to use a template to create this session pattern. Create session templates on the Session Templates page.
Apply Template	Click to apply the template to your session pattern. The system creates the session based on the template that you apply. You can edit the session pattern after applying a template.

Session Pattern

Field or Control	***Description***
Facility	Enter the facility in which you want to hold this session. Define facilities on the Facility page.
Room	Enter the room in which you want to hold this session. Define rooms on the Rooms page.
Start Date	Enter the start date of this session. **Note:** This is not necessarily the start date of the class.
Create	Enter the number of sessions you want to create. This tells the system when to stop repeating the pattern that you define. The pattern only tells the system on which days it can schedule sessions, such as Tuesdays and Wednesdays. So if you tell the system to create 10 sessions, then the class would repeat every Tuesday and Wednesday for five weeks. The system determines which days based on the session pattern, the start date, and the number of sessions you want it to create. For an example of how the number of sessions you create affects session creation, see Number of Sessions Created Example later in this documentation. **Note:** If you do not enter the number of sessions to create, the system does not create any sessions.

Instructors

Click the **Add Instructor** link to add session instructors. Select an instructor type for each instructor. You can also specify the department or vendor that is providing the instructor's services in the **Provider Type** and **Provided By** fields. Any costs for the instructor are added to the class costs. Define instructor types on the Instructor Types page.

Note: The value of the **Name Display** field is populated by default with the value of the Primary Instructor field on the Maintain Classes - Class Details page. The value of the **Type** field is populated by default with the instructor type designated as the default on the Instructor Type page.

Equipment

Click the **Add Equipment** button to select equipment for the session. To narrow your search, select the equipment type. Define equipment types on the Equipment Types page.

Additional Elements

Field or Control	***Description***
Observe Holidays	Select this check box if you want to observe the holiday schedule that is linked to the facility that you selected for this session. If the system observes holidays and a holiday occurs on a day that would have otherwise become a session, the system finds the next available day and continues the pattern until it has created all the sessions that you specified. Holiday schedules are linked to facilities on the Facility page. For an example of how holidays affect session creation, see Number of Sessions Created Example later in this documentation.
Delete Existing Sessions	Select to delete all existing sessions if you have made changes to an existing pattern. The system deletes any sessions previously built by the pattern and any sessions that were added manually. If you don't select this check box, the system adds any new sessions that you build to the existing sessions.
Build Sessions	Click to build sessions based on the pattern that you defined. The system does not allow you to build sessions that fall outside of the class start and end dates.

Simple Session Pattern Example

Suppose a session or webcast learning component runs from June 6 through June 9, Monday to Thursday, and the learning component involves two instructors, one primary and one secondary. This requires four sessions with each session having two instructors. You can have the system generate the four sessions by creating a session pattern, either directly or by using a session pattern template. This table shows how the session template or session would be set up:

Field	***Field Value***
Facility	Building 1

Field	***Field Value***
Room	Room 1
Start Date	June 6
Start Time	10:00 a.m.
End Time	5:00 p.m.
Monday	Y
Tuesday	Y
Wednesday	Y
Thursday	Y
Friday	N
Saturday	N
Sunday	N

Complex Session Pattern Example

Although the preceding example is simple, session patterns can also handle a much more complicated session scenario. A session or webcast learning component can have multiple session patterns with multiple instructors for each. Using multiple session patterns for a session or webcast learning component is useful for those sessions that meet in several different facilities (for session learning components) or have different instructors or instructor combinations throughout the session. This table shows complicated examples and descriptions of how session patterns can be set up to automate the creation of sessions for session learning components:

Requirement	***Setup***
Learners meet for two weeks, Monday to Thursday in Room 1 and Friday in Room 2 with the same instructors for both weeks. This requires 10 sessions that the system can build from two session patterns.	The first session pattern spans both weeks, with Monday to Thursday selected and facility set to Room 1. The second session pattern also spans both weeks but with only the Friday option selected and facility set to Room 2.

Requirement	***Setup***
Same scenario as above, but four different primary instructors are needed, one each for Monday to Thursday of each week and one each for Friday of each week. This still requires 10 sessions but needs four session patterns.	The first session covers the first week with Monday to Thursday selected, facility set to Room 1, and instructor set to the first primary instructor. The second session covers only Friday of the first week, with Friday selected, facility set to Room 2, and instructor set to the second primary instructor. The third session covers the second week with Monday to Thursday selected, facility set to Room 1, and instructor set to the third primary instructor. The fourth pattern covers only Friday of the second week, with Friday selected, facility set to Room 2, and instructor set to the fourth primary instructor.

Number of Sessions Created Example

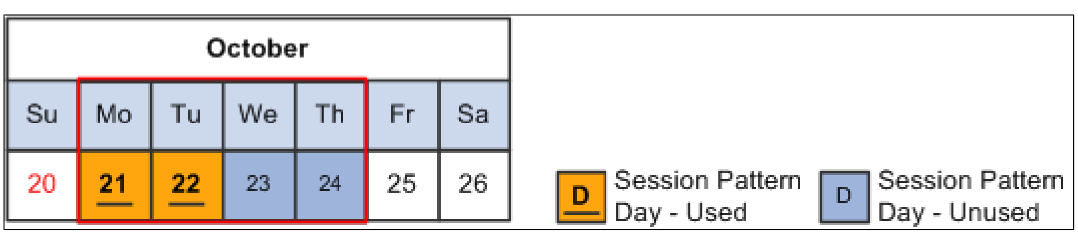
The following three scenarios show how the system creates sessions based on the number of sessions that you specify in conjunction with the pattern that you establish. Scenario 3 includes a holiday.

Scenario 1

This table presents requirements for scenario 1:

Parameter	***Value***
Start date	October 21
Number of sessions to create	2
Pattern days	Monday through Thursday
Holidays	N/A

This graphic shows the calendar with the results for scenario 1.

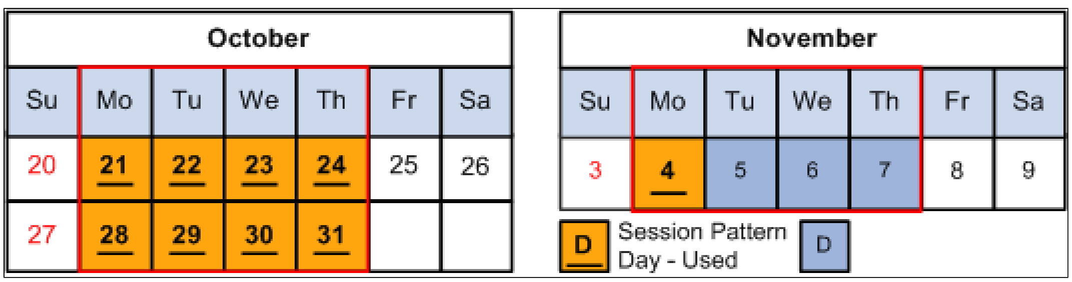


Scenario 2

This table presents requirements for scenario 2:

Parameter	*Value*
Start date	October 21
Number of sessions to create	9
Pattern days	Monday through Thursday
Holidays	N/A

This graphic shows the calendar with the results for scenario 2.

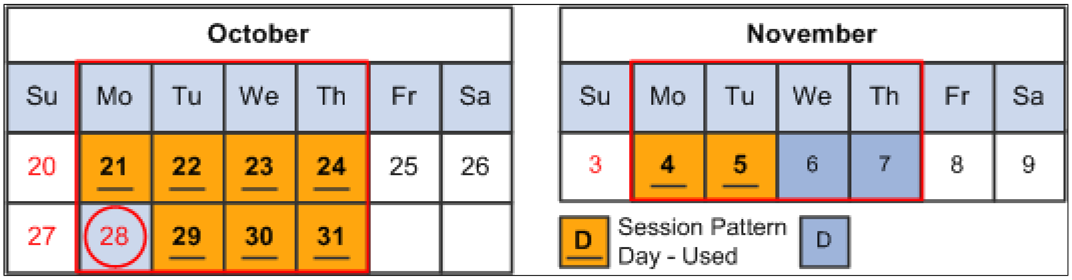


Scenario 3

This table presents requirements for scenario 3. Note that there is a holiday in the session span and holidays must be observed.

Parameter	*Value*
Start date	October 21
Number of sessions to create	9
Pattern days	Monday through Thursday
Holidays	Observe holidays selected. October 28 is a holiday.

This graphic shows the calendar with the results for scenario 3.



Sessions Page

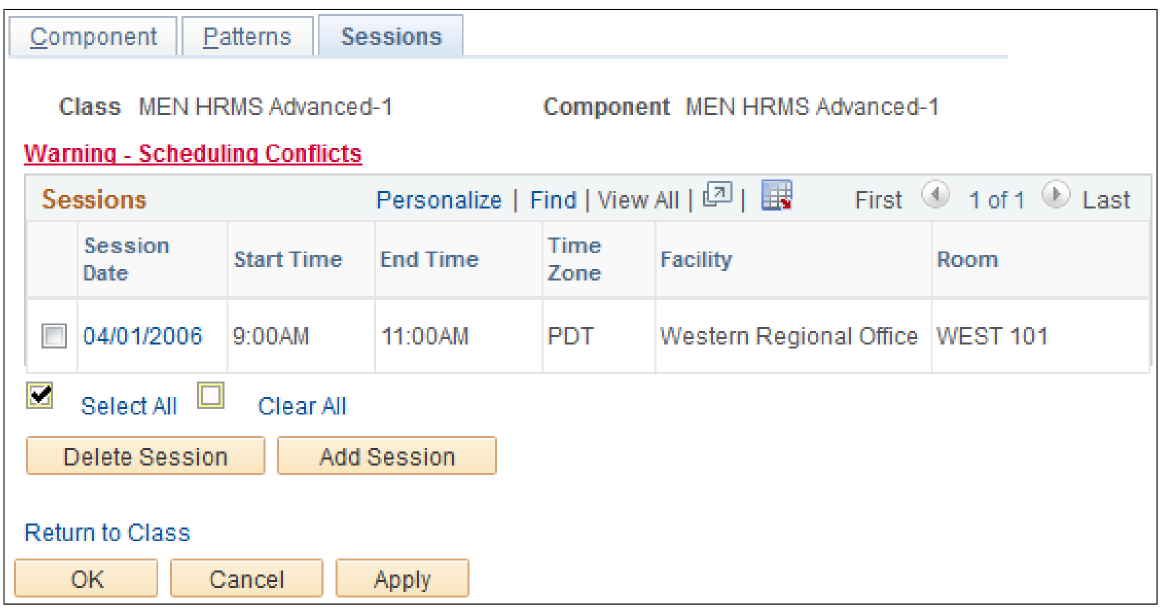
Use the Sessions page (LM_LC_SES_LIST) to view and edit automatically generated sessions.

You can also add and delete sessions.

Navigation:

From the Learning Component page, click the Sessions tab.

This example illustrates the fields and controls on the Sessions page.



When you click the **Build Sessions** button on the Sessions Patterns page, you can view the sessions that the system built from the patterns. You can view session details by clicking the **Session Date** link to go to the Session Details page. You can also create new sessions in the Session Details page by clicking the **Add Session** button.

If any sessions are in conflict within this class or with sessions in another class, a **Warning - Scheduling Conflicts** link appears. Click the link to access the Session Conflicts page.

Session Conflicts Page

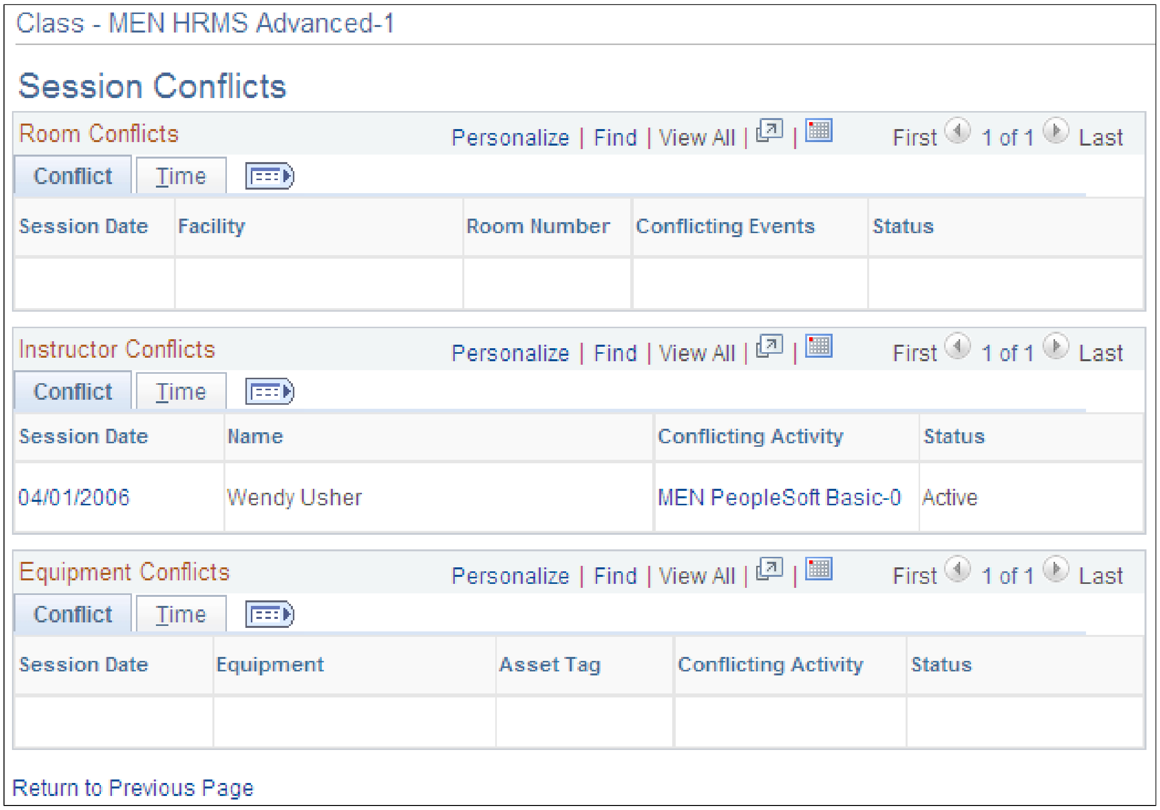
Use the Session Conflicts page (LM_ACT_CNFL) to view sessions that are in conflict.

Click the Session Date link or the Conflicting Class link to access the Session Details page, where you can correct the conflict.

Navigation:

Click the **Warning - Scheduling Conflicts** link on the Sessions page. (This link appears only when sessions are in conflict.)

This example illustrates the fields and controls on the Session Conflicts page.



View session details by clicking the **Session Date, Conflicting Event,** or **Conflicting Class** link. Either link will take you to the Session Details page.

Use the Time tab to have the conflicting time detail displayed. The key fields displayed by the Conflict tab are retained for the Time tab.

Note: You will always see a link to the conflicting session, but you can only navigate to the conflicting session if you have a learning environment that allows such access. You can only edit other sessions for classes that are shared in your learning environment. Room reservations that conflict with your class sessions are displayed in the Room Conflicts group box, but do not have a link in the Conflicting Events column.

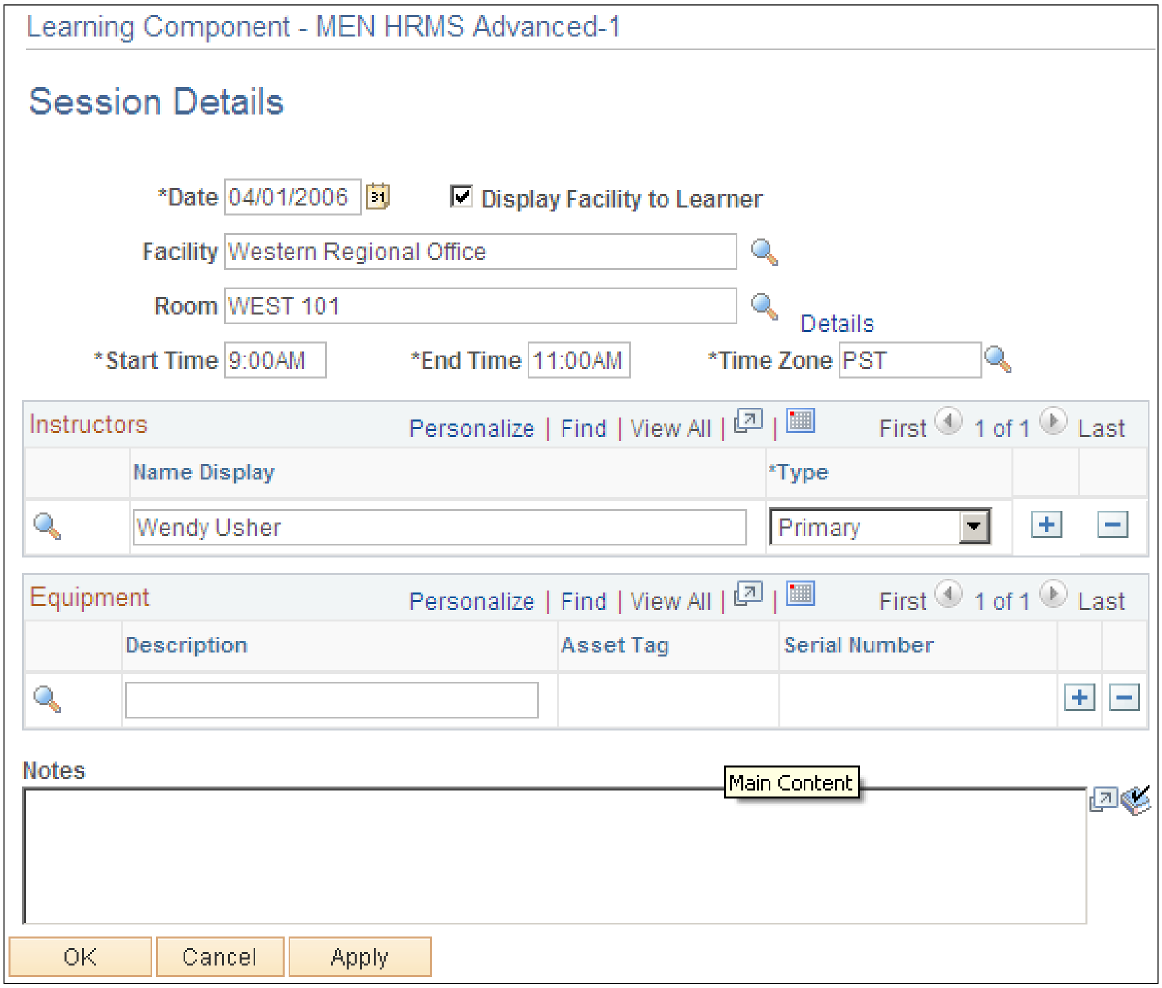
Session Details Page

Use the Session Details page (LM_SES) to modify automatically generated session details, or create new sessions.

Navigation:

Click the **Session Date** link (to view or edit an existing session) or the **Add Session** button (to create a new session) on the Sessions page.

This example illustrates the fields and controls on the Session Details page.



Field or Control	***Description***
Display Facility to Learner	Select to allow learners to view facility information from the self-service Class Details page. If you select this check box, a location link appears in the Scheduled Sessions grid on the Class Details page. Learners can follow this link to view the facilities location, attachment, and accommodations information.
Details	Click to view room details. The Room Detail page appears.

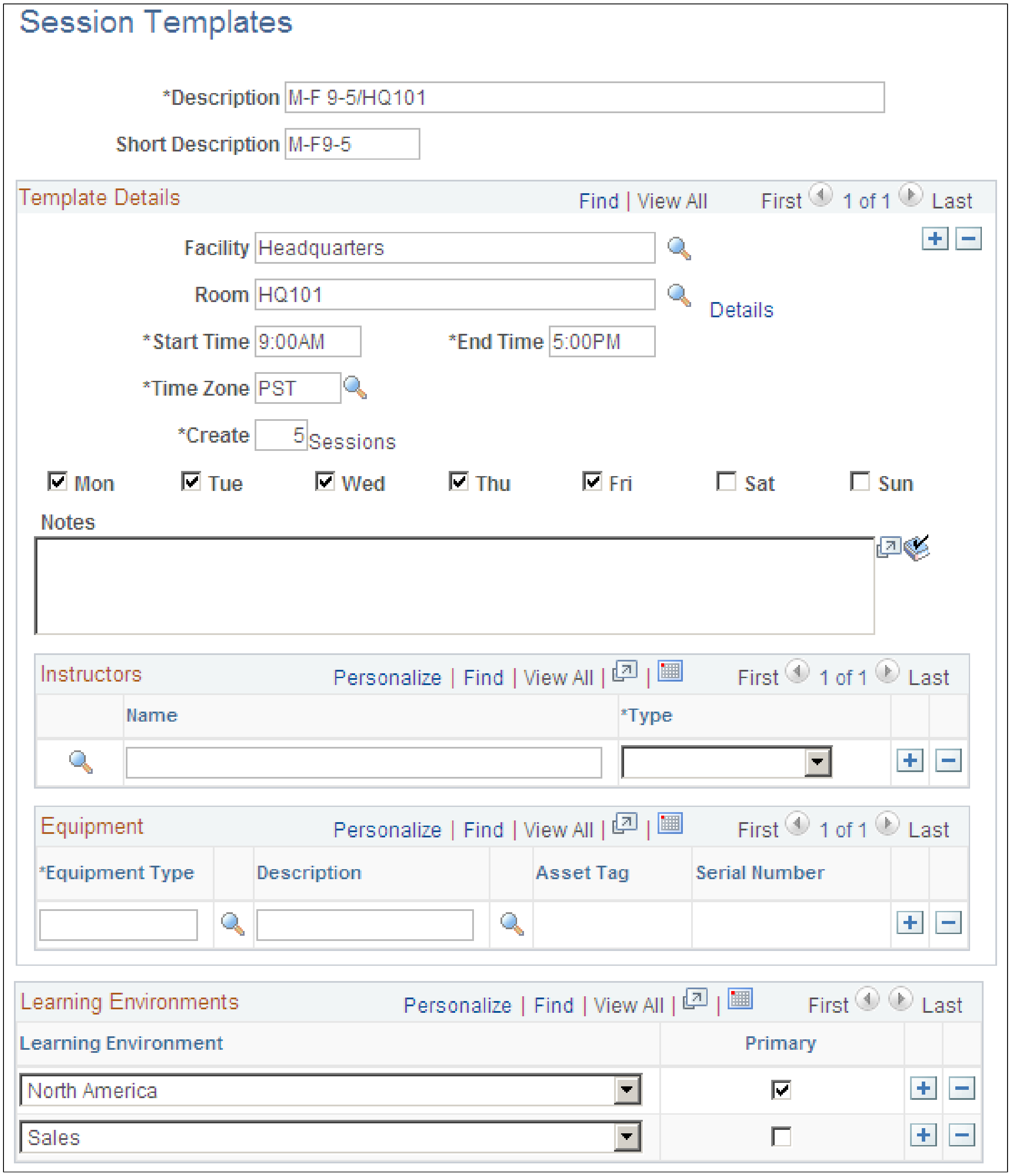
Session Templates Page

Use the Session Templates page (LM_TMPL) to create session templates of common class session characteristics.

Navigation:

Enterprise Learning > **Learning Resources** > **Session Templates**

This example illustrates the fields and controls on the Session Templates page.



This list summarizes the relationship between a session template and a session pattern:

- Whatever you can do on the Patterns page when scheduling a class, you can also do in session templates, except specify a start date.

  Start dates do not appear in templates.

- When you apply a template on the Patterns page when scheduling a class, the template becomes the session pattern just as if you had set the session pattern up directly at the class level.

You can modify the session pattern as required after applying the template.

Creating Webcast Learning Components

To create webcast learning components, use the Maintain Classes (LM_ACT) component.

Pages Used to Create Webcast Learning Components

Page Name	***Definition Name***	***Usage***
Webcast - Component Page	LM_LC_LWC	Create webcast learning components.
Webcast Page	LM_LC_LWC_DTL	Enter webcast details for the learning component.
Patterns Page	LM_LC_PTRN	Create session patterns.
Sessions Page	LM_LC_SES_LIST	View and edit automatically generated sessions.
Webcast Session Details Page	LM_SES	Modify automatically generated session details, or create new sessions.

Understanding Webcast Learning Components

Webcast learning components provide a means to offer instructor-led, virtual-classroom instruction to learners through third-party webcast vendors. When you create a webcast learning component, you define the sessions or session pattern and assign an instructor just like you would in a session learning component.

Related Links

Creating Session Learning Components

Webcast - Component Page

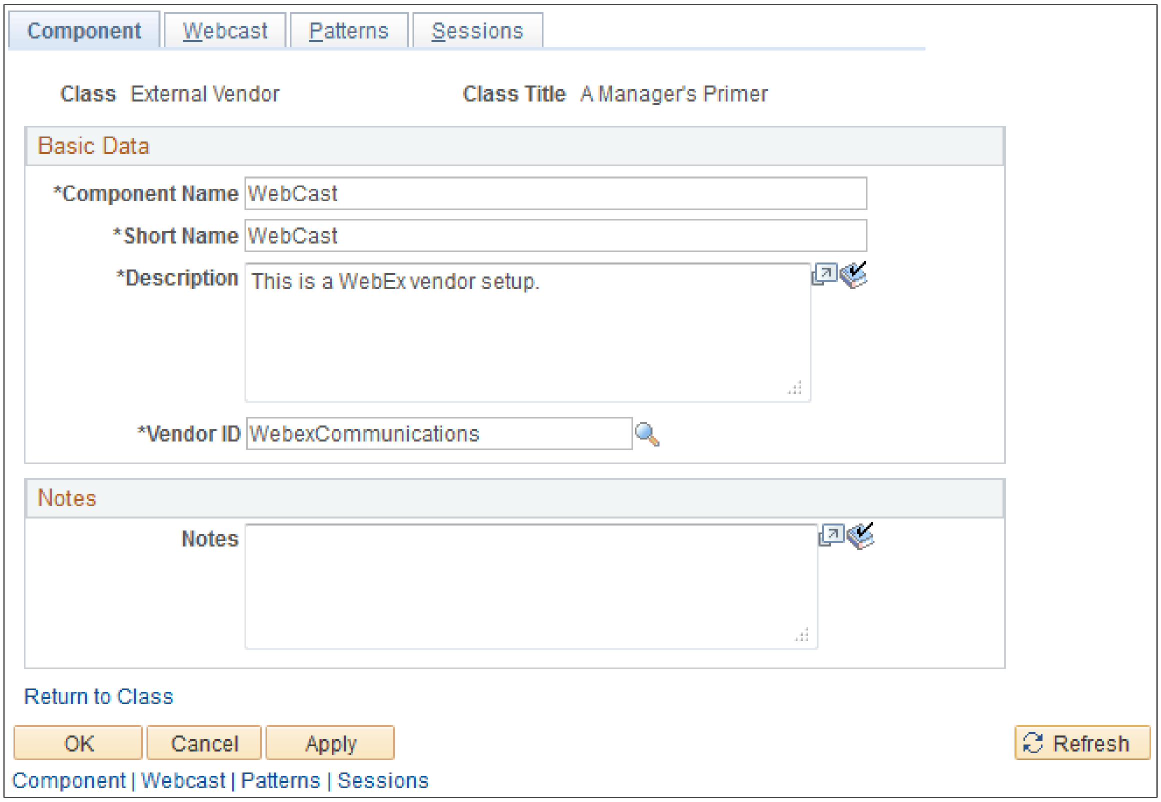
Use the Webcast - Component page (LM_LC_LWC) to create webcast learning components.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Classes** > **Learning Components**

To create a webcast component, click Add Component, and then select Webcast. To edit a webcast component, click Edit.

This example illustrates the fields and controls on the Webcast - Component page.



Field or Control	***Description***
Vendor ID	Enter the ID of the vendor supplying the webcast.

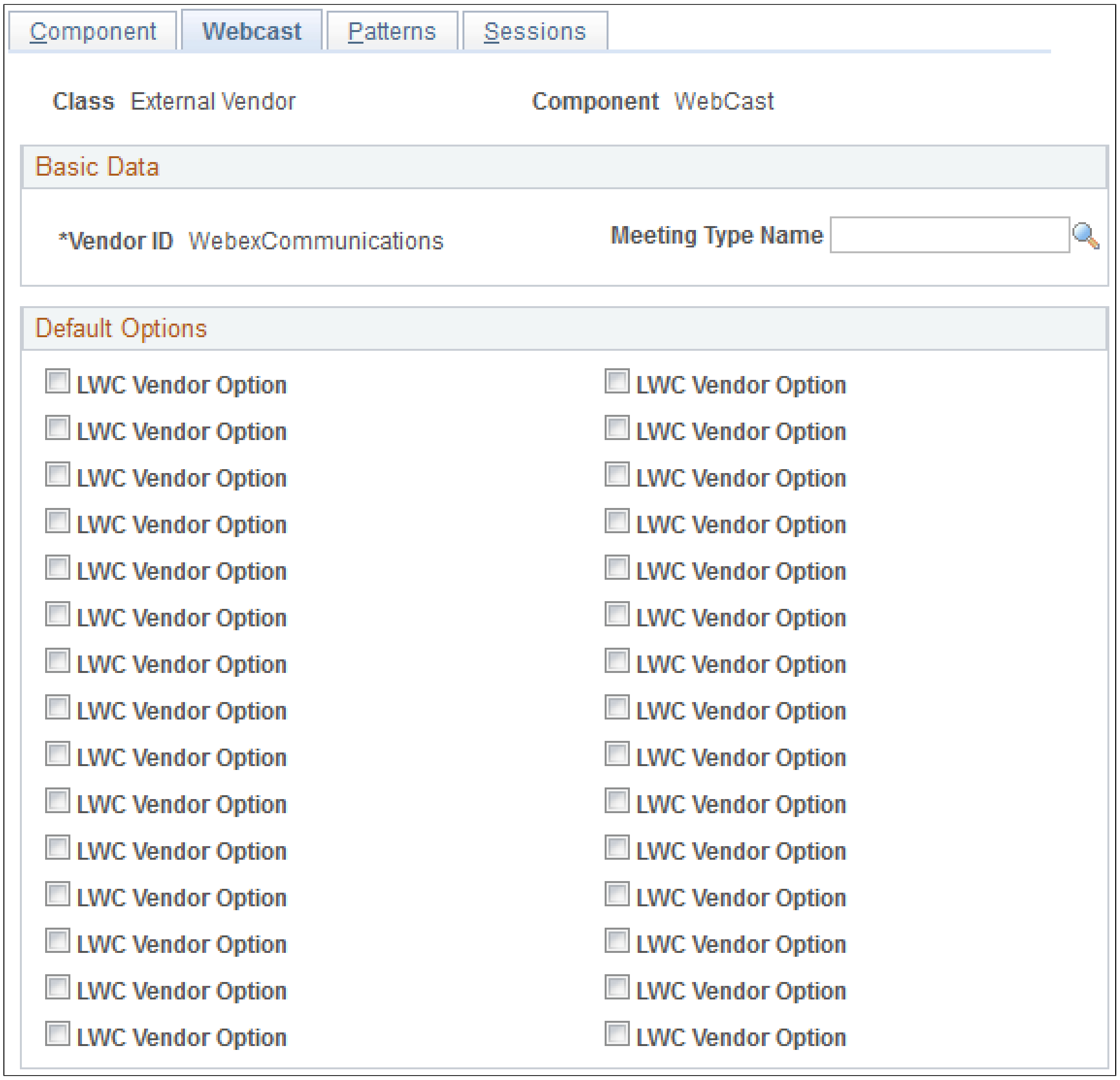
Webcast Page

Use the Webcast page (LM_LC_LWC_DTL) to enter webcast details for the learning component.

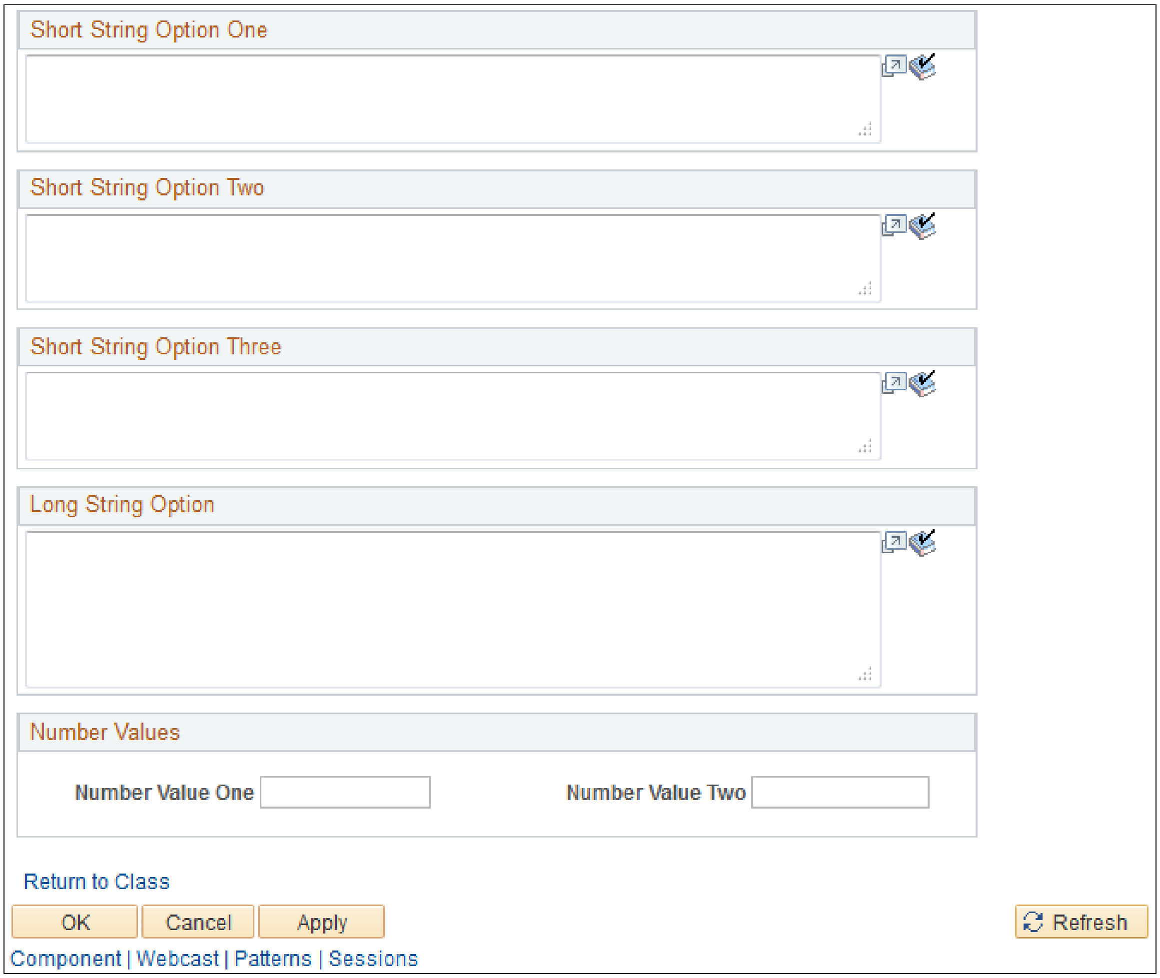
Navigation:

From the Webcast - Component page, select the Webcast tab.

This example illustrates the fields and controls on the Webcast page (1 of 2).



This example illustrates the fields and controls on the Webcast page (2 of 2).



Basic Data

Field or Control	***Description***
Vendor ID	Displays the vendor ID that you selected on the Webcast – Component page.
Meeting Type Name	Select the type of webcast the vendor offers. The vendor provides this information.

Default Options

This group box lists any default options available for the selected vendor ID. A placeholder field of **LWC Vendor Option** appears in this group box for undefined webcast default options.

Patterns Page

Use the Patterns page (LM_LC_PTRN) to create session patterns.

You can base session patterns on a previously defined session template. You use session patterns to generate actual sessions when the session has a repeating pattern.

Navigation:

From the Webcast - Component page, click the Patterns page tab.

This page is identical to the Patterns page used to create session learning components.

See Patterns Page.

Sessions Page

Use the Sessions page (LM_LC_SES_LIST) to view and edit automatically generated sessions.

You can also add and delete sessions.

Navigation:

From the Webcast - Component page, click the Sessions tab.

This page is identical to the Sessions page used to create session learning components.

See Sessions Page.

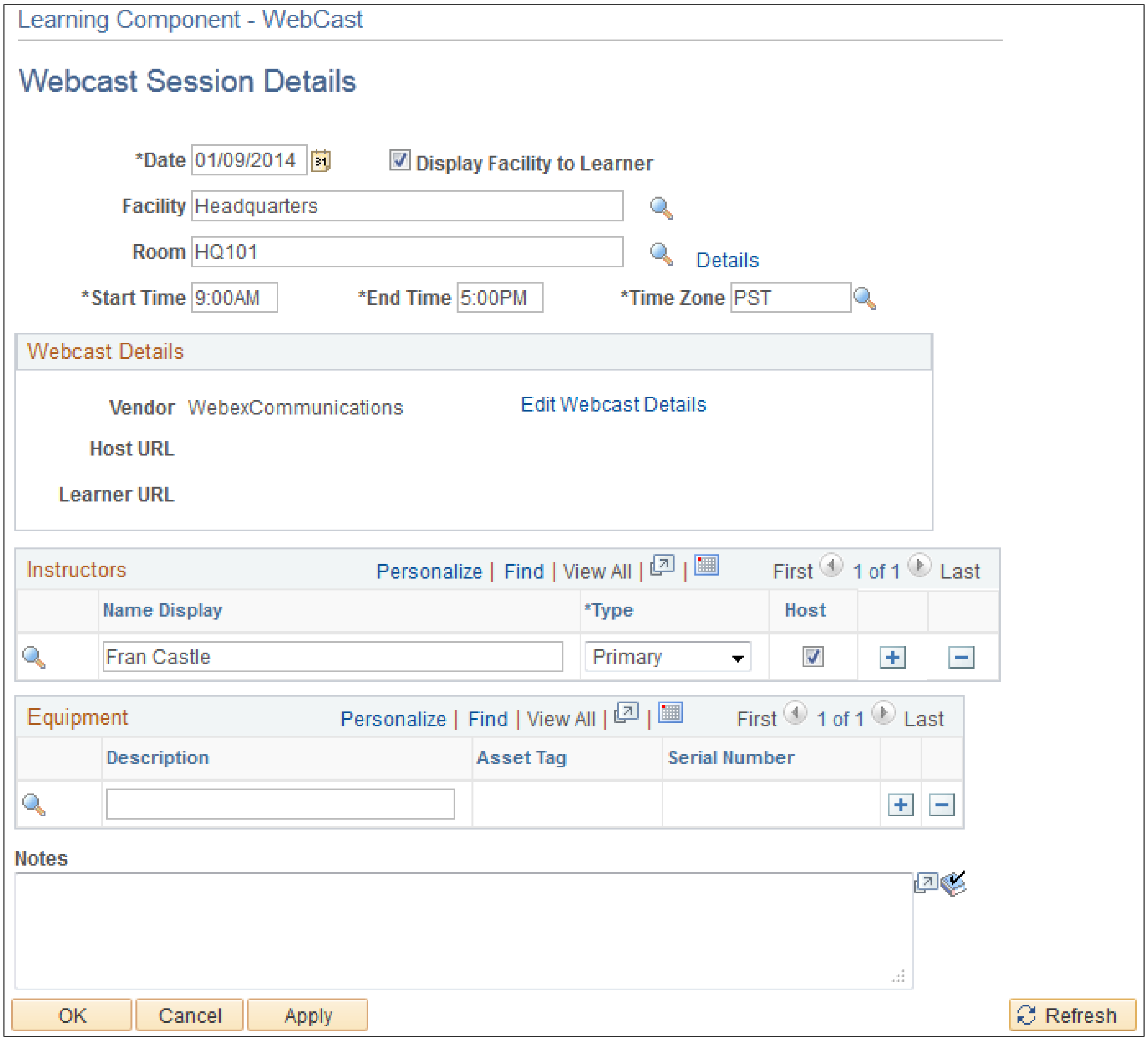
Webcast Session Details Page

Use the Webcast Session Details page (LM_SES) to modify automatically generated session details, or create new sessions.

Navigation:

Click the **Session Date** link (to view or edit an existing session) or the **Add Session** button (to create a new session) on the Sessions page.

This example illustrates the fields and controls on the Webcast Session Details page.



Webcast Details

Field or Control	***Description***
Vendor	Displays the vendor you selected on the Webcast - Component page.
Edit Webcast Details	Click to edit the meeting type name for the webcast.
Host URL	Displays the URL for the webcast host after you publish the session.
Learner URL	Displays the URL for the learner after you publish the session.

Instructors

Field or Control	*Description*
Host	Select this check box to designate the instructor who is the host of the webcast session. This determines which instructor that the system uses when it creates the Host URL.

Note: The remaining fields on this page are identical to those on the Session Details page.

See Session Details Page.

Related Links

Webcast Messages (Session) Page

Publishing Webcast Enrollment and Session Information to Vendors

To publishing webcast enrollment and session information to vendors, use the Vendor Message Management (LM_LELW_MSG_LOG) component.

Pages Used to Manage Webcast Enrollment

Page Name	*Definition Name*	*Usage*
Vendor Message Management - Search Page	LM_LELW_BAT_SRCH	Search for session and enrollment messages that are queued to be sent to your webcast vendor.
Webcast Messages (Session) Page	LM_LELW_MSGSS_LOG	View and publish webcast learning component session messages.
Webcast Messages (Enrollment) Page	LM_LELW_MSG_LOG	View and publish webcast learning component enrollment messages.

Understanding Publishing Webcast Information to Vendors

When administrators schedule webcast learning components, or when learners enroll in a class that includes a webcast learning component, the system adds the schedule information into a batch table for webcasts. You can view this information and publish it to webcast vendors by using the Maintain Vendor Messages component. Messages for new webcast sessions appear on the Webcast Messages (Session) page, and messages for enrollments into those sessions appear on the Webcast Messages (Enrollment) page. For example, when you schedule five sessions for a webcast learning component, five session messages appear on the Webcast Messages (Session) page. If you enroll three learners into the class that contains this webcast learning component, 15 enrollment messages appear on the Webcast Messages (Enrollment) page. When you add sessions to a webcast learning component after learners have already enrolled in the class that contains that learning component, the system adds the schedule information into the batch table for both sessions and enrollments and the messages appear on both the Webcast Messages (Session) and Webcast Messages (Enrollment) pages.

Depending on when you have scheduled the process to run, the Webcast Messages Application Engine (LM_LELW_AE) process batches webcast schedules and the learners' names and publishes them to the vendor's webcast system. Schedule the Webcast Messages process to run from **PeopleTools** > **Application Engine** > **Request AE.**

If an error occurs while publishing information to your vendor, you can view the messages on the Maintain Vendor Messages page. From here, you can review the errors and again publish the individual messages after the errors are corrected.

Learners must access the webcast through your system. They cannot go directly to the vendor site to launch the webcast. When a learner enrolls in a class in Enterprise Learning Management that contains a webcast learning component, the system creates a randomly generated, internal password for the learner. The system uses this information to create the learner's profile on the vendor site. When the learner launches the webcast from Enterprise Learning Management, he or she accesses the vendor's site using the automatically generated password. This happens in the background; the learner does not need to enter the password to access the vendor's site.

Webcast learning component completion rules vary slightly depending on the vendor you choose.

See the vendor-specific companion documentation posted to My Oracle Support.

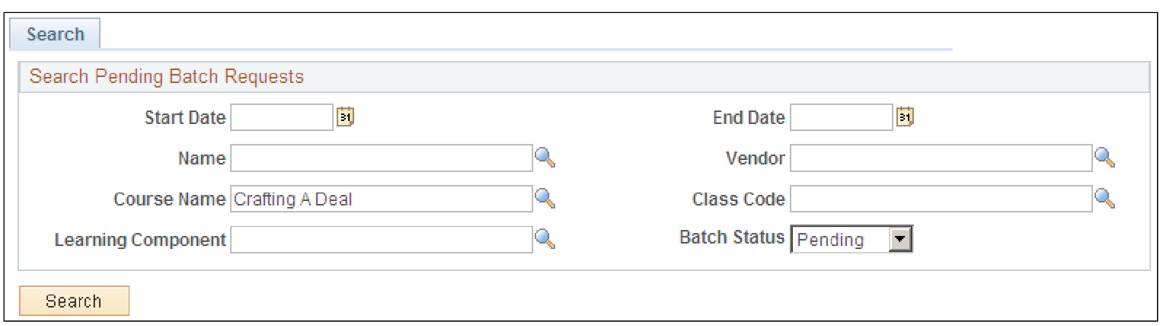
Vendor Message Management - Search Page

Use the Vendor Message Management - Search page (LM_LELW_BAT_SRCH) to search for session and enrollment messages that are queued to be sent to your webcast vendor.

Navigation:

Enterprise Learning > **Vendor Message Management**

This example illustrates the fields and controls on the Vendor Message Management - Search page.



Enter search criteria to search for pending enrollment and session messages that are queued to be sent to the webcast vendor. Click Search to be taken to the Webcast Messages (Session) page.

Note: You must publish session information to vendors before you publish enrollment messages, so ensure that all session messages have been successfully published before publishing enrollment messages.

Webcast Messages (Session) Page

Use the Webcast Messages (Session) page (LM_LELW_MSGSS_LOG) to view and publish webcast learning component session messages.

Navigation:

Enterprise Learning > **Vendor Message Management** > **Webcast Messages (Session)**

Select the messages you want to publish and click the **Publish** button. If the message is published successfully to the vendor, the status changes from pending to success and the selected check box becomes unavailable. Also, the next time you enter the page, messages that were published successfully are no longer visible.

If a message is not published successfully, the status changes to error. The status then becomes a link that you can click to view the error message. In this case, you must correct the error and publish the message again.

Note: Enterprise Learning Management only performs its own logic checks when creating or deleting webcast sessions, or when enrolling learners in or dropping learners from webcast sessions. It does not perform logic checks based on rules established in the webcast vendor's system. The webcast vendor performs its own logic checks after session and employee messages have been published. Therefore, it is possible to successfully publish session and enrollment information that does not match the vendor's rules.

Creating Assignment Learning Components

To create assignment learning components, use the Messages (LM_LELW_MSG_LOG) component.

Assignment learning components can be anything from an on the job training task with a mentor to a meeting with a manager. Assignments enable you to include ad hoc tasks in a class.

Page Used to Create Assignment Learning Components

Page Name	***Definition Name***	***Usage***
Assignment Component Page	LM_LC_ASGN	Create or edit an assignment learning component.

Assignment Component Page

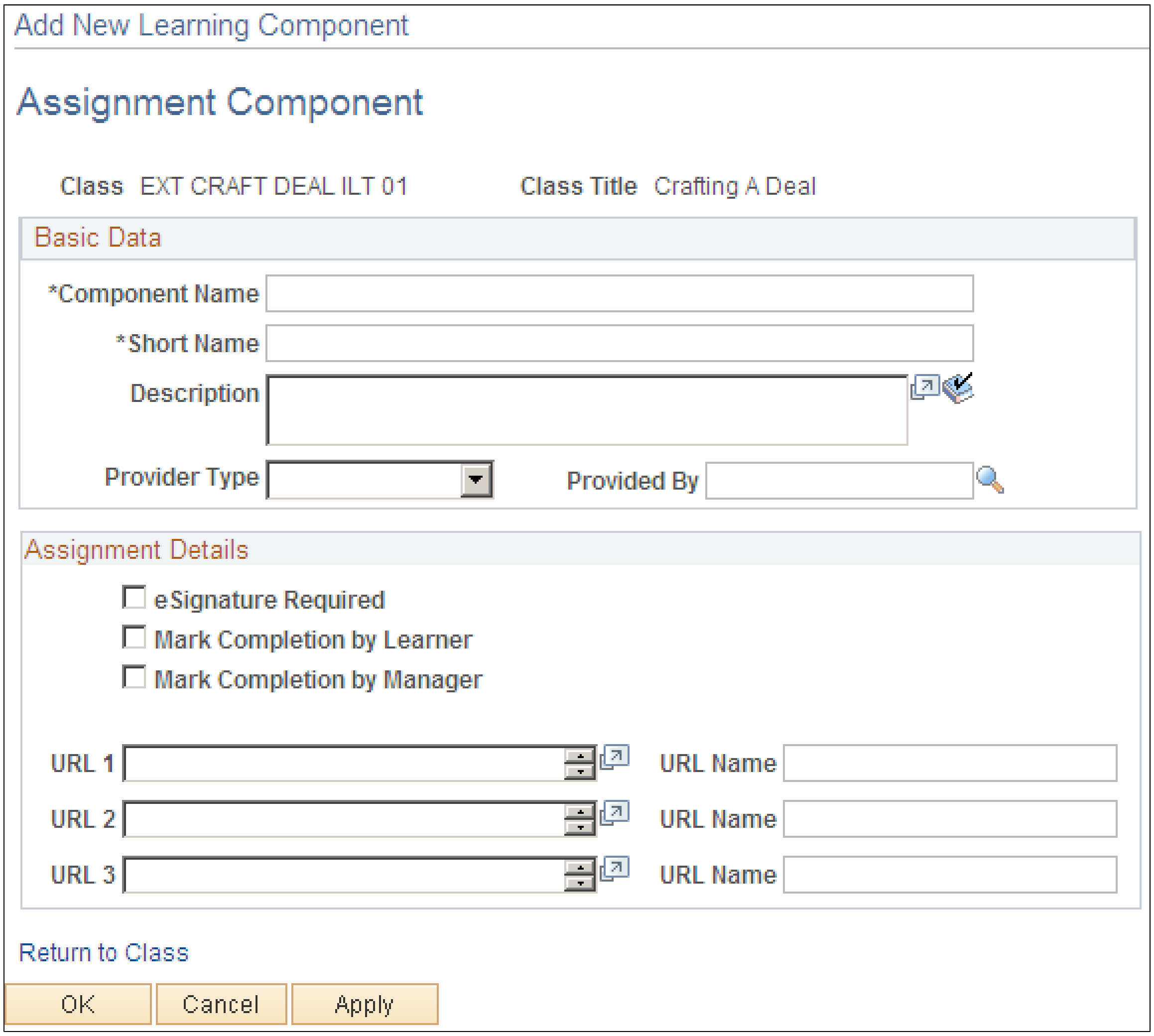
Use the Assignment Component page (LM_LC_ASGN) to create or edit an assignment learning component.

Navigation:

Enterprise Learning, Catalog, Maintain Classes, Learning Components

To create an assignment component, click Add Component and then select Assignment. To edit an assignment, click Edit.

This example illustrates the fields and controls on the Assignment Component page.



Field or Control	***Description***
eSignature Required	This field works in conjunction with the **Mark Completion by Learner** field. If you enable learners to update the completion status for this assignment, you can require that they enter their passwords when changing the status to complete.
Mark Completion by Learner	Select to enable learners to update the completion status for this assignment. If you also select the **Mark Completion by Manager** check box, both the learner and the manager can update the status. (Learners can use the self-service Class Progress page to update the status.)

Field or Control	***Description***
Mark Completion by Manager	Select to enable the learner's manager to update the completion status for this assignment. If you also select the **Mark Completion by Learner** check box, both the learner and the manager can update the status. (Managers can use the self-service Class Progress page to update the status.) Instructors and administrators for the related class always have the ability to update the completion status for an assignment through the class's Component Roster page for that assignment.
URL 1 and **URL 2** and **URL 3**	Enter up to three URLs for this component. These links can point to regular web-based documents, such as HTML and PDF files. These links cannot point to SCORM or AICC compliant content. To create a learning component that is SCORM or AICC compliant, use the web-based learning component. See Creating Web-Based Learning Components.
URL Name	Enter the name that you want to appear next to the URL on the page. For example, if you enter *http://www.peoplesoft.com* in the **URL 1** field, you could enter *PeopleSoft's Website* in the corresponding **URL Name** field. The system displays both the URL and the URL name to learners.

Chapter 19

Setting Up and Using Class Templates

Understanding Class Templates

This topic discusses:

- Purpose of class templates.
- Methods of creating classes.
- Class template setup and use.

Purpose of Class Templates

Class templates enable you to enter catalog information into the Enterprise Learning Management system using a single component.

Using class templates you can:

- Rapidly create a new course or class, or update a class for an existing course.

  For example, an instructor can use a template to quickly create a class, so that a group of IT employees can enroll in training. The instructor can define the course attributes manually, or load the content and course information into the template from an external file.

- Create multiple courses and classes in one processing instance.

  For example, a training administrator can use a template to create a large number of classes by populating a specific template format with course content from one or more external files. This is particularly useful when the administrator needs to load catalog content from a third party provider into Enterprise Learning Management, or the administrator of an external content server needs to push hundreds of content files from the server into the PeopleSoft system.

Methods of Creating Classes

Enterprise Learning Management provides two ways to create classes:

- Manually define categories, courses, delivery methods, and classes using the following separate components:
  - Maintain Categories (LM_CATG_LA_CMP)
  - Maintain Courses (LM_CI_LA_CMP)
  - Maintain Delivery Methods (LM_DMTHDS_LA_GBL)

    - Maintain Classes (LM_ACT)

- Manually define class templates and use them to create classes through a single component.

  There are two processes for defining classes based on class templates:

    - Quick Create Classes

      This process enables you to define single courses and classes.

      The Quick Create Classes process uses templates to create data-entry pages that bring together a subset of group boxes and fields from the Maintain Courses (LM_CI_LA_CMP), Maintain Delivery Methods (LM_DMTHDS_LA_GBL) and Maintain Classes (LM_ACT) components that are needed to define courses, delivery methods, and classes. When you set up a template, you identify the group boxes and fields that are relevant to the type of class you are defining, and the resulting data-entry page prompts you to enter values only for the selected fields. You can enter these values into the page manually, or import them from an external file, without having to access multiple components to define a class.

    - Automated Catalog Import

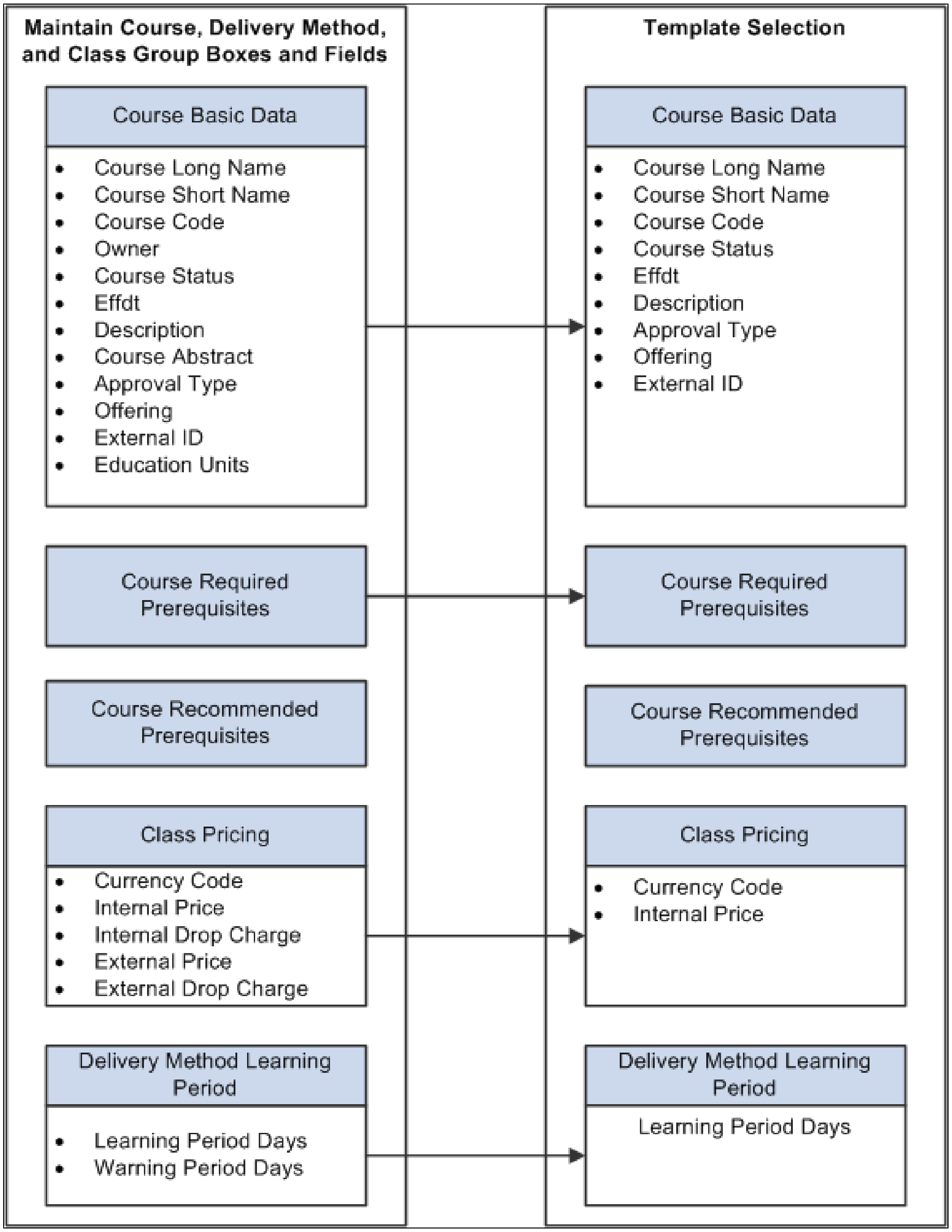
      This process enables you to import multiple courses and classes down to the component level, from external files in one processing instance.

      In this process you use templates to select and format the catalog data that you want to import into the system. Just as in the Quick Create Classes process, the class template brings together a subset of group boxes and their associated fields from the Maintain Courses (LM_CI_LA_CMP), Maintain Delivery Methods (LM_DMTHDS_LA_GBL), and Maintain Classes (LM_ACT) components that are needed to define courses. This process uses templates to filter and structure the data contained in the external files so that only the required information makes it into the database; it also uses templates to create data-entry pages that you can use to view and modify the imported data.

Note: In both of these processes, the data-entry page generated from the template provides a way to access fields on the Maintain Courses, Maintain Delivery Methods, and Maintain Classes components without having to navigate to numerous different pages. You can, however, access these components to view or modify class and catalog data that you enter into the system using either the Quick Create Classes process or the Automated Catalog Import process.

Creating a Template By Selecting Group Boxes and Fields

This diagram illustrates how you create template-based pages by selecting group boxes and fields from different class definition components to produce a single point of data entry.



Class Template Setup and Use

To set up a class template:

1. On the Template Setup page:

    - Define the template name.

- Define the name of the data-entry page to generate from the template.
- Select the group boxes from the Maintain Courses (LM_CI_LA_CMP), Maintain Delivery Methods (LM_DMTHDS_LA_GBL), and Maintain Classes (LM_ACT) components to include on the data-entry page. You can rename these group boxes based on the naming conventions used by your organization.

2. For each group box selected in step 1, use the Template Framework – Section Details page to define the rules for the fields contained in that group box.

   You have the ability to:

   - Make fields available for data entry.

     If you make a field available for data entry, you can instruct the system to display a starting value in that field, leave the field blank, or display the default value entered in component that is the source of the group box. You can then override the displayed value.

   - Make fields display-only.

     If you make a field *display-only,* you can instruct the system to display a specific value in that field, leave the field blank, or display the default value entered in component that is the source of the group box.

     Note: If you make a field display-only that is required and for which there is no default value, you will not be able to save the new class when using the template on the Quick Create Classes or Catalog Import components. Consider this carefully when using the display-only option.

   - Hide fields so that they do not appear on the template-based data-entry page.

     Note: If you hide a field that is required and for which there is no default value, you will not be able to save the new class when using the template on the Quick Create Classes or Catalog Import components. Consider this carefully when using the hide option.

   - Define required fields.

3. Use the Template Framework – Template Security page to define security for the data-entry page.
4. Preview the data-entry page based on the template and make any necessary corrections.

   To do this, click the Preview Page button on the Template Setup page.

To create a single class using a template-based page (Quick Create Class Process) :

1. Access the Quick Create Classes page and select one of the following options:

   - *Import Catalog Data*

     This option enables you to upload a file containing the course content data, and them import the data into the template-based page.

     If you select this option, you must:

a) Select and upload the file containing the course data.

b) Identify the file format of the file(s) containing the catalog content.

Valid file types are AICC, PeopleSoft XML Format, SCORM 1.2, and SCORM 2004, Edition 4.

- *Manually Quick Create*

  If you select this option, you can enter all of the data needed to create a course, delivery method, and class into the template–based page manually, or pull data for existing courses and delivery methods into the template, and manually add class information.

2. Access the template-based page and review or update the class data.
3. Access the Rebuild Indexes page and rebuild the search collection.

To create multiple courses and classes in one processing instance (Catalog Import Process):

1. Access the Catalog Import page and enter the following information:
   - File format of the file(s) containing the catalog content.

     Recognized formats are AICC, PeopleSoft XML Format, SCORM 1.2, and SCORM 2004, Edition 4.
   - Name of the template that you are using to load data into the system.
   - Location of the file(s) containing the catalog content.

   Note: You can load a single file or multiple files.

2. Run the Catalog Import process.

   To do this, click the Load button on the Catalog Import page.
3. Access the Rebuild Indexes page and rebuild the search collection.

Prerequisites for Class Templates

Before performing the first import of classes from an external source, run the Datamapping Sync Application Engine process (HRS_DM_SYNC) to synchronize the data mapping tables.

If you have updated the data mapping, run the process again to make sure that the tables are synchronized before importing classes. You should run the data mapping process periodically depending on how often you add records to any of the categories that are used for data mapping.

See Synchronizing Data Mapping Tables.

Defining Class Templates

To define class templates, use the Class Templates (LM_TMPL_SETUP) component.

Pages Used to Define Class Templates

Page Name	***Definition Name***	***Usage***
Template Setup Page	LM_TMPL_SETUP	• Define basic template information such as the template name and the name of the data entry page to generate from the template. • Select the group boxes from the Maintain Courses, Maintain Delivery Methods, and Maintain Classes components to include on the data-entry page.
Template Framework - Section Details Page	LM_TMPL_SETUP_OBJ	Define behavior of the fields on the data-entry page generated from the template.
Template Security Page	LM_SEC_TMPL	Define security for the template.

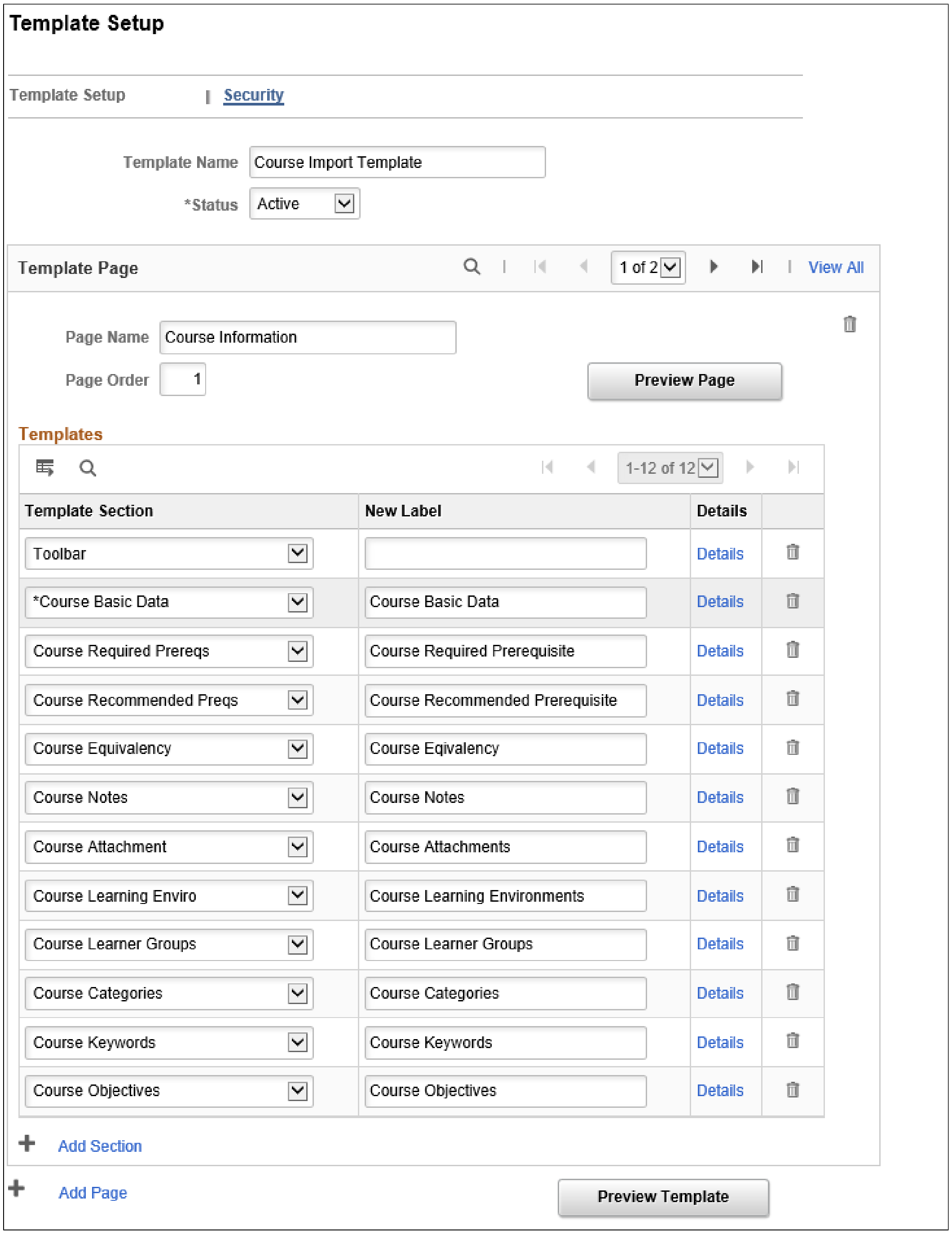
Template Setup Page

Use the Template Setup page (LM_TMPL_SETUP) to define basic template information such as the template name and the name of the data entry page to generate from the template. Use this page to also select the group boxes from the Maintain Courses, Maintain Delivery Methods, and Maintain Classes components to include on the data-entry page.

Navigation:

Set Up ELM > **Catalog** > **Class Templates** > **Template Setup**

This example illustrates the fields and controls on the Template Setup page.



Field or Control	***Description***
Template Name	Specify a name for the template.
Status	Select *Active* or *Inactive.*

Template Page

Use the fields in the Template Page group box to select the group boxes and their associated fields from the Maintain Courses (LM_CI_LA_CMP), Maintain Delivery Methods (LM_DMTHDS_LA_GBL), and Maintain Classes (LM_ACT) components that you want to consolidate into a single data-entry page for defining classes. The sections in the **Template Section** column are the group boxes containing the fields. You determine which fields to include from each group box (section) by clicking the **Details** link and defining the field behavior.

Field or Control	***Description***
Page Name	Specify the name of the data-entry page to generate from the template.
Page Order	You can divide the template into multiple pages, with one or more group boxes (sections) on each page, or place all group boxes and their associated fields on a single long page. If you divide the template into multiple pages, indicate the relative order of the pages in the **Page Order** field. **Note:** To create a multi-page template, click the **Add Page** link.
Template Section	Select the group boxes (template sections) that will appear on the data-entry page. The available group boxes are from the Maintain Courses (LM_CI_LA_CMP), Maintain Delivery Methods (LM_DMTHDS_LA_GBL), and Maintain Classes (LM_ACT) components. Once you have selected the group boxes you want to include in the template, you can configure each section at the field level by clicking the **Details** link. **Note:** The group boxes marked with an asterisk contain required fields. If you create a template that does not include one of these group boxes, the system issues the following warning: *These Sections with required fields are not in this template definition: <List of Required Sections>*. In addition, if a required field is not included in a template, you will not be allowed to save new classes when you use the template on the Quick Create Classes or Catalog Import components.
New Label	Enter a custom label for the group box that will appear on the template-based page.
Details	Click to access the Section Details page.

Field or Control	*Description*
Add Section	Click to add a new group box (section) to the page.
Add Page	Click to divide the template into multiple pages.
Clone	Click to copy the template under a new **Template Name.**
Preview Page	Click to preview a specific data-entry page that you will generate from the template.
Preview Template	Click to preview all of the pages that you will generate from the template.

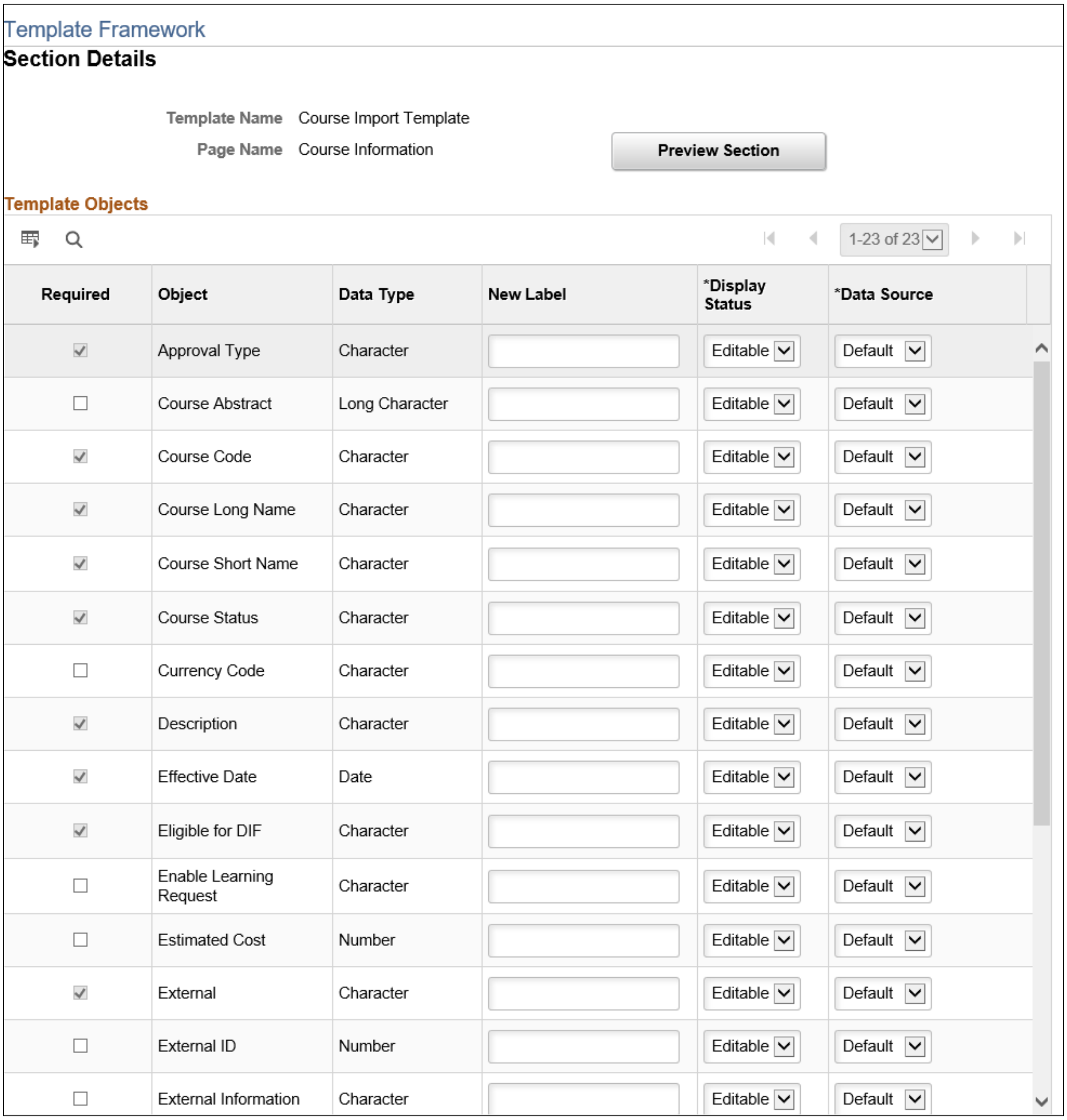
Template Framework - Section Details Page

Use the Template Framework - Section Details page (LM_TMPL_SETUP_OBJ) to define behavior of the fields on the data-entry page generated from the template.

Navigation:

Click the**Details** link next to a group box (template section) on the Template Setup page.

This example illustrates the fields and controls on the Template Framework - Section Details page.



Template Framework

Section Details

Template Name Course Import Template

Page Name Course Information

Preview Section

Template Objects

1-23 of 23

Required	Object	Data Type	New Label	*Display Status	*Data Source
☑	Approval Type	Character		Editable	Default
☐	Course Abstract	Long Character		Editable	Default
☑	Course Code	Character		Editable	Default
☑	Course Long Name	Character		Editable	Default
☑	Course Short Name	Character		Editable	Default
☑	Course Status	Character		Editable	Default
☐	Currency Code	Character		Editable	Default
☑	Description	Character		Editable	Default
☑	Effective Date	Date		Editable	Default
☑	Eligible for DIF	Character		Editable	Default
☐	Enable Learning Request	Character		Editable	Default
☐	Estimated Cost	Number		Editable	Default
☑	External	Character		Editable	Default
☐	External ID	Number		Editable	Default
☐	External Information	Character		Editable	Default

For each group box (section) selected on the Template Setup page, set up field level details on the Template Framework - Section Details page.

Field or Control	***Description***
Required	Select *Required* if a value must be entered for this field when using the template. **Note:** Fields that are required on the source component will default to being required on the template. You cannot override these defaults on the Template Framework – Section Details page.

Field or Control	***Description***
Object and Data Type	These fields display the name and type of the field.
New Label	Enter a custom field name that will replace the object field name on the template-based page.
Display Status	Indicates if the field is visible on the template-based page, and if it can be edited: Valid values are: • *Editable:* The field will appear on the page, and can be modified by the user. • *Invisible:* The field will not appear on the page. **Note:** If you hide a field that is required and for which there is no default value, you will not be able to save new classes when using the template on the Quick Create Classes or Catalog Import components. Consider this carefully when selecting the *Invisible* option. • *Viewable:* The field will appear on the page, but will be read-only. **Note:** If you make a field viewable that is required and for which there is no default value, you will not be able to save new classes when using the template on the Quick Create Classes or Catalog Import components. Consider this carefully when selecting the *Viewable* option.
Data Source	Specify the starting value of the field. Select one of the following: • *Blank:* The field will have no starting value. • *Default:* The field will appear with the default value entered in the source component. • *Value:* The field will have the value specified in the **Custom Data** field.
Custom Data	This field appears only if you select *Value* in the **Data Source** field. Specify the starting value of the field in this column.
Preview Section	Click to view the section as it will appear on the data-entry page generated from the template.

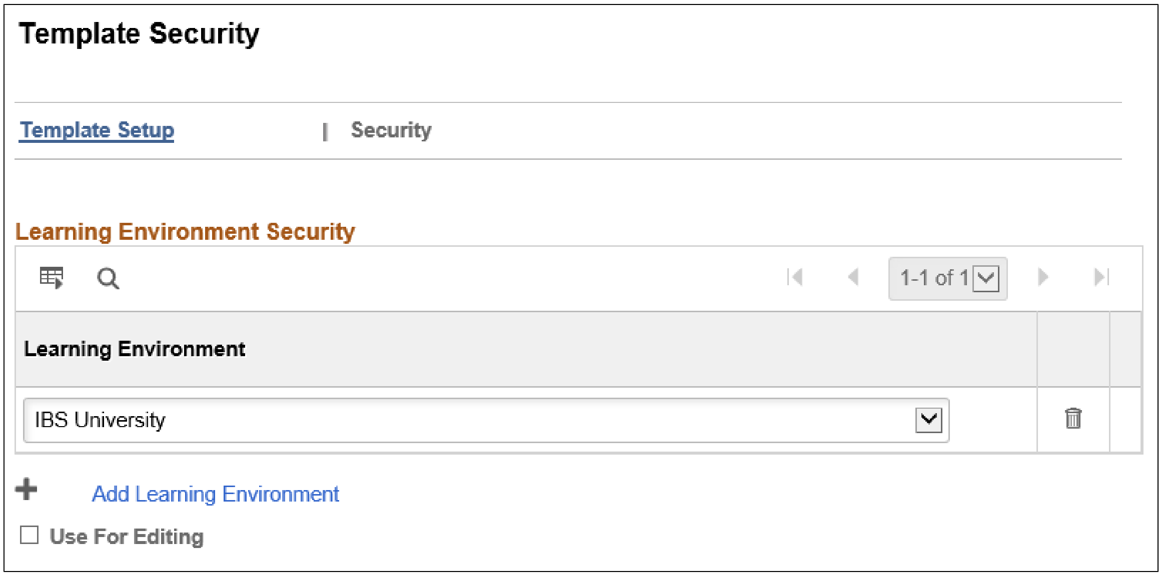
Template Security Page

Use the Template Security page (LM_SEC_TMPL) to define security for the template.

Navigation:

Click the **Security** link on the Template Setup page.

This example illustrates the fields and controls on the Template Security page.



Field or Control	***Description***
Learning Environment	Specify the learning environments that will have access to this template to create classes.
Use For Editing	This field controls whether the template can be used for updating an existing course, delivery method, or class, or can only be used to create new courses, delivery methods, or classes. If you select the **Use For Editing** check box, then the template is available both for updating and creating new catalog structure components.

Creating a Quick Class Using a Template

Page Used to Define a Quick Class Using a Template

Page Name	***Definition Name***	***Usage***
Quick Create Classes Page	LM_CNT_TMPL_LAUNCH	Create a single class by loading class and catalog data from an external file, or by defining the data manually.
Content Template - <Template Name> Page	LM_CT_PAGE	View and edit the data on the data-entry page generated from a class template.

Understanding Quick Classes

After defining a template, you can use it to rapidly create classes. You can use existing courses, delivery methods, or classes as the basis for defining a new class, or you can define all new information using the template.

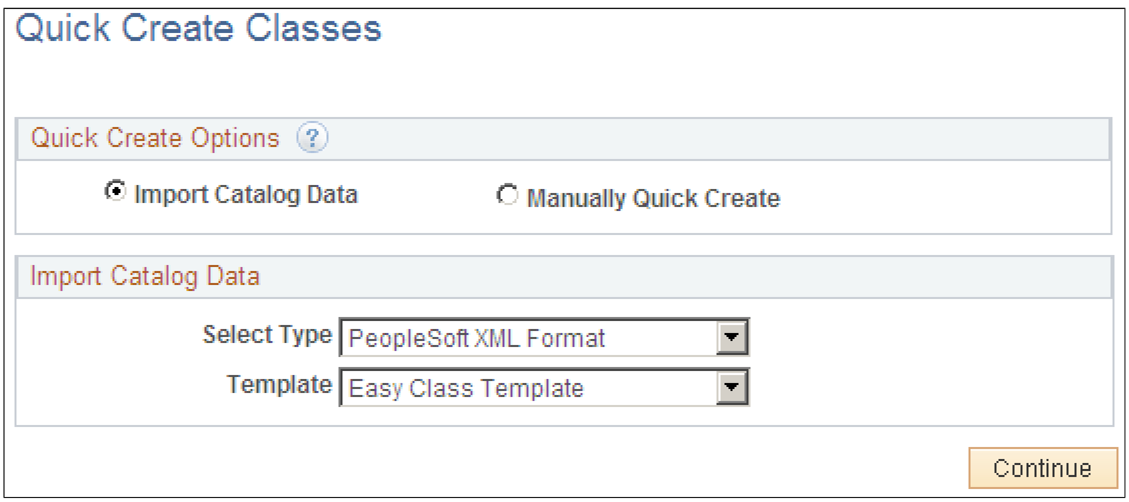
Quick Create Classes Page

Use the Quick Create Classes page (LM_CNT_TMPL_LAUNCH) to create a single class by loading class and catalog data from an external file, or by defining the data manually.

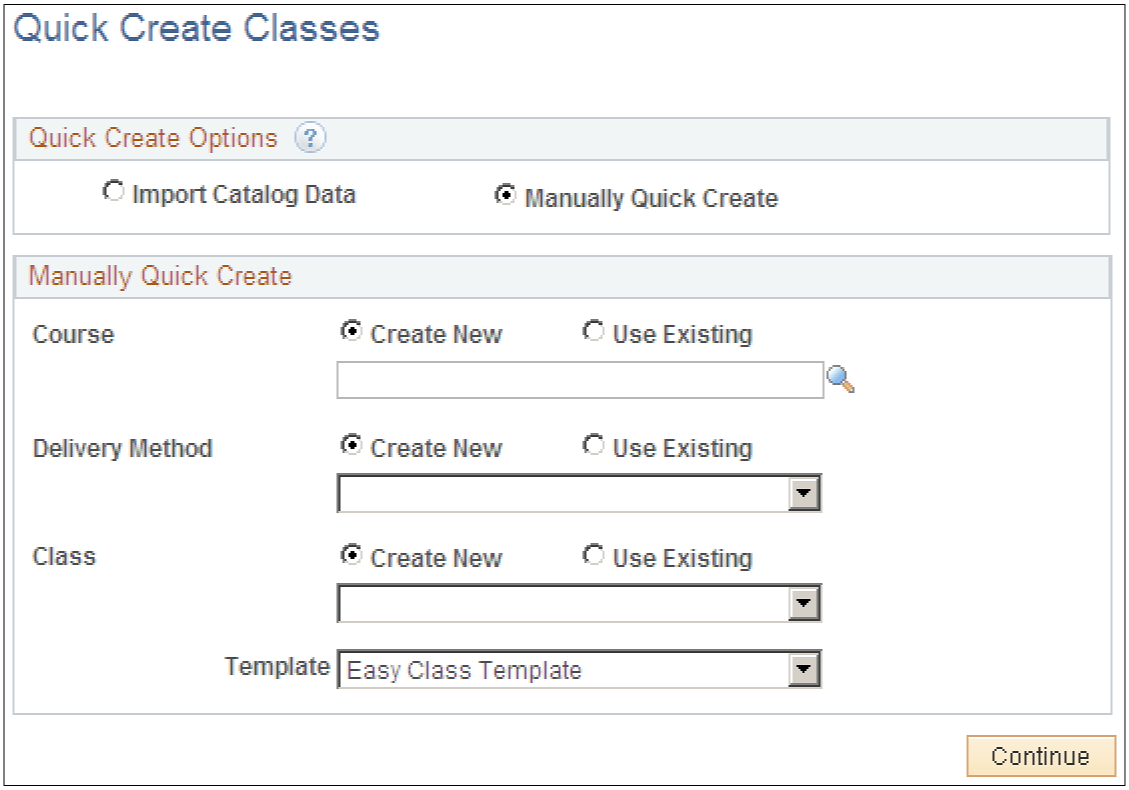
Navigation:

Enterprise Learning > **Catalog** > **Quick Create Classes** > **Quick Create Classes**

This example illustrates the fields and controls on the Quick Create Classes page with Import Catalog Data Selected.



This example illustrates the fields and controls on the Quick Create Classes page with Manually Quick Create Selected.



Quick Create Options

Valid values are:

- *Import Catalog Data*

  Select this option to import class and catalog data into the system from an external file.

  If you select *Import Catalog Data,* you must specify the type of file containing the data and the template you want to use to filter and format the data contained in the file.

- *Manually Quick Create*

  Select this option to manually create classes.

  If you select *Manually Quick Create,* indicate whether you will be creating a new course, delivery method, and class, or using an existing item, method, or class as the basis for defining a class. If you use existing data, specify the existing item, method, or class definition, and the system will populate the data-entry page with this definition when you click **Continue.**

Note: If you select *Use Existing,* you can modify or update the existing definitions for the selected course, delivery method, and class on the Content Template - <Template Name> page.

Import Catalog Data

This group box appears only when the Quick Create Option is *Import Catalog Data.*

Field or Control	Description
Select Type	Select the type of file containing the data. Valid file types are: • *AICC* • *PeopleSoft XML Format* • *SCORM 1.2* • *SCORM 2004*
Template	Select one of the templates you defined on the Template Setup page. The system populates the template fields with data in the external file when you click **Continue** and upload a file. **Note:** You must specify a template before you can upload a file.
Continue	Click **Continue** to upload the file containing the class and catalog data. When you click **Continue** and upload a file, the system takes you to the data-entry page based on the selected template. You can modify or update the class information on this page.

Manually Quick Create

This group box appears only when the Quick Create Option is *Manually Quick Create.*

Select one of the following options for the course, delivery method, or class you are creating:

- *Create New*

  When you select *Create New,* the system populates the fields on the data-entry page for the course, delivery method, or class with the default or custom values specified on the Template Framework - Section Details page. If there are no defaults or custom values defined for a field, and the field is editable, you must enter the value manually.

- *Use Existing*

  When you select *Use Existing,* the system populates the fields on the data-entry page for the course, delivery method, or class with the existing values in the Maintain Courses (LM_CI_LA_CMP), Maintain Delivery Methods (LM_DMTHDS_LA_GBL), and Maintain Classes (LM_ACT) components. If the values defined at the component level conflict with default or custom values specified on the Template Framework - Section Details page, the component values override the template values.

Field or Control	***Description***
Template	Select one of the templates you defined on the Template Setup page. The system populates the template fields with data when you click **Continue.**
Continue	Click **Continue** to populate the template fields with data and to access the data-entry page based on the selected template. You can modify or update the information on this page.

Content Template - <Template Name> Page

Use the Content Template - <Template Name> page (LM_CT_PAGE) to view and edit the data on the data-entry page generated from a class template.

Navigation:

Click **Continue** on the Quick Create Classes page.

The group boxes and fields on this page vary depending on the template definition.

Review and modify the required and optional data on this page.

Field or Control	***Description***
Save	Click to save the data entered on the Content Template - <Template Name> page. If you navigate to another page, the data will no longer be viewable on the template–based page. To view the data, access the source components (Maintain Courses [LM_CI_LA_CMP], Maintain Delivery Methods [LM _DMTHDS_LA_GBL], and Maintain Classes [LM_ACT]). .
Send Notification	Click to open the Send Notification page. Use this page to search for users with the administrator role designation and to send workflow notifications to these users regarding the newly created courses and classes. **Note:** The workflow notification contains a link that transfers the user to the Review Imported Courses page.

Creating Multiple Classes Using a Template (Catalog Import Process)

Page Used to Create Multiple Classes Using a Template

Page Name	***Definition Name***	***Usage***
Catalog Import Page	LM_CT_LOAD	Quickly import multiple classes into the system.
Content Template - <Template Name> Page	LM_CT_PAGE	View and edit imported class data on the data-entry page generated from a class template.

Understanding Creating Multiple Classes

After defining a template, you can use it to load multiple classes into Enterprise Learning Management from an external file or group of files. The system automatically maps the data contained in the files to the fields defined in the template, and uses the template to select and format this data so that it can be imported into the database.

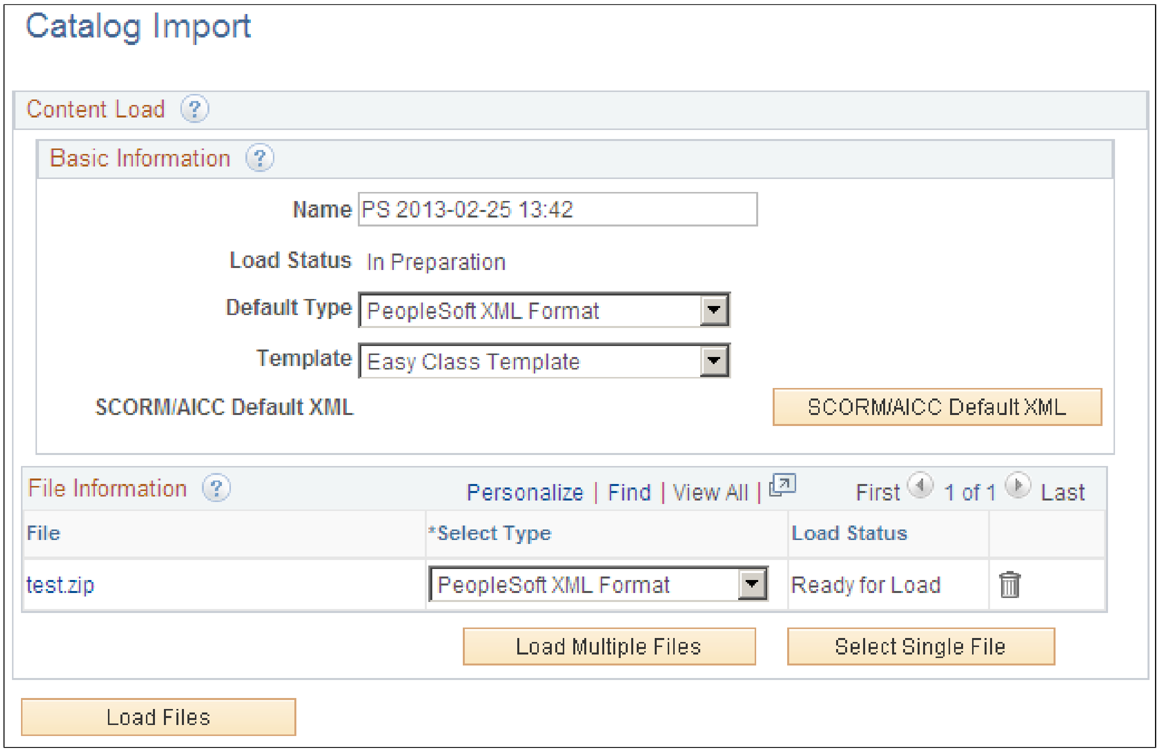
Catalog Import Page

Use the Catalog Import page (LM_CT_LOAD) to quickly import multiple classes into the system.

Navigation:

Enterprise Learning > **Catalog** > **Catalog Import** > **Catalog Import**

This example illustrates the fields and controls on the Catalog Import page.



Basic Information

Field or Control	***Description***
Name	System generated name for the import load.
Load Status	Displays the overall status of the import process. Values are: *In Preparation*: The import request is being prepared but has not yet been submitted for processing. *Ready for Load*: The import request has been submitted, but has not yet been processed. *Load in Progress*: the system is importing the data in the files. *Loaded*: the data in the files is fully imported. *Error*: the data could not be imported due to an error in one or more files.

Field or Control	*Description*
Default Type	Select a default file type for the files you are uploading. Valid values are: • *AICC* • *PeopleSoft XML Format* • *SCORM 1.2* • *SCORM 2004* You can override the default value for selected files by entering a different file type in the **Select Type** field.
Template	Specify the template to use to select and format the data in the external files.
SCORM/AICC Default XML	Click to attach an XML file containing default values that you define when creating the XML file. This enables you to establish default values for the courses you are loading so that you don't have to update them manually.

File Information

Field or Control	*Description*
File	Displays the name of the file you are loading into the system. Click the file link to view the contents of the file.
Select Type	Override the default file type for an individual file if required.
Load Multiple Files	Click to upload multiple files.
Select Single File	Click to upload a single file.
Load Files	Click to import the uploaded files into the system. The **Load Files** button becomes available only after a file is successfully uploaded.

Field or Control	*Description*
Refresh	Click to update the status displayed in the **Load Status** field. The Refresh button appears when you click **Load Files** to import single or multiple files.
Load Status	Displays the import status of a file. Values are: *Ready*: the file is ready to be imported. *Error*: the data could not be imported due to an error in the file.

Field or Control	*Description*
Edit	After a class file is imported, click the edit icon to review and update the information about the class on the template-based data-entry page. The **Edit** icon appears when you click **Load Files** to run the import process.

Field or Control	*Description*
Edit Selected	Select a group of class files in the **File Information** group box and click **Edit Selected** to review and update information about the selected classes on the template-based data-entry page. The **Edit Selected** button appears when you click **Load Files** to run the import process.

Content Template - <Template Name> Page

Use the Content Template - <Template Name> page (LM_CT_PAGE) to view and edit imported class data on the data-entry page generated from a class template.

Navigation:

Click the edit icon for a single file on the Catalog Import page, or click the Edit Selected button for a group of files.

The group boxes and fields on this page vary depending on the template definition.

Review and modify the required and optional data on this page.

Field or Control	*Description*
Save	Click to save the data entered on the Content Template - <Template Name> page. If you navigate to another page, the data will no longer be viewable on the template-based page. To view the data, access the source components (Maintain Courses [LM_CI_LA_CMP], Maintain Delivery Methods [LM_DMTHDS_LA_GBL], and Maintain Classes [LM_ACT]).
Send Notification	Click to open the Send Notification page. Use this page to search for users with the administrator role designation and to send workflow notifications to these users regarding the newly created courses and classes. **Note:** The workflow notification contains a link that transfers the user to the Review Imported Courses page.

Chapter 20

Managing Mandatory Learning

Understanding Mandatory Learning

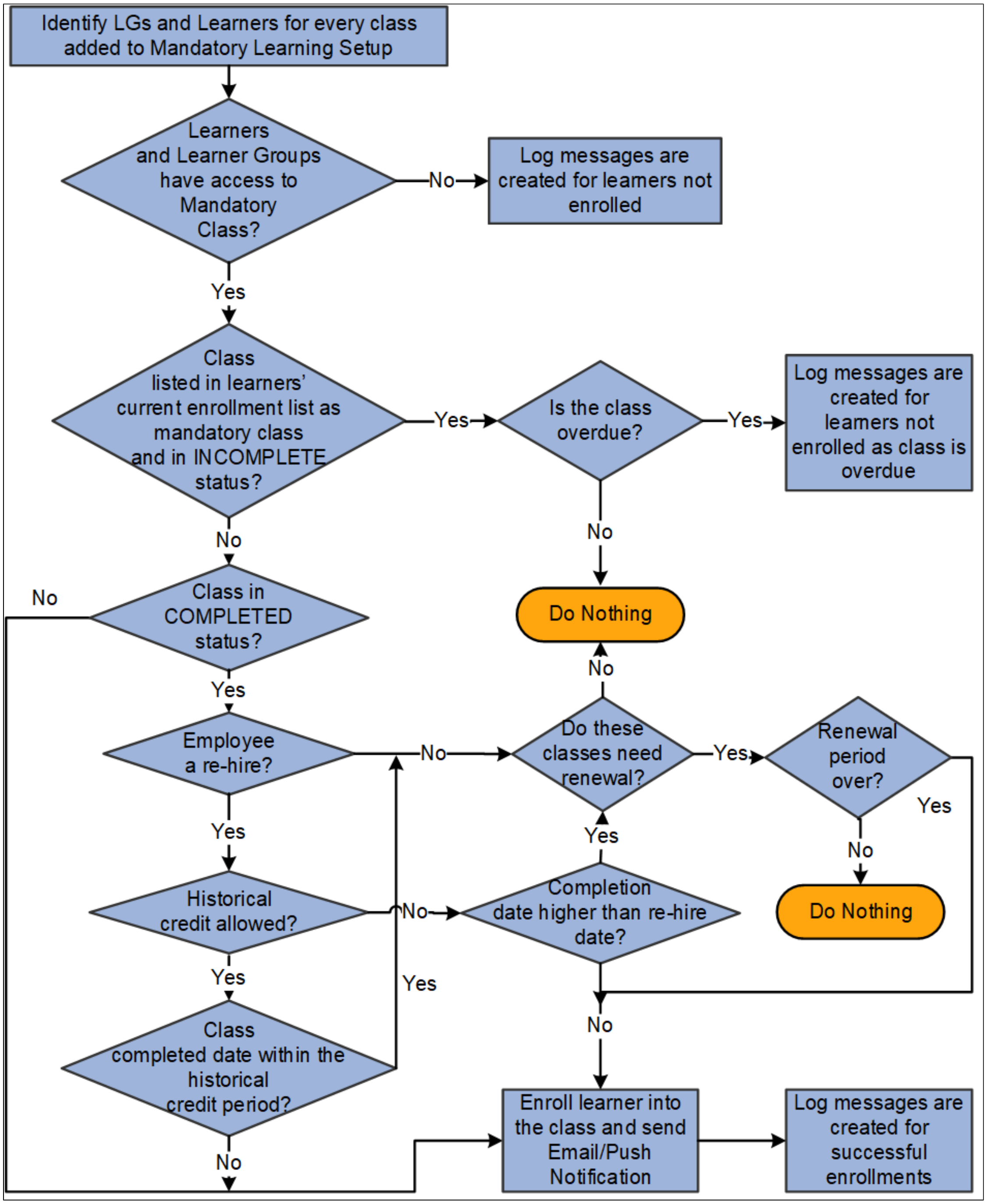
Every organization has trainings that employees are required to complete in order to stay compliant with legal regulations laid down by the government. PeopleSoft ELM provides the feature, Mandatory Learning, which helps manage such compulsory trainings for employees.

Learning administrators can use this feature to:

- Define mandatory trainings specific to learners or even learner groups.
- Automatically enroll learners into Mandatory Learning classes specific to their learner groups.
- Notify learners/managers about the Mandatory Learning class assigned.
- Notify learners/managers about the approaching due date for Mandatory Learning class enrollments.
- Notify learners/managers that the Mandatory Learning class is overdue.
- Manage Mandatory Learning class when learners move in/out of learner groups.
- Manage Mandatory Learning class for rehired employees.

Mandatory Learning Enrollment Process

This example illustrates the Mandatory Learning Enrollment Process Flow Diagram.



The mandatory learning enrollment process begins with marking classes as 'mandatory' for learner groups or learners in the class setup (i.e. the Maintain Classes page). For each class identified, the process checks if every individual learner, as well as the learners in the Learner Group have access to that class and enrolls them in the class, if they are not already enrolled into it.

For some learners the class will be in the 'Completed' status, in which case the system checks if the class needs renewal. For all classes requiring renewal, the process checks if the renewal period is over, and if yes, the learners are re-enrolled into the class. For employees that are recently rehired, the process is equipped to allow historical credit for evaluating mandatory learning for that employee based on what has been indicated in the mandatory learning setup. If your organization allows historical credit for re-hired employees, refer to the section below: *Historical Credit for Re-hired Employees*.

For all enrollments processed, the Mandatory Learning process stages data in the notification records which are then used to notify the learners about their enrollments. Depending on the rules set, the process sends out email notifications to managers about the enrollment of team members. With every notification email, managers receive an attachment of the consolidated list detailing the enrollment status of team members.

Historical Credit for Re-hired Employees

All employees who were recently rehired into the organization (i.e. after the last time the Mandatory Learning Process was run), there is a possibility that they had completed the same class during their previous tenure. The process successively checks if:

- The employee is eligible for receiving historical credit
- The last completion date of the class falls within the credit period allowed
- The class does not require a renewal.

If the employee satisfies all these criteria, then he/she is not required to re-take the class and is given historical credit for it. If at any point, one of the above criteria is not satisfied, then the employee is re-enrolled into the class.

Managing Mandatory Learning Enrollments

This topic discusses enrollments into the Mandatory Learning classes.

Pages Used to Manage Mandatory Learning Enrollments

Page Name	***Definition Name***	***Usage***
Mandatory Learning Enrollment Page	LM_ML_PRCS_ENRL	Process mandatory learning enrollments.
Mandatory Notifications Page	LM_RUNCTL_ML_NOTIF	Process notifications for the mandatory learning enrollments.
Drop Mandatory Enrollments Page	LM_RUN_ML_DROP	Run the process to drop learners out of mandatory enrollments when they move from one learner group to another.

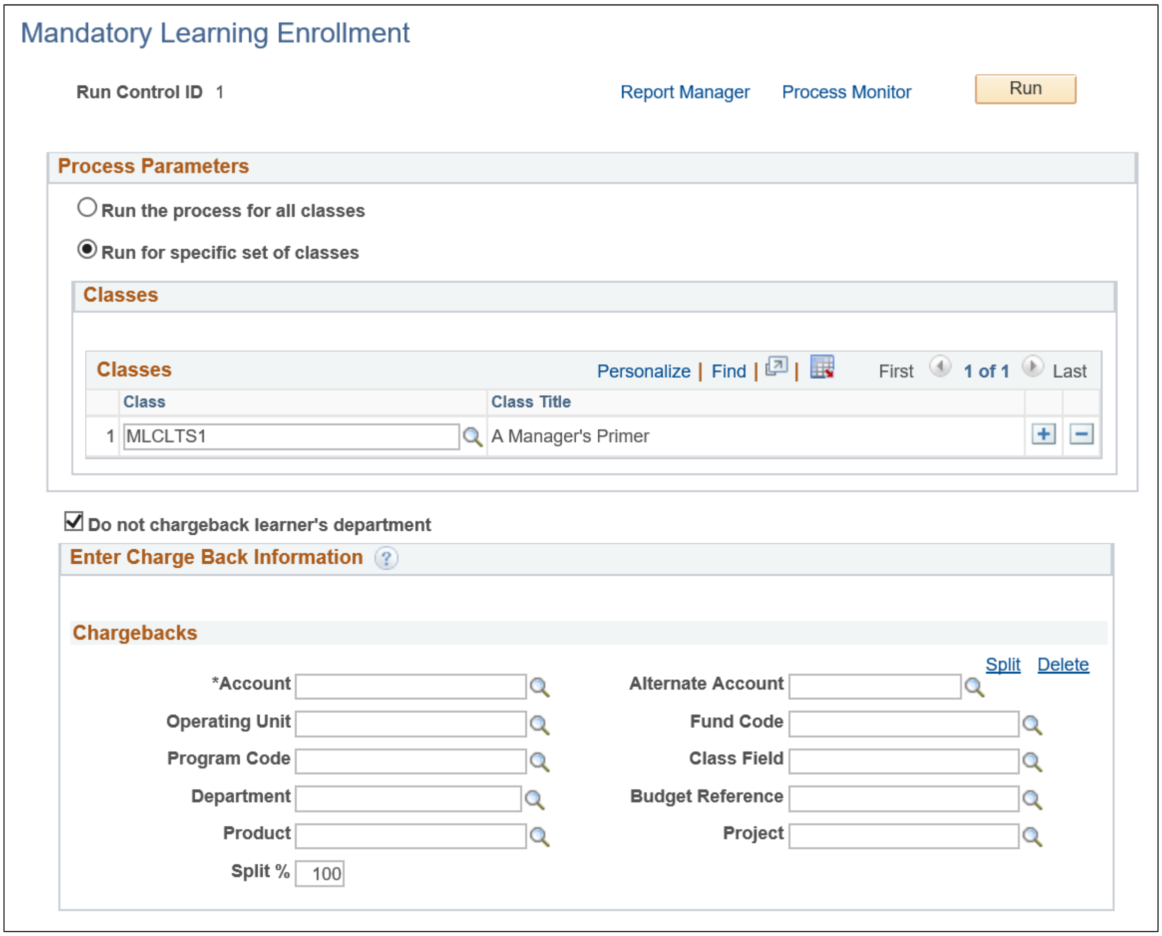
Mandatory Learning Enrollment Page

Use the Mandatory Learning Enrollment page (LM_ML_PRCS_ENRL) to process mandatory learning enrollments.

Navigation:

Enterprise Learning > Learner Tasks > Mandatory Learning > Mandatory Enrollments

This example illustrates the fields and controls on the Mandatory Learning Enrollment page. The fields and controls are explained later on the page.



Field or Control	***Description***
Run the process for all classes	When this option is selected, the process runs for the whole catalog for all the learners.
Run for specific set of classes	When this option is selected, the process runs for only those classes selected in the grid below.
Do not chargeback learner's department	When this check box is selected, the 'Enter Charge Back Information' group box is displayed.
Account	This is a required field, while entering Chargeback information. The process charges back to this account when there is cost associated with the class.

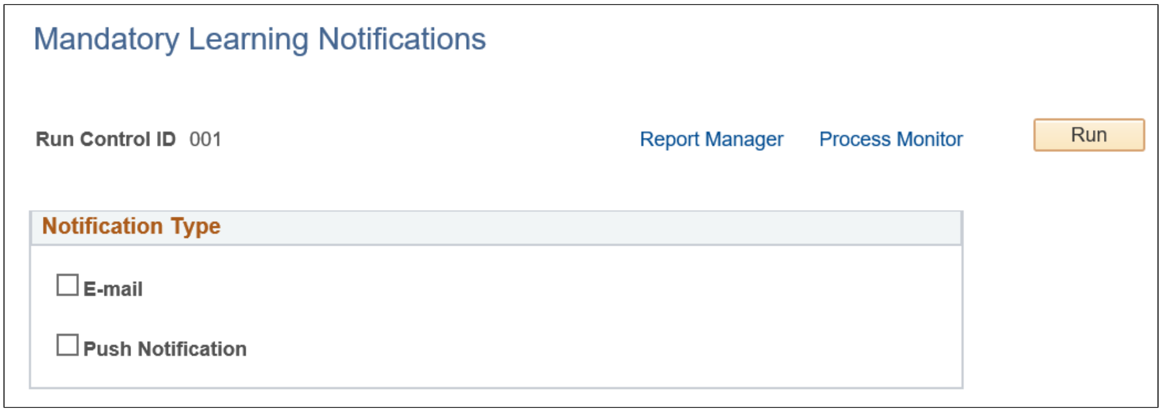
Mandatory Notifications Page

Use the Mandatory Notifications page (LM_RUNCTL_ML_NOTIF) to process notifications for the mandatory learning enrollments.

Navigation:

Enterprise Learning > **Learner Tasks** > **Mandatory Learning** > **Mandatory Notifications**

This example illustrates the fields and controls on the Mandatory Notifications page. The fields and controls are explained later on the page.



Field or Control	***Description***
E-mail	Select this check box to send email notifications to the selected population.
Push Notification	Select this check box to send push notifications to the selected population.

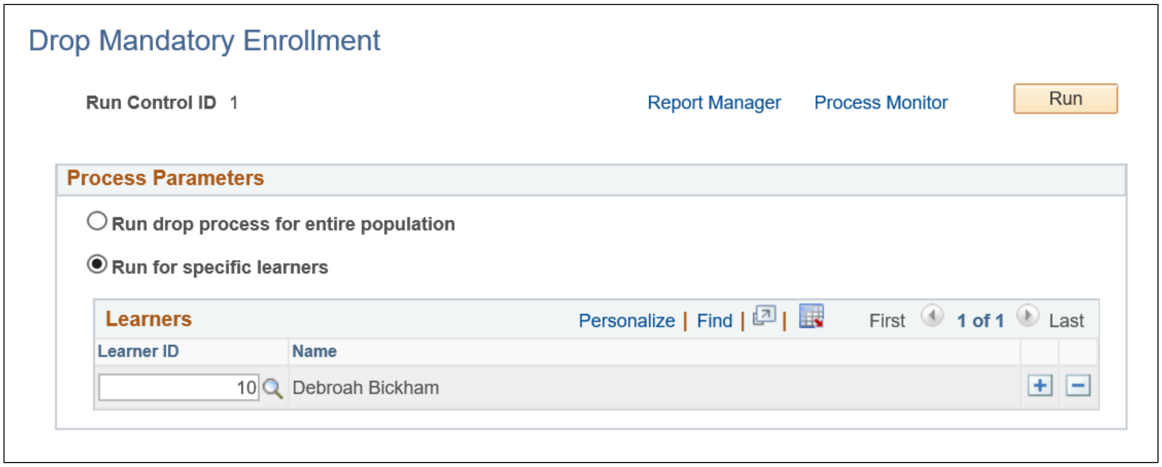
Drop Mandatory Enrollments Page

Use the Drop Mandatory Enrollments page (LM_RUN_ML_DROP) to run the process to drop learners out of mandatory enrollments when they move from one learner group to another.

Navigation:

Enterprise Learning > **Learner Tasks** > **Mandatory Learning** > **Drop Mandatory Enrollments**

This example illustrates the fields and controls on the Drop Mandatory Enrollments page. The fields and controls are explained later on the page.



Field or Control	***Description***
Run drop process for entire population	When this option is selected, the process runs for the whole catalog for all the learners.
Run for specific learners	When this option is selected, the process runs for only those learners selected in the Learners grid below.

Chapter 21

Managing Supplemental Learning

Understanding Supplemental Learning

Learners might complete learning opportunities beyond the cataloged classes and programs, for which you need to keep a record. For example, they might attend a seminar or conference, take an academic course, have equivalent external work experience, or acquire some form of on-the-job training. The supplemental learning feature enables learners to receive credit within your learning system for completing these other forms of learning. Your organization defines the types of supplemental learning available, and learners, managers, and administrators can then add supplemental learning achievements to a learner's record based on these types.

Mapping Options

When defining a supplemental learning type, you can enable mapping of the supplemental learning to an equivalent course or program that already exists in the catalog, or to an existing objective. The user selects the relevant course, program, or objective when reporting the supplemental learning.

If you enable mapping to equivalent programs, users can select only those programs that are set up to allow waivers. To enable complete program waivers, select the corresponding check box on the Maintain Programs - Details page.

Approvals

You can require approval of supplemental learning. When approval is required, and the user selects a Submit for Approval status on the Supplemental Learning submission page, the system sets the status of the supplemental learning to Pending Approval. During this time, the user can edit the supplemental learning submission or drop it. If approved, the system updates the status to Completed.

If approval is not required for supplemental learning, the user can turn off approvals on the Install Defaults - Programs page. Then, the system automatically approves the request and sets the status to Completed.

The following rules also apply:

- When a learner who has no manager submits a request that requires manager approval, the system sets the status to Completed when the learner selects Submit for Approval.
- When a manager who is required to approve a learner's supplemental learning submits a request for the learner, the learning is considered approved when the manager selects the Submit for Approval status.

If the user has mapped the supplemental learning to an equivalent course or program, upon completing the supplemental learning, the system sets the status of each course or program to waived. When a course or program is waived, the system automatically assigns learning objectives that are associated with the course or program to the learner in met status, provided the objectives were previously assigned to the learner with a status of needed.

Setting Up Supplemental Learning Types

Pages Used to Set Up Supplemental Learning Types

Page Name	*Definition Name*	*Usage*
Define Supplemental Learning - Details Page	LM_ADHC_SETUP_PG	Create or modify supplemental learning types.
Define Supplemental Learning - Security Page	LM_ADHC_LE_PG	Identify the learning environment and learner groups that can access this supplemental learning type.

Understanding Supplemental Learning Types

Use the Define Supplemental Learning component (LM_ADHC_SETUP) to define different types of ad hoc learning, including required and optional fields, approval requirements, equivalency mapping, and security. Learners, managers, and administrators can then use these supplemental learning types to add supplemental learning accomplishments for a learner.

Enterprise Learning Management delivers several supplemental learning types: conference, equivalent experience, external learning, on-the-job training, and seminar. You can modify these delivered types and define new ones as required.

Important! To enable learners to view supplemental learning on the self-service My Learning page, and managers to view supplemental learning through the Team Learning page, use the Learning Filters (LM_FILTER) component to specify which supplemental learning types to make visible to users.

Related Links

Defining Search Filters

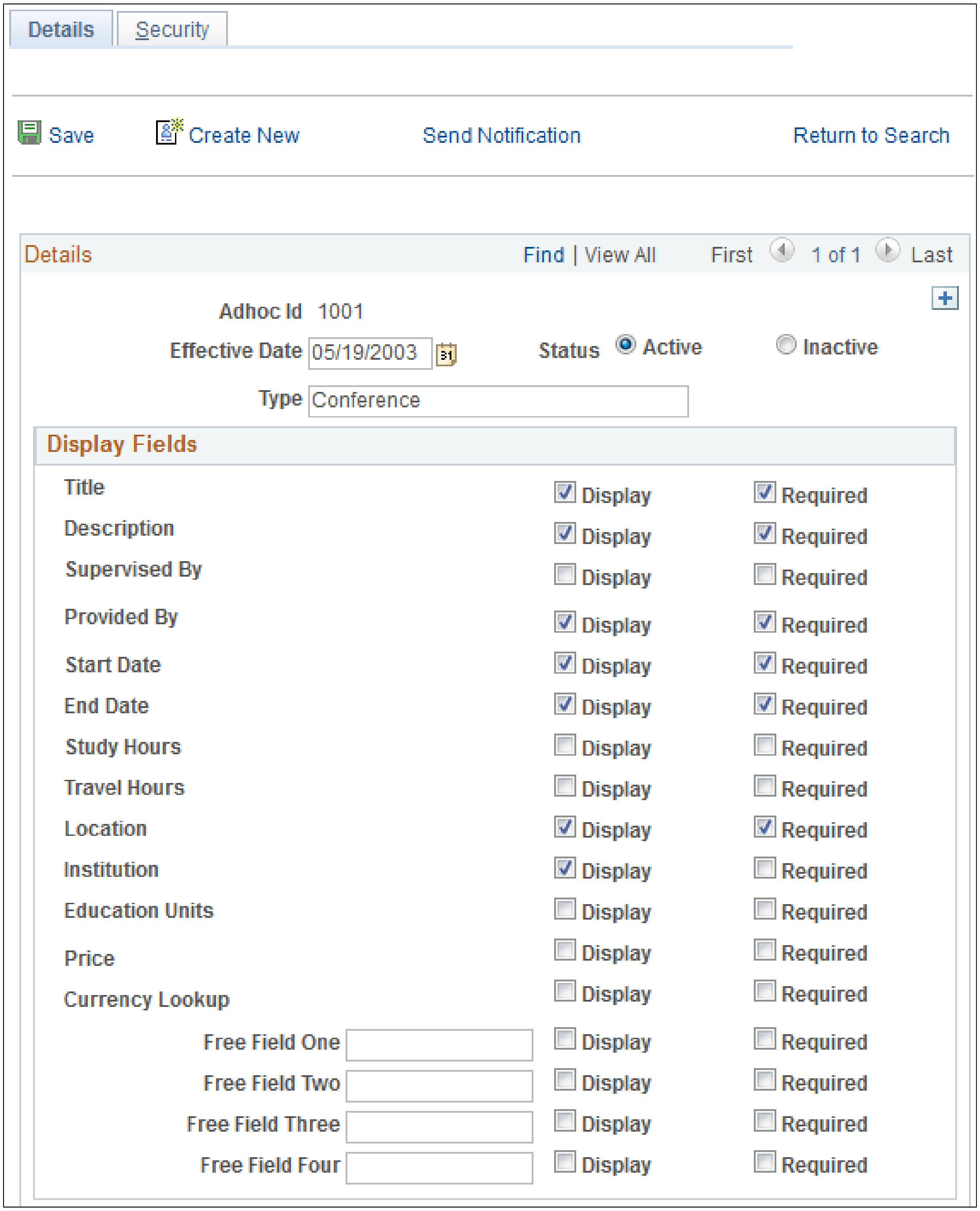
Define Supplemental Learning - Details Page

Use the Define Supplemental Learning - Details page (LM_ADHC_SETUP_PG) to create or modify supplemental learning types.

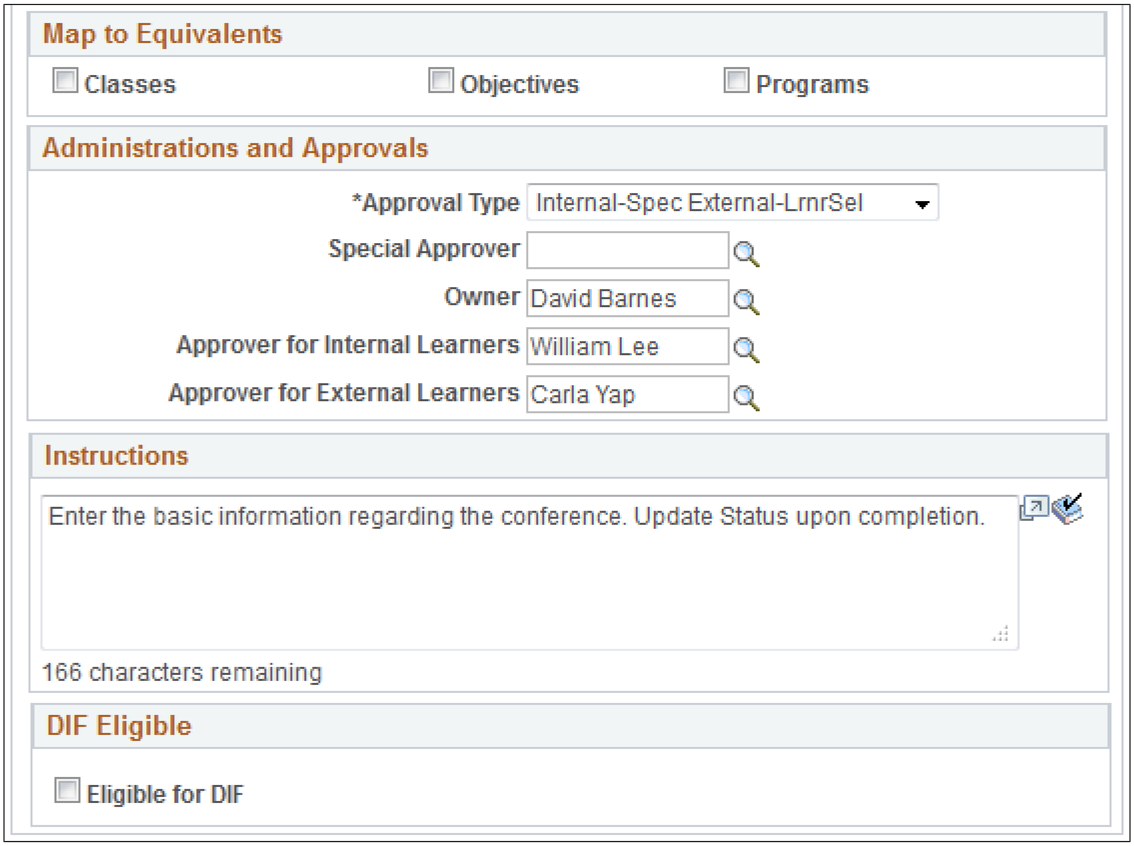
Navigation:

Enterprise Learning > **Catalog** > **Define Supplemental Learning** > **Details**

This example illustrates the fields and controls on the Define Supplemental Learning - Details page (1 of 2).



This example illustrates the fields and controls on the Define Supplemental Learning - Details page (2 of 2).



Details

Field or Control	*Description*
Type	The name of the ad hoc learning type. The system displays this value in the Type field from which users can select when reporting supplemental learning.
Effective Date and **Status**	Select the effective date and status for the supplemental learning type. The effective date controls when the system makes this supplemental learning type available to use for adding supplemental learning.

Display Fields

Use this group box to select the fields that you want to display on the Supplemental Learning submission form and indicate whether completion of each selected field is required. You cannot require a field without also displaying it. If you select the **Required** check box for a field, the system automatically selects the **Display** check box for that field.

In the **Free Field One** through **Free Field Four** fields, you can enter field labels for additional data that you want to track with this supplemental learning type. The data that users subsequently enter in free fields on the Supplemental Learning submission form is for information purposes only.

Map to Equivalents

You can set up a supplemental learning type to enable learners to map supplemental learning to courses, programs, and objectives. Selecting the following check boxes, causes an Add Class button, Add Objectives button, or Add Program button to appear on the Supplemental Learning submission page, as applicable. The user can click the button to search for the equivalent learning or objective. When learners complete a supplemental learning to which they've mapped a class, program, or objective, the system records the item as waived for the learner.

Field or Control	***Description***
Map To Equivalent Classes	Select to enable the user to map this supplemental learning type to equivalent courses in the learning catalog. (From the learner's perspective, courses are referred to as classes because the learner does not distinguish between a course and a class.)
Map To Objectives	Select to enable the user to map this supplemental learning type to objectives.
Map To Equivalent Programs	Select to enable the user to map this supplemental learning type to equivalent curricula or certification programs.

Administrations and Approvals

Use this group box to specify administration and approval information.

Field or Control	***Description***
Approval Type	If the supplemental learning requires approval prior to an internal learner receiving credit for it, select the approval process definition here. You can select from the approval process definitions defined for your organization. See Approval Process Definition Setup.
Special Approver	If the approval process definition selected in the **Approval Type** field calls for a special approver, select that person here. If the approval process definition does not require a special approver, the system ignores the name entered here.

Field or Control	*Description*
Owner	As reference, enter the name of the person responsible for constructing or managing this supplemental learning type.
Approver for Internal Learners and **Approver for External Learners**	If you select the Supplemental Group Enrollment check box on the Install Defaults – Enrollment Page, administrators and managers can select multiple learners when they add supplemental learning. If the supplemental learning that is being added requires approval, the system uses these fields to determine the default approver for internal and external learners. **Note:** You can override the approver defined here using the **Override Internal Approver** and **Override External Approver** fields on the Supplemental Learning: General Attributes Page.

Note: Administrators and special approvers use the approvals page to approve requests. Managers use the self-service Team Members page to approve requests.

Instructions

Enter the instructions that will appear at the top of the page when a learner or manager adds a supplemental learning.

DIF Eligible

Select the **Eligible for DIF** check box to allow learners to apply supplemental learning of this type toward their Droit Individuel à la Formation (DIF).

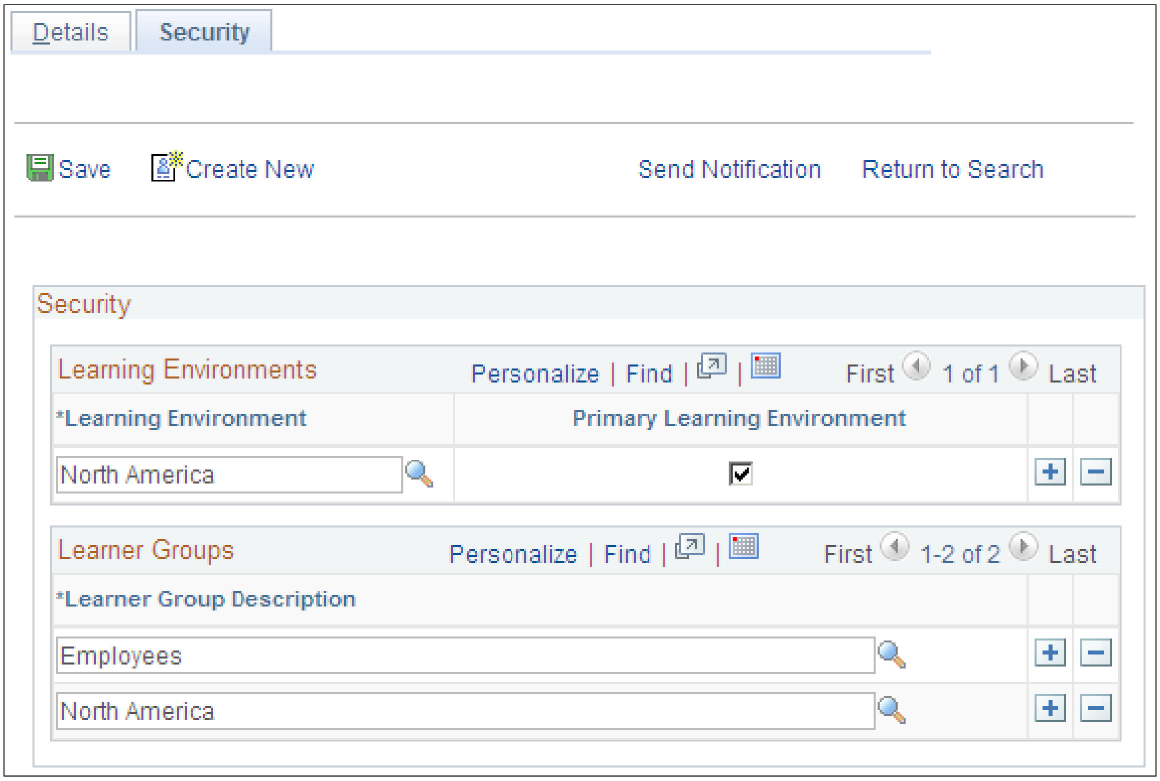
Define Supplemental Learning - Security Page

Use the Define Supplemental Learning - Security page (LM_ADHC_LE_PG) to identify the learning environment and learner groups that can access this supplemental learning type.

Navigation:

Enterprise Learning > **Catalog** > **Define Supplemental Learning** > **Security**

This example illustrates the fields and controls on the Define Supplemental Learning - Security page.



Learning Environment

Use these fields to specify the learning environments for which this course is valid.

Field or Control	***Description***
Learning Environment	The system displays the learning administrator's environment as the default. By adding other learning environments, you enable administrators of those environments to update this supplemental learning type. **Important!** Be sure that your learning environment is listed here. If it's not, you will lose the ability to access this item after you leave this component.
Primary Learning Environment	This object must be associated with at least one learning environment. In this field, select the primary environment with which this object is associated. You cannot remove the primary learning environment from this page without first selecting another environment as the primary. You can change the primary learning environment on this page at any time.

Learner Group Description

Identify which learner groups can access this supplemental learning type. The administrator can select from the learner groups that have been defined for any of the learning environments associated with the supplemental learning type. To access this supplemental learning type, a learner must belong to a learner group that is listed here.

Adding and Editing Supplemental Learning

Managers and learners can use self-service pages to add and edit supplemental learning. The self-service pages are similar to the administrator pages that are listed here.

Pages Used to Report Supplemental Learning

Page Name	***Definition Name***	***Usage***
Supplemental Learning - Find Learners Page	LM_ADM_FND_LRNR	Find and select learners for whom to report supplemental learning.
Group Enrollment - Warning Page	LM_ENRL_WARNING	Schedule a mass enrollment request for supplemental learning.
Supplemental Learning (Mass Enrollment) Page	LM_SEL_ADHC_TYPE	Verify selection criteria for the learners whom you want to enroll and specify mass enrollment options such as enrollment overrides and notifications.
Supplemental Learning (Select Type) Page	LM_SEL_ADHC_TYPE	Select the type of supplemental learning to add for the learner.
Supplemental Learning: General Attributes Page	LM_ADHC_LRN_PG	Add supplemental learning details for a learner.
Supplemental Learning: Training Plan Attributes Page	LM_ADHC_LRN_PG	Enter any training plan attributes for supplemental learning.
Supplemental Learning (Edit) Page	LM_ADHC_LRN_PG	Edit a supplemental learning request. You cannot edit supplemental learning after it has been approved.
Add Objective To Get Credit Page	LM_ADHC_OBJ_PG	Search for and select the objectives to which this supplemental learning maps.

Related Links

Learner Self-Service Actions

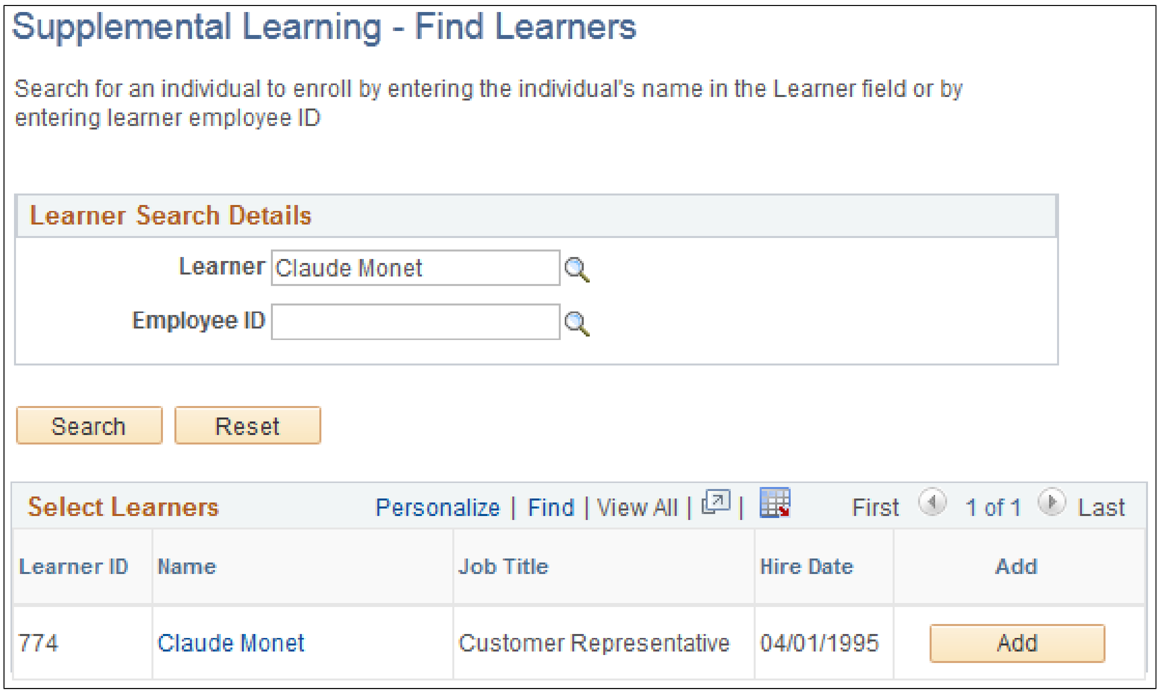
Supplemental Learning - Find Learners Page

Use the Supplemental Learning - Find Learners page (LM_ADM_FND_LRNR) to find and select the learner for whom to report supplemental learning.

Navigation:

Enterprise Learning > **Learner Tasks** > **Add Supplemental Learning**

This example illustrates the fields and controls on the Supplemental Learning - Find Learners page.



Learner Search Details

Use the fields in this group box to search for the learner for whom you are adding supplemental learning.

Field or Control	***Description***
Learner	Enter a value to search for a learner by name.
Employee ID	Enter a value to search for a learner by ID.
Search	Click to search for the learner. The system displays matching results in the **Select Learners** group box.

Select Learners

Displays the learners who match your search criteria.

Field or Control	Description
Name	Click a name link to view details about the learner.
Add	Click next to the learner for whom you want to add supplemental learning. Clicking this button accesses the Supplemental Learning (Select Type) Page.

Searching for Multiple Learners

If you select the Supplemental Group Enrollment check box on the Install Defaults – Enrollment Page, you can search for and select multiple learners when adding supplemental learning.

This is an example of how the Supplemental Learning - Find Learners page looks when supplemental group enrollment is enabled.

Use the **Learner Search Details** group box to search for learners. Enter search criteria and click **Search** to display the search results on the Enroll Learners - Select Learners page. Click **Reset** to clear the search criteria fields.

Field or Control	Description
Learner	Enter a name to search for a specific learner.
Business Unit	Select a business unit to search for learners in a specific business unit.
Employee ID	Enter an employee ID to search for a specific learner.

Field or Control	Description
Job Code Description	Select a job code to search for learners with a specific job code.
Manager	Select a manager to search for that manager's direct reports.
Position Description	Select a position to search for learners with a specific position.
Learner Group	Select a learner group to search for learners who belong to a specific group. **Note:** Only the learners groups that are associated with the same learning environment as the requester are available to select in this field.
Organization Type	Select an organization type if the requester is an internal learner. Values are: *All:* Includes departments and customer organizations. *Customer:* Customer organizations only. *Department:* Departments only.
Organization Name	Select a department or customer organization if the requester is an internal learner. This field is available only if you select *All* in the **Organization Type** field.
Customer Name	Select a customer organization. The system displays this field only if you select *Customer* in the **Organization Type** field.
Department Name	Select a department. The system displays this field only if you select *Department* in the **Organization Type** field.
Hire Date	Enter dates in the **From** and **Through** fields to search for learners with a specific hire date.
Search	Click to search for learners. The system displays the learners who meet your criteria on the
Reset	Click to clear all search criteria values.

Group Enrollment - Warning Page

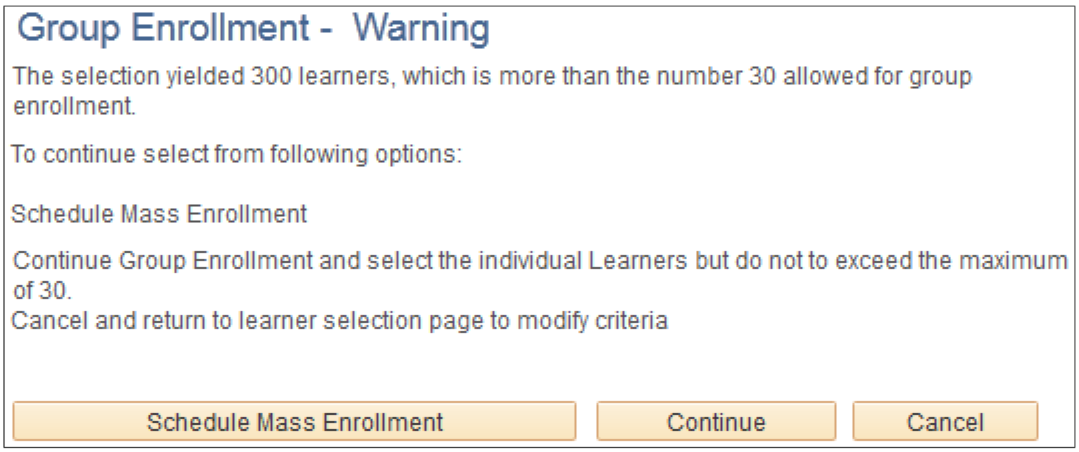
Use the Group Enrollment - Warning page (LM_ENRL_WARNING) to schedule a mass enrollment request for supplemental learning.

Navigation:

Click the **Search** button on the Supplemental Learning - Find Learners page.

Note: This page appears only if supplemental group enrollment is enabled and the number of learners who meet your search criteria exceeds the number allowed for group enrollment.

This example illustrates the fields and controls on the Group Enrollment - Warning page.



Field or Control	***Description***
Schedule Mass Enrollment	Click to create a mass enrollment request. This includes all learners who match the search criteria.
Continue	Click to continue group enrollment. The system displays the Supplemental Learning (Select Type) page.
Cancel	Click to return to the Supplemental Learning - Find Learners page, where you can modify the search criteria.

Supplemental Learning (Select Type) Page

Use the Supplemental Learning (select type) page (LM_SEL_ADHC_TYPE) to select the type of supplemental learning to add for the learner.

Navigation:

Click the Add button for a learner on the Supplemental Learning - Find Learners page.

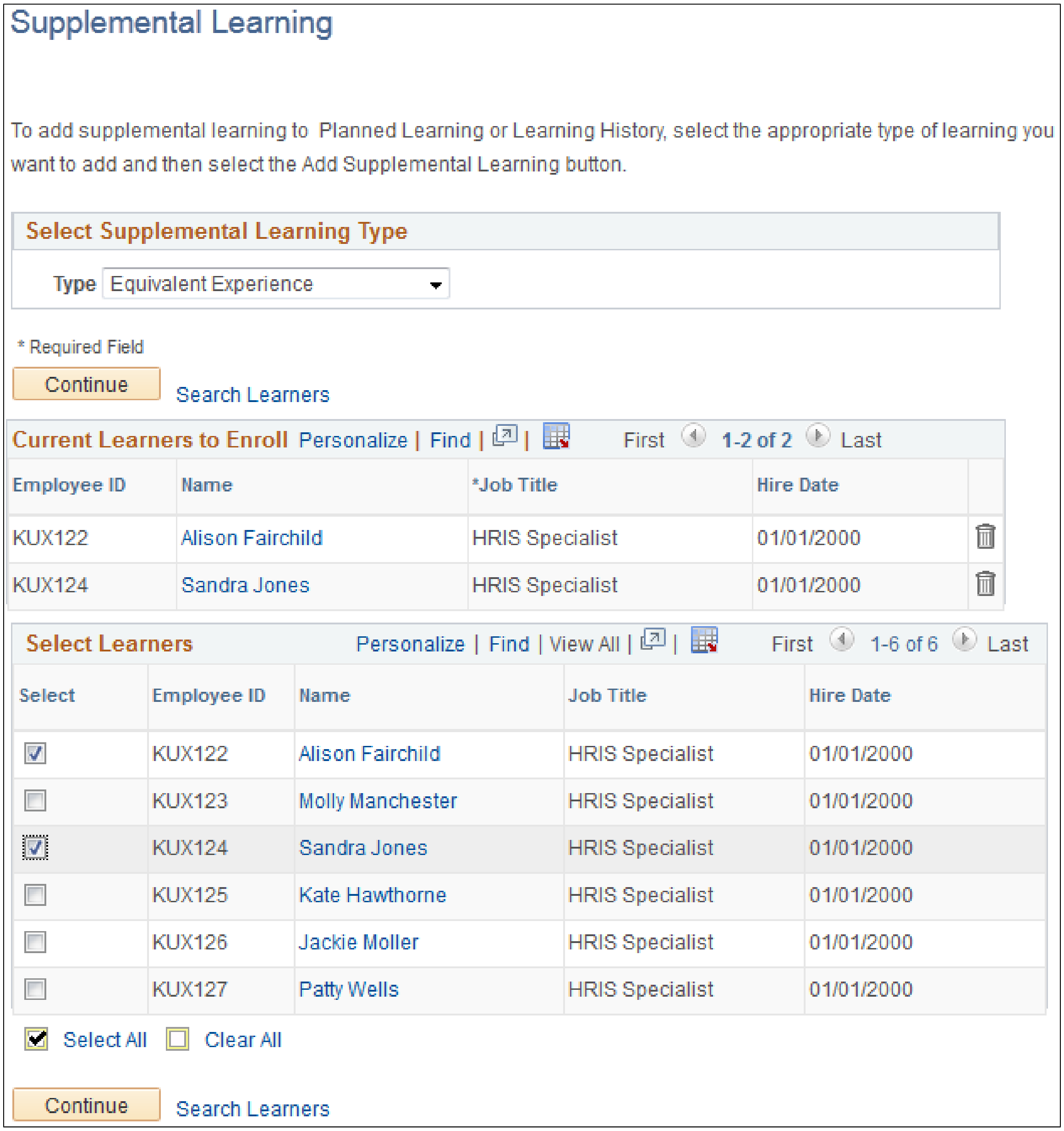
This example illustrates the fields and controls on the Supplemental Learning (select type) page.

Field or Control	***Description***
Type	Select the type of supplemental learning you want to add.
Continue	Click to continue to the Supplemental Learning: General Attributes Page.

Selecting Multiple Learners

If you select the Supplemental Group Enrollment check box on the Install Defaults – Enrollment Page, you can select multiple learners for adding supplemental learning on this page.

This is an example of what the Supplemental Learning (select type) page looks like with supplemental group enrollment enabled.



The **Select Learners** grid displays all learners that met the search criteria on the Supplemental Learning - Find Learners page. Select the check box for each learner for whom you want to add supplemental learning, or click **Select All** to select all learners. The learners that you select appear in the **Current Learners to Enroll** grid.

Field or Control	***Description***
Search Learners	Click to return to the Supplemental Learning - Find Learners Page.

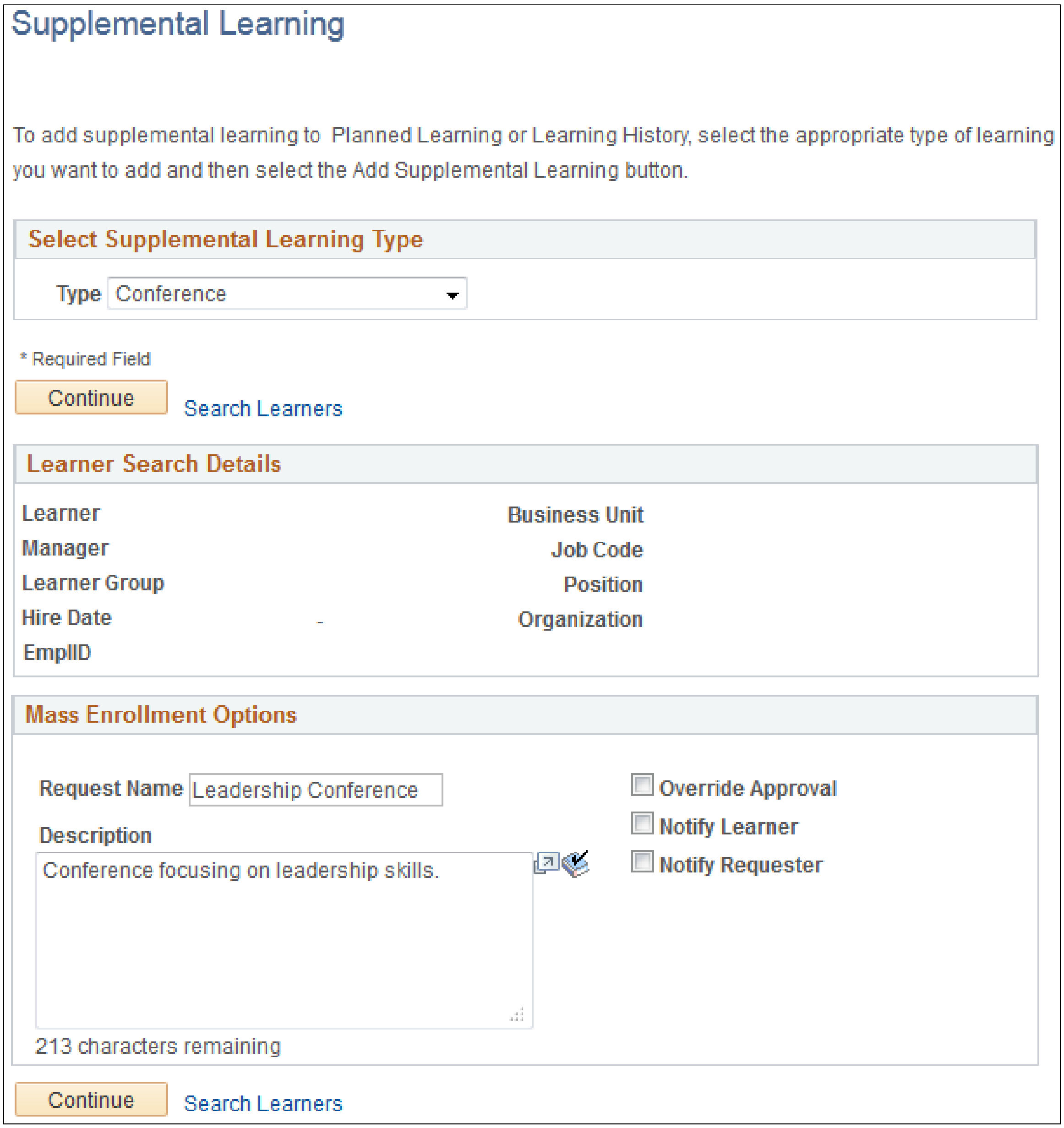
Supplemental Learning (Mass Enrollment) Page

Use the Supplemental Learning (mass enrollment) page (LM_SEL_ADHC_TYPE) to verify selection criteria for the learners whom you want to enroll and specify mass enrollment options such as enrollment overrides and notifications.

Navigation:

Click the **Schedule Mass Enrollment** button on the Group Enrollment - Warning page.

This example illustrates the fields and controls on the Supplemental Learning (mass enrollment) page.



Learner Search Details

Field or Control	***Description***
Type	Select the type of supplemental learning you want to add.
Continue	Click to continue to the Supplemental Learning: General Attributes Page.
Search Learners	Click to return to the Supplemental Learning - Find Learners Page.

Learner Search Details

This group box displays the search criteria that you enter on the Supplemental Learning - Find Learners page.

Mass Enrollment Options

Use this group box to select mass enrollment options.

Field or Control	***Description***
Request Name	Enter the name of the mass enrollment request. This value appears in the **Description** column on the Review Mass Enrollment Requests page. It is a good idea to put in an indicative label and some form of date stamp. This helps you identify the request when you review the requests later.
Description	Enter a description of the mass enrollment request. The system displays the information that you enter on the Review Mass Enrollment report. See Learning Reports.
Override Approval	Select to override manager and administrator approvals for all learners. If the supplemental learning requires approval and you do not select this option, the system sets the supplemental learning status for all learners to pending approval provided that the learners meet the other conditions for successful enrollment.
Notify Learner	Select to send an email notification to learners informing them of their enrollment statuses. When you select this check box, all learners receive a notification email regardless of whether their enrollments were successful.

Field or Control	***Description***
Notify Requester	Select to send an email notification to the requester upon completion of the process. The notification includes how many learners are successfully and unsuccessfully enrolled. The system generates an email that gets queued to be sent to the requester. The email provides the requester with the total number of successful and unsuccessful enrollments.

See Mass Enrollment Workflow Notifications.

See Understanding Mass Enrollment.

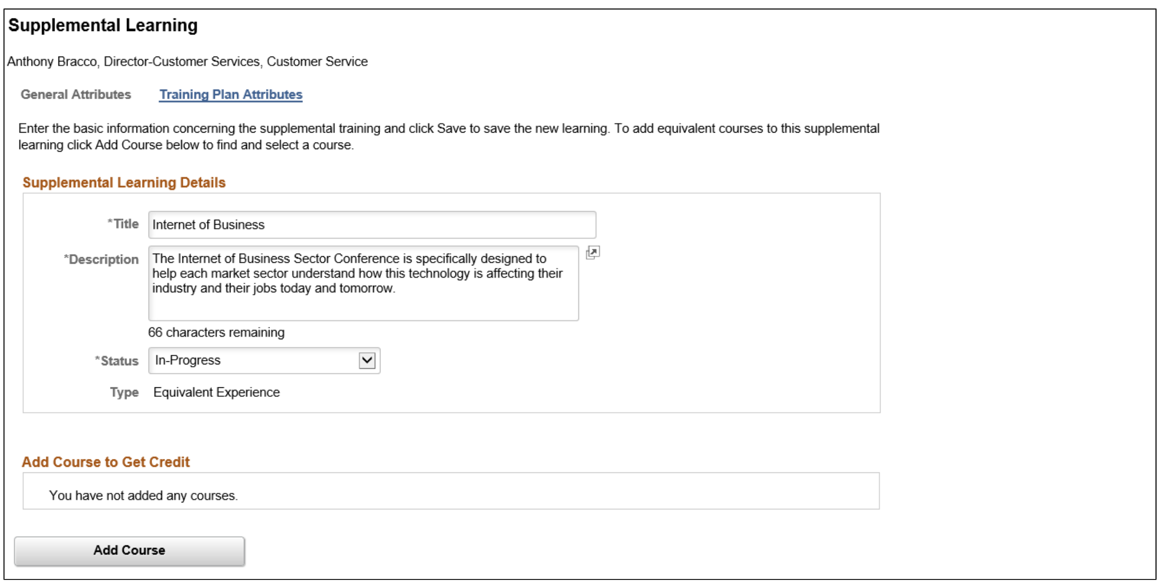
Supplemental Learning: General Attributes Page

Use the Supplemental Learning: General Attributes page (LM_ADHC_LRN_PG) to add supplemental learning for a learner.

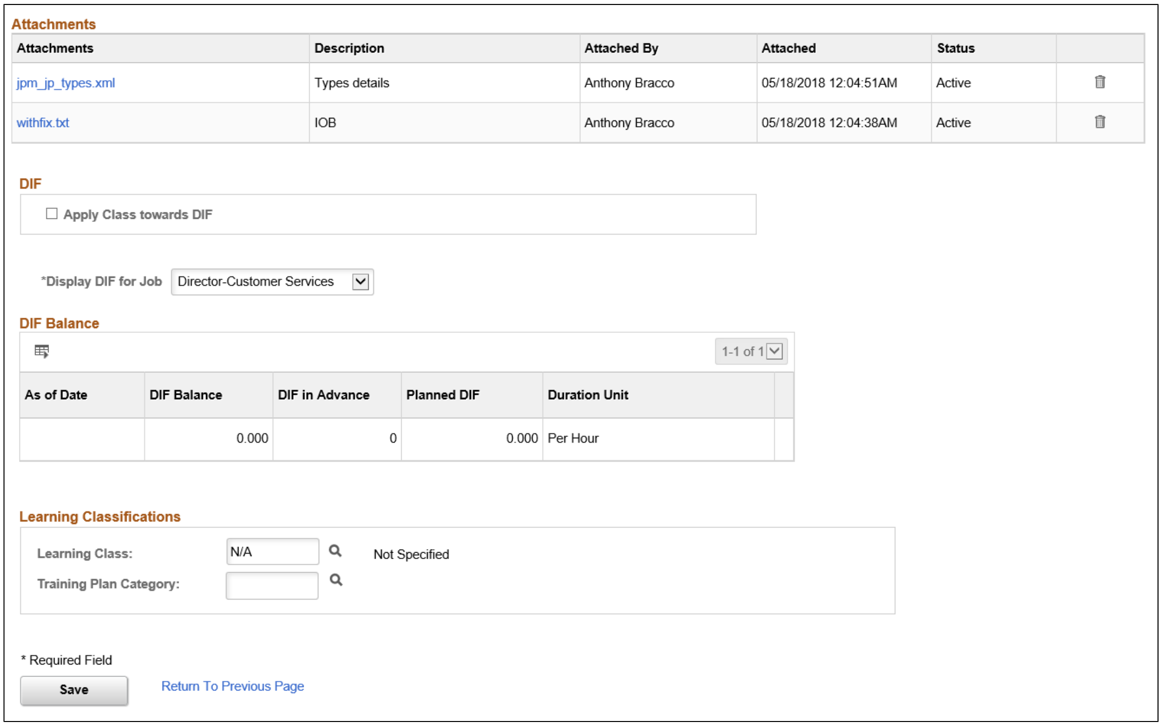
Navigation:

Select a supplemental learning type on the Supplemental Learning (select type) page and click the **Continue** button.

This example illustrates the fields and controls on the Supplemental Learning (add) page.



This example illustrates the fields and controls on the Supplemental Learning (add) page (2 of 2). You can find definitions for the fields and controls later on this page.



Note: The fields that appear on this page depend on the settings defined for the supplemental learning type through the Supplemental Learning setup component (LM_ADHC_SETUP).

Supplemental Learning Details

Field or Control	***Description***
Status	Select from the following values: *Completed, Denied, Dropped, In Progress, Pending approval,* or *Planned.*
Title and **Description**	Enter a title and detailed description for the supplemental learning.
Type	Displays the type of supplemental learning you selected on the Add Supplemental Learning page.
Start Date and **End Date**	Enter the start and end dates of the supplemental learning.
Institution	Enter the name of the institution that provided the supplemental learning.

Field or Control	*Description*
Location	Enter the location where the supplemental learning was provided.
Supervised By	Enter the name of the person who supervised the supplemental learning.
Study Hours and **Travel Hours**	Enter the number of study hours and travel hours associated with the supplemental learning.
Currency Code and **Price**	Enter the cost of the supplemental learning.
Education Units	Enter the amount of education units provided by the supplemental learning.
Provided By	Enter the name of the person or organization that provided the supplemental learning.
Regulatory Requirement	Enter any regulatory requirement met by the supplemental learning.
Professional Certification	Enter any professional certifications earned by completing the supplemental learning.
Approver	Enter the person responsible for approving the supplemental learning item. This field appears only if the supplemental learning type you selected requires approval.
Internal Approver and **Override Internal Approver**	Displays the default internal approver defined for the selected supplemental learning type. Click the Override Internal Approver to enter a different approver for internal learners. **Note:** These fields appear only when you are adding supplemental learning for multiple learners, and the supplemental learning type you selected requires approval. **Note:** If you selected multiple learners and they are all internal learners, then the labels for these fields will be Approver and Override Approver.

Field or Control	*Description*
External Approver and **Override External Approver**	Displays the default external approver defined for the selected supplemental learning type. Click the Override External Approver to enter a different approver for external learners. **Note:** These fields appear only when you are adding supplemental learning for multiple learners, and the supplemental learning type you selected requires approval. **Note:** If you selected multiple learners and they are all external learners, then the labels for these fields will be Approver and Override Approver.

Add Program To Get Credit

Field or Control	*Description*
Add Program	Click to access the Find Learning page where you can search for the program that you want the supplemental learning to provide credit for.

Add Class To Get Credit

Field or Control	*Description*
Add Class	Click to access the Find Learning page where you can search for the class that you want the supplemental learning to provide credit for.

Add Course To Get Credit

Field or Control	*Description*
Add Course	Click to access the Find Learning page where you can search for the course that you want the supplemental learning to provide credit for.

Add Objective To Get Credit

Field or Control	***Description***
Add Objectives	Click to access the Add Objective To Get Credit page where you can search for objectives that you want the supplemental learning to meet.

Attachments

Field or Control	***Description***
Attachments	Displays all files attached by the learner. **Note:** This field appears only when the learner has added at least one file as an attachment.

DIF (Droit Individuel à la Formation)

Select the Apply Class toward DIF check box to apply the supplemental learning toward the learner's DIF. When this check box is selected, the learning appears on the Maintain Pending DIF Requests page, enabling an administrator to approve or deny the DIF request.

This field is available only if the supplemental learning type is defined as eligible for DIF.

DIF Balance (Droit Individuel à la Formation balance)

This grid displays the learner's DIF balances in hours. It appears only when the learner's learning environment is enabled for French features and the supplemental learning type is defined as eligible for DIF.

Learning Classifications

This group box appears only if the supplemental learning type is defined as eligible for DIF.

Field or Control	***Description***
Learning Class	Enter the learning classification that applies to the supplemental learning. Learning classifications appear on training reports and can affect a learner's compensation for training time.
Training Category	Enter the training plan category that applies to the supplemental learning. Like learning classifications, training plan categories appear on training reports and can affect a learner's compensation for training time.

Learners Enrolled

If you select the Supplemental Group Enrollment check box on the Install Defaults – Enrollment Page, the Learners Enrolled grid appears on this page when you click Save. It displays the learners for whom you added the supplemental learning.

This is an example of the Learners Enrolled grid.

Related Links

Setting Up Supplemental Learning Types

Find Learning Page

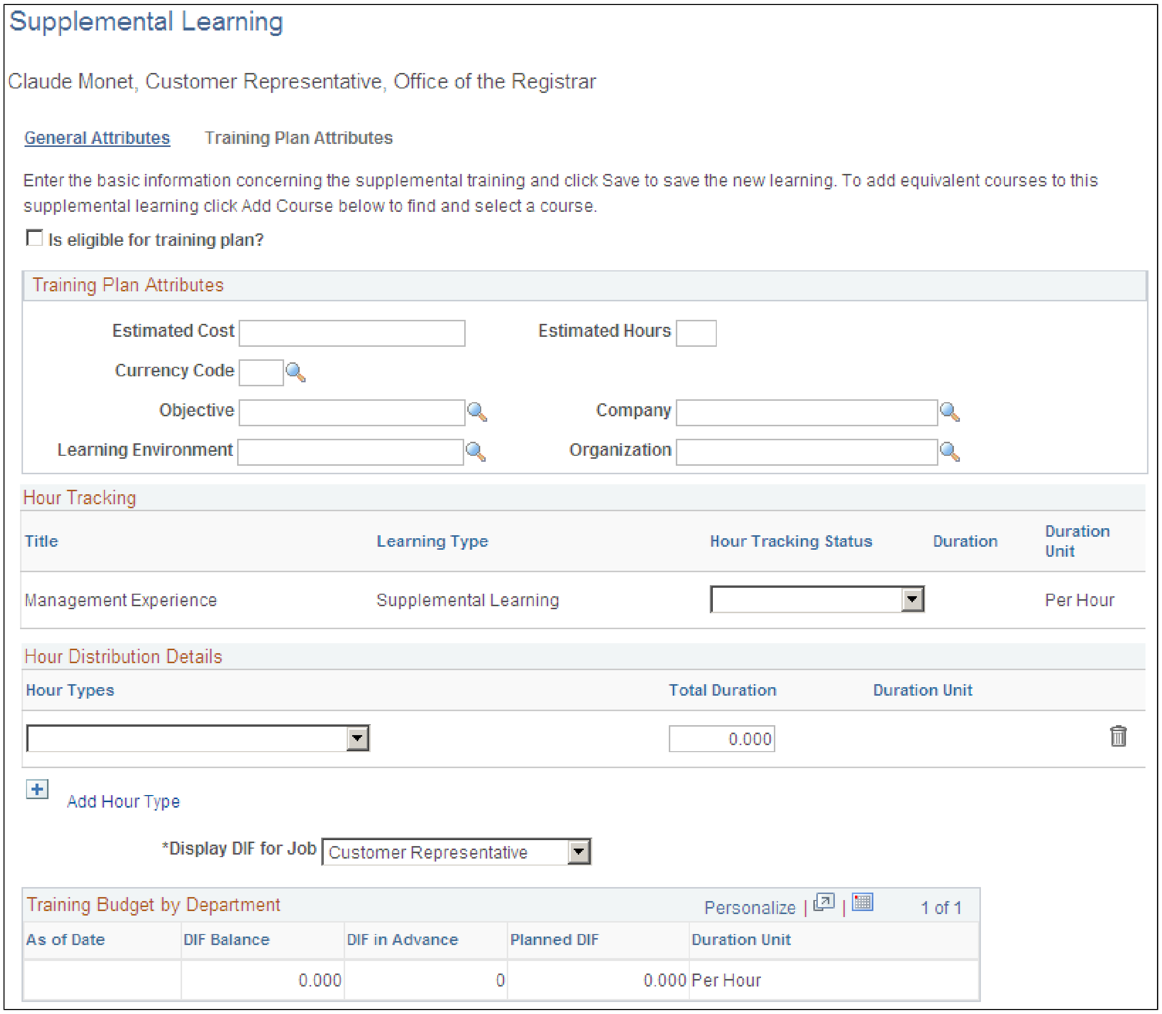
Supplemental Learning: Training Plan Attributes Page

Use the Supplemental Learning: Training Plan Attributes page (LM_ADHC_LRN_PG) to enter any training plan attributes for supplemental learning.

Navigation:

Click the Training Plan Attributes link on the Supplemental Learning: General Attributes page.

This example illustrates the fields and controls on the Supplemental Learning: Training Plan Attributes page.



Field or Control	***Description***
Is eligible for training plan?	Select to include this supplemental learning in training plans, when the request meets all other selection criteria for the training plan.

Training Plan Attributes

Field or Control	***Description***
Estimated Cost	Enter the estimated (flat) class cost per student for the supplemental learning. In the budget section of the Training Plan report, the system compares a department's estimated cost of meeting the demand for learning to the department's training budget.

Field or Control	***Description***
Estimated Hours	Enter the estimated number of hours for the supplemental learning.
Objective	Select a global objective to associate with the supplemental learning. When you generate training plans, the report content is sorted by global objective.
Company	Select a company to associate with the supplemental learning. When you generate training plans, you can include training for selected companies. The default value that appears in this field is based on the job title selected on the Submit Learning Requests - Details: General Attributes page.
Organization	Select the department to associate with the learning request.
Learning Environment	Select a learning environment to associate with the supplemental learning. When you generate training plans, you can include training for selected learning environments.

Hour Tracking

Field or Control	***Description***
Hour Tracking Status	Select the hour tracking status for the supplemental learning. Values are: • *Approved by ELM Administrator* • *Cancelled* • *Pending Review from ELM Administrator*

Hour Distribution Details

Field or Control	***Description***
Hour Types	Select an hour type for the supplemental learning.
Duration	Enter the total duration for the selected hour type.

Training Budget by Department

For French learners, this page includes a group box that displays their training budget DIF balances, DIF in advance balances, and planned DIF hours.

Field or Control	***Description***
Display DIF for Job	Select the learner's job for which you want to view DIF balances.

Supplemental Learning (Edit) Page

Use the Supplemental Learning (edit) page to edit a supplemental learning request. You cannot edit supplemental learning after it has been approved.

Navigation:

Enterprise Learning > **Learner Tasks** > **View All Learning**

Search for and select a learner. On the Learner View page click the title of the supplemental learning or the **Modify** button for a supplemental learning item.

The fields and controls on this page are identical to those of the Supplemental Learning: General Attributes Page.

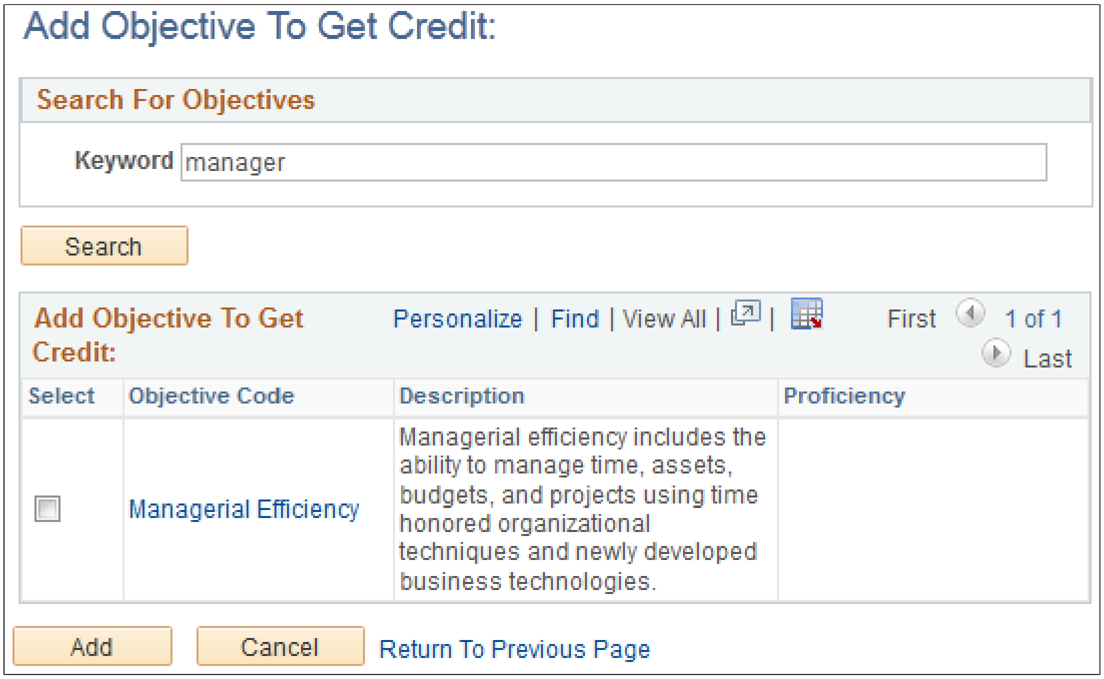
Add Objective To Get Credit Page

Use the Add Objective To Get Credit page (LM_ADHC_OBJ_PG) to search for and select the objectives to which a supplemental learning item maps.

Navigation:

Click the Add Objectives button on the Supplemental Learning: General Attributes page.

This example illustrates the fields and controls on the Add Objective To Get Credit page.



Chapter 22

Managing Training Plans

Understanding Training Plans

A training plan identifies the training that learners are expected to complete over a stated period of time. Each training plan pertains to a single company or learning environment and can be designed to meet one or more high-level learning objectives.

You can use training plans to:

- Estimate the demand for learning.
- Project the cost of delivering training.
- Compare training budgets to estimated training costs.
- Report actual training for a defined period.

Note: (FRA) Organizations that operate in France can generate training plans that satisfy the Workers' Council requirements for reporting forecasted training.

You can create multiple plans for the same time period. For example, you might produce an annual training plan by company, and produce separate quarterly plans by learning environment.

You can also generate training plans for the current period or a future period. Plans are based on class enrollments, learning requests, supplemental learning and program registrations.

Training Plans and Training Budgets

When you define a training plan, you specify the period of time it covers, the learning environment or company and respective establishment or business unit it represents, the objectives, and the training budget for each department. The system produces two reports: the training plan and a training plan budget:

- Training plan

  This report lists all classes, learning requests, supplemental learning, and program registrations that meet the parameters defined on the Training Plan Setup and Training Plan Status Options pages. For each class, it lists the learner's employee ID, name, organization, and other details. Classes are sorted by global objective. The report lists learning requests and the number of learners associated with each request. The enrolled date on the report represents the date the enrollment record was created.

- Training plan budget

  This report includes the same information as the training plan plus the budgeted training amount for each department and the forecasted cost of delivering the training listed for each department. Information is sorted by department rather than by global objective.

Note: (FRA) When French features are enabled for the administrator's learning environment, the reports also include head counts of learners by certain criteria such as age, gender, learning classification, employee category, and other information that is required by the Workers' Council. The labor agreement and related category codes that appear on the report are defined in PeopleSoft HR. A DIF (Droit Individuel à la Formation) indicator on the report is selected when DIF hours are specified for an enrollment request.

Report Formats

You can generate training plans in several formats, including PDF and CSV (comma separated value). Files generated in CSV format can be opened with Microsoft Excel, enabling you to modify the format and content of the reports to meet your requirements.

Forecasted Learning Costs

In the training plan budget report, the system lists the total forecasted training cost for each department, along with the forecasted cost for each related learning request, supplemental learning, program registration, and class enrollment record.

For learning requests, the system uses the estimated (flat) cost per learner that you enter when submitting the learning request.

For enrollment records, forecasted costs can be based on an estimated flat amount per learner, or on an hourly amount per learner multiplied by the number of hours defined for a class's components. If both cost figures are available, and component durations are defined for the class, the estimated hourly cost takes precedence.

For classes, the default rules for using estimated flat and hourly costs work as follows:

- You can define system-wide default values for the estimated cost and hourly cost through the Install Defaults component.
- Learning environments inherit the default cost values from the Install Defaults component.

  You can override both values by learning environment.
- Courses inherit the estimated cost from the learning environment.

  You can override this value for a course.
- Delivery methods inherit the default estimated cost from the course and the default hourly cost from the learning environment.

  You can override both default values for a delivery method.
- Classes inherit the cost values from the delivery method.

  These values do not appear in the Class component and cannot be overridden.

For supplemental learning, the system uses the price field that you can set when defining supplemental learning.

For program registrations, the system determines the cost based on the internal price or external price defined in the program details, whichever is applicable.

Data Selection for Reports

To determine which enrollment records, supplemental learning, program registrations, and learning requests to include in the training plan report, the system refers to the parameters that you define on the Training Plan Status Options page and the criteria entered on the Training Plan Setup page.

On the Training Plan Status Options page you specify the status of the enrollment records, learning requests, supplemental learning, and program registrations that can be included in current and future training plans. For example, you may want to include completed classes in current plans but not in future plans. You define these rules during system configuration.

On Training Plan Setup page, the administrator enters an As of date, Start Date, End Date, and other filtering criteria to specify which records to include in the report.

Budget Modeling

In addition to the training plan and training plan budget reports, PeopleSoft Enterprise Learning Management provides a budget modeling tool that enhances your ability to plan and make adjustments to training plans based on budget data. The Training Plan Budget Model page enables you to perform "what if" analysis based on budget data and training demand costs.

(FRA) Prerequisites for Training Plans

To enable an administrator to see head counts by learner age, gender, learning classification, and category when analyzing training budget models, be sure that French features are enabled for the administrator's learning environment.

Related Links

(FRA) Prerequisites for French Features
Learning Environment - Defaults Page

Setting Up Training Plans

Pages Used to Set Up Training Plans

Page Name	*Definition Name*	*Usage*
Training Plan Status Options Page	LM_FRA_TPLN_SETUP	Identify the status of class enrollments and learning requests to include in actual and future training plans.
Training Plan Setup Page	LM_TRNG_PLAN_SETUP	Define training plan parameters.

Understanding Training Plan Setup

Before you can generate training plans, you must identify which courses, learning requests, supplemental learning, and program registrations your plans can include, define default values for calculating estimated costs, and complete other setup tasks.

The setup steps that are described here are presented in two sections: implementation tasks and plan preparation tasks.

Implementation Tasks

Complete the following tasks during system implementation. You can modify the setup later, as needed.

1. (Optional) Define global objectives.

   A global objective represents a broad learning goal that can be associated with a training plan, for example, a company-wide objective to improve teamwork or adopt new accounting standards. Information in the training plan is sorted by learning objective. Use the Objective Definition (LM_OBJV_TBL) component to identify global objectives.

   See Understanding Objectives.

2. Define criteria for including class enrollments, learning requests, supplemental learning, and program registrations in current or future training plans.

   The system refers to the status of a learner's class enrollment record, learning request, supplemental learning, or program registration to determine whether to include the learning in a training plan. Use the Training Plan Status Options page to specify which statuses to associate with future plans and which statuses to associate with current plans.

   See Training Plan Status Options Page.

3. (FRA) Review learning classifications and training categories.

   French organizations are required to classify planned and actual learning according to legally defined learning classifications, such as competency check and experience validation, and training plan categories, such as job adaptation and job evolution. Enterprise Learning Management delivers learning classifications and training plan categories as system data.

   See Learning Classifications Page.

   See Training Plan Categories Page.

4. Define default values for estimating learning costs.

   For each learning environment, define the estimated (flat) cost per learner and the estimated hourly cost per learner on the Learning Environment - Defaults page. (Learning environments inherit the default costs values from the Install Defaults component.)

   See Learning Environment - Defaults Page.

5. When adding courses and classes to the learning catalog, complete the following tasks for learning that you want to include in training plans:

   - (Optional) Assign a default learning classification to each course and enter the estimated (flat) cost using the Item Details page.

See Creating Courses.

Note: You can use the Learner Roster page to associate a training classification with a learner's class enrollment record or update the classification.

- (Optional) Assign a global objective to each course on the Maintain Courses - Attributes page.

  Global objectives are used to sort data in the training plans. If a course has no global objective, all training related to that item is listed on the training plan under a Not Classified category.

  See Creating Courses.

- Enter the estimated cost, by delivery method, for each course.

  Update the estimated (flat) cost and the hourly cost per learner on the Delivery Method page.

  See Defining Delivery Methods for Courses.

- For each class, enter the duration of the constituent learning components.

  This step is only necessary when you want the system to calculate estimated costs based on the hourly amount.

6. To ensure that the system can capture costs for a learner's supplemental learning, you must enter a price and currency when you enter supplemental learning details on the Supplemental Learning (LM_ADHC_LRN_PG) page. The **Price** and **Currency Code** fields are available on this page only if you set **Price** and **Currency Lookup** to display on the Define Supplemental Learning - Details (LM_ADHC_SETUP_PG) page for the type of supplemental learning you are adding.

   See Maintaining Learning Records and Objectives Using Employee Self Service, Define Supplemental Learning - Details Page.

Plan Preparation Tasks

After you complete the implementation tasks, identify the demand for learning. Demand is based on enrollment records and learning requests. The system automatically takes into account any enrollment records that meet the training plan parameters and are designated to be included in the budget model on the Training Plan Status Options page.

To also use learning requests to quantify the demand for learning:

1. Use the Submit Learning Requests (LM_ADM_LRQ_ASSGN) component to enter learning requests.

   On the Submit Learning Requests - Details: Training Plan Attributes page specify if the request is eligible for inclusion in the training plans and enter additional attributes for the request.

   (FRA) If French features are enabled for your learning environment, and you are submitting a request for seats (rather than naming individual learners), you can complete the French fields at the bottom of the Training Plan Attributes page for head count information required by the Workers' Council.

2. Update learning requests submitted by learners and managers.

Use the Maintain Learning Request: Training Plan Attributes page to make these requests eligible for inclusion in training plans and enter the estimated costs, global objective, and other information.

See Understanding Learning Requests.

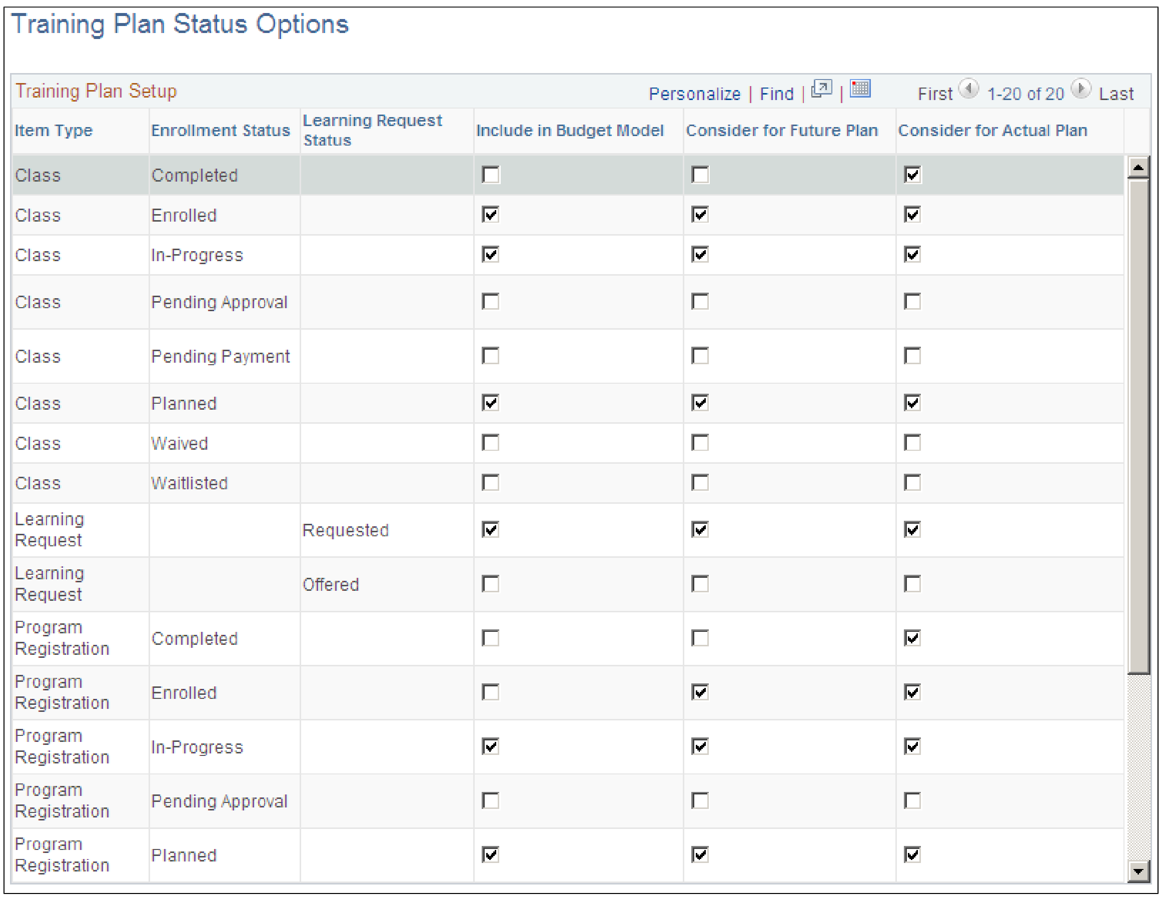
Training Plan Status Options Page

Use the Training Plan Status Options page (LM_FRA_TPLN_SETUP) to identify the status of class enrollments and learning requests to include in actual and future training plans.

Navigation:

Set Up ELM > **Catalog** > **Training Plan Status Options** > **Training Plan Status Options**

This example illustrates the fields and controls on the Training Plan Status Options page.



When you generate a training plan, you specify the plan's start date and an *as of* date. If the as of date is before the start date, the plan is considered a future plan, and the system considers the enrollment and request statuses defined in the Consider for future plan column on this page. If the as of date is after the start date, the plan is considered an actual plan, and the system considers the enrollment and request statuses defined in the Consider for actual plan column.

See Enrollment and Registration Statuses.

Field or Control	***Description***
Enrollment Status and Learning Request Status	This column displays the status of the enrollment record (class, supplemental learning, or program registration) or learning request for which you are defining reporting rules.
Include in Budget Model	Select to include the enrollment records and learning requests with this status in the Training Plan Budget Model.
Consider for future plan	Select to include the enrollment records and learning requests with this status in training plans prepared for future periods. For example, assume that you want to generate a plan for the year 2007. The plan's start date is January 1, 2007 and the end date is December 31, 2007. When you generate the plan with an as of date of October 2006, the plan is considered a future plan.
Consider for actual plan	Select to include enrollment records and learning requests with this status in actual training plans. For example, suppose the plan period is January 1, 2007 to December 31, 2007 and you generate the plan as of July 1, 2007, the middle of the period. Since the as of date is after the start date, the system refers to the rules you defined here.

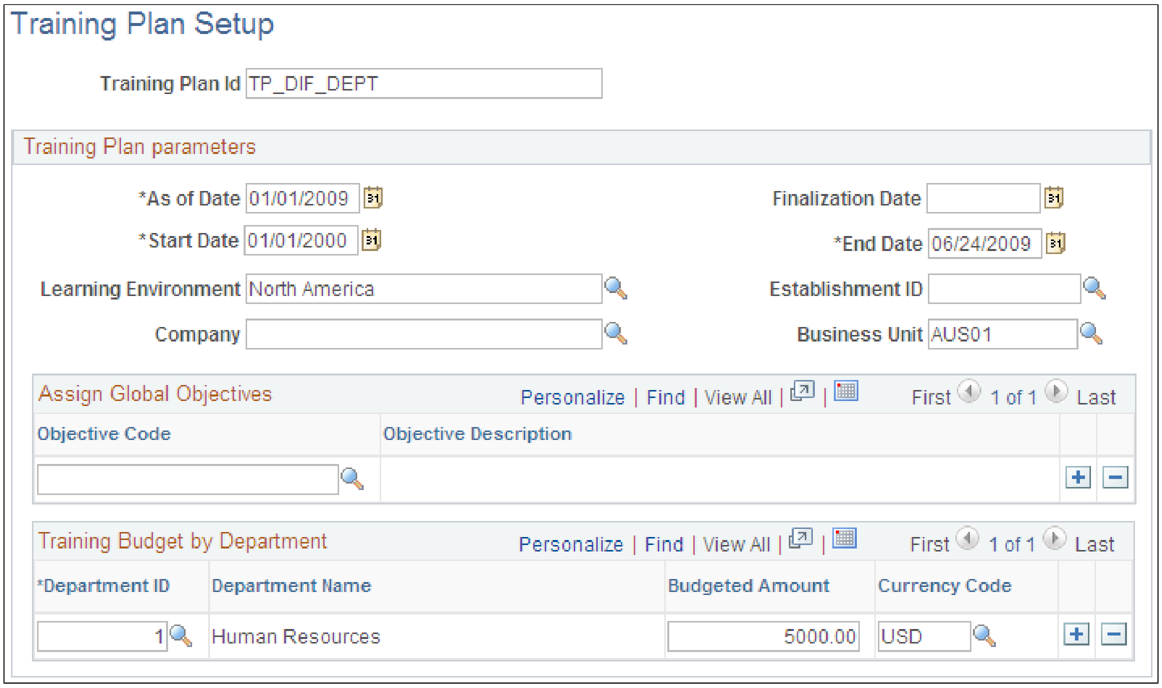
Training Plan Setup Page

Use the Training Plan Setup page (LM_TRNG_PLAN_SETUP) to define training plan parameters.

Navigation:

Enterprise Learning > **Learning Reports** > **Training Plan Setup** > **Training Plan Setup**

This example illustrates the fields and controls on the Training Plan Setup page.



Use this page to define a set of training plan parameters that you can use to run the Training Plan report or to perform analysis using the budget modeling tool.

Field or Control	***Description***

As of Date	This date serves two purposes:
	• It is used to filter the learning that appears in the report.
	To be included in the report, an enrollment record or learning request must have been created on or before this date. For classes, the creation date represents the date enrollment was initiated (rather than approved) or, in the case of planned learning, was added to a user's personal learning plan. For learning requests, the creation date represents the date the request was submitted.
	• It determines whether you are generating an actual (current) plan or a future plan so that the system can apply the appropriate set of status filters as defined on the Training Plan Status Options page.
	  • If the as of date is after the Start Date (entered in the next field), you are generating an actual plan.
	  • If the as of date is before the Start Date, you are generating a future plan.
	For example, if the As of Date is November 30, 2006 and the Start Date is January 1, 2007, the system knows that you are creating a future plan. It refers to the statuses defined in the Consider for future plan column of the Training Plan Status Options page to further filter the enrollment records and learning requests for the report.
	By selecting an as of date that is before today's date, you can view the plan as it was in the past. For example, if on November 28 you want to see the plan as of September 30, enter September 30 in this field. The extraction process will only consider enrollment records that existed on September 30 (provided the class begins and ends within the time frame specified by the Start Date and End Date fields).
	Note: If you generate the plan more than once using the same As of Date, it will reflect subsequent changes to enrollment. For example, if classes that were initially included have been dropped, they will no longer appear in the report.

Start Date and End Date	For an enrollment record to be included in the training plan report, the Start Date and End Date defined on the Class Details page must fall on or between the dates entered here. For a learning request to be included in the report, the Start date defined for the request must fall between the dates entered here.

Field or Control	***Description***
Finalization Date	This field provides a way to freeze a future training plan so that you can identify enrollment records and learning requests that are added after the plan's approval. Enter the cutoff date for including enrollments in the report. The system compares the creation date of each enrollment record or learning request that is selected for the report to the finalization date. If the creation date after the finalization date, the report includes a *N* in the In Plan column of the report. If you do not enter a finalization date, all training listed in the plan is considered to be part of the original plan. For example, say that on November 30 you complete the preparation of next year's training plan. You want to preserve the plan so that you can monitor changes that are made throughout the year. When you run the report again in February with a Finalization date of November 30, an *N* appears next to the enrollment records and learning requests that were created after November 30. (FRA) French customers can use this feature to identify the date on which the training plan is presented to the Worker's Council. New enrollments that occur after the finalization date are considered to be outside of the plan.
Learning Environment	To generate the plan for a particular learning environment, select the learning environment here. For an enrollment record to be included in the training plan report, the learner must be associated with the selected learning environment. For a learning request to be included in the training plan report, the request must be affiliated with the selected learning environment. By default, a learning request is affiliated with the requester's learning environment. The administrator can override the learning environment for a request through the Maintain Learning Requests component. (When a learning request represents more than one learner or seat, the same learning environment applies to the entire request.) **Note:** You must select a learning environment or a company.

Field or Control	***Description***
Establishment ID	To generate the plan for a particular establishment, select the establishment here. For an enrollment record to be included in the training plan report, the learner must be associated with the selected establishment. For a learning request to be included in the training plan report, the request must be affiliated with the selected establishment. By default, a learning request is affiliated with the requester's establishment. The administrator can override the establishment for a request through the Maintain Learning Requests component. (When a learning request represents more than one learner or seat, the same establishment applies to the entire request.)
Company	To generate the plan for a particular company, select the company here. For an enrollment record to be included in the training plan report, the learner's job must be associated with the selected company. For a learning request to be included in the training plan report, the request must be affiliated with the selected company. By default, a learning request is affiliated with the requester's company, which is based on job title. The administrator can override a request's company through the Maintain Learning Requests component. (When a learning request represents more than one learner or seat, the same company applies to the entire request.)
Business Unit	To generate the plan for a particular business unit, select the business unit here. For an enrollment record to be included in the training plan report, the learner must be associated with the selected business unit. For a learning request to be included in the training plan report, the request must be affiliated with the selected business unit. By default, a learning request is affiliated with the requester's business unit. The administrator can override the business unit for a request through the Maintain Learning Requests component. (When a learning request represents more than one learner or seat, the same business unit applies to the entire request.)

Assign Global Objectives

Select the global objectives for the training plan. Information in the plan is sorted by global objective. Learning with a global objective that differs from the plan's objectives is listed at the end of the global objectives. Learning that has no global objective is listed at the end of the report under the heading Not Classified. All global objectives that you select here are listed in the report, even if none of the reported learning is designed to meet the objective. This helps you spot unsupported global objectives and revise your training plan as needed.

Training Budget by Department

Enter the budgeted training amount for each department that is associated with the selected learning environment or company.

Field or Control	***Description***
Department Name	You must select at least one department. If the training plan is defined for a company, you can select only those departments associated with the company. If the training plan is defined by learning environment, you can select any department. The administrator is responsible for ensuring that the departments are appropriate for the learning environment.
Budgeted Amount	Enter the amount of the department's training budget for the period specified by the Start Date and End Date fields.
Currency Code	Select the currency for the department's training budget. If the forecasted learning costs are stated in another currency, the system will convert the costs to the currency selected here. For example, if the estimated cost for a learning request is stated in U.S. dollars (currency code USD) and you select currency code EUR here, the system converts this cost to Euros.

Generating Training Plan Reports

Page Used to Generate Training Plans

Page Name	***Definition Name***	***Usage***
Training Plan Page	LM_TRNG_PLAN_RCTL	Generate the Training Plan (LM_ TRPLN) reports.

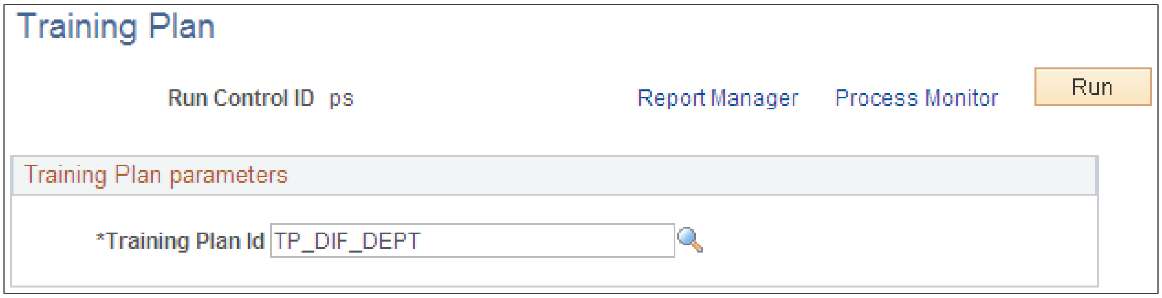
Training Plan Page

Use the Training Plan page (LM_TRNG_PLAN_RCTL) to generate the Training Plan (LM_TRPLN) reports.

Navigation:

Enterprise Learning > **Learning Reports** > **Training Plan** > **Training Plan**

This example illustrates the fields and controls on the Training Plan page.



Use this page to initiate the LM_TRPLN PSJob, which includes both the Training Plan Report (LMTPOBJV) and Training Report - Budget (LMTPLNBG). You define the parameters associated with a training plan ID on the Training Plan Setup page.

Modeling Training Plan Budgets

Page Used to Model Training Plan Budgets

Page Name	***Definition Name***	***Usage***
Training Plan Budget Model Page	LM_BUDGET_MODEL	Analyze training plan budgets.

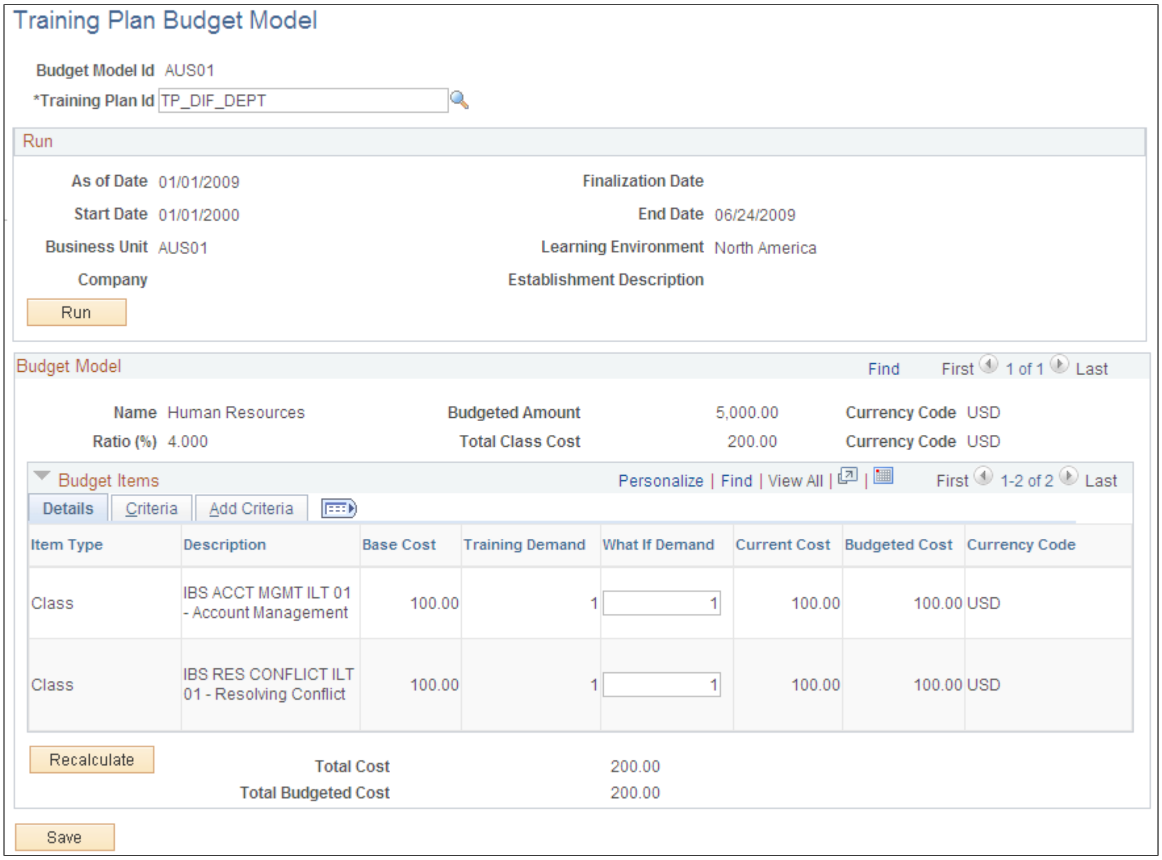
Training Plan Budget Model Page

Use the Training Plan Budget Model page (LM_BUDGET_MODEL) to analyze training plan budgets.

Navigation:

Enterprise Learning > **Learning Reports** > **Training Plan** > **Training Plan Budget Model**

This example illustrates the fields and controls on the Training Plan Budget Model page.



Field or Control	***Description***
Training Plan ID	Select a training plan ID. The system populates the fields in the Run group box based on the training plan ID that you select. These are the training plan parameters that the system uses to generate the budget model.
Run	Click to generate a budget model for each department associated with the training plan ID. Click this button for an existing budget model to update the current training demand so that it reflects enrollments and drops that occurred after the budget model was originally created.

Budget Model

The fields in this group box provide an overview of how a department's training budget compares to its actual class cost.

Field or Control	***Description***
Name	Displays the name of the department.

Field or Control	***Description***
Budgeted Amount	Displays the budget defined for the department in the training plan.
Currency Code	Displays the currency used for the budget.
Ratio	Displays the ratio between the **Total Class Costs** and the **Budgeted Amount.**
Total Class Costs	Displays the system-calculated class costs for the department based on current enrollment records and learning requests.

Budget Items: Details Tab

The Details tab of the Budget Items group box lists each item included in the **Total Class Costs** for the department.

Field or Control	***Description***
Item Type	Displays the type enrollment record or learning request.
Long Description	Displays the description of the enrollment record or learning request.
Base Cost	Displays the base cost of the enrollment record or learning request.
Training Demand	Displays the system-calculated demand for the enrollment record or learning request.
What If Demand	Enter hypothetical demand for the enrollment record or learning request.
Current Cost	Displays the current cost of the enrollment record or learning request. The system calculates this cost by multiplying the **Base Cost** times the **Training Demand.**
Budgeted Cost	Displays the hypothetical budgeted cost of the enrollment record or learning request. The system calculates this cost by multiplying the **Base Cost** times the **What If Demand.**

Field or Control	*Description*
Currency Code	Displays the currency associated with the cost of the enrollment record or learning request.
Recalculate	If you modify any values in the **What If Demand** column, click this button to recalculate the budget model based on your changes.
Total Cost	Displays the total of the **Current Cost** values for all the items contributing to the department's budget model.
Budgeted Total Cost	Displays the total of the **Budgeted Cost** values for all the items contributing to the department's budget model.

Budget Items: Criteria and Add Criteria Tabs

The Criteria and Add Criteria (additional criteria) tabs of the Budget Items group box display the learning request criteria counts for each class included in the model. Each field represents a different learning request criteria attribute value as defined on the Learning Request Criteria page. Because learning request criteria are defined for each learning environment, the fields that appear on these tabs depend on the learning environment associated with the training plan ID selected for the model. You can edit the counts for each learning request criteria attribute value, save them, and use them for the training plan reports.

Note: To be able to view and edit learning request criteria counts on the Training Plan Budget Model page, you must have French features enabled for the learning environment associated with the model's training plan ID.

Chapter 23

Managing Programs

Understanding Programs

This topic discusses:

- Programs
- Curricula
- Certifications
- Expiration rules for certifications
- Program rosters

Programs

A program represents a significant learning goal that can be achieved by completing multiple classes. Programs are especially useful for learners who need to obtain a particular certificate, license, skill, or competency. They guide learners along a specified learning path, presenting classes in a logical sequence.

Programs are divided into one or more sections, with each section having its own set of business rules. A section can include courses or another program.

As a user with learning administrator privileges, you can:

- Create programs and publish them in the learning catalog.
- Grant learners access to programs by specifying the valid learner groups to which the learner must belong.
- Specify which items or programs within a section are required and which are optional.
- Determine the recommended order in which learners should complete sections and the recommended order of items within each section.
- Decide whether to permit historical credit, equivalencies, and waivers for items or programs within a section.
- Define one or more high-level objectives that the learner achieves by completing the program.

Learners can sign up for programs through the catalog or their manager, or an administrator can sign them up. Once the learner is registered for the program, the system tracks the learner's progress toward completion.

To successfully complete a program, the learner must:

- Complete the required number of sections of the program.
- Complete the required number of items for each section of the program.
- Complete all core items successfully.

Both learners and managers can view the learner's progress on programs through the self-service pages. When the learner completes the last item within the program, the system updates the learner's program registration status to completed.

Unlike classes, programs have no enrollment limits or waitlisting.

Enterprise Learning Management supports two types of programs: curricula and certifications.

Curricula

A curriculum program guides the learner along a specific learning path over an unrestricted span of time to fulfill one or more objectives. Because a curriculum has no built-in time frame for completion, the learning is self-paced. The record of completion for a curriculum does not expire; therefore, the learner needs to only complete the curriculum once. If the program you want to create requires an expiration date, you should instead create a certification program.

You might define a Basics of Management curriculum program as follows:

- Section 1 (course section)

  A Manager's Primer

  Communicating A Shared Vision

  Communication Etiquette

- Section 2 (program section)

  Business Fundamentals program

This program includes two sections: Section 1, which contains three courses and Section 2, which contains another program.

Certifications

A certification program enforces a fixed time period within which the learner must complete all items to become certified in a particular area. A certification covers a specific topic or set of topics that usually include a test that the learner must pass. Certifications have an expiration date, completion rules, and recertification rules. Popular examples of certifications are Microsoft MCSE and Oracle Java Programmer certifications.

You might define a Sales Manager certification program as follows:

- Section 1 (program section)

  Account Management program

- Section 2 (course section)

Conflict and Confrontation

Strategic Selling

Territory Management

Final Test

You can also define completion and recertification rules such as the following: learners must complete the program 120 days or less after registration. If the learner successfully completes the certification, it remains valid for 365 days, after which the learner has 60 days to achieve recertification.

Related Links

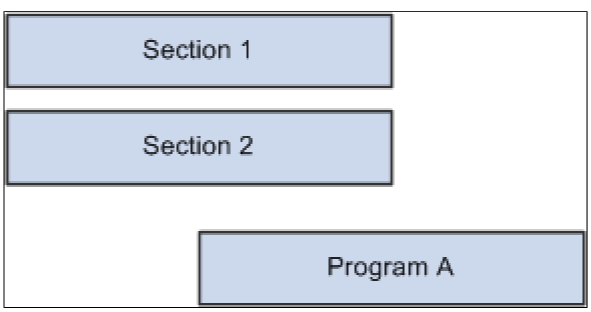
Understanding the Learning Component Completion Engine
Understanding the Class Completion Engine

Expiration Rules for Certifications

When you define a certification program, you specify the expiration rules and the time boundary within which learners must recertify. You can apply a single set of expiration rules to the entire program or define different expiration rules for each section of the program. With the later option, referred to as cascading expirations, an expiring section causes the parent section to expire but it cannot cause a child requirement to expire.

To illustrate, say that a certification program consists of Section 1 and Section 2. Section 2 includes Program A, as shown in the following diagram. If Program A expires, the parent certification program will expire; but section 1 will not expire. Likewise, if Section 1 expires, it will not expire Section 2.

This diagram illustrates two sections, one of which includes a program.



Recertification

When a completed certification reaches the recertification or "warning period," the learner must recertify within the time boundary defined for the certification. Requirements for recertification depend on the program's definition. You can have learners:

- Complete the entire certification program again.

  In this case, you define a single set of expiration rules for the entire program.

- Complete a recertification program.

With this method, you define one set of expiration rules for the program and create a second certification program that includes only those sections that are required for recertification.

- Complete expiring sections of the certification only.

  With this method, you define expiration rules for each section of the program. To recertify, learners do not need to repeat the certification program or register for a recertification program; they need only complete the expiring sections.

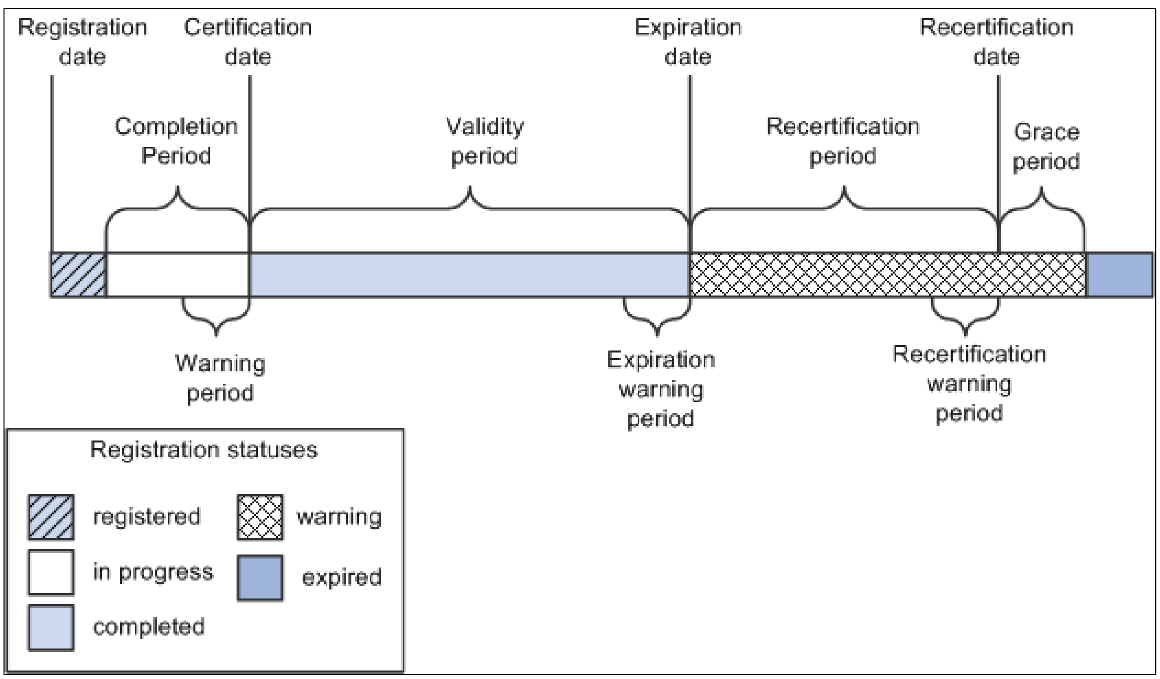
The system can generate warning notifications before a section or program expires, giving the learner time to enroll and complete the requirements before the certification expires. It can also generate notifications once the learner has completed these requirements.

If the learner does not complete the recertification requirements during the "warning period" and the certification expires, the learner must complete the entire certification program again to be recertified.

Expiration Dates

Numerous dates are associated with certifications.

The following diagram illustrates the relationship of the dates and time frames that you define when you create a certification program. In this example, it is assumed that there is one set of expiration rules for the entire certification program.



Program Rosters

Administrators can use the Administer Program Rosters component to view and update rosters for any programs within their learning environment. The permission lists that are associated with the administrator's role control the types of updates an administrator can make, such as dropping learners from programs, approving registrations, issuing program waivers, revoking or reissuing certifications, and issuing warnings.

Related Links

Understanding Program Rosters

Defining Programs

To define programs, use the Maintain Programs (LM_PROG) component.

Note: When you create a curriculum or certification program or modify certain aspects of an existing one, you must rebuild the catalog index before your changes are reflected in the learning catalog. See page discussions for lists of the modifications that require rebuilding the catalog index.

Pages Used to Define Programs

Page Name	***Definition Name***	***Usage***
Search Programs Page	LM_PRG_SRCH	Search for or add a certification program or curriculum program.
Maintain Programs - Details Page	LM_PRG_PG	Define general program information and details about payments, approvals, vendors, and external data. For certifications, also define completion and expiration information.
Update Program Page	LM_PRG_PUSH	Enter the date on which the system will notify learners of revised certification requirements.
Maintain Programs - Sections Page	LM_PRG_SCN_PG	Define sections for a program and the item details for each section.
Section Rule Details Page	LM_PRG_SCN_RULE_PG	Specify which sections of the program the learner must complete.
Maintain Programs - Attributes Page	LM_PRG_ATTRIB_PG	Link a program to one or more categories and specify the relevant keywords and objectives.
Maintain Programs - Prerequisites Page	LM_PRG_PRQ_PG	Identify other items, objectives, and programs that the learner must complete or that you recommend the learner complete prior to registering for this program.
Maintain Programs - Equivalents Page	LM_PRG_EQUIV_PG	Identify courses and programs that are equivalent to a given program.

Page Name	***Definition Name***	***Usage***
Maintain Programs - Notes/Attachments Page	LM_PRG_NANDA_PG	Enter notes for a program and attach files. You can optionally include notes and attachments elsewhere in the system, such as for an item or class.
Maintain Programs - Security Page	LM_PRG_SEC_PG	Identify the learning environment and learner groups that can access this program.
Clone Programs Page	LM_PRG_CLONE_PG	Copy a program and modify it to create a new program.

Related Links

Updating the Catalog Indexes

Understanding Program Creation

You can create programs in two ways: you can add a new program, or you can search for an existing program, clone it, and modify the cloned version.

Adding a Program

To add a new program:

1. Access the Program Search page.
2. Click the **Add Certification** link or the **Add Curriculum** link.
3. Define program details such as pricing, approval rules, and—for certification programs—completion rules.

   If you are defining a certification program that has a single set of expiration rules, you define the expiration rules at this time as well.
4. Define the sections that make up the program and, if applicable, the expiration rules for each section.

   Note: To have a single course expire before the other sections of a program, you must create a section with that course only.
5. Specify program attributes—category relationships, keywords for catalog searches, and learning objectives.
6. Identify required and recommended prerequisites.
7. Identify equivalent courses and programs.
8. Add notes and attachments to the program.

9. Define security for the program.

10. Activate the program by changing its status on the Manage Programs - Details page from Pending to Active.

11. Update the catalog search index.

    See Updating the Catalog Indexes.

Cloning a Program

To clone an existing program:

1. Use the Program Search page to locate the program.

2. Click the **Clone** icon on the tool bar.

3. Enter a new program code.

   This step may not be necessary depending on the settings on the Install Defaults component.

4. Identify the options to clone and click Continue.

5. When the Manage Program - Details page appears, make any changes that are needed.

6. Update the catalog search index.

   See Updating the Catalog Indexes.

Understanding Program Modifications

To modify a program:

1. Use the Program Search page to locate the program.

2. Update the program by modifying an existing effective-dated row or inserting a new effective-dated row.

   Note: Correction mode is the default state for the Manage Programs component. If Correction mode is not enabled on your permission list for this component, the default mode is Update/Display All.

3. (Optional) Enter a revision code for the program on the Manage Programs - Details page.

4. (Optional) You can automatically notify affected learners and their managers of program changes.

   - Click the **Update <Program>** button at the bottom of the Manage Programs - Details page.

   - Enter the date on which to notify learners.

     On the specified date, when you run the Send New Program Updates Notification (LM_CERT_UPD) process, the system will send an email notification to learners whose program status is Registered, In Progress, Completed, or Warning. The notice alerts learners to the program change, but does not explain what modifications have been made. Learners can view new requirements on the self-service program detail pages. For more information on program notifications, see Sending Program Notifications.

- (Optional) Update the certification status of affected learners.

  In some cases, you may want to require that learners complete the new requirements immediately rather than during the next recertification period. You can use the group action feature of the Administer Program Roster component to update the certification status of those who have completed the program to Warning. Learners will able to see their new certification status on the self-service pages.

Understanding Program Deletions

To delete a program, two conditions must be met:

- The program cannot be nested within another program.
- No registration records can exist for the program.

  Once a learner registers for a program you can no longer delete it, even if the learner is dropped from the program. You can, however, change the program status to *Inactive* on the Manage Programs - Details page. Inactive programs are accessible to administrators only.

To delete a program:

1. Use the Program Search page to locate the program.
2. Check for linked programs.

   If this program is contained within another program, a **Nested Program Relationship** link appears near the top of the Manage Programs - Details page. Click the link to display the names of the parent programs. You must remove this program from the parent programs before you can proceed.
3. Click the **Delete** link on any page of the Manage Programs component.
4. Update the catalog search index.

Prerequisites

To use the following features, you must first activate them at the system level or for the administrator's learning environment:

- Nested programs

  This feature enables you to include a program within another program. To set the system-wide default, use the **Allow Nested Program** check box on the Install Defaults - Details page. The setting for the administrator's learning environment determines whether this feature is available when creating a program. One level of nesting is supported, meaning that program A can contain program B, but program B cannot contain other programs.
- Cascading expirations

  With cascading expirations, you can define expiration rules at the section level, rather than for a certification program as a whole. To define a program with this feature, the Allow **Cascading Expirations** option must be enabled for the administrator's learning environment.

- Approvals

  To define approval requirements for program registrations, the **Program Registration** check box must be selected on the Install Defaults - Programs page.

- eSignature sign off

  To require that administrators validate manual updates to a learner's certification status, the **Require eSignature on Updates** option must be activated for the administrator's learning environment.

- Duplicate program codes

  To assign the same program code to more than one program, the **Program Code** option on the Install Defaults - Details page must be set to *Allowed.* If it is set to *Restricted by LE,* each program that is associated with the same learning environment must be assigned a unique code.

Note: The Install Defaults component also controls conditions for updating and tracking a learner's certification status.

Related Links

Install Defaults – General Page
Install Defaults – Programs Page
Learning Environment - Defaults Page

Maintain Programs - Details Page

Use the Maintain Programs - Details page (LM_PRG_PG) to define general program information and details about payments, approvals, vendors, and external data.

For certifications, also define completion and expiration information.

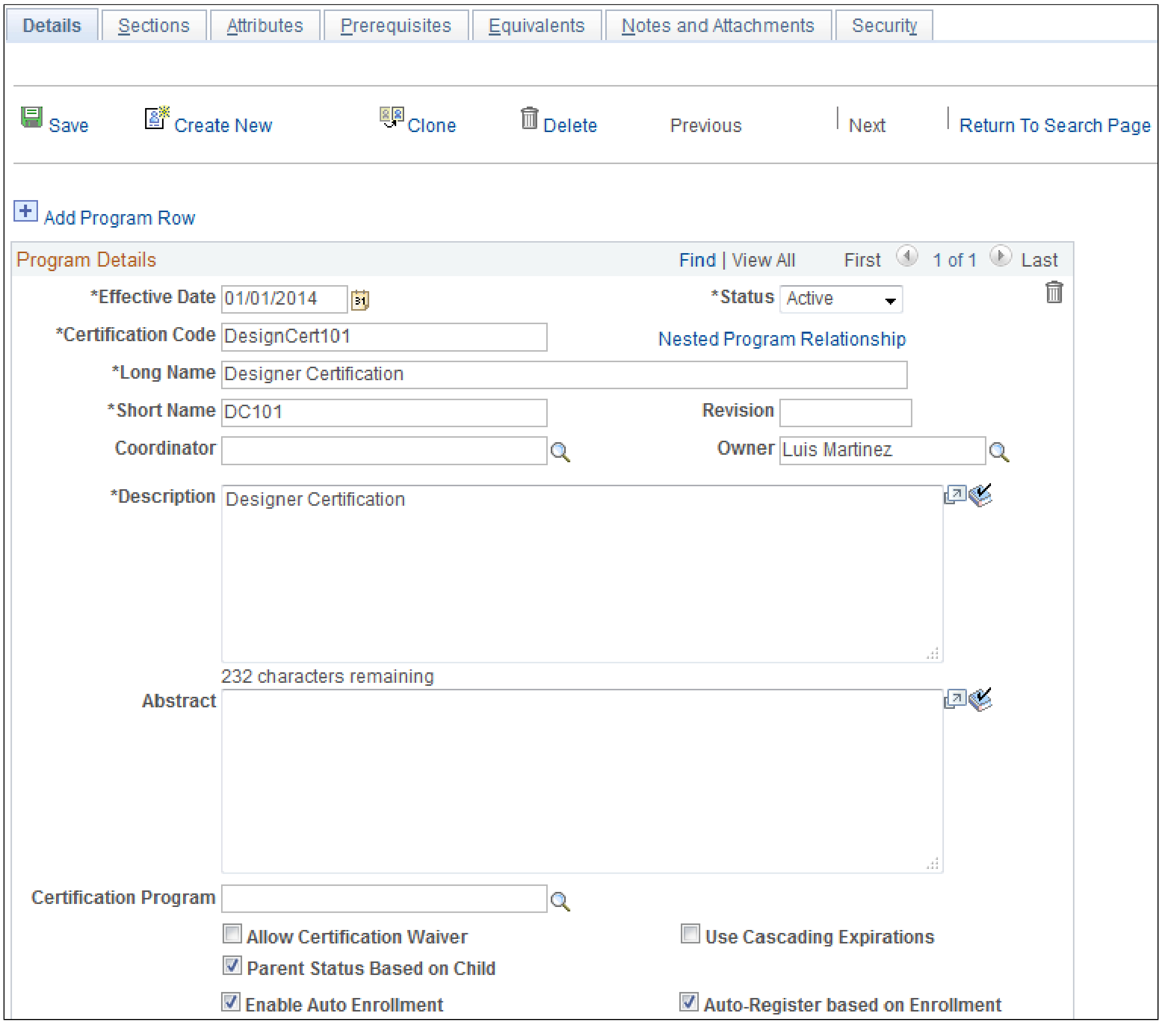
Navigation:

Enterprise Learning > **Catalog** > **Maintain Programs**

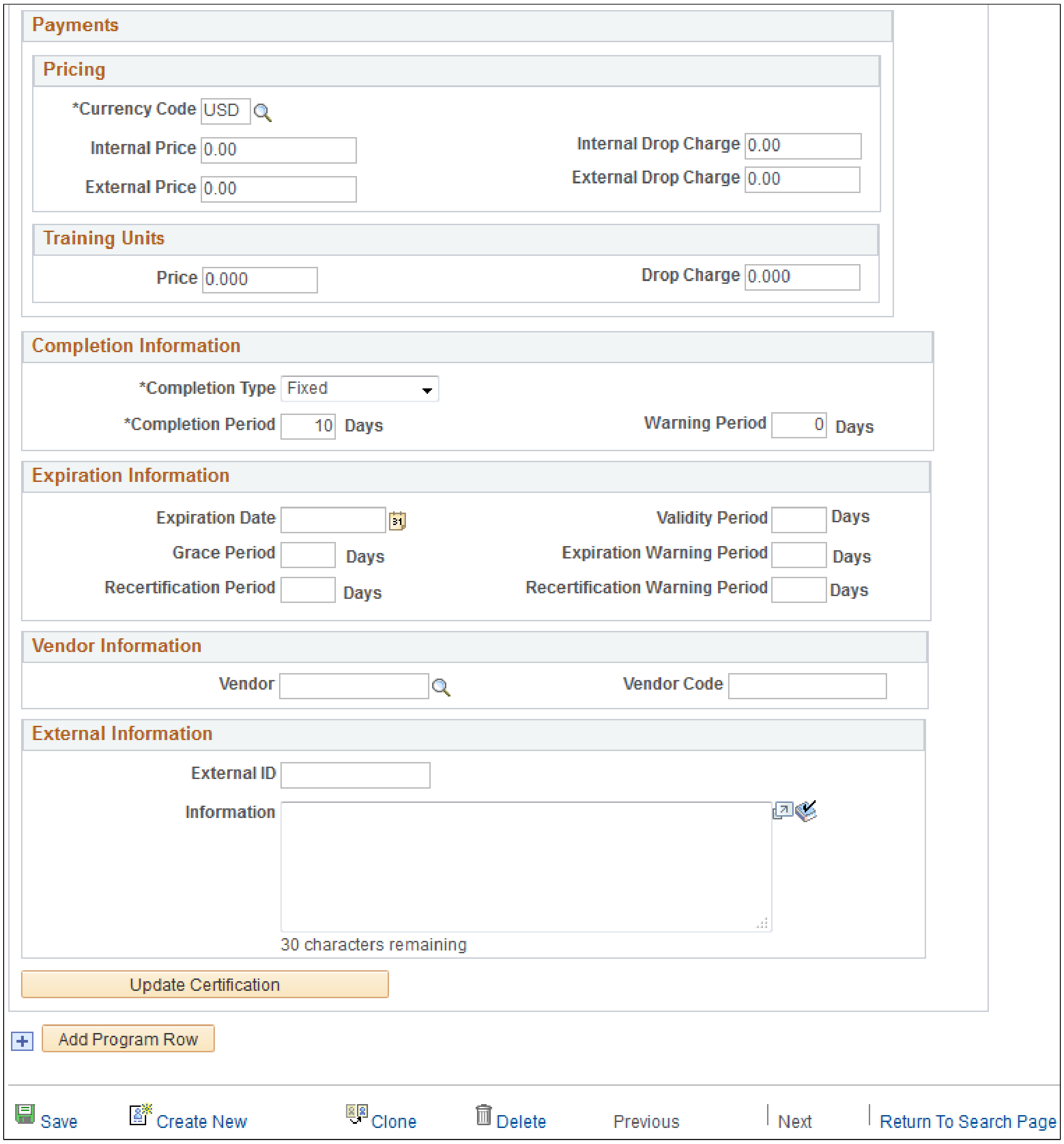
To edit an existing program, search for the program and click the **Title** link.

To create a new program, click the **Add Certification** or **Add Curriculum** button.

This example illustrates the fields and controls on the Maintain Programs - Details page (1 of 2).



This example illustrates the fields and controls on the Maintain Programs - Details page (2 of 2).



Note: When you modify the **Certification Code, Curriculum Code, Effective Date, Long Name, Short Name, Status, Certification Program,** or **Expiration Date** fields, you must rebuild the catalog index before the changes are reflected in the learning catalog. Changes to approval and payment information also require that you rebuild the index.

See Updating the Catalog Indexes.

Program Details

Field or Control	***Description***
Certification Code or Curriculum Code	Enter a code for the program. The system displays the code in the catalog. You may be required to enter a unique program code, depending on the program code option on the Install Defaults - General page. See Install Defaults – General Page.
Effective Date	The program displays in the catalog on or after the effective date, provided that the status is set to active.
Nested Program Relationship	This link is useful after you define a program. It only appears when this program is contained within another program. Click to see the names of the parent programs. Clicking a parent program opens the Items component so that you can view and edit that program. Because you cannot delete a program that is nested within another program, this link provides a convenient way to check for and remove the association with parent programs before you delete this program.
Long Name and **Short Name**	The system displays these program names in the catalog. For recertification programs, it's recommended that you include the term *recertification* in the name so that learners can easily spot these programs in the catalog.

Field or Control	***Description***
Status	Possible values are: *Pending:* Select to indicate that this program is under construction and not yet published. These programs are only accessible by administrators. When you create a new program, the system automatically sets the status to this value. *Active:* Select to indicate that this program is ready to be published in the catalog, making it available to learners for registration. The system displays only the programs with active status and valid effective date in the catalog. For this program to appear in the catalog search, you must regenerate the catalog index. *Inactive:* Select to indicate that this program is no longer in use. These programs are only accessible by administrators. See Updating the Catalog Indexes.
Coordinator	Select as a coordinator for this program an instructor within your learning environment, as defined on the Instructor page.
Revision	To track different revisions of this program, enter a distinguishing value. For example, if you revise a program twice you might enter *A* for the original, *B* for the first revision, and *C* for the second revision. It is recommended that you also change the effective date if you change a revision because effective dating provides true revision control.
Owner	As a reference, enter the name of the person responsible for constructing or managing this program.
Description	Enter a description of the program, such as topics covered and intended audience. This description is available to learners through the catalog.
Abstract	The abstract does not appear in the catalog.

Field or Control	***Description***
Certification Program	If you are creating a certification program, leave this field blank. If you are creating a recertification program, enter the name of the original certification that this recertification applies to. For example, if you are defining a recertification program for Sales Director called Sales Director Refresher, you would enter *Sales Director* in this field. You can define multiple recertification programs for a single certification program. This field is hidden when you select Use Cascading Expirations.
Approval Type	If registration in the program requires approval, select the approval process definition here. The approval process definition defines the conditions under which registration must be approved and who must give their approval. This field only appears when program registration approvals are enabled on the Install Defaults - Programs page.
Special Approver	This field is applicable when you select a value in the **Approval Type** field. You can designate any Enterprise Learning Management user as a special approver for registration. The approval process definition selected in the **Approval Type** field determines when the person named here is required to approve the registration. If the approval process does not require a special approver, the system ignores the name entered here.
Allow Certification Waiver or **Allow Curriculum Waiver**	Select to permit a manager or administrator to waive this program for a learner using the supplemental learning feature. (Administrators can always use the program roster to waive programs regardless of the selection here.) With a waived program, the learner gets credit for having the knowledge or experience equivalent to this program without having to register for it and complete it. The system marks the program as waived for the learner. When a program is waived, the system automatically assigns learning objectives that are associated with the program to the learner in *Met* status. A program waiver does *not* translate to waivers for the items that make up the program. See Understanding Supplemental Learning. Deselect this check box to indicate that learners cannot get a waiver for this program.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Use Cascading Expirations</td><td>(Certification programs only.) Select if you want to define expiration rules at the section level. Each section of courses can have its own expiration rules, which enables a single section of the program to expire rather than the entire certification. The check box appears only when the Allow Cascading Expiration option is enabled for the administrator's learning environment.

When selected, the Expiration Information group box on this page is hidden and appears on the Sections page instead.

Note: When you select this check box, the system selects the Parent Status Based on Child check box and makes it unavailable to deselect.</td></tr>
<tr><td>Parent Status Based on Child</td><td>Select to have the status of parent programs be based on the status of child programs. For example, if you select this check box and a child program expires, the parent program also expires.

If you deselect this check box, the status of parent program is not based on the status of child programs. With this check box deselected, the system sets the status of parent programs as follows:

• If one or more child programs has a status of Expired, the system sets the status of the parent program to Not Completed.

• If one or more child classes has a status of Enrolled, the system sets the status of the parent program to In-Progress.

• If one or more child programs has a status of Revoked, the system sets the status of the parent program to Revoked.

Note: This check box is available only if you select the Allow Nested Programs check box on the Install Defaults - Programs page. If you select the Parent Status Based on Child check box on the Install Defaults - Programs page, the Parent Based on Child check box on the Maintain Programs - Details page is selected by default.

See <u>Install Defaults – Programs Page</u>.</td></tr>
</table>

Field or Control	*Description*
Require eSignature on Updates	Select to indicate that manual updates to a learner's program status require eSignature validation. When an administrator uses the program roster to update a learner's program status, the system will prompt for the user's Enterprise Learning Management password. The check box appears only when the **Require eSignature on Updates** option is enabled for the administrator's learning environment.
Enable Auto Enrollment	Select to enable the system to automatically enroll learners in classes associated with the program when they register for it. This also enables the system to automatically register learners into programs nested within this program at the time of registration. Whether this check box appears for a program depends on the value that you select for the Program Auto-Enrollment Option field on the Install Defaults - Programs page. If this check box appears for a program, it is selected by default. See Install Defaults – Programs Page.
Auto-Register based on Enrollment	Select to enable the system to automatically register learners in this program when they enroll in classes associated with this program. Whether this check box appears for a program depends on the value that you select for the Auto-Register based on Enrollment field on the Learning Environments - Defaults page. If this check box appears for a program, it is selected by default. See Learning Environment - Defaults Page.

Pricing

Use this group box to enter the base price that the learner must pay to register for the program. When a learner registers for a program, the system tracks the learner's payment method and payment details. The price for the program is independent of the price for items that make up the program. The learner pays for each separately. No discounts exist for items or objectives completed before program registration. No charges are incurred for waiving a program.

Field or Control	*Description*
Currency Code	Select the currency for all monetary amounts that you define for this program. Currency codes are delivered with your system as translate values and you can modify them.
Internal Price	Enter the registration price for internal learners.
Internal Drop Charge	Enter the price charged if an internal learner drops the program.
External Price	Enter the registration price for external learners.
External Drop Charge	Enter the price charged if an external learner drops the program.

Training Units

Field or Control	*Description*
Price	Enter the price in training units for this program when the payment method is training units.
Drop Charge	Enter the training units charged if a learner pays in training units and then drops the program.

Completion Information

Completion information applies to certifications only.

Field or Control	*Description*
Completion Type	Select how you want to calculate the completion period for the certification: *Fixed:* Select to calculate the completion period from the date the learner registers. *Delayed:* Select to calculate the completion period from the date the learner completes the first item in the program.

Field or Control	***Description***
Completion Period	Enter the number of days within which the learner must acquire the certification. The system uses this value and the completion type to calculate the learner's target completion date for the certification. For example, let's say the completion period is 60 days and the completion type is fixed. If the learner registers on January 1, then the system immediately sets the target completion date to March 3 and the learner must complete the certification by that date. Let's change the completion type to delayed. If the learner registers for the certification on January 1 but does not complete the first item until February 1, then on February 1 the system sets the target completion date to April 3. Until then, no target completion date is set. Note that the target completion date is only calculated once, which is the first time an item within the program is completed successfully. Therefore, re-taking any item will not change the target completion date to a new date. If the learner does not complete all requirements for certification by the target completion date, the system updates the learner's completion status to not completed when the Process Program Updates process (LM_CERT_STAT) runs. The administrator has the ability to override the target completion date (extend it) through the program roster, provided the administrator has the appropriate security authorization. Historical credit does not affect the target completion date. If the program is set to allow historical credit and the registration process determines that the learner has already completed at least one item, the process marks that item as complete within the program. However, the target completion date remains blank. If the **Completion Type** field is set to delayed, the learner must enroll in and complete (or have waived) an item within the program in order to set the target completion date.
Warning Period	Enter the number of days in advance of the target completion date from which you want to send an email notification. This notification warns the learner to complete the certification requirements before time expires. If the learner has already completed the certification, the system no longer generates an email warning. For example, if the target completion date is October 14, enter *14* to notify the learner on October 1 that only two weeks remain to complete the certification.

Expiration Information

Expiration rules apply to certifications only. Use the fields in this group box to define the expiration rules for the certification program as a whole. When the **Use Cascading Expirations** check box is selected, this group box is hidden and you define expiration rules for each section of the program on the Sections page.

Field or Control	***Description***
Validity Period	Specify the number of days the certification remains valid for the learner after the learner completes the certification. The certification expiration date adjusts according to the completion date and this value. For example, if a learner completes a certification on May 1, 2006, and you have specified *365* in this field, the learner's certification will expire on April 30, 2006. Alternatively, you can enter a fixed expiration date in the **Expiration Date** field.
Expiration Date	Specify the fixed date on which the certification expires. Use this field as an alternative to specifying a validity period. The **Expiration Date** and **Validity Period** fields are mutually exclusive; if you specify the expiration date, the **Validity Period** field becomes unavailable to edit. Clear both fields to indicate that the certification has no expiration.
Grace Period	Enter the number of days the certification remains valid after the certification expiration date. During the grace period, the certification remains active in the learner's history. After the grace period, actual certification expiration occurs. The grace period gives the learner and the certifying entity time to validate certification efforts. For example, if the learner takes three days to send recertification test information to the certifying entity, the grace period allows the learner to remain certified during this time. This date never appears to learners.
Expiration Warning Period	Enter the number of days before certification expiration to indicate when you want the system to send a reminder notification to the learner about the upcoming certification expiration. Clear this field or enter *0* to indicate that you want the system to send the email on the actual certification expiration date.

Field or Control	***Description***
Recertification Period	Enter the number of days before actual certification expiration within which the learner must complete the recertification program to reinstate certification status. If the recertification period expires, the learner is ineligible for recertification and must complete the original certification again. For example, if the learner needs 30 days to complete a recertification program, set the Recertification Period to 30, to indicate when the learner should receive a notification that it is now time to begin recertification. The learner would then have 30 days to complete the recertification after they reach the *soft* expiration. Then, after the Grace Period expires, the certification status would changed to Expired. Clear this field or enter *0* to indicate that learners can obtain recertification at any time.
Recertification Warning Period	Enter the number of days before recertification expiration to indicate when you want the system to send a reminder notification to the learner. For example, if you enter 14, then 14 days before the Recertification Period ends the learner would receive a notification. Clear this field or enter *0* to indicate that you do not want the system to send this email notification to the learner.

Note: The certification expiration date defined by the **Validity Period** or **Expiration Date** field is the *soft* expiration date that the system communicates to the learner in notifications. Actual certification expiration (*hard* expiration), occurs after both the recertification and the grace periods have elapsed.

Vendor Information

Field or Control	***Description***
Vendor and **Vendor Code**	If this program is provided by an external vendor, select the name of the vendor and enter the vendor's code for this program. This information helps reconcile data from an external load.

External Information

Field or Control	*Description*
External ID and **Information**	If this program contains data imported or migrated from an external source, enter the external source's unique ID for this program plus any additional information from the external source that doesn't fit into this program structure. For example, you might enter in the **Information** field a description, notes, and comments from the external data source about this program, such as information about format, rules, historical certification codes, and so on. These fields are for administrator use only.

Update <Program>

As program requirements change, administrators can publish new or revised requirements to learners whose program status is *Registered, In Progress, Completed,* or *Warning.* After updating the requirements, click the **Update <Program>** button to access the Update Program page. This page lists the number of learners who are currently registered or who have completed the program. You can enter a date on which the Send New Program Updates Notification (LM_CERT_UPD) process sends an email notification to affected learners and their managers. The program's effective date appears by default. For more information on program notifications, see Sending Program Notifications.

The email does not describe the nature of the change, so you may want to use the email feature accessed through the program roster pages to send a second email that highlights the new or revised requirements.

Note: We recommend you insert a new effective date before updating existing requirements, if you want to track revisions to the program. Otherwise, all learners registered in the program will need to complete the new requirements once their status has changed.

See Understanding Program Modifications.

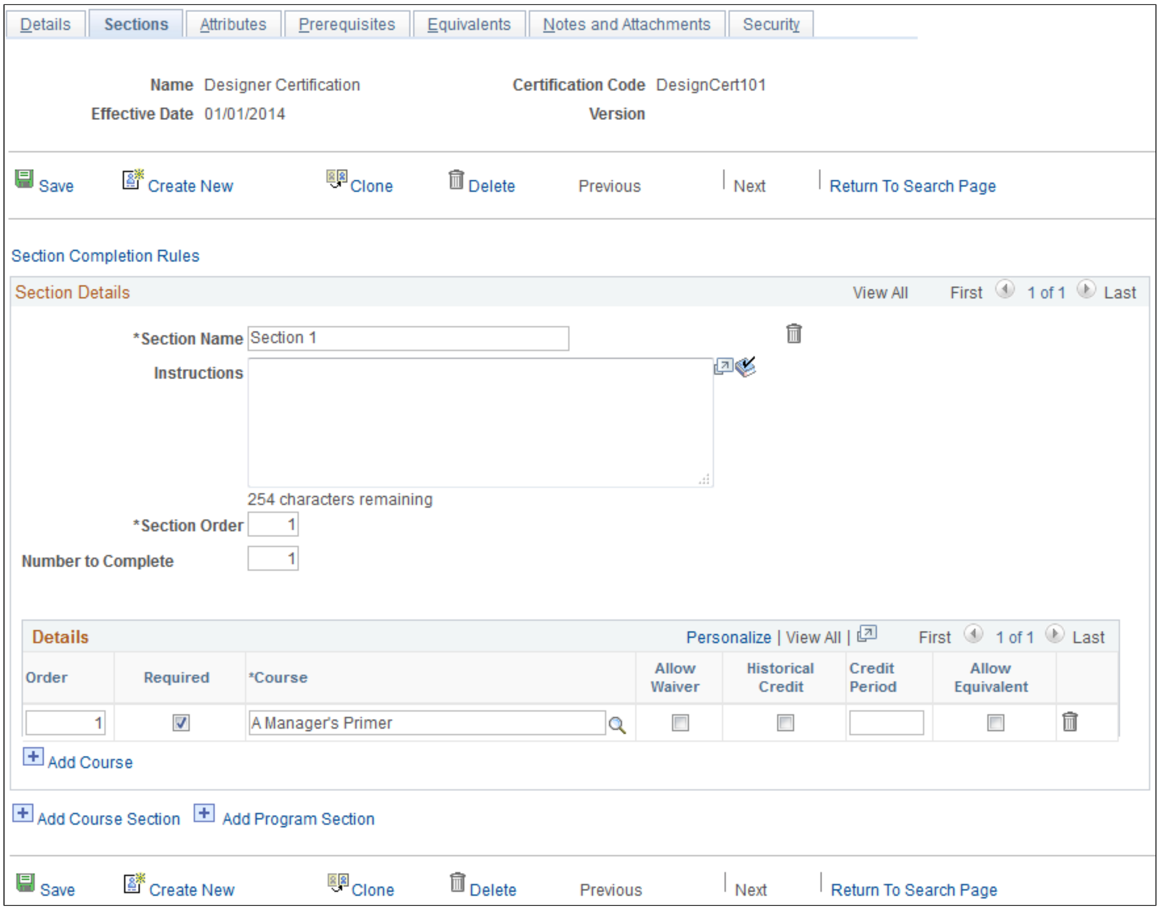
Maintain Programs - Sections Page

Use the Maintain Programs - Sections page (LM_PRG_SCN_PG) to define sections for a program and the item details for each section.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Programs** > **Sections**

This example illustrates the fields and controls on the Maintain Programs - Sections page.



Each program must include at least one section. Each section can include one or more courses or another program. To create a section that contains courses, click the **Add Item Section** link at the bottom of the page and identify the items to include. To create a section that includes a program, click the **Add Program Section** link and identify the program to include. (Separate sections are required for items and programs.) Classes are part of each course and cannot stand alone within a program.

Note: The **Add Program Section** link appears only when the nested program option is activated for the administrator's learning environment.

Section Details

Each item section must include at least one item. A program section can include only one program.

Field or Control	***Description***
Section Name	Enter a name for the section to distinguish it from other sections within the program. The system displays to the learner the section name in the catalog.

Field or Control	*Description*
Instructions	Enter instructions for the learner about how to complete this section. These instructions appear in the catalog and the learning plans of those who register for the program.
Section Order	Enter the recommended order in which the learner should complete this section of the program in relation to the other sections, going from lowest number to highest. This number determines the sequence in which sections are listed in the program's description in the catalog. The number for each section must be a whole integer and unique. The system does not enforce this order.
Items to Complete	Enter the total number of items that the learner must complete from this section to fulfill the requirements for the section. The number must include the required items for the section.

Item Details

Use this group box to select the items or program for the section.

Field or Control	*Description*
Order	This field applies to item sections only. Enter a number to specify the recommended order in which the learner should complete the items within the section. If two or more items have the same number, the learner can complete those items in any order before continuing to the next order number. The system does not enforce this order.
Required	For item sections, select this check box to specify that the item is required for completion of the section. Deselect to indicate that the item is optional within the section. For program sections, this check box is automatically selected.
Item or Program Long Name	Select the item or program. If selecting a program, you can only select from active programs that have no nested programs. In addition, the program you select must have an effective date that is equal to or less than the effective data of the parent program.

Field or Control	***Description***
Allow Waiver	Select to permit a manager or administrator to allow learners to waive this item. With a waiver, learners get completion credit for having the knowledge or experience equivalent to the item without actually having to complete the item. Waivers are granted through the Supplemental Learning component. Deselect this check box to indicate that the learner cannot waive this item.
Historical Credit	Select to permit the learner to get credit for this item or program if the learner has completed it before registration. The system grants the learner completion credit upon registration, provided that the learner completed the item or program (or the item or program was waived) within the historical credit validity period, as defined in the **Credit Period** field. Deselect this check box to require the learner to enroll in and complete the item or program regardless of whether the learner previously completed it. **Note:** If the learner enrolls in and completes classes for the same item or program multiple times, the system uses the most recent completion for the historical credit. **Note:** When creating a nested program, consider enabling the use of historical credit. If historical credit is not allowed, a learner who completes the nested program before registering for the parent program, may be prevented from meeting the parent program's requirements.
Credit Period	If you have allowed historical credit, enter the number of days from the date of registration within which the learner must have completed the item or program. For example, if you set this value to *90,* then the learner must have completed the corresponding item within the last 90 days before program registration. Leave this field blank if you want no time restriction on when the learner must have completed the item or program to receive historical credit.
Allow Equivalent	Select if the requirement can be satisfied by completing an equivalent course or program.

Expiration Information

Expiration rules apply to certification programs only. This group box appears for item sections when the **Use Cascading Expirations** check box is selected on the Maintain Programs - Details page.

Enter the expiration rules that pertain to this section only. The fields are similar to the expiration fields on the Maintain Programs - Details page; however, the rules you define here apply to this section only.

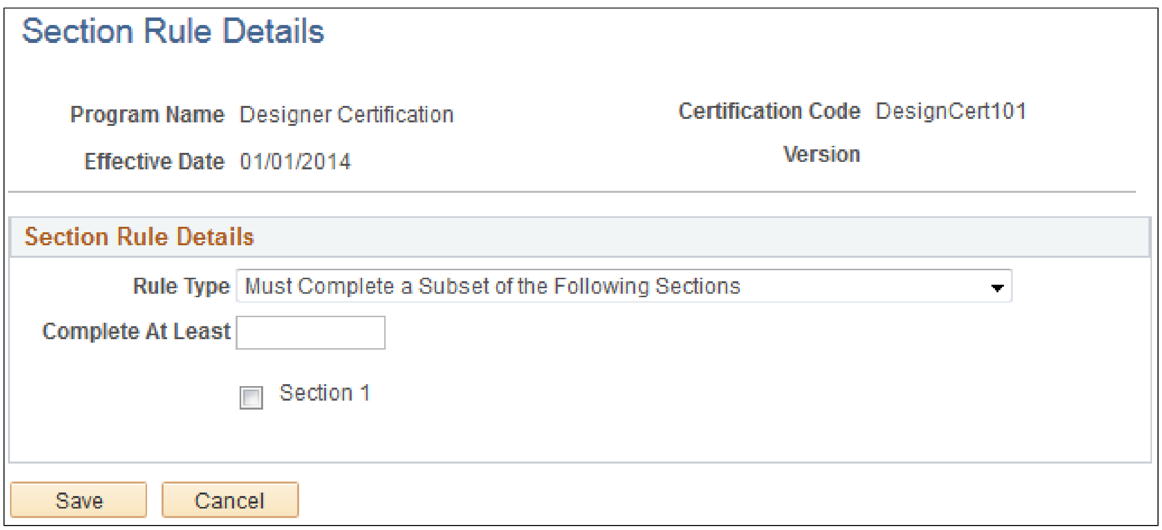
Section Rule Details Page

Use the Section Rule Details page (LM_PRG_SCN_RULE_PG) to specify which sections of the program the learner must complete.

Navigation:

Click the **Section Completion Rules** link on the Maintain Programs - Sections page.

This example illustrates the fields and controls on the Section Rule Details page.



Field or Control	*Description*
Rule Type	You can require that learners complete all sections that you specify or a subset of those sections. Select the appropriate rule: • *Must Complete a Subset of the Following Sections* • *Must Complete All of the Following Sections*
Complete at least	This field appears when you select *Must Complete a Subset of the Following Sections.* Enter the minimum number of sections the learners must complete.

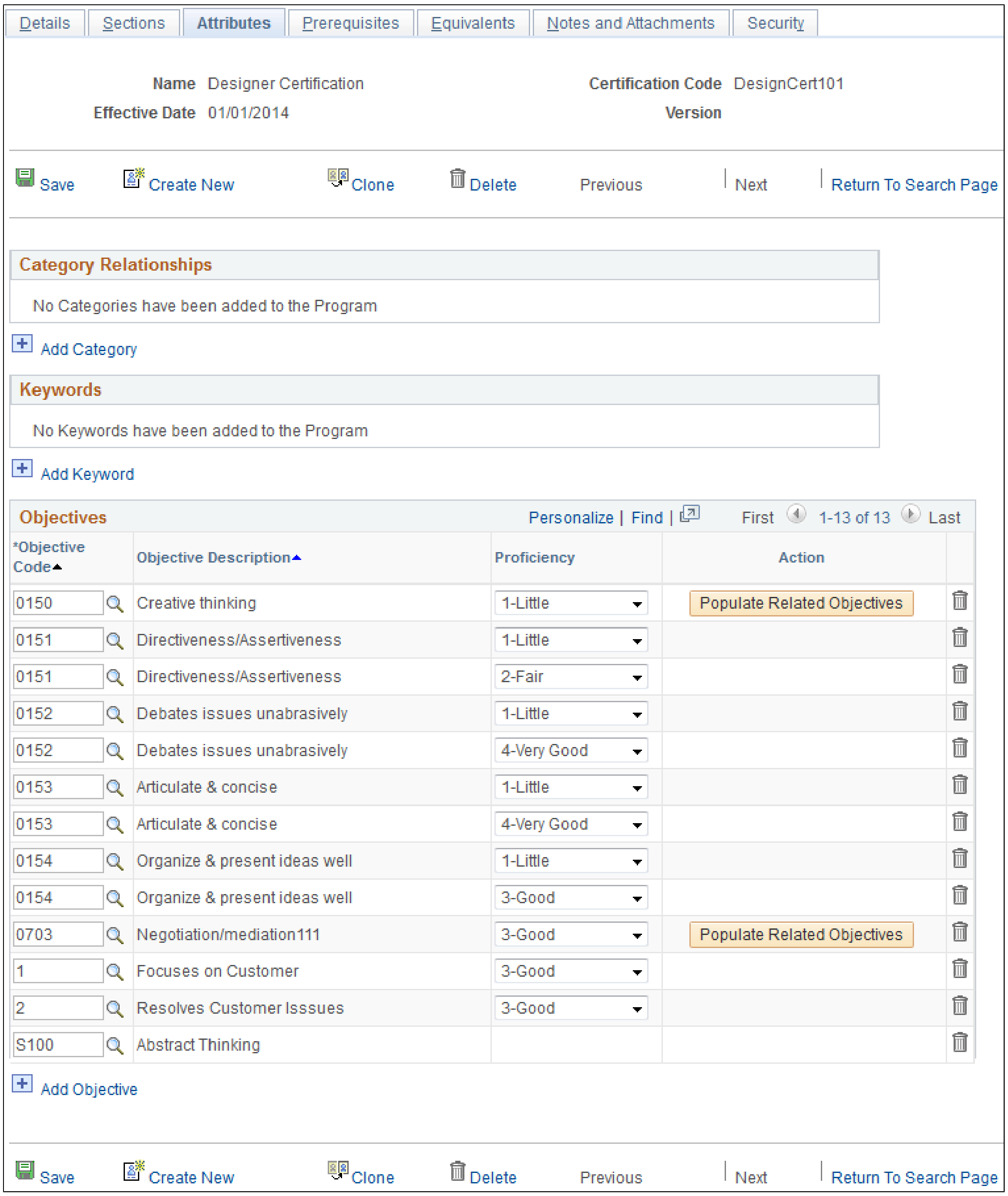
Maintain Programs - Attributes Page

Use the Maintain Programs - Attributes page (LM_PRG_ATTRIB_PG) to link a program to one or more categories and specify the relevant keywords and objectives.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Programs** > **Attributes**

This example illustrates the fields and controls on the Maintain Programs - Attributes page.



Note: When you add, remove, or modify categories, keywords, or objectives, you must rebuild the catalog index before the changes are reflected in the learning catalog.

See Updating the Catalog Indexes.

Category Relationships

Select the categories under which you want to list this program in the learning catalog.

See Defining Learning Categories.

Field or Control	*Description*
Category	Select the category within your learning environment to which this item belongs.

Keywords

Keywords help users locate this program when searching the catalog.

Field or Control	*Description*
Keyword Type	Select the keyword type or category.
Keyword	Select a keyword for this program. You can only select keywords that belong to the selected keyword type.

Objectives

Identify the objectives and, if applicable, corresponding proficiency levels that learners meet by completing this program. Learners receive credit for meeting the objectives that have been directly assigned to them.

A program's objectives have no relation to its constituent course objectives. The objectives at either level function independently of one another. Define objectives on the Objectives page.

Field or Control	*Description*
Populate Related Objectives	Click to add all the parent objective’s related objectives to the Objectives grid for the program. **Note:** This button appears only for objectives imported from PeopleSoft HCM that are associated with one or more sub-items (related objectives). For more information about related objectives, see Understanding Objectives.

Related Links

Assigning Objectives to Courses and Programs

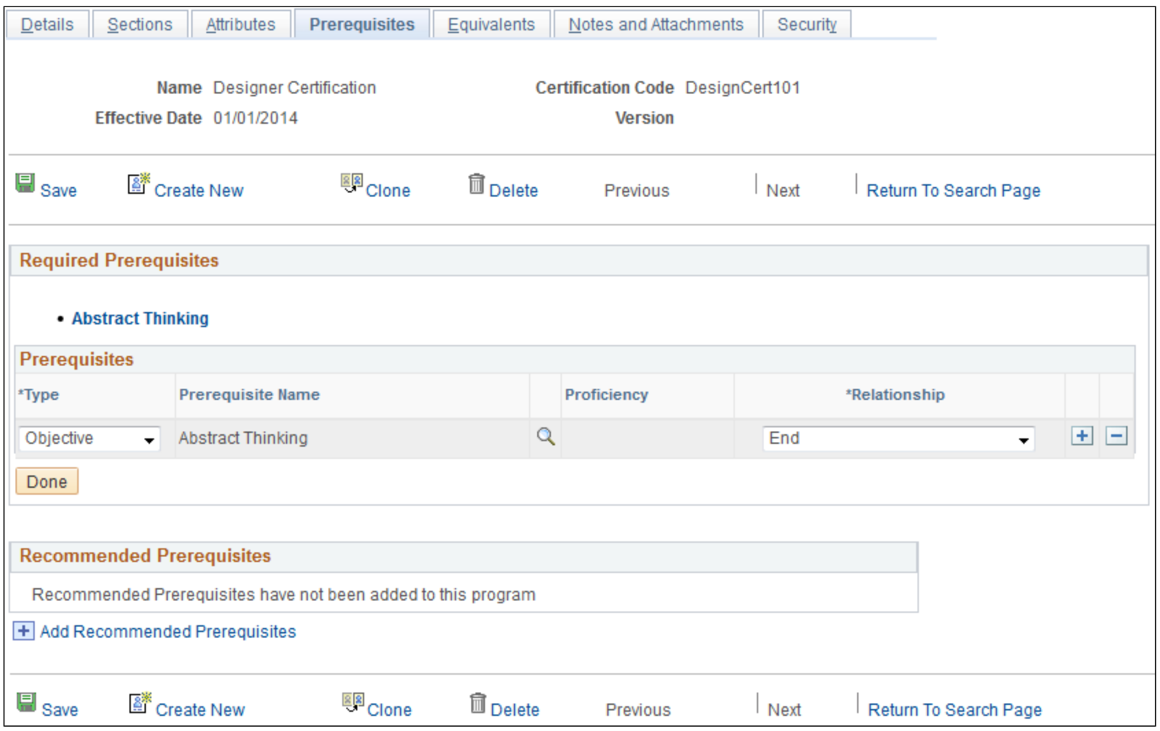
Maintain Programs - Prerequisites Page

Use the Maintain Programs - Prerequisites page (LM_PRG_PRQ_PG) to identify other items, objectives, and programs that the learner must complete or that you recommend the learner complete prior to registering for this program.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Programs** > **Prerequisites**

This example illustrates the fields and controls on the Maintain Programs - Prerequisites page.



Required Prerequisites

The program registration process checks that the learner has met all required prerequisites for this program, before confirming the learner's registration. The registration process does not check prerequisites for courses within a section of a program because the course prerequisites function independently of the program prerequisites. Administrators can override prerequisites during group and mass enrollment. Managers cannot override prerequisites for a learner directly, but can use the Supplemental Learning page to give learners waivers on courses, objectives, and programs.

To add a prerequisite for the program, click the **Add Required Prerequisites** link and enter the prerequisites.

Field or Control	Description
Type	Select the type of prerequisite: *Course, Objective,* or *Program.*
Prerequisite	Select the name of the prerequisite course, objective, or program.
Proficiency	This field pertains to objectives that are selected as prerequisites. If the objective is associated with a rating model, select the proficiency level.
Relationship	Select one of the following values to build a phrase expressing how prerequisites within this program relate to each other: • Select *End* if this is the last prerequisite. • Select *And* if there are additional prerequisites. • Select *Or* if there are multiple prerequisites and the learner needs to complete any one of them.
Done	Click to hide the data entry fields for required prerequisites.

Recommended Prerequisites

These fields are similar to the Required Prerequisites fields. Use them to select courses, objectives, and programs that you recommend learners complete before taking the current program. Recommended prerequisites that the learner does not meet do not prevent the learner from registering for the program.

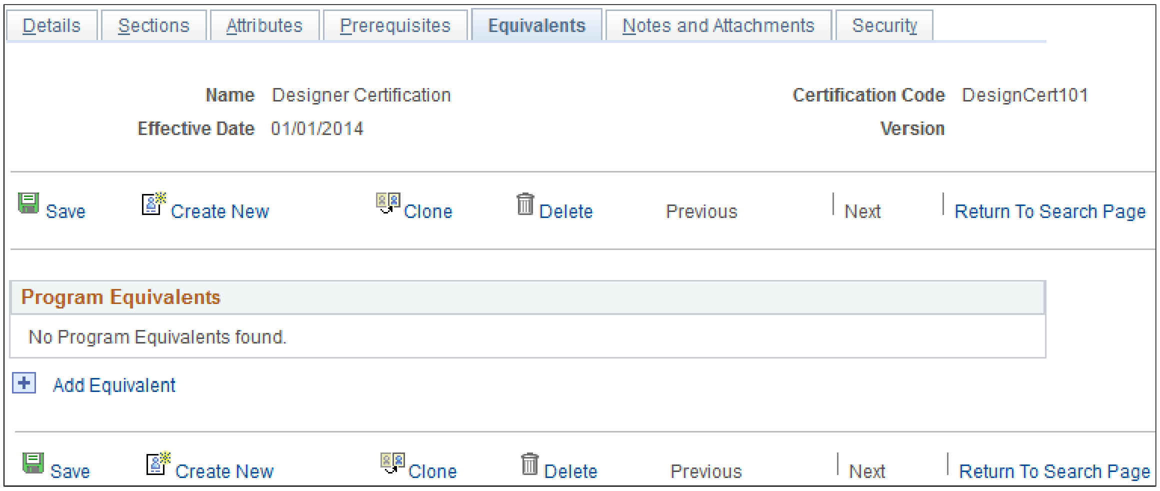
Maintain Programs - Equivalents Page

Use the Maintain Programs - Equivalents page (LM_PRG_EQUIV_PG) to identify courses and programs that are equivalent to a given program.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Programs** > **Equivalents**

This example illustrates the fields and controls on the Maintain Programs - Equivalents page.



Select the courses or programs that are equivalent to this one. When a program or course has a prerequisite, learners can complete an equivalent program or course to meet the prerequisite.

If the learner completes more than one equivalent item or program, the system refers to the item or program that was completed most recently, for the certification requirement.

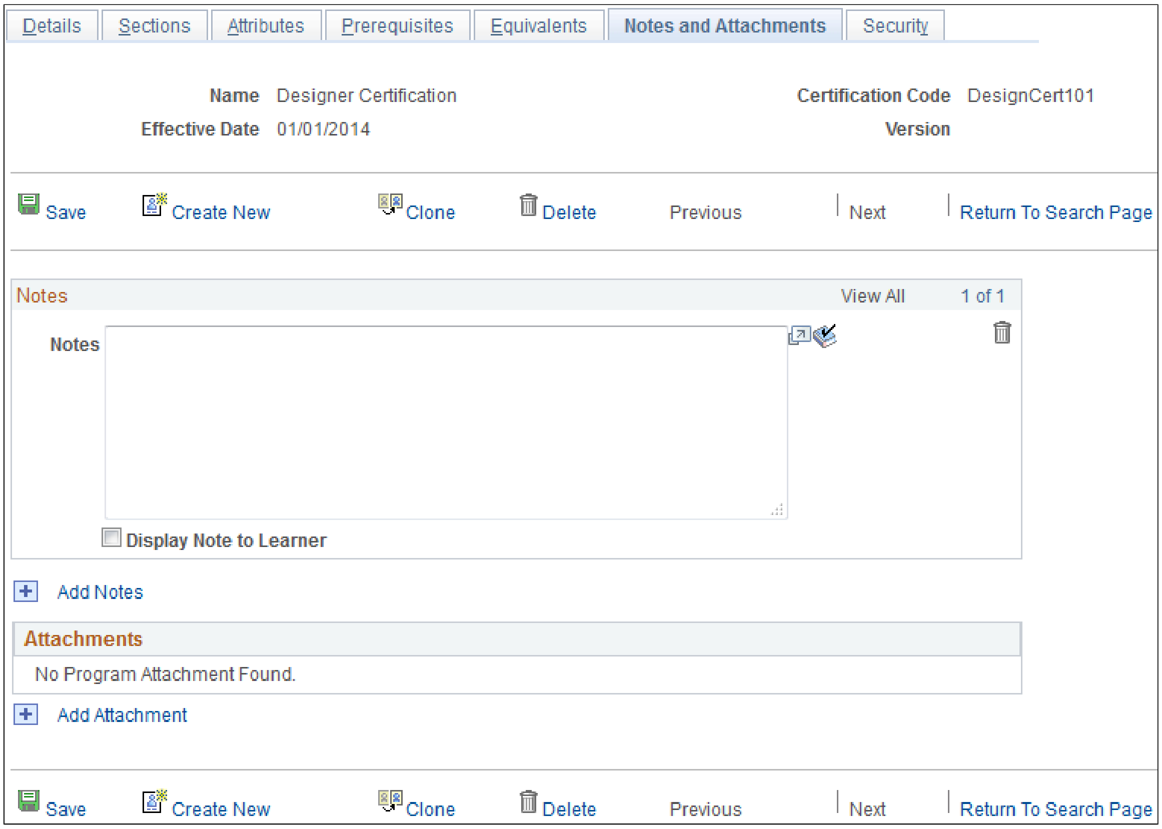
Maintain Programs - Notes/Attachments Page

Use the Maintain Programs - Notes/Attachments page (LM_PRG_NANDA_PG) to enter notes for a program and attach files.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Programs** > **Notes/Attachments**

This example illustrates the fields and controls on the Maintain Programs - Notes/Attachments page.



Notes

Enter any notes about the program and, if applicable, select the **Display Note to Learner** check box for the note.

Attachments

To add an attachment, click the **Add Attachment** link. Then either enter the path to and the name of the attachment, or click the **Browse** button to locate the attachment, and click the **Upload** button. After you upload the attachment, the system displays the attachment file name in the description field. You can edit this description.

To display attachments to the learner, select the **Display** check box next to the attachment description.

To delete an attachment, select the check box next to the attachment description and click the **Delete Attachment** button.

Other aspects of attachments are discussed in the Managing Classes topics.

Note: Your system configuration determines the size of the files that you can attach.
See the product documentation for *PeopleTools: PeopleCode Developer's Guide*.

Related Links

Understanding Attachments

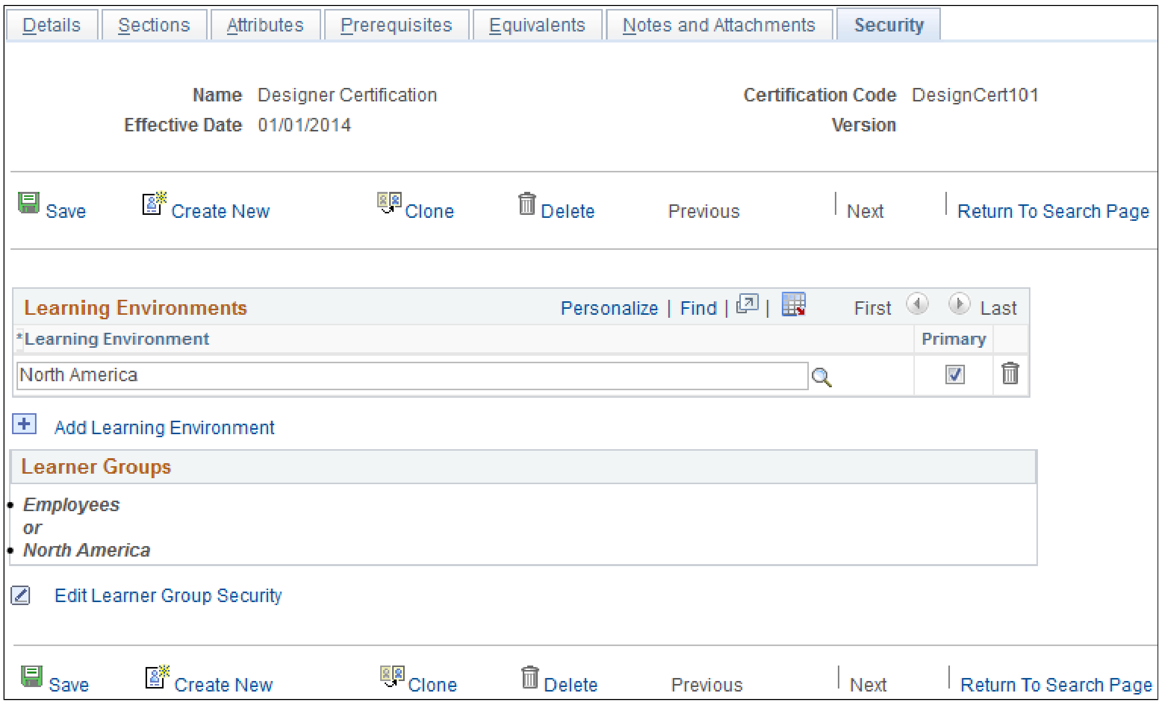
Maintain Programs - Security Page

Use the Maintain Programs - Security page (LM_PRG_SEC_PG) to identify the learning environment and learner groups that can access this program.

Navigation:

Enterprise Learning > **Catalog** > **Maintain Programs** > **Security**

This example illustrates the fields and controls on the Maintain Programs - Security page.



Note: When you add or remove learning environments or learner groups, you must rebuild the catalog index for programs before the changes are reflected in the learning catalog.

See Updating the Catalog Indexes.

Learning Environments

Use these fields to specify the learning environments for which this program is valid.

Field or Control	Description
Learning Environment	For new programs, the system displays the administrator's learning environment as the default. By adding other learning environments, you enable administrators of those environments to update this program and associate classes with it as well. **Important!** If you are creating a program, be careful not to delete your learning environment. If it's not, you will lose the ability to access this program after you leave this component.
Primary	This object must be associated with at least one learning environment. In this field, select the primary environment with which this object is associated. You cannot remove the primary learning environment from this page without first selecting another environment as the primary. You can change the primary learning environment on this page at any time.

Learner Groups

Identify which learner groups can access this program in the catalog. The administrator can select from the learner groups that have been defined for any of the learning environments associated with the program. To access this program in the catalog, a learner must meet the group membership criteria that you define here.

Learner groups assigned to the program are not automatically assigned to constituent courses and programs. For example, you might grant the North America learner group access to the Professional Development curriculum, but only a subset of learners within the North America group may be able to complete the program. This is possible if only some members of the North America group are also members of learner groups associated with the courses in the program. Assigning a learner group to the program does not mean that all learners in that group will have access to all items and programs within the program.

It is the responsibility of the administrator to ensure that there are no conflicts or inconsistencies between learner groups assigned to the program and learner groups assigned to constituent courses and programs.

To add learner groups, click the **Add Learner Group Security** link.

Field or Control	Description
Name	Select the name of the learner group.

Field or Control	***Description***
Relationship	Specify how this learner group is related to others in the list when used to determine whether or not a person has access to the program Values are: *And:* A learner must be a member of both this learner group and the next in the list. *Or:* A learner must be in this learner group or the next in the list. *End:* A placeholder for the last learner group in the list. The system ignores any learner groups that are listed after *End.* To define security such that a learner must be a member of learner group A, and a member of learner group B or C, you must reuse learner group A. The resulting security would look like this: Learner group A *and* Learner group B *or* Learner group A *and* Learner group C *end.* **Important!** Associate the program with at least one learner group. If you do not select a learner group, learners cannot access this program.
Done	Click to hide the data entry fields for learner groups.

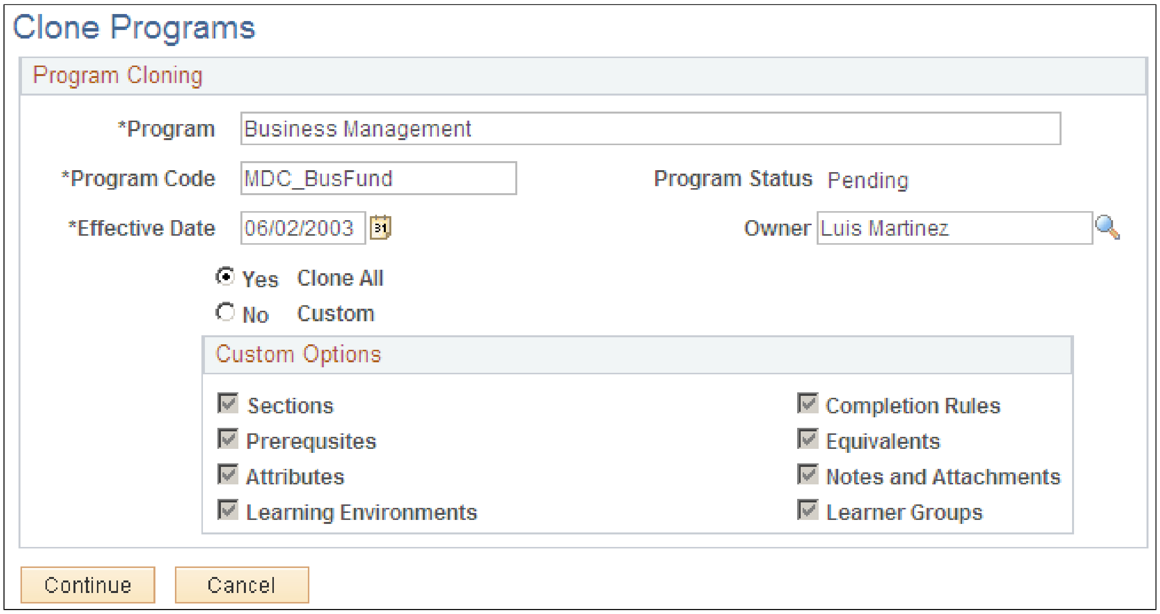
Clone Programs Page

Use the Clone Programs page (LM_PRG_CLONE_PG) to copy a program and modify it to create a new program.

Navigation:

Click the **Clone** link on the Details page.

This example illustrates the fields and controls on the Clone Programs page.



See Understanding Program Creation.

Field or Control	***Description***
Program	Enter the name of the new program. By default, the system displays the name of the copied program.
Program Code	Enter the code for the new program. By default, the system displays the code for the copied program. The value that you enter must be unique if the Program Code Option on the Install Defaults - General page is set to restricted. See Install Defaults – General Page.
Effective Date	Enter the effective date of the new program. By default, the system displays the effective date of the copied program.
Owner	By default, the system displays the name of the administrator who is cloning the program.
Program Status	The system automatically sets the status of the new program to *Pending*. After you save the new program, update its status on the Maintain Program - Details page.
Clone All or Custom	To copy all values from the existing program, select **Clone All.** To copy selected values, select **Custom.**

Custom Options

The check boxes in this section become available when you select the Custom option. Select the program attributes that you want to copy from the existing program to the new program. When you click Continue, the Details page appears with the cloned data, which you can update.

Note: Selecting Sections is an *all or none* option; either all the sections are cloned or none of the sections are cloned. If you do not select Learning Environments, the new program inherits your learning environment and corresponding learner groups.

Updating Certification Registration Statuses

To have the system update learners' certification registration status to Not Completed, Expired, or Warning, use the Program Status Updates (LM_RCTL_CURR_STAT) component.

Page Used to Update Program Registration Statuses

Page Name	***Definition Name***	***Usage***
Update Program Statuses Page	LM_LECR_RCTL_STAT	Process registration status updates for programs.

Understanding Registration Status Update Processing

Use the Update Program Statuses component to:

- Update learners' registration statuses to Not Completed for certifications the learner does not complete by the target completion date.

  The system compares target completion date, today's date, and the registration status of the program. If the target completion date has passed (target completion date is one day before current date) and the learner's registration status is Registered or In-Progress, the process updates the registration status to Not Completed and generates the Registration Incomplete email to be sent to the learner.

- Update learners' registration statuses to Expired when the grace period ends.

  When the current date is equal to the end of the grace period, the system updates the registration status to Expired and generates the Certification Expiration email to be sent to the learner.

- Update learners' registration statuses to Warning when the beginning of the expiration warning period is reached.

  When the current date is equal to the number of days before the expiration date as defined in the Expiration Warning Period field on the Program Details page, and the learner's certification status is Completed, the system updates the registration status to Warning and generates the Certification Warning email to be sent to the learner.

The generated emails go into the enrollment notification queue and are sent to learners when the LM_NOTIFY process runs. Use the Enrollment Notifications run control page to run the LM_NOTIFY process.

Important! You should schedule this process to run at least once a day. The process updates only the programs whose target completion date was one day earlier.

Update Program Statuses Page

Use the Update Program Statuses page (LM_LECR_RCTL_STAT) to process registration status updates for programs.

Navigation:

Enterprise Learning > **Program Status Updates** > **Update Program Statuses**

To process program registration status updates:

1. Add a new run control ID or search for and select an existing one.
2. Enter the date for which you want to run the process.

   When scheduling the job to run on a nightly basis, make sure this field is blank. In this case the system uses the current date every time it runs. For non-recurring instances, this field gives you the ability to process status updates in a back-dated environment. For example, if you did not run the process over the weekend, you can run the process twice—once for each date missed. When backdating a run, you must specify the exact date missed. If you leave this field blank, the system will use the current date.
3. Click **Run.**

   The system displays the Process Scheduler Request page.
4. In the **Process List** grid, select the Application Engine processes you want to run and click OK. The choices are: Set Program to Incomplete (LM_CERT_STAT), Set Certification to Expired (LM_EXPR), and Set Certification to Warning (LM_WARN).

   See Understanding Registration Status Update Processing.

Sending Program Notifications

Pages Used to Send Program Notifications

Page Name	***Definition Name***	***Usage***
Ad hoc Program Notifications Page	LM_PRG_NOTIF	Send email messages about the program to learners and other interested parties.

Page Name	*Definition Name*	*Usage*
Program Notifications Page	RCTL_CURR_NOTIF	Run the program notification processes to send learners reminders and warnings about their certification status.

Understanding Program Notifications

This topic discusses the three types of program notifications:

- Ad hoc program notifications.
- Reminder and warning program notifications.
- Status update program notifications.

Note: Enterprise Learning Management delivers predefined templates in PeopleTools for program notifications.

Ad Hoc Program Notifications

Use the Ad Hoc Program Notifications page accessible through the program roster components to send email messages about a program to registered learners and interested parties.

Reminder and Warning Program Notifications

Use the Program Notifications component to send reminders and warning emails to learners about their certifications and recertification statuses. The system generates these notifications based on delivered workflow templates. Through this component, you can run the following program notifications processes:

Process Name	*Object Name*	*Description*
Certification Completion Warn (certification completion warning)	LM_CMPL_WRN	Generates reminder emails to learners about their upcoming deadlines for certification completion.

Process Name	Object Name	Description
Send New Program Updates Noti (send new program updates notification)	LM_CERT_UPD	Generates emails to learners notifying them that changes have been made to the program they have completed or for which they are registered. If the Re-Evaluate Completed Registration check box is selected on the Install Defaults – Programs Page, and the administrator added one or more requirements for a program, this process also changes the status of that program from *Completed* to *Warning* for learners who have already completed the program.
Certification Expiration Warning	LM_EXPR_WRN	Generates emails to learners warning them of their upcoming certification expiration.
Re-Certification Warning Notif (re-certification warning notification)	LM_RECRT_WRN	Generates emails to learners warning them of their upcoming deadline for completing a recertification.

Important! You should schedule these processes to run at least once a day.

Status Update Program Notifications

Use the Enrollment Notifications component to process program notifications emails for status updates. When there is a status change for a learner's program registration, the system automatically generates a program notification to alert the appropriate users of the change. The system generates these notifications based on delivered workflow templates. These program notification emails are queued, and you must run the Enrollment Notifications Application Engine process (LM_NOTIFY), through the Enrollment Notifications component, to process the notifications.

See Sending Enrollment, Registration, and Waitlist Notifications.

Important! You should schedule the Enrollment Notifications process to run at least once a day.

Related Links

Enrollment Workflow Notifications

Ad hoc Program Notifications Page

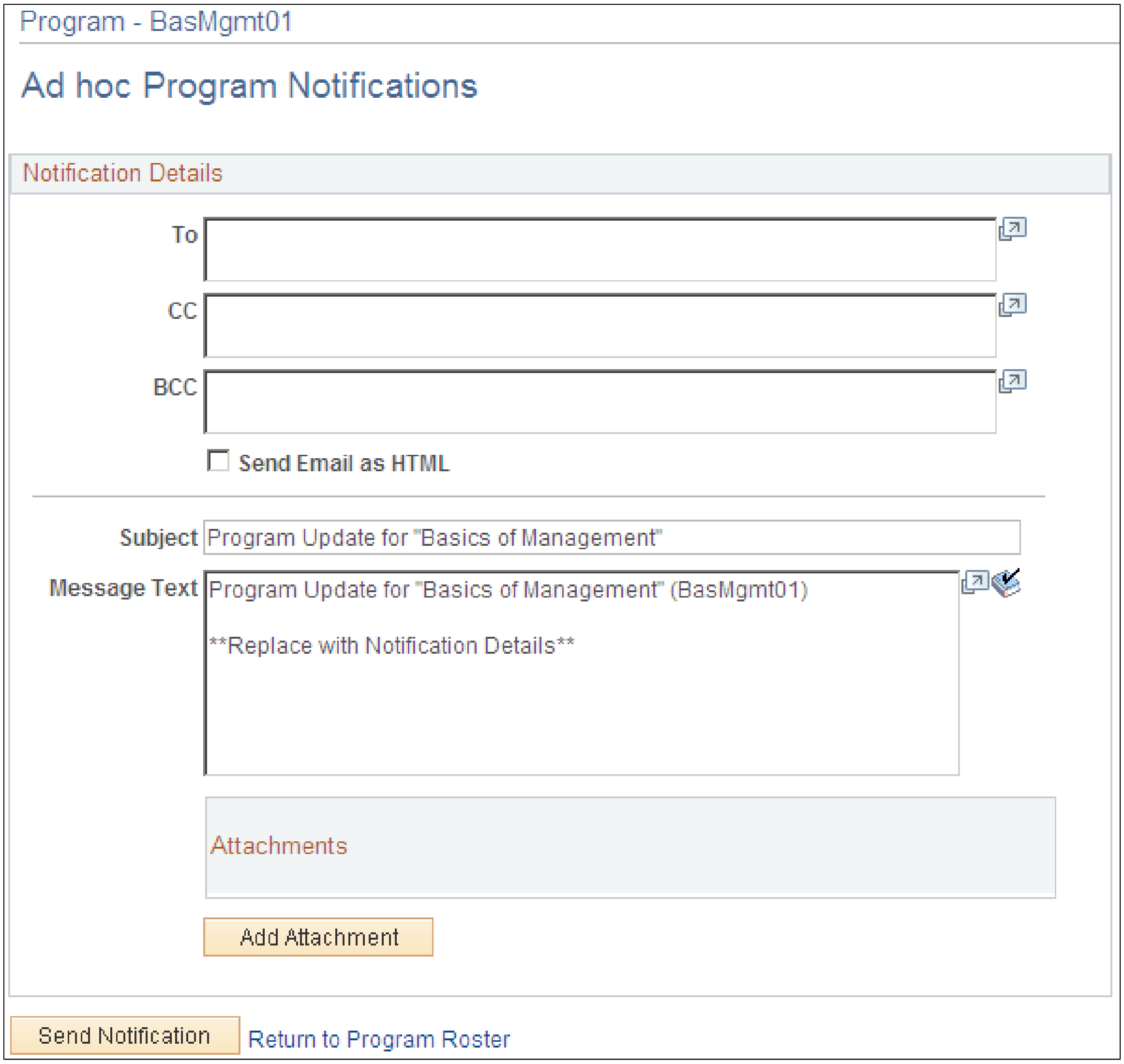
Use the Ad hoc Program Notifications page (LM_PRG_NOTIF) to send email messages about the program to learners and other interested parties.

Navigation:

Enterprise Learning > **Learner Tasks** > **Administer Program Rosters**

Search for the program and click the Roster button. Select the learners to notify. In the Group Action field, select *Send Notification* and click Go.

This example illustrates the fields and controls on the Ad hoc Program Notifications page.



Field or Control	***Description***
To, **CC**, and **BCC**	The **To** field displays the learner email addresses for the learners you selected on the roster. You can also manually add email addresses. Use the **CC** and **BCC** fields as required.
Send Email as HTML	Select this check box to have the message displayed in rich text HTML if you are using HTML tags as you compose your message.

Field or Control	***Description***
Subject and **Message Text**	The system automatically displays default entries that include the program code and description. You can edit and spell check these as required. You can also use standard HTML tags to format the text of your message.
Add Attachment	Click to attach a file to the ad hoc notification email. The Attachments group box displays the files you add as attachments.
Send Notification	Click when you are ready to send this program notification. The system displays a confirmation page where you can click **OK** to send the message or click **Cancel.** If you click **OK,** the system queues your message and returns you to the Ad Hoc Program Notifications page.

Program Notifications Page

Use the Program Notifications page (RCTL_CURR_NOTIF) to run the program notification processes to send learners reminders and warnings about their certification status.

Navigation:

Enterprise Learning > **Notifications** > **Program Notifications**

To process program notification emails:

1. Add a new run control ID or search for and select an existing one.
2. Enter the As of Date for which you want to run the processes.

   When scheduling the job to run on a nightly basis, make sure this field is blank. In this case, the system uses the current date every time it runs. For non-recurring instances, this field gives you the ability to process program notifications in a back-dated environment. For example, if you did not run the process over the weekend, you can run the process twice—once for each date missed. When backdating a run, you must specify the exact date missed. If you leave this field blank, the system will use the current date.
3. Click Run.

   The system displays the Process Scheduler Request page.
4. In the Process List grid, select the process that you want to execute, and then click **OK.**

   It is recommended that you schedule all the processes to run once every night.

   The overview for this topic provides descriptions for each of the processes.

   See Understanding Program Notifications.

Setting the Top of Stack Indicator for Program Registrations

Page Used to Set the Top of Stack Indicator for Program Registrations

Page Name	***Definition Name***	***Usage***
Program Top of Stack Updates Page	LM_PRGTOS_RUNCTL	Run the process that sets the Top of Stack flag for all of your existing program registrations.

Understanding the Top of Stack Indicator

When you select the Program Auto-Enrollment Option option on the Install Defaults – Programs Page, program registrations trigger the system to automatically enroll learners in the courses associated with the program. To facilitate this automatic enrollment, the automatic enrollment process starts with the program registration that is designated as the top of stack. This system sets the Top of Stack indicator for one registration row per program per learner based on the following rules:

1. If a learner has only one registration row and it does not have a status of *CANC* (dropped), then the system sets the Top of Stack flag for the registration row.
2. If there are multiple registration rows and only one of them is non-terminal, then the system sets the Top of Stack indicator for the non-terminal registration row.
3. If there are multiple non-terminal registration rows, the system sets the Top of Stack flag for the non-terminal registration row that has the maximum enrollment date (PS_LM_PRG_REG. LM_ENRL_DT) for the learner and program combination.

   Note: If there are multiple non-terminal registration rows and more than one have the same maximum enrollment date, then the system sets the Top of Stack flag for the registration row with the maximum program registration ID.

4. If there are multiple registration rows, all of which are terminal, the system sets the Top of Flag stack for the terminal registration row for the learner and program combination with the latest (most recent) enrollment date **and** the highest registration ID with the program status not equal to *CANC*.
5. Any time a new registration row is added or an existing row is reissued, the system flags it as the top of stack and clears the flag for the previous top of stack registration row.
6. If the current top of stack registration row is cancelled or dropped, the system re-evaluates the top of stack flag for that learner and program and sets the Top of Stack flag for the appropriate non-cancelled registration row.

Use the Program Top of Stack Updates page to run the one-time process that sets the Top of Stack flag for all of your existing program registrations.

Program Top of Stack Updates Page

Use the Program Top of Stack Updates page (LM_PRGTOS_RUNCTL) to run the process that sets the Top of Stack flag for all of your existing program registrations.

Navigation:

Enterprise Learning > **Program Top of Stack Updates**

Click the Run button to initiate the Top of Stack (LM_PRG_TOS) Application Engine process.

Chapter 24

Searching in ELM

Understanding PeopleSoft Search Framework Implementation for ELM

The PeopleSoft Search Framework provides a standard, declarative method for creating, deploying, and maintaining search indexes for all PeopleSoft applications. PeopleSoft Search, which is comprised of Global Search and Keyword Search Page search, is a PeopleTools indexed search technology that relies on the integrated search engine by way of Integration Broker. It creates and updates indexes in the search engine, and requires the use of PeopleSoft Query or Connected Query to create search definitions that identify the objects and attributes to make available to the indexes. Integration Broker provides the interface between PeopleSoft Search Framework and the search engine to deploy the search definitions, build the indexes, and return the search results.

This video demonstrates using search in PeopleSoft:

Using Search in PeopleSoft Applications

PeopleSoft Search Framework supports both *Global Search* and component *Keyword Search Page* search features. The Global Search feature, initiated from a global search bar in the application header, provides a drop-down list for selecting a specific search category against which to run a search. The Keyword Search Page feature allows keyword-based searches from a *Keyword Search* page that appears within an administrative component. Both searches target the PeopleSoft pages and components as if you navigated directly to them while providing flexibility in searching. Data is secured so that search results return only data rows to which the user has role and permission list access. Users can choose to display the search results in list or grid format.

PeopleSoft Search Framework provides a consistent technology by which to deploy and maintain search indexes regardless of PeopleSoft application. However, each application provides and maintains its own application-specific search definitions. The Understanding PeopleSoft Search Definitions for ELM topic lists the search definitions that Oracle delivers preconfigured for PeopleSoft ELM.

PeopleSoft Search Framework References

Refer to the Elasticsearch Home Page (Doc ID 2205540.2) for the latest information, announcements, and videos about the PeopleSoft Search Framework and Elasticsearch.

For more information about the overview, setup, deployment, and administration of the PeopleSoft Search Framework, see *PeopleTools: PeopleSoft Search Technology* product documentation.

For information about setting up PeopleSoft Search features for ELM, see the *Configuring Global Search* task in the installation document for PeopleSoft Enterprise Learning Management 9.2, which is available in the PeopleSoft Documentation Portal.

Understanding PeopleSoft Search Definitions for ELM

Each PeopleSoft application provides predefined application-specific search definitions for implementation within the PeopleSoft Search Framework. Tables later in this documentation provide a list of the search definitions that Oracle delivers preconfigured for PeopleSoft ELM.

You can use PeopleSoft ELM global search definitions and search page (component) definitions as delivered, copy and modify them, or create new ones.

Note: For easier maintenance and patch upgrades, Oracle recommends that you preserve the preconfigured application-specific search definitions as default definitions. To modify a delivered search definition, manually copy it and then modify the copy.

For information about the building blocks or objects that are associated with a search definition (query types, delete query, security type, attributes, facets, search category, and so on), and to learn how to create and implement search definitions using PeopleSoft Search Framework, you must read *PeopleTools: Search Technology*.

To view the preconfigured ELM search definitions that are listed in this topic, access the Search Definition component **(PeopleTools > Search Framework > Designer > Search Definition).**

PeopleSoft Search Considerations for ELM

When implementing PeopleSoft Search Framework for ELM, keep these general considerations in mind.

PeopleSoft ELM searches:

- Are enabled for Global Search.

  Note: There are no component level Keyword Search Page searches preconfigured for ELM at this time.

- Do not include preconfigured component level Keyword Search Page searches for ELM at this time.
- Consider only current effective-dated rows. Incremental indexing should be run daily to index changed data into the search engine system and return most recent information. Consider the rate at which your data changes to determine the frequency for incremental indexing. For example, the Time and Absence indexes may need to be incrementally indexed multiple times in a day, whereas Succession Planning might only need to be incrementally indexed once in a quarter.
- Are based solely on the fields and values that are indexed.
- Rely on the last updated date/time stamp field for incremental search indexing. (If a date/time stamp field is not present in the underlying tables of a search definition, then changes to that table will not be tracked. Date and numeric fields cannot be added as facets.)
- Allow non case-sensitive free text search.
- Accept a list of special characters in keyword search. Refer to the *Working with Search Operators in PeopleSoft Search* topic in *PeopleTools: Search Technology* for more information.

In addition to these general considerations, each PeopleSoft ELM search definition may have its own, more specific set of considerations.

Understanding PeopleSoft Insights Using PeopleSoft Search Framework

This topic provides an overview about PeopleSoft Insights and discusses:

- Understanding PeopleSoft Insights
- Search Definitions and Privileges
- Deploying PeopleSoft Insights Dashboards

Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

Dashboard administrators use PeopleSoft Insights and the underlying analytics engine to create both dashboards and visualizations, which are then attached to dashboards. The dashboard can contain multiple visualizations. The visualization and dashboard are objects in PeopleSoft Insights, which must be imported into the PeopleSoft application.

Typically, a PeopleSoft user who has the Search Administrator role performs these tasks:

- Imports dashboards.
- Configures dashboards as tiles or related information.
- Specifies user privileges for the dashboard.

  End users access dashboards based on user privileges.
- Deploys dashboards.

Note: Oracle recommends that you do not modify or edit a delivered dashboard or visualization. You may copy a delivered visualization and then modify it as per your business requirements.

For more information, see *PeopleTools: Search Technology*, "Working with Insights Dashboards for PeopleSoft Application Data," Understanding Application Data and Insights Dashboards.

Search Definitions and Privileges

This table lists the PeopleSoft search definitions defined for ELM Application Dashboards, which are delivered with a PeopleSoft image. Use the appropriate search definition to build your indexes. Keep in mind that search definitions must be deployed before you can build the index.

PeopleSoft roles are created to grant view or edit access for PeopleSoft Insights dashboards. A permission list is not necessary to access these dashboards. Refer to the table below to see roles associated to each search definition. For more information about assigning privileges, see the "Specifying User Privileges" subtopic within the *PeopleTools Search Technology:* “Working with Insights Dashboards for PeopleSoft Application Data”, Creating a Visualization for Application Data documentation.

Note: Search definitions are used for component keyword search and insights.

Tile Name	***Insights Dashboard Name***	***Search Definition***	***Role(s)***
Certifications by Manager Tile	Certifications by Manager	LM_PRG_RGSTNS	Learning Manager Fluid
Learning by Manager Tile	Learning by Manager	LM_ACT_ENRLMNTS	Learning Manager Fluid
Team Certification Insights Tile	Team Certification Insights	LM_DR_RGSTNS	Learning Manager Fluid
Team Learning Insights Tile	Team Learning Insights	LM_DR_LEARNING	Learning Manager Fluid

Deploying PeopleSoft Insights Dashboards

Use the Deploy Insights Dashboards page to deploy Insights dashboards and tiles. For more information about the Deploy Insights Dashboards page, see *PeopleTools Search Technology:* “Working with Insights Dashboards for PeopleSoft Application Data”, Managing a Delivered Dashboard.

Note: Before you deploy a dashboard, you must ensure that the prerequisites of installing and setting up PeopleTools, OpenSearch, and Insights are completed. Also you must ensure that the required search definitions are deployed and indexed successfully because a visualization in Insights is based on the indexes in OpenSearch.

For more information on building indexes, see the *PeopleTools Search Technology:* "Administering PeopleSoft Search Framework," Working with Search Indexes.

Understanding Real Time Indexing in ELM

Real Time Indexing (RTI) uses DirectTransfer methods to transmit search indexing data directly from PeopleSoft batch servers to Elasticsearch. It is performed in near real-time by indexing the data as soon as it is saved.

For additional information about DirectTransfer, see PeopleSoft PeopleTools, *Search Technology*, "Administering PeopleSoft Search Framework and Using Direct Transfer".

Search Definition for Real Time Indexing

PeopleSoft delivers search definitions that you can implement for RTI.

RTI can be used on these Search Definitions as long as the minimum tools release is in effect.

Warning! Oracle recommends that you do not implement RTI for any other search definition in the PeopleSoft application at this time. The PeopleSoft system does not support RTI for any other search definition other than those listed in this table.

Search Definition	***Minimum PeopleTools Release***	***ELM Update Image***
LM_ACT_ENRLMNTS	8.59.13	N/A
LM_DR_LEARNING	8.59.13	N/A
LM_DR_RGSTNS	8.59.13	N/A
LM_PRG_RGSTNS	8.59.13	N/A
LS_LM_ACT_CI_FL	8.59.13	Image 23
LS_LM_OBJV	8.59.13	N/A
LS_LM_PRG_FL	8.59.13	Image 23

Steps to Build Real Time Indexes

To build Real Time Indexes:

1. Perform a full index build of the indexes that you will use.

   This allows a baseline index for RTI to add records.

2. Enable RTI on the search definition using the Configure Real Time Indexing page (**PeopleTools** > **Search Framework** > **Real Time Indexing** > **Configure Real Time Indexing**).

   a. Enter the search definition (from the list above) in the filter box.

   b. Select the **Enable** check box and save.

3. Download the trigger sql for your database environment using the Trigger SQL link.

   MSS, DB2 z/OS, and Oracle are supported.

   Note: When you click the link, trigger SQL is generated for each supported database platform. Based on the browser you use, you may receive a prompt to Save the file or Cancel. Click Cancel if the prompt is for a Database platform that is different from what you use, and the next database platform's SQL is generated.

4. Provide the trigger to your database administrator to apply to the database.

For additional information about configuring Real Time Indexing, see PeopleTools, Development Tools, *Search Technology*, "Administering PeopleSoft Search Framework", Using Real Time Indexing.

Using Global Search Definitions for ELM

The table in this topic lists and describes the Global Search definitions that Oracle delivers preconfigured for PeopleSoft ELM. If considerations exist other than those listed in the PeopleSoft Search Considerations for ELM topic, they are listed in the Additional Considerations column of the table.

With Global Search enabled, the global search bar appears in the header of the application where users can either enter keywords on which to search globally across the application or use the drop-down list for selecting a specific search category on which to search.

PeopleSoft ELM Global Search Definitions

Learning Global Search uses two search groups, Learning (LS_LM_LEARNING) and Learning Fluid (LS_LM_LEARNING_FL), each of which consists of search definitions for courses and programs. This global search redirects to the Find Learning Component.

This table lists and describes the PeopleSoft ELM global search definitions that Oracle delivers preconfigured for use within PeopleSoft Search Framework.

Search Definition Name	***Target Component and Navigation***	***Usage***	***Additional Considerations***
Courses (LS_LM_ACT_CI) Programs (LS_LM_PRG)	Find Learning (LM_FIND_ LEARNING) Any User: Find Learning Course = LM_LEARNING_ ITEMS; Program = LM_PRG _DTLS_ESS • **(Fluid Manager Self Service Home page)** > **Team Learning** Select **Find Learning** from navigation collection. • **Self Service** > **Learning** > **Find Learning**	Users can enter keywords to search for and enroll in courses and programs. Users can also filter the search for courses based on location and course type or category. *Keyword Examples:* • Enter course keywords *(PeopleSoft, Java, Management)* • Enter a category of *Communication* • *%* (search for all)	• This search includes two search definitions grouped into one search category, one for Courses and one for Programs. • To use Global Search across PeopleSoft ELM and HCM databases, single signon must be configured between the two databases. See Configuring PeopleSoft HCM and ELM for Learning Search.

Search Definition Name	*Target Component and Navigation*	*Usage*	*Additional Considerations*
		Note: When *All* search is selected, Learning search (Course = LM_LEARNING_ITEMS) results are displayed in standard format instead of redirecting to Find Learning. These search results are filtered based on the security defined for the learner groups to which the user belongs. If, however, the user has an assigned role with permission lists LMLELM3700 (Maintain Rosters) or LMLELM3800 (Administer Enrollments), the search results are not filtered and the user can see all learning items that match the search. Currently, the delivered roles LMLELM_Learning_Admin (Learning Administrator) and LMLELM_Roster_Administrator (Roster Administrator) are associated with these permission lists and have access to all learning items.	
Courses Fluid (LS_LM_ACT_CI_FL) Programs Fluid (LS_LM_PRG_FL)	Find Learning (LM_FND_LRN_FL) **(Fluid Employee Self Service Home page) > Learning > Find Learning**	This is the fluid version of Courses and Programs searches.	

Understanding Delivered Visualizations in ELM

This topic provides the delivered dashboard visualizations in ELM.

Visualizations	***Dashboard***	***Search Definition***	***Image Added***
Expiring Certifications count Certifications Expired count Active Certifications count Certifications in Progress count Recertifications in Progress count	Certifications by Manager	LM_PRG_RGSTNS	Image 23
Mandatory Learning • Mandatory Learning by Manager • Mandatory Learning by Course • Metric count • Mandatory Learning • Pending Mandatory Learning All Learning • Metric counts • All Learning Most Enrolled Courses Dropped Learning Visualizations • Metric count • Dropped Learning Reasons Enrollments Trend	Learning by Manager	LM_ACT_ENRLMNTS	Image 23

Visualizations	*Dashboard*	*Search Definition*	*Image Added*
Expiring Certifications count Certifications Expired count Active Certifications count Certifications in Progress count Recertifications in Progress count	Team Certification Insights	LM_DR_RGSTNS	Image 23
Mandatory Learning • Metric count • Mandatory Learning • Pending Mandatory Learning • Mandatory Learning by Learner • Mandatory Learning by Course All Learning • Metric counts • All Learning Enrollment Trend	Team Learning Insights	LM_DR_LEARNING	Image 23

Configuring PeopleSoft HCM and ELM for Learning Search

Learning Global Search can be enabled from the HCM database through Integration Broker. The search artifacts reside in, and must be indexed in, the ELM database. For the Learning search to work from the HCM database, you must perform several configuration steps. This topic provides an overview of those steps.

Steps for Configuring HCM and ELM Databases for Learning Search

With Integration Broker configured to allow the PeopleSoft HCM and ELM databases to communicate, follow these steps to further configure the databases for the Learning remote global search.

1. Add the Integration Administration role to the administrative user in both the ELM and HCM databases.

2. Add the ELM default local node as the network node in the HCM database, and the HCM default local node as the network node in the ELM database **(PeopleTools > Integration Broker > Integration Network > Network Setup).**
3. Set up the Portal Nodes (HRMS and ELM), Portal URI, and Content URI in the both of the databases **(PeopleTools > Integration Broker > Integration Setup > Nodes).**
4. Add the Search- Learning role to all users in ELM who will use the Learning global search.
5. Import the Learning remote search group from ELM into the HCM database **(PeopleTools > Search Framework > Administration > Remote Search Groups).**

   To import, enter the ELM default local node *PSFT_LM* in the **Content Provider** field on the Remote Search Groups page, and select **Import.** Then, on the Import Search Groups page, select the *LS_LM_LEARNING_<ELM Database Name>.* as the**Search Category Name.**

   For more information, see *PeopleTools: PeopleSoft Search Technology,* “Administering PeopleSoft Search Framework,” Importing Remote Search Groups.
6. Add the imported search group to the home page search context **(PeopleTools > Search Framework > Administration > Define Search Contexts).**
7. Add the HCM and ELM default local nodes to the Single Signon page in the HCM database and in the ELM database **(PeopleTools > Security > Security Objects > Single Signon).**

Understanding the Learning Catalog

The learning catalog is a repository of detailed information about all classes and programs that are available to your organization's employees, partners, and customers. You can use the Find Learning (LM_FIND_LEARNING) component to search the catalog for relevant classes and programs:

The categories, classes, and programs that learners can view depend on the learner groups to which the user belongs. These groups are defined as part of the system setup. For example, a user who belongs to a learner group called Sales might be able to view all classes related to sales, but not access information for engineering classes.

Users can select items from the catalog to add to their personal learning plans; they can also initiate the enrollment process directly from the catalog. If users are unable to locate classes or programs that meet a particular need, they can submit a learning request from the catalog. Learning requests help administrators assess the demand for new offerings and notify learners as offerings become available.

Using the Learning Catalog

Pages Used to Search the Learning Catalog

Page Name	***Definition Name***	***Usage***
Find Learning Page	LM_FND_LRN_PG	Search for classes, courses, and programs; add items to learning plans; enroll and register in classes and programs; submit learning requests; and launch web-based training.
Request Learning Page	LM_SS_LRN_REQ	Request a new class for an existing course or request a new course not found in the catalog.
Review Details Page	HCSC_RTG_ALL_SEC	View ratings and reviews for a learning item.
Course Details Page	LM_SS_ITM_DTL	Review details and class options for the course.
Course Details Modal Page	LM_LEARN_ACT_DTL	Review details of the class, including the class syllabus and schedule, class components, related objectives, and notes and attachments.
Team Members Page	LM_TEAM_LEARNER	Select team members for learning enrollment.
Review Information Page	• LM_REV_ENRLMT_SS • LM_REVIEW_REG_SS	Review class or program information, and enroll in a class or register for a program.
Enroll In Class Page	LM_REV_ENRLMT_TEAM	Review class information before submitting enrollment for team members.
Register For <Program> Page	LM_REVIEW_GRP_REG	Review program information before submitting registration for team members.
Enroll Learners - Review Enrollment Page	LM_REV_MULTI_TEAM	Review learning item information before submitting enrollment for multiple learning items.

Page Name	***Definition Name***	***Usage***
Class Details Page	LM_SS_ACT_DTL	Review details of the class, including the class syllabus and schedule, class components, related objectives, and notes and attachments.
Recommend Learning Page	LM_RECOMMEND_LRNG	Send a recommendation notification to another ELM user for a class, course, or program.
Program Details Page	LM_PRG_SUMM_PG_SS	View detailed information about the program including the completion rules, objectives, prerequisites, and notes and attachments.
Associated Programs Page	LM_ITM_PRG_SEC	Select the associated programs to be automatically registered when you submit your class enrollment.
Review Information (Confirmation) Page	LM_CONF_ENRLMT_SS	View a confirmation of your class enrollment.
Registration Confirmation Page	LM_CONF_REG_SS	View a confirmation of your program registration.
Enroll In Class (Confirmation) Page	LM_CONF_ENRLT_TEAM	View a confirmation of team member class enrollment.
Register For <Program> (Confirmation) Page	LM_CONF_GRP_REG	View a confirmation of team member program registration.
Enroll Learners - Review Enrollment (Confirmation) Page	LM_CONF_MULTI_TEAM	View a confirmation of team member enrollment or registration in multiple learning items.

Understanding Catalog Search

Users can use the Find Learning (LM_FIND_LEARNING) component to search the catalog for classes, courses, and programs that meet their selection criteria. By selecting a class or program, users can see a detailed description.

Enterprise Learning Management provides two options for searching the catalog:

- Basic search, for searching by keywords.
- Advanced search, for filtering classes and programs using multiple selection criteria.

For basic searches, users can search by keyword using the Search by Keyword field. For advanced searches, they can search on a number of different criteria. When a user performs an advanced search, the system looks for learning that meets all of the selection criteria.

Users can select one of the two search options as their default search option on the Learner Preferences Page.

Related Links

Updating the Catalog Indexes

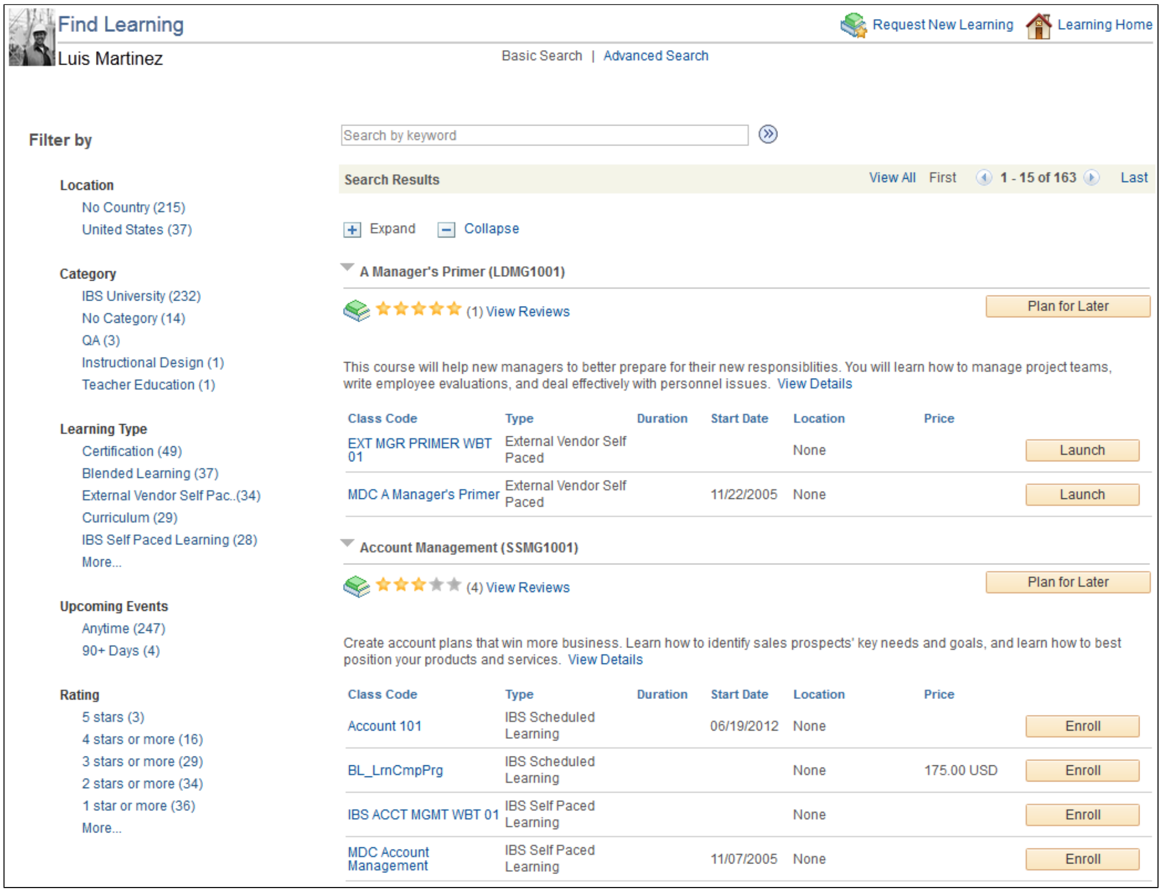
Find Learning Page

Use the Find Learning page (LM_FND_LRN_PG) to search for classes, courses, and programs; add items to learning plans; enroll and register in classes and programs; submit learning requests; and launch web-based training.

Navigation:

- Click the **Find Learning** or **Find Team Learning** quick links from the Learning Home.
- Enter a Keyword Search in the Search for Learning pagelet of the Learning Home.
- Click the **Advanced Search** link in the Search for Learning pagelet of the Learning Home.
- **Self Service** > **Learning** > **Find Learning**
- **Manager Self Service** > **Team Learning** > **Find Learning**

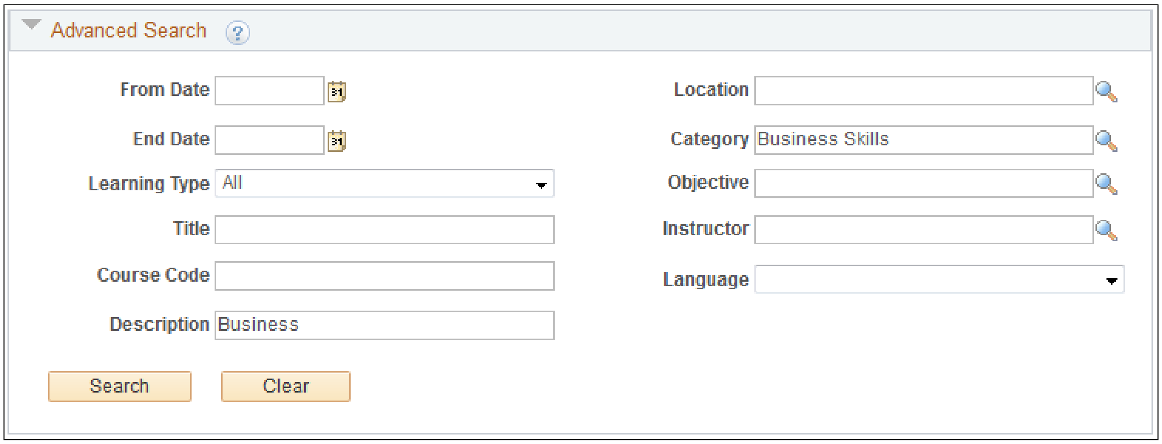
This example illustrates the fields and controls on the Find Learning page.



When you enter the search criteria and click the **Search** button, the system displays the learning that meets the selection criteria. The number of results displayed is limited by the number entered in the **Maximum Rows Returned for Search** field on the Install Defaults page. If your search finds more results than the number displayed, you will receive a message suggesting that you refine your search using the advanced search functionality.

Field or Control	***Description***
Request New Learning	Click to access the Request Learning Page where you can enter requests for new learning.
Basic Search	Click to find learning using a basic keyword search.
Search by keyword	Enter keywords to use for your basic search. The system obtains basic search results by matching the keywords that you enter with the Course or Program Title, Course and Program Description, Course and Program Code, Learning Type, Class Code, Location State Code, Location Name, and Keywords defined for learning.
Advanced Search	Click to find learning using advanced search criteria.

This example illustrates the Advanced Search view for the Find Learning page.



Field or Control	***Description***
From Date and **End Date**	Enter a date range in these fields to search for learning taking place within a specific time frame.
Location	Enter a value to find learning being offered at a specific location. Advanced search returns all learning that has one or more schedules sessions at the location you enter.
Category	Enter a value to find learning within a specific category. Categories make finding learning easier by breaking learning up into logical units.
Type	Select a value to find learning of a specific type.
Objective	Enter a value to find learning associated with a specific objective. You achieve objectives when you successfully complete learning items. Objectives can be skills, competencies, or other learning goals that might be associated with different learning.
Title	Enter a value to find learning by title.
Instructor	Enter a value to find learning taught by a specific instructor.
Course Code	Enter a value to find learning with a specific course code.

Field or Control	Description
Language	Enter a value to find classes taught in a specific language. **Note:** If you search using this field, your search results will include only classes because you do not specify a language for programs.
Description	Enter a value to find learning by description.
Search	Click to find learning that matches the entered search criteria.
Clear	Click to clear all of the search criteria fields.

Search Results

When you click the **Search** button, this section of the page displays all of the courses and programs that meet your search parameters. For courses that meet your search parameters, the system displays all classes that do not have a status of *Enrollment Closed*. For more information on how the system determines class enrollment eligibility see the documentation for the Maintain Classes - Class Details Page.

Note: The number of search results listed represents the number of courses and programs that meet your search criteria, not the number of classes.

Field or Control	Description
Expand and **Collapse**	Click to expand or collapse the courses and programs that appear in your search results.
View Reviews	Click to access the Review Details Page where you can view review and rating information for a course.
Plan for Later	Click to access the Select Learning Plans Page where you can add the course to one of your learning plans. **Note:** If you access this page from the Manager Self Service menu, clicking this button access the Team Members page. **Note:** Adding a course to your learning plan does not enroll you in the course.
Class Code	Click a link in this column to access the Course Details Page where you can view detailed information about the class.

Field or Control	*Description*
Start Date	The system displays a value in this column only for classes with the **Display Start and End Date** check box selected on the Class Details Page. For any classes that have at least one associated session, the system displays the Start Date as a link that you can click to access a modal page with detailed session information.
Location	Displays the location of the class if you have defined at least one session for the class and selected the Display Facility to Learner check box on the Session Details Page. Click the link in this column to view detailed information about the location in which the class is being taught. For classes with multiple sessions at different locations, the system displays a link with the label *Multiple* in this column. You can clink this link to access location information for the different sessions. **Note:** For classes without a defined location, the system displays a value of *None* in this column.
Enroll	Click to access the Review Information Page where you can submit your enrollment. **Note:** If you access this page from the Manager Self Service menu, clicking this button access the Team Members page.
Launch	Click to launch a class and enroll in it simultaneously. The **Launch** button appears for a class instead of the **Enroll** button if the following criteria are met: 1. The delivery method type associated with the class has the **Enable One-Step Launch and Enroll** check box selected on the Delivery Method Type Page. 2. The class does not require approvals. 3. The first learning component associated with the class is launchable.

Field or Control	*Description*
View Details	Click to access the Course Details Page or Program Details Page where you can view detailed information about the course or program. **Note:** Unlike the Find Learning page, the Course Details page displays all active classes, including those with a status of *Enrollment Closed.*
Register	Click to access the Review Information Page where you can submit your registration. **Note:** If you access this page from the Manager Self Service menu, clicking this button access the Team Members page.

Filter By

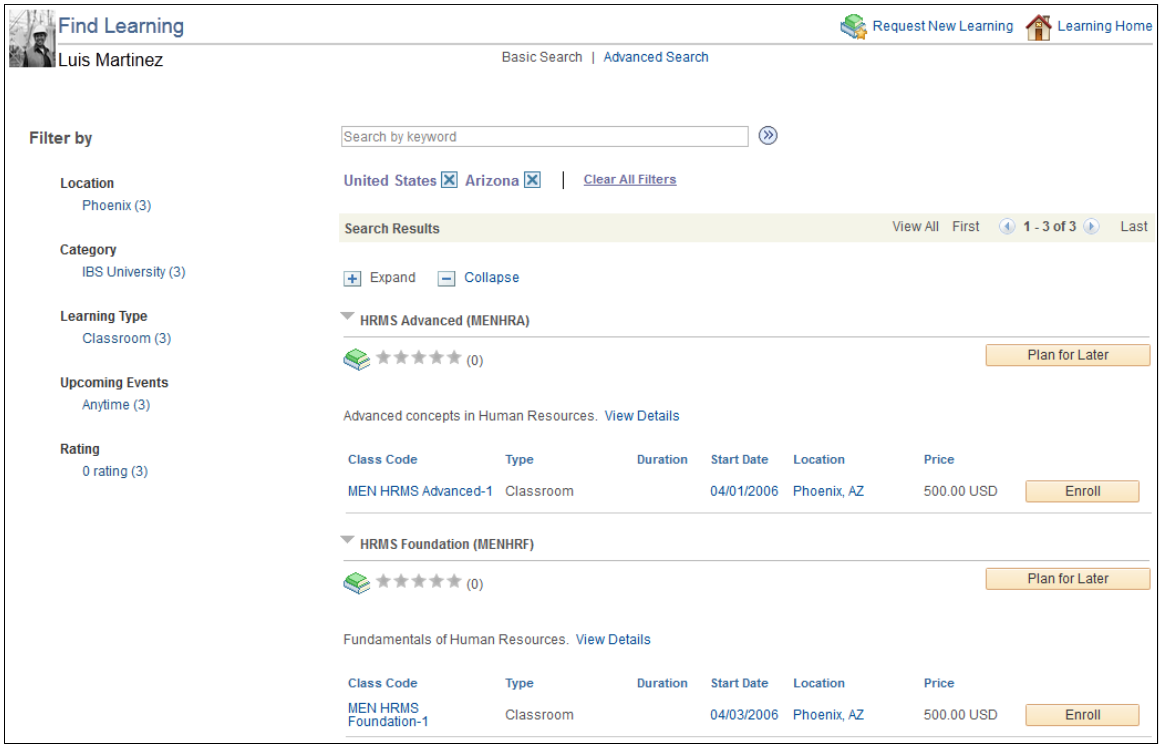
This section of the page enables you to quickly filter your search results by location, category, learning type, upcoming events, and rating. When you click a facet link, the system displays only the classes associated with the link that you select.

Some facet links are hierarchical, meaning that once you select one, additional links become available that enable you to filter the search results further. For example, if you select the United States Location facet link, you can then select Location facet links for individual states. Other facet links are not hierarchical and do not make additional, more specific facet links available when you click them. For example, if you select the Curriculum Learning Type facet link, there are no additional Learning Type facet links available to select.

Note: The numbers next to each facet link represent the number of classes or programs that are included in the facet. If a course has no classes, however, then it is counted toward the facet number as if it were one class.

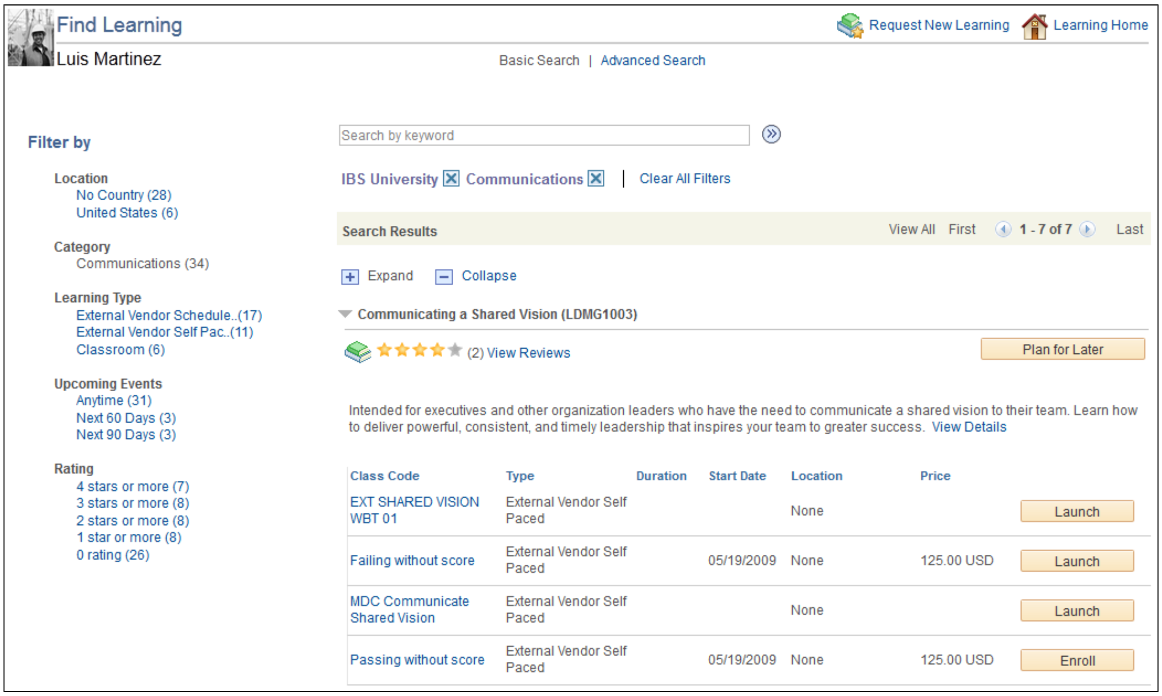
Field or Control	*Description*
Location	Use this facet to filter search results by locations such as countries, states, or cities. The system includes web-based training and self-paced learning with no defined location under the **No Country** facet.

This example illustrates filtering search results using the Location facet. In this example, the user first selected the United States facet link and then drilled down further by selecting the Arizona facet link.



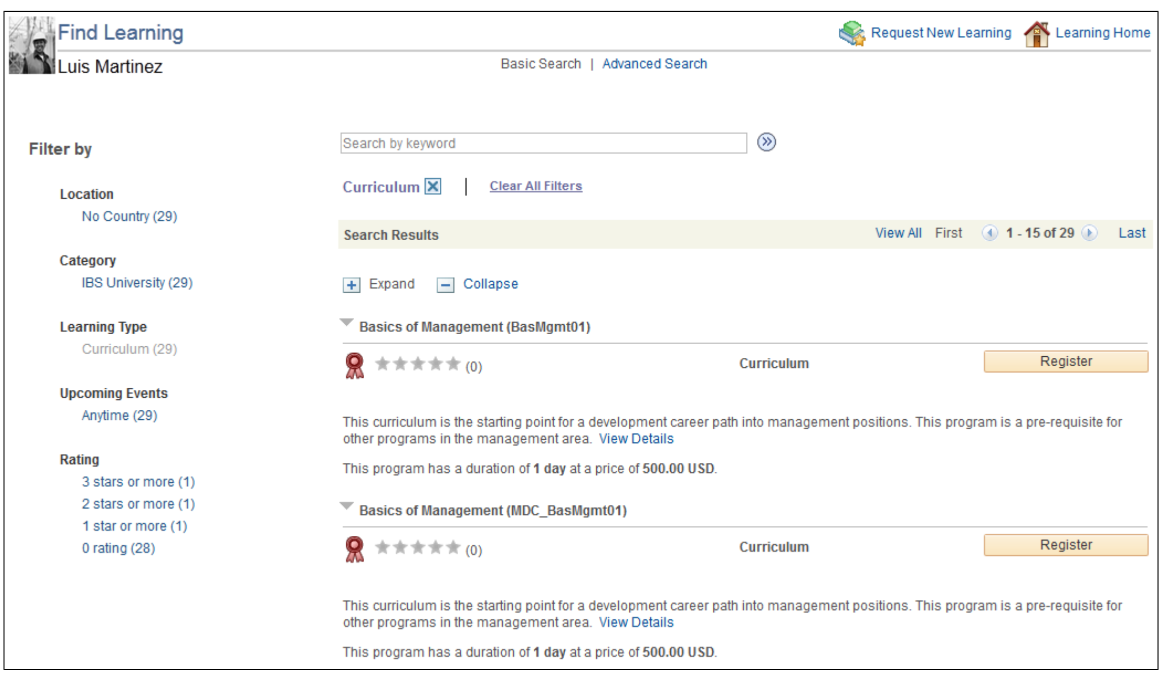
Field or Control	***Description***
Category	Use this facet to filter search results by the categories assigned to courses. For more information on categories, see Defining Learning Categories.

This example illustrates filtering search results using the Category facet. In this example, the user first selected the IBS University facet link and then drilled down further by selecting the Communications facet link.



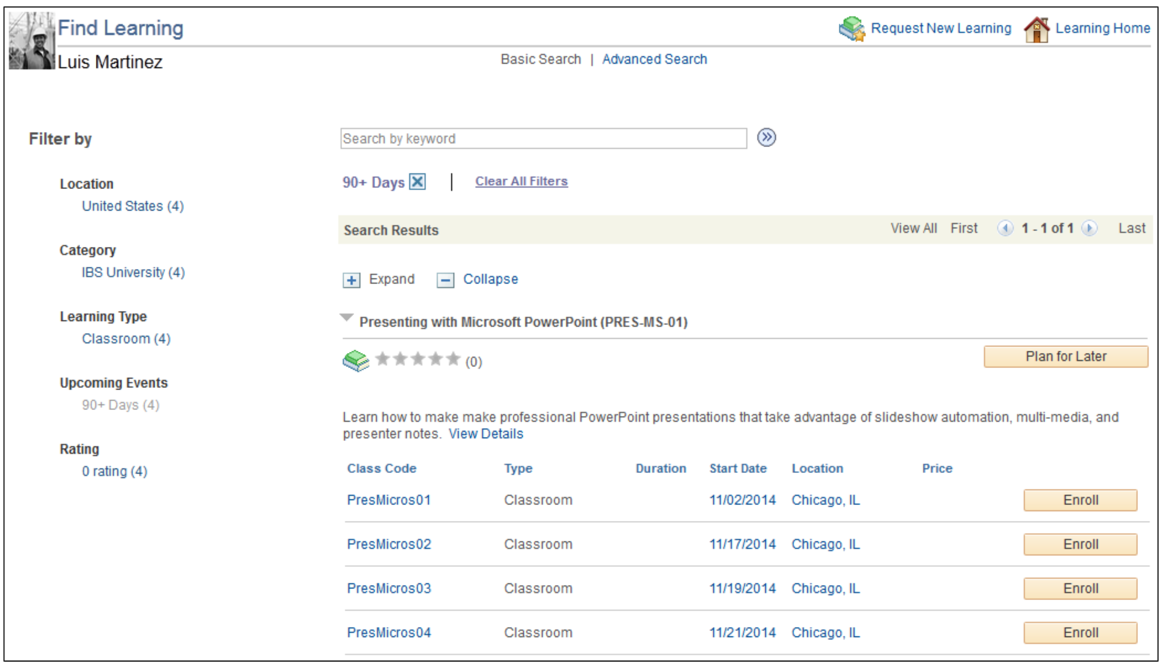
Field or Control	***Description***
Learning Type	Use this facet to filter by learning type such as curriculum, classroom, or certification.

This example illustrates filtering search results using the Curriculum Learning Type facet link.

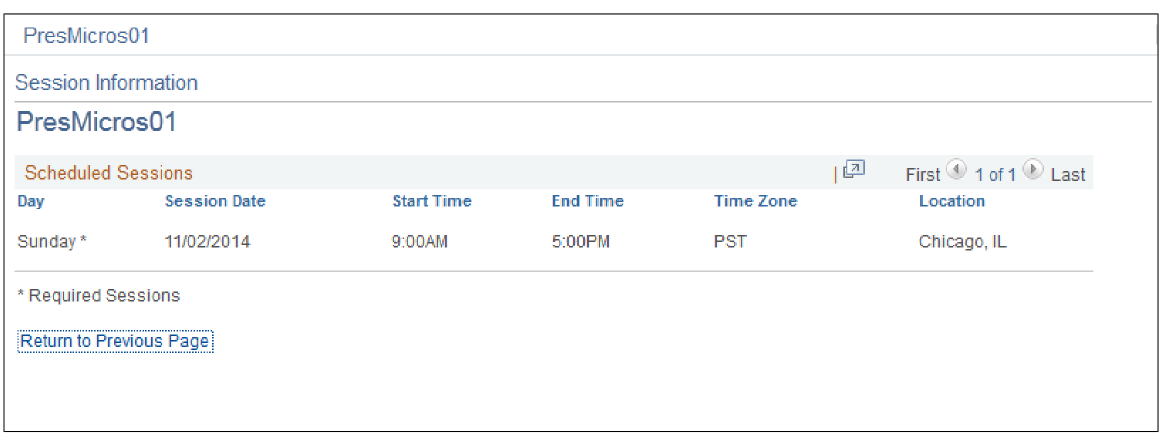


Field or Control	*Description*
Upcoming Events	Use this facet to filter your search results based on when learning is scheduled to be offered. The system includes classes with no defined patterns or sessions under the **Anytime** facet. **Note:** The system uses the date of the first upcoming scheduled session for a class to determine which facet it should fall under. This date may be different from the **Start Date** defined for a class. To view the scheduled session dates for a class, click the **Start Date** link in the search results.

This example illustrates filtering search results using the 90+ Days Upcoming Events facet link.

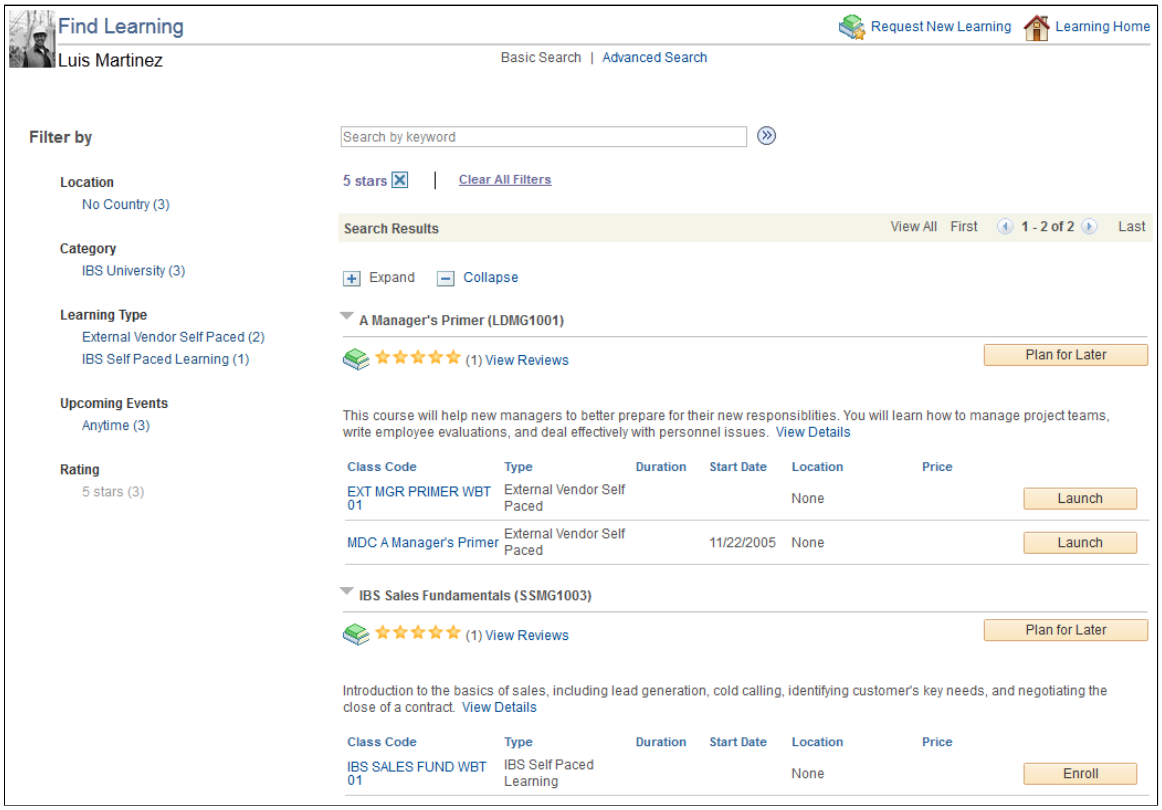


This is an example of the Session Information page you can access by clicking a Start Date link for a class on the Find Learning page.



Field or Control	*Description*
Rating	Use this facet to filter search results by the average rating for courses and programs. Individual classes may have a higher or lower rating than the average rating of the course to which they are associated.

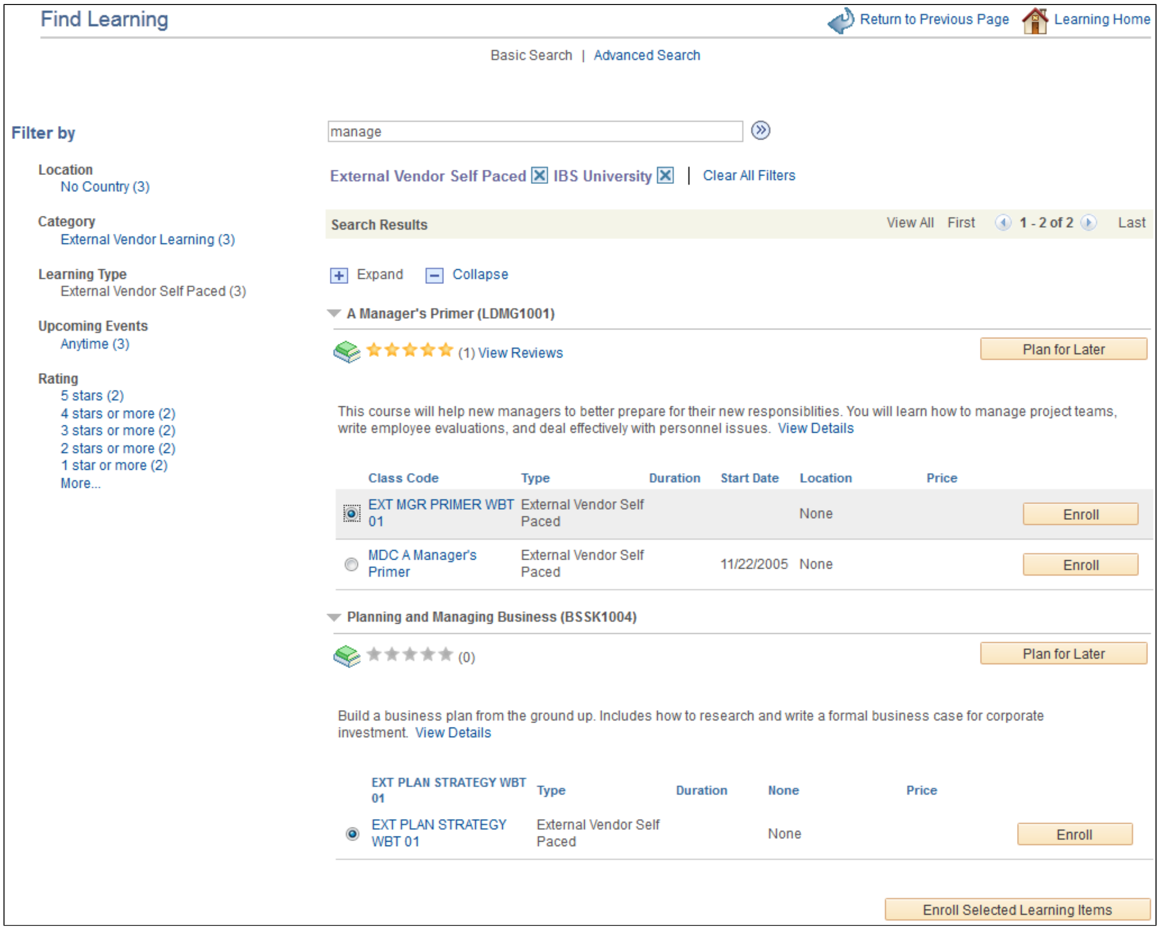
This example illustrates filtering search results using the 5 stars Rating facet link.



Multiple Learning Object Enrollment

When managers access the Find Learning page (**Manager Self Service** > **Team Learning** > **Find Learning**), and the Allow Enrollment in Multiple Learning Objects check box is selected on the Install Defaults - General page, they can enroll one or more team members in multiple learning items in one process. Managers can select multiple classes, multiple programs, or a combination of multiple classes and programs.

This is an example of what the Find Learning page looks like when accessed by a manager with enrollment in multiple learning objects enabled.



Field or Control	*Description*
Enroll Selected Learning Items	Once you have selected the learning items in which you want to enroll or register team members, click this button to access the Team Members page where you can select the team members to be enrolled or registered.

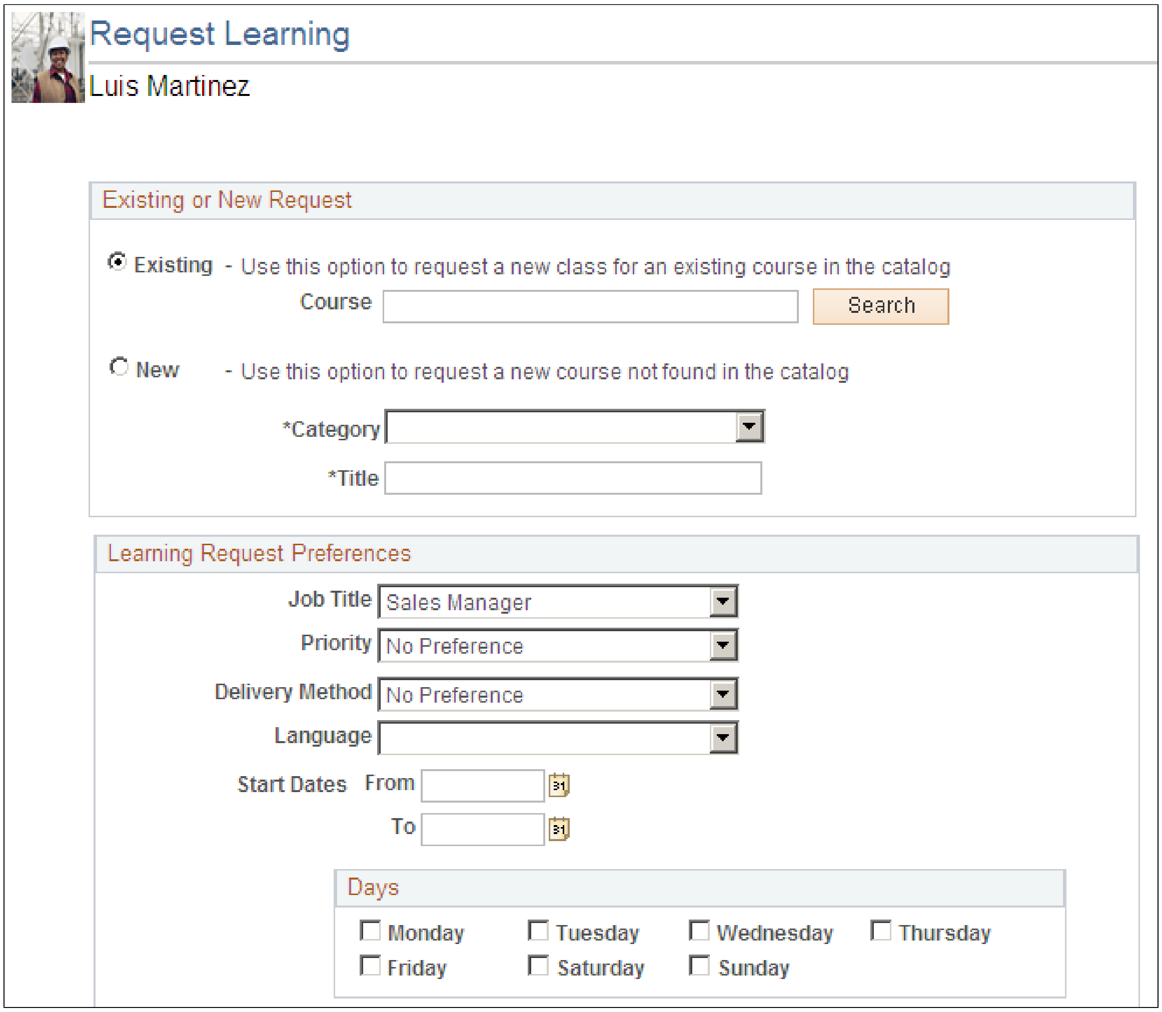
Request Learning Page

Use the Request Learning page (LM_SS_LRN_REQ) to request a new activity for an existing course or request a new course not found in the catalog.

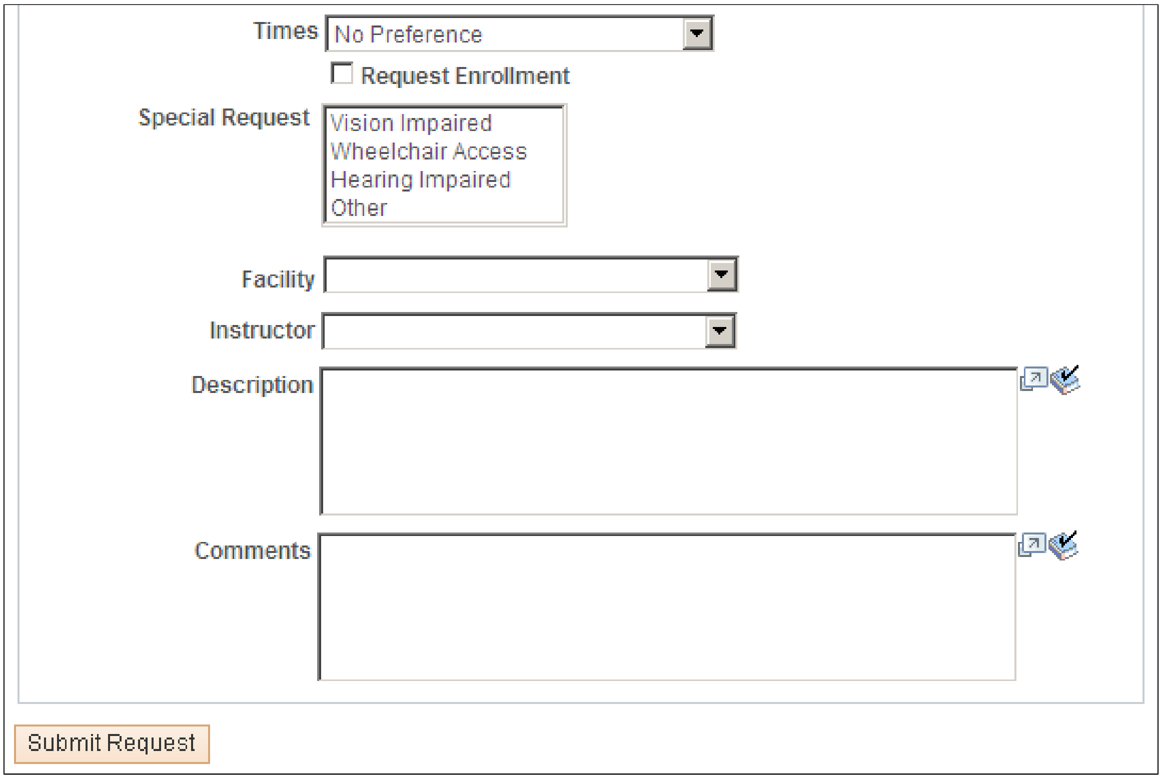
Navigation:

Click the **Request New Learning** link on the Find Learning page.

This example illustrates the fields and controls on the Request Learning page.



This example illustrates the fields and controls on the Request Learning page.



Specify whether the request is for an existing course or a new course. For existing courses, you can click the Search button to access the Find Learning component where you can search for courses for which learning requests are enabled. The user's learning environment determines the courses that are available for selection.

For a new course, you must select a category and enter a title.

Learning Request Preferences

Most of the fields that appear in this section are controlled by the settings on the Learning Request Setup Page.

Field or Control	***Description***
Job Title	The requester's primary job title always appears. If the requester has multiple jobs, you can select the relevant job title.
Start Dates	**Important!** You must enter dates in the From and To fields if you want to include the learning request in training plan reports.

Field or Control	***Description***
Request Enrollment	Select to indicate the requester's interest in enrolling when the class becomes available. This field is informational only.

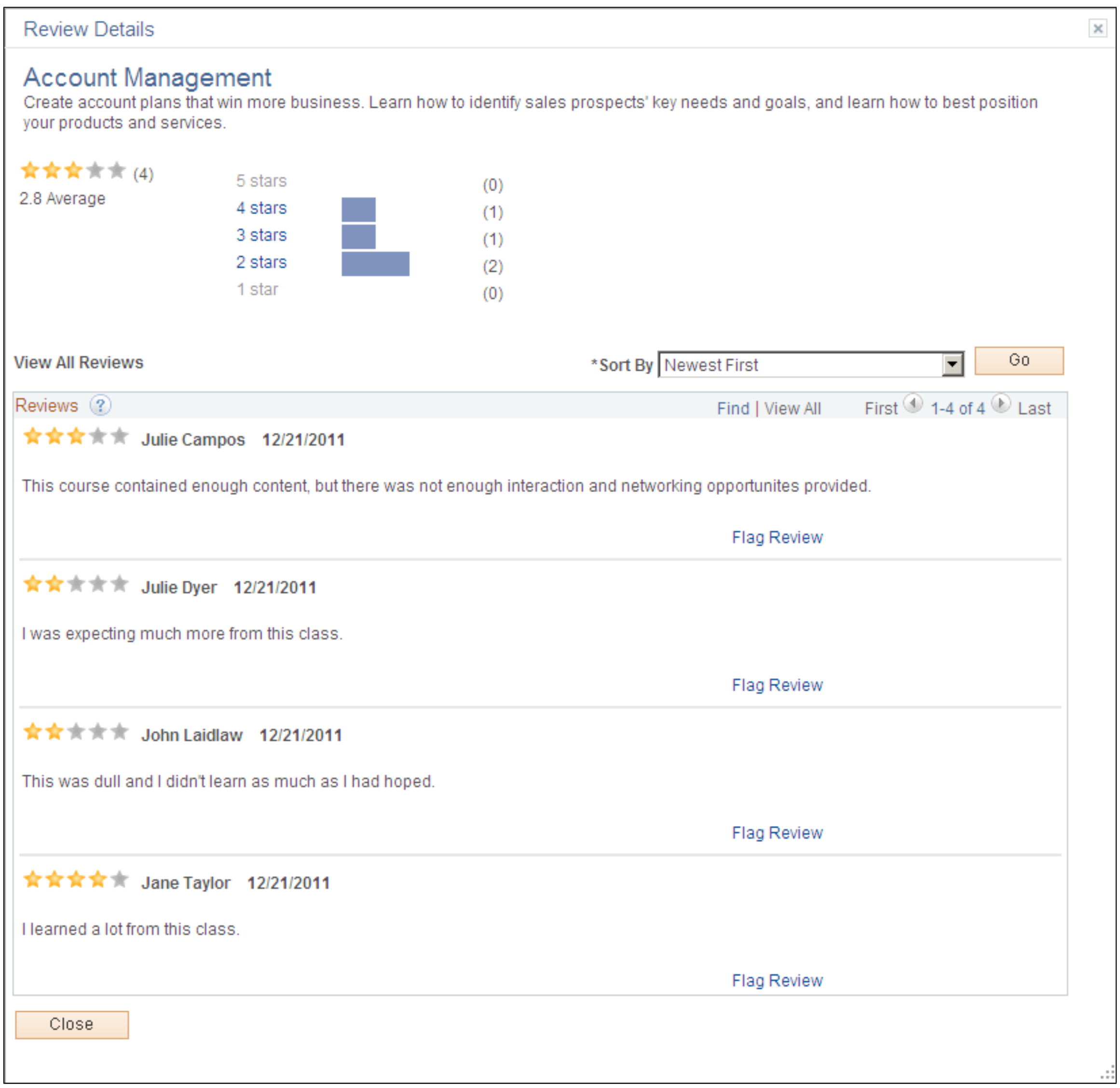
Review Details Page

Use the Review Details page (HCSC_RTG_ALL_SEC) to view ratings and reviews for a learning item.

Navigation:

Click the View Reviews link on the Find Learning page.

This example illustrates the fields and controls on the Review Details page.



Field or Control	Description
Flag Review	Click to notify the system administrator that a review might need to be deleted. For example, you might flag a review that contained abusive language. The system automatically hides a review when it is flagged a certain number of times. That number is configured on the Install Defaults – General Page.

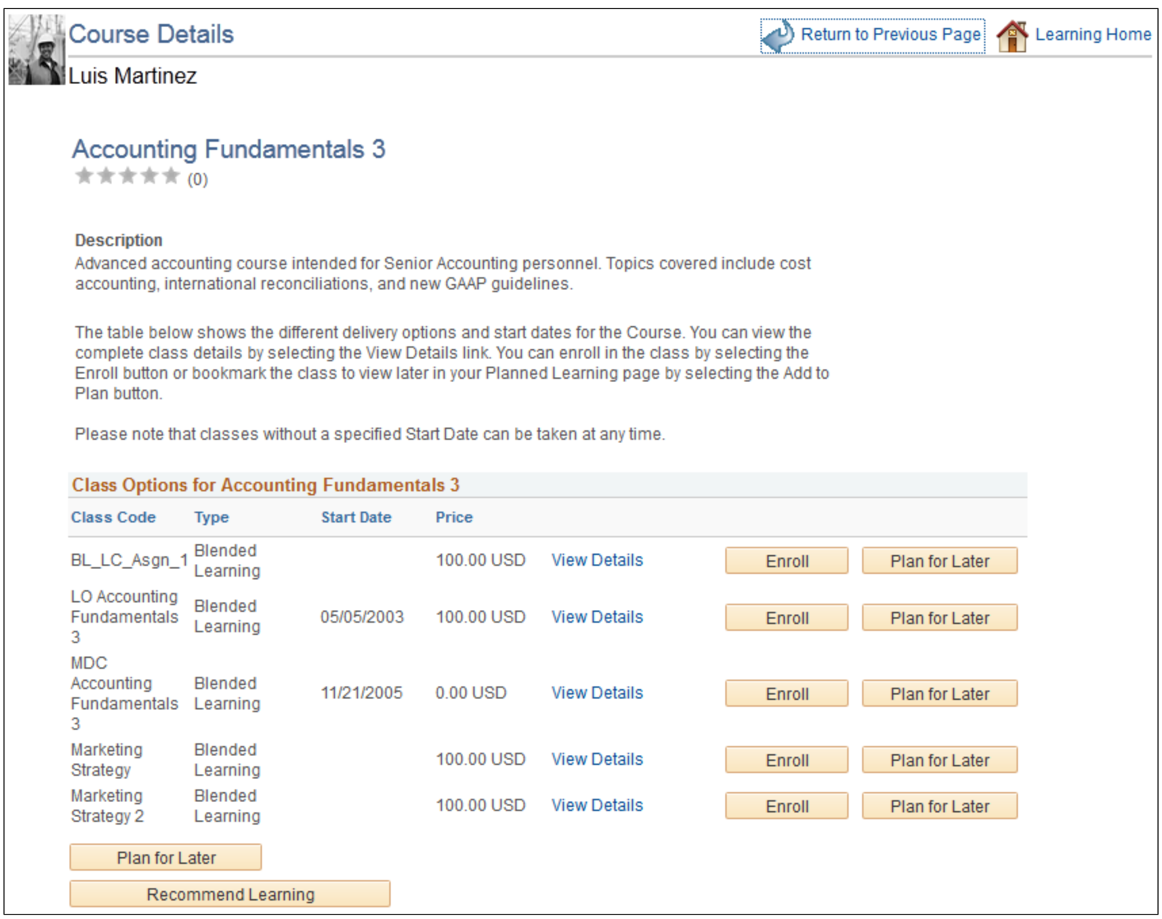
Course Details Page

Use the Course Details page (LM_SS_ITM_DTL) to review details and class options for the course.

Navigation:

Click the **View Details** link for a course on the Find Learning page.

This example illustrates the fields and controls on the Course Details page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
View Details	Click the access the Class Details Page where you can view additional details for a specific class.
Enroll	Click to access the Review Information Page where you can submit your enrollment.
Launch	Click to launch a class and enroll in it simultaneously. The **Launch** button appears for a class instead of the **Enroll** button if the following criteria are met: 1. The delivery method type associated with the class has the **Enable One-Step Launch and Enroll** check box selected on the Delivery Method Type Page. 2. The class does not require approvals. 3. The first learning component associated with the class is launchable.
Plan for Later	Click to access the Select Learning Plans Page where you can add the class or course to one of your learning plans. **Note:** Adding a class or course to your learning plan does not enroll you in the class or course.
Recommend Learning	Click to access the Recommend Learning Page where you can send a recommendation notification to another ELM user.

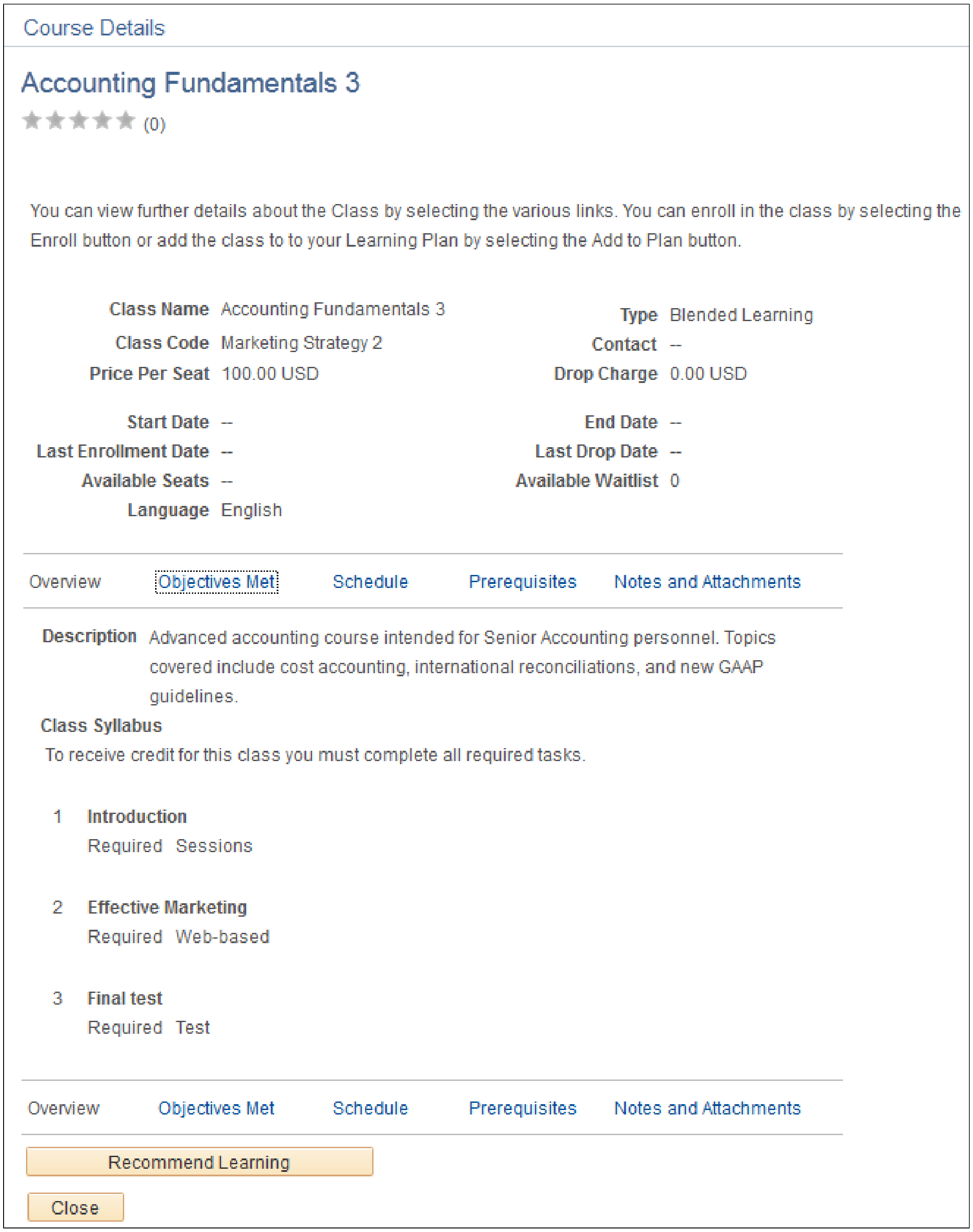
Course Details Modal Page

Use the Course Details modal page (LM_LEARN_ACT_DTL) to review details of the class, including the class syllabus and schedule, class components, related objectives, and notes and attachments.

Navigation:

Click a class code link on the Find Learning page.

This example illustrates the fields and controls on the Course Details modal page.



Field or Control	***Description***
Recommend Learning	Click to access the Recommend Learning Page where you can send a recommendation notification to another ELM user.

Overview

Click the **Overview** link to see an overview of the class material including a syllabus.

Objectives Met

Click the **Objectives Met** link to view the objectives that this class satisfies. You can click an objective to access the Objectives Detail page where you can view detailed information about the objective.

Schedule

Click the **Schedule** link to view the scheduled sessions for the class. In the Location column, you can click a link to view details about the location in which the class is being taught.

Prerequisites

Click the **Prerequisites** link to view any required prerequisites, recommended prerequisites, or equivalents for the class.

Notes and Attachments

Click the **Notes and Attachments** link to view any notes or attachments for the class.

Team Members Page

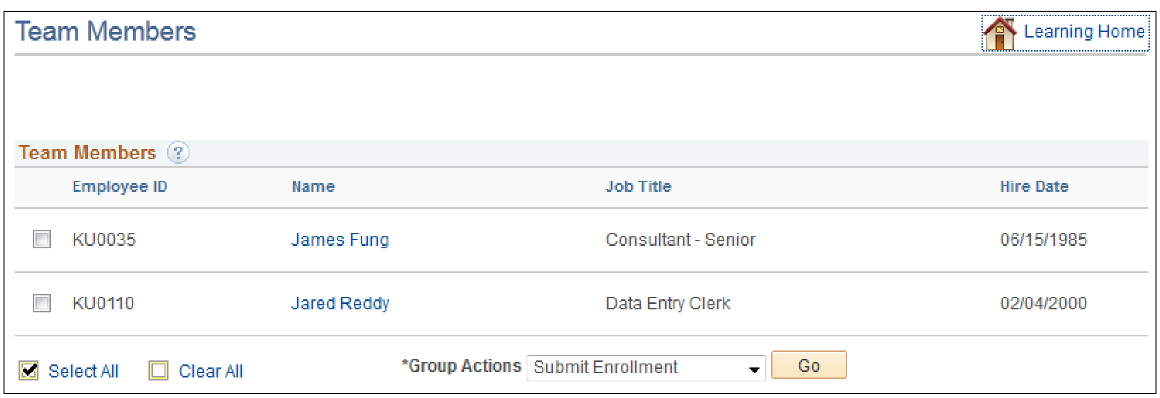
Use the Team Members page (LM_TEAM_LEARNER) to select team members for learning enrollment.

Navigation:

Manager Self Service > **Team Learning** > **Find Learning**

Click the **Plan for Later**, **Enroll**, **Register**, or **Enroll Selected Learning Items** button on the Find Learning page for managers.

This example illustrates the fields and controls on the Team Members page.



Field or Control	***Description***
Name	Click a name link to view additional details about the learner.

Field or Control	***Description***
Group Actions and **Go**	The value in the **Group Action** field is determined by the button you clicked to access the page from the Find Learning page. If you clicked **Plan for Later,** the group action is *Select Plan* and clicking the **Go** button accesses the Select Learning Plans Page. If you clicked **Enroll,** the group action is *Enroll* and clicking the **Go** button accesses the Enroll In Class Page. If you clicked **Register,** the group action is *Register* and clicking the **Go** button accesses the Register For <Program> Page. If you clicked **Enroll Selected Learning Items,** the group action is *Submit Enrollment* and clicking the **Go** button accesses the Enroll Learners - Review Enrollment (Confirmation) Page.

Review Information Page

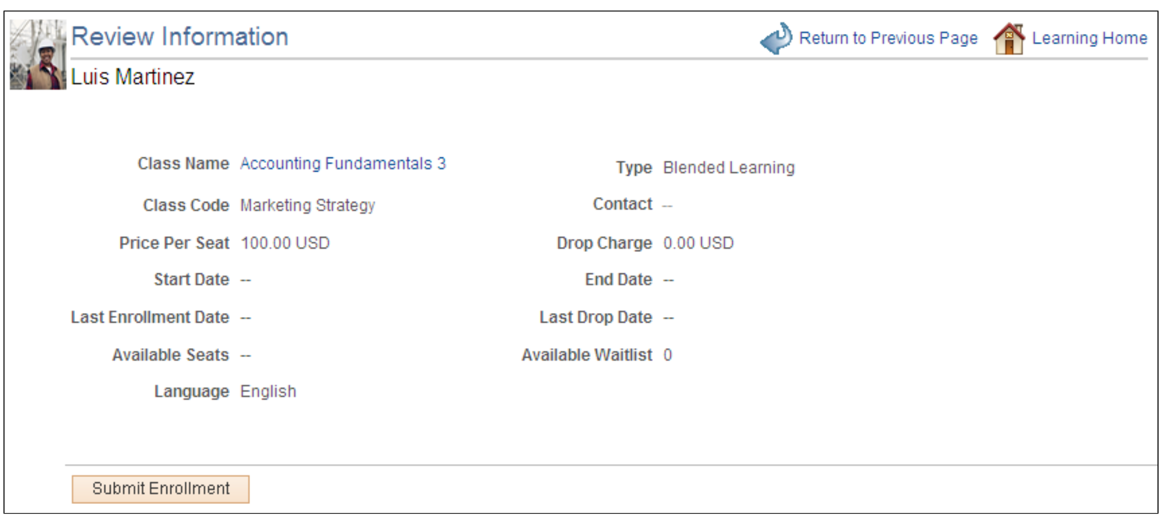
Use the Review Information page (LM_REV_ENRLMT_SS; LM_REVIEW_REG_SS) to review class or program information, and enroll in a class or register for a program.

Navigation:

Click the Enroll or Register buttons on the Find Learning page.

Note: You can suppress the appearance of this page in the enrollment or registration process using the Quick Enroll Option and Quick Register fields on the Learning Environment - Defaults Page.

This example illustrates the fields and controls on the Review Information page for classes.



Review information about the class and click **Submit Enrollment** to enroll in the class.

Field or Control	***Description***
Class Name	Click the class name to access the Class Details page.
Submit Enrollment	Click to enroll in the class. Clicking this button accesses the Review Information (Confirmation) Page. If there is an online component to this class, then after you click this button, it is replaced by the **Launch** link that enables you to launch the online component.

This example illustrates the fields and controls on the Review Information page for programs.

Field or Control	***Description***
Program Name	Click the program name to access the Program Details Page.
Submit Registration	Click to register for the program.

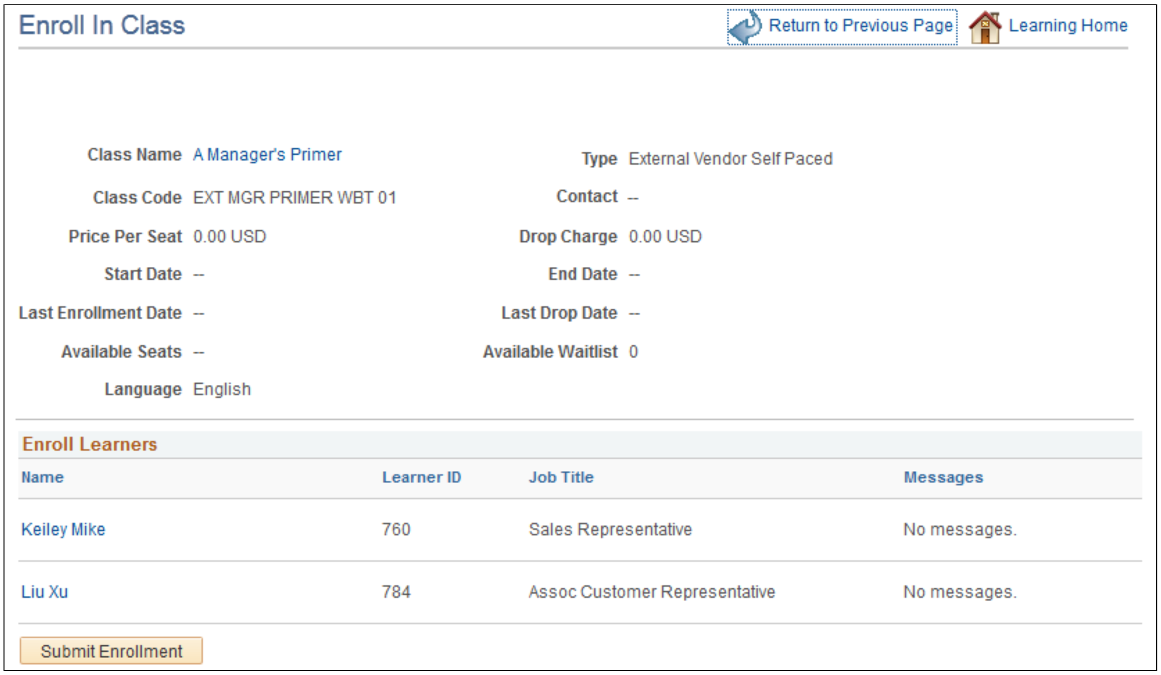
Enroll In Class Page

Use the Enroll In Class page (LM_REV_ENRLMT_TEAM) to review class information before submitting enrollment for team members.

Navigation:

Click the **Go** button for the *Enroll* group action on the Team Members page.

This example illustrates the fields and controls on the Enroll In Class page.



Field or Control	***Description***
Class Name	Click to access the Class Details page.
Name	Click a name link to access additional learner details.
Submit Enrollment	Click to submit the class enrollment for your team members. Clicking this button accesses the Enroll In Class (Confirmation) Page.

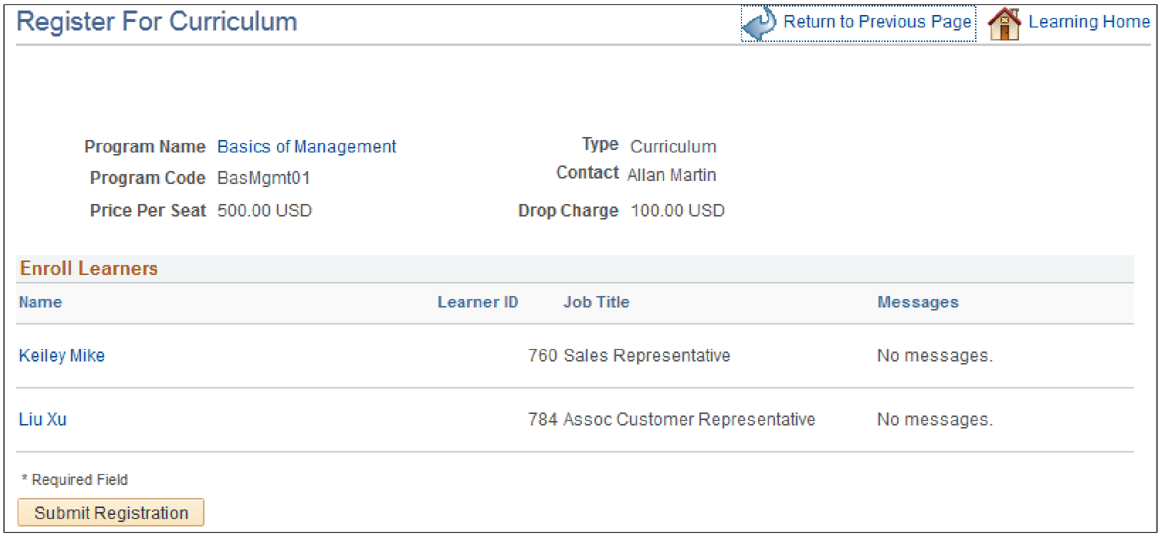
Register For <Program> Page

Use the Register For <Program> page (LM_REVIEW_GRP_REG) to review program information before submitting registration for team members.

Navigation:

Click the **Go** button for the *Register* group action on the Team Members page.

This example illustrates the fields and controls on the Register for <Program> page.



Field or Control	***Description***
Program Name	Click the access the <Program> Progress page for the program.
Name	Click a name link to view additional details for the learner.
Submit Registration	Click to register the learners in the selected program. Clicking this button accesses the Register For <Program> (Confirmation) Page.

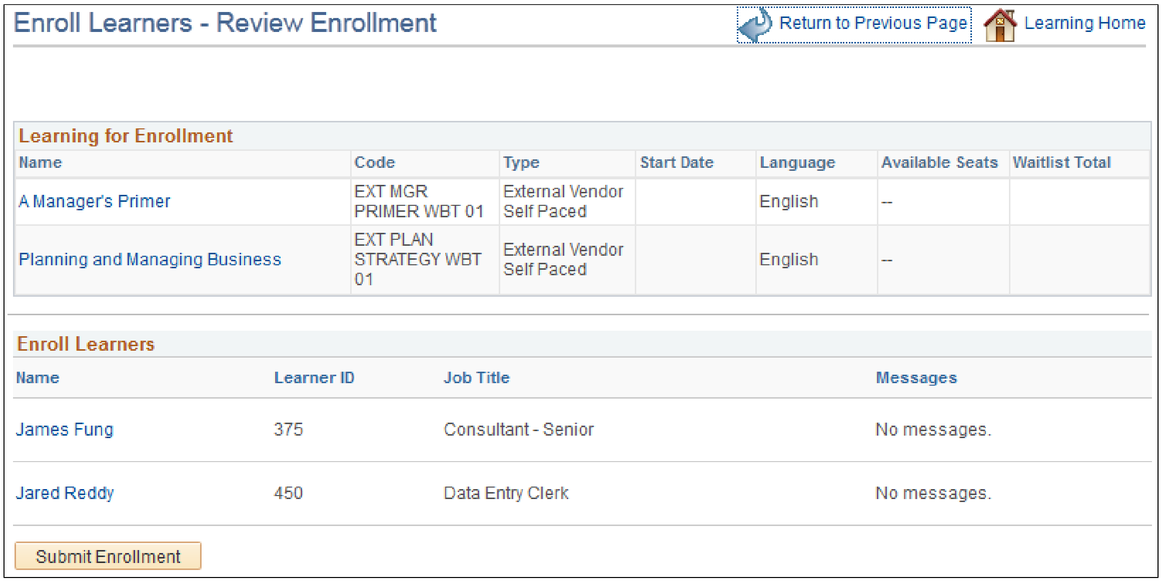
Enroll Learners - Review Enrollment Page

Use the Enroll Learners - Review Enrollment page (LM_REV_MULTI_TEAM) to review learning item information before submitting enrollment for multiple learning items.

Navigation:

Click the **Go** button for the *Submit Enrollment* group action on the Team Members page.

This example illustrates the fields and controls on the Enroll Learners - Review Enrollment page.



Learning For Enrollment

This section lists the learning items that you have selected for enrollment or registration. Click a name link to access the Class Details page or Program Details page.

Enroll Learners

This section lists the learners for which you are enrolling or registering learning items. Click a name link to access additional learner details.

Field or Control	***Description***
Submit Enrollment	Click to submit the enrollment or registration for the selected learners. Clicking this button accesses the Enroll Learners - Review Enrollment (Confirmation) Page.

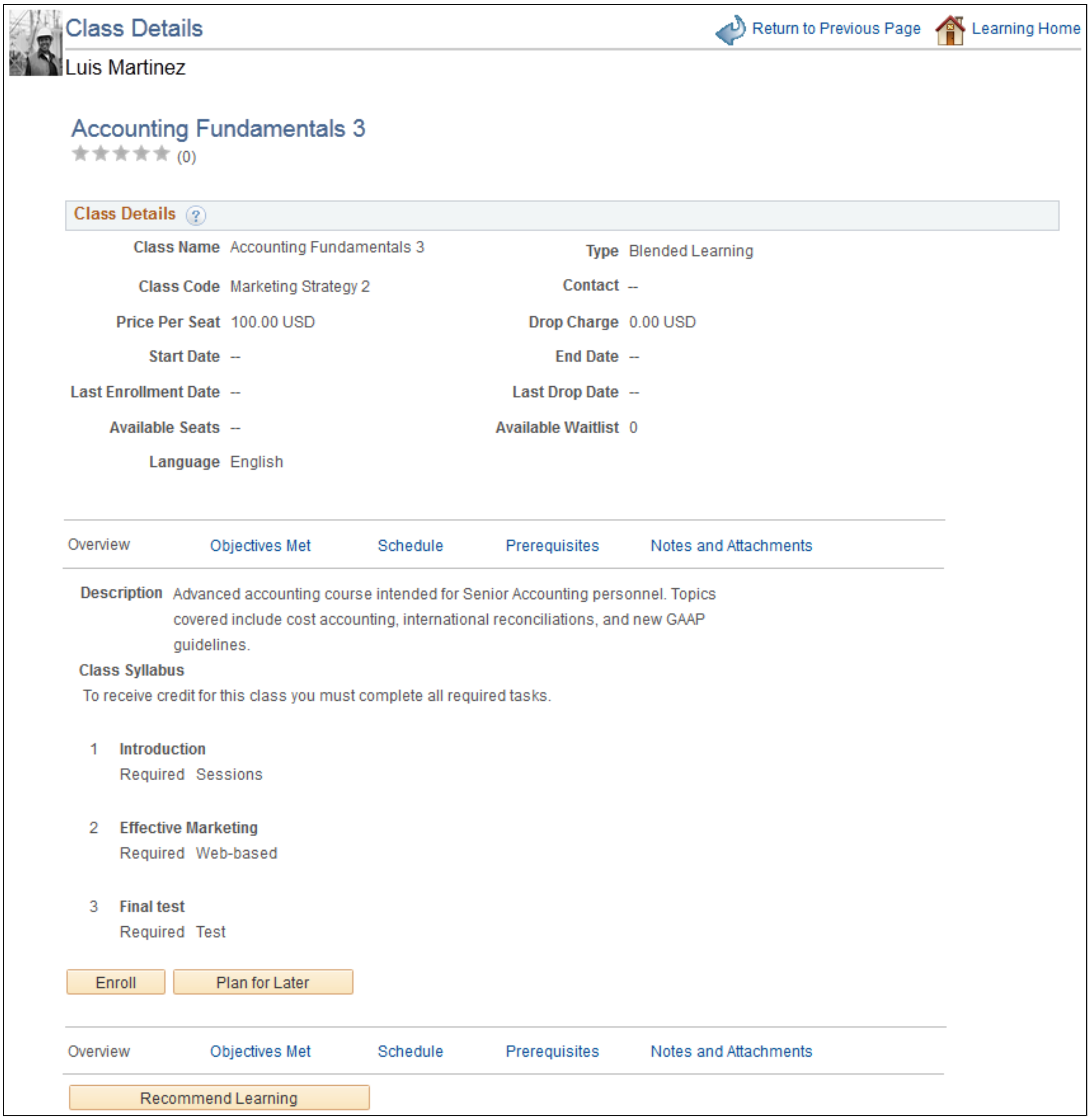
Class Details Page

Use the Class Details page (LM_SS_ACT_DTL) to review details of the class, including the class syllabus and schedule, class components, related objectives, and notes and attachments.

Navigation:

Click a class name link on the Review Information, Enroll In Class, or My Learning pages.

This example illustrates the fields and controls on the Class Details page.



Field or Control	***Description***
Enroll	Click to access the Review Information Page where you can submit your enrollment.

Field or Control	*Description*
Launch	Click to launch a class and enroll in it simultaneously. The **Launch** button appears for a class instead of the **Enroll** button if the following criteria are met: 1. The delivery method type associated with the class has the **Enable One-Step Launch and Enroll** check box selected on the Delivery Method Type Page. 2. The class does not require approvals. 3. The first learning component associated with the class is launchable.
Plan for Later	Click to access the Select Learning Plans Page where you can add the class to one of your learning plans. **Note:** Adding a class to your learning plan does not enroll you in the class.
Recommend Learning	Click to access the Recommend Learning Page where you can send a recommendation notification to another ELM user.

Overview

Click the **Overview** link to see an overview of the class material including a syllabus.

Objectives Met

Click the **Objectives Met** link to view the objectives that this class satisfies. You can click an objective to access the Objectives Detail page where you can view detailed information about the objective.

Schedule

Click the **Schedule** link to view the scheduled sessions for the class. In the Location column, you can click a link to view details about the location in which the class is being taught.

Prerequisites

Click the **Prerequisites** link to view any required prerequisites, recommended prerequisites, or equivalents for the class.

Notes and Attachments

Click the **Notes and Attachments** link to view any notes or attachments for the class.

Recommend Learning Page

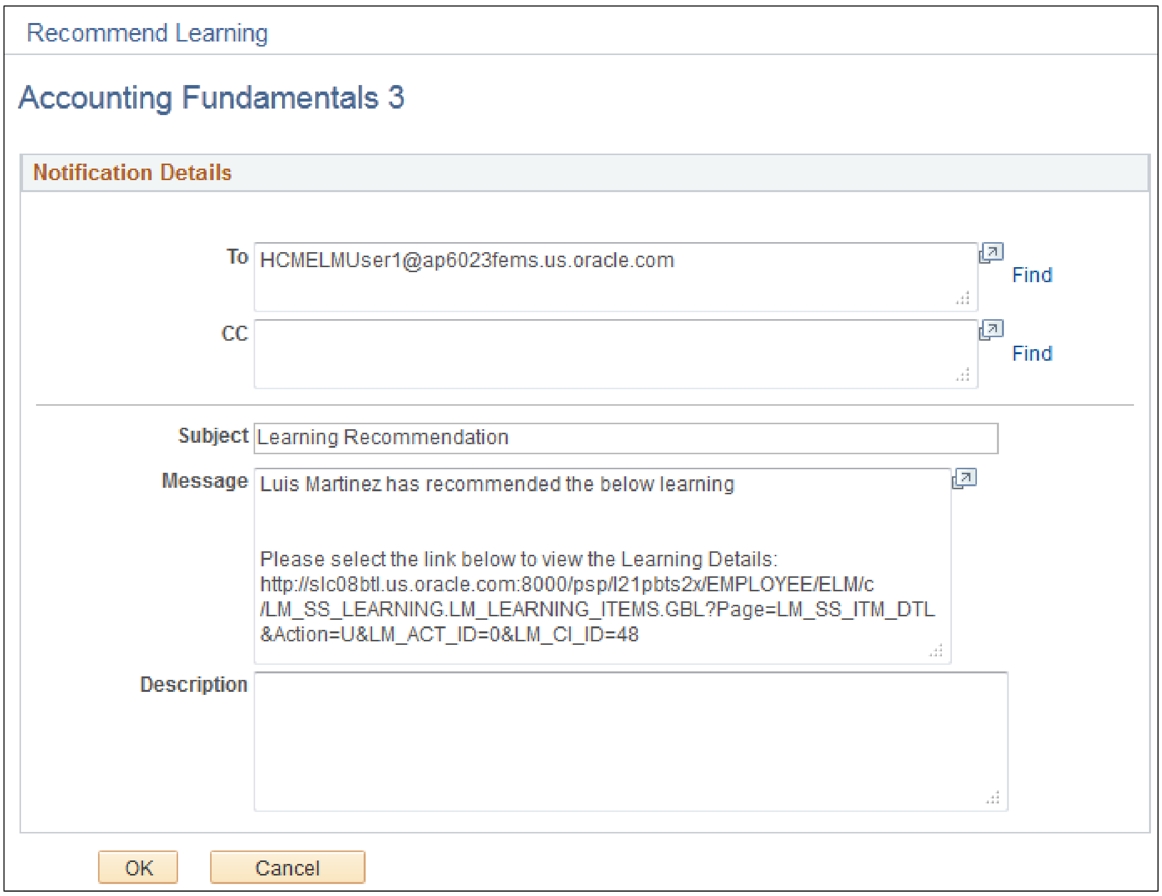
Use the Recommend Learning page (LM_RECOMMEND_LRNG) to send a recommendation notification to another ELM user for a class, course, or program.

Navigation:

Click the Recommend Learning button from any of these pages:

- Course Details Page
- Course Details Modal Page
- Program Details Page
- Class Progress Page
- <Program> Progress Page

This example illustrates the fields and controls on the Recommend Learning page. You can find definitions for the fields and controls later on this page.

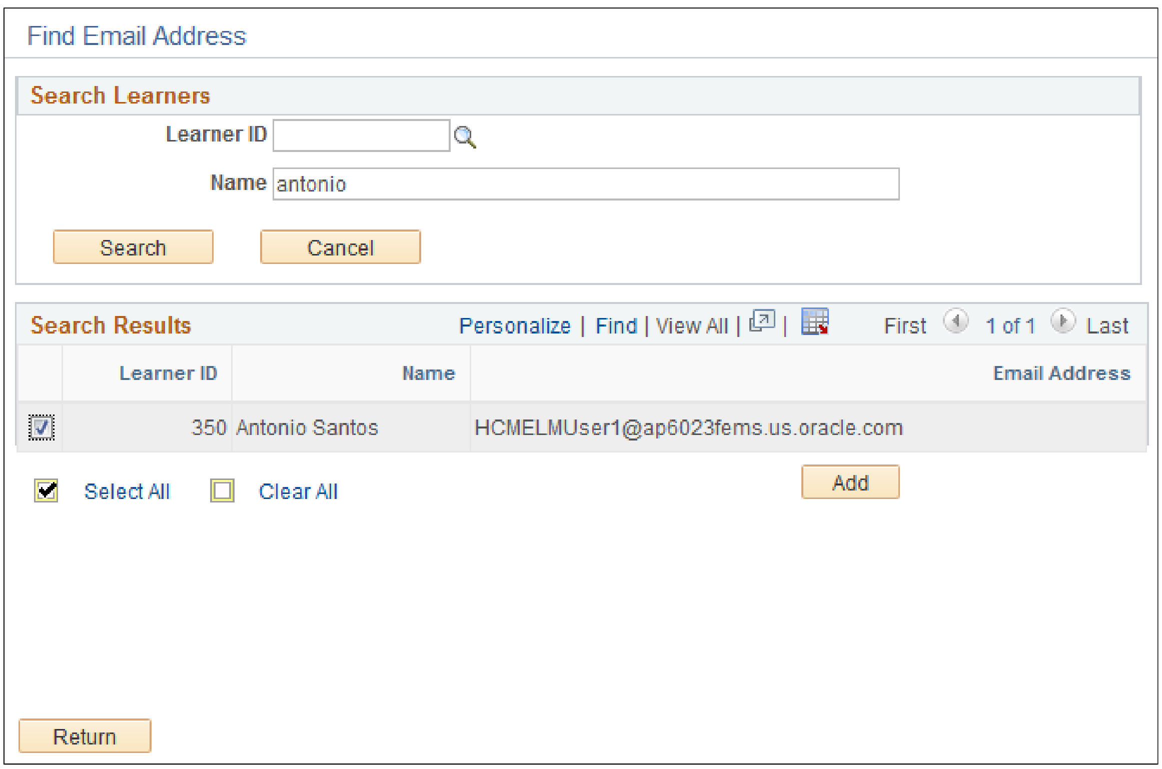


Field or Control	***Description***
To and **CC**	Enter the email addresses of the users to whom you want to send the learning recommendation.
Find	Click to access the Find Email Address modal page where you can search for and add recipients.

Field or Control	***Description***
Subject	Enter a subject title for the recommendation notification. By default, the system populates this field with the text, *Learning Recommendation*.
Message	Enter the message text of the recommendation notification. By default, the system populates this field with introductory text along with a link to the Class Details Page, Course Details Page, or Program Details Page for the learning item that you are recommending.
Description	Enter any additional descriptive text that you want to add to the learning recommendation.

Find Email Addresses

This example illustrates the fields and controls on the Find Email Addresses page. You can find definitions for the fields and controls later on this page.



Use this modal page to search for and add email recipients for your learning recommendation.

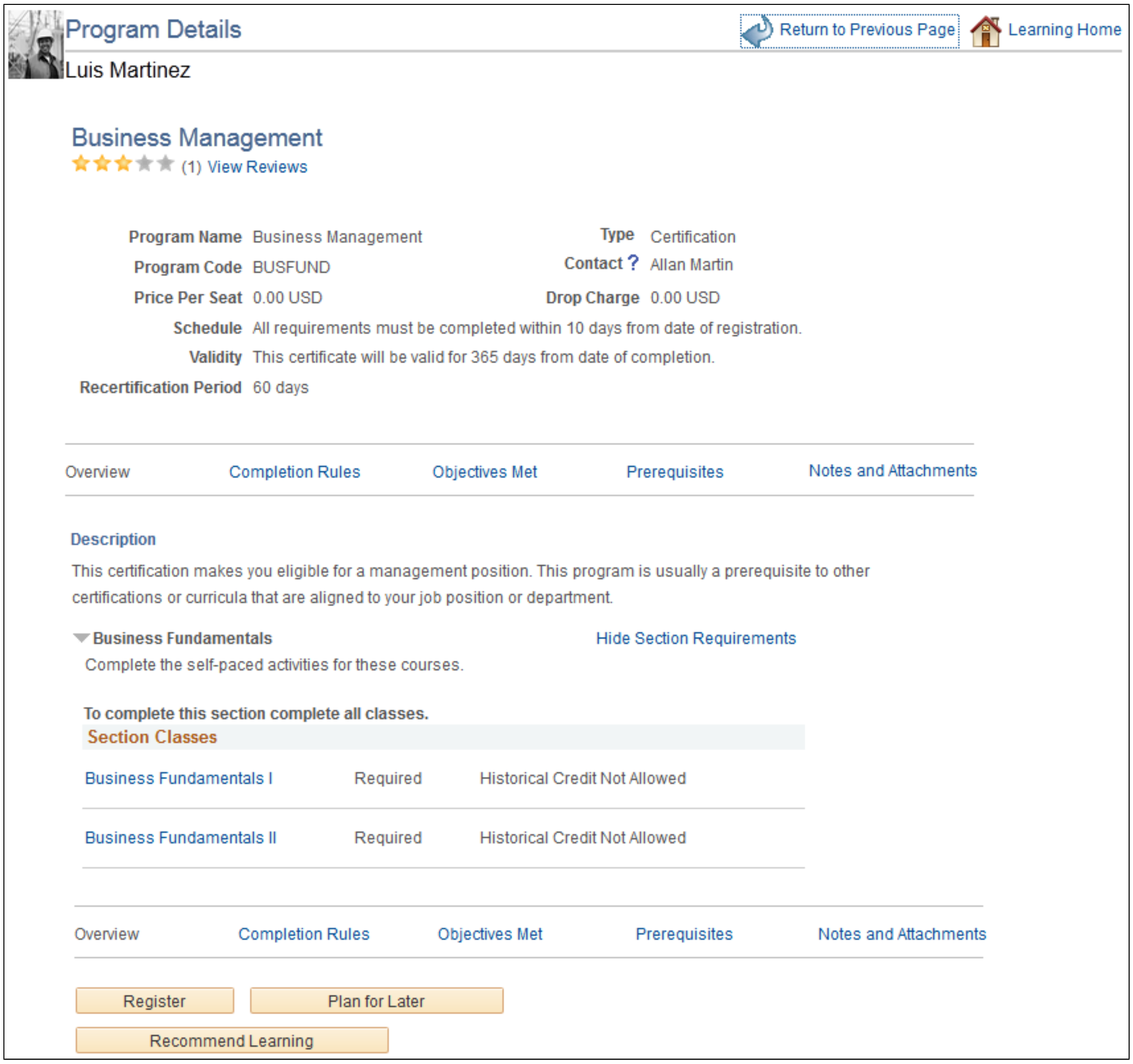
Program Details Page

Use the Program Details page (LM_PRG_SUMM_PG_SS) to view detailed information about the program including the completion rules, objectives, prerequisites, and notes and attachments.

Navigation:

- Click the View Details link for a program on the Find Learning page.
- Click a program name on the Review Information page.

This example illustrates the fields and controls on the Program Details page.



Field or Control	***Description***
Register	Click to access the Review Information Page where you can submit your registration.
Plan for Later	Click to access the Select Learning Plans Page where you can add the program to one of your learning plans. **Note:** Adding a program to your learning plan does not register you for the program.
Recommend Learning	Click to access the Recommend Learning Page where you can send a recommendation notification to another ELM user.

Overview

Click the **Overview** link to see an overview of the program including the classes that it comprises. You can click a class name link to access the Course Details Page where you can view detailed information about the class.

Completion Rules

Click the **Completion Rules** link to view any completion rules that have been defined for the program.

Objectives Met

Click the **Objectives Met** link to view the objectives that this program satisfies. You can click an objective to access the Objectives Detail page where you can view detailed information about the objective.

Prerequisites

Click the **Prerequisites** link to view any required prerequisites, recommended prerequisites, or equivalents for the program.

Notes and Attachments

Click the **Notes and Attachments** link to view any notes or attachments for the program.

Associated Programs Page

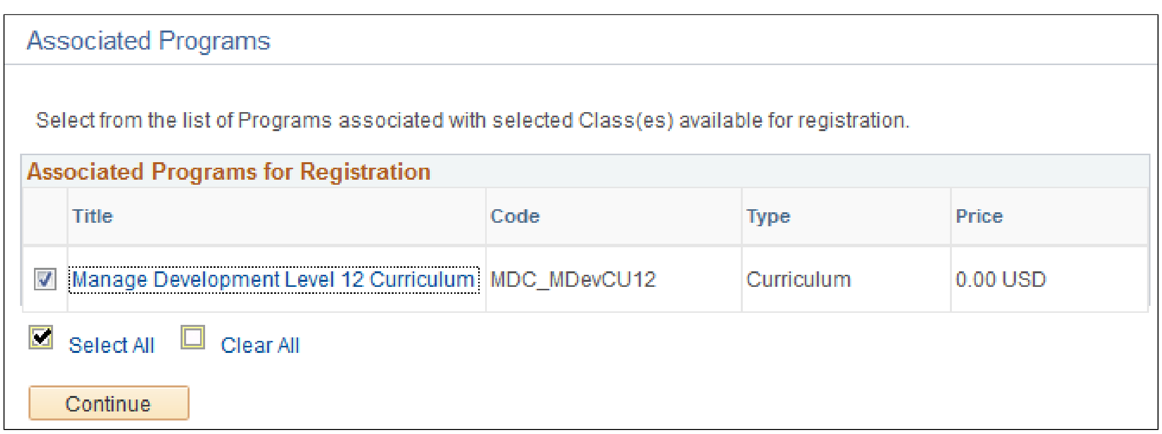
Use the Associated Programs page to select the associated programs to be automatically registered when you submit your class enrollment.

Navigation:

Click the Submit Enrollment button on the Review Information page.

Note: Whether this modal page appears for a learner is determined by the value selected for the **Auto-Register based on Enrollment** field on the Learning Environments - Defaults page.

This example illustrates the fields and controls on the Associated Programs page.



Field or Control	***Description***
Title	Click a program title link to access the Program Details page where you can view additional details about the program.
Continue	Click to complete enrollment in the class and registration in the selected associated programs.

Review Information (Confirmation) Page

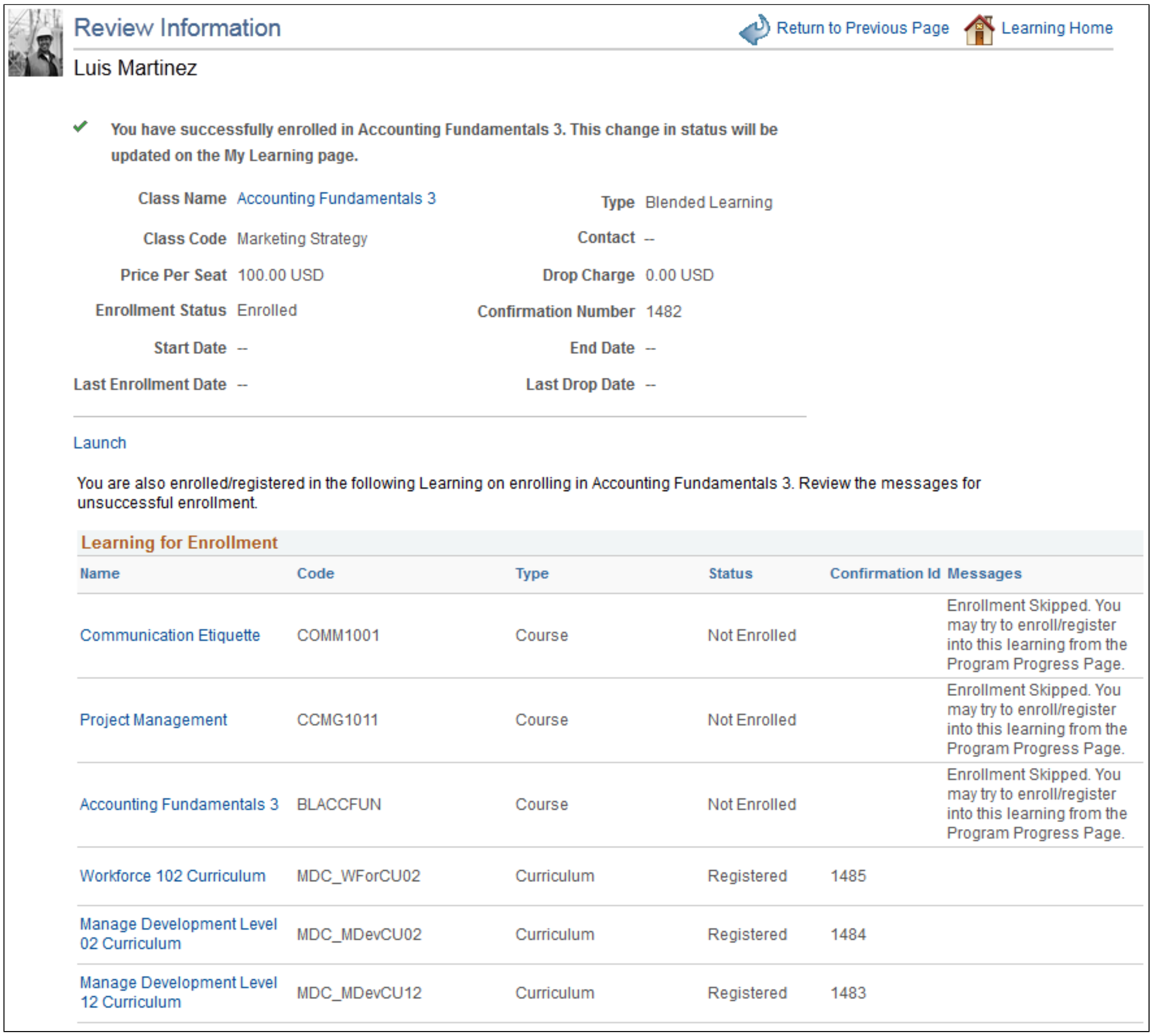
Use the Review Information (confirmation) page to view a confirmation of your class enrollment.

Navigation:

Click the Submit Enrollment button on the Review Information page.

Note: You can suppress the appearance of this page in the enrollment process using the Quick Enroll Option field on the Learning Environment - Defaults Page.

This example illustrates the fields and controls on the Review Information (confirmation) page.



Field or Control	*Description*
Class Name	Click to access the Class Details page for the class.
Launch	Click to launch the web-based portion of the class.

Learning for Enrollment

The section appears only if you have automatically registered for a program in conjunction with the class enrollment. It lists the programs in which you automatically registered along with the classes the comprise the sections of those programs.

Field or Control	*Description*
Name	Click a class name link to access the Class Details page. Click a program name link to access the Program Details page.

Registration Confirmation Page

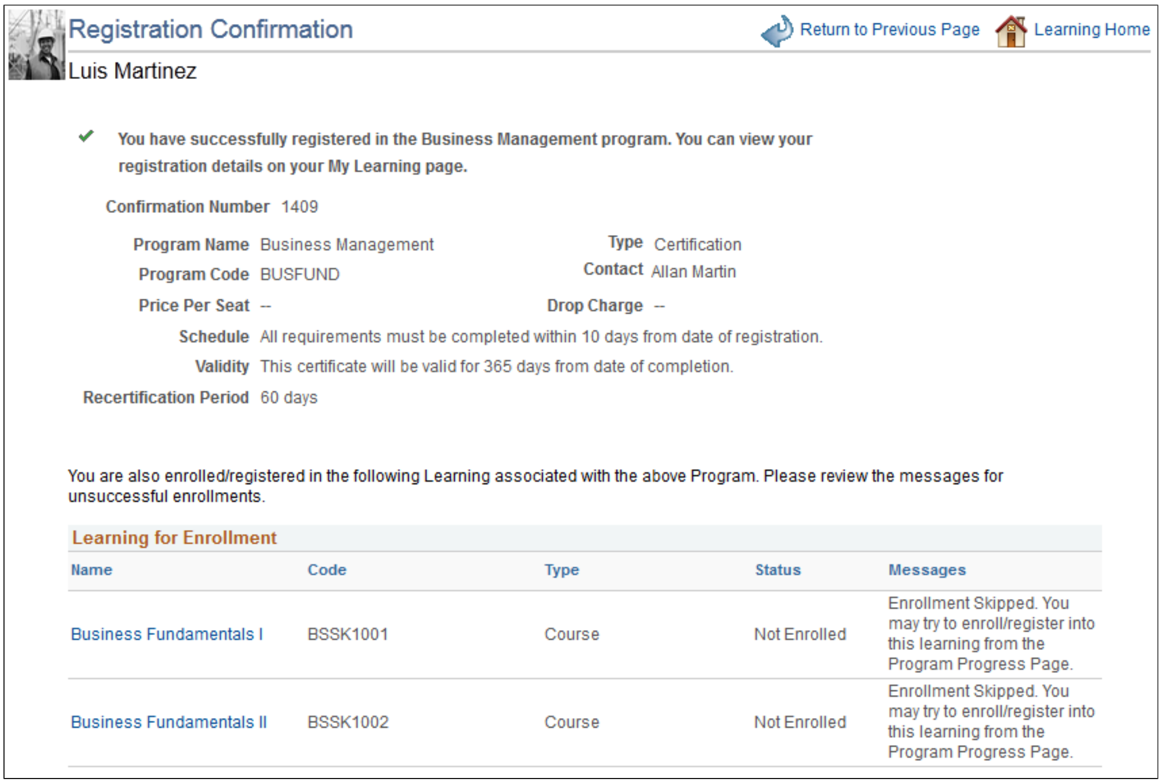
Use the Registration Confirmation page (LM_CONF_REG_SS) to view a confirmation of your program registration.

Navigation:

Click the Submit Registration button on the Review Information page.

Note: You can suppress the appearance of this page in the enrollment process using the Quick Register Option field on the Learning Environment - Defaults Page.

This example illustrates the fields and controls on the Registration Confirmation page.



Learning for Enrollment

This section of the page displays information about the classes that comprise the sections of the program in which you registered.

Note: This section of the page appears only if program automatic enrollment is enabled for the type of program in which you registered. For more information on the Program Auto-Enrollment Option field see the documentation for the Install Defaults – Programs Page.

Field or Control	***Description***
Name	If you were not automatically enrolled in the class, click this link to access a page with additional class details and enrollment options. If you were automatically enrolled in the class, click this link to access the Class Details page for the class.
Messages	Displays messages explaining whether you were enrolled in the class and what further enrollment steps are necessary.

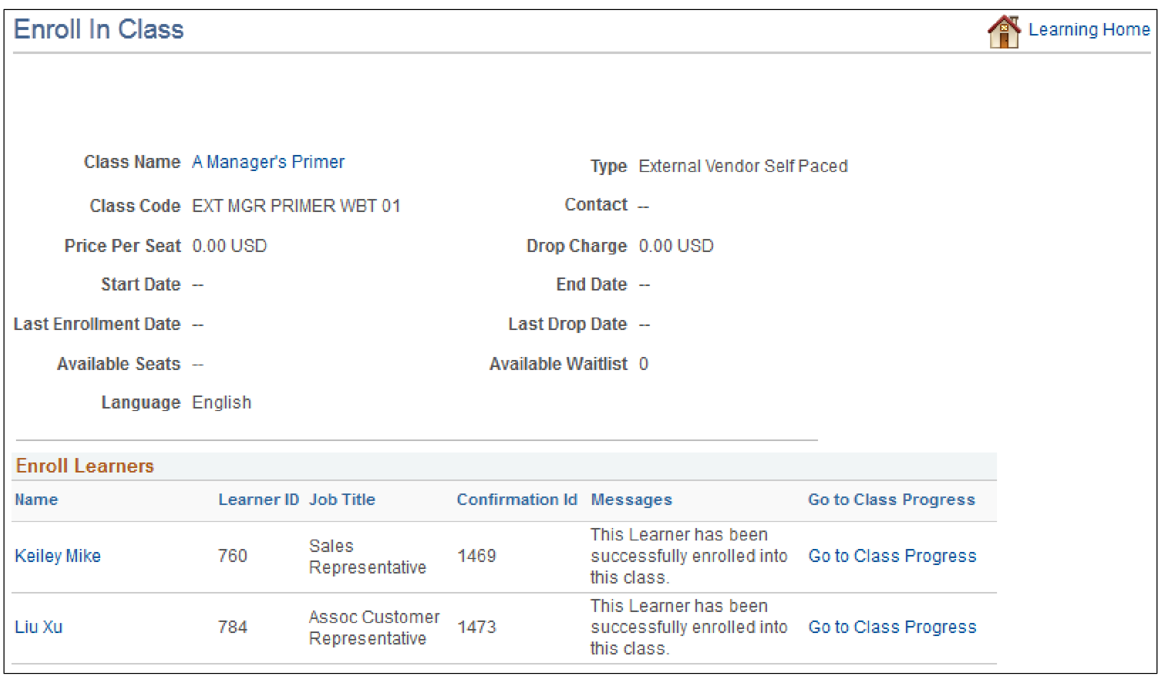
Enroll In Class (Confirmation) Page

Use the Enroll In Class (confirmation) page (LM_CONF_ENRLT_TEAM) to view a confirmation of team member class enrollment.

Navigation:

Click the **Submit Enrollment** button on the Enroll In Class page.

This example illustrates the fields and controls on the Enroll In Class (confirmation) page.



Field or Control	***Description***
Class Name	Click to access the Class Details page for the class.
Name	Click a name link to review details about the learner.

Field or Control	***Description***
Go to Class Progress	Click to access the Class Progress page for the associated learner and class.

Register For <Program> (Confirmation) Page

Use the Register For <Program> (confirmation) page to review program information before submitting registration for team members.

Navigation:

Click the **Submit Registration** button on the Register For <Program> page.

This example illustrates the fields and controls on the Register For <Program> (confirmation) page.

Field or Control	***Description***
Program Name	Click to access the <Program> Progress page for the program.
Name	Click a name link to review details about the learner.
Go To Program Details	Click to access the <Program> Progress page for the learner.

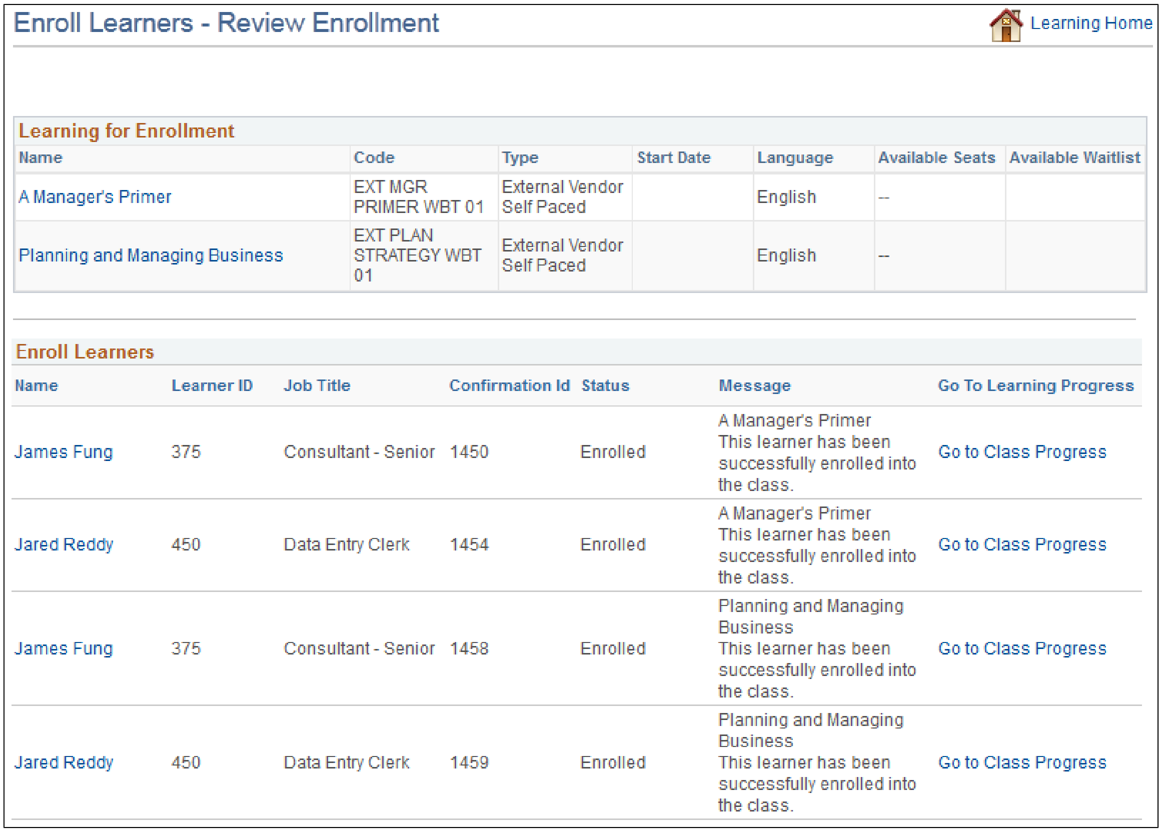
Enroll Learners - Review Enrollment (Confirmation) Page

Use the Enroll Learners - Review Enrollment (confirmation) page (LM_CONF_MULTI_TEAM) to view a confirmation of team member enrollment or registration in multiple learning items.

Navigation:

Click the **Submit Enrollment** button on the Enroll Learners - Review Enrollment page.

This example illustrates the fields and controls on the Enroll Learners - Review Enrollment (confirmation) page.



Learning For Enrollment

This section lists the learning items that you selected for enrollment or registration. Click a name link to access the Class Details page or Program Details page.

Enroll Learners

This section lists the learners for which you enrolled or registered learning items. Click a name link to access additional learner details.

Field or Control	***Description***
Go to Class Progress	Click to access the Class Progress page for the selected class and learner.
Go to Program Progress	Click to access the <Program> Progress page for the selected program and learner.

Chapter 25

Managing Learning Requests

Understanding Learning Requests

Learning requests enable users to request new courses and classes. A learning request could be made in any of the following situations:

- Learning is not available at all.
- Learning exists, but the user is unable to find a class to enroll in.
- Learning exists, and all classes are full or waitlisted, and the user would like to request additional sessions.

Administrators and managers can submit learning requests for groups of learners by requesting a specific number of seats or by naming learners individually. Learners can also submit requests on their own behalf. When submitting a learning request, the requester can enter preferences, such as preferred dates, times, and delivery method. You can configure the types of information to collect in the requests.

Learning Request Management

Administrators can use the Maintain Learning Requests component to review learning requests and determine what action to take, such as create a new class and enroll learners, recommend existing learning, or let the requestor know that no learning will be offered for their request. Administrators can also modify and delete requests. Notifications can be sent when a request is denied, can be fulfilled by an existing class, or can be met through a new offering.

Learning Request Activation and Thresholds

When submitting learning requests, administrators, managers, and learners can request a new class for an existing course only if that item is configured to accept learning requests. To enable learning requests for a particular course, use the Item - Details page.

Learning request thresholds enable the system to automatically notify administrators when a specified number of requests are submitted for a particular course. You can set this threshold on the Install Defaults - Enrollment page and override this value for a particular learning environment on the Learning Environment - Defaults page. Administrators can also override the threshold for a given course. To generate the notifications, you must run the Threshold Notifications process (LM_LRQ_TNOTF) process.

Learning Requests and Training Plans

If you use Enterprise Learning Management to create training plans, you can use learning requests to forecast the demand for training.

(FRA) Administrators can specify the number of employees that a request represents by various learning request criteria such as gender, age bracket, learning classification, and employee category. This information is included in the training plan reports.

See Understanding Training Plans.

Setting Up Learning Requests

Use the Learning Request Setup (LM_LRQ_SETUP) and the Learning Request Criteria (LM_LRQ_CRIT_FRA) components to set up learning requests.

Pages Used to Set Up Learning Requests

Page Name	***Definition Name***	***Usage***
Learning Request Setup Page	LM_LRQ_SETUP	Select displayed fields for learning requests.
(FRA) Learning Request Criteria Page	LM_LRQ_CRIT_FRA	Maintain learning request criteria.

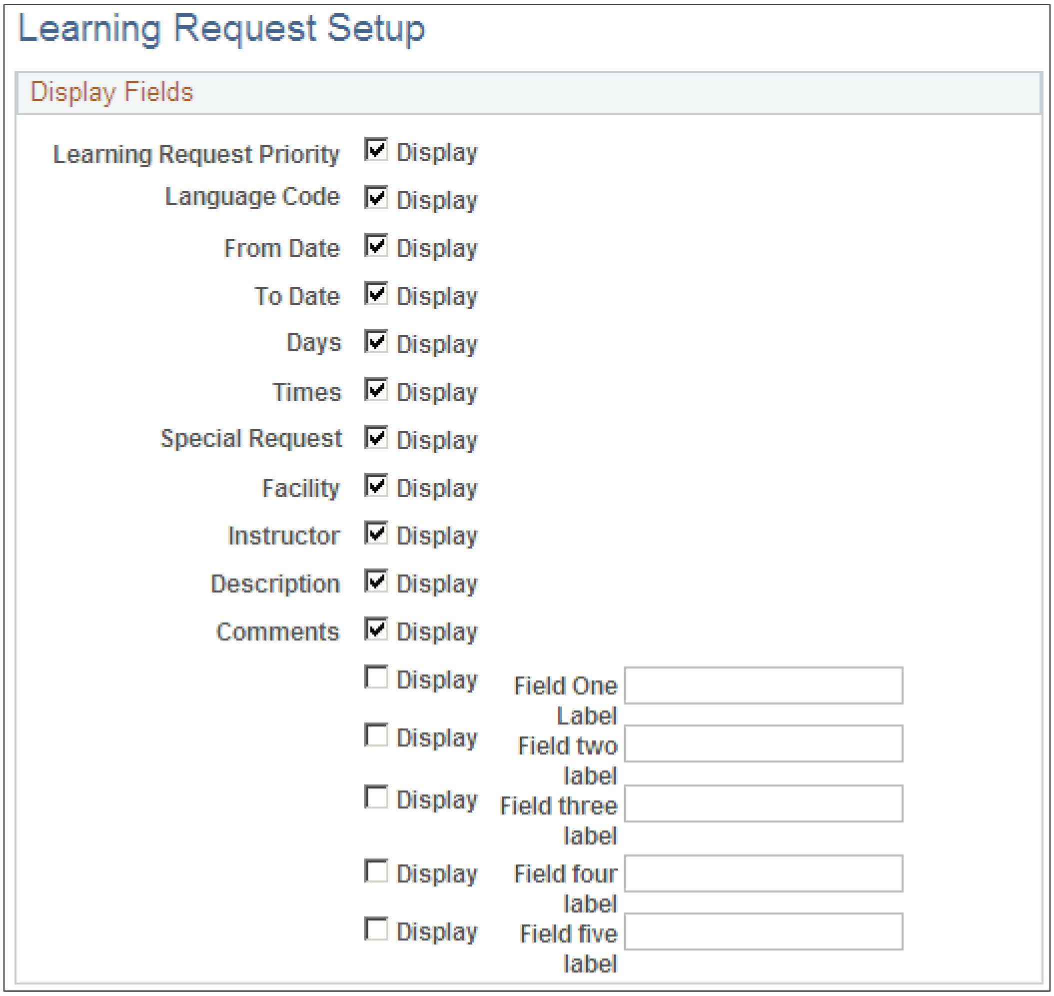
Learning Request Setup Page

Use the Learning Request Setup page (LM_LRQ_SETUP) to select displayed fields for learning requests.

Navigation:

Set Up ELM > **Catalog** > **Learning Request Setup** > **Learning Request Setup**

This example illustrates the fields and controls on the Learning Request Setup page.



Display Fields

Select fields that you want to display on the learning request pages for administrators and self-service users. Fields appear in the order listed here. The learning request pages include additional fields that are not selectable.

Field or Control	***Description***
Learning Request Priority	When selected, requesters will be able to choose from the following priorities when submitting a request: *Career goal, No preference, Required for Job, Required to Complete Objective,* and *Voluntary.*

Field or Control	***Description***
From Date and **To Date**	These fields enable requesters to enter a range of class start dates. **Important!** You must select these fields if you want to include learning requests in training plan reports. The system uses the dates provided in the learning request to determine whether to include the request in a training plan.
Days	When selected, requesters can select the preferred days of the week for the class.
Times	When selected, requesters can choose between the following times: *Afternoon, Evening, Morning, No Preference.*
Special Request	When selected, requesters can select from the following: *Wheelchair Access, Hearing Impaired, Other,* and *Vision Impaired.*
Facility	When selected, requesters can choose from any of the facilities defined through the Facilities component (LM_FCLTY_TBL).
Field One Label...Field five label	You can enter field labels for additional data that you want to capture for learning requests. The data that learners subsequently enter in these fields on the Learning Request page is for information purposes only.

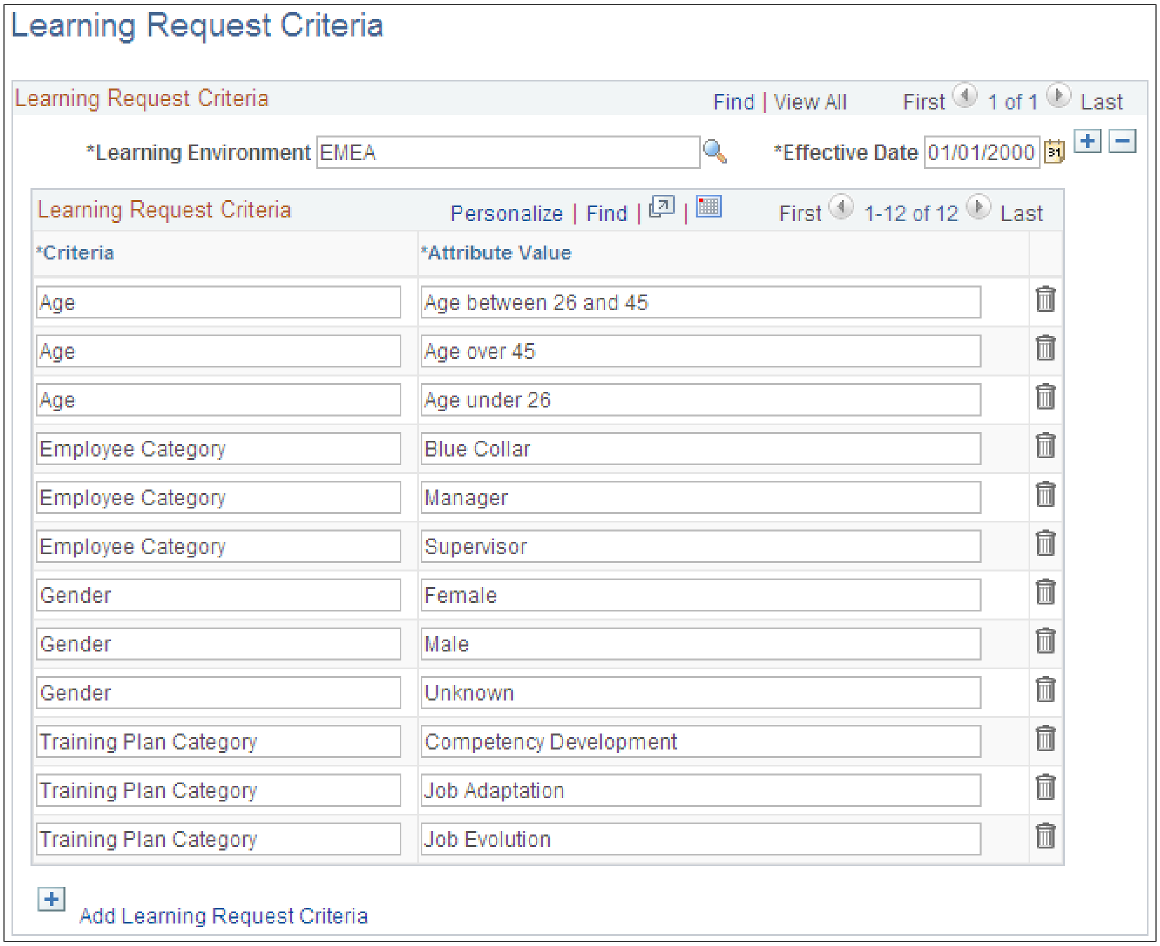
(FRA) Learning Request Criteria Page

Use the Learning Request Criteria page (LM_LRQ_CRIT_FRA) to maintain learning request criteria.

Navigation:

Set Up ELM > **Resources** > **Learning Request Criteria** > **Learning Request Criteria**

This example illustrates the fields and controls on the Learning Request Criteria page.



Use this page to update and maintain the learning request criteria that you use to enter counts on the Submit Learning Requests - Details: Training Plan Attributes and Maintain Learning Requests - Details: Training Plan Attributes pages. Each learning environment has its own effective-dated set of learning request criteria.

Field or Control	***Description***
Criteria	Enter a type of criteria by which you want administrators to enter counts for learning requests. Each unique criteria name entered is available in the Count of learners by field on the Submit Learning Requests - Details: Training Plan Attributes and Maintain Learning Requests - Details: Training Plan Attributes pages.
Attribute Value	Enter an attribute value for the corresponding criterion.

Submitting Learning Requests

Pages Used to Submit Learning Requests

Page Name	***Definition Name***	***Usage***
Submit Learning Requests - Find Requesters Page	LM_LRQ_REQSTR_SRCH	Search for and select the learner who is requesting learning.
Submit Learning Requests - Details: General Attributes Page	LM_ADM_NEW_LRQ_DTL	Identify the requested learning and enter preferences for the dates, times, location, and other attributes.
Submit Learning Requests - Details: Training Plan Attributes Page	LM_ADM_NEW_LRQ_DTL	Enter information that is specific to training plans.
Submit Learning Requests - Details (seats) Page	LM_ADM_LRQ_LRNRS	Specify the number of seats for a learning request or select the learners by name.
Learning Request Confirmation Page	LM_AD_LRN_REQ_CONF	Confirms the submission of a learning request.

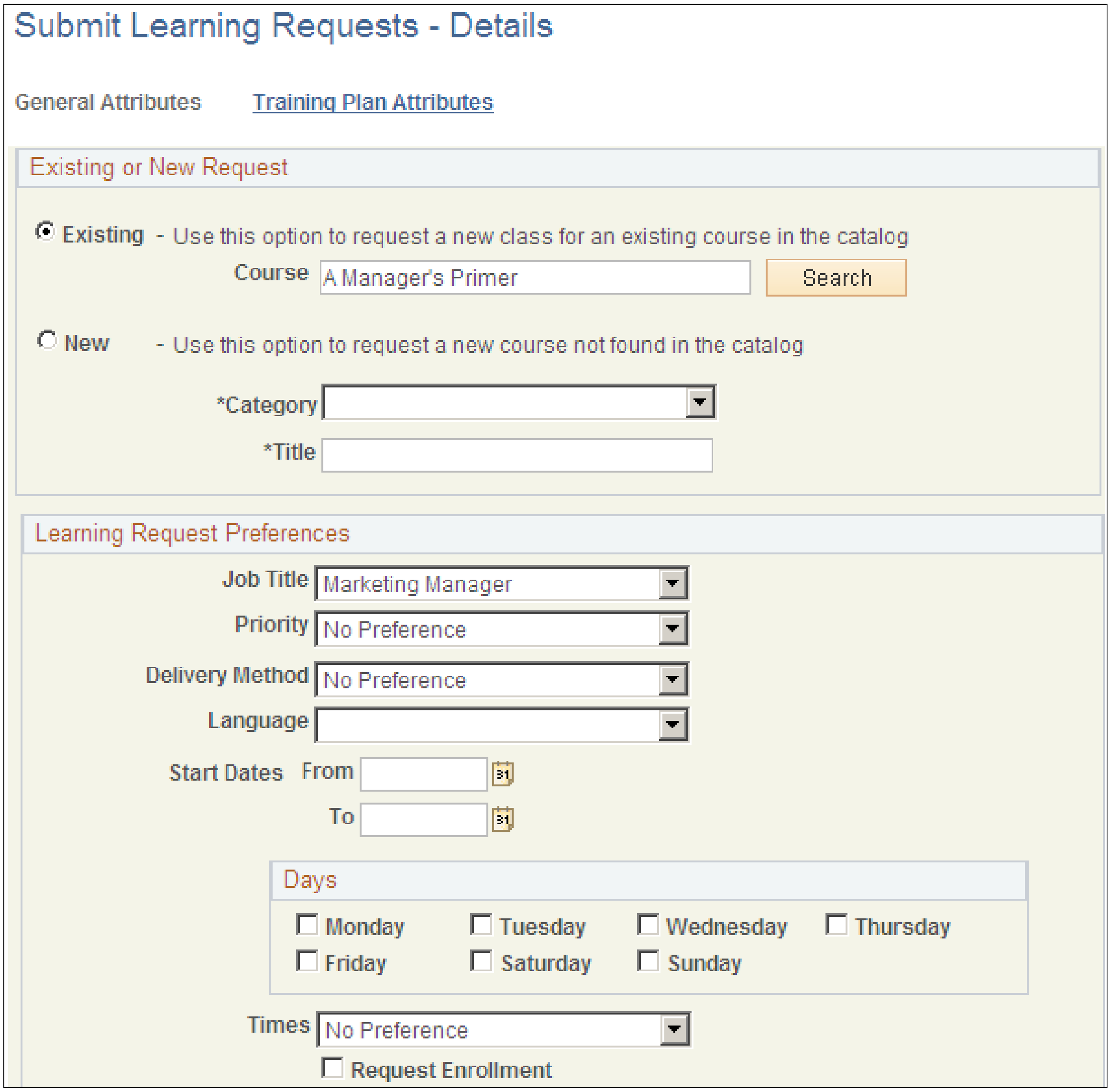
Submit Learning Requests - Details: General Attributes Page

Use the Submit Learning Requests - Details: General Attributes page (LM_ADM_NEW_LRQ_DTL) to identify the requested learning and enter preferences for the dates, times, location, and other attributes.

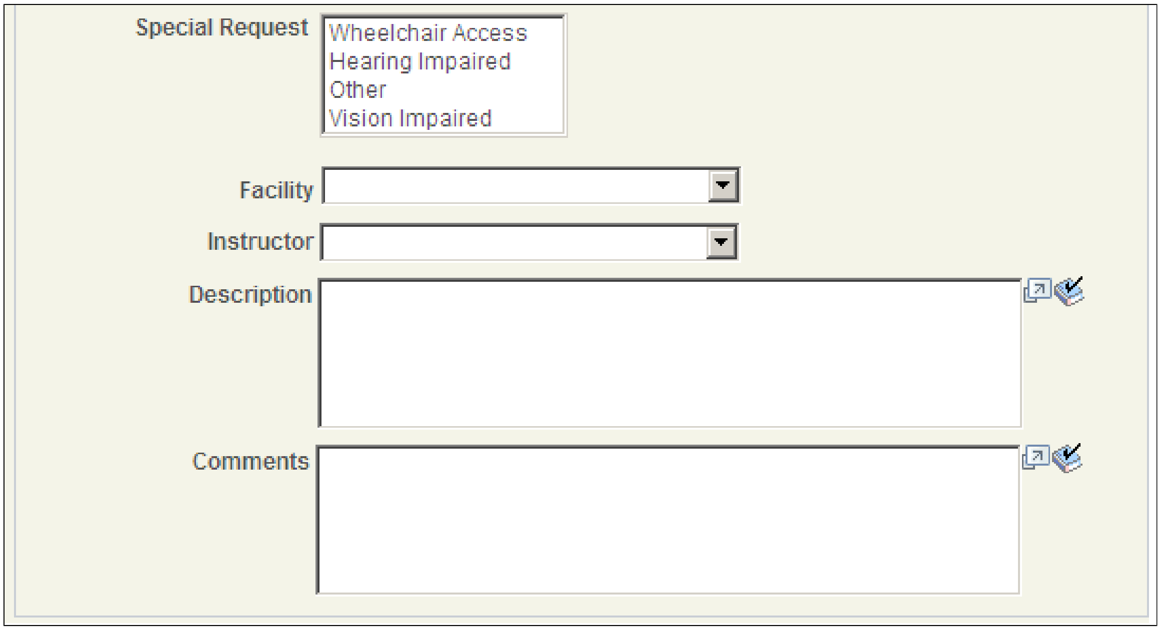
Navigation:

Click the Select button for a requester on the Submit Learning Requests - Search Requesters page.

This example illustrates the fields and controls on the Submit Learning Requests - Details: General Attributes page (1 of 2).



This example illustrates the fields and controls on the Submit Learning Requests - Details: General Attributes page (2 of 2).



Specify whether the request is for an existing course or a new course. For existing courses, you can click the Search button to access the Find Learning component where you can search for courses for which learning requests are enabled. The user's learning environment determines the courses that are available for selection.

For a new course, you must select a category and enter a title.

Learning Request Preferences

Most of the fields that appear in this section are controlled by the settings on the Learning Request Setup Page.

Field or Control	***Description***
Job Title	The requester's primary job title always appears. If the requester has multiple jobs, you can select the relevant job title.
Start Dates	**Important!** You must enter dates in the From and To fields if you want to include the learning request in training plan reports.
Request Enrollment	Select to indicate the requester's interest in enrolling when the class becomes available. This field is informational only.

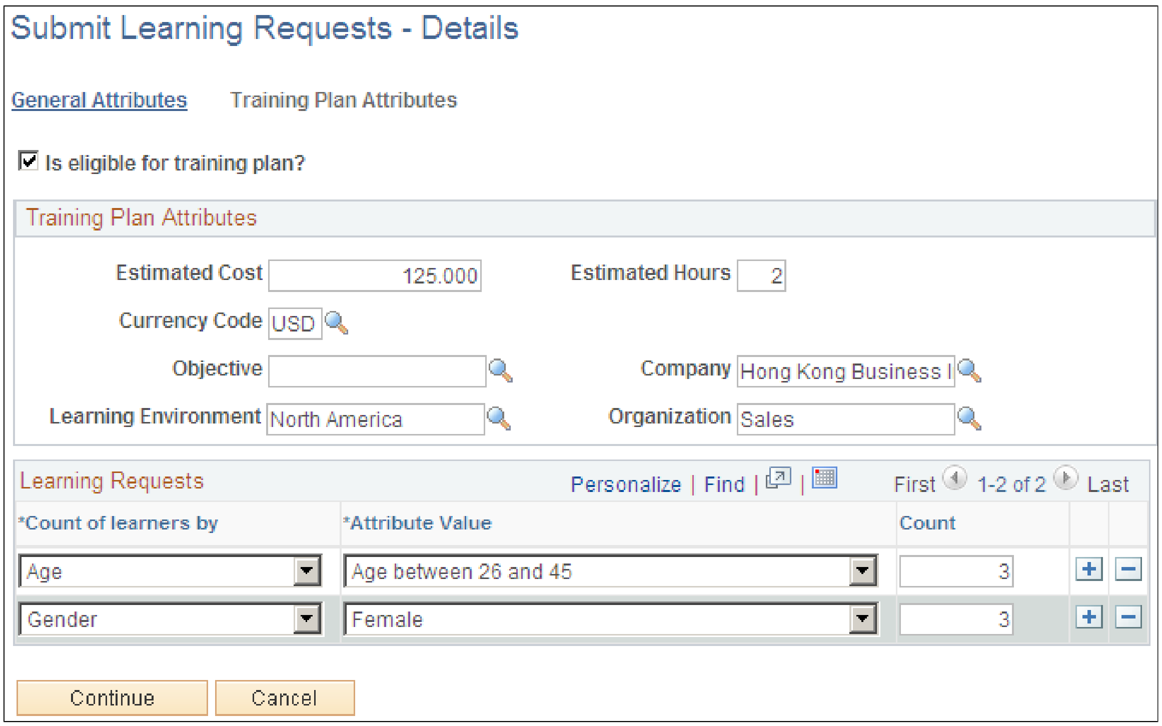
Submit Learning Requests - Details: Training Plan Attributes Page

Use the Submit Learning Requests - Details: Training Plan Attributes page (LM_ADM_NEW_LRQ_DTL) to enter information that is specific to training plans.

Navigation:

Click the Training Plan Attributes link on the Submit Learning Requests - Details: General Attributes page.

This example illustrates the fields and controls on the Submit Learning Requests - Details: Training Plan Attributes page.



The system refers to the information that you enter on this page when you generate training plans.

Note: Self-service users do not have access to these fields when submitting requests.

See Understanding Training Plans.

Field or Control	***Description***
Is eligible for training plan?	Select to include this learning request in training plans, when the request meets all other selection criteria for the training plan.
Estimated Cost	Enter the estimated (flat) class cost per student if this request is met. In the budget section of the Training Plan report, the system compares a department's estimated cost of meeting the demand for learning to the department's training budget.

Field or Control	***Description***
Estimated Hours	Enter the estimated number of hours for the requested learning.
Objective	Select a global objective to associate with the learning request. When you generate training plans, the report content is sorted by global objective.
Company	Select a company to associate with the learning request. When you generate training plans, you can include training requests for selected companies. The default value that appears in this field is based on the job title selected on the Submit Learning Requests - Details: General Attributes page.
Organization	Select the department to associate with the learning request. The default value that appears in this field is based on the job title selected on the Submit Learning Requests - Details: General Attributes page.
Learning Environment	Select a learning environment to associate with the learning request. When you generate training plans, you can include training requests for selected learning environments. The default value that appears in this field is based on the job title selected on the Submit Learning Requests - Details: General Attributes page.

(FRA) Learning Requests

The fields in this group box are French-specific. When the learning request is included in a training plan, and you select a number of seats rather than individual learners, the head counts that you enter here are used in the Training Budget Model and transferred to PeopleSoft HR for use in the 2483 report. When you name individual learners in the request, the system ignores information entered in these fields and refers to the selected learner records to determine the head counts.

Field or Control	***Description***
Count of learners by	Select the learning request criteria to which the learning request applies. Add a separate row for each criterion. The values that appear in this field reflect the criteria defined for the selected learning environment on the Learning Request Criteria page.
Attribute Value	Select the appropriate criteria attribute value. The values that appear in this field reflect the values defined for the selected learning environment on the Learning Request Criteria page.

Field or Control	Description
Count	Enter the number of learners that are associated with the selected criteria and attribute values.

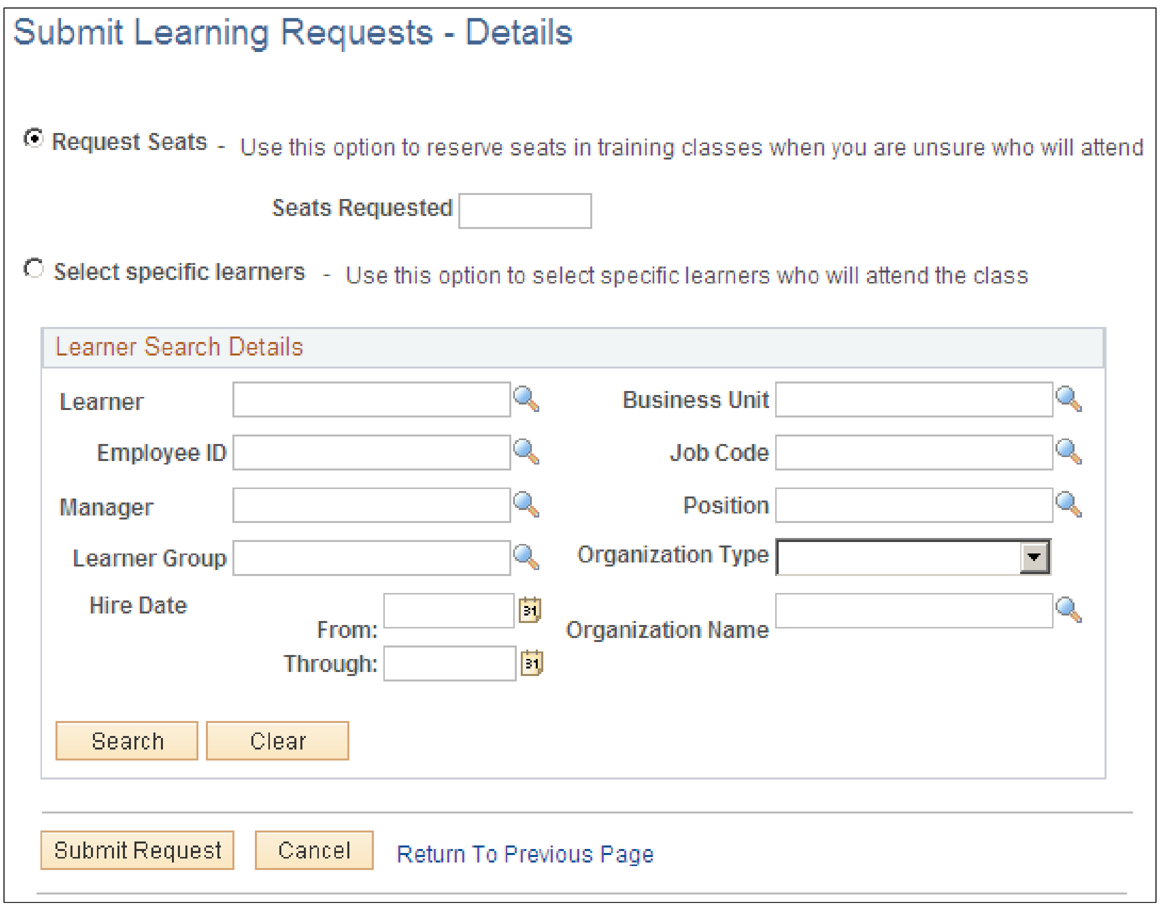
Submit Learning Requests - Details (seats) Page

Use the Submit Learning Requests - Details (seats) page (LM_ADM_LRQ_LRNRS) to specify the number of seats for a learning request or select the learners by name.

Navigation:

Click the Continue button on the Submit Learning Requests - Details: General Attributes page or the Submit Learning Requests - Details: Training Plan Attributes page.

This example illustrates the fields and controls on the Submit Learning Requests - Details (seats) page.



You can request a number of seats or select specific learners to associate with the request, but not both.

Managing Learning Requests

Pages Used to Manage Learning Requests

Page Name	***Definition Name***	***Usage***
Maintain Learning Requests - Current Learning Requests Page	LM_ADM_LRQ_SRCH	Manage current learning requests.
Maintain Learning Requests - Learning Request History Page	LM_ADM_LRQ_SRCH	Reviewing learning request history.
Maintain Learning Requests: General Page	LM_ADM_METHOD_DTLS	View the title, requester name, requested delivery method, and total learners for a request. Also, assign a class to a request and view the assigned class, begin the enrollment process, delete requests, and send notifications.
Maintain Learning Requests: Scheduled Page	LM_ADM_METHOD_DTLS	View the requested start dates, instructor name, special requests for a request. Also, assign a class to a request, begin the enrollment process, delete requests, and send notifications.
Maintain Learning Requests (assign class) Page	LM_ADM_ASGN_ACT_PG	Associate a class with a learning request.
Maintain Learning Requests: General Attributes Page	LM_ADM_LRQ_DTLS	Update general attributes for a learning request.
Maintain Learning Requests: Training Plan Attributes Page	LM_ADM_LRQ_DTLS	The fields on this page are similar to the fields on the Submit Learning Requests - Details: Training Plan Attributes page.
Maintain Learning Requests: Learners Page	LM_ADM_LRQ_DTLS	The fields on this page are similar to the fields on the Submit Learning Requests - Details (seats) page. (FRA) When French features are enabled for the user's learning environment, a learning classification can be associated with the request.

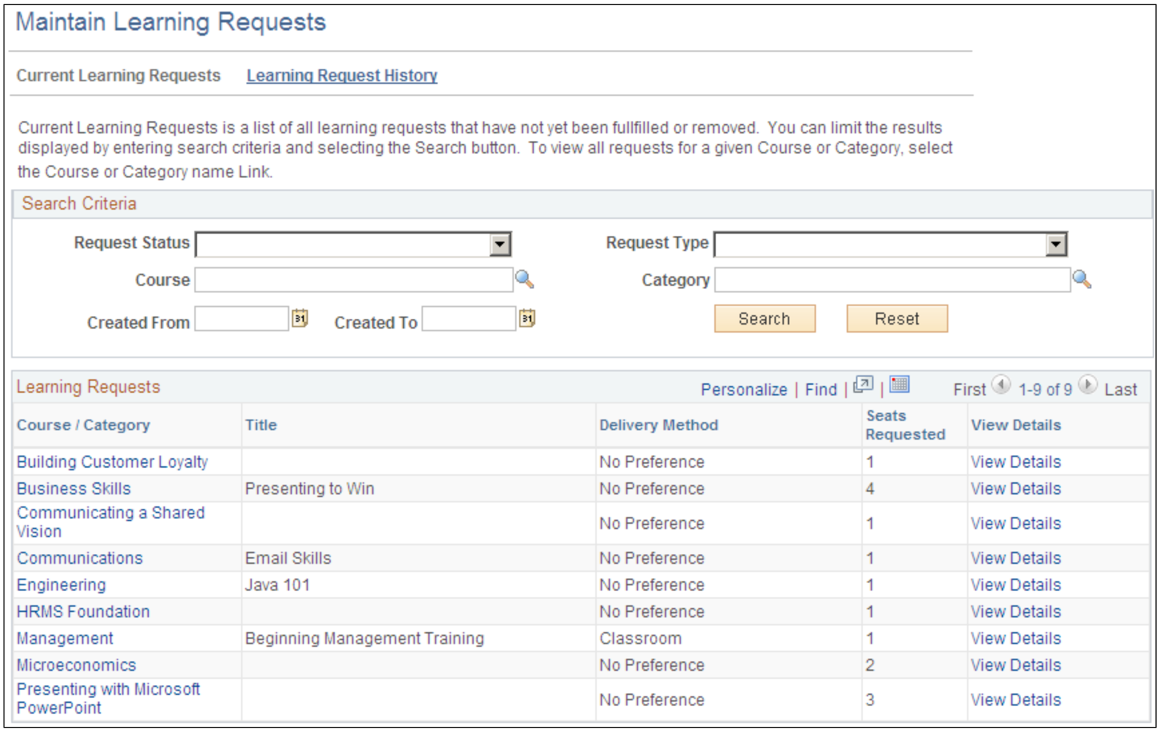
Maintain Learning Requests - Current Learning Requests Page

Use the Maintain Learning Requests - Current Learning Requests page (LM_ADM_LRQ_SRCH) to manage current learning requests.

Navigation:

Enterprise Learning > Learner Tasks > Maintain Learning Requests > Maintain Learning Requests

This example illustrates the fields and controls on the Maintain Learning Requests - Current Learning Requests page.



Administrators can use this page to manage current learning requests that have not yet been fulfilled or removed.

Search Criteria

Field or Control	***Description***
Request Status	Enter the status of the requests you want to search for. Values are: *Offered* and *Requested*.
Request Type	Enter the type of requests you want to search for. Values are: *Course* and *Category*.
Course	Enter a value here to search for learning requests associated with a specific course.
Category	Enter a value here to search for learning requests associated with a specific category.

Field or Control	***Description***
Created From and Created To	Enter values in these fields to search for learning requests that were created within a specific date range.

Learning Requests

When you click **Search,** this group box displays all of the current learning requests that meet the criteria you specified.

Field or Control	***Description***
Course/Category and View Details	Click a link in these columns to access the Maintain Learning Requests: General page for a learning request.

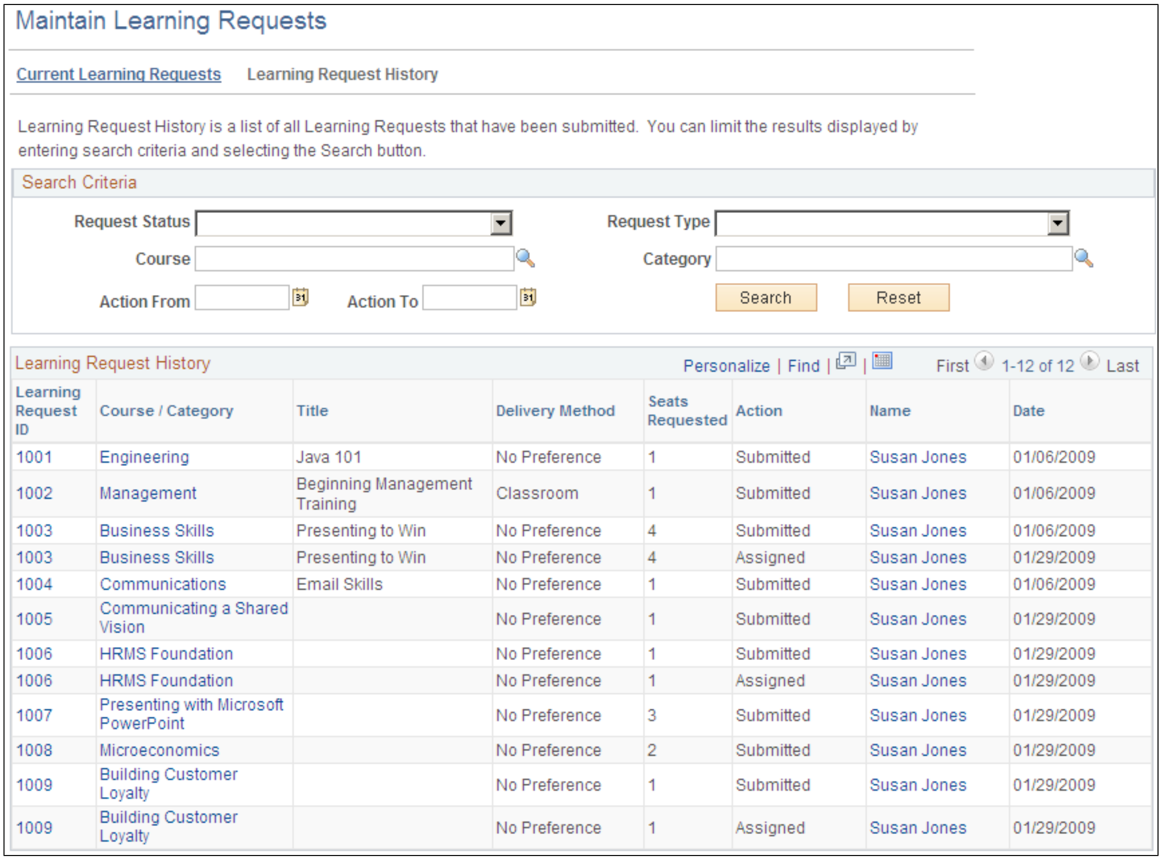
Maintain Learning Requests - Learning Request History Page

Use the Maintain Learning Requests - Learning Request History page (LM_ADM_LRQ_SRCH) to reviewing learning request history.

Navigation:

Click the **Learning Request History** link on the Maintain Learning Requests - Current Learning Requests page.

This example illustrates the fields and controls on the Maintain Learning Requests - Learning Request History page.



Maintain Learning Requests

Current Learning Requests   Learning Request History

Learning Request History is a list of all Learning Requests that have been submitted. You can limit the results displayed by entering search criteria and selecting the Search button.

Search Criteria

Request Status   Request Type

Course   Category

Action From   Action To   Search   Reset

Learning Request History   Personalize | Find | First 1-12 of 12 Last

Learning Request ID	Course / Category	Title	Delivery Method	Seats Requested	Action	Name	Date
1001	Engineering	Java 101	No Preference	1	Submitted	Susan Jones	01/06/2009
1002	Management	Beginning Management Training	Classroom	1	Submitted	Susan Jones	01/06/2009
1003	Business Skills	Presenting to Win	No Preference	4	Submitted	Susan Jones	01/06/2009
1003	Business Skills	Presenting to Win	No Preference	4	Assigned	Susan Jones	01/29/2009
1004	Communications	Email Skills	No Preference	1	Submitted	Susan Jones	01/06/2009
1005	Communicating a Shared Vision		No Preference	1	Submitted	Susan Jones	01/29/2009
1006	HRMS Foundation		No Preference	1	Submitted	Susan Jones	01/29/2009
1006	HRMS Foundation		No Preference	1	Assigned	Susan Jones	01/29/2009
1007	Presenting with Microsoft PowerPoint		No Preference	3	Submitted	Susan Jones	01/29/2009
1008	Microeconomics		No Preference	2	Submitted	Susan Jones	01/29/2009
1009	Building Customer Loyalty		No Preference	1	Submitted	Susan Jones	01/29/2009
1009	Building Customer Loyalty		No Preference	1	Assigned	Susan Jones	01/29/2009

Administrators can use this page to review learning request history, such as when a request was submitted and by whom.

Search Criteria

Field or Control	***Description***
Action From and Action To	Enter values in these fields to search for learning requests that were submitted or assigned within a specific date range.

Note: The remaining fields in the Search Criteria group box are identical to those on the Maintain Learning Requests - Current Learning Requests page.

Learning Request History

When you click **Search,** this group box displays all of the historical learning requests that meet the criteria you specified.

Field or Control	Description
Learning Request ID	Click a link in this column to access the Maintain Learning Requests: General Attributes page for a learning request.
Course/Category	Click a link in this column to access the Maintain Learning Requests: General page for a learning request.
Name	Click a link in this column to access the user profile associated with the learning request.

Maintain Learning Requests: General Page

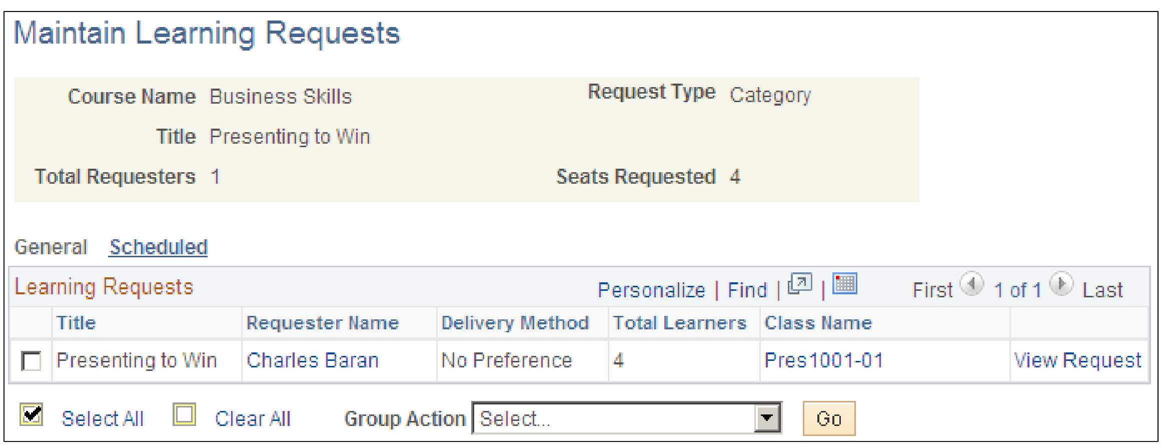
Use the Maintain Learning Requests: General page (LM_ADM_METHOD_DTLS) to view the title, requester name, requested delivery method, and total learners for a request.

Also, assign a class to a request and view the assigned class, begin the enrollment process, delete requests, and send notifications.

Navigation:

- Click the **View Details** link for a request on the Maintain Learning Requests - Current Learning Requests page.
- Click the **Course/Category** link on the Maintain Learning Requests - Current Learning Requests page.
- Click the **Course/Category** link on the Maintain Learning Requests - Learning Request History page.

This example illustrates the fields and controls on the Maintain Learning Requests: General page.



Field or Control	Description
Requester Name	Click to access the Learner Information page for the requester.

Field or Control	***Description***
View Request	Click to view or edit the learning request preferences.

Group Actions

Select the action to perform on the selected learning requests from the following and click Go.

<table>
<tr><th>Field or Control</th><th>Description</th></tr>
<tr><td>Group Action</td><td>

Assign Class. Associate a class with the learning request.

The system displays the Maintain Learning Request (assign class) page where you can select from a list of classes if the request identified a particular course; or you can search the catalog for an appropriate class if the request specified a category.

After you assign a class to the request, you can use a group action of Enroll Learners. If learners are named on the request, the status shown for the request on the self-service My Learning page is updated to Offered. The Maintain Learning Request: General page displays the name of the assigned class.

Note: It is the responsibility of the administrator to ensure that there are no conflicts or inconsistencies between learner groups assigned to the selected class and the learner groups associated with the learners.
Delete Requests. Remove the learning requests from the system.
Enroll Learners. Click to enroll learners in the class associated with the learning request. a class must be assigned to the request to select this action. When you click Go, the enrollment component (LM_CALL_ CENTER) appears so that you can enroll all or selected learners. When enrollment is confirmed, the system reduces the number of seats requested.
Send Notifications - Declined. Send a notification indicating the learning request has been declined.
Send Notifications - Exists. Send a notification indicating the requested learning already exists. Before selecting this action, be sure that a class is assigned to the request.
Send Notifications - New Offered. Send a notification indicating a new offering is available to fulfill the learning request. Before selecting this action, be sure that a class is assigned to the request.

</td></tr>
</table>

See Generating Notifications for Learning Requests.

See Learning Request Notifications.

Maintain Learning Requests: General Attributes Page

Use the Maintain Learning Requests: General Attributes page to (LM_ADM_LRQ_DTLS) to enter general attributes for a learning request.

Navigation:

- Click the View Request link on the Maintain Learning Requests: General page or the Maintain Learning Requests: Scheduled page.
- Click the Learning Request ID link on the Maintain Learning Requests - Learning Request History page.

The fields of this page are identical to those of the Submit Learning Requests - Details: General Attributes Page.

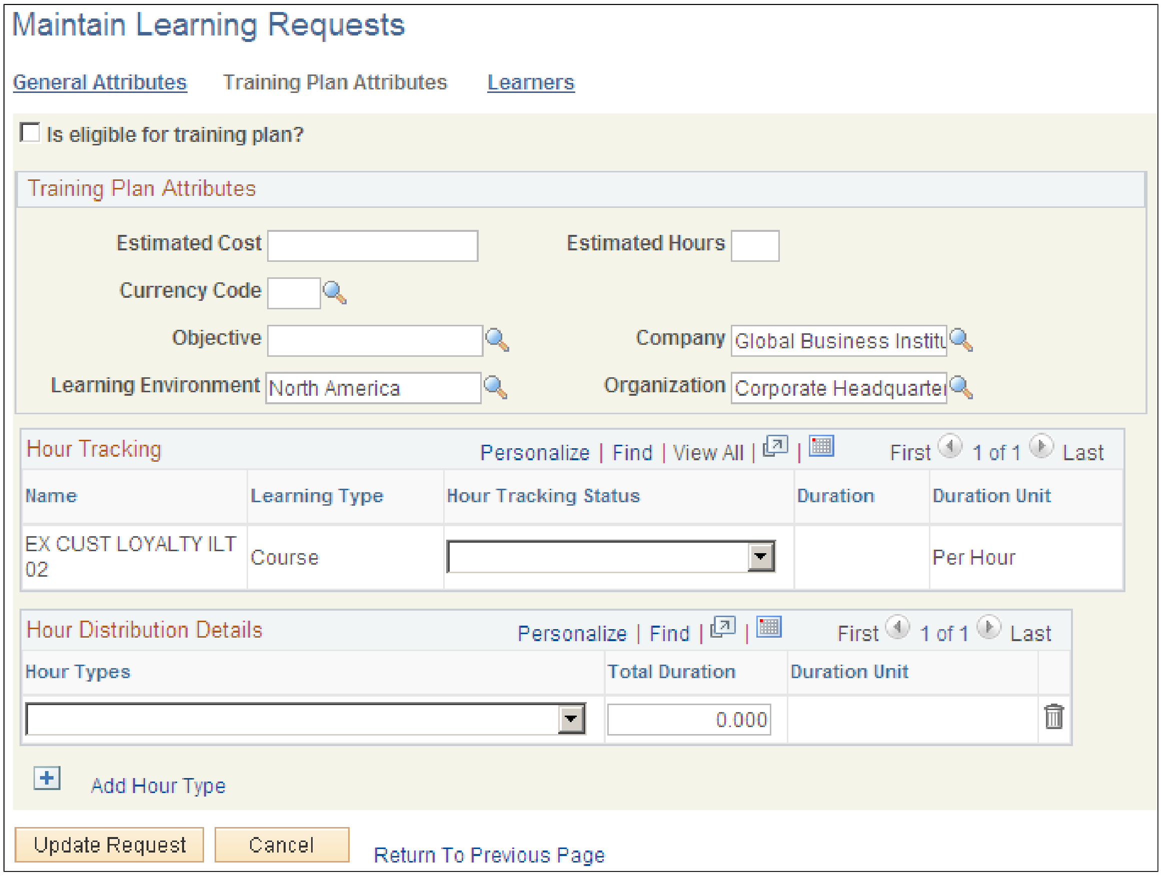
Maintain Learning Requests: Training Plan Attributes Page

Use the Maintain Learning Requests: Training Plan Attributes page (LM_ADM_LRQ_DTLS) to the fields on this page are similar to the fields on the Submit Learning Requests - Details: Training Plan Attributes page.

Navigation:

Click the Training Plan Attributes link on the Maintain Learning Requests: General Attributes

This example illustrates the fields and controls on the Maintain Learning Requests: Training Plan Attributes page.



Use this page to update training plan attributes for learning requests. This page is especially useful for entering training plan attributes for requests that were submitted by self-service users. The group boxes and fields that appear on this page are identical to those that appear on the Submit Learning Requests: Training Plan Attributes page with the following exceptions.

Hour Tracking

Select the Hour Tracking Status. Values are: *Pending Review from ELM Admin, Approved by ELM Administrator,* and *Cancelled*.

Hour Distribution Details

Use this group box to enter the types and number of hours for the learning request.

Field or Control	***Description***
Hour Types	Select an hour type for the learning request. The available values are defined on the Hour Types page.
Total Duration	Enter the number of hours for the corresponding hour type.

DIF (Droit Individuel à la Formation)

Select the **Apply Class toward DIF** check box to indicate that the requested learning applies to the learner's DIF. The DIF group box appears on this page only if the learning request is associated with an existing course that is eligible for DIF.

DIF Balance (Droit Individuel à la Formation balance)

This grid displays the learner's calculated DIF balance and DIF in advance.

(FRA) Learners in the List

This grid appears only when French features are enabled for the administrator's learning environment. The fields that appear here depend on whether a number of seats or learner names are included in the request:

- If a number of seats is requested, you can enter head counts by age, gender, training classification, and employee category.
- If learners are named in the request, you can select the learning classification only.

Maintain Learning Requests: Learners Page

Use the Maintain Learning Requests: Learners page (LM_ADM_LRQ_DTLS) to the fields on this page are similar to the fields on the Submit Learning Requests - Details (seats) page.

(FRA) When French features are enabled for the user's learning environment, a learning classification can be associated with the request.

Navigation:

Click the Learners link on the Maintain Learning Requests: General Attributes page.

This example illustrates the fields and controls on the Maintain Learning Requests: Learners page.

Note: This page is only accessible when learners are associated with the request. You can add or remove learners from the request.

Generating Notifications for Learning Requests

Pages Used to Generate Notifications for Learning Requests

Page Name	***Definition Name***	***Usage***
Learning Request Threshold Page	LM_LRQ_TRHLD_NOTIF	Run the LM_LRQ_TNOTF process to notify administrators of learning request thresholds that have been met.
Enrollment Notifications Page	LM_NOTIFY_RUNCTL	Run the LM_NOTIFY process to notify learners and managers when learning requests are declined, or when the requested learning exists or is newly offered. This process also generates enrollment notifications.

Understanding Learning Request Notifications

You can produce two types of email notifications for learning requests:

- Notifications to administrators when learning request thresholds are met.

  The Threshold Met notification is triggered when the learning request threshold defined for a course is reached. When you run the LM_LRQ_TNOTF process, launched through the Learning Request Threshold page, the system sends an email notification to the administrators of the course's primary learning environment.

- Notifications to learners and managers.

  The Class Already Exists, New Class Offered, and No Class Will Be Offered notifications are triggered when you use a group action (through the Maintain Learning Requests component) to notify learners and managers that the requested learning can be met by an existing class, through a newly offered class, or that the request is declined. When you run the LM_NOTIFY process, launched through the Enrollment Notifications page, the system sends the notifications to the learners associated with the request. (The LM_NOTIFY process also generates other enrollment notifications.)

Related Links

Sending Enrollment, Registration, and Waitlist Notifications

Learning Request Notifications

Chapter 26

Enrolling and Registering in Classes and Programs

Understanding Enrollment and Registration

This topic lists prerequisites and common elements, and discusses:

- Methods of enrollment and registration.
- Enrollment and registration features.
- Rules for dropping enrollments and registrations.
- Enrollment and registration statuses.

Related Links
Defining Class Details

Prerequisites

Before you can enroll learners in classes or register learners in programs, you must:

- Set up appropriate payment methods for internal departments and customer organizations.

  See Understanding Payment Method Setup.
- Define classes.

  See Understanding Management of Classes.
- Define certification and curriculum programs.

  See Understanding Programs.

Common Elements Used in This Topic

Field or Control	*Description*
 (Download)	Click the **Generate Spreadsheet** button to access Excel and have roster data entered into a spreadsheet.

Methods of Enrollment and Registration

Before learners can participate in a class or program, they must enroll in the class or register for the program. The term *enrollment* is used for classes and the term *registration* is used for programs. This distinction is important. Learners need only enroll in classes; they do not need to enroll in the individual learning components for that class. On the other hand, learners must first register for a program, and then enroll in and complete classes for that program to complete the program.

Enterprise Learning Management supports several methods of enrollment and registration:

- Individual learners can self-enroll and self-register.

  Learners can search the catalog for classes and programs and enroll in the classes and register for the programs directly. After learners register for programs, they can enroll in classes for those programs. Learners can also add classes to their learning plans and enroll in the planned classes later. If there's no enrollment cutoff date for a class, learners can enroll in the class at any time. However, planned classes are not visible in the employee self-service pages after the class end date is met. Learners can register for a program as long as the program has an active status.

- Managers can enroll and register direct reports.

  Managers cansearch the catalog for classes and programs in which to enroll and register any team member within the organizational hierarchy. Or, they can add classes to employees' learning plans and enroll the employees in the planned classes later. If there's no enrollment cutoff date for a class, managers can enroll learners in the class at any time. However, the class is not visible in the manager self-service pages after the class end date is met. Managers can register learners for a program as long as the program has an active status.

- Administrators can enroll and register individual learners and groups of learners.

  Administrators can enroll and register individual learners and small groups of learners through group enrollment and large groups of learners through mass enrollment. Administrators can enroll learners in classes regardless of enrollment cutoff dates.

Note: Learners are eligible to re-enroll in classes after receiving a status of Complete or Incomplete. The system creates a separate record for each enrollment.

Enrollment and Registration Features

Depending on how the system is set up, the following enrollment and registration features can apply:

- Approvals

  The system might require approval from a manager or administrator before it can confirm enrollment or registration. Administrators are the only individuals who can override approvals. Depending on your rules, administrator approval can be required for some forms of payment.

- Prerequisites

  Classes and programs might have prerequisites that learners must complete before they can enroll or register. Administrators are the only individuals who can override prerequisites.

- Waitlists

Classes can have a capacity limit. When the capacity limit is reached and the waitlist feature is enabled, the system can automatically create a waitlist. If an enrolled learner drops enrollment in the class, the system enrolls the first person on the waitlist automatically, as long as the class start date has not passed. The system does not enroll waitlisted learners automatically after the class start date. After the class start date, the administrator must manually enroll the learner by using the Maintain Class Roster component or move the learner to a new class or learning request through the Class Roster component. Administrators can also change a learner's position in a waitlist and increase the waitlist capacity.

There are no waitlists or registration limits for programs.

- Reserved seating

  Administrators can reserve seats for learners in classes when they anticipate participation of several learners but cannot identify them. Administrators are the only individuals who can reserve seats and fill the reserved seats.

  Programs do not use reserved seating.

- Payment methods

  Learners, managers, and administrators can select different payment methods during enrollment and registration depending on the system setup and the person that makes the enrollment or registration request.

  Note: The system does not prompt learners and managers to select a payment method during enrollment or registration if the class or program does not have an assigned price.

- Discounts

  Learners can receive discounts on all class, program, and drop currency fees if there is a discount set up for the department or customer organization to which the learner belongs. Discounts do not apply to class, program, or drop fees paid for using training units.

- Automated notifications

  Many enrollment and registration events generate an automated email notification to learners, managers, administrators, or owners of training unit pools and purchase orders, provided that you enable workflow. For example, learners can receive email when administrators approve their enrollment in classes or when registration in a program is pending approval. The system sends the emails by a batch process that runs at intervals that you specify.

  See Sending Enrollment, Registration, and Waitlist Notifications.

Rules for Dropping Enrollments and Registrations

Learners, managers, and administrators can drop a learner's enrollment in a class or registration in a program. However, learners cannot drop classes or programs if they were not the requesters during enrollment or registration. A learner can only drop classes and programs that he or she self-enrolls or self-registers in. When a learner drops a class or program, the system removes it from the learner's schedule.

Classes can have last drop dates. The system charges a drop fee, if one exists, only if a learner drops after the last drop date. You can set up last drop dates for classes as either a specific number of days before or after the class start date, on a specific date, or on the class start date. If you do not specify a last drop date, learners can drop the class up until the class start date. Administrators can always drop a learner's enrollment in a class, regardless of a class's last drop date or start date.

For example, say the drop cutoff date is January 12 and the class starts on January 15. If a learner drops the class on January 12, the system does not charge the learner the drop fee. If a learner drops the class from January 13 to January 14, the system charges the learner the drop fee. Only an administrator can drop the learner on or after January 15.

Note: When no drop rules are defined for a class, learners can drop it at any time, even after it has started.

There are no last drop dates for programs. A learner can drop registration in a program at any time. However, when a learner drops registration for a program, the system does not drop the learner from any class enrollments for the program. For example, say a learner registers for a program and then enrolls in one of the classes for the program. When the learner drops the program, the system does not drop the learner's enrollment in the class for the program. The system displays a warning message to the learner that explains to the learner that she or he must drop any related class enrollments for the program. A drop fee might apply for a program depending on whether you set up a drop fee for the program.

Administrators can modify the drop fees for learners on the class and program roster pages.

Enrollment and Registration Statuses

Each enrollment and registration goes through a series of enrollment or registration statuses—such as planned, pending approval, waitlisted, enrolled, in progress, and completed—as the enrollment or registration progresses. These statuses appear on several of the employee and manager self-service pages, and on the roster and grading pages that are available to administrators and instructors.

The statuses that apply to a particular enrollment or registration record and the conditions that trigger a status change can vary depending on the enrollment and registration options that you enable for the class or program and what type of learning components are in the class. For example, the status of a class with three self-paced learning components changes from enrolled to in progress when a learner launches the first learning component; the status of a class with only one session learning component remains enrolled until you mark attendance statuses or passing statuses for the learner.

Enrollment and registration statuses work in conjunction with completion statuses for learning components; a change to the completion status of a learning component can trigger a change in the enrollment status of a class or registration status of a program. Attendance and passing statuses affect the completion statuses of learning components. Together, these statuses help you track a learner's progress through a class or program.

Note: Several of the enrollment statuses can also be referred to as class completion statuses. These statuses include: enrolled, in progress, completed, and not completed.

See Understanding the Learning Component Completion EngineUnderstanding the Class Completion Engine.

Enrollment Statuses

This table lists and describes enrollment statuses for classes:

Enrollment Status	***Description***
Planned	The class is added to the learner's learning plan.
Pending approval	A request is made to enroll the learner in the class. The request must be approved before the system can enroll the learner in the class or add the learner to the class's waitlist.
Pending payment	A request is made to enroll a learner in a class and cash or check is used as the payment method during enrollment. Payment must be received before the administrator can enroll the learner in the class or add the learner to the class's waitlist. A seat is not held for the learner until payment is received. Administrators must manually update the enrollment status to enrolled after they receive payment. If no payment is ever received, the administrator must drop the class manually.
Waitlisted	The class for which an enrollment request is submitted is full. The system adds the learner to the waitlist. The system automatically sets this status upon enrollment if the class is full and the class has a waitlist enabled. Prerequisites must be met (if enforced) and approvals given before a learner can be added to a waitlist.
Enrolled	The system confirms the learner's enrollment in the class. Depending on the type of class, the learner can begin the class or wait for the first scheduled session.
In-Progress	This status implies that the learner has begun the class in some way. At least one learning component has a completion status of in progress, completed, or not completed.
Dropped	The learner's enrollment for the class is dropped. The class no longer appears in the learner's schedule.
Completed	Learner has successfully completed the class. This status is achieved when all required learning components for the class have a completed completion status. If any of the class's objectives have been assigned to the learner with a status of needed, completion of a class automatically updates the status of those objectives to met.

Enrollment Status	*Description*
Not completed	Learner has attempted the class but has not successfully completed it. This status is achieved when at least one required learning component has a not attempted, in progress, or not completed completion status by the class end date or by the end of the class's learning period.
Waived	Learner has completed supplemental learning that is equivalent to the class. When a class is waived, and any of the class's objectives were assigned to the learner with a status of needed, the system automatically updates the status of those objectives to met.

Registration Statuses

This table lists and describes registration statuses for programs:

Registration Status	*Description*
Pending approval	A request is made to register the learner in the program. A manager or administrator must approve the request—depending on the program setup—before the system can register the learner in the program.
Pending payment	A request is made to register a learner in a program, and cash or check is used as the payment method during registration. Payment must be received before the system can register the learner in the program. Administrators must manually update the registration status to registered when they receive payment. If no payment is ever received, the administrator must drop the program manually.
Registered	The system confirms the learner's registration in the program. The learner can begin the program.
In-Progress	This status implies that the learner has begun completion of the program in some way. Usually the learner has enrolled in, received a waiver for, or received historical credit for at least one course in the program.
Dropped	The learner's registration for the program is dropped.

Registration Status	*Description*
Completed	The learner has successfully completed the curriculum program or has successfully completed the certification program within the required time frame. This status is achieved when each required course and nested program has a status of completed or waived. If any of the program's objectives were assigned to the learner with a status of needed, completion of the program automatically updates the status of those objectives to met.
Expired	The recertification period has expired and the learner has not successfully completed all of the requirements for recertification. Administrators can also expire a learner's certification manually. **Note:** This status only applies to certification programs.
Not Completed	The learner has attempted the program but has not successfully completed it. The learner did not complete one or more required courses for a certification program within the required time frame. **Note:** This status only applies to certification programs. A curriculum program stays in the learner's current learning schedule until it is completed or dropped.
Planned	The program is added to the learner's learning plan.
Revoked	An administrator has manually revoked a learner's certification. **Note:** This status only applies to certification programs.
Reissue	An administrator has manually reissued a learner's expired or revoked certification. **Note:** This status only applies to certification programs.

Registration Status	*Description*
Waived	The learner has completed supplemental learning that is equivalent to the program, and a manager or administrator has waived the learner from having to complete it. If any of the program's objectives have been assigned to the learner with a status of needed, the system automatically updates the status to met. **Note:** A certification program that has been waived is still subject to the program's expiration rules.
Warning	This status can be set automatically or set manually by the administrator. The system sets this status when the learner reaches the recertification period for an expiring program or expiring section of the program. For example, if the certification period is one year and the recertification period is 90 days, the status changes to warning 90 days before the end of the year.

Managing Group Enrollment

Pages Used to Manage Group Enrollment

Page Name	*Definition Name*	*Usage*
Enroll Learners - Find Requester Page	LM_CALL_CENTER_REQ	Search for the individual who is making the enrollment request.
Enroll Learners - Search for Learning Page	LM_CALL_CTR_ACT	Search for and select a class or program for enrollment and registration.
Enroll Learners - Find Learners Page	LM_GRP_FND_LRNR	Find learners that the requester wants to enroll or register.
Enroll Learners - Select Learners Page	LM_GRP_SEL_LRNR	Select learners to enroll and register and use reserved seats. (FRA) Select a learning classification and specify whether to use DIF hours.
Enroll Learners - Payment Details Page	LM_ENRL_PAY_DTLS	Select a payment method, if applicable, and enter payment information.

Page Name	***Definition Name***	***Usage***
Enroll Learners - Review Enrollment Page	LM_GRP_PRO_LRNR	View the list of learners the system could not enroll or register.
Alert Details Page	LM_GRP_ALERT_DET	Review reasons why the system could not enroll or register a particular learner.
Enroll Learners - Enrollment Confirmation Page	LM_GRP_FIN_LRNR	Review a confirmation of the successful enrollments or registrations.

Understanding Group Enrollment

Group enrollment enables an administrator to enroll or register multiple learners into a class or program in one operation, as opposed to enrolling or registering one learner at a time and repeating the process for every learner. During group enrollment, the term *enrollment* is applicable to both classes and programs. It is implied that learners are *registered* for programs and *enrolled* in classes. For sake of simplicity, the group enrollment pages use the term *enroll.*

Note: If you select the Allow Enrollment in Multiple Learning Objects check box on the Install Defaults – General Page, administrators can enroll or register multiple learners into multiple classes, programs, or both.

To process a group enrollment, the administrator must:

1. Identify and select the *requester* who is submitting or authorizing the group enrollment.

   This is the person who is considered responsible for the payment of any fees.

   Note: This step is not applicable if the Default Requester option is selected for the administrator's learning environment. The system assumes that the administrator is the requester and hides the Enroll Learners - Find Requester page.

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2. Search for and select the class or program for which enrollment is requested.

   You can select from the classes or programs that are associated with a learner group to which the requester belongs.

   Note: If Allow Enrollment in Multiple Learning Objects is enabled, you can select multiple classes or programs during this step.

   ---

3. Search for learners based on criteria that the requester provides.
4. Select the final group of learners that the requester requires.
5. (FRA) Select a learning classification and specify whether to use DIF hours for the enrollment.
6. Review and update any payment details that apply to the group enrollment request.

   During group enrollment the system requires the administrator to select a payment method regardless of whether the class or program has a price. The payment methods that are available depend on whether the requester is an internal or external learner. Valid payment methods for internal requesters include chargebacks. Valid payment methods for external requesters include chargebacks, cash, checks, credit cards, training units, and purchase orders, depending on the setup of the customer organization to which the requester belongs.

7. Submit the group enrollment request.

8. Review the results to determine success or failure of individual enrollments.

   Note: The system automatically enrolls learners in the class or program, provided that they meet the other requirements for enrollment, if one of the following is true: the current user logged in or the requester is the learner's manager and the class or program requires manager approval, or the user logged in or the requester is the owner of the training unit pool or purchase order used to pay for the training and the class or program requires payment approval.

   ---

9. Resubmit specific learners' enrollments to override any alerts.

The number that you specify in the **Group Enroll Maximum** field on the Install Defaults - Enrollment page limits the number of learners that administrators can enroll through group enrollment. When an administrator attempts to enroll more learners than you specify in the **Group Enroll Maximum** field, the system prompts the administrator to switch to mass enrollment.

Note: Depending on your needs, using group enrollment for more than 20 or 30 learners can become time consuming and cumbersome. In such cases, you can use mass enrollment. Mass enrollment enables you to submit one request for a large number of learners, and you do not have to wait for the request to complete. You can check the results later.

Related Links

Managing Mass Enrollment

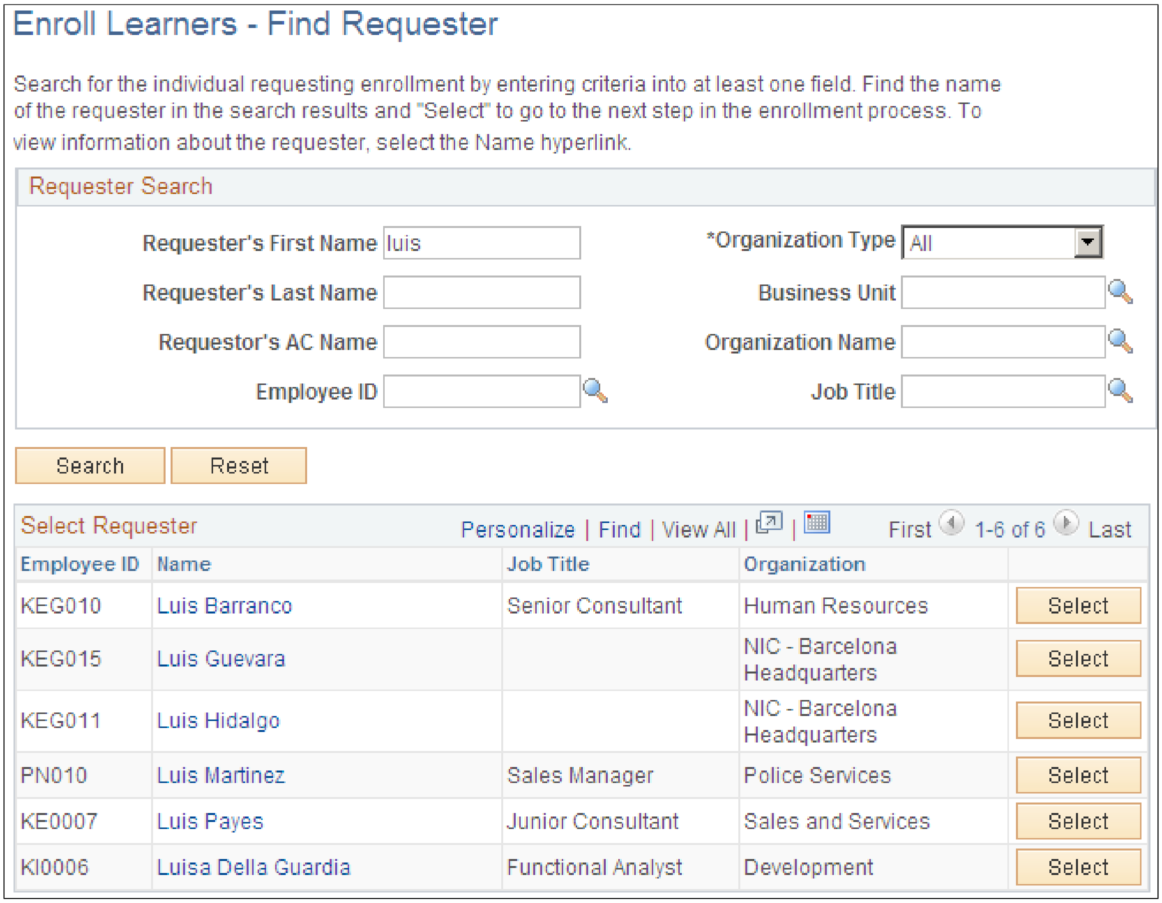
Enroll Learners - Find Requester Page

Use the Enroll Learners - Find Requester page (LM_CALL_CENTER_REQ) to search for the individual who is making the enrollment request.

Navigation:

Enterprise Learning > **Learner Tasks** > **Enroll Learners** > **Enroll Learners - Find Requester**

This example illustrates the fields and controls on the Enroll Learners - Find Requester page.



Requester Search

Use this group box to enter search criteria for a requester. Click **Search** to display the search results. Click **Reset** to clear the search criteria fields.

Note: This page does not appear if the Default Requester option is activated for the administrator's current learning environment.

Field or Control	***Description***
Requester's First Name and **Requester's Last Name**	Enter the full or partial first name or last name of the requester.
Requester's AC Name (Requester's alternate character name)	Enter the learner's name using alternate characters.

Field or Control	*Description*
Organization Type	Select an organization type. Values are: *All:* Includes departments and customer organizations. *Customer:* Customer organizations only. *Department:* Departments only.
Business Unit	Select a business unit. This field is active only if you select *Department* in the **Organization Type** field.
Organization Name	Select a department or customer organization. The system displays this field only if you select *All* in the **Organization Type** field.
Customer Name	Select a customer organization. The system displays this field only if you select *Customer* in the **Organization Type** field
Department Name	The system displays this field only if you select *Department* in the **Organization Type** field. Select a department. You can only select from departments that are associated with the selected business unit.

Select Requester

Select a requester from the list of search results. The system sorts by employee ID.

Field or Control	*Description*
Name	Click the requester's name link to access the Learner Information page, which displays high-level job and contact information about the requester.
Select	Click this button for a requester to display the Enroll Learners - Search for Learning page.

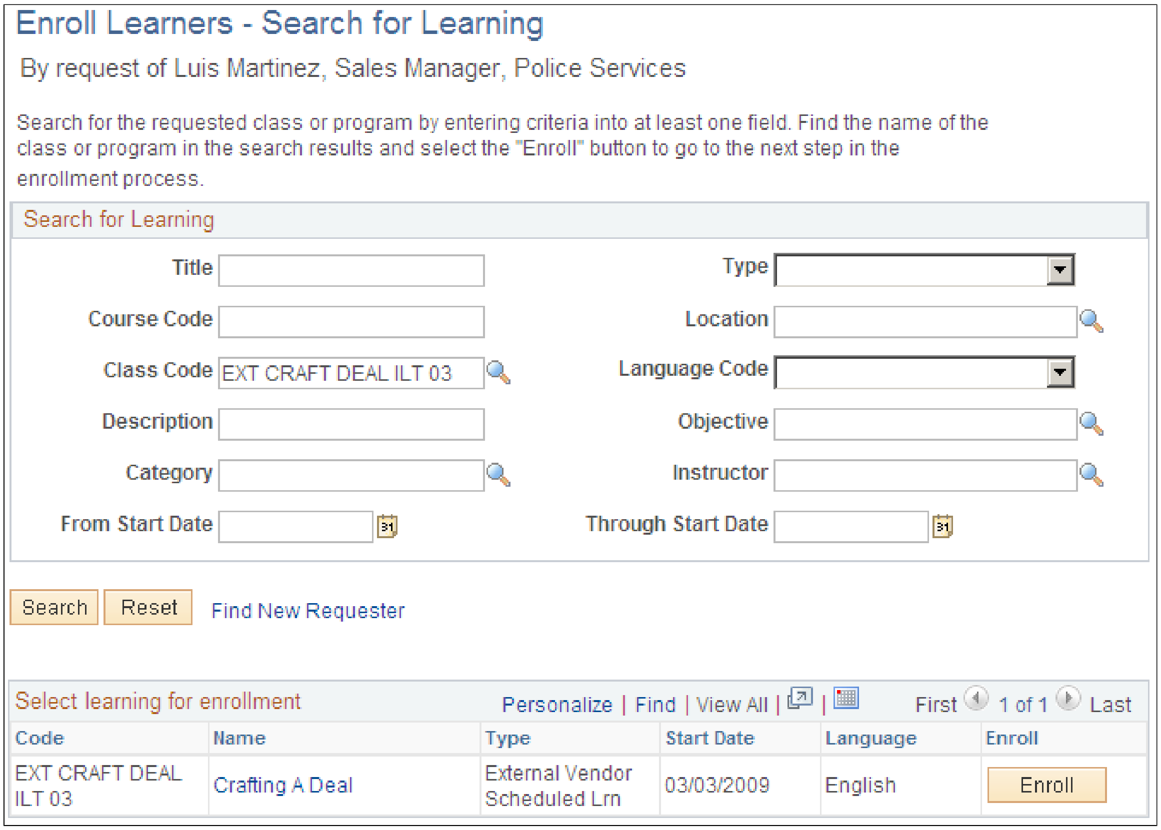
Enroll Learners - Search for Learning Page

Use the Enroll Learners - Search for Learning page (LM_CALL_CTR_ACT) to Search for and select a class or program for enrollment and registration.

Navigation:

Click the **Select** button next to a requester on the Enroll Learners - Find Requester page.

This example illustrates the fields and controls on the Enroll Learners - Search for Learning page.



Search for Learning

Use this group box to enter search criteria for a class or program. Select a delivery method type in the **Type** field. Click the **Search** button to display the search results. Click **Reset** to clear the search criteria fields.

Select Learning for Enrollment

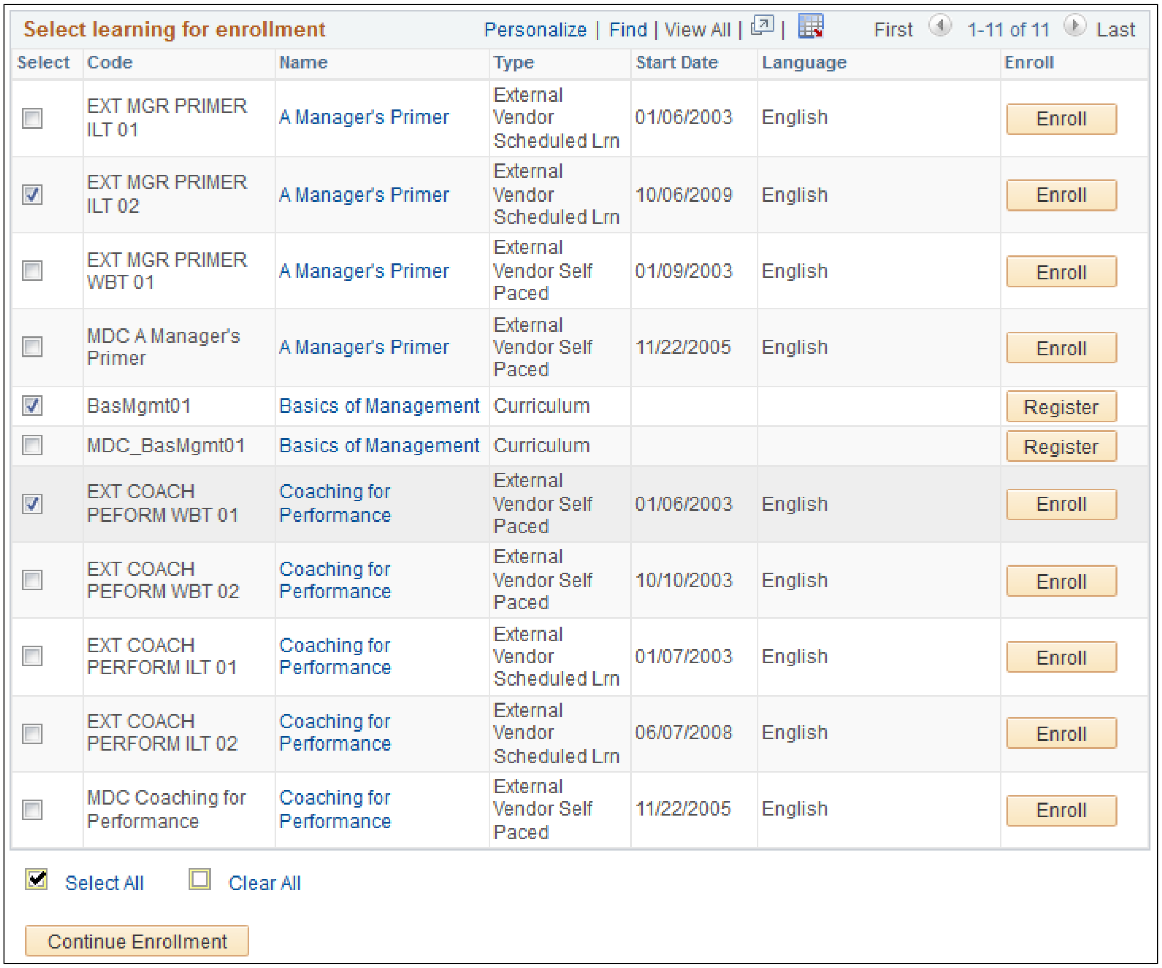
Select a class or program from the list of search results. Based on the search criteria, the results can include both classes and programs, including classes that are restricted to programs. The system sorts results by name and then code. The system displays only classes and programs that are associated with a learner group to which the requester belongs. Click the **Enroll** button for the class or Register button for a program to display the Enroll Learners - Find Learners page.

Field or Control	***Description***
Name	Click a class name to access the Class Details page, where you can view class details. Click a program name to access the Program Details page, where you can view program details.

Selecting Multiple Learning Items

If Allow Enrollment in Multiple Learning Objects is enabled on the Install Defaults – General Page, you can select multiple classes or programs on this page.

This is an example of how the Select learning for enrollment grid appears when Allow Enrollment in Multiple Objects is enabled.



Select learning for enrollment   Personalize | Find | View All | First 1-11 of 11 Last

Select	Code	Name	Type	Start Date	Language	Enroll
[ ]	EXT MGR PRIMER ILT 01	A Manager's Primer	External Vendor Scheduled Lrn	01/06/2003	English	Enroll
[x]	EXT MGR PRIMER ILT 02	A Manager's Primer	External Vendor Scheduled Lrn	10/06/2009	English	Enroll
[ ]	EXT MGR PRIMER WBT 01	A Manager's Primer	External Vendor Self Paced	01/09/2003	English	Enroll
[ ]	MDC A Manager's Primer	A Manager's Primer	External Vendor Self Paced	11/22/2005	English	Enroll
[x]	BasMgmt01	Basics of Management	Curriculum			Register
[ ]	MDC_BasMgmt01	Basics of Management	Curriculum			Register
[x]	EXT COACH PEFORM WBT 01	Coaching for Performance	External Vendor Self Paced	01/06/2003	English	Enroll
[ ]	EXT COACH PEFORM WBT 02	Coaching for Performance	External Vendor Self Paced	10/10/2003	English	Enroll
[ ]	EXT COACH PERFORM ILT 01	Coaching for Performance	External Vendor Scheduled Lrn	01/07/2003	English	Enroll
[ ]	EXT COACH PERFORM ILT 02	Coaching for Performance	External Vendor Scheduled Lrn	06/07/2008	English	Enroll
[ ]	MDC Coaching for Performance	Coaching for Performance	External Vendor Self Paced	11/22/2005	English	Enroll

Select All   Clear All

Continue Enrollment

Field or Control	*Description*
Continue Enrollment	Click to continue the enrollment or registration of the classes and programs you selected, by selecting learners on the Enroll Learners - Find Learners page.

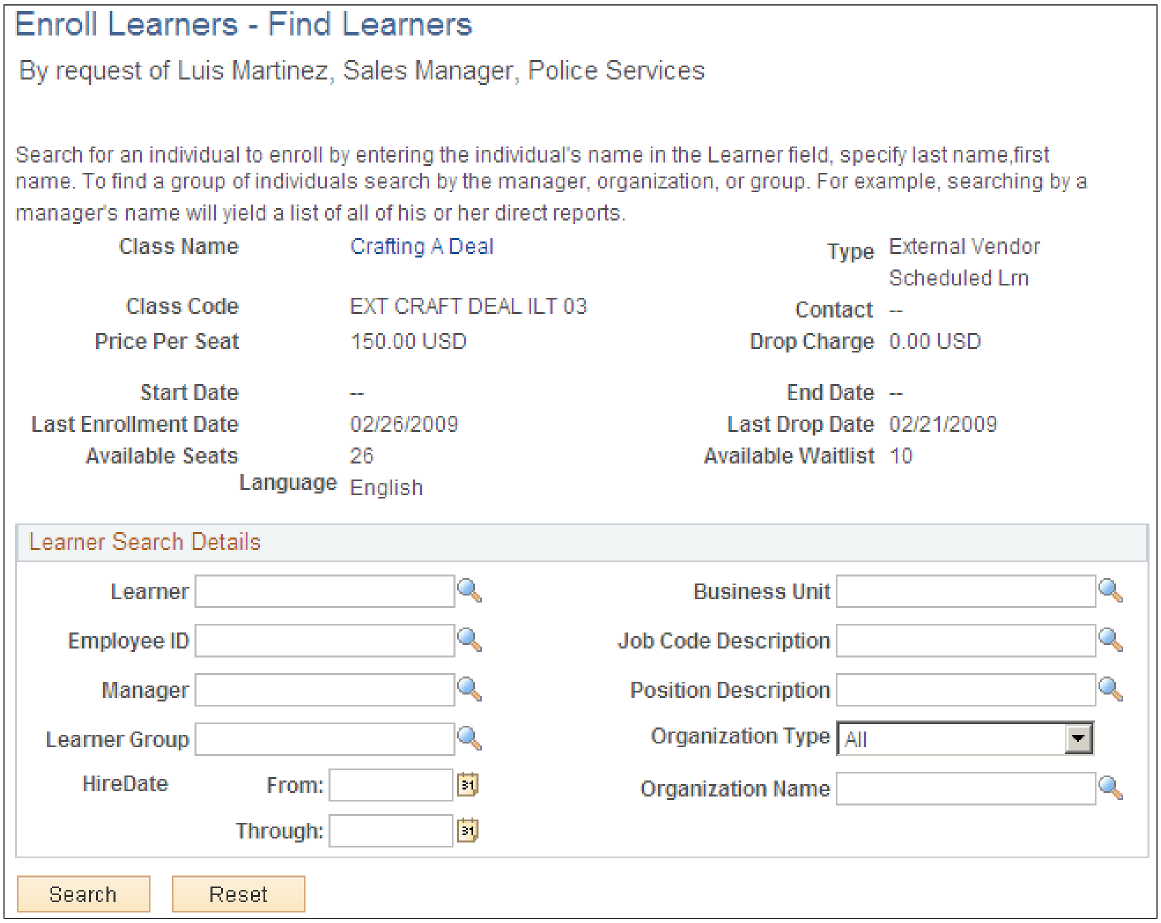
Enroll Learners - Find Learners Page

Use the Enroll Learners - Find Learners page (LM_GRP_FND_LRNR) to find learners that the requester wants to enroll or register.

Navigation:

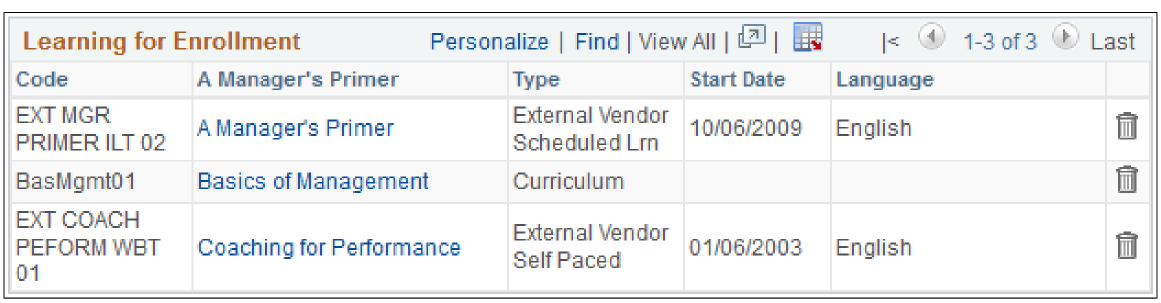
Click the **Enroll** button next to a class or the **Register** button next to a program on the Enroll Learners - Search for Learning page.

This example illustrates the fields and controls on the Enroll Learners - Find Learners page.



Learning for Enrollment

This example illustrates the Learning for Enrollment grid that appears on this page when Allow Enrollment in Multiple Objects is enabled.



This grid lists the classes and programs that you selected for enrollment. You can click the name of a class or program to access its associated Class Details or Program Details page. Click the **Delete** icon to remove a class or program from the enrollment process.

Learner Search Details

Use this group box to search for learners. Enter search criteria and click **Search** to display the search results on the Enroll Learners - Select Learners page. Click **Reset** to clear the search criteria fields.

Field or Control	***Description***
Learner	Enter a name to search for a specific learner.
Business Unit	Select a business unit to search for learners in a specific business unit.
Employee ID	Enter an employee ID to search for a specific learner.
Job Code Description	Select a job code to search for learners with a specific job code.
Manager	Select a manager to search for that manager's direct reports.
Position Description	Select a position to search for learners with a specific position.
Learner Group	Select a learner group to search for learners who belong to a specific group. **Note:** Only the learners groups that are associated with the same learning environment as the requester are available to select in this field.
Organization Type	Select an organization type if the requester is an internal learner. Values are: *All:* Includes departments and customer organizations. *Customer:* Customer organizations only. *Department:* Departments only. This field is inactive if the requester is an external learner.
Organization Name	Select a department or customer organization if the requester is an internal learner. This field is available only if you select *All* in the **Organization Type** field. If the requester is an external learner, this field is inactive and displays the customer organization to which the requester belongs.

Field or Control	***Description***
Customer Name	Select a customer organization. The system displays this field only if you select *Customer* in the **Organization Type** field.
Department Name	Select a department. The system displays this field only if you select *Department* in the **Organization Type** field.
Hire Date	Enter dates in the From and Through fields to search for learners with a specific hire date.

Enroll Learners - Select Learners Page

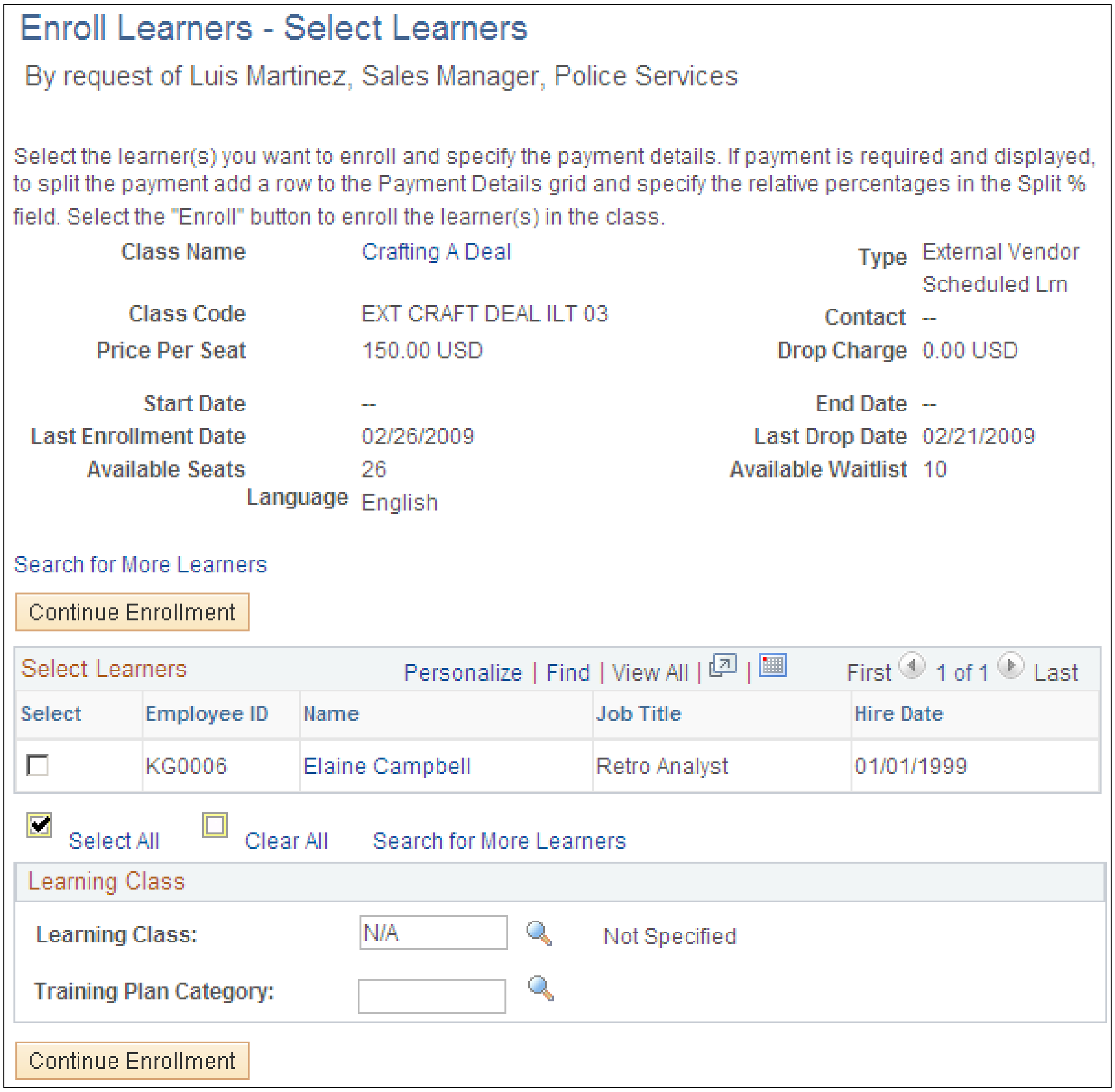
Use the Enroll Learners - Select Learners page (LM_GRP_SEL_LRNR) to select learners to enroll and register and use reserved seats.

(FRA) Select a learning classification and specify whether to use DIF hours.

Navigation:

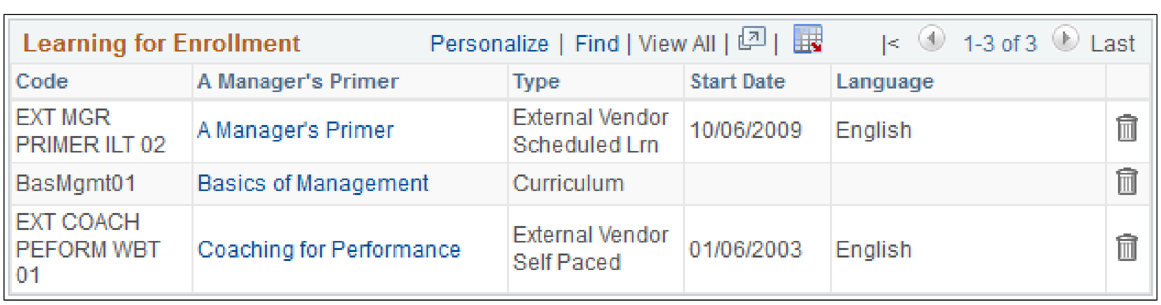
Enter search criteria and click the **Search** button on the Enroll Learners - Find Learners page.

This example illustrates the fields and controls on the Enroll Learners - Select Learners page.



Learning for Enrollment

This example illustrates the Learning for Enrollment grid that appears on this page when Allow Enrollment in Multiple Objects is enabled.



This grid lists the classes and programs that you selected for enrollment. You can click the name of a class or program to access its associated Class Details or Program Details page. Click the **Delete** icon to remove a class or program from the enrollment process.

Learner Search Details

This group box displays the search criteria that you enter on the Enroll Learners - Find Learners page.

Approval Required

Use this group box to override manager and administrator approvals. Define class approvals on the Class Details page. Define program approvals on the Maintain Programs - Details page.

Note: An administrator cannot override payment approvals here. The system does not display this group box if payment approval from a training unit pool owner or purchase order owner is the only approval type required. Training unit pool owners and purchase order owners can use the approvals page to approve the requests. Administrators can use roster component to approve payment approval requests.

Field or Control	***Description***
Approval Required	Displays whether the system requires manager or administrator approval to enroll in the class or register in the program.
Approve Enrollment Now	Select to override manager and administrator approvals for all learners.

Reserved Seats Allowed

Administrators can use reserved seats during class enrollment, provided that reserved seats have been defined for the class on the Class Details page. Once a reserved seat is filled, the seat does not revert to reserved status if a learner drops the class. Programs do not use reserved seating.

Note: The system hides the **Reserved Seats Allowed** group box if there are no available reserved seats.

Field or Control	***Description***
Reserved Seats Available	Displays the number of available reserved seats.
Use Reserved Seats	Enter the number of reserved seats that you want to use.

Select Learners

This grid displays all learners that met the search criteria on the Enroll Learners - Find Learners page. Select the check box for each learner whom you want to enroll, or click **Select All** to select all learners.

(FRA) DIF

This group box appears only when French features are enabled for the administrator's learning environment and DIF (Droit Individuel à la Formation) is enabled for the class (the Eligible for DIF check box is selected for the course). Select the Apply Class Toward DIF check box if the learner's DIF hours are to be used for this class.

(FRA) Learning Class

This group box appears only when French features are enabled for the administrator's learning environment. Define classifications on the Learning Classifications page.

Field or Control	*Description*
Learning Class	The system displays the default learning classification that is assigned to the course for this class. You can override the classification shown here.
Training Plan Category	Enter the training plan category that applies to this enrollment. Like learning classifications, training plan categories appear on training reports and can affect a learner's compensation for training time.

Additional Page Elements

Field or Control	*Description*
Search for More Learners	Click to access the Enroll Learners - Find Learners page, where you can refine the search for learners or enter new search criteria.
Continue Enrollment	After you select the learners to enroll, click to access the Enroll Learners - Payment Details page.

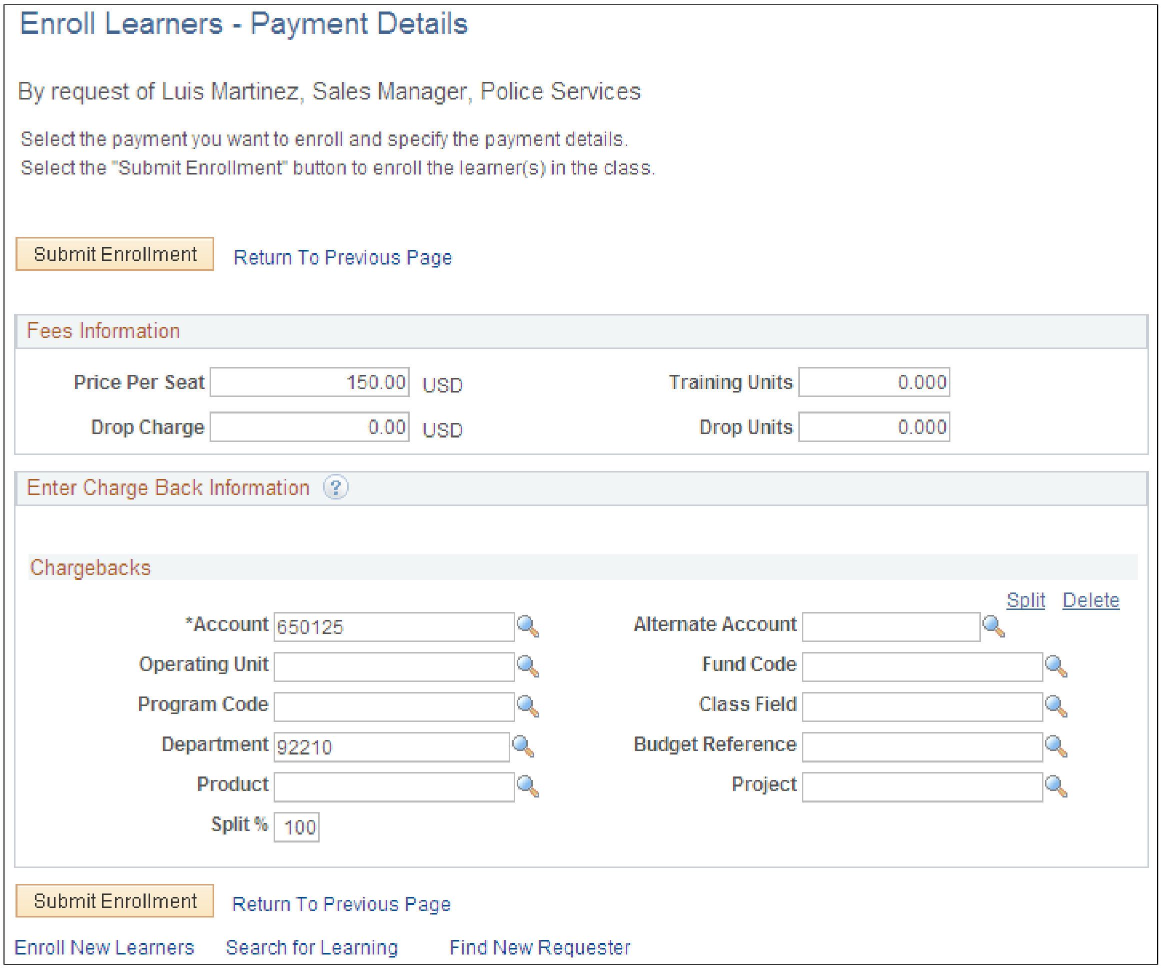
Enroll Learners - Payment Details Page

Use the Enroll Learners - Payment Details page (LM_ENRL_PAY_DTLS) to select a payment method, if applicable, and enter payment information.

Navigation:

Select the learners to enroll or register and click the **Continue Enrollment** button on the Enroll Learners - Select Learners page.

This example illustrates the fields and controls on the Enroll Learners - Payment Details page.



The system stores information for each successful class enrollment in the LM_ENRLMT table and each successful program registration in the LM_PRG_REG table. Additionally, the system stores payment information for each successful enrollment and registration in the Transaction table (LM_ENRLMT_PYMT).

See Add link to Transaction table information.

Fees Information

Use this group box to modify the class or program fees and drop charges for each learner. Fees and drop charges for classes appear by default from the Class Details page. Fees and drop charges for programs appear by default from the Maintain Programs - Details pages.

The system adjusts class and program currency prices and drop charges accordingly if there is a discount percentage set up for the department or customer organization to which the requester belongs. For example, if the class price is 500.00 USD, and the customer organization to which the requester belongs receives a 50 percent discount, the class price that the system displays is 250.00 USD. The system does not apply discounts to enrollment charges or drop charges if you pay using training units. Define discounts for departments on the Review Departments page. Define discounts for customer organizations on the Payment Information page.

The price for a program is separate from the price for classes within that program. A learner must pay to register for a program, then enroll in and pay for individual classes for that program. A learner does not have to pay for classes within a program that are waived or that he or she has received historical credit for.

Field or Control	***Description***
Price Per Seat	Enter a price for the class or program.
Drop Charge	Enter a drop charge for the class or program. The drop charge can be higher than the class price for all payment methods except training units and purchase orders. The system displays an error message when an administrator attempts to submit an enrollment or registration using training units or purchase order as the payment method and the drop charge is higher than the class or program price.
Training Units	Enter the number of training units that you want to charge each learner for the class or program.
Drop Units	Enter the number of training units that you want to charge each learner when they drop the class or program. The drop units must be less than or equal to the enrollment price in training units.

Learning for Enrollment

Allow Enrollment in Multiple Objects is enabled, this grid replaces the **Fees Information** group box on the page. It lists all of the learning items that you selected for enrollment along with their payment information.

This is an example of the Learning for Enrollment grid that appears on the Payment Details page when Allow Enrollment in Multiple Objects is enabled.

Learning for Enrollment — Personalize | Find | View All | |< 1-3 of 3 Last

Code	A Manager's Primer	Price Per Seat	Drop Charge	Currency Code	Training Units	Drop Units
EXT MGR PRIMER ILT 02	A Manager's Primer	150.00	0.00	USD	0.000	0.000
BasMgmt01	Basics of Management	500.00	100.00	USD	0.000	0.000
EXT COACH PEFORM WBT 01	Coaching for Performance	0.00	0.00	USD	0.000	0.000

Select Payment Method

Use this group box to select a payment method. The system only displays this group box if the requester is an external learner. The payment methods that you can select depend on the setup of the customer organization to which the requester belongs. Define payment methods for a customer organization on the Payment Information page. You can only select one payment method for all learners. The system does not allow partial payment by two different payment method types. You cannot change the payment method after the enrollment or registration is complete.

Field or Control	*Description*
Payment Method	Select a payment method. Values are: *Cash:* Select to pay with cash for the class or program fee. The system handles cash transactions for enrollments or registrations the same way as check transactions, except that you are not prompted to enter any additional information. *ChargeBack:* Select to pay with a chargeback. The **Enter Charge Back Information** group box appears. *Check:* Select to pay with a check. The **Enter Check Information** group box appears. *Credit Card:* Select to pay with a credit card. The **Enter Credit Card Information** group box appears. *Purchase Order:* Select to pay with a purchase order. The **Purchase Order** group box appears. *Training Units:* Select to pay with training units. The **Training Units** group box appears.

Enter Charge Back Information

Use this group box to enter charge back account information. The system displays this group box by default if the requester is an internal learner. If the requester is an external learner, it appears when you select *Charge Back* in the Payment Method field.

The ChartFields that the system displays depend on which ChartFields you select for use on the Chartfield Configuration page. If the requester is an internal learner, the ChartField values appear by default from the general ledger business unit that is mapped to the PeopleSoft HCM business unit to which the requester belongs. The requester's department is also included in the **Department** field. If the requester is an external learner, the ChartField values appear by default from the Profile Information page for the customer organization to which the requester belongs. You can modify the default ChartField values. The ChartField values that you can select for each ChartField are any values with an active status on the Chartfield Values page. The enrollment or registration records the payment method, ChartField values, and the transaction amount in the Transaction table.

Field or Control	*Description*
Split	Click to split the class or program charge between more than one account. The number values that you enter in the **Split %** (split percentage) fields must total 100.

Enter Check Information

For payments made by check, you must enter the check number, check issue date, bank, and routing number. The check expiration date is optional. The enrollment or registration status is set to pending payment for all learners until the check payment is received. The system does not enroll, waitlist (classes only), or register learners until the check payment is received. After payment is confirmed, administrators must manually update the learner's enrollment or registration status through the Administer Class Roster or Administer Program Rosters component. The enrollment or registration records the payment method, check information, revenue ChartFields, and the transaction amount in the Transaction table.

Enter Credit Card Information

Use this group box to enter credit card information. You can set up the credit card interface for CyberSource integration or manual processing on the Payment Methods page.

With CyberSource integration, you must enter a first and last name, credit card type, credit card number, expiration month and year, email address, and mailing address. When you click the **Submit Enrollment** button, the system attempts to connect to the CyberSource system to process the credit card. Each enrollment or registration is a separate credit card transaction. If you register five learners in a program, there are five credit card transactions. If the authorization succeeds and the credit card is successfully processed, the enrollment is successful; otherwise it fails. The credit card transaction does not occur if the system adds the learner to the class's waitlist. A learner is successfully enrolled or registered in the class or program if the credit card authorization goes through, even if the class or program requires manager or administrator approval.

With manual processing, there is no authorization of credit card information. The system ignores manager and administrator approvals. The system successfully enrolls or registers all learners, provided that they meet the other requirements of enrollment or registration. You must enter a first and last name, credit card number, and expiration month and year.

For CyberSource integration the enrollment or registration records the authorization number, enrollment confirmation number, the encrypted credit card number, revenue ChartFields, and the transaction amount in the Transaction table. For manual processing, the enrollment or registration records the enrollment confirmation number, and the encrypted credit card number in the Transaction table.

Note: For security reasons, only the last four digits of credit card numbers are shown on all other system pages.

Purchase Order

For payments made by purchase order, enter the purchase order number. The enrollment or registration records the purchase order number, the associated ChartField, currency, revenue ChartFields, and the transaction amount in the Transaction table.

The system deducts funds from the purchase order in cases where a learner's status is enrolled, registered, or pending approval. Funds are not deducted if the learner is waitlisted. If the learner has a pending approval status and upon approval is waitlisted, the system replenishes the funds into the purchase order. Essentially the system deducts funds from the purchase order for any status other than waitlisted.

If a manager, administrator, or purchase order owner denies approval for an enrollment request with pending approval status, the system reverses the purchase order deduction amount. The owner of the purchase order must approve the request on the approvals page. Managers must approve the request on the Maintain Approvals page. Administrators can approve requests on an approvals page or by using the Administer Class Roster or Administer Program Rosters components.

Field or Control	***Description***
PO Number	Enter a purchase order number. The purchase orders that you can enter are any purchase orders that are assigned to the requester. Assign purchase orders to a learner on the External Learners - Profile Info page. For example, a customer organization might have three purchase orders; PO1001, PO1002, and PO1003. However, if you only assign purchase orders PO1001 and PO1002 to the requester, then you cannot use PO1003 to pay for the enrollment. The purchase order number that you enter must have sufficient funds, the currency of the purchase order must match the currency of the class or program, and the purchase order expiration date must not be met; otherwise, the enrollment or registration is unsuccessful.

Training Units

Use this group box to enter training unit pool information. The enrollment records the training unit pool ID, the number of training units that is deducted, the total price calculated based on the purchase price of the training units and currency, the associated ChartField, currency, revenue ChartFields, and amount in the Transaction table.

The conditions for deducting funds from a training unit pool and approving the use of training units are similar to the conditions described for purchase orders.

Field or Control	***Description***
Training Unit Pool No	Select a training unit pool number. The list of training unit pools that you can select from are any training unit pools that are assigned to the requester. Assign training unit pools to a learner on the External Learners - Profile Info page. The training unit pool that you select must have sufficient funds, the currency of the training unit pool must match the currency of the class or program, and the training unit pool expiration date must not be met; otherwise, the enrollment or registration is unsuccessful.

Additional Page Elements

Field or Control	*Description*
Submit Enrollment	Click to submit the enrollment or registration. The system checks prerequisites, duplicate enrollments, and time conflicts and validates the payment information. If all learners are successfully enrolled or registered, the Enroll Learners - Enrollment Confirmation page appears; otherwise, the Enroll Learners - Review Enrollment page appears. The system generates an email that gets queued to be sent to the learner informing the learner of his or her new enrollment or registration status. The system also generates email notifications that are to be sent to the appropriate managers, training unit pool owners, and purchase order owners, if approval is required for a learner to be enrolled or registered successfully. See Enrollment Workflow Notifications. See Curricula and Certification Workflow Notifications.

Related Links

Understanding Payment Method Setup

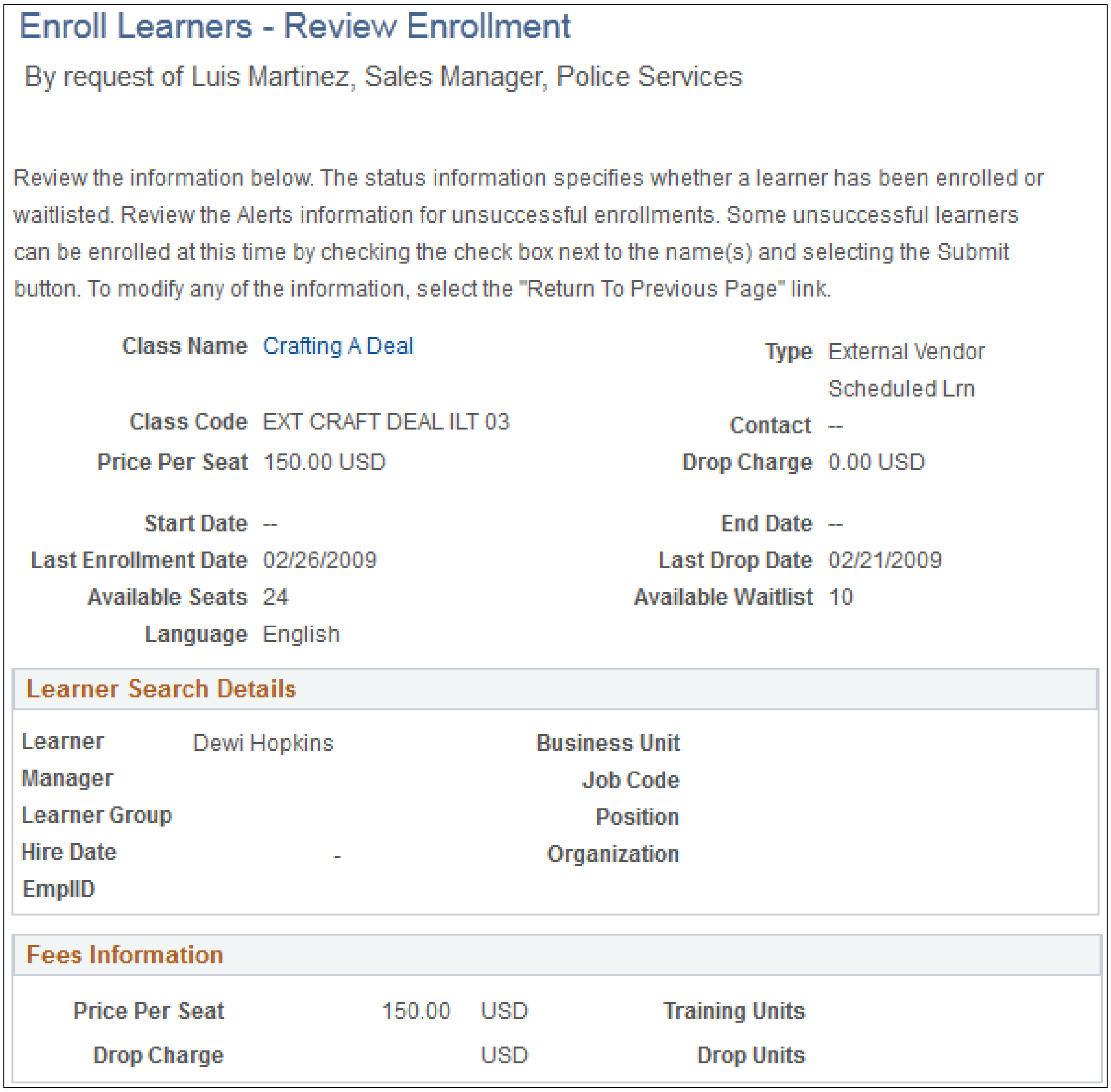
Enroll Learners - Review Enrollment Page

Use the Enroll Learners - Review Enrollment page (LM_GRP_PRO_LRNR) to view the list of learners the system could not enroll or register.

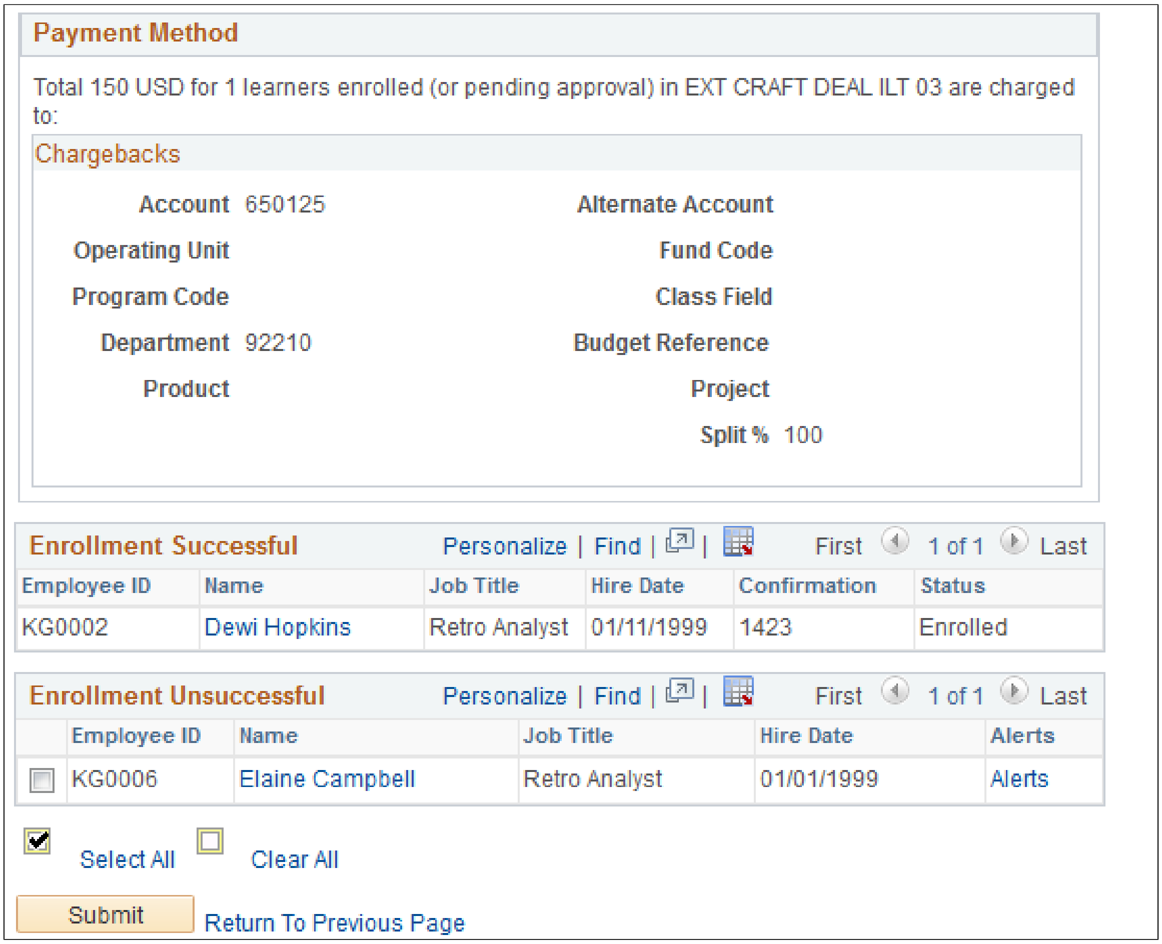
Navigation:

Click the **Submit Enrollment** button on the Enroll Learners - Payment Details page.

This example illustrates the fields and controls on the Enroll Learners - Review Enrollment page (1 of 2).



This example illustrates the fields and controls on the Enroll Learners - Review Enrollment page (2 of 2).



Field or Control	***Description***
Class Name or **Program Name**	Click this link to access the roster for the class or program. See Class Roster Page. See View Certification Roster Page

Learning for Enrollment

If Allow Enrollment in Multiple Objects is enabled, this grid appears on the page. It lists all of the learning items that you selected for enrollment.

This is an example of the Learning for Enrollment grid that appears on the Enroll Learners - Review Enrollment page when Allow Enrollment in Multiple Objects is enabled.

Learning for Enrollment Personalize | Find | View All | |< 1-3 of 3 Last

Code	A Manager's Primer	Type	Start Date	Language
EXT MGR PRIMER ILT 01	A Manager's Primer	External Vendor Scheduled Lrn	01/06/2003	English
BasMgmt01	Basics of Management	Curriculum		
EXT COACH PEFORM WBT 01	Coaching for Performance	External Vendor Self Paced	01/06/2003	English

Fees Information

This group box displays the class or program price and drop charge for each learner, if any exist.

Field or Control	*Description*
Price Per Seat	Displays the class or program price for each learner.
Drop Charge	Displays the class or program drop charge for each learner.

Payment Method

This group box displays the payment information that you enter during enrollment or registration on the Enroll Learners - Payment Details page. It also displays the total amount of the enrollment or registration.

Approval Required

This group box displays whether the enrollment requires approval, based on the approval type selected on the Class Details page or the Maintain Programs - Detail page.

Reserved Seats Allowed

This group box is displayed if there are any reserved seats available for class enrollments. Enter the number of reserved seats that you want to use, if applicable.

Enrollment Successful

This group box displays all learners for whom enrollment or registration is successful. Successful enrollments include learners with enrolled, registered, waitlisted (classes only), pending payment, or pending approval statuses.

Field or Control	*Description*
Confirmation	Displays the confirmation number for the learner. The system uses this number to track the enrollment history and to determine the learner's priority in a waitlist.

Field or Control	***Description***
Status	Displays the enrollment or registration status for each learner.

Enrollment Unsuccessful

This group box displays all learners for which enrollment or registration was unsuccessful. Click the **Alerts** link for each learner to see the error conditions that caused the enrollment to fail. To override conditions that are preventing enrollment or registration, select the check box for the learner and click the **Submit** button on this page. The system ignores the condition that is preventing enrollment or registration and attempts to confirm the enrollment. An administrator cannot override an unsuccessful enrollment in the following cases; a class and its waitlist are full, a duplicate enrollment or registration is detected, there are insufficient funds in a training unit pool or purchase order, the training unit pool or purchase order is expired, or when the currency for a training unit pool or purchase order doesn't match the class or program currency.

Field or Control	***Description***
Alerts	Click to access the Alert Details page, where you can view the condition that is preventing enrollment or registration for a learner.

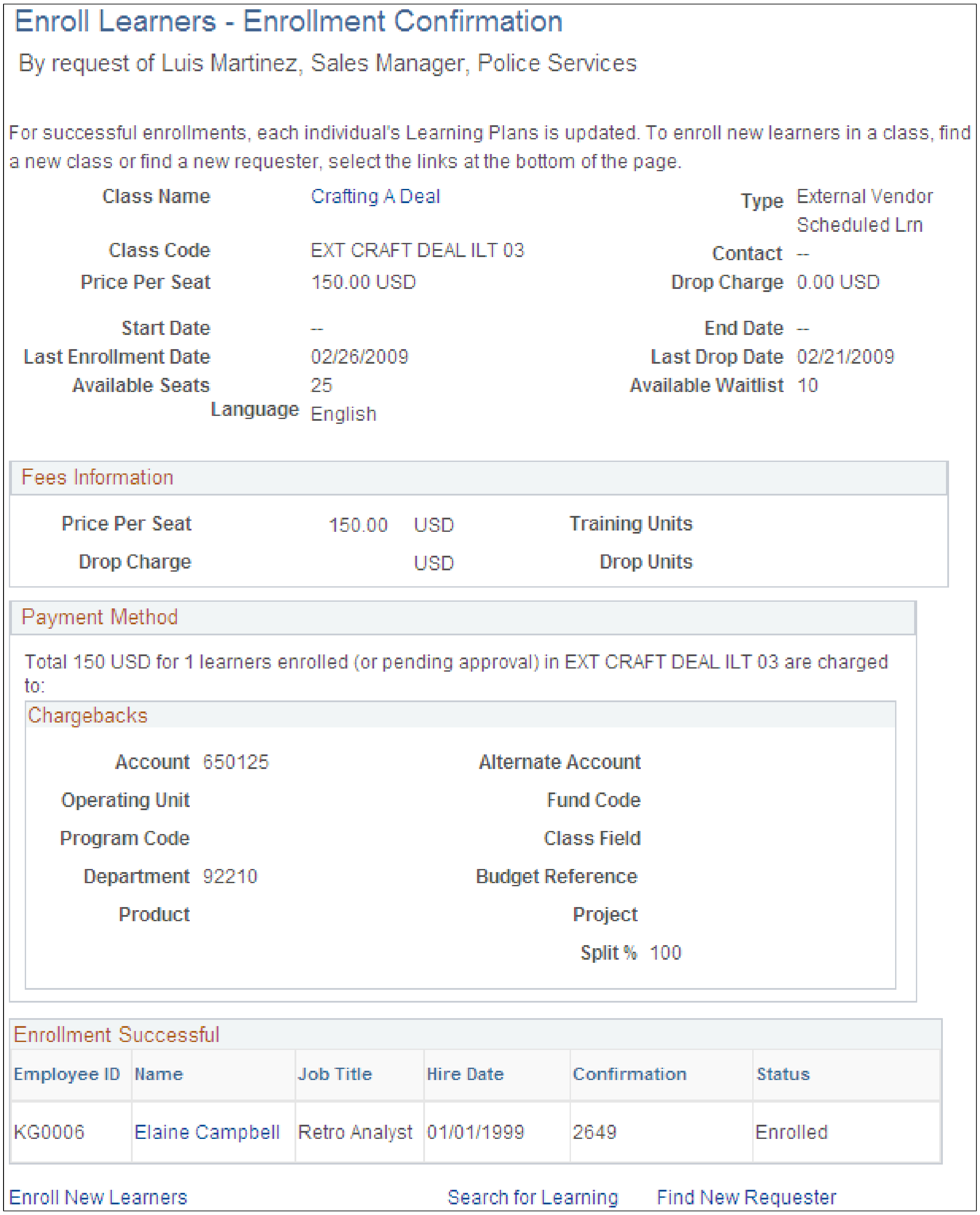
Enroll Learners - Enrollment Confirmation Page

Use the Enroll Learners - Enrollment Confirmation page (LM_GRP_FIN_LRNR) to review a confirmation of the successful enrollments or registrations.

Navigation:

- Click the Submit Enrollment button on the Enroll Learners - Payment Details page.
- Click the Submit button on the Enroll Learners - Review Enrollment page.

This example illustrates the fields and controls on the Enroll Learners - Review Enrollment page.



Enroll Learners - Enrollment Confirmation

By request of Luis Martinez, Sales Manager, Police Services

For successful enrollments, each individual's Learning Plans is updated. To enroll new learners in a class, find a new class or find a new requester, select the links at the bottom of the page.

Class Name	Crafting A Deal	Type	External Vendor Scheduled Lrn
Class Code	EXT CRAFT DEAL ILT 03	Contact	--
Price Per Seat	150.00 USD	Drop Charge	0.00 USD
Start Date	--	End Date	--
Last Enrollment Date	02/26/2009	Last Drop Date	02/21/2009
Available Seats	25	Available Waitlist	10
Language	English		

Fees Information

Price Per Seat	150.00	USD	Training Units	
Drop Charge		USD	Drop Units	

Payment Method

Total 150 USD for 1 learners enrolled (or pending approval) in EXT CRAFT DEAL ILT 03 are charged to:

Chargebacks

Account	650125	Alternate Account	
Operating Unit		Fund Code	
Program Code		Class Field	
Department	92210	Budget Reference	
Product		Project	
		Split %	100

Enrollment Successful

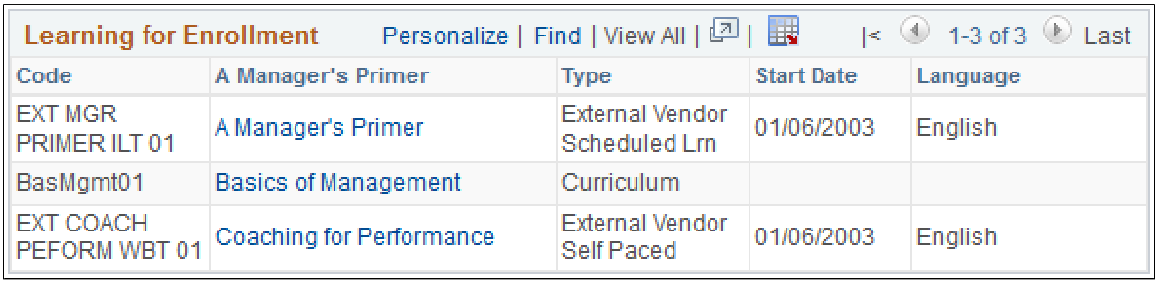
Employee ID	Name	Job Title	Hire Date	Confirmation	Status
KG0006	Elaine Campbell	Retro Analyst	01/01/1999	2649	Enrolled

Enroll New Learners Search for Learning Find New Requester

Learning for Enrollment

If Allow Enrollment in Multiple Objects is enabled, this grid appears on the page. It lists all of the learning items that you selected for enrollment.

This is an example of the Learning for Enrollment grid that appears on the Enroll Learners - Enrollment Confirmation page when Allow Enrollment in Multiple Objects is enabled.



Learning for Enrollment Personalize | Find | View All | |< 1-3 of 3 Last

Code	A Manager's Primer	Type	Start Date	Language
EXT MGR PRIMER ILT 01	A Manager's Primer	External Vendor Scheduled Lrn	01/06/2003	English
BasMgmt01	Basics of Management	Curriculum		
EXT COACH PEFORM WBT 01	Coaching for Performance	External Vendor Self Paced	01/06/2003	English

Managing Mass Enrollment

Pages Used to Manage Mass Enrollment

Page Name	***Definition Name***	***Usage***
Group Enrollment - Warning Page	LM_ENRL_WARNING	Schedule a mass enrollment request.
Enroll Learners - Mass Enrollment Page	LM_MASS_SEL_LRNR	Verify selection criteria for the learners whom you want to enroll and specify mass enrollment options such as enrollment overrides and notifications.
Enroll Learners - Payment Details Page	LM_ENRL_PAY_DTLS	Enter payment information.
Review Mass Enrollment Requests Page	LM_MASS_RQST_DET	Review mass enrollment requests, delete pending requests, and view reports for processed requests.
Process Mass Enrollment Page	LM_MASS_ENRL_RNCTL	Process mass enrollment requests.

Understanding Mass Enrollment

Using group enrollment for more than 20 or 30 learners can be cumbersome. Mass enrollment provides an efficient method of handling large volume enrollments. You can submit one request for a large number of learners, and you do not have to wait for the request to complete. You can check the results later.

The system triggers the mass enrollment option during a group enrollment when an administrator attempts to enroll or register more learners than the number specified in the **Group Enroll Maximum** field on the Install Defaults - Enrollment page. In this case, the system prompts the administrator to submit a mass enrollment request or to return to the Enroll Learners - Find Learners page to narrow the search results.

Note: (FRA) When you enter a mass enrollment request, you cannot associate a learning classification with the enrollment records or specify the use of DIF hours for the enrollments. You can add this information to the enrollment records later through the Administer Class Roster component.

To process a mass enrollment, the administrator, must:

1. Select to schedule a mass enrollment request when prompted during group enrollment.

2. Select mass enrollment overrides and notification options.

3. Review and update any payment details that apply to the mass enrollment request.

   Unlike group enrollment, the only valid payment method for mass enrollment is chargeback. Therefore, if the requester is an external learner, you must enable chargeback as a payment method on the Payment Information page for the requester's organization. By default, the system uses the requester's department, but there is an option to charge back each individual learner's department.

4. Submit the mass enrollment request.

5. Process the mass enrollment request to enroll or register the learners in the class or program.

6. Review the results to determine success or failure of individual enrollments.

Prerequisites

Before using the mass enrollment process, be sure that the appropriate value has been set for the commit frequency.

See Defining the Batch Processing Commit Frequency.

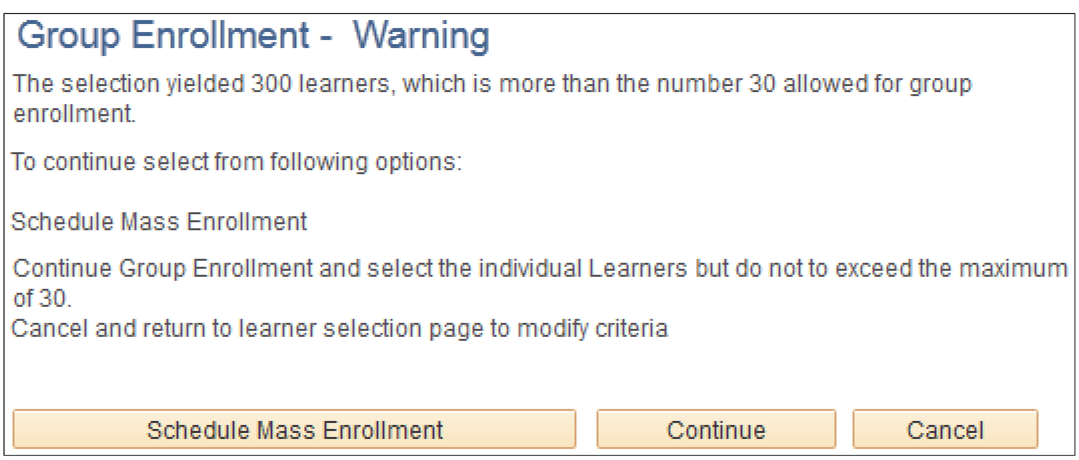
Group Enrollment - Warning Page

Use the Group Enrollment - Warning page (LM_ENRL_WARNING) to schedule a mass enrollment request.

Navigation:

Click the **Continue** button on the Enroll Learners - Find Learners page.

This example illustrates the fields and controls on the Group Enrollment - Warning page.



Field or Control	*Description*
Schedule Mass Enrollment	Click to create a mass enrollment request. This includes all learners who match the search criteria.
Continue	Click to continue group enrollment. The system displays the Enroll Learners - Select Learners page. The system displays only the number of users that you specify in the **Group Enroll Maximum** field. If the **Group Enroll Maximum** field limits you to five learners, the system displays only the first five learners that meet the search criteria on the Enroll Learners - Select Learners page.
Cancel	Click to return to the Enroll Learners - Find Learners page, where you can modify the search criteria.

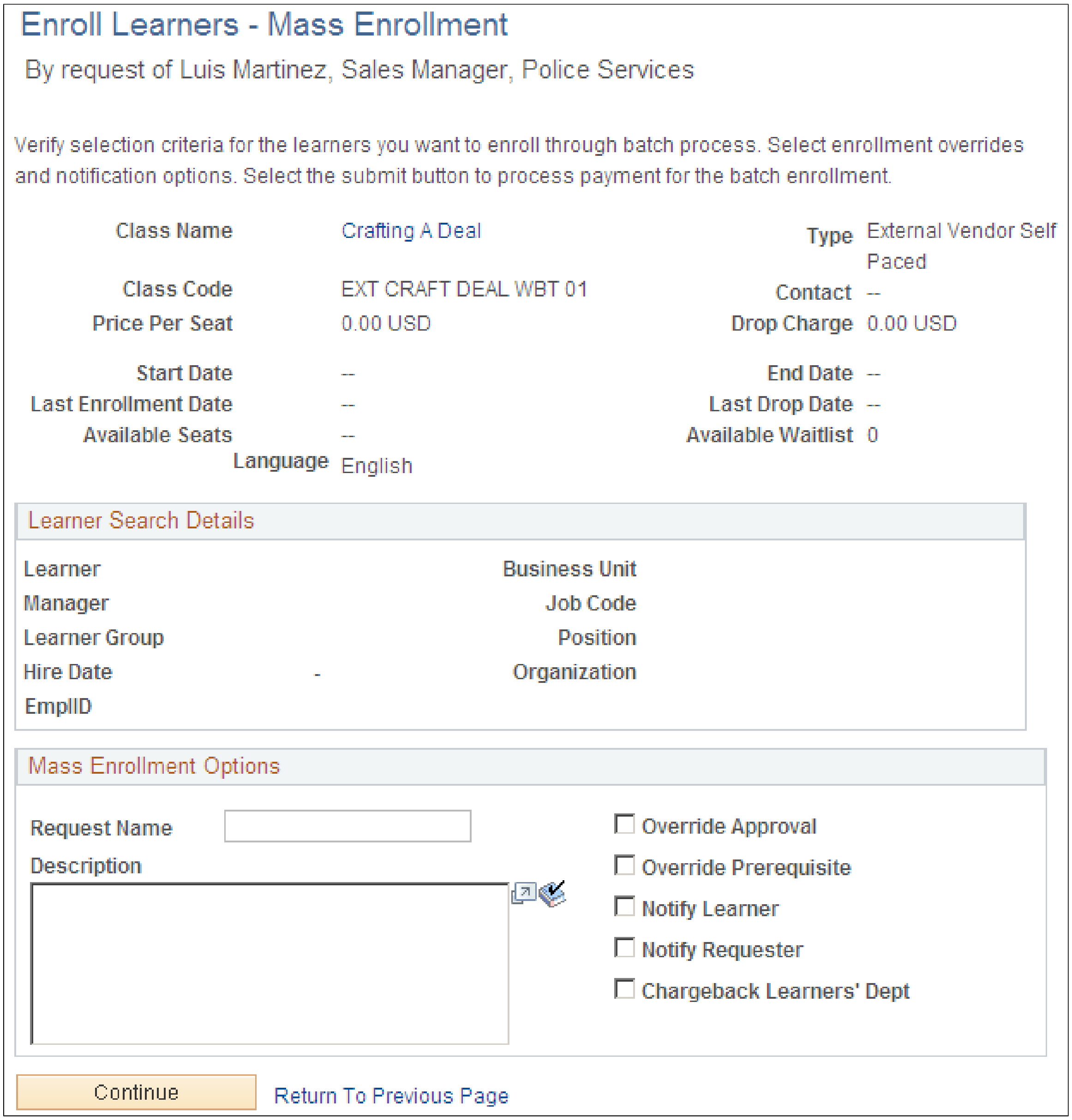
Enroll Learners - Mass Enrollment Page

Use the Enroll Learners - Mass Enrollment page (LM_MASS_SEL_LRNR) to verify selection criteria for the learners whom you want to enroll and specify mass enrollment options such as enrollment overrides and notifications.

Navigation:

Click the **Schedule Mass Enrollment** button on the Group Enrollment - Warning page.

This example illustrates the fields and controls on the Enroll Learners - Mass Enrollment page.



Learner Search Details

This group box displays the search criteria that you enter on the Enroll Learners - Find Learners page.

Mass Enrollment Options

Use this group box to select mass enrollment options.

Field or Control	*Description*
Request Name	Enter the name of the mass enrollment request. This value appears in the **Description** column on the Review Mass Enrollment Requests page. It is a good idea to put in an indicative label and some form of date stamp. This helps you identify the request when you review the requests later.
Description	Enter a description of the mass enrollment request. The system displays the information that you enter on the Review Mass Enrollment report. See Learning Reports.
Override Approval	Select to override manager and administrator approvals for all learners. If the class or program requires approval and you do not select this option, the system sets the enrollment or registration status for all learners to pending approval provided that the learners meet the other conditions for successful enrollment or registration. This option does not override payment approvals that the system requires when a training unit pool or purchase order has an owner assigned.
Override Prerequisite	Select to override required and enforced prerequisites for all learners.
Notify Learner	Select to send an email notification to learners informing them of their enrollment or registration statuses. When you select this check box, all learners receive a notification email regardless of whether their enrollments or registrations were successful.
Notify Requester	Select to send an email notification to the requester upon completion of the process. The notification includes how many learners are successfully and unsuccessfully enrolled or registered. The system generates an email that gets queued to be sent to the requester. The email provides the requester with the total number of successful and unsuccessful enrollments or registrations.
Chargeback Learners' Dept (chargeback learners' department)	Select to use each learner's chargeback information, rather than use the requester's chargeback information for all learners.

See Mass Enrollment Workflow Notifications.

Enroll Learners - Payment Details Page

Use the Enroll Learners - Payment Details page (LM_ENRL_PAY_DTLS) to enter payment information.

Navigation:

Click the **Continue Enrollment** button on the Enroll Learners - Mass Enrollment page.

This is the same page that you use to enter payment information for group enrollment; however fields that pertain to payment methods other than chargebacks are hidden. If you select the **Chargeback Learners' Dept** option on the Enroll Learners - Mass Enrollment page, the system also hides the Enter Charge Back Information group box.

When you click the Submit Enrollment button, the system displays the mass enrollment confirmation ID number.

Related Links

Enroll Learners - Payment Details Page

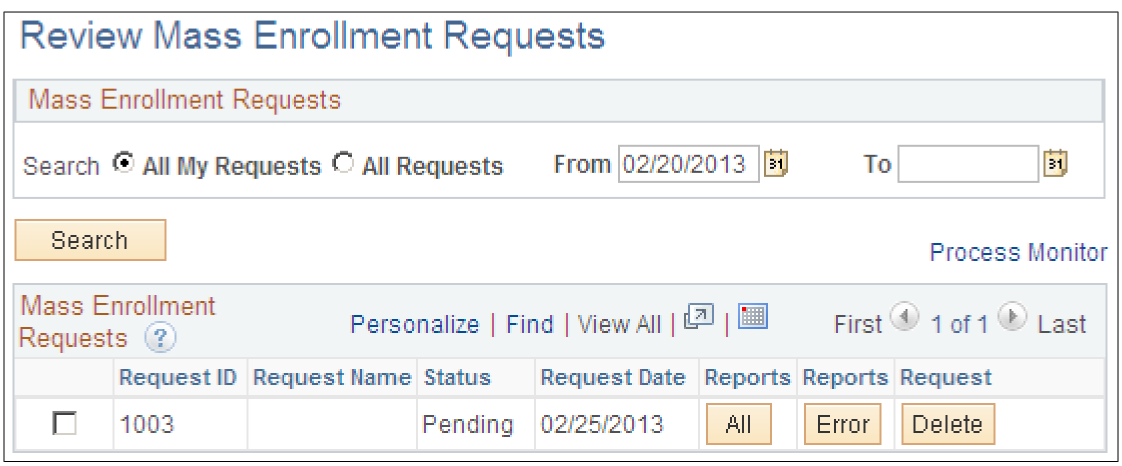
Review Mass Enrollment Requests Page

Use the Review Mass Enrollment Requests page (LM_MASS_RQST_DET) to review mass enrollment requests, delete pending requests, and view reports for processed requests.

Navigation:

Enterprise Learning > **Mass Enrollments** > **Review Mass Enrollment Request** > **Review Mass Enrollment Requests**

This example illustrates the fields and controls on the Review Mass Enrollment Requests.



Field or Control	Description
Request ID	Displays the mass enrollment confirmation ID number that the system assigned when you created the mass enrollment request.

Field or Control	Description
Description	Displays the request name that you enter in the **Request Name** field on the Enroll Learners - Mass Enrollment page.
Status	Displays the status of the mass enrollment request. Values are: *Pending:* Request has not been processed. The system processes all requests with a *Pending* status when you run the Process Mass Enrollment Application Engine process (LM_ MASS_ENRL). *Processed:* Request is processed.
Request Date	Displays the date on which you made the mass enrollment request.
All	Click to run the Review Mass Enrollment report. This version of the report displays all successful and unsuccessful enrollments or registrations. **Note:** You access and view the generated report using Report Manager (**Reporting Tools** > **Report Manager**).
Error	Click to run the Review Mass Enrollment report. This version of the report displays only the unsuccessful enrollments or registrations. **Note:** You access and view the generated report using Report Manager (**Reporting Tools** > **Report Manager**).
Delete	Click to delete an unprocessed request. You cannot delete processed requests.

Process Mass Enrollment Page

Use the Process Mass Enrollment page (LM_MASS_ENRL_RNCTL) to process mass enrollment requests.

Navigation:

Enterprise Learning > **Mass Enrollments** > **Process Mass Enrollment** > **Process Mass Enrollment**

Click **Run** to run this request. PeopleSoft Process Scheduler runs the Process Mass Enrollment process at user-defined intervals.

The Process Mass Enrollment process processes all mass enrollment or registration requests with a pending status. Review successful and unsuccessful enrollments and registrations by using the Review Mass Enrollment Requests.

The system generates emails that get queued to be sent to the learners informing the learners of the new enrollment or registration status. The system also generates email notifications to learners that are not enrolled or registered successfully, and to requesters, if you selected the **Notify Learner** and **Notify Requester** options on the Mass Enrollment page.

Note: Run the Process Mass Enrollment process during off-peak business hours.

Related Links

Enrollment Workflow Notifications

Curricula and Certification Workflow Notifications

Administering Enrollment-Related Tasks

Pages Used to Administer Enrollment-Related Tasks

Page Name	***Definition Name***	***Usage***
Administer Class Roster Page	LM_ROSTER_SRCH	Find and select class rosters for managing enrollment details, or for marking grades and attendance.
Class Roster Page	LM_ACT_ROSTER	View the class roster, update enrollment statuses for learners, and manage waitlists. This page shows all learners regardless of enrollment status.
Class Notifications Page	LM_ACT_NOTIF	Send ad hoc email notifications to the learners on a class roster.
(FRA) Learner Roster Page	LM_LRNR_ROSTER	Update a learner's enrollment status, and update grades, scores, and attendance information. Update DIF information for French users.
(FRA) Component Duration Page	LM_LRNR_ROSTER	Enter a learner's actual training hours for a component and quantify DIF and non-DIF hours, and hours during and outside of the learner's normal schedule.
Enrollment Details - Payment Details Page	LM_PYMT_DTLS_ENR	Edit payment information for a learner.

Understanding Class Rosters

Administrators can use the Administer Class Roster component to search for and access any class roster within their learning environments. Using the rosters, they can approve enrollment requests, manage waitlists, drop learners, and update payment details on a learner's enrollment record. Tasks that are performed by changing a learner's enrollment status, such as dropping a learner or approving enrollment, depend on the learner's current enrollment status and the permission lists that are assigned to the user. Administrators can update the registration status of an individual learner or use a group action to update multiple learners simultaneously. They can also use the group action feature to send ad hoc email notifications to learners.

The Administer Class Roster component can also be used to view and update learners' grades, attendance, and scores. These tasks are discussed elsewhere in this book.

Related Links

Understanding Attendance and Grading

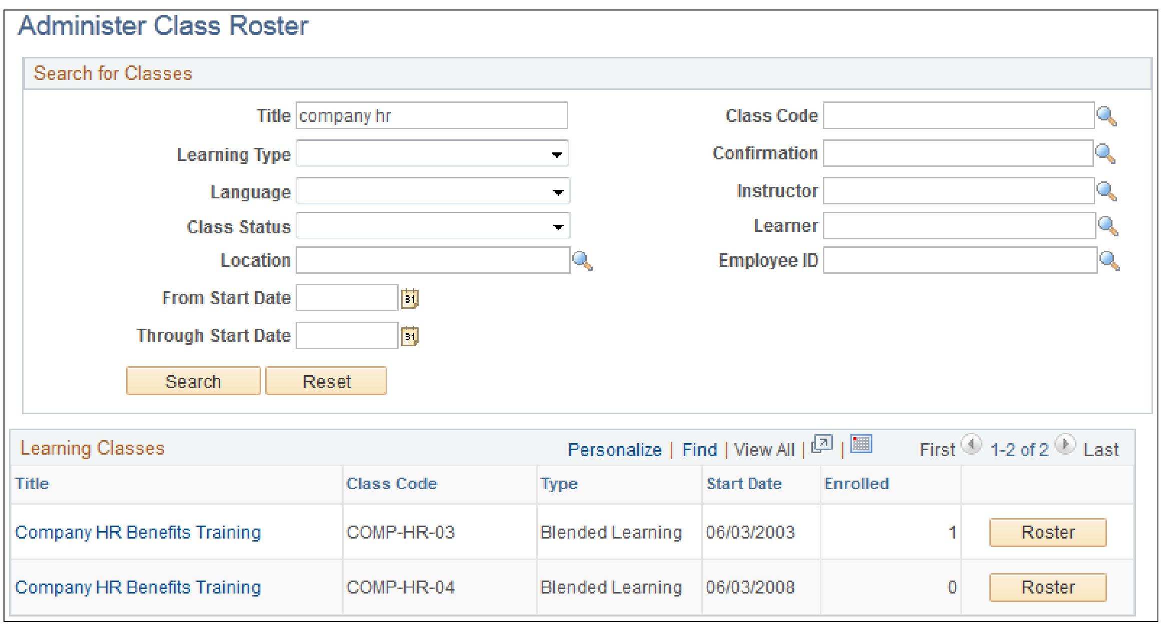
Administer Class Roster Page

Use the Administer Class Roster page (LM_ROSTER_SRCH) to find and select class rosters for managing enrollment details, or for marking grades and attendance.

Navigation:

Enterprise Learning > **Learner Tasks** > **Administer Class Rosters** > **Administer Class Roster**

This example illustrates the fields and controls on the Administer Class Roster page.



Search for Classes

Enter search criteria to search for a class roster. Click the **Search** button to display the search results and **Reset** to clear the search criteria fields.

Learning Classes

Select a class roster from the list of search results. The system displays only classes that are in the learning environment of the administrator and sorts the list by class codes. Click a link in the Class column to view the Class Details page for that class. Click the **Roster** button for the class to display the Class Roster page.

Class Roster Page

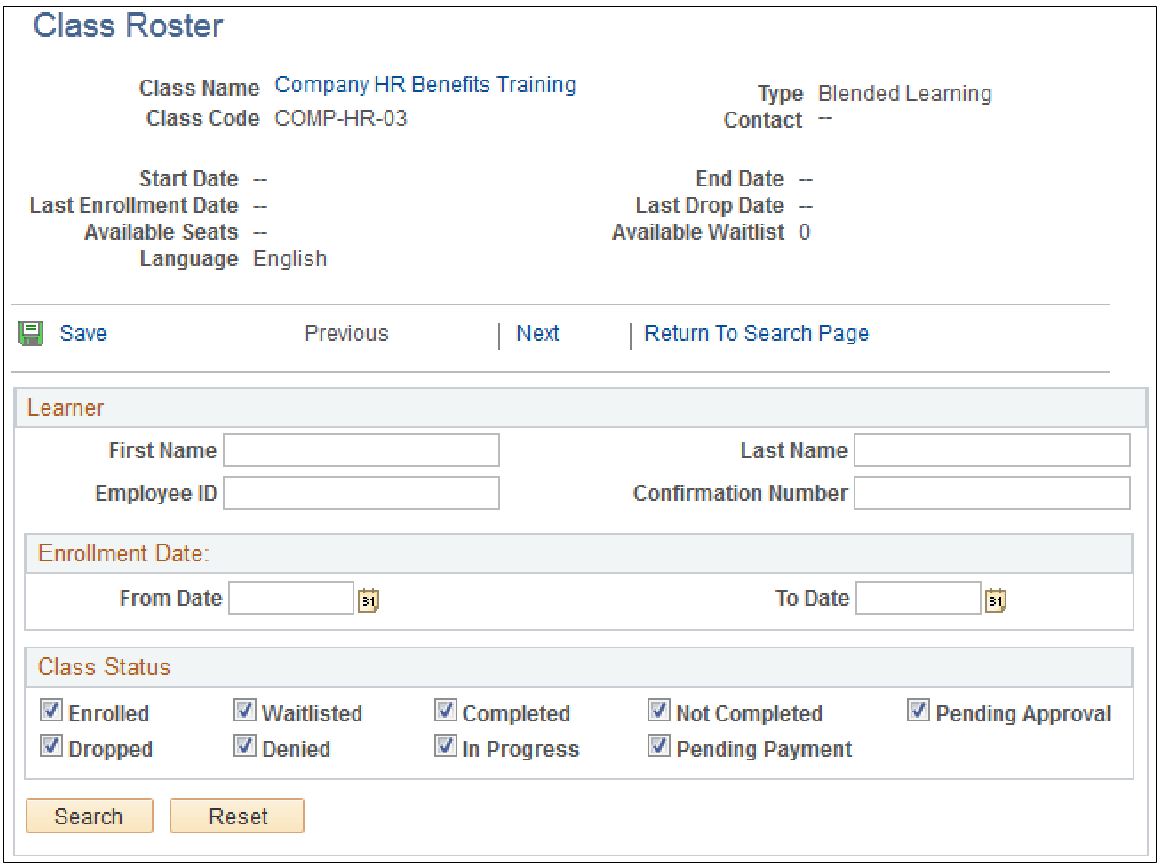
Use the Class Roster page (LM_ACT_ROSTER) to view the class roster, update enrollment statuses for learners, and manage waitlists.

This page shows all learners regardless of enrollment status.

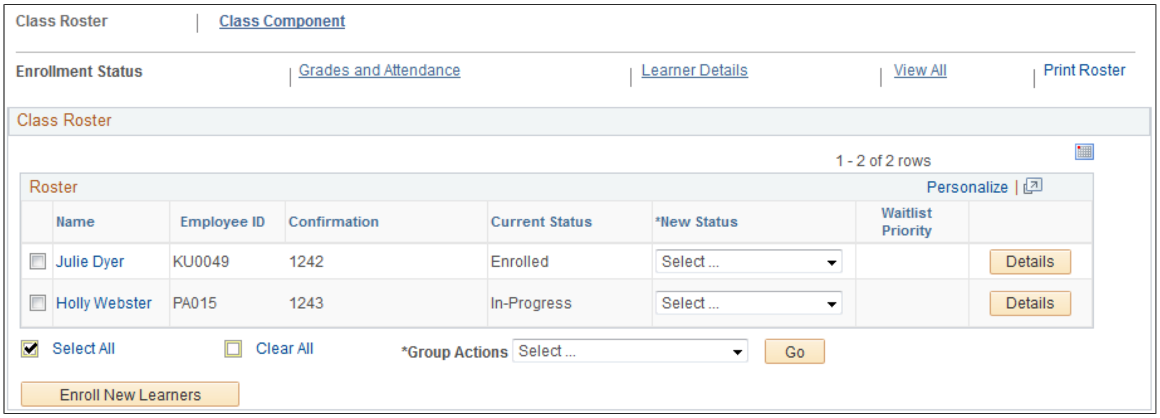
Navigation:

Click the **Roster** button for a class on the Administer Class Roster page.

This example illustrates the fields and controls on the Class Roster page (1 of 2).



This example illustrates the fields and controls on the Class Roster page (2 of 2).



You can narrow the list of learners to display on the roster by entering selection criteria. To display the search fields, click the Search Options link that appears when you first access the page.

Search Option Fields

Enter the learner selection criteria and click the Search button to display learners.

Class Status

Select the corresponding check box to display all learners whose records match that enrollment status. You can select multiple check boxes to refine the search. Filtering by enrollment status is helpful when you want to perform the same task for multiple learners—for example, approve all enrollments that are pending approval.

Enrollment Date

You can search for all learners who enrolled in the class within the date range that you specify in the **From Date** and **To Date** fields and who meet the other search criteria.

Class Roster

The system displays the search results in this grid. The **Enrollment Status** view displays each learner's name, confirmation number, current enrollment status, and waitlist priority.

Field or Control	***Description***
Grades and Attendance	Click to view and update grades, attendance, and scores. See Modifying Passing, Grading, and Attendance Schemes.
Learner Details	Click to view a learner's ID, job title, and status.
View All	Click to view all columns from the Enrollment Status, Grades and Attendance, and Learner Details views.

Field or Control	*Description*
Print Roster	Click to open a printable class roster in a separate browser window, in PDF format. The printable class roster includes only the learners displayed in the Roster grid. You can therefore use the same search filtering for the grid to filter the learners on the roster. **Note:** The roster prints for all learning components.
Name	Click the learner's name link to access the Learner Information page, which displays high-level job and contact information about the user.
Conf # (confirmation number)	Displays the enrollment confirmation number for the learner. The system assigns this number during enrollment.
Current Status	Displays a learner's current enrollment status.

Field or Control	*Description*
New Status	Select a new enrollment status for the learner. The current status and your assigned permission lists determine which options are available. • *Drop:* This status is valid when the learner's current status is waitlisted, pending approval, enrolled, in progress, completed, not completed, or waived. • *Enroll:* This status is valid when the learner's current status is waitlisted or pending payment. • *Move to Learning Request:* This status is valid when the learner's current status is waitlisted or pending payment. When selected, the system add the learner to a learning request for the course. • *Move to New Class:* This status is valid when the learner's current status is Waitlisted, Pending Payment, or Enrolled. When you select this status, the Enroll Learners - Search for Learning page is displayed so that you can enroll the learner in a different class. Once the learner is moved to the new class, the record is removed from this roster. **Note:** When you select this status for a learner with an Enrolled status, the system sets the status of the original enrollment record to Dropped and creates a new enrollment record with a status of Enrolled for the new class that you select. • *Approve:* This status is valid when the learner's current status is pending approval. The system generates an email that gets queued to be sent to the learner informing the learner of the updated enrollment status. See Enrollment Workflow Notifications.

Field or Control	***Description***
Waitlist Priority	Displays a learner's waitlist priority number, if any. The system automatically enrolls the learner with the lowest waitlist priority number first before the class start date. After the class start date, you must enroll a waitlisted learner manually on the roster. You can change a learner's position in the queue by changing the number in this field. If more than one person is given the same number in the waitlist, the system enrolls the learner with the lowest confirmation number first. To enroll a learner who is on the waitlist (with a status of waitlisted): 1. Change the learner's priority to *1*. 2. Increase the maximum enrollment on the Classes - Class Details page. 3. Select *Enroll* in the New Status field. When you enroll a waitlisted learner, the system generates an email that gets queued to be sent to the learner informing the learner of the updated enrollment status. See Enrollment Workflow Notifications.
Details	Click to access the Learner Roster page, where you can enter learner attendance statuses, completion statuses, grades, and scores, for all learning components that are within the class. This page is identical to the page that instructors use to enter attendance statuses, passing statuses, completion statuses, grades, and scores for a learner for all learning components within the class. See Learner Roster Page.

Field or Control	*Description*
Group Actions	You can apply the same action (status change) to multiple learners at the same time. Click the check box next to the learners' names and select the action here. You can select from the list of actions that are permitted for your security profile, including *Drop, Enroll, Move to Learning Request, Move to New Class,* and *Send Notification.* When you click Go, the Review Information page appears. Click to access the Send Notification page, where you can select a set of learners from the roster and send an improvised email to them and other interested parties. This is useful if you want to notify all learners at the same time of a class change, or send them class reminders.
Enroll New Learners	Click to access the Enroll Learners - Find Learners page where you can enroll new learners in the class.

(FRA) Learner Roster Page

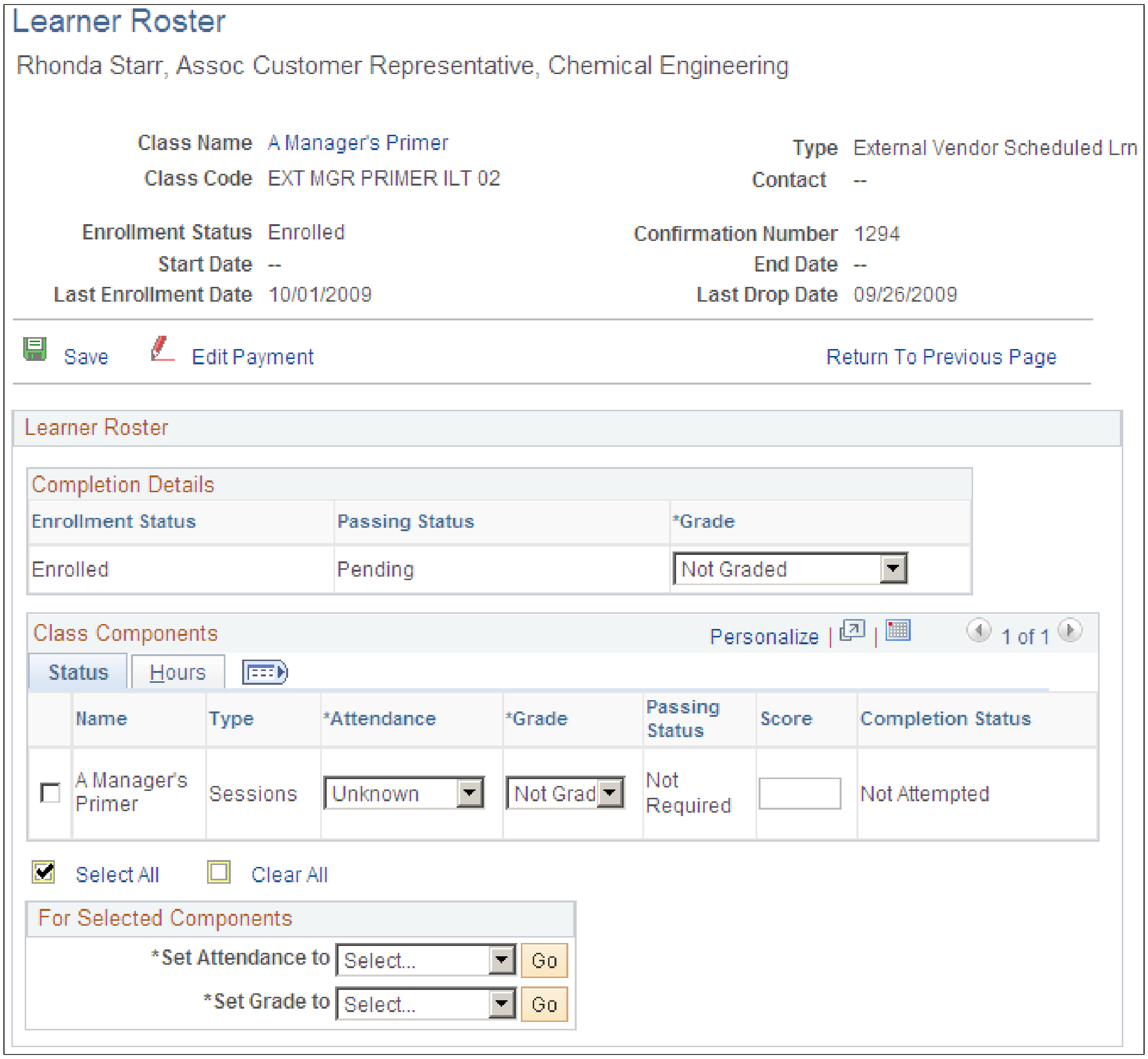
Use the Learner Roster page (LM_LRNR_ROSTER) to Update a learner's enrollment status, and update grades, scores, and attendance information.

Update DIF information for French users.

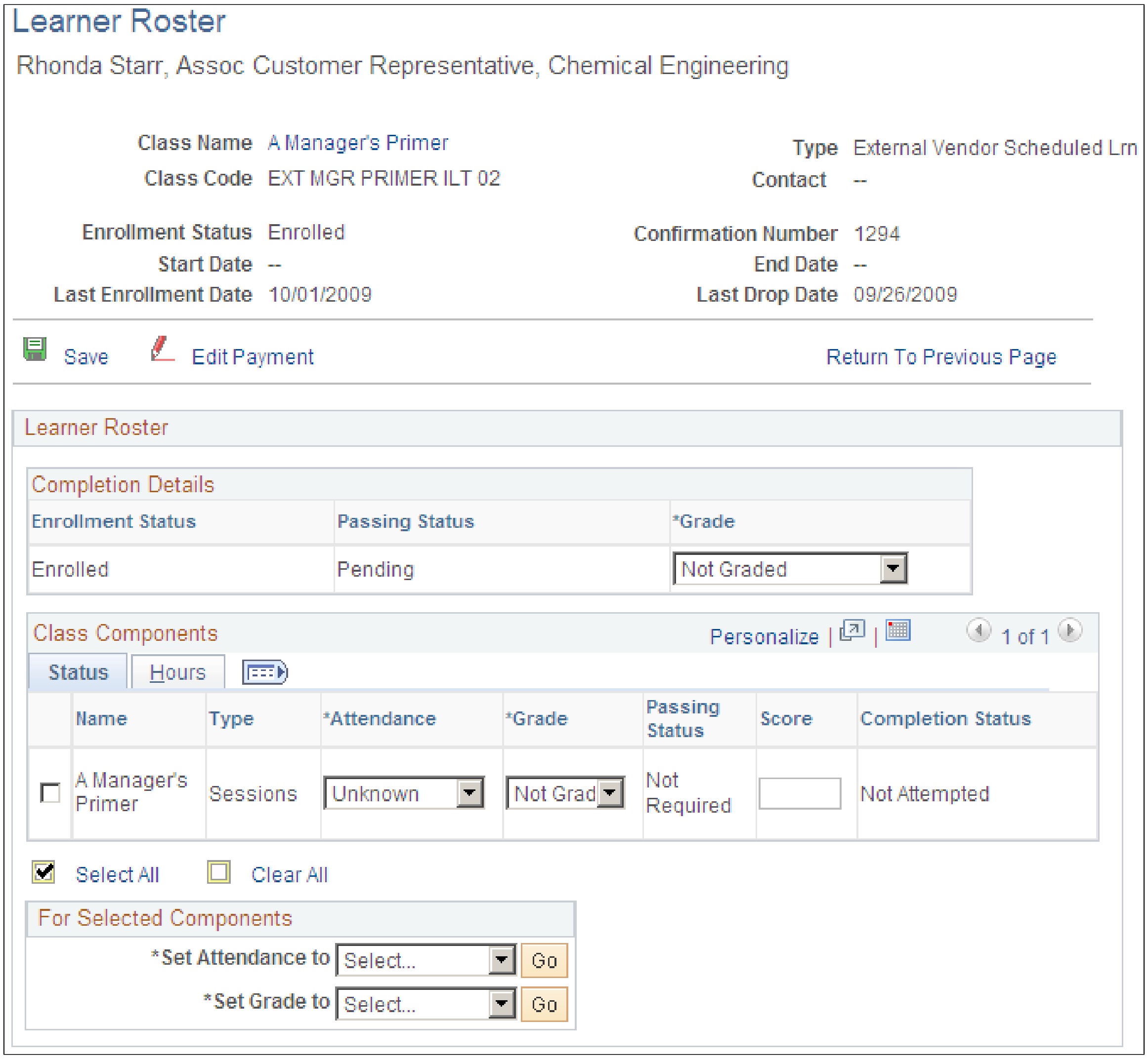
Navigation:

Click the **Details** button for a learner on the Class Roster page.

This example illustrates the fields and controls on the Learner Roster page (1 of 2).



This example illustrates the fields and controls on the Learner Roster page (2 of 2).



Completion Details

This group box displays the learner's enrollment status in the class, the passing status, and enables you to enter a grade for the class.

Class Components: Status

The Status tabs provides fields for updating a learner's attendance, grade, passing status, and score for each learning component. These fields are the same as those on the Component Roster group box on the Component Roster page.

See Component Roster Page.

For Selected Components

These fields are the same as those on the Component Roster page.

See Component Roster Page.

(FRA) DIF

This group box appears only when the current administrator's learning environment is enabled for French features and the course is defined as eligible for DIF.

Field or Control	Description
Apply Class Toward DIF	This check box is selected by default, if the Apply Class Toward DIF option was selected during enrollment. When selected, the learning component hours (as defined on the Recommended Duration page when creating the class) are treated as DIF training hours outside the working schedule. You can use the Component Duration page to indicate that only part of the class was taken with DIF hours. For example, say that a component is 15 hours, but only 10 hours are taken as DIF outside the normal working schedule. In this case, you can use the Component Duration page to indicate that only 10 hours were taken as DIF hours outside the normal working schedule. The system does not prevent learners from exceeding their DIF balances. See (FRA) Component Duration Page.

(FRA) Learning Class

This group box appears only when French features are enabled for the administrator's learning environment. Define classifications on the Learning Classifications page.

Field or Control	Description
Learning Class	The system displays the default learning classification that is assigned to the course for this class. You can override the classification shown here.
Training Plan Category	Enter the training plan category that applies to this enrollment. Like learning classifications, training plan categories appear on training reports and can affect a learner's compensation for training time.

(FRA) DIF Balance

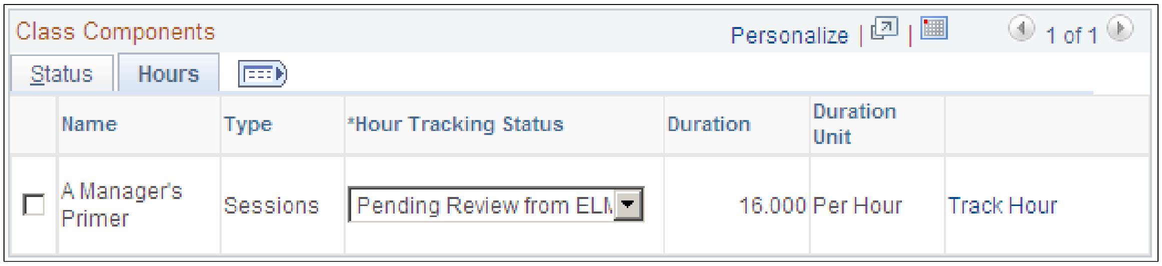
This grid appears only when the current administrator's learning environment is enabled for French features and the course is defined as eligible for DIF.

When you import DIF balances from a Payroll application such as PeopleSoft Enterprise Global Payroll for France, this grid can display the learner's calculated DIF balance and DIF in advance. The As of Date represents the date on which balances were last calculated by the payroll application. Balances are shown for the last five months. Only one row appears at a time; use the buttons on the grid to display previous balances. The duration unit is always hours.

(FRA) Class Components: Hours

Click the Hours tab.

This example illustrates the fields and controls on the Learner Roster: Hours tab.



The Hours tab appears only when the current administrator's learning environment is enabled for French features.

Field or Control	***Description***
Hour Tracking Status	If you send training hours to a payroll application through the Administer Training business process, this field shows the current validation status for the hours. The initial status is *Pending Review from ELM.* You can use this field to validate the hours or cancel their transmission. Valid selections depend on the current status. Administrators can also use the Validate Training Hours page to view and update the hour tracking status. See Validate Training Hours Page.
Duration	The system displays the component duration that is defined on the Recommended Duration page. (Complete the Recommended Duration page when defining the class.)
Duration Unit	Component duration is always expressed in hours here.
Track Hour	Click to access the Component Duration page so that you can update the duration and associated hour types.

(FRA) Component Duration Page

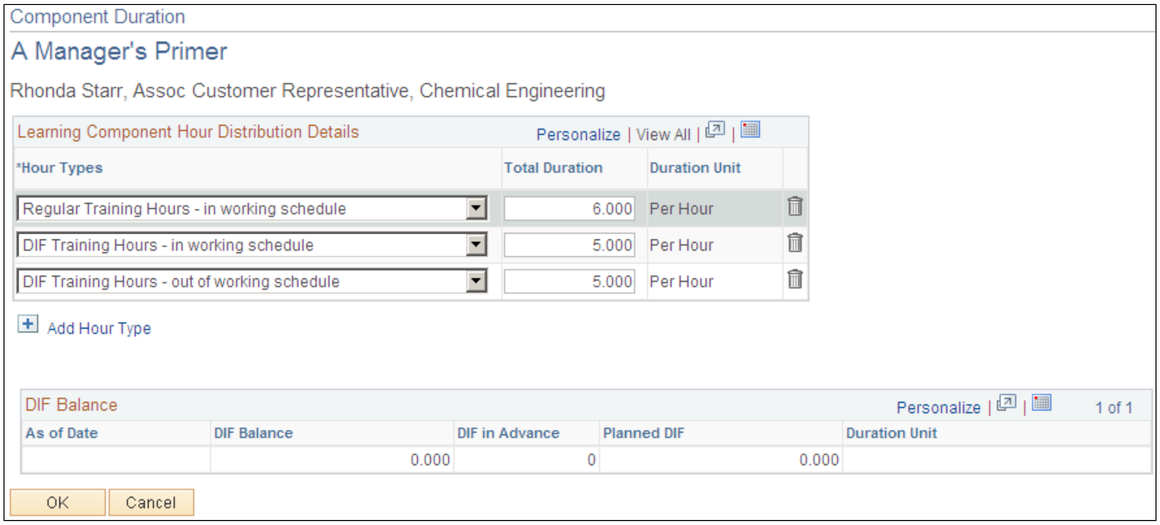
Use the Component Duration page (LM_LRNR_ROSTER) to enter a learner's actual training hours for a component and quantify DIF and non-DIF hours, and hours during and outside of the learner's normal schedule.

Navigation:

Click the **Hours** tab on the Learner Roster page. Click Track Hour.

(The Hours tab only appears on the Learner Roster page when the current administrator's environment is enabled for French functionality.)

This example illustrates the fields and controls on the Component Duration page.



Use this page to identify, by hour type, the number of hours of training the learner completed for this component.

For example, you can specify the number of DIF hours that occurred outside of the learner's normal work schedule. Duration and hour type information is sent to the Administer Training business process when you publish training hours.

Field or Control	***Description***
Hours Types	Use hour types to identify the number of DIF and non-DIF hours of training that occurred during and outside of the learner's normal work schedule. If the **Apply Class Toward DIF** check box is selected on the Learner Roster page, the options are: *DIF Training Hours - out of working schedule* (the default), *DIF Training Hours - in working schedule, Regular Training Hours - in working schedule,* and *Regular Training Hours - out of working schedule.* If the **Apply Class Toward DIF** check box is not selected, the options are: *Regular Training Hours - in working schedule* (the default) and *Regular Training Hours - out of working schedule.*

Field or Control	Description
Total Duration	Enter the duration. By default, the system displays the duration entered on the component's Recommended Duration page. If the sum of the duration values entered here exceed the duration stated on the Hours tab of the Learner roster, the system displays a warning.

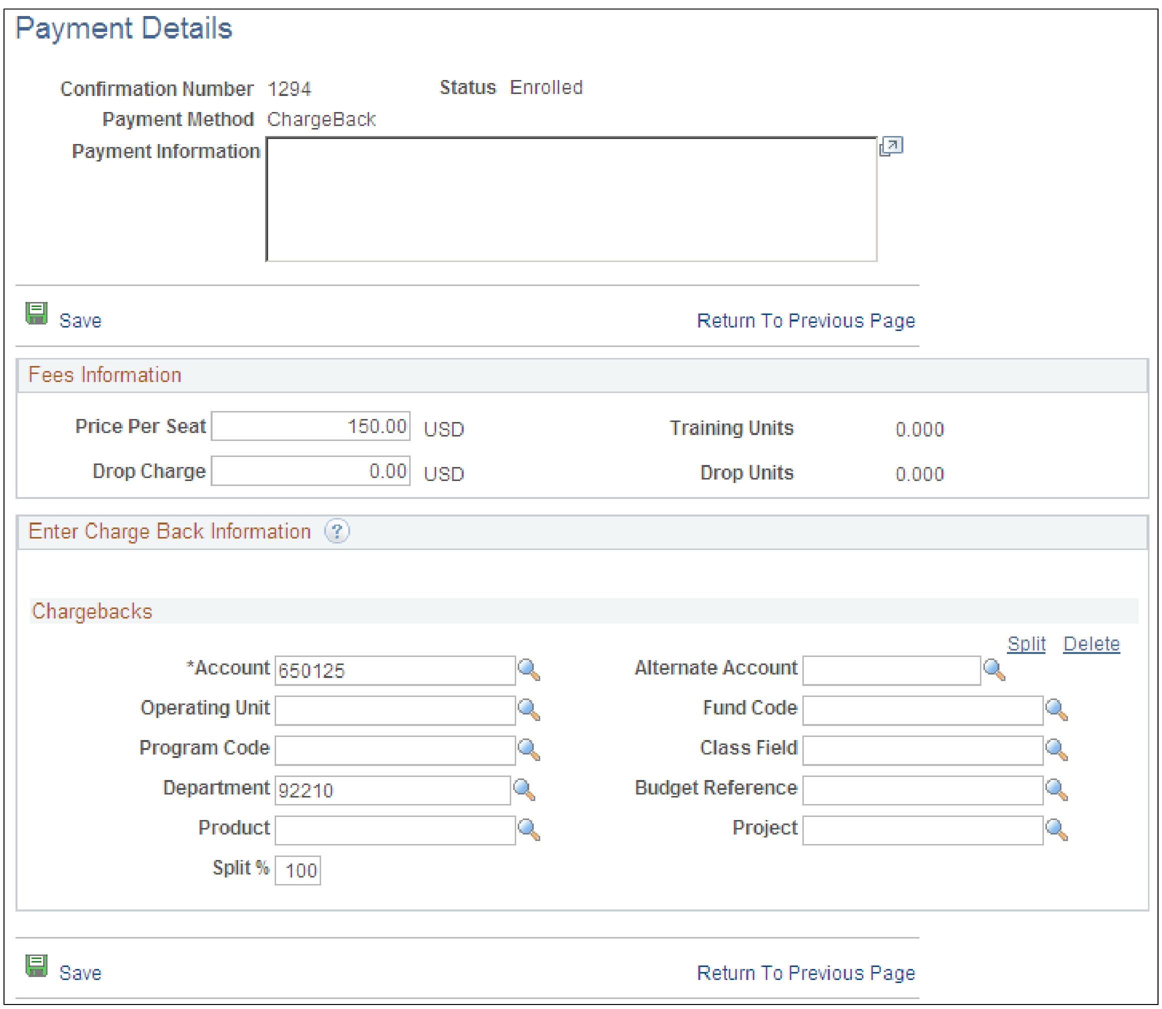
Enrollment Details - Payment Details Page

Use the Enrollment Details - Payment Details page (LM_PYMT_DTLS_ENR) to edit payment information for a learner.

Navigation:

Click the **Edit Payment** link on the Learner Roster page.

This example illustrates the fields and controls on the Enrollment Details - Payment Details page.



Fees Information

Use this group box to edit payment information. You can increase or decrease prices after enrollment. You can also change drop charges at any time. However, the exception to this rule is that you can only decrease class prices for payments done using training units and purchase orders; you cannot increase them. In addition, you cannot make drop charges for enrollments where training units or purchase orders were used higher than the class price. Changes to drop charges take affect only if you make the changes before you drop the learner. The system does not allow changes to drop charges for a learner after you drop the learner.

Any changes to class prices or drop charges result in a new transaction row in the Transaction table for the enrollment record. This enables you to keep track of all payment changes to an enrollment record.

Note: There is a process that exports payment information from the Transaction table to the Enterprise Learning Management subledger, and then from the subledger to the general ledger in the financials system. If the transaction is already exported to the general ledger in the financials system, you must manually update the general ledger with any changes that you make to payment details.

Changing Payment Information

The payment method group box the system displays on this page varies depending on the payment method that you select during enrollment. You cannot change the payment method, but you can update the payment information. Any changes that you make to the payment information result in a new transaction row in the Transaction table for the enrollment record. This enables you to keep track of all payment changes to an enrollment record.

See Understanding Enrollment and Registration.

Note: For security reasons, the system shows only the last four digits of credit card numbers on this page.

Important! The Enrollment Details - Payment Details page always uses the current ChartField configuration, not the ChartField configuration that was used to enroll the learner in the class. When you add a new split entry, the system displays the default ChartField values for the new split entry, which the administrator can change.

Administering Registration-Related Tasks

Pages Used to Administer Registration-Related Tasks

Page Name	*Definition Name*	*Usage*
Administer Program Rosters Page	LM_PRG_RSTR_SRCH	Search for and access program rosters.
Program Details Page	LM_PRG_SUMM_PG	View detailed information about the program including the completion rules, objectives, prerequisites, and notes and attachments.

Page Name	***Definition Name***	***Usage***
View Curriculum Roster Page View Certification Roster Page	LM_PRG_ROSTER	View a program roster and update the program status for one or more learners.
Status Details Page	LM_PRG_RST_GRP_ACT	Confirm a requested change to the learner's registration status.
View Curriculum Roster (learner details) Page View Certification Roster (Learner Details) Page	LM_RSTR_DET	Update a learner's program status and certification dates. You can also view a history of the learner's registration status, and payment information.
Group Action Summary Page	LM_GPR_ACT_SUMMARY	View the list of learners for whom the selected status change is not applicable. Confirm the status change for the other learners.
Update Confirmation Page	LM_PRG_REG_CONF	View a confirmation of a status change.
Payment Details Page	LM_PYMT_DTLS_REG	Edit payment information for a learner.
Curriculum Progress Certification Progress Page	LM_PRG_PROGRESS	View section requirements and the learner's progress.
Ad hoc Program Notifications Page	LM_PRG_NOTIF	Send email messages about the program to learners and other interested parties.

Understanding Program Rosters

Administrators can use the Administer Program Rosters component to search for and access rosters for the programs within their learning environment. An administrator can narrow the set of learners to view for a given program by entering detailed selection criteria.

The tasks that can be performed through a roster depend on a learner's current registration status and the permission lists that are assigned to the administrator's role. Common tasks include approving registration requests, dropping learners, waiving programs, and updating payment details and certification dates.

Most tasks are accomplished by updating the learner's registration status. You can update the registration status of an individual learner or use a group action to update the status of multiple learners simultaneously. Administrators can also use the group action feature to send ad hoc email notifications to learners.

Steps for Updating Learner Registration Status

Steps for updating the program registration status for one or more learners follows:

1. Access the Administer Program Rosters page and search for the program.
2. Click the program's Roster button.

   The View Curriculum Roster page or the View Certification Roster page appears.
3. (Optional) To filter the list of learners, click the Search Options link, enter search criteria, and click Search.
4. To update the status of an individual learner, select a value in the New Status field.

   The Status Details page appears so that you can enter comments, select a reason for the status change, and view certification dates, if applicable.

   Note: Instead of selecting a new status here, you can click the Details link. The View Curriculum Roster (learner details) page or the View Certification Roster (learner details) page appears. Here you can perform the same tasks as on the Status Details page plus access additional information about the learner.

   ---
5. To update the status of multiple learners at the same time:
   - Select the check box for each learner whose registration status you want to update.
   - Select a value in the Group Action field and click Go.

     The Group Action Summary page appears with a list of learner for whom the selected status is invalid, and a separate list of the learners who will have their status changed.
   - Click Continue.
6. If applicable, select the reason for the status change and enter a comment.
7. If the eSignature feature is enabled, enter your password to verify your identity.
8. Confirm the change.

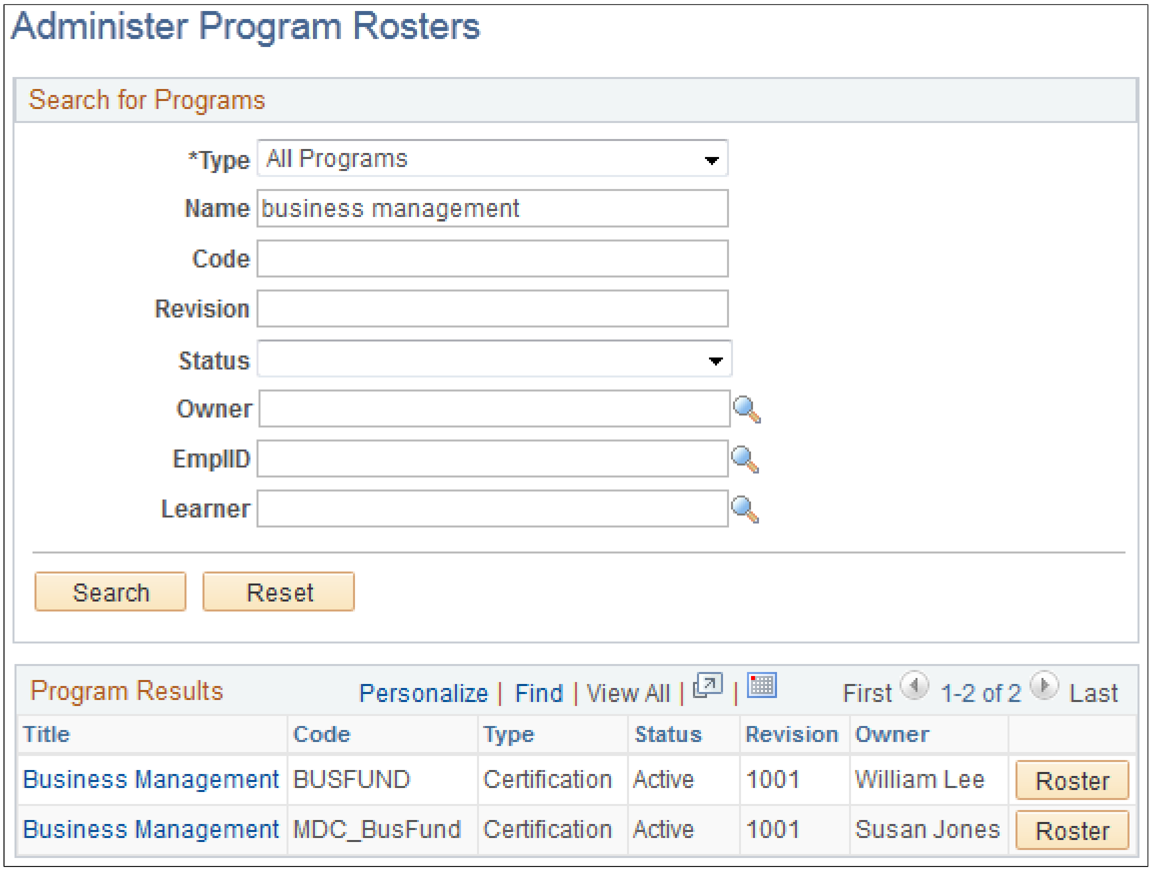
Administer Program Rosters Page

Use the Administer Program Rosters page (LM_PRG_RSTR_SRCH) to search for and access program rosters.

Navigation:

Enterprise Learning > **Learner Tasks** > **Administer Program Rosters** > **Administer Program Rosters**

This example illustrates the fields and controls on the Administer Program Rosters page.



Advanced Search

Specify one or more of the following criteria to narrow the search of possible programs rosters that you can view, then click **Search.** Click **Reset** to refresh the search criteria fields.

Field or Control	***Description***
Type	Select the type of program: *All Programs, Certifications,* or *Curriculum.*
Name	Enter a word or partial word from the name of the program.
Code	Select a specific program code.
Revision	Enter a program revision code.
Status	Select the status of the programs to retrieve: *Active, Inactive,* or *Pending.*

Field or Control	*Description*
Owner	Select the program owner.
EmplID (employee ID)	Select the employee ID.
Learner	Select a specific learner for whom you are searching for program rosters.

Program Results

Select a program roster from the list of search results. The system displays only programs that are in the administrator's learning environment. Programs are sorted by effective date and program code. Click the Roster button for a program to access its roster.

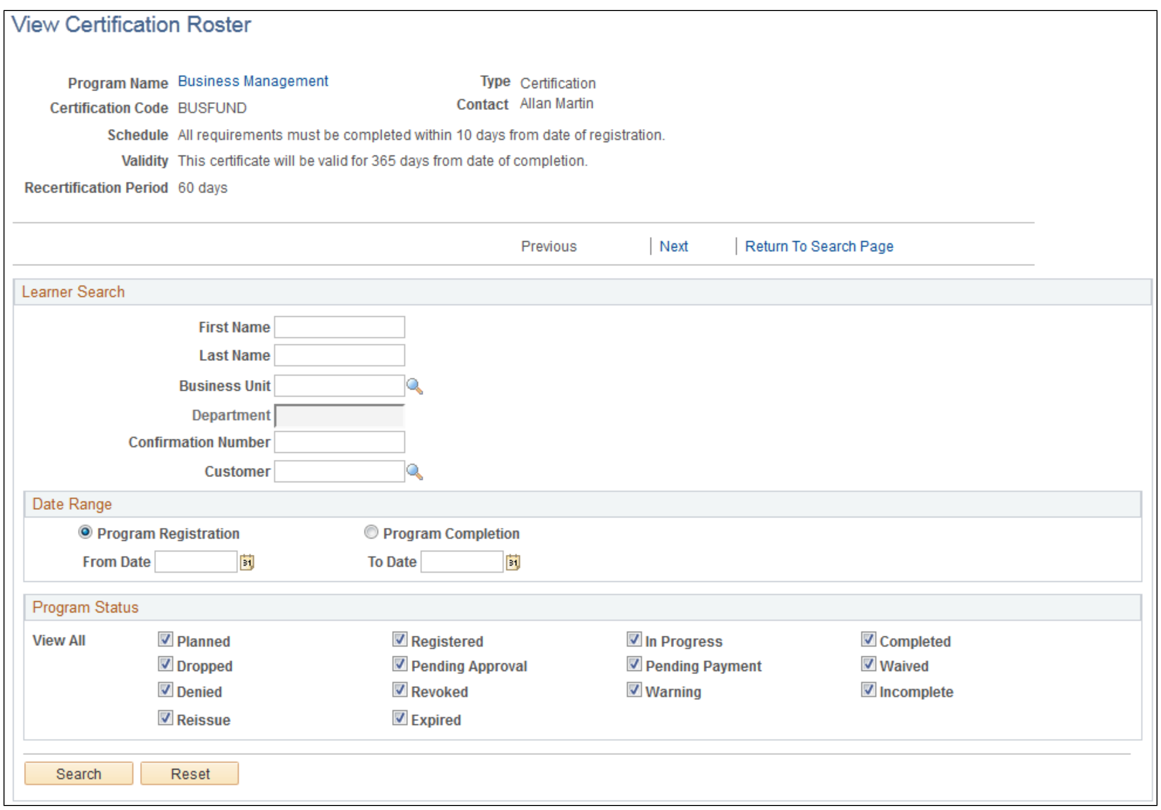
View Certification Roster Page

Use the View Curriculum Roster or View Certification Roster pages (LM_PRG_ROSTER) to view a program roster and update the program status for one or more learners.

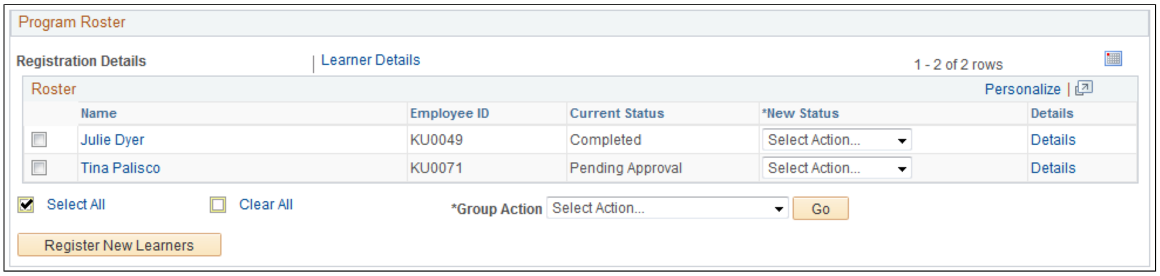
Navigation:

Click the **Roster** button for a program on the Administer Program Rosters page.

This example illustrates the fields and controls on the View Certification Roster page (1 of 2).



This example illustrates the fields and controls on the View Certification Roster page (2 of 2).



You can narrow the list of learners to display on the roster by entering selection criteria in the Learner Search section of the page. To display the search fields, click the Search Options link that appears when you first access the page.

Learner Search

Enter the learner selection criteria and click the Search button to display learners.

Field or Control	***Description***
First Name and **Last Name**	Enter the full or partial first name or last name of a learner.
Business Unit	Select a general ledger business unit.
Department	Select a department. This field is active only if a business unit is selected in the **Business Unit** field.
Confirmation Number	Enter the learner's registration confirmation number to display a specific learner registration. The search ignores all other criteria.
Customer	Select a customer organization if searching for external learners.

Date Range

Select the **Program Registration** option to search for all learners who registered for this program within the date range that you specify in the **From Date** and **To Date** fields and who meet the other search criteria. Select the **Program Completion** option to search for only the learners who completed this program within the date range that you specify and who meet the other search criteria. The system displays by default all learners who registered for this program within the last 90 days.

Program Status

Select the corresponding check box to display all learners whose records match that registration status. You can select multiple check boxes to refine the search.

Program Roster: Registration Details

The system displays the search results in this grid. You can update the status of an individual learner by completing the New Status field, or you can update the status of multiple learners by using the Group Action field.

Field or Control	***Description***
Learner Details	Click this link to view the learner's name, employee ID, hire date, and job title
Name	Click the learner's name link to access the Learner Information page, which displays high-level job and contact information about the user.
Current Status	Displays a learner's current registration or certification status.

Field or Control	Description
New Status	To update an individual learner's program status, select the new status here. The values from which you can select depend on the learner's current status and the types of changes you're authorized to make based on the permission lists that are associated with your role. The Status Details page appears when you select the new status. Use that page to enter comments and select a reason for the update, if applicable. For certification programs, you can view—and in some cases—update certification dates. • *Approve:* This status is valid when the learner's current status is pending approval. The system updates the learner's registration status to registered or in progress (if the learner is already enrolled in classes for the program) and generates the Program Registration Confirmation email notification that gets queued to be sent to the learner informing the learner of the updated registration status. • *Completed:* This status is valid when the current status is planned, in progress, or warning. The system generates the Certification Issue email notification that gets queued to be sent to the learner informing the learner of the updated registration status. • *Denied:* This status is valid when the current status is pending approval. The system generates the Program Registration Denied email notification that gets queued to be sent to the learner informing the learner of the updated registration status. • *Dropped:* This status is valid when the current status is planned, pending approval, pending payment, registered, or in progress. Select to drop the learner from the program. When you confirm the drop, the system generates the Program Registration Drop email notification that gets queued to be sent to the learner informing the learner of the updated registration status. • *Expired:* (Certifications only) This status is valid when the current status is completed, warning or waived. When you select this status, the system generates the Certification Expiration email that gets queued to be sent to the learner informing the learner that the certification has expired. • *Not Completed:* This status is valid when the current status is planned or in progress. The system generates

Field or Control	Description
	the Registration Incomplete email notification that gets queued to be sent to the learner informing the learner of the updated registration status. • *Register:* This status is valid when the current status is pending payment. The system generates the Program Registration Confirmation email notification that gets queued to be sent to the learner informing the learner of the updated registration status. • *Reissue:* (Certifications only) This status is valid when the current status is expired or revoked. When you select this status, the system generates the Certification Reissue email that gets queued to be sent to the learner informing the learner that the certification has been reissued. The system recalculates the new certification dates based on the reissue date, which defaults to today's date. You can update the dates, as needed. • *Revoked:* (Certifications only) This status is valid when the current status is waived or complete. When you select this status, the system generates a Certification Revocation email that gets queued to be sent to the learner informing the learner of the revocation. • *Waived:* This status is valid when the current status is planned, in progress, or registered. When you select this status, the system generates a Certification Waiver email that gets queued to be sent to the learner informing the learner that his or her certification has been waived. • *Warning:* (Certifications only) This status is valid when the current status is waived, reissue, or completed. When you select this status, the system generates a Certifications Warning email that gets queued to be sent to the learner reminding the learner of the upcoming deadline for completing the certification. The generated email notifications are sent when you run the LM_NOTIFY process that is launched through the Enrollment Notifications run control page.
Details	Click this link to access the View Curriculum Roster (learner details) component or the View Certification Roster (learner details) component.

Field or Control	*Description*
Group Action	You can apply the same action (status change) to multiple learners simultaneously. Click the check box next to the learners' names and select the action here. You can select from the list of actions that are permitted for your security profile. When you click Go, the Group Action Summary page appears. It lists any learners for whom the selected action was invalid and enables you to confirm the change for everyone else.
Register New Learners	Click to access the Enroll Learners - Find Learners page where you can register new learners in the program.

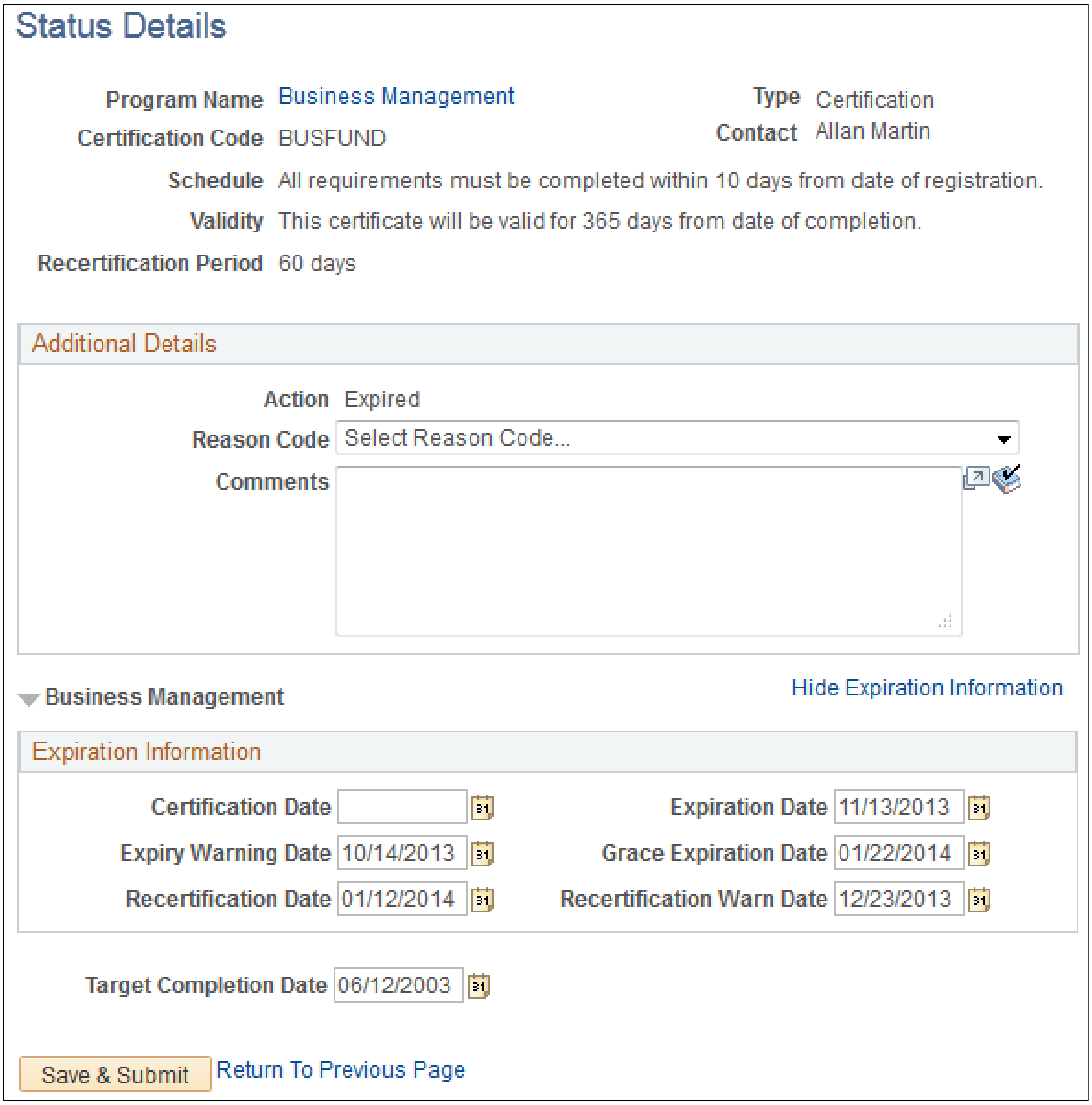
Status Details Page

Use the Status Details page (LM_PRG_RST_GRP_ACT) to confirm a requested change to the learner's registration status.

Navigation:

- Click Continue on the Group Action Summary page.
- Select a new status for a learner on the View Curriculum Roster page or the View Certification Roster page.

This example illustrates the fields and controls on the Status Details page.



Additional Details

Field or Control	*Description*
Reason Code	Select the reason for the status change. To use this feature, reason codes must be set up and enabled for the administrator's learning environment. See Defining Reasons for Program and Class Status Updates.
Comments	Enter an explanation of the status change. Comments are informational only and do not appear on other pages.

Expiration Information

This group box is displayed when you select a new status for a learner on the View Curriculum Roster page or the View Certification Roster page. The displayed dates are based on the certification date.

Field or Control	***Description***
Certification Date	The date that the learner obtains certification in this program. You should not change this date.
Expiration Date	The date that the learner's certification in this program expires. If you change this date it must be greater than the certification date, less than the recertification date, and less than or equal to the grace expiration date.
Expiry Warning Date	The date on which to generate an expiration warning message for the learner and the learner's manager.
Grace Expiration Date	The date that the learner's certification expires, including the grace period. This is the actual expiration date. This date should be equal to or greater than the expiration date.
Recertification Date	The date by which the learner must complete recertification for this program. Administrators can extend this date to give the learner more time to get recertified. The recertification date must be greater than all other dates on this page except the grace expiration date.
Recertification Warn Date	Enter the date on which to generate an email warning for the learner. The default value is today's date.

Target Completion Date

The Target Completion Date field is displayed for certification programs and displays the date by which the learner must complete all requirements for this certification. If the learner does not complete all requirements, the system updates the learner's registration status to Not Completed when the Process Program Updates process (LM_CERT_STAT) runs. You can extend this date when the certification is not yet completed.

View Certification Roster (Learner Details) Page

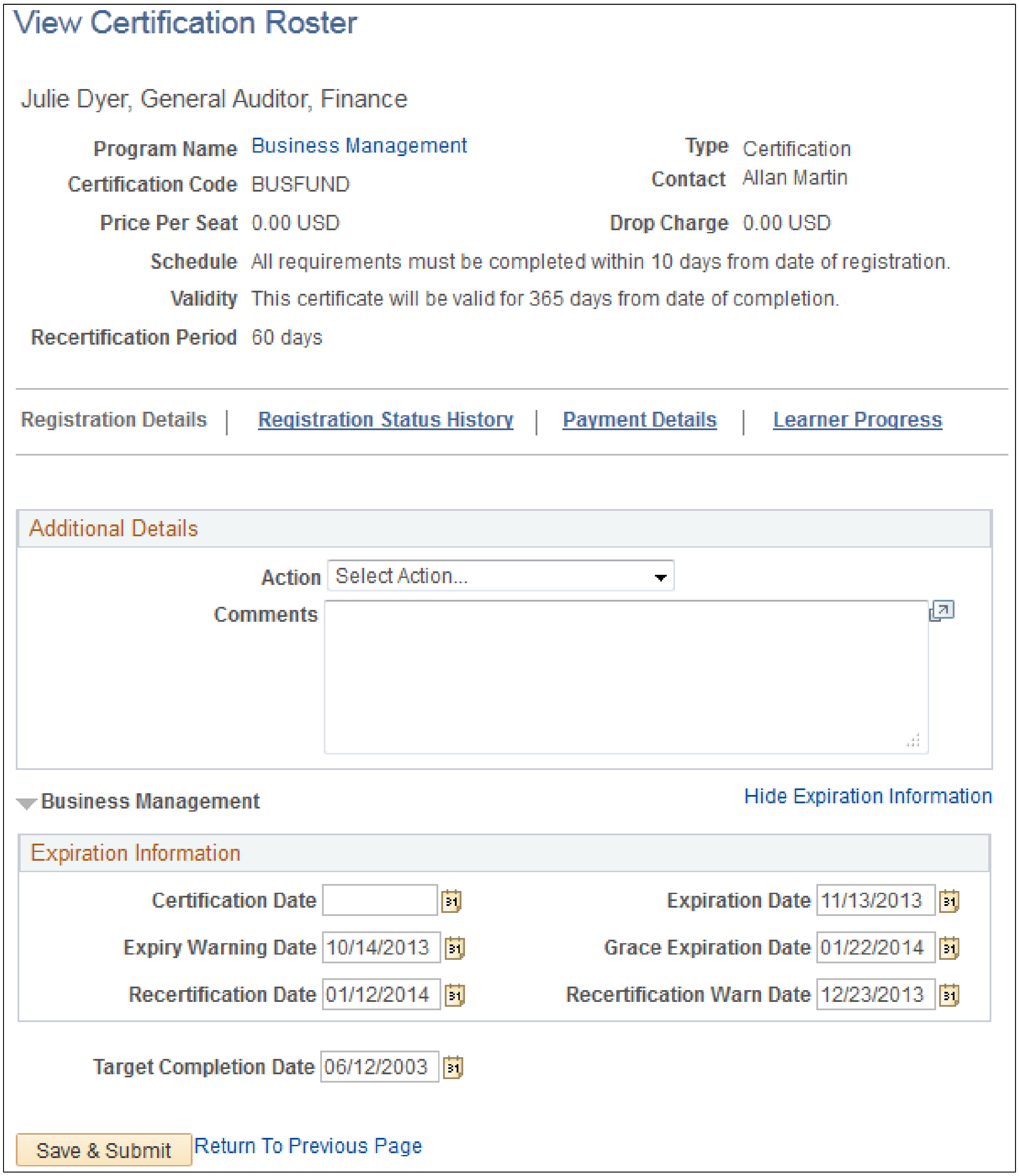
Use the View Certification Roster (learner details) or View Curriculum Roster (learner details) page (LM_RSTR_DET) to update a learner's program status and certification dates.

You can also view a history of the learner's registration status, and payment information.

Navigation:

Click the **Details** link for a learner on the View Curriculum Roster page or the View Certification Roster page.

This example illustrates the fields and controls on the View Certification Roster (learner details) page.



When you access this page, it's appearance is similar to the Status Details page. Links on this page provide access to additional information that you cannot access through the Status History page.

Field or Control	*Description*
Registration Status History	Click to display the learner's registration history for this program.
Payment Details	Click to display payment information for this registration. You can then select the Edit Payment Details button to access the Payment Details page, which is similar to the Enrollment Details - Payment Details page. See Enrollment Details - Payment Details Page.
Learner Progress	Click to access the Curriculum Progress page or the Certification Progress page that you can use to view the learner's progress for this program.

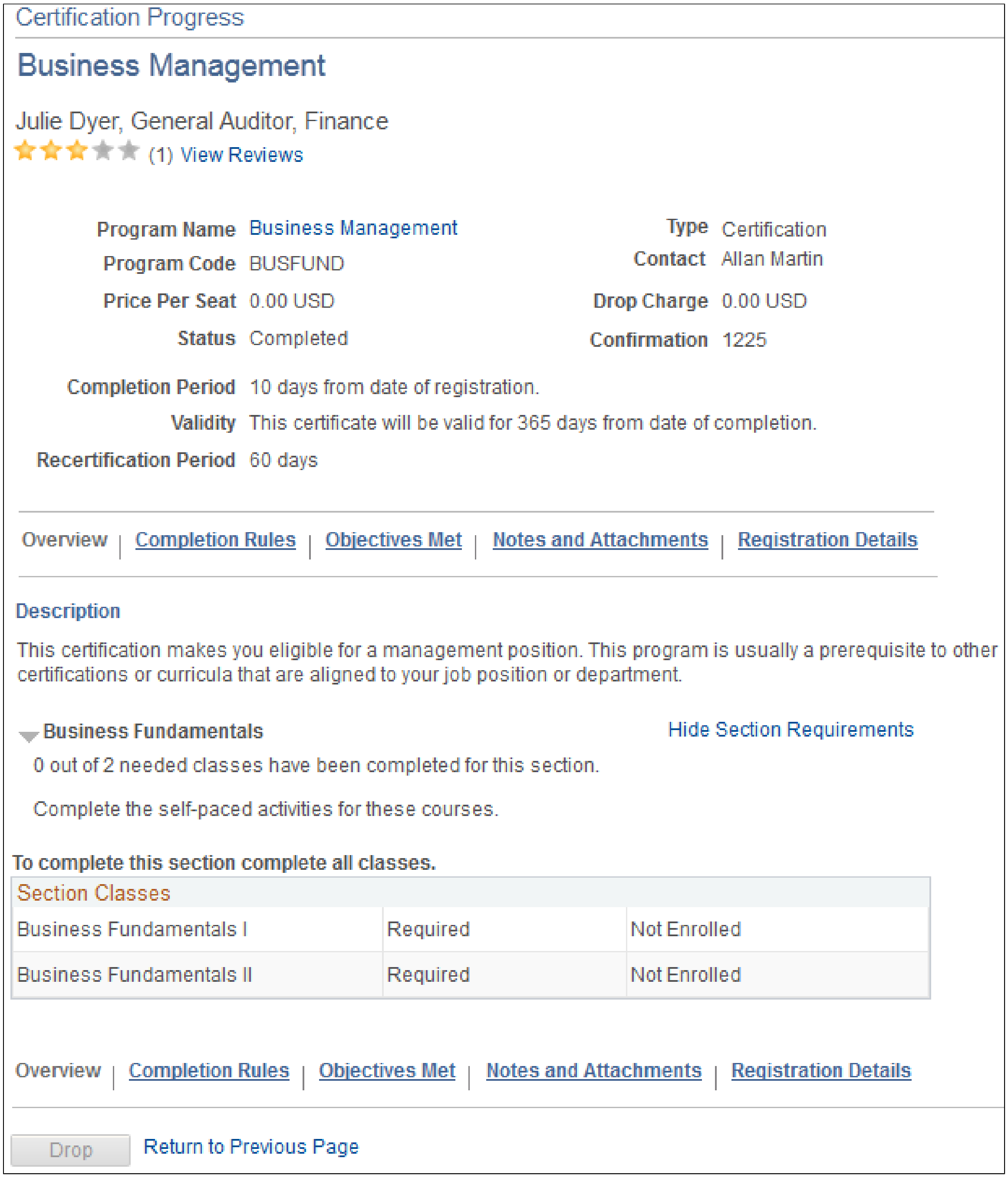
Certification Progress Page

Use the Certification Progress or Curriculum Progress page (LM_PRG_PROGRESS) to view section requirements and the learner's progress.

Navigation:

Click the Learner Progress link the View Certification Roster (learner details) page or the View Curriculum Roster (learner details) page.

This example illustrates the fields and controls on the Certification Progress page.



Use the links on this page to view additional information about the program, including its completion rules, objectives, notes and attachments, and registration details.

Overview

This is the section of the page that displays when you first access it. For each section of the program, you can see whether each item is required or optional and view the learner's enrollment status.

Completion Rules

Click the Completion Rules link to view the section completion rules for the program.

Objectives Met

Click the Objectives Met to view the objectives that will be met by completing the program.

Notes and Attachments

Click the Notes and Attachments link to view any notes or attachments associated with the program.

Registration Details

Click this link to view the programs registration details such as expiration information, payment details, and chargeback information.

Note: When a learner is currently enrolled in a certification that the learner has already completed, the following message displays in the Expiration Information group box: "Certification is currently In Progress. Expiration Information displayed above is for the previously completed Certification."

Viewing and Managing Learner Transcripts

Administrators can use the View All Learning (LM_ADMIN_LEARNING) component to view a listing of the classes, programs, supplemental learning, and learning requests associated with any learner in the system. To perform a more focused search, the administrator can select any of the search filters that have been defined for your organization through the Learning Filters (LM_FILTER) component.

Pages Used to View and Manage Learner Transcripts

Page Name	***Definition Name***	***Usage***
My Learning - Find Learners Page	LM_ADM_FND_LRNR	Search for and select the learner whose transcript you want to review.
Learner View Page	LM_MGR_GRP_CURNT	View and manage a listing of the learning associated with the learner.

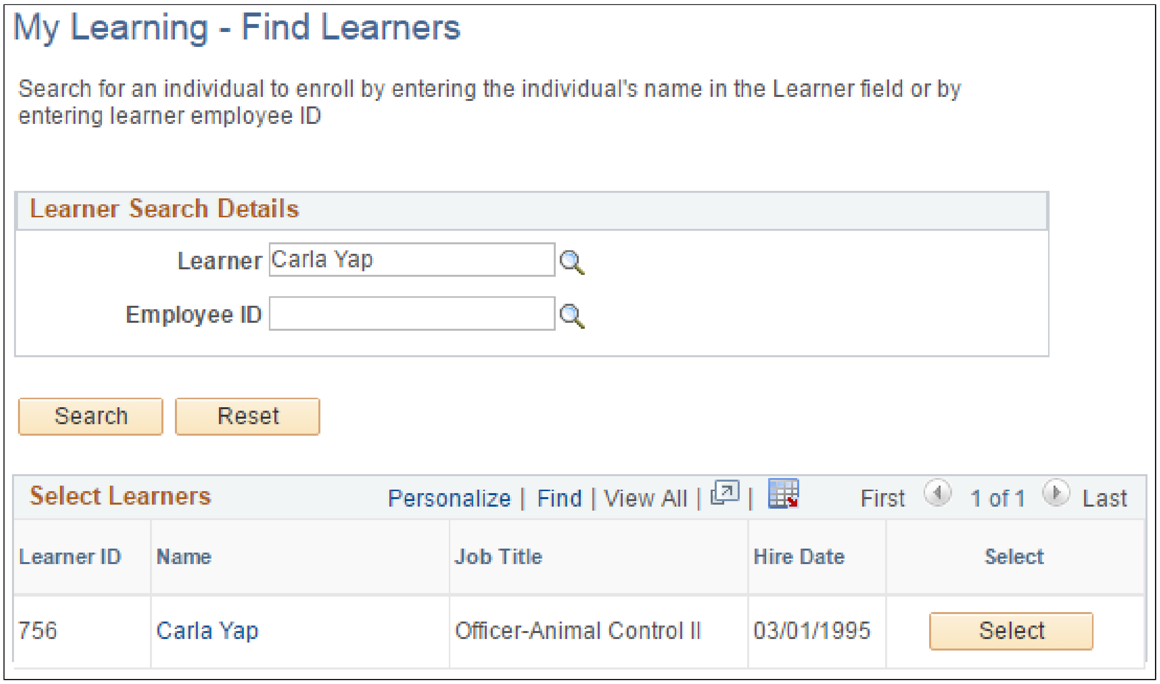
My Learning - Find Learners Page

Use the My Learning - Find Learners page (LM_ADM_FND_LRNR) to search for and select the learner whose transcript you want to review.

Navigation:

Enterprise Learning > **Learner Tasks** > **View All Learning**

This example illustrates the fields and controls on the My Learning - Find Learners page.



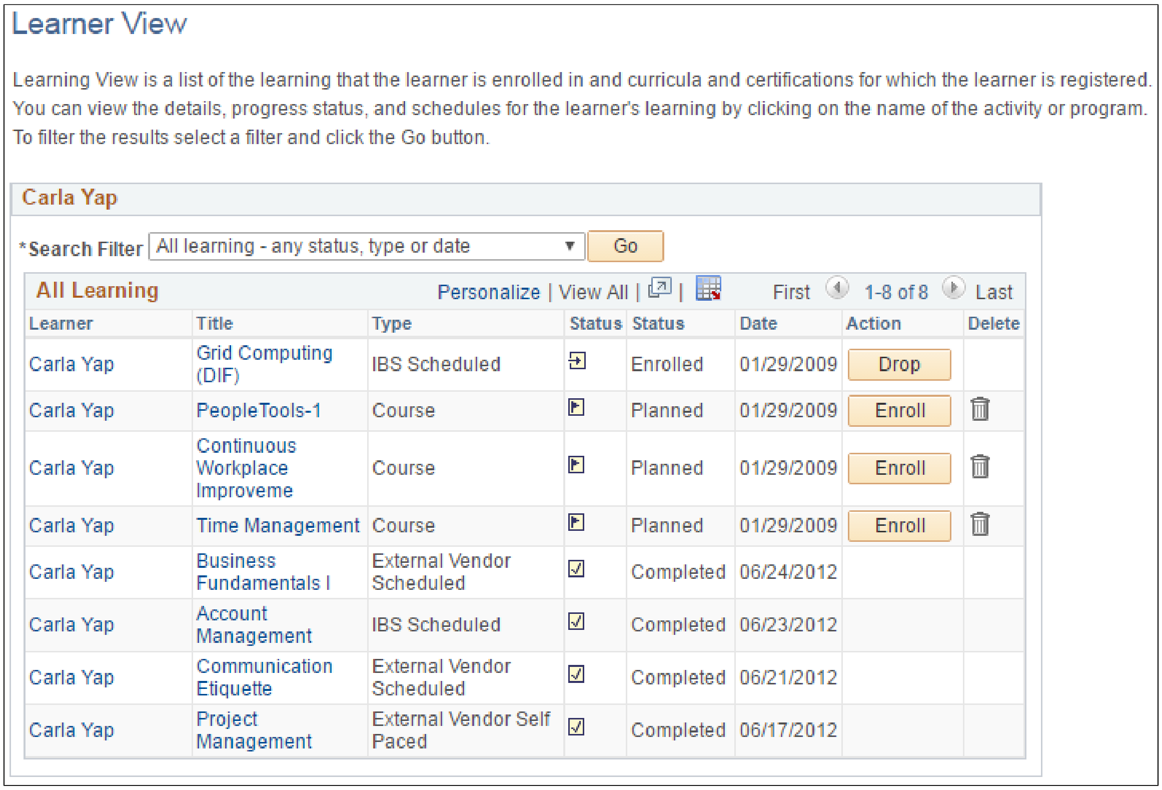
Learner View Page

Use the Learner View page (LM_MGR_GRP_CURNT) to view and manage a listing of the learning associated with the learner.

Navigation:

Click the Select button for a learner on the My Learning - Find Learners page.

This example illustrates the fields and controls on the Learner View page.



Field or Control	***Description***
Search Filter	Select a filter to display only those records that meet a predefined set of criteria.
Learner	Click to view detailed information about the learner.
Title	Click to view detailed information about the learning.
Action	Click the button in this column to take the specified action on the learning.

Related Links

Defining Search Filters

Approving Enrollment and Registration Requests

Pages Used to Approve Enrollment and Registration Requests

Page Name	***Definition Name***	***Usage***
Monitor Approvals Page	EOAW_ADM_MON_SRC	Administrator searches for approval requests meeting specific search criteria.
Monitor Approvals - Administrator Actions Page	EOAW_ADM_MON_ACT	Administrator acts on pending approvals.
Maintain Approvals Page	LM_PEN_TRN_REQ	Maintain class, program, and supplemental learning records that require approval.
Maintain Approvals - Enrollment Details Page	LM_APPRVL_DTLS_SS	Managers and other users review the approval path for a class request, view any comments, and submit, approve, deny, or push back the request.
Maintain Approvals - Program Registration Details Page	LM_REG_APRV_DTL_SS	Managers and other users review the approval path for a program request, view any comments, and submit, approve, deny, or push back the request.
Maintain Approvals - Supplemental Learning Page	LM_SUP_APRV_DTL_SS	Managers and other users review the approval path for a supplemental learning request, view any comments, and submit, approve, deny, or push back the request.

Understanding Approvals

PeopleSoft provides different components for approving learning requests based on the approver's role and their need for approval information:

- Monitor Approvals (SAC_AW_ADMIN_MON)

  This is an administrator component and is available to users whose role includes the permission list LMLELM6300. It enables administrators to search and view all pending, complete, denied, initial, inactive, suspended, and terminated approvals in their own domain as well as in the domain of other system users. Administrators can view a graphic illustration of each approval path and take action on pending approvals by submitting, approving, denying, or pushing back their own and others' approval requests, and by transferring approval rights from one designated approver to another. The administrator can also insert additional approvers or reviewers at any point in the approval path, or start a new approval path.

- Maintain Approvals (LM_ADM_TRN_REQ)

The Maintain Approvals component is designed for special approvers, owners of training unit pools, and any other approvers in addition to administrators and managers. Administrators typically use the Monitor Approvals component and managers use the self-service Team Members component for approvals. The Maintain Approvals component enables special approvers to view enrollment or registration requests submitted by their direct reports, and to submit, approve, deny, or push back the requests. They can also use this component to insert additional approvers or reviewers at any point in the approval path.

This component can also be accessed by learning administrators acting as special approvers. And if a learner is paying by training unit or purchase order, the owner of the training units or purchase order can access this component to deny or approve the learning request.

Note: Identify users as special approvers on the Maintain Classes (LM_ACT), Maintain Programs (LM_PROG), and Define Supplemental Learning (LM_ADHC_SETUP) components.

- Team Members (LM_SS_MANAGER_UI)

  This is a self-service component for managers. It enables managers to view enrollment or registration requests submitted by their own team members or the direct reports of their immediate team members, and to approve, deny, or push back learning requests.

  Note: We discuss this component in the self-service documentation.

  See Team Members Page.

- Administer Class Rosters (LM_ROSTER)

  This is an administrator component. It enables administrators to view class enrollment requests and to approve or deny the requests.

  Note: We discuss this component elsewhere in this documentation.

  See Administering Enrollment-Related Tasks.

- Administer Program Rosters (LM_PRG_RSTR_ADMIN)

  This is an administrator component. It enables administrators to view program registration requests and to approve or deny the requests.

  Note: We discuss this component elsewhere in this documentation.

  See Administering Registration-Related Tasks.

Note: Enrollment, registration, and supplemental learning requests are not automatically routed for approval. You must set up the approval steps for specific courses, classes, programs, and supplemental learning to trigger approval workflow.

See Understanding the Approval Framework.

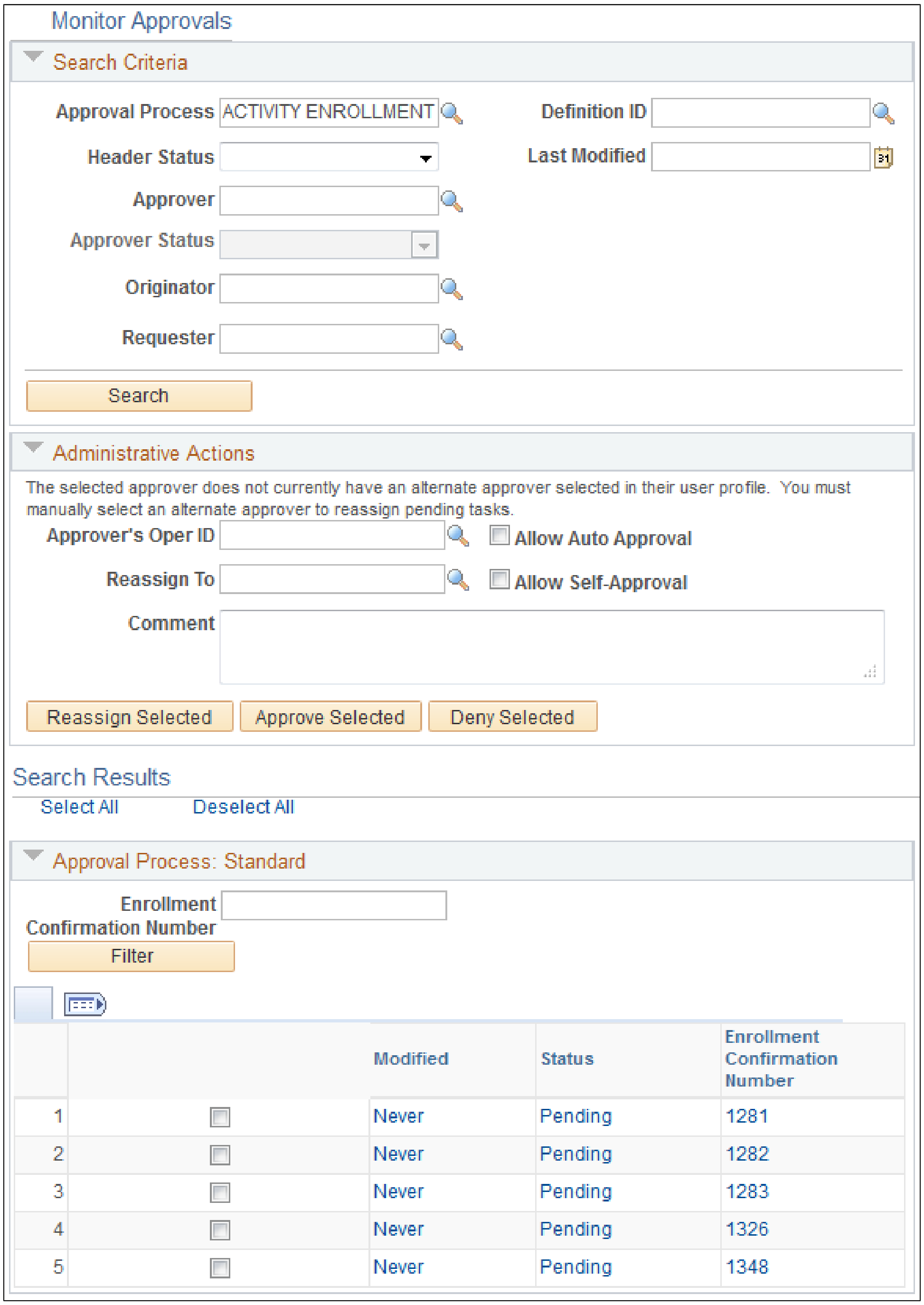
Monitor Approvals Page

Use the Monitor Approvals page (EOAW_ADM_MON_SRC) to administrator acts on pending approvals.

Navigation:

Enterprise Learning > **Learner Tasks** > **Monitor Approvals**

This example illustrates the fields and controls on the Monitor Approvals page.



Search Criteria

Use the fields in the Search Criteria group box to locate approval records using the following filters:

- Approval Process

  Note: You define approval process definitions using the Process (EOAW_PRCS) component.

  See Understanding the Approval Framework.

- Definition ID
- Header Status
- Last Modified
- Approver
- Approver Status
- Status of the Approval Request
- Originator
- Requester

Search Results

The system displays the class, program, and supplemental learning requests meeting the criteria specified in the Search Criteria group box. Click the links in the Search Results group box to view the details of a learning request, view a graphic illustration of each approval path, and take action on pending approvals.

Note: Users must have the role LMLELM_Learning_Env_Admin to be able to see any data in the search results on this page.

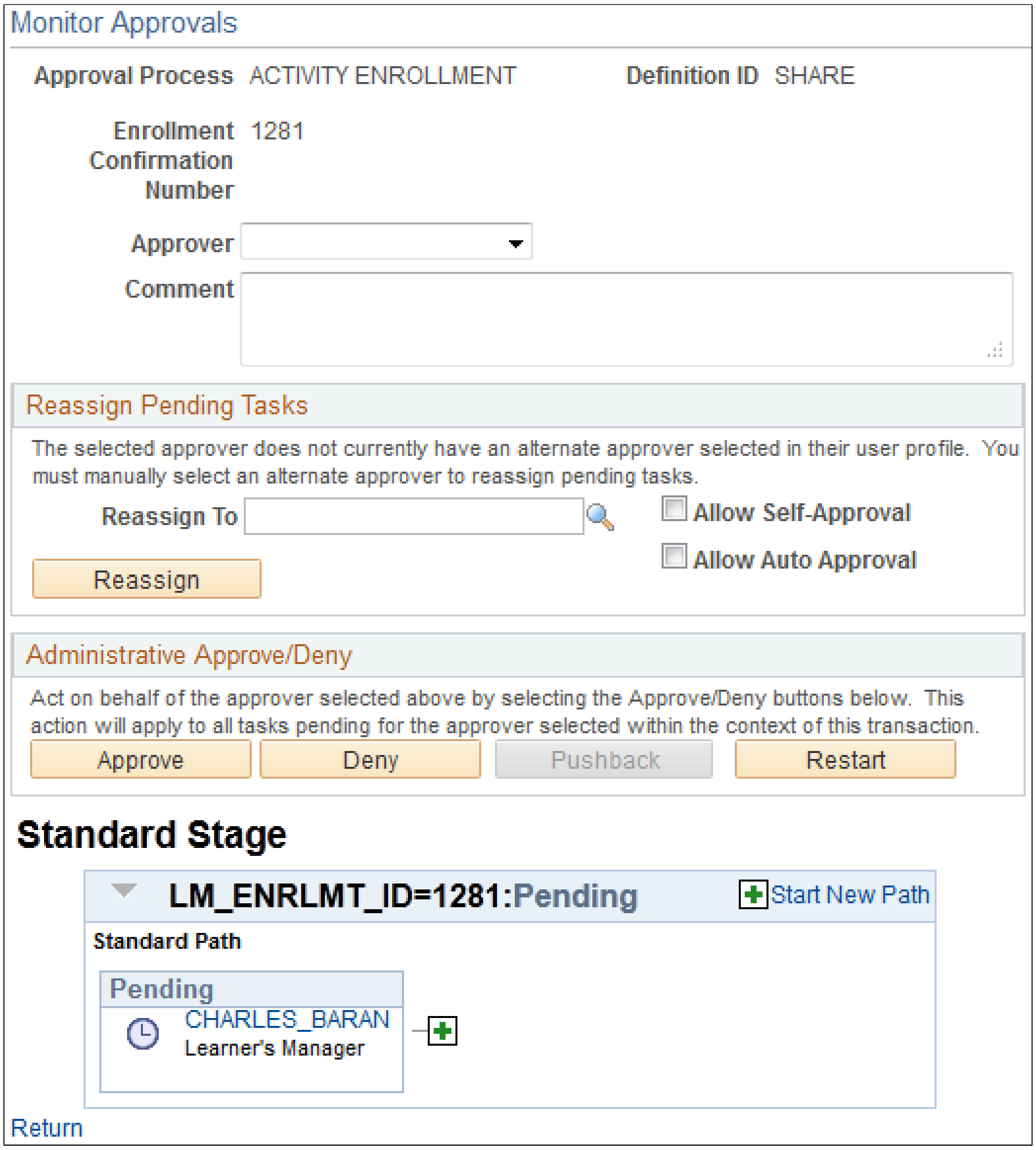
Monitor Approvals - Administrator Actions Page

Use the Monitor Approvals - Administrator Actions page (EOAW_ADM_MON_ACT) to act on pending approvals.

Navigation:

Click on a class, program, or supplemental learning link on the Monitor Approvals page.

This example illustrates the fields and controls on the Monitor Approvals page.



Use the fields on this page to submit, approve, deny, or push back approval requests. This page also enables you to transfer approval authority from one user to another, insert additional approvers or reviewers at any point in the approval path, or start a new approval path.

Note: You define approval paths using the Process (EOAW_PRCS) component.

See Understanding the Approval Framework.

Reassign Pending Tasks

Field or Control	*Description*
Reassign To	Enter the User ID of the user to whom you are reassigning the approval task.

Field or Control	*Description*
Allow Auto Approval	A user may participate more than once in the same approval process. Select **Allow Auto Approval** to enable the system to remember the new (substitute) approver's initial actions in an approval process. The next time this user is asked to take an action in the process, the system automatically reproduces the user's earlier actions. The system continues to reproduce these actions until you deselect the **Allow Auto Approval** check box.
Allow Self-Approval	If the new (substitute) approver is also the originator of the learning request, select **Self Approval** to instruct the system to automatically approve the request for the new user. If self-approval is not enabled, the system does not consider the requester an approver for the transaction.

Administrative Approve Deny

Field or Control	*Description*
Approve	Click to enter an *approval* action on behalf of the user identified in the **Approver's Oper ID** field for the class, program, or supplemental learning request. This action applies to all of the user's tasks in the approval process for the learning request.
Deny	Click to enter a *deny* action on behalf of the user identified in the **Approver's Oper ID** field for the class, program, or supplemental learning request. This action applies to all of the user's tasks in the approval process for the learning request.
Comment	Add a comment to explain the action you have taken.

Standard Stage

View a graphic display of the approval path for the selected class, program, or supplemental learning request. Click the *Plus* signs to add additional approvers or reviewers to the path, or to start a new path.

Maintain Approvals Page

Use the Maintain Approvals page (LM_PEN_TRN_REQ) maintain class, program, and supplemental learning records that require approval.

Navigation:

Enterprise Learning > **Learner Tasks** > **Maintain Approvals**

This example illustrates the fields and controls on the Maintain Approvals page.

Field or Control	***Description***
Approve	Click to approve a learner's enrollment or registration request. The Learning Approvals - Approve Enrollment page appears and the system does not require any further action. For approved enrollments, the system sets the enrollment status of the learner to enrolled or waitlisted, depending on whether the class is full. The enrollment status does not change if the class and waitlist are both full, or if the class is full and there is no waitlist enabled. For approved registrations, the system sets the registration status of the learner to registered. The system also generates an email informing the learner of the updated enrollment or registration status. **Note:** We discuss the Learning Approvals - Approve Enrollment page in the documentation on self-service transactions. See Maintaining Learning Records and Objectives Using Manager Self Service.
Deny	Click to deny a learner's enrollment or registration request. The Learning Approvals - Deny Enrollment page appears, where you must click **Continue** to confirm that you want to deny approval. The Learning Approvals - Deny Enrollment Confirmation page appears and the system does not require any further action. For denied class enrollments and program registrations, the system sets the learner's enrollment or registration status to dropped. The system also generates an email informing the learner of the updated enrollment or registration status. **Note:** We discuss the Learning Approvals - Deny Enrollment and Learning Approvals - Deny Enrollment Confirmation pages in the documentation on self-service transactions. See Maintaining Learning Records and Objectives Using Manager Self Service.

Related Links

Enrollment Workflow Notifications

Curricula and Certification Workflow Notifications

Maintain Approvals - Enrollment Details Page

Use the Maintain Approvals - Enrollment Details page (LM_APPRVL_DTLS_SS) to managers and other users review the approval path for a class request, view any comments, and submit, approve, deny, or push back the request.

Navigation:

Click the **Details** link on the Maintain Approvals page for a class.

Click **Approve, Deny, Pushback,** or **Submit** to process the learning request.

Status

View the status of the class request.

Standard Stage

Review the approval path for the learning request, add additional approvers or reviewers to the path, or start a new approval path.

Comment

Enter comments related to the approval or denial of the request.

Maintain Approvals - Program Registration Details Page

Use the Maintain Approvals - Program Registration Details page (LM_REG_APRV_DTL_SS) to managers and other users review the approval path for a program request, view any comments, and submit, approve, deny, or push back the request.

Navigation:

Click the **Details** link on the Maintain Approvals page for a curriculum or certification program.

Click **Approve, Deny, Pushback,** or **Submit** to process the learning request.

Status

View the status of the program request.

Standard Stage

Review the approval path for the learning request, add additional approvers or reviewers to the path, or start a new approval path.

Comment

Enter comments related to the approval or denial of the request.

Maintain Approvals - Supplemental Learning Page

Use the Maintain Approvals - Supplemental Learning page (LM_SUP_APRV_DTL_SS) to managers and other users review the approval path for a supplemental learning request, view any comments, and submit, approve, deny, or push back the request.

Navigation:

Click the **Details** link on the Maintain Approvals page for a supplemental class.

Click **Approve, Deny, Pushback,** or **Submit** to process the learning request.

Status

View the status of the supplemental learning request.

Standard Stage

Review the approval path for the learning request, add additional approvers or reviewers to the path, or start a new approval path.

Comment

Enter comments related to the approval or denial of the request.

Sending Enrollment, Registration, and Waitlist Notifications

Pages Used to Send Enrollment, Registration, and Waitlist Notifications

Page Name	***Definition Name***	***Usage***
Enrollment Notifications Page	LM_NOTIFY_RUNCTL	Send enrollment and registration notifications.
Run Waitlist Notifications Page	LM_WLT_TRHLD_NOTIF	Run the LM_WLT_TRHLD process to notify administrators of class waitlist thresholds that have been met.

Understanding Enrollment, Registration, and Waitlist Notifications

Use the Enrollment Notifications (LM_NOTIFY) Application Engine process to send class and program notification emails for enrollment and registration status updates. When there is a change in a learner's enrollment or registration status for a class or program, the system automatically generates a class or program notification that alerts the appropriate users of the change. These notification emails get queued in the system. You must run the Enrollment Notifications process to send these notifications.

Important! You should schedule the Enrollment Notifications process to run at least once daily.

Use the Waitlist Threshold Application Engine process (LM_WLT_TRHLD) to send the Waitlist Threshold Met notification to administrators when the number of waitlisted learners for a given class meets the waitlist threshold defined for that class. The system sends the notification to the administrators of the primary learning environment that is associated with the class.

Related Links

Enrollment Workflow Notifications
Curricula and Certification Workflow Notifications
Sending Program Notifications

Using HTML Email Approvals with ELM Transactions

Understanding HTML Email Approvals

The PeopleSoft Approval Framework enables you to take action on approval requests directly from an email (for example, approve, deny, or pushback).

The HTML Email Approval feature delivers HTML email templates for key PeopleSoft Enterprise Learning Management transactions. This table lists these transactions along with their corresponding process IDs:

Transaction	***Transaction Process IDs***
Class Enrollment	• ACT BOTH-SPECIAL • ACT INT-MGR EXT-NONE • ACT INT-MGR EXT-PAYADMN • ACT INT-MGR EXT-SPECIAL • ACT INT-NONE EXT-PAYADMN • ACT INT-NONE EXT-SPECIAL • ACT INT-SPECIAL EXT-NONE • ACT INT-SPECIAL EXT-PAYADMN • ACTIVITY ENROLLMENT

Transaction	***Transaction Process IDs***
Program Registration	• PRG BOTH-SPECIAL • PRG INT-MGR EXT-NONE • PRG INT-MGR EXT-PAYADMN • PRG INT-MGR EXT-SPECIAL • PRG INT-NONE EXT-PAYADMN • PRG INT-NONE EXT-SPECIAL • PRG INT-SPECIAL EXT-NONE • PRG INT-SPECIAL EXT-PAYADMN • PROGRAM REGISTRATION
Supplemental Learning	• SUP BOTH-LEARNER SELECTED • SUP BOTH-SPECIAL • SUP INT-LRNRSEL EXT-NONE • SUP INT-LRNRSEL EXT-SPECIAL • SUP INT-MGR EXT-LRNRSEL • SUP INT-MGR EXT-NONE • SUP INT-MGR EXT-SPECIAL • SUP INT-NONE EXT-LRNRSEL • SUP INT-NONE EXT-SPECIAL • SUP INT-SPECIAL EXT-LRNRSEL • SUP INT-SPECIAL EXT-NONE • SUPPLEMENTAL LEARNING

Note: This feature is dependent on the Approvals Framework delivered by Enterprise Components. For more information on setting up the Approval Framework for PeopleSoft ELM, see Understanding the Approval Framework.

Configuring HTML Email Approvals

The Approval Framework supports HTML email approvals as delivered. However, after the framework is enabled, you need to perform the following steps to ensure that your system uses this functionality according to your business needs:

1. Use the “URL Maintenance Page” (Approval Framework) to define the URL of the application server associated with the HTML_EMAIL_APPROVAL URL identifier.

2. Select the **Use Email Approvals** check box on the “Register Transactions Page” (Approval Framework) to enable HTML email approvals for the process IDs associated with your ELM transactions.

3. Use the Edit Template button on the “Configure Transactions Page” (Approval Framework) to review the template associated with a process ID and, if necessary, modify it to meet your business requirements.

4. Set up the EOAWEMC Application Engine process to run periodically to process the approval action emails sent by approvers.

   The EOAWEMC process updates the approval status for the approver(s) and routes the approval request to the next person in the approval chain, if applicable. We recommend that you add a recurrence to the process to have it run as often as necessary so that approval responses are handled in a timely manner. For more information on the EOAWEMC process, see “Scheduling the Application Engine Program EOAWEMC” (Approval Framework).

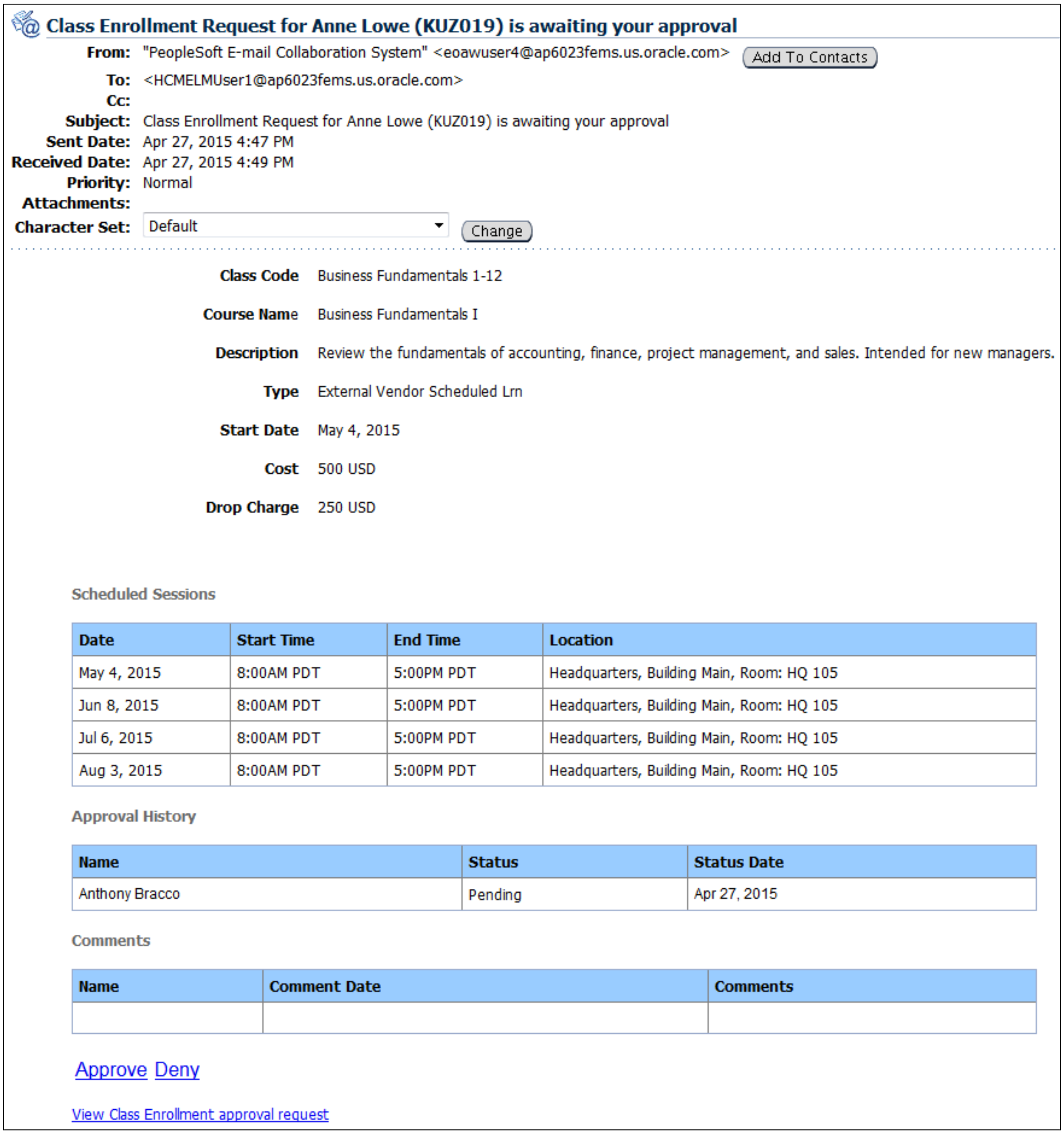
Related Links

“Triggering Email Collaboration” (Approval Framework)

Working with HTML Approval Emails

For each transaction submitted for approval, the system generates an email and sends it to the appropriate approver. The email contains detailed information about the transaction request. An approver can take action directly from the email by clicking a link, such as Approve, Deny, or Pushback, to generate a reply to the request. The email displays requestor comments and approval history. In addition, if the approver needs further details or information, the email provides a link that enables her to view the approval request in PIA.

This is an example of an HTML approval email for a class enrollment.



Class Enrollment Request for Anne Lowe (KUZ019) is awaiting your approval

From: "PeopleSoft E-mail Collaboration System" <eoawuser4@ap6023fems.us.oracle.com> Add To Contacts
To: <HCMELMUser1@ap6023fems.us.oracle.com>
Cc:
Subject: Class Enrollment Request for Anne Lowe (KUZ019) is awaiting your approval
Sent Date: Apr 27, 2015 4:47 PM
Received Date: Apr 27, 2015 4:49 PM
Priority: Normal
Attachments:
Character Set: Default Change

Class Code Business Fundamentals 1-12

Course Name Business Fundamentals I

Description Review the fundamentals of accounting, finance, project management, and sales. Intended for new managers.

Type External Vendor Scheduled Lrn

Start Date May 4, 2015

Cost 500 USD

Drop Charge 250 USD

Scheduled Sessions

Date	Start Time	End Time	Location
May 4, 2015	8:00AM PDT	5:00PM PDT	Headquarters, Building Main, Room: HQ 105
Jun 8, 2015	8:00AM PDT	5:00PM PDT	Headquarters, Building Main, Room: HQ 105
Jul 6, 2015	8:00AM PDT	5:00PM PDT	Headquarters, Building Main, Room: HQ 105
Aug 3, 2015	8:00AM PDT	5:00PM PDT	Headquarters, Building Main, Room: HQ 105

Approval History

Name	Status	Status Date
Anthony Bracco	Pending	Apr 27, 2015

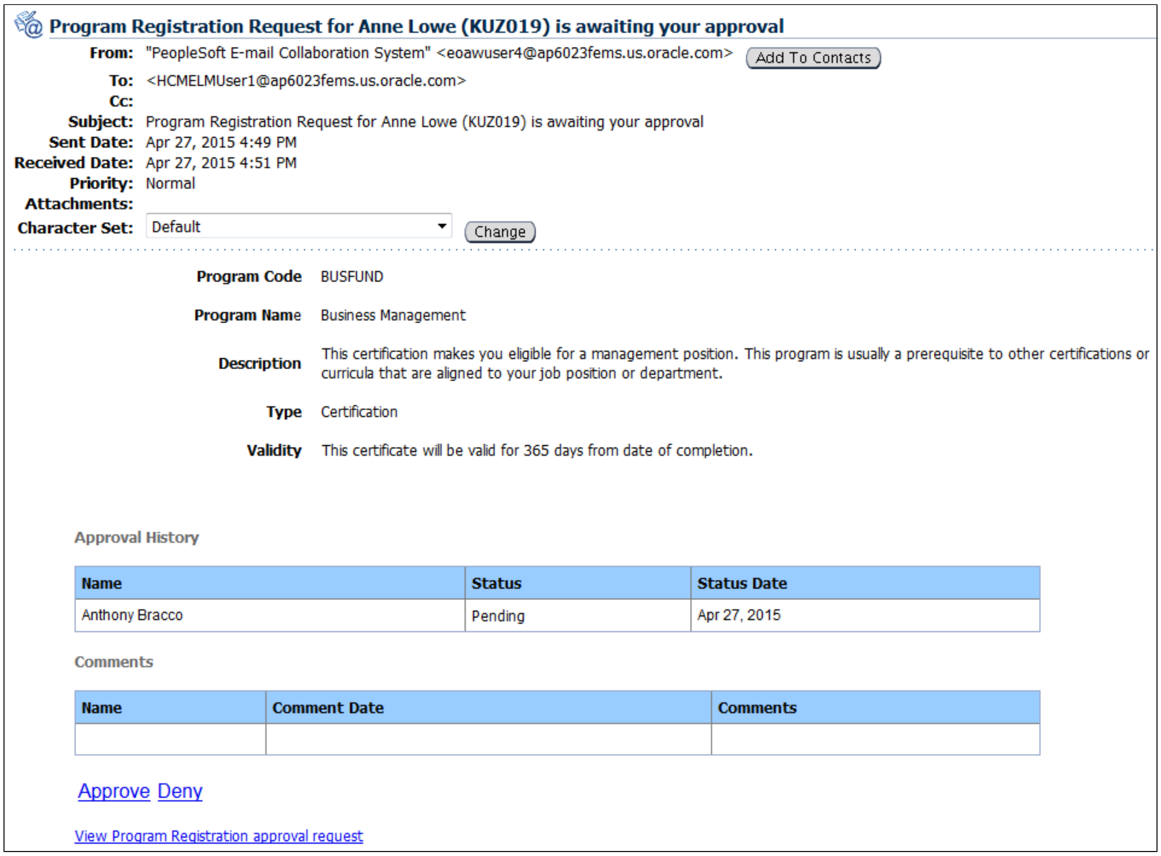
Comments

Name	Comment Date	Comments

Approve Deny

View Class Enrollment approval request

This is an example of an HTML approval email for a program registration.



Program Registration Request for Anne Lowe (KUZ019) is awaiting your approval

From: "PeopleSoft E-mail Collaboration System" <eoawuser4@ap6023fems.us.oracle.com> Add To Contacts
To: <HCMELMUser1@ap6023fems.us.oracle.com>
Cc:
Subject: Program Registration Request for Anne Lowe (KUZ019) is awaiting your approval
Sent Date: Apr 27, 2015 4:49 PM
Received Date: Apr 27, 2015 4:51 PM
Priority: Normal
Attachments:
Character Set: Default Change

Program Code BUSFUND

Program Name Business Management

Description This certification makes you eligible for a management position. This program is usually a prerequisite to other certifications or curricula that are aligned to your job position or department.

Type Certification

Validity This certificate will be valid for 365 days from date of completion.

Approval History

Name	Status	Status Date
Anthony Bracco	Pending	Apr 27, 2015

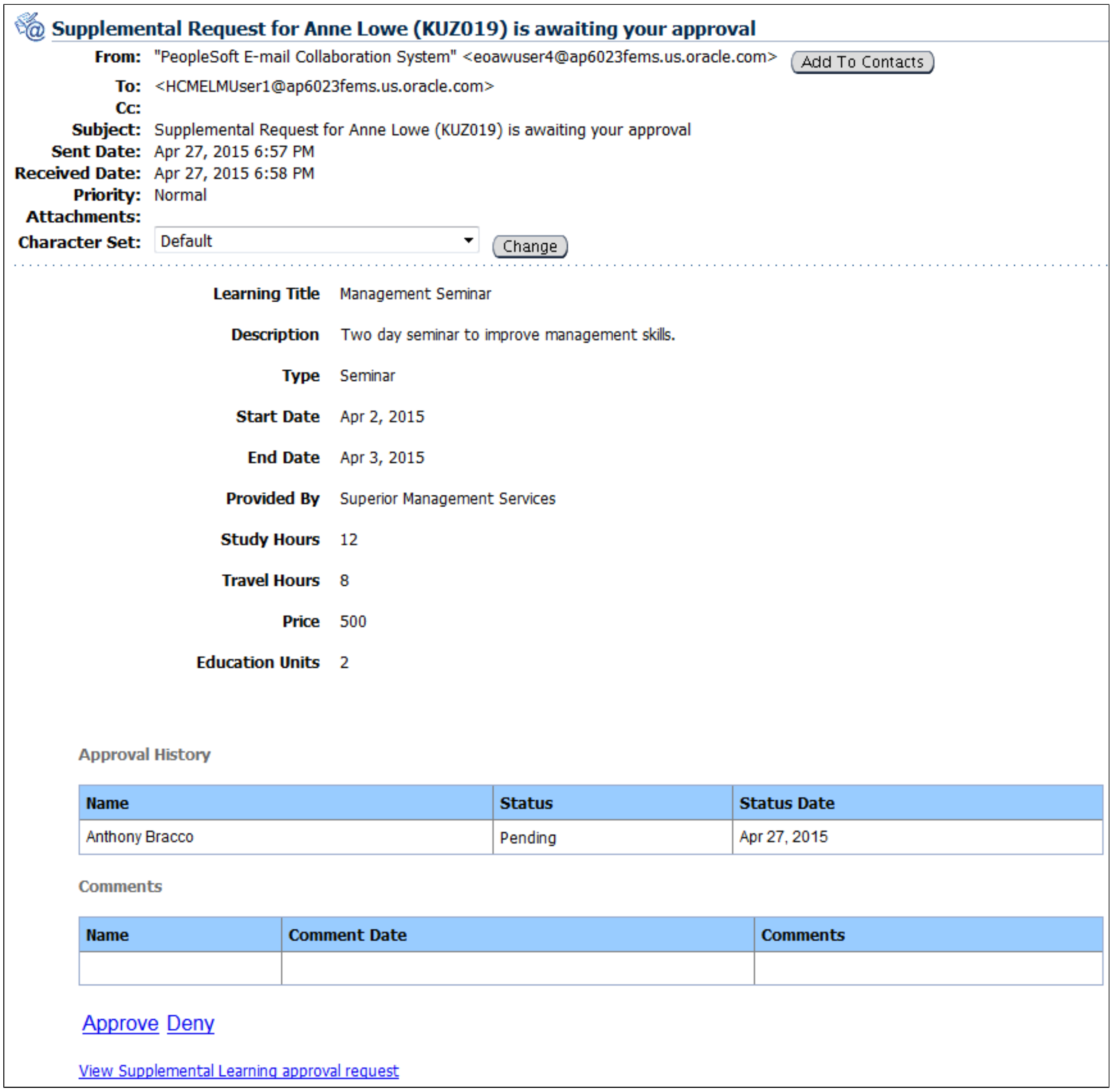
Comments

Name	Comment Date	Comments

Approve Deny

View Program Registration approval request

This is an example of an HTML approval email for a supplemental learning request.



Information Displayed for Classroom Enrollment Approval Emails

The summary section of the email displays the following information for the class:

Field	***Derived From***
Class Code	Class Code field on the Maintain Classes - Class Details Page
Course Name	Course Long Name field on the Course Details: Basic Data Page
Description	Description field on the Course Details: Basic Data Page

Field	***Derived From***
Type (delivery method)	Delivery Method field on the Maintain Classes - Class Details Page
Start Date	1. The first scheduled session date less than or equal to the current date if a scheduled session exists 2. The Start Date field on the Maintain Classes - Class Details Page if there are no scheduled sessions
End Date	The End Date field on the Maintain Classes - Class Details Page
Duration	Days, Hours, and Minutes fields on the Maintain Classes - Class Details Page
Cost	For internal learners, Internal Price field For external learners, External Price field Currency derived from the Currency field All three fields are located on the Maintain Classes - Class Details Page.
Drop Charge	For internal learners, Internal Price Drop field For external learners, External Price Drop field Currency derived from the Currency field All three fields are located on the Maintain Classes - Class Details Page.

Note: If any of these parameters are not defined for a class, they are not displayed in the email. For more information on defining class details, see Understanding Management of Classes.

The Scheduled Sessions grid lists all of the scheduled sessions for the class being requested. For each session, the page displays:

Field	***Derived From***
Start Date	Date field defined on the Session Details Page.
Start Time	Start Time field defined on the Session Details Page.

Field	***Derived From***
End Time	End Time field defined on the Session Details Page.
Location	Combines the following three fields, concatenated: 1. Facility field defined for the session on the Session Details Page 2. Building Name associated to the selected room on the Room Detail Page 3. Room field defined for the session on the Session Details Page

If there are no scheduled sessions for the class being requested, this section does not appear on the page. For more information on scheduling sessions, see Understanding Sessions, Webcasts, and Assignments.

Information Displayed for Program Registration Approval Emails

The summary section of the email displays the following information for the program:

Field	***Derived From***
Program Code	Certification Code or Curriculum Code field on the Maintain Programs - Details Page
Program Name	Long Name field on the Maintain Programs - Details Page
Description	Description field on the Maintain Programs - Details Page
Type (*Certification* or *Curriculum*)	Program type selected when the program is created
Validity	Validity Period field on the Maintain Programs - Details Page **Note:** The Validity field appears only for certifications that have a validity period defined.

For more information about defining program details, see Defining Programs.

Information Displayed for Supplemental Learning Approval Emails

The summary section of the email can display the following information for the supplemental learning:

- Title

- Description
- Start Date
- End Date
- Institution
- Location
- Provided By
- Supervised By
- Travel Hours
- Study Hours
- Currency Code
- Education Units
- Price
- Free Field One
- Free Field Two
- Free Field Three
- Free Field Four
- Instructions

All of these fields are derived from their counterpart on the Supplemental Learning: General Attributes Page. A field appears in the email only if both of the following are true:

1. The field is defined for the supplemental learning.
2. The Display check box is selected for the field on the Define Supplemental Learning - Details Page.

For more information on supplemental learning, see Understanding Supplemental Learning.

Approval History Grid

This grid appears for all ELM transactions. It displays the name of the current approver with a status of *Pending*. It also lists approvers that have already responded to the transaction. This grid does not show the approval chain, which consists of approvers that are in the queue to approve.

Comments Grid

This grid appears for all ELM transactions. displays any comments entered by approvers.

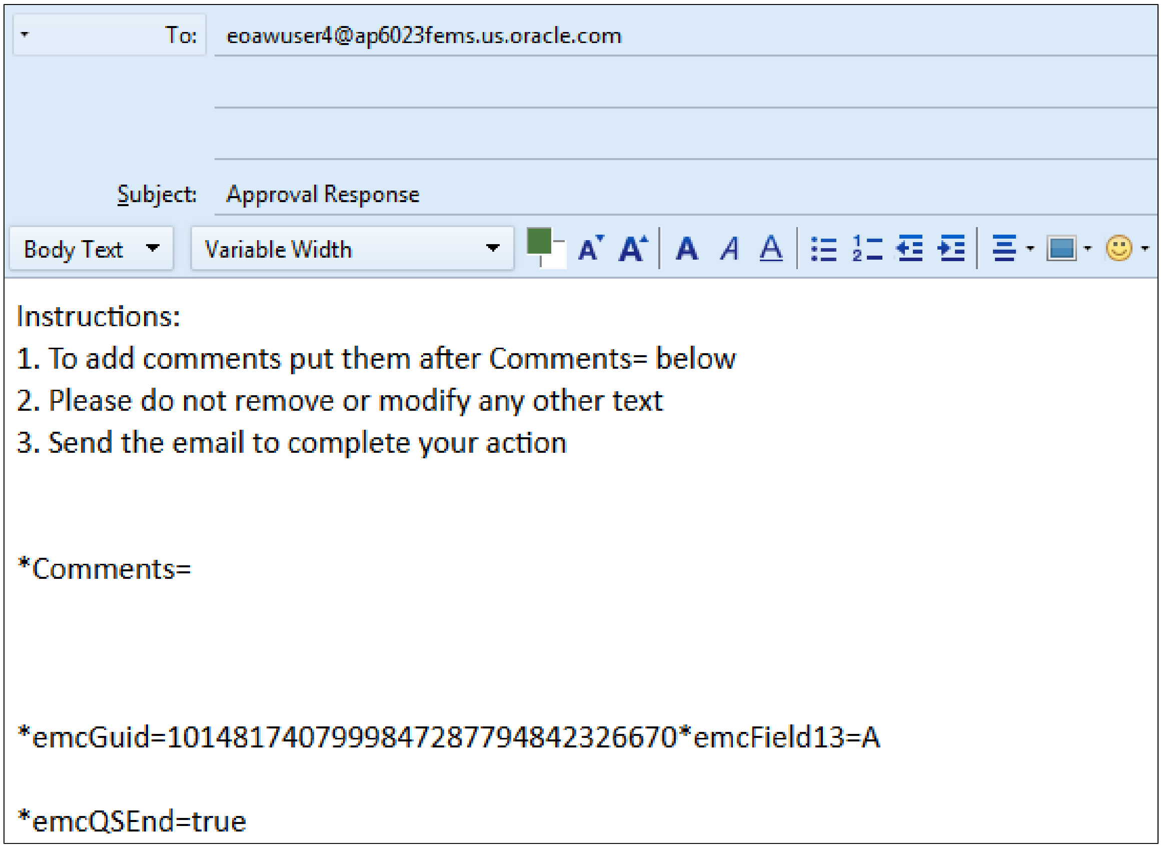
Responding to an Approval Request

The approver can act upon an approval request by selecting the appropriate action link that appears at the bottom of the email: **Approve**, **Deny**, or **Pushback**.

Upon selecting an action, a response email opens in the approver's default email client. The email includes text to instruct the approver where to enter any comments.

Note: The Push Back link does not appear for first-level approvers.

This is an example of an email that is generated when you click an action link in an HTML approval email.



The approver can enter comments after the *Comments* text, but this is not a requirement.

Note: Approvers should not remove or modify any other identifiers or text from the response email.

After the approver sends the response email, the system updates the approval status of the associated request the next time it runs the EOAWEMC Application Engine process.

Chapter 27

Tracking Enrollment and Registration Fees

Understanding the Data Export Process

This topic lists prerequisites and discusses the data export process.

Prerequisites

Before transmitting transactions to financials, you must:

- Create subledger groups.

  See Subledger Page.

- Define subledger update options.

  See Subledger Update Options Page.

- Set up payment methods.

  See Understanding Payment Method Setup.

- Enroll learners in classes or register learners in programs that have associated fees.

  See Understanding Enrollment and Registration.

Data Export Process

Enterprise Learning Management enables you to track chargeback and revenue transactions. Chargeback transactions include transactions where a balance from one internal account is moved to another internal account. Chargebacks are primarily used by internal learners (employees). Revenue transactions include any transactions that generate revenue. Revenue based methods of payment include cash, checks, credit cards, purchase orders, and training units.

The system posts chargeback and revenue transactions that meet specific criteria to an Enterprise Learning Management subledger. You can update transactions posted to the subledger as often as necessary to ensure accurate transaction data in the subledger. For example, if a learner drops a class after the enrollment was already written to the subledger, you can update the subledger with a new entry for the drop. In this case, the new transaction would indicate either no charge for the enrollment fee, or would be a drop fee.

After you post transactions to a subledger you can export the internal transactions to the general ledger in the financials system. The system exports only chargeback transactions to the general ledger. The system does not export revenue transactions. Enterprise Learning Management provides several reports that you can use to track revenue transactions and bill customer organizations.

The process by which you export chargeback transactions to the general ledger varies, depending on whether you integrate with PeopleSoft Enterprise Financials or a third-party financials system. If you integrate with Enterprise Financials, the system exports transactions from a subledger in Enterprise Learning Management to the Financial Management Accounting Entry tables, where they are formatted according to a journal template that you specify. PeopleSoft Journal Generator then processes the data in the Accounting Entry tables to create journal entries before posting them to Enterprise General Ledger. Journal Generator validates all data in the tables, including combination editing rules, and determines which accounting calendar to use based on the accounting date that you specify in Enterprise Learning Management. Journal Generator tables store journal entries as Header and Journal Lines to facilitate control of processing and posting to the General Ledger and to provide complete and ready accessibility to an audit trail. After the subledger information is successfully exported , General Ledger sends a message back to Enterprise Learning Management, which updates the transactions in the subledger with the journal ID and journal date.

If you integrate with a third-party financials system, the system still utilizes the subledger tables in Enterprise Learning Management. However, you must create a process for how chargeback transactions are moved into the general ledger in the financials system.

Posting Transactions to the Subledger

Page Used to Post Transactions to the Subledger

Page Name	***Definition Name***	***Usage***
Process Payment Details Page	LM_RUNCTL_FI_ENRL	Post enrollment and registration transactions to a subledger.

Understanding the Transaction Table

The system stores all financial transactions for enrollment and registration transactions in the Transaction table (LM_ENRLMT_PYMT). Payment information includes the class or program fee or drop charge, as well as details about the payment method. This includes chargeback, training unit pool, purchase order, credit card, cash, or check information.

Each time payment information for an enrollment or registration record is updated, the system adds a new row to the Transaction table . The Transaction table stores a row for every change in the enrollment or registration with a date and time stamp, which allows you to track modifications over time. This table serves as payment history for each enrollment or registration.

Transactions in this table that meet specific criteria are eventually posted to an Enterprise Learning Management subledger and then, in the case of chargebacks, exported to the general ledger in the financials system.

Transaction Table Statuses

Each transaction in the Transaction table has an assigned status:

Transaction Table Status	***Description***
Pending	Transaction has not been posted to a subledger.
Posted	Transaction has been posted to a subledger.
Updated	Transaction is an update to a transaction that has already been posted to a subledger.

Understanding Transaction Selection Criteria

The enrollment and registration transactions that the system selects and posts to a subledger are based on several criteria:

- The system writes transactions to the subledger for class enrollments that meet the criteria that you specify on the Subledger Update Options page.
- The system writes transactions for programs to the subledger when the registration status for the program is registered, in progress, completed, dropped, or incomplete.
- The system writes transactions with pending and updated transaction statuses to the subledger.

  Transactions in the Transaction table with a posted status have already been posted to a subledger and do not need to be posted again.
- The system writes only the most recent transaction for a particular enrollment or registration record to the subledger.

  For example, when an administrator enrolls a learner in a class that has a charge, the system adds a transaction to the Transaction table. If the learner drops the class and is charged a drop fee, the system adds another transaction to the Transaction table. This enables you to keep a running audit trail of all charges for a particular enrollment or registration record. When you update the subledger, the system posts only the most recent transaction for a particular enrollment or registration record, which in this case is the class drop fee.
- The system does not write 0.00 rows from the Transaction table to the subledger unless the row is an update to a transaction that has already been written to the subledger.

  For example, when an administrator enrolls a learner in a class that has a charge, the system adds a transaction to the Transaction table. If the learner drops the class and is not charged a drop fee, the system adds another transaction to the Transaction table with a 0.00 amount. Since the current row in the Transaction table is a zero amount, the system does not write the transaction to the subledger. However, if the first transaction with the enrollment fee was already written to the subledger, the system will write the 0.00 amount transaction to the subledger to update the transaction for the enrollment fee.

After the system writes a transaction to a subledger group, the system cannot remove it or write it to another subledger group. However, the system does cross check between subledger groups during the update process. This enables a transaction in a subledger group to be updated, even when you update a different subledger group. The system posts the new transaction to the new subledger group, and updates the original transaction to reflect that it is no longer current. You can update a subledger group as many times as necessary to ensure that all subledger entries are up to date and accurate before you export them to the general ledger in the financials system.

Process Payment Details Page

Use the Process Payment Details page (LM_RUNCTL_FI_ENRL) to post enrollment and registration transactions to a subledger.

Navigation:

Enterprise Learning > **Financial Details** > **Process Payment Details**

Run the Process Payment Details Application Engine process (LM_FI_ENRLMT) to post enrollment and registration transactions to a subledger. PeopleSoft Process Scheduler runs the Process Payment Details process at user-defined intervals.

Important! Run this process on a daily basis during off-peak business hours, as the system might need to review and potentially write thousands of transactions to the subledger.

Field or Control	***Description***
Subledger Group	Select a subledger group to update.
From Date and **Thru Date**	Enter a range of dates to select only transactions that took place during a specific period of time.
Process	Select the type of transactions to select and update. Values are: *All:* All types of transactions. *Drops:* Only drop transactions. *Enrollment:* Only enrollment or registration transactions.

See the product documentation for *PeopleTools: Applications User's Guide*

Reviewing Subledgers

Pages Used to Review Subledgers

Page Name	***Definition Name***	***Usage***
Review Subledger Page	LM_SUBLEDGER_INQ	Review current and historical transactions for a specific subledger group.

Page Name	***Definition Name***	***Usage***
Additional Information Page	LM_SUBLDGR_JRNL	View additional information for a particular subledger entry.
Class Enrollment Details Page	LM_SUBLDGR_ACT_ENR	View enrollment information for the learner, such as the class type, title, code, and enrollment status.
Class Drop Details Page	LM_SUBLDGR_ACT_DP	View class drop information, such as the class type, title, code, enrollment status for the learner, and the date the class was dropped.
Program Registration Details Page	LM_SUBLDGR_PROG_RG	View registration information for the learner, such as the program type, name, code, and registration status.
Program Drop Details Page	LM_SUBLDGR_PROG_DP	View registration details such as the program type, name, code, the learner's current registration status, and the date the program was dropped.
Review Subledger - Payment Details Page	LM_SUBLDGR_PYMT_CB	View chargeback account information for a learner.
Credit Details Page	LM_SUBLDGR_CREDIT	View credit account information for a learner.

Understanding Subledger Statuses

Transactions in a subledger have one of these statuses:

Status	***Description***
Pending	Transaction has not been written to the general ledger.

Status	***Description***
History	This status can mean one of the following: • The transaction has been updated since it was originally written to the subledger. This transaction originally had a *Pending* status but a new transaction for the enrollment or registration record has been written to the subledger. The new transaction has a *Pending* status. • The transaction is an update to a current *Pending* status transaction, but this new transaction is for a zero amount. Since the new transaction is for a zero amount, both transactions are set to *History* status. The system does not export either of the transactions to the general ledger. • A transaction with an *Updated* status is changed to *History* status when the transaction is updated again.
Posted	Transaction has been exported to the financials database. When a transaction has a *Posted* status, you cannot make changes to the transaction. The status of the transaction remains *Posted* even when the system writes a new transaction to the subledger that is an update to the posted transaction. Any updates to a posted transaction result in a new transaction entry with an *Updated* status.
Updated	Transaction is an update to a transaction that has a *Posted* status. The system does not export transactions with an *Updated* status to the general ledger. You must run the Payment Update report to extract all payment updates and manually make the adjustments in the financials system. See Financial Reports. You can make changes to transactions that have *Updated* statuses. The status of the updated transaction changes from *Updated* to *History* and the new transaction is added to the subledger with a status of *Updated*.

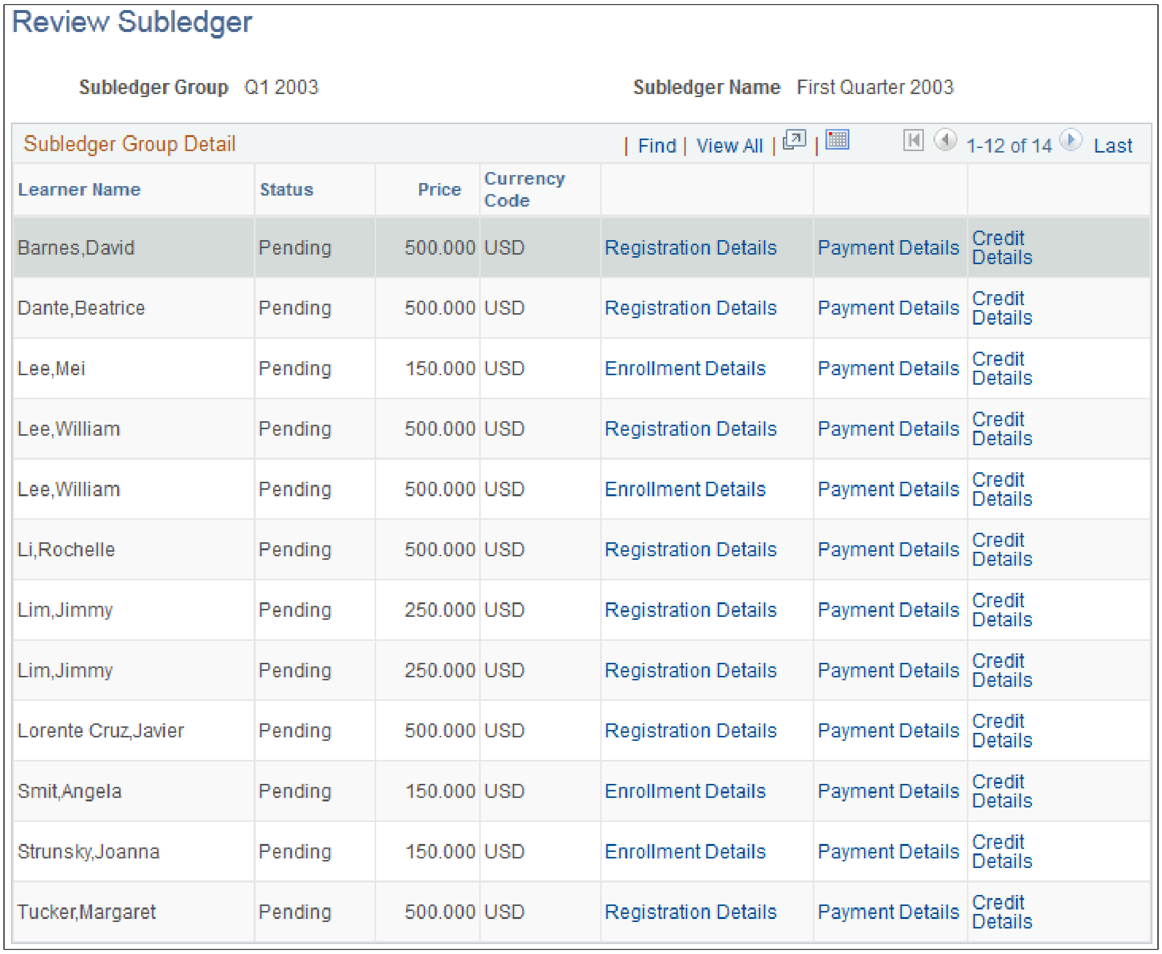
Review Subledger Page

Use the Review Subledger page (LM_SUBLEDGER_INQ) to review current and historical transactions for a specific subledger group.

Navigation:

Enterprise Learning > **Financial Details** > **Review Subledger**

This example illustrates the fields and controls on the Review Subledger page.



Learner Name	Status	Price	Currency Code			
Barnes,David	Pending	500.000	USD	Registration Details	Payment Details	Credit Details
Dante,Beatrice	Pending	500.000	USD	Registration Details	Payment Details	Credit Details
Lee,Mei	Pending	150.000	USD	Enrollment Details	Payment Details	Credit Details
Lee,William	Pending	500.000	USD	Registration Details	Payment Details	Credit Details
Lee,William	Pending	500.000	USD	Enrollment Details	Payment Details	Credit Details
Li,Rochelle	Pending	500.000	USD	Registration Details	Payment Details	Credit Details
Lim,Jimmy	Pending	250.000	USD	Registration Details	Payment Details	Credit Details
Lim,Jimmy	Pending	250.000	USD	Registration Details	Payment Details	Credit Details
Lorente Cruz,Javier	Pending	500.000	USD	Registration Details	Payment Details	Credit Details
Smit,Angela	Pending	150.000	USD	Enrollment Details	Payment Details	Credit Details
Strunsky,Joanna	Pending	150.000	USD	Enrollment Details	Payment Details	Credit Details
Tucker,Margaret	Pending	500.000	USD	Registration Details	Payment Details	Credit Details

Field or Control	***Description***
Learner Name	Displays learners to which the financial transactions apply. The system sorts each subledger by learners' last names. To sort by status or price, click the **Status** or **Price** headers at the top of each column.
Status	Displays the status of the transaction: *Pending, History, Updated,* or *Posted.* Click the **Posted** link to access the Additional Information page, where you can view additional status information for the transaction such as the journal ID, journal date, accounting date, and the user who ran the process to export the transaction to the general ledger.
Price	Displays the transaction amount.
Currency	Displays the currency for the transaction.

Field or Control	*Description*
Enrollment Details	Click to access the Class Enrollment Details page, where you can review enrollment details such as the class type, title, code, and the learner's current enrollment status. This link appears only if the transaction is an enrollment fee for a class.
Class Drop Details	Click to access the Class Drop Details page, where you can review enrollment details such as the class type, title, code, the learner's current enrollment status, and the date the class was dropped. This link appears only if the transaction is a drop charge for a class.
Registration Details	Click to access the Registration Details page, where you can review registration details such as the program type, name, code, and the current registration status for the learner. This link appears only if the transaction is a registration or drop fee for a program.
Program Drop Details	Click to access the Program Drop Details page, where you can review registration details such as the program type, name, code, the learner's current registration status, and the date the program was dropped. This link appears only if the transaction is a drop charge for a program.
Payment Details	Click to access the Review Subledger - Payment Details page, where you can review the payment method used to pay for the class or program and information pertaining to that payment method.
Credit Details	Click to access the Credit Details page, where you can review information for the account that is credited when a chargeback transaction occurs. Each chargeback transaction that is sent to the general ledger in the financials system must also include information for the account that is to be credited. Otherwise, the transaction is not exported to the general ledger. Define ChartField values for accounts that are credited transaction amounts on the Business Unit Accounts page. The fields on the Credit Details page are empty for all payment methods except chargeback.

Additional Information Page

Use the Additional Information page (LM_SUBLDGR_JRNL) to view additional information for a particular subledger entry.

Navigation:

Click the **Posted** link in the **Status** column on the Review Subledger page.

Field or Control	***Description***
Journal ID and **Journal Date**	Displays the journal ID and journal date. The system populates this field when it receives an inbound message from the general ledger confirming that the transaction was successfully posted to the general ledger.
Accounting Date	Displays the accounting date that you entered on the Export Accounting Entry to GL page when you ran the Export Accounting Entry to GL Application Engine process (LM_FI_GL_INTFC).
Last Maintained By	Displays the user that ran the Export Accounting Entry to GL process.

Related Links

Application Messages

Sending Chargeback Data to the General Ledger

Page Used to Send Chargeback Data to the General Ledger

Page Name	***Definition Name***	***Usage***
Export Accounting Entry to GL Page	LM_RUNCTL_GL_INTFC	Export chargeback transactions from a subledger to the general ledger in the financials system.

Understanding Data Export to the General Ledger

When you export transactions to your Financial Management System , the system exports all chargeback transactions in the subledger with a status of pending and then updates the status of each exported transaction to posted. The system does not export transactions with a status of history, updated, or posted. After the system exports the transactions in a subledger group, you must manually enter any corrections to those transactions in the financials system. Enterprise Learning Management provides a report that you can use to review all chargeback transaction updates so that you can accurately make the adjustments in the financials system.

The system does not export revenue transactions to an accounts receivable system. Revenue transactions remain in the subledger group with a subledger status of pending. Enterprise Learning Management provides several reports that you can use to review revenue transactions for a customer organization. These reports enable you to track and manually update these transactions in the accounts receivable system. Or, you can create a process to export revenue transactions to the accounts receivable system.

When you export transactions to the general ledger in the financials system, the system compares the transaction currency with the general ledger business unit base currency. If the currencies don't match, the system converts the currency of the transaction to the general ledger business unit base currency. The system uses the exchange rate that is specified in the **Currency Rate Type** field on the Install Defaults page to convert the currency. Import exchange rates from the financials system by using enterprise integration points (EIPs).

Related Links

Financial EIPs

Financial Reports

Export Accounting Entry to GL Page

Use the Export Accounting Entry to GL (export accounting entry to general ledger) page (LM_RUNCTL_GL_INTFC) to export chargeback transactions from a subledger to the general ledger in the financials system.

Navigation:

Enterprise Learning > **Financial Details** > **Export Accounting Entry to GL** > **Export Accounting Entry to GL**

Click **Run** to run this request. PeopleSoft Process Scheduler runs the Export Accounting Entry to GL process at user-defined intervals.

Note: You do not need to run the Export Accounting Entry to GL process on a daily basis; instead, it should be driven by the business rules of the organization. This might be on a monthly or quarterly basis, depending on the organization. Run this process during off-peak hours as processing might be intensive.

Field or Control	***Description***
Subledger Group	Select a subledger group.
Journal Template	Select a journal template. The journal template determines how the system formats transaction data in the Enterprise Learning Management Accounting Entry tables. Import journal templates from the financials system by using delivered EIP messages. See Financial EIPs.
Accounting Date	Enter an accounting date. All journals in a general ledger are associated with an accounting calendar. If you integrate with PeopleSoft Financials, Journal Generator selects the appropriate accounting calendar based on the accounting date that you enter here. If you integrate with a third-party financials system, you must create a process to associate journal entries with an accounting calendar after you export the journal entries to the financials system.

See the product documentation for *PeopleTools: Applications User's Guide*.

Chapter 28

Managing Learning Plans

Understanding Learning Plans

PeopleSoft Enterprise Learning Management enables you to create one or more learning plans for a learner. Learning plans can be created and updated in three ways:

- By learners through self service.
- By managers through self service.
- By learning administrators through an online component.

Learners, managers, and administrators can attach courses, classes, and programs to learning plans. In addition, learners, managers, and administrators can define and update the attributes for each learning item within a learning plan such as status, priority, and target completion date.

Managing Personal Learning Plans

Pages Used to Manage Personal Learning Plans

Page Name	***Definition Name***	***Usage***
Learning Plans - Current Learning Plans Page	LM_LPLN	Create and update personal learning plans.
Learning Plans - Learning Plan History Page	LM_LPLN	Review completed personal learning plans.
Learning Plan Details Page	LM_LPLN_DTL	View and update personal learning plan details.
Edit Learning Item Page	LM_LPLN_DTL_SEC	Edit details for a learning item attached to a learning plan.
Select Learning Plans Page	LM_LPLN_SEL	Add learning items to personal learning plans.

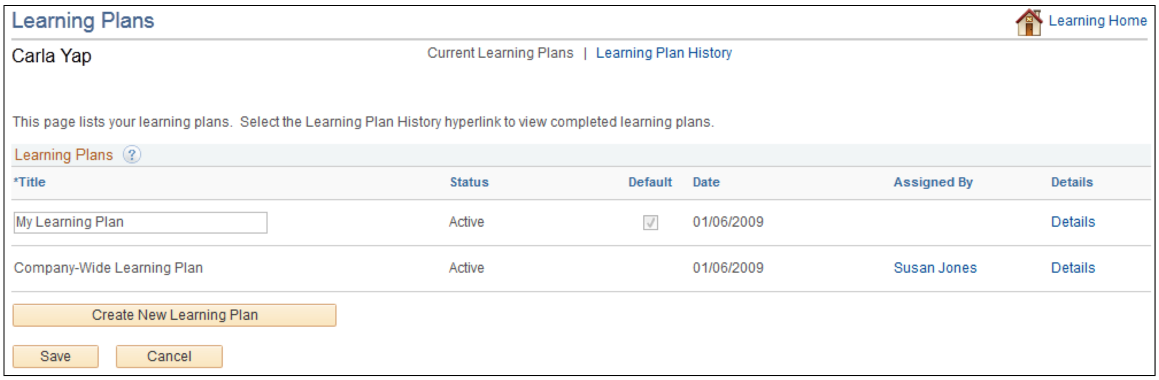
Learning Plans - Current Learning Plans Page

Use the Learning Plans - Current Learning Plans page (LM_LPLN) to create and update personal learning plans.

Navigation:

Self Service > **Learning** > **Learning Plans** > **Learning Plans**

This example illustrates the fields and controls on the Learning Plans - Current Learning Plans page.



Learners can use this page to view current learning plans and create new learning plans.

Field or Control	***Description***
Title	Lists the title of a learning plan. Learners can edit titles of learning plans that they assign. The titles of learning plans assigned by managers and administrators are display only.
Status	Displays the current status of each learning plan. Learners can edit the status of learning plans that they assign. Valid values are: • *Active:* The learning plan is active and can have new learning items added to it. • *Inactive:* The learning plan is inactive and cannot have any new learning items added to it. • *Complete:* When you select this value, the system moves the learning plan to the Learning Plans - Learning Plan History page. The status of learning plans assigned by managers and administrators are display only.
Default	Indicates which learning plan is the learner's default learning plan.
Date	Displays the date on which each learning plan was assigned to the learner.

Field or Control	*Description*
Assigned By	Lists the person who assigned each learning plan to the learner. You can click a name in this column to access the Learner Information page for the person.
Details	Click to access the Learning Plan Details page for the learning plan where learners can view the learning items associated with their plans and add new learning items. See Learning Plan Details Page.

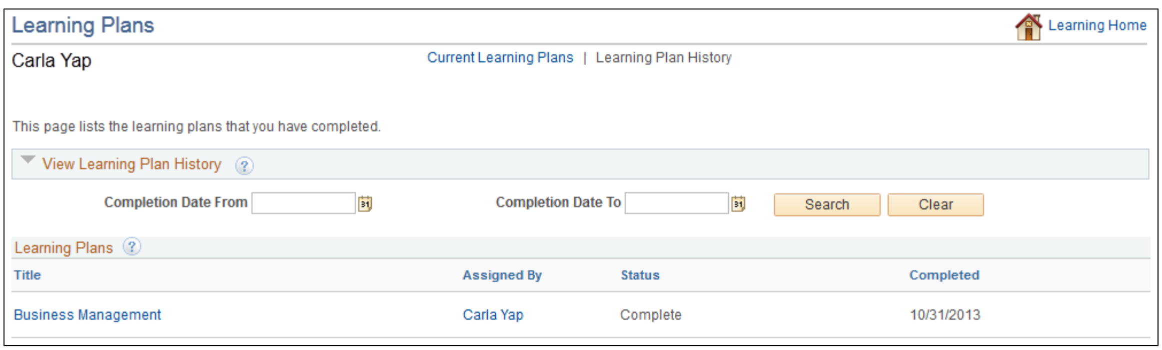
Learning Plans - Learning Plan History Page

Use the Learning Plans - Learning Plan History page (LM_LPLN) to review completed personal learning plans.

Navigation:

Click the **Learning Plan History** link on the Learning Plans - Current Learning Plans page.

This example illustrates the fields and controls on the Learning Plans - Learning Plan History page.



Learners can use this page to view a record of their completed learning plans within a specified date range.

Field or Control	*Description*
Title	Displays the titles of the learners completed learning plans. Click a title to access the Learning Plan Details page for the learning plan where you can view details about the completed learning plan.
Assigned By	Lists the person who assigned each learning plan to the learner. You can click a name in this column to access the Learner Information page for the person.
Status	Displays the status of the learning plan.

Field or Control	*Description*
Completed	Displays the date on which the learning plan was completed.

Learning Plan Details Page

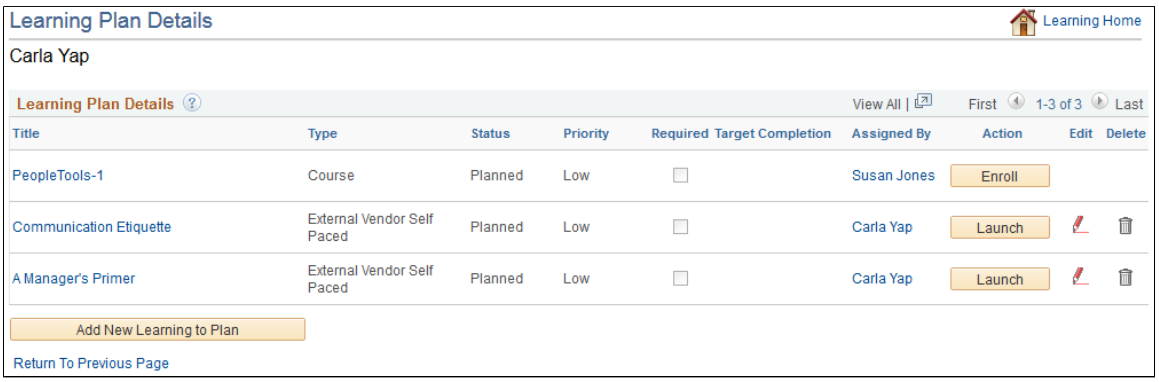
Use the Learning Plan Details page (LM_LPLN_DTL) to view and update personal learning plan details.

Navigation:

Click the **Details** link on the Learning Plans - Current Learning Plans page.

Click the **<Learning Plan Title>** link on the Learning Plans - Learning Plan History page.

This example illustrates the fields and controls on the Learning Plan Details page.



Learners can use this page to view the classes, courses, and programs associated with their learning plans. For current learning plans, learners can use this page to add new learning to their learning plans and access the <Class Name> page to manage the classes associated with their learning plans.

Field or Control	*Description*
Title	Lists the titles of the learning items in the learning plan. Learners can click a title to access the Course Details page, Class Details page, or Program Details page according to the type of learning item it is.
Type	Displays the type of learning for each item in the learning plan. For classes, this column displays the delivery method.
Status	Displays the current status of the learning item. All new learning items begin with a status of *Planned.* This status changes according to the action taken for the learning item, such as enrollment or registration. **Note:** This does not represent the status of the entire learning plan.

Field or Control	***Description***
Priority	Displays the priority for each learning item.
Required	Indicates whether a learning item is required.
Target Completion	Displays the date on which the learning item should be completed.
Assigned By	Lists the person who assigned each learning item to the learning plan. You can click a name in this column to access the Learner Information page for the person.
Action	Lists a button for the next available action for the learning item. Learners can click the button to take that action for the learning item.
Edit	Click the icon in this column to access the Edit Learning Item page where you can edit details for the learning item. The icon is available only for learning items in an active learning plan that were added by the learner.
Delete	Click the icon in this column to delete a learning item from the learning plan. The icon is available only for learning items in an active learning plan that were added by the learner.
Add New Learning to Plan	Click to access the Search Catalog page where you can search and select learning items to add to the learning plan. **Note:** This link is available only for active learning plans.

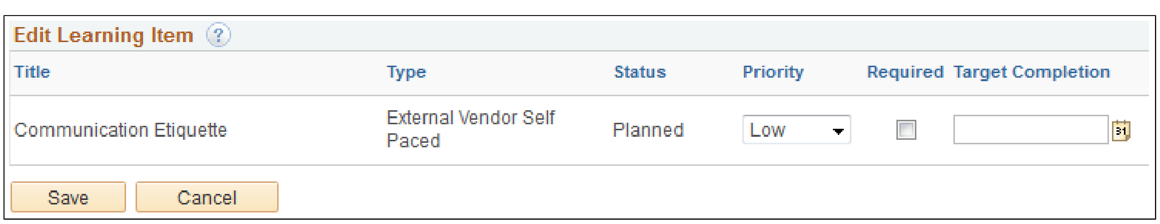
Edit Learning Item Page

Use the Edit Learning Item page (LM_LPLN_DTL_SEC) to edit details for a learning item attached to a learning plan.

Navigation:

Click the **Edit** icon on the Learning Plan Details page.

This example illustrates the fields and controls on the Edit Learning Item page.



Field or Control	*Description*
Priority	Select the priority for the learning item. **Note:** This field is informational only.
Required	Select to indicate that a learning item is required. Learning items with this check box selected appear with the Required indicator in the Team Learning and My Current Learning pagelets of the Learning Home Dashboard.
Target Completion	Enter the value that appears as the Due Date in the Team Learning and My Current Learning pagelets of the Learning Home Dashboard.

Related Links

Using the Learning Home Pagelets

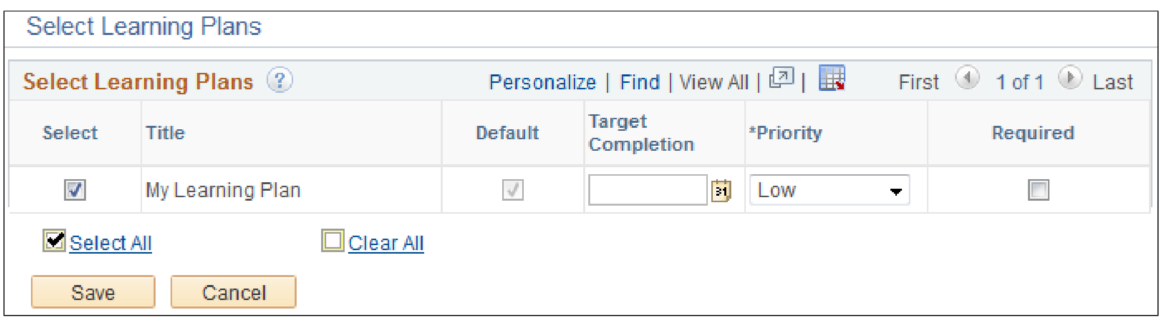
Select Learning Plans Page

Use the Select Learning Plans page (LM_LPLN_SEL) to add learning items to personal learning plans.

Navigation:

Click the **Plan for Later** button on the Find Learning page.

This example illustrates the fields and controls on the Select Learning Plans page.



Learners can use this page to select the learning plan to which they want to add a learning item.

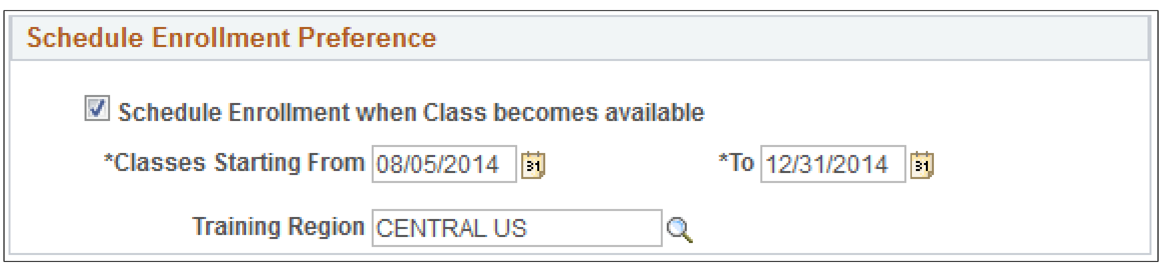
Field or Control	*Description*
Select	Select this check box next to the learning plans to which you want to add the learning item.
Title	Displays the titles of the learner's learning plans.

Field or Control	Description
Default	Indicates whether a learning plan is the learner's default learning plan.
Target Completion	Enter the value that appears as the Due Date in the Team Learning and My Current Learning pagelets of the Learning Home Dashboard.
Priority	Select the priority for the learning item. **Note:** This field is informational only.
Required	Select to indicate that a learning item is required. Learning items with this check box selected appear with the Required indicator in the Team Learning and My Current Learning pagelets of the Learning Home Dashboard.

Schedule Enrollment Preferences

If you select the Allow Schedule Enrollment check box on the Install Defaults – Enrollment Page, this group box appears on the Select Learning Plans page when you click the **Plan for Later** button for a course on the Find Learning page. You can use it to schedule automatic enrollment into a class for this course if it becomes available at a specific time and location.

This is an example of the Schedule Enrollment Preference group box that appears if scheduled enrollment is enabled.



Field or Control	Description
Schedule Enrollment when Class becomes available	Select to schedule automatic enrollment into a class that becomes available within a specific date range and within a specific training region. When you select this check box, the rest of the fields in this group box become available.

Field or Control	*Description*
Classes Starting From and **To**	Enter the date range for which you want to schedule automatic enrollment. The system will enroll you into a class for the planned course only if it is offered within the date range that you specify. **Note:** The default value of the **Classes Starting From** field is the current date. The default value for the **To** field is the target completion date, if specified.
Training Region	Enter the training region for which you want to schedule automatic enrollment. The system will enroll you into a class for the planned course only if it is offered within the training region that you specify. The value you enter here overrides the preferred training region defined for the learner through learner preferences or on the Internal Learners - Learner Attributes page. For more information on training regions, see the documentation for the Training Region Page.

Managing Team Learning Plans

Pages Used to Manage Team Learning Plans

Page Name	*Definition Name*	*Usage*
Team Learning Plans - Current Learning Plans Page	LM_LPLN_MGR	Review current learning plans for team members.
Team Learning Plans - Learning Plan History Page	LM_LPLN_MGR	Review completed learning plans for team members.
Team Learning Plans Page	LM_LPLN_MGR_SEL	Create and update learning plans for team members.
Learning Plan Details Page	LM_LPLN_DTL	Update team learning plan details.
Select Learning Plans Page	LM_LPLN_SEL	Add learning items to team learning plans.

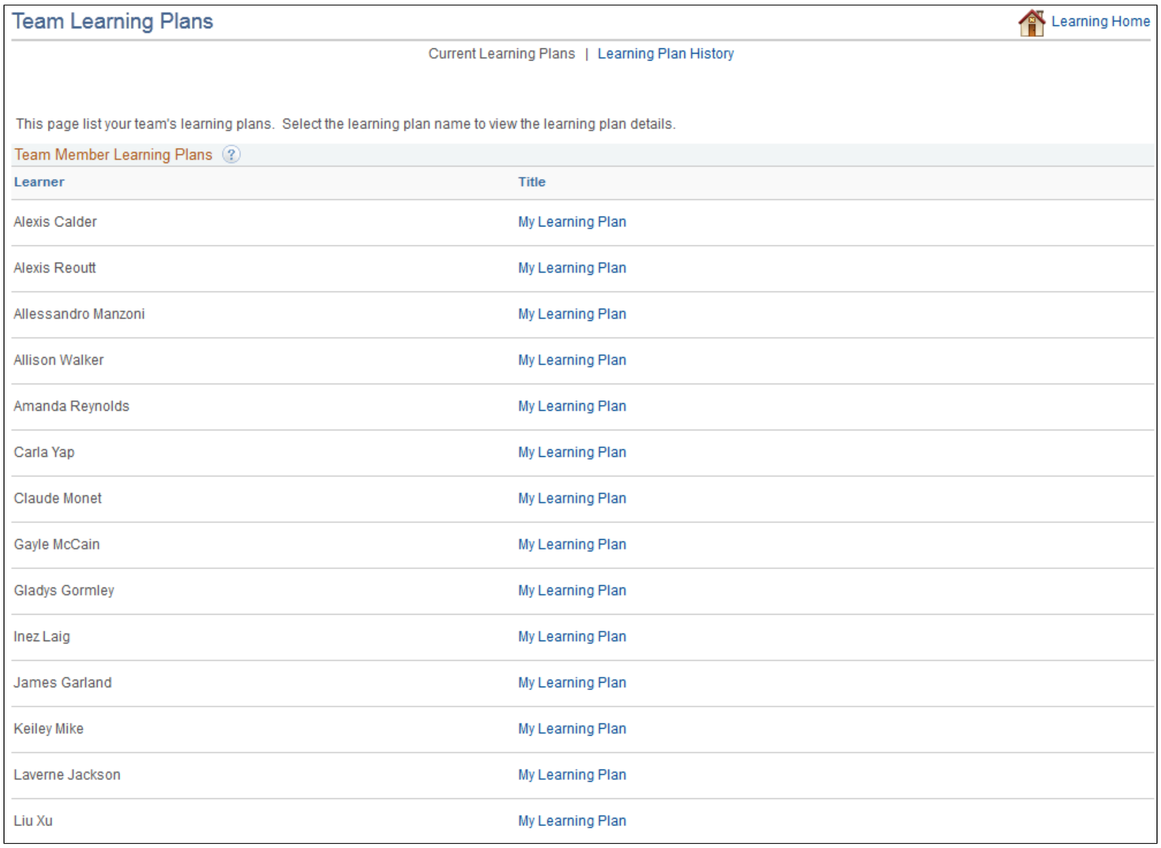
Team Learning Plans - Current Learning Plans Page

Use the Team Learning Plans - Current Learning Plans page (LM_LPLN_MGR) to review current learning plans for team members.

Navigation:

Manager Self Service > **Team Learning** > **Team Learning Plans** > **Team Learning Plans**

This example illustrates the fields and controls on the Team Learning Plans - Current Learning Plans page.



Managers can use this page to view the current learning plans of their team members. By clicking the **Update Learning Plans** link, managers can update existing learning plans or create new ones.

Field or Control	***Description***
Learner	Lists the name of each team member.
Title	Displays the titles of the learning plans for your team members. Click a link in this column to access the Learning Plan Details page for the learning plan.
Assigned By	Lists the person who assigned the learning plan. You can click a name in this column to access the Learner Information page for the person.

Field or Control	*Description*
Update Learning Plans	Click to access the Team Learning Plans page where you can create new learning plans for team members, update existing learning plans for team members, or add learning items to team members' learning plans. See Team Learning Plans Page.

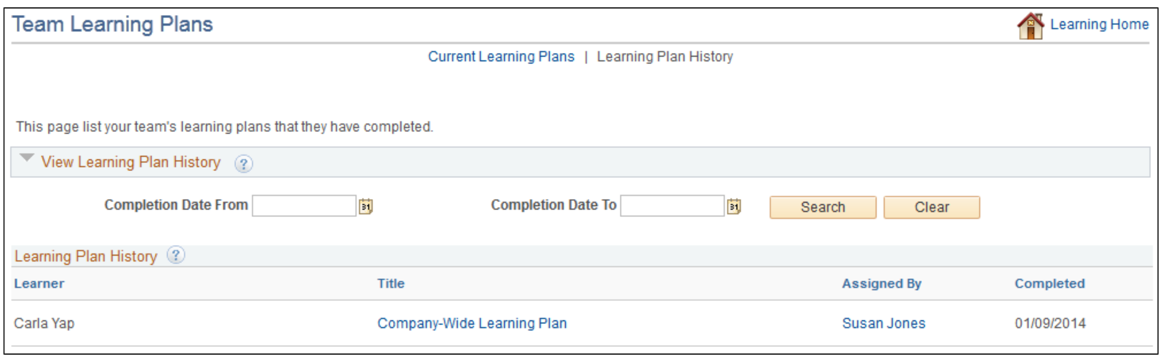
Team Learning Plans - Learning Plan History Page

Use the Team Learning Plans - Learning Plan History page (LM_LPLN_MGR) to review completed learning plans for team members.

Navigation:

Click the **Learning Plan History** link on the Team Learning Plans - Current Learning Plans page.

This example illustrates the fields and controls on the Team Learning Plans - Learning Plan History page.



Managers can use this page to view records of their team members' completed learning plans within a specified date range.

Field or Control	*Description*
Learner	Displays the name of the team members with completed learning plans.
Title	Displays the titles of team members' completed learning plans. You can click a title in this column to access the Learning Plan Details page for a completed learning plan.
Assigned By	Lists the person who assigned each learning plan to the learner. You can click a name in this column to access the Learner Information page for the person.
Completed	Displays the date on which the learning plan was completed.

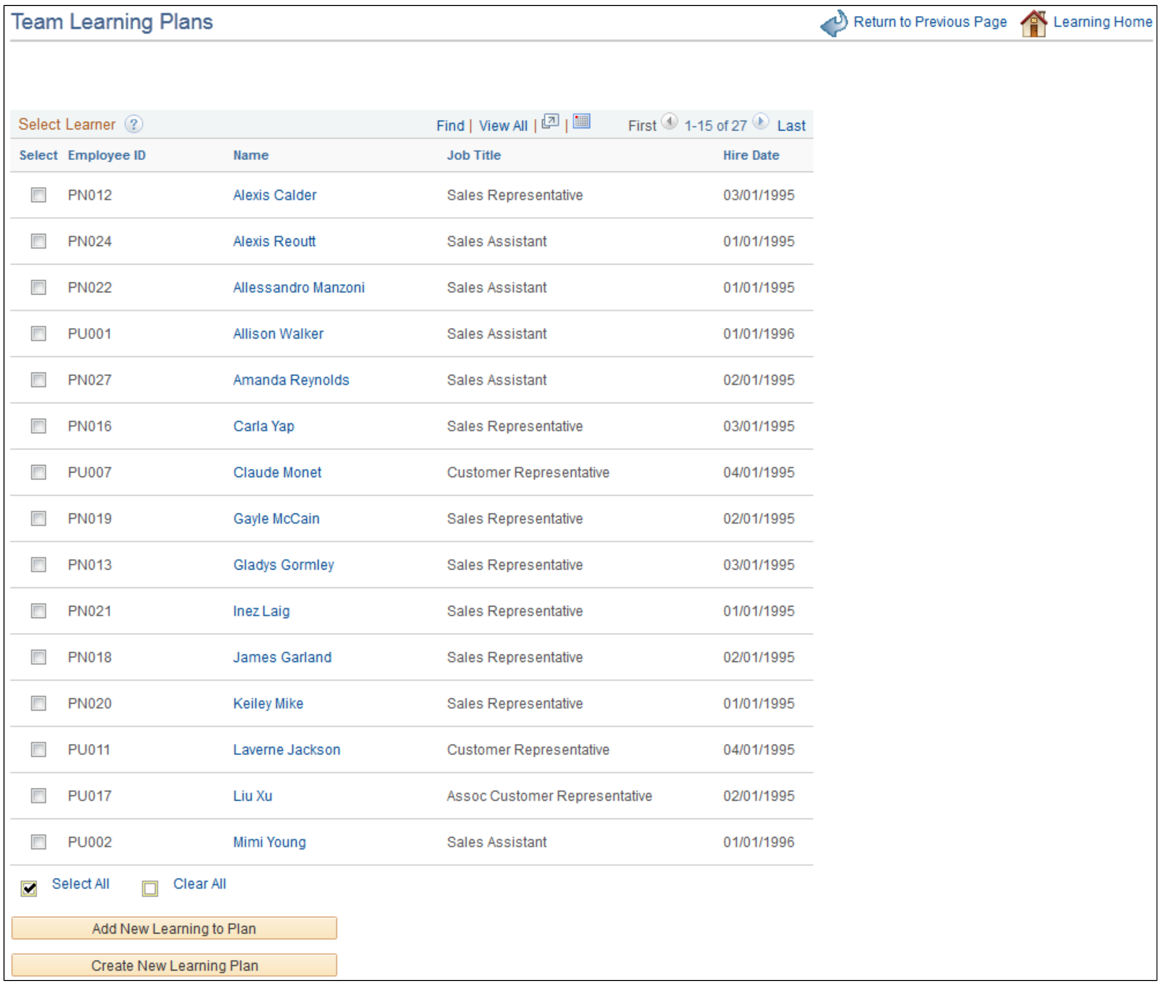
Team Learning Plans Page

Use the Team Learning Plans page (LM_LPLN_MGR_SEL) to create and update learning plans for team members.

Navigation:

Click the **Update Learning Plans** link on the Team Learning Plans - Current Learning Plans page.

This example illustrates the fields and controls on the Team Learning Plans page.



Managers can use this page to add new learning plans for team members or to add learning items to their team members' existing learning plans.

Field or Control	***Description***
Select	Select next to the team members for whom you want to add new learning or create new learning plans.
Employee ID	Displays the employee ID for each team member.

Field or Control	Description
Name	Displays the name of each team member. Click a name to access the Learner Information page for a team member.
Job Title	Displays the job title for each team member.
Hire Date	Displays the hire date for each team member.
Add New Learning to Plan	Click to access the Search Catalog page for learning to add to the learning plans of the selected team members.
Create New Learning Plan	Click to access the Add Learning Plan to Learner group box where you can create new learning plans for the selected team members.

Add Learning Plan to Learner

Field or Control	Description
Learning Plan Name	Select an existing learning plan to add for the selected team members.
Create	Click to create a new learning plan to add for the selected team members.

The titles of learning plans that you add for multiple team members are shared by those team members. If the title of the shared learning plan is changed, the change is visible to any team members that share the learning plan. Only the learning plan name is shared, not the learning plan details.

Learning Plan Details Page

Use the Learning Plan Details page (LM_LPLN_DTL) to update team learning plan details.

Navigation:

Click the **<Learning Plan Title>** link on the Team Learning Plans - Current Learning Plans page.

Click the **<Learning Plan Title>** link on the Team Learning Plans - Learning Plan History page.

Managers can use this page to view the classes, courses, and programs associated with team member learning plans. For current learning plans, managers can use this page to add new learning to learning plans and access the <Class Name> page to manage the classes associated with the learning plans.

This page is identical to the Learning Plan Details page accessed through the Learning Plans - Current Learning Plans page.

See Learning Plan Details Page.

Select Learning Plans Page

Use the Select Learning Plans page (LM_LPLN_SEL) to add learning items to team learning plans.

Navigation:

- Click the **Add to Plan** link on the Search Catalog page.
- Click the **Add to Plan** button on the <Course Name> page.

Managers can use this page to select the learning plan to which they want to add a learning item.

This page is identical the Select Learning Plans page that learners can access through self service except that a manager cannot select a training region in the **Schedule Enrollment Preference** group box.

See Select Learning Plans Page.

Administrating Learning Plans

Pages Used to Administrate Learning Plans

Page Name	***Definition Name***	***Usage***
Maintain Learning Plans - Find Learner Page	LM_LPLN_ADM	Maintain learning plans.
Maintain Learning Plans - Current Learning Plans Page	LM_LPLN	Create and update learning plans for learners.
Maintain Learning Plans - Learning Plan History Page	LM_LPLN	Review completed learning plans for learners.
Learning Plan Details Page	LM_LPLN_DTL	View a learner's learning plan details.
Select Learning Plans Page	LM_LPLN_SEL	Add learning items for learners.

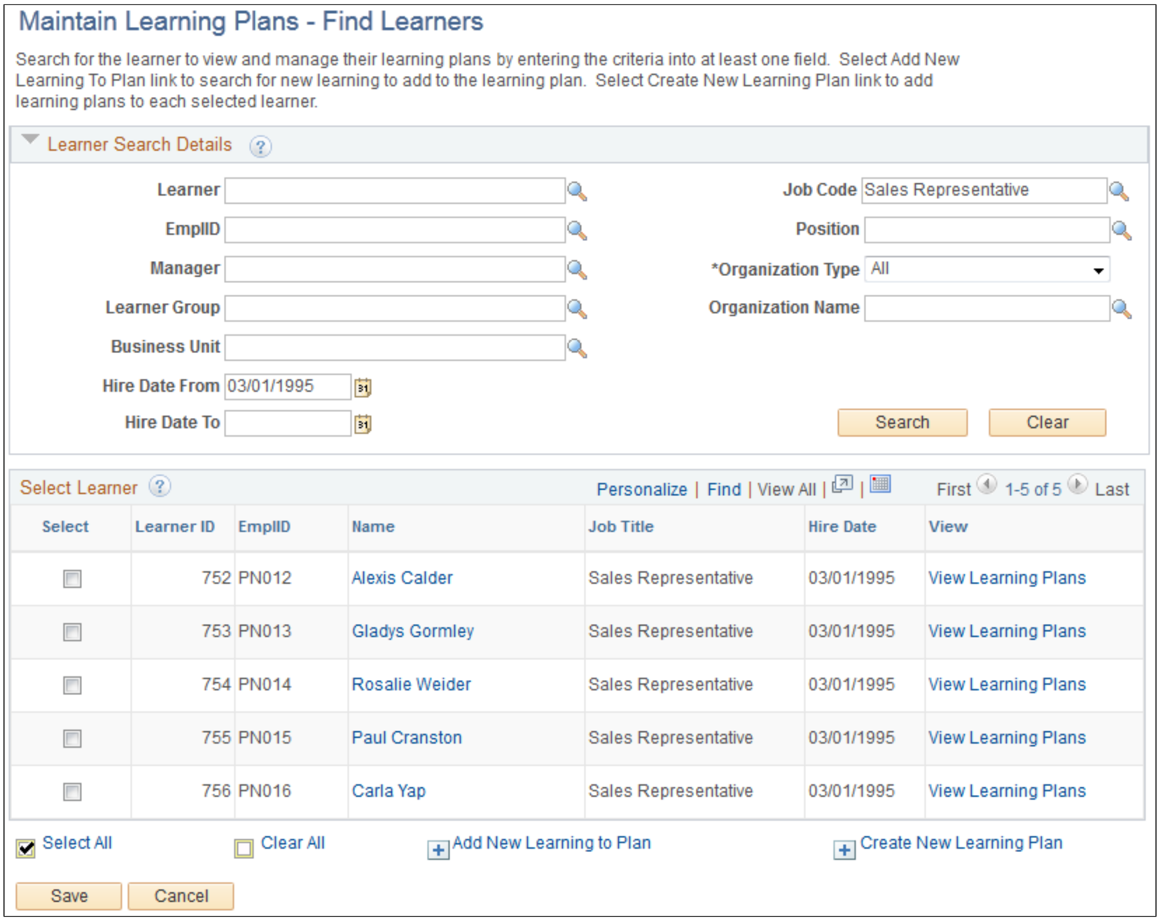
Maintain Learning Plans - Find Learner Page

Use the Maintain Learning Plans - Find Learner page (LM_LPLN_ADM) to maintain learning plans.

Navigation:

Enterprise Learning > **Learner Tasks** > **Maintain Learning Plans**

This example illustrates the fields and controls on the Maintain Learning Plans - Find Learners page.



Learning administrators can use this page to add new learning items to learners' learning plans and to add new learning plans for learners. They can also use it to access the current learning plans for a learner.

Learner Search Details

Use this group box to search for learners that meet the search criteria you specify. When you click Search, the system populates the Select Learner group box with the learners who meet your search criteria.

Select Learner

This group box displays the learners that meet the search criteria you specify in the Learner Search Details group box.

Field or Control	***Description***
Select	Select next to the learners for whom you want to add new learning or create new learning plans.
Learner ID	Displays the learner ID for each learner.

Field or Control	Description
Employee ID	Displays the employee ID for each learner.
Name	Displays the name of each learner. Click a name to access the Learner Information page for a learner.
Job Title	Displays the job title for each learner.
Hire Date	Displays the hire date for each learner.
View Learning Plans	Click to access the Maintain Learning Plans - Current Learning Plans page for a learner. See Maintain Learning Plans - Current Learning Plans Page.
Add New Learning to Plan	Click to access the Search Catalog page for learning to add to the learning plans of the selected learners.
Create New Learning Plan	Click to access the Add Learning Plan to Learner group box where you can create new learning plans for the selected learners.

Add Learning Plan to Learner

Field or Control	Description
Learning Plan Name	Select an existing learning plan to add for the selected learners.
Create	Click to create a new learning plan to add for the selected learners.

The titles of learning plans that you add for multiple learners are shared by those learners. If the title of the shared learning plan is changed, the change is visible to any learners that share the learning plan. Only the learning plan name is shared, not the learning plan details.

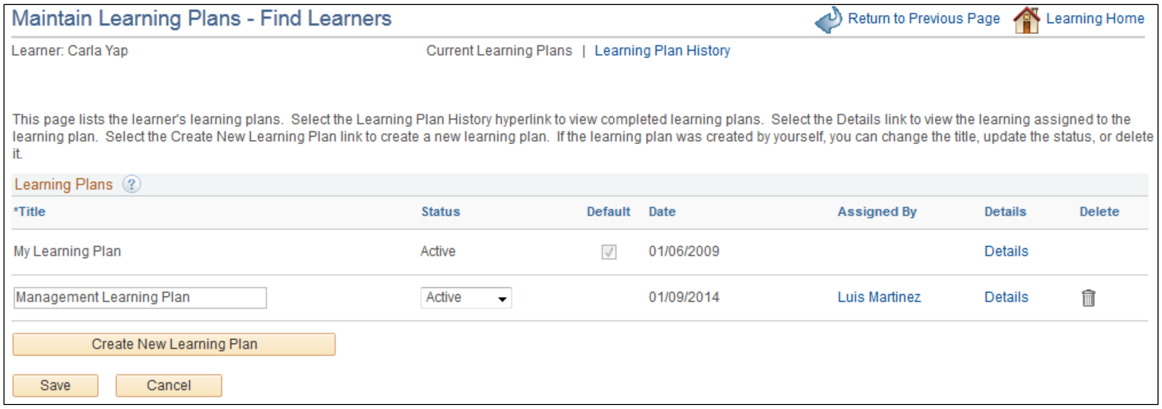
Maintain Learning Plans - Current Learning Plans Page

Use the Maintain Learning Plans - Current Learning Plans page (LM_LPLN) to create and update learning plans for learners.

Navigation:

Click the View Learning Plans link for a specific learner on the Maintain Learning Plans page.

This example illustrates the fields and controls on the Maintain Learning Plans - Current Learning Plans page.



Learning administrators can use this page to create and update learning plans for a specific learner.

Field or Control	***Description***
Title	Lists the title of a learning plan. Learning administrators can edit titles of learning plans that they assign. The titles of learning plans assigned by managers and learners are display only.
Status	Displays the current status of each learning plan. Valid values are: • *Active:* The learning plan is active and can have new learning items added to it. • *Inactive:* The learning plan is inactive and cannot have any new learning items added to it. • *Complete:* When you select this value, the system moves the learning plan to the Learning Plans - Learning Plan History page. The status of the default learning plan is always *Active* and not editable.
Default	Indicates which learning plan is the learner's default learning plan.
Date	Displays the date on which each learning plan was assigned to the learner.
Assigned By	Lists the person who assigned each learning plan to the learner. You can click a name in this column to access the Learner Information page for the person.

Field or Control	***Description***
Details	Click to access the Learning Plan Details page for the learning plan where learning administrators can view the learning items associated with the learner's plans and add new learning items. See Learning Plan Details Page.

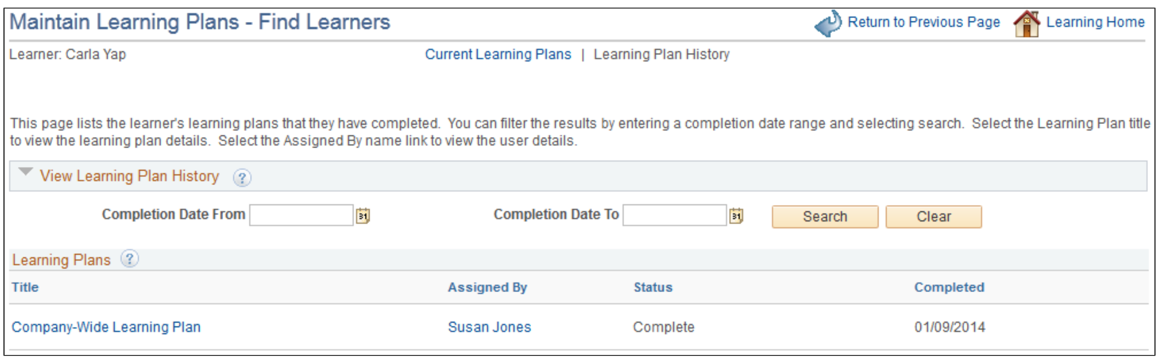
Maintain Learning Plans - Learning Plan History Page

Use the Maintain Learning Plans - Learning Plan History page (LM_LPLN) to review completed learning plans for learners.

Navigation:

Click the Learning Plan History link on the Maintain Learning Plans - Current Learning Plans page.

This example illustrates the fields and controls on the Maintain Learning Plans - Learning Plan History page.



Learning administrators can use this page to view a record of the learner's completed learning plans within a specified date range. This field on this page are identical to the ones on the Learning Plans - Learning Plan History page.

See Learning Plans - Learning Plan History Page.

Learning Plan Details Page

Use the Learning Plan Details page (LM_LPLN_DTL) to view a learner's learning plan details.

Navigation:

Click the Details link on the Maintain Learning Plans - Current Learning Plans page.

Click the <Learning Plan Title> link on the Maintain Learning Plans - Learning Plan History page.

Learning administrators can use this page to view a learner’s learning plan details. For current learning plans, learning administrators can use this page to add new learning to the learners’ learning plans and access the <Course Name> link to manage the courses or classes associated with the learning plans. Learning administrators can also access the <Program Name> link to manage the programs associated with the learning plans.

This page is identical to the Learning Plan Details page accessed through the Learning Plans - Current Learning Plans page.

See Learning Plan Details Page.

Select Learning Plans Page

Use the Select Learning Plans page (LM_LPLN_SEL) to add learning items for learners.

Navigation:

Click the **Add to Plan** link on the Search Catalog page.

Click the **Add to Plan** button on the <Course Name> page.

Learning administrators can use this page to select the learning plan to which they want to add a learning item for a learner.

This page is identical the Select Learning Plans page that learners can access through self service.

See Select Learning Plans Page.

Converting Planned Classes into Planned Courses

Page Used to Convert Planned Classes into Planned Courses

Page Name	***Definition Name***	***Usage***
Process Planned Classes Page	LM_PRCS_PLAN	Convert planned classes to corresponding planned courses.

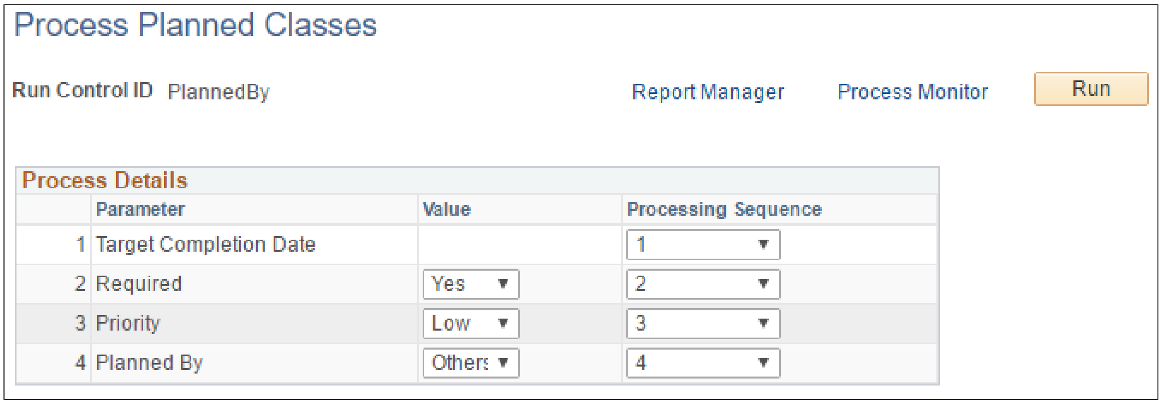
Process Planned Classes Page

Use the Process Planned Classes page (LM_PRCS_PLAN) to convert planned classes to corresponding planned courses.

Navigation:

Enterprise Learning > **Process Planned Classes**

This example illustrates the fields and controls on the Process Planned Classes page.



The LM_PRCS_PLAN Application Engine process migrates planned classes to planned courses based on four parameters:

- Target Completion Date
- Required
- Priority
- Planned By

Field or Control	***Description***

Value	Select the parameter values that the process uses to select planned classes to migrate.
	• Required:
	  • *Yes*
	  • *No*
	• Priority:
	  • *Low*
	  • *Medium*
	  • *High*
	• Planned By:
	  • *Self*
	  • *Others*

Processing Sequence	Use the fields in this column to determine the order in which the system processes the defined parameters.

Field or Control	Description
Run	Click to initiate the LM_PRCS_PLAN Application Engine process. If a course for a planned class is already planned, the process ignores it. If a single class is planned for a course, the process copies the Target Completion Date, Required, Priority, and Planned By values of the class to the course and gives it a status of *Planned*. If multiple classes are planned for course, the process selects one of the classes to convert to a planned course based on the parameters and processing sequence defined on this page. If the process cannot select a single course based on those parameters and processing sequence, it selects the class with the lowest enrollment ID. When the process completes successfully, all of the converted planned courses should appear for learners on the My Learning Page: Planned Tab. The process changes the status to *Cancelled* for all the planned classes that it converted to a single planned course.

Chapter 29

Managing Notifications

Understanding Notifications

Notifications are messages that the system sends to learners and instructors to provide them with reminders or alert them to changes to aspects of the system that might affect them. This overview of notifications discusses:

- Types of notifications.
- Notification templates.
- Notification events.
- Ad hoc notifications.

Types of Notifications

PeopleSoft Enterprise Learning Management enables you to send:

- Class notifications

  See Sending Class Notifications.

- Program notifications

  See Sending Program Notifications.

- Learning request notifications

  See Generating Notifications for Learning Requests.

- Enrollment, registration, and waitlist notifications

  See Sending Enrollment, Registration, and Waitlist Notifications.

- DIF (Droit Individuel à la Formation) request notifications

  See DIF Request Notifications Page.

Note: Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of notifications in one central location. ELM supports Notification Composer for approval notifications to the manager starting from PI 23. For more information on Notification Composer Framework, see the product documentation for *PeopleSoft Enterprise Components*.

Notification Templates

Notification templates define the content of the notifications that the system sends. PeopleSoft Enterprise Learning Management includes a variety of delivered notification templates and enables you to create new ones.

Related Links

Maintaining Notification Templates

Notification Events

Notification events define the circumstances under which the system triggers the generation of notifications. Each notification event comprises one or more event actions. An event action defines the recipient, learning environment, and template for the notification that is triggered by the notification event. The one to many relationship between notification events and event actions makes it possible to generate multiple notifications from one event.

PeopleSoft Enterprise Learning management enables you to modify, activate, and inactivate the notification events delivered with the system. In addition, it enables you to configure certain options relevant to the event.

Related Links

Configuring Notification Events

Ad Hoc Notifications

PeopleSoft Enterprise Learning Management enables you to generate ad hoc notifications in addition to the ones you generate in batch and through real time transactions. You can generate specific ad hoc notifications for classes and programs, or you can generate generic ad hoc notifications.

Related Links

Sending Class Notifications

Ad hoc Program Notifications Page

Creating and Sending Ad Hoc Notifications and Announcements

Maintaining Notification Templates

To maintain notification templates, use the Notification Templates (LM_NOTIF_TMPL) component.

Pages Used to Maintain Notification Templates

Page Name	***Definition Name***	***Usage***
Notification Template Definition Page	LM_NOTIF_TMPL	Modify and create notification templates.

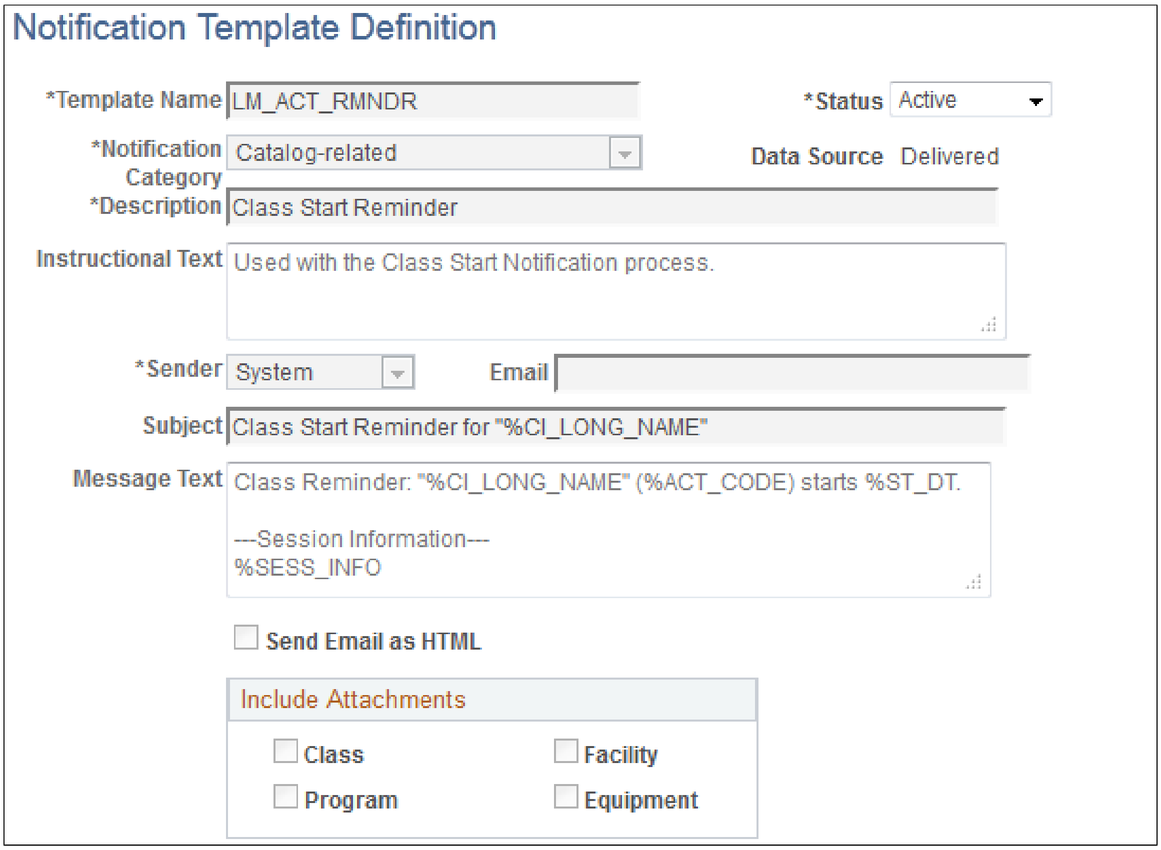
Notification Template Definition Page

Use the Notification Template Definition page (LM_NOTIF_TMPL) to modify and create notification templates.

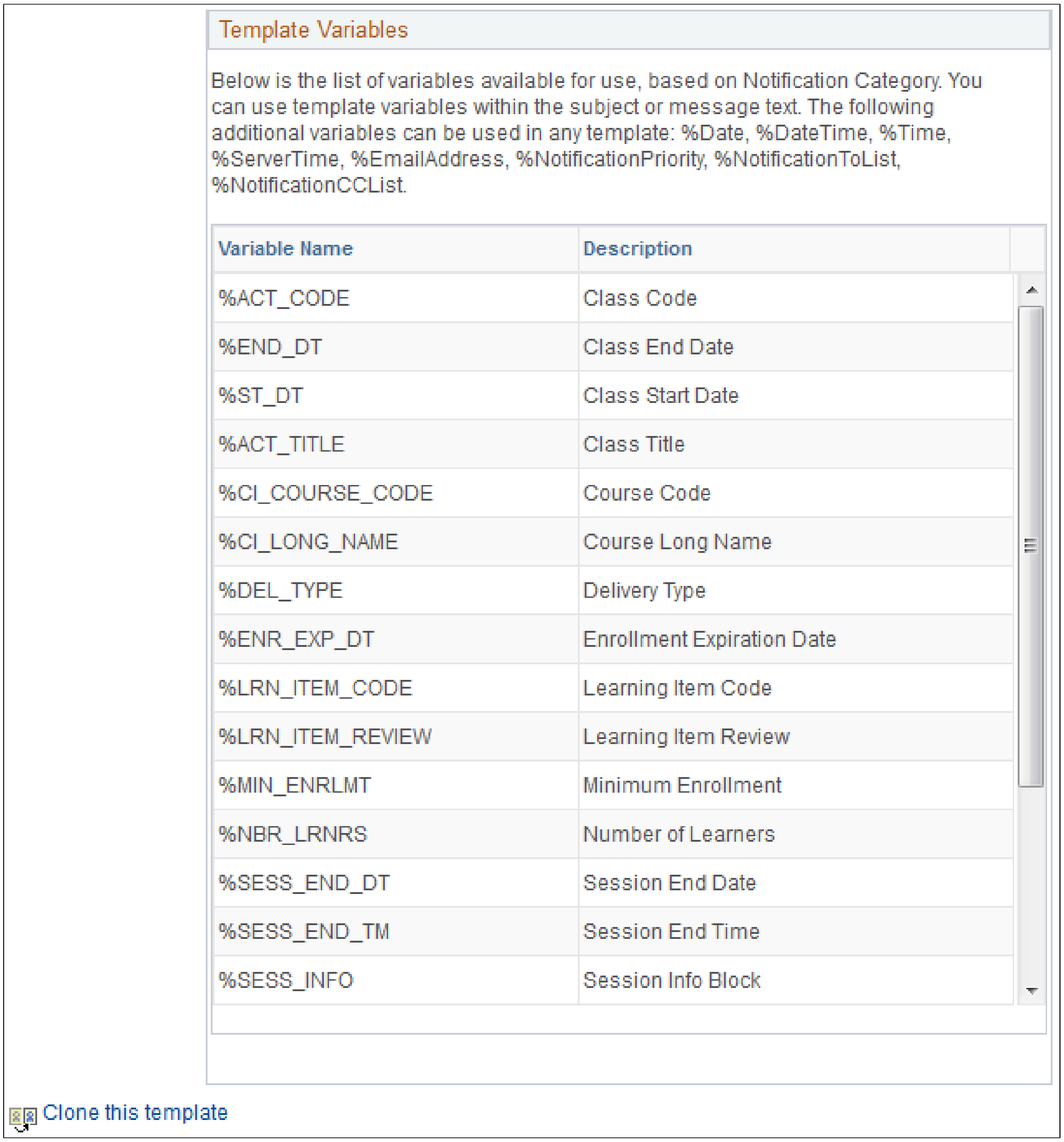
Navigation:

Enterprise Learning > **Notifications** > **Notification Templates** > **Notification Template Definition**

This example illustrates the fields and controls on the Notification Template Definition (page 1 of 2).



This example illustrates the fields and controls on the Notification Template Definition (page 2 of 2).



Template Variables

Below is the list of variables available for use, based on Notification Category. You can use template variables within the subject or message text. The following additional variables can be used in any template: %Date, %DateTime, %Time, %ServerTime, %EmailAddress, %NotificationPriority, %NotificationToList, %NotificationCCList.

Variable Name	Description
%ACT_CODE	Class Code
%END_DT	Class End Date
%ST_DT	Class Start Date
%ACT_TITLE	Class Title
%CI_COURSE_CODE	Course Code
%CI_LONG_NAME	Course Long Name
%DEL_TYPE	Delivery Type
%ENR_EXP_DT	Enrollment Expiration Date
%LRN_ITEM_CODE	Learning Item Code
%LRN_ITEM_REVIEW	Learning Item Review
%MIN_ENRLMT	Minimum Enrollment
%NBR_LRNRS	Number of Learners
%SESS_END_DT	Session End Date
%SESS_END_TM	Session End Time
%SESS_INFO	Session Info Block

Clone this template

Field or Control	Description
Template Name	Enter a name for the notification template.
Status	Specify whether the template is *Active* or *Inactive.* Inactive notification templates are unavailable for use when configuring notification events. If you set a notification template to *Inactive* and it is currently associated with an active notification event, you will receive an error when you try to save the notification template.

Field or Control	***Description***
Notification Category	Select a category for the notification template. The category that you select determines the variables that the system displays in the Template Variables group box. Values are: • *Ad-hoc* • *Calendar-related* • *Catalog-related* • *Curricula and Certifications* • *Enrollment-related* • *Learning Requests / Waitlists* • *Objective-related* • *Supplemental Learning*
Data Source	Displays the origin of the notification template. All notification templates delivered with the system have the *Delivered* value. Newly created or cloned notification templates have the *Custom* value. For *Delivered* notification templates, all fields except **Status** are unavailable for editing.
Description	Enter a brief description of the notification template.
Instructional Text	Enter more detailed information about the notification template.
Sender	Select the entity that sends the notification generated using this template. Values are: *Blackberry, Other, System,* and *User.*
Email	Enter the email address of the sender.
Subject	Enter the subject text of the email that the system generates using this notification template.
Message Text	Enter the message body text that the system generates using this notification template.
Send email as HTML	Select to generate the email resulting from this notification template in HTML format.

Include Attachments

Select the check boxes in this group box to include any attachments that are associated with the relevant **Class, Facility, Program,** or **Equipment** with the email that is generated using this notification template. For example, you create an enrollment confirmation notification and configure it to include **Facility** and

Class attachments. If there are attachments defined for the class the learner enrolled in or the facility in which the class is scheduled to take place, the system includes those attachments with the generated notification email.

Template Variables

This group box displays the variables associated with the selected **Notification Category.** You cannot modify, add, or delete any of these values, but you can use them in the template text to have them resolve when the system generates the notification without writing custom code to support and resolve the terms.

Configuring Notification Events

To modify notification events, use the Configure Notifications (LM_NOTIF_CONFIG) component.

Page Used to Configure Notification Events

Page Name	***Definition Name***	***Usage***
Configure Notification Events Page	LM_NOTIF_CONFIG	Modify notification events.

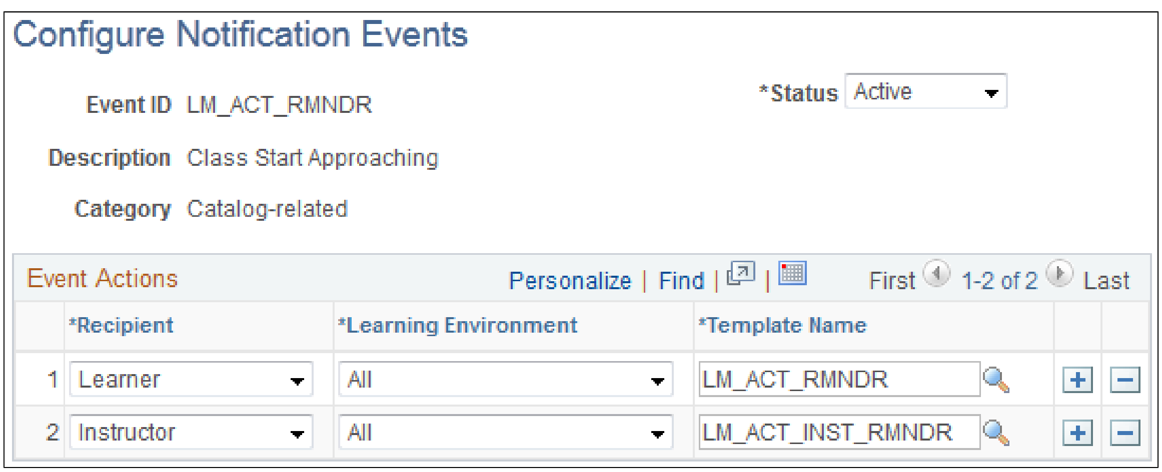
Configure Notification Events Page

Use the Configure Notification Events page (LM_NOTIF_CONFIG) to modify notification events.

Navigation:

Enterprise Learning > **Notifications** > **Configure Notifications** > **Configure Notification Events**

This example illustrates the fields and controls on the Configure Notification Events page.



Field or Control	***Description***
Status	Select whether the notification event is *Active* or *Inactive.* You cannot delete a delivered notification event, but by setting its status to *Inactive,* you prevent the system from generating any notifications that are triggered by it.
Recipient	Select a recipient for the notification triggered by the event action. The values available for this field depend on the notification event you are configuring.
Learning Environment	Select a learning environment for the event action. The values available in this field are the learning environments that you have configured for your system and *All.*
Template Name	Select the template of the notification you want generated by the event action.

Creating and Sending Ad Hoc Notifications and Announcements

Page Used to Create Ad Hoc Notification and Announcements

Page Name	***Definition Name***	***Usage***
Ad Hoc Notify and Announce Page	LM_NOTIF_ADHOC	Create ad hoc notifications and announcements.
Process Ad Hoc Notifications Page	RUNCTL_NOTIF_ADHOC	Send and post all ad hoc notifications and announcements with posting dates up to and including the current date.

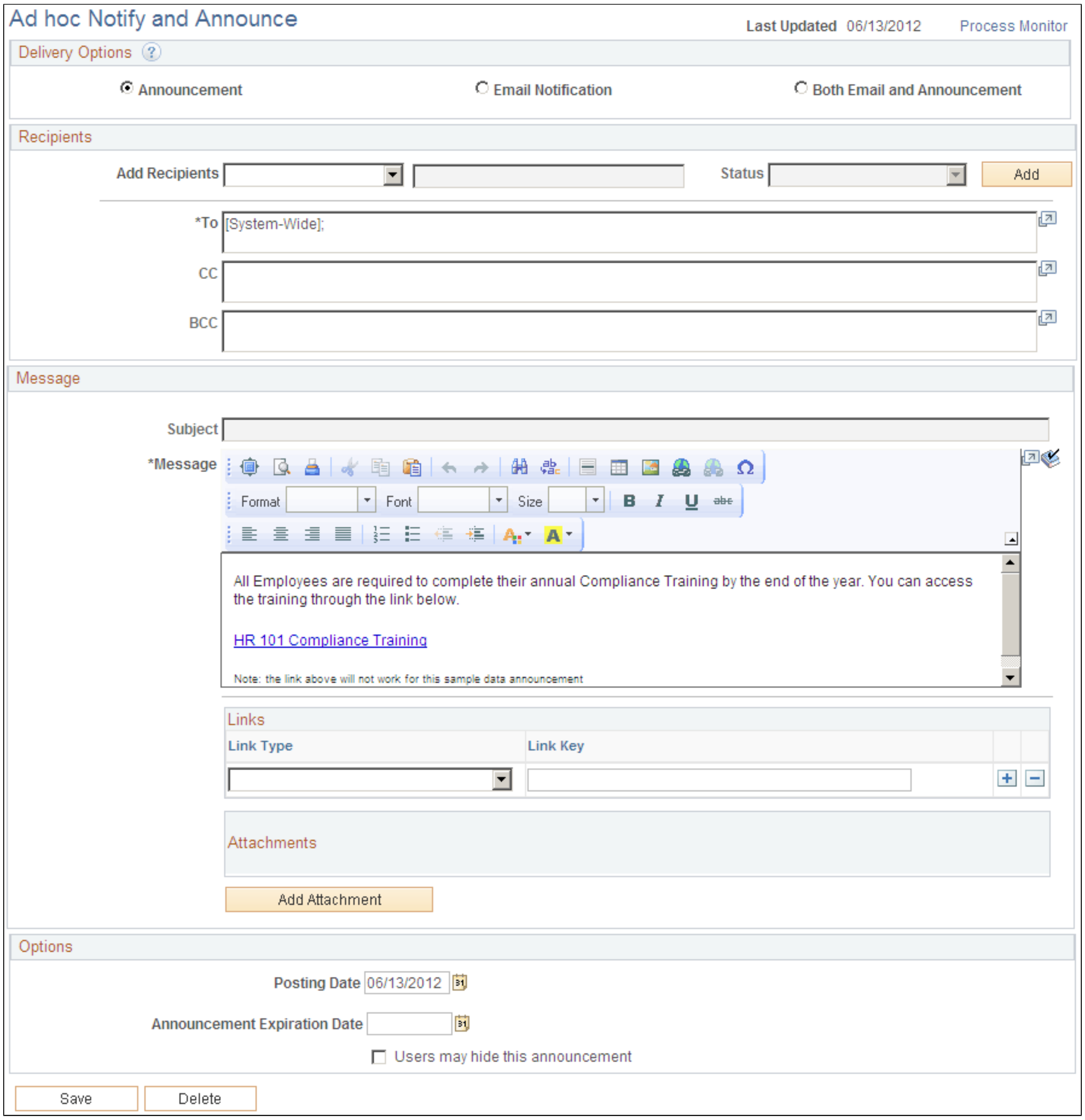
Ad Hoc Notify and Announce Page

Use the Ad Hoc Notify and Announce page (LM_NOTIF_ADHOC) to create ad hoc notifications and announcements.

Navigation:

Enterprise Learning > **Notifications** > **Ad hoc Notify and Announce**

This example illustrates the fields and controls on the Ad Hoc Notification page.



Delivery Options

Specify how you want to deliver the ad hoc information.

Field or Control	***Description***
Announcement	Select to deliver the ad hoc information as an announcement. The announcement you create appears in the Announcements pagelet of the Learning Home for the specified recipients.

Field or Control	*Description*
Email Notification	Select to deliver the ad hoc information as an email notification. The system sends the notification you create to the specified recipients in an email.
Both Email and Announcement	Select to deliver the ad hoc information as both an announcement and an email notification.

Recipients

Field or Control	*Description*
Add Recipients	Select a category of recipients on which you can search. Values are: *Class, Customer, Department, Job Code, Learner Group, Learning Environment, Program,* and *System-Wide.* When you select a recipient category other than *System-Wide*, a field with a label identical to that recipient category becomes available to the right of the **Add Recipients** field.
Class, Customer,Department, Job Code, Learner Group, Learning Environment, and **Program**	Look up and enter the ID of the class, customer, department, job code, learner group, learning environment, or program you want to receive the ad hoc information.
Status	If you select the recipient category of *Class* or *Program*, select the class or program status of the recipients you want to receive the ad hoc information.
Add	Click to add the email address of the ID you selected in the **Class, Customer, Department, Job Code, Learner Group, Learning Environment,** or **Program** field to the **To** field.
To	Includes any addresses added using the **Add** button. In addition, you can use this field to manually enter the addresses of the recipients to whom you want to send the ad hoc notification.
CC (carbon copy)	Enter the addresses of the recipients to whom you want to send a copy of the ad hoc notification.
BCC (blind carbon copy)	Enter the addresses of the recipients to whom you want to send a blind copy of the ad hoc notification.

Message

Field or Control	***Description***
Subject	Enter the subject text of the ad hoc notification or announcement. **Note:** This field is not available if you select the **Announcement** delivery option.
Message	Enter the message text of the ad hoc notification or announcement.
Link Type and **Link Key**	Select the type of link you want to add to the ad hoc information along with a link key. **Link Type** values are: • *Class:* Links with this type take the user to the Class Details page for the class you select in the **Link Key** field. • *Course:* Links with this type take the user to the <Course Name> page for the course you select in the **Link Key** field. • *Location:* Links with this type take the user to the Find Learning page with search results for the location you select in the **Link Key** field. • *Program:* Links with this type take the user to the Program Details page for the program you select in the **Link Key** field. • **Search Text:** Links with this type take the user to the Find Learning page with search results for the text you enter in the **Link Key** field.
Add Attachment	Click to attach a file to the ad hoc notification or announcement. The **Attachments** group box displays the files you add as attachments.

Options

Field or Control	*Description*
Posting Date	Enter the date on which the system posts this announcement in the Announcements pagelet of the Learning Home or sends the notification email when you run the Process Ad Hoc Notifications (LM_NOTIF_ANN) process.
Announcement Expiration Date	Enter the date on which the system removes this announcement from the Announcements pagelet of the Learning Home. **Note:** This field is not available if you select **Email Notification** as a delivery option.
Users may hide this announcement	Select to give your learners the option to hide the announcement after they have read it. **Note:** This field is not available if you select **Email Notification** as a delivery option.
Save	Click to save the ad hoc information. When you click Save and the Posting Date is equal to the system date, the system queues the Process Ad Hoc Notifications (LM_NOTIF_ANN) process in the Process Monitor.

Related Links

Process Ad Hoc Notifications Page
Find Learning Page
Using the Learning Home Pagelets

Process Ad Hoc Notifications Page

Use the Process Ad Hoc Notifications page (RUNCTL_NOTIF_ADHOC) to send and post all ad hoc notifications and announcements with posting dates up to and including the current date.

Navigation:

Enterprise Learning > **Notifications** > **Process Ad hoc Notifications**

Field or Control	Description
Run	Click to run the Process Ad Hoc Notifications (LM_NOTIF_ANN) application engine process. This process sends any unsent email notifications with a posting date up to and including the current date. It posts any unposted announcements with a posting date up to and including the current date to the Announcements pagelet for the specified recipients. In addition, the system removes any announcements with an expiration date greater than the current date from the Announcements pagelet.

Related Links

Ad Hoc Notify and Announce Page
Using the Learning Home Pagelets

Chapter 30

Understanding the Completion Engine

Understanding the Learning Component Completion Engine

This topic discusses:

- Learning component completion engine.
- Learning component completion statuses.
- Learning component completion rules.
- Learning component attendance statuses.
- Learning component passing statuses.

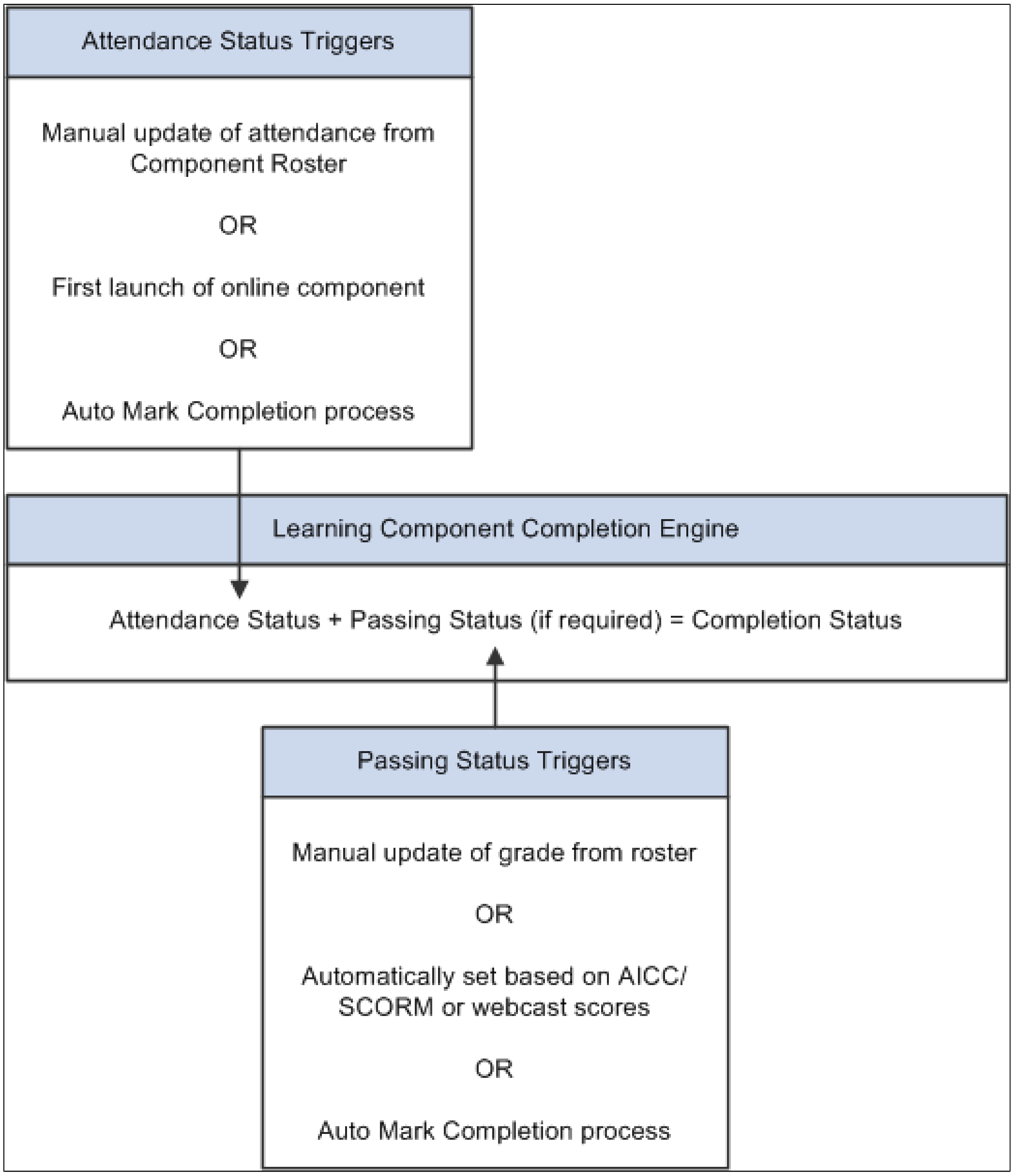
Learning Component Completion Engine

The learning component completion engine automatically determines the completion status for a learning component based on the attendance and passing statuses for that learning component. When the attendance or passing status is updated, the learning component completion engine is triggered to update the completion status for that learning component. There are four ways the attendance or passing status can be updated:

- Manually (attendance status only), by an instructor or administrator on the Component Roster page.
- Automatically, by Sharable Content Object Reference Model (SCORM) or Aircraft Industry Computer Based Training Committee (AICC) compliant content.
- Automatically, through webcast integration.
- Automatically, by the Auto Mark Class Completion Application Engine process (LM_AUTOATTD). You must select the **Auto Mark Completion** check box on the Class Details page to engage this automatic update.

Attendance and passing status are the two values that determine a learner's completion status for a given learning component. A learner must be marked as having attended and passed a learning component to get credit for having completed the learning component. However, for cases where the learning component has been defined as not requiring passing, the attendance status is the only value that determines the completion status. In this case, the learner would only have to do be marked as having attended that learning component to complete it. The learner would not be required to pass it.

The following diagram illustrates the various attendance status and passing status triggers and how the learning component completion engine works.



The triggers determine the attendance status and passing status. The learning component completion engine uses the attendance status and passing status (if passing is required) to calculate the completion status.

Learning Component Completion Statuses

The following table presents an overview of the fields and values that affect completion at the learning component level:

Learning Component Field	***Possible Values***	***How Value is Set***
Completion Status	• Not attempted • In progress • Completed • Not completed	• Automatically, based on the attendance and passing status for the learning component. • If passing is not required then attendance is the only value that determines completion. • Assignment learning components can be marked as completed directly by the learner or manager on the Assignment Progress page, or administrator on the Component Roster page.
Attendance **Note:** Attendance value names can be changed on the Attendance Scheme page. However, when you change or add an attendance status it must be tied to a delivered attendance status so the completion engine knows how to interpret it.	• Unknown • Attended • Did not attend	• Manually, when an instructor or administrator makes changes on the Component Roster page. • Automatically, when the learner first launches content from a web-based, test, or survey learning component. • Automatically, when the learner launches the last session of a webcast component. • Automatically, by the Auto Mark Class Completion process.
Passing Status **Note:** Passing status values can be changed on the Passing Scheme page. However, when you change or add a passing status it must be tied to a delivered passing status so the completion engine knows how to interpret it.	• Pass • Fail • Pending • Not marked • Not required	• Automatically, when SCORM or AICC compliant content provides the learner's scores and the completion engine compares these scores with the minimum passing score required for the learning component. • Automatically, by the Auto Mark Class Completion process.
Grade	Custom defined values defined on the Grading Scheme page.	Manually, when an instructor or administrator enters the grade on the Roster page.

Learning Component Field	***Possible Values***	***How Value is Set***
Score	Free form numeric field.	• Automatically, when derived from lesson scores passed back from SCORM or AICC compliant content. • Autonomically, when received from webcast vendor. • Manually, when an instructor enters the score on the Roster page. Note however, that in this case the system will not automatically update the attendance or passing status based on the minimum score. The instructor must manually update those statuses.

Learning Component Completion Rules

The completion engine determines the completion status by comparing the attendance status and passing status to the rules that determine when a learner has successfully completed a learning component. The following table provides the rules the completion engine uses to determine completion status:

Learning Component Attendance Status	***Plus***	***Learning Component Passing Status***	***Equals***	***Learning Component Completion Status***
Unknown	+	• Pass • Fail • Pending • Not marked • Not required	=	Not attempted
Attended	+	Pending	=	In progress
Attended	+	• Pass • Not required	=	Completed
Attended	+	• Fail • Not marked	=	Not completed

Learning Component Attendance Status	***Plus***	***Learning Component Passing Status***	***Equals***	***Learning Component Completion Status***
Did not attend	+	• Pass • Fail • Not marked • Not required • Pending	=	Not completed

Learning Component Attendance Statuses

Depending on the basic learning component type, attendance status values are set one of three ways:

- Manually, when an instructor or administrator makes changes on the Component Roster page.
- Automatically, when the learner first launches the web-based, survey, or test learning component content or the last session in a webcast learning component.
- Automatically, by the Auto Mark Class Completion process.

  See Understanding the Auto Mark Class Completion Process.

The following table shows how each attendance status value can be set based on the learning component type:

Basic Learning Component Type	***Unknown***	***Attended***	***Did Not Attend***
Sessions	Default Value	• Manually, when an instructor or administrator makes changes on the Component Roster page. • Automatically, by the Auto Mark Class Completion process.	Manually, when an instructor or administrator makes changes on the Component Roster page.
Webcast	Default Value	• Manually, when an instructor or administrator makes changes on the Component Roster page. • Automatically, when the learner launches the last session in the webcast.	• Manually, when an instructor or administrator makes changes on the Component Roster page. • Automatically, by the Auto Mark Class Completion process.

Basic Learning Component Type	***Unknown***	***Attended***	***Did Not Attend***
Web-based, Test, or Survey (compliant or noncompliant)	Default Value	• Manually, when an instructor or administrator makes changes on the Component Roster page. • Automatically, when the learner first launches the online content.	• Manually, when an instructor or administrator makes changes on the Component Roster page. • Automatically, by the Auto Mark Class Completion process.
Assignment	Attendance is not tracked.	Attendance is not tracked.	Attendance is not tracked.

Learning Component Passing Statuses

Depending on the basic learning component type, passing status values are set one of four ways:

- Automatically, when an instructor or administrator enters a grade on the Component Roster.

  Grades are associated with passing statuses. When a particular grade is selected for the learner the completion engine automatically updates the passing status by comparing the grade with the minimum grade required to pass, as defined on the Grading Scheme page.

- Automatically, when derived from lesson scores passed back from SCORM or AICC compliant content.

  The completion engine automatically updates the passing status by comparing a score that is derived from the lesson scores that were sent back from the compliant content with the minimum score required for passing, as set on the Completion page.

  See SCORM and AICC Compliance.

- Automatically, when derived from scores retrieved from webcast vendors.

  Some webcast vendors provide learner's scores. The Auto Mark Class Completion process retrieves scores from webcast vendors and posts the scores to the Component Roster page. This triggers the completion engine, which compares the scores with the minimum score required for passing, as defined on the Completion page.

- Automatically, by the Auto Mark Class Completion application engine process (LM_AUTOATTD). You must select the **Auto Mark Completion** check box on the Classes - Class Details page to engage this automatic update.

  See Understanding the Auto Mark Class Completion Process.

The following table shows how each passing status value can be set based on the basic learning component type:

Basic Learning Component Type	***Pending***	***Pass***	***Fail***	***Not Marked***	***Not Required***
Session	Default value.	• Automatically, when an instructor or administrator enters a grade on the Component Roster. • Automatically, by the Auto Mark Class Completion process.	Automatically, when an instructor or administrator enters a grade on the Component Roster.		Automatically, when passing is not required for learning component (which is set on the Completion page).
Webcast	Default value.	• Automatically, when an instructor or administrator enters a grade on the Component Roster. • Automatically, when derived from scores retrieved from the webcast vendors by the Auto Mark Class Completion process.	• Automatically, when an instructor or administrator enters a grade on the Component Roster. • Automatically, when derived from scores retrieved from the webcast vendors by the Auto Mark Class Completion process.	Automatically, by the Auto Mark Class Completion process (when the process expects to retrieve lesson scores but does not).	Automatically, when passing is not required for learning component (which is set on the Completion page).

Basic Learning Component Type	***Pending***	***Pass***	***Fail***	***Not Marked***	***Not Required***
Compliant Web-Based, Survey, and Test	Default value.	• Automatically, when an instructor or administrator enters a grade on the Component Roster. • Automatically, when derived from lesson scores retrieved from the SCORM or AICC compliant content by the Auto Mark Class Completion process.	• Automatically, when an instructor or administrator enters a grade on the Component Roster. • Automatically, when derived from lesson scores retrieved from the SCORM or AICC compliant content by the Auto Mark Class Completion process.	Automatically, by the Auto Mark Class Completion process (when the process expects to retrieve lesson scores but does not).	Automatically, when passing is not required for learning component (which is set on the Completion page).
Non Compliant Web-Based, Survey, and Test	Default value.	Automatically, when an instructor or administrator enters a grade on the Component Roster.	Automatically, when an instructor or administrator enters a grade on the Component Roster.	Automatically, by the Auto Mark Class Completion process.	When passing is not required for learning component (which is set on the Completion page).
Assignment	Passing status is not tracked.	Passing status is not tracked.	Passing status is not tracked.	Passing status is not tracked.	Passing status is not tracked.

Understanding the Class Completion Engine

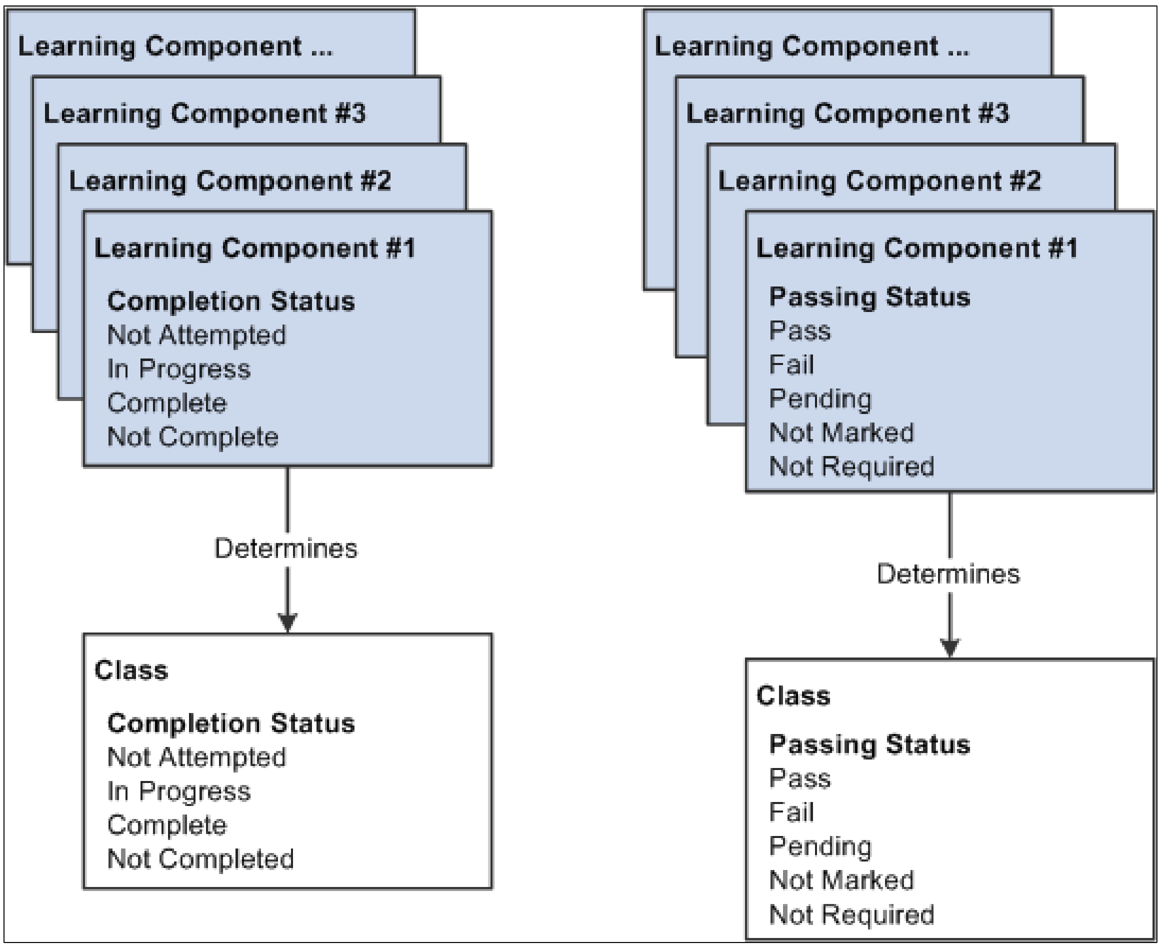
This topic discusses:

- Class completion engine.
- Class completion statuses.
- Required and optional learning components.
- Class completion rules for completion status.
- Class completion rules for passing status.

Class Completion Engine

The class completion engine automatically updates the class completion and passing status whenever a change is made to the completion status at the learning component level. Passing status and completion status are derived fields at the class level, users cannot update them manually. The class completion engine determines the passing and completion status for a class by evaluating the completion status and passing status in every required learning component within the class. The only exception to this is when the class contains a test out learning component. When a learner passes a test out he or she completes the class.

The following diagram illustrates how the completion and passing status for each learning component determines the completion and passing status at the class level.



To successfully complete a class a learner must achieve a passing status of pass (if passing is required) and a completion status of complete.

Class Completion Statuses

The following table presents an overview of the fields and values that affect completion at the class level:

lass Field	Possible Values	How Value is Set
Completion Status	• Enrolled • In progress • Complete • Not completed	Automatically, when an update has been made to the completion status at the learning component level.
Passing Status **Note:** Passing status value names can be changed on the Passing Scheme page. However, when you change or add a passing status it must be tied to a delivered passing status so the completion engine knows how to interpret it.	• Pass • Fail • Pending • Not marked • Not required	Automatically, when an update has been made to the passing status at the learning component level.
Grade	Custom defined values defined on the Grading Scheme page.	Manually, when an instructor or administrator enters the grade on the Class Roster page.

Required and Optional Learning Components

Learning components for a class can be either required or optional, but there must be at least one required learning component within a class.

The class completion engine derives the class completion status from the completion statuses of each *required* learning component in the class. A learner can not complete a class unless he or she completes every required learning component in that class. That is, the learner must have a completion status of complete for all required learning components within a class to earn a completion status of complete in the overall class.

The learner's performance on optional components will not affect his or her class completion status, unless the class contains an optional test out learning component. If a learner passes and completes an optional test out learning component he or she passes and completes the class.

Class Completion Rules for Completion Status

The class completion engine updates the class completion status whenever a change is made to any of the learning component completion statuses within the class. The following table provides the rules the completion engine uses to determine the class completion status:

Learning Component Completion Statuses	Equals	Class Completion Status
All components are not attempted.	=	Enrolled

Learning Component Completion Statuses	***Equals***	***Class Completion Status***
At least one component is in progress, complete, or not completed.	=	In progress
All required components are complete.	=	Complete
At least one required component is not complete and all remaining required components have been marked complete or not completed.	=	Not completed
All test outs are complete.	=	Complete

Class Completion Rules for Passing Status

The class completion engine updates the class passing status whenever a change is made to any of the learning component completion statuses within the class. The following table provides the rules the completion engine uses to determine the class passing status:

Learning Component Passing Statuses	***Equals***	***Class Passing Status***
All required learning components are passed.	=	Pass
All test out test learning components are complete.	=	Pass
At least one required learning component is failed.	=	Fail
At least one required learning component is pending.	=	Pending
All required learning components are not marked.	=	Not marked
All learning components are not required.	=	Not required

Note: Passing status value names can be changed on the Passing Scheme page. However, when you change or add a passing status it must be tied to a delivered passing status so the completion engine knows how to interpret it.

Chapter 31

Managing Attendance and Grading

Understanding Attendance and Grading

This topic lists prerequisites and common elements and discusses attendance and grading.

Prerequisites

Before you can mark grades and attendance, you must:

- Define attendance schemes.
- Define passing schemes.
- Define grading schemes.
- Enroll learners in classes.

  See Modifying Passing, Grading, and Attendance Schemes.

  See Understanding Enrollment and Registration.

Common Elements

Field or Control	***Description***
(Download)	Click the **Generate Spreadsheet** button to access Excel and have roster data entered into a spreadsheet.

Attendance and Grading

Enterprise Learning Management provides class rosters that administrators and instructors can use to manage attendance and grading for classes. Instructors can also access class rosters through the Instructor Schedule component, which they use to review their teaching schedules. Tracking attendance and grades is not applicable for programs (curricula and certifications).

Administrators and instructors can use the class rosters to manually mark grades and attendance and enter scores for classes and their components. They can also override any attendance statuses, passing statuses, and scores that have been automatically updated by Sharable Content Object Reference Model (SCORM) or Aircraft Industry Computer Based Training Committee (AICC) compliant content. Administrators and instructors can override attendance and grades for a class without changing the attendance and grading information for the class's components. Enterprise Learning Management also provides a process for automatically marking attendance and passing statuses for learners.

Enterprise Learning Management delivers default attendance, passing, and grading schemes that list the values that instructors and administrators can use to mark a learner's attendance status, passing status, and grade for each learning component within a class. You can modify the delivered values to match the requirements of the organization. Define attendance, passing, and grading schemes on the Attendance Schemes, Grading Schemes, and Passing Scheme pages.

Note: The system does not track attendance, passing status, grades, or scores for assignment learning components. Instructors and administrators can mark the completion status manually through the roster pages. Depending on the settings on the Assignment Component setup page, learners and managers can also mark completion status through the self-service pages.

Related Links

Understanding Class Rosters

Managing Attendance and Grading for Classes

Pages Used to Manage Attendance and Grading for Classes

Page Name	***Definition Name***	***Usage***
Administer Class Roster Page	LM_ROSTER_SRCH	As an administrator, find and select class rosters for marking grades and attendance. Administrators can access all classes within their learning environment.
Mark Grades and Attendance Page	LM_INSTRUCTOR_SRCH	As an instructor, find and select class rosters for marking grades and attendance. Instructors can access only class rosters for which they are the instructor. Pages within the Mark Grades and Attendance component are identical to the pages in the Administer Class Roster component.
Class Roster - Enrollment Status Page	LM_ACT_ROSTER	View the list of learners for a class and each learner's enrollment status. Administrators can also update enrollment statuses.
Class Roster - Grades and Attendance Page	LM_ACT_ROST	View the class roster, update learners' grades, attendance, and scores. This roster page shows only enrolled learners.
Add Comments Page	LM_ENRLMT_CMNTS	Add notes about a learner.

Page Name	***Definition Name***	***Usage***
Send Notification Page	LM_ENRLMT_NOTIF	As an administrator, send ad hoc email notifications to the learners on a class roster.
Component Roster Page	LM_LC_ROSTER	Enter attendance, grades, and scores for all learners for a specific learning component. View a learner's passing status and completion status for a component. For assignment components, update the completion status only.
Learner Roster Page	LM_LRNR_ROSTER	Enter attendance statuses, grades, and scores for a specific learner for all learning components within a class. View a learner's payment information. Also enter the learner's grade for the class and view the learner's enrollment status and passing status.
Assignment Progress Page	LM_LC_ASGN_PROG	Update the completion status for an assignment learning component, view and access associated links, and enter notes about the assignment.

Note: Some of the roster pages that are described in this topic can be used for grading and attendance as well as for other enrollment-related tasks. This topic focuses on the grading and attendance features only.

Related Links

Administering Enrollment-Related Tasks

Administer Class Roster Page

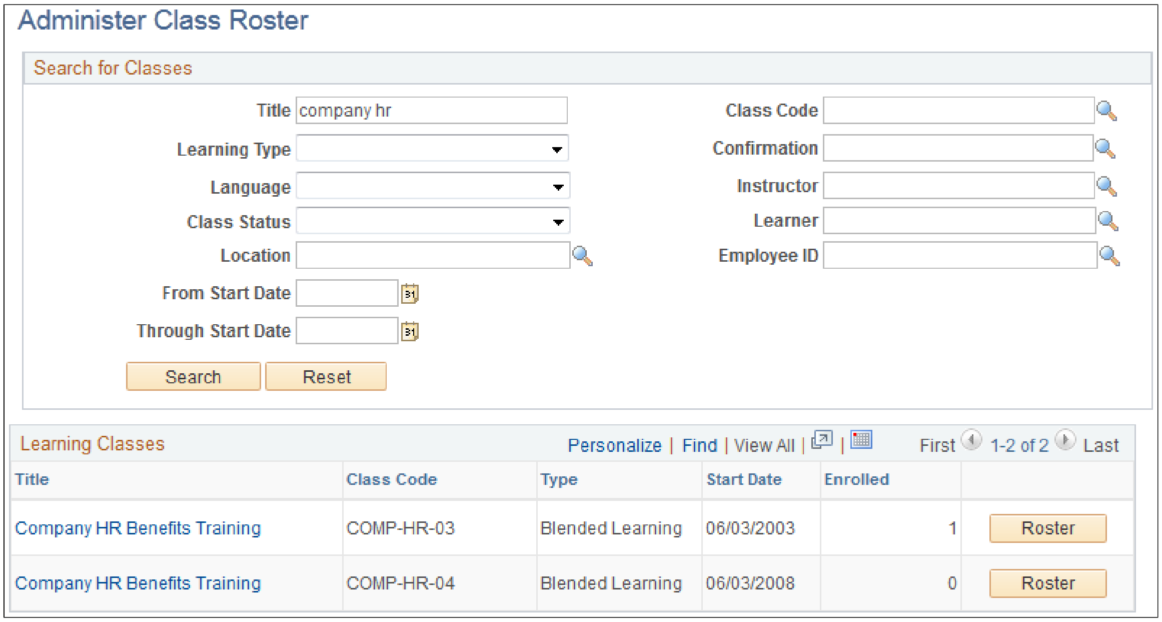
Use the Administer Class Roster page (LM_ROSTER_SRCH) to as an administrator, find and select class rosters for marking grades and attendance.

Administrators can access all classes within their learning environment.

Navigation:

Enterprise Learning > **Learner Tasks** > **Administer Class Rosters** > **Administer Class Roster**

This example illustrates the fields and controls on the Administer Class Roster page.



Search for Classes

Enter the search criteria and click the Search button to view the results.

Learning Classes

Select a class roster from the list of search results. For administrators, the system displays only classes that are in the administrator's learning environment. Instructors see only those classes that they are assigned to teach. Classes are sorted by class code. Click the Roster button for the class to display the Class Roster page.

Class Roster - Grades and Attendance Page

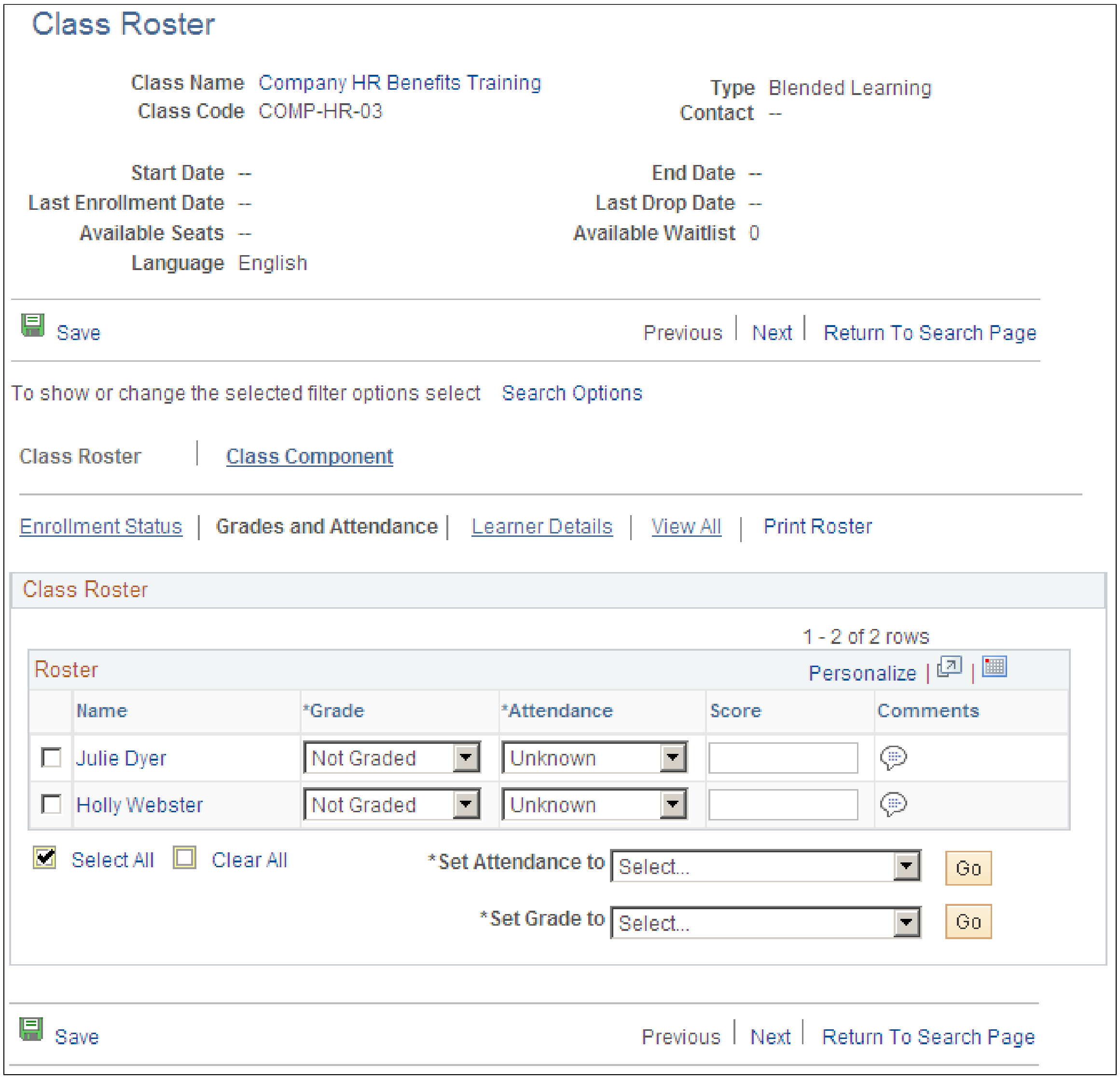
Use the Class Roster - Grades and Attendance page (LM_ACT_ROST) to view the class roster, update learners' grades, attendance, and scores.

This roster page shows only enrolled learners.

Navigation:

Click the **Grades and Attendance link** for a class on the Class Roster - Enrollment Status page.

This example illustrates the fields and controls on the Class Roster - Grades and Attendance page.



Search Criteria

To filter the list of learners to review, click the Search Options link that appears when you access this page. Enter the search criteria and click Search to display the results.

Class Roster

You can update an individual learner's grade, attendance status, and score or apply the same attendance status, grade, or both to a selected set of learners. Changing a learner's grade and attendance information for a class does not affect attendance and grade information entered for the class's components.

Field or Control	***Description***
Name	Click the learner's name link to access the Learner Information page, which displays high-level job and contact information about the user.
Grade	Select the learner's grade for the class. Grades at the class level are informational only and do not affect any other statuses.
Attendance	Select the learner's attendance status for the class.
Score	Enter the learner's score.
Comments	Click to access the Add Comments page, where you can enter comments about a learner's enrollment. The system displays the information that you enter in the **Comments** field on the self-service Class Progress page that learners and managers can access and on some reports. See Learning Reports.
Set Attendance to	Use this field to assign the same attendance status to multiple learners. Select the new status here, select the learners to update, and click Go.
Set Grade to	Use this field to assign the same grade to multiple learners. Select the grade here, select the learners to update, and click Go.

Component Roster Page

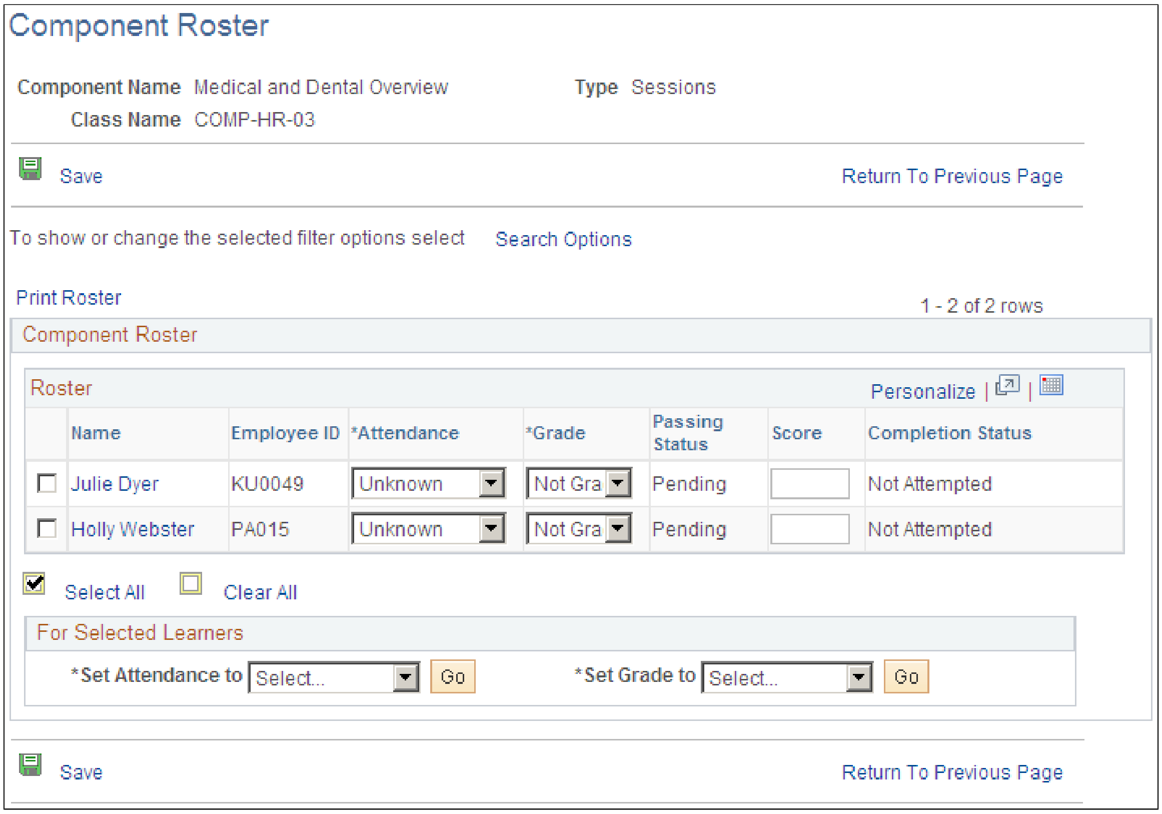
Use the Component Roster page (LM_LC_ROSTER) to enter attendance, grades, and scores for all learners for a specific learning component.

View a learner's passing status and completion status for a component. For assignment components, update the completion status only.

Navigation:

- Click the Class Component link on the Class Roster page to display a list of the components. Click the **Details** button for a learning component.
- Click a link in the **Session Roster** column on the View Schedule page.

This example illustrates the fields and controls on the Component Roster page.



Search Options

You can narrow the list of learners that the system displays for this learning component. This feature is helpful when you want to perform the same task for multiple learners, for example, mark attendance for all learners in a specific department or organization. It is also useful when you need to search for a single learner on a roster in which thousands of learners are enrolled. Enter your selection criteria and click the **Search** button to display learners that meet the selection criteria.

Field or Control	***Description***
First Name and **Last Name**	Enter the full or partial first name or last name of a learner.
Confirmation	Enter the learner's enrollment confirmation number to display a specific learner. The search ignores all other criteria.
From Date and To Date	Use this fields to select only those learners who completed the class within the date range that you specify and who meet the other search criteria.

Field or Control	*Description*
Completed, Incomplete, In-Progress, andNot Attempted	Select the corresponding check box to display all learners whose records match that completion status. You can select multiple check boxes to refine the search. By default, the system selects all check boxes.

Print Roster

This link appears only for session learning components. Click the Print Roster link to open a printable class roster in a separate browser window, in PDF format. The printable component roster includes only the learners displayed in the Roster grid. You can therefore use the same search filtering for the grid to filter the learners on the roster.

Note: The roster prints only for the learning component you are viewing.

Component Roster

Use this group box to update attendance, grades, and scores for each learner for the learning component. Each time updates are made to a learner's attendance status, passing status, or grade the learning component completion engine evaluates the information and makes updates to the learning component completion status as appropriate. The learning component completion engine does not evaluate any scores that you manually enter.

Field or Control	*Description*
Name	Click the learner's name link to access the Learner Information page, which displays high-level job and contact information about the user.
Attendance	Select an attendance status for the learner.
Grade	Select a grade for the learner. If you associate grades with passing statuses on the Grading Schemes page, the learning component completion engine updates the passing status of the learning component automatically.
Passing Status	Displays the learner's passing status for the component. When completion of the component is required to pass the class, the system updates the passing status based on the grade. The system sets the passing status for the learner to *Not Required* when passing is not a requirement to complete the learning component.

Field or Control	*Description*
Score	Enter a score for the learner. The system updates this value automatically when it receives lesson scores that are passed back from SCORM- or AICC- compliant content, and when the Auto Mark Class Completion process retrieves scores from webcast vendors. You can override the scores if necessary. Scores are informational only if the system does not require the learner to achieve a minimum score to pass the learning component. Define minimum score requirements for a learning component on the Completion page. The Auto Mark Class Completion process retrieves scores from third-party webcast vendors. For more information on scoring for SCORM and AICC compliant content, see Understanding Scoring for Compliant Content. **Important!** The learning component completion engine does not evaluate any scores that an instructor or administrator manually enters. The learning component completion engine does not make any changes to the attendance and passing statuses. Instructors and administrators must update the attendance or grade statuses manually to trigger the learning component completion engine. **Note:** Learners can view the scores entered here using the pages of the Class Progress (LM_SS_ACT_PROG) self-service component. See Maintaining Learning Records and Objectives Using Employee Self Service.
Completion Status	This column displays the current completion status of the learning component, which you cannot edit.

For Selected Learners

You can assign the same attendance status or grade to multiple learners at the same time. First, select the check box for each learner whose status you want to update. Next, select the attendance value or the grade in the Set Attendance to field or the Set Grade to field, as appropriate and click Go.

Field or Control	*Description*
Set Attendance to	Select an attendance status to assign to selected learners. The system does not display this option for assignment learning components because the system does not track attendance statuses to determine completion statuses for assignment learning components. Instructors and administrators must update the completion status for an assignment learning component manually.
Set Grade to	Select a grade to assign to all displayed learners. If you associate grades to passing statuses on the Grading Schemes page, the learning component completion engine updates the passing status for all learners for the learning component automatically. The system does not display this option for assignment learning components because it does not track grades to determine completion statuses for assignment learning components. Instructors and administrators must update the completion status for an assignment learning component manually.

Learner Roster Page

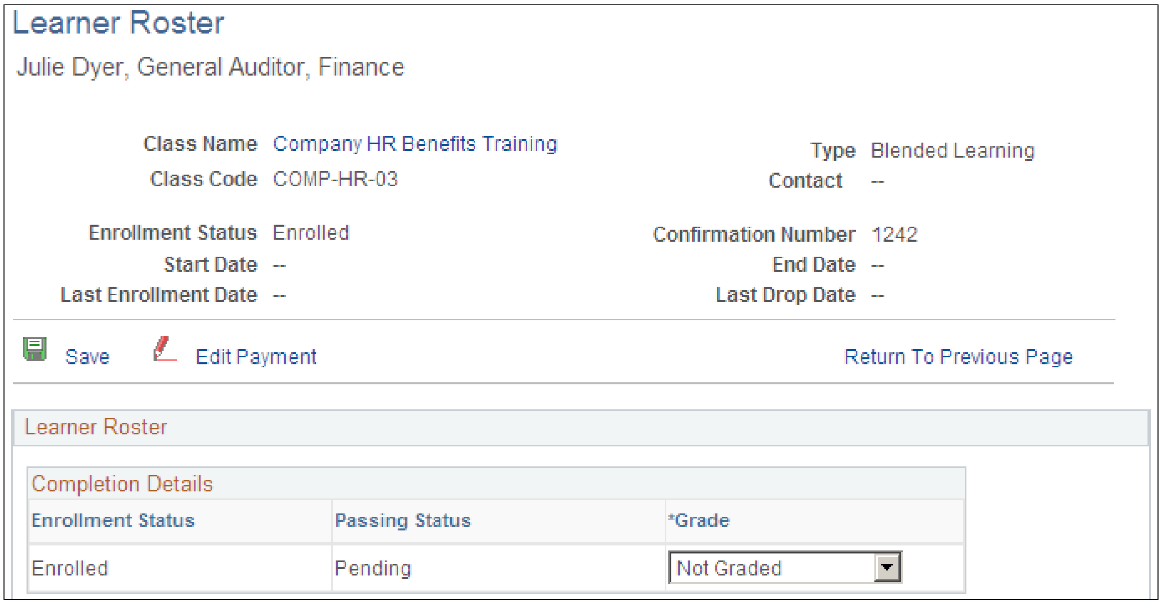
Use the Learner Roster page (LM_LRNR_ROSTER) to enter attendance statuses, grades, and scores for a specific learner for all learning components within a class.

View a learner's payment information. Also enter the learner's grade for the class and view the learner's enrollment status and passing status.

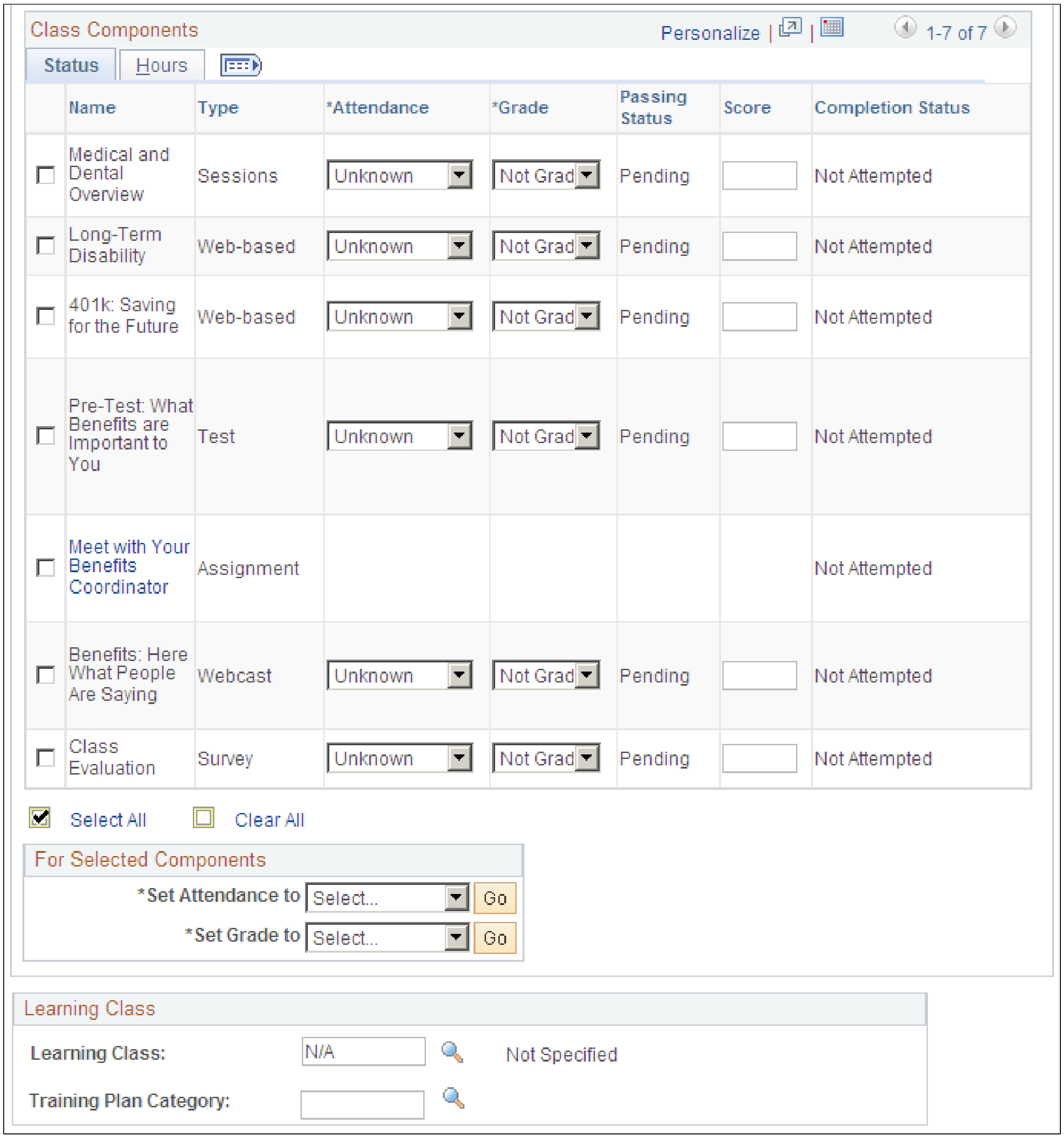
Navigation:

Click the **Details** button for a learner on the Class Roster page.

This example illustrates the fields and controls on the Learner Roster page (1 of 2).



This example illustrates the fields and controls on the Learner Roster page (2 of 2).



Completion Details

This group box displays the learner's current enrollment status and passing status for the class. The passing status is derived from the learner's passing statuses for the required learning components within the class. You can enter a grade for the learner for the class. Grades at the class level are information only and do not affect any other statuses.

Class Components

Use the Status tab to update the learner's attendance statuses, grades, and scores for all learning components within the class. This functionality is identical to the Component Roster group box on the Component Roster page.

For assignment components, you can click the name link to access the Assignment Progress page where you can enter the completion status and add notes.

See Component Roster Page.

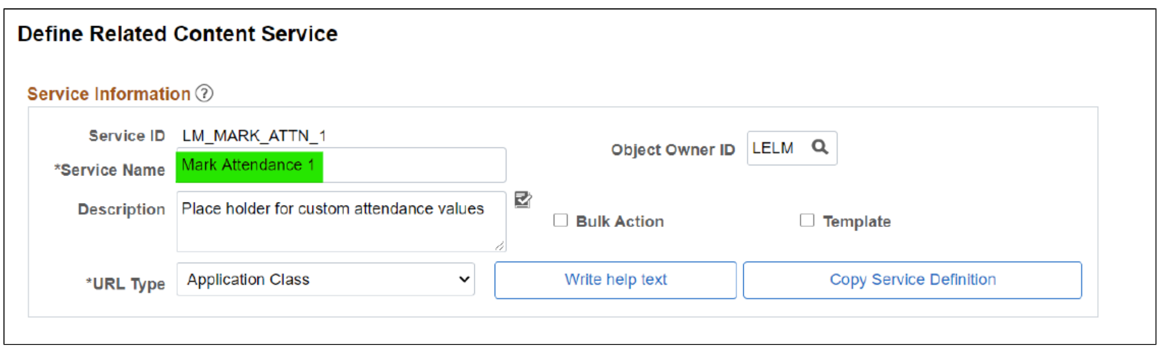
Setting Up Custom Attendance and Grade Scheme Values in Related Actions

As an administrator or as a learning instructor, you can define the custom values that need to appear in respective drop-down on all the pages. This topic discusses the set up required to make the custom attendance and grade scheme values available in the related actions.

To make the custom entries available in related actions:

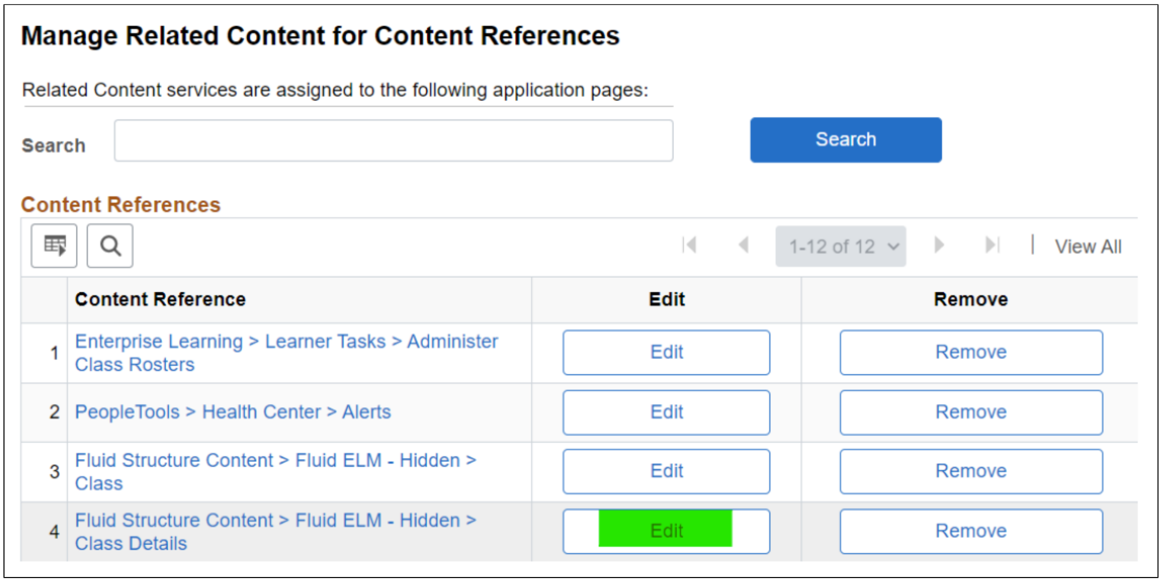
1. Navigate to PeopleTools, Portal, Related Content Service, Define Related Content Service.
2. Define/modify the service that needs to be included in the related actions. Choose the service definition you want to use based on the scheme customized and modify the label (highlighted in the screenshot below) to match the label of the custom scheme defined. The label should be exactly the same.

   Define Related Content Service Page

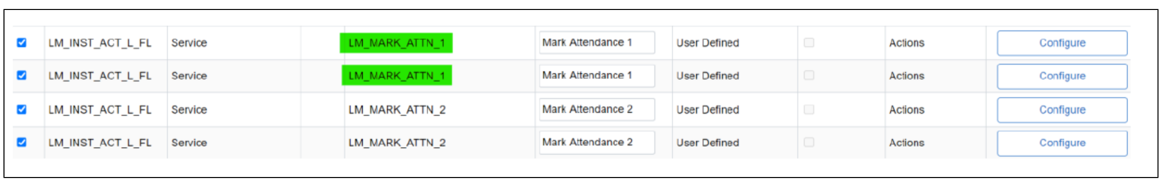
3. Navigate to PeopleTools, Portal, Related Content, Manage Related Content.
4. Modify the related content service configuration and define mapping value.
5. Edit the Content Reference ‘Fluid Structure Content > Fluid ELM- Hidden > Class Details’

Manage Related Content for Content References Page



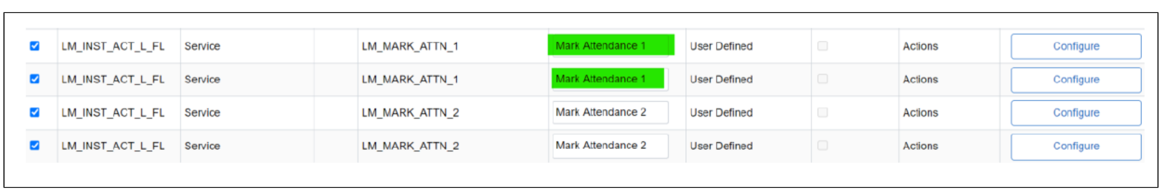
6. Go to 'Configure Related Actions' tab.
7. Find the service definition that was relabeled in the previous step. There will be two for each service, one for class roster action and another for learning component roster action.

Configure Related Actions Tab



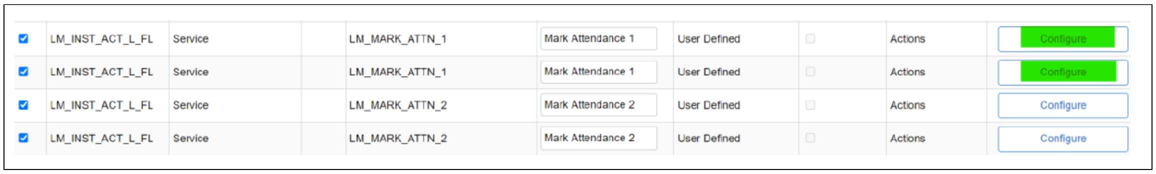
8. Modify the labels (highlighted in the screenshot below). This should match the label defined for the service.

Configure Related Actions Tab



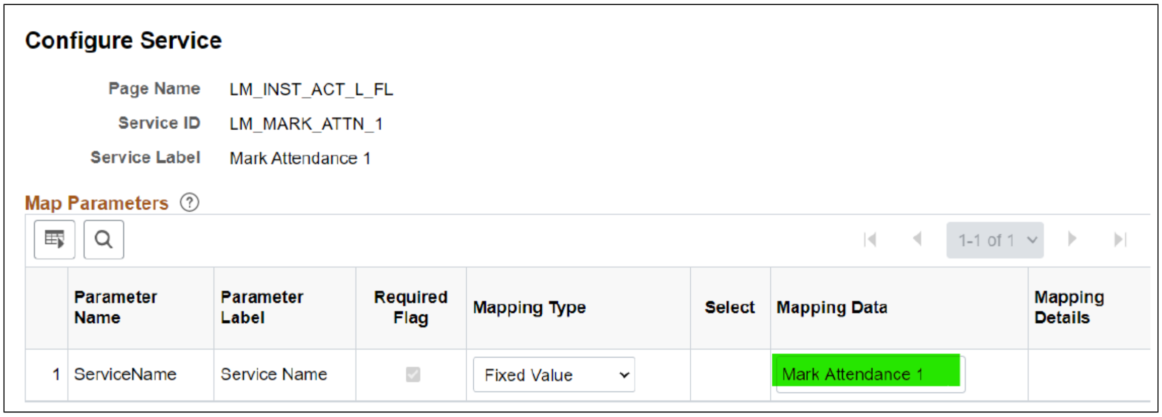
9. Next, define Mapping Value. Continuing from the previous step, select 'Configure'. This should be done for both entries of the service definition.

Configure Related Actions Tab



10. Under ‘Map Parameters’, update the mapping data to match the label of the service.

Configure Service Page



Note: Repeat the above steps for all the custom attendance and grade scheme definitions.

Accessing Instructor Schedules

Pages Used to Access Instructor Schedules

Page Name	*Definition Name*	*Usage*
View Schedule page	LM_LELW_INSTR_SCHE	View and filter teaching schedules, and launch webcasts.
View Schedule: Daily Page	LM_DAILY_VIEW	View instructor schedules by day.
View Schedule: Weekly Page	LM_WEEKLY_VIEW	View instructor schedules by week.
View Schedule: Monthly Page	LM_MONTHLY_VIEW	View instructor schedules by month.
Schedule Page	LM_LWC_SES_SCH_SP	View information for the scheduled session and webcast learning components such as the dates, and start and end times.

Page Name	***Definition Name***	***Usage***
Location Details Page	LM_ROOM_DTL_POP	View facility details such as the address, maximum occupancy, and accommodations.
Session Instructors Page	LM_INSTR_DTL	View instructors for the session and send emails to the instructors.

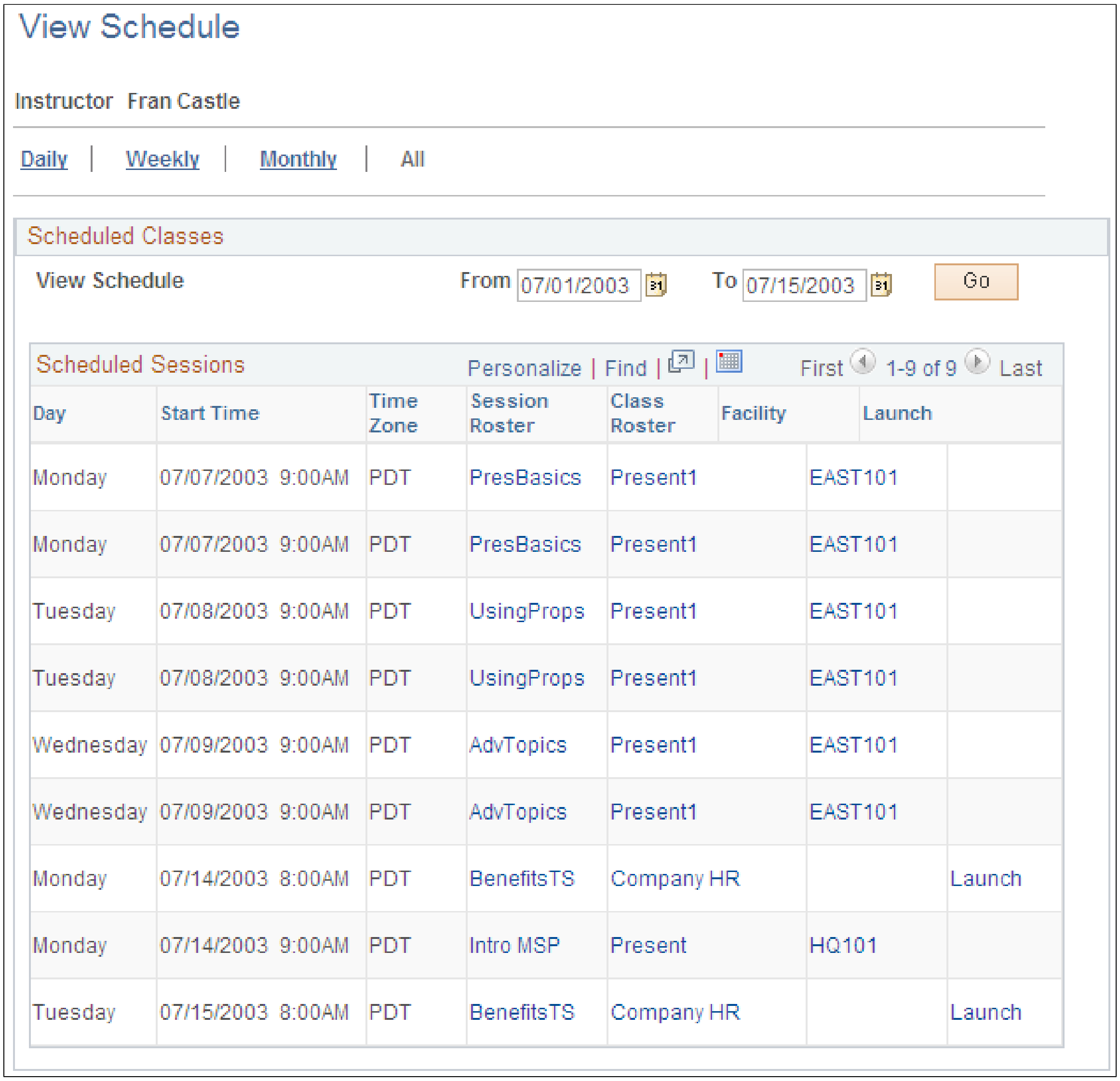
View Schedule page

Use the View Schedule page (LM_LELW_INSTR_SCHE) to view and filter teaching schedules, and launch webcasts.

Navigation:

Enterprise Learning > **Instructor Tasks** > **View Schedule**

This example illustrates the fields and controls on the View Schedule page.



Field or Control	***Description***
Daily,Weekly, and **Monthly**	Click these links to access a calendar view of the instructor's schedule. See View Schedule: Daily Page.

Scheduled Classes

Enter dates in the **From** and **To** fields and click the **Go** button to limit the sessions that the system displays to a specific date range.

Scheduled Sessions

Use this group box to view scheduled sessions and to access information for the sessions. The information that the system displays varies depending on the access privileges of the user. Instructors see only sessions for which they are the instructor. This component is not available for administrators.

Field or Control	*Description*
Session Roster	Click a link in this column to access the Component Roster page, where you can update statuses, grades, and scores for enrolled learners. See Component Roster Page.
Class Roster	Click a link in this column to access the Class Roster page, where you can view the class roster for the session. See Class Roster - Grades and Attendance Page.
Facility	Click a link in this column to access the Schedule page, where you can view schedule, facility, and instructor information for the session.
Launch	Click to launch the webcast session. Launch links are active as soon as the status for the class to which the learning component belongs is active. Define class statuses on the Maintain Classes - Class Details page.

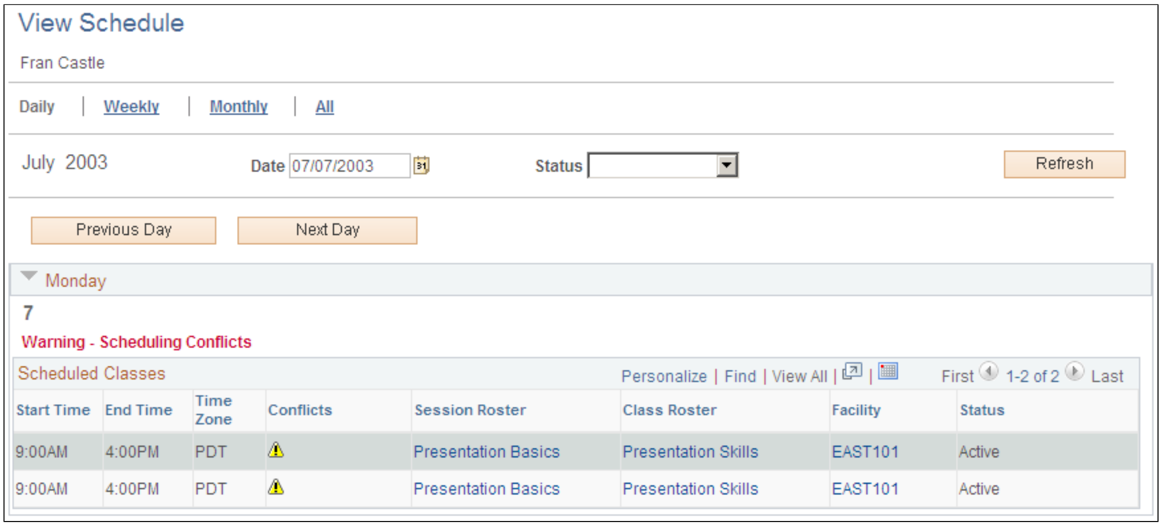
View Schedule: Daily Page

Use the View Schedule: Daily page (LM_DAILY_VIEW) to view instructor schedules by day.

Navigation:

Click the Daily link on the View Schedule page.

This example illustrates the fields and controls on the View Schedule: Daily page.



Instructors use this page to view their schedules for a specific day.

Field or Control	***Description***
Date and Status	Enter the date and status of the scheduled classes you want to view.
Refresh	Click to view the scheduled classes with the date and status you specified.
Session Roster	Click a link in this column to access the Component Roster page, where you can update statuses, grades, and scores for enrolled learners. See Component Roster Page.
Class Roster	Click a link in this column to access the Class Roster page, where you can view the class roster for the session. See Class Roster - Grades and Attendance Page.
Facility	Click a link in the column to access the Location Details page, where you can view information about the facility in which the session is being taught.
Launch	Click to launch the webcast session. Launch links are active as soon as the status for the class to which the learning component belongs is active. Define class statuses on the Classes - Class Details page.

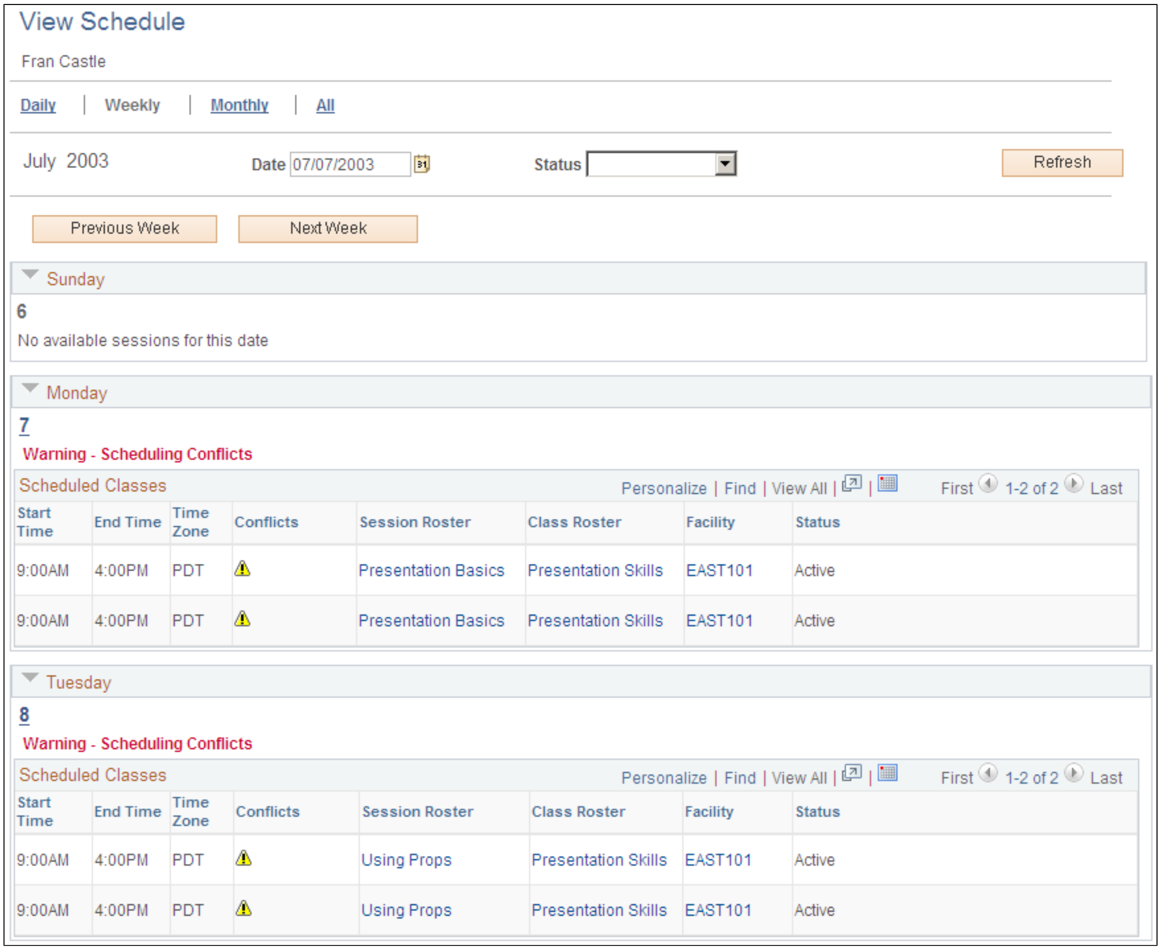
View Schedule: Weekly Page

Use the View Schedule: Weekly page (LM_WEEKLY_VIEW) to view instructor schedules by week.

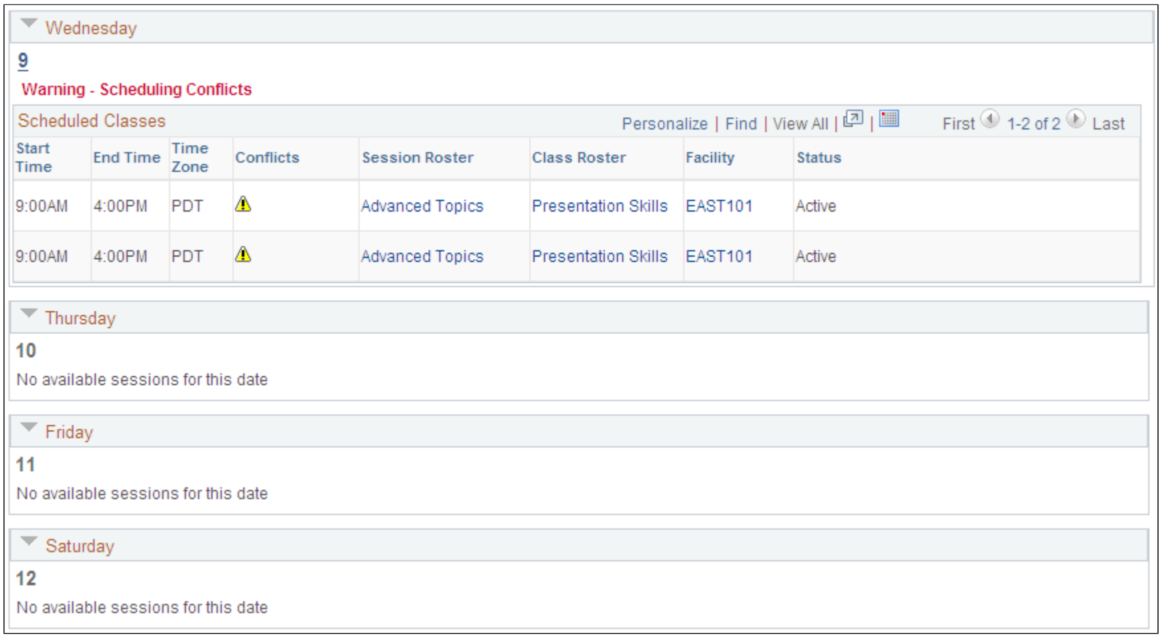
Navigation:

Click the Weekly link on the View Schedule page.

This example illustrates the fields and controls on the View Schedule: Weekly page (1 of 2).



This example illustrates the fields and controls on the View Schedule: Weekly page (2 of 2).



Instructors use this page to view their schedules for a specific week.

The fields on this page are identical to those on the View Schedule: Daily page.

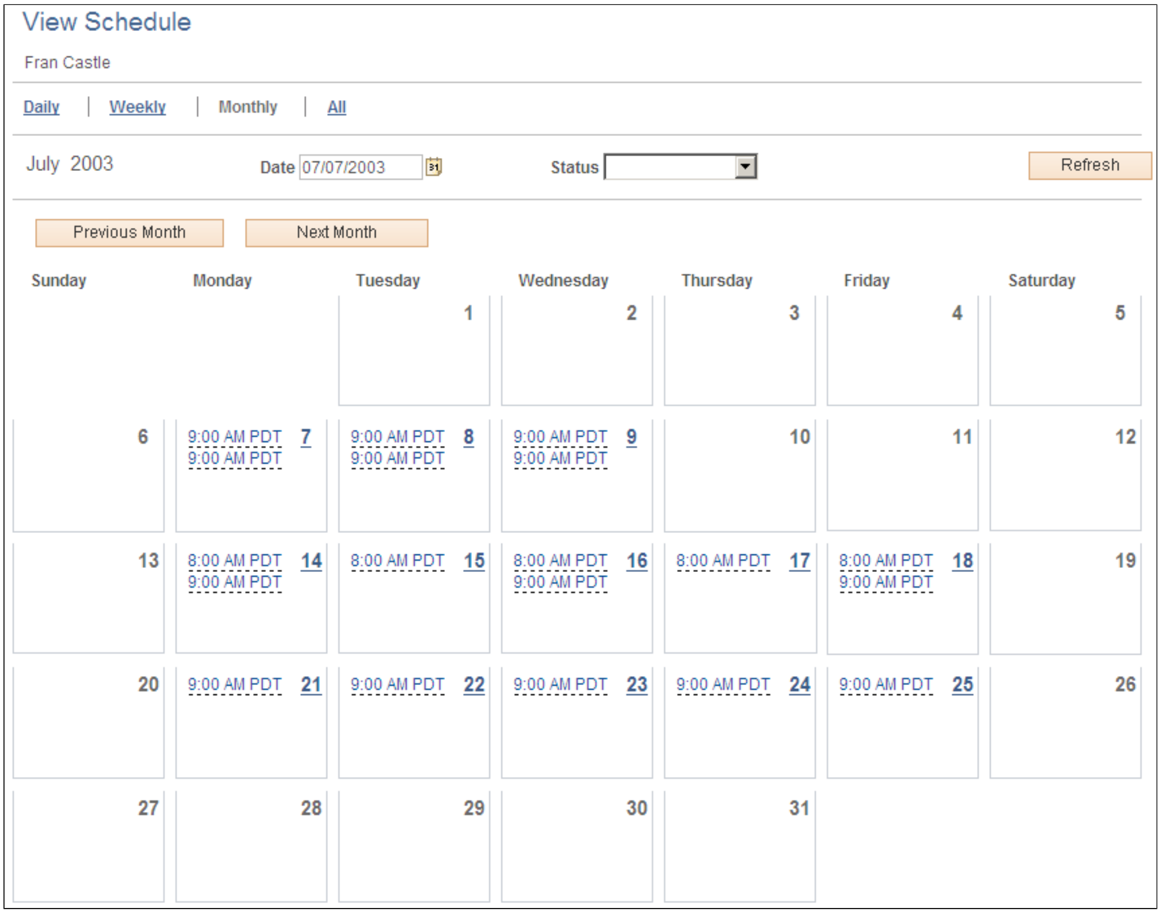
View Schedule: Monthly Page

Use the View Schedule: Monthly page (LM_MONTHLY_VIEW) to view instructor schedules by month.

Navigation:

Click the Monthly link on the View Schedule page.

This example illustrates the fields and controls on the View Schedule: Monthly page.



Instructors use this page to view their schedules for a specific month. Click a date link to view the schedule for that day on the View Schedule: When you mouse over a time link, the Scheduled Class page displays basic details for the session. Daily page. Click a time link to access the Class Roster page, where you can view the class roster for the scheduled session.

See Class Roster - Grades and Attendance Page.

The rest of the fields on this page are identical to those on the View Schedule: Daily Page.

Marking Attendance and Passing Statuses Automatically

Page Used to Mark Attendance and Passing Statuses Automatically

Page Name	***Definition Name***	***Usage***
Auto Mark Class Completion	LM_AUTOATTD_RUNCTL	Run the Auto Mark Class Completion process.

Understanding the Auto Mark Class Completion Process

The Auto Mark Class Completion (LM_AUTOATTD) process reduces the amount of manual work required by an instructor or administrator to mark attendance and passing statuses for learners in a class. Marking attendance and passing statuses for all learners across all learning components within a class can take a considerable amount of time for classes that have large rosters or for classes that are made up of many learning components.

The Auto Mark Class Completion process runs only on classes in which an administrator has selected the **Auto Mark Completion** check box on the Classes - Class Details page. Each time the process runs, it searches for eligible classes and marks attendance for those rosters. A class is eligible when one of three conditions is met:

1. The learning period date for the class has been reached.

   Learning period is set on the Classes - Class Details page.

2. The end date for the class has been reached.

   Class end dates are set on the Classes - Class Details page.

3. The end date for the class has been reached and the number of days entered in the **Mark Completion After** field on the Classes - Class Details page has been met.

Note: Attendance and passing status values can be changed on the Attendance Scheme and Passing Scheme pages. However, when you change or add a attendance or passing statuses they must be tied to delivered statuses so the completion engine knows how to interpret them.

For these classes, the Auto Mark Class Completion process updates the attendance status for all learners across all required learning components where the completion status is not attempted or in progress.

Note: The process does not overwrite any attendance statuses for learners that instructors or administrators manually enter.

If passing is required for the learning component, the process also updates the passing status. For webcast learning components the Auto Mark Class Completion process also retrieves scores. These scores can affect the passing status of the webcast learning component if the system requires learners to achieve a minimum score to pass the learning component. The Auto Mark Class Completion process overwrites any passing statuses and scores that instructors or administrators enter manually on the roster pages. If passing is not required, the process does not make any changes to the learner's passing status.

After every change made to a learner's attendance status, passing status, or score, the learning component completion engine runs to determine the learner's completion status for the learning component.

The following table shows how the Auto Mark Class Completion process sets attendance and passing statuses when any of the above conditions have been met:

Basic Learning Component Type	***Attendance Status Marked***	***Passing Status Marked***
Session	Attended	Pass

Basic Learning Component Type	***Attendance Status Marked***	***Passing Status Marked***
Webcast	Did not attend	Not marked
Web-Based, Test, or Survey (compliant or non compliant)	Did not attend	Not marked
Assignment	Attendance status is not tracked.	Passing status is not tracked.

Auto Mark Class Completion Page

Use the Auto Mark Class Completion page (LM_AUTOATTD_RUNCTL) to run the Auto Mark Class Completion process.

Navigation:

Enterprise Learning > **Auto Mark Class Completion** > **Auto Mark Class Completion**

Click **Run** to run this request. PeopleSoft Process Scheduler runs the Auto Mark Class Completion process at user-defined intervals.

Note: Run the Auto Mark Class Completion process daily during off-peak business hours.

See the product documentation for *PeopleTools: Applications User's Guide*.

Chapter 32

(FRA) Managing French Regulatory Requirements

Understanding Regulatory Requirements for France

Enterprise Learning Management helps you comply with French statutory requirements for employee training in the following areas:

- Training plan and budget preparation.
- Cost tracking and 2483 reporting.
- Hour tracking and DIF management.
- Education Assessment for External Learners

Training Plans and Budgets

With Enterprise Learning Management, you can produce reports that estimate the demand for learning and projected costs. You can use the reports to plan training budgets and to satisfy the Worker's Council requirements for training plans.

See Understanding Training Plans.

Cost Tracking and 2483 Reporting

The Training Report 2483 (TRN029), also called the Declaration 2483 report, is a French regulatory report that compiles information about the amount of money that a company has spent on employee vocational training. When you integrate Enterprise Learning Management with PeopleSoft HR 8.9 or above, you can use that application's Administer Training business process to generate this report. You collect most of the report data in Enterprise Learning Management and send it to HR, where the actual report is produced.

Hour Tracking and DIF Management

Hour tracking refers to tracking the number of hours that learners spend on training outside of their normal work schedule. DIF management refers to tracking the usage of the DIF training hours to which employees are entitled, based on their seniority, contract type, and working hours. With Enterprise Learning Management, you can track how many learners have participated in DIF training and export approved hours to the Administer Training business process for inclusion in the 2483 report. You can also export other training hours that were done outside the normal work schedule.

When HR is integrated with a payroll application, such as PeopleSoft Global Payroll for France, the payroll system can calculate DIF entitlement and balance information for each learner, taking into account the DIF hours recorded in Enterprise Learning Management, and return the results to Enterprise Learning Management (indirectly through HR). Enterprise Learning Management can then display DIF balances to learners and managers on the self-service pages and to administrators on the roster pages. Global Payroll for France can also calculate payments for training hours that are completed outside of the learner's regular schedule.

Educational Assessment for External Learners

For-profit training centers in France must fill out a legal document (CERFA No. 10443 * 09) to report training provided to external learners for the year. ELM provides data needed to fill out the Bilan Pédagogique, which is the educational assessment section of the CERFA document.

Understanding Integration with Enterprise Applications

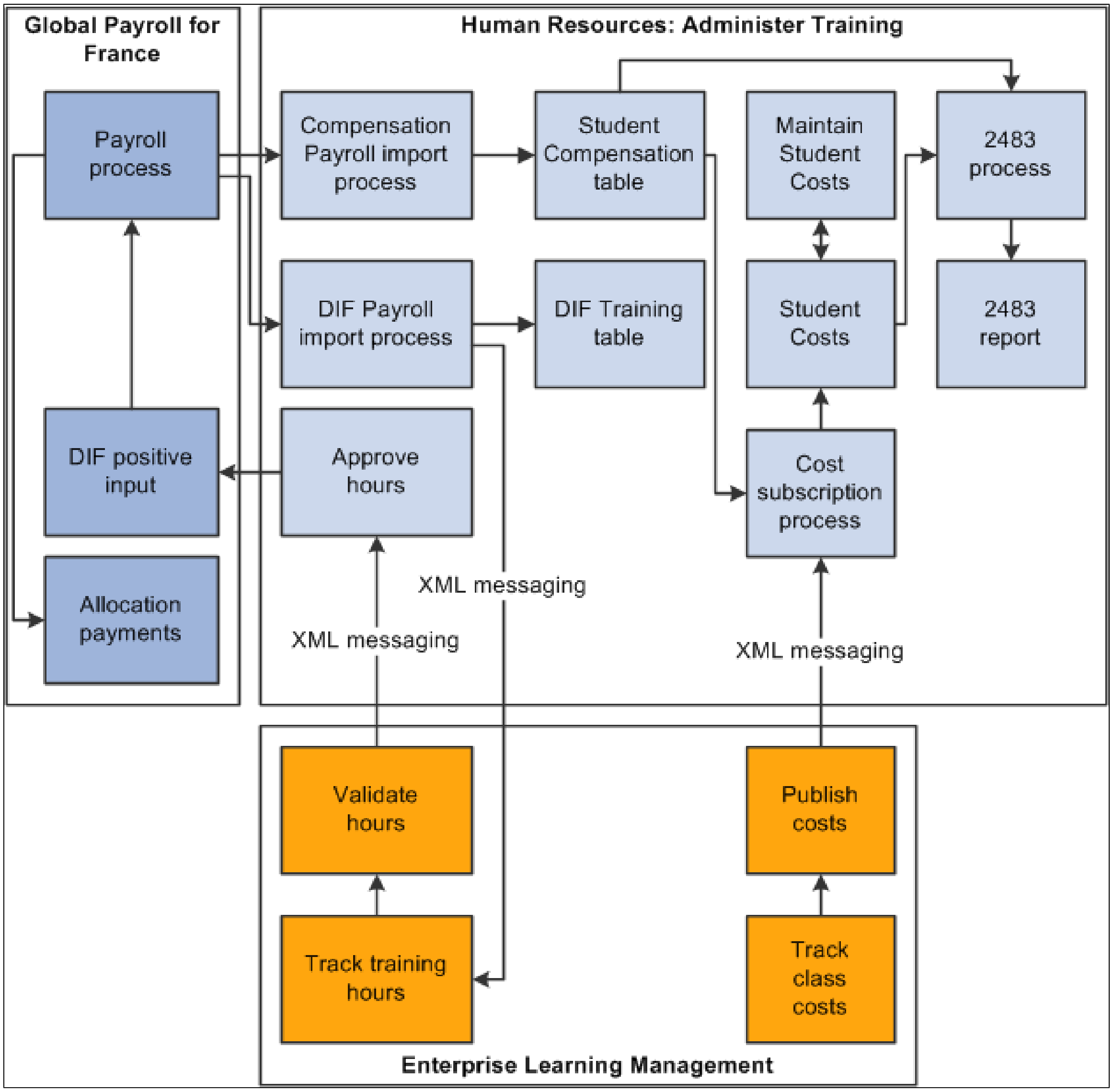
Enterprise Learning Management integrates directly with the Administer Training business process in HR 8.9 and above and indirectly with Global Payroll for France 8.9 and above, enabling you to produce the 2483 report, track DIF balances, and compensate learners for DIF training hours and training hours done outside the normal work schedule. The three applications interact as follows:

- Enterprise Learning Management is the application that you use to set up the learning catalog, instructors, vendors, and so on. You also use this application to track learning costs and to manage enrollment and other day-to-day tasks.
- The Administer Training business process in HR compiles information provided by Enterprise Learning Management and payroll and generates the 2483 report.
- Global Payroll for France computes learner and instructor salaries for the 2483 report and calculates learners' DIF entitlement balances.

  It also calculates the salary for training hours done outside of normally scheduled work hours.

Important! When you use Enterprise Learning Management to set up and track learning, do not use the Administer Training business process for those tasks. Use the Administer Training business process to configure and generate the 2483 report only. A permission list designed for Enterprise Learning Management users provides access to the Administer Training pages that are needed to set up and generate the 2483 report.

This diagram shows the relationships between Global Payroll for France, HR: Administer Training, and Enterprise Learning Management.



Enterprise Integration Points (EIPs)

Enterprise Learning Management uses EIPs to publish information to HR and to subscribe to information provided by that application. Following is a list of the full sync and incremental sync EIPs that are used to track learning costs and hours.

Note: The full sync messages can generate a high volume of data. Use these messages only if you need to resynchronize HR data and Enterprise Learning data during the integration process.

Message Name	***Message Subscription PeopleCode***	***Records Populated in Enterprise Learning Management***	***Explanation***
TRAINING_HOUR_SYNC (incremental sync) TRAINING_HOUR_ FULLSYNC (full sync)	Not applicable	Not applicable.	Outbound message that publishes validated training hours and DIF information to HR. The incremental sync message is triggered by the LM_STD _HOUR Application Engine process that is launched through the Export Learning Hours page. The full sync message is triggered from an option on the same page.
TRN_HOUR_ACK_SYNC (incremental sync) TRN_HOUR_ACK_ FULLSYNC (full sync)	DEFAULT	LM_STG_TRKHOUR (staging table) LM_ENR_LC_TBL	Incoming message from HR. The message retrieves an acknowledgement of action taken in HR and updates the Hour Tracking Status field on the Validate Training Hours page.
DIF_BALANCE_SYNC (incremental sync) DIF_BALANCE_ FULLSYNC (full sync)	DEFAULT	LM_STG_DIFHIST (staging table) LM_DIFHIST_TBL	Incoming message that subscribes to the DIF balance information computed by the payroll engine. DIF balances appear on the enrollment pages.
STUDENT_COST_ FULLSYNC (incremental sync) STUDENT_COST_SYNC (full sync)	Not applicable.	Not applicable.	Outbound message that publishes cost data to HR for inclusion in the 2483 report. Message is based on the LM_ ENRLMT_COST table. The incremental sync message is triggered by the LM_STD _COST Application Engine process that is launched through the Export Learning Cost page. The full sync message is triggered from an option on the same page.

Message Name	Message Subscription PeopleCode	Records Populated in Enterprise Learning Management	Explanation
COST_ACK_SYNC (incremental sync) COST_ACK_FULLSYNC (full sync)	DEFAULT	LM_STG_TRKCOST (staging table) LM_ENR_LC_TBL	Incoming message that subscribes to the cost acknowledgement sent by HR. This message includes a status field that informs the administrator about the action done by the HR administrator.

EIPs and Staging Tables

Data that is imported through incremental sync EIP messages (DIF balances, and acknowledgements for the receipt of learning costs and hours) goes into intermediary staging tables. You must run a validation process to ensure that there are no data errors before loading the data into the system. You can run this process, as needed, and also schedule it to run on a regular basis using the Process Asynchronous Data page.

It's recommended that you do not select the option to *Automatically delete completed process.* Administrators can then periodically review the staging table for data that could not be loaded due to errors and purge the staging tables by manually launching the delete process. For example, if you schedule the asynchronous process to run daily, the administrator may want to check the staging table for errors every few days. If no errors exist, the administrator can launch the process with the delete option selected.

Related Links

Processing Staged Data

(FRA) Prerequisites for French Features

Before you can configure the system to manage learning costs and hours, you must:

- Activate French features.

  Some pages contain fields for tracking DIF hours and other French-specific data. You can control the display of these fields for a given learning environment using the Enable French Features check box on the Learning Environment - Defaults page.

- Ensure that the French permission list is assigned to the appropriate users.

  Access to administrator pages and components that are designed for France is controlled by permission list. Users must be associated with permission list LMLELM6600 or role LMLELM_FRENCH_ENH to access the following pages:

  - Learning Classifications

- Training Plan Categories
- Financing Organization
- Cost Export Options
- Export Learning Costs
- Hour Types
- Training Hour Validation
- Publish Learner Training Hour

Managing Learning Costs and 2483 Reporting

Pages Used to Manage Learning Costs

Page Name	***Definition Name***	***Usage***
Organization Profile Page	LM_FIN_ORG_MAIN	Define a financing organization's name and learning environment.
Organization Address Page	LM_FIN_ORG_ADDR	Define a financing organization's address.
Cost Export Options Page	LM_STD_COST_UPD	Associate class types with class enrollment statuses. The combination of these values determines when learner costs for classes can be exported to HR.
Export Learning Cost Page	LM_RUNCTL_LEFR001	Publish learner cost data to HR.

Understanding Cost Management

Enterprise Learning Management enables you to track costs for classes and send cost data to the Administer Training business process in HR for inclusion in the 2483 report. Class costs include the cost of equipment, facilities, instructors, materials, and vendor products. The system automatically calculates a class's costs based on the unit costs defined on the setup pages for the class's resources. You can enter additional class expenses and create offsetting entries to adjust the system-calculated amounts, as needed. You can also specify which of a class's costs are chargeable for 2483 reporting purposes, and identify the financing organization for costs that are fully or partially financed.

a class's type and a learner's enrollment status determine when costs can be sent to HR. For each class type—blended, scheduled, or self-paced—you define when costs are eligible for export, using the Cost Export Options page. As an example, for scheduled classes, you can specify that learners' costs are eligible for export when learners complete classes.

When you run the Publish Learner Cost (LM_STD_COST) process, the system selects all classes that are associated with the learning environment specified on the run control page and that start and end within the defined period. Next, the system identifies the subset of enrollment records that meet the eligibility rules defined on the Cost Export Options page. For each class, it calculates the costs per learner, based on the number of considered learners and training duration, and sends a message with the cost information to HR.

After you export cost data for the 2483 reporting period, an administrator with the appropriate permissions for the Administer Training business process can use that business process to enter the additional information that is needed to produce the 2483 report and run the report. Permission lists control access to the subset of Administer Training pages that are used to prepare and produce the report.

Modifying Costs

If you run the export process for the same set of classes more than once, and the number of learners has changed since the last transmission, the system sends all costs again, splitting them across the learners who currently meet the enrollment status criteria (defined on the Cost Export Options page). If you modify a cost after exporting it and the number of learners is unchanged, the next time you run the export process for that class, the system sends only the modified cost, split across the same set of learners.

Setup Tasks for Managing Learning Costs

To configure the system to manage learning costs:

See Learning Classifications Page.

1. Define cost export rules.

   a class's type (blended, scheduled, or self-paced) and the learner's enrollment status determine when class costs can be exported to HR. For each class type, you must specify when cost data is eligible for export. Use the Cost Export Options page to define the export rules.

   See Cost Export Options Page.

2. Define financing organizations.

   For a given class, an administrator can identify the financing organizations that fund various training costs. Use the Financing Organizations component to define financing organizations.

   See (FRA) Defining Financing Organizations.

3. Activate the EIPs that are used to publish cost data to HR (STUDENT_COST_SYNC and STUDENT_COST_FULLSYNC).

4. Enable the receipt of cost acknowledgement messages (COST_ACK_SYNC EIP) from HR.

   The Administer Training business process in HR can send a message to Enterprise Learning Management acknowledging receipt of cost data. Messages are sent to a staging table in Enterprise Learning Management and must be validated before they can be loaded. Use the Process Asynchronous Data (LM_LD_ASYNC) to schedule the validation and load process to run at regular intervals.

   See Processing Staged Data.

Ongoing Tasks for Managing Learning Costs

To manage learning costs on a day-to-day basis:

- When defining class costs, specify which costs are chargeable for 2483 reporting purposes, and identify the amounts funded by a financing organization. For facility and vendor costs, you can specify only one chargeable cost; only the chargeable cost is exported. For all other cost types, the system exports chargeable and non-chargeable costs.

  Review and update class costs on the Class Costs page. You can also add instructor expenses, for lodging, transportation, meals and other items on that page.

- Export costs to HR.

  Use the Export Learning Costs component to export cost data.

  See Export Learning Cost Page.

Note: The 2483 report includes statistical information that is collected when you use the hour tracking features of Enterprise Learning Management. Follow the procedures for Managing Learning Hours and DIF to ensure that this data is available for the report.

Cost Management for Self-Paced Classes

When generating a 2483 report in HR, the user identifies the declaring year for the report. The declaring year determines which costs to include, based on the class begin and end dates.

For self-paced classes that have no end date, the system cannot determine the declaring year. Therefore, it is recommended that you set the end date for each self-paced class to December 31. You can then clone the class for each year it is offered so that each class is dedicated to a specific year and a single 2483 report. This not only ensures that costs for self-paced training are included in the appropriate 2483 report, it also prevents the modification of costs that were included in a previous year's report.

Defining Financing Organizations

For instructions for defining financing organizations, see .(FRA) Defining Financing Organizations.

Cost Export Options Page

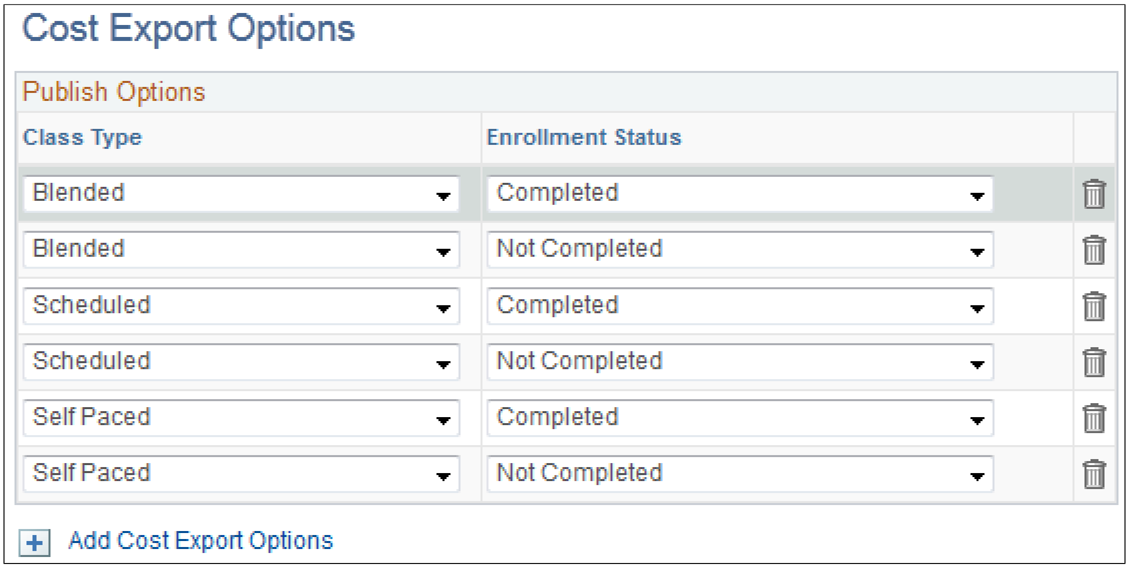
Use the Cost Export Options page (LM_STD_COST_UPD) to associate class types with class enrollment statuses.

The combination of these values determines when learner costs for classes can be exported to HR.

Navigation:

Set Up ELM > **Planning** > **Cost Export Options** > **Cost Export Options**

This example illustrates the fields and controls on the Cost Export Options page.



When you run the process to publish learner costs, the system refers to the settings you define here to determine which enrollment records to consider.

Field or Control	***Description***
Class Type	Select a class type. *Blended*: a class that contains both scheduled and self-paced learning component types. *Scheduled*: a class that contains only scheduled learning component types. *Self Paced*: a class that contains only self-paced learning component types. See Understanding Learning Components.
Enrollment Status	Select an enrollment status: *Completed, Declined, Delete from Plan, Dropped, Enrolled, In Progress, Learning Request, Moved to New Class, Not Completed, Pending Approval, Pending Payment, Planned, Waitlisted,* or *Waived.* You can specify as many enrollment statuses as you need for each class type. Consider which combinations will work best for your business needs. See Enrollment and Registration Statuses.

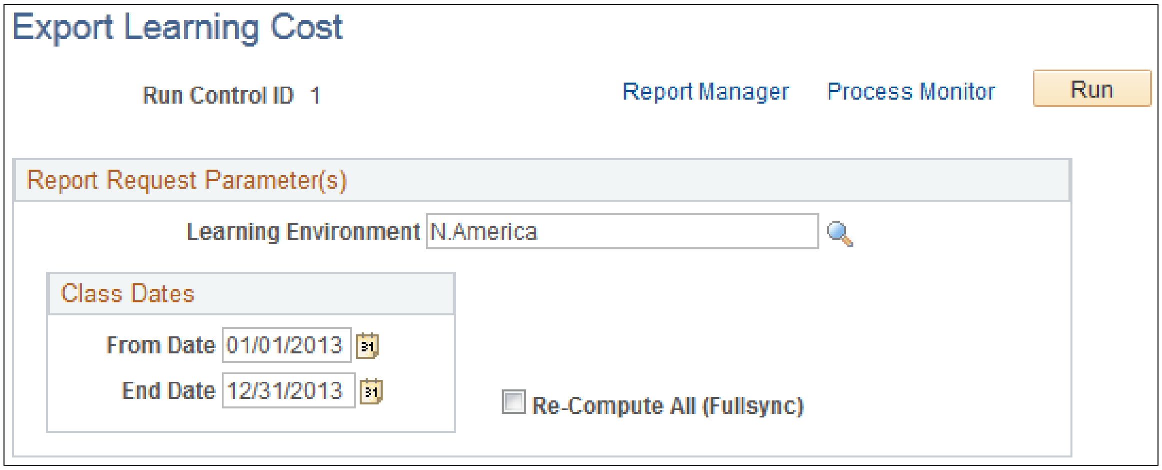
Export Learning Cost Page

Use the Export Learning Cost page (LM_RUNCTL_LEFR001) to publish learner cost data to HR.

Navigation:

Set Up ELM > **Planning** > **Export Learning Cost** > **Export Learning Cost**

This example illustrates the fields and controls on the Export Learning Cost page.



Use this page to identify the set of classes for which you want to publish learner costs and to launch the Publish Learner Cost process.

During this process, the system retrieves each class that meets the run control parameters and splits the class costs across the learners that meet the enrollment status criteria defined on the Student Cost Publish Options page. Cost splitting is based on the number of learners and the training duration for each learner according to the Learner Roster. It also triggers the incremental STUDENT_COST_SYNC EIP message that publishes cost data to HR.

It is recommended that you schedule this process to run at a regular interval; a minimum of once a year is necessary to export costs for preparation of the 2483 report.

Field or Control	***Description***
Learning Environment ID	Select the learning environment for which you want to publish learner costs. The system will locate all classes within the learning environment that fall within the dates you enter in the date fields.
From Date and End Date	To publish costs for classes that started and ended within a given date range, enter the dates here. For example, to publish costs for classes that started and ended in 2006, enter a From Date of January 1, 2006 and an End Date of December 31, 2006. If no dates are specified, the process considers the costs for all classes, provided the costs have never been published or have been modified through a change to the Class Cost page since they were last published.

Field or Control	*Description*
Re-compute All (Fullsync)	Select to publish all costs that meet the selection parameters again, not just those that have been modified or that have never been published. **Note:** When you select this option, the system uses the full sync EIP message to publish costs to HR. This EIP can generate a high volume of data and should be used only if you need to resynchronize HR and Enterprise Learning Management data.

Managing Learning Hours and DIF

Pages Used to Manage Learning Hours

Page Name	*Definition Name*	*Usage*
Learning Classifications	LM_TRAINING_CLASS	Review delivered learning classifications.
Training Plan Categories	LM_TRG_PLN_CTG	Review delivered training plan categories.
Hour Types	LM_HOUR_TYPE	Review and define hour types.
Validate Training Hours	LM_TRK_HRS_SRCH	Validate training hours and review the status of hours sent to the Administer Training business process.
Export Learning Hours	LM_RUNCTL_LEFR002	Publish learning hours to the Administer Training business process.
DIF Balance Report	LM_RUNCTL_DIF	Report DIF balances.

Understanding Management of Learning Hours and DIF

Hour tracking in Enterprise Learning Management provides these benefits: it captures statistical data that is required for the 2483 report, and it enables you to track and send DIF training hours and training hours that occur outside a learner's regular work schedule to a payroll application, such as Global Payroll for France, through the Administer Training business process in HR. The payroll application can calculate each learner's new DIF balance and return this information to Enterprise Learning Management for display during the enrollment process and on self service pages. It can also calculate the training allocation payment for training done outside the regular work hours.

For each of a class's components, you can track the number of DIF and non-DIF training hours that occurred during a learner's normal work schedule and outside the work schedule. Hour types are used to track this information. Four hour types are delivered as system data: Regular Training Hours - in working schedule; Regular Training Hours - out of working schedule; DIF Training Hours - in working schedule; and DIF Training Hours - out of working schedule.

When an administrator defines a class, he or she enters a duration, in hours, for each of the class's learning components. The administrator also indicates which classes are eligible for DIF and selects an approval definition, if applicable. After learners complete the class, the administrator can use an online roster page, if needed, to record the amount of time the learner spent on each component, by hour type.

For example, assume that a DIF-eligible class has one session component with a duration of five hours. The learner spends one hour during the normal work schedule at the training session and four hours outside the work schedule. After the learner completes the training, the administrator uses the roster to associate hours types with the learner's hours as follows:

Hour Type	***Number of Hours***
DIF Training Hours - in working schedule	1
DIF Training Hours - out of working schedule	4

Learning administrators can validate training hours and transfer this data to HR, so that an HR administrator can approve and send the hours to payroll. Hours approved by the HR administrator are converted to positive input that can be processed during the next pay run. When you use Global Payroll for France, the payroll system can use the hours recorded in Enterprise Learning Management to update learners' DIF balances.

Hours are exported by component. If a class has more than one component, the system exports whatever hours have not been sent before. For example, suppose that a class with several learning components lasts for several months. As soon as the hours for one component are approved, they can be sent to HR (and then the Payroll application) so that the training allocation can be paid and DIF balances can be updated without waiting for the end of the class.

Catalog Setup Considerations

You can make DIF-eligible classes easy to find in the learning catalog and easier to manage if you adhere to the following guidelines when building the catalog:

- Create a separate category or categories for DIF-eligible learning.
- Include the DIF label in category names, when appropriate.
- Include the DIF label in course names, when appropriate.

If you follow these guidelines, users will be able to find learning that qualifies for DIF usage by searching for categories and courses with DIF in the name.

Approval of DIF Training Requests

Enterprise Learning Management handles enrollments that require approval for DIF the same as it does enrollments that require approval for other reasons. That is, the administrator selects the approval process on the Class Details page and uses the approval pages or roster to grant approval.

Employees can specify that they want to use DIF hours while completing a learning request, supplemental learning, or when enrolling in a class. When the enrollment request is entered, workflow triggers an email to inform the approvers of the request using the approval framework. An administrator or the manager can approve the request and, once approved or rejected, an email is triggered to inform the learner. If approved, the class is identified with a DIF indicator on the roster. This indicator is selected automatically if the request is from the learner. If not selected, the administrator has the ability to check it. When requesting the use of DIF hours, the system assumes that all hours for that training are to be applied against the learner's DIF balance.

Setup Tasks for Managing Training Hours

To configure the system to track learning costs:

1. Review the delivered learning classifications and training plan categories and modify if necessary.

   Under French law, training must be categorized according to a specific set of learning classifications, such as competency check, CIF (Congé Individuel de Formation) and experience validation. These classifications appear on training reports, and can affect a learner's compensation for training time. Enterprise Learning Management delivers the valid classifications that are required by French law. You can modify the classification descriptions, but you should not modify their numerical identifiers. Changing the numeric codes can compromise the integrity of the data used in the 2483 report.

   French law also requires that training plan categories be assigned to enrollments when producing training plans. Enterprise Learning Management delivers the valid Training Plan Categories required by French law. As with learning classifications, you can modify the classification descriptions, but you should not modify the numerical identifiers as changes can compromise the integrity of the data used in the 2483 report.

   See Learning Classifications Page.

   See Training Plan Categories Page.

2. Review the delivered hour types and modify if necessary.

   Administrators use hour types to designate for a learner, when training occurred—that is, how many hours occurred during or outside of the learner's regular work schedule—and whether any of the hours were related to DIF. Enterprise Learning Management delivers four hour types. You can modify the descriptions of the delivered hour types but should not update their numerical identifiers.

   See Hour Types Page.

3. (Optional) Import DIF balances from HR.

   If Administer Training is integrated with Global Payroll for France, you can import DIF balances that the payroll application has calculated for learners. First, run the full sync EIP: LM_DIF_BALANCE_FULLSYNC to load the balances into a staging table, then run the Process FullSync Data (LM_LD_STGDAT) process to validate and load data into Enterprise Learning Management.

See Processing Staged Data.

4. Enable the ongoing receipt of DIF balances and hour acknowledgement messages from HR.

   Activate the DIF_BALANCE_SYNC and the TRN_HOUR_ACK incremental EIP messages. Ensure that the Process Asynchronous Data (LM_LD_ASYNC) process is scheduled to run at regular intervals.

   The first EIP imports updated DIF balances from HR. The second EIP enables Enterprise Learning Management to display current hour tracking statuses. Each time the hour tracking status changes, it can send Enterprise Learning Management an update.

5. When creating the learning catalog, complete the following tasks:

   - (Optional) Create a separate category for DIF-eligible learning.
   - When defining courses for which DIF hours can be used, select the DIF-eligible check box on the Item - Item Details page.
   - (Optional) Assign a default learning classification to each course.

     Class enrollment records inherit the learning classification from the course. If there is no default value, the administrator can specify the classification through the roster pages.
   - For each class, enter the duration of the constituent learning components.

     The values that you enter become the default values for the component hours on the roster pages.

Ongoing Tasks for Managing Learning Hours and DIF

To manage learning hours and DIF tracking on a day-to-day basis:

- Approve requests to use DIF hours as you would other requests that require approval.

  You can use the roster pages or an approvals page to approve enrollments where the use of DIF hours is requested.
- As learners complete classes, use the roster pages to update, by component, the number of training hours that were DIF-eligible or non-DIF eligible and how many hours occurred outside the learner's regular work schedule.

  By default, the system assumes that learners spent the number of hours specified on the component's Recommended Duration page. For classes not eligible for DIF, it further assumes that all of those hours occurred during the learner's normal work schedule. For DIF-eligible classes, the system assumes all of those hours occurred outside of the learner's normal work schedule. If you need to update this information, use the Hours tab of the Learner Roster page.
- Validate hours.

  Use the Validate Training Hours page or the class roster to validate hours before they are exported to Administer Training. Use the Learner Roster to validate hours for individual learners; the Validate Training Hours page is more efficient for mass validations.
- Export hours to HR.

Use the Export Learning Hours page to publish validated hours.

- Monitor exported hours and follow up on rejected hours.

  After exporting hours, review the Validate Training Hours page for rejected records.

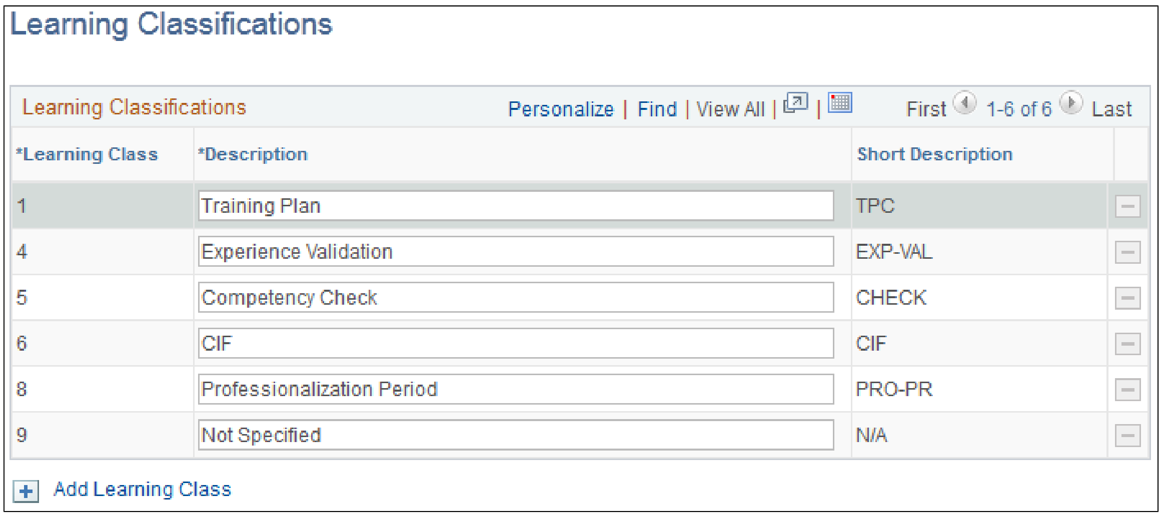
Learning Classifications Page

Use the Learning Classifications page (LM_TRAINING_CLASS) to review delivered learning classifications.

Navigation:

Set Up ELM > Resources > Learning Classifications

This example illustrates the fields and controls on the Learning Classifications page.



Learning Classifications

Learning Classifications — Personalize | Find | View All | First 1-6 of 6 Last

*Learning Class	*Description	Short Description
1	Training Plan	TPC
4	Experience Validation	EXP-VAL
5	Competency Check	CHECK
6	CIF	CIF
8	Professionalization Period	PRO-PR
9	Not Specified	N/A

Add Learning Class

Some of the classifications can be used within the 2483 report.

Warning! Six learning classifications are delivered as system data with Enterprise Learning Management. You can modify their descriptions, but the corresponding numerical codes are not editable.

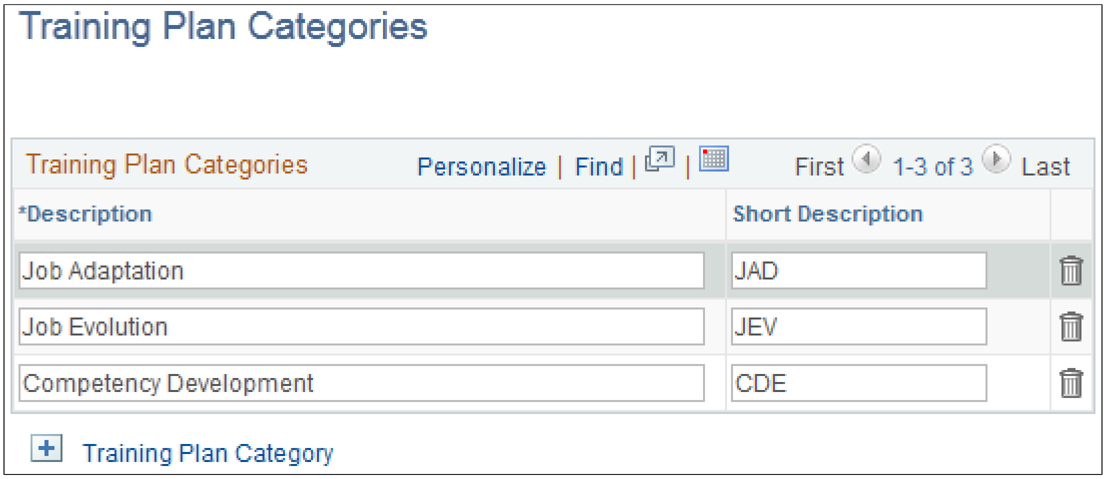
Training Plan Categories Page

Use the Training Plan Categories page (LM_TRG_PLN_CTG) to review delivered training plan categories.

Navigation:

Set Up ELM > Resources > Training Plan Categories > Training Plan Categories

This example illustrates the fields and controls on the Training Plan Categories page.



Warning! Three learning classifications are delivered as system data with Enterprise Learning Management. You can modify the descriptions, but should not change the corresponding numerical codes. Modifying the codes can compromise the integrity of the statistical data that is reported in training plans and the 2483 report.

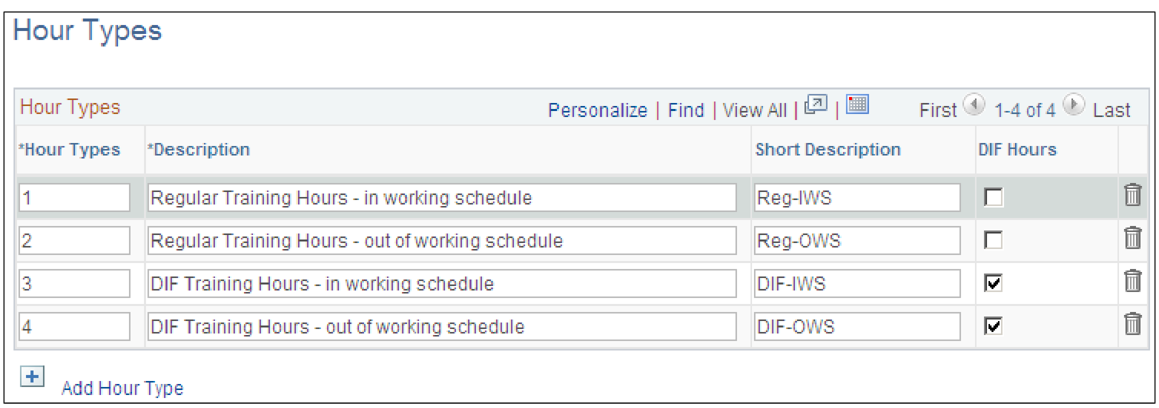
Hour Types Page

Use the Hour Types page (LM_HOUR_TYPE) to review and define hour types.

Navigation:

Set Up ELM > **Resources** > **Hour Types**

This example illustrates the fields and controls on the Hour Types page.



Warning! Four hour types are delivered as system data with Enterprise Learning Management. You can modify the descriptions, but should not change the numerical classification codes. Modifying the codes can compromise the integrity of data that is reported in training plans and the 2483 report.
You can add hour types, however no system logic is tied to new hour types and they will not be exported to HR.

Field or Control	*Description*
Short Description	This value appears as a column label on the Hours tab of the Training Hour Validation component.
DIF Hours	Indicates whether an hour type contributes to planned DIF hours. Planned DIF hours are displayed in the **DIF Balance** group box that appears on the My Learning (LM_LEARNING_HM), Team Learning (LM_MGR_GRP_CURNT), and Component Duration (LM_LRNR_ROSDUR_SEC) pages.

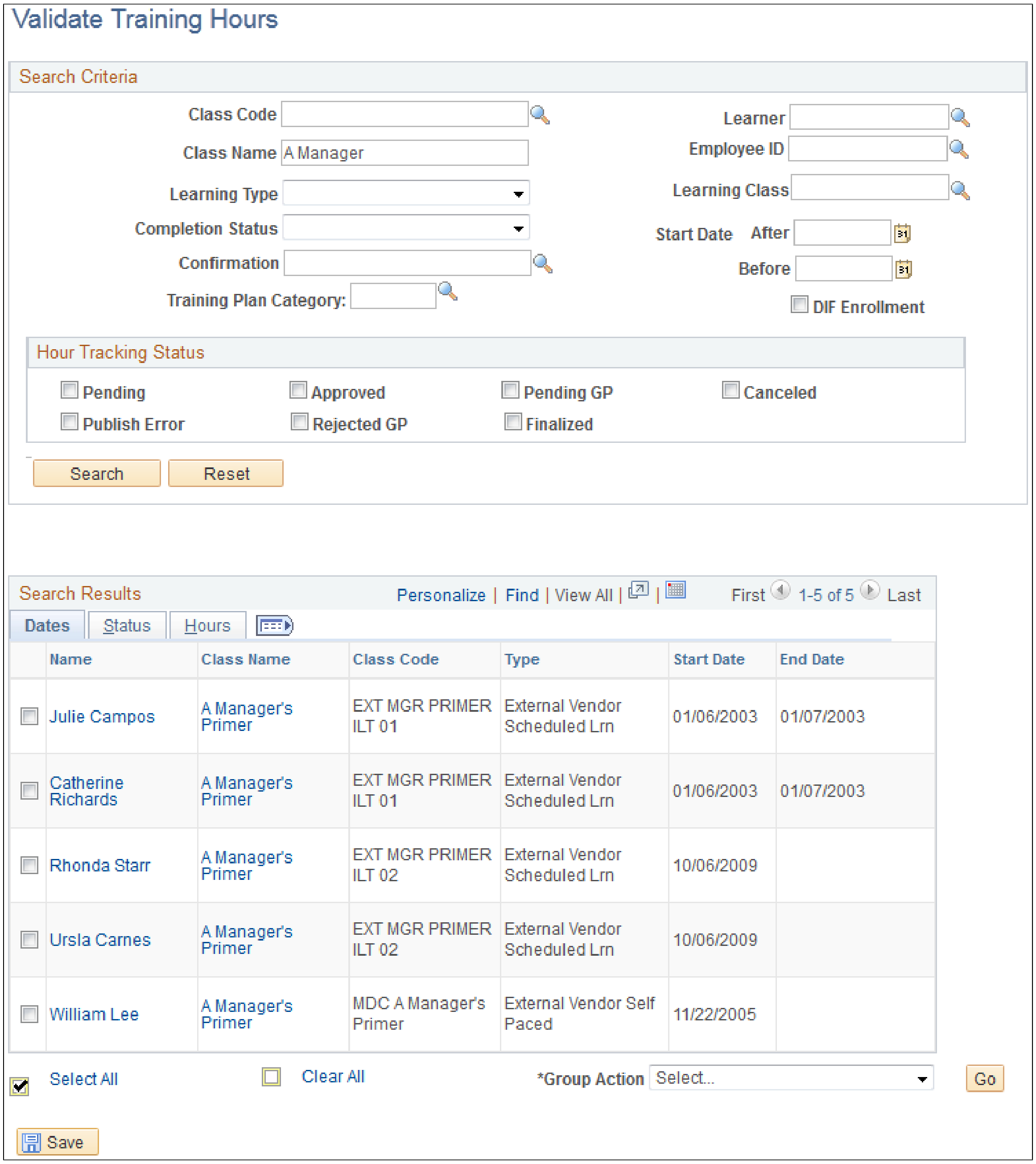
Validate Training Hours Page

Use the Validate Training Hours page (LM_TRK_HRS_SRCH) to validate training hours and review the status of hours sent to the Administer Training business process.

Navigation:

Enterprise Learning > **Learner Tasks** > **Validate Training Hours** > **Validate Training Hours**

This example illustrates the fields and controls on the Validate Training Hours page.



Administrators can validate hours for classes within their own learning environment.

To review and validate training hours:

1. Enter the search criteria to locate the enrollment records you want to review.

   In the search results, the Hours tab shows the validation status (for example, whether the hours are pending review or have already been sent to HR) and a breakout of the learner's hours by hour type. Administrators specify the number of hours by hour type on the Component Duration page (LM_LRNR_ROSDUR_SEC) of the class roster.

2. Update a learner's hour tracking status or use the Group Action feature to change the status of multiple learners simultaneously.

When using the Group Action feature, you can change the status to Approved by ELM Administrator, Canceled, or Pending Review from ELM Administrator.

Search Criteria

Use the following fields to search for the training you want to validate.

Field or Control	***Description***
Class Code	Enter a class code.
Class Name	Enter a class name. **Note:** This field is case sensitive.
Learner	Enter a learner's name.
Employee ID	Enter an employee's unique ID.
Type	Select a delivery method.
Completion Status	Select a completion status.
DIF Enrollment	Select to retrieve records for DIF enrollments only.
Learning Class (learning classification)	To search for enrollment records associated with a particular learning classification, select the classification here.
Training Plan Category	To search for enrollment records associated with a particular training plan category, select the classification here.
Start Date	To search for enrollment records for classes that began within a certain date range, enter the class start dates here. The process goes through all components of a class. A status is managed at the learning component level so a component is not sent twice to HR. So even though a user cannot select a component to publish, the process knows which components to publish, based on the status field.

Hour Tracking Status

Select the tracking status of enrollment records you want to review. For example, select Pending to see the records that require validation; select Approved to see the records that have been validated and are ready for export.

Dates Tab

This tab displays the class name, code, type, start date, and end date.

Status Tab

The Status tab shows the learning classification, training plan category, the completion status, and a DIF check box that is selected if hours for the class are to be applied to DIF. Learners can request the use of DIF hours on the self-service page during enrollment; administrators can indicate that DIF hours are to be used on the Learner Roster page that is accessible through the class roster.

Hours Tab

Use this tab to review the current hour tracking status and to validate hours so that they can be exported to HR.

Field or Control	***Description***
Hour Tracking Status	The current status determines the available options: *Pending Review from ELM:* This is the default value. *Approved by ELM Administrator:* Select to signify that you have validated the hours and they are ready for export. *Pending Review from Payroll:* Training hours have been sent to HR. You cannot change this value. *Canceled:* Select to prevent the hours from being published to HR. *Publish Error:* Integration Broker was unable to transmit the training hours to HR. Check Message Monitor for more information, fix the problem and set the status back to Approved. See *PeopleSoft Integration Broker* *Rejected by Payroll Admin:* The hours were rejected by the payroll administrator. (For example, the learner exceeded his or her DIF balance.) You can update the training information and set the status to Approved by ELM Administrator again or set the status to Canceled. *Finalized:* The HR administrator has approved the hours in the HR application and positive input has been created for payroll.

Field or Control	***Description***
Reg-IWS, Reg-OWS, DIF-IWS, and DIF-OWS	The column headings are derived from the Hour Type page. The system displays the short descriptions for the four hour types that are delivered as system data: • Reg - IWS: Regular training hours in working schedule. • Reg - OWS: Regular training hours out of working schedule. • DIF - IWS: DIF training hours in working schedule. • DIF - OWS: DIF training hours out of working schedule.

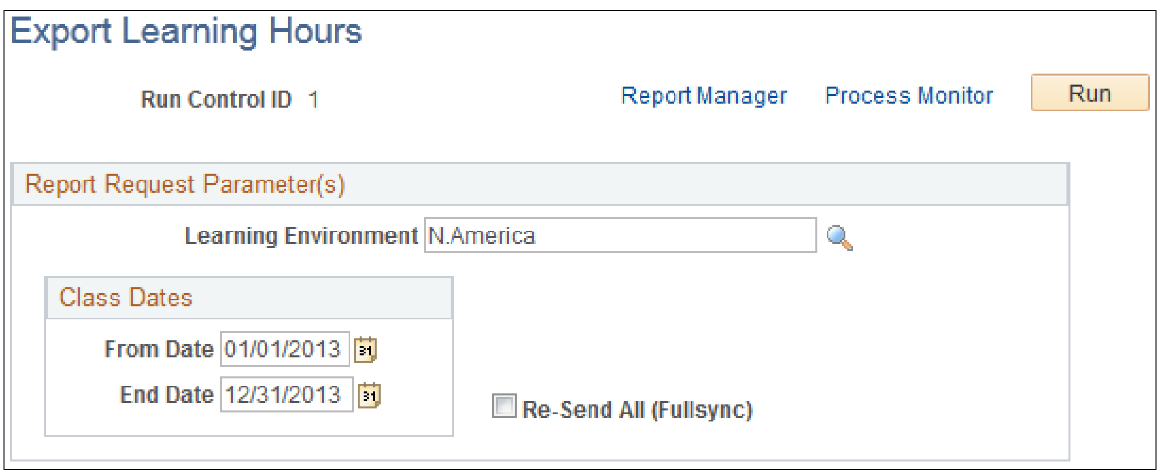
Export Learning Hours Page

Use the Export Learning Hours page (LM_RUNCTL_LEFR002) to publish learning hours to the Administer Training business process.

Navigation:

Set Up ELM > **Planning** > **Export Learning Hours** > **Export Learning Hours**

This example illustrates the fields and controls on the Export Learning Hours page.



The LM_STD_HOUR Application Engine process uses an asynchronous XML message (TRAINING_HOUR) to publish validated training hours to HR. You can set up the process to run at regular intervals, such as daily or weekly. You can also run the process on an as-needed basis.

For affected learners, the message publishes information about the class, learning component, session start and end date, session duration, and the number of hours associated with each hour type. When you run the process, only those hours that have an hour tracking status of Approved by ELM Administrator are published. As soon as the hours are published, their status changes to Pending Review from Payroll. You cannot modify or resubmit these hours unless the payroll administrator rejects the hours, which sets the status to Rejected by Payroll Admin.

Upon receipt of the message, a HR administrator validates the training hours and sends the approved information to Global Payroll for processing.

After you publish training hours, use the Validate Training Hours page to search for enrollment records with a status of Rejected by GP or Publish Error.

Field or Control	***Description***
Learning Environment	Select the learning environment of the classes for which you want to publish hours.
From Date and End Date	To publish hours for only those classes that started and ended within a given date range, enter the dates here. The system will publish the hours for the components of those classes that started on or after the specified From Date and that ended on or before the End Date. If no dates are entered, the process sends hours for all classes that are associated with the selected learning environment and that have a status of Approved by ELM Administrator.
Re-Send All (Fullsync)	Select to publish all hours that meet the selection parameters again, not just those that have never been published. **Note:** When you select this option, the system uses the full sync EIP message to publish hours to HR. This EIP can generate a high volume of data and should be used only if you need to resynchronize HR and Enterprise Learning Management data.

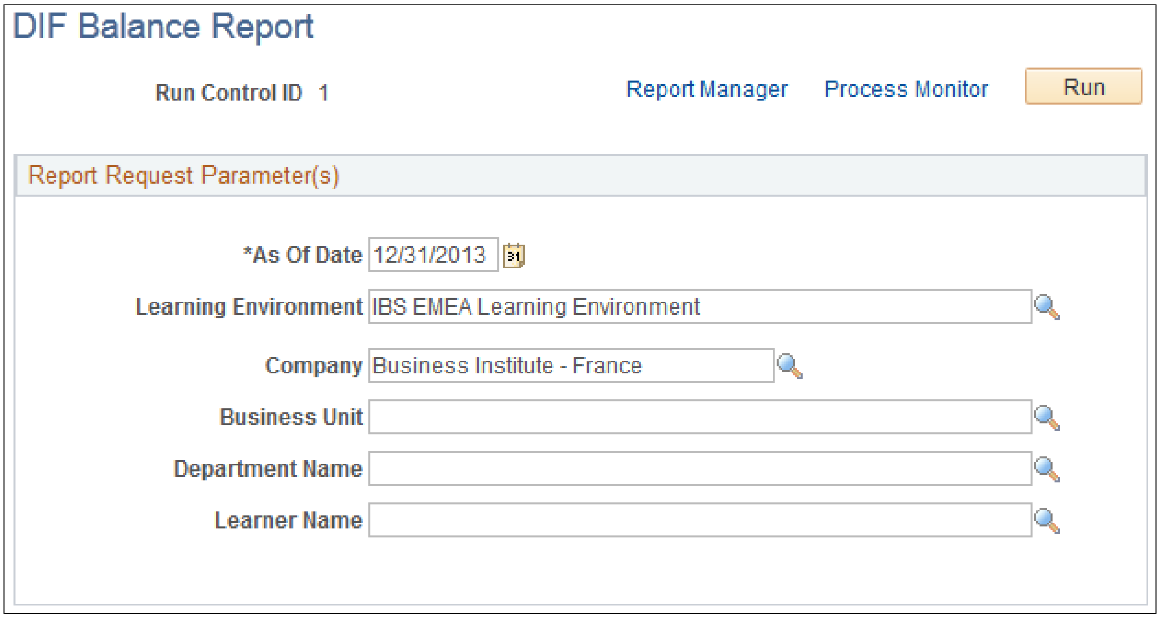
DIF Balance Report Page

Use the DIF Balance Report page (LM_RUNCTL_DIF) to report DIF balances.

Navigation:

Enterprise Learning > **Learner Reports** > **DIF Balance Report** > **DIF Balance Report**

This example illustrates the fields and controls on the DIF Balance Report page.



Use this page to generate a report listing DIF balances for a configurable subset of employees.

Field or Control	***Description***
As Of Date	The report lists DIF balances as of the date you enter in this field.
Learning Environment	Enter a value to filter the employees included in the report by learning environment.
Company	Enter a value to filter the employees included in the report by company.
Business Unit	Enter a value to filter the employees included in the report by business unit.
Department Name	Enter a value to filter the employees included in the report by department.
Learner Name	Enter a value to generate a DIF balance report for a specific employee.

Managing DIF Requests

Pages Used to Manage DIF Requests

Page Name	*Definition Name*	*Usage*
Maintain Pending DIF Requests	LM_ADM_PND_DIF_REQ	Maintain pending DIF requests.
DIF Request Notifications	LM_RCTL_DIF_NOTIF	Send DIF request reminder notifications.

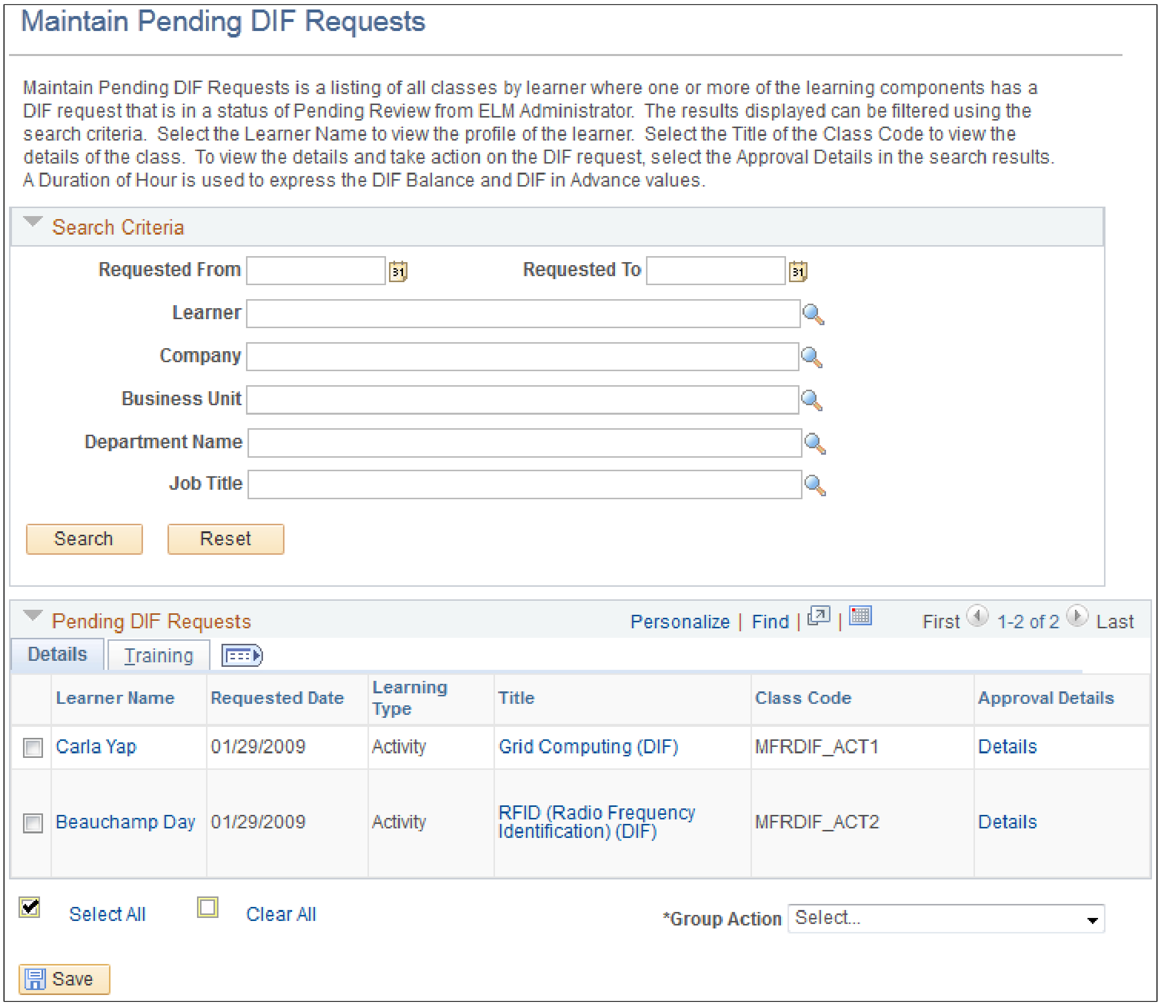
Maintain Pending DIF Requests Page

Use the Maintain Pending DIF Requests page (LM_ADM_PND_DIF_REQ) to maintain pending DIF requests.

Navigation:

Enterprise Learning > **Learner Tasks** > **Maintain Pending DIF Requests** > **Maintain Pending DIF Requests**

This example illustrates the fields and controls on the Maintain Pending DIF Requests page.



Search Criteria

Use this group box to search for pending DIF requests meeting specific criteria.

Field or Control	***Description***
Requested From and Requested To	Enter a date range. The system searches for pending DIF requests with a requested date falling within the specified date range.
Learner	Enter the specific learner for whom you want to search for pending DIF requests.
Company	Enter the company for which you want to search for pending DIF requests.

Field or Control	*Description*
Business Unit	Enter the business unit for which you want to search for pending DIF requests.
Department Name	Enter the department for which you want to search for pending DIF requests.
Job Title	Enter the job title for which you want to search for pending DIF requests.
Search	Click to search for DIF requests that meet the criteria you specified.
Reset	Click to clear the values in the search criteria fields and clear the results in the Pending DIF Requests group box.

Pending DIF Requests: Details Tab

This tab displays the learning details for the classes and learning requests that meet your search criteria.

Field or Control	*Description*
Learner Name	Click to access the Learner Information page for the learner.
Title	Click to access the Class Details page for the class.
Approval Details	Click the Details link access the Learner Roster page for a requested class.

Pending DIF Requests: Training Tab

This tab displays the training information for the learning requests and classes that meet your search criteria. For each learning request or class, it displays the learning classification, training plan category, DIF hours, DIF balance, DIF in advance, and planned DIF balance. In addition, the Warning column indicates whether a DIF request is approaching the 30-day limit.

Pending DIF Requests for Supplemental Learning: Details Tab

This tab displays the learning details for the supplemental learning that meet your search criteria.

Field or Control	*Description*
Approval Details	Click the Details link to access the Supplemental Learning page for the requested supplemental learning.

Pending DIF Requests for Supplemental Learning: Training Tab

This tab displays the training information for the supplemental learning that meets your search criteria. For each supplemental learning, it displays the learning classification, training plan category, DIF hours, DIF balance, DIF in advance, and planned DIF balance. In addition, the Warning column indicates whether a DIF request is approaching the 30-day limit.

Group Action

Using this field, you can update the status of multiple DIF requests at once. Select the check box next to the DIF requests you want to update and select the status you want to apply to them in the **Group Action** field. Values are: *Pending Review from ELM Admin, Approved by ELM Administrator,* and *Cancelled.*

Related Links

Learner Roster Page

DIF Request Notifications Page

Use the DIF Request Notifications page (LM_RCTL_DIF_NOTIF) to send DIF request reminder notifications.

Navigation:

Enterprise Learning > **Notifications** > **DIF Request Notifications** > **DIF Request Notifications**

Use this page to run the Send DIF Request Reminders (LM_DIF_RMNDR) process, which notifies DIF request approvers that they have DIF requests to address that have been pending for a number of days greater than the number specified for the learning environment.

Related Links

Learning Environment - Defaults Page

Managing Educational Assessment Reporting

Pages Used to Manage Educational Assessment Reporting

Page Name	*Definition Name*	*Usage*
Specialist Training	LM_ACT_SPL_TRG	Define specialist training values.

Page Name	Definition Name	Usage
Educational Assessment	LM_RUNCTL_EDU_ASMT	Generate the Educational Assessment report.

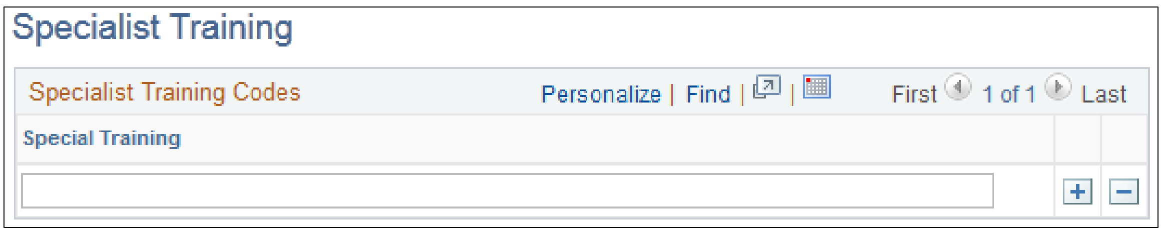
Specialist Training Page

Use the Specialist Training page (LM_ACT_SPL_TRG) to define specialist training values.

Navigation:

Set Up ELM > **Resources** > **Specialist Training**

This example illustrates the fields and controls on the Specialist Training page.



Use this page to define a set of specialist training values. These values are not defined by French regulatory requirements and are often unique for each customer, so ELM does not deliver values for this page. You can select the values defined on this page in the Specialist Training field on the Maintain Classes - Class Details page.

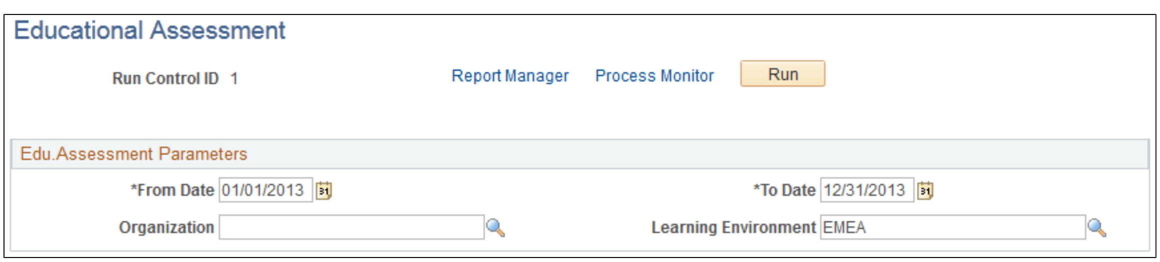
Educational Assessment Page

Use the Educational Assessment page (LM_RUNCTL_EDU_ASMT) to generate the Educational Assessment report.

Navigation:

Enterprise Learning > **Learning Reports** > **Educational Assessment**

This example illustrates the fields and controls on the Educational Assessment page.



Use this page to generate the Educational Assessment report that includes all the necessary information for the Bilan Pédagogique.

Note: This report only generates information for external learners.

Field or Control	***Description***
From Date and **To Date**	Enter a date range for the report.
Organization	Enter a value here to generate the report for external learners associated with a specific organization.
Learning Environment	Enter a value here to generate the report for external learners associated with a specific learning environment.

Chapter 33

Using the Learning Home

Defining the Learning Home Content and Layout

Pages Used to Define the Learning Home Content and Layout

Page Name	***Definition Name***	***Usage***
Personalize Content: Learning Home Page	PORTAL_HPCOMP	Specify which pagelets appear in your Learning Home.
Personalize Layout: Learning Home Page	PORTAL_HPLAYOUT	Define the layout of the pagelets in your Learning Home.

For more information about the Learning Home pagelets, see Using the Learning Home Pagelets

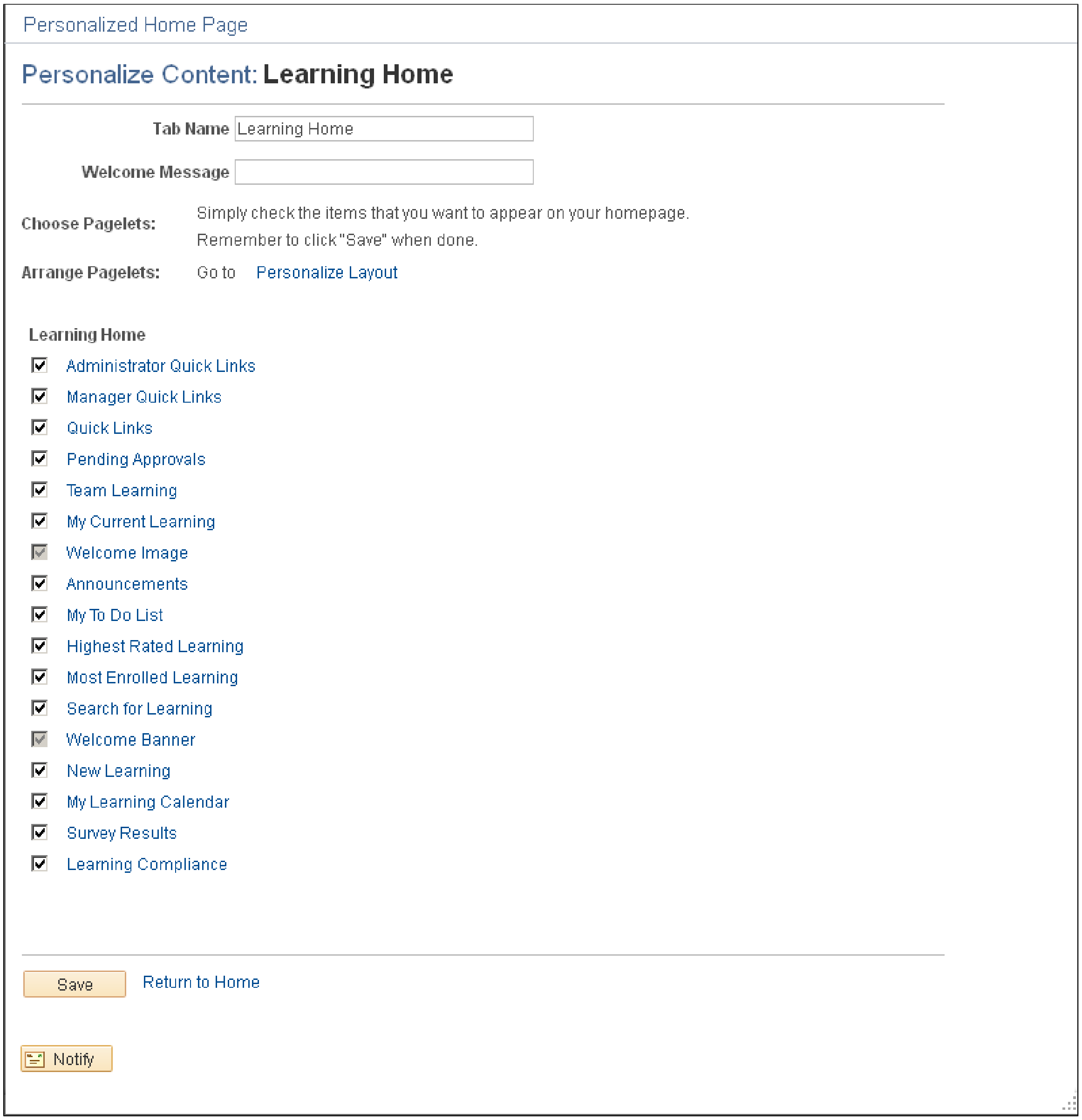
Personalize Content: Learning Home Page

Use the Personalize Content: Learning Home page (PORTAL_HPCOMP) to specify which pagelets appear in your Learning Home.

Navigation:

Click the **Content** link on the Learning Home page.

This example illustrates the fields and controls on the Personalize Content: Learning Home page.



Use this page to choose which pagelets you want to display in your Learning Home.

Field or Control	***Description***
Tab Name	Enter the title you want to appear for the Learning Home when users access it from the menu or from the **Learning Home** link at the top of self-service pages. **Note:** This title does not appear for the Learning Home when users first log in.
Welcome Message	The system adds the text you enter here next to the Oracle logo at the top of the Learning Home.

Field or Control	*Description*
Personalize Layout	Click to access the Personalize Layout: Learning Home Page.
<pagelet name>	Click a pagelet name link to see a preview of the pagelet.

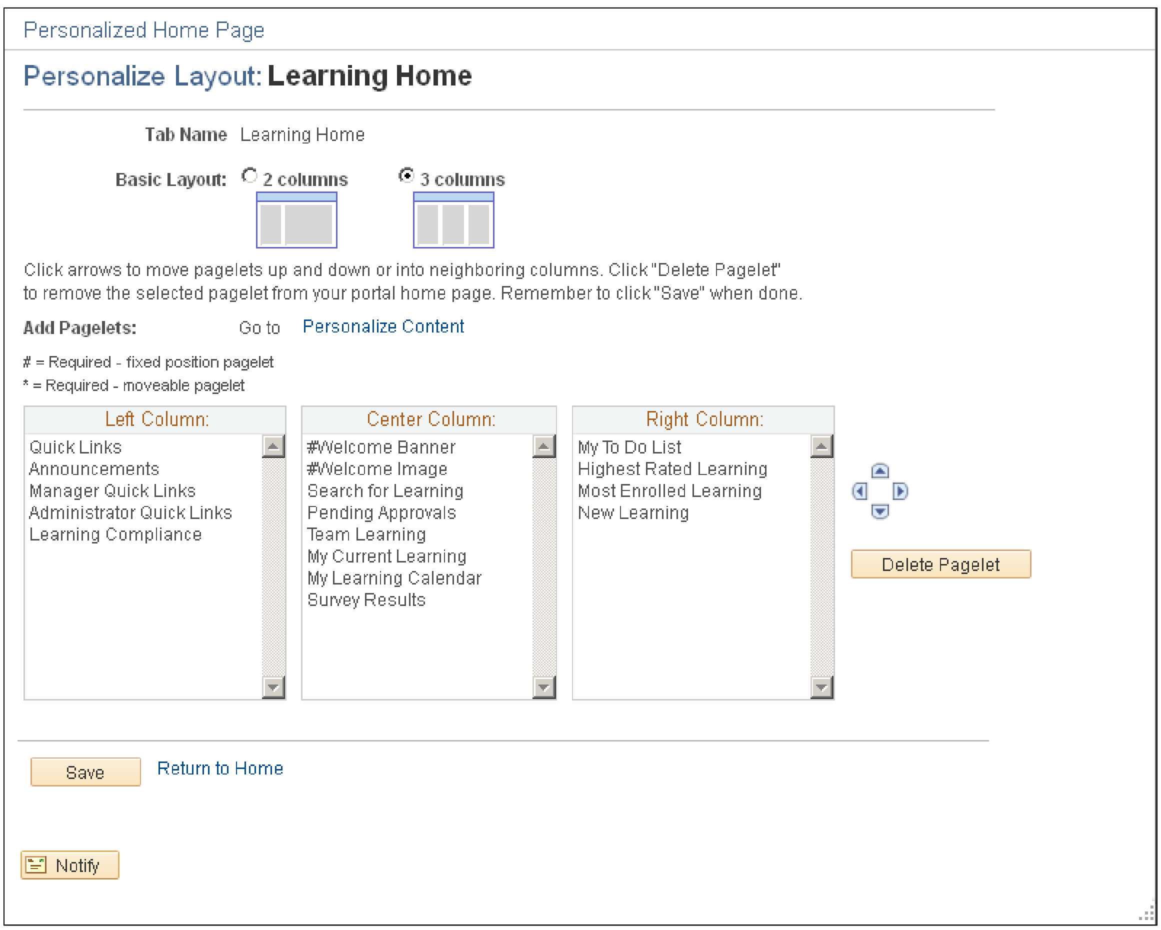
Personalize Layout: Learning Home Page

Use the Personalize Layout: Learning Home page (PORTAL_HPLAYOUT) to define the layout of the pagelets in your Learning Home.

Navigation:

Click the **Layout** link on the Learning Home page.

This example illustrates the fields and controls on the Personalize Layout: Learning Home page.



Use this page to define the arrangement of the pagelets in your Learning Home.

Using the Learning Home Pagelets

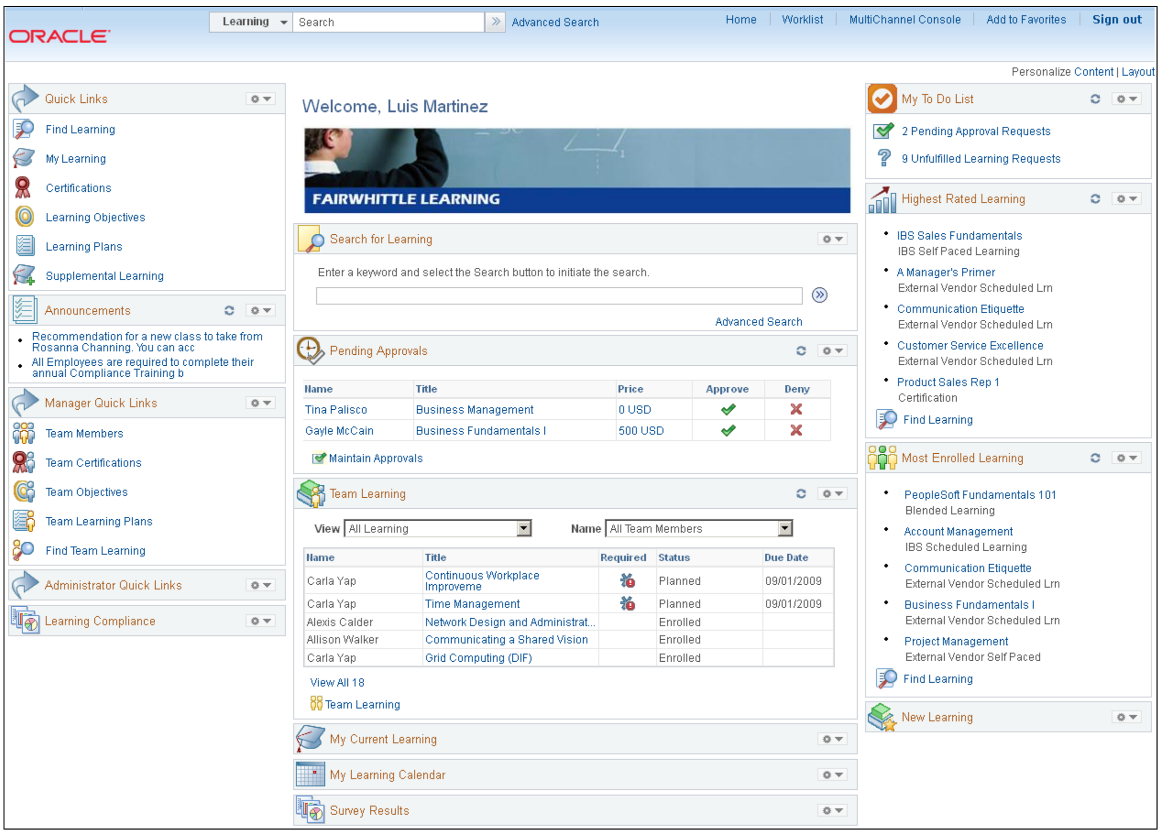
This topic provides an overview of the Learning Home and detailed information about each of its pagelets.

Understanding the Learning Home

The Learning Home is a personalized, role-based learning home page. The Learning Home provides the learning information your users need to quickly take actions and get back to their other work functions.

Click to watch a short video about Using the Learning Home.

This example illustrates the Learning Home page that the ELM system presents to users when they log in.



Delivered Learning Home Pagelets

The following pagelets are delivered for the Learning Home.

Note: The pagelets that are available for a user depend on that user's role within the system. For example, the Administrator Quick Links pagelet is available only for users with an administrator role.

Pagelet	***Definition Name***	***Usage***
Quick Links Pagelet	N/A	Navigate to the most frequently accessed learner transactions.
Manager Quick Links Pagelet	N/A	Navigate to the most frequently accessed manager transactions.
Administrator Quick Links Pagelet	N/A	Navigate to the most frequently accessed administrator transactions.
Announcements Pagelet	LM_ANNCMNT_PLT	View targeted announcements that can link directly to learning.
Search for Learning Pagelet	LM_SRCH_LRNG_PGL	Find learning quickly using a simple keyword search.
Pending Approvals Pagelet	LM_APPROVALS_PGL	Adjudicate approvals directly from the Learning Home.
My Current Learning Pagelet	LM_TS_CUR_LRNG_PGL	View and launch current learning.
Team Learning Pagelet	LM_HR_CUR_LRNG_PGL	View the learning status for a manager’s direct reports.
My Learning Calendar Pagelet	LM_CALENDAR_PGL	View a calendar of learning events in an easy-to-use format.
My To Do List Pagelet	LM_MTDL_PGL	View outstanding learning tasks that you can access directly.
Highest Rated Learning Pagelet	LM_PL_HR_PGL	View available learning that others have found useful.
Most Enrolled Learning Pagelet	LM_PL_ME_PGL	View learning opportunities that many others have completed.
New Learning Pagelet	LM_NEW_LRN_PGL	View newly available learning opportunities.

Pagelet	*Definition Name*	*Usage*
Learning Compliance Pagelet	LM_PG_PGLT	Managers and learning administrators can view a pivot grid of learner statuses for a particular class, course, or program.
Survey Results Pagelet	LM_SURVEY_PG	Managers and learning administrators can view a pivot grid of survey results.

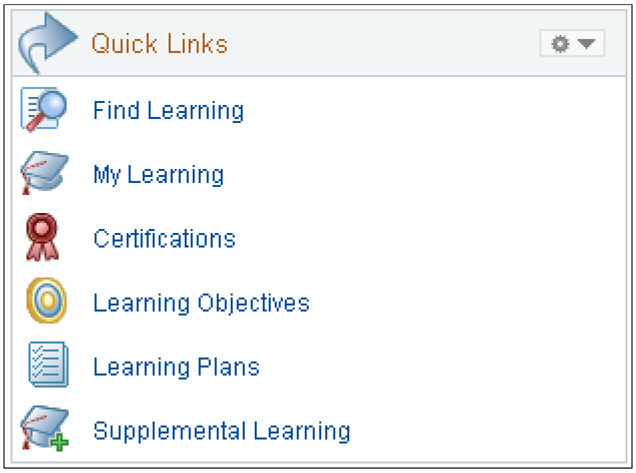
Common Elements Used in this Topic

Field or Control	*Description*
	Click the **Page Settings** icon to access the pagelet settings. Values are: • *Minimize:* select to minimize a pagelet. • *Expand:* select to expand a minimized pagelet. • *Remove:* select to remove the pagelet from the Learning Home. You can add it back using the Personalize Content: Learning Home Page. • *Personalize:* Select to specify which items you want to appear in the My To Do List pagelet. The *Personalize* pagelet setting is available only for the My To Do List Pagelet.
	Click the **Refresh Pagelet** icon to refresh the contents of the pagelet.

Quick Links Pagelet

Use the Quick Links pagelet to navigate to the most frequently accessed learner transactions.

This example illustrates the fields and controls on the Quick Links pagelet.



Field or Control	***Description***
Find Learning	Click to access the Find Learning Page.
My Learning	Click to access the My Learning Page.
Certifications	Click to access the Certification Status Page.
Learning Objectives	Click to access the Learning Objectives - Current Objectives Page.
Learning Plans	Click to access the Learning Plans - Current Learning Plans Page.
Supplemental Learning	Click to access the Add Supplemental Learning Page.

Manager Quick Links Pagelet

Use the Manager Quick Links pagelet to navigate to the most frequently accessed manager transactions.

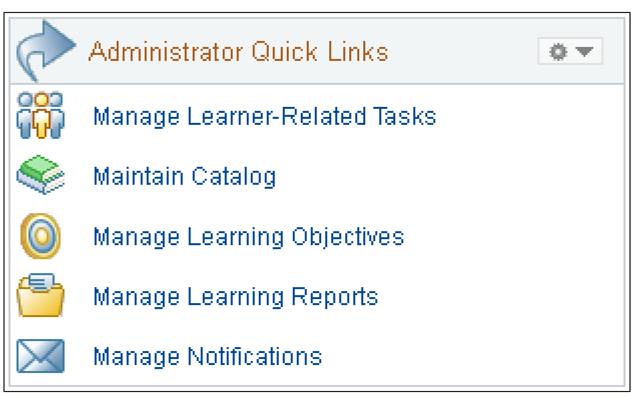
This example illustrates the fields and controls on the Manager Quick Links pagelet.

Field or Control	***Description***
Team Members	Click to access the Team Members Page.
Team Certifications	Click to access the Team Certification Status Page.
Team Objectives	Click to access the Team Learning Objectives - Current Objectives page.
Team Learning Plans	Click to access the Team Learning Plans - Current Learning Plans Page.
Find Team Learning	Click to access the Find Learning Page.

Administrator Quick Links Pagelet

Use the Administrator Quick Links pagelet to navigate to the most frequently accessed administrator transactions.

This example illustrates the fields and controls on the Administrator Quick Links pagelet.

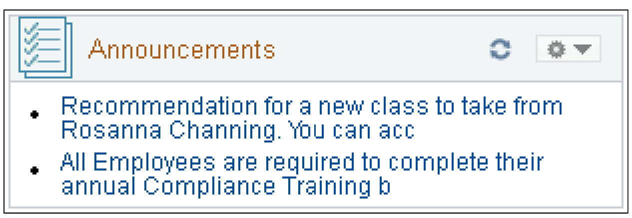


Field or Control	***Description***
Manage Learner-Related Tasks	Click to access a collection of links to learner task components.
Maintain Catalog	Click to access a collection of links to catalog maintenance components.
Manage Learning Objectives	Click to access a collection of links to learning objective components.
Manage Learning Reports	Click to access a collection of links to learning report components.
Manage Notifications	Click to access a collection of links to notification components.

Announcements Pagelet

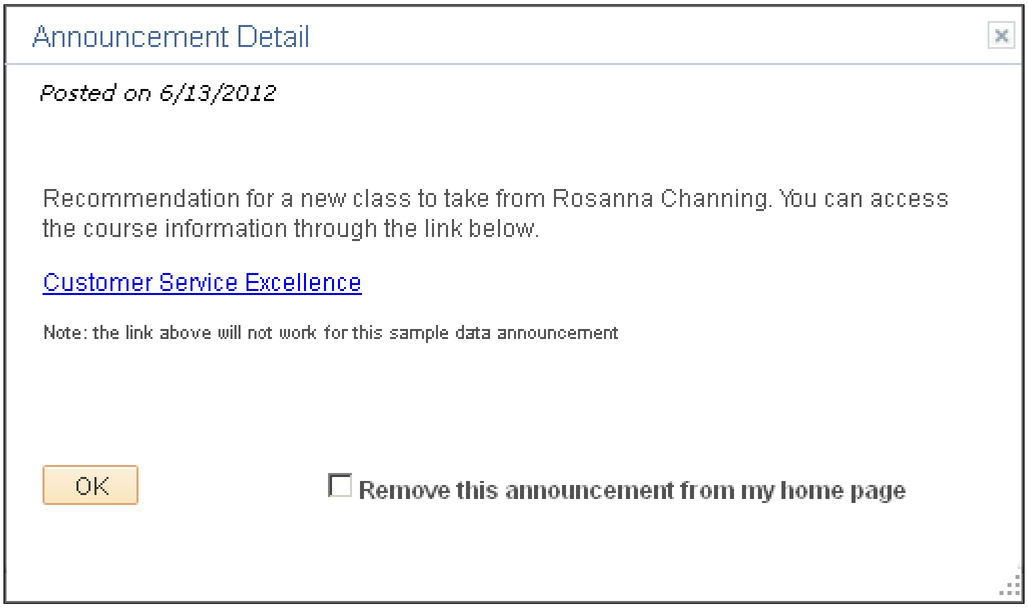
Use the Announcements pagelet (LM_ANNCMNT_PLT) to view targeted announcements that can link directly to learning.

This example illustrates the fields and controls on the Announcements pagelet.



Click an announcement link to view the entire announcement in the Announcement Detail page.

This example illustrates the fields and controls on the Announcement Detail page.



Field or Control	***Description***
Remove this announcement from my home page	Click to remove the announcement from the Announcements pagelet in the Learning Home. The user who creates the announcement determines whether this check box appears for it.

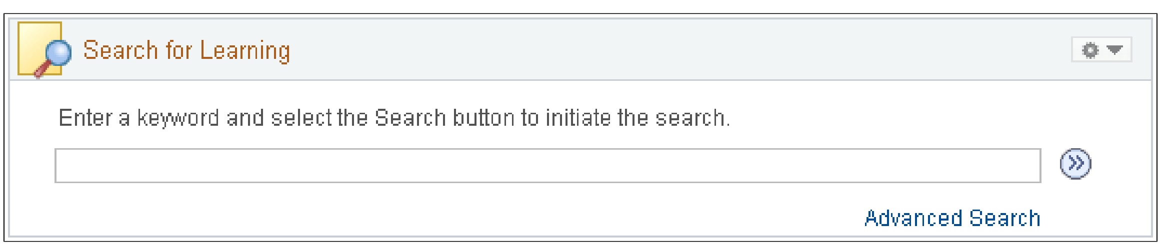
Related Links

Ad Hoc Notify and Announce Page

Search for Learning Pagelet

Use the Search for Learning pagelet (LM_SRCH_LRNG_PGL) to find learning quickly using a simple keyword search.

This example illustrates the fields and controls on the Search for Learning pagelet.



Enter a keyword and click the Search button to access the Find Learning page with results for your search.

Field or Control	*Description*
Advanced Search	Click to access the Find Learning page with the advanced search fields available.

Related Links

Find Learning Page

Pending Approvals Pagelet

Use the Pending Approvals pagelet (LM_APPROVALS_PGL) to adjudicate approvals directly from the Learning Home.

This example illustrates the fields and controls on the Pending Approvals pagelet.

Field or Control	*Description*
Name,Title, and **Price**	Click a link in any of these columns to open up the approval in the Enrollment Details page (for classes) or the Program Registration Details page (for programs). From those pages you can approve or deny the enrollment or registration.
Approve	Click to approve the enrollment or registration.
Deny	Click to deny the enrollment or registration.
Maintain Approvals	Click to access the Maintain Approvals page.

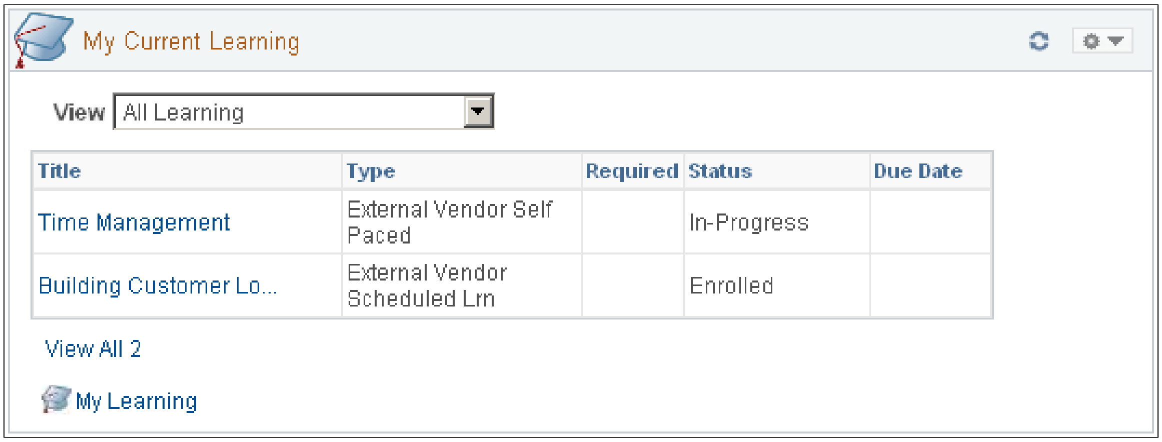
Related Links

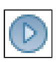
Approving Enrollment and Registration Requests

My Current Learning Pagelet

Use the My Current Learning pagelet (LM_TS_CUR_LRNG_PGL) to view and launch current learning.

This example illustrates the fields and controls on the My Current Learning pagelet.



Field or Control	***Description***
View	Select whether you want to view *All Learning*, or only *Required Learning*.
Title	Click a link in this column to view more details about a class or program.
	Click the **Launch** icon in the **Launch** column to launch a web-based class.
View All	Click to view all of your learning items in a popup page.
My Learning	Click to access the My Learning page.

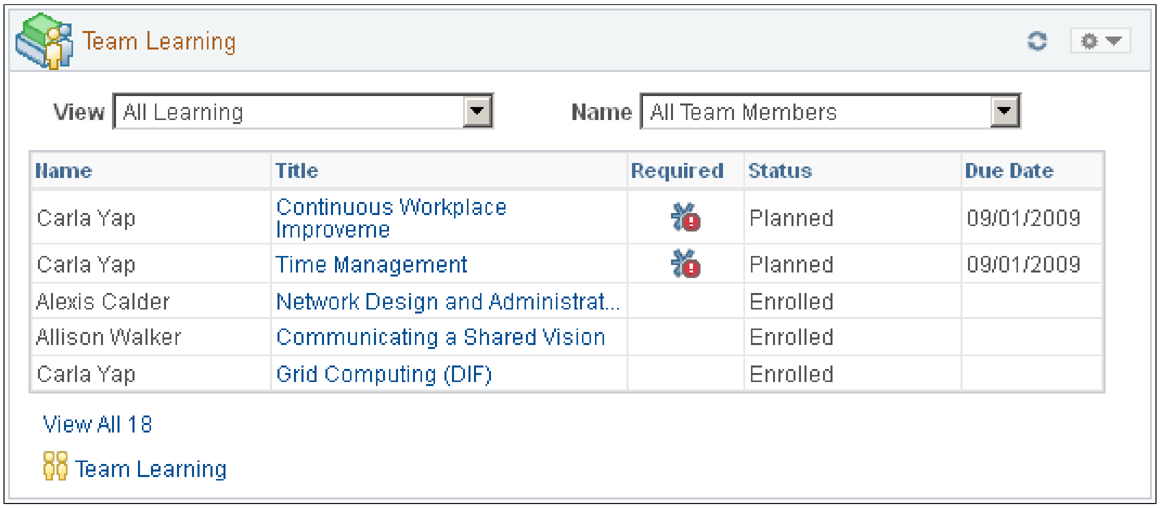
Related Links

My Learning Page

Team Learning Pagelet

Use the Team Learning pagelet (LM_HR_CUR_LRNG_PGL) to view the learning status for a manager's direct reports.

This example illustrates the fields and controls on the Team Learning pagelet.



Field or Control	***Description***
View	Select whether you want to view *All Learning*, or only *Required Learning*.
Name	Use this field to filter the learning displayed by learner name. By default, the value of this field is *All Team Members*.
Title	Click a link in this column to view more details about a class or program.
View All	Click to view all of your team members' learning items in a popup page.
Team Learning	Click to access the Team Learning page.

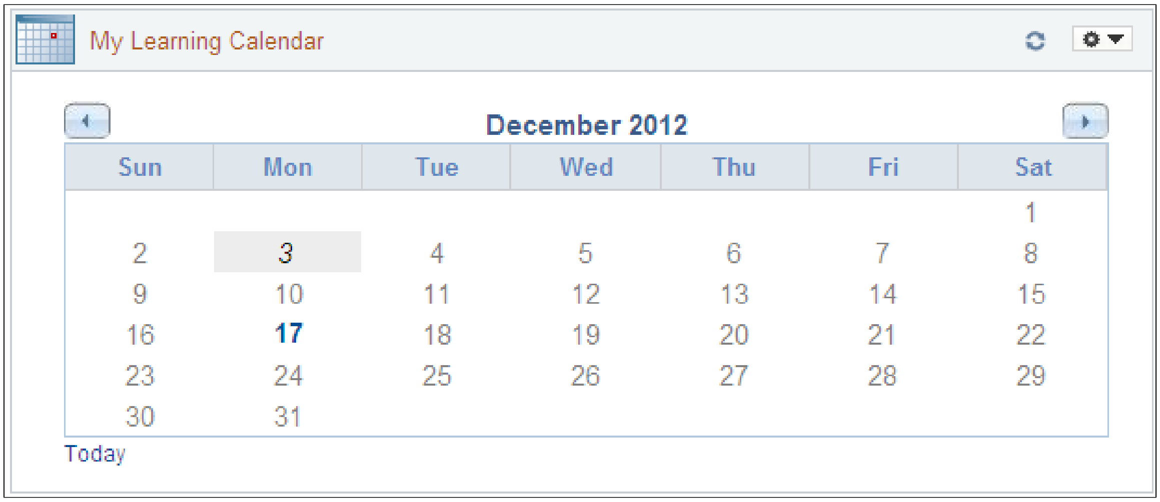
Related Links

Team Learning Page

My Learning Calendar Pagelet

Use the My Learning Calendar pagelet (LM_CALENDAR_PGL) to view a calendar of learning events in an easy-to-use format.

This example illustrates the fields and controls on the My Learning Calendar pagelet.



Dates with scheduled learning events appear bold and blue in the pagelet. Click a blue date to view the learning events on the Scheduled Learning page. From the Scheduled Learning page, you can click a learning event to access additional details about it.

The current date appears in italics. Click the **Today** link to go back to the current month and day.

Note: When accessing this pagelet in Accessible Layout mode, the calendar entries appear in a list rather than as part of the calendar graphic.

My To Do List Pagelet

Use the My To Do List pagelet (LM_MTDL_PGL) to view outstanding learning tasks that you can access directly.

This example illustrates the fields and controls on the My To Do List pagelet.

Field or Control	***Description***
Pending Approval Requests	Click to access the Maintain Approvals page. **Note:** This link can appear only for users with manager or administrator roles.

Field or Control	***Description***
Pending DIF Requests	Click to access the Maintain Pending DIF Requests page. **Note:** This link can appear only for users with administrator roles.
Unfulfilled Learning Requests	Click to access the Maintain Learning Requests - Current Learning Requests page. **Note:** This link can appear only for users with administrator roles.
Learning Event Today	Click to access the My Learning page.
Certifications Expiring Soon	Click to access the Certification Status page.
Learning Objectives Not Met	Click to access the Learning Objectives - Current Objectives page.
Learning Plan Items Not Completed	Click to access the Learning Plans - Current Learning Plans page.

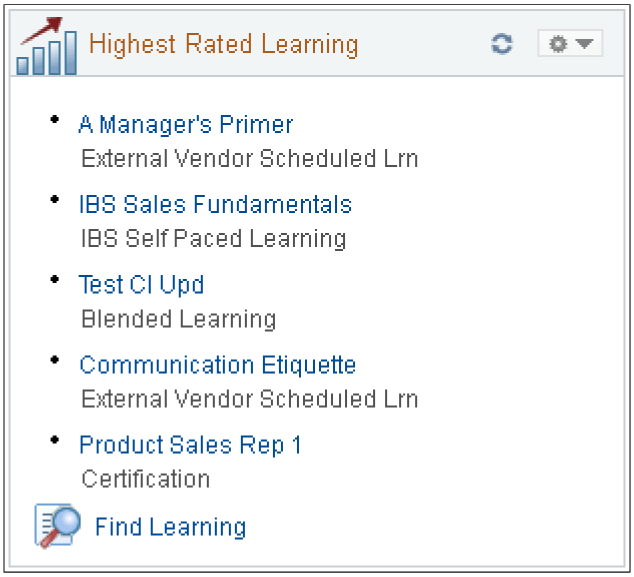
Related Links

Managing DIF Requests
Managing Learning Requests
My Learning Page
Certification Status Page
Learning Objectives - Current Objectives Page
Learning Plans - Current Learning Plans Page

Highest Rated Learning Pagelet

Use the Highest Rated Learning pagelet (LM_PL_HR_PGL) to view available learning that others have found useful.

This example illustrates the fields and controls on the Highest Rated Learning pagelet.



Click a learning item title to access the Course Details or Program Details page for the learning item. Click the **Find Learning** link to access the Find Learning page.

Related Links

Course Details Modal Page
Program Details Page
Find Learning Page

Most Enrolled Learning Pagelet

Use the Most Enrolled Learning pagelet (LM_PL_ME_PGL) to view learning opportunities that many others have completed.

This example illustrates the fields and controls on the Most Enrolled Learning pagelet.

Click a learning item title to access the Course Details or Program Details page for the learning item. Click the **Find Learning** link to access the Find Learning page.

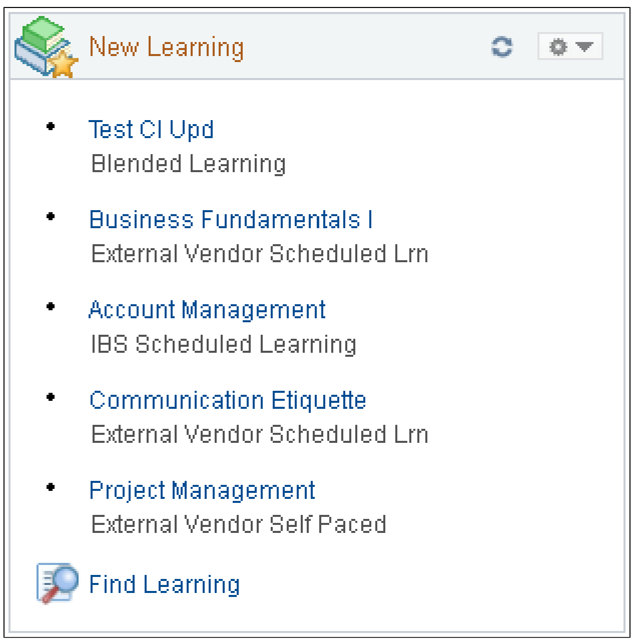
Related Links

Course Details Modal Page
Program Details Page
Find Learning Page

New Learning Pagelet

Use the New Learning pagelet (LM_NEW_LRN_PGL) to view newly available learning opportunities.

This example illustrates the fields and controls on the New Learning pagelet.



Click a learning item title to access the Course Details or Program Details page for the learning item. Click the **Find Learning** link to access the Find Learning page.

Related Links

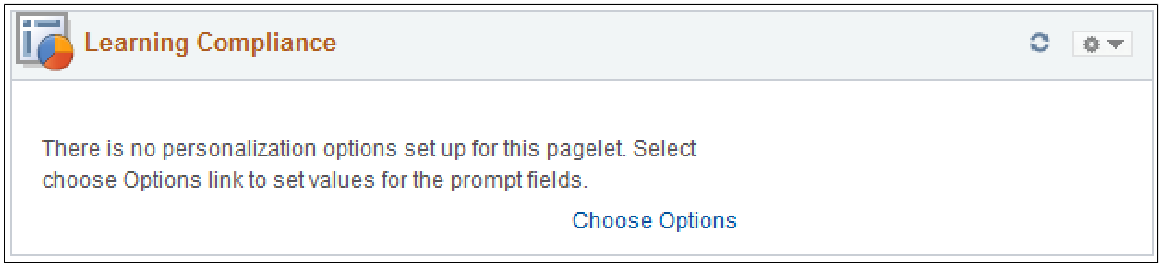
Course Details Modal Page
Program Details Page
Find Learning Page

Learning Compliance Pagelet

Use the Learning Compliance pagelet (LM_PG_PGLT) to view a pivot grid of learner statuses for a particular class, course, or program.

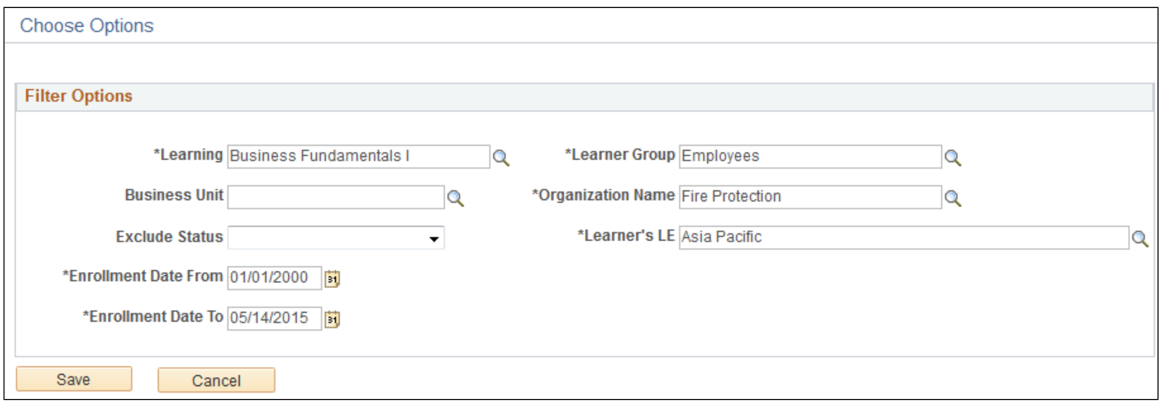
The first time you log in, the Learning Compliance pagelet displays a message indicating that no personalization options are set up for the pagelet and that you need to set the values for the prompt fields.

This example illustrates the fields and controls on the Learning Compliance pagelet before choosing options.



Field or Control	***Description***
Choose Options	Click to access the Choose Options modal page where you can set the filter options for the Learning Compliance pivot grid.

This example illustrates the fields and controls on the Choose Options page.

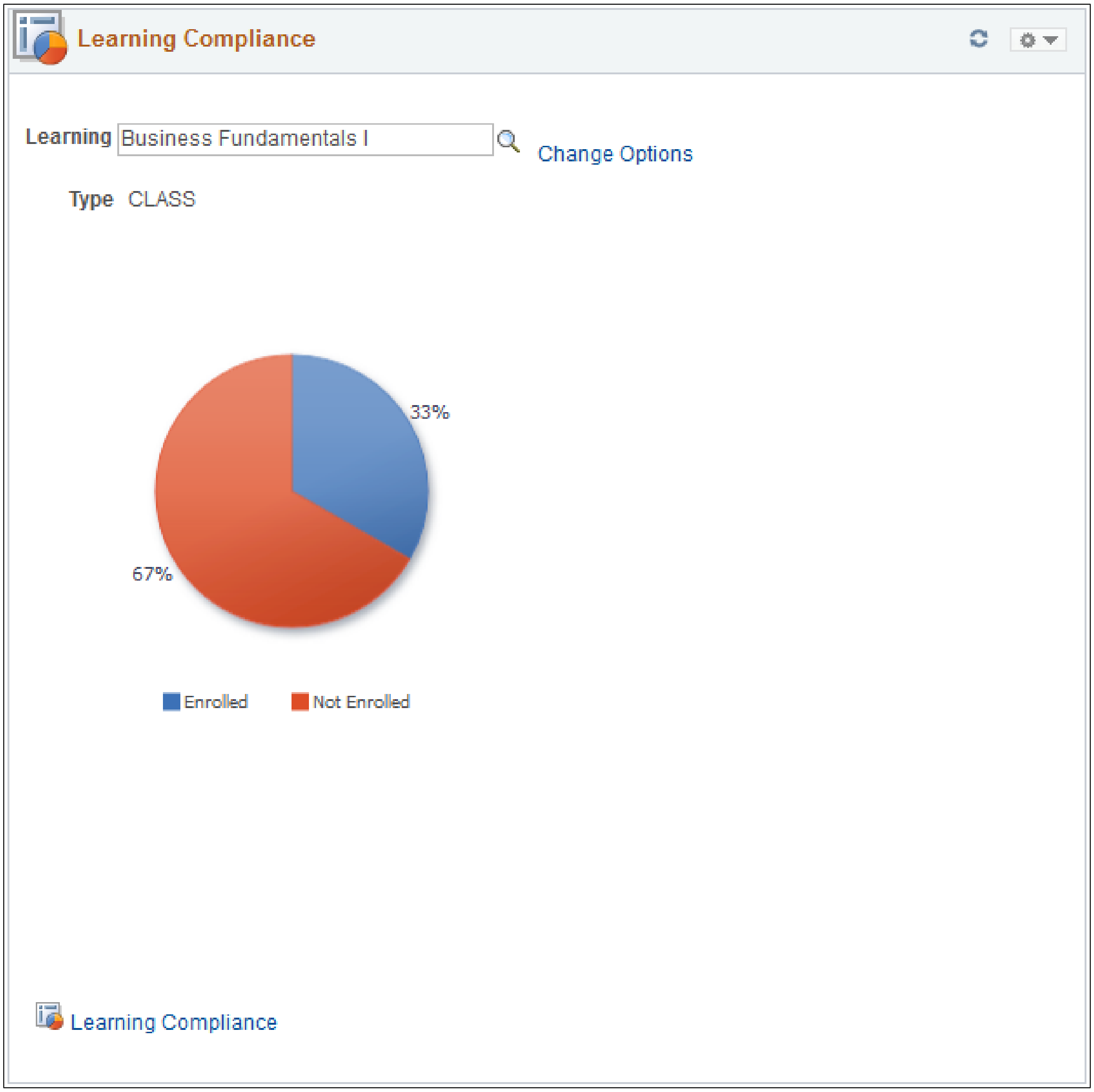


Field or Control	***Description***
Learning	Select the course, class, or program for which you want to view learning compliance information.

Field or Control	*Description*
Learner Group	Select a learner group associated with the selected learning environment. The value of this field is determined by the following factors: 1. When no filter options are currently saved for the pagelet, this field displays the default learner group of the administrator's learning environment. 2. If you change the value of the Learning field on the Choose Options page, the system clears the Learner Group field and accepts only values that are associated with the selected learning item. 3. If you change the value of the Learning field from the Learning Compliance pagelet, the system selects the Learner Group value of the learner group associated with the lowest Group ID that is associated with the selected learning item.
Business Unit	Enter a value to filter learners by business unit. By default, the value of this field is the administrator's business unit.
Organization Name	Enter a value to filter learners by organization. By default, the value of this field is the administrator's organization.
Exclude Status	Select the status of learners that you do not want displayed in the pivot grid.
Learner's LE (learner's learning environment)	Select the learning environment for which you want to view learning compliance information. The default value for this field is the administrator's current learning environment.
Enrollment Date From and **Enrollment Date To**	Define a range of enrollment dates (LM_ENRL_DT). The pivot grid displays learning compliance information only for learning items that fall within that date range. **Note:** If a learner has multiple enrollments within the specified date range, the pivot grid displays the status corresponding to the latest enrollment.

When you save your filter options, the Learning Compliance pagelet displays a graph of the specified learning compliance information.

This example illustrates the fields and controls on the Learning Compliance pagelet after choosing and saving options.

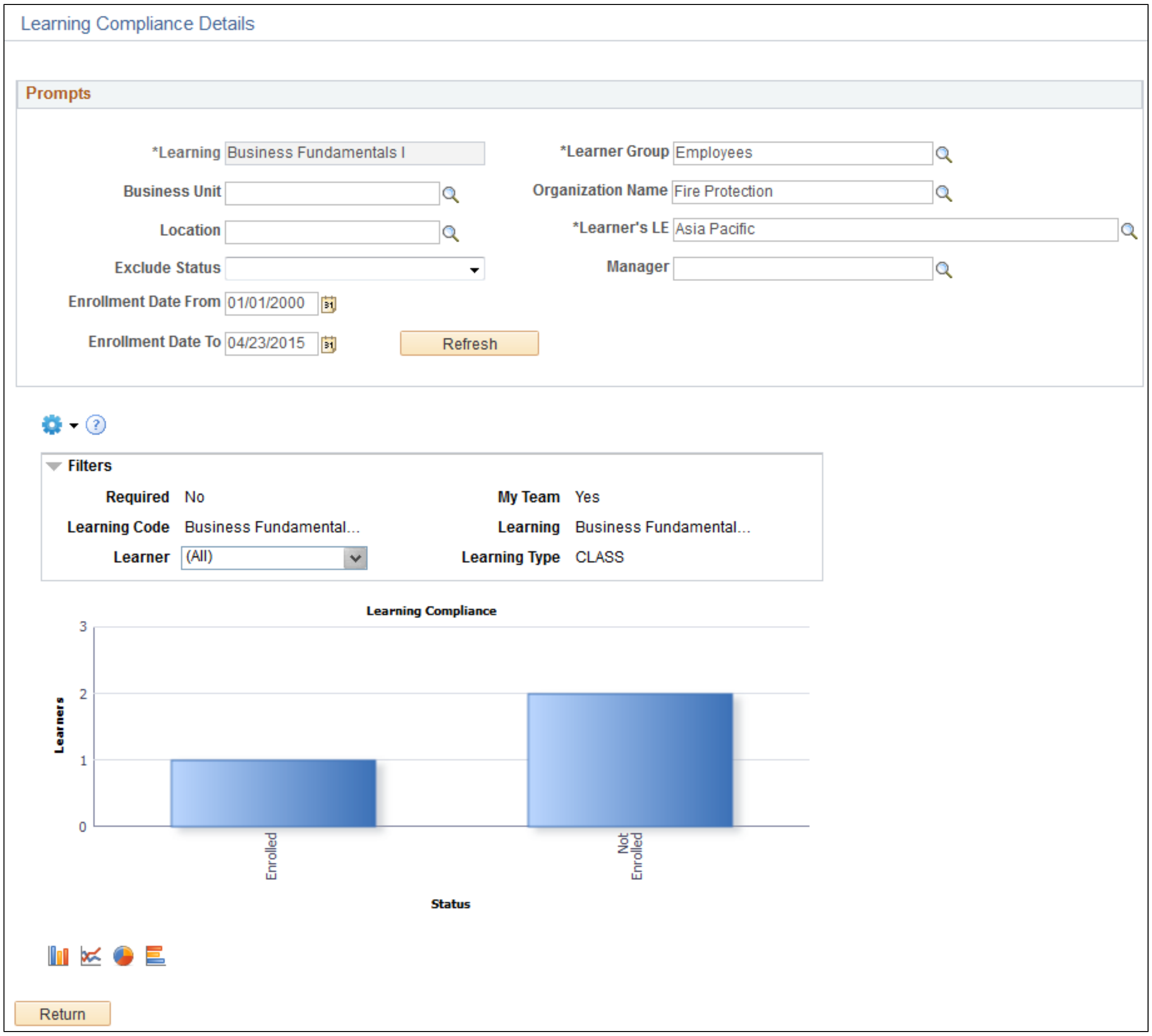


Field or Control	***Description***
Learning	Use this field to select a different learning item. The pagelet updates the graph of the learning compliance information for the selected learning item.
Change Options	Click to access the Choose Options page where you can update the selected filter options for the pivot grid.
Learning Compliance	Click to access the Learning Compliance Details modal page.

Clicking areas on the graph lets you drill down to display additional information. Select **Detailed View** to view detailed information in a modal grid. Select Drilldown To to view the graph broken down by **Learner**, **Organization Name**, or **Manager**.

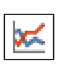
Learning Compliance Details Page

This example illustrates the fields and controls on the Learning Compliance Details page.



This page enables you to update the displayed learning compliance pivot grid. The default values of the fields in the **Prompts** group box are the values you set using the Choose Options page.

Field or Control	***Description***
Learning	Displays the course, class, or program for which you are viewing learning compliance information.
Learner Group	Select a learner group associated with the selected learning environment.

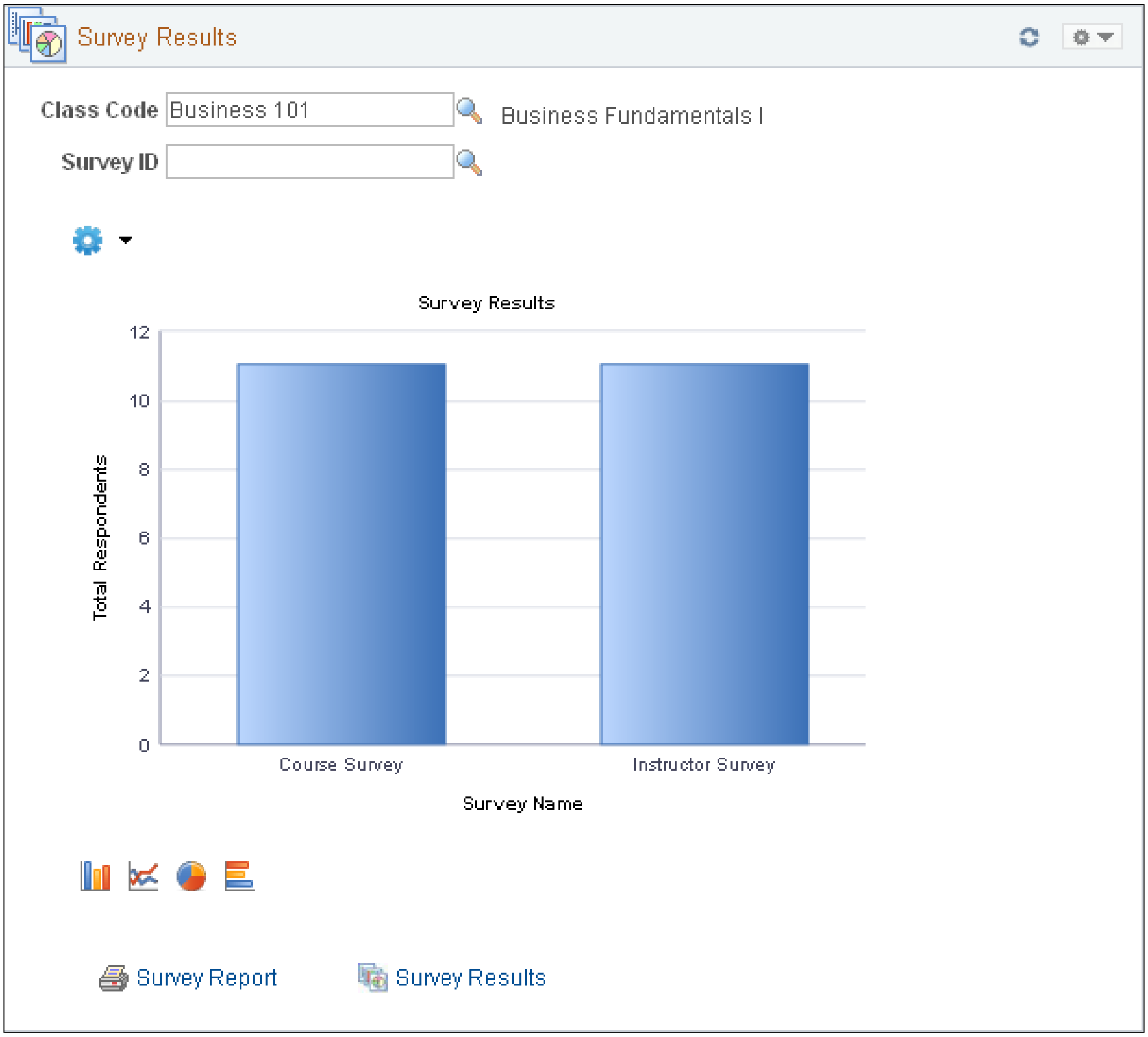
Field or Control	***Description***
Business Unit	Enter a value to filter learners by business unit.
Organization Name	Enter a value to filter learners by organization.
Location	Enter a value to filter learners by location.
Exclude Status	Select the status of learners that you do not want displayed in the pivot grid.
Manager	Enter a value to filter learners by manager.
Learner's LE (learner's learning environment)	Select the learning environment for which you want to view learning compliance information. The default value for this field is the administrator's current learning environment.
Enrollment Date From and **Enrollment Date To**	Define a range of enrollment dates (LM_ENRL_DT). The pivot grid displays learning compliance information only for learning items that fall within that date range. **Note:** If a learner has multiple enrollments within the specified date range, the pivot grid displays the status corresponding to the latest enrollment.
Refresh	Click to update the pivot grid with the selected filter options.
Learner	Select values to filter the displayed learning compliance data by learner.
	Click the **Bar Chart** icon to view the compliance data in a bar chart.
	Click the **Line Chart** icon to view the compliance data in a line chart.
	Click the **Pie Chart** icon to view the compliance data in a pie chart.
	Click the **Horizontal Bar Chart** icon to view the compliance data in a bar chart.

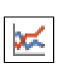
For more information on pivot grids, see the product documentation for *PeopleTools: Pivot Grid*.

Survey Results Pagelet

Use the Survey Results pagelet (LM_SURVEY_PG) to view a pivot grid of survey results.

This example illustrates the fields and controls on the Survey Results pagelet.

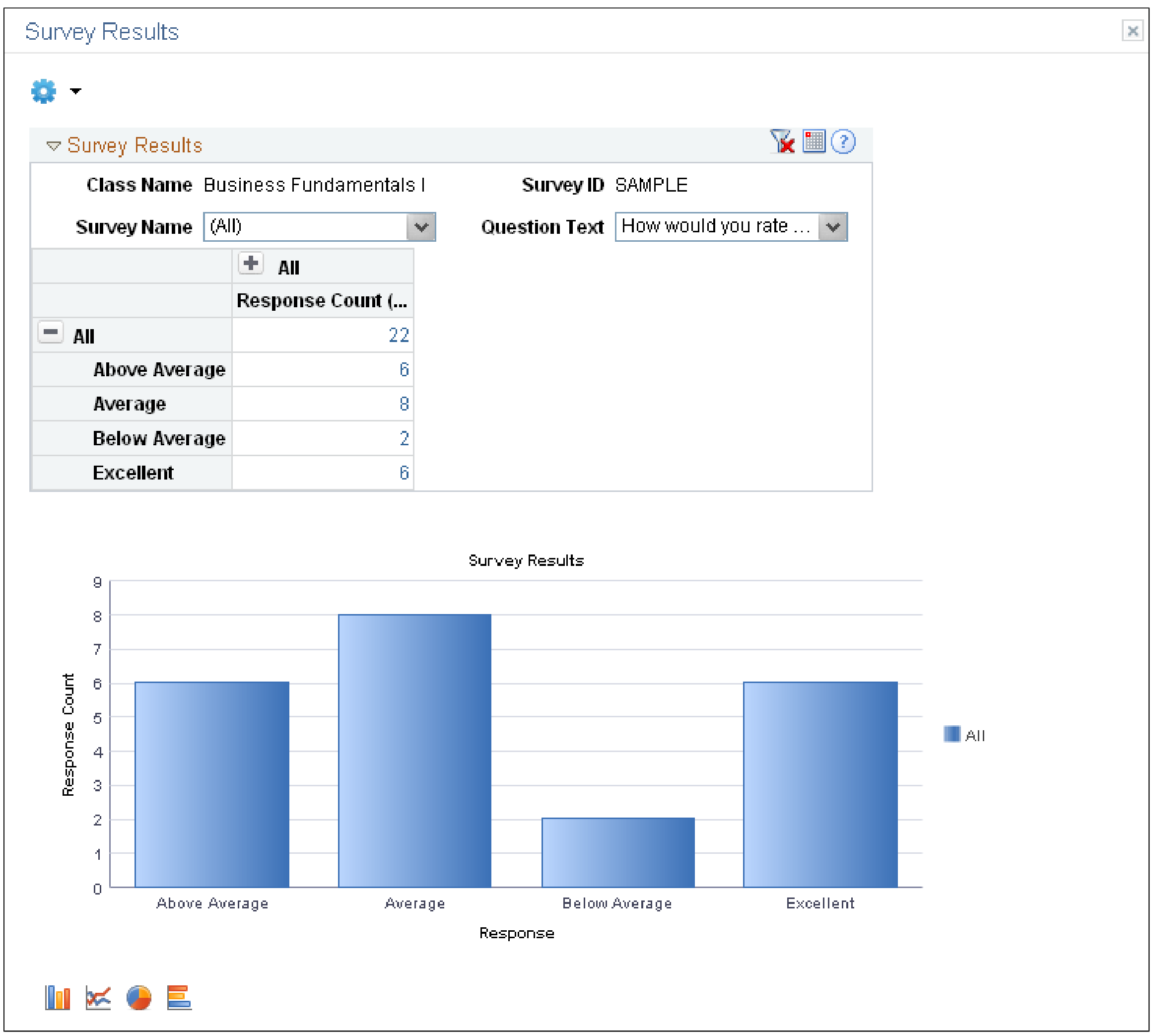


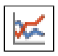
Field or Control	***Description***
Class Code and **Survey ID**	Use these fields to determine the survey results that are displayed. You can select a specific class code, a specific survey ID, or you can enter a value in both fields.
	Click the **Bar Chart** icon to view the survey data in a bar chart.
	Click the **Line Chart** icon to view the survey data in a line chart.
	Click the **Pie Chart** icon to view the survey data in a pie chart.

Field or Control	***Description***
	Click the **Horizontal Bar Chart** icon to view the survey data in a bar chart.
Survey Report	Click to generate the LMSURVEY report in PDF format. The report provides detailed survey results by question. To view an example of the LMSURVEY report, see the Report Samples that are published with this documentation.
Survey Results	Click to access the Survey Results Pivot Grid, which enables you to filter the data so that you can drill down to exactly the information you need.

Survey Results Pivot Grid

This example illustrates the fields and controls on the Survey Results pivot grid.



Field or Control	***Description***
Survey Name	Select a value to filter the data by a specific component of the survey.
Question Text	Select a value to filter the data by a specific question of the survey.
	Click the **Bar Chart** icon to view the survey data in a bar chart.
	Click the **Line Chart** icon to view the survey data in a line chart.
	Click the **Pie Chart** icon to view the survey data in a pie chart.
	Click the **Horizontal Bar Chart** icon to view the survey data in a bar chart.

For more information on pivot grids, see the product documentation for *PeopleTools: Pivot Grid*.

Chapter 34

Maintaining Learning Records and Objectives through Self-Service Pages

Understanding Learning Record and Objectives Management

Enterprise Learning Management delivers a set of self-service pages that learners can use to manage their learning records and objectives, and that managers can use to manage, monitor, and update the learning records and objectives of their team members (direct reports).

This topic discusses:

- Prerequisites.
- French-specific elements used in this topic.

Related Links

Understanding Objectives

Prerequisites

This topic lists prerequisites for using self-service pages to manage learning records and objectives.

- Displaying Objectives

  To have objectives with a status of needed or in progress appear in a separate grid on the self-service My Learning page, select the **Display Objectives** check box on the Install Defaults - General page. The objectives grid can display up to five objectives, and lists each objective's name, proficiency, status, target completion date, who assigned the objective, and the associated class or program.

  See Install Defaults – General Page.

- Displaying Certification Status

  To have certification programs with a status of complete, expired, or warning appear in a separate grid on the self-service My Learning page, select the**Display Certification Status** check box on the Install Defaults - General page. The system will display the program name, status, date, and a Recertify button.

  See Install Defaults – General Page.

- (FRA) Displaying DIF and DIF in Advance Training Hours Balances and Requesting Use of DIF Hours

  To have a learner's DIF and DIF in Advance balance hours appear on the self-service pages, select the **Enable French Features** check box on the Learning Environment - Defaults page. And to enable learners and managers to apply DIF hours towards their own or their team member's enrollment in a specific course, select the Eligible for DIF check box on the Item Details page in the Maintain Courses component (LM_CI_LA_CMP).

See Understanding Learning EnvironmentsUnderstanding Learner Groups.

- Using Learning Filters

  To enable learners and managers to search through the learning records, set up learning filters on the Learning Search Filter page.

  See .

(FRA) French-Specific Elements Used in This Topic

Field or Control	*Description*
(FRA) DIF	Indicates whether a class applies toward DIF. **Note:** This check box appears on the My Learning and Team Learning pages only if you select the Enable French Features check box for the learning environment.
(FRA) DIF Balance	This field displays the balance of DIF hours available to a learner based on the DIF entitlement law (*Droit Individuel à la Formation* [Individual Training Rights Law]).
(FRA) DIF in Advance	This field displays the balance of additional DIF hours granted by the employer beyond what is available in the DIF balance.

Maintaining Learning Records and Objectives Using Employee Self Service

Pages Used to Maintain Learning Records and Objectives Using Employee Self Service

Page Name	*Definition Name*	*Usage*
My Learning Page	LM_LEARNING_HM	Manage classes, programs, and learning objectives.
My Learning: Weekly Page	LM_WEEKLY_VIEW_SS	View scheduled learning sessions by week.
My Learning: Daily Page	LM_DAILY_VIEW_SS	View scheduled learning sessions by day.

Page Name	***Definition Name***	***Usage***
My Learning: Monthly Page	LM_MONTHLY_VIEW_SS	View scheduled learning sessions by month.
Certification Status Page	LM_CERT_STATUS	Review certification status.
Certification Status - Available Recertifications Page	LM_LRNR_RECERT	Learners view the available recertification programs for a particular certification and can register for a recertification program.
Learning Objectives - Current Objectives Page	LM_OBJV_LRNR	Review current learning objectives.
Add New Objective Page	LM_OBJV_ADD_OBJV	Learner searches for, selects, and assigns him/herself a new objective. If a rating model is associated with the objective, the learner must specify a proficiency level for the objective.
Learning Objectives - Objectives History Page	LM_OBJV_LRNR_HIST	Review completed learning objectives.
Maintain Objectives - Delete Confirmation Page	EO_DEL_CONFIRM	Learner confirms deletion of an objective.
View Objective Detail Page	LM_OBJV_DTL	Learner views details of an objective, including the proficiency level, status, target completion date, and who assigned the objective.
Add Supplemental Learning Page	LM_SEL_ADHC_TYP_SS	Learner selects the category of supplemental learning (external learning, equivalent experience, on-the-job training, and so on) that he/she needs.
Supplemental Learning Page	LM_ADHC_LRN_PG_SS	Enter supplemental learning details. This is the version of the page that learners access if the status of the supplemental learning is anything except *Complete*.
Supplemental Learning Page	LM_ADHC_UPD_PG_SS	View supplemental learning details. This is the version of the page that learners access if the status of the supplemental learning is *Complete*.

Page Name	***Definition Name***	***Usage***
Add Supplemental Learning: Search for New Objectives Page	LM_ADHC_OBJ_PG_SS	Learners add the objective for which they should receive credit when they complete their supplemental learning.
Class Progress Page	LM_ACT_PROG_SS	Learners review details of the class, including the class syllabus and all class components, schedules, grade and attendance records, notes and attachments, as well as approval and payment details. Learners can also drop classes and launch or relaunch compliant web-based tests, surveys, and assignments, as well as live webcasts.
<Program> Progress Page	LM_PRG_PROGRESS_SS	Learners can review completion details for each section of a program, review program objectives, review class completion rules, review registration details, and self-enroll in a program or drop their program registration.
Program Progress Page	LM_PRG_PROG_PG_SS	Review completion details for each section of a program and self-enroll in the classes that comprise the program.
Program Details Page	LM_PRG_DTL_PG_SS	Review the completion details, program objectives, and payment details for a program.
Enrollment Confirmation Page	LM_CONF_PROG_SS	View a confirmation for multiple learning object enrollment.
Class Progress - Assignment Progress Page	LM_LC_ASGN_PROG_SS	Learner updates the completion status for an assignment (if permitted) and enters notes about the assignment.
Class Progress - Webcast Progress Page	LM_LC_LWC_PROG_SS	Learner reviews his/her grade, score, attendance record, and progress on a live webcast.
Class Progress - Recorded Webcast Progress Page	LM_LC_WEB_PROG_SS	Learner reviews his/her grade, score, attendance record, and progress on a recorded webcast.
Class Progress - Web-based Progress Page	LM_LC_WEB_PROG_SS	Learner reviews his/her grade, score, attendance record, and progress on a web-based course.

Page Name	***Definition Name***	***Usage***
Class Progress - Test Progress Page	LM_LC_WEB_PROG_SS	Learner reviews his/her grade, score, attendance record, and progress on a test.
Class Progress - Survey Progress Page	LM_LC_WEB_PROG_SS	Learner reviews his/her grade, score, attendance record, and progress on a survey.
Class Progress - Sessions Progress Page	LM_LC_SES_PROG_SS	Learner reviews his/her grade, score, attendance record, and progress for a session.
Instructors Page	LM_INSTR_DTL	Learner views instructor information.
Class Details Page	LM_SS_ACT_DTL	Learner reviews details of the class, including the class syllabus and schedule, class components, related objectives, and notes and attachments. The learner can self-enroll in the class, or add the class to his/her learning plan.
Program Details Page	LM_PRG_SUMM_PG_SS	Learners view details of a program, including its description, sections and classes, objectives met, prerequisites, notes, and attachments. Also, learners can register for a program or add a program to a plan.
Assignee Information Page	LM_USER_PROF_POP	Review profiles of individuals or sources that added objectives or classes to learners' records.
Table of Contents Page	LM_TABLE_CONTENTS	Learners and administrators review the contents of a course, and select individual titles to launch each lesson in a compliant web-based, test, or survey component.
Review Information Page	• LM_REV_ENRLMT_SS • LM_REVIEW_REG_SS	Review class or program information, and enroll in a class or register for a program.
Review Information Page	LM_DP_REVW_ENRL_SS	Learner drops enrollment in classes.
Drop <Program> Page	LM_DP_REVW_REG_SS	Learner drops program registration.
Comments Page	LM_ACT_PROG_NOTES	Learners use this page to review instructor comments in their class records.

Page Name	***Definition Name***	***Usage***
Request Learning Page	LM_SS_LRN_REQ	• Learner requests a new class for an existing course in the catalog (for situations where there is an existing course but the course is full, is not scheduled at the right times, is in the wrong language, or does not otherwise meet the learner's needs). • Learner requests a new course not found in the catalog. In either case, the learner can enter preferences for delivery method, meeting days and times, language of instruction, and other parameters depending on your configuration, to enable the learning administrator to create and schedule the appropriate class.
Learning Request Confirmation Page	LM_SS_LRN_REQ_CONF	Learner receives confirmation of a learning request submission.

Learner Self-Service Actions

Learners can accomplish the following actions using the My Learning (LM_SS_LEARNING_UI) component:

Note: This list presents some of the more common My Learning actions; it does not include all possible actions.

- View class, curriculum, and certification progress.
- Create and update learning plans.
- Enroll in classes, register for programs, and add classes to a plan.

  Note: (FRA) If your system is configured to enable DIF tracking, you can request the use of DIF hour when entering an enrollment request.

- Drop classes or programs and remove classes and programs from a plan.
- Review certification status and enroll in recertification programs when current certification is expired.
- Add objectives to a learning plan and search for learning that satisfies the objectives.
- Request or add supplemental learning.
- Request new learning when the appropriate learning cannot be found or does not exist in the catalog.
- (FRA) View DIF and DIF in Advance balances and apply DIF hours towards training.

The following sections describe the steps a learner can take to accomplish some of the more common self-service actions.

Note: There are typically several ways to accomplish the same action on the self-service pages. The steps outlined here illustrate one possible way to accomplish these actions.

Enrolling in and Dropping Classes

To enroll in and drop classes:

1. Select Self Service, Learning, Find Learning.

   The Find Learning page appears.

2. Enter search criteria on the Find Learning page.

3. Review the classes displayed on the search results of the Find Learning page and click the **Enroll Now** button for the desired course or class.

   Note: If the class is a web-based course, you can launch the course and enroll in it simultaneously by clicking the **Launch** button.

   The Review Information page appears.

   Note: (FRA) If DIF tracking is enabled, the learner can select the **Apply Class Toward DIF** check box on the Review Information page to apply DIF balance hours towards his/her training.

   ---

4. Click the **Submit Enrollment** button on the Review Information page to enroll in the class.

5. Select Self Service, Learning, My Learning.

   The My Learning page appears

6. Review the information for the class on the My Learning page.

   If the class is a web-based course, you can launch the course by clicking the **Launch** button.

To drop a class in which you are enrolled:

1. Select Self Service, Learning, My Learning.

   The My Learning page appears.

2. On the My Learning page, click the **Drop** button next to the class you want to drop.

   The Review Information page appears.

3. Click the **Drop** button on the Review Information page to drop the class.

4. Click the **Return to Previous Page** link on the Review Information page.

   The My Learning page appears

5. Review the status of your classes on the My Learning page.

See Find Learning Page and Review Information Page.

Registering for and Dropping Programs

To register for and drop programs:

1. Select Self Service, Learning, Find Learning.

   The Find Learning page appears.

2. Enter search criteria on the Find Learning page.
3. Review the programs displayed on the search results of the Find Learning page and click the **Register** button for the desired program.

   The Review Information page appears.

4. Click the **Submit Registration** button on the Review Information page to register for the program.
5. Select Self Service, Learning, My Learning.

   The My Learning page appears

6. Review the information for the curriculum program on the My Learning page.

To drop a curriculum program you have enrolled in:

1. Select Self Service, Learning, My Learning.

   The My Learning page appears.

2. On the My Learning page, click the **Drop** button next to the curriculum program you want to drop.

   The Drop Curriculum - Review Information page appears.

3. Click the **Drop** button on the Review Information page to drop the program.

See Find Learning Page and Review Information Page.

Adding Objectives and Searching for Learning That Satisfies an Objective

To add objectives and search for learning that satisfies an objective:

1. Select Self Service, Learning, Learning Objectives.

   The Learning Objectives - Current Objectives page appears.

2. Click the **Add New Objective** button on the Learning Objectives page.

   The Add New Objective page appears.

3. Click the **Search** button on the Add New Objective page.

   The search results appear.

4. On the search results page, select the objective you want to add, enter the target completion date, indicate whether the objective is required, and click the **Add** button.

   The Learning Objectives - Current Objectives page appears.

5. Click the Save button on the Learning Objectives - Current Objectives page.

6. Click the **Find Learning** link on the Learning Objectives - Current Objectives page.

   The Find Learning page appears, displaying classes that satisfy the specified objective.

7. On the Find Learning page, click the **Enroll Now** button to enroll in a class that meets the desired objective.

   The Review Information page appears, showing the class that you have selected.

8. Click the Submit Enrollment button on the Review Information page to enroll in the class.

9. Select Self Service, Learning, My Learning

   The My Learning page appears

10. Review the information for the class on the My Learning page.

    If the class is a web-based course, you can launch the course by clicking the **Launch** button.

See Learning Objectives - Current Objectives Page and Find Learning Page.

Requesting or Adding Supplemental Learning

To request or add supplemental learning:

1. Select Self Service, Learning, Supplemental Learning.

   The Add Supplemental Learning Page appears.

2. On the Add Supplemental Learning page, select the type of supplemental learning (for example, equivalent experience, external learning, or on-the-job training) for which you want to receive credit and click the **Add Supplemental Learning** button.

   A second Add Supplemental Learning page appears on which you can enter detailed information about your supplemental learning request.

   Note: Define the supplemental learning types used by your organization on the Define Supplemental Learning - Details page.

3. Enter the requested information and select one of the following statuses: In Progress, Planned, or Submit for Approval.

4. If applicable, click the **Add Program** button or **Add Class** button to define the program or class that you want to receive credit for when you complete the supplemental learning.

   The Find Learning page appears.

5. Enter any additional search criteria to help find the program or class that you want to receive credit for and click **Search**.

6. Click the **Select** button for the program or class that you want to receive credit for.

   The Add Supplemental Learning page appears.

Note: If you want to receive credit for objectives, select the **Add Objective** button on the Add Supplemental Learning page and add an objective in the same way you previously added a program or class. When you do this, the system enables you to search for an objective to associate with the supplemental learning.

7. Click the Save button on the Supplemental Learning page.

Note: Not all supplemental learning provides credit towards the completion of programs, classes, and objectives–the type and scope of the credit that can be granted must be defined during setup of the different types of supplemental learning.

See Setting Up Supplemental Learning Types and Add Supplemental Learning Page.

Requesting New Learning (if existing learning does not meet needs or learning does not exist in the catalog)

To request new learning:

1. Select Self Service, Learning, My Learning.

   The My Learning page appears.

2. Click the **Request New Learning** link on the My Learning page.

   The Request Learning page appears.

3. On the Request Learning page, indicate whether you are:

   a. Requesting a class for an existing course that does not meet your needs (for example, existing course classes are in the wrong language, are delivered in the wrong locations or formats, or are currently not offered).

   b. Requesting an entirely new course for which there are no classes in the catalog.

4. If you are requesting a class for an existing course that does not meet your needs (option 1), click the **Search** button on the Request Learning page to search for the course.

   The Find Learning page appears.

5. Review the list of courses in the search results on the Find Learning page and click **Select** next to the course for which you are requesting a new class.

   This returns you to the Request Learning page.

6. If you are requesting an entirely new course for which there are no classes in the catalog (option 2), specify the learning category and the proposed title of the course in the **Category** and **Title** fields on the Request Learning page.

7. After selecting option 1 or 2, define your learning preferences on the Request Learning page (such as best days or times, preferred delivery method or language, preferred location) and click the **Submit Request** button.

   The Request Learning - Confirmation page appears.

Note: The learning administrator automatically receives notification when the number of learning requests for a particular course meets the learning request threshold defined on the Install Defaults - Enrollment page.

See Request Learning Page.

Creating and Updating Learning Plans

To create a new learning plan:

1. Select Self Service, Learning, Learning Plans.

   The Learning Plans - Current Learning Plans page appears.

2. Click the **Create New Learning Plan** link to add a new row to the page.

3. Enter a title for the new learning plan.

4. Click **Save** on the Learning Plans - Current Learning Plans page.

To add a class to a learning plan:

1. Select Self Service, Learning, Learning Plans.

   The Learning Plans - Current Learning Plans page appears.

2. Click the **Details** link next to the learning plan to which you want to add the class.

   The Learning Plan Details page appears.

3. Click the **Add New Learning to Plan** button.

   The Find Learning page appears.

4. Enter your search criteria and click the **Search** button.

   The Find Learning page appears with a list of courses and classes.

5. Click the **Select** button next to the class or course that you want to add.

   The Select Learning Plans page appears.

6. Select the check box next to the learning plan to which you want to add the class.

7. Click **OK** on the Select Learning Plans page.

   The Learning Plan Details page appears. Review the status of the newly added class and click the **Save** button.

See Managing Personal Learning Plans.

(FRA) Viewing DIF and DIF in Advance Balances

To view DIF and DIF in Advance balances:

1. Select Self Service, Learning, My Learning.

The My Learning page appears.

2. On the My Learning page, view your DIF and DIF in Advance balance hours.

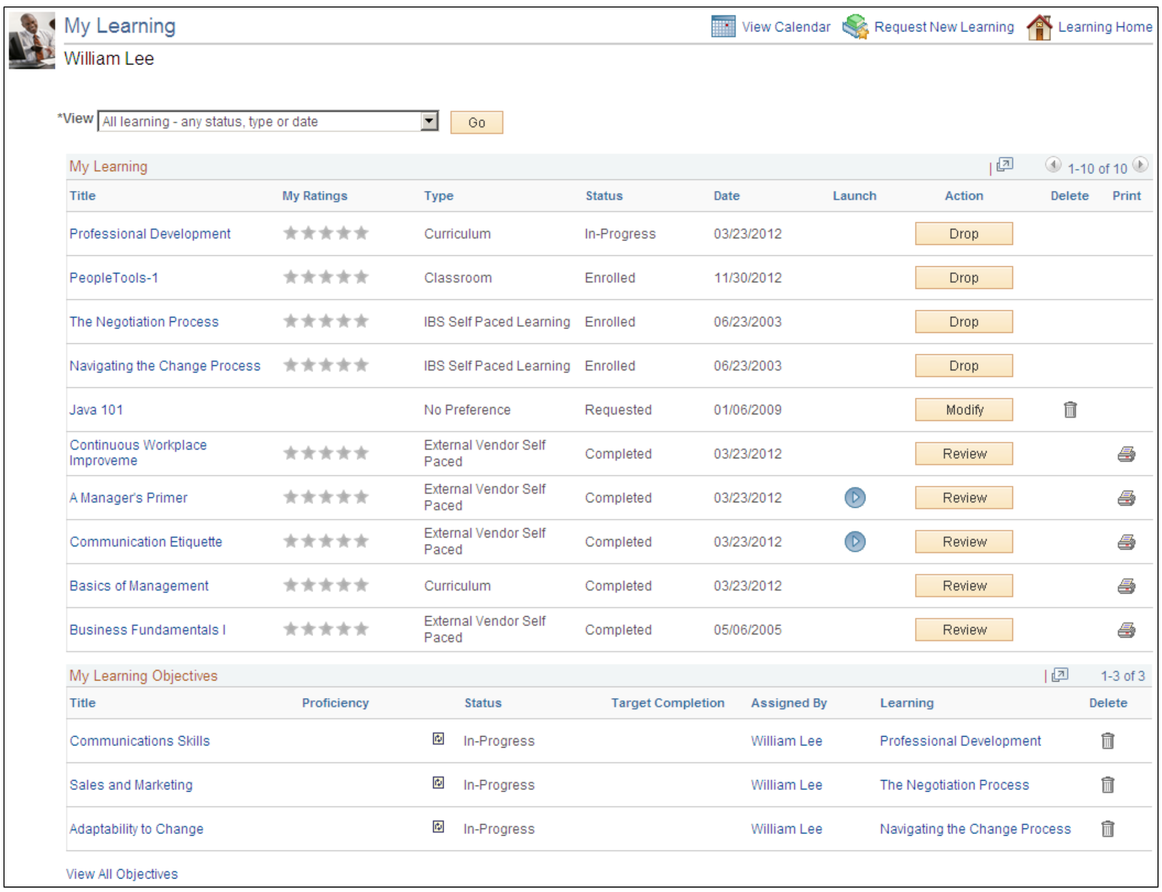
My Learning Page

Use the My Learning page (LM_LEARNING_HM) to manage current classes and programs.

Navigation:

- **Self Service** > **Learning** > **My Learning**
- Click the **My Learning** link in the Quick Links pagelet of the Learning Home.
- Click the **My Learning** link in the My Current Learning pagelet of the Learning Home.

This example illustrates the fields and controls on the My Learning page.



Learners can use buttons on the page to enroll in, delete, or drop a class or program, modify supplemental learning, or launch web-based learning. Available actions depend on business rules, such as add and drop deadlines and delivery method.

Field or Control	Description
View Calendar	Click to access the My Learning: Weekly page where you can view your scheduled learning sessions. This link appears only if the Display View Calendar option on the Self Service Home Page check box is selected on the Install Defaults - General page.
Request New Learning	Click to access the Request Learning page where you can request a new class for an existing course or request a new course not found in the catalog.
View	Select how you want to filter the learning items displayed in the My Learning group box. Values are: • All Planned, Requested, and Offered • All learning - any status, type, or date. • Completed External and Internal Learning • Completed learning for this calendar year • Current • Learning for last 90 days, not dropped or deleted. Click the **Go** button to filter your learning items according to your selection.

My Learning

Learners can use this group box to review their classes and programs.

Field or Control	Description
Title	Click a link in this column to access the Class Progress page for a class.
My Ratings	Displays the rating you have entered on the Rate/Review page for each completed learning item.
Type	Displays the type for each learning item.
DIF	For French learners, this column indicates whether the learning item is applied toward DIF.
Status	Displays the current status for each learning item.

Field or Control	***Description***
Date	Displays the latest status change date for the class. If the class is completed, then the completion date is displayed.
	For web-based classes, click this icon in the Launch column to launch the class.
Drop	Click to access the Drop <Program> page for programs and the Review Information page for classes. These pages enable you to drop a learning item.
Enroll	Click to access the Course Details page where you can enroll in a class, add it to your learning plan, or launch a class and enroll in it simultaneously.
Modify	Click to access the Request Learning page where you can modify a learning request. For supplemental learning items, clicking this button accesses the Supplemental Learning page.
Register	Click to access the Review Information page where you can register for a program.
Review	Click to access the Rate/Review page where you can enter ratings and reviews for a completed learning item.
	Click the **Delete** icon to delete a learning item.
	Click the **Print Completion Certificate** icon in the Print column for completed learning items to generate a completion certificate in PDF format.

Note: When learners add a class as *Planned* to their record, the system does not perform enrollment checking. However, if a learner attempts to enroll in a planned class, the system performs enrollment checking, and sets the class to either *Enrolled* or *Pending Approval* (if approval is required), or to *Pending Payment* if payment is still required.

My Learning Objectives

Learners can use this group box to review their learning objectives.

Field or Control	***Description***
Title	Click a link in this column to access the View Objective Detail page where you can view details for a learning objective.
Proficiency	Displays the proficiency associated with a learning objective.
Status	Displays the current status for each learning objective.
Target Completion	Displays any target completion dates for each learning objective.
Assigned By	Click a name link in this column to display the Assignee Information page for the person who assigned the learning objective.
Learning	Click a link in this column to access the Class Progress or <Program> Progress page for the learning item associated with the learning objective. For objectives with a status of *Needed*, this column displays the Find Learning link. Click it to access the Find Learning page with search results that match the learning objective.

My Certification Status

Learners can use this group box to review the status of their certifications. This group box appears only if the **Display Certification Status on the Self Service Home Page** check box is selected on the Install Defaults - General page. Additionally, this group box appears only for learners with certifications with a status of *Complete, Expired,* or *Warning*.

Field or Control	***Description***
Program Name	Click to access the <Program> Progress page where you can review detailed information about what is required to complete the program.
Status and **Status Date**	These display the current status for each certification and the date on which that status took effect.
Recertify	Click to access the Certification Status - Available Recertifications page where you can view the available recertification programs for a certification.

Field or Control	Description
	Click the **Print Completion Certificate** icon in the Print column for completed certifications to generate a completion certificate in PDF format.

(FRA) DIF Balance

For French learners, this page includes a DIF Balance group box that displays their DIF balances, DIF in advance balances, and planned DIF hours.

Field or Control	Description
Display DIF for Job	Select the learner's job for which you want to view DIF balances.

Related Links

Request Learning Page
Review Information Page
Find Learning Page

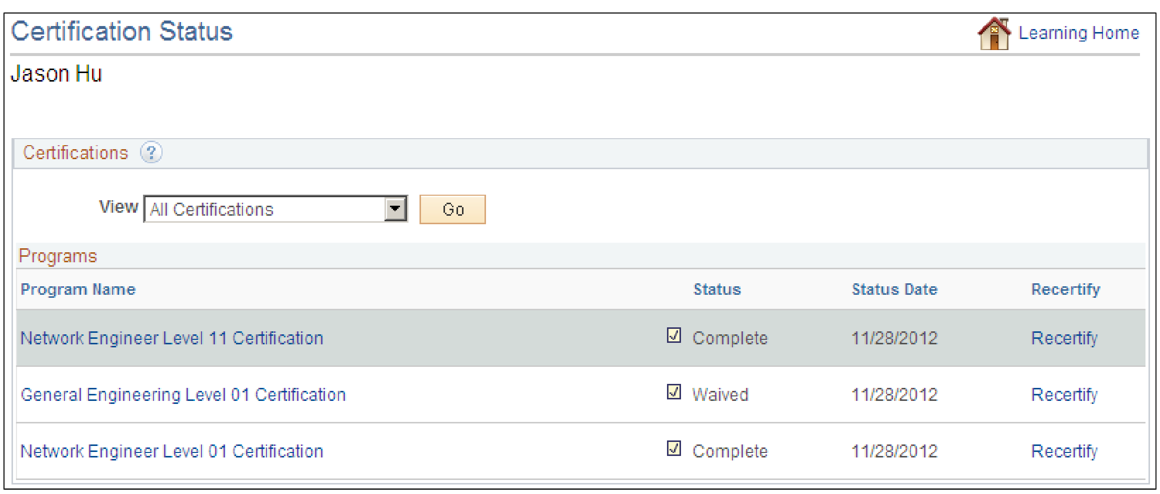
Certification Status Page

Use the Certification Status page (LM_CERT_STATUS) to review certification status.

Navigation:

- **Self Service** > **Learning** > **Certification Status**
- Click the **Certifications** link in the Quick Links pagelet of the Learning Home.

This example illustrates the fields and controls on the Certification Status page.



Field or Control	***Description***
View	Select how you want to filter the certifications displayed. Values are: • All Certifications • Certified • Expired • Warning Click the **Go** button to filter your certifications according to your selection.
Program Name	Click to access the <Program> Progress page where you can review detailed information about what is required to complete the program.
Status and **Status Date**	These display the current status for each certification and the date on which that status took effect.
Recertify	Click to access the Certification Status - Available Recertifications page where you can view the available recertification programs for a certification.

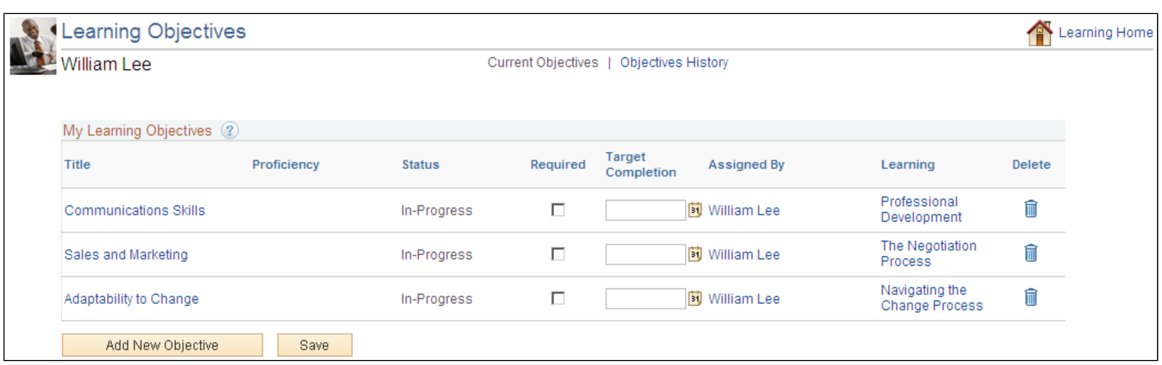
Learning Objectives - Current Objectives Page

Use the Learning Objectives - Current Objectives page (LM_OBJV_LRNR) to review current learning objectives.

Navigation:

- **Self Service** > **Learning** > **Learning Objectives**
- Click the **Current Objectives** link on the Learning Objectives - Objectives History page.
- Click the **Learning Objectives** link in the Quick Links pagelet of the Learning Home.

This example illustrates the fields and controls on the Learning Objectives - Current Objectives page.



Field or Control	*Description*
Title	Click a link in this column to access the View Objective Detail page where you can view details for a learning objective.
Proficiency	Displays the proficiency associated with a learning objective.
Status	Displays the current status for each learning objective.
Required	Select the check box in this column next to a learning objective to indicate that it is required.
Target Completion	Displays any target completion dates for each learning objective.
Assigned By	Click a name link in this column to display the Assignee Information page for the person who assigned the learning objective.
Learning	Click a link in this column to access the Class Progress or <Program> Progress page for the learning item associated with the learning objective. For objectives with a status of *Needed*, this column displays the Find Learning link. Click it to access the Find Learning page with search results that match the learning objective.

Learning Objectives - Objectives History Page

Use the Learning Objectives - Objectives History page (LM_OBJV_LRNR_HIST) to review completed learning objectives.

Navigation:

Click the **Objectives History** link on the Learning Objectives - Current Objectives page.

This example illustrates the fields and controls on the Learning Objectives - Objectives History page.

Learners can use this page to view a record of their completed objectives within a specified date range.

Field or Control	***Description***
From and **To**	Enter a date range for the completed learning objectives you want to view and click **Go** to filter the displayed learning objectives by the date range you entered.
Title	Click a link in this column to access the View Objective Detail page where you can view details for a learning objective.
Proficiency	Displays the proficiency associated with a learning objective.
Completed	Displays the date on which the learning objective was completed.
Assigned By	Click a name link in this column to display the Assignee Information page for the person who assigned the learning objective.
Learning	Click a link in this column to access the Class Progress or <Program> Progress page for the learning item associated with the learning objective.

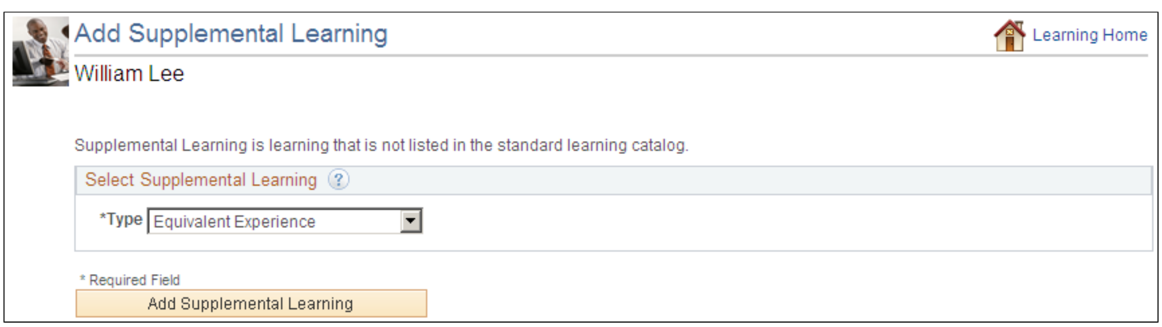
Add Supplemental Learning Page

Use the Add Supplemental Learning page (LM_SEL_ADHC_TYP_SS) to select the category of supplemental learning (external learning, equivalent experience, on-the-job training, and so on) that you need.

Navigation:

- **Self Service** > **Learning** > **Supplemental Learning**
- Click the Supplemental Learning link in the Quick Links pagelet of the Learning Home.

This example illustrates the fields and controls on the Supplemental Learning page.



Field or Control	***Description***
Type	Select the category of supplemental learning that you need.

Field or Control	***Description***
Add Supplemental Learning	Click to access the Supplemental Learning page where you can enter the details for the supplemental learning.

Related Links

Supplemental Learning: General Attributes Page

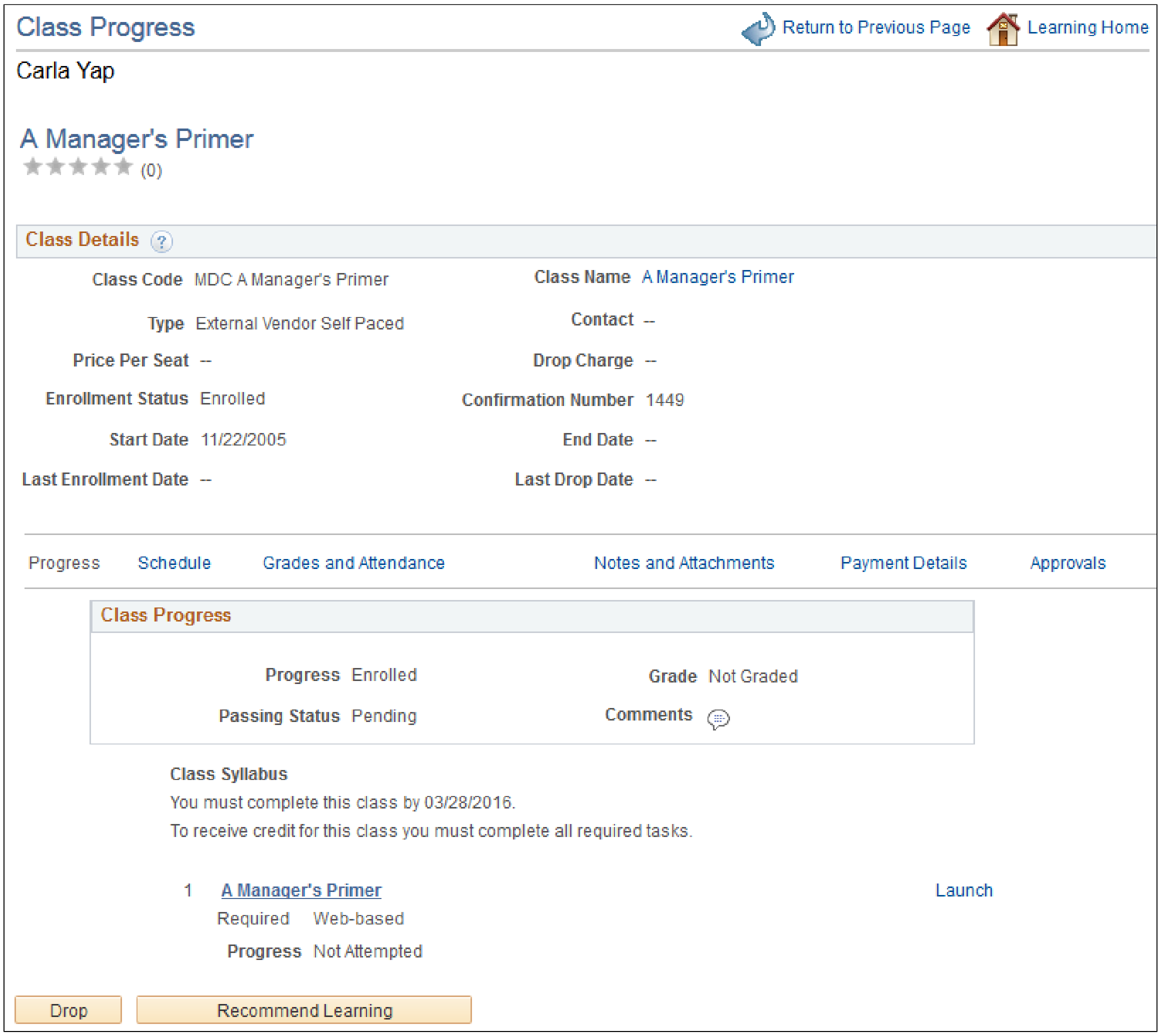
Class Progress Page

Use the Class Progress page (LM_ACT_PROG_SS) to review details of the class, including the class syllabus and all class components, schedules, grade and attendance records, notes and attachments, as well as approval and payment details.

Navigation:

- Click the name of the class in the **Title** column of the My Learning group box on the My Learning Page for classes with a status of *Enrolled, In-Progress, Pending Approval, Pending Payment,* or *Waitlisted.*
- Click the name of the class in the **Title** column of the Team Learning Pagefor classes with a status of *Enrolled, In-Progress, Pending Approval, Pending Payment,* or *Waitlisted.*
- Click the Go To Class Progress link on the Enroll In Class (Confirmation) Page or the Enroll Learners - Review Enrollment (Confirmation) Page.

This example illustrates the fields and controls on the Class Progress page.



Field or Control	***Description***
Drop	Click to access the Drop Class page where you can drop the class.
Recommend Learning	Click to access the Recommend Learning Page where you can send a recommendation notification to another ELM user for the class.

Progress

Click the **Progress** link to see an overview of the progress made toward completing the class.

Field or Control	***Description***
<Class Title>	Click to review additional completion details for the class.

Schedule

Click the **Schedule** link to view any scheduled sessions for the class.

Grades and Maintenance

Click the **Grades and Maintenance** link to view the class syllabus and objectives that this class satisfies. You can click an objective to access the View Objective Detail page where you can view detailed information about the objective.

Notes and Attachments

Click the **Notes and Attachments** link to view any notes or attachments for the class.

Payment Details

Click the **Payment Details** link to view additional information about payments made for the class.

Approvals

Click the **Approvals** link to view the approval details associated with the class.

<Program> Progress Page

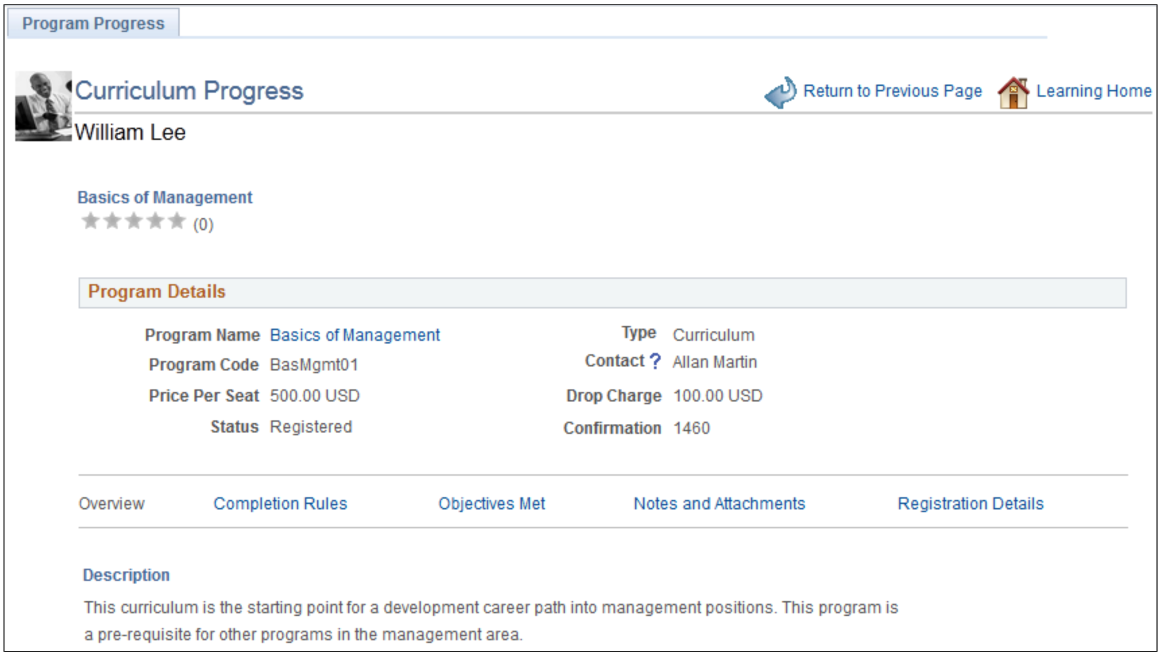
Use the <Program> Progress page (LM_PRG_PROGRESS_SS) to review completion details for each section of a program, review program objectives, review class completion rules, review registration details, and self-enroll in a program or drop their program registration.

Note: This is the page that you access when the Allow Enrollment in Multiple Learning Objects check box is deselected on the Install Defaults – General Page. If the check box is selected, you access the Program Progress Page instead.

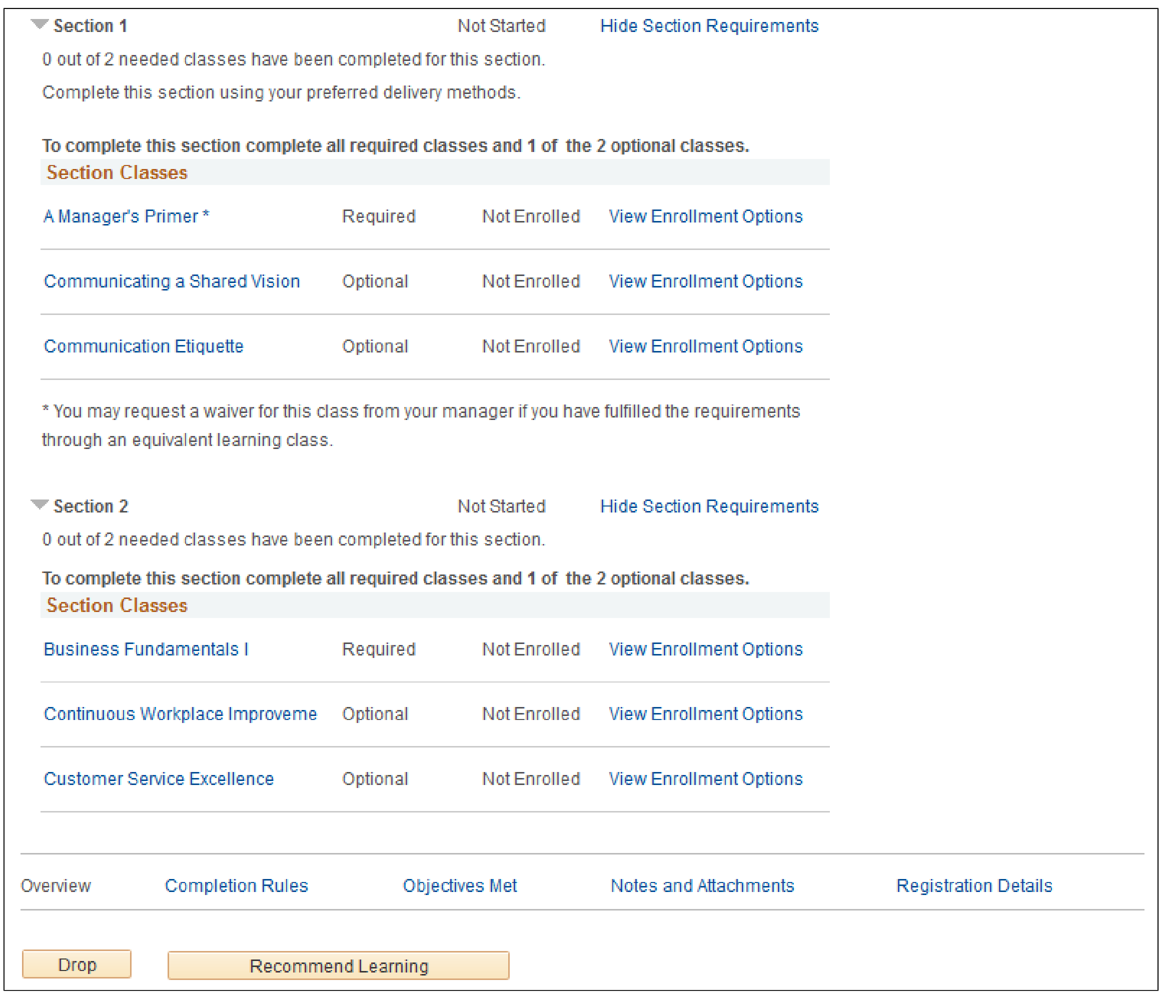
Navigation:

- Click the name of the program in the Title column of the My Learning group box on the My Learning page.
- Click the name of the program in the Program Name column on the Certification Status page.

This example illustrates the fields and controls on the <Program> Progress page.



This example illustrates the fields and controls on the <Program> Progress page.



Field or Control	***Description***
Drop	Click to access the Drop <Program> page where you can drop the program registration.
Recommend Learning	Click to access the Recommend Learning Page where you can send a recommendation notification to another ELM user for the program.

Overview

Click the **Overview** link to see an overview of the program including the classes that it comprises.

Field or Control	***Description***
<Class Title> and **View Enrollment Options**	Click to access the Course Details Page where you can review details and options for the class.
Launch	Click to launch a class and enroll in it simultaneously.

Completion Rules

Click the **Completion Rules** link to view any completion rules that have been defined for the program.

Objectives Met

Click the **Objectives Met** link to view the objectives that this class satisfies. You can click an objective to access the View Objective Detail page where you can view detailed information about the objective.

Notes and Attachments

Click the **Notes and Attachments** link to view any notes or attachments for the program.

Registration Details

Click the **Registration Details** link to view additional information about the registration including payment details.

Program Progress Page

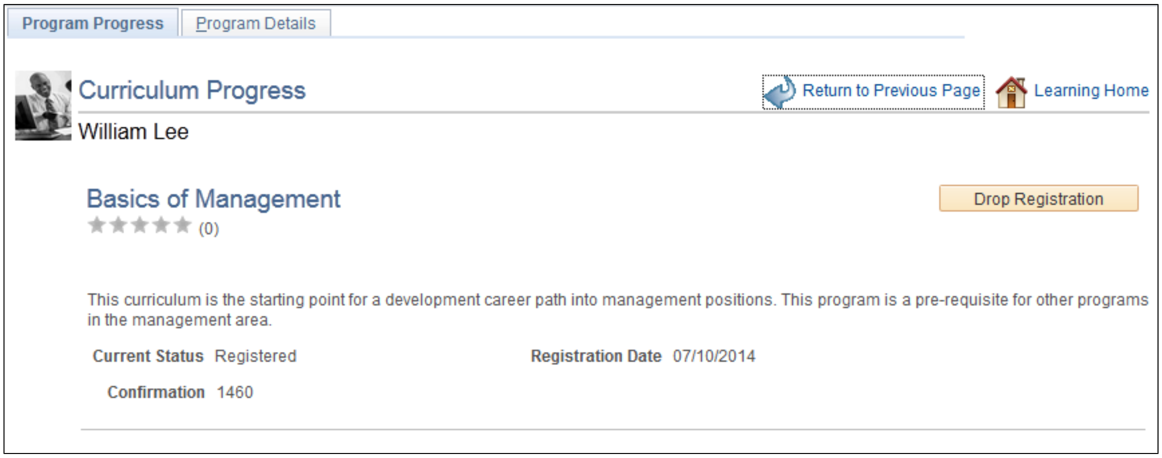
Use the Program Progress page (LM_PRG_PROG_PG_SS) to review completion details for each section of a program and self-enroll in the classes that comprise the program.

Note: This is the page that you access when the Allow Enrollment in Multiple Learning Objects check box is selected on the Install Defaults – General Page. If the check box is deselected, you access the Program Progress Page instead.

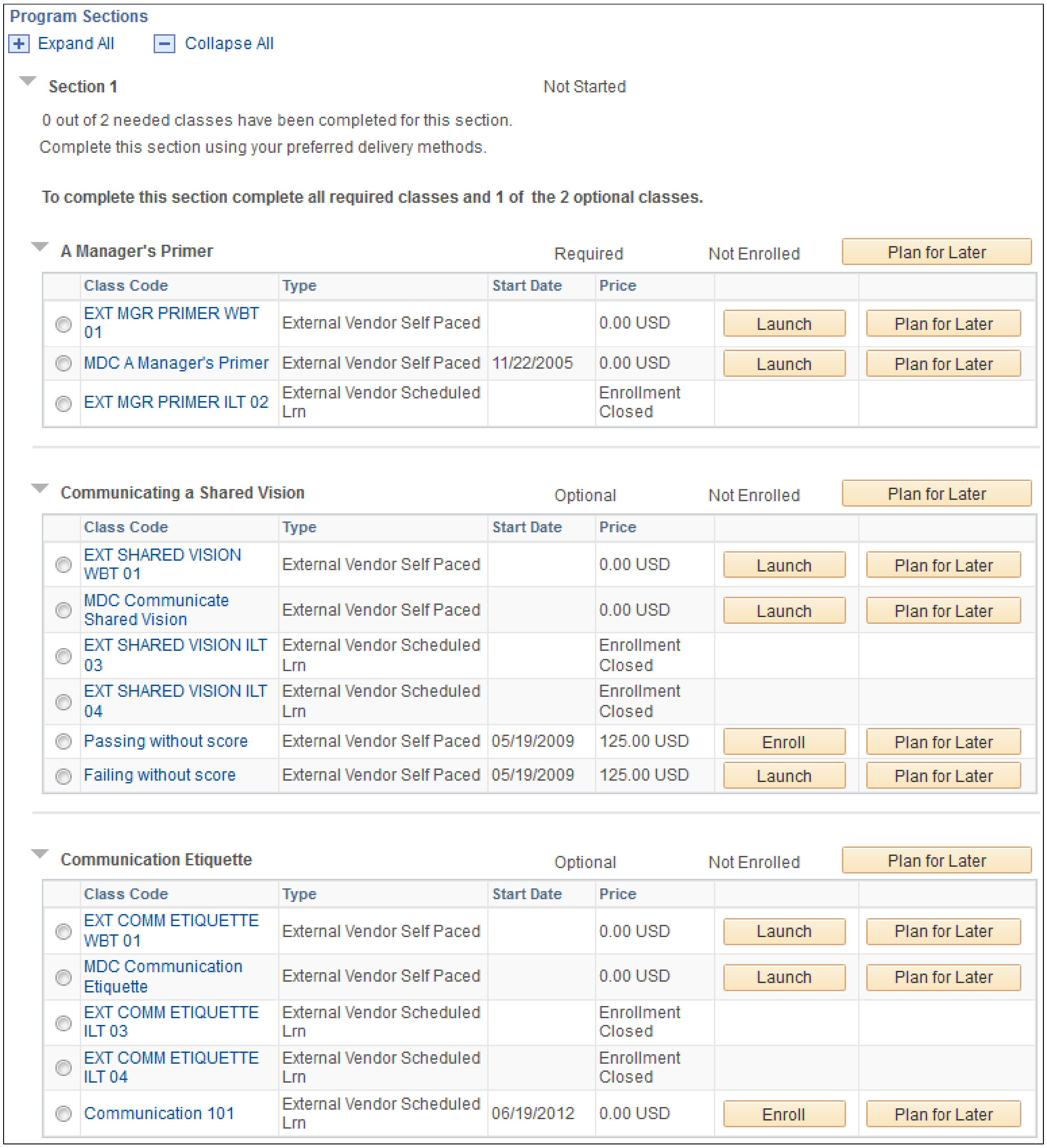
Navigation:

- Click the name of the program in the Title column of the My Learning group box on the My Learning page.
- Click the name of the program in the Program Name column on the Certification Status page.

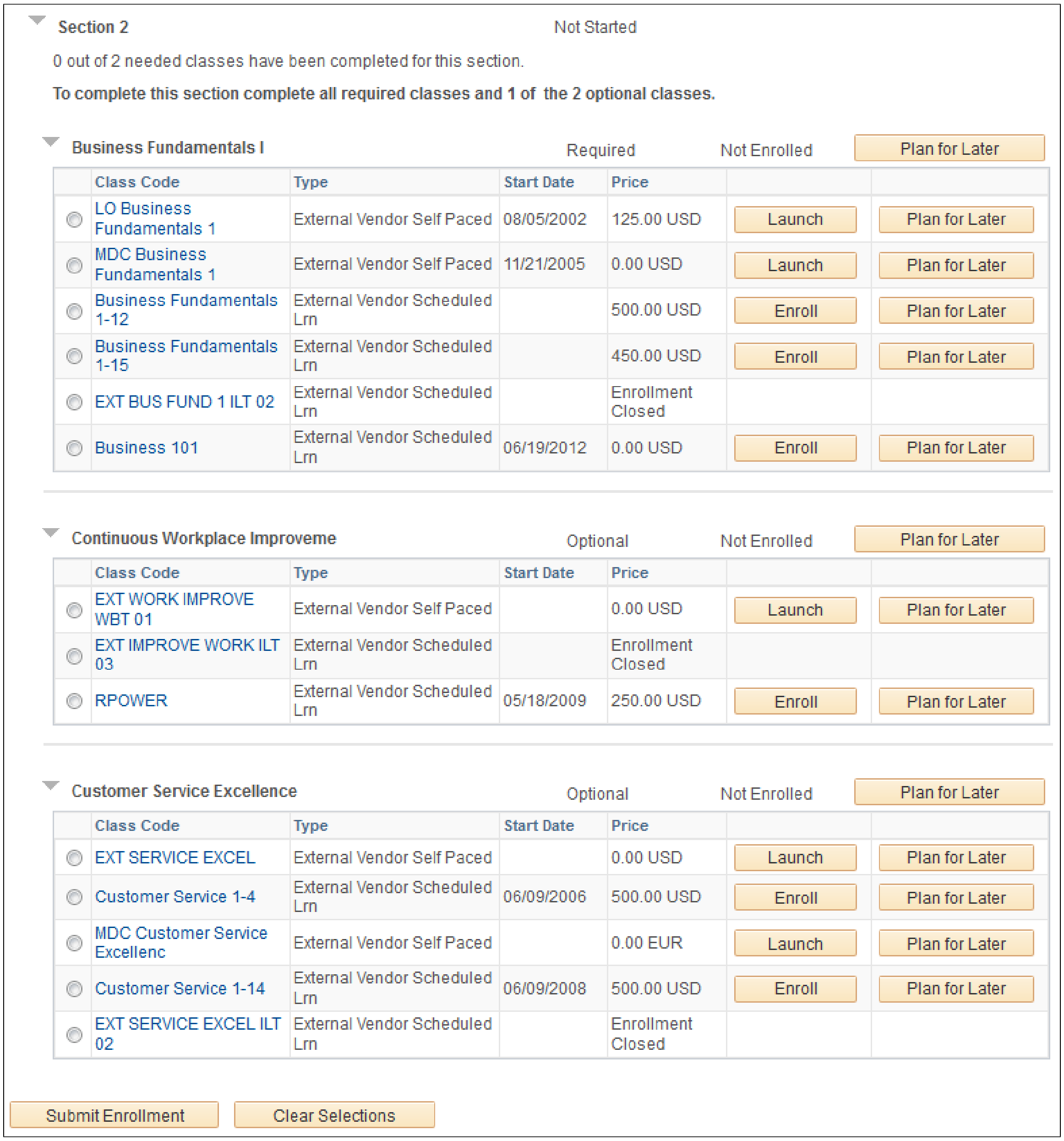
This example illustrates the fields and controls on the Program Progress page.



This example illustrates the fields and controls on the Program Progress page.



This example illustrates the fields and controls on the Program Progress page.



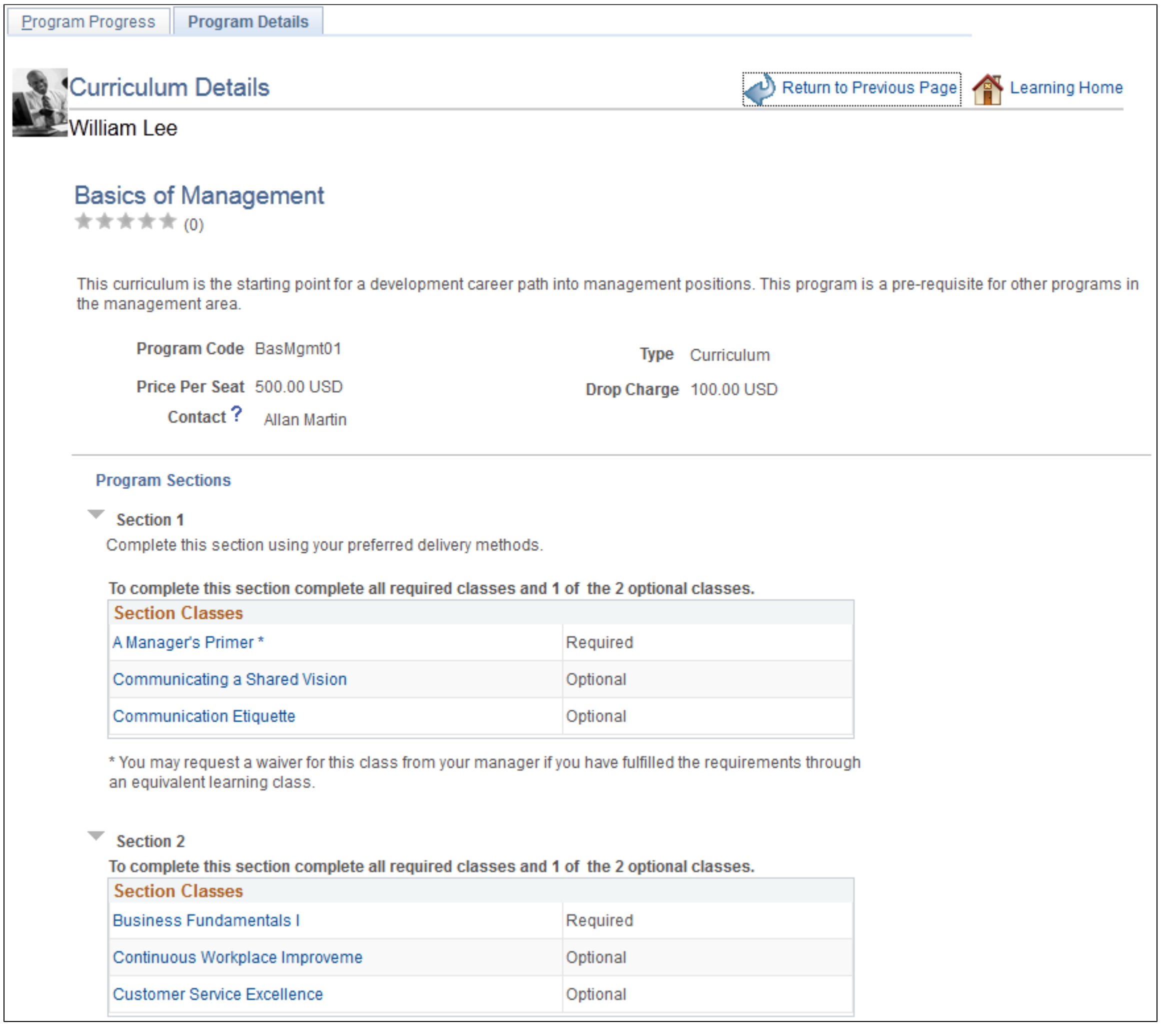
Field or Control	*Description*
Drop Registration	Click to access the Drop <Program> page where you can drop the program registration.
Plan for Later	Click to access the Select Learning Plans Page where you can add the course or class to one of your learning plans. **Note:** Adding a course or course to your learning plan does not enroll you in it.

Field or Control	***Description***
Enroll	Click to access the Review Information Page where you can submit your enrollment.
Launch	Click to launch a class and enroll in it simultaneously.
Submit Enrollment	This page enables you to enroll in multiple classes in one process. For each course, you can select one class in which to enroll. Once you have selected all of the classes in which you want to enroll, click the **Submit Enrollment** button. This enrolls you in the selected classes and accesses the Enrollment Confirmation page where you can see the results of your enrollment.
Clear Selections	Click to clear all of the options that you have selected for enrollment.

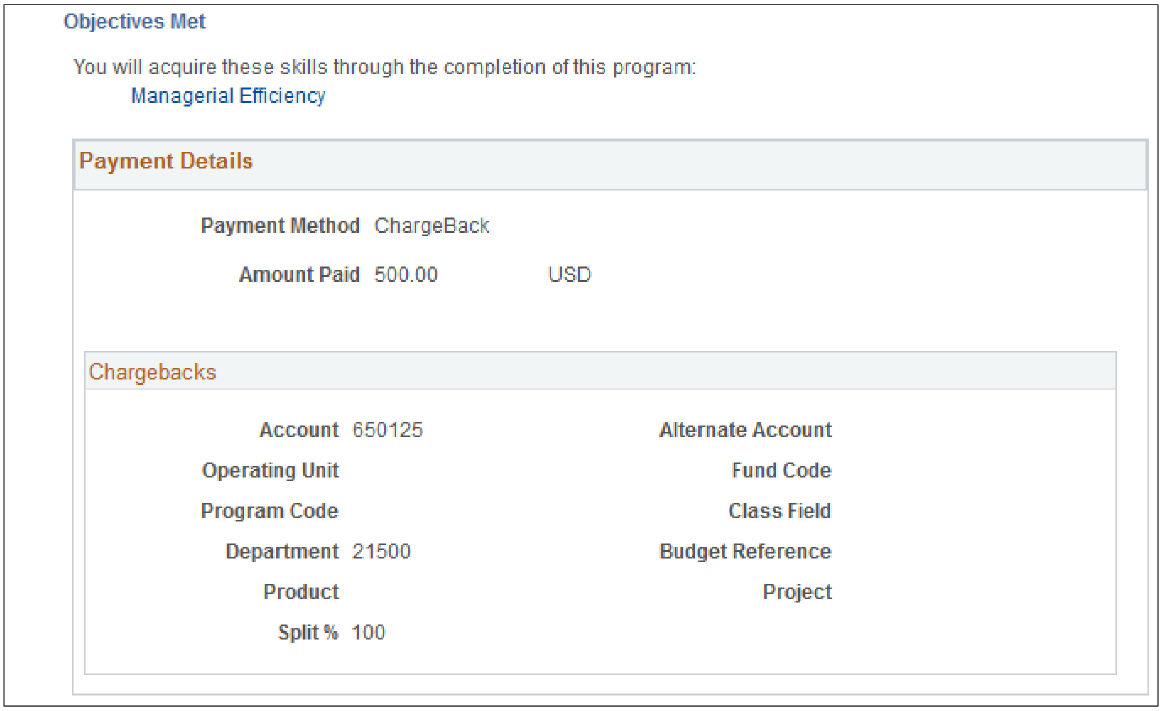
Program Details Page

Use the Program Details page (LM_PRG_DTL_PG_SS) to review the completion details, program objectives, and payment details for a program.

This example illustrates the fields and controls on the Program Details page.



This example illustrates the fields and controls on the Program Details page.



Program Sections

Field or Control	***Description***
Section Classes	Click a link in this column to access the Course Details Page for a class.

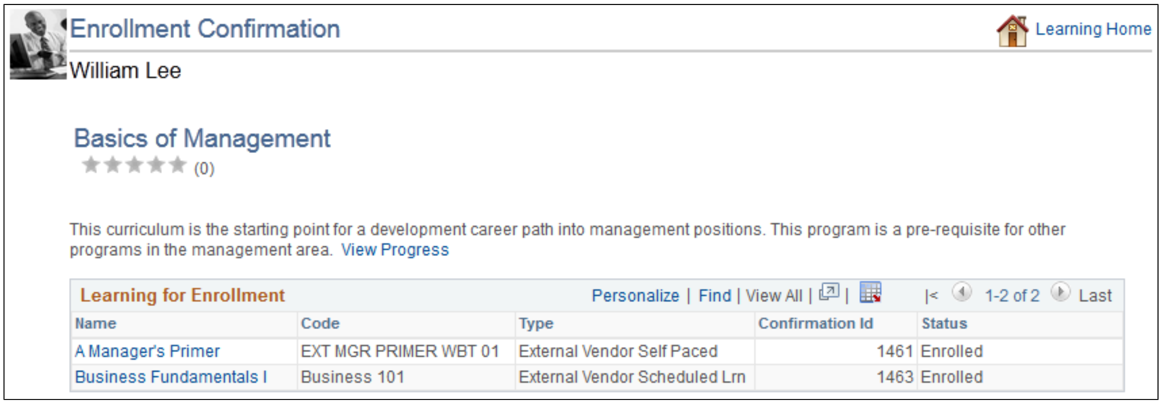
Objectives Met

This section of the page lists the objectives that the program satisfies. You can click an objective to access the Objectives Detail page where you can view detailed information about the objective.

Enrollment Confirmation Page

Use the Enrollment Confirmation page (LM_CONF_PROG_SS) to view a confirmation for multiple learning object enrollment.

This example illustrates the fields and controls on the Enrollment Confirmation page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
View Progress	Click to access the Program Progress Page.
Name	Click a link in this column to view the Course Details Modal Page for the class.

Maintaining Learning Records and Objectives Using Manager Self Service

Pages Used to Maintaining Learning Records and Objectives Using Manager Self Service

Page Name	***Definition Name***	***Usage***
Team Members Page	LM_MANAGER_HM	View team members.
Team Learning Page	LM_MGR_GRP_CURNT	Review learning for team members. (FRA) Manager views DIF and DIF in Advance balance for a specific learner.
Team Certification Status Page	LM_MGR_CERT_STATUS	Review certification status for team members.

Page Name	***Definition Name***	***Usage***
Team Member Certification Status Page	LM_TM_CERT_STTS	Managers can view current and expired certifications for a specific learner. For each certification, managers can view certification name, current status, expiration date, recertification date, and history. Managers also have the option to register a team member for a recertification program.
Certification Status - Certification History Page	LM_MGR_CERT_HIST	Managers can view a learner's certification and recertification history for a specific certification program.
Certification Status - Available Recertifications Page	LM_MGR_RECERT	Managers can view the available recertification programs for a particular certification and can register learners for a recertification program.
Team Learning Objectives - Current Objectives page	LM_OBJV_MTM	Review current learning objectives for team members.
Team Member Objectives Page	LM_OBJV_MGR	Manager views current learning objectives for specific team members, sees who assigned an objective, adds and deletes objectives, identifies required objectives, and searches for classes that satisfy learning objectives.
Add New Objective Page	LM_OBJV_ADD_OBJV	Manager searches for, selects, and adds new objectives to learners' records. If a rating model is associated with the objective, the manager must specify a proficiency level for the objective. The manager can also add a target completion date and select a Required indicator.
Team Learning Objectives - Objectives History page	LM_OBJV_MTM_HIST	Review completed learning objectives for team members.
Maintain Objectives - Delete Confirmation Page	EO_DEL_CONFIRM	Manager confirms deletion of an objective.
View Objective Detail Page	LM_OBJV_DTL	Manager views details of a learner's objectives, including the proficiency level, status, target completion date, and who assigned the objective.
Add Supplemental Learning Page	LM_ADHC_MGR_HM	Select the team members for which you want to add supplemental learning.

Page Name	***Definition Name***	***Usage***
Add Supplemental Learning Page	LM_SEL_ADHC_TYP_SS	Select the category of supplemental learning (external learning, equivalent experience, on-the-job training, and so on) that you want to assign to team members.
Add Supplemental Learning Page	LM_ADHC_LRN_PG_SS	Define the details of a specific supplemental class. This class complements or replaces learning offered in the catalog. Managers and administrators have the ability to modify supplemental learning even if it has a status of *Completed*.
Add Objective to Get Credit For Page	LM_ADHC_OBJ_PG	Managers add objectives for which their team members should receive credit when they complete their supplemental learning.
Class Progress Page	LM_ACT_PROG	Managers review details of a learner's classes, including the class syllabus and all class components, schedules, grade and attendance records, notes and attachments, as well as approval and payment details. Managers can also drop team members from classes.
<Program> Progress Page	LM_PRG_PROGRESS	Managers review learners' progress toward completion of the classes within each section of the program; they enroll and register learners in classes for the curriculum program, and review program objectives, completion rules, notes, and registration details. Managers can also drop learners from a program.
Course Details Page	LM_SS_ITM_DTL	Managers use this page to review details of planned classes. Managers can also add classes to a plan, or delete, drop, and enroll team members in classes. Available actions depend on business rules, add and drop deadlines, delivery method, and so on.
Class Progress - Assignment Progress Page	LM_LC_ASGN_PROG_SS	Manager updates the completion status for an assignment (if permitted) and enters notes about the assignment.

Page Name	***Definition Name***	***Usage***
Class Progress - Webcast Progress Page	LM_LC_LWC_PROG_SS	Manager reviews a learner's grade, score, attendance record, and progress on a live webcast.
Class Progress - Recorded Webcast Progress Page	LM_LC_WEB_PROG_SS	Manager reviews a learner's grade, score, attendance record, and progress on a recorded webcast.
Class Progress - Web-based Progress Page	LM_LC_WEB_PROG_SS	Manager reviews a learner's grade, score, attendance record, and progress on a web-based course.
Class Progress - Test Progress Page	LM_LC_WEB_PROG_SS	Manager reviews a learner's grade, score, attendance record, and progress on a test.
Class Progress - Survey Progress Page	LM_LC_WEB_PROG_SS	Manager reviews a learner's grade, score, attendance record, and progress on a survey.
Class Progress - Sessions Progress Page	LM_LC_SES_PROG_SS	Manager reviews a learner's grade, score, attendance record, and progress for a session.
Instructors Page	LM_INSTR_DTL	Manager views instructor information.
Class Details Page	LM_SS_ACT_DTL	Managers review details of a class, including the class syllabus and components, the class schedule, related objectives, and notes and attachments. Managers can enroll learners in a class, or add classes to a team member's learning plan.
Program Details Page	LM_PRG_SUMM_PG_SS	Managers view details about a program, including its description, sections and classes, objectives met, prerequisites, notes, and attachments. Also, managers can register team members for a program or add programs to a plan.
View Objective Detail Page	LM_OBJV_DTL	Managers use this page to review descriptions of objectives and find learning related to an objective.
Enroll in Class Page	LM_REV_ENRLMT_TEAM	Manager enrolls team members in courses.

Page Name	***Definition Name***	***Usage***
Drop Class Page	LM_DP_REVW_ENRLMT	Manager drops a team member's enrollment in classes.
Drop Class Page	LM_DP_REVW_ENRL_SS	Manager drops a team member's enrollment in classes.
Drop Class - Drop Confirmation Page	LM_DP_CONF_ENRLMT	Manager receives confirmation that a learner has been dropped from a class.
Review Information Page	LM_REVIEW_REG_SS	Manager registers a learner for a program.
Registration Confirmation Page	LM_CONF_REG_SS	Manager confirms that a learner is registered for a curriculum program.
Drop <Program> Page	LM_DP_REVW_REG_SS	Manager drops a team member's curriculum enrollment.
Drop Confirmation Page	LM_DP_CONF_REG_SS	Manager receives confirmation that a team member has been dropped from a program.
Team Members Page	LM_TEAM_LEARNER	Managers select learners they want to enroll or register in classes or programs.
Comments Page	LM_ACT_PROG_NOTES	Managers use this page to review instructor comments on learners' class records.
Request Learning Page	LM_SS_LRN_REQ	• Manager requests a new class for an existing course in the catalog (for situations where there is an existing course but the course is full, is not scheduled at the right times, is in the wrong language, or does not otherwise meet the learner's needs). • Manager requests a new course not found in the catalog. In either case, the manager can enter preferences for delivery method, meeting days and times, language of instruction, and other parameters depending on your configuration, to enable the learning administrator to create and schedule the appropriate class.

Page Name	***Definition Name***	***Usage***
Request Learning Page	LM_SS_LRQ_LRNRS	Managers select specific learners for a class, or reserve seats in a class if they are unsure who will attend the requested class.
Request Learning Page	LM_SS_LRN_REQ_CONF	Manager confirms submission of a learning request.
Learning Approvals Page	LM_MGR_APPR_RESULT	Manager approves enrollment request.
Learning Approvals - Deny Enrollment Page	LM_MGR_DEC_RESULT	Manager indicates that he/she wants to deny an enrollment request.
Learning Approvals Page	LM_DEC_TRN_RESULT	Manager denies enrollment request and confirms that the request has been denied.
Enrollment Details Page	LM_APPRVL_DTLS_SS	Manager views detailed information related to the class or program prior to denying or approving a learning request.
Member Information Page	LM_USER_PROF_POP	Manager reviews profiles of individuals or sources that added objectives or classes to learners' records.
Assignee Information Page	LM_USER_PROF_POP	

Manager Self-Service Actions

Using self-service pages, managers can accomplish the following actions:

Note: This list presents some of the more common manager actions; it does not include all possible manager actions.

- View their team's class, curriculum, and certification progress.
- Approve or deny learning requests and supplemental learning for a team member.
- Enroll or register team members in classes and programs, and add classes to a plan.

  Note: (FRA) If your system is configured to enable DIF tracking, you can request the use of DIF hour when entering an enrollment request for a team member.

- Drop classes or programs for team members and remove classes and programs from a plan.
- Review certification status of team members and enroll learners in recertification programs when current certification is expired.

- Add objectives to a team member's learning plan and search for learning that satisfies the objectives.
- Request or add supplemental learning.
- Request new learning when the appropriate learning cannot be found or does not exist in the catalog.
- (FRA) View DIF and DIF in Advance balances and apply DIF hours towards training.

The following sections describe the steps a manager can take to accomplish some of the more common self-service actions.

Note: There are typically several ways to accomplish the same action on the self-service pages. The steps outlined here illustrate one possible way to accomplish these actions.

Approving or Denying Learning Requests for a Team Member

To approve a learning request:

1. Select Manager Self-Service, Team Learning, Team Members.

   The Team Members page appears.

2. On the Team Members page, review the pending approvals in the Pending Approvals group box.
3. Select the learner whose request you want to approve and click the**Approve** button.

   The Learning Approvals page appears. Review the status of the approval on this page.

To deny a learning request:

1. Select Manager Self-Service, Team Learning, Team Members.

   The Team Members page appears.

2. On the Team Members page, review the pending approvals in the Pending Approvals group box.
3. Select the learner whose request you want to deny and click the**Deny** button.

   The Learning Approvals - Deny Enrollment page appears.

4. Click the **Continue** button On the Learning Approvals - Deny Enrollment page to confirm that you want to deny the learning request.

   The Learning Approvals page appears.

5. On the Learning Approvals page, verify that the status of the learning request is *Denied.*

See Team Members Page

Enrolling in and Dropping Classes for Team Members

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To enroll team members:

1. Select Manager Self-Service, Team Learning, Team Members.

The Team Members page appears.

2. On the Team Members page, select the learners that you want to enroll in a class from the list of direct reports in the **Team Members** group box.

3. Select *Enroll* in the **Group Actions** field at the bottom of the page and click the **Go** button.

   The Find Learning page appears.

4. On the Find Learning page, search for a class in which to enroll the selected learners.

5. Click the **Enroll Now** button for the desired class.

   The Enroll in Class page appears.

   (FRA) If you have enabled DIF tracking, you can select the **Apply Class Toward DIF** check box on the Enroll in Class page to use DIF balance hours when you enroll a learner in training.

6. Click the **Submit Enrollment** button on the Enroll in Class page to enroll the selected learners.

   The Enrollment Confirmation page appears. Review the enrollment status of the selected learners on this page.

To drop a team member from a class:

1. Select Manager Self-Service, Team Learning, Team Learning.

   The Team Learning page appears.

2. On the Team Learning page, click the **Drop** button for the learner and class you want to drop.

   The Drop Class page appears.

3. Click the **Drop** button on the Drop Class page to drop the learner from the class.

   The Drop Class page appears. Review the learners' enrollment status on this page.

4. Click the **Return to Previous Page** link on the Drop Class - Drop Confirmation page.

   The Team Learning page appears

5. Review the learner's enrollment status on the Team Learning page.

See Team Learning Page and Find Learning Page.

Registering for and Dropping Curriculum Programs for Team Members

To register team members:

1. Select Manager Self-Service, Team Learning, Team Members.

   The Team Members page appears.

2. On the Team Members page, select the learners that you want to enroll in a curriculum program from the list of direct reports in the **Team Members** group box.

3. Select *Register* in the **Group Actions** field at the bottom of the page and click the **Go** button.

The Find Learning page appears.

4. Click the **Advanced Search** link on the Find Learning page.

   The Find Learning - Advanced Search page appears.

5. On the Find Learning - Advanced Search page, enter *Curriculum* in the **Type** field and click the **Search** button.

6. Review the search results and click the **Register** link for the desired curriculum program.

   The Register for Curriculum page appears.

7. Click the **Submit Registration** button on the Register for Curriculum page to register the selected learners for the program.

   The Register for Curriculum page appears. Review the registration status of the selected learners on this page.

To drop a curriculum program for a team member:

1. Select Manager Self-Service, Team Learning, Team Learning.

   The Team Learning page appears.

2. On the Team Learning page, click the **Drop** button next to the curriculum program and learner you want to drop.

   The Drop Curriculum page appears.

3. Click the **Drop** button on the Drop Curriculum page to drop the learner from the program.

   The Drop Confirmation page appears. Review the learner's registration status on this page.

See Team Learning Page and Find Learning Page.

Registering for and Dropping Certification Programs for Team Members

To register team members:

1. Select Manager Self-Service, Team Learning, Team Members.

   The Team Members page appears.

2. On the Team Members page, select the learners that you want to enroll in a certification program from the list of direct reports in the **Team Members** group box.

3. Select *Register* in the **Group Actions** field at the bottom of the page and click the **Go** button.

   The Find Learning page appears.

4. Click the **Advanced Search** link on the Find Learning page.

   The Find Learning - Advanced Search page appears.

5. On the Find Learning - Advanced Search page, enter *Certification* in the **Type** field and click the **Search** button.

6. Review the search results and click the **Register** link for the desired certification program.

   The Register for Certification page appears.

7. Click the **Submit Registration** button on the Register for Certification page to register the selected learners for the program.

   The Register for Certification page appears. Review the registration status of the selected learners on this page.

To drop a certification program for a team member:

1. Select Manager Self-Service, Team Learning, Team Learning.

   The Team Learning page appears.

2. On the Team Learning page, click the **Drop** button next to the certification program and learner you want to drop.

   The Drop Certification page appears.

3. Click the **Drop** button on the Drop Certification page to drop the learner from the program.

   The Drop Confirmation page appears. Review the learner's registration status on this page.

See Team Learning Page and Find Learning Page.

Adding Objectives to a Learning Plan and Searching for Learning That Satisfies an Objective

To add objectives to a learning plan for a group of learners and search for learning that satisfies an objective:

1. Select Manager Self-Service, Team Learning, Team Members.

   The Team Members page appears.

2. On the Team Members page, select the learners for whom you want to define an objective from the list of direct reports in the **Team Members** group box.

3. Select *Add Objective* in the **Group Actions** field at the bottom of the page and click the **Go**button.

   The Add New Objective page appears

4. Click the **Search** button on the Add New Objective page.

   The search results appear.

5. On the search results page, select the objective you want to add to the selected learners' learning plans, enter the target completion date, indicate whether the objective is required, and click the **Add** button.

   The Team Learning Objectives - Current Objectives page appears.

6. Click the Save button on the Team Learning Objectives - Current Objectives page to save the objective.

7. For any one of the learners selected in step 2, click the **Find Learning** link on the Team Learning Objectives - Current Objectives page .

   The Find Learning page appears, displaying classes that satisfy the specified objective.

8. On the Find Learning page, click the **Enroll Now** link to enroll the learner selected in the previous step in a class that meets the desired objective.

   The Enroll in Class page appears.

9. Click the **Submit Enrollment** button on the Enroll in Class page to enroll the learner in the class.

   The Enrollment Confirmation page appears. Confirm that the learner is enrolled in the class.

See Find Learning Page.

Requesting or Adding Supplemental Learning

To request or add supplemental learning:

1. Select Manager Self-Service, Team Learning, Supplemental Learning.

   The Add Supplemental Learning page appears.

2. On the Add Supplemental Learning page, click the **Add** button for the learner for whom you want to create supplemental learning.

   The Supplemental Learning page appears.

3. On the Add Supplemental Learning page, select the type of supplemental learning (for example, equivalent experience, external learning, or on-the-job training) that you want the learner to receive credit for, and click the **Add Supplemental Learning** button.

   Note: Define the supplemental learning types used by your organization on the Define Supplemental Learning - Details page.

   A second Add Supplemental Learning page appears on which you can enter detailed information about the supplemental learning.

4. Enter the requested information and select one of the following statuses: In Progress, Planned, or Submit for Approval.

5. If applicable, click the **Add Program** button or **Add Class** button to define the program or class that you want to receive credit for when you complete the supplemental learning.

   The Find Learning page appears.

6. Enter any additional search criteria to help find the program or class that you want to receive credit for and click **Search**.

7. Click the **Select** button for the program or class that you want to receive credit for.

   The Add Supplemental Learning page appears.

Note: If you want to receive credit for objectives, select the **Add Objective** button on the Add Supplemental Learning page and add an objective in the same way you previously added a program or class. When you do this, the system enables you to search for an objective to associate with the supplemental learning.

8. Click the Save button on the Supplemental Learning page.

Note: Not all supplemental learning provides credit towards the completion of programs, classes, and objectives–the type and scope of credit that can be granted must be defined during setup of the different types of supplemental learning.

See Setting Up Supplemental Learning Types.

See Adding and Editing Supplemental Learning

Requesting New Learning for Team Members (if existing learning does not meet needs or learning does not exist in the catalog)

To request new learning for team members:

1. Select Manager Self-Service, Team Learning, Team Members.

   The Team Members page appears.

2. Click the **Request New Learning** link on the Team Members page.

   The Request Learning page appears.

3. On the Request Learning page, indicate whether you are:

   a. Requesting a class for an existing course that does not meet the needs of your team members (for example, existing course classes are in the wrong language, are delivered in the wrong locations or formats, or are not currently offered).

   b. Requesting an entirely new course for which there are no classes in the catalog.

4. If you are requesting a class for an existing course that does not meet the needs of your team members (option 1), click the **Search** button on the Request Learning page to search for the course.

   The Find Learning page appears.

5. Review the list of courses in the search results on the Find Learning page and click **Select** next to the course for which you are requesting a new class.

   This returns you to the Request Learning page.

6. If you are requesting an entirely new course for which there are no classes in the catalog (option 2), specify the learning category and the proposed title of the course in the **Category** and **Title** fields on the Request Learning page.

7. After selecting option 1 or 2, define the learners' learning preferences on the Request Learning page (such as best days or times for learning, preferred delivery method or language, preferred location) and click the **Continue** button.

The Request Learning page appears.

8. On the Request Learning page, select the team members for whom you are making the learning request—or reserve seats in a class if you are unsure who will attend the requested class—and click the **Submit Request** button.

   The Request Learning page appears. Review the information on this page to confirm that your request was submitted successfully.

Note: The learning administrator automatically receives notification when the number of learning requests for a particular course meets the learning request threshold defined on the Install Defaults - Enrollment page.

See Request Learning Page.

Creating and Updating Learning Plans for Team Members

To create a new learning plan for a team member:

1. Select Manager Self Service, Team Learning, Team Learning Plans.

   The Team Learning Plans - Current Learning Plans page appears.

2. Click the **Update Learning Plans** button.

   The Team Learning Plans page appears.

3. Select the check box next to learners for whom you want to create a new learning plan.

4. Click the **Create New Learning Plan** button.

   The **Add Learning Plan to Learner** group box appears.

5. Click the **Create** button.

6. Enter a title for the new learning plan and click the **OK** button.

   The Team Learning Plans page appears.

7. Click **Save** on the Team Learning Plans page.

To add a class to a team member's learning plan:

1. Select Manager Self Service, Team Learning, Team Learning Plans.

   The Team Learning Plans - Current Learning Plans page appears.

2. Click the **Update Learning Plans** link.

   The Team Learning Plans page appears.

3. Select the check box next to learner whose learning plan you want to update.

4. Click the **Add New Learning to Plan** button.

   The Find Learning page appears.

5. Click the **Search Classes** button.

   The Find Learning page appears with a list of courses and classes.

6. Click the **Select** button next to the course or class that you want to add.

   The Select Learning Plans page appears.

7. Select the check box next to the learning plan to which you want to add the class.

8. Click **OK** on the Select Learning Plans page.

See Managing Team Learning Plans.

(FRA) Viewing DIF and DIF in Advance Balances

To view DIF and DIF in Advance balances:

1. Select Manager Self-Service, Team Learning, Team Members.

   The Team Members page appears.

2. On the Team Members page, select the learner whose DIF and DIF in Advance balance hours you want to view, select *Go To Team Learning,* and click the Go button.

   The Team Learning page appears.

3. On the Team Learning page, view the learner's DIF and DIF in Advance balance hours.

Manager Self-Service Prerequisites

Before managers can access their team learning plans and learning plan history records, the relationship between managers and team members must be defined in the system. These relationships are defined by importing employee and manager relationship data from an external human resources system through Enterprise Integration Points (EIPs), specifying the Manager Access Type on the Install Default - General page, and running the Load Manager Data process.

See Understanding Person and Organization EIPs.

Team Members Page

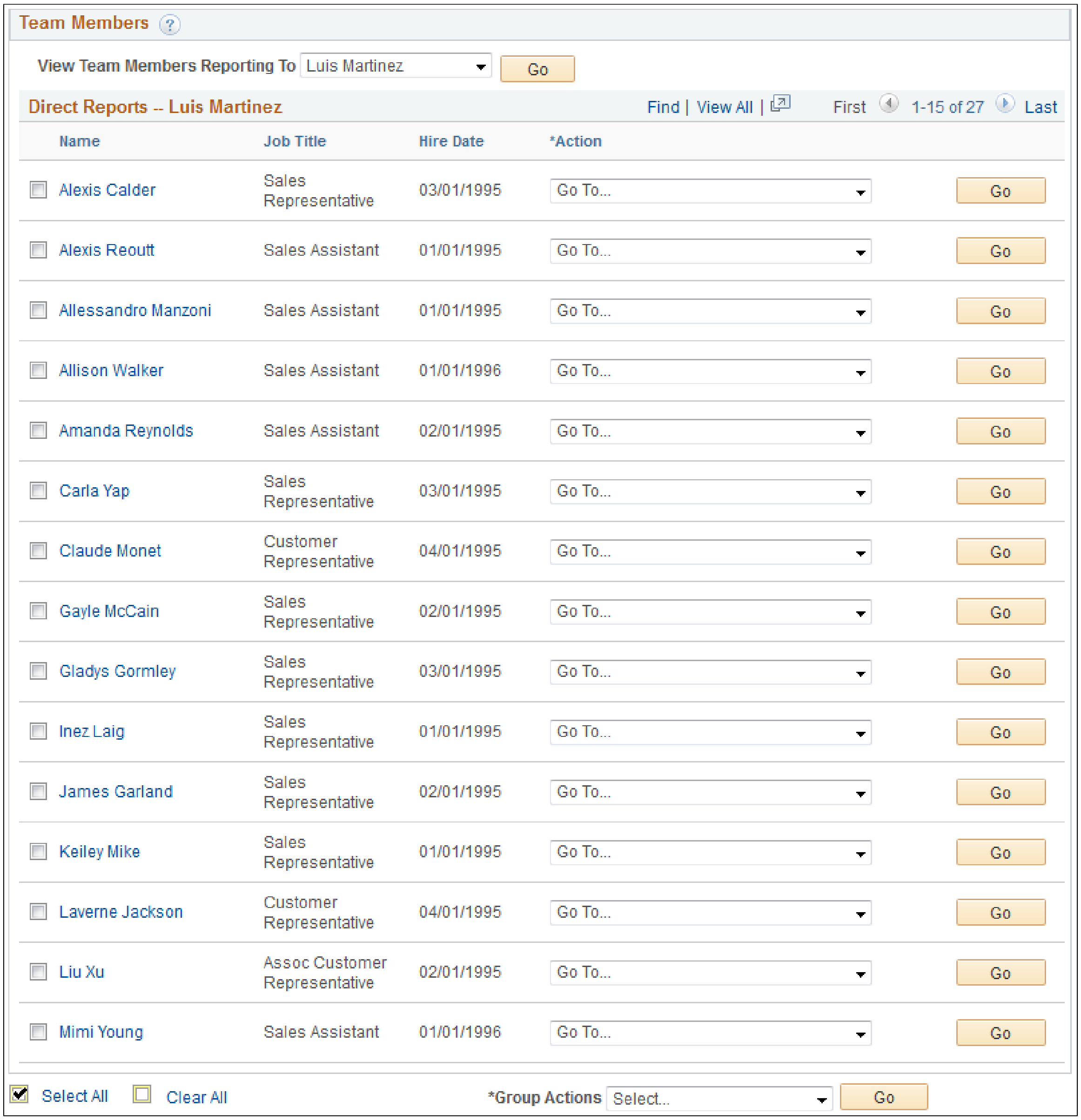
Use the Team Members page (LM_MANAGER_HM) to view team members.

Navigation:

- **Manager Self Service** > **Team Learning** > **Team Members**
- Click the **Team Members** link on the Team Learning page.
- Click the **Team Members** link in the Manager Quick Links pagelet of the Learning Home.

This example illustrates the fields and controls on the Team Members page (1 of 2).

This example illustrates the fields and controls on the Team Members page (2 of 2).



Name	Job Title	Hire Date	*Action	
Alexis Calder	Sales Representative	03/01/1995	Go To...	Go
Alexis Reoutt	Sales Assistant	01/01/1995	Go To...	Go
Allessandro Manzoni	Sales Assistant	01/01/1995	Go To...	Go
Allison Walker	Sales Assistant	01/01/1996	Go To...	Go
Amanda Reynolds	Sales Assistant	02/01/1995	Go To...	Go
Carla Yap	Sales Representative	03/01/1995	Go To...	Go
Claude Monet	Customer Representative	04/01/1995	Go To...	Go
Gayle McCain	Sales Representative	02/01/1995	Go To...	Go
Gladys Gormley	Sales Representative	03/01/1995	Go To...	Go
Inez Laig	Sales Representative	01/01/1995	Go To...	Go
James Garland	Sales Representative	02/01/1995	Go To...	Go
Keiley Mike	Sales Representative	01/01/1995	Go To...	Go
Laverne Jackson	Customer Representative	04/01/1995	Go To...	Go
Liu Xu	Assoc Customer Representative	02/01/1995	Go To...	Go
Mimi Young	Sales Assistant	01/01/1996	Go To...	Go

Managers can use this page to review a list of all team members, oversee team learning, approve or deny learning requests, and access other self-service pages used to manage team learning.

Pending Approvals

This grid displays team members who have learning items that require approval. You can approve or deny these pending items.

Team Members

This grid lists all of your direct reports.

Field or Control	***Description***
Action	Select a manager self service action and click the **Go** button to access the page that enables you to perform it. Values are: • *Certification Status* • *Learning Objectives* • *Learning Plans* • *Supplemental Learning* • *Team Learning*
Group Action	When you select multiple learners, you can perform a manager self-service action for all of them by selecting a value in the **Group Action** field and clicking the **Go** button. Values are: • *Add Objective* • *Add Supplemental Learning* • *Add to Plan* • *Enroll* • *Register*

Team Learning Page

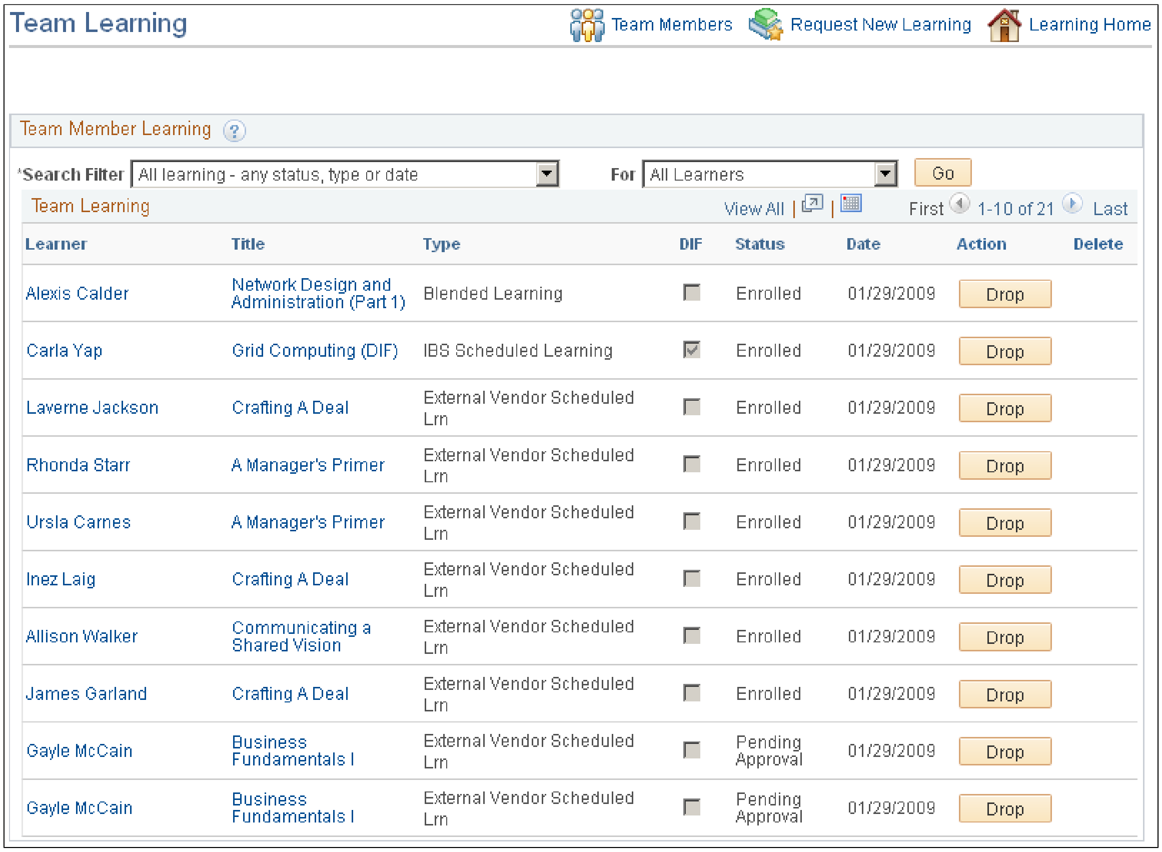
Use the Team Learning page (LM_MGR_GRP_CURNT) to review learning for team members.

(FRA) Manager views DIF and DIF in Advance balance for a specific learner.

Navigation:

- Select *Go To Team Learning* on the Team Members page for a specific learner.
- **Manager Self Service** > **Update Team Learning** > **Team Learning**
- Click the **Team Learning** link on the Team Members page.

This example illustrates the fields and controls on the Team Learning page.



Learner	Title	Type	DIF	Status	Date	Action	Delete
Alexis Calder	Network Design and Administration (Part 1)	Blended Learning		Enrolled	01/29/2009	Drop	
Carla Yap	Grid Computing (DIF)	IBS Scheduled Learning	✓	Enrolled	01/29/2009	Drop	
Laverne Jackson	Crafting A Deal	External Vendor Scheduled Lrn		Enrolled	01/29/2009	Drop	
Rhonda Starr	A Manager's Primer	External Vendor Scheduled Lrn		Enrolled	01/29/2009	Drop	
Ursla Carnes	A Manager's Primer	External Vendor Scheduled Lrn		Enrolled	01/29/2009	Drop	
Inez Laig	Crafting A Deal	External Vendor Scheduled Lrn		Enrolled	01/29/2009	Drop	
Allison Walker	Communicating a Shared Vision	External Vendor Scheduled Lrn		Enrolled	01/29/2009	Drop	
James Garland	Crafting A Deal	External Vendor Scheduled Lrn		Enrolled	01/29/2009	Drop	
Gayle McCain	Business Fundamentals I	External Vendor Scheduled Lrn		Pending Approval	01/29/2009	Drop	
Gayle McCain	Business Fundamentals I	External Vendor Scheduled Lrn		Pending Approval	01/29/2009	Drop	

Managers can use this page to view a list of classes that their team members are enrolled in and curricula and certifications for which they are registered. Managers can view the details, progress status, and schedules for their learning by clicking on the name of the class or program. They can also enroll and drop team members from classes and programs, or modify learning requests.

(FRA) When you filter for French learners, this page includes a DIF Balance group box that displays their DIF balances, DIF in advance balances, and planned DIF hours.

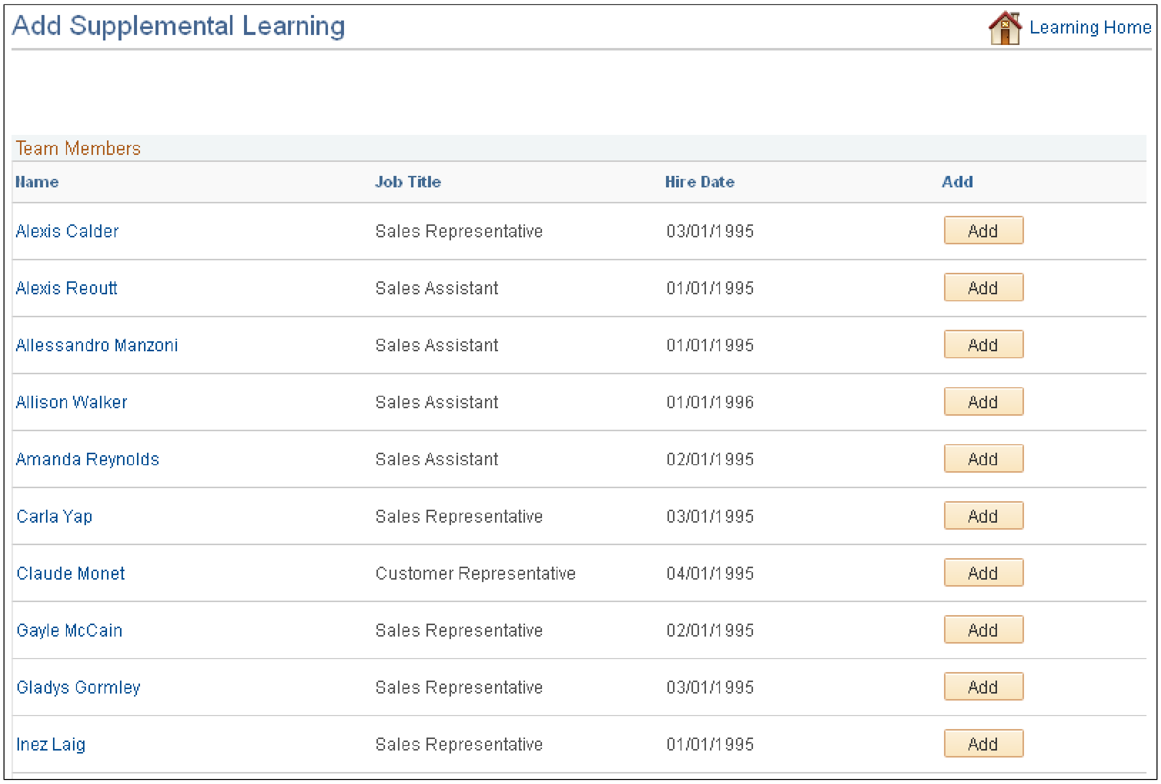
Add Supplemental Learning Page

Use the Add Supplemental Learning page (LM_ADHC_MGR_HM) to select the team members for which you want to add supplemental learning.

Navigation:

Manager Self Service > **Team Learning** > **Supplemental Learning**

This example illustrates the fields and controls on the Supplemental Learning page.

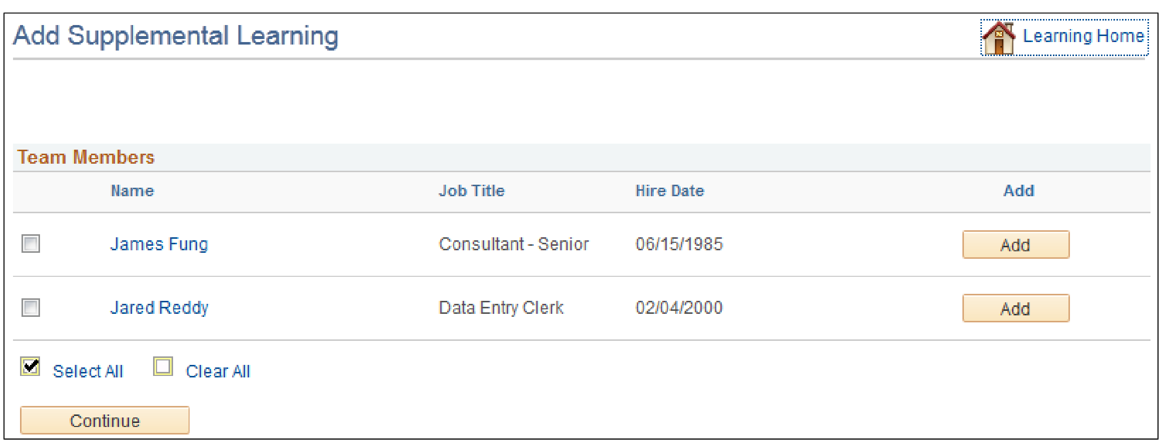


Managers can use this page to add supplemental learning for team members.

Adding Supplemental Learning for Multiple Learners

If you select the Supplemental Group Enrollment check box on the Install Defaults – Enrollment Page, you can select multiple learners for adding supplemental learning on this page.

This is an example of what the Add Supplemental Learning page looks like when supplemental group enrollment is enabled.



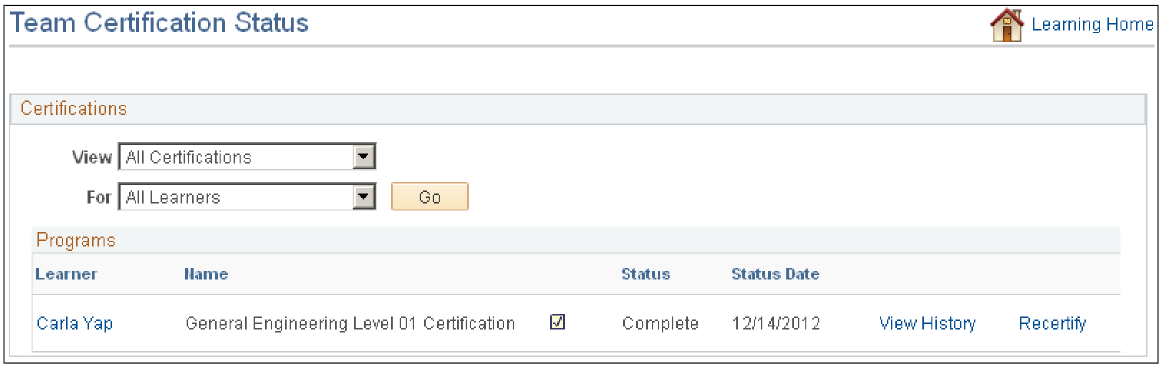
Team Certification Status Page

Use the Team Certification Status page (LM_MGR_CERT_STATUS) to review certification status for team members.

Navigation:

- **Manager Self Service** > **Team Learning** > **Certification Status**
- Click the **Team Certifications** link in the Manager Quick Links pagelet of the Learning Home.

This example illustrates the fields and controls on the Team Certification Status page.



Managers can use this page to review current and expired certifications for their entire teams within a specified date range. For each certification, managers can view certification name, current status, expiration date, recertification date, and history. Managers also have the option to register a team member for a recertification program.

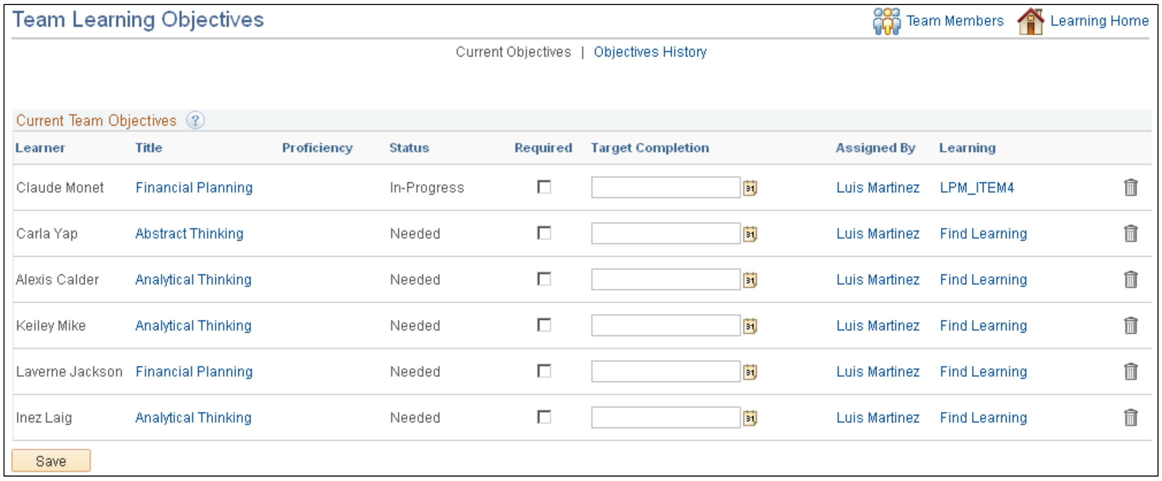
Team Learning Objectives - Current Objectives page

Use the Team Learning Objectives - Current Objectives page (LM_OBJV_MTM) to review current learning objectives for team members.

Navigation:

- **Manager Self Service** > **Team Learning** > **Team Learning Objectives**
- Click the **Current Objectives** link on the Team Objectives - Objectives History page.
- Click the **Team Objectives** link in the Manager Quick Links pagelet of the Learning Home.

This example illustrates the fields and controls on the Team Learning Objectives - Current Objectives page.



Managers can use this page to view current learning objectives for their entire teams, see who assigned an objective, delete objectives, and search for classes that satisfy learning objectives. (The Assigned By field identifies the source of the assignment, which can be a person or a system.)

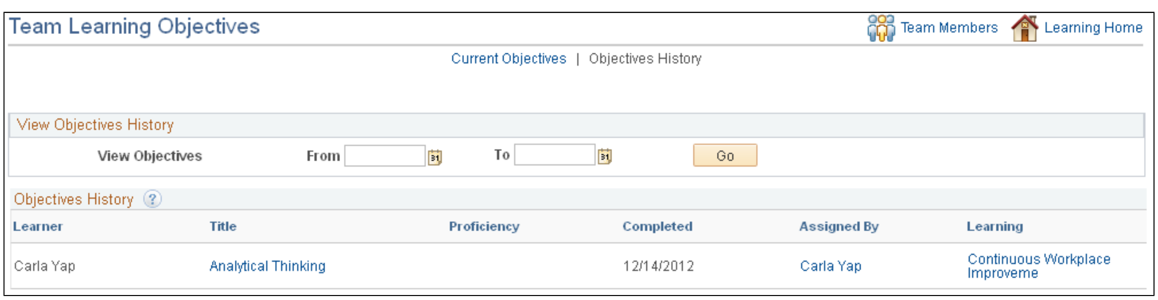
Team Learning Objectives - Objectives History page

Use the Team Learning Objectives - Objectives History page (LM_OBJV_MTM_HIST) to review completed learning objectives for team members.

Navigation:

Click the **Objectives History** link on the Team Learning Objectives - Current Objectives page.

This example illustrates the fields and controls on the Team Learning Objectives - Objectives History page.



Managers can use this page to view the record of a learner's completed objectives within a specified date range.

Chapter 35

Using the PeopleSoft Fluid User Interface for Learning Self-Service

Understanding Delivered Fluid Pages

This topic provides a list of Fluid pages delivered for PeopleSoft Enterprise Learning Management.

Enterprise Learning Management Fluid Pages

This table lists delivered Fluid pages for PeopleSoft Enterprise Learning Management:

Fluid Page	***Classic Page (Replaced or Counterpart)***	***Image Delivered***	***Comments***
	Team Learning Pagelet	Image 6	
Learning Compliance Tile	Learning Compliance Pagelet	Image 6	
Announcements Page		Image 11	
<Compliant Content> Page		Image 13	
Pending Approvals - Class Enrollment Page		Image 15	
Pending Approvals - Program Registration Page		Image 15	
Pending Approvals - Supplemental Learning Page		Image 15	
Learning Instructor Home Page		Image 15	
Talent Administrator Home Page		Image 15	
Find Learning Page	Find Learning Page	Image 16	

Fluid Page	***Classic Page (Replaced or Counterpart)***	***Image Delivered***	***Comments***
My Learning Page: Current Tab		Image 16	
New User Registration Page		Image 16	
	Add Supplemental Learning Page	Image 18	
Fluid Learning Instructor Pages as seen on Smartphones			
My Classes Page		Image 21	
Setup Filters Page		Image 21	
Add Filter Page		Image 21	
Class Summary Page		Image 21	
Mark Grade Page (Mark Grade page in the Class flow for all learners.)		Image 21	
Class Roster Page		Image 21	
Mark Grade Page (Mark Grade page in the Class flow for an individual learner.)		Image 21	
Component Details Page		Image 21	
Component Roster Page		Image 21	
View Learner Page		Image 21	
Mark Grade Page (Mark Grade page in the Session flow.)		Image 21	
Fluid Learning Instructor Pages as Seen on Desktop/Tablet Devices			

Fluid Page	***Classic Page (Replaced or Counterpart)***	***Image Delivered***	***Comments***
My Classes Page		Image 21	
Setup Filters Page		Image 21	
Add Filter Page		Image 21	
Class Details Page		Image 21	
Schedule Page		Image 21	
Add Supplemental Learning		Image 23	
Learning Insights Tile		Image 23	
Insights Home page		Image 23	
Manage Plans Tile		Image 23	
Manage Plans Page		Image 23	
Manage Objectives Tile		Image 23	
Manage Objectives Page		Image 23	
Team Learning Tile		Image 23	
Team Learning Page		Image 23	
Manage Team Plans Tile		Image 23	
Manage Plans Page		Image 23	
Manage Team Objectives Tile		Image 23	
Manage Team Objectives Page		Image 23	

Understanding PeopleSoft Fluid User Interface Home Pages

This overview discusses the PeopleSoft Fluid User Interface.

The PeopleSoft Fluid User Interface

Oracle's PeopleSoft has two user interfaces:

- PeopleSoft Classic User Interface, which was designed to be used on a laptop and desktop.

  This interface was previously know as PIA (PeopleSoft Internet Architecture).

- PeopleSoft Fluid User Interface, which was designed to be used on mobile devices, but can also be used on a laptop and desktop.

  Oracle delivers fluid pages for a variety of self-service transactions.

PeopleTools documentation regarding the PeopleSoft Fluid User Interface includes:

- *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.
- *PeopleTools: Fluid User Interface Developer's Guide*

Getting Started with Fluid

Fluid Home Pages

Home pages are collections of tiles that users tap to access transactions. A home page can display different tiles on different form factors. For example, several of the tiles on the delivered employee self-service home page do not show up on small form factors (phones).

Users can have multiple home pages. The main Fluid Home provides access to all of these home pages. The Fluid Home appears when users sign into the system in fluid mode (that is, when users sign in from a mobile device or, if fluid is enabled for desktop devices, from a browser that supports fluid pages). Users can additionally access the Fluid Home by selecting Fluid Home from the classic menu.

PeopleSoft Fluid User Interface Concepts

Getting Started with PeopleSoft Fluid User Interface

The Fluid Home initially displays the user's default home page. To access a different home page, the user taps the home page title and then selects a different home page from the list that appears.

Tapping a tile on a home page opens the corresponding transaction. Most of the delivered tiles open fluid pages, but a few open classic pages.

Home page tiles also can display dynamic information, such as the last pay date or the number of current performance documents. Personalization options enable users to choose which tiles appear on each home page.

PeopleSoft ELM includes four delivered home pages. The delivered home pages and their tiles are described in these topics:

- Using the PeopleSoft Fluid User Interface for Employee Learning Self-Service
- Using the PeopleSoft Fluid User Interface for Manager Self-Service
- Using the PeopleSoft Fluid User Interface for Instructor Self-Service
- Using the PeopleSoft Fluid User Interface for Talent Administrator Self-Service

Fluid Transactions and Conditional Navigation

If a fluid page is equivalent to a classic page, then in fluid mode, the classic menu provides navigation to the fluid page rather than to the classic page. For example, when you are not in fluid mode, the classic menu includes the path Main Menu > Enterprise Learning > Instructor Tasks > View Schedule, which provides access to the classic View Schedule page. In fluid mode, this menu path is not available, and instead the classic menu provides a path to the fluid page: Fluid Home > Learning Instructor > View Schedule > Schedule page. This substitution means that the classic page is not accessible at all in fluid mode. The logic that directs users to fluid page rather than an equivalent classic page is known as conditional navigation. Conditional navigation is also the mechanism that displays the fluid home when users initially access the system on a mobile device.

If a user on a desktop or laptop accesses a fluid home page and taps a tile, conditional navigation logic will not redirect the users to a classic page. Note, however, that PeopleSoft HCM ELM delivers some tiles that open classic pages. This is not a function of conditional navigation. The tile opens a classic page because there is no fluid version of the page. The tile functions solely as a navigational shortcut to the classic page.

Note: The user needs to have the appropriate Fluid role to be transferred to the Fluid page. If a user on a desktop or laptop accesses a fluid home page and taps a tile, conditional navigation logic does not redirect the users to a classic page.

Common Elements Used with PeopleSoft Fluid User Interface

This section describes the standard controls that appear either in the banner at the top of every fluid page.

Term	***Definition***
 (Home)	Tap to return to the main PeopleSoft Home page.
 (Search)	Tap to access PeopleSoft Global Search functionality.
 (Notifications)	Tap to view actions and alerts in a notifications window.

Term	*Definition*
 (Actions List)	Tap to see a list of available actions for the current window. The Sign Out command is always available under this menu, as are context-appropriate personalization options.
 (Nav Bar)	Tap to use the Navigation Bar (Nav Bar). The Nav Bar provides handy navigation options such as Recent Places, My Favorites, Navigator (which expands to show the classic menu hierarchy), and Classic Home. Users can also add and remove fluid tiles from the Nav Bar using personalization options.

Understanding Drop Zones

Drop Zones allows you to add custom content such as editable or display only fields, links, buttons, or text. PeopleSoft has added Drop Zones to the top, middle, and bottom of some Fluid pages. You can create records, sub-pages, and other new objects you want to display using Drop Zones.

For more information on Drop Zones, see the product documentation for *PeopleTools: Fluid User Interface Developer's Guide,* "Creating Pages for Fluid Applications," Creating and Configuring Drop Zones.

Note: For future uptake of drop zones, use the *PeopleTools Features* tracking group. Enter the tracking group value *Drop Zone Support for PT8.57* (or above).

This video provides an overview of Drop Zones:

PeopleSoft Drop Zones

Components Where Drop Zones are Enabled

This table lists the components where drop zones are enabled:

Product / Owner	*Component*	*Component Description*	*Image Drop Zone was Enabled*
ELM Catalog	LM_ACT_DTL_FL	Class	Image 19
ELM Business Objects	LM_EXT_USER_REG_FL	Registration	Image 19
ELM Enrollment Curriculum	LM_REG_FLU	Program Registration Component	Image 19
ELM Curriculum	LM_PROGRAM_SS_FLU	Program	Image 19
ELM Curriculum	LM_RECERT_SS_FLU	Employee Certification Status	Image 19

Product / Owner	***Component***	***Component Description***	***Image Drop Zone was Enabled***
Enterprise Learning Management	LM_ACT_DTLS_FL	My Course Progress	Image 19
Enterprise Learning Management	LM_ACT_ENRL_FL	Learner Enrollment	Image 19
Enterprise Learning Management	LM_ANNOUNCMNT_ DFLU	Announcement Details	Image 19
Enterprise Learning Management	LM_ANNUNCEMNT_FLU	Announcements	Image 19
Enterprise Learning Management	LM_CRS_DTL_FL	Course Details	Image 19
Enterprise Learning Management	LM_FND_LRN_FL	Find Learning	Image 19
Enterprise Learning Management	LM_FND_LRN_GPLT_FL	Find Learning Grouplet	Image 19
Enterprise Learning Management	LM_HR_CUR_LRNG_FLU	Team Learning Fluid	Image 19
Enterprise Learning Management	LM_MTDL_FLU	Learning	Image 19
Enterprise Learning Management	LM_MYCOURSES_FL	My Learning	Image 19
Enterprise Learning Management	LM_SUPP_LNR_ADD_FL	Add Supplemental Learning	Image 19
Enterprise Learning Management	LM_SURVEY_FL	Fluid Survey	Image 19

Using the PeopleSoft Fluid User Interface for Employee Learning Self-Service

This topic discusses the PeopleSoft Fluid User Interface pages for employee self-service.

Pages Used to Perform Employee Learning Self-Service Using the PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Employee Self-Service Homepage	LM_SELF_SERVICE_FL	Access employee self-service transactions.
Learning Tile	LM_MTDL_FLU_GBL	Access the Learning dashboard.

User Access

User Role	***Access***
Learning Employee Fluid	Provides access to the employee self-service transactions.

Employee Self-Service Homepage

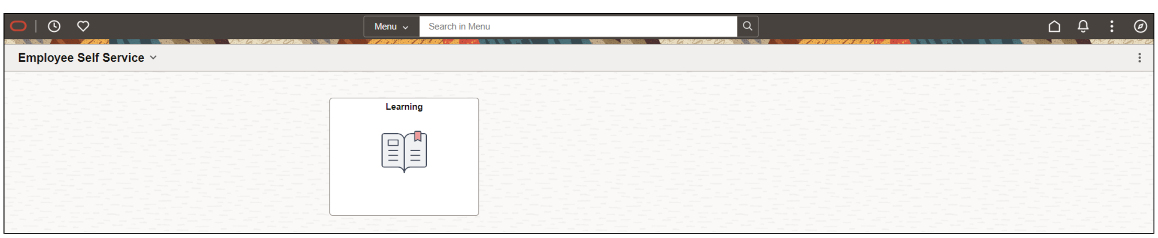
Use the Employee Self-Service homepage (LM_SELF_SERVICE_FL) to access employee self-service transactions.

Navigation:

On a mobile device, the fluid home appears when you first sign in. On a desktop or laptop, access the fluid home by selecting **Fluid Home** under the main menu. The default homepage title appears at the top of the homepage.

If the Employee Self-Service homepage is not your default homepage, click the title of the default homepage and select Employee Self-Service from the list that appears.

This example illustrates the delivered Employee Self-Service homepage.



Note: This homepage is available to internal learners only. If you are an external learner, the system takes you to the Learning Dashboard when you first sign in.

Learning Tile

As delivered, this homepage has just one tile. The Learning tile provides access to the Learning Dashboard.

Additional Tiles

If you setup integration through the PeopleSoft Interaction Hub or cluster your environment directly to PeopleSoft HCM, the Employee Self-Service page can also display tiles from the integrated systems.

The following HCM tiles automatically appear on the Manager Self Service homepage when integration to the source system is active and the user has security access to the tiles. All tiles are from PeopleSoft HCM, except that the Company News tile is from the PeopleSoft Interaction Hub.

- Company News
- Time
- Pay (for PeopleSoft Payroll for North America)
- Payslips (for PeopleSoft Global Payroll)
- Personal Details
- Talent Profile
- Benefits
- Performance
- Total Rewards

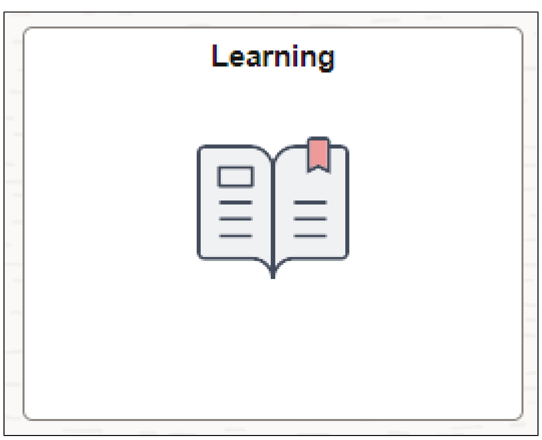
Learning Tile

Employees use the Learning tile (LM_MTDL_FLU_GBL) to access the Learning dashboard.

Navigation:

The Learning tile is delivered as part of the Employee Self-Service fluid homepage.

This example illustrates the Learning tile.



Click anywhere on this tile to access the Learning Dashboard, which provides access to self-service learning transactions.

Working with the Learning Dashboard

This topic discusses the Learning dashboard.

Pages Used to Work with the Learning Dashboard

Page Name	***Definition Name***	***Usage***
Learning Dashboard	LM_FND_LRN_GPLT_FL_DB_LINK	Access self-service transactions that leverage Fluid Learner capabilities.
Announcements Tile	LM_ANNUNCEMNT_FLU_GBL	Access a list of learning-related announcements.
Add Supplemental Learning Tile	LM_SUPP_LNR_ADD_FL_GBL	Access the Add Supplemental Learning page.
My Learning Tile	LM_MTDL_FLU_GBL	Access the My Learning page.
Find Learning Tile	LM_FND_LRN_FL_GBL	Search for learning.
Manage Plans Tile	LM_LPLN_ESS_FL_GBL	Manage learning plans for the learner.
Manage Objectives Tile	LM_OBJV_SS_FL	Manage learning objectives for the learner.
Survey Page	LM_SURVEY_FL	Gather learner feedback on the effectiveness of a particular learning component.

User Access

User Role	***Access***
Learning Employee Fluid	Provides access to the employee self-service transactions.

Understanding the Learning Dashboard

PeopleSoft ELM Users need to be able to access educational content using smartphones or tablets so they can manage learning items at their own convenience without using a desktop or laptop computer. The Fluid Learner capabilities accessed through the Learning dashboard are an extension of the existing PeopleSoft ELM application that has been specifically designed for mobile devices.

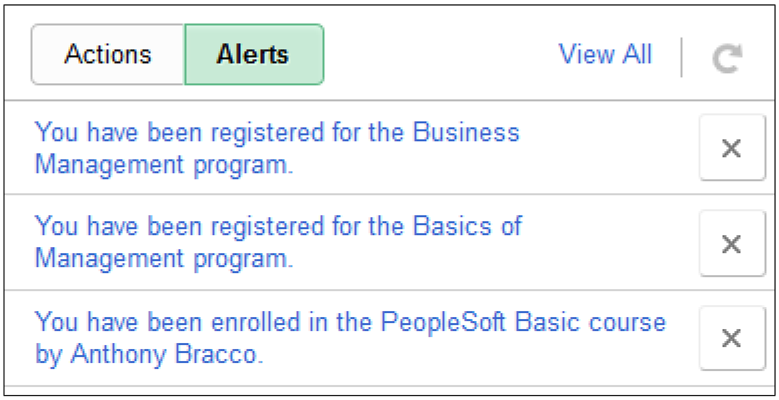
From the Learning dashboard, learners can search for, view, manage, and launch learning content from their smartphones or tablets.

PeopleSoft Fluid Mobile Learning

Learning Alerts

Learning transactions such as enrolling in a course, or registering for a program generate alerts that you can view by clicking the Notifications icon. You can click an alert to access the My Course Progress Page or Program Page for the corresponding class or program.

This is an example of the learning alerts that appear when you click the Notifications icon.



Learning Dashboard

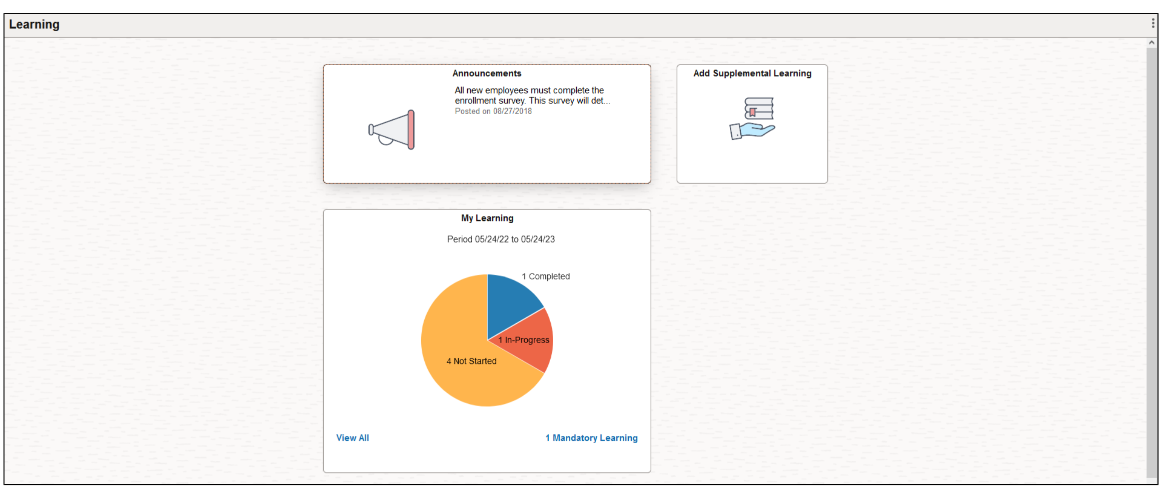
Use the Learning dashboard (LM_FND_LRN_GPLT_FL_DB_LINK) to access self-service transactions that leverage Fluid Learner capabilities.

Navigation:

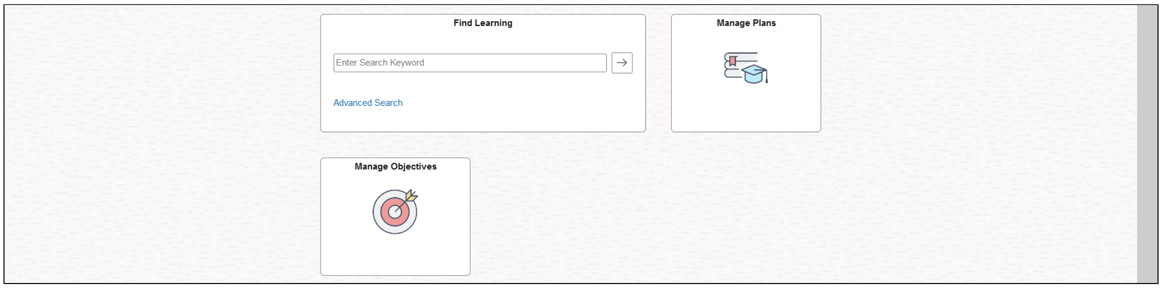
For external learners, the dashboard appears when they first sign in.

Internal learners access the dashboard by clicking the Learning tile on the Employee Self-Service fluid homepage.

This example illustrates the Learning dashboard (Page 1 of 2).



This example illustrates the Learning dashboard (Page 2 of 2).



Field or Control	***Description***
Announcements	View a list of learning-related announcements.
Add Supplemental Learning	Add supplemental learning achievements.
My Learning	View and manage your current courses, programs, mandatory learnings, and supplemental learnings.
Find Learning	Search for learning.
Manage Plans	Manage learning plans.
Manage Objectives	Manage learning objectives.

Announcements Tile

Use the Announcements tile (LM_ANNUNCEMNT_FLU_GBL) to access a list of learning-related announcements.

Navigation:

Employee Self Service > **Learning** > **Announcements**

This example illustrates the Announcements tile.

This tile displays a preview of the text of your most recent announcement along with the date on which it was posted. Click anywhere on this tile to access the Announcements Page where you can view a list of learning-related announcements.

Add Supplemental Learning Tile

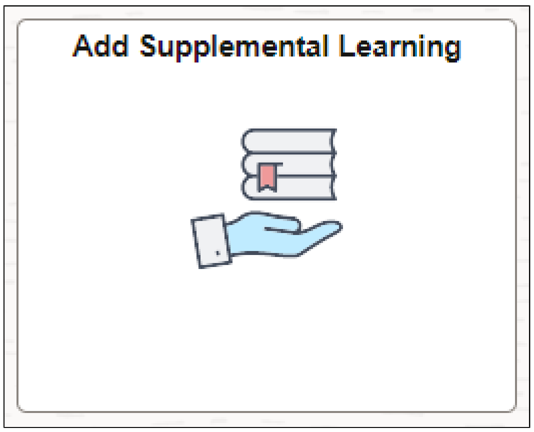
Use the Supplemental Learning tile (LM_SUPP_LNR_ADD_FL_GBL) to add external learning.

Navigation:

Employee Self Service > **Learning** > **Add Supplemental Learning**

The Add Supplemental Learning tile is delivered as part of the Learning dashboard.

This example illustrates the Add Supplemental Learning tile.



Click Add Supplemental Learning tile to access the Add Supplemental Learning page.

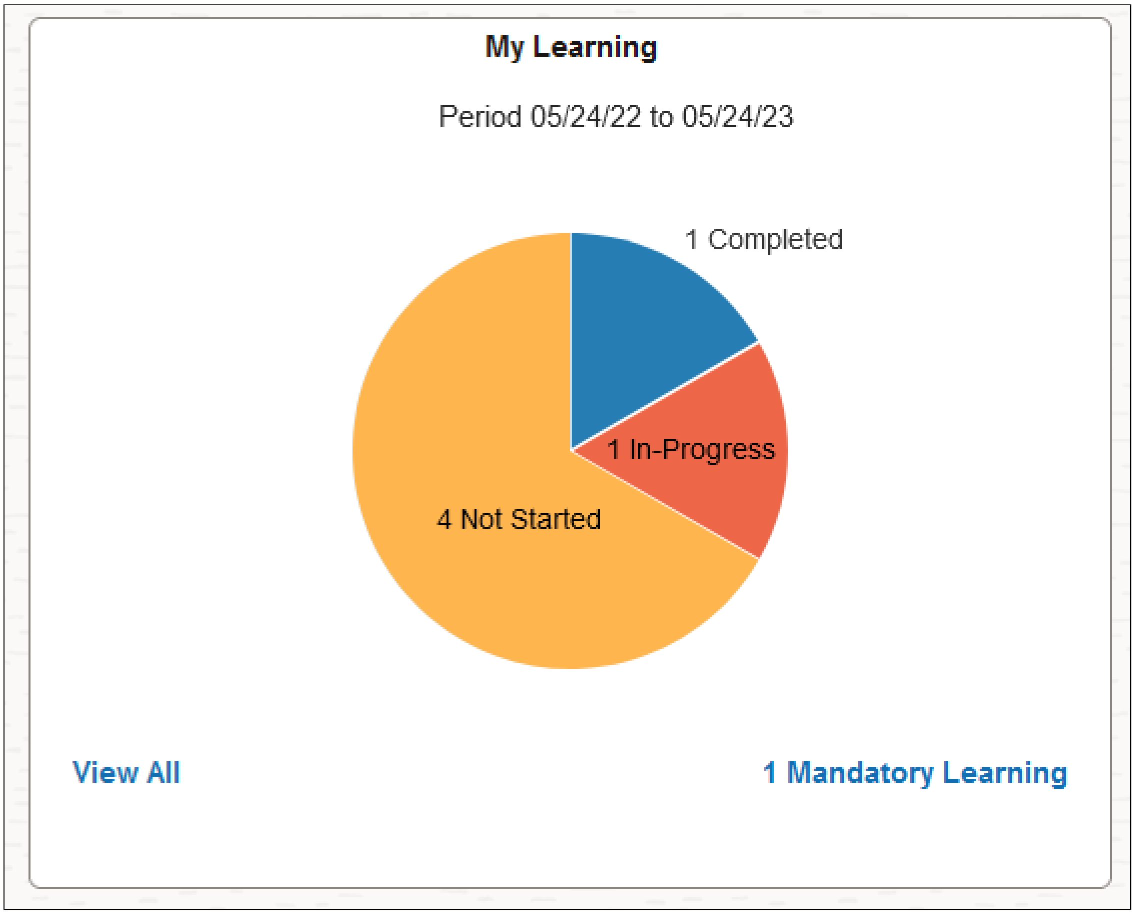
My Learning Tile

Use the My Learning tile (LM_MTDL_FLU_GBL) to access the My Learning page.

Navigation:

Employee Self Service > **Learning** > **My Learning**

This example illustrates the My Learning tile.



Click the 'View All' link in this tile to access the My Learning Page: Current Tab. This tile also displays the following dynamic learning information:

Field or Control	***Description***
(number) Due this week	Displays the number of courses that are approaching due date in the current week.

Field or Control	***Description***
Enrolled Courses pie chart	Displays a learning pie chart with slice value in percentages of courses, programs and supplemental learnings which are in **Not Started**, **In-Progress** and **Completed** statuses. This information appears only when there are courses, programs and supplemental learnings to which the learner is enrolled. **Note:** The enrollment should be within the date range as given in the Install Defaults – Fluid Defaults Page. If date range is not indicated in the setup page then the data in the pie chart will be displayed for 365 days. **No Enrolled Learning** appears when there are no enrollments. A legend with the actual number of courses, programs and supplemental learnings in each status is also available.
View All	Click the View All link to access the My Learning: Current tab which lists all the learnings in which the learner is enrolled.
(number) Mandatory Learning	Click the (number) Mandatory Learning link to directly access the My Learning: Current tab with the filter applied to list only the mandatory courses.

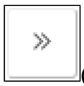
Find Learning Tile

Use the Find Learning tile (LM_FND_LRN_FL_GBL) to search for learning.

Navigation:

Employee Self Service > **Learning** > **Find Learning**

This example illustrates the Find Learning tile.

Field or Control	***Description***
Enter Search Keyword	Enter keywords to use for your basic search. The system obtains basic search results by matching the keywords that you enter with the Course or Program Title, Course and Program Description, Course and Program Code, Learning Type, Class Code, Location State Code, Location Name, and Keywords defined for learning.
(Search)	Click to search for learning using the keyword you entered. The results are displayed on the Find Learning Page.
Advanced Search	Instead of searching by basic keyword, you can click this link to access the Advanced Search Page where you can enter more specific search criteria.

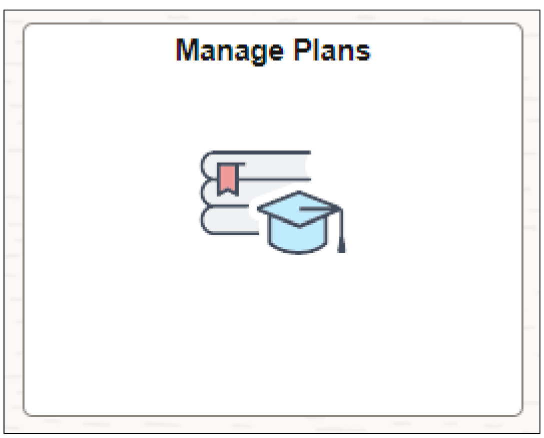
Manage Plans Tile

Use the Manage Plans tile (LM_LPLN_ESS_FL_GBL) to manage your learning plans.

Navigation:

Employee Self Service > **Learning** > **Manage Plans**

This example illustrates the Manage Objectives tile.



Click the Manage Plans tile to access the Manage Plans page.

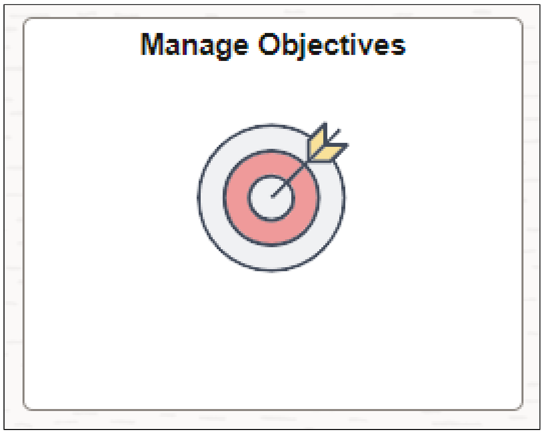
Manage Objectives Tile

Use the Manage Objectives tile (LM_OBJV_SS_FL) to manage your objectives.

Navigation:

Employee Self Service > **Learning** > **Manage Objectives**

This example illustrates the Manage Objectives tile.



Click the Manage Objectives tile to access the Manage Objectives page.

Survey Page

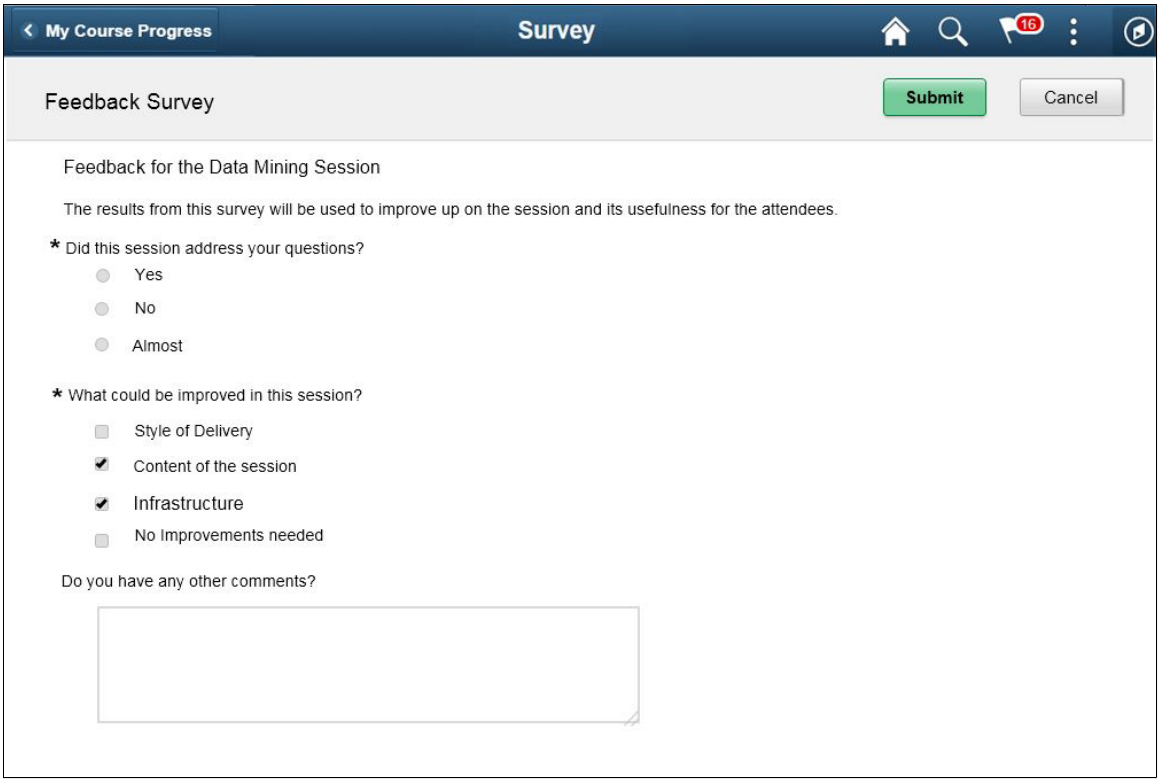
Use the Survey page (LM_SURVEY_FL) to gather learner feedback on the effectiveness of a particular learning component.

A survey can be defined in the Survey Definition page. Once it is created/defined in the Survey Definition page, it can be attached to a class as a survey learning component. When a learner is enrolled to this class, the survey learning component can be launched from the My Learning page.

Navigation:

The survey learning component is launched from the learner's My Learning page.

This example illustrates the fields and controls on the Survey page.



Related Links

Creating Survey Learning Components
Adding Learning Components to Classes

Working with Announcements Using the PeopleSoft Fluid User Interface

This topic discusses the PeopleSoft Fluid User Interface pages used to view learning-related announcements.

Pages Used to Work with Announcements

Page Name	***Definition Name***	***Usage***
Announcements Tile	LM_ANNUNCEMNT_FLU_GBL	Access a list of learning-related announcements.
Announcements Page	LM_ANNUNCEMNT_FLU	View a list of learning-related announcements.
Announcements - Details Page	LM_ANNOUNCMNT_DFLU	View the full text of an announcement.

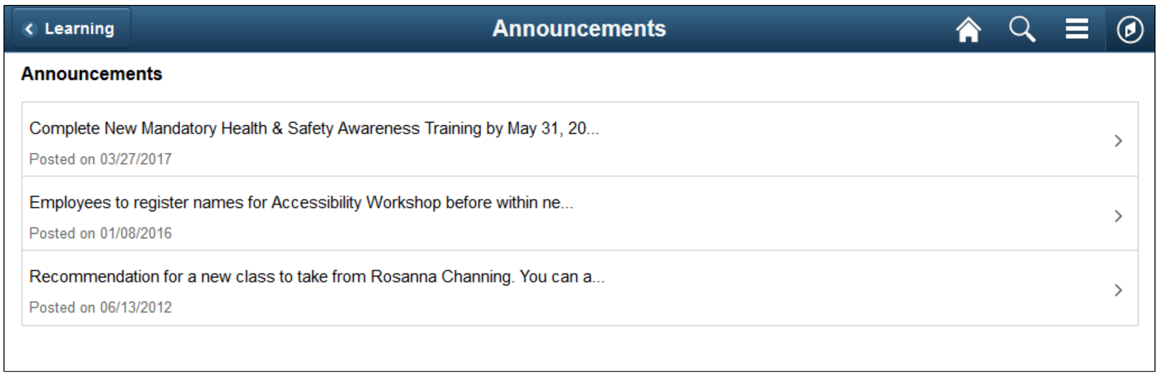
Announcements Page

Use the Announcements page (LM_ANNUNCEMNT_FLU) to view a list of learning-related announcements.

Navigation:

Click the Announcements tile.

This example illustrates the fields and controls on the Announcements page.



This page displays a list of your announcements. You can preview the text of each announcement along with the date on which it was posted. Click an announcement to access the Announcements - Details Page where you can view the full text of the announcement.

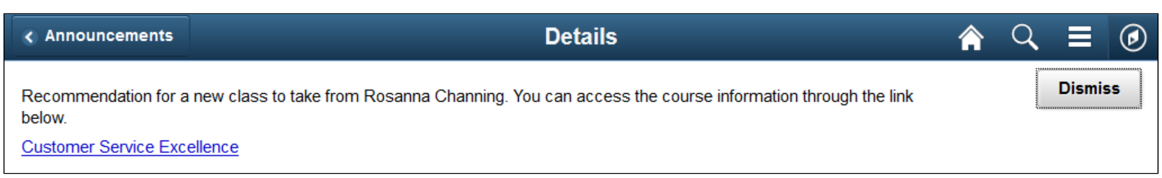
Announcements - Details Page

Use the Announcements - Details page (LM_ANNOUNCMNT_DFLU) to view the full text of an announcement.

Navigation:

Click an announcement on the Announcements page.

This example illustrates the fields and controls on the Announcements - Details page.



This page enables you to view the full text of an announcement along with any relevant links.

Field or Control	***Description***
Dismiss	Click to remove the announcement from your list of announcements. The user who created the announcement determines whether this button is available. For more information on announcements, see Creating and Sending Ad Hoc Notifications and Announcements.

Using the PeopleSoft Fluid Interface To Add Supplemental Learning

This topic describes how to use the PeopleSoft Fluid Interface to add supplemental learning for a learner.

Pages Used to Add Supplemental Learning Using the PeopleSoft Fluid User Interface

This section discusses on the pages used to add supplemental learning for a learner.

Page Name	***Definition Name***	***Usage***
Add Supplemental Learning	LM_SUPP_LNR_ADD_FL	Add external learning for a learner.

User Access

User Role	***Access***
Learning Manager Fluid	Provides manager with the access to manage supplemental learning for the team.
Learning Employee Fluid	Provides learner with the access to add supplemental learning.

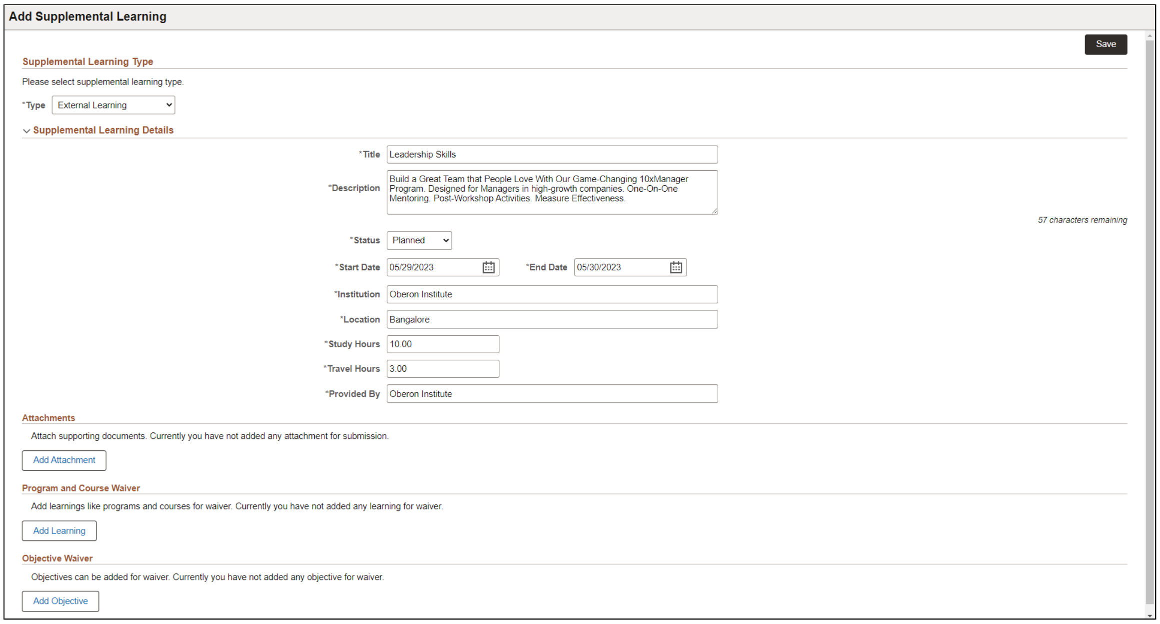
Add Supplemental Learning

Use the Add Supplemental Learning (LM_SUPP_LNR_ADD_FL) page to add external learning for a learner.

Navigation:

- For Learner: **Employee Self Service** > **Learning** > **Add Supplemental Learning**
- For Manager: **Manager Self Service** > **Team Learning** > **Add Supplemental Learning**

This example illustrates the fields and controls on the Add Supplemental Learning page.



This page allows the logged-in user to add supplemental (external) learning achievements to a learner's record based on the supplemental learning type such as seminar or conference, an academic course or an equivalent external work experience, or some form of on-the-job training. To add an external learning, the user should first select the type of supplemental learning and enter the details for the selected type.

Field or Control	***Description***
<Learner name>	Click to view the selected learner (team member) in a modal window. The link displays the learner's name. In case of supplemental group enrollment, the link displays the learner's name and (n-1), where n is the total number of selected learners. **Note:** This is applicable only for managers.
Type	Select the supplementary learning type. Available options are *Conference*, *Equivalent Experience*, *External Learning*, *On-the-Job Training (OJT)*, *Seminar*, and *Technical Summit*. The options under the **Supplemental Learning Details** vary based on the learning type. To know more, see <u>Supplemental Learning Details</u>.
Supplementary Learning Details	Enter the details for the supplemental learning. This includes the title, description, status, start and end date, location, study and travel hours and price. Available options for Status are: *Planned*, *In-Progress*, and *Submit For Approval*.
Add Attachment	Click to upload supporting documents for the learning.

Field or Control	*Description*
Add Learning	Click to add learnings like programs and courses for waiver.
Add Objective	Click to add objective for waiver.
Submit	Click to add the supplemental learning for the learner.

Related Links

Using the PeopleSoft Fluid User Interface for Employee Learning Self-Service
Using the PeopleSoft Fluid User Interface for Manager Self-Service
Using the PeopleSoft Fluid Interface For Team Learning

Finding Learning Using the PeopleSoft Fluid User Interface

This topic discusses how to use the PeopleSoft Fluid User Interface to search for learning.

Pages Used to Find Learning

Page Name	*Definition Name*	*Usage*
Find Learning Tile	LM_FND_LRN_GPLT_FL_GBL	Search for learning.
Advanced Search Page	LM_FND_LRN_ADV_SCF	Search for learning using advanced criteria.
Find Learning Page	LM_FND_LRN_RSLT_FL	View the results of your learning search.
Find Learning – Course Page	LM_CRS_DTL_FL	View enrollment options for a course.
Find Learning – Details Page	LM_CRS_DTL_FL	View detailed information for a course.
Enrollment Page	LM_ACT_ENRL_SS_FL	Enter payment details and select associated programs for automatic registration.
Offering Details Page	LM_ACT_DETAILS_SCF	View details for a specific course offering.
Program Page	LM_PRG_DETAIL_FLU	View details and register for a program.

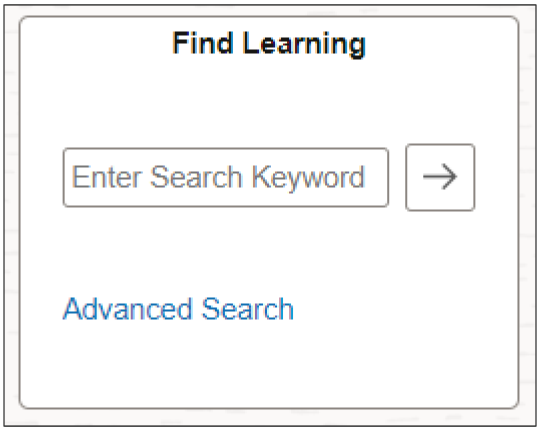
Find Learning Tile

Use the Find Learning tile (LM_FND_LRN_FL_GBL) to search for learning.

Navigation:

Employee Self Service > **Learning** > **Find Learning**

This example illustrates the Find Learning tile.



For more information, see Find Learning Tile.

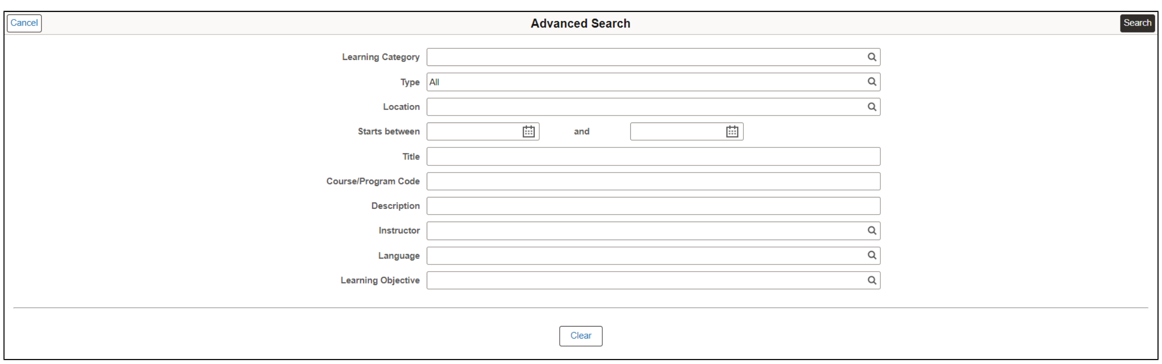
Advanced Search Page

Use the Advanced Search page (*LM_FND_LRN_ADV_SCF*) to search for learning using advanced criteria.

Navigation:

Click the Advanced Search link on the Find Learning tile.

This example illustrates the fields and controls on the Advanced Search page.



Field or Control	***Description***
Cancel	Click to return to the Find Learning tile.

Field or Control	*Description*
Search	Click to search for learning based on the entered criteria.
Learning Category	Enter a value to find learning within a specific category. Categories make finding learning easier by breaking learning up into logical units.
Type	Enter a value to find learning of a specific type.
Location	Enter a value to find learning being offered at a specific location. Advanced search returns all learning that has one or more schedules sessions at the location you enter.
Starts between	Enter a date range in these fields to search for learning taking place within a specific time frame.
Title	Enter a value to find learning by title.
Course/Program Code	Enter a value to find learning with a specific course or program code.
Description	Enter a value to find learning by description.
Instructor	Enter a value to find learning taught by a specific instructor.
Language	Enter a value to find classes taught in a specific language. **Note:** If you search using this field, your search results will include only classes because you do not specify a language for programs.
Learning Objective	Enter a value to find learning associated with a specific objective. You achieve objectives when you successfully complete learning items. Objectives can be skills, competencies, or other learning goals that might be associated with different learning.
Clear	Click to remove values from all fields on the Advanced Search page.

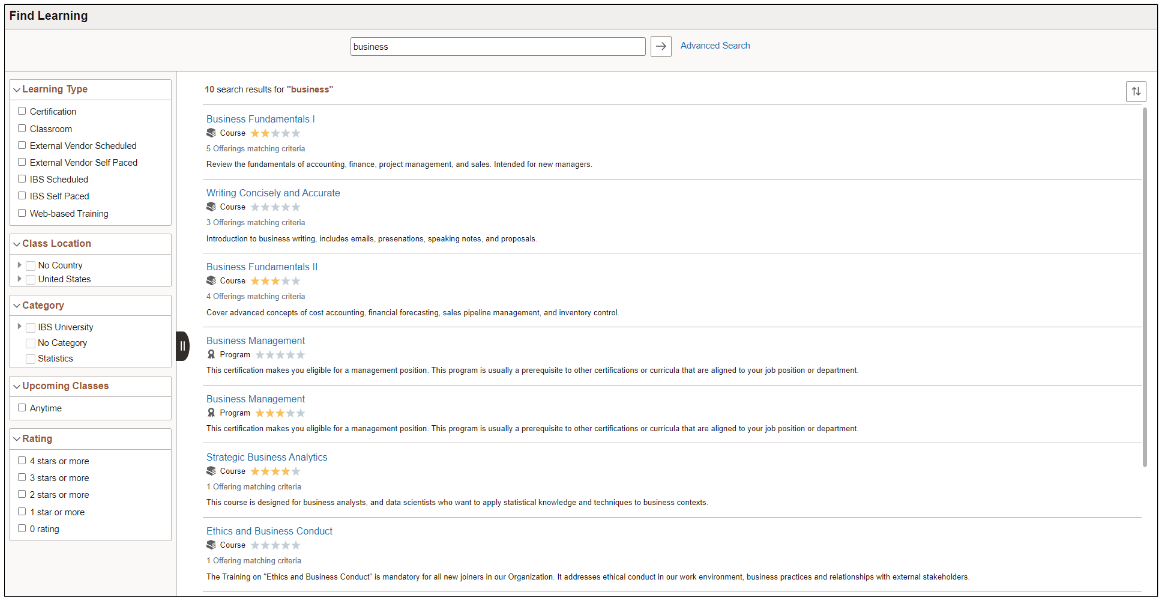
Find Learning Page

Use the Find Learning page (LM_FND_LRN_RSLT_FL) to view the results of your learning searches.

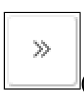
Navigation:

Click the Search button on the Find Learning tile or the Advanced Search page.

This example illustrates the fields and controls on the Find Learning page.



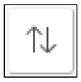
Note: If all the classes in a course are marked as 'restricted to programs', that course is not displayed in the fluid version of Find Learning.

Field or Control	***Description***
Enter Search Keyword	Enter keywords to use for your basic search.
(Search)	Click to search for learning using the keyword you entered.
Advanced Search	Instead of searching by basic keyword, you can click this link to access the Advanced Search Page where you can enter more specific search criteria.

Search Results

This section of the page displays all of the courses and programs that meet your search parameters. The number of results displayed is limited by the number entered in the **Maximum Rows Returned for Search** field on the Install Defaults page.

Note: The number of search results listed represents the number of courses and programs that meet your search criteria, not the number of offerings.

Field or Control	*Description*
 (Sort)	By default, the system sorts the search results by relevance. Click the Sort button to change how the search results are sorted. You can sort by: • **Title:** Select to sort search results alphabetically by title. • **Type:** Select to sort search results by type (course or program). Search results are sorted alphabetically within these two learning types. • **Relevance:** Select to sort search results by relevance, which is the default sort order.

Each search result includes the following information:

- Title of the learning
- An icon and descriptor indicating whether the learning is a course or a program.
- Star rating
- For courses, the number of class offerings matching your search criteria.
- Description of the learning.

If you are already registered for a program or enrolled in a course listed in the search results, the system displays a message indicating that you are *Already Registered* or *Already Enrolled*. For courses and programs that are already included in your learning plan, the system displays a message indicating that the learning is *Already Planned*.

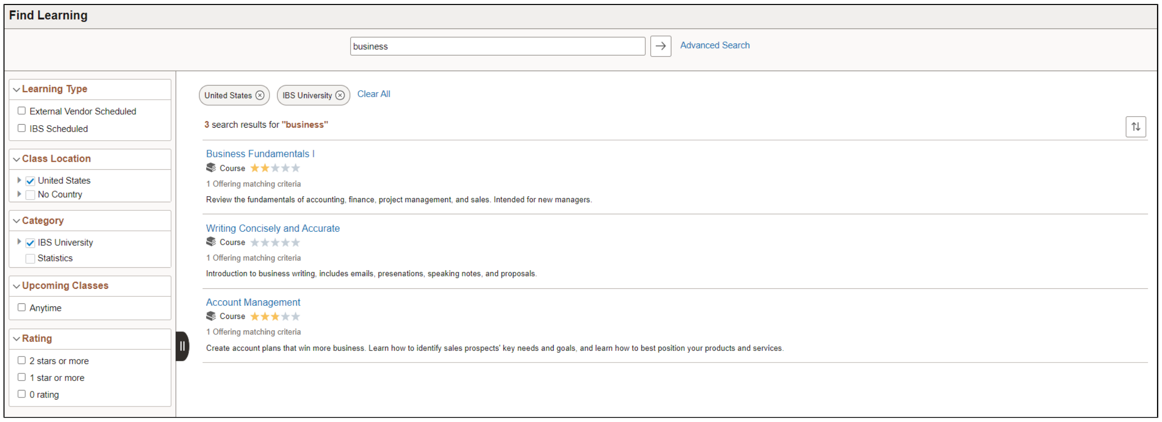
Click a course in the search results to access the Find Learning – Course Page where you can review enrollment options for the course.

Facets

The left panel of the page enables you to quickly filter your search results by learning type, class location, category, upcoming classes and rating. When you click a facet link, the system displays only the learning associated with the link that you select.

Some facet links are hierarchical, meaning that once you select one, additional links become available that enable you to filter the search results further. For example, if you select the United States Class Location facet link, you can then select Class Location facet links for individual states. Other facet links are not hierarchical and do not make additional, more specific facet links available when you click them.

This example illustrates filtering search results using the Location facet.



Field or Control	***Description***
(Remove Facet Filter)	Click to remove a facet filter from the search results.
Clear All	Click to remove all facet filters from the search results.

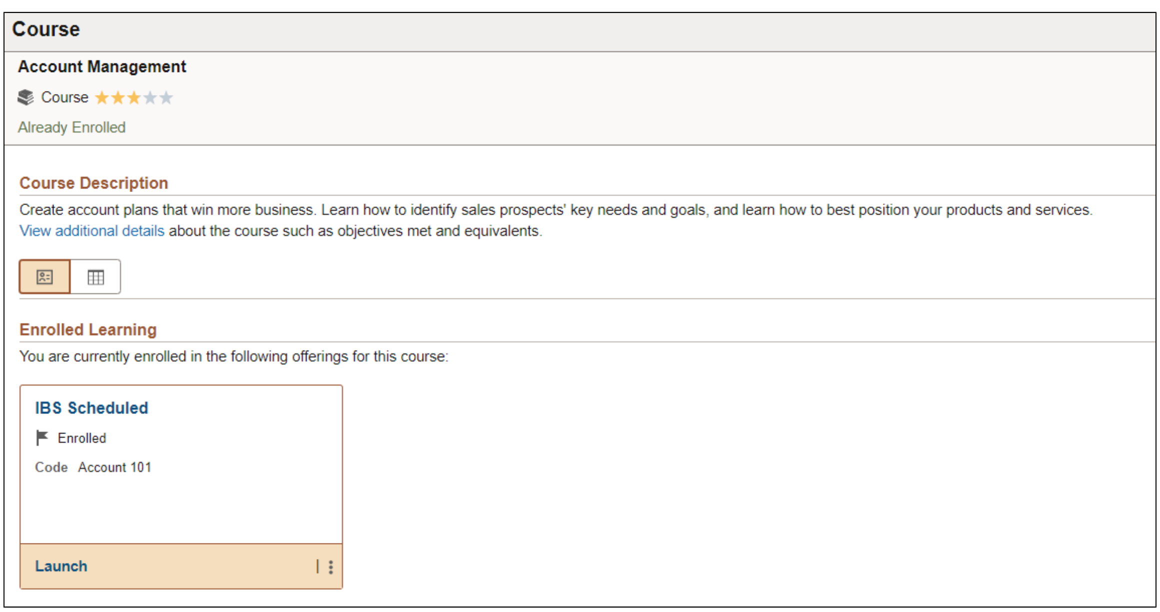
Find Learning – Course Page

Use the Find Learning – Course page (LM_CRS_DTL_FL) to view enrollment options for a course.

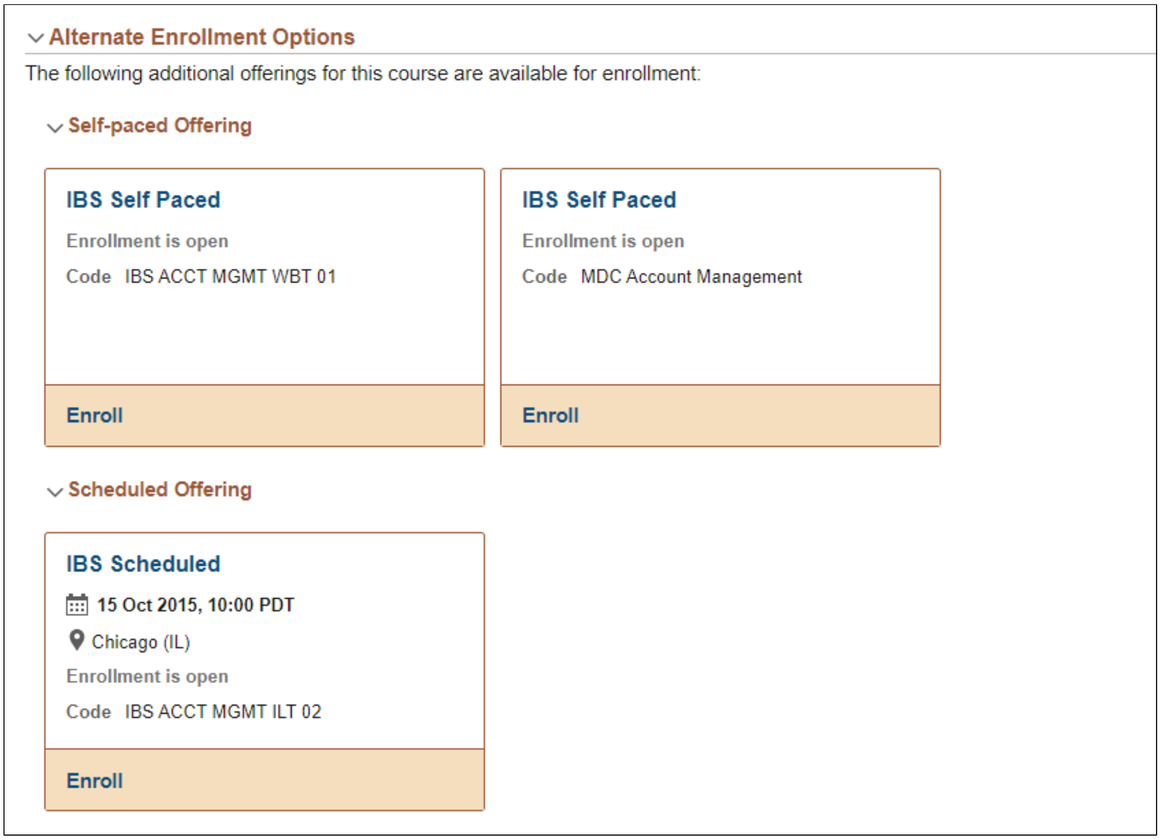
Navigation:

Click a course in the search results of the Find Learning page.

This example illustrates the fields and controls for the card view of the Find Learning - Course page.



This example illustrates the fields and controls for the card view of the Find Learning - Course page.

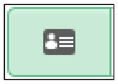
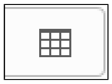


The Course page lists the self-paced and scheduled offerings for the course you selected from the Find Learning search results. If you meet the prerequisites for this course, you can enroll in offerings from this page. If you have not met the prerequisites, a message appears explaining that you must meet the prerequisites of the course before enrolling, and you are not allowed to take enrollment actions. Click the **View Additional Details** details link to view prerequisites for the course.

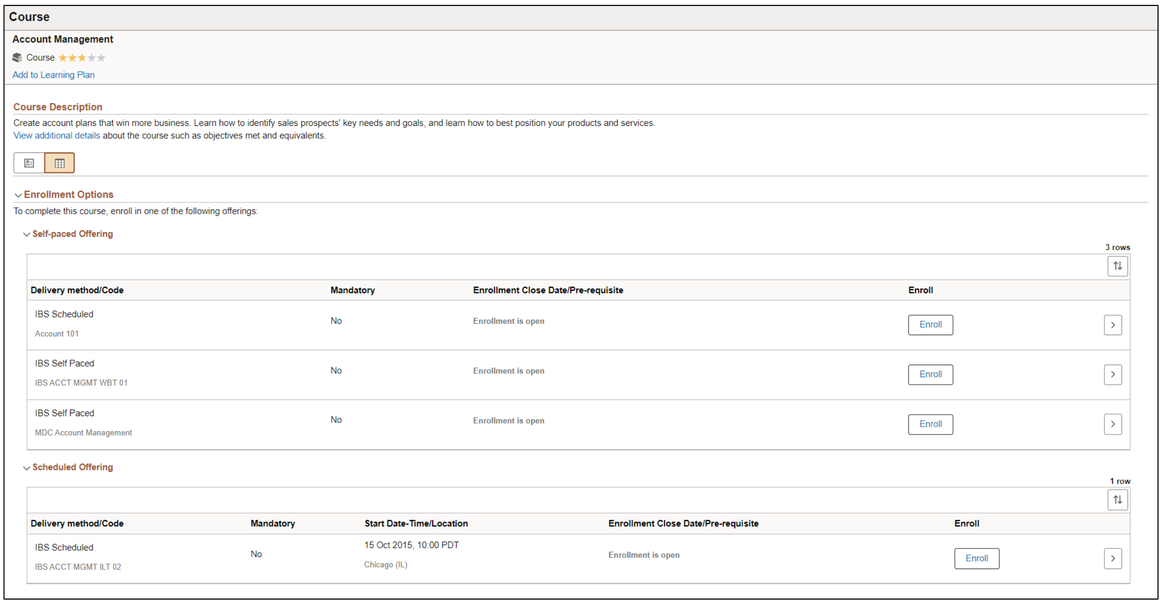
Important! To display a Class card with session(s) in the Course page, ensure to create at least one session inside the session learning component for the class.

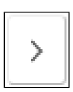
Click a card to access the Offering Details Page for the course offering.

Field or Control	***Description***
Add to Learning Plan	Click to add the course to your default learning plan. If you are enrolled in the course, this link is replaced with text to indicate that you are *Already Enrolled*.
View Additional Details	Click to access the Find Learning – Details Page where you can view detailed information for a course.

Field or Control	*Description*
	Click to access the card view of the Find Learning - Course page. This is the default view when you access the page.
	Click to access the grid view of the Find Learning - Course page.

This example illustrates the fields and controls for the grid view of the Find Learning – Course page.



Field or Control	*Description*
	Click to access the Offering Details Page page for the course offering.

Enrolled Learning

This section appears only if you are already enrolled in one or more offerings for this course.

Field or Control	*Description*
Launch	Click to launch the course offering. For compliant content, this button opens the <Compliant Content> Page.

Note: If you click a card or the Go button for a course in which you are already enrolled, you access the My Course Progress Page instead of the Offering Details Page.

Self Paced Learning

This section lists the self-paced offerings available for the course. Click an offering to access the Offering Details Page where you can view detailed information about the offering.

Field or Control	***Description***
Enroll	Click to enroll yourself in the self-paced offering. The system displays the Enrollment Confirmation page. Click **Return to Search** to return to the Find Learning Page. Click **Go to Course** to access the My Course Progress Page.
Launch	Click to simultaneously enroll yourself in the self-paced offering and launch it.

Scheduled Learning

This section lists the scheduled offerings available for the course. Click an offering to access the Offering Details Page where you can view detailed information about the offering.

Field or Control	***Description***
Enroll	Click to enroll yourself in the scheduled offering. The system displays the Enrollment Confirmation page. Click **Return to Search** to return to the Find Learning Page. Click **Go to Course** to access the My Course Progress Page.

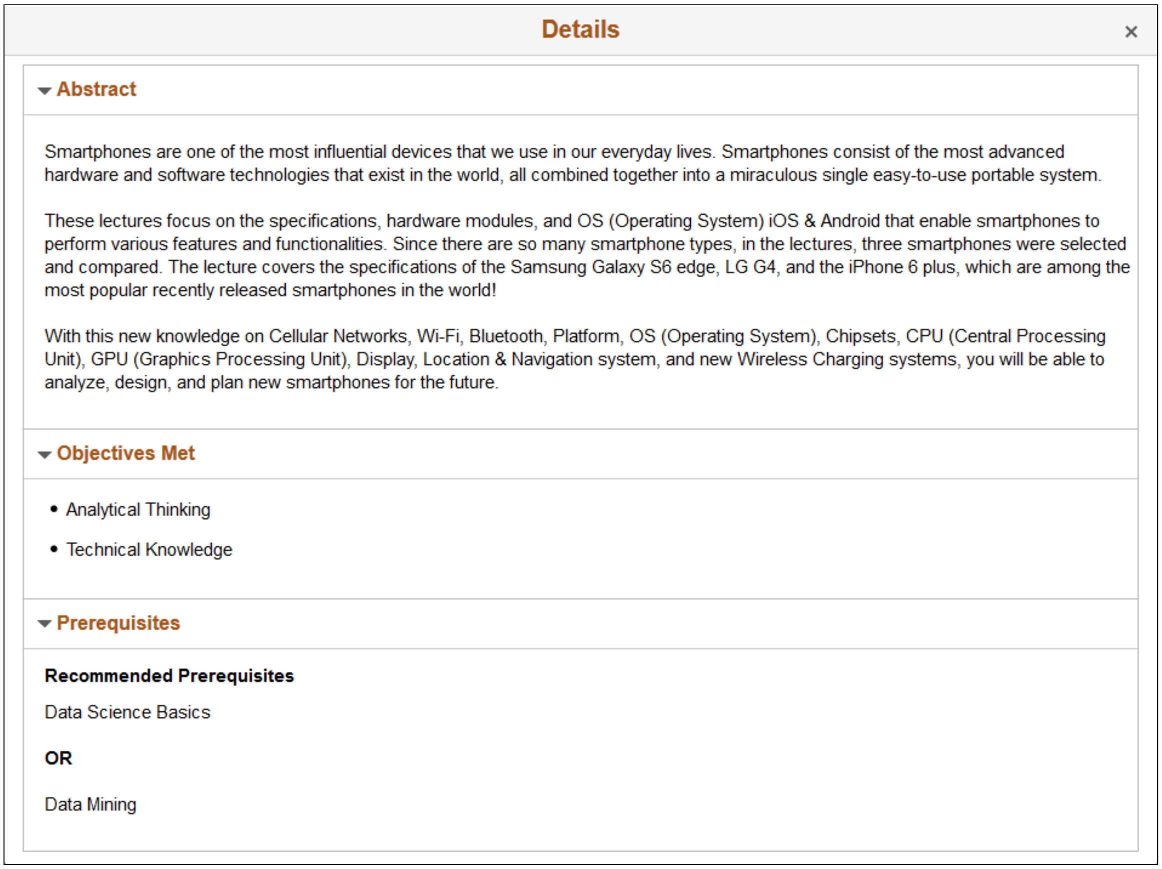
Find Learning – Details Page

Use the Find Learning – Details page (LM_CRS_DTL_FL) to view detailed information for a course.

Navigation:

Click the View Additional Details link on the Course page.

This example illustrates the fields and controls on the Find Learning - Details page.



Abstract

This section displays a description of the course.

Objectives Met

This section displays the learning objectives met by the course.

Prerequisites

This section displays required or recommended prerequisites for the course.

Equivalents

This section displays equivalent courses or objectives for the course.

Notes and Attachments

This section displays notes and attachments associated with the course.

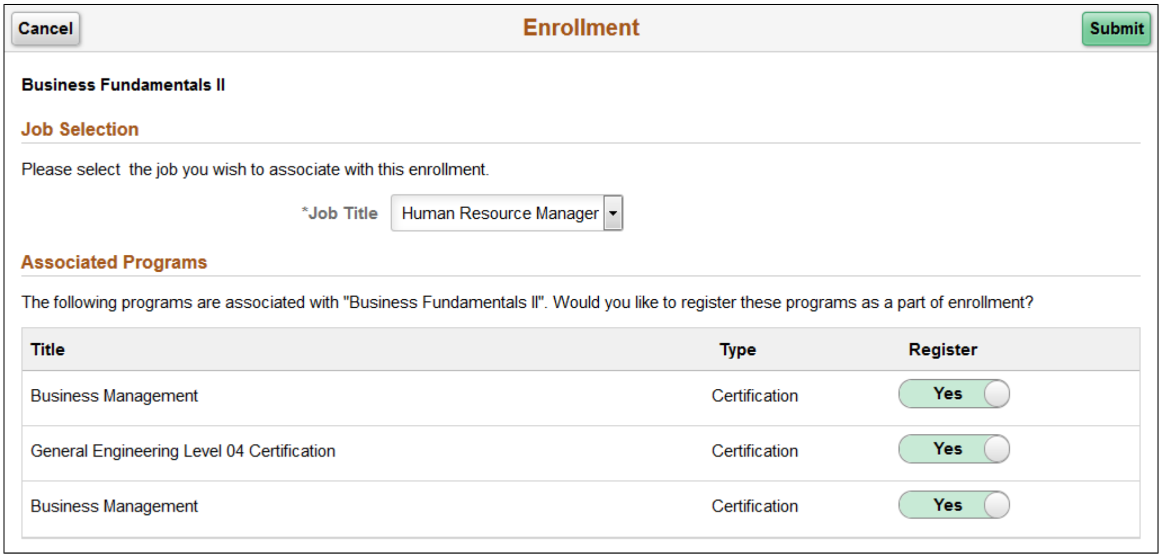
Enrollment Page

Use the Enrollment page to enter payment details and select associated programs for automatic registration.

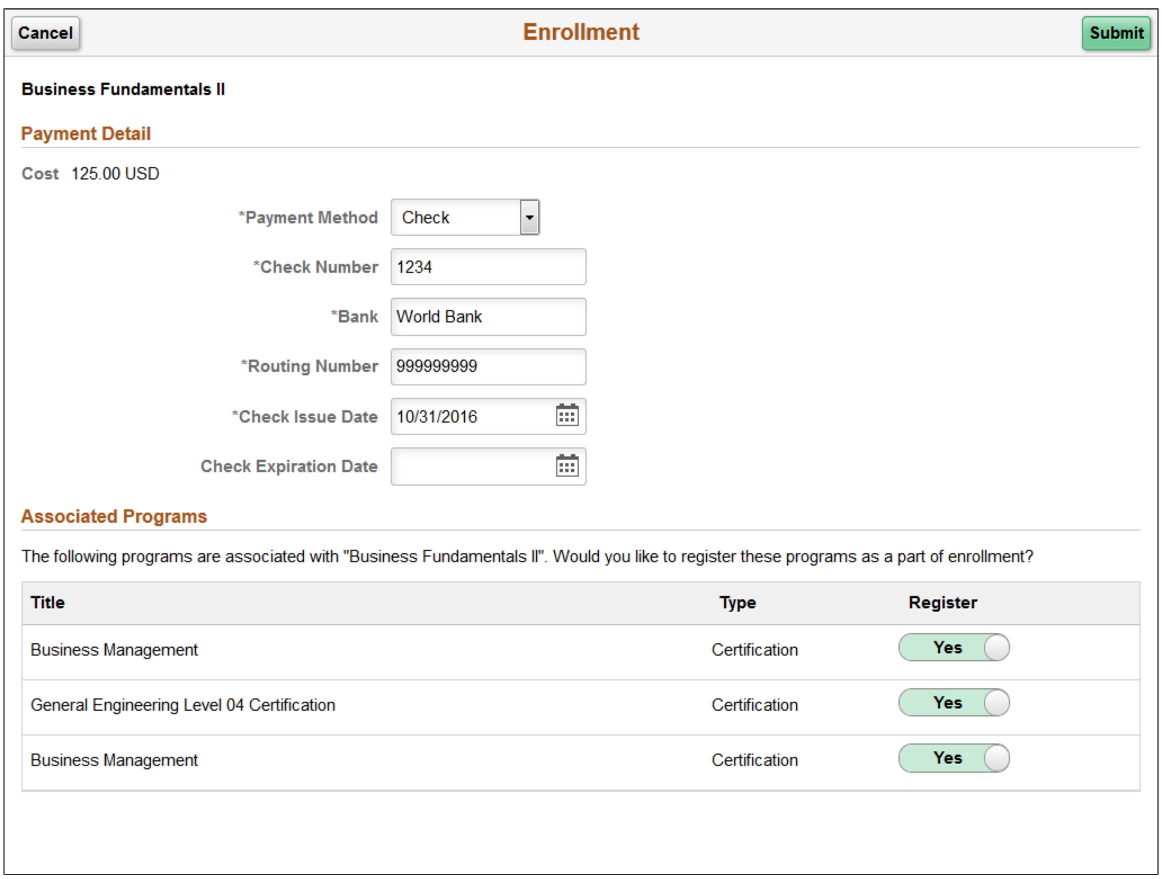
Navigation:

Click the Enroll button on the Course page.

This example illustrates the fields and controls on the Enrollment page for an internal learner.



This example illustrates the fields and controls on the Enrollment page for an external learner.



Note: For internal learners, this page appears after clicking the Enroll button only if the *Auto-Register based on Enrollment* field on the Learning Environment - Defaults Page is set to a value that requires learners to confirm automatic registration.
For external learners, the Payment Detail section of this page appears whenever payment details are required. The Associated Programs section of this page appears for external learners only if the *Auto-Register based on Enrollment* field on the Learning Environment - Defaults Page is set to a value that requires learners to confirm automatic registration.

Job Selection

This section appears only for learners with multiple jobs.

Field or Control	***Description***
Job Title	Select the job for which you want to enroll in the course offering.

Payment Detail

Use this section to select a payment method. The system only displays this section if the requester is an external learner. The payment methods that you can select depend on the setup of the customer organization to which the requester belongs. You can select only one payment method for a learner. The system does not allow partial payment by two different payment method types. You cannot change the payment method after the enrollment or registration is complete.

Field or Control	***Description***
Payment Method	Select a payment method. Values are: *Cash:* Select to pay with cash for the class or program fee. The system handles cash transactions for enrollments or registrations the same way as check transactions, except that you are not prompted to enter any additional information. *ChargeBack:* Select to pay with a chargeback. *Check:* Select to pay with a check. Enter check information in the fields that appear: • **Check Number** • **Bank** • **Routing Number** • **Check Issue Date** • **Check Expiration** *Credit Card:* Select to pay with a credit card. Enter credit card information in the fields that appear: • **First Name** • **Last Name** • **Credit Card Type** • **Credit Card Number** • **Credit Card Expiration Month** • **Credit Card Expiration Year** • **Email Address** • **Country** • **Address Line 1** • **Address Line 2** • **City** • **State** • **Postal Code** *Purchase Order:* Select to pay with a purchase order. Enter a value in the **PO Number** field that appears.

Field or Control	***Description***
	Training Units: Select to pay with training units. Enter a value in the Training Unit Pool Number field that appears.

Associated Programs

Field or Control	***Description***
Registration	Set this switch to *Yes* for each associated program that you want to automatically register for when you submit your enrollment.

Field or Control	***Description***
Submit	Click to submit the enrollment using the payment details and associated programs that you selected.

Offering Details Page

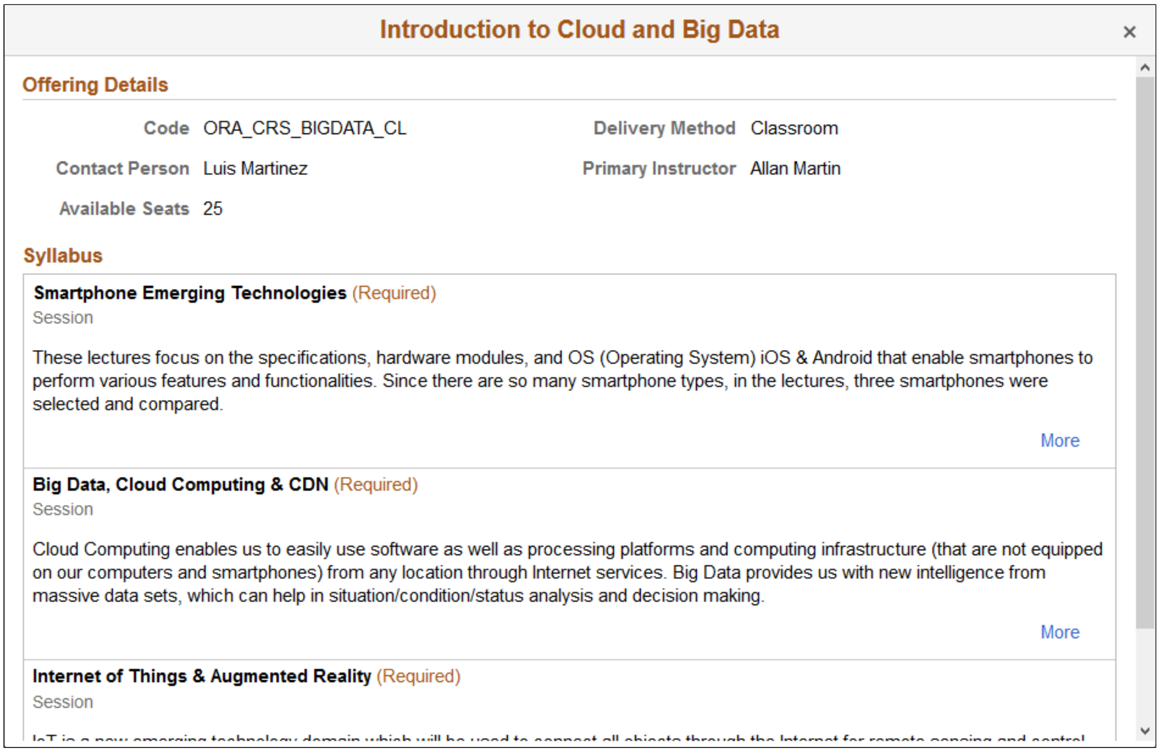
Use the Offering Details page LM_ACT_DETAILS_SCF) to view details for a specific course offering.

Navigation:

Click a course card in the card view of the Find Learning - Course page.

Click the Go button in the grid view of the Find Learning - Course page.

This example illustrates the fields and controls on the Offering Details page.



Offering Details

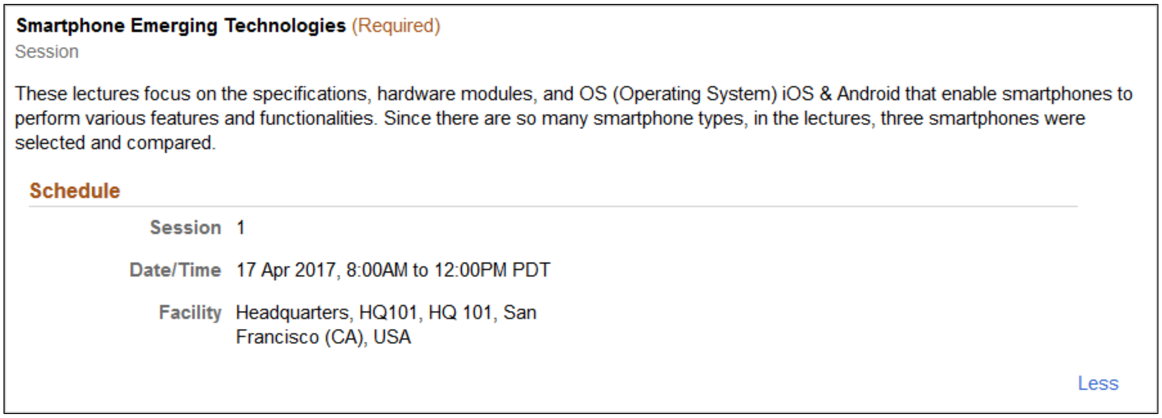
This section displays detailed information about the course offering.

Syllabus

This section displays the learning components for the course offering along with a detailed description.

Field or Control	***Description***
More	Click to view scheduling information for session learning components.

This is an example of an expanded session learning component on the Offering Details page.

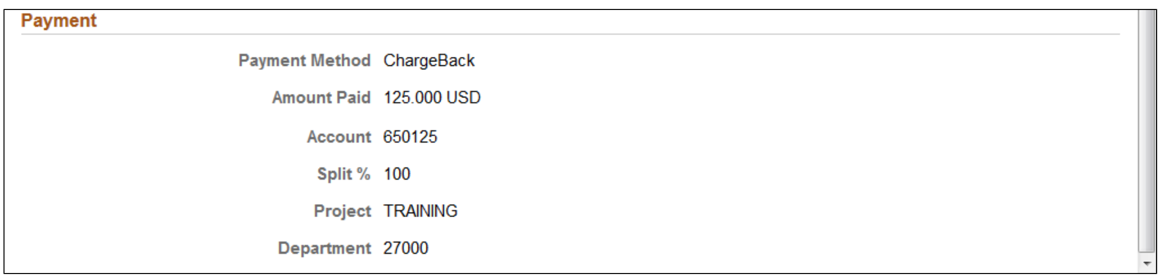


Field or Control	***Description***
View Map	Click this button to view a map of a session's location.

Payment

This section appears only for course offerings in which you are already enrolled. It displays the payment details for the course offering.

This example illustrates the Payment section of the Offering Details page.



Program Page

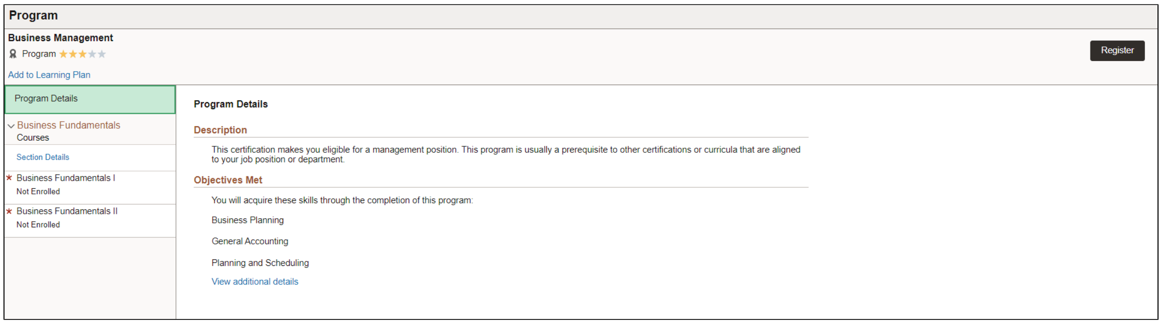
Use the Program page (LM_PRG_DETAIL_FLU) to view details and register for a program

Navigation:

Click a program in the search results of the Find Learning page.

Click a program on the My Courses page.

This example illustrates the fields and controls on the Program page.



Field or Control	***Description***
Add to Plan	Click to add the program to your default learning plan. This action is available only for programs that are not on your learning plan and for which you are not currently registered. If you are registered for the program, this link is replaced with text to indicate that the program is *In-Progress*.
Register	Click this button to register for the program.
Drop	Click to drop the program. **Note:** This action is available only when you access a registered program from the My Learning page. See Managing Learning Using the PeopleSoft Fluid User Interface.

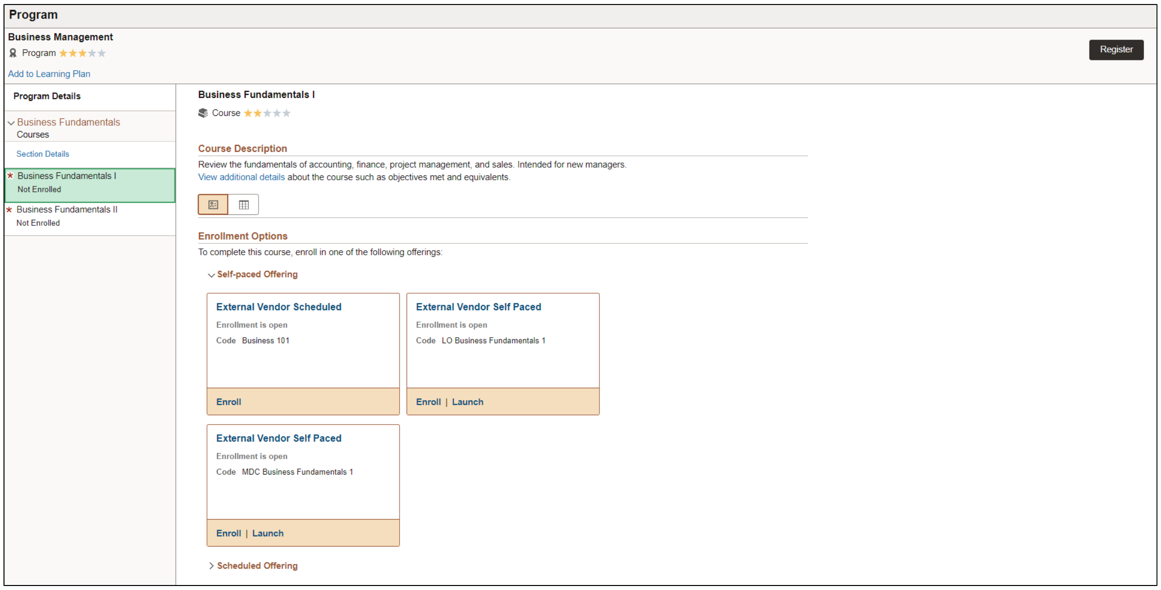
The left pane of the page displays collapsible sections for the program along with the courses that comprise each section.

Field or Control	***Description***
Program Details	Click to display program details in the right pane of the page. **Note:** This information is displayed in the right pane when you first access the page.
View Additional Details	Click to view more information about the program including the program code, price, drop charge, and contact.
Section Details	Click to view detailed information about a section including section requirements and instructions.
Credit Alternatives	Click to view information about alternative methods you can use to receive credit for the course.

Viewing Course Information

Click a course in the left pane to display information about it in the right pane.

This example illustrates how the Program page displays information for a course.



With a course selected in the left pane, the right pane of the page functions exactly the same as the Course page. See the documentation for the Find Learning – Course Page and Find Learning – Details Page.

Managing Learning Using the PeopleSoft Fluid User Interface

This topic describes how to use the PeopleSoft Fluid Interface to manage your current, planned, and completed learning.

Pages Used to Manage Learning

Page Name	***Definition Name***	***Usage***
My Learning Page: Current Tab	LM_MYCOURSES_FL	Manage your current learning.
My Learning Page: Planned Tab	LM_MYCOURSES_FL	Manage your planned learning.
My Learning Page: History Tab	LM_MYCOURSES_FL	Manage your completed learning.
My Course Progress Page	LM_ACT_DTLS_FL	View enrollment information for a course offering.
My Course Progress - Details Page	LM_ACT_DTLS_FL	View detailed course information for an offering.

Page Name	***Definition Name***	***Usage***
Recertification Programs Page	LM_LRNR_RECERT_FLU	Select a recertification program.
<Compliant Content> Page	LM_SCORM_12_FLU	Access compliant content for a course offering.

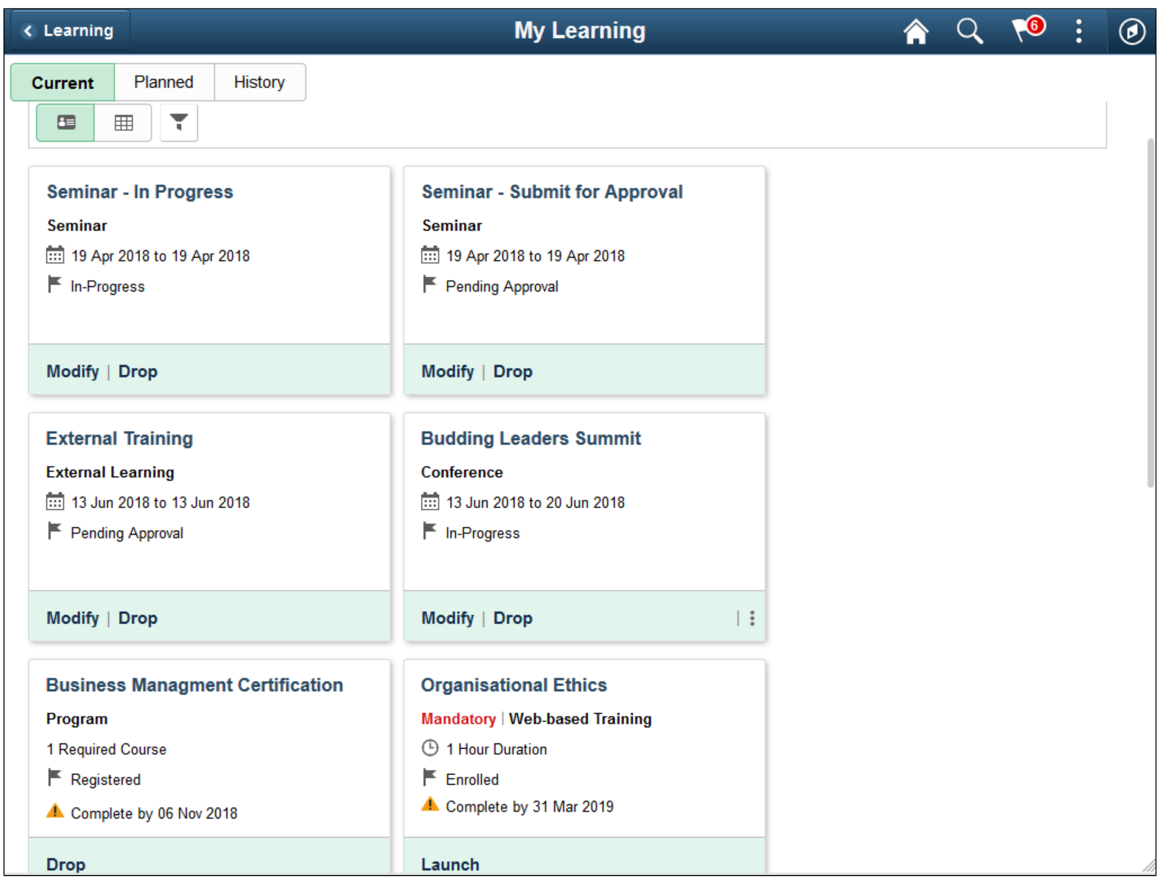
My Learning Page: Current Tab

Use the My Learning page: Current tab (LM_MYCOURSES_FL) to manage your current learning.

Navigation:

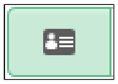
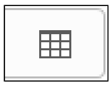
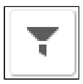
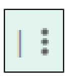
Click the My Learning tile on the Learning dashboard.

This example illustrates the fields and controls on the Card view of the My Learning page: Current tab. You can find definitions for the fields and controls later on this page.

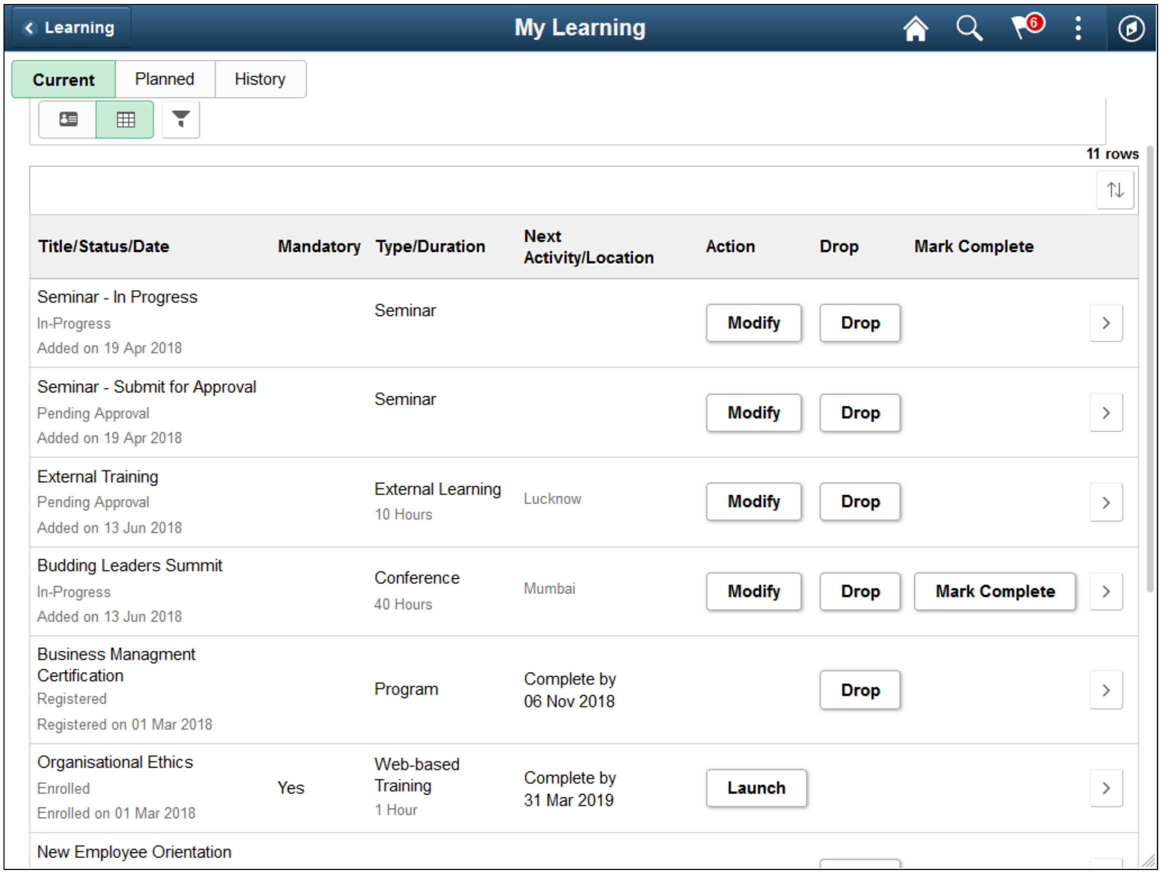


This view of the tab displays cards for all the courses, programs and supplemental learnings in which you are currently enrolled or registered. It also displays your requested courses, programs and supplemental learning that have not yet been approved or declined.

Click a card to access more detailed information for a course, program or supplemental learning. Click a course card to access the My Course Progress Page. Click a program card to access the Program Page. Click a supplemental learning card to access the Add Supplemental Learning page.

Field or Control	***Description***
	Click to access the card view of the My Learning page: Current tab. This is the default view when you access the tab.
	Click to access the grid view of the My Learning page: Current tab.
	Click to open a page where you choose filter criteria for the list of learning. Filter options are: • **Type** • **Complete by** • **Status** • **Mandatory**
	Click and select *Mark Complete* to indicate a supplemental learning as complete from your current learning.

This example illustrates the fields and controls on the Grid view of the My Learning page: Current tab. You can find definitions for the fields and controls later on this page.



This view of the tab displays a grid that lists all the courses, programs and supplemental learnings in which you are currently enrolled or registered.

For each learning item, the tab displays the following information:

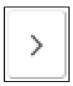
- Title/Status/Date
- Mandatory learning item or not
- Learning type and duration
- Next Activity/Location
- Buttons for actions such as Modify, Launch, Drop and Mark Complete.

In addition, the tab displays the following information if it is defined for the learning:

- Number of required courses (programs only).
- Course duration (courses and supplemental learnings only).

  Note: For supplemental learnings, the course duration can also be displayed.

- Date by which you must complete the learning.

Field or Control	***Description***
Modify	Click to edit the entered data for a program, course or supplemental learning, or to change the status of the learning.
Drop	Click to drop the program, course or supplemental learning.
Launch	Click to launch web-based content for a course. For compliant content, this button opens the <Compliant Content> Page. This link is inactive for courses with a status of *Pending Approval*.
Mark Complete	Click to mark a supplemental learning as complete.
	Click to access more detailed information for a course, program or supplemental learning. Click for a course to access the My Course Progress Page. Click for a program to access the Program Page. Click for a supplemental learning to access the Add Supplemental Learning page.

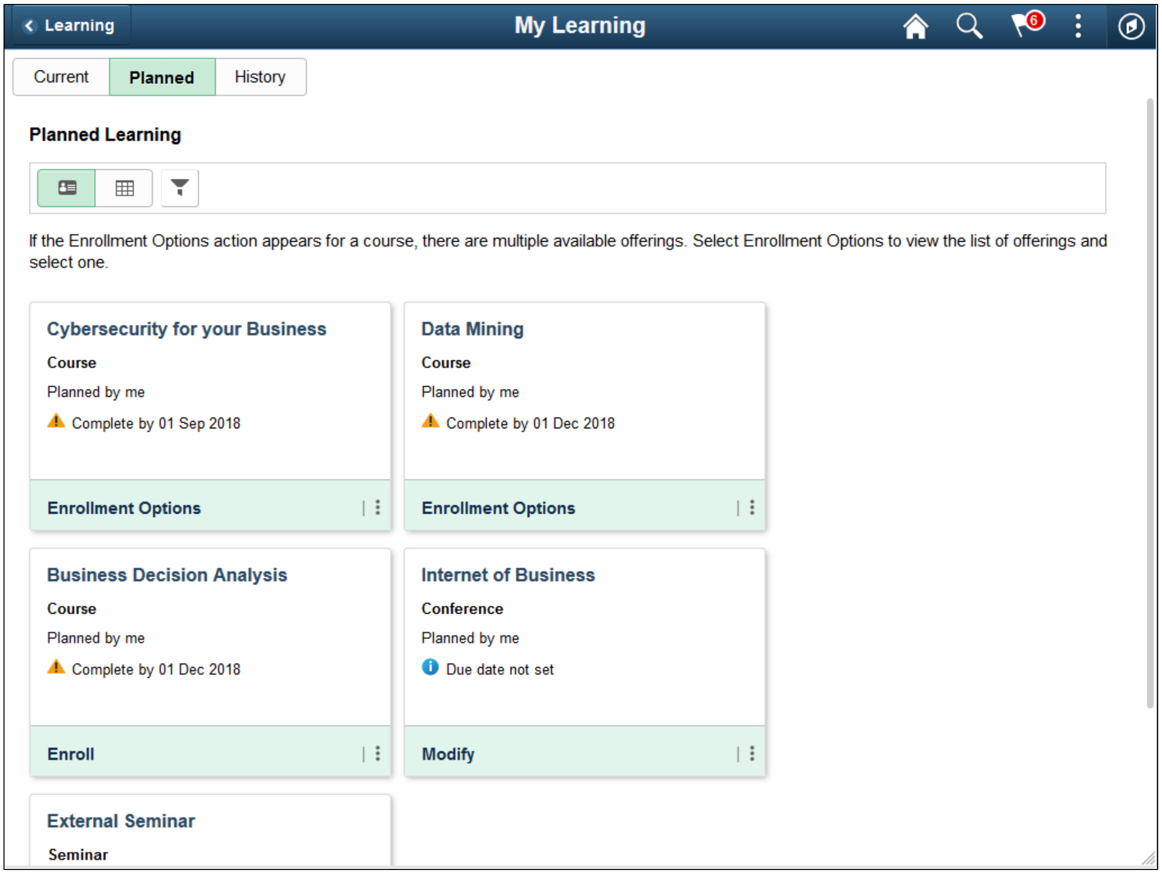
My Learning Page: Planned Tab

Use the My Learning page: Planned tab (LM_CRS_DTL_FL) to manage your planned learning.

Navigation:

Click the Planned tab on the My Learning page.

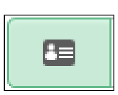
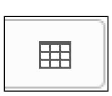
This example illustrates the fields and controls on the Card view of the My Learning page: Planned tab. You can find definitions for the fields and controls later on this page.

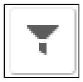
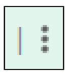


Note: If you have no learning items in your learning plan, this tab displays the **Find Learning** button. Click it to access the Find Learning Page.

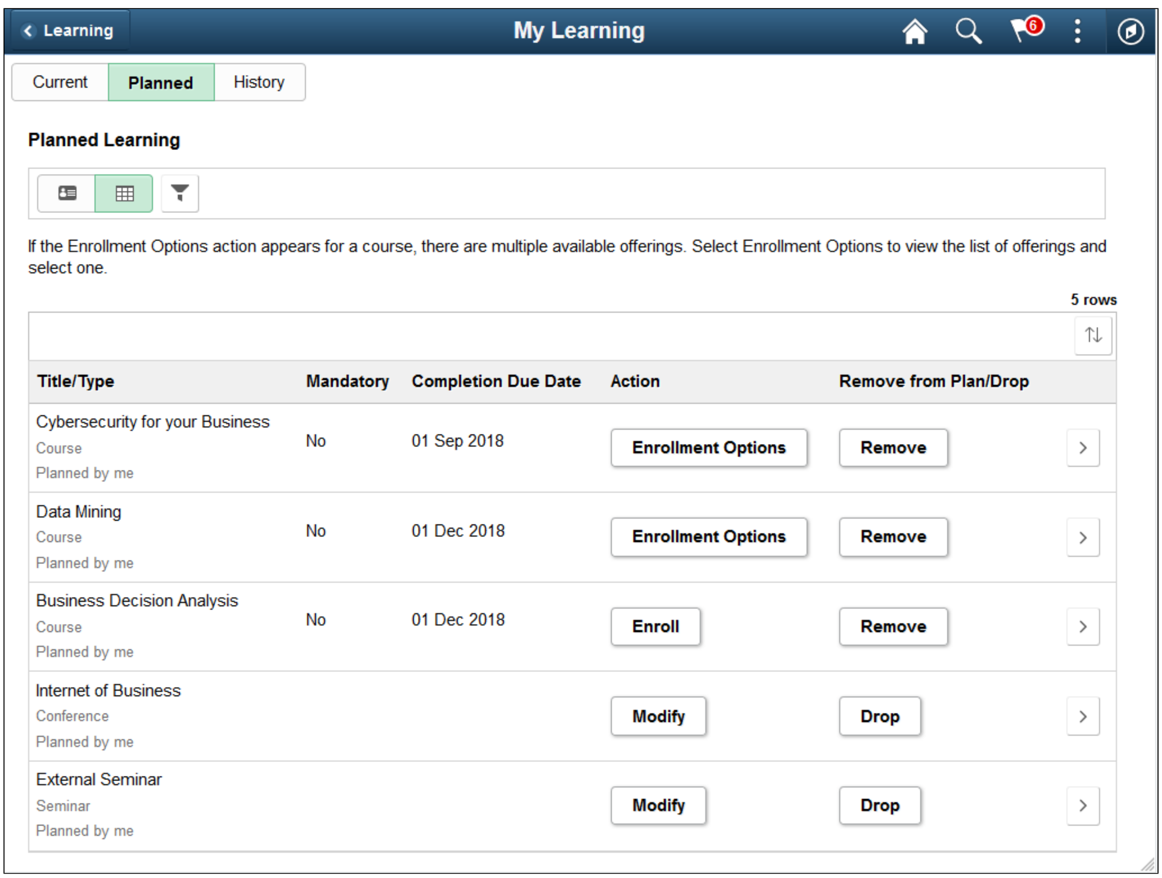
This view of the tab displays cards for the courses, programs and supplemental learnings included on all of your learning plans.

Click a card to access more detailed information for a course, program or supplemental learning. Click a course card to access the My Course Progress Page. Click a program card to access the Program Page. Click a supplemental learning card to access the Add Supplemental Learning page.

Field or Control	***Description***
	Click to access the card view of the My Learning page: Planned tab. This is the default view when you access the tab.
	Click to access the grid view of the My Learning page: Planned tab.

Field or Control	*Description*
	Click to open a page where you choose filter criteria for the list of learning. Filter options are: • **Type** • **Due In** • **Planned by** • **Mandatory**
	Click and select *Remove from Plan* to remove a course, program or supplemental learning from your learning plan.

This example illustrates the fields and controls on the Grid view of the My Learning page: Planned tab. You can find definitions for the fields and controls later on this page.

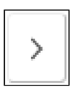


This view of the tab displays a grid that lists the courses, programs or supplemental learnings included on all of your learning plans.

For each learning item, the tab displays the following information:

- Title/Type

- Mandatory learning item or not
- Completion due date
- Buttons for actions, such as Enrollment Options, Enroll, Register, Modify, Remove and Drop.

Field or Control	***Description***
Enroll	This action appears for courses with only one offering. Click the button to enroll in the course offering.
Register	This action appears for programs. Click to register for a program.
Enrollment Options	This action appears for courses with more than one available offering. Click to access the Find Learning – Course Page where you can select the offering that you want to enroll in.
Modify	Click to edit the entered data for a program, course or supplemental learning, or to change the status of the learning.
Drop	Click to drop the program, course or supplemental learning.
Remove	Click to remove a course, program or supplemental learning from your learning plan.
	Click to access more detailed information for a course, program or supplemental learning. Click for a course to access the My Course Progress Page. Click for a program to access the Program Page. Click for a supplemental learning to access the Add Supplemental Learning page.

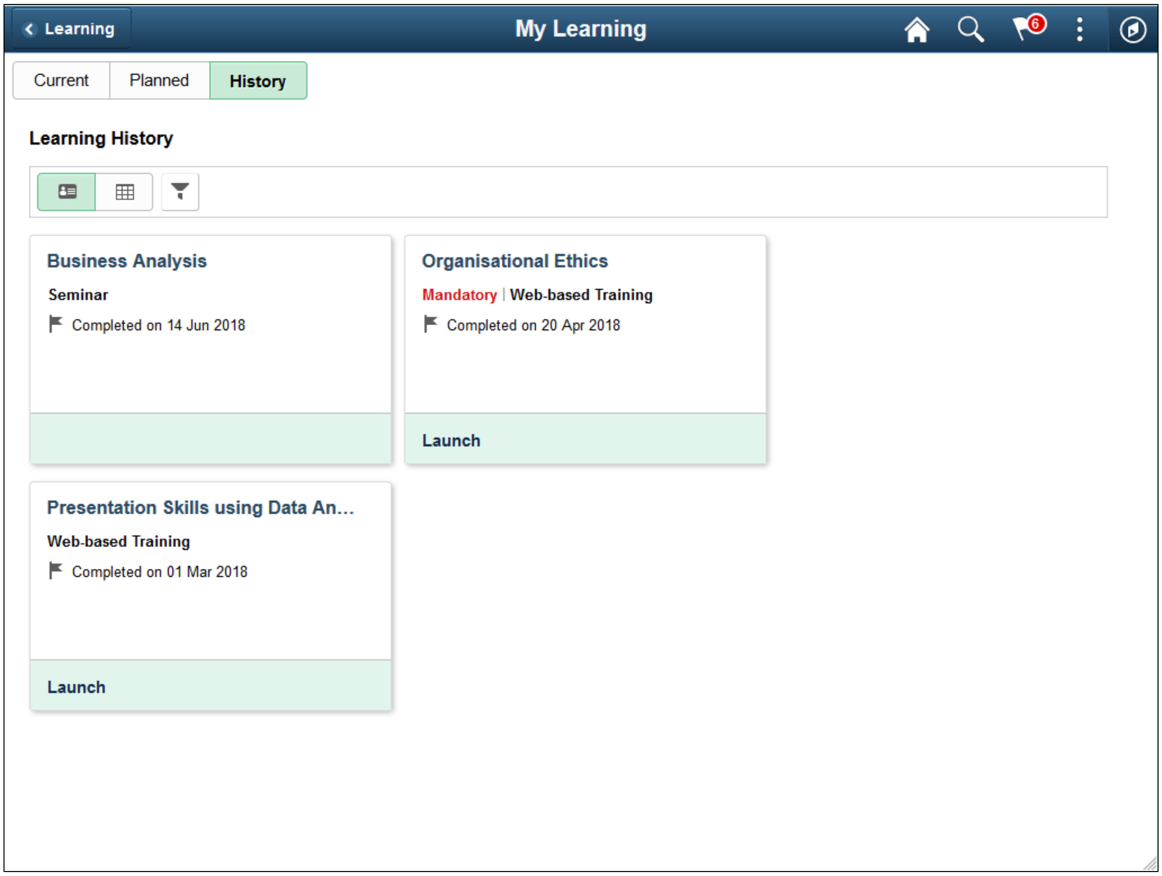
My Learning Page: History Tab

Use the My Learning page: History tab (LM_CRS_DTL_FL) to manage your completed learning.

Navigation:

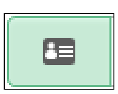
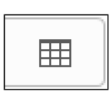
Click the History tab on the My Learning page.

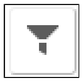
This example illustrates the fields and controls on the Card view of the My Learning page: History tab. You can find definitions for the fields and controls later on this page.



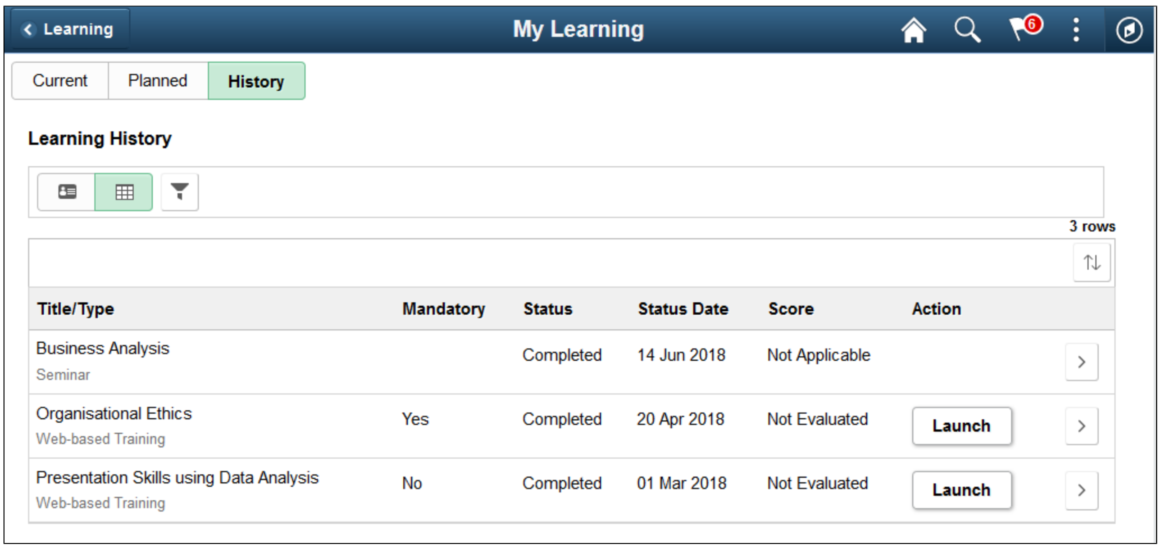
This view of the tab displays a card view of the courses, programs and supplemental learnings that you have completed. Each card displays the following information:

Click a card to access more detailed information for a course, program or supplemental learning. Click a course card to access the My Course Progress Page. Click a program card to access the Program Page. Click a supplemental learning card to access the Add Supplemental Learning page.

Field or Control	***Description***
	Click to access the card view of the My Learning page: History tab. This is the default view when you access the tab.
	Click to access the grid view of the My Learning page: History tab.

Field or Control	***Description***
	Click to open a page where you choose filter criteria for the list of learning. Filter options are: • **Type** • **Completed In** • **Mandatory**

This example illustrates the fields and controls on the Grid view of the My Learning page: History tab. You can find definitions for the fields and controls later on this page.



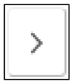
For each learning item, the tab displays the following information:

- Title/type
- Mandatory learning item or not
- Learning status with completion date, if applicable

In addition, the card displays the following information if it is defined for the learning:

- Score (scored courses only)
- Expiration date (certification programs only)

Field or Control	***Description***
Launch	Click to launch web-based content for a course.
Recertify	This action appears only for certification programs that are eligible for recertification. Click it to access the Recertification Programs Page.

Field or Control	***Description***
	Click to access more detailed information for a course, program or supplemental learning. Click for a course to access the My Course Progress Page. Click for a program to access the Program Page. Click for a supplemental learning to access the Add Supplemental Learning page.

My Course Progress Page

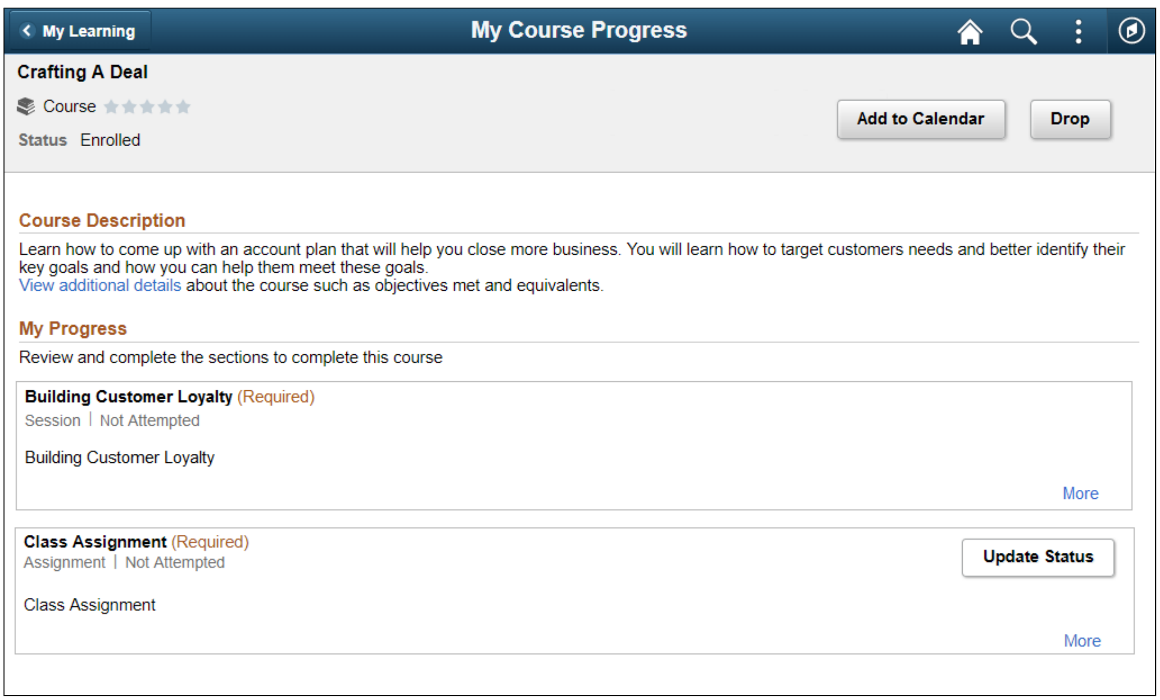
Use the My Course Progress page (LM_ACT_DTLS_FL) to view enrollment information for a course offering.

Navigation:

Click a card or the Go button for a course on the My Learning page.

Click the Go to Course button after enrolling in a course from the Find Learning - Course page.

This example illustrates the fields and controls on the My Course Progress page. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Add to Calendar	This button is available for offerings with upcoming sessions or webcasts. Click it to download a calendar entry for the learning component in .ics format. **Note:** Clicking this button on a device running the iOS operating system accesses the device's calendar application directly.
Drop	Click to drop the course offering.

Course Description

This section displays a short description of the course.

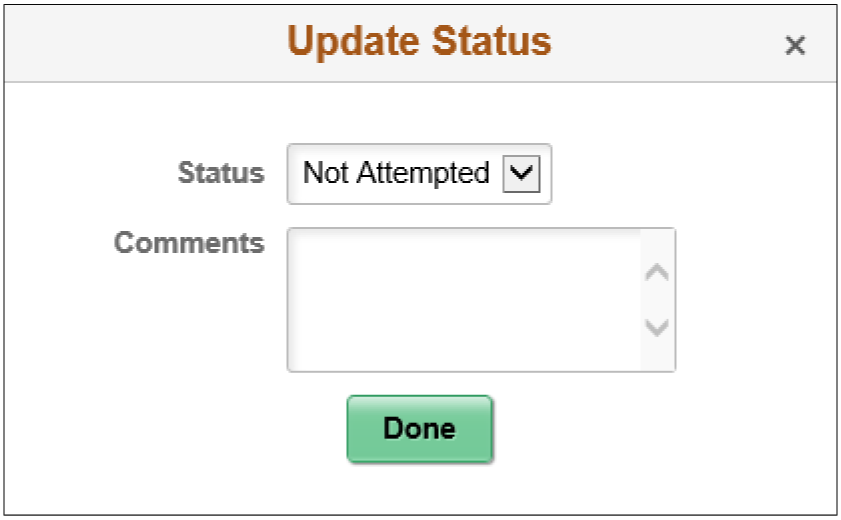
Field or Control	*Description*
View Additional Details	Click to access the My Course Progress - Details Page where you can view more detailed information about the course offering.

My Progress

This section displays the learning components for the course offering.

Field or Control	*Description*
More	Click to expand a learning component to view detailed information about it.
View Map	Click this button to view a map of a session's location.
Launch	Click to launch a survey, test, or web-based learning component.
Update Status	Click to update the status of an Assignment learning component. When you click the **Update Status** button, an **Update Status** pop-up window opens.

This example illustrates the fields and controls on the **Update Status** pop-up window. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Status	Update the status of the Assignment learning component, by selecting a value from the drop down. The available values are: *Completed*, *In-Progress*, *Not Attempted*, and *Not Completed*.
Comments	Enter any additional comments regarding the assignment status chosen.
Done button	Click the **Done** button, to complete updating your assignment status.

When additional security is enforced, user authentication is required from the learner while updating the status of the assignment as completed.

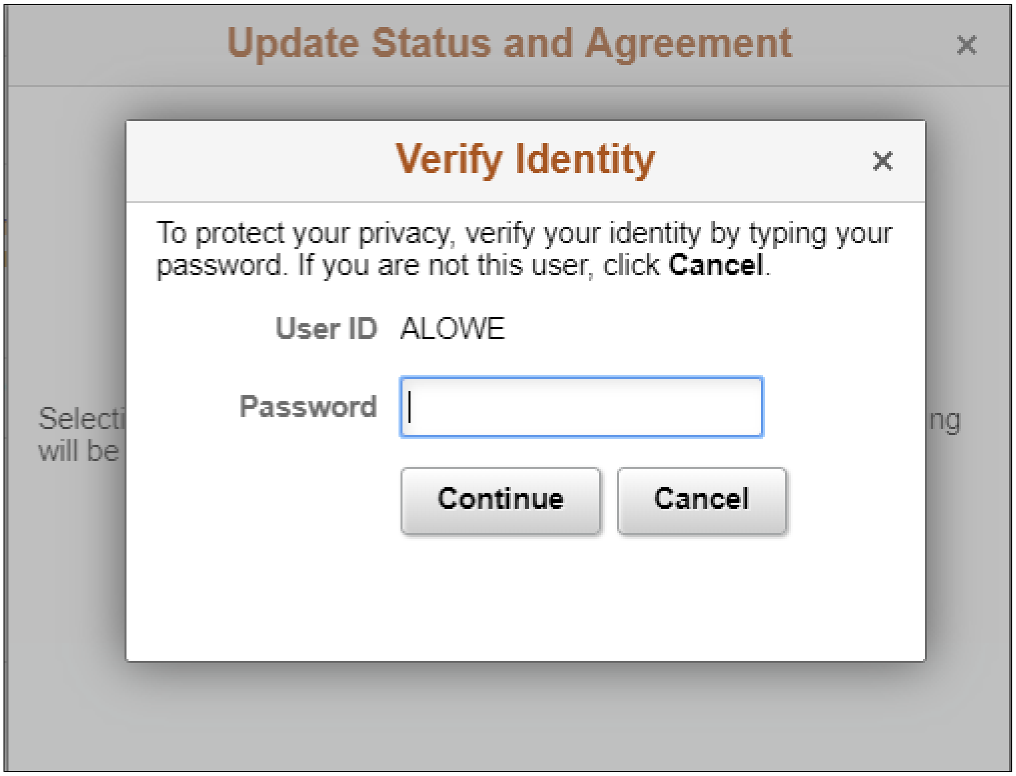
As a result, when you click the **Update Status** button, an **Update Status and Agreement** pop-up window opens. You can select the assignment status (except for *Completed*) and click Done.

When you select the status as **Completed**, the slider becomes active for you to denote your agreement. Click the **Done** button. This opens a **Verify Identity** pop-up window. Enter your password and click the **Continue** button to complete updating the assignment status.

This example illustrates the fields and controls on the **Update Status and Agreement** pop-up window.

Field or Control	***Description***
Comments	Enter any additional comments regarding the assignment status chosen.
I Agree/I Disagree slider	This slider becomes active only when you select the assignment status as *Completed*.
Done	Click the **Done** button to update your status.

This example illustrates the fields and controls on the Verify Identity pop-up window.



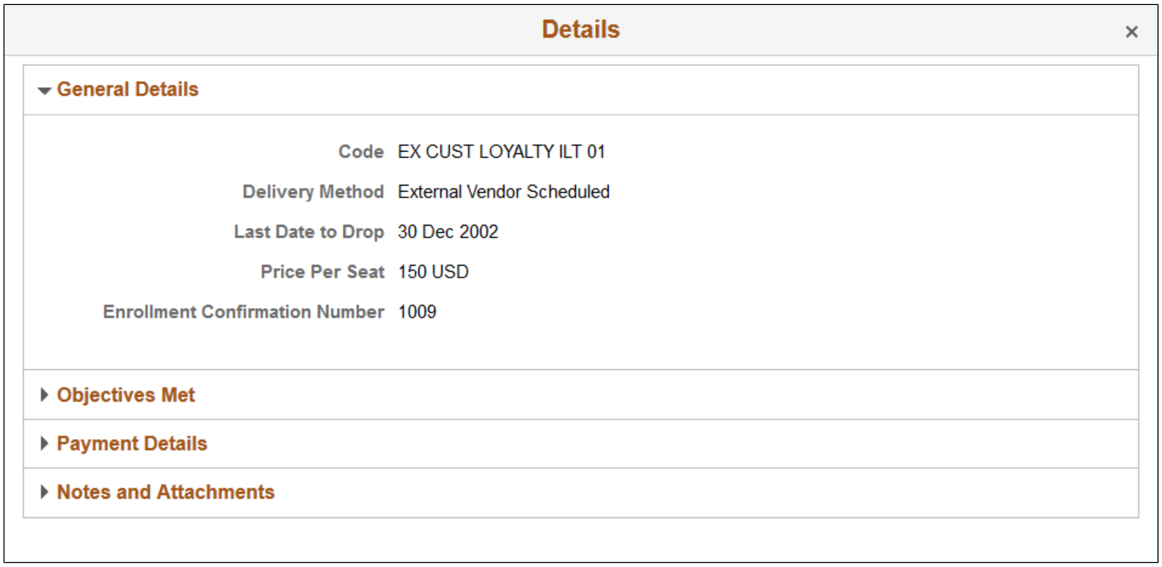
My Course Progress - Details Page

Use the My Course Progress - Details page (LM_ACT_INF_SCF) to view detailed course information for an offering.

Navigation:

Click the View Additional Details link on the My Course Progress page.

This example illustrates the fields and controls on the My Course Progress - Details page. You can find definitions for the fields and controls later on this page.



General Details

This section displays general information for the course offering including its code, delivery method, last date to drop, price per seat, and enrollment confirmation number.

Objectives Met

This section displays the learning objectives met by the course.

Prerequisites

This section displays required or recommended prerequisites for the course.

Equivalents

This section displays equivalent courses or objectives for the course.

Payment Details

This section displays payment information for the course.

Notes and Attachments

This section displays notes and attachments associated with the course.

Recertification Programs Page

Use the Recertification Programs page (LM_LRNR_RECERT_FLU) to select a recertification program.

Navigation:

Click the Recertify link on the My Learning page: History tab.

This example illustrates the fields and controls on the Recertification Programs page. You can find definitions for the fields and controls later on this page.

This page displays a list of recertification programs available for a completed certification program. Click a program to access the Program Page where you can view more details about the program and register for it.

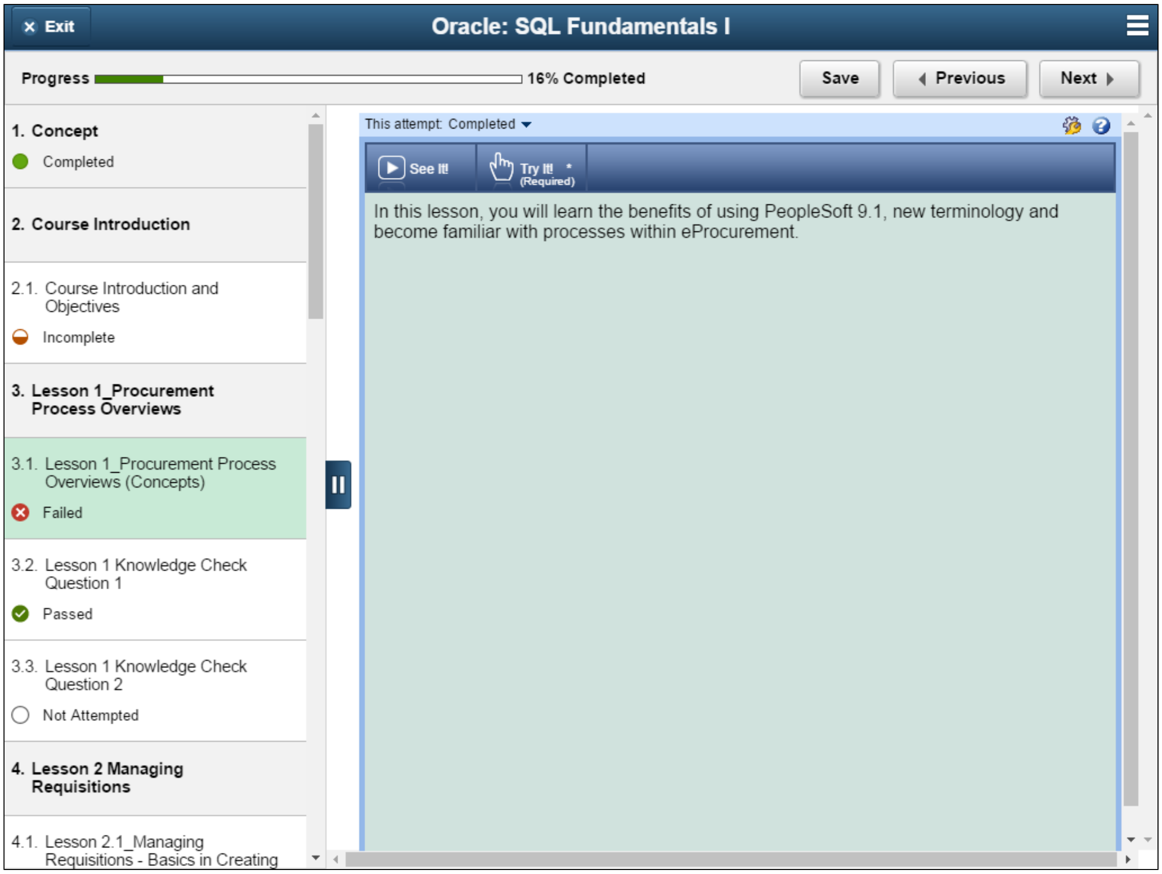
<Compliant Content> Page

Use the <Compliant Content> page (LM_SCORM_12_FLU) to access compliant content for a class.

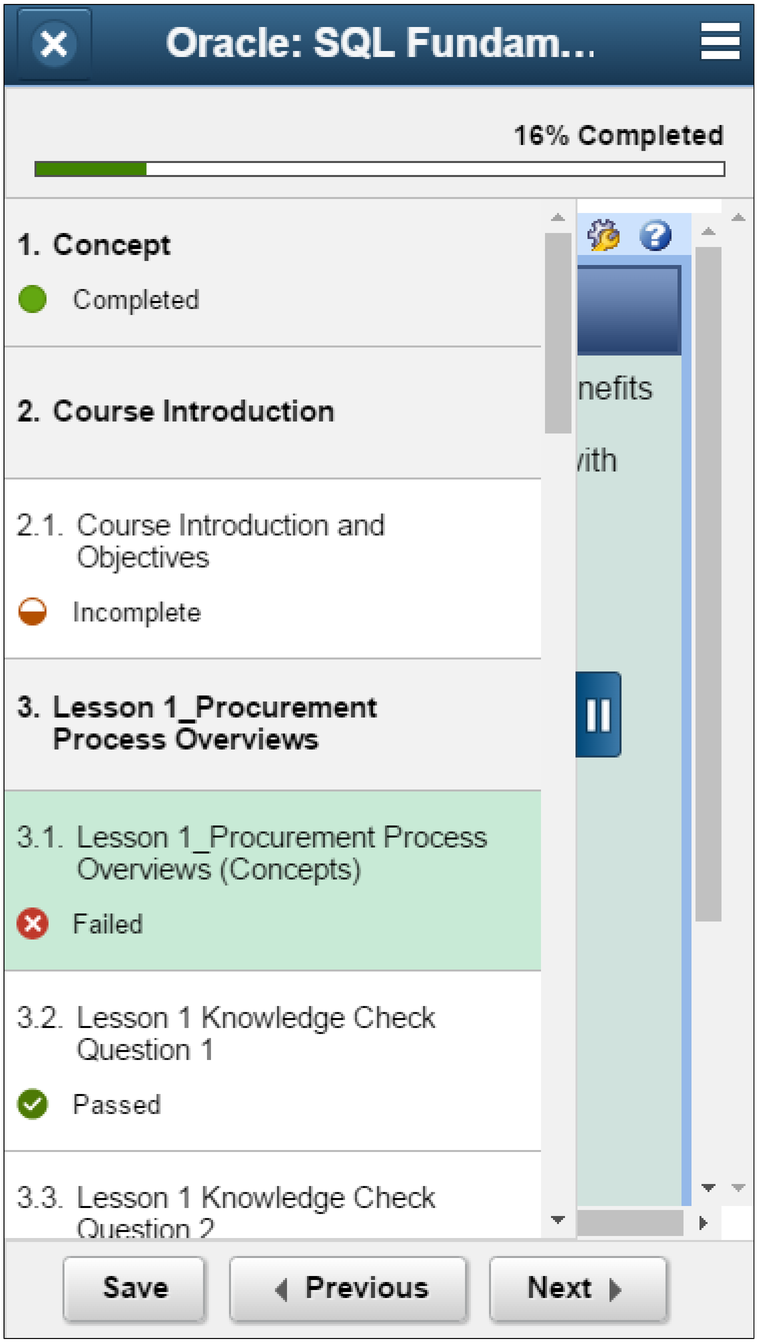
Navigation:

Click the Launch button on the My Learning or Find Learning - Course page for a course offering with compliant content.

This example illustrates the fields and controls on the (Tablet) <Compliant Content> page. You can find definitions for the fields and controls later on this page.



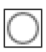
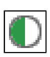
This example illustrates the fields and controls on the (Smartphone) <Compliant Content> page. You can find definitions for the fields and controls later on this page.



Term	***Definition***
Exit	Click this button to return to the Current Enrollments or Class page.

Term	*Definition*
Progress	This bar displays the percentage of the class that the learner has completed. The system calculates this percentage based on all chapters and sub-chapters for the class that have a status. The system considers Passed, Failed, and Completed statuses as complete for the purposes of calculating class progress. The progress bar appears only if there is more than one chapter in the content. **Note:** If the learning component's overall status is set to Completed, the Progress bar shows a completion percentage of 100% regardless of how many chapters have a status of Completed, Passed, and Failed.

The collapsible left panel of this page displays the chapters and subchapters for the compliant content. The system displays the current status of each chapter and subchapter that contains compliant content. Status values are:

Term	*Definition*
	Not Attempted Unknown (SCORM 2004 only)
	Incomplete
	In Progress
	Browsed
	Completed
	Passed **Note:** If a score is associated with passing a chapter or subchapter the system displays it next to this icon.
	Failed

Click an item in the left panel to display its associated content in the right panel.

Term	***Definition***
Save	Click this button to refresh the status and score of the chapters and subchapters for the compliant content. In addition, if the **Bookmark Tracking Enabled** check box is selected on the Content Page, clicking this button saves the learner's current location in the compliant content.
Previous, **Next**, and **Finish**	Click these buttons to move back and forth between different chapters and subchapters. For the last chapter or subchapter of content, this button appears instead of the **Next** button. Click it to save the completed compliant content and return to the previous page from which you launched the content.

Using the PeopleSoft Fluid Interface To Manage Plans

This topic describes how to use the PeopleSoft Fluid Interface to add and review learning plans for the learner.

Pages Used to Manage Plans Using the PeopleSoft Fluid User Interface

This section discusses on the pages used to manage learning plans.

Page Name	***Definition Name***	***Usage***
Manage Plans	LM_LRNR_PLANS_FL	Review the current and completed learning plans of the learner.

User Access

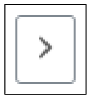
User Role	***Access***
Learning Manager Fluid	Provides manager with the access to Manage Plans page for the team.
Learning Employee Fluid	Provides learner with the access to Manage Plans page.

Manage Plans

Use the Manage Plans (LM_LRNR_PLANS_FL) page to manage the learning plans for the learner.

Navigation:

- As a Manager:

  1. **Manager Self Service** > **Manage Team Plans** > **Review All Plans**
  2. Search your team member from the **Team Members** page.
  3. Select the  button for the corresponding team member row, to go to the **Manage Plans**.

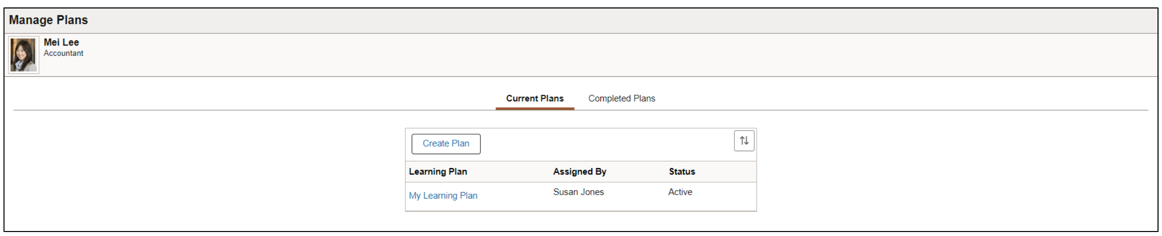
- As a Learner:

  Employee Self Service > **Learning** > **Manage Plans**

This page allows the user to review the learning plans (current and completed) for the learner. The user can be a manager or a learner.

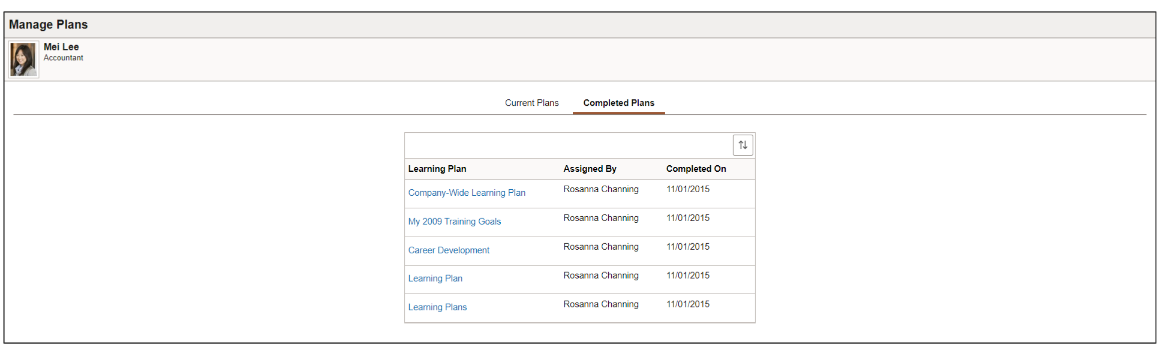
Use the **Current Plans** page to view the ongoing learning plans for the learner, see who assigned the learning plan, and the plan status. You can also create learning plans.

This example illustrates the fields and controls on the Manage Plans page (Current Plans Tab).

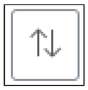
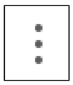


The **Completed Plans** tab displays the learning plans that are completed by the learner.

This example illustrates the fields and controls on the Manage Plans page (Completed Plans Tab).



Field or Control	***Description***
Create Plan	Click to create a learning plan.
Learning Plan name	Click to open the Learning Plan Details page.

Field or Control	***Description***
	Click to sort the rows by Learning Plan Name, Assigned By, or Learning Plan Status. A colored sort icon button indicates that you have specified one of these grid sorts.
Learning Plan row	Displays the learning plans for the learner. Use **Current Plans** tab to view the ongoing learning plans and **Completed Plans** tab to view the completed learning plans. Each row displays the learning plan name, assigned by, and status. **Create Plan** is available only under **Current Plans** tab.
	Click to mark the learning plan as active, inactive or complete. This is applicable for learners through self service.

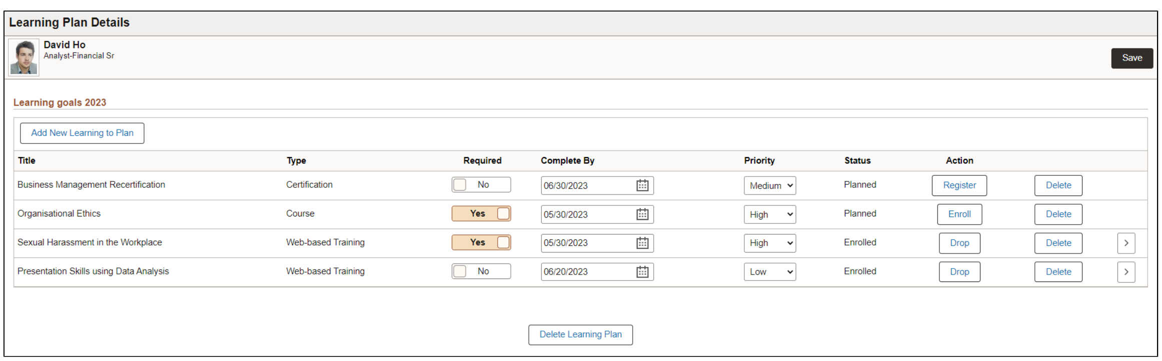
Learning Plan Details

Use the Learning Plan Details page (LM_LPLN_DTLS_FL) to view the details of the learning plan for the learner.

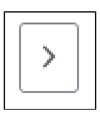
Navigation:

Navigate to Manage Plans and select a learning plan to view the details.

This example illustrates the fields and controls on the Learning Plan Details Page.



This page displays all the learning items associated with the learning plan. You can add learnings to the plan and register or enroll to the learnings, delete or modify the plans. You can also create a new learning plan.

Field or Control	***Description***
Add New Learning to Plan	Click to open the three step activity guide (AG) for Add Learning to Plan and associate learnings to the plan for the selected team member. On save, the user is taken back to the **Learning Plan Details** page of the learner. The steps include *Find Learning*, *Select Priority and Completion*, and *Review and Confirm*. To know more, see Using the PeopleSoft Fluid Interface To Manage Team Plans.
Learning items row	Each row displays the name of the learning, type, if learning is required, complete by, priority, learning status and related actions for the learning. Based on the learning type and status, the available actions vary.
Delete Learning Plan	Delete the learning plan.
Register	Register the learner to the program associated with the learning plan.
Enroll	Enroll the learner to an available class for the course associated with the learning plan.
Modify	Modify the supplemental learning details.
Drop	Drop the learner from the learning.
Delete	Delete the learning from the learning plan. This option is not available for Supplemental learning type.
	Click to view the progress of the learning item.

Related Links

Using the PeopleSoft Fluid User Interface for Employee Learning Self-Service
Learning Dashboard
Using the PeopleSoft Fluid User Interface for Manager Self-Service
Using the PeopleSoft Fluid Interface For Team Learning

Using the PeopleSoft Fluid Interface To Manage Objectives

This topic describes how to use the PeopleSoft Fluid Interface to manage objectives for a learner.

Pages Used to Manage Objectives Using the PeopleSoft Fluid User Interface

This section discusses on the pages used to manage learning objectives.

Page Name	***Definition Name***	***Usage***
Manage Objectives	LM_OBJV_MGR_FL	Manage the learning objectives for the learner.

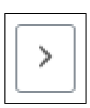
User Access

User Role	***Access***
Learning Manager Fluid	Provides manager with the access to Manage Objectives page for the team.
Learning Employee Fluid	Provides learner with the access to Manage Objectives page.

Manage Objectives Page

Use the Manage Objectives page (LM_OBJV_MGR_FL) to manage the learning objectives for the learner.

Navigation:

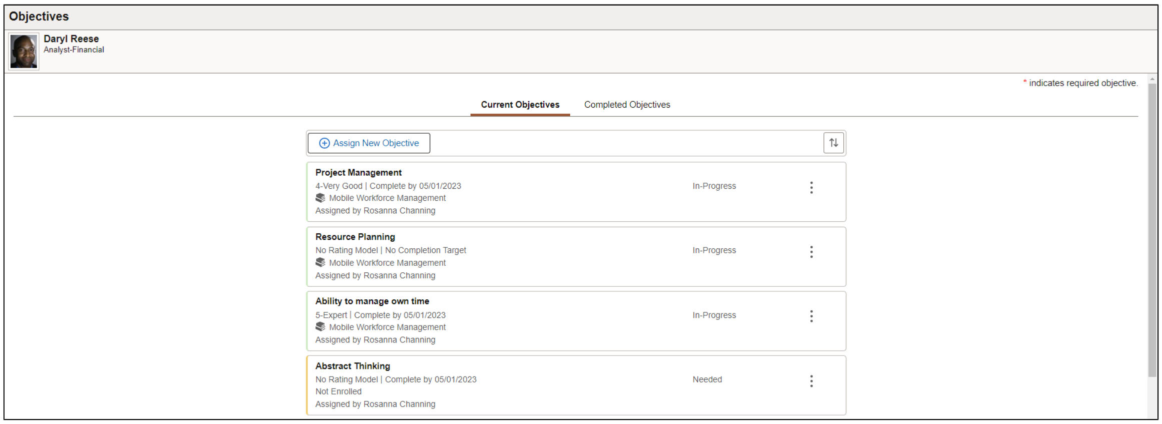
- As a Manager:
  1. **Manager Self Service** > **Manage Team Objectives** > **Review All Objectives**
  2. Search your team member from the **Team Members** page.
  3. Select the  button for the corresponding team member row, to go to the **Objectives** page.
- As a Learner:

  Employee Self Service > **Learning** > **Manage Objectives**

This page allows the user to review the learning objectives (current and completed) for the learner. The user can be a manager or a learner. Based on the user, the page title is **My Learning Objectives** (for learner) and **Objectives** (for manager) respectively.

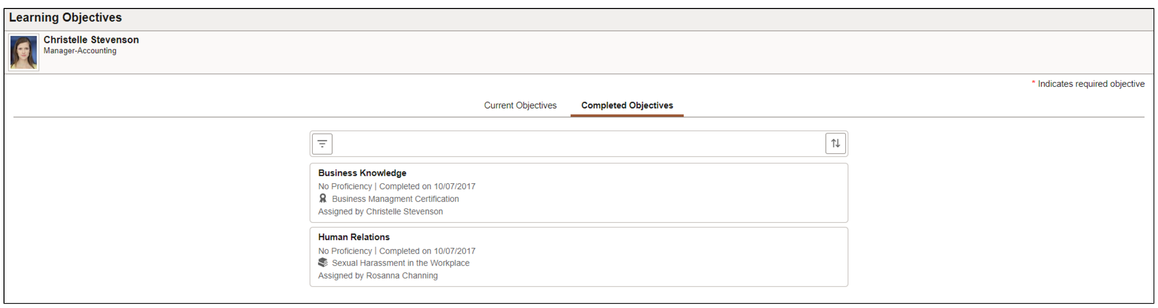
Use the **Current Objectives** page to view the ongoing objectives for the learner, see who assigned the objective, delete or modify objectives, and search for learnings that satisfy the objectives and register or enroll the learner to the learning (The Assigned By field identifies the source of the assignment, which can be a person or a system.). You can also assign a new objective. If the user is a manager, then he can view the learning progress of his direct reports (team members) and team members of their directs (one level only).

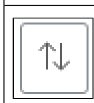
This example illustrates the fields and controls on the Objectives page (Current Objectives Tab).

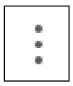
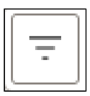


The **Completed Objectives** tab displays the objectives that are completed by the learner.

This example illustrates the fields and controls on the Objectives page (Completed Objectives Tab).

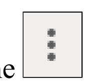


Field or Control	***Description***
Assign New Objective	Click to open the three step activity guide (AG) for Assign New Objective and assign objectives for the learner. On save, the user is taken back to the **Objectives** page. The steps include *Select Objectives*, *Select Date and Proficiency*, and *Review and Confirm*. To know more on the AG steps, see Assign Objectives.
	Click to sort the rows by Objective Name, Proficiency, Target Completion Date, Learner Objective Status, Learning Name, or Assigned By. A colored sort icon button indicates that you have specified one of these grid sorts.

Field or Control	*Description*
Objectives row	Displays the objectives in card layout for the learner. Use **Current Objectives** tab to view the ongoing objectives and **Completed Objectives** tab to view the completed objectives. Each card displays the objective name, proficiency, target completion date, learning name, and assigned by. For Current Objectives, the card displays the status of the objective. This includes *Needed* and *In-Progress*. Based on the status, related actions are available for the user.
 or Related actions	User can perform the following related actions based on the status of the learning objective: • View Objective Details • View Learning Progress • Delete • Enroll / Register • Modify
	Click to filter objectives by objective name, proficiency, completed in, and required. This option is available only for completed objectives.

Related Actions

The My Learning Objectives (for learner) or the Objectives (for manager) page allows the user (manager or learner) to perform different actions based on the status of the learning objective.

Navigate to the Manage Objectives Page page and click the  button for any objective to view the related actions.

The user can perform the following actions:

- View Objective Details
- View Learning Progress
- Delete
- Enroll / Register
- Modify

Field or Control	***Description***
View Objective Details	Click to view the details of the objective in a modal window. Details include the objective name, code, rating model (if any), description, the learnings that meet the objective, and the rating for the learning.This action is available for both *Needed* and *In-Progress* status.
View Learning Progress	Click to view the details and the progress of the learning (course or program) that meets the objective. This action is available when the status of the objectives is *In-Progress*.
Delete	Click to delete the objective for the learner. System displays a warning to confirm the delete action. This action is available when the status of the objective is *Needed*. **Note:** The managers can only delete the objectives that are assigned by them.
Enroll / Register	Click to go to the Find Learning page, search for learnings that fulfill the assigned objectives and enroll or register in suitable classes or programs. By default, the Find Learning page displays only the courses or programs that are associated with the objective. The user can only search from the learnings associated with the objective. This action is available when the status of the objective is *Needed*. If the selected learning is a course, the user can view the course details page and enroll to a preferred class. If the selected learning is a program, the user can view the program details and register to the program. However, the user cannot enroll the learner in a course under the program. At a time, the user can enroll the learner to only one learning. To know more on how to search for and enroll in a learning, see Add Learning – By Team Members.
Modify	Click to update the details of the objective such as Required, Review Rating and Target Completion Date. This action is available for objectives with status *Needed*.

Related Links

Using the PeopleSoft Fluid User Interface for Employee Learning Self-Service
Learning Dashboard
Using the PeopleSoft Fluid User Interface for Manager Self-Service
Using the PeopleSoft Fluid Interface For Team Learning

Using the PeopleSoft Fluid User Interface for Manager Self-Service

This topic discusses the PeopleSoft Fluid User Interface pages for manager self-service.

Pages Used to Perform Manager Self-Service Using the PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Manager Self Service Homepage	LM_HR_MGR_SELF_SERVICE_FLU_GBL (cref for the page)	Access manager self-service transactions.
Approvals Tile (Fluid Approvals) Approvals Tile (MAP Approvals)	HMAP_APPR_TILE_FL	Review pending and historical approval requests that are associated with the logged-in user.
Learning Insights Tile	LM_KIB_MGR_INSIGHTS_LNK_FL	Access the insights for Team Learning, Team Certification, Learning by Manager and Certifications by Manager.
Team Learning Tile	LM_MSS_TILE_FLU	Access a collection of frequently-used team learning management components.
Learning Compliance Tile	LM_PG_FLU	Access the Learning Compliance page. This tile does not display any learning data.
Manage Team Objectives	LM_MGR_LRN_OBJ_FL	Access the Manage Team Objectives page for your team.
Manage Team Plans	LM_MGR_LRN_PLAN_FL	Access the Manage Team Plans page for your team.

User Access

User Role	***Access***
Learning Manager Fluid	Provides access to the Manage Self Service Homepage.

Manager Self Service Homepage

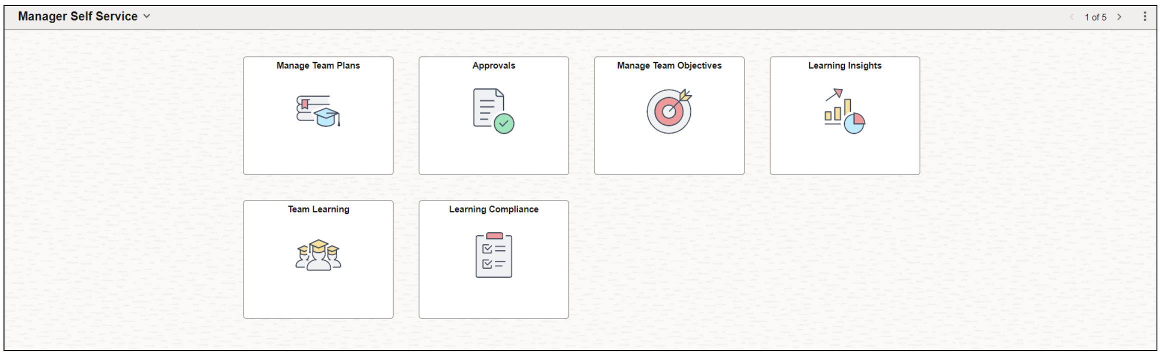
Use the Manager Self-Service homepage to access manager self-service transactions. The cref for this page is LM_HR_MGR_SELF_SERVICE_FLU_GBL.

Navigation:

On a mobile device, the fluid home appears when you first sign in. On a desktop or laptop, access the fluid home by selecting **Fluid Home** under the main menu. The default homepage title appears at the top of the homepage.

If the Manager Self-Service homepage is not your default homepage, click the title of the default homepage and select Manager Self-Service from the list that appears.

This example illustrates the Manager Self Service homepage.



Field or Control	***Description***
Approvals	Click to review pending and historical approval requests.
Learning Compliance	Click to view a pivot grid of learner statuses for a particular class, course, or program that you choose.
Learning Insights Tile	Click to access the analytics for team learning and learning certification.
Team Learning	Click to access a collection of frequently-used team learning management components.
Manage Team Objectives	Click to access the Manage Team Objectives homepage.
Manage Team Plans	Click to access the Manage Team Plans homepage.

Approvals Tile

Use the Approvals tile (HMAP_APPR_TILE_FL) to review pending and historical approval requests that are associated with the logged-in manager.

Navigation:

Manager Self Service > **Approvals**

This example illustrates the Approvals tile.

The tile shows the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

Click the tile to access the Pending Approvals and Approvals History pages without using traditional menu navigation to review and approve different transactions.

The Approvals pages support approvals that use AWE.

To access the Pending Approvals page, see Using PeopleSoft Fluid User Interface Self-Service Approval Transactions.

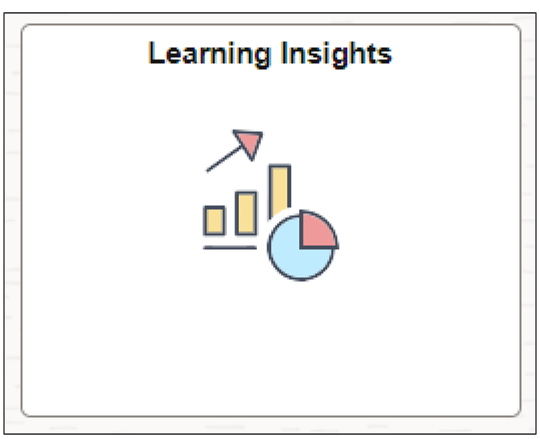
Learning Insights Tile

Use the Learning Insights tile to access the Insights dashboard.

Navigation:

Manager Self Service > **Learning Insights**

This example illustrates the fields and controls on the Learning Insights tile.



For more information on Insights home page, see Insights Home page.

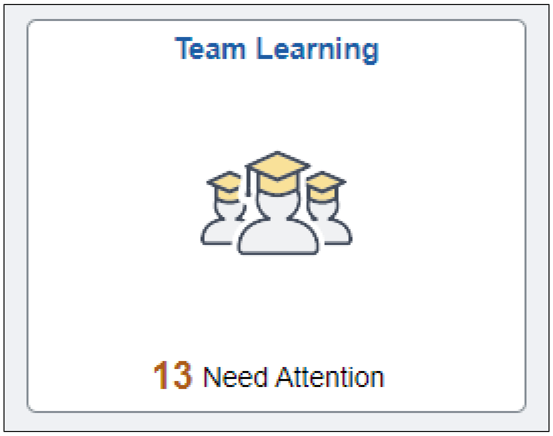
Team Learning Tile

Managers use the Team Learning tile (LM_MSS_TILE_FLU) to access a collection of frequently-used team learning management components.

Navigation:

Manager Self Service > **Team Learning**

This example illustrates the Team Learning tile.



Click tile to access the Team Learning Page. The tile displays the count of overdue and expired learnings (if applicable).

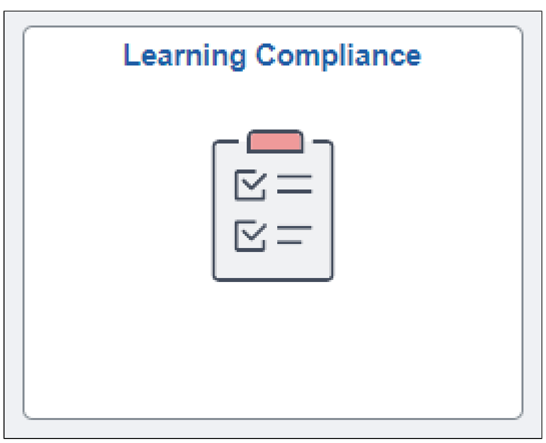
Learning Compliance Tile

Use the Learning Compliance tile (LM_PG_FLU) to view a pivot grid of learner statuses for a particular class, course, or program that you choose.

Navigation:

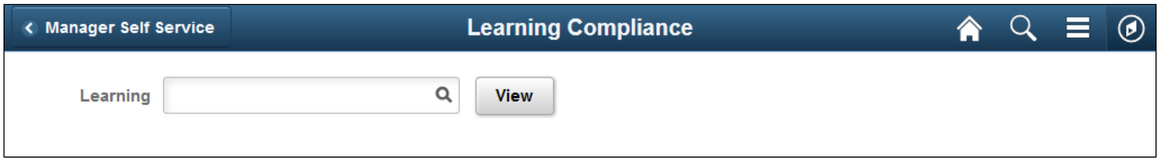
Manager Self Service > **Learning Compliance**

This example illustrates the Learning Compliance tile.

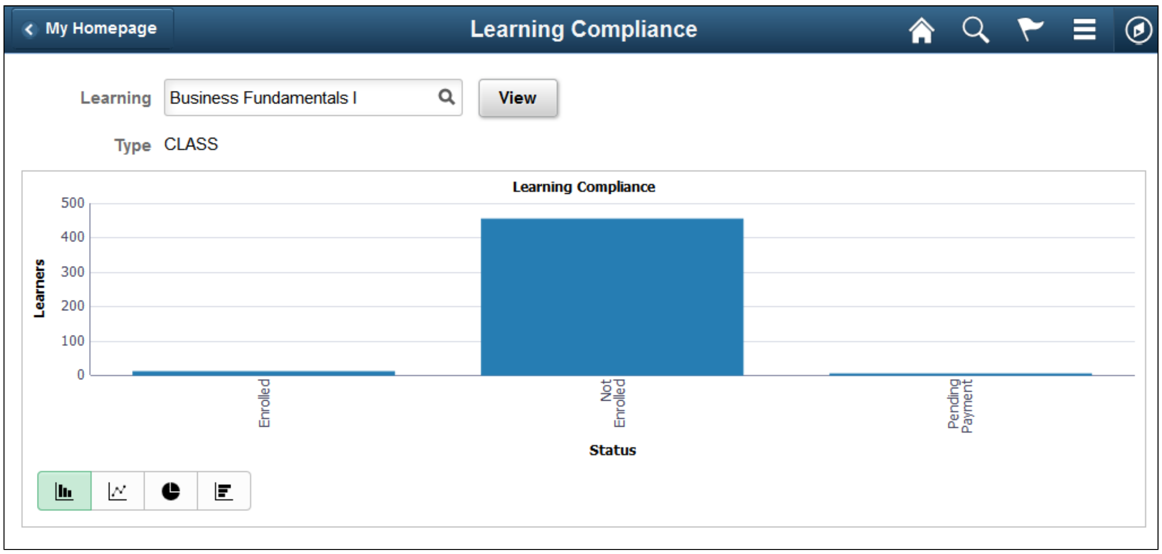


Click tile to access the Learning Compliance page. When the page is loaded initially, the manager has to select a learning to view the pivot grid. The page shows data for one learning at a time.

This example illustrates the Learning Compliance page as it initially appears. No pivot grid appears until the user selects a learning item and clicks the View button.



This example illustrates the Learning Compliance page with a pivot grid.



The pivot grid on this page is the same as the one that is accessed from the Learning Compliance Pagelet.

Manage Team Objectives Tile

Use the Manage Team Objectives tile (LM_MGR_LRN_OBJ_FL) to access the learning objectives for your team.

Navigation

Manager Self Service > **Manage Team Objectives**

This example illustrates the Manage Team Objectives tile.

Click tile to access the Manage Team Objectives Page homepage.

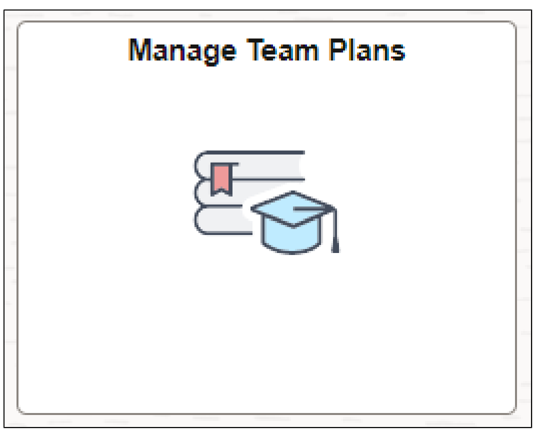
Manage Team Plans Tile

Use the Manage Team Plans tile (LM_MGR_LRN_PLAN_FL) to access the learning plans for your team.

Navigation

Manager Self Service > **Manage Team Plans**

This example illustrates the Manage Team Plans tile.



Click tile to access the Manage Plans Page homepage.

Approving Learning Transactions Using Fluid Approvals

This topic describes how to approve learning transactions using Fluid Approvals.

See also Using PeopleSoft Fluid User Interface Self-Service Approval Transactions.

Pages Used to Approve Learning Transactions Using Fluid Approvals

Page Name	***Definition Name***	***Usage***
Pending Approvals - Class Enrollment Page	EOAWMA_TXNHDTL_FL	Approve a class enrollment request.
Class Information Page	LM_ITM_DTL1_FL	View additional information about a class.
Scheduled Sessions Page	LM_SES_DTL1_FL	View the scheduled sessions for a class.
Pending Approvals - Program Registration Page	EOAWMA_TXNHDTL_FL	Approve a program registration request.
Program Information Page	LM_PROG_DTL1_FL	View additional information about a program.
Section Requirements Page	LM_PRG_SCN1_FL	View the section requirements for a program.
Pending Approvals - Supplemental Learning Page	EOAWMA_TXNHDTL_FL	Approve a supplemental learning request.
Supplemental Learning - Program Information Page	LM_PRG_SUP1_FL	View information about any programs associated with a supplemental learning request.
Course Information Page	LM_ACT_SUP1_F	View information about any courses associated with a supplemental learning request.
Objectives Page	LM_OBJ_SUP1_FL	View information about any objectives associated with a supplemental learning request.
Attachments Page	LM_ATCH_SUP1_FL	View information about any file attached with a supplemental learning request.

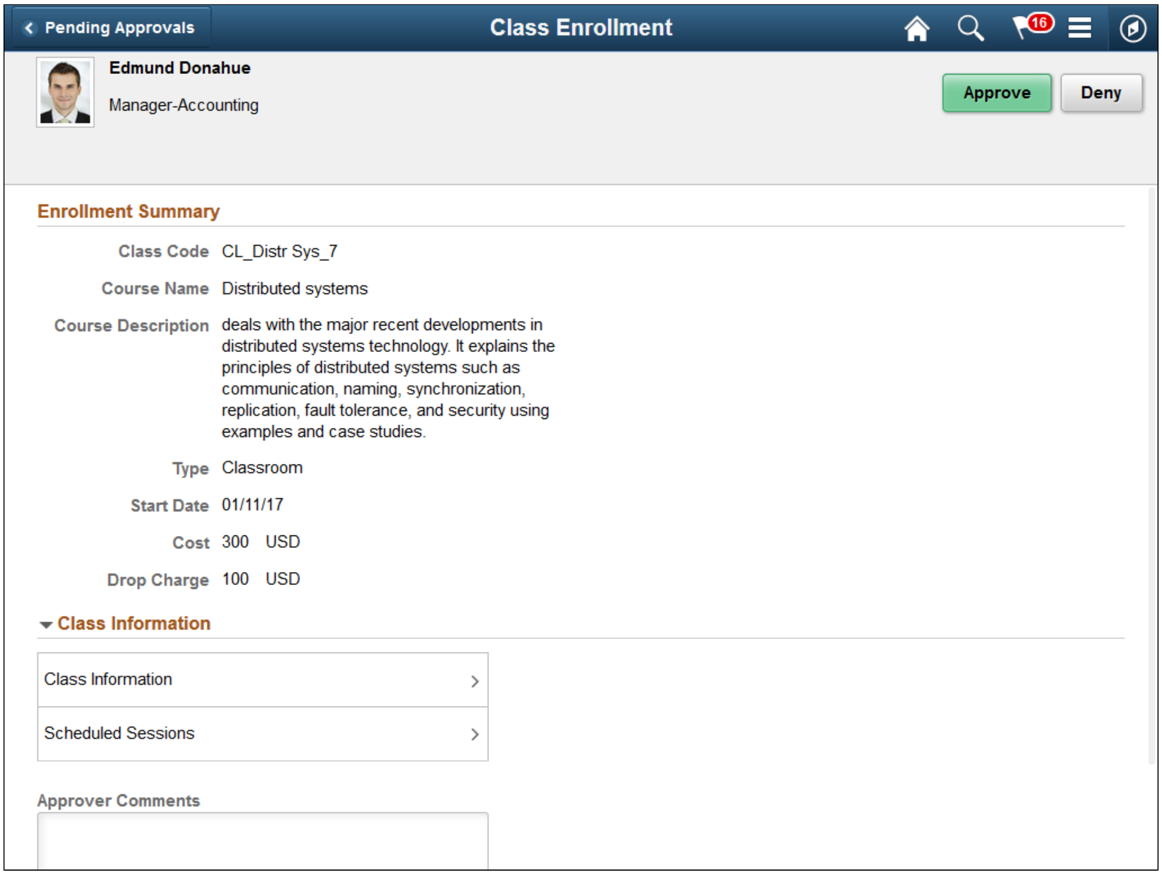
Pending Approvals - Class Enrollment Page

Use the Pending Approvals - Class Enrollment page (EOAWMA_TXNHDTL_FL) to approve a class enrollment request.

Navigation:

On the Manager Self-Service home page, click the Approvals tile to access the Pending Approvals page. Then click a class enrollment request entry on the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - Class Enrollment page.



Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the Pending Approvals - Learning Page (MAP Approvals).

Field or Control	***Description***
Approve and **Deny**	Use these buttons to take action on the requested approval.
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Enrollment Summary

This section of the page displays the following information for the class:

- Class Code
- Course Name

- Description
- Type (delivery method)
- Start Date
- End Date
- Duration
- Cost
- Drop Charge

Note: If any of these parameters are not defined for a class, they are not displayed in the Enrollment Summary.

Class Information

Field or Control	***Description***
Class Information	Click to view additional information about the class on the Class Information Page.
Scheduled Sessions	Click to the view the scheduled sessions for the class on the Scheduled Sessions Page. **Note:** If there are no scheduled sessions for the class being requested, this item does not appear on the page.

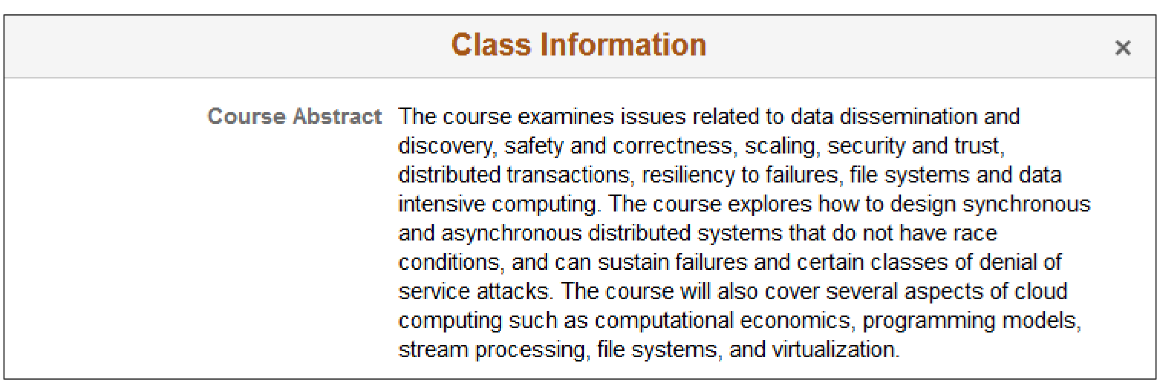
Class Information Page

Use the Class Information page (LM_ITM_DTL1_FL) to view additional information about a class.

Navigation:

Click the **Class Information** item on the Pending Approvals - Class Enrollment page.

This example illustrates the fields and controls on the Class Information page.



This page displays the following class information:

- Course Abstract
- Objectives Met
- Required Prerequisites
- Recommended Prerequisites

Note: This information is defined at the course level. If any of this information is not defined for a course, it does not appear when you click **Class Information**.

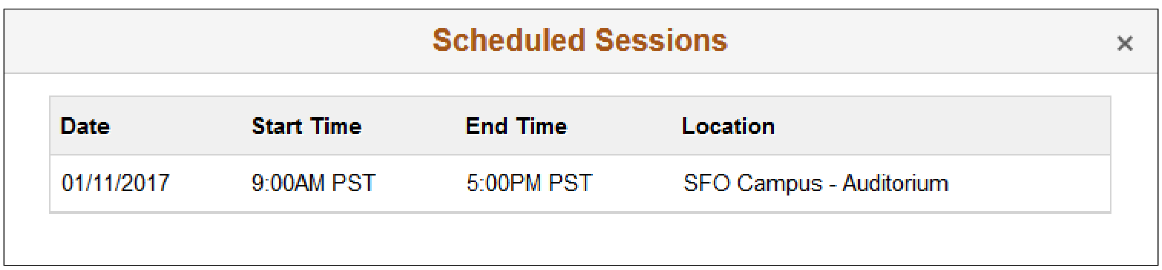
Scheduled Sessions Page

Use the Scheduled Sessions page (LM_SES_DTL1_FL) to view the scheduled sessions for a class.

Navigation:

Click the **Scheduled Sessions** item on the Pending Approvals - Class Enrollment page.

This example illustrates the fields and controls on the Scheduled Sessions page.



This page lists all of the scheduled sessions for the class being requested. For each session, the page displays:

- Start Date
- Start Time
- End Time
- Location

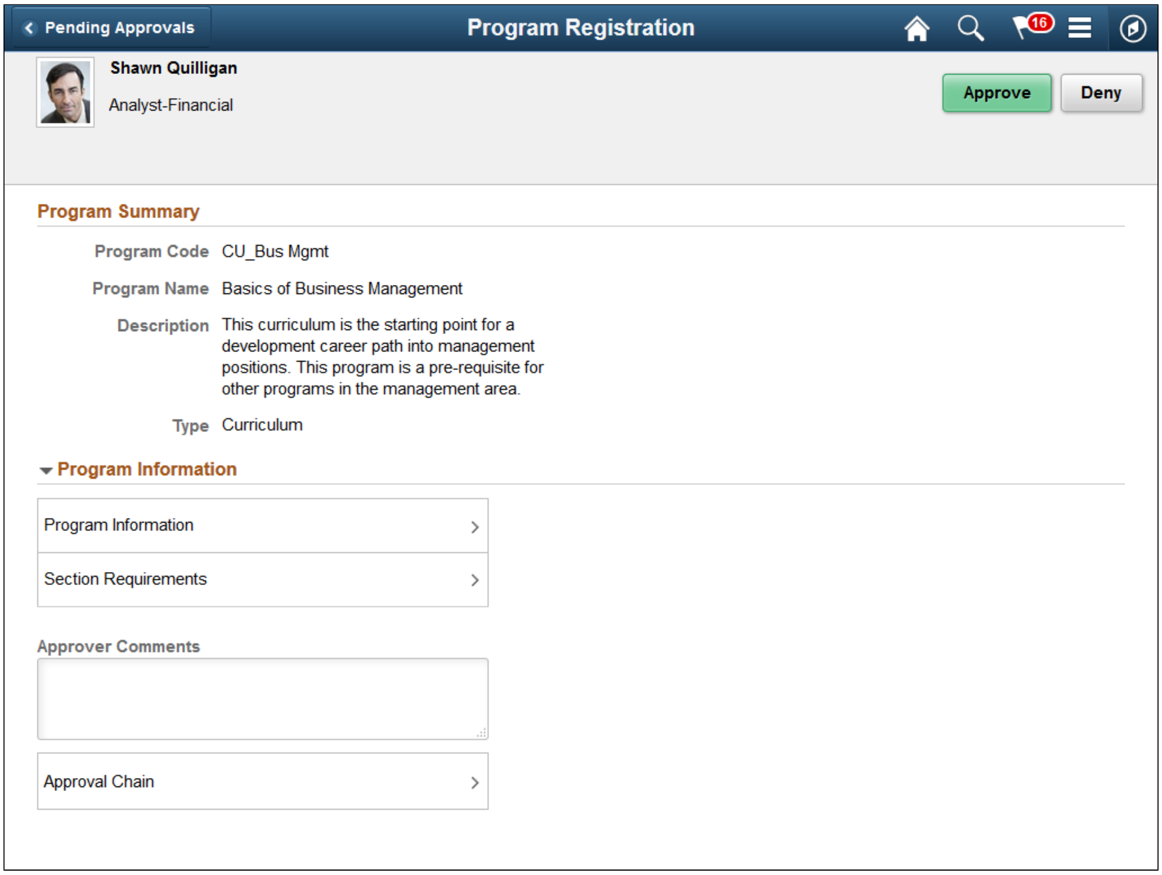
Pending Approvals - Program Registration Page

Use the Pending Approvals - Program Registration page (EOAWMA_TXNHDTL_FL) to approve a program registration request.

Navigation:

On the Manager Self-Service home page, click the Approvals tile to access the Pending Approvals page. Then click a program registration request entry on the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - Program Registration page.



Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the Pending Approvals - Learning Page (MAP Approvals).

Field or Control	***Description***
Approve, Deny, and **Pushback**	Use these buttons to take action on the requested approval.
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Program Summary

This section of the page displays the following information for the program:

- Program Code
- Program Name

- Description
- Type (*Certification* or *Curriculum*)
- Validity

Note: The Validity field appears only for certifications that have a validity period defined.

Program Information

Field or Control	*Description*
Program Information	Click to view additional information about the program on the Program Information Page.
Section Requirements	Click to the view the section requirements for the program on the Section Requirements Page. **Note:** If there are no section requirements defined for a program, this item does not appear on the page.

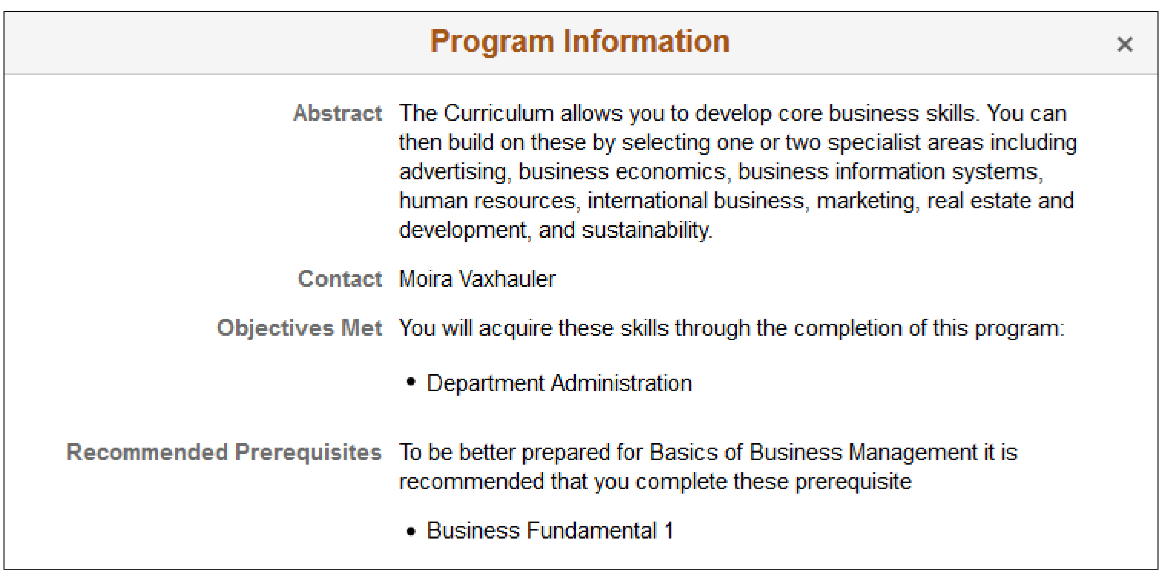
Program Information Page

Use the Program Information page (LM_PROG_DTL1_FL) to view additional information about a program.

Navigation:

Click the **Program Information** item on the Pending Approvals - Program Registration page.

This example illustrates the fields and controls on the Program Information page.



This page displays the following program information:

- Abstract
- Contact (program coordinator)
- Objectives Met
- Required Prerequisites
- Recommended Prerequisites

Note: If any of this information is not defined for a program, it does not appear on the page.

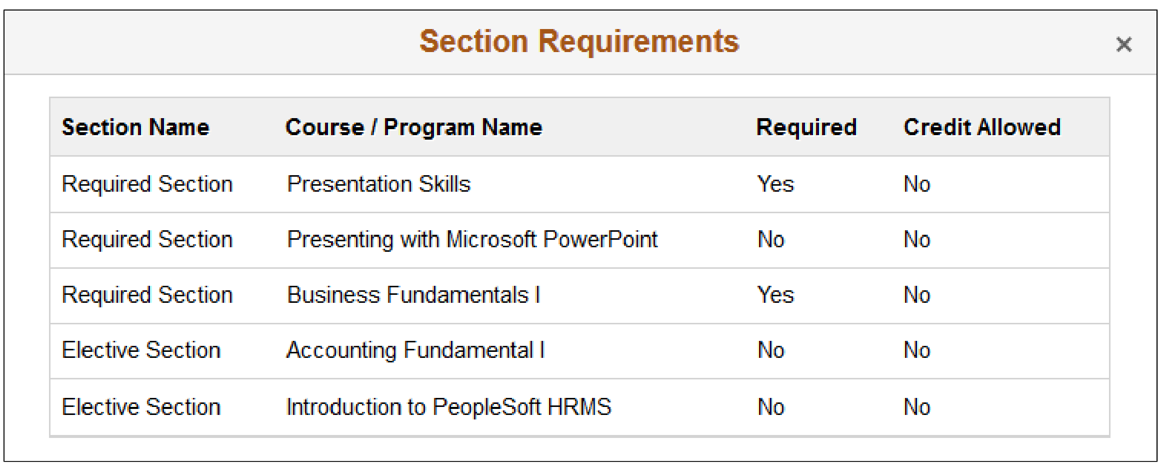
Section Requirements Page

Use the Section Requirements page (LM_PRG_SCN1_FL) to view the section requirements for a program.

Navigation:

Click the **Section Requirements** item on the Pending Approvals - Program Registration page.

This example illustrates the fields and controls on the Section Requirements page.



Section Requirements

Section Name	Course / Program Name	Required	Credit Allowed
Required Section	Presentation Skills	Yes	No
Required Section	Presenting with Microsoft PowerPoint	No	No
Required Section	Business Fundamentals I	Yes	No
Elective Section	Accounting Fundamental I	No	No
Elective Section	Introduction to PeopleSoft HRMS	No	No

This page displays the following section requirement information:

- Section Name
- Course or Program Name
- Required (yes or no)
- Credit Allowed

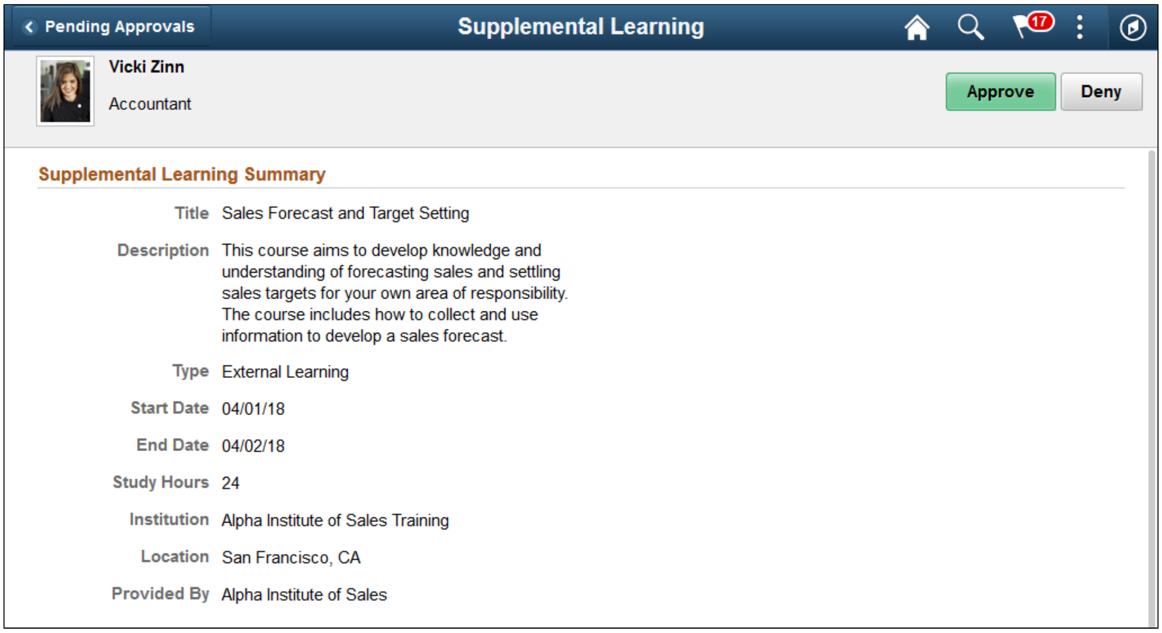
Pending Approvals - Supplemental Learning Page

Use the Pending Approvals - Supplemental Learning page (EOAWMA_TXNHDTL_FL) to approve a supplemental learning request.

Navigation:

On the Manager Self-Service home page, click the Approvals tile to access the Pending Approvals page. Then click a supplemental learning request entry on the Pending Approvals page.

This example illustrates the fields and controls on the Pending Approvals - Supplemental Learning page.



This example illustrates the fields and controls on the Pending Approvals - Supplemental Learning page (2 of 2). You can find definitions for the fields and controls later on this page.

Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the Pending Approvals - Learning Page (MAP Approvals).

Field or Control	***Description***
Approve, Deny, and **Pushback**	Use these buttons to take action on the requested approval.

Field or Control	***Description***
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction.

Supplemental Learning Summary

This section of the page displays the following information for the supplemental learning:

- Title
- Description
- Start Date
- End Date
- Institution
- Location
- Provided By
- Supervised By
- Travel Hours
- Study Hours
- Currency Code
- Education Units
- Price
- Instructions

Note: If any of these fields are not defined for a supplemental learning, they do not appear in the **Supplemental Learning Summary**.

Supplemental Learning Details

Field or Control	***Description***
Program Information	Click to view information about the programs associated with the supplemental learning on the Supplemental Learning - Program Information Page. **Note:** The **Program Information** item is available only if programs have been added to the supplemental learning.
Course Information	Click to view information about the courses associated with the supplemental learning on the Course Information Page **Note:** The **Course Information** item is available only if courses have been added to the supplemental learning.
Objectives	Click to view information about the objectives associated with the supplemental learning on the Objectives Page. **Note:** The **Objectives** item is available only if objectives have been added to the supplemental learning.
Attachments	Click to view information about the file attached with the supplemental learning on the Attachments Page. **Note:** The **Attachments** item is available only if a file has been added to the supplemental learning.

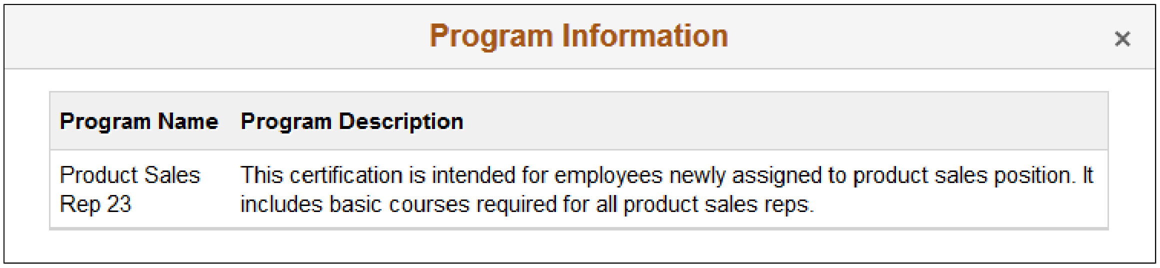
Supplemental Learning - Program Information Page

Use the Supplemental Learning - Program Information page (LM_PRG_SUP1_FL) to view information about any programs associated with a supplemental learning request.

Navigation:

Click the **Program Information** item on the Pending Approvals - Supplemental Learning page.

This example illustrates the fields and controls on the Supplemental Learning - Program Information page.



Program Information

Program Name	Program Description
Product Sales Rep 23	This certification is intended for employees newly assigned to product sales position. It includes basic courses required for all product sales reps.

This page displays the following information for programs associated with the supplemental learning:

- Program Name
- Program Description

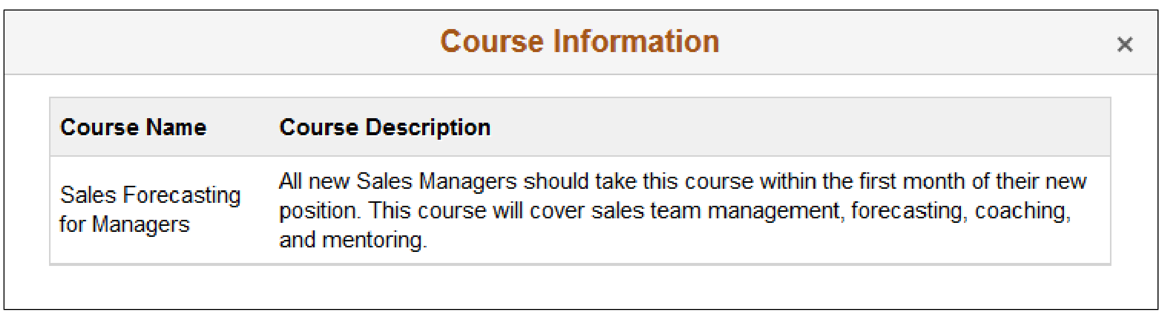
Course Information Page

Use the Course Information page (LM_ACT_SUP1_FL) to view information about any courses associated with a supplemental learning request.

Navigation:

Click the **Course Information** item on the Pending Approvals - Supplemental Learning page.

This example illustrates the fields and controls on the Course Information page.



Course Information

Course Name	Course Description
Sales Forecasting for Managers	All new Sales Managers should take this course within the first month of their new position. This course will cover sales team management, forecasting, coaching, and mentoring.

This page displays the following information for courses associated with the supplemental learning:

- Course Name
- Course Description

Objectives Page

Use the Objectives page (LM_OBJ_SUP1_FL) to view information about any objectives associated with a supplemental learning request.

Navigation:

Click the **Objectives Information** item on the Pending Approvals - Supplemental Learning page.

This example illustrates the fields and controls on the Objectives page.


Objectives

Objective Code	Objective Name	Description	Proficiency
S127	Sales Management	Sales management includes a detailed understanding of the products and services offered by the company and the ability to assess and forecast market demand and manage the company's resources to meet this demand.	

This page displays the following information for objectives associated with the supplemental learning:

- Objective Code
- Objective Name
- Description
- Proficiency

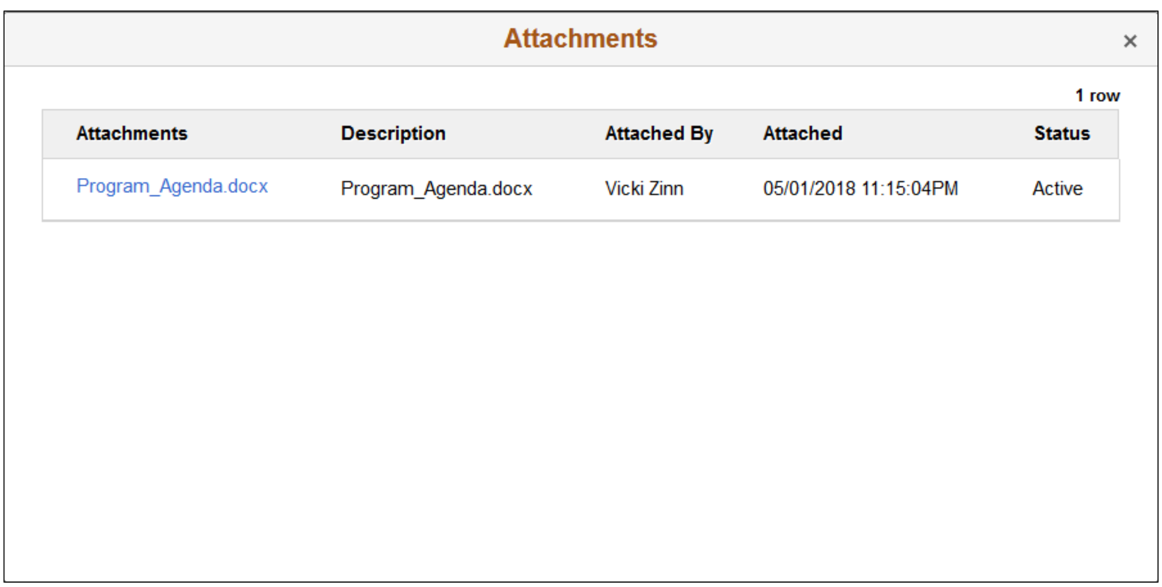
Attachments Page

Use the Attachments page (LM_ATCH_SUP1_FL) to view information about any file attached with a supplemental learning request.

Navigation:

Click the **Attachments** item on the Pending Approvals - Supplemental Learning page.

This example illustrates the fields and controls on the Attachments page. You can find definitions for the fields and controls later on this page.


Attachments

1 row

Attachments	Description	Attached By	Attached	Status
Program_Agenda.docx	Program_Agenda.docx	Vicki Zinn	05/01/2018 11:15:04PM	Active

This page displays the following information for any file attached with the supplemental learning:

- Attachments (Displays the file name)
- Description
- Attached By
- Attached (Displays the date and time stamp of the attached file.)
- Status (Available values are *Active* and *Deleted by Administrator*.)

Viewing ELM Insights

ELM Insights offers new dashboards for Learning Insights and Certification Insights.

Learning Insights helps the managers to view the status of mandatory and non-mandatory learnings. The manager can quickly and easily view how many learners in the team are overdue, due in the upcoming days, completed, etc. Managers can view the most enrolled courses and enrollment trends over a period.

The Certification insights facilitates the managers to view the learner's certification status. Managers can quickly analyze the count of expired certifications, certifications that are going to expire, and certifications completed by learners.

Note: These insights are built only for internal learners. Supplemental learning that is not associated with any course or program to get the waiver is not included in these dashboards.

This topic provides an overview of the deployment and access of these insights for ELM, discusses how to view the insights for managers.*PeopleTools Search Technology:* "Working with Insights Dashboards for PeopleSoft Application Data", Managing a Delivered Dashboard.

Understanding How to Deploy and Access the ELM Insights

Before users can access the learning and certifications insights, the following steps should be performed:

1. Deploy and run the below search indexes.

   (PeopleTools > Search Framework > Administration > Deploy Search Objects)

   - LM_ACT_ENRLMNTS: Course Enrollments – by Manager
   - LM_DR_LEARNING: Course Enrollments – Direct Reports
   - LM_DR_RGSTNS: Program Registrations – Direct Reports
   - LM_PRG_RGSTNS: Program Registrations – by Manager

2. Deploy the below dashboards:

   - Team Learning Insights Tile
   - Team Learning Insights Dashboard
   - Learning by Manager Tile

- Learning by Manager Dashboard
- Team Certification Insights Tile
- Team Certification Insights Dashboard
- Certifications by Manager Tile
- Certifications by Manager Dashboard

(PeopleTools > Search Framework > Administration > Deploy Insights Dashboards)

3. Assign the Learning Manager Fluid user role to users to access and view learning and certification visualizations:

For more information about the Deploy Insights Dashboards page, see *PeopleTools Search Technology:* “Working with Insights Dashboards for PeopleSoft Application Data”, Managing a Delivered Dashboard.

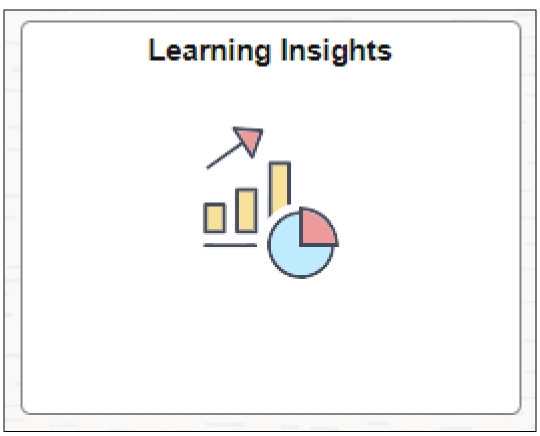
Learning Insights Tile

Use the Learning Insights tile to access the Insights home page.

Navigation

Manager Self Service > **Learning Insights**

This example illustrates the fields and controls on the Learning Insights tile.



Insights Home page

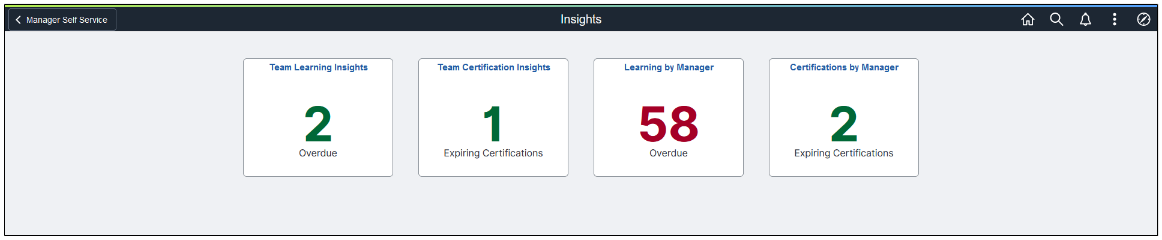
Use the Insights home page to access the following tiles:

- Team Learning Insights
- Team Certification Insights
- Learning by Manager
- Certifications by Manager

Navigation

Click the Learning Insights tile available on the Manager Self Service home page.

This example illustrates the fields and controls on the Insights dashboard.



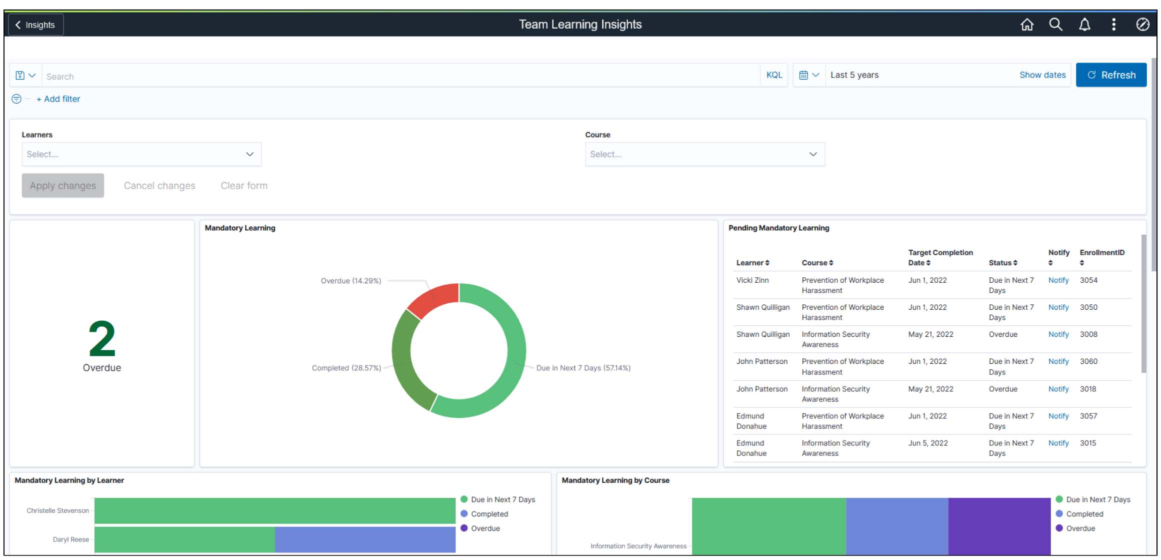
Team Learning Insights

Use the Team Learning Insights to view and analyze the enrollment details of the employees who directly report to the logged in manager.

Navigation

Click the Team Learning Insights tile on the Insights home page.

This example illustrates the fields and controls on the Team Learning Insights dashboard.



You can filter the visualization based on Learner and Course. Visualizations on Dashboard react to the changes made in these filters. For more information on working with the data visualization tool and filters, see PeopleTools Search Technology, “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Mandatory Learning Visualizations

This group of visualizations helps the managers to view and manage the status of mandatory learning enrollments of their direct reports.

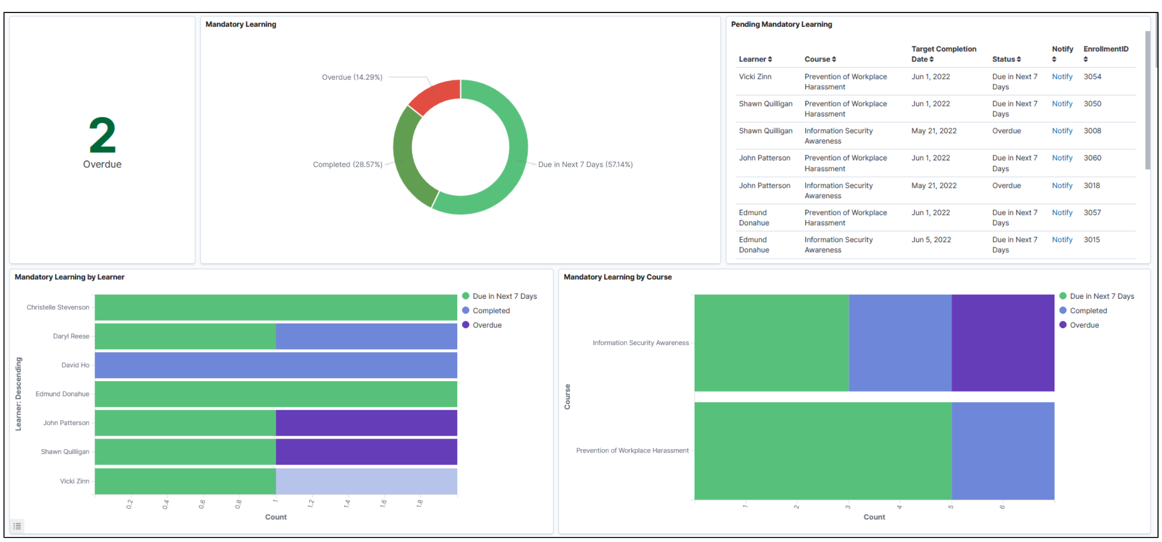
It includes:

- Metric Visualization: This visualization displays the count of mandatory learning courses that are overdue for the direct reports.
- Mandatory Learning: Mandatory Learning Visualization shows the count of direct reports who completed the mandatory course and the count of direct reports who are yet to complete.
    - Completed
    - Due
        - Overdue
        - Due in Future
        - Due Today
        - Due in seven days

Note: ‘Due in seven days’ is set as the default value. You can modify this based on requirements.

- Pending Mandatory Learning – Pending Mandatory Learning list displays more information on pending status with details like the learner’s name, course, target completion date, etc. in tabular form, based on the applied filter.
- Mandatory Learning by Learner – This visualization helps the managers to view the mandatory learning status of their direct reports. It gives information like how many courses enrolled for a specific learner, how many are completed, how many are due in next seven days, how many are due to complete by today and how many are due in future.
- Mandatory Learning by Course – This visualization helps the manager to view and analyze the mandatory learning status of the direct reports based on the course. It gives the details like how many direct reports have enrolled to a specific mandatory course and their completion status.

This example illustrates the fields and controls for the Mandatory Learning Visualizations on the Team Learning Insights dashboard.



All Learning Visualizations

This group of visualizations helps the Manager visualize the status of mandatory and non-mandatory courses enrolled by the direct reports.

It includes:

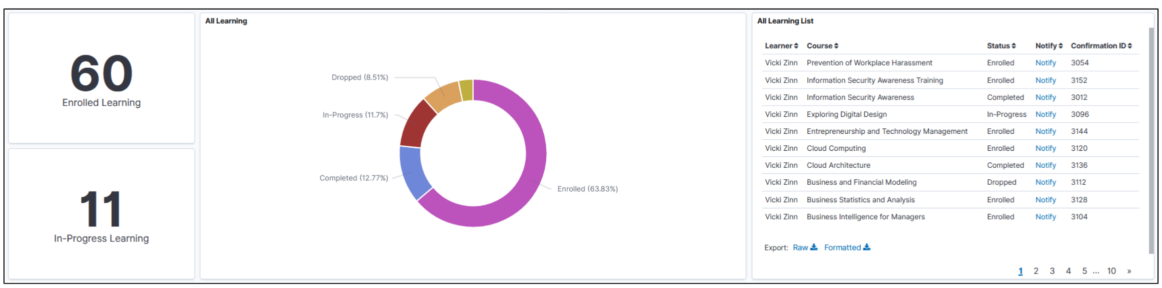
- Metric Visualization – This visualization displays the count of enrolled and ongoing learning courses for the direct reports.
- All Learning Visualization– This visualization helps the manager to view the status of both mandatory and non-mandatory learnings for the direct reports.

  Possible statuses are:

  - Enrolled
  - Completed
  - Dropped
  - In Progress
  - Not Completed

- All Learning List- Displays the details of mandatory and non-mandatory learnings like the learner's name, status, etc. in tabular form, based on the applied filter.

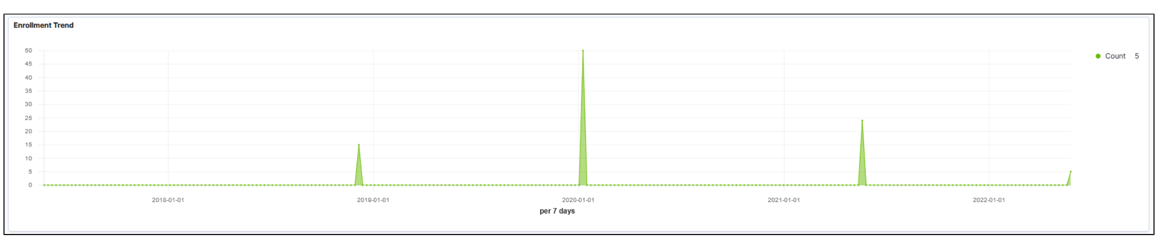
This example illustrates the fields and controls for the All Learning Visualizations on the Team Learning Insights dashboard.



Enrollment Trend

This visualization displays the number of dropped enrollments by the direct reports over a period.

This example illustrates the fields and controls for the Enrollment Trend on the Team Learning Insights dashboard.



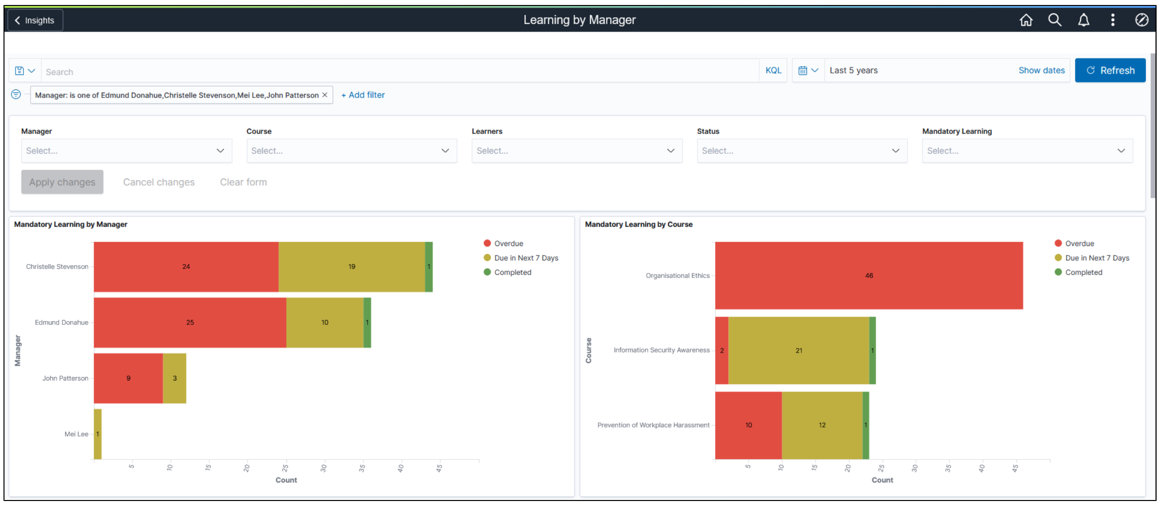
Learning by Manager

Use the Learning by Manager insights to view and analyze the enrollment details of all the managers (direct/indirect) in the organizational hierarchy of the logged in user.

Navigation

Click the Learning by Manager tile on the Insights home page.

This example illustrates the fields and controls on the Learning by Manager dashboard.



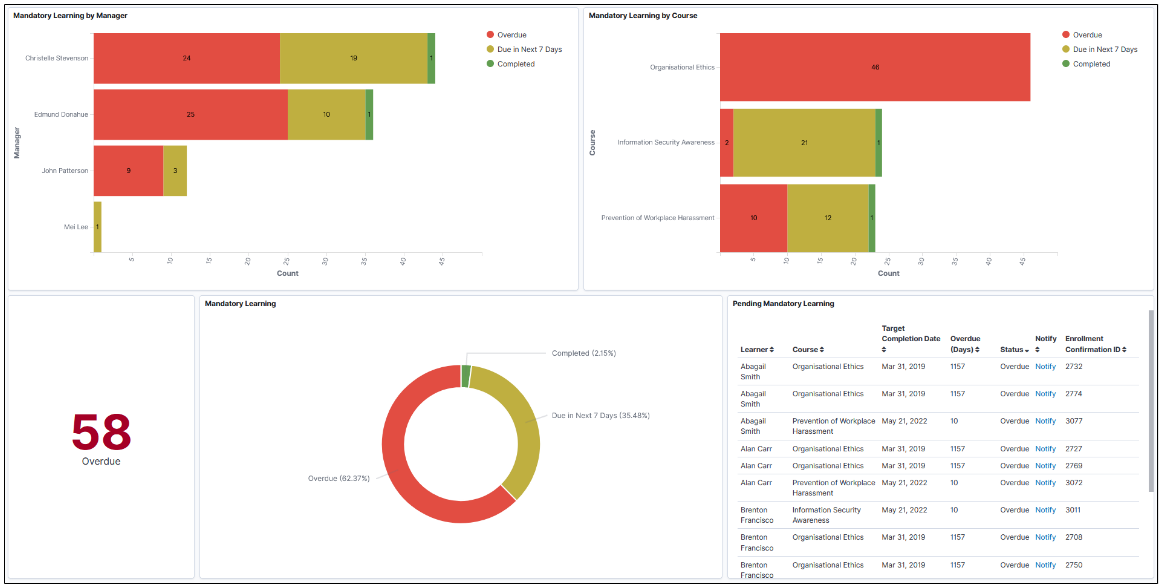
Mandatory Learning Visualizations

This group of visualizations display the status of mandatory learning enrollments for the all the managers (both direct and indirect) in the organizational hierarchy of the logged in user.

It includes:

- Mandatory Learning by Manager – Mandatory Learning by Manager visualization shows all managers (both direct and indirect) in the organizational hierarchy of the logged in user who have completed the mandatory course. If Manager filter is not selected, then it shows the mandatory learning status of all the managers (direct or indirect manager) who report to the logged in person. By default, direct reporting manager is selected in the Manager field. It also displays all statuses such as Completed, Overdue, Due Today, Due in next 7 days, and Due in Future.
- Mandatory Learning by Course – This visualization displays the mandatory learning statuses of all managers (both direct and indirect) in the organizational hierarchy of the logged in user.
- Metric Visualization- This visualization displays the count of mandatory learning courses that are overdue for all managers (both direct and indirect) in the organizational hierarchy of the logged in user.
- Mandatory Learning- This visualization displays the status of all mandatory learning courses for all managers (both direct and indirect) in the organizational hierarchy of the logged in user.
- Pending Mandatory Learning – Pending Mandatory Learning list displays details of the pending mandatory learning courses of all managers (both direct and indirect) in the organizational hierarchy of the logged in user.

This example illustrates the fields and controls for the Mandatory Learning Visualizations on the Learning by Manager dashboard.



All Learning Visualizations

This group of visualizations helps the Manager visualize the status of mandatory and non-mandatory courses enrolled by the organization of the direct reports.

It includes:

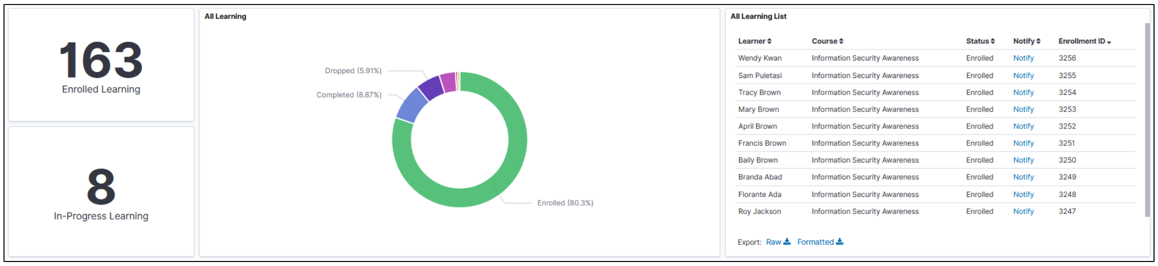
- Metric Visualizations – This visualization displays the count of enrolled and in progress learning for all managers (both direct and indirect) in the organizational hierarchy of the logged in user.
- All Learning Visualization – This visualization helps the manager to view the status of both mandatory and non-mandatory learnings for all managers (both direct and indirect) in the organizational hierarchy of the logged in user.

  Possible statuses are:

  - Enrolled
  - Completed
  - Dropped
  - In Progress
  - Not Completed
  - Waitlist
  - Pending

- All Learning List – Displays the details of mandatory and non-mandatory learnings like the learner’s name, status, etc. in tabular form, based on the applied filter.

This example illustrates the fields and controls for the All Learning Visualizations on the Learning by Manager dashboard.



Most Enrolled Courses (Excludes Mandatory Learning)

This tag cloud visualization displays the non-mandatory learning courses that people are taking on their own interest. The most enrolled courses are displayed in larger fonts

This example illustrates the fields and controls for the Most Enrolled Courses (Excludes Mandatory Learning) on the Learning by Manager dashboard.

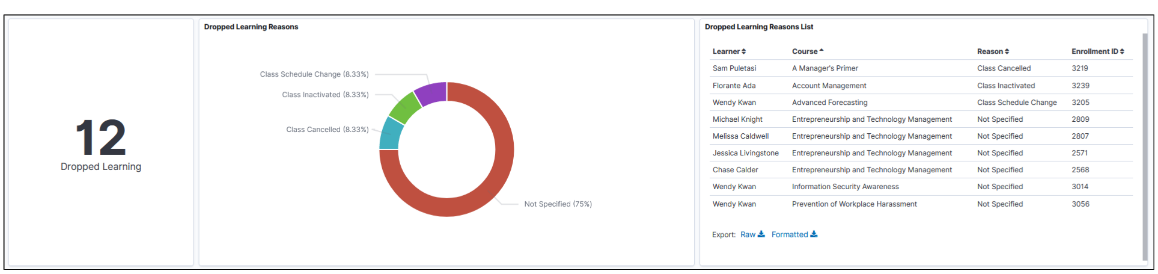
Dropped Learning Visualizations

This group of visualizations display details of learning enrollments that are dropped.

It includes:

- Metric Visualization – This displays the count of enrolled courses that are dropped.
- Dropped Learning Reasons – This visualization helps the managers to analyze the reasons for dropping the enrolled courses.
- Dropped Learning Reasons List – This visualization displays the list of all dropped learnings.

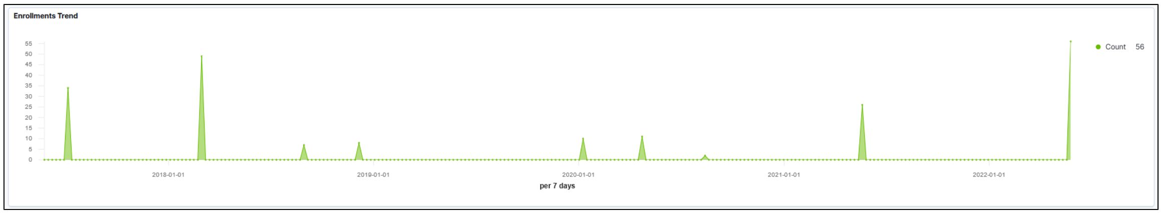
This example illustrates the fields and controls for the Dropped Learning Visualizations on the Learning by Manager dashboard.



Enrollments Trend

This visualization displays the number of dropped enrollments of all managers (both direct and indirect) in the organizational hierarchy of the logged in user over a period.

This example illustrates the fields and controls for the Enrollments Trend Visualizations on the Learning by Manager dashboard.



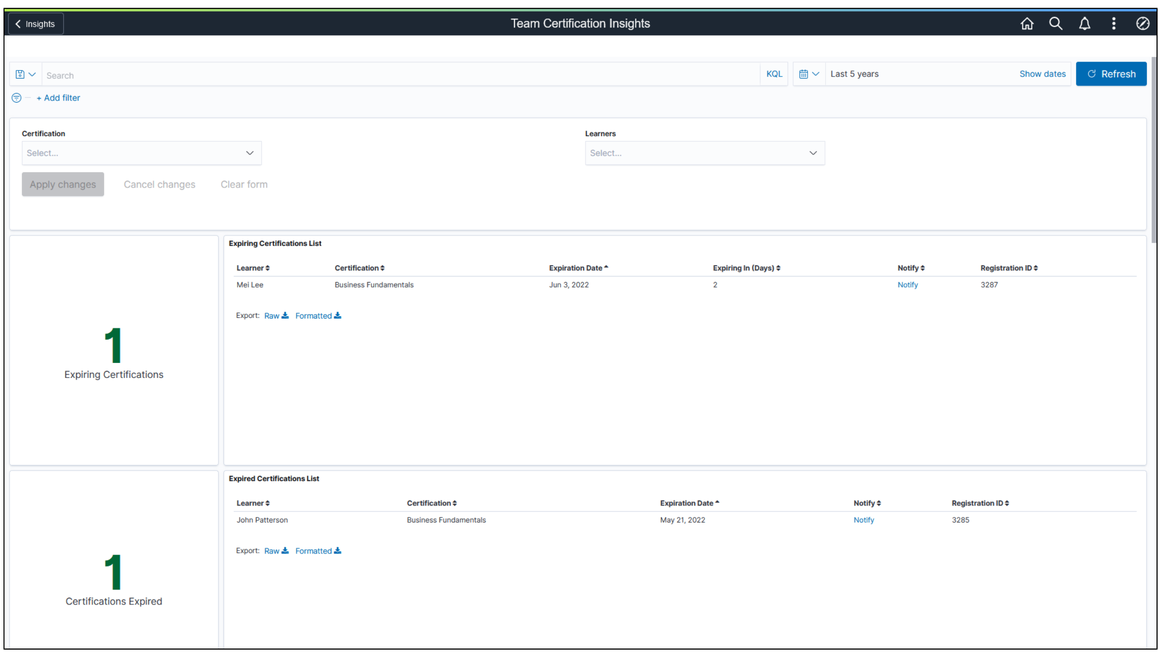
Team Certification Insights

Use the Team Certification Insights to view and analyze the certification details of the employees who directly report to the logged in manager.

Navigation

Click the Team Certification Insights tile on the Insights home page.

This example illustrates the fields and controls on the Team Certification Insights dashboard.



Expiring Certifications Visualizations

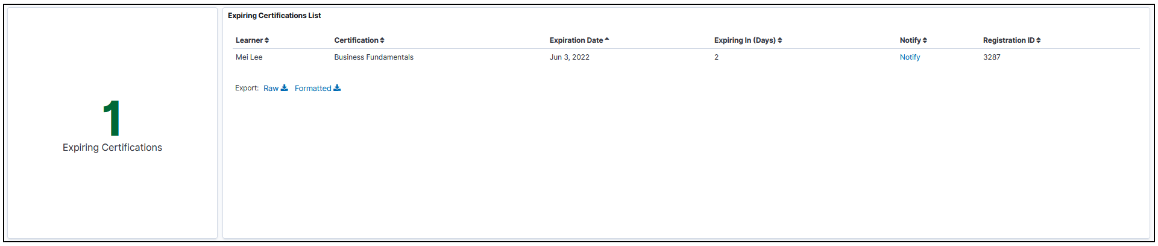
This group of visualizations display the certifications that are going to expire for the direct reports of the logged in user.

It includes:

- Metric Visualization – This visualization displays the number of certifications that are going to expire.
- Expiring Certification List – This visualization displays the details of certifications that are going to expire.

By default, the expiry date is set as 15 days. You can change the default expiry date by modifying the filter values in visualizations.

This example illustrates the fields and controls for the Expiring Certifications Visualizations on the Team Certification Insights dashboard.



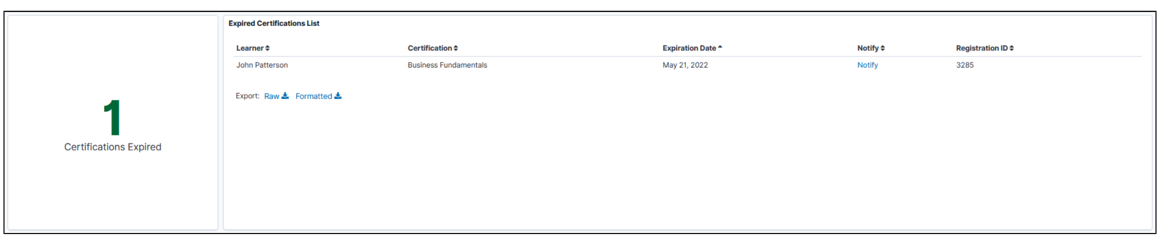
Expired Certifications Visualizations

This group of visualizations help the manager to view and analyze the certifications that are expired.

It includes:

- Metric Visualization – This visualization displays the count of certifications expired for the direct reports.
- Expired Certification List – This visualization displays the details of certifications that got expired for the direct reports like learner’s name, certification name, expiration date etc.

This example illustrates the fields and controls for the Expired Certifications Visualizations on the Team Certification Insights dashboard.



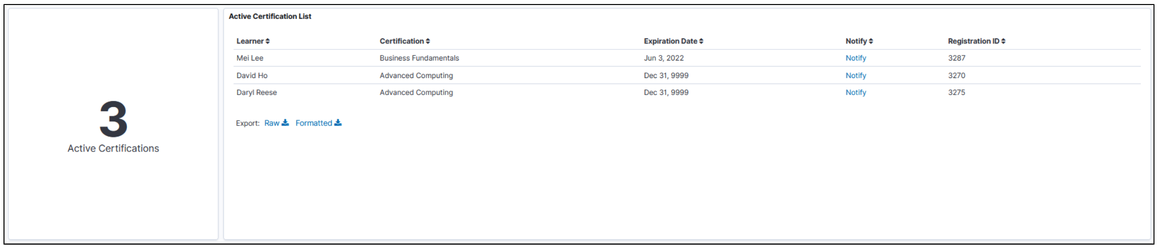
Active Certification Visualizations

This group of visualizations help the managers to view and analyze the details of active certifications. This helps the manager to get an idea of how many team members are certified.

It includes:

- Metric Visualization – This visualization displays the count of active certifications.
- Active Certification List – This visualization displays the details of active certifications like Expiration Date, Registration ID etc.

This example illustrates the fields and controls for the Active Certifications Visualizations on the Team Certification Insights dashboard.



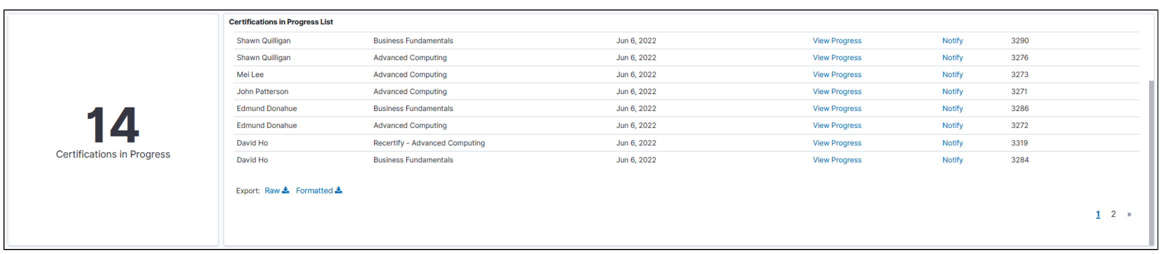
In Progress Certification Visualizations

This group of visualizations help the managers to view and analyze the direct reports whose certifications are in progress.

It includes:

- Metric Visualization – This visualization displays the count of certifications that are In Progress.
- Certification In Progress List Visualization – This displays the details of ongoing certifications like the learner's name, certification name, target completion date etc. Managers can also view the progress of certification and can notify the employees for program updates.

This example illustrates the fields and controls for the In Progress Certifications Visualizations on the Team Certification Insights dashboard.



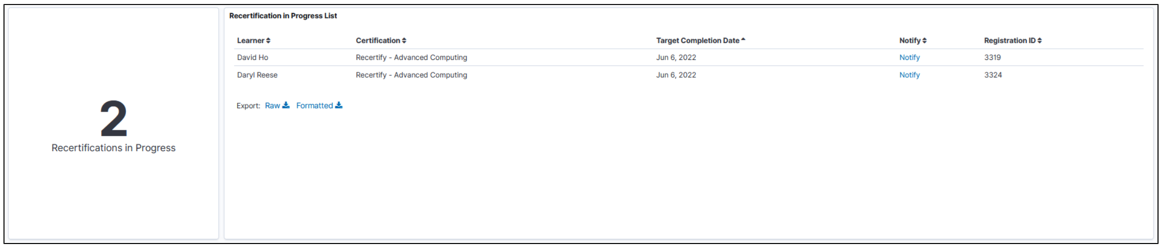
Recertification In Progress Visualizations

This group of visualizations help managers to view and analyze the ongoing recertification details of employees.

It includes:

- Metric Visualization – This displays the count of recertification in progress.
- Recertification In Progress List – This displays the details of ongoing recertification like the learner's name, certification name, target completion date etc.

This example illustrates the fields and controls for the Recertification In Progress Visualizations on the Team Certification Insights dashboard.



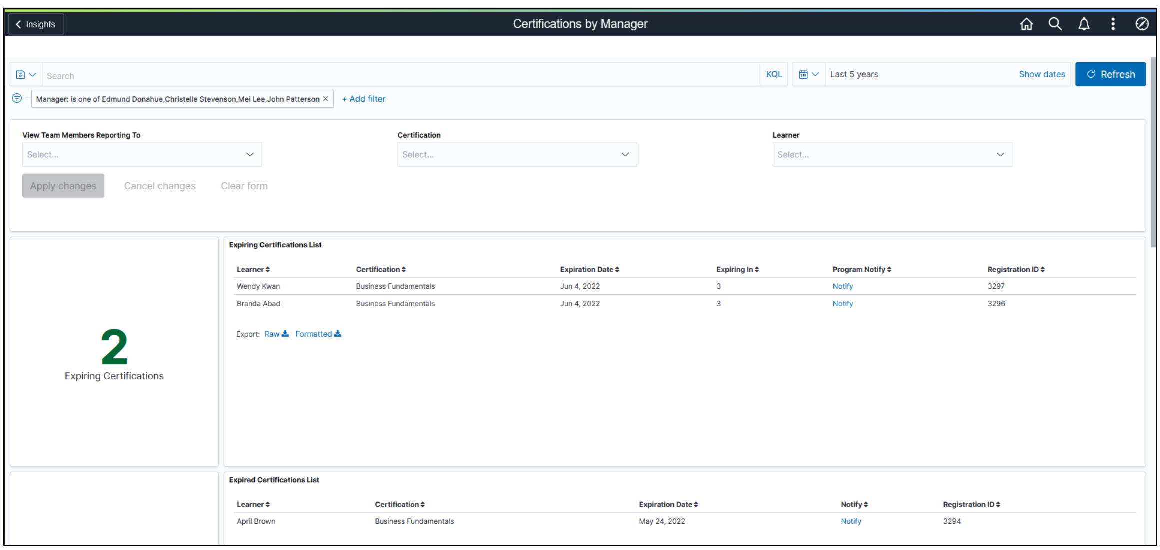
Certifications by Manager

Use the Certifications by Manager insights to view and analyze the certification details of all managers (both direct and indirect) in the organizational hierarchy of the logged in user.

Navigation

Click the Team Certifications by Manager tile on the Insights home page.

This example illustrates the fields and controls on the Certifications by Manager dashboard.



You can filter the visualization based on Reporting Managers, Certification and Learners. Visualizations on Dashboard react to the changes made in these filters. For more information on working with the data visualization tool and filters, see PeopleTools Search Technology, “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Expiring Certifications Visualizations

This group of visualizations display the certifications that are going to expire for all the managers (both direct and indirect) in the organizational hierarchy of the logged in user.

It includes:

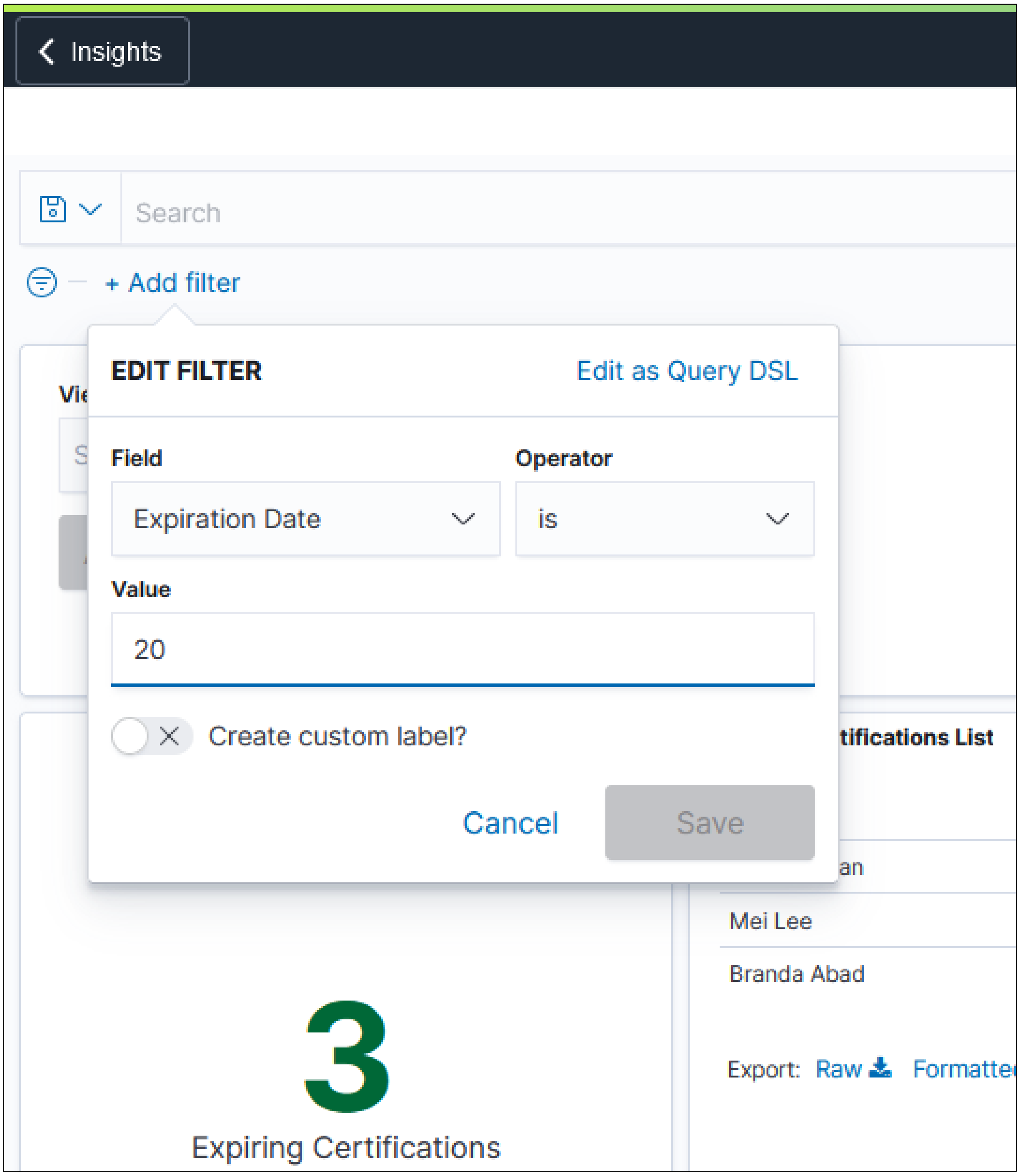
- Metric Visualization – This visualization displays the number of certifications that are going to expire for the all the managers in the organizational hierarchy of the logged in user. By default, the expiry date is set as 15 days. You can change the default expiry date by modifying the filter values in visualizations.

- Expiring Certification List – This visualization displays the details of certifications that are going to expire for the all the managers in the organizational hierarchy of the logged in user.

This example illustrates the fields and controls for the Expiring Certifications Visualizations on the Certifications by Manager dashboard.

By default, the expiry date is set as 15 days within the visualization. You can change the default expiry date by modifying the visualizations.

This example illustrates the fields and controls to filter the Expiring Certifications Visualizations.



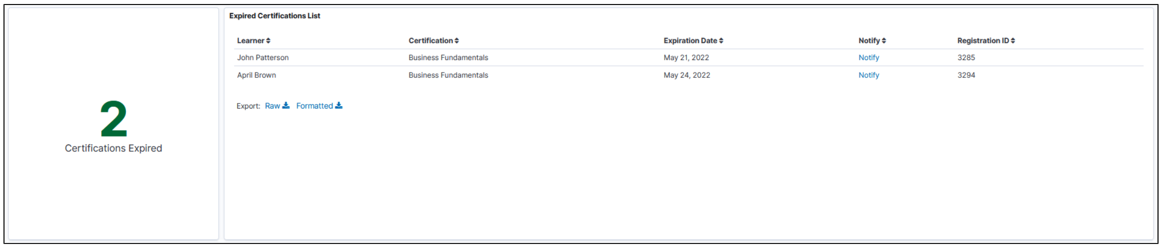
Expired Certifications Visualizations

This group of visualizations help the manager to view and analyze the certifications that are expired.

It includes:

- Metric Visualization – This visualization displays the count of certifications expired for all the managers in the organizational hierarchy of the logged in user.
- Expired Certification List – This visualization displays the details of certifications that got for all the managers in the organizational hierarchy of the logged in user.

This example illustrates the fields and controls for the Expired Certifications Visualizations on the Certifications by Manager dashboard.



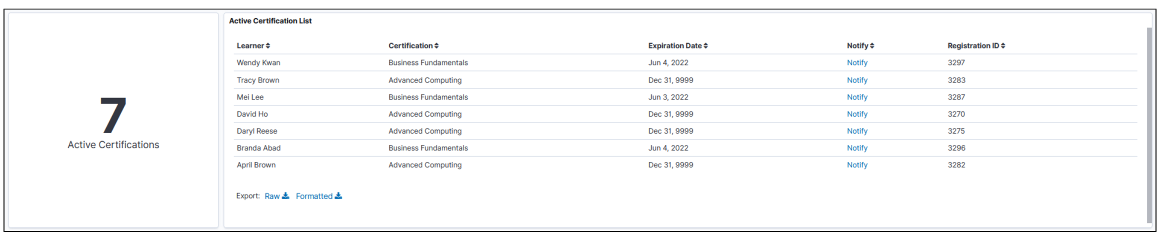
Active Certification Visualizations

This group of visualizations display the active certifications details of all the managers in the organizational hierarchy of the logged in user.

It includes:

- Metric Visualization – This visualization displays the count of active certifications for all the managers in the organizational hierarchy of the logged in user.
- Active Certification List – This visualization displays the details of active certifications like expiration date, registration ID etc. for all the managers in the organizational hierarchy of the logged in user.

This example illustrates the fields and controls for the Active Certifications Visualizations on the Certifications by Manager dashboard.



In Progress Certification Visualizations

This group of visualizations display the ongoing certifications for the all the managers in the organizational hierarchy of the logged in user.

It includes:

- Metric Visualization – This visualization displays the count of ongoing certifications of all managers (both direct and indirect) in the organizational hierarchy of the logged in user.
- Certification In Progress List Visualization – This displays the details of In Progress certifications like the learner's name, certification name, target completion date etc. Managers can also view the progress of certification and can notify the team for program updates.

This example illustrates the fields and controls for the In Progress Certifications Visualizations on the Certifications by Manager dashboard.

Learner	Certification	Target Completion Date	View Progress	Notify	Registration ID
Vicki Zinn	Business Fundamentals	Jun 6, 2022	View Progress	Notify	3288
Vicki Zinn	Advanced Computing	Jun 6, 2022	View Progress	Notify	3274
Tracy Brown	Recertify - Advanced Computing	Jun 6, 2022	View Progress	Notify	3337
Shawn Quilligan	Business Fundamentals	Jun 6, 2022	View Progress	Notify	3290
Shawn Quilligan	Advanced Computing	Jun 6, 2022	View Progress	Notify	3276
Richard Hasson	Business Fundamentals	Jun 6, 2022	View Progress	Notify	3292
Richard Hasson	Advanced Computing	Jun 6, 2022	View Progress	Notify	3280
Mei Lee	Advanced Computing	Jun 6, 2022	View Progress	Notify	3273
Lilian Pula	Advanced Computing	Jun 6, 2022	View Progress	Notify	3279
John Patterson	Advanced Computing	Jun 6, 2022	View Progress	Notify	3271

Recertification In Progress Visualizations

This group of visualizations display the recertification details of all managers (both direct and indirect) in the organizational hierarchy of the logged in user. Recertification is required in cases where the employee need to attend the program all over again or need to attend certain sections of the course to complete the entire certification before it expires.

It includes:

- Metric Visualization – This displays the count of ongoing recertification of all managers (both direct and indirect) in the organizational hierarchy of the logged in user.
- Recertification In Progress List – This displays the details of In Progress recertification like the learner’s name, certification name, target completion date etc.

Using the PeopleSoft Fluid Interface For Team Learning

This topic describes how to use the PeopleSoft Fluid Interface to add and manage learning for your team members.

Pages Used to Perform Team Learning Using the PeopleSoft Fluid User Interface

This section discusses on the pages used for team learning.

Page Name	***Definition Name***	***Usage***
Team Learning Page	LM_MSS_HM_FL	Access a collection of frequently-used team learning management components.
Add Learning – By Team Members	LM_MSS_TEAM_FL	Search for team members and assign learnings (course or program) for them.
Add Learning – By Courses or Programs	LM_FND_LRN_RSLT_FL	Search for learnings (course or program) and add to team members.
Add Supplemental Learning	LM_MSS_TEAM_FL	Add external learning for team members.

Page Name	***Definition Name***	***Usage***
Manage Learning and Learning History	LM_MSS_LEARNING_FL	Review learnings for your team members.

User Access

User Role	***Access***
Learning Manager Fluid	Provides access to the Team Learning tile.

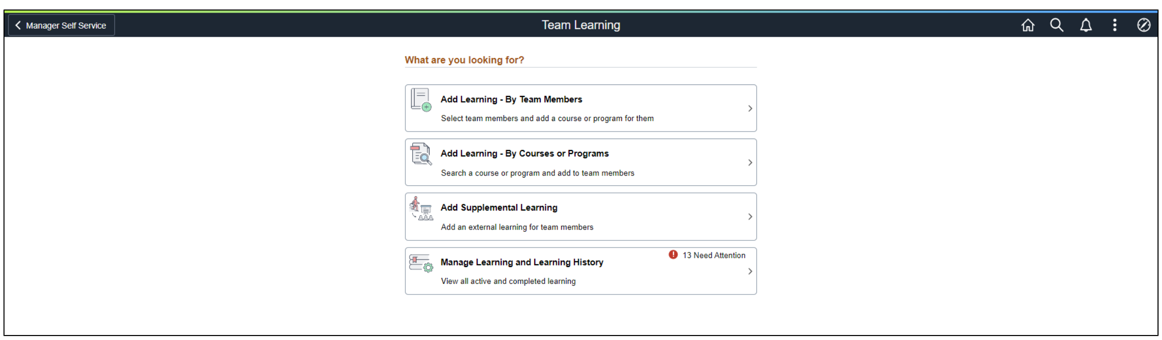
Team Learning Page

Use the Team Learning page (LM_MSS_HM_FL) to access a collection of frequently-used team learning management components.

Navigation:

Manager Self Service > **Team Learning**

This example illustrates the fields and controls on the Team Learning page.



Team Learning Pages

The Team Learning page provides the following actions for the logged-in manager:

- Add Learning – By Team Members
- Add Learning – By Courses or Programs
- Add Supplemental Learning
- Manage Learning and Learning History

If the manager does not have any direct reports, then all the actions on the Team Learning home page are disabled.

If any team member has an overdue course or an expired certification, then the system marks the *Manage Learning and Learning History* action with a red alert icon (!) along with the number of learnings that are overdue or expired learning. This helps the manager to identify the number of learnings he needs to take action on from the Team Learning home page.

Add Learning – By Team Members

Use the Add Learning – By Team Members (LM_MSS_TEAM_FL) page to select the team members (learners) and add them to a learning (course or program).

Navigation:

Manager Self Service > **Team Learning** > **Add Learning – By Team Members**

The Add Learning – By Team Members page allows the managers to add the team members to a learning through a series of steps:

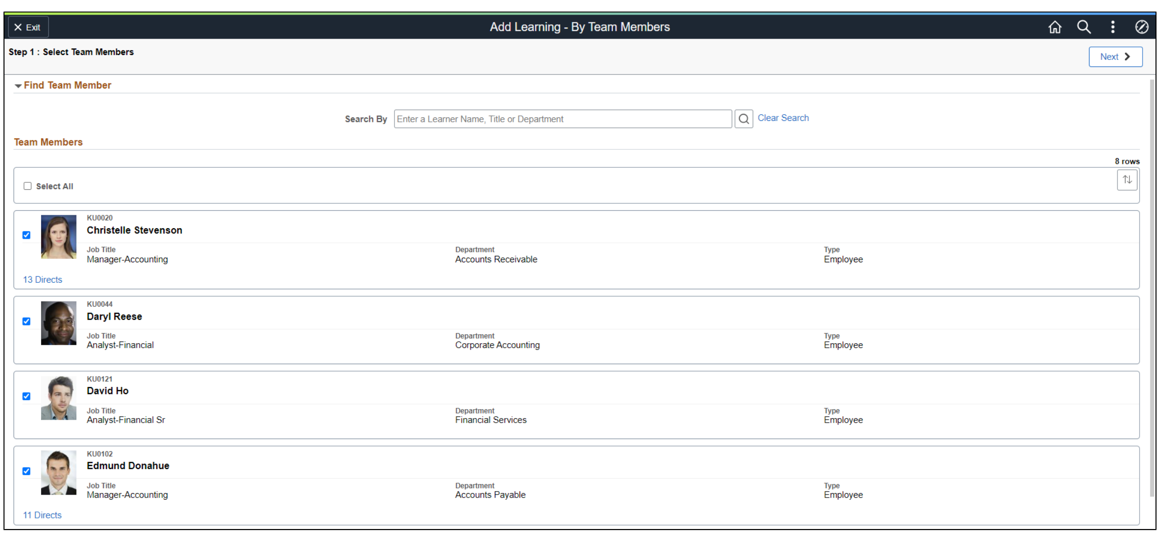
1. Step 1: Select Team Members
2. Step 2: Find Learning
3. Step 3: Select Classes
4. Step 4: Review and Confirm
5. Confirmation

Use the **Previous** and **Next** buttons to navigate through the steps.

Step 1 : Select Team Members

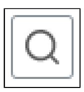
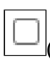
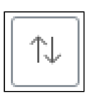
Use the Step 1 : Select Team Member (LM_MSS_TEAM_FL) page to view a list of your direct reports and select team members to assign to a learning.

This example illustrates the fields and controls on the Step 1: Select Team Members page.



This page displays all your direct reports and provides an option to view their directs (if any) by clicking on the **<n> Directs** link below the profile photo of your direct report. User can only view their directs and direct reports of those directs (next level). Expand the **Find Team Member** section to narrow the search for your team members. Select one or more team members from the **Team Members** grid and click **Next** button to go to the **Step 2: Find Learning** page.

Note: If the manager tries to enroll or register an external learner in a course or program that has cost associated, the system displays a message that external learners cannot be enrolled. To proceed with the enrollment, the manager has to remove the external learner or add a learning that does not have a cost associated.

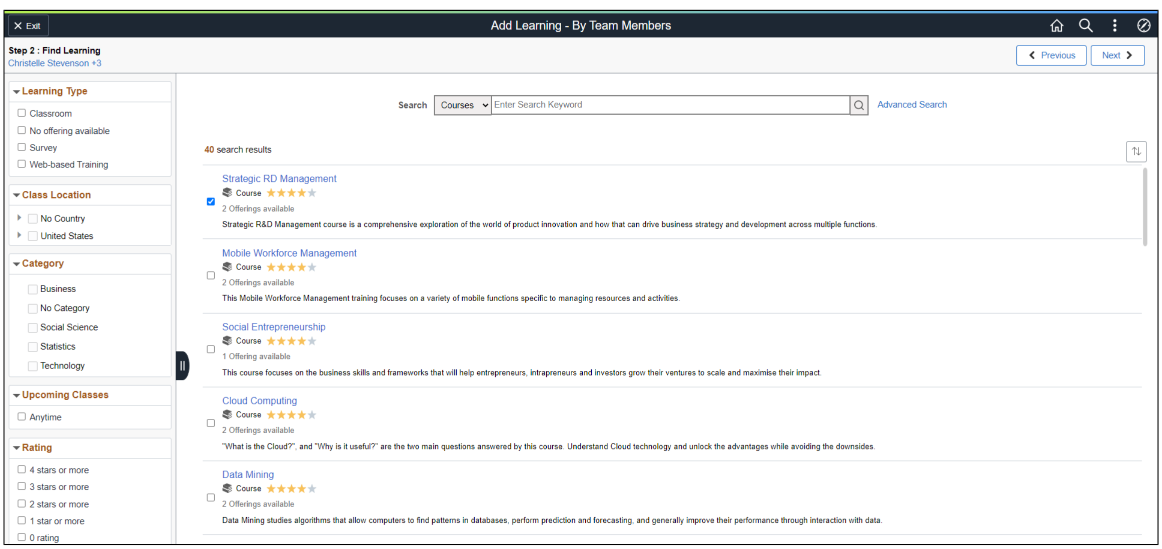
Field or Control	***Description***
Search By	Enter a keyword to search for team members by name, title, or department. **Note:** The manager can only search for his team members (direct reports). To view the direct reports of any of his team members, use the <Number> Directs link displayed in the team member row.
	Click to search for and view the list of team members that meet the search criteria.
Clear Search	Click to clear the search text entered in the **Search By** field.
(Select All) or (Select) check box	Select the check box in the header to select all the team member rows. Select the check box corresponding to each row to select individual team members.
	Click to sort the rows by Employee ID, Learner Name, Job Title, Department, Type or Directs. A colored sort icon button indicates that you have specified one of these grid sorts.
Employee Photo	Displays the photo of the team member.

Field or Control	***Description***
<Number> Directs link	When a team member has direct reports, the number of this person's direct reports appear as a link at the bottom left of the person's row. Click the link to drill down and have the page display a list of this person's direct reports. When managers drill down into the reporting hierarchy, breadcrumbs appear above the Team Members grid to show the management hierarchy from the user to the currently displayed group of employees. Select a person's name in the breadcrumbs to navigate back to that person's list of direct reports. When managers view their own direct reports, no breadcrumbs appear.

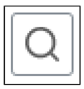
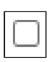
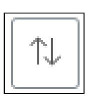
Step 2 : Find Learning

Use the Step 2 : Find Learning page (LM_FND_LRN_RSLT_FL) to view and assign the learnings (courses or programs) for your selected team members.

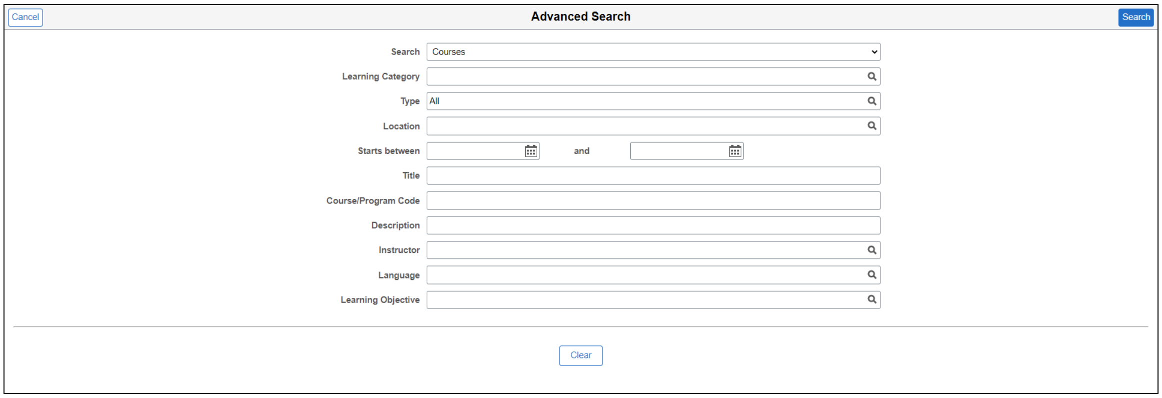
This example illustrates the fields and controls on the Step 2: Find Learning page.



This page displays all the available courses and programs for the team members. You can narrow down your search by entering a search keyword. Use Advanced Search to search with additional search criteria. The managers can search for and select one or multiple courses or programs.

Field or Control	***Description***
<Team member name> + <n-1>	Click to view the selected team members in a modal window. The link displays the team member's name (the one selected first in the previous page), and (n-1), where n is the total number of selected team members.
Search	Enter a keyword to search for learnings. Select **Courses** or **Programs** from the Search drop down to search individually by courses or programs.
	Click to view results of your learning searches.
Advanced Search	Click to search for courses or programs using advanced criteria. To know more, refer Advanced Search Page
Left facet	The left panel of the page enables you to quickly filter your search results by **Learning Type**, **Class Location**, **Category**, **Upcoming Classes** and **Rating**. Select from the available options to view the learnings associated with that type.
Search Results	Each search result row displays the learning title, an icon and descriptor indicating whether the learning is a course or a program, star rating, description of the learning, and the number of class offerings (in case of courses). Click on the learning title to view the course details in a modal window.
	Select the check box corresponding to each row to assign a course or program for the selected team members.
	Click to sort the rows by Learning, Type, Mandatory, or Relevance. A colored sort icon button indicates that you have specified one of these grid sorts.

This example illustrates the fields and controls on the Advanced Search page.



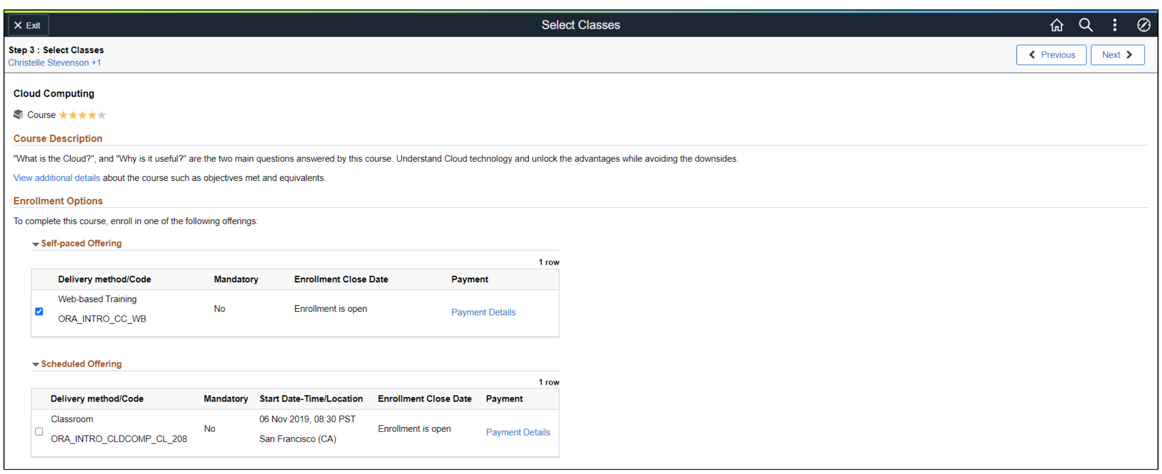
Select *Courses* or *Programs* in the **Search** to refine your search by courses or programs.

Step 3 : Select Classes

Use the Step 3 : Select Classes page (LM_CI_ACT_DTLS_FL) to view and enroll in the classes for the selected courses.

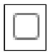
Note: This step is applicable only for courses. In case, you have selected programs for your team members, then the manager is taken directly to the **Review and Confirm** step.

This example illustrates the fields and controls on the Step 3 : Select Classes Page.



This page displays the available classes to enroll your selected team members. The page lists the self-paced and scheduled offerings for the course. If you meet the prerequisites for this course, you can enroll in the offerings in this page. You can select one or more offerings for your team members.

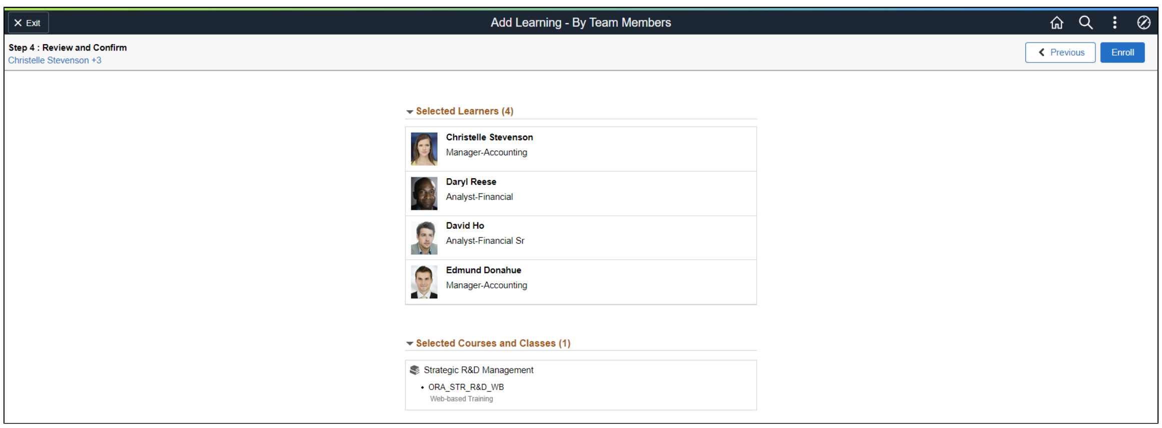
Field or Control	***Description***
View additional details	Click to view the abstract, the objectives met, and the prerequisites of the course in a modal window.

Field or Control	***Description***
	Select the check box corresponding to each row to add the course offering to the selected team members.
Payment Details	Click to view the pricing details of the course.

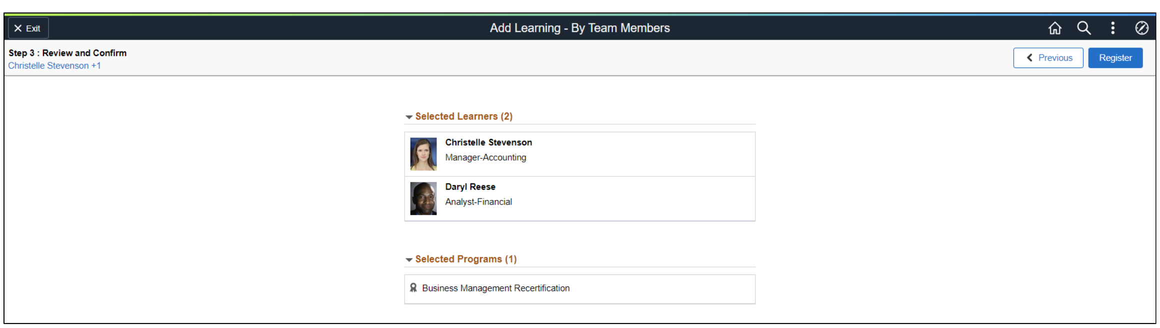
Step 4 : Review and Confirm

Use the Step 4 : Review and Confirm page (LM_MSS_REVIEW_FL) to review and confirm your team members and the assigned learnings.

This example illustrates the fields and controls on the Review and Confirm Page when the manager selects courses for team members.



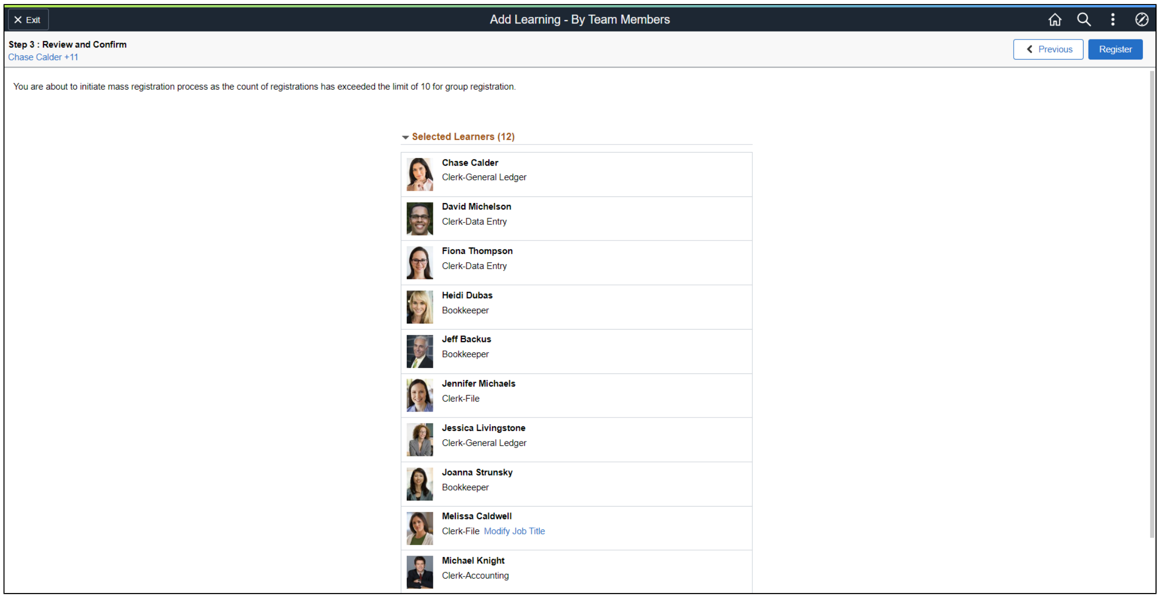
This example illustrates the fields and controls on the Review and Confirm Page when the manager selects programs for team members.



This page displays the selected team members and the selected courses or programs. In the case of courses, the system displays the opted classes as well. Click **Previous** to go back to previous steps and update the team members or courses or programs.

The system triggers a mass enrollment when the manager attempts to enroll or register more learners than the number specified in the **Group Enroll Maximum** field on the Install Defaults – Enrollment Page. A message displays below the header to indicate that you are about to begin a mass enrollment (course) or registration (program). Same applies when you try to enroll or register a learner to many courses or programs, and this number exceeds the threshold defined in **Group Enroll Maximum** field.

This example illustrates the fields and controls on the Review and Confirm Page when the manager is about to initiate a mass enrollment.

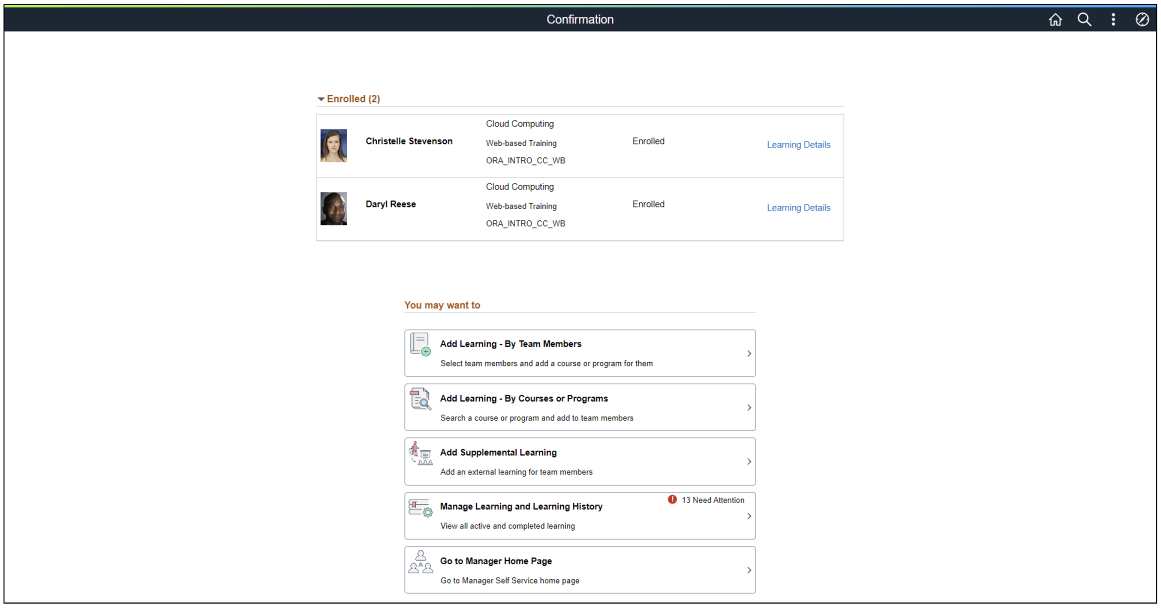


Field or Control	***Description***
Enroll	Click to enroll in a course.
Register	Click to register in a program.
Modify Job Title	Click to select the Job Title of the learner. This field appears to the right of the learner's job title in the Selected Learners grid. Applicable only when the learner has multiple job titles.

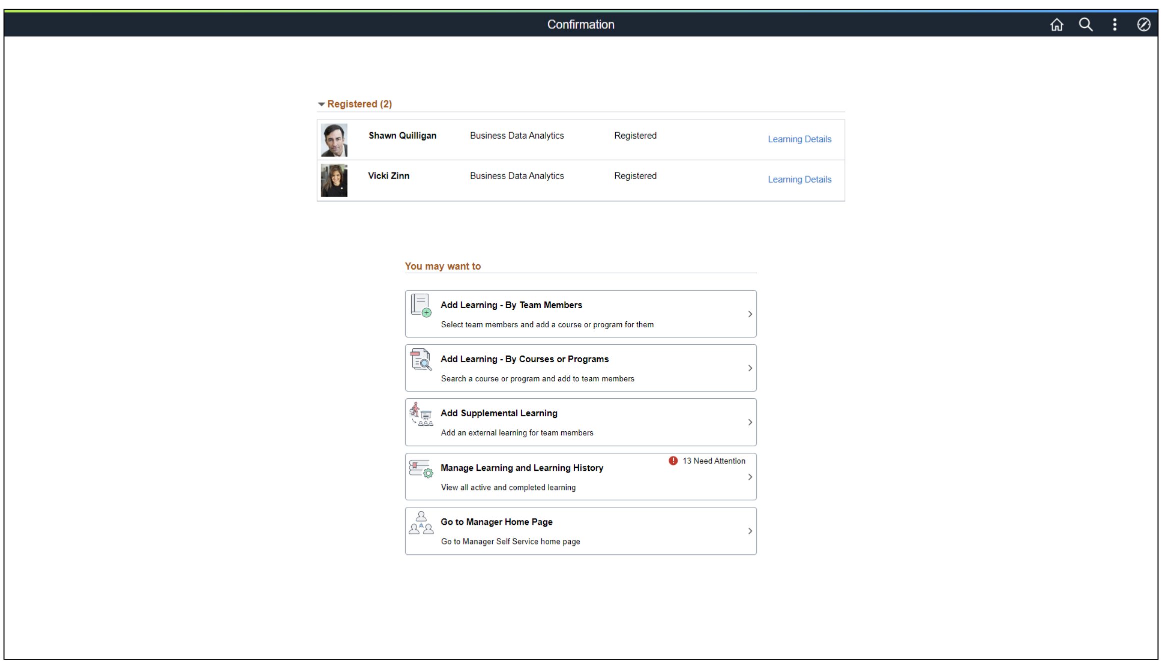
Confirmation

Use the Confirmation page (LM_MSS_CONFIRM_FL) to view the learners that are enrolled or registered to the courses or the programs.

This example illustrates the fields and controls on the Confirmation Page when the team members are enrolled to the selected courses.



This example illustrates the fields and controls on the Confirmation Page when the team members are registered to the selected programs.



This page displays the enrolled (for course) or registered (for program) learners under the **Enrolled (n)** or **Registered (n)** sections, where n is the total number of learners enrolled or registered in the course or the program. Each row under this section displays the photo of the team member, the team member's name, the name of the course or program, enrollment or registration status, and a **Learning Details** link.

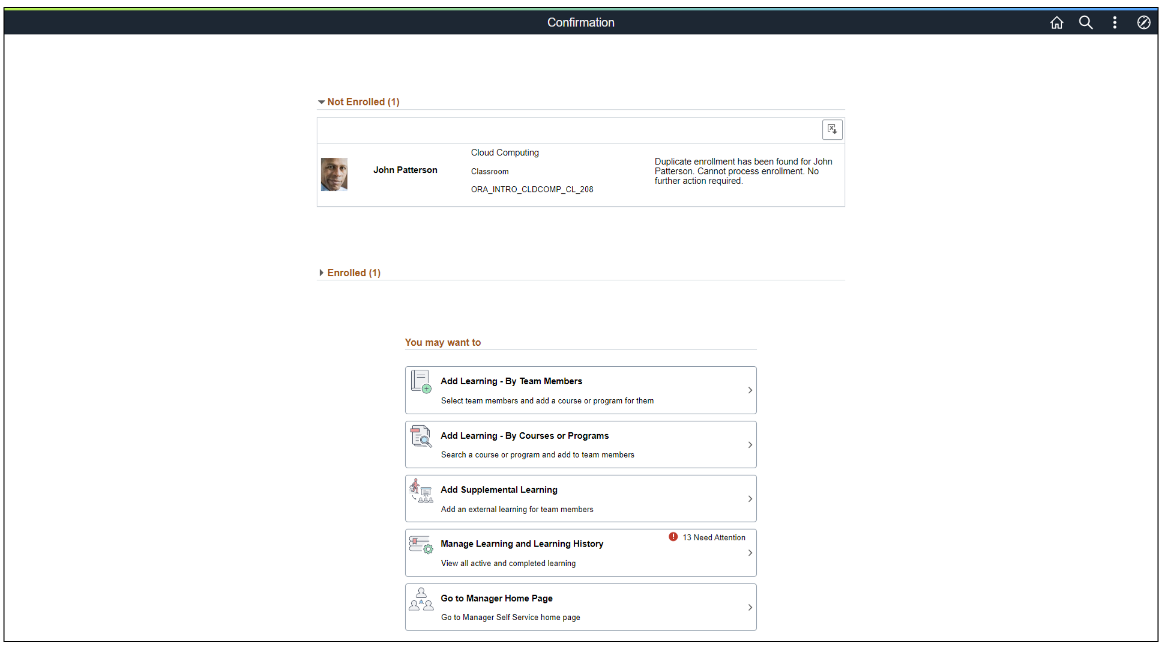
The manager can also perform the following actions from this page:

- Add Learning – By Team Members

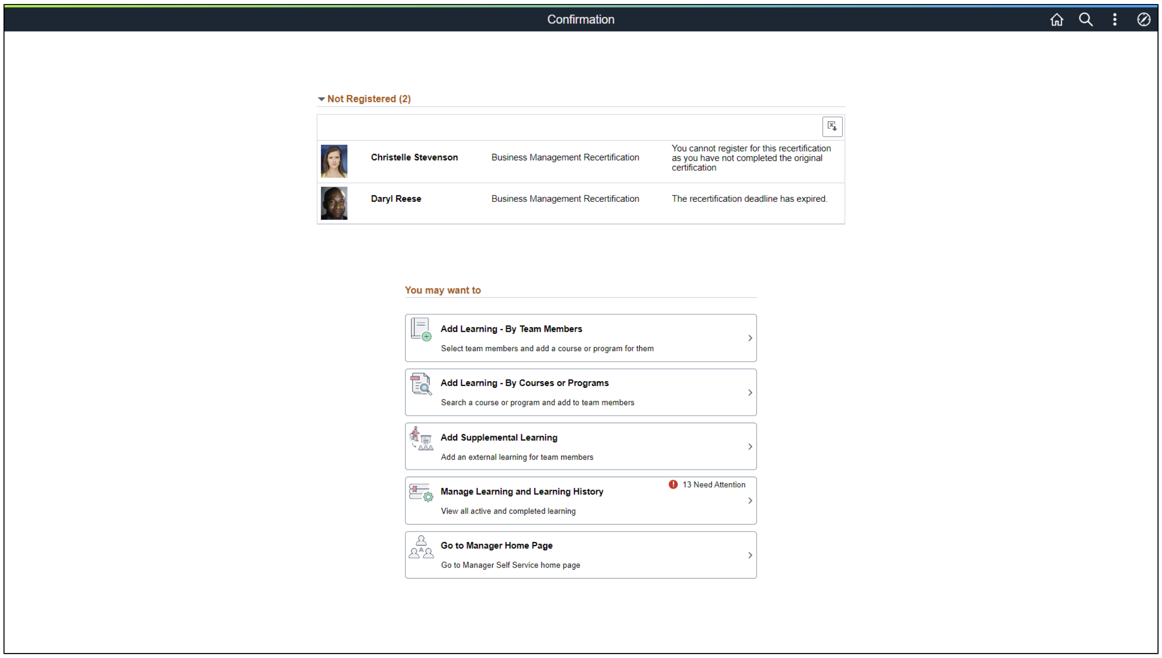
- Add Learning – By Courses or Programs
- Add Supplemental Learning
- Manage Learning and Learning History
- Go to Manager Home Page

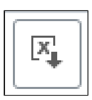
The team members that are not enrolled in the course are displayed under the **Not Enrolled (n)** section. The team members that are not registered in the program are displayed under the **Not Registered (n)** section, where n is the total number of team members not registered in the program. Each row under this section displays the photo of the team member, the team member's name, the name of the course or program, and reason for non-registration or non-enrollment. In this case, the **Enrolled** and **Registered** sections are collapsed by default. Click to expand to view the enrolled or registered members.

This example illustrates the fields and controls on the Confirmation Page when the team members are not enrolled to the selected courses.

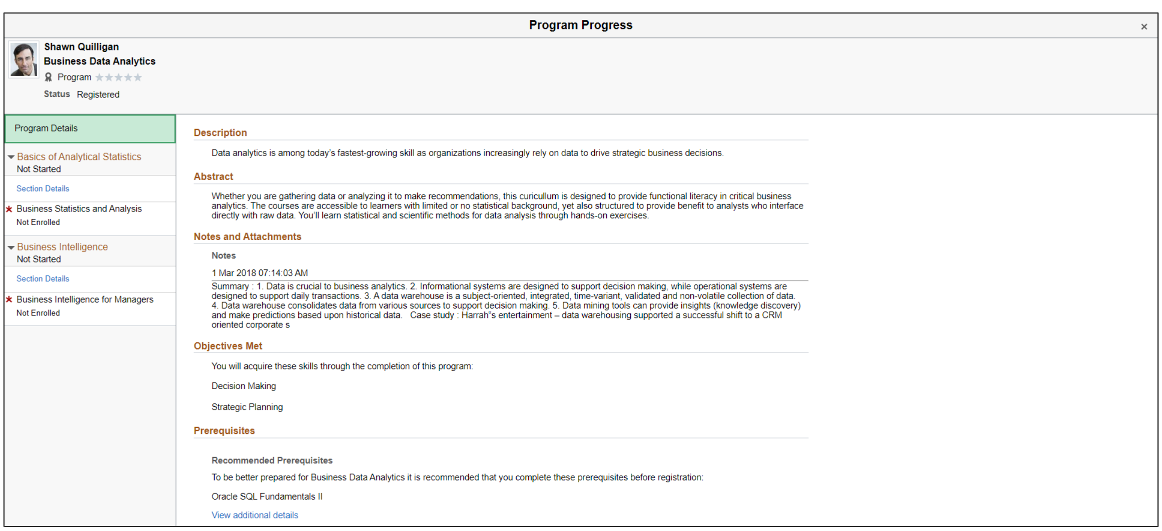


This example illustrates the fields and controls on the Confirmation Page when the team members are not registered to the selected programs.

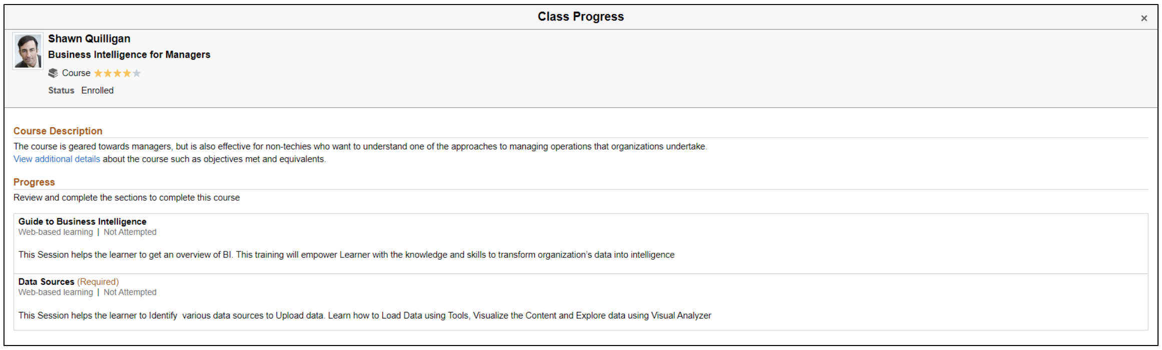


Field or Control	***Description***
Learning Details	Click to view the learning progress of the selected team member for the course or program.
	Click to download the list of team members not registered or enrolled to an excel.

This example illustrates the fields and controls on the Program Progress Page when the user clicks on the Learning Details link under the Registered (n) section.



This example illustrates the fields and controls on the Class Progress Page when the user clicks on the Learning Details link under the Enrolled (n) section.



Add Learning – By Courses or Programs

Use the Add Learning – By Courses or Programs (LM_FND_LRN_RSLT_FL) page to search a learning (course or program) and assign to your team members.

Navigation:

Manager Self Service > **Team Learning** > **Add Learning – By Courses or Programs**

The Add Learning – By Courses or Programs page allows the managers to assign the learning to the team members through a series of steps:

1. Step 1: Find Learning
2. Step 2: Select Classes
3. Step 3: Select Team Members
4. Step 4: Review and Confirm
5. Confirmation

Note: The **Add Learning – By Courses or Programs** action is similar to the **Add Learning – By Team Members** action, the only difference is in the sequence of the steps. To know details on each step, refer Add Learning – By Team Members

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Add Supplemental Learning

Use the Add Supplemental Learning (LM_MSS_TEAM_FL) page to add external learning for your team members (learners).

Navigation:

Manager Self Service > **Team Learning** > **Add Supplemental Learning**

This page allows the managers to add supplemental learning for the team members through a series of steps:

1. Step 1: Select Team Members

2. Step 2: Add Supplemental Learning

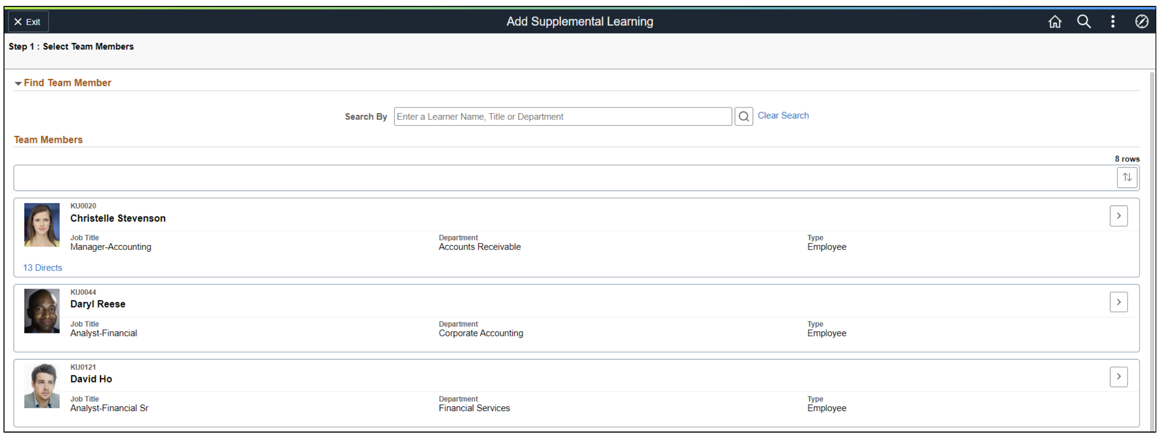
3. Confirmation

Use the **Previous** and **Next** buttons to navigate through the steps.

Step 1 : Select Team Members

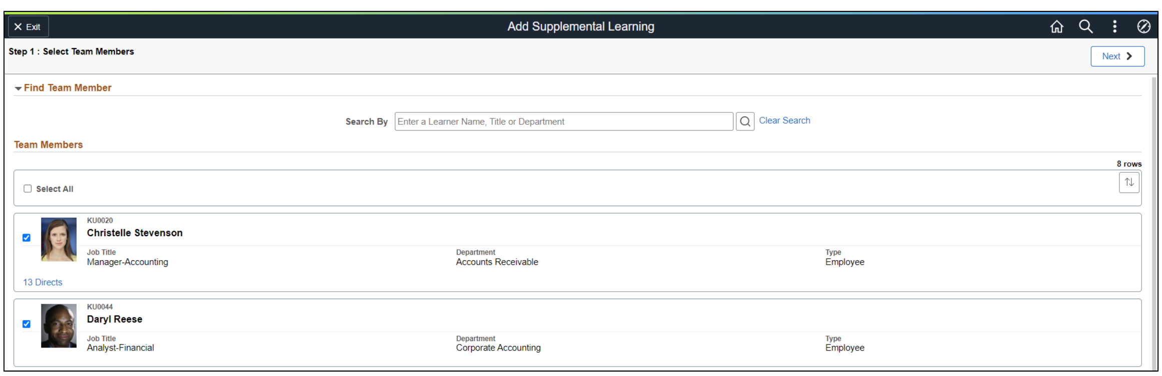
Use the Step 1 : Select Team Member (LM_MSS_TEAM_FL) page to search for and select the team members to add supplementary learning.

This example illustrates the fields and controls on the Step 1: Select Team Members page.

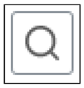
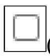
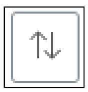
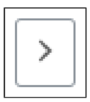


To allow supplemental learning for multiple learners, select the Supplemental Group Enrollment check box on the Install Defaults – Enrollment Page.

This example illustrates the fields and controls on the Step 1: Select Team Members page when group enrollment is enabled.



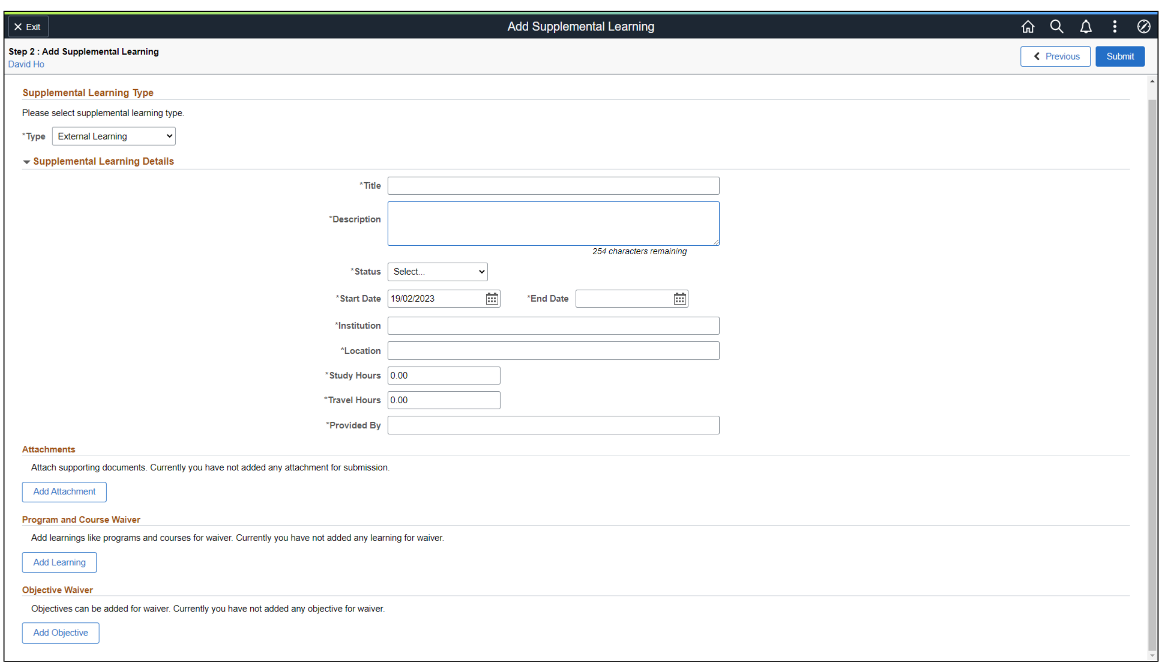
Field or Control	***Description***
Search By	Enter a keyword to search for team members by Name, Title, or Department.

Field or Control	***Description***
	Click to search for and view the list of team members that meet the search criteria.
Clear Search	Click to clear the search text entered in the **Search By** field.
(Select All) or (Select) check box	Select the check box in the header to select all the team member rows. Select the check box corresponding to each row to select individual team members.
	Click to sort the rows by Employee ID, Learner Name, Job Title, Department, Type or Directs. A colored sort icon button indicates that you have specified one of these grid sorts.
	Click to go to the **Step 2: Add Supplemental Learning** page. This icon is not available when group enrollment is enabled.

Step 2: Add Supplemental Learning

Use the Step 2: Add Supplemental Learning (LM_SUPP_LNR_ADD_FL) page to add supplemental learning for the selected team member.

This example illustrates the fields and controls on the Step 2: Add Supplemental Learning page.

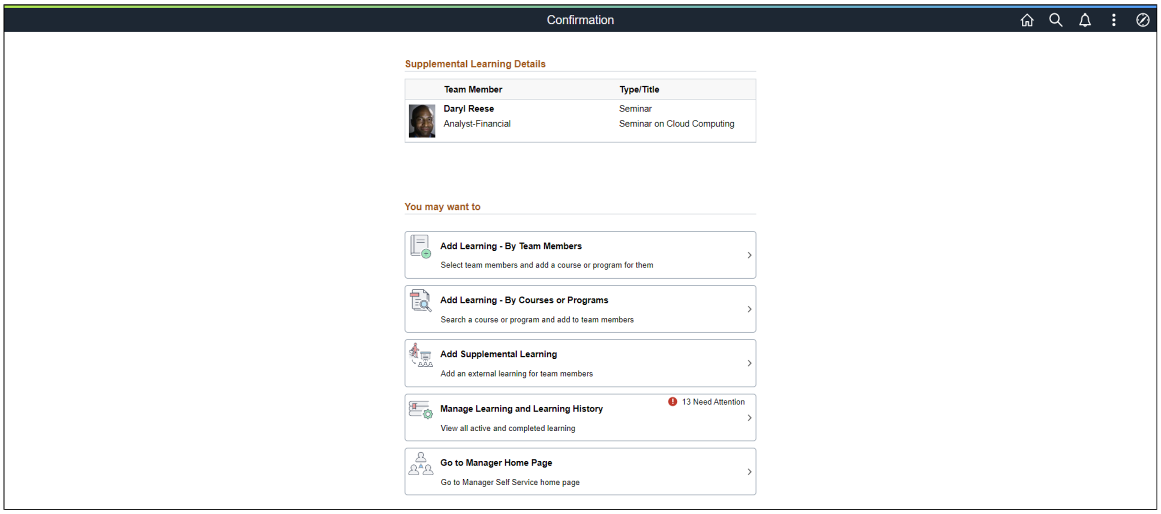


To know more, see Add Supplemental Learning.

Confirmation

Use the Confirmation (LM_SUPP_CONFIRM_FL) page to view a summary of the learners and their supplementary learning.

This example illustrates the fields and controls on the Confirmation – Add Supplemental Learning page.



The manager can also perform the following actions from this page:

- Add Learning – By Team Members
- Add Learning – By Courses or Programs
- Add Supplemental Learning
- Manage Learning and Learning History
- Go to Manager Home Page

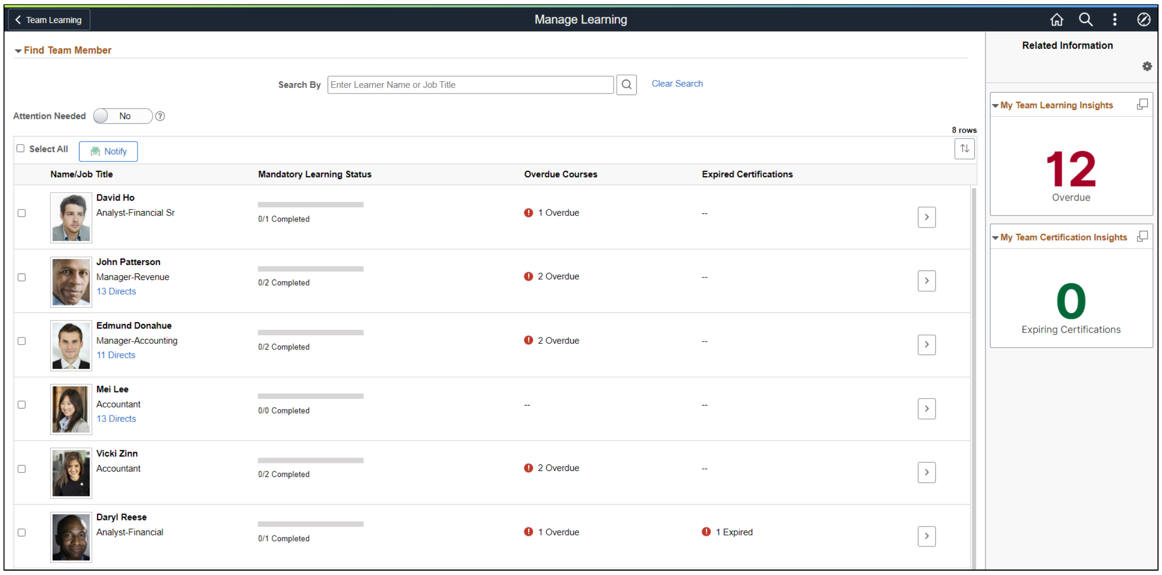
Manage Learning and Learning History

Use the Manage Learning (LM_MSS_LEARNING_FL) page to view your team members and access the learning details page.

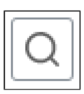
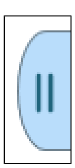
Navigation:

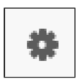
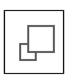
Manager Self Service > **Team Learning** > **Manage Learning and Learning History**

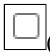
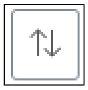
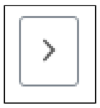
This example illustrates the fields and controls on the Manage Learning page.



This page allows the managers to view the learning status of their direct reports (team members). They can also review the learnings that need attention, such as the learnings that are overdue or expired. The related information panel on the right helps to view and analyze the learning analytics.

Field or Control	***Description***
Search By	Enter a keyword to search for team members by Name, or Title.
	Click to view the team members that meet the search criteria.
Clear Search	Click to clear the search text entered in the **Search By** field.
Attention Needed slider	Click to filter the search results by the learners with overdue (course) or expired (certification) learnings. By default, the slider is set to *No*.
	Click to view the help text for **Attention Needed** slider.
Notify	Click to send alert or email to selected team members.
	Click to open the Related Information panel and view the related content.

Field or Control	***Description***
Related Information	The Related Information is displayed as a supplementary panel on the right. it includes the following related content: • **My Team Learning Insights** Click the *Display My Team Learning Insights in Modal Window* icon to open the Team Learning Insights in a modal window and analyze the enrollment details of the team members. • **My Team Certification Insights** Click the *Display My Team Certification Insights in Modal Window* icon to open the Team Certification Insights in a modal window and analyze the certification details of the team members. **Note:** The dashboard displays data for the logged-in user (manager), even if the manager navigates to the team view of any of his directs.
	This icon appears at the top right of the Related Information panel. Click to open the Personalize page. This page lists the available related content so you can choose whether the Related Information panel shows or hides each item.
	This icon appears at the top of each individual related content item in the Related Information panel. Click to open a modal dialog with a larger interactive version of the content.
Team members grid	Each row in the grid displays the name, photo, job title, mandatory learning status, overdue courses, and expired certifications. Click on the chevron to view the learning details of the team member. If a course or certification is overdue or expired, then an alert icon appears along with the number of days the learning is overdue or expired. When a team member has direct reports, the number of this person's direct reports appear as a link at the bottom left of the person's row. Click to view the Manage Learning page for the directs. Breadcrumbs appear above the Team Members grid to show the management hierarchy from the user to the currently displayed group of employees. Select a person's name in the breadcrumbs to navigate back to that person's list of direct reports. **Note:** The manager can view only his team members (directs) who has a learning associated. Enrollments of the directs of the team members are not available in the Manage Learning page. To view the enrollments of any directs of the team members, the manager has to search for the team member and select the **n Directs** link.

Field or Control	*Description*
(Select All) or (Select) check box	Select the check box in the header of the team members grid to select all the team member rows. Select the check box corresponding to each row to select individual team members.
	Click to sort the rows by name, title, or directs.
	Click to view the Manage Learning – Details page for the team member.

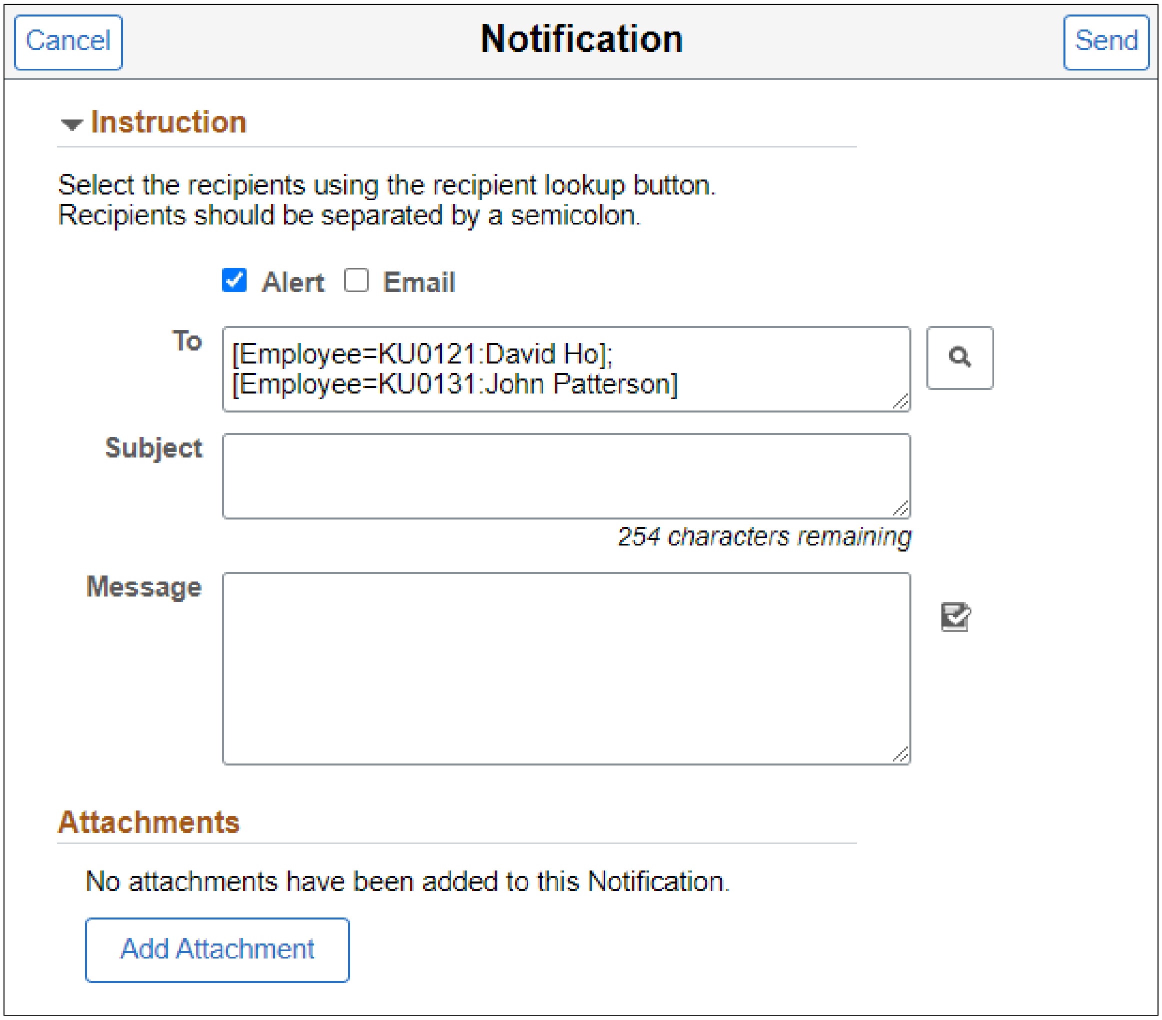
Notify

Use the Notify page (LM_NOTIF_ADH_FLU) to compose and send notifications (alert or email) to the selected team members.

Navigation:

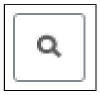
Click **Notify** button in the Manage Learning page.

This example illustrates the fields and controls on the Notification page.



Select the type of notification to be delivered to the intended recipients. Options include using an alert, an email, or combination of both

Field or Control	***Description***
Alert	Select this option to post an alert to the recipients.
Email	Select this option to email messages to recipient's mailboxes. When you select this option, the **CC/BCC** field becomes available.
CC/BCC	This check box is enabled when you select **Email** as a delivery method. Select this option to show the CC and BCC fields to copy other individuals on the email notification.

Field or Control	***Description***
	Click to search for recipients to send notification.
To, CC, or **BCC**	Select recipients for the notification using the Recipient lookup icon. The selected recipients are populated in the **To**, **CC**, or **BCC** fields.
Subject	Enter the subject of the notification. This Alerts page will display the subject line on the Notification window of fluid.
Message	Enter the content of the notification.
	Click to spell check the message text.
Add Attachment (button)	Click to upload a file attachment to the notification.
Send (button)	Click to send the notification.
Cancel (button)	Click to cancel the notification.

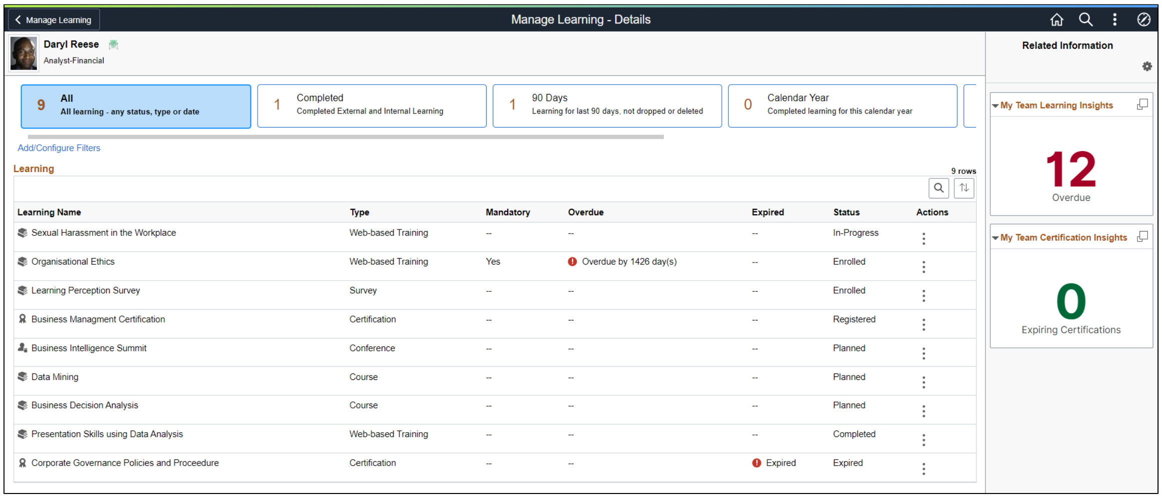
Manage Learning – Details

Use the Manage Learning – Details (LM_LEARNING_DTL_FL) page to review all the learnings (class, program, or supplemental learning) for a selected team member.

Navigation:

- **Manager Self Service** > **Team Learning** > **Manage Learning and Learning History**
- Click the chevron for a team member to view his learning details.

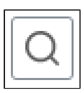
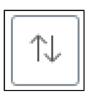
This example illustrates the fields and controls on the Manage Learning – Details page.



The Manage Learning – Details page allows the managers to view the list of classes that the team members are enrolled in and curricula and certifications for which they are registered. Managers can view the details, the progress status, and the schedules for the learning. They can also enroll or drop the learner from the classes and programs, or modify the learning requests.

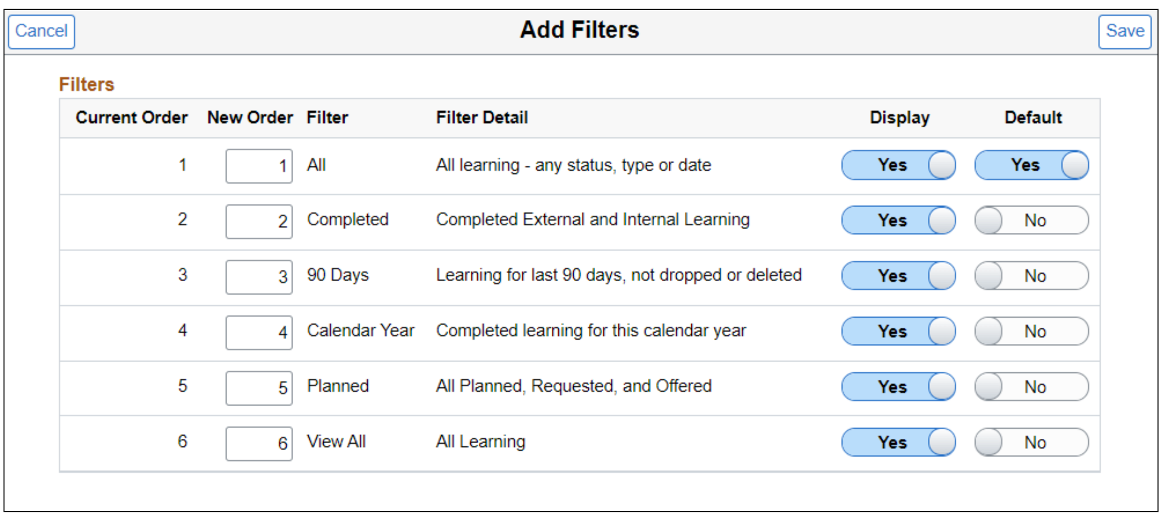
Note: If a learner is enrolled in more than one class for the same course, then multiple rows are displayed in the Manage Learning – Details page.

Field or Control	***Description***
Header section	The page header displays the name, the job title and the photo of the selected learner.
	Click to send alert or message to the learner.
Search filters	Click to view the learnings in the learning grid by the pre-defined filter.The search filters appear on the top of the page below the header section. The filter shows the count of matching results along with the short description and the description defined in the Learning Filter Page. By default, the filter **All** is selected. The **All** filter displays the learnings of any type, status, and date.
Add/Configure Filters	Click to define the display conditions for the pre-defined search filters.

Field or Control	***Description***
Learning grid	Each row in the Learning grid displays the learning name, the type (class, program or supplemental learning), indicators to show if the learning is mandatory, overdue or expired, the learning status and the actions for the learning. If a learning is expired or overdue, then the system displays an alert icon along with the number of days the learning is expired or overdue. The available options for status includes *Planned*, *Enrolled*, *Registered*, *In-Progress*, *Waived*, *Expired*, *Completed*, and *Not Completed*. Based on the learning type and the status, the managers can perform the following actions: • View Details • View History • Select Class and Enroll • Modify • Recertify • Drop • Delete
	Click to search the learning grid by a search keyword.
	Click to sort the learning grid by learning name, type, or status.

Field or Control	***Description***
Related Information	For Manage Learning – Details, this supplementary pane includes the following related content: • **My Team Learning Insights** Click the *Display My Team Learning Insights in Modal Window* icon to open the Team Learning Insights in a modal window and analyze the enrollment details of the team members. • **My Team Certification Insights** Click the *Display My Team Certification Insights in Modal Window* icon to open the Team Certification Insights in a modal window and analyze the certification details of the team members. **Note:** The dashboard displays data for the logged-in user (manager), even if the manager navigates to the team view of any of his directs.

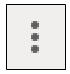
This example illustrates the fields and controls on the Add Filter page when manager clicks on Add/ Configure Filters link.



Field or Control	***Description***
New Order	Enter a number to define the order of display of the filters.
Display	Click to enable the display of the filter.
Default	Click to set the filter as default. The learning grid displays the learnings based on the default filter.

Actions

The Manage Learning – Details page allows the manager to perform different actions based on the type of learning and its status.

Navigate to the Manage Learning – Details page and click the chevron for any team member to view the learning details. Click the  button for a learning to view the actions.

Managers can perform the following actions:

- View Details
- View History
- Select Class and Enroll
- Register
- Modify
- Recertify
- View Approval Request
- Drop
- Delete

Field or Control	***Description***
View Details	Click to view the details and the progress of the learning (course, program, or supplemental learning). This action is available for all the learnings of any type or status.
View History	Click to view the history of the certification. The modal page displays the learning statuses and the status change date for the learning. This action is available when the status of the certification is *Expired*.
Select Class and Enroll	Click to go to the Course page, view the enrollment options, and enroll to a preferred class. This action is available when the status of the course is *Planned*. **Note:** Managers can enroll the learners to only one class per course.
Register	Click to go to the Program page, view the program details and register to the program. This action is available when the status of the program is *Planned*.

Field or Control	*Description*
Modify	Click to update the details of the supplementary learning. This action is available for supplementary learnings with status *Planned*, *In-Progress*, or *Pending Approval*.
Recertify	Click to view the details of the recertification programs and register to the program. Notification is sent to the learner on successful registration. This action is available when the status of the program is *Expired*.
View Approval Request	Click to view the learning page with the approval chain. If the approval is pending with the logged-in manager, the system displays the option to approve or deny the learning request. Click the **Approval Chain** to view the approval workflow and the reviewer with whom the request is pending.
Drop	Click to drop the learner from the learning. System displays a warning to confirm the drop action. This action is available when the status of the learning (course or program) is *Enrolled*, *Registered*, *In-Progress*, or *Pending Approval*.
Delete	Click to delete the learning for the learner. System displays a warning to confirm the delete action. This action is available when the status of the learning (course or program) is *Planned*.

Using the PeopleSoft Fluid Interface To Manage Team Objectives

This topic describes how to use the PeopleSoft Fluid Interface to assign and review objectives for your team members.

Pages Used to Manage Team Objectives Using the PeopleSoft Fluid User Interface

This section discusses on the pages used to manage team objectives.

Page Name	*Definition Name*	*Usage*
Manage Team Objectives Page	LM_MSS_HM_FL	Access the Manage Team Objectives homepage to assign and review the objectives for the team.

Page Name	***Definition Name***	***Usage***
Assign Objectives	LM_MSS_TEAM_FL	Search for team members and assign objectives for them.
Review All Objectives	LM_MSS_TEAM_OBJ_FL	Review ongoing and completed objectives for the team members.

User Access

User Role	***Access***
Learning Manager Fluid	Provides access to the Manage Team Objectives tile.

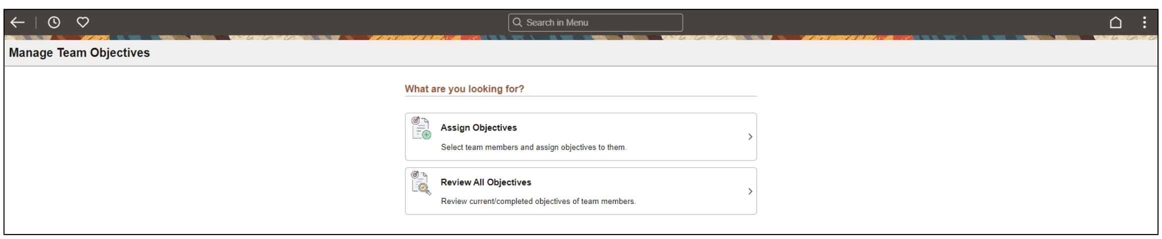
Manage Team Objectives Page

Use the Manage Team Objectives page (LM_MSS_HM_FL) to assign and review the objectives for your team members.

Navigation:

Manager Self Service > **Manage Team Objectives**

This example illustrates the fields and controls on the Manage Team Objectives page.



Manage Team Objectives Pages

The Manage Team Objectives page provides the following actions for the logged-in manager:

- Assign Objectives
- Review All Objectives

If the manager does not have any direct reports, then all the actions on the Manage Team Objectives homepage are disabled.

Assign Objectives

Use the Assign Objectives (LM_MSS_TEAM_FL) page to select the team members (learners) and assign objectives for them.

Navigation:

Manager Self Service > **Manage Team Objectives** > **Assign Objectives**

The Assign Objectives page allows the managers to assign objectives to their team members through a four step guided process:

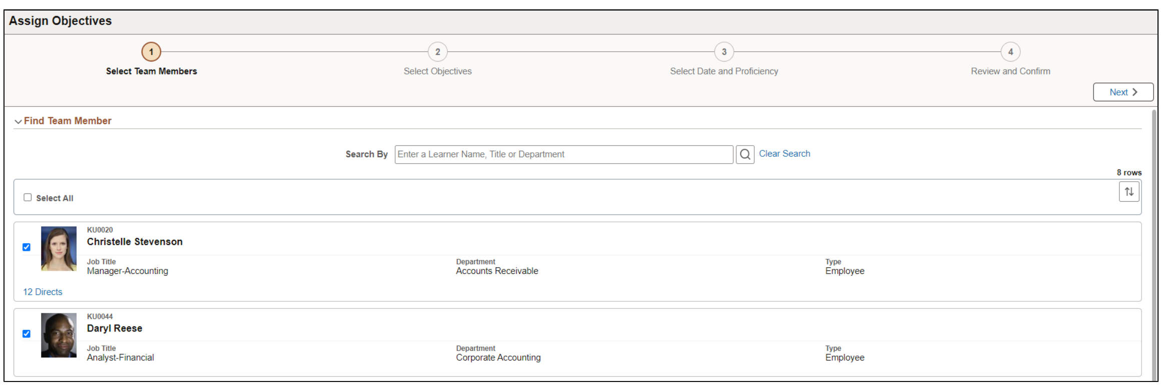
1. Select Team Members
2. Select Objectives
3. Select Date and Proficiency
4. Review and Confirm

Use the **Previous** and **Next** buttons to navigate through the steps. Also, the steps of the activity guide are displayed in a horizontal layout below the page header. You can select the step name to go to the corresponding step. A colored step number and step name indicates the step the manager is working on.

Select Team Members

Use the Select Team Member (LM_MSS_TEAM_FL) page to view a list of your direct reports and select one or more team members to assign objectives.

This example illustrates the fields and controls on the Select Team Members page.



This page displays all your direct reports and provides an option to view their directs (if any) by clicking on the **n Directs** link below the profile photo of your direct report. User can only view their directs and direct reports of those directs (next level). Expand the **Find Team Member** section to narrow the search for your team members. Select one or more team members from the **Team Members** grid and click **Next** button to go to the **Select Objectives** page.

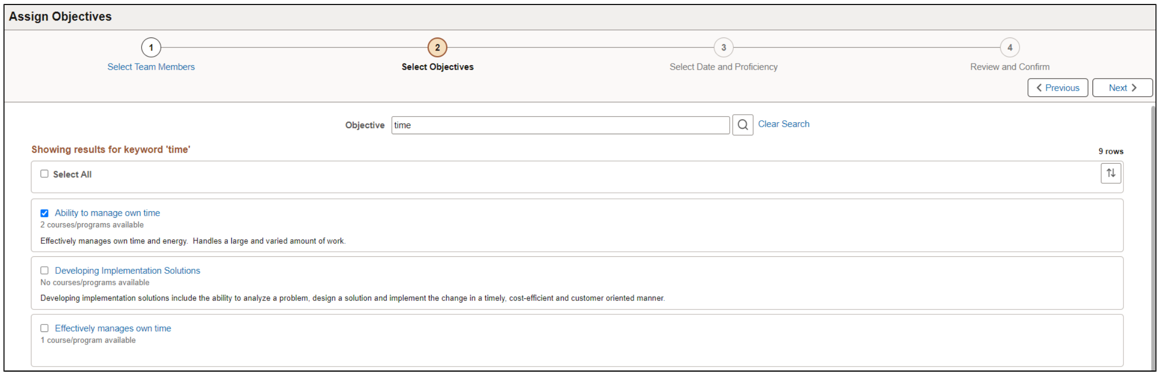
Note: The manager should select atleast one team member to proceed to the next step.

For more information on the Team Members page, see Add Learning – By Team Members.

Select Objectives

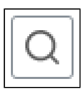
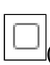
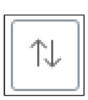
Use the Select Objectives page (LM_OBJV_ADD_OBJ_FL) to view and assign the objectives for your selected team members.

This example illustrates the fields and controls on the Select Objectives page.



This page displays all the available objectives for the team members. You can narrow down your search by entering a search keyword. The managers can search for and select one or multiple objectives.

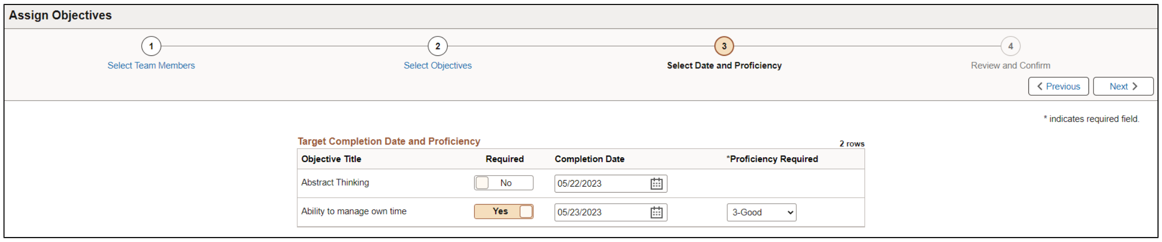
Note: The manager should select atleast one objective to proceed to the next step.

Field or Control	***Description***
Objective	Enter a keyword to search for required objectives.
	Click to view results of your searches.
Clear Search	Click to clear the search text entered in the **Search By** field.
Search Results	Each search result row displays the objective title, the number of learnings associated with the objective (across all learning environments), and the description of the objective. Select the objective title to view the details in a modal window. Details include the objective code, the learnings that meet the objective, and the proficiency associated with the learning.
(Select All) or (Select) check box	Select the check box in the header to select all the rows. Select the check box corresponding to each row to assign that objective for the selected team members.
	Click to sort the rows by Objective Title, or Number of Courses or Programs. A colored sort icon button indicates that you have specified one of these grid sorts.

Select Date and Proficiency

Use the Select Date and Proficiency page (LM_OBJV_DT_PROF_FL) to assign completion date and proficiency for the selected objectives.

This example illustrates the fields and controls on the Select Date and Proficiency Page.



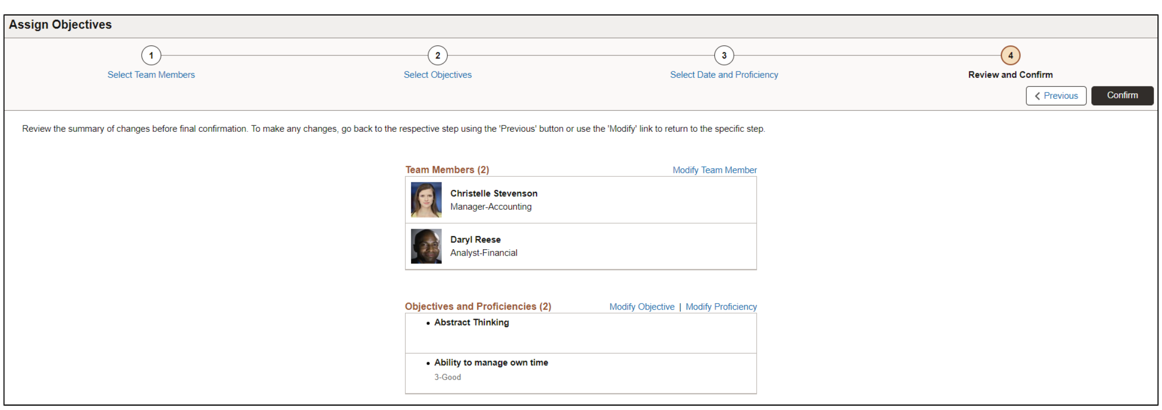
This page displays the selected objectives and allows managers to assign a completion date and proficiency for these objectives

Field or Control	***Description***
Required	Select to mark the objective as required. The default option is not required.
Completion Date	Select [calendar icon] to set the completion date for the objective. **Note:** If multiple objectives are selected in the previous step, the system displays a message if the same date should be auto filled for rest of objectives.
Proficiency Required	Select to add a proficiency for the objective. **Note:** This field is displayed only for objectives with a rating model.

Review and Confirm

Use the Review and Confirm page (LM_OBJV_REVIEW_FL) to review and confirm your team members and the assigned objectives.

This example illustrates the fields and controls on the Review and Confirm Page.



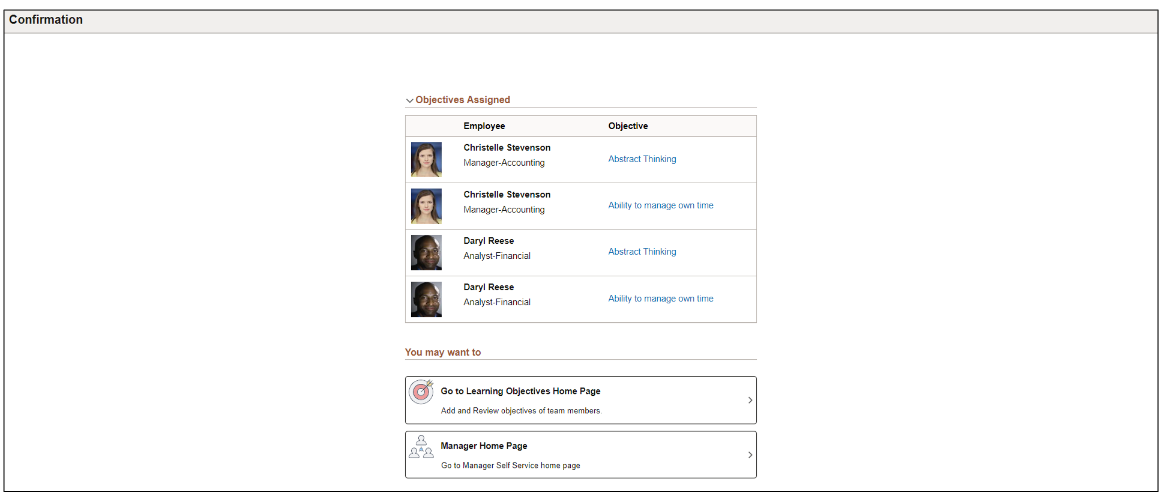
This page displays the selected team members and the selected objectives. Click **Previous** to go back to previous steps and update the team members or objectives. Click **Confirm** to save your selection and go to the Confirmation page. The system displays a warning if the objective is already assigned to the team member.

Field or Control	***Description***
Modify Team Member	Click to go to the **Select Team Members** step and modify the team members.
Modify Objective	Click to go to the **Select Objectives** step and modify the objectives.
Modify Proficiency	Click to go to the **Select Date and Proficiency** step and modify the completion date or proficiency.

Confirmation

Use the Confirmation page (LM_MSS_CONFIRM_FL) to view the team members (learners) and their assigned objectives.

This example illustrates the fields and controls on the Confirmation Page.



This page displays the learners and the assigned objectives under the **Objectives Assigned** section. Each row under this section displays the photo of the team member, the team member's name and job title, and the name of the objective. Select the objective name to view the details.

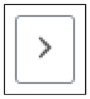
The manager can also perform the following actions from this page:

- Go to Learning Objectives Home Page
- Manager Home Page

Review All Objectives

Use the Review All Objectives (LM_MSS_TEAM_OBJ_FL) action to search for your team members and review their learning objectives.

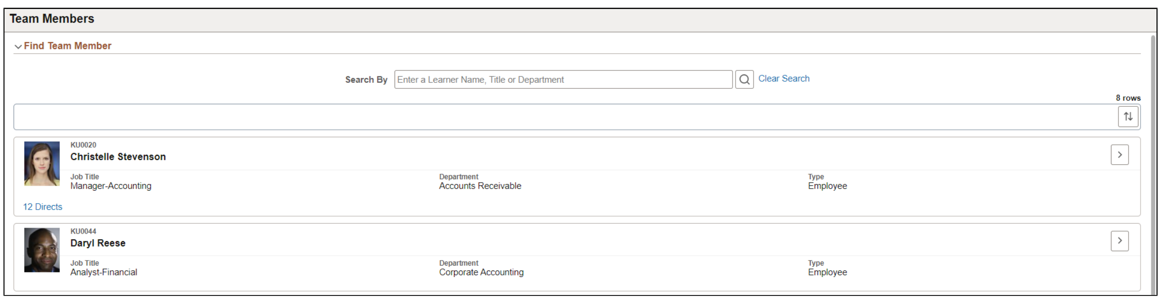
Navigation:

1. **Manager Self Service** > **Manage Team Objectives** > **Review All Objectives**
2. Search your team member from the **Team Members** page.
3. Select the  button for the corresponding team member row, to go to the **Objectives** page.

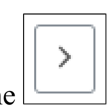
Team Members page

Use the Team Members page (LM_MSS_TEAM_OBJ_FL) to search for your team members.

This example illustrates the fields and controls on the Team Members page.



The Team Members page displays all your direct reports and provides an option to view their directs (if any) by clicking on the **<n> Directs** link below the profile photo of your direct report, where n is the number of team members. Click the link to drill down and have the page display a list of this person's direct reports. When managers drill down into the reporting hierarchy, breadcrumbs appear above the Team Members grid to show the management hierarchy from the user to the currently displayed group of employees. Select a person's name in the breadcrumbs to navigate back to that person's list of direct reports. When managers view their own direct reports, no breadcrumbs appear. The managers can only view their directs and direct reports of those directs (next level).

Expand the **Find Team Member** section to narrow the search for your team members. Click the  button for the corresponding team member row, to go to the **Objectives** page.

Objectives page

Use the Objectives page (LM_OBJV_MGR_FL) to review the learning objectives (current and completed) for your team members.

Managers can use the **Current Objectives** page to view the ongoing objectives for the selected team member, see who assigned the objective, delete or modify objectives, and search for learnings that satisfy the objectives and register or enroll your team member to the learning. (The Assigned By field identifies the source of the assignment, which can be a person or a system.) You can also assign a new objective.

Managers can view the learning progress of their direct reports (team members) and team members of their directs (one level only). The **Completed Objectives** tab displays the objectives that are completed by the team member.

For more information, see Manage Objectives Page.

Related Links

Using the PeopleSoft Fluid User Interface for Manager Self-Service

Using the PeopleSoft Fluid Interface For Team Learning

Using the PeopleSoft Fluid Interface To Manage Team Plans

This topic describes how managers can use the PeopleSoft Fluid Interface to add and review learning plans for your team members.

Pages Used to Manage Team Plans Using the PeopleSoft Fluid User Interface

This section discusses on the pages used to manage team plans.

Page Name	***Definition Name***	***Usage***
Manage Plans Page	LM_MSS_HM_FL	Access the Manage Plans homepage.
Manage Plans – By Team Members	LM_MSS_TEAM_FL	Search for team members and associate learnings (course or program) to a learning plan for them.
Manage Plans – By Courses or Programs	LM_FND_LRN_RSLT_FL	Search for learnings (course or program) and associate with learning plan of team members.
Review All Plans	LM_MSS_TEAM_OBJ_FL	Review current and completed plans of team members.

User Access

User Role	***Access***
Learning Manager Fluid	Provides access to the Manage Team Plans tile.

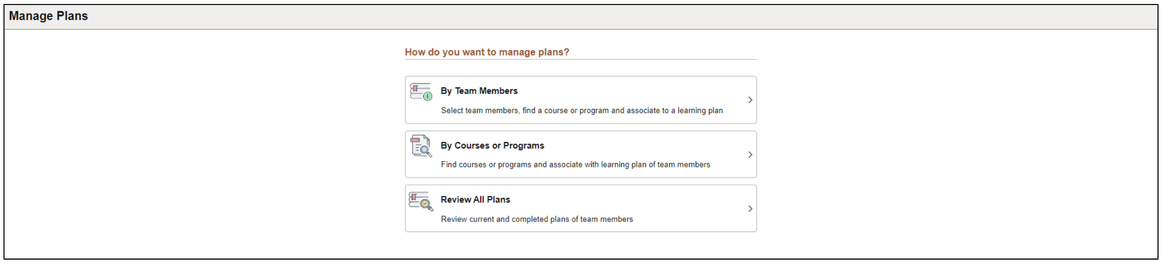
Manage Plans Page

Use the Manage Plans page (LM_MSS_HM_FL) to add and review learning plans for your team members.

Navigation:

Manager Self Service > **Manage Team Plans**

This example illustrates the fields and controls on the Manage Plans page.



The Manage Plans page provides the following actions for the logged-in manager:

- By Team Members
- By Courses or Programs
- Review All Plans

If the manager does not have any direct reports, then all the actions on the Manage Plans homepage are disabled.

Manage Plans – By Team Members

Use the Manage Plans – By Team Members (LM_MSS_TEAM_FL) page to select the team members (learners) and add learning plans for them.

Navigation:

Manager Self Service > **Manage Team Plans** > **By Team Members**

The Manage Plans – By Team Members page allows the managers to add learning plans for their team members through a five step guided process:

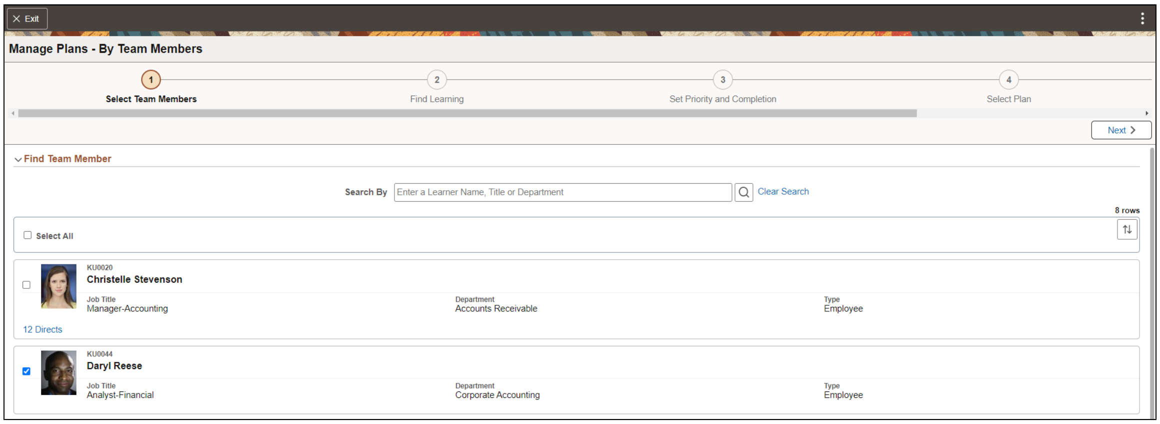
1. Select Team Members
2. Find Learning
3. Set Priority and Completion
4. Select Plan
5. Review and Confirm

Use the **Previous** and **Next** buttons to navigate through the steps.

Select Team Members

Use the Select Team Member (LM_MSS_TEAM_FL) page to view a list of your direct reports and select one or more team members to add them to learning plans.

This example illustrates the fields and controls on the Select Team Members page.



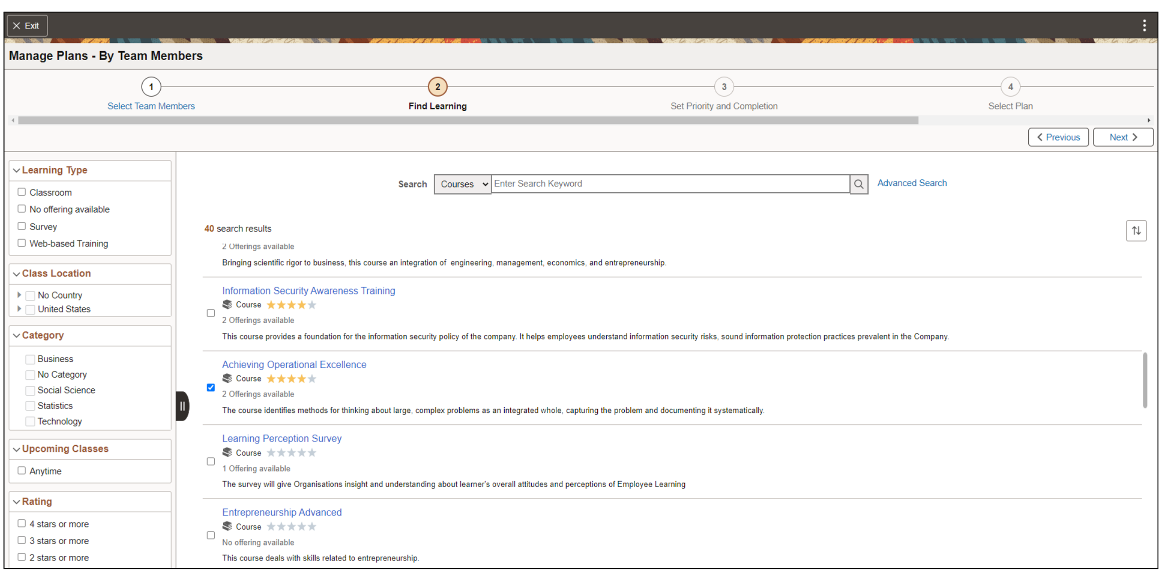
This page displays all your direct reports and provides an option to view their directs (if any) by clicking on the **<n> Directs** link below the profile photo of your direct report. User can only view their directs and direct reports of those directs (next level). Expand the **Find Team Member** section to narrow the search for your team members. Select one or more team members from the **Team Members** grid and click **Next** button to go to the **Find Learning** page.

For more information on the Team Members page, see <u>Add Learning – By Team Members</u>.

Find Learning

Use the Find Learning page (LM_FND_LRN_RSLT_FL) to view and assign the learnings (courses or programs) to a learning plan for your selected team members.

This example illustrates the fields and controls on the Find Learning page.



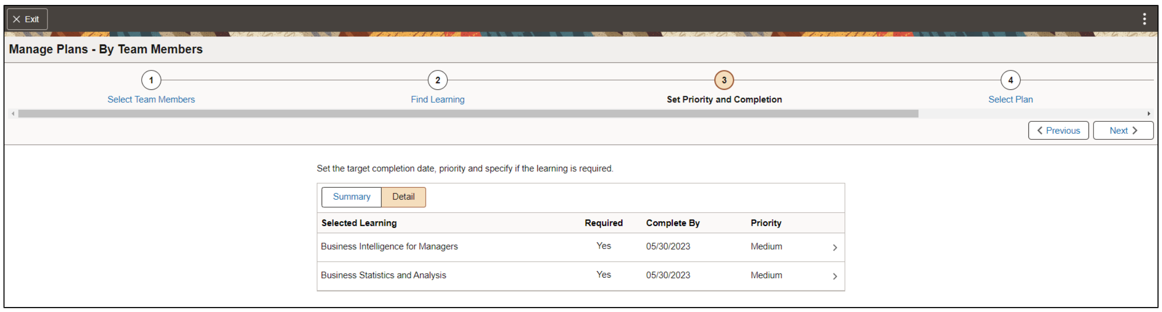
This page displays all the available courses and programs for the team members. You can narrow down your search by entering a search keyword. Use Advanced Search to search with additional search criteria. The managers can search for and select one or multiple courses or programs. The system displays a warning if you proceed to **Set Priority and Completion** step without selecting any learning.

For more information on the Find Learning page, see Add Learning – By Team Members.

Set Priority and Completion

Use the Set Priority and Completion page (LM_LPLN_SEL_DTL_FL) to assign additional details for the selected learning item (course or program).

This example illustrates the fields and controls on the Set Priority and Completion Page.



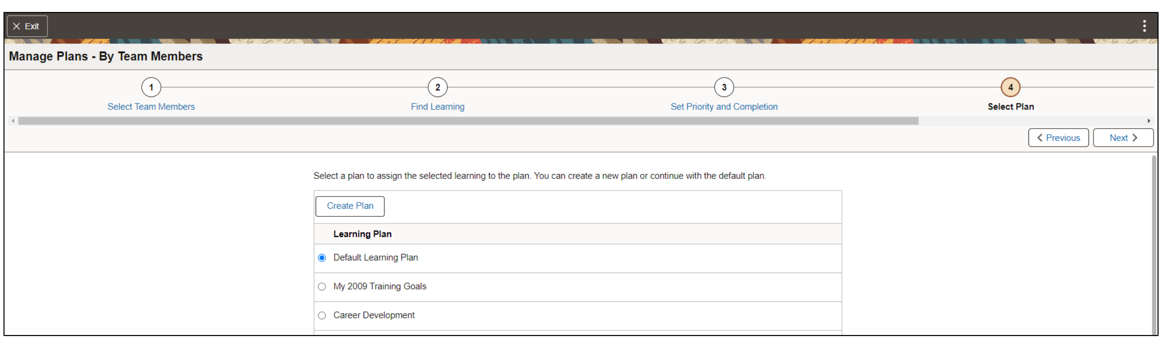
This page displays the selected learnings in a grid. Click the right chevron in each row to assign the details for the learning such as if the learning is required, complete by and the priority, The **Summary** tab lists the learnings. Click the **Detail** tab to view the **Required**, **Complete By** and **Priority** for the selected learnings.

To know more, see Edit Learning Item Page.

Select Plan

Use the Select Plan page (LM_LPLN_SEL_FL) to add selected learnings to a learning plan.

This example illustrates the fields and controls on the Select Plan Page.

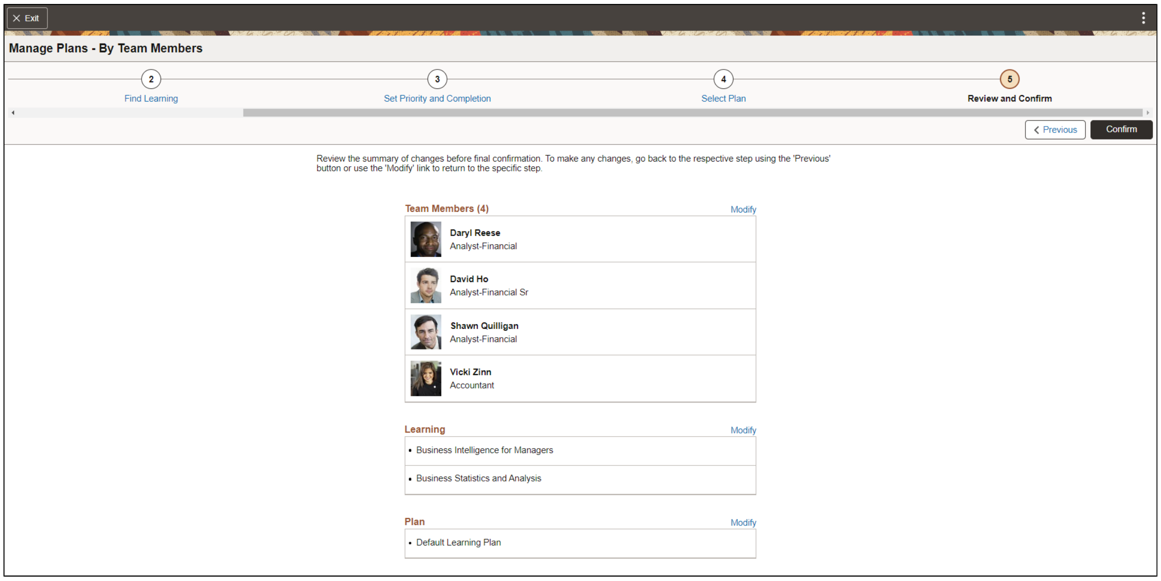


This page displays the available learning plans. Click **Create Plan** to create a new learning plan.

Review and Confirm

Use the Review and Confirm page (LM_LPLN_REVIEW_FL) to review the learnings and learning plan for your selected team members.

This example illustrates the fields and controls on the Review and Confirm Page.

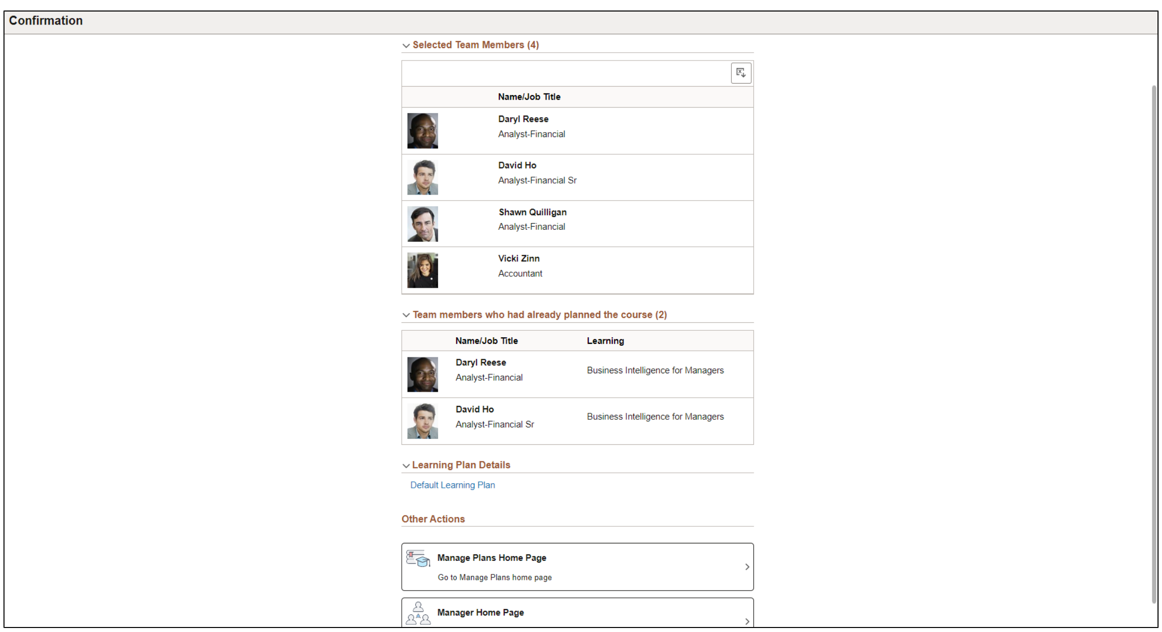


This page displays the selected team members, the assigned learnings and the learning plan as separate grids. Click **Modify** to the top right of each grid to go to respective page and make changes.

Confirmation

Use the Confirmation page (LM_MSS_LPLN_CNF_FL) to view the learning plan and the assigned learners.

This example illustrates the fields and controls on the Confirmation Page.

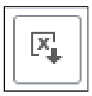


This page displays the selected learners under the **Selected Team Members (n)** section, where n is the total number of learners enrolled in the learning. Each row under this section displays the photo of the team member, the team member's name, their job title. If any of these team members have already planned the selected learning (course or program), then these members are also displayed under the **Team**

members who had already planned the course (n) or **Team members who had already planned the program (n)** section. The **Learning Plan Details** section displays the learning plan under which the learnings are added.

The manager can also perform the following actions from this page:

- Manage Plans Home Page
- Manager Home Page

Field or Control	***Description***
Learning plan name	Click to view the assigned learnings in a modal window.
	Click to download the list of team members associated with the learning plan.

Manage Plans – By Courses or Programs

Use the Manage Plans – By Courses or Programs (LM_FND_LRN_RSLT_FL) page to search for learnings (course or program) and associate with a learning plan of your team members.

Navigation:

Manager Self Service > **Manage Team Plans** > **By Courses or Programs**

The Manage Plans – By Courses or Programs page allows the managers to assign the selected learnings to a learning plan for your team members through a series of steps:

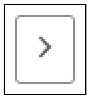
1. Find Learning
2. Set Priority and Completion
3. Select Plan
4. Select Team Members
5. Review and Confirm

Note: The **Manage Plans – By Courses or Programs** action is similar to the **Manage Plans – By Team Members** action, the only difference is in the sequence of the steps. To know details on each step, refer Manage Plans – By Team Members.

Review All Plans

Use the Review All Plans (LM_MSS_TEAM_OBJ_FL) page to view your team members and access their learning plans.

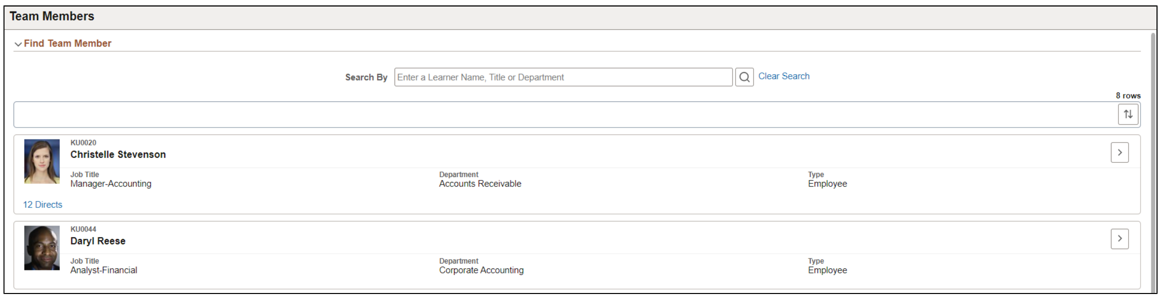
Navigation:

1. **Manager Self Service** > **Manage Team Plans** > **Review All Plans**
2. Search your team member from the **Team Members** page.
3. Select the  button for the corresponding team member row, to go to the **Manage Plans**.

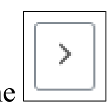
Team Members page

Use the Team Members page (LM_MSS_TEAM_OBJ_FL) to search for your team members.

This example illustrates the fields and controls on the Team Members page.



The Team Members page displays all your direct reports and provides an option to view their directs (if any) by clicking on the **<n> Directs** link below the profile photo of your direct report, where n is the number of team members. Click the link to drill down and have the page display a list of this person's direct reports. When managers drill down into the reporting hierarchy, breadcrumbs appear above the Team Members grid to show the management hierarchy from the user to the currently displayed group of employees. Select a person's name in the breadcrumbs to navigate back to that person's list of direct reports. When managers view their own direct reports, no breadcrumbs appear. The managers can only view their directs and direct reports of those directs (next level).

Expand the **Find Team Member** section to narrow the search for your team members. Click the  button for the corresponding team member row, to go to the **Manage Plans** page.

Manage Plans page

Use the Manage Plans page (LM_LRNR_PLANS_FL) to review the learning plans (current and completed) for your team members.

Managers can use the **Current Plans** page to view the ongoing learning plans for the selected team member, see who assigned the learning plan, and the plan status. You can also create learning plans. The **Completed Plans** tab displays the learning plans that are completed by the team member.

For more information, see Manage Plans and Learning Plan Details.

Related Links

Using the PeopleSoft Fluid User Interface for Manager Self-Service
Using the PeopleSoft Fluid Interface For Team Learning

Using the PeopleSoft Fluid User Interface for Instructor Self-Service

This topic discusses the tiles and pages associated with the Learning Instructor home page.

Pages Used to Perform Instructor Self-Service Using the PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Learning Instructor Home Page	LM_INSTR_WORKCENTER_FLU_GBL	Access instructor self-service transactions.
View Schedule Tile	LM_SCH_TILE_FLU_GBL (cref for the tile) LM_SCH_TILE_FLU (page for dynamic data)	Access the Schedule page where you can view and filter teaching schedules, and launch webcasts.
Schedule Page	LM_SCHEDULE_FL	View the Learning Instructor's schedule for the day, week and month.
Class Actions Tile	LM_CL_SESSION_FL (cref for the tile) LM_INST_TL_FL (page for dynamic data)	Access the My Classes page.
My Classes Page	LM_CL_SESS_FL	View class details on a desktop, and class and session details on a smartphone.
Instructor Preference Tile	LM_INSTR_PREFERENCE	Access the Instructor Preferences page where you can update your personal teaching preference information.

Learning Instructor Home Page

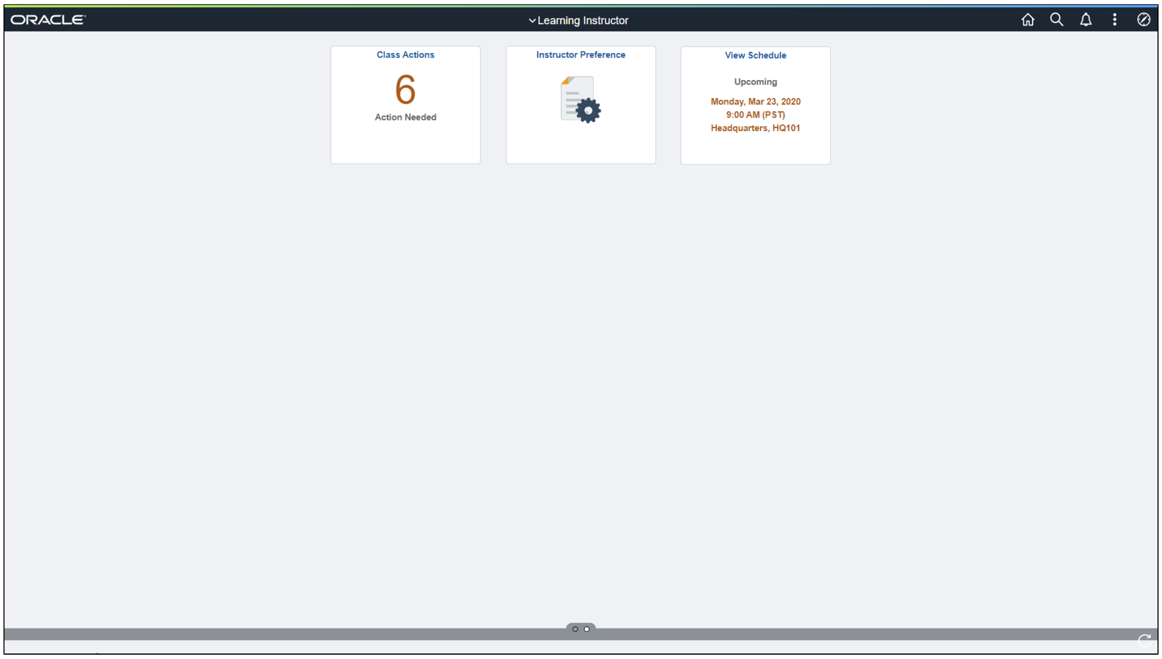
Use the Learning Instructor home page (LM_INSTR_WORKCENTER_FLU_GBL) to access instructor self-service transactions.

Navigation:

The fluid home appears when you first sign in. The default home page title appears at the top of the home page.

If the Learning Instructor home page is not your default home page, click the title of the default home page and select Learning Instructor from the list that appears.

This example illustrates the Learning Instructor home page.



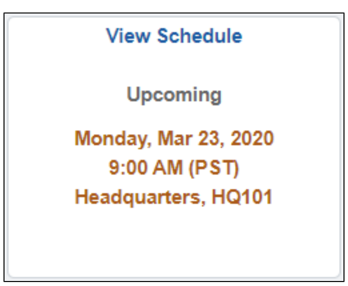
View Schedule Tile

Use the View Schedule tile (LM_SCH_TILE_FLU_GBL – cref for the tile, LM_SCH_TILE_FLU – page for dynamic data) to access the Schedule page where you can view and filter teaching schedules, and launch webcasts.

Navigation:

The View Schedule tile is delivered as part of the Learning Instructor fluid home page.

This example illustrates the View Schedule tile.



The **View Schedule** tile displays the next or upcoming class for the logged in instructor. The tile displays the date, time, class title and the location of the class.

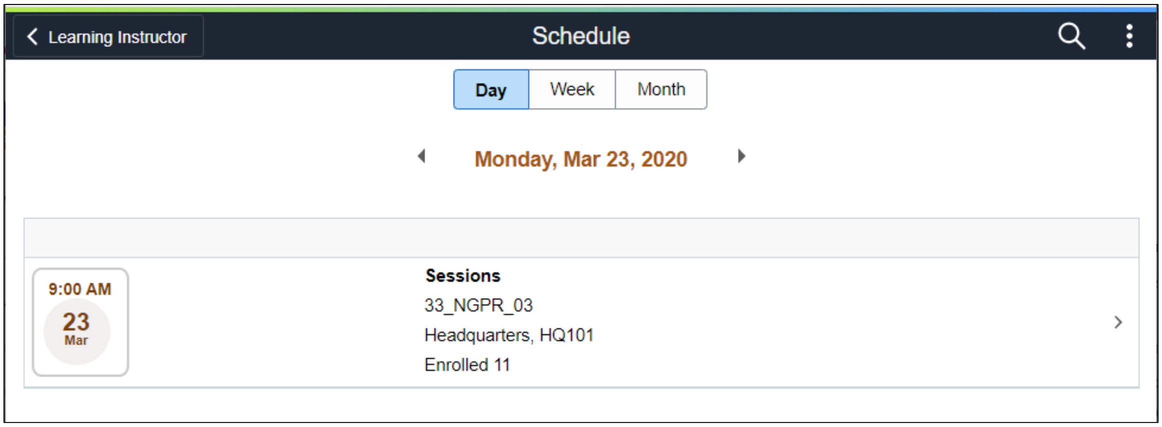
If there are no classes scheduled, the tile displays “No Classes Scheduled".

Click this tile to access the Schedule page.

Schedule Page

Use the Schedule page (LM_SCHEDULE_FL) to view the Learning instructor's schedule for the day, week and month.

This example illustrates the fields and controls on the Schedule Page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
>	Click the chevron (>) or a row to access the corresponding Class Detail page.

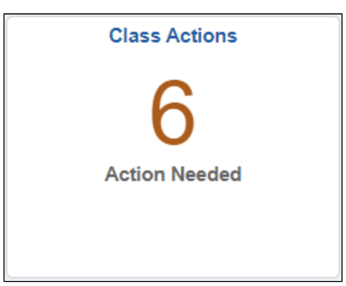
Class Actions Tile

Use the Classes Actions tile (LM_CL_SESSION_FL- cref for tile, LM_INST_TL_FL - page for dynamic data) to access the My Classes page.

Navigation:

The Class Actions tile is delivered as part of the Learning Instructor fluid home page.

This example illustrates the Class Actions tile.



The Class Actions tile displays the number of pending actions or actions needed from the logged in instructor.

Related Links

Managing Classes as a Learning Instructor Using the PeopleSoft Fluid User Interface

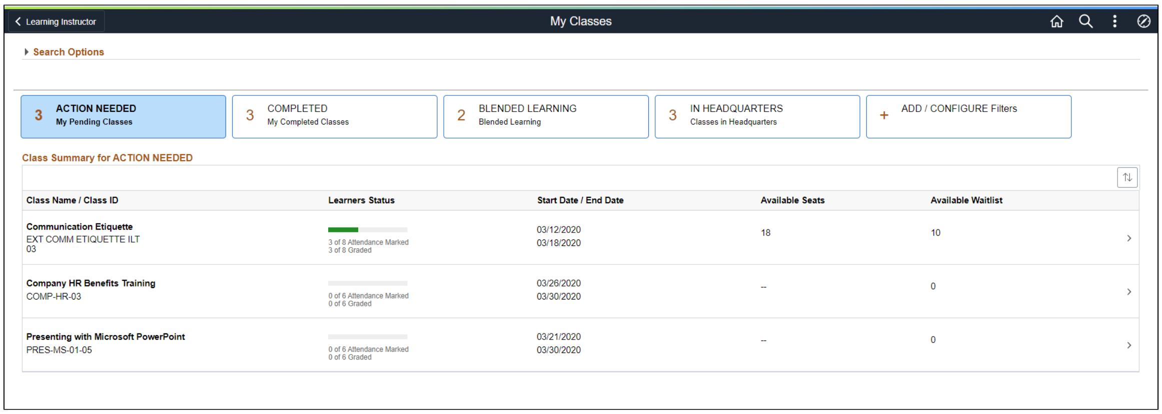
My Classes Page

Use the My Classes page (LM_CL_SESS_FL) to view class details on a desktop, and class and session details on a smartphone.

Navigation:

Click the Class Actions tile on the Learning Instructor home page.

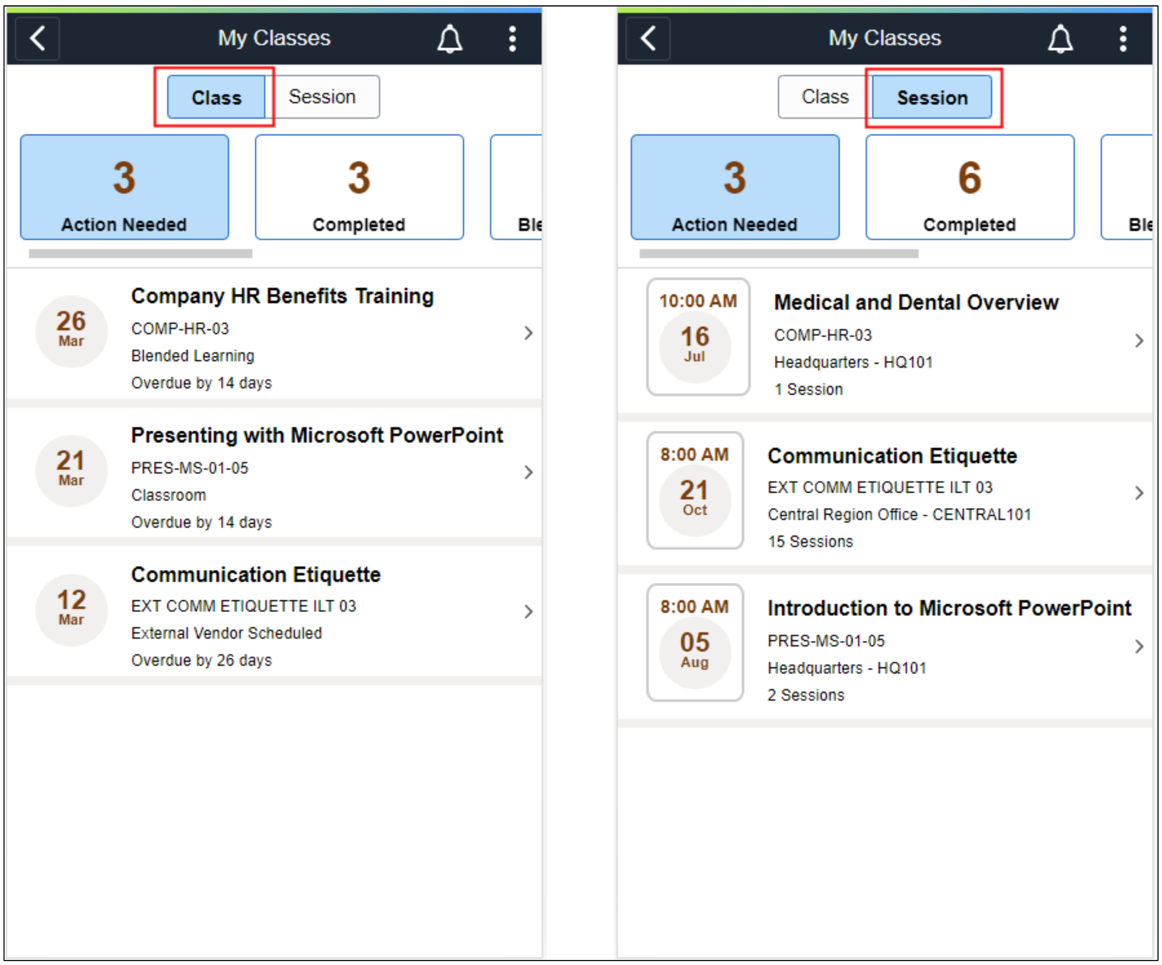
This example illustrates the My Classes page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Search for Classes	You can search for classes using parameters such as title, class code, location, date etc. Enter at least one parameter and click the **Search** button.
Filters	Use the filters to display the classes based on your set preferences, such as class status, location, learning type, language, etc. PeopleSoft delivers two pre-defined filters along with the My Classes page: **Pending** and **Completed**. Whenever the **My Classes** page is accessed, the page with the **Pending** filter is always displayed by default.
Add/Configure Filter	Click **Add/Configure Filter** to access the **Add Filter** page.
Class Name/ID	Displays the class name or the class ID.
Status	Displays the class completion status. This is a visual representation of the ratio of learners who completed the class (and for whom the grades and attendance are already marked) to the enrolled learners.
Start Date/End Date	Displays the start and dates for the classes.

Field or Control	***Description***
Instructor	Displays the name of the logged in instructor.
Enrolled/Waitlisted	Displays the names of learners, both enrolled and wait listed.
>	Click the chevron (>) or a class row to access the **Class Detail** page.

This example illustrates the fields and controls on the My Classes page as seen on a smartphone. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Class tab	The **Class** tab shows the list of classes assigned to you.
Session tab	The **Session** tab shows the list of sessions assigned to you.

Field or Control	***Description***
Filters	Use the filters to display the classes or sessions based on your set preferences, such as class status, location, learning type, language, etc. PeopleSoft delivers two pre-defined filters along with the My Classes page: **Pending** and **Completed**.
Add Filter	Click **Add Filter** to access the **Add Filter** page.
>	From the Class tab, click the chevron (>) or a class row to access the **Class Summary** page. From the Session tab, click the chevron (>) or a session row to access the **Component Details** page.

Related Links

Managing Classes as a Learning Instructor Using the PeopleSoft Fluid User Interface

Instructor Preference Tile

Use the Instructor Preference tile (LM_INSTR_PREFERENCE) to access the Instructor Preferences page where you can update your personal teaching preference information.

Navigation:

The Instructor Preference tile is delivered as part of the Learning Instructor fluid home page.

This example illustrates the Instructor Preference tile.

Click this tile to access the Instructor Preferences Page.

Managing Classes as a Learning Instructor Using the PeopleSoft Fluid User Interface

This topic discusses how Learning Instructors and Administrators use the PeopleSoft Fluid User Interface to manage classes. In the first part of this topic, we discuss and illustrate the fluid learning instructor pages as viewed on a smartphone. In the second part, we discuss and illustrate the fluid learning instructor pages as seen on desktop/tablet devices.

Note: The fluid pages covered in this topic are best optimized for viewing on smartphones and are specifically designed for the ease of use by the Learning Instructors.

Pages Used to Manage Classes as a Learning Instructor Using the PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Fluid Learning Instructor Pages as Seen on Smartphones		
My Classes Page	LM_CL_SESS_FL	View classes/sessions, based on the filter chosen, on a smartphone.
Setup Filters Page	LM_INST_FILTER_FL	Manage the filters or add a new filter.
Add Filter Page	LM_INST_FILTER_SCF	Add a new filter.
Class Summary Page	LM_INST_ACT_DTL_FL	Access the class details and perform class actions.
Mark Grade Page (Mark Grade page in the Class flow for all learners.)	LM_INST_ACT_FL	View the class roster, and mark grades and attendance for selected learners or even the whole class.
Class Roster Page	LM_INST_ACT_CR_FL	View the list of learners enrolled in a particular class.
Mark Grade Page (Mark Grade page in the Class flow for an individual learner.)	LM_LEARNER_DTL_FL	Mark grade and attendance for an individual learner enrolled in the class.
Component Details Page	LM_INST_LC_DTL_FL	View details about a learning component, as well as to complete the component actions, such as marking grades and attendance and viewing the class roster.
Component Roster Page	LM_INST_LC_VWALL	View details about a learning component, such as the component name, code and type, and the list of learners enrolled for that learning component.

Page Name	***Definition Name***	***Usage***
View Learner Page	LM_VIEW_LRNR_FL	View/edit the grades, attendance and score for the enrolled learners for the selected learning component.
Mark Grade Page (Mark Grade page in the Session flow.)	LM_LC_ROSTER_FL	Mark grade and attendance for an individual learner for the selected learning component.
Fluid Learning Instructor Pages as Seen on Desktop/Tablet Devices		
My Classes Page	LM_LFF_CLS_HOME_FL	View all classes based on the selected filter or the search results on a desktop/ tablet device.
Setup Filters Page	LM_LFF_FILTER_FL	View the names, orders and other details of the filters. You can also use this page to add new filters or reorder the existing filters.
Add Filter Page	LM_LFF_FILTER_SCF	Edit the filter details, and set up the search options for the filters.
Class Details Page	LM_INST_ACT_L_FL	Displays class details and learning components for a selected class from the **Class Summary** page. Also mark grades, attendance and scores, as well as process mass actions for the selected class.

My Classes Page

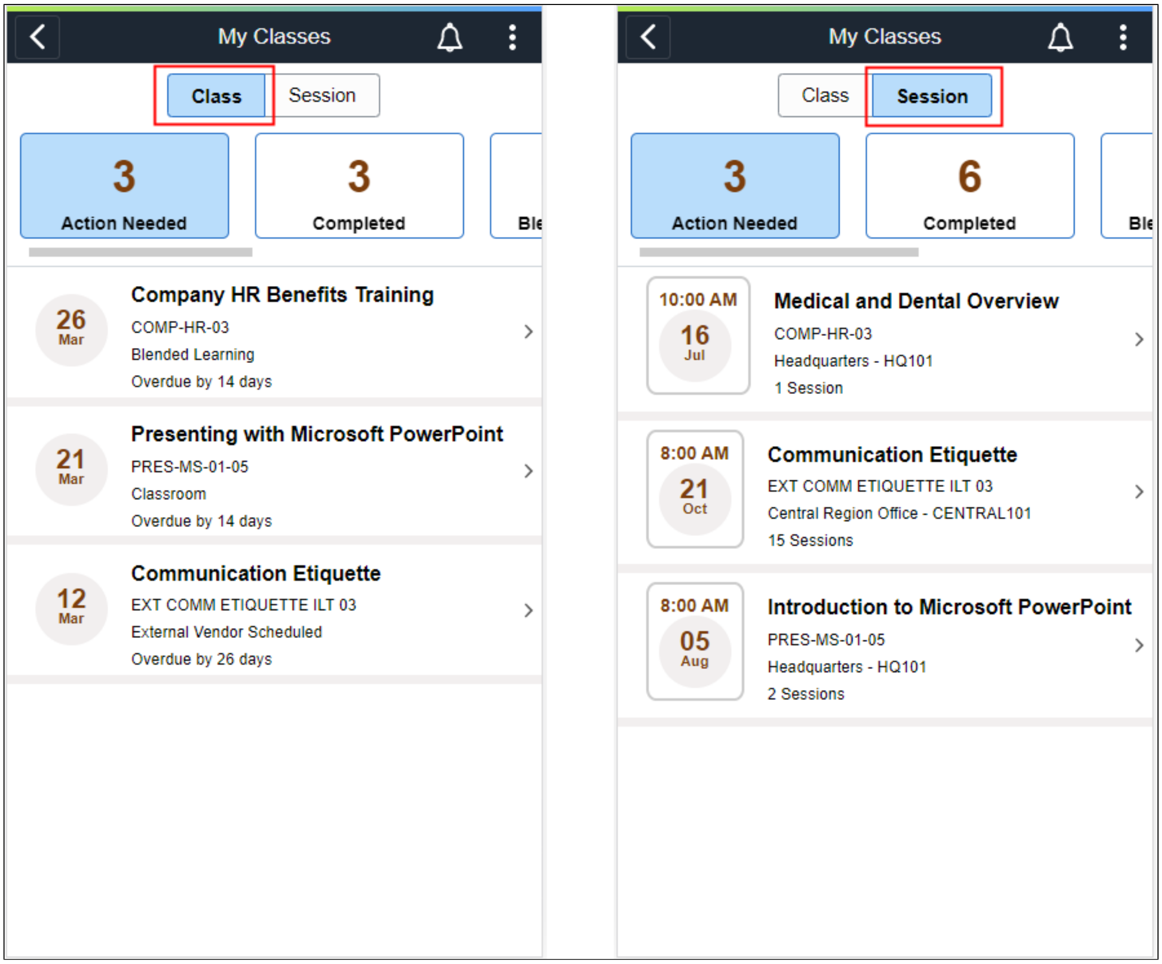
Use the My Classes page (LM_CL_SESS_FL) to view classes or sessions, based on the filter chosen, on a smartphone.

Note: My Classes page lists only the classes for which the logged-in learning instructor or administrator is the primary instructor or instructor of a component of the class.

Navigation:

Click the Class Actions tile on the Learning Instructor home page to access the My Classes page.

This example illustrates the fields and controls on the My Classes page as seen on a smartphone. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Class tab	The **Class** tab displays classes based on the filter selected. For example, when the Action Needed filter is selected, this tab displays all the classes that are pending for the logged in instructor.
Session tab	As the filters are applied at the class level, the **Session** tab displays only the instructor-led sessions for those classes.

Field or Control	***Description***
Filters	Use the filters to display the classes or sessions based on your preferences, such as location, class statuses, like completed or pending, learning type, language, etc. By default, the **My Classes** page opens with the **Action Needed** filter on, irrespective of the filter order. **Note:** On smartphones, the filter option is available only for the instructors. Administrators are able to view filters only if they are instructor for at least one class.
Add Filter	Click **Add Filter** to access the **Setup Filters** page.
>	From the Class tab, click the **>** or a class row to access the **Class Summary** page. From the Session tab, click the **>** or a session row to access the **Session Details** page.

More About Filters

PeopleSoft delivers two default filters: **Action Needed** and **Completed**.

- **Action Needed**: This filter returns classes for which action is pending for the logged in user, who is either a primary instructor or a non-primary instructor associated with a component of the class. Pending action for a class indicates that the class has enrolled learners but their attendances and grades are not marked.

  Note: A class is deemed complete only when the instructor has completed marking grades and attendance for all the learners.

  For sessions, the **Action Needed** filter returns all instructor-led sessions that are not completed for a class.

- **Completed**: This filter returns classes for which the instructor has marked grade and attendance for all the learners.

  Note: The number of months to be considered while fetching classes for the **Completed** filter is set in the **Fluid Filter Options** section in the Instructor Preferences Page. By default, the value is one month.

Note: The filter option lists only the classes for which the logged-in learning instructor or administrator is the primary instructor or instructor of a component of the class.

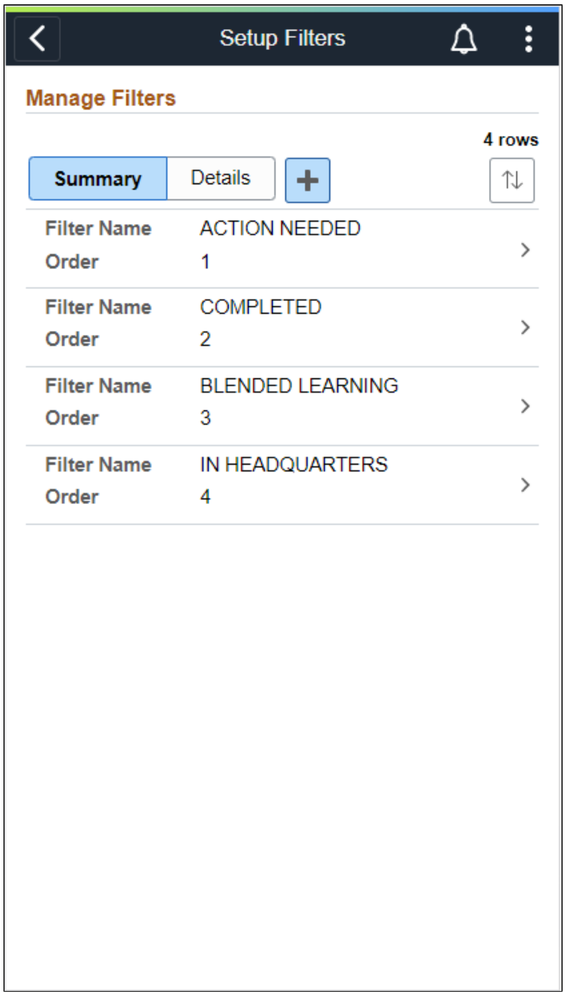
Setup Filters Page

Use the Setup Filters page (LM_INST_FILTER_FL) to manage the filters or add a new filter.

Navigation:

Click Add/Configure Filter in the My Classes page to access the Setup Filters page.

This example illustrates the fields and controls on the Setup Filters page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Summary	Click the **Summary** tab to view summary information (that is, the filter name and order) about the filters.
Details	Click the **Details** tab to view detailed information (that is, the filter name, order and type) about the filters.
+	Click the + button to access the **Add Filter** page, to add a new filter.
>	Click > to access the **Edit Filter** page, to edit the order, name or description of the filters.
Sort button	Click the **Sort** button to sort filters based on filter name or order.

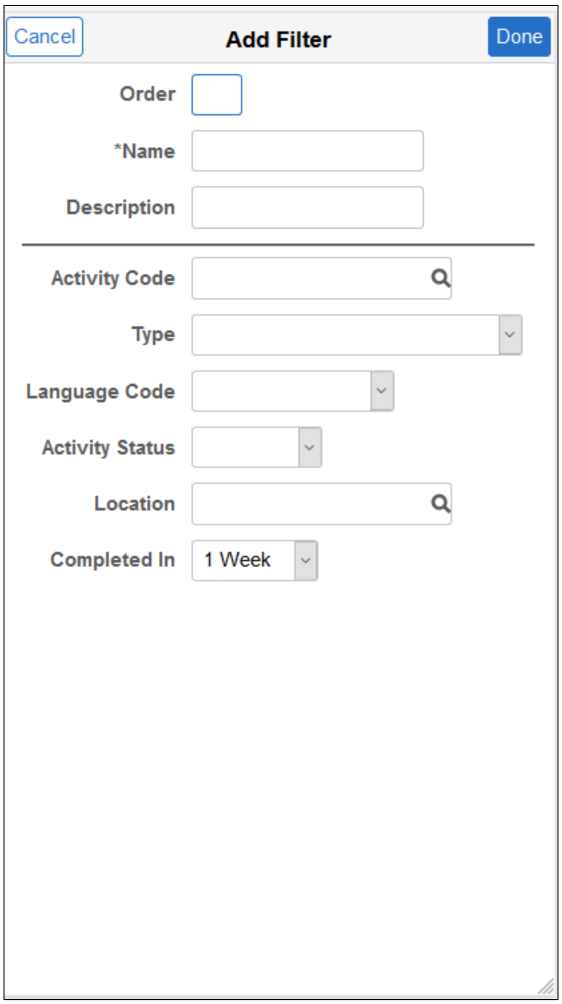
Add Filter Page

Use the Add Filter page (LM_INST_FILTER_SCF) to add a new filter.

Navigation:

Click the + button in the Setup Filters page to access the Add Filter page.

This example illustrates the fields and controls on the Add Filter Page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Order	Enter the order in which you want the filter displayed in the **My Classes** page.
Name	Enter a name for the filter.
Description	Enter a description for the filter.

Use the following parameters to set up personalized filters for searching classes.

Field or Control	***Description***
Activity Code	Select any class code.
Type	Select a class type.
Language Code	Select a language code.
Activity Status	Select an activity/class status. The available values are **Active**, **Closed**, **Concluded**, **Inactive** and **Action Needed**.
Location	Select a class location.
Completed In	Select a class duration. You can select to filter classes from last **1 Week**, **1 Month**, **3 Months**, **6 Months** or **12 Months**. By default, the option is **1 Week**.

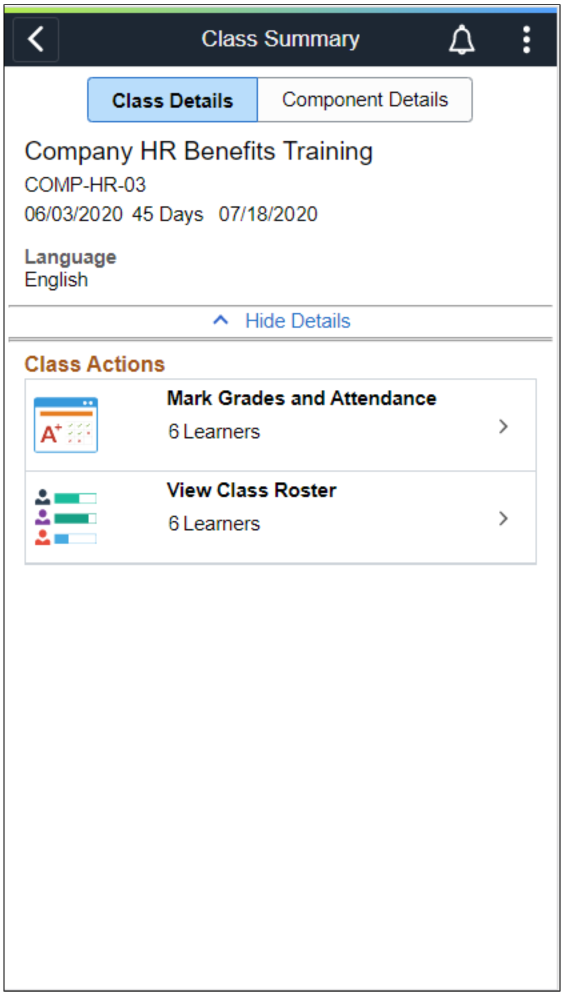
Class Summary Page

Use the Class Summary page (LM_INST_ACT_DTL_FL) to access the class details and perform class actions.

Navigation:

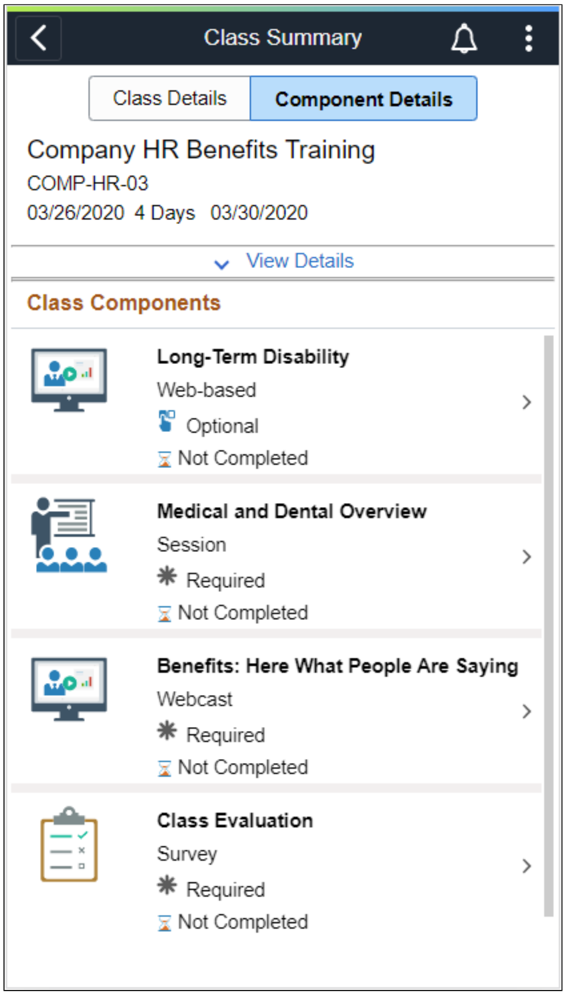
Click any class row in the My Classes page.

This example illustrates the fields and controls on the Class Summary page — Class Details tab.



Field or Control	***Description***
Title section	The title section displays the class name, class code, and if present, the begin and end dates, and the duration of the class.
View Details/Hide Details link	Click the link to view/hide details of the class.
Class Actions rows	Click a row to access the corresponding page for that class action, such as marking grades and attendance or viewing class roster. The **Mark Grades and Attendance** action row shows the number of learners for whom the instructor has pending actions. This action row will be hidden for completed classes. To edit grade, attendance or score for a completed class, you can use the **View Class Roster** action. The **View Class Roster** action row displays the number of enrolled learners for that class.

This example illustrates the fields and controls on the Class Summary page – Component Details tab.



Field or Control	*Description*
View Details/Hide Details link	Click the link to view/hide details of the class components.
Class Components rows	The **Class Components** row displays the learning component's name, type, status and whether it is a required component or not. Click a row to access the **Component Details** page for that class component.

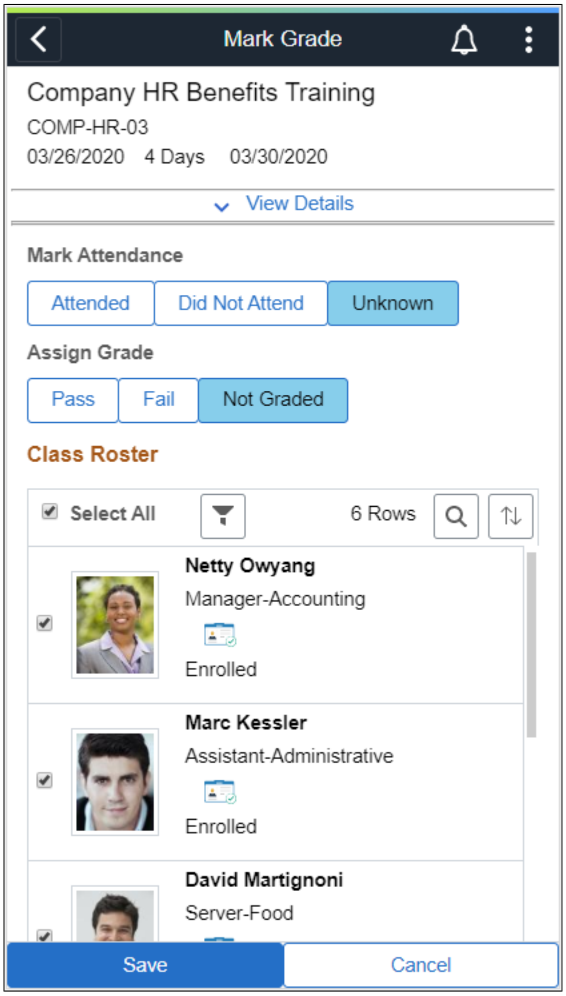
Mark Grade Page

Use the Mark Grade page (LM_INST_ACT_FL) to view the class roster, and mark grades and attendance for selected learners or even the whole class.

Navigation:

From the Class Summary–Class Details page, click the class action row for Mark Grades and Attendance.

This example illustrates the fields and controls on the Class–Mark Grade Page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Title section	The title section displays the class name, code and duration, and if present the start and end dates of the class.
View Details/ Hide Details link	Click the link to view/hide details of the **Mark Grade** page.
Mark Attendance	Select from the available options of: **Attended**, **Did Not Attend** or **Unknown**. The default value is **Unknown** .
Assign Grade	Select from the available options of: **Pass**, **Fail** or **Not Graded**. The default value is **Not Graded**.

Field or Control	***Description***
Select check box	Select the check box next to a learner or use the **Select All** check box at the top to mark grades and attendance for learner/ learners.
Filter	Use the filter button to filter learners based on learner details, enrollment status or confirmation dates.
Search	Use the **Search** option to search for a specific learner.
Sort	Use the **Sort** option to sort learners based on parameters such as, name and job title.

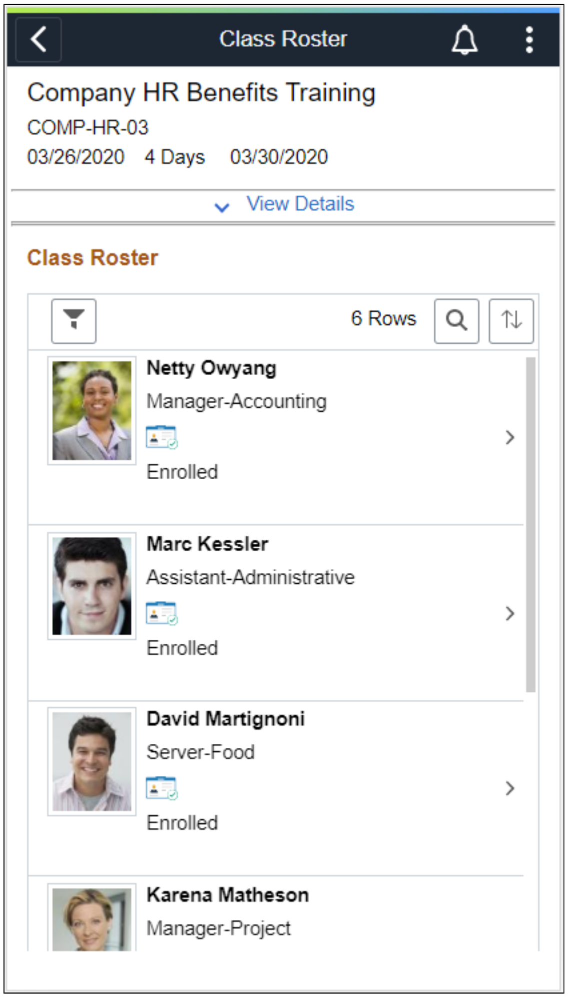
Class Roster Page

Use the Class Roster page (LM_INST_ACT_CR_FL) to view the list of learners enrolled in a particular class.

Navigation:

From the Class Summary — Class Details page, click the class action row for View Class Roster.

This example illustrates the fields and controls on the Class Roster Page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Title section	The title section displays the class name, code, duration, and if present, the start and end dates of the class.
View Details/Hide Details link	Click the link to view/hide details of the class roster.
> chevron	Click either a row or chevron to go to the **Mark Grade** page for that particular learner.

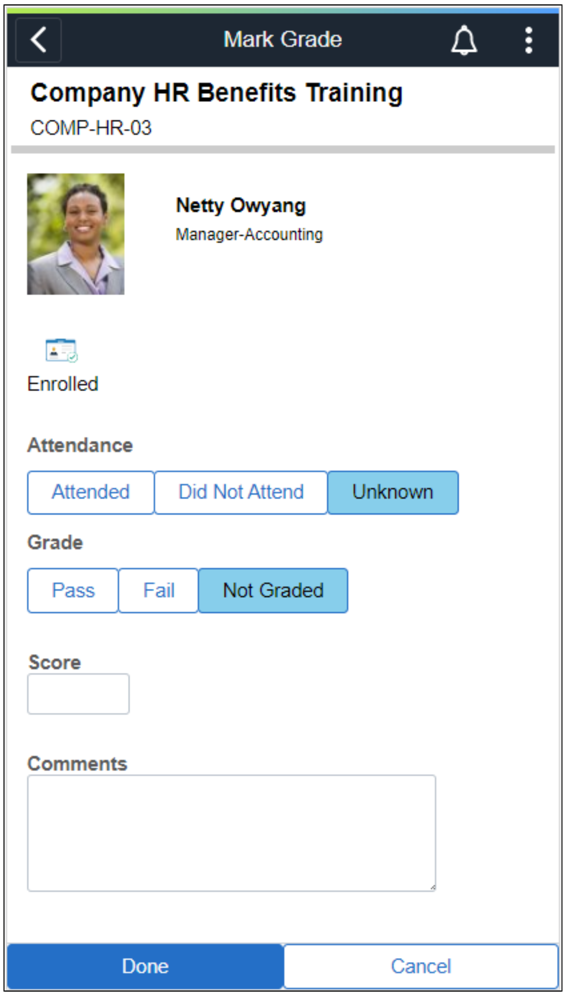
Mark Grade Page

Use the Mark Grade page (LM_LEARNER_DTL_FL) to mark grade and attendance for an individual learner enrolled in the class.

Navigation:

From the Class Summary–Class Details page, click the class action row for View Class Roster and then an individual learner.

This example illustrates the fields and controls on the Mark Grade Page.



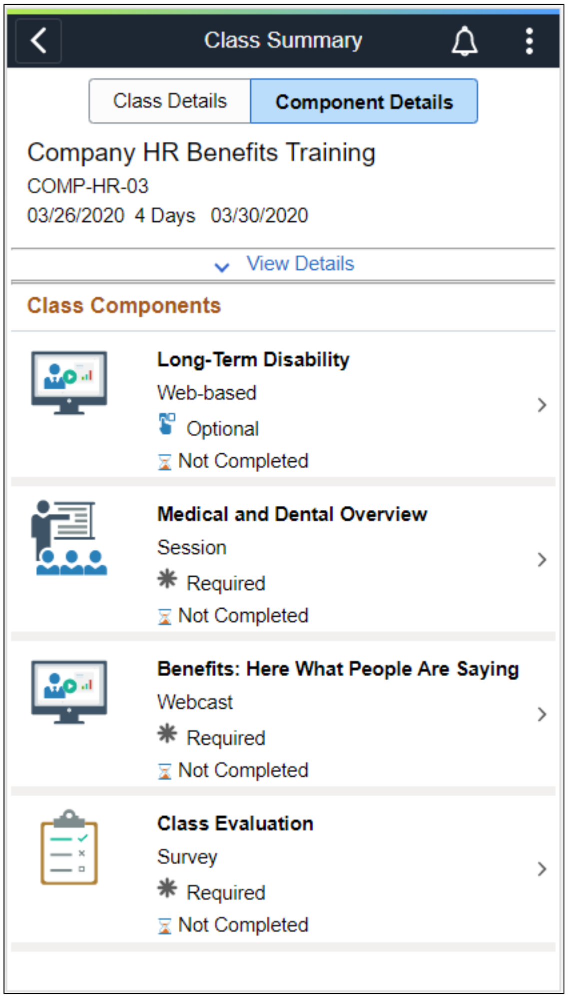
Component Details Page

Use the Component Details page (LM_INST_LC_DTL_FL) to view details about a learning component, as well as to complete the component actions, such as marking grades and attendance and viewing the class roster.

Navigation:

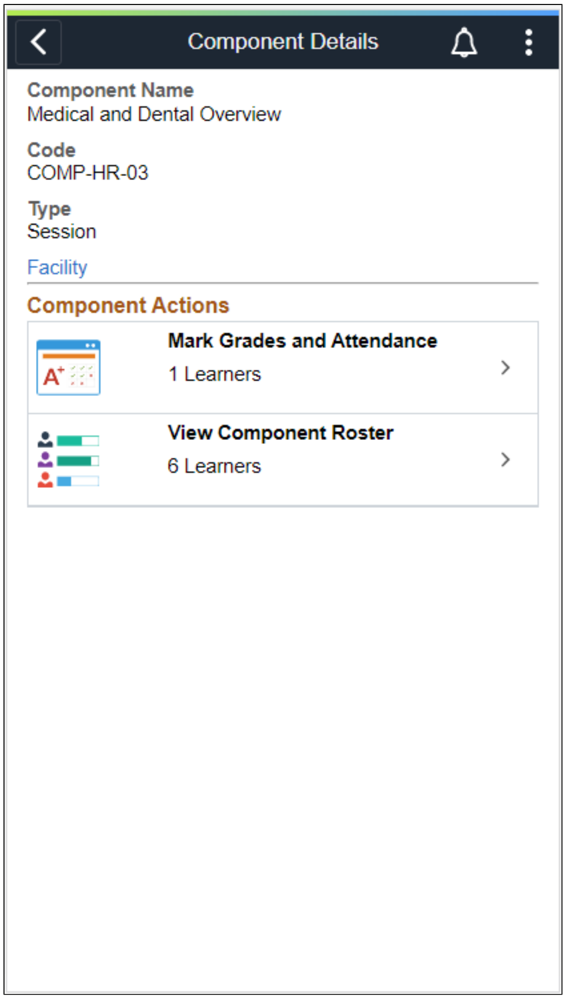
- From the My Classes page, Class tab, click a row to access the Class Summary page. In the Class Summary, click the Component Details tab to access the Component Details page.
- From the My Classes page, Session tab, click a row to access the Component Details page.

This example illustrates the fields and controls on the Component Details Page as seen when opened from the Class tab.



Field or Control	***Description***
Title section	The title section displays the component name, code and type.
View Details/Hide Details link	Click the link to view/hide details of the class.
Component Action rows	Click a row to access the corresponding page for that Component action, such as marking grades, attendance and scores, or viewing Component roster. The **Mark Grades and Attendance** action row shows the number of learners for whom the instructor has pending actions. This action row will be hidden for completed components. To edit grade, attendance or score for a completed component, you can use the **View Component Roster** action. The **View Component Roster** action row displays the number of enrolled learners for that component.

This example illustrates the fields and controls on the Component Details Page when opened from the Session tab.



Field or Control	***Description***
Title section	The title section displays the component name, code and type.
View Details/Hide Details link	Click the link to view/hide details of the class.
Facility link	Click the link to access the Facility Page.

Field or Control	***Description***
Component Action rows	Click a row to access the corresponding page for that Component action, such as marking grades, attendance and scores, or viewing Component roster. The **Mark Grades and Attendance** action row shows the number of learners for whom the instructor has pending actions. This action row will be hidden for completed components. To edit grade, attendance or score for a completed component, you can use the **View Component Roster** action. The **View Component Roster** action row displays the number of enrolled learners for that component.

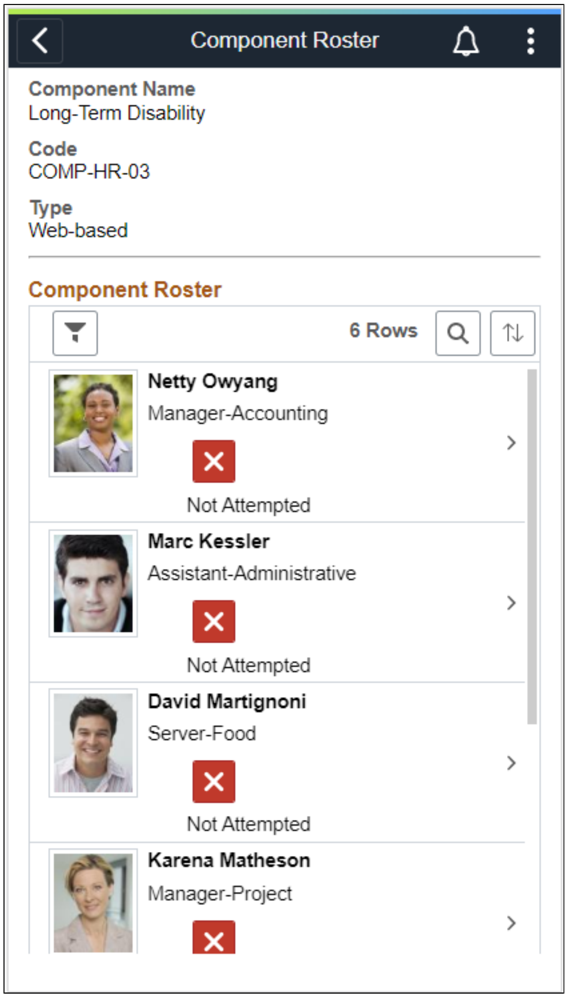
Component Roster Page

Use the Component Roster page (LM_INST_LC_VWALL) to view details about a learning component, such as the component name, code and type, and the list of learners enrolled for that learning component.

Navigation:

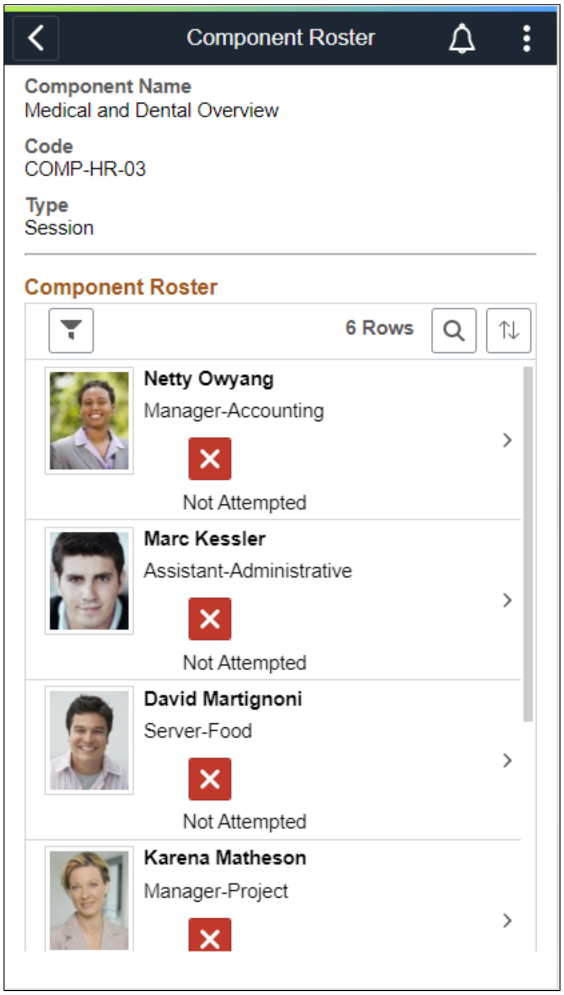
- From the My Classes page, Class tab, click a row to access the Class Summary page. In the Class Summary, click the Component Details tab to access the Component Details page. In the Component Details page, click the View Component Roster to access the Component Roster page.
- From the My Classes page, Session tab, click a row to access the Component Details page. In the Component Details page, click the View Component Roster to access the Component Roster page.

This example illustrates the fields and controls on the Component Roster Page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Title section	The title section displays the Component name, code and type of the component.
View Details/Hide Details link	Click the link to view/hide details of the component roster.
> chevron	Click either a row or chevron to go to the **Mark Grade** page for that particular learner.

This example illustrates the fields and controls on the Session–Component Roster Page.



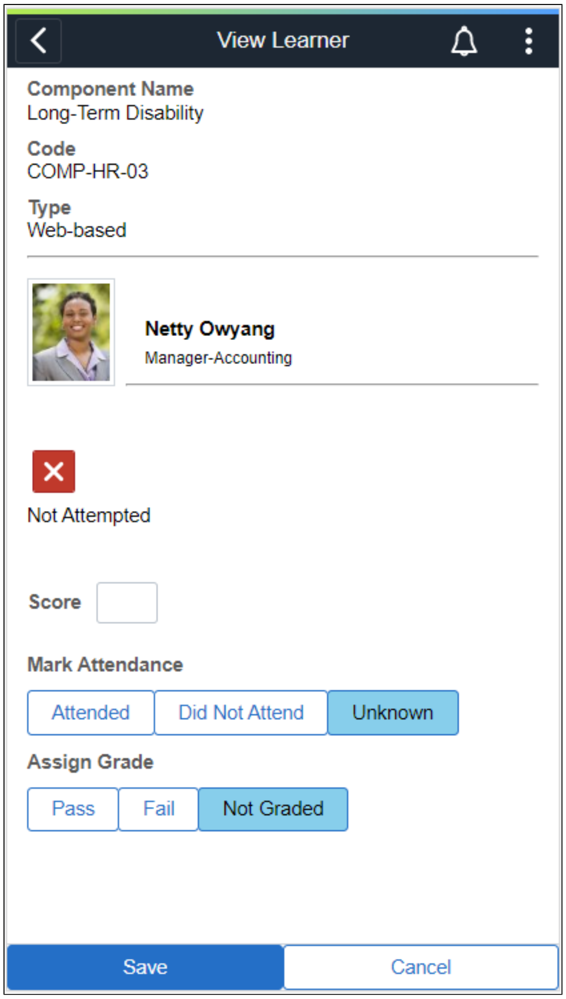
View Learner Page

Use the View Learner page (LM_VIEW_LRNR_FL) to view/edit the grades, attendance and score for the enrolled learners for the selected learning component.

Navigation:

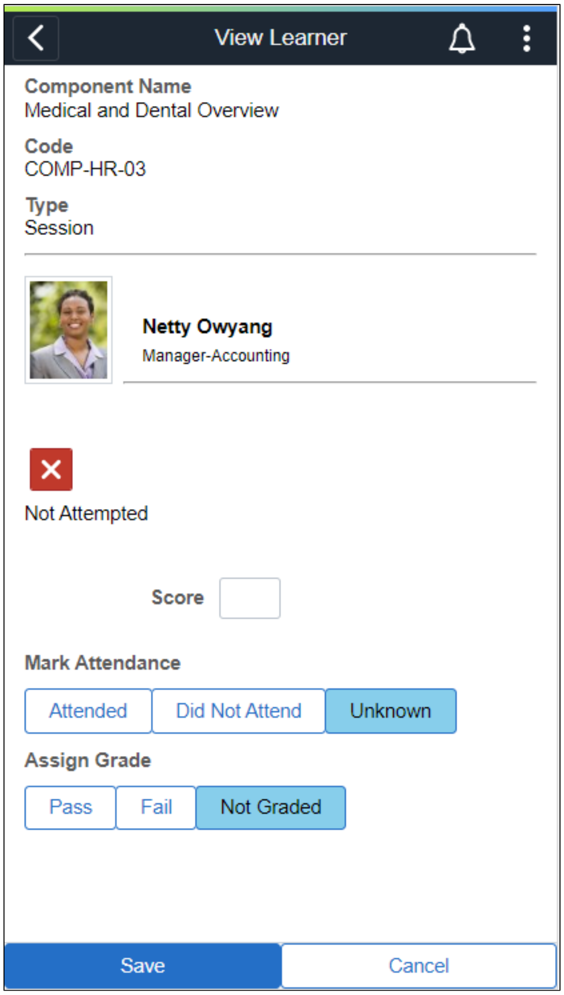
- From the My Classes page, Class tab, click a row to access the Class Summary page. Then, click the Component Details tab, click a class component row, to access the Component Details page. In the Component Details page, the View Component Roster to access the Component Roster page and then, click a learner row to access the View Learner page for that particular learner.
- From the My Classes page, Session tab, click a row to access the Component Details page. Then click the View Component Roster to access the Component Roster page. In the Component Roster page, click a learner row to access the View Learner page for that particular learner.

This example illustrates the fields and controls on the View Learner page from the Class flow. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Title section	The title section displays the Component name, code and type. It also displays a photo of the learner with role details.
Score	The instructor can enter the score for the learner in this field. **Note:** The grades, attendance and score of the learner is shown or hidden based on the learning component type. For example, an assignment will not have the option for marking grades, attendance or score.
Mark Attendance	The instructor can mark attendance for the learner. By default, the option is **Unknown**.
Assign Grade	The instructor can assign a grade for the learner. By default, the option is **Not Graded**.

This example illustrates the fields and controls on the View Learner Page from the Session flow. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Title section	The title section displays the Component name, code and type. It also displays a photo of the learner with role details.
Score	The instructor can enter the score for the learner in this field. **Note:** The grades, attendance and score of the learner is shown or hidden based on the learning component type. For example, an assignment will not have the option for marking grades, attendance or score.
Mark Attendance	The instructor can mark attendance for the learner. By default, the option selected is **Unknown**.
Assign Grade	The instructor can assign a grade for the learner. By default, the option selected is **Not Graded**.

Mark Grade Page

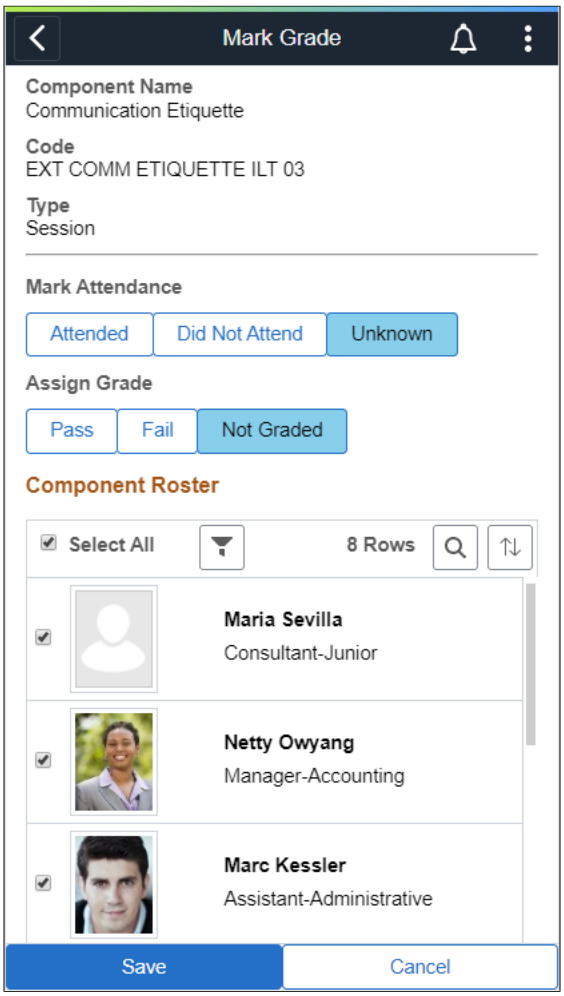
Use the Mark Grade page (LM_LC_ROSTER_FL) to mark grade and attendance for an individual learner for the selected learning component.

Note: The grades and attendance marked at the session level are automatically pushed to the class level.

Navigation:

From the My Classes page, Session tab, click a row to access the Component Details page. Then, click the Mark Grades and Attendance row to access the Mark Grade page for learners enrolled in that component.

This example illustrates the fields and controls on the Mark Grade Page.



Field or Control	***Description***
Title section	The title section displays the component name, code and type.
Mark Attendance	Select from the available options of: **Attended**, **Did Not Attend** or **Unknown**. By default, the value is **Unknown** .

Field or Control	***Description***
Assign Grade	Select from the available options of: **Pass**, **Fail** or **Not Graded**. By default, the value is **Not Graded** .
Select check box	Select the check box next to a learner or use the **Select All** check box at the top to mark grades, score and attendance for learner/learners.
Filter	Use the filter button to filter learners based on learner details, enrollment status or confirmation dates.
Search	Use the **Search** option to search for a specific learner.
Sort	Use the **Sort** option to sort learners based on parameters such as, name and job title.

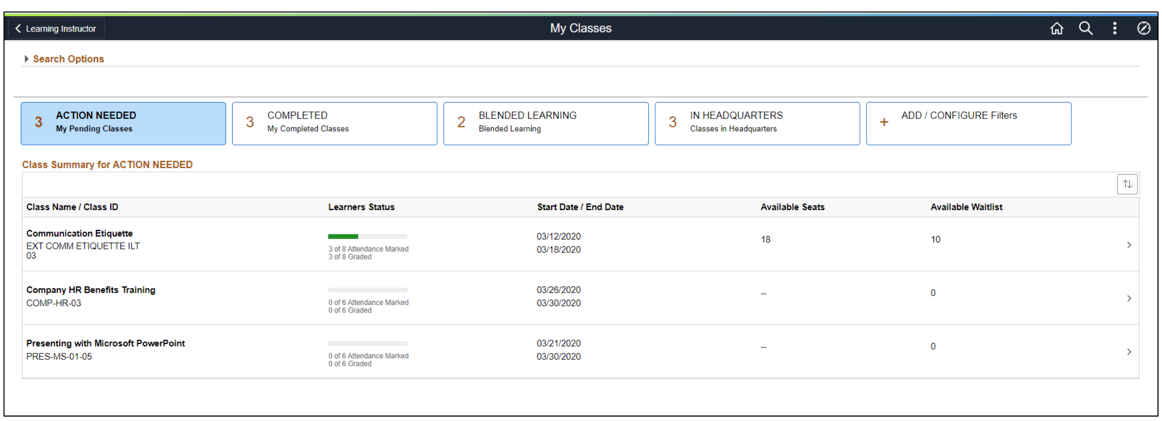
My Classes Page

Use the My Classes page (LM_LFF_CLS_HOME_FL) to view class summary information on a desktop.

Navigation:

Click the My Classes tile on the Learning Instructor home page to access the My Classes page.

This example illustrates the My Classes page.



Field or Control	***Description***
Search Options	Use the search options to perform searches for classes using various parameters such as, title, class code, type instructor, etc. Advanced search options are enabled based on the role of the user; i.e. Administrators or Administrators who also have the Instructor role. For Instructors, only keyword search is available.
Filters	Use the filters to display the classes or sessions based on your preferences, such as location, class statuses, like completed or pending, learning type, language, etc. By default, the **My Classes** page opens with the **Action Needed** filter on, irrespective of the filter order. **Note:** On desktops and tablets, the filter option is available for both instructors and Administrators.
Add Filter	Click **Add Filter** to access the **Setup Filters** page.
Sort button	Click the Sort button to sort classes on various parameters such as Class name, Class ID, instructor name, and start/end date of classes. You can also save your last sort preference.
>	Click the **>** or a class row to access the **Class Detail** page.

More About Filters

PeopleSoft delivers two default filters: **Action Needed** and **Completed**.

- **Action Needed**: This filter returns classes for which action is pending for the logged in user, who is either a primary instructor or a non-primary instructor associated with a component of the class. Pending action for a class indicates that the class has enrolled learners but their attendances and grades are not marked.

  Note: A class is deemed complete only when the instructor has completed marking grades and attendance for all the learners.

  For sessions, the **Action Needed** filter returns all instructor-led sessions that are not completed for a class.

- **Completed**: This filter returns classes for which the instructor has marked grade and attendance for all the learners.

  Note: The number of months to be considered while fetching classes for the Completed filter is set in the **Fluid Filter Options** section in the Instructor Preferences Page. By default, the value selected is one month.

Note: On desktops and tablets, the filter option is available for both Instructors and Administrators.

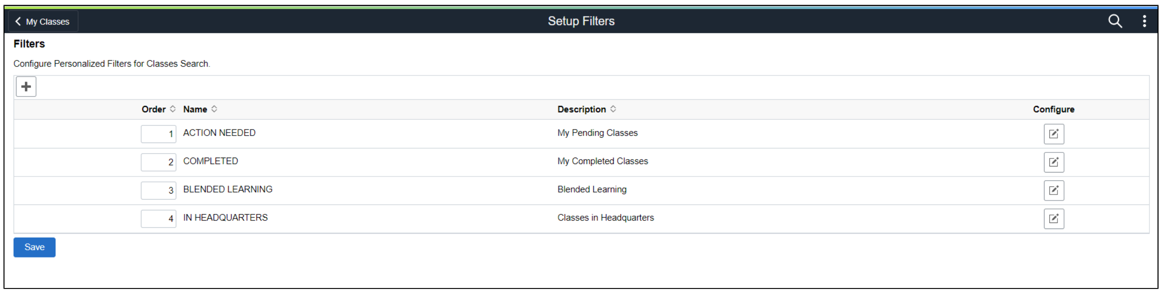
Setup Filters Page

Use the Setup Filters page (LM_INST_FILTER_FL) to view the names, orders and other details of the filters. You can also use this page to add new filters or reorder the existing filters.

Navigation:

Click**Add/Configure Filters** at the top of the My Classes page.

This example illustrates the fields and controls on the Setup Filters page.



Field or Control	***Description***
Summary tab	Displays the filter names and order.
Details tab	Displays the filter names, order and other details, such as location, type, language etc.
+	Click this button to add a new filter.

Add Filter Page

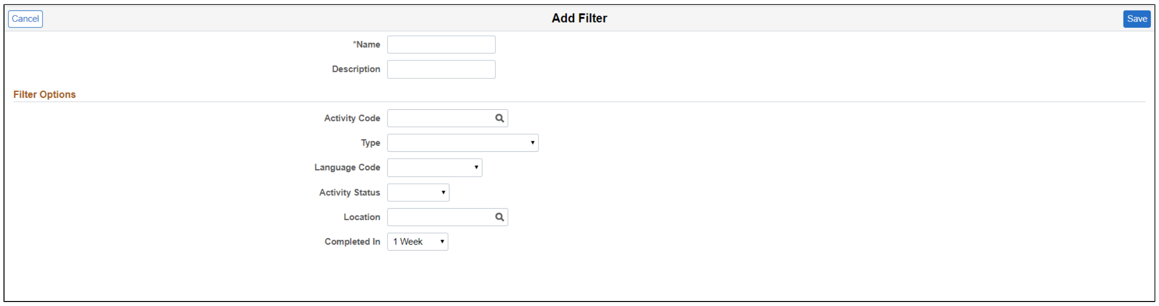
Use the Add Filter page (LM_INST_FILTER_SCF) to edit the filter details, and set up the search options for the filters.

Note: The PeopleSoft delivered filters (**Action Needed** and **Completed**) can only be reordered and not modified.

Navigation:

Click any filter row on the Setup Filters page.

This example illustrates the fields and controls on the Add Filter page.



Field or Control	***Description***
Name	Enter a name for the filter.
Description	Enter a description for the filter.

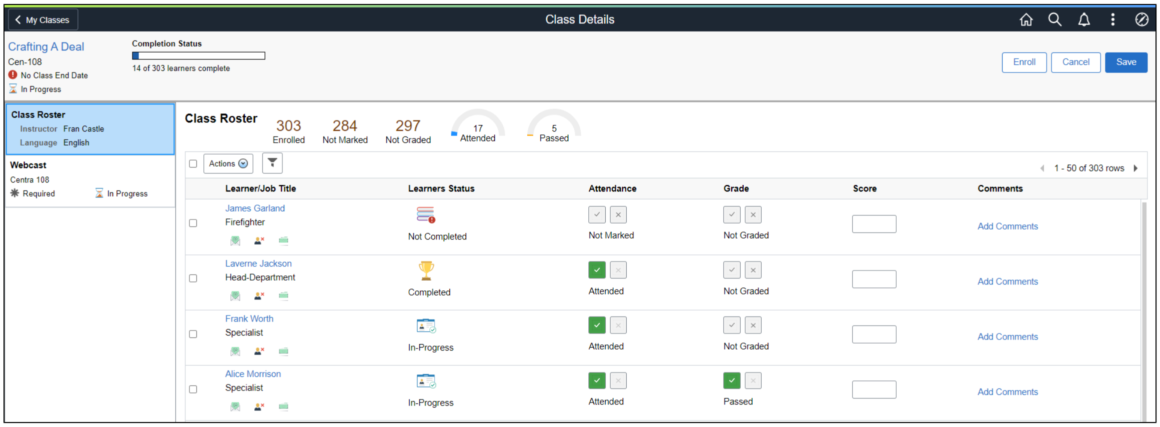
Use the following parameters to set up personalized filters for searching classes.

Field or Control	***Description***
Activity Code	Select any class code.
Type	Select a class type.
Language Code	Select a language code.
Activity Status	Select an activity/class status. The available values are **Active**, **Closed**, **Concluded**, **Inactive** and **Pending**.
Location	Select a class location.
Completed In	Select a class duration. You can select to filter classes from last **1 Week, 1 Month, 3 Months, 6 Months** or **12 Months**. By default, the option is **1 Week**.

Class Details Page

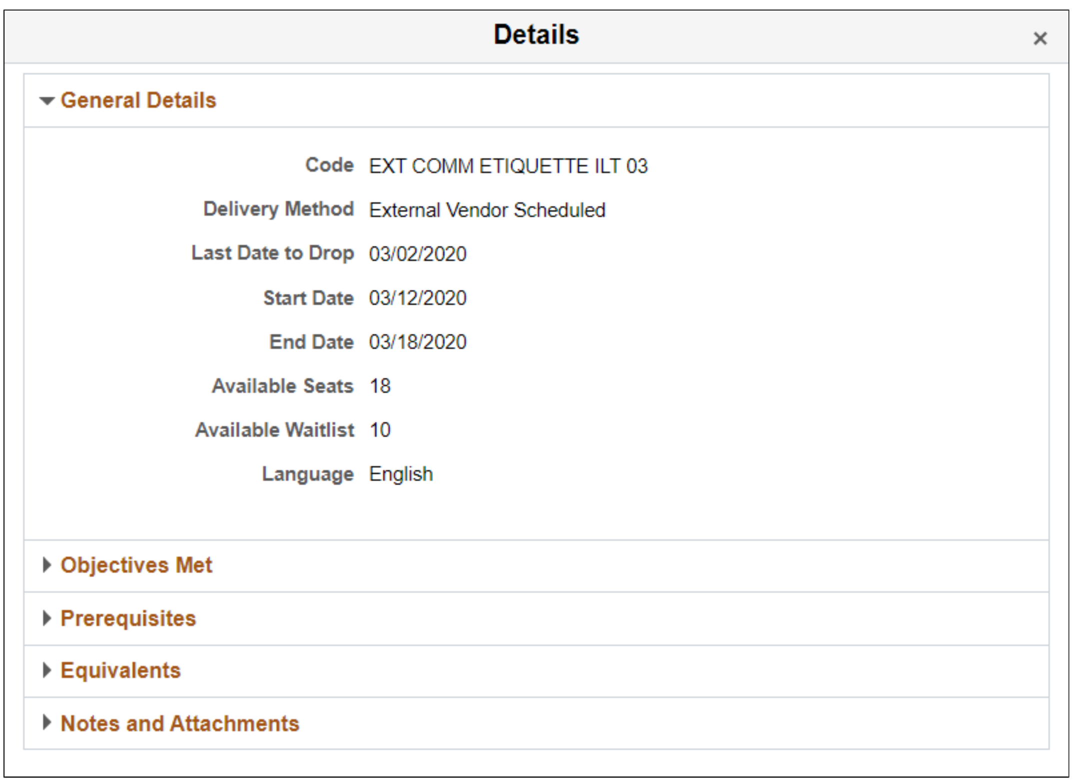
Use the Class Details page (LM_INST_ACT_L_FL) to view class details for the selected class.

This example illustrates the fields and controls on the Class Details page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
<Class Name> link, class code and status	Click the class name link to view the **Details** pop-up window with **General Details**, **Objectives Met** and **Equivalents** etc. The class code and status are displayed right below the class name link.

This example illustrates the fields and controls on the Details popup window.



Class Details–Left Panel

Note: On a Tablet device in Portrait mode, by default, the left panel appears collapsed. You can click the **Expand** button to view the left panel.

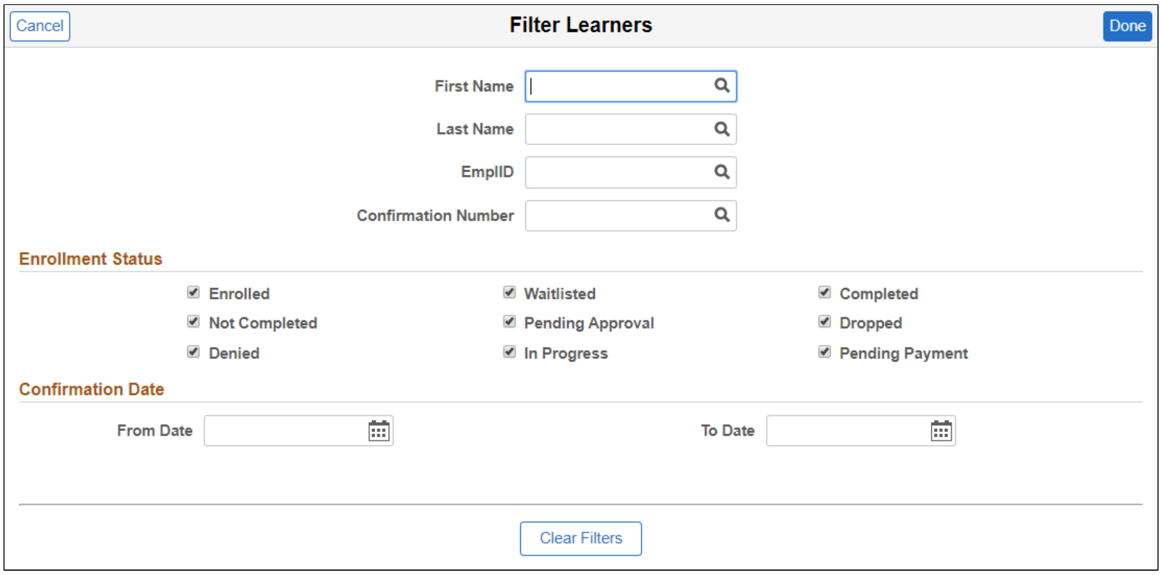
Field or Control	***Description***
Class Roster	When you open the **Class Details** page, by default, the **Class Roster** is selected and its details are shown in the right pane. The **Class Roster** row displays the primary instructor's name and the language for the class.
<Learning Component>	The various Learning Components that are part of the class are listed in the left panel below the Class Roster. You can select one and its details appear in the right pane. The Learning Component rows display the type, name and status along with if it is required or optional.

Class Details– Class Roster open in the Right Pane

Field or Control	***Description***
Enroll	Click the **Enroll** button to search for and add new learners to the class.
Print Roster	Click the **Print Roster** button to print the class roster in a PDF format. The **Print Roster** button is displayed only when a class has at least one learning component of the type, session.
Cancel	Click **Cancel** to return to the My Classes page.
Save	Click **Save** to save all the changes made to the **Class Detail** page.
Learner Status bar	This bar indicates the status of the learners for the selected class, i.e. how many learners have been marked grades and attendance.

Field or Control	***Description***
Class Roster Stats	These are numbers and gauges displayed at the top of the Class Roster. The stats include: • **Enrolled**: The total number of learners enrolled in the class. • **Not Marked** and **Not Graded**: The number of learners for whom attendance and grades are not marked. • **Attended**: This gauge displays the ratio of learners who attended the class against the total number enrolled. • **Passed**: This gauge displays the ratio of total learners who passed to total enrolled.
Actions menu	From the **Actions** menu, you can access a number of tasks, such as marking class completion, grades and attendance. Other Actions include dropping learners or moving them to a new class, sending notifications, and printing completion certificates.
Filter Learners button	Click the filter icon to find learners based on parameters like the learner details, enrollment status and confirmation date.
1 - 50 of 303 rows	Displays the range of rows in the Class Details page along with the total number of rows. Click the left or right arrows to navigate to the previous or next set of rows. The number of rows displayed per page in the Class Details page can be configured using the Internal Learners - Learner Attributes Page. **Note:** The total number of rows in the Class Details page may vary from the count displayed in the Class Roster Stats visualization. For example, the total row count includes learners in both Enrolled and Waitlisted statuses. Whereas, the Class Roster Stats display only the count of Enrolled learners.

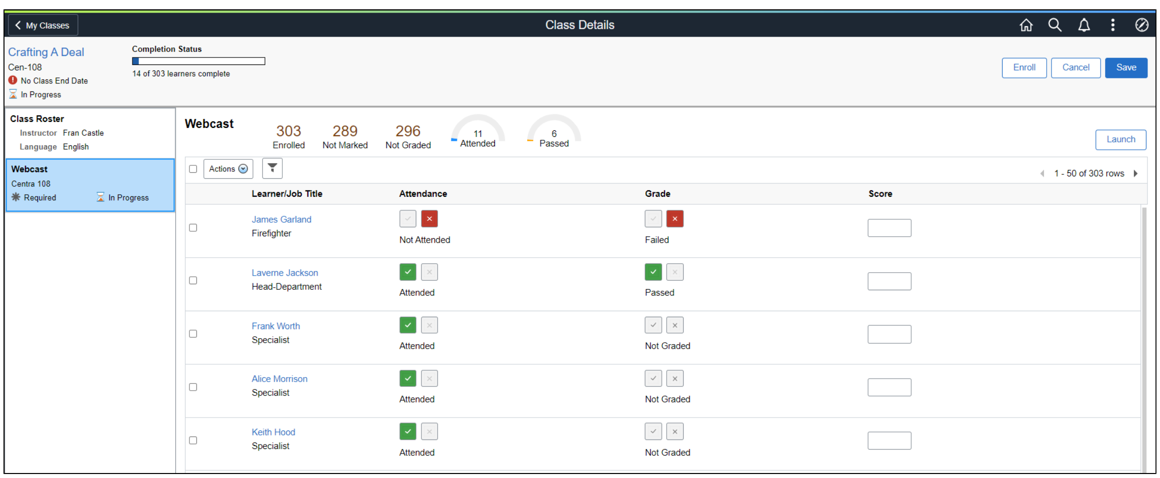
This example illustrates the fields and controls on the Filter Learners page.



Field or Control	***Description***
Find button	Click the lookup button to open a **Find** pop-up window to search for learners.
Sort button	Use the **Sort** button to sort the learners displayed. The available values are learner, job title, status or score.
Select check boxes	Use the **Select** check boxes, to select learners, and perform actions from the **Actions** menu.
Learner/Job Title	This column displays the name and job title of the learner. Click the learner's name link to open the learner details modal window. Here, you can view the learner details such as Learner ID, Employee ID, Department, Manager and contact information.
Status	This column displays the current status of the learner. Values include: **In-Progress**, **Completed**, **Not Completed**, **Enrolled**, **Dropped**, etc.
Attendance	The instructor can use the buttons to mark attendance of the learner from this page. Values include: Attended (green check), Not Attended (red cross) or Unknown (check and cross buttons are unchecked).
Grade	The instructor can use the buttons to mark grade of the learner from this page. Values include: Passed (green check), Failed (red cross) or Not Graded (check and cross buttons are unchecked).

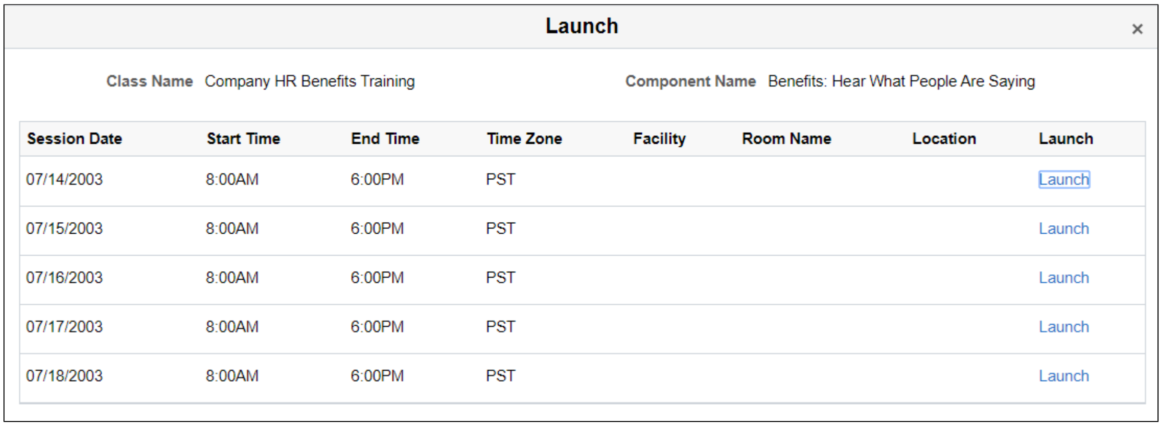
Field or Control	***Description***
Score	Use the Score field to enter the scores for each learner.
Add Comments	Click the Add Comments link to add any comments. Once comments are added, the Add Comments link is replaced with an **Edit Comments** icon, which you can click and edit your comments.
Send Notification	Click the email icon next to learners to send notifications about the class.
Drop Learner	Click the Drop button to access the **Drop Class** page to drop a learner from the class.
Move Learner	Click this button to access the **Enroll Learners** page to search for a different class for the learner.
Edit Payment Details	Click this button to access the **Payment Details** page to view and edit payment details, such as fees and charge back information.

This example illustrates the fields and controls on the Class Details page with a Session open. You can find definitions for the fields and controls later on this page.

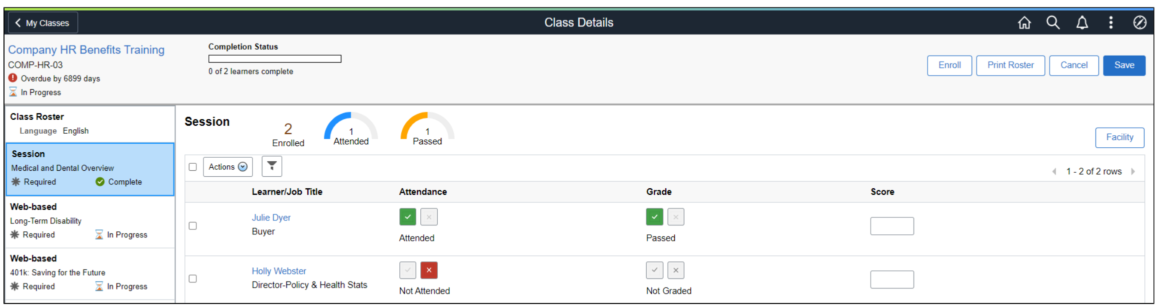


Field or Control	***Description***
Launch button	Click the **Launch** button to access the **Launch** page and launch the web cast.

This example illustrates the fields and controls on the Launch page.



This example illustrates the Class Details page with a <Learning Component>, here a Session, open in the right pane.

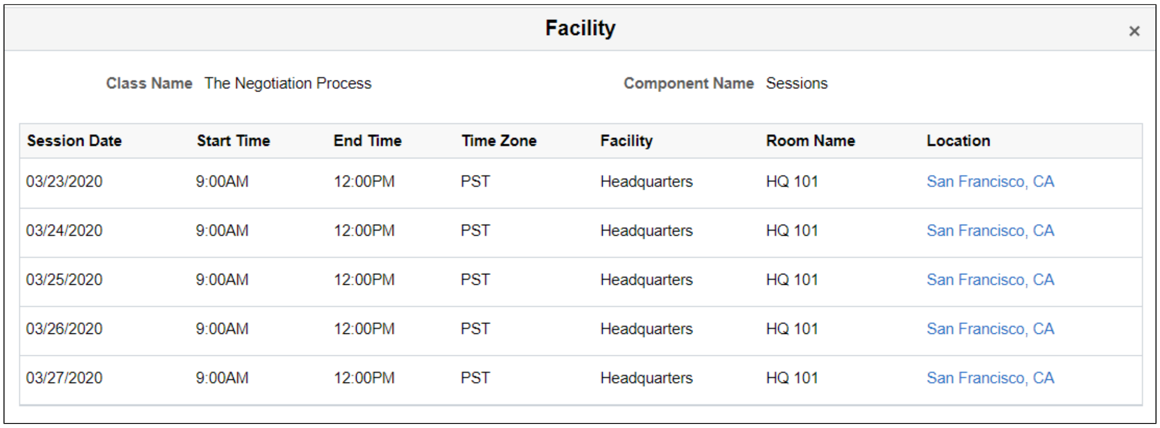


Field or Control	***Description***
Facility button	Click the Facility button to access the Facility Page.

Facility Page

Use the Facility page (LM_SESS_LOC_SCF) for more information on the facility utilized for the selected instructor-led session. This information includes Class and Component names, date, session start and end times, time zone, room number and location.

This example illustrates the fields and controls on the Facility Page.

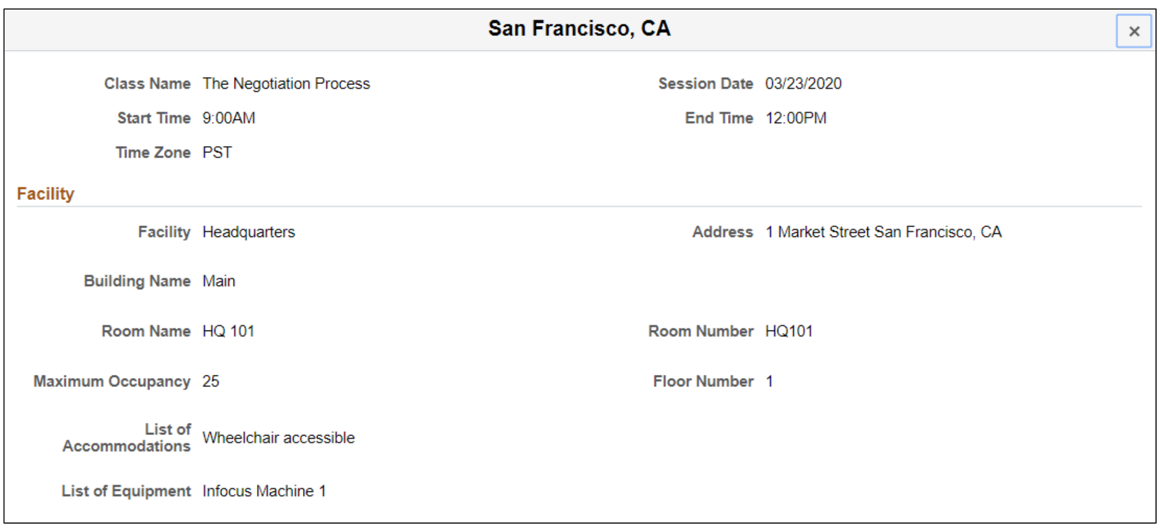

Facility

Class Name The Negotiation Process Component Name Sessions

Session Date	Start Time	End Time	Time Zone	Facility	Room Name	Location
03/23/2020	9:00AM	12:00PM	PST	Headquarters	HQ 101	San Francisco, CA
03/24/2020	9:00AM	12:00PM	PST	Headquarters	HQ 101	San Francisco, CA
03/25/2020	9:00AM	12:00PM	PST	Headquarters	HQ 101	San Francisco, CA
03/26/2020	9:00AM	12:00PM	PST	Headquarters	HQ 101	San Francisco, CA
03/27/2020	9:00AM	12:00PM	PST	Headquarters	HQ 101	San Francisco, CA

The location link takes you to a <Location Name> page, which provides further details on that facility and location.

This example illustrates the fields and controls on the <Location Name> page.



Accessing Instructor Schedules Using the PeopleSoft Fluid User Interface

This topic discusses how Learning Instructors view their schedules using the View Schedules tile available on the Learning Instructor home page.

Pages Used to Access Instructor Schedules Using the PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
View Schedule Tile	LM_SCHEDULE_FL_GBL (cref for the tile) LM_SCH_TILE_FLU (page name for dynamic content)	Access the Schedule page.
Schedule Page	LM_SCHEDULE_FL	View the Learning Instructor's schedule for the day, week or month.
Class Details Page (For Desktop/Tablet devices)	LM_INST_ACT_L_FL	Displays class details and learning components for a selected class from the Class Summary page. Also mark grades, attendance and scores, as well as process mass actions for the selected class.
Class Summary Page (For Smartphones)	LM_INST_ACT_DTL_FL	Access the class details and perform class actions.

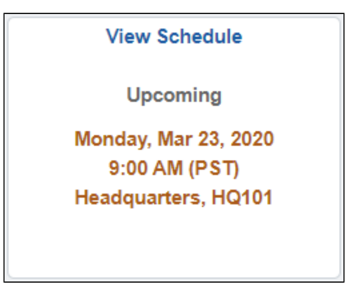
View Schedule Tile

Use the View Schedule (cref for the tile: LM_SCHEDULE_FL_GBL and page name for dynamic content: LM_SCH_TILE_FLU) tile to access the Schedule page for the Learning Instructor.

Navigation:

The View Schedule tile is delivered as part of the Learning Instructor fluid home page.

This example illustrates the View Schedule Tile.



The View Schedule tile displays the upcoming class details for the Learning Instructor. This includes the day, date, time, time zone, location of the class. When no classes are scheduled, the tile displays "No Classes Scheduled". Click the tile to access the Schedule page with the upcoming class as displayed on the tile.

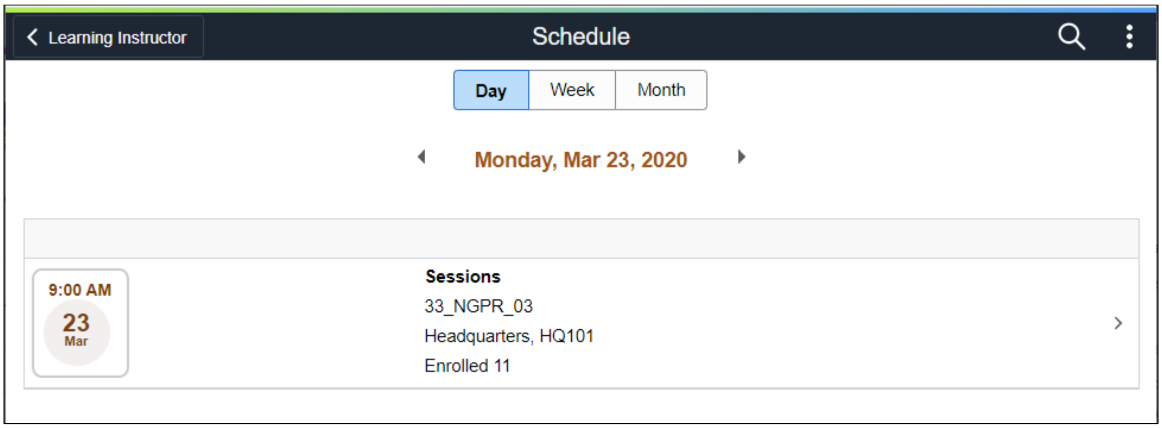
Schedule Page

Use the Schedule page (LM_SCHEDULE_FL) to view the Learning Instructor's schedule for the day, week or month.

Navigation:

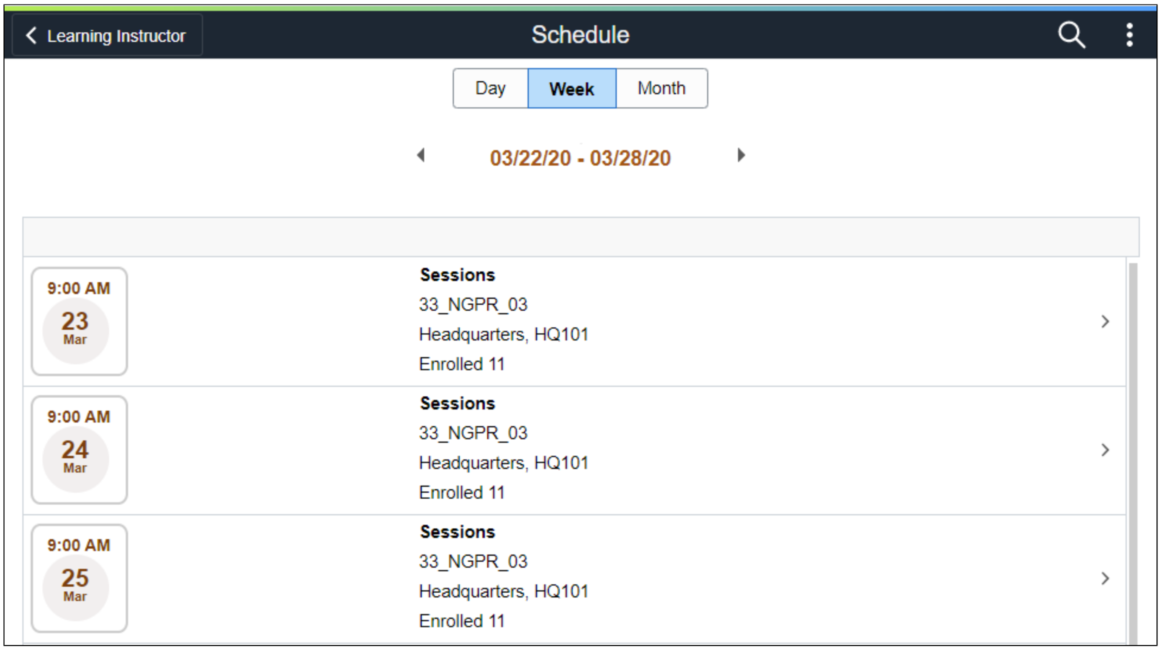
On the Learning Instructor fluid home page, click the View Schedule tile.

This example illustrates the fields and controls on the Schedule page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Day/Week/Month	Select the time period for which you wish to view your schedule. By default, the current day (if there is a class scheduled) or the day of the upcoming class is displayed. Select **Week** or **Month** to display the corresponding week or month in which the class is scheduled for.
<Day, Date, Year>	Click the chevron/date picker on the left or right of the day and date, to display a previous or the next day.
Schedule row	The Schedule row displays the start time and date of the instructor-led session. It also provides the class code, location and the number of learners enrolled for the session. Click a Schedule row or the chevron to access the Class Details Page in a desktop/tablet device or the Class Summary Page from a smartphones.

This example illustrates the Schedule page for Week.



Using the PeopleSoft Fluid User Interface for Talent Administrator Self-Service

This topic discusses the tiles and pages associated with the Talent Administrator home page.

Pages Used to Perform Talent Administrator Self-Service Using the PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Talent Administrator Home Page	LM_LEARNING_ADMIN_FLU_GBL	Access talent administrator self-service transactions.
Enterprise Learning Tile	LM_ENTERPRISE_LEARNING	Access a collection of frequently-used enterprise learning administrative components.
Reports Tile	LM_REPORTS	Access a collection of learning and financial reports.
Manage Notifications Tile	LM_MANAGE_NOTIFICATIONS	Access a collection of frequently-used notification management components.

Talent Administrator Home Page

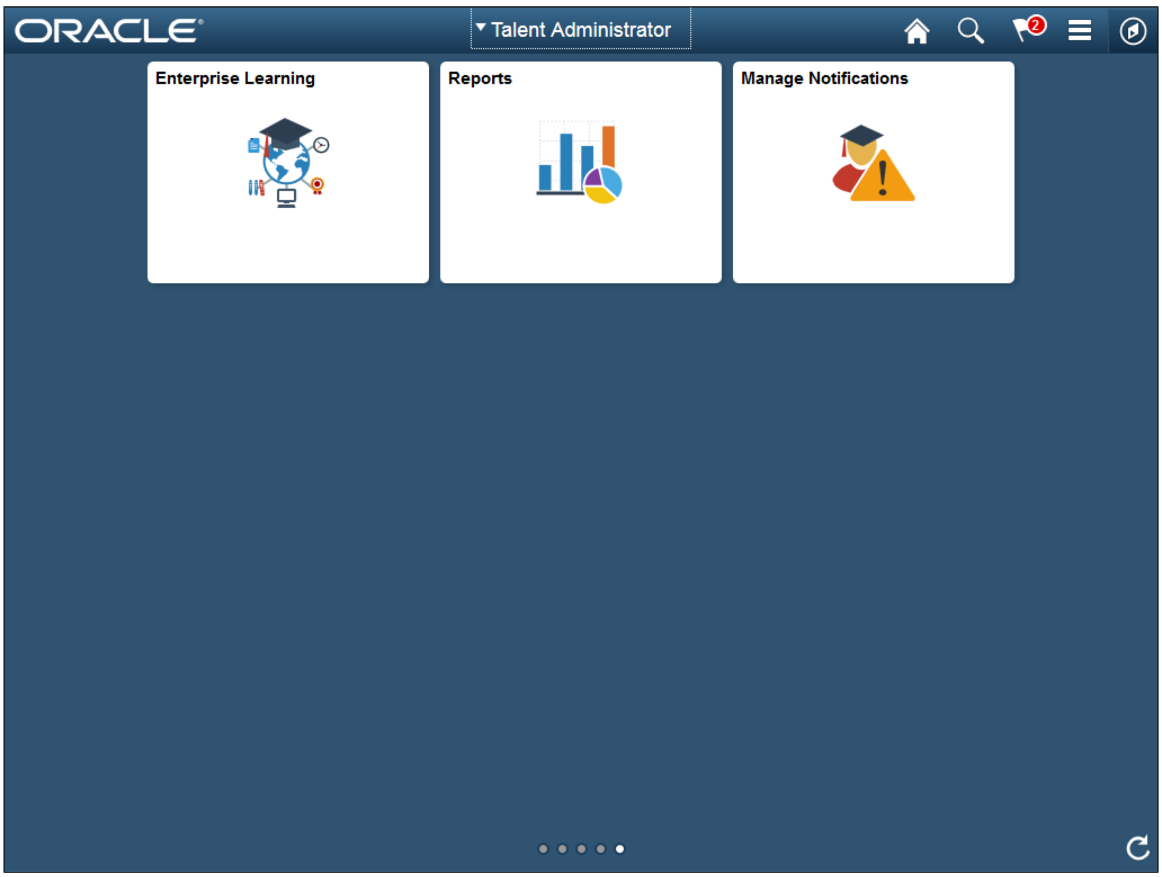
Use the Talent Administrator home page (LM_LEARNING_ADMIN_FLU_GBL) to access talent administrator self-service transactions.

Navigation:

The fluid home appears when you first sign in. The default home page title appears at the top of the home page.

If the Talent Administrator home page is not your default home page, click the title of the default home page and select Talent Administrator from the list that appears.

This example illustrates the Talent Administrator home page.



Enterprise Learning Tile

Use the Enterprise Learning tile (LM_ENTERPRISE_LEARNING) to access a collection of frequently-used enterprise learning administrative components.

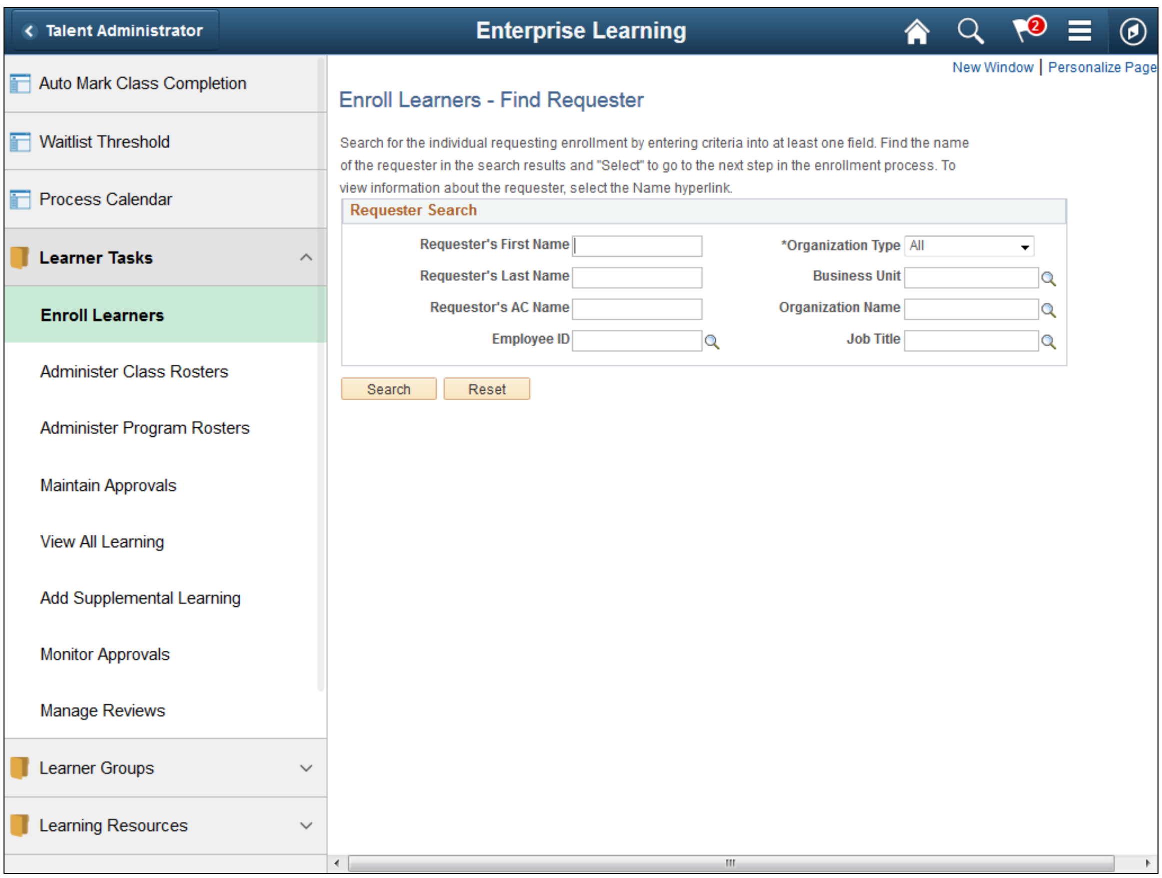
Navigation:

The Enterprise Learning tile is delivered as part of the Talent Administrator fluid home page.

This example illustrates the Enterprise Learning tile.

Click this tile to access the Enterprise Learning application start page.

This example illustrates the fields and controls on the Enterprise Learning application start page.



This navigation collection enables administrators to access frequently-used Enterprise Learning components from one location. The left panel of this page lists three run control components, and additional components collected under three categories:

- Learner Tasks
- Learner Groups

- Learning Resources
- Catalog
- Financial Info
- Mass Enroll
- User Profiles

The right panel displays the component selected in the left panel.

Run Control Pages

Page Name	***Definition Name***	***Usage***
Auto Mark Class Completion Page	LM_AUTOATTD_RUNCTL	Run the Auto Mark Class Completion process.
Waitlist Threshold Page	LM_WLT_TRHLD_NOTIF	Run the Waitlist Threshold process.
Process Calendar	LM_CALENDAR_RNCTL	Run the Process Calendar process.

Learner Task Pages

Page Name	***Definition Name***	***Usage***
Enroll Learners - Find Requester Page	LM_CALL_CENTER_REQ	Search for the individual who is making the enrollment request.
Administer Class Roster Page	LM_ROSTER_SRCH	Find and select class rosters for managing enrollment details, or for marking grades and attendance.
Administer Program Rosters Page	LM_PRG_RSTR_SRCH	Search for and access program rosters to administer.
Maintain Approvals Page	LM_PEN_TRN_REQ	Maintain class, program, and supplemental learning records that require approval.
My Learning - Find Learners Page	LM_ADM_FND_LRNR	Search for and select the learner whose transcript you want to review.

Page Name	***Definition Name***	***Usage***
Supplemental Learning - Find Learners Page	LM_ADM_FND_LRNR	Find and select the learner for whom to report supplemental learning
“Monitor Approvals Page” (Approval Framework)	EOAW_ADM_MON_SRC	Search approval processes and perform mass reassignments.
Manage Reviews Page	LM_RTG_MGRV_REVWS	Manage reviews entered for classes and programs.

Learner Groups Pages

Page Name	***Definition Name***	***Usage***
Maintain Learner Groups Page	LM_LG_SEARCH	Search for or define new learner groups
Populate Learner Groups Page	LM_LRNRGRP_RUNCNTL	Build learner groups by running the Build Learner Group process (LM_ LRNRGR_AE).
Maintain Queries Page	LM_LG_QUERY	Associate learner group query technical names with user-friendly names.

Learning Resources Pages

Page Name	***Definition Name***	***Usage***
Equipment Page	LM_EQP_TBL	Define equipment.
Material Page	LM_MTRL_TBL	Define materials.
Facility Page	LM_FCLTY_TBL	Define a facility.
Facilities Calendar: Monthly Page	LM_MONTHLY_VIEW	View facility scheduling by month.
Session Templates Page	LM_TMPL	Create session templates of common class session characteristics.
Training Region Page	LM_TRNG_REGION	Define training regions.

Catalog Pages

Page Name	*Definition Name*	*Usage*
Maintain Categories - Basic Data Page	LM_CATG_BSC_PG	Define basic category information, such as name, description, status, and owner.
Course Details: Basic Data Page	LM_CI_BASICDTA_PG	Define basic item information, such as description and course code.
Delivery Method Page	LM_DMTHD_BAS_DATA	Define detailed data for the delivery method that is associated with a particular catalog ID.
Maintain Classes - Class Details Page	LM_ACT	Define the class in terms of such things as minimum and maximum attendees, size of the waitlist, last enrollment date, drop dates and penalties for drops, and fees and reminders.
Quick Create Classes Page	LM_CNT_TMPL_LAUNCH	Create a single class by loading class and catalog data from an external file, or by defining the data manually.
Catalog Import Page	LM_CT_LOAD	Quickly import multiple classes into the system.
Maintain Programs - Details Page	LM_PRG_PG	Define general program information and details.
Maintain Keywords Page	LM_KWRD_PG	Create keywords to use when searching the learning catalog.
Define Supplemental Learning - Details Page	LM_ADHC_SETUP_PG	Create or modify supplemental learning types.

Financial Info Pages

Page Name	*Definition Name*	*Usage*
Maintain Purchase Orders Page	LM_PURCHASE_ORDERS	View information for a customer's current purchase orders, and add new purchase orders.

Page Name	***Definition Name***	***Usage***
Maintain Training Units Page	LM_TU_ITEMS	View information for purchased training units and add training units to a training unit pool.
Review Subledger Page	LM_SUBLEDGER_INQ	Review current and historical transactions for a specific subledger group.
Process Payment Details Page	LM_RUNCTL_FI_ENRL	Post enrollment and registration transactions to a subledger.
Export Accounting Entry to GL Page	LM_RUNCTL_GL_INTFC	Export chargeback transactions from a subledger to the general ledger in the financials system.

Mass Enroll Pages

Page Name	***Definition Name***	***Usage***
Process Mass Enrollment Page	LM_MASS_ENRL_RNCTL	Process mass enrollment requests.
Review Mass Enrollment Requests Page	LM_MASS_RQST_DET	Review mass enrollment requests, delete pending requests, and view reports for processed requests.

User Profiles Pages

Page Name	***Definition Name***	***Usage***
Person Info Page	LM_PERSON_INT	Define information about an internal learner.
Profile Info Page	LM_PERSON	Define information about an external learner.
Instructor Page	LM_INSTR	Define an internal or external learner as an instructor. Specify instructor preferences, qualifications, cost, and other important data.

Reports Tile

Use the Reports tile (LM_REPORTS) to access a collection of learning and financial reports.

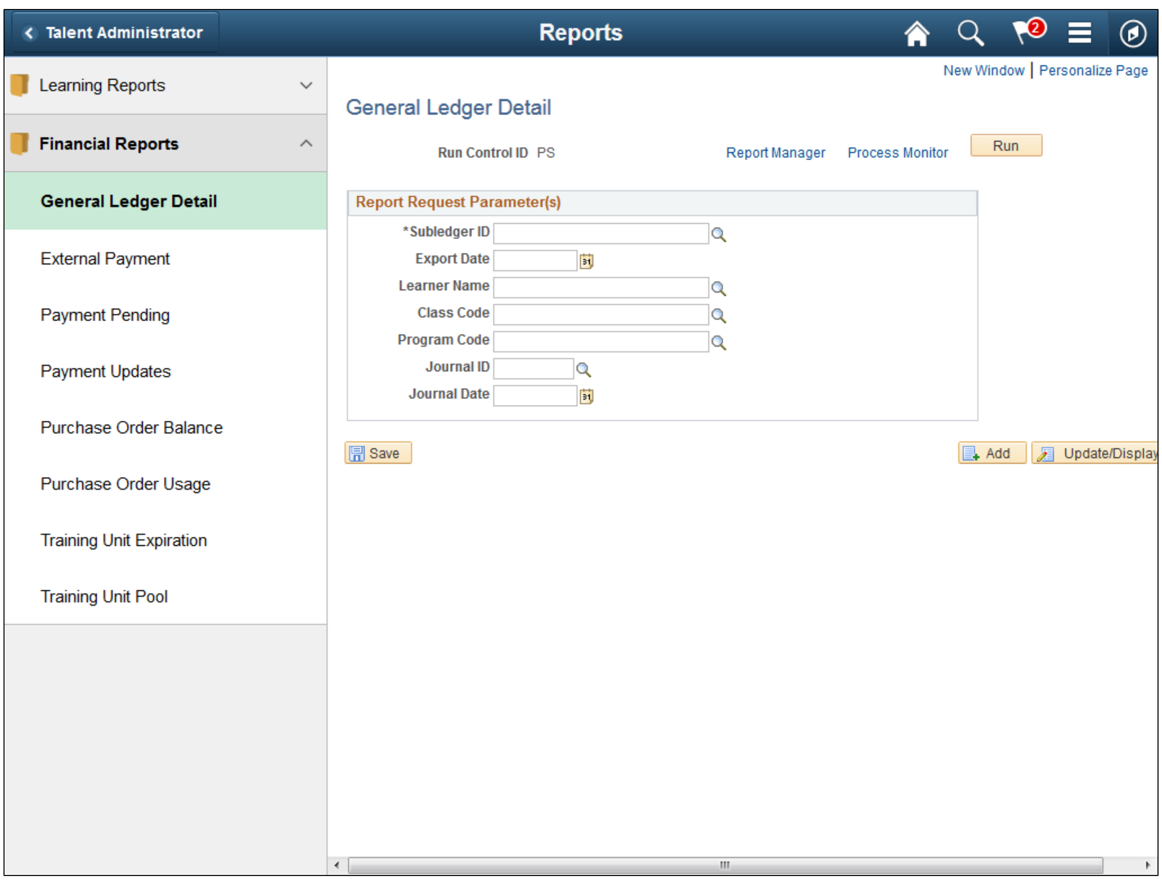
Navigation:

The Reports tile is delivered as part of the Talent Administrator fluid home page.

This example illustrates the Reports tile.

Click this tile to access the Reports application start page.

This example illustrates the fields and controls on the Reports application start page.



This navigation collection enables administrators to access ELM reporting components from one location. The left panel of this page lists the reporting components collected under two categories:

- Learning Reports
- Financial Reports

The right panel displays the component selected in the left panel.

For a complete list of the ELM reports accessible from this application start page, see PeopleSoft Enterprise Learning Management Reports: A to Z.

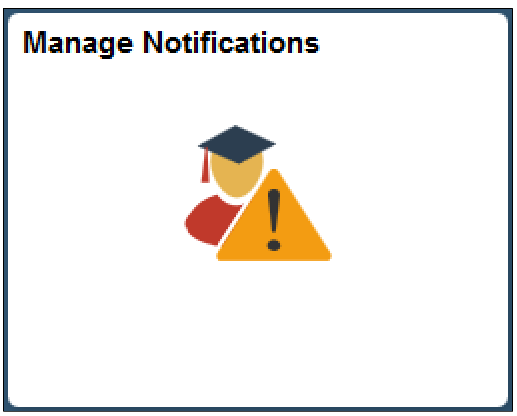
Manage Notifications Tile

Use the Manage Notifications tile (LM_MANAGE_NOTIFICATIONS) to access a collection of frequently-used notification management components.

Navigation:

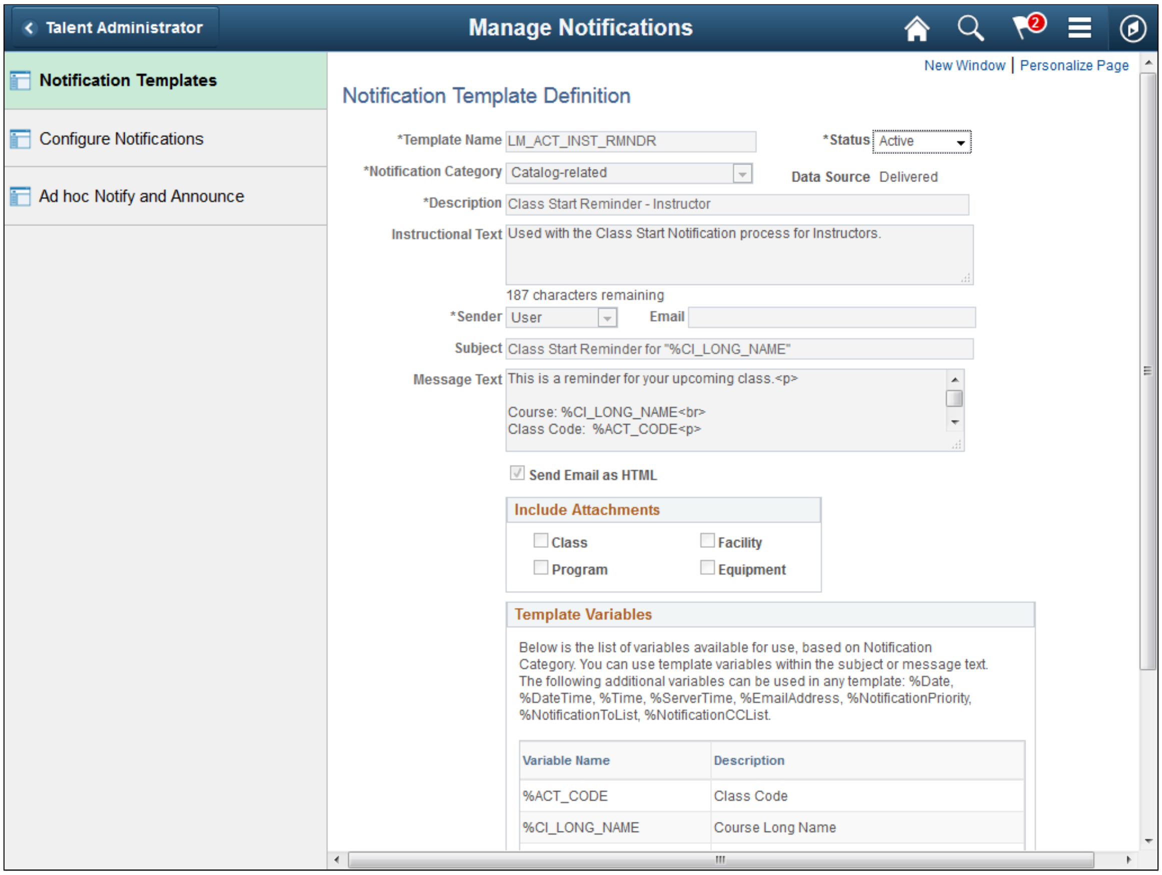
The Manage Notifications tile is delivered as part of the Talent Administrator fluid home page.

This example illustrates the Manage Notifications tile.



Click this tile to access the Manage Notifications application start page.

This example illustrates the fields and controls on the Manage Notifications application start page.



This navigation collection enables administrators to access notification management components from one location. The right panel displays the component selected in the left panel.

Pages Accessible from the Manage Notifications Application Start Page

Page Name	***Definition Name***	***Usage***
Notification Template Definition Page	LM_NOTIF_TMPL	Modify and create notification templates.
Configure Notification Events Page	LM_NOTIF_CONFIG	Modify notification events.
Ad Hoc Notify and Announce Page	RUNCTL_NOTIF_ADHOC	Send and post all ad hoc notifications and announcements with posting dates up to and including the current date.

Chapter 36

Managing Ratings and Reviews

Analyzing Ratings

Page Used to Analyze Ratings

Page Name	***Definition Name***	***Usage***
Analyze Ratings Page	LM_RTG_ANZ_RATINGS	Analyze ratings for classes and programs.

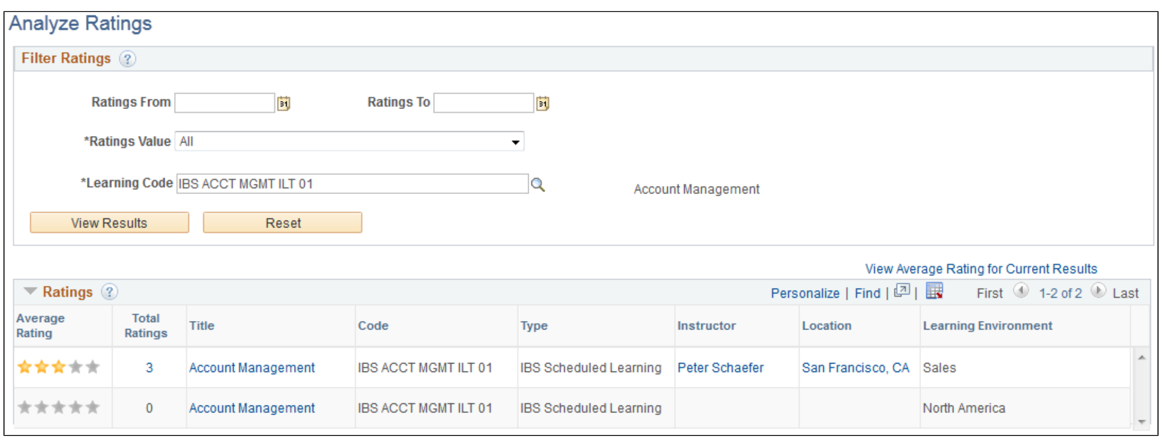
Analyze Ratings Page

Use the Analyze Ratings page (LM_RTG_ANZ_RATINGS) to analyze ratings for a particular class or program and to review or flag the comments provided by the learners for the class or program.

Navigation:

Enterprise Learning > **Analyze Ratings**

This example illustrates the fields and controls on the Analyze Ratings page.



Filter Ratings

Field or Control	***Description***
Ratings From and **Ratings To**	Enter a starting and end dates of the learning you want to analyze.

Field or Control	***Description***
Ratings Value	Enter the rating value of the learning you want to analyze.
Learning Code	Enter a value here to analyze learning with a specific learning code. This is a required value. You can search for a learning code by 'Learning Type', 'Learning Environment' and ‘Learning Title' using the Advanced Search criteria from the learning code look up. If you specify a value for **Ratings From** or **Ratings To**, the system displays only the learning codes that have ratings submitted in the specified date range. If you do not specify a value for **Ratings From** or **Ratings To**, the system displays all learning codes.
View Results	Click to view the learning in the Ratings group box that matches your filter criteria.
Reset	Click to clear all the fields in the Filter Ratings group box and the results in the Ratings group box.

Ratings

Field or Control	***Description***
View Average Rating for Current Results	Click to access the Review Details page where you can view the average combined rating of the results displayed in the Ratings group box.
Average Rating	Displays the average rating for each learning item.
Total Ratings	Displays the number of ratings for each learning item
Title	Displays the title of each learning item. Click to access the Class Details or Program Details page for the learning item.
Code	Displays the learning code for each learning item.
Type	Displays the learning type for each learning item.
Instructor	Displays the name of the instructor for instructor-led learning items. Click the name to view more details about the instructor.

Field or Control	*Description*
Location	Displays the location of learning items that were offered at a specific location. Click the location to view more details about it.
Learning Environment	Displays the learning environment for each learning item.

Related Links

Course Details Modal Page
Program Details Page

Managing Reviews

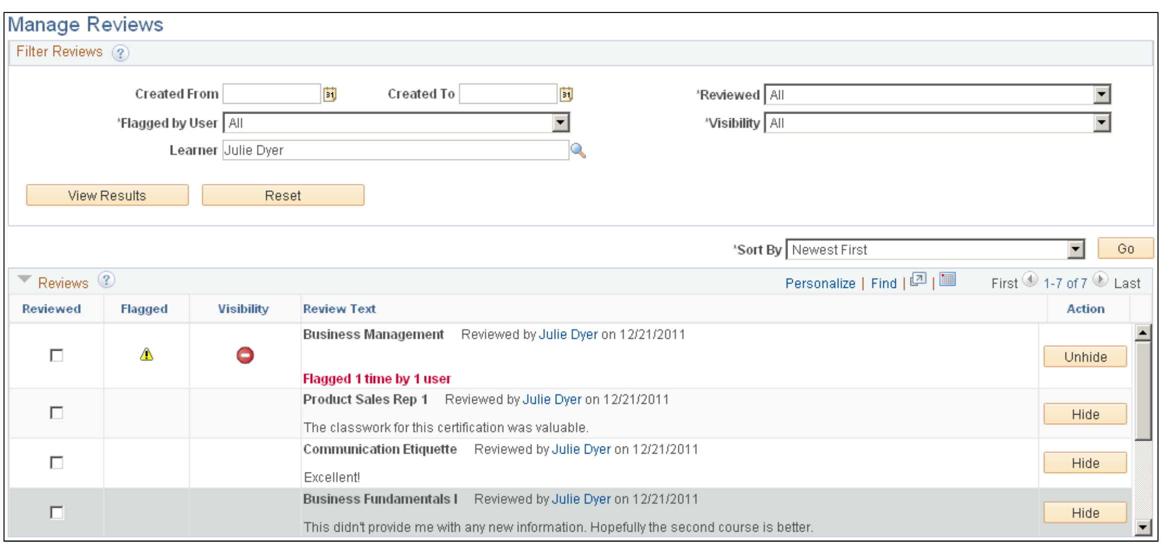
Page Used to Manage Reviews

Page Name	*Definition Name*	*Usage*
Manage Reviews Page	LM_RTG_MGRV_REVWS	Manage reviews entered for classes and programs.

Manage Reviews Page

Use the Manage Reviews page (LM_RTG_MGRV_REVWS) to manage reviews entered for classes and programs.

This example illustrates the fields and controls on the Manage Reviews page.



Filter Review

Field or Control	***Description***
Created From and **Created To**	Enter a creation date range for which you want to manage reviews.
Reviewed	Select whether you want to manage reviews that have already been reviewed. Values are: • *All:* Select to manage all reviews. • *No:* Select to manage reviews that do not have the **Reviewed** check box selected. • *Yes:* Select to manage reviews that have the **Reviewed** check box selected.
Flagged by User	Select whether you want to manage flagged reviews. Values are: • *All:* Select to manage flagged and unflagged reviews. • *No:* Select to manage unflagged reviews. • *Yes:* Select to manage flagged reviews.
Visibility	Select whether you want to manage hidden reviews. Values are: • *All:* Select to manage both hidden and unhidden reviews. • *Hidden:* Select to manage hidden reviews. • *Unhidden:* Select to manage unhidden reviews.
Learner	Enter a value here to manage reviews entered by a specific learner.
View Results	Click to populate the Reviews group box based on the filter criteria you selected.
Reset	Click to clear all the fields in the Filter Review group box and the results in the Reviews group box.

Reviews

Field or Control	***Description***
Sort By	Select how you want to sort the reviews. Values are *Learner, Newest First,* and *Oldest First.*
Reviewed	Select to indicate that the review has undergone review. If you click the **Hide** or **Unhide** buttons for a review, the system selects this check box.
Flagged	Displays an icon for reviews that have been flagged by another user. If you click the Hide button for a review and save the page, this icon appears for the review. If you click the Unhide button for a review and save the page, the system removes this icon for the review.
Visibility	Displays an icon for hidden reviews. The system automatically hides reviews that have been flagged a number of times equal to or greater than the threshold defined in the **Auto Hide Reviews after** field on the Install Defaults - General page. If you click the Hide button for a review and save the page, this icon appears for the review. If you click the Unhide button for a review and save the page, the system removes this icon for the review.
Review Text	Displays information about the review including the learning item name, the user who reviewed it, the date of the review, and the text of the review. You can click the name of the reviewer to access the Learner Information page.
Action	Click the **Hide** button in this column to hide a review. Click the **Unhide** button to make a hidden review visible. When you click the Unhide button, the system removes the Flagged icon from a review. If you click the **Hide** or **Unhide** buttons for a review, the system selects the **Reviewed** check box for it.

Related Links

Review Details Page
Maintaining Learning Records and Objectives Using Employee Self Service
Install Defaults – General Page

Chapter 37

Working with the Text Catalog

Understanding the Text Catalog

This topic provides an overview of the text catalog and lists common elements.

The text catalog, which is used by several PeopleSoft Enterprise applications, stores standard text that appears on the self-service pages, including page labels, field labels, button names, links, page instructions, and warnings. You can modify the text by using the Text Catalog feature.

Entries in the text catalog feature are context-sensitive, meaning that a particular piece of text on a page can vary depending upon the page's usage or context. In Enterprise Learning Management, you can define different text for self-service pages according to learning environment.

Text Catalog Keys

Context-sensitivity is accomplished through the use of keys that enable the application to retrieve applicable text catalog entries.

Although you can have multiple versions of the same text, you do not have to set up a separate entry for every possible scenario. You can create one generic entry where all key values are blank, and then add entries for the situations that vary from the norm. Blank key values function as wildcards.

Warning! When the system looks for a match, it stops searching if the search keys narrow the possible choices to a single row—the lower-order search keys are ignored. If you do not set things up correctly, the system may return the wrong results. Plan ahead before making changes, particularly for complex scenarios. Random changes can lead to errors that are difficult to debug later.

You can test changes by using the Test Text Catalog page. To test an entry, enter the text ID that is associated with the text, plus any combination of key values, and click the **Test** button to view the text that the system retrieves for the keys values you entered.

Text IDs

To update a text entry, you need its ID. Use the **Display Text ID** option on the Configure Text Catalog page to find this information. When you activate this option, the text IDs appear in place of the corresponding text on self-service pages and warnings.

To view the correct text IDs, you need to create the conditions that cause the page or warning to appear. For example, you might need to sign in as a user who is assigned to a particular learning environment.

Note: You may want to activate this option, print a copy of the self-service pages, and then deactivate it. This provides a hardcopy reference of all the text IDs used on each self-service page.

Common Elements Used in this Topic

Field or Control	***Description***
Text ID	The unique identifier that you entered to access entries in the text catalog.
Effective Date	The date on which a particular text catalog entry becomes active. Delivered text is defined as system data in the Enterprise Learning Management database and has an effective date of 1/1/1900. **Important!** To prevent future updates to Enterprise Learning Management from overwriting any text entries that you add or modify, use a later effective date when you add new text entries, and insert a new effective date when you modify delivered text.

Setting Up the Text Catalog

Pages Used to Work with the Text Catalog

Page Name	***Definition Name***	***Usage***
Configure Text Catalog Page	HR_SSTEXT_CFG	Configure the text catalog for an application.
Maintain Text Catalog Page	HR_SSTEXT_TEXT	Define text catalog entries, and associate with context-sensitive keys.
Maintain Text Catalog: HTML View Page	HR_SSTEXT_HTML	View text catalog entries as HTML.
Self-Service Text Translation: Descriptions Page	HR_SSTEXT_LANG	Select and describe the languages into which a text catalog entry is translated.
Self-Service Text Translation: Catalog Text Page	HR_SSTEXT_LANG2	Enter translations for text catalog entries
Test Text Catalog Page	HR_SSTEXT_TEST	Test the text retrieval for a text ID, using any combination of key values.
Text Catalog - View All Keys Page	HR_SSTEXT_ALLKEYS	View versions and context-key entries for a particular text ID and effective date combination.

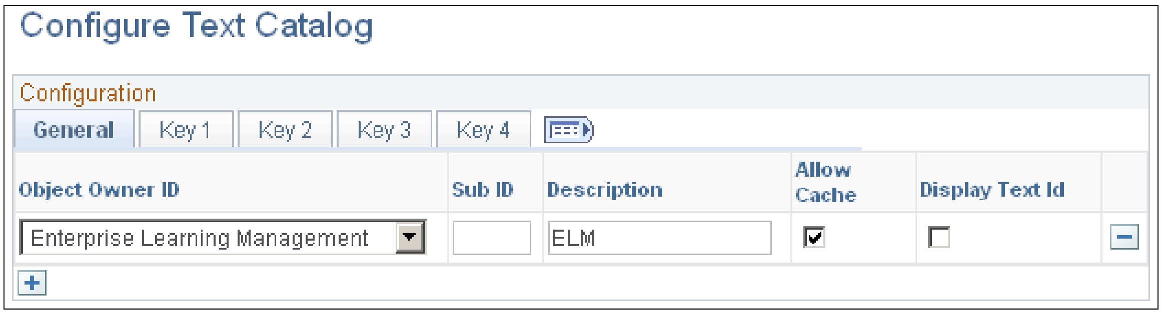
Configure Text Catalog Page

Use the Configure Text Catalog: General page (HR_SSTEXT_CFG) to configure the text catalog for an application.

Navigation:

Set Up ELM > **Text Catalog** > **Configure Text Catalog** > **Configure Text Catalog**

This example illustrates the fields and controls on the Configure Text Catalog page.



General Tab

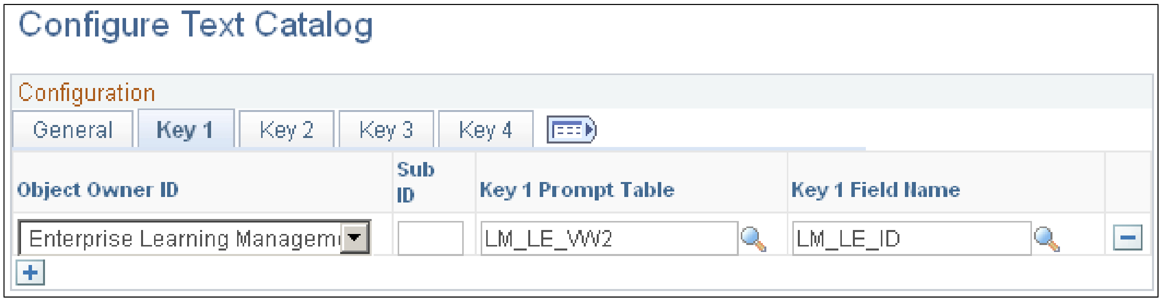
Use this tab to configure options that affect the operation of the text catalog within Enterprise Learning Management.

Field or Control	***Description***
Object Owner ID	This field identifies the application for which you are configuring text catalog options. Many PeopleSoft Enterprise applications use the text catalog feature. You can use this field to add or remove applications from the text catalog
Allow Cache	Select this check box to load the entire contents of the text catalog into cache upon access to the application. This enhances system performance because the system does not have to do a database call every time it needs to retrieve a text catalog entry.
Display Text ID	Select to have the system identifiers of the text entry appear instead of the corresponding text. You can use this option to find out which text ID corresponds to a particular piece of text that you want to modify.

Key 1 Tab

Use the Key 1 tab to define a context key.

This example illustrates the fields and controls on the Configure Text Catalog: Key 1 tab.



Field or Control	*Description*
Sub ID	This field enables you to subcategorize within object owner classes. For example, within Enterprise Learning Management, you can create a Sub ID for different areas within the application, like self service and administration. You can then use this value when searching for text id objects on the Maintain Text Catalog component. This key would be useful when there are more than 300 text id objects and users need a way to further refine their search. It is used as part of the search parameters on the text catalog setup pages.
Key 1 Prompt Table	Select the object name of the prompt table that defines the values by which the text catalog is partitioned for an application. The values in this prompt table appear when a text catalog entry is defined and modified. You select the value that pertains to the context in which the entry appears on self-service pages or notifications. For example, Enterprise Learning Management provides a context key for learning environments. The related prompt table is the LM_LE_VW table, which contains the values for your organization's learning environments.
Key 1 Field Name	Select the field in the prompt table that contains the value that appears in the prompt list for this key. The context key that is delivered with Enterprise Learning Management prompts for the learning environment values stored in the LM_LE_ID field in the LM_LE_VW table.

Note: If you enter a value for the prompt table, you must also enter a value for the field name in the same row.

Key 2, Key 3, and Key 4 Tabs

The Key 2, Key 3, and Key 4 tabs are identical in appearance and usage to the Key 1 page.

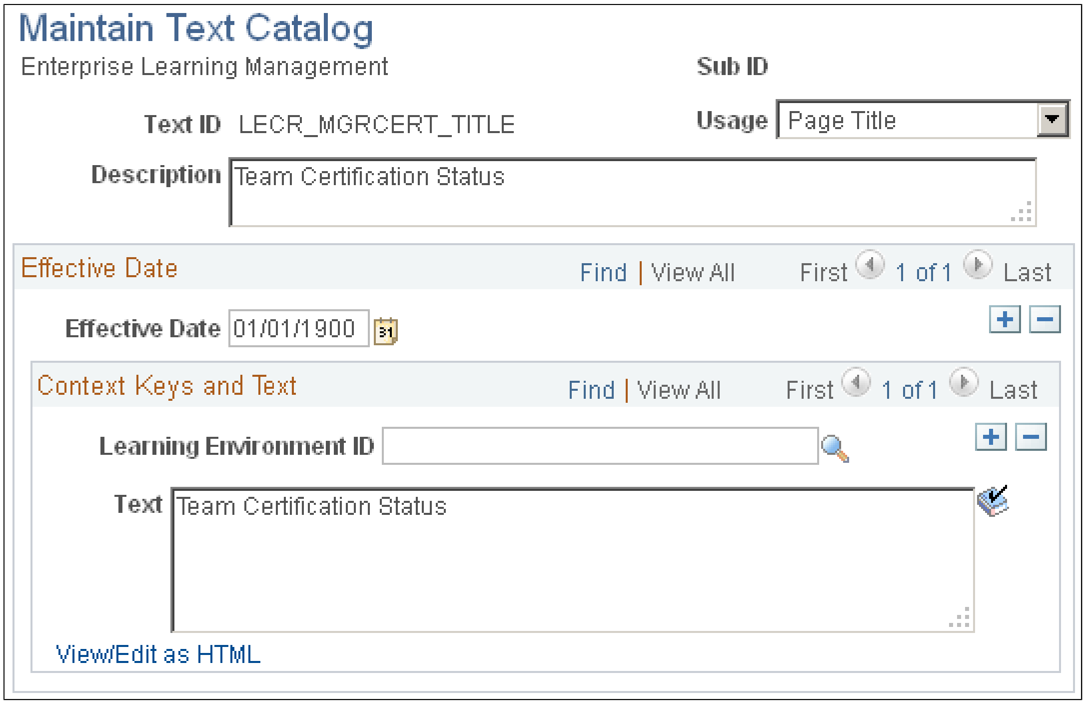
Maintain Text Catalog Page

Use the Maintain Text Catalog page (HR_SSTEXT_TEXT) to define text catalog entries, and associate with context-sensitive keys.

Navigation:

Set Up ELM > **Text Catalog** > **Maintain Text Catalog** > **Maintain Text Catalog**

This example illustrates the fields and controls on the Maintain Text Catalog page.



Field or Control	***Description***
Usage	The place where the entry is used: *Email Body, Email Subject, Error/Warning, Field Label, Grid/Scroll Heading, Groupbox Title, Hyperlink/Button, Page Instructions,* or *Page Title.* The only text entries that you cannot modify are translate values and error messages that appear in Microsoft Windows error boxes. You can use this field to search the Maintain Text Catalog page when you don't have the text ID, but you do have the specific text.

Context Keys and Text

The context key fields that appear on this page are determined by the text catalog configuration for the application. Use the context keys to target the message or text to a particular audience or specify the conditions under which the text is appropriate.

Note: A blank value for any key is a wildcard and means that the entry appears in all contexts of the key.

For example, the previous page shot shows a configuration of a page title. The title text that is defined in the text box applies to all learning environments.

For each text ID and effective date combination, define a complete wildcard entry in which you leave all key fields blank. This entry, known as the root entry, is the default text entry that's used when no key value is specified.

Field or Control	***Description***
View/Edit as HTML	Click to view and edit the HTML tags if the text will appear in an HTML area on the page.

Text Substitution

The text strings that are substituted for specific tokens, such as %1 and %2, are different for each application that uses substitution in the text catalog. They are delivered with the application.

Token substitution in the text catalog works in the same way as in the PeopleTools Message Catalog. You supply the values for the tokens in a PeopleCode function call at runtime. The values are replaced by parameters in the PeopleCode when the text is rendered on the application pages. To use this feature, you must know PeopleCode.

If you want to update the delivered text IDs such that the substitution tokens take on a different meaning or are resequenced, you also need to make corresponding changes to the PeopleCode that calls the text catalog feature retrieval functions, since this copies supplier values to use in place of the tokens.

See the product documentation for *PeopleTools: PeopleCode Developer's Guide*.

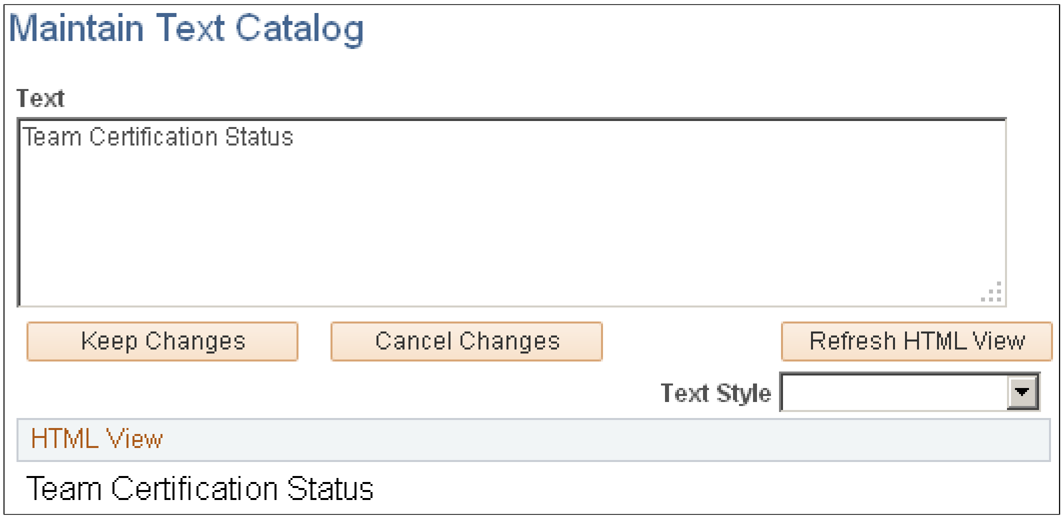
Maintain Text Catalog: HTML View Page

Use the Maintain Text Catalog: HTML View page (HR_SSTEXT_HTML) to view text catalog entries as HTML.

Navigation:

Click the **View/Edit as HTML** link on the Maintain Text Catalog page.

This example illustrates the fields and controls on the Maintain Text Catalog: HTML View page.



Field or Control	***Description***
Text Style	Select the style to apply to the text. After you apply a style (for example, *PABOLDTEXT* or *PAERRORTEXT)* to a text entry, the **HTML View** page region shows how the text will appear on self-service pages.

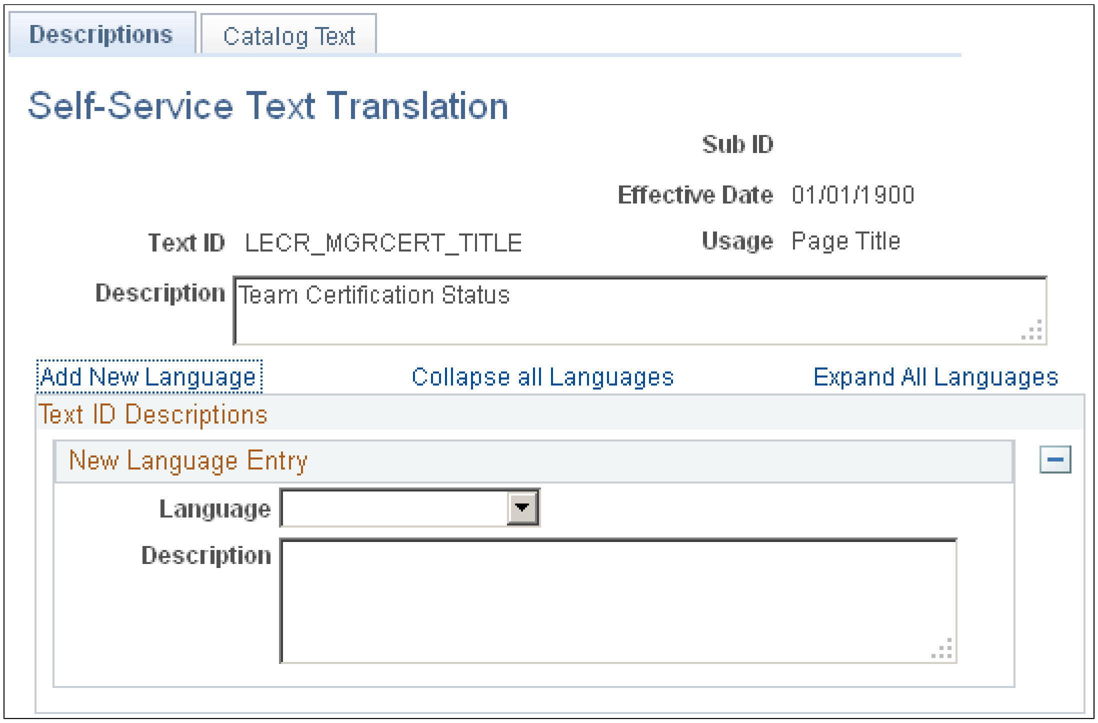
Self-Service Text Translation: Descriptions Page

Use the Self-Service Text Translation: Descriptions page (HR_SSTEXT_LANG) to select and describe the languages into which a text catalog entry is translated.

Navigation:

Set Up ELM > **Text Catalog** > **Translate Text Catalog** > **Self-Service Text Translation** > **Descriptions**

This example illustrates the fields and controls on the Self-Service Text Translation: Descriptions page.



Use this page to view a text catalog entry and the languages into which it is translated. The **Collapse all Languages** and **Expand All Languages** enable you to control the way the list of languages appears. You can add and remove languages on this page, but you cannot enter translation text.

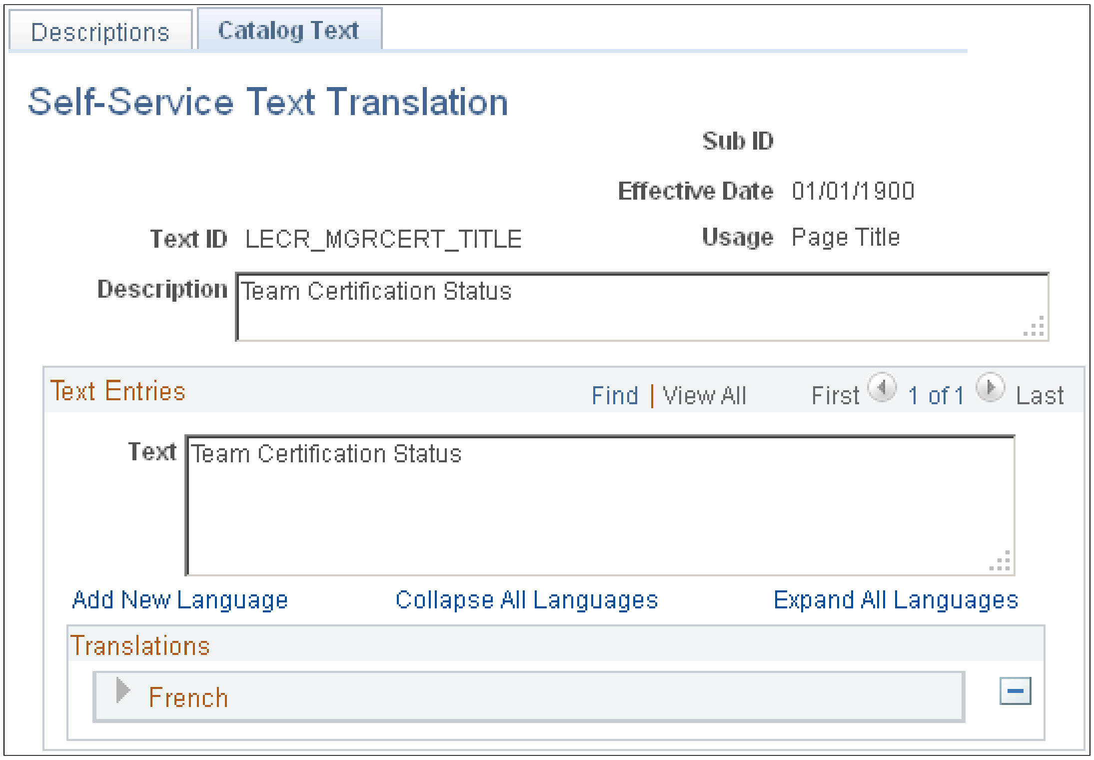
Self-Service Text Translation: Catalog Text Page

Use the Self-Service Text Translation: Catalog Text page (HR_SSTEXT_LANG2) to .

Navigation:

Set Up ELM > **Text Catalog** > **Translate Text Catalog** > **Self-Service Text Translation** > **Catalog Text**

This example illustrates the fields and controls on the Self-Service Text Translation: Catalog Text page.



Use this page to enter translations into the text catalog. The **Collapse all Languages** and **Expand All Languages** enable you to control the way the list of languages and translation entries appears. You can add and remove languages on this page and view the text you are translating.

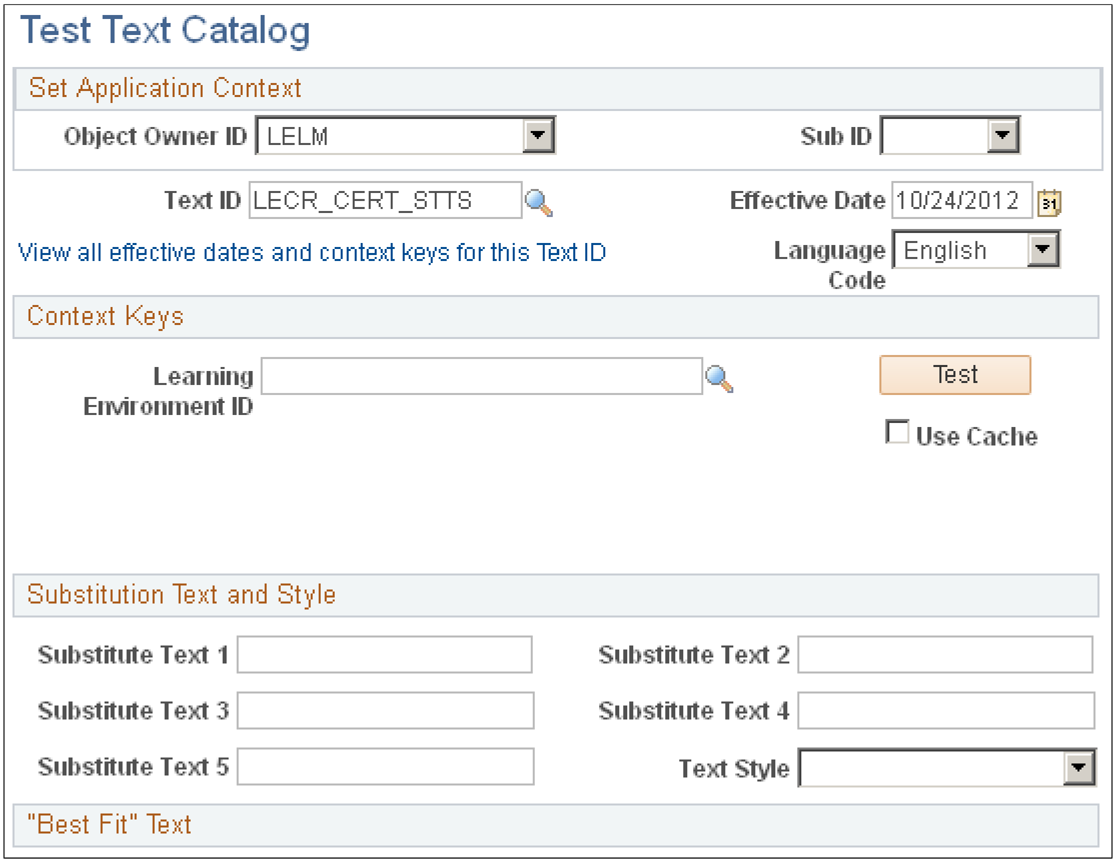
Test Text Catalog Page

Use the Test Text Catalog page (HR_SSTEXT_TEST) to test the text retrieval for a text ID, using any combination of key values.

Navigation:

Set Up ELM > **Text Catalog** > **Invoke Text Catalog API**

This example illustrates the fields and controls on the Test Text Catalog page.



This page enables you to enter parameters for testing how the entries in the text catalog appear on self-service pages, given a set of parameters that you enter.

To test the text retrieval:

1. Enter the text ID for the text.
2. (Optional) Enter values for any key fields.
   - If you leave all key fields blank, the system returns the root text when you click the Test button.
   - If you enter values for key fields, the system searches for the text with the best fit.
3. (Optional) Enter values in one or more of the Substitution Variable fields.

   When you click the Test button, the system replaces the variable (%1, %2, %3, %4, and %5) in the text entry with the value that you enter here.
4. (Optional) Select a text style to see the returned text rendered in a particular HTML style.

   This features helps you visualize how the text appears on the self-service page. Values are *PAAADDITIONALINSTRUCTIONS*, *PABOLDTEXT, PAERRORTEXT, PAPAGEINSTRUCTIONS*, and *PAPAGETITLE*.
5. Click the Test button.

The text entry that best matches the search criteria and context keys for the selected text ID appears.

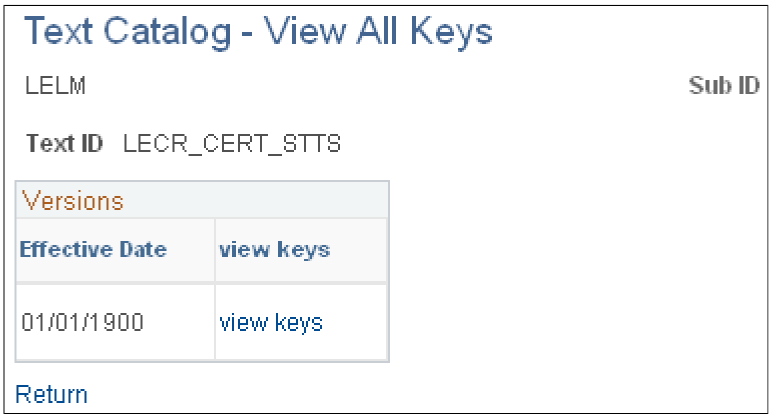
Text Catalog - View All Keys Page

Use the Text Catalog - View All Keys page (HR_SSTEXT_ALLKEYS) to View versions and context-key entries for a particular text ID and effective date combination.

Navigation:

On the Maintain Text Catalog page or the Test Text Catalog page click the link labeled View all effective dates and context keys for this Text ID.

This example illustrates the fields and controls on the Text Catalog - View All Keys page.



The **Versions** group box lists all effective-dated versions of the selected text ID.

Click the **View Keys** link to list each set of context keys that is associated with the selected version. Click the language link to view the text that is associated with the context keys for the indicated language.

Chapter 38

Reviewing Delivered Learner Group Queries

Learner Organization Queries

The following table lists all queries and criteria with learner *organization* parameters.

Query Name	***Criteria***	***Description***
LM_LG_A_LEARNER_ ORGANIZATION	Department ID, Business Unit, Region, State, Learning Environment, Preferred Language	Group learners by department, region, state, within a learning environment and language preference
LM_LG_A_LRNR_ORGANIZATION_ 1	Department ID, Business Unit, Region	Group learners by department and regulatory region.
LM_LG_A_LRNR_ORGANIZATION_ 2	Region, Learning Environment	Group learners by regulatory region, and learning environment.
LM_LG_A_LRNR_ORGANIZATION_ 3	Department ID, Business Unit	Group learners by department. For department reporting.
LM_LG_A_LRNR_ORGANIZATION_ 4	Department ID, Business Unit, State	Group learners by department and state.
LM_LG_A_LRNR_ORGANIZATION_ 5	Organization ID, State	Group learners by organization/customer and state. For customer reporting.
LM_LG_A_LEARNER_LE	Learning Environment	Group learners by learning environment

Learner Job Code Queries

The following table lists all queries and criteria with learner *learning environment* parameters.

Query Name	***Criteria***	***Description***
LM_LG_A_JOB_CODE	Learner Job Code	Group learners by job code
LM_LG_A_JOB_CODE_1	Job Code, Region	Group learners by job code and regulatory region

Query Name	***Criteria***	***Description***
LM_LG_A_JOB_CODE_2	Job Code, State	Group learners by job code and state
LM_LG_A_JOB_CODE_3	Job Code, Learning Environment	Group learners by job code within a learning environment

Learner Course Queries

The following table lists all queries and criteria with learner *course* parameters.

Query Name	***Criteria***	***Description***
LM_LG_A_CATALOG_ITEM_1	Department, Business Unit, Course Code, Enrollment Status, Start Date, End Date	Group learners in a department and business unit with specific enrollment status in a class (course code) in a given start date range.
LM_LG_A_CATALOG_ITEM_2	Course Code, Learning Environment, Enrollment Status, Start Date, End Date	Group learners in a learning environment with specific enrollment status in a class (course code) in a given start date range.

Learner Missing Training Queries

The following table lists all queries and criteria with learner *missing training (by course code or program code)* parameters. These queries identify learners who have not completed a particular training item. That is, the course is not on the learner's plan, or if it is on the learner's plan, it has a status other than *completed.*

Query Name	***Criteria***	***Description***
LM_LG_A_MISSING_TRAINING_1	Course Code, Start Date From, Start Date To, Learning Environment, State	Group learners who have not enrolled or planned a particular class (course) in a date range, belonging to a learning environment and state.
LM_LG_A_MISSING_TRAINING_2	Course Code, Start Date From, Start Date To, Department, Business Unit, Learning Environment	Group learners who have not enrolled or planned a particular class (course) in a date range, belonging to a department.

Learner Program Queries

The following table lists all queries and criteria with learner *program* parameters.

Query Name	***Criteria***	***Description***
LM_LG_A_PROGRAM	Program ID, Status, Registered Date From, Registered Date To, Learning Environment	Learners in a particular learning environment who have a certain status for a program, and who were registered within the date range you specify.
LM_LG_A_MISSING_PROGRAM	Program ID, Business Unit, Department, Learning Environment, Completed Date From, Completed Date To	Learners in a particular learning environment, department, and business unit who have not completed a program within the date range you specify.

Chapter 39

Workflow Notifications and Attachments

Class Workflow Notifications

This topic lists the delivered workflow notifications the system uses to send out automatic class notifications to learners, instructors, and administrators. With the exception of the Course update notification, which is sent realtime, use the Class Notifications page to generate the class workflow notifications.

The delivered workflow notifications include:

- Class reminder.
- Class reminder - instructor.
- Minimum enrollment met alert.
- Learning period expiration.
- Course update.
- Class scheduled for instructor.

Related Links

Sending Class Notifications

Class Reminder

This topic describes the delivered Class Reminder workflow notification.

Field or Control	***Description***
Trigger Description	The current date is either equal to the class reminder date or to the start date minus the reminder days, depending on how you set it up in the Start Reminder group box on the Class Details page.
Action Description	Reminds enrolled learners that the class is scheduled to start soon.
Template Name	LM_ACT_RMNDER
Processing Type	Batch

Related Links

Defining Class Details

Class Reminder - Instructor

This topic describes the delivered Class Reminder - Instructor workflow notification.

Field or Control	***Description***
Trigger Description	The current date is either equal to the class reminder date or to the start date minus the reminder days, depending on how you set it up in the Start Reminder group box on the Class Details page.
Action Description	Reminds class instructors that the class is scheduled to start soon.
Template Name	LM_ACT_INST_RMNDR
Processing Type	Batch

Minimum Enrollment Met Alert

This topic describes the delivered Minimum Enrollment Met Alert workflow notification.

Field or Control	***Description***
Trigger Description	When the minimum enrollment for the class has not been met. Minimum enrollment is set in the Enrollment group box of the Class Details page.
Action Description	Alerts the class administrator and class owner that the minimum enrollment has not been met for a class. This notification helps the administrator decide whether to cancel the class due to low enrollment. This notification is not sent out if the minimum enrollment has been met.
Template Name	LM_ACT_MINEN
Processing Type	Batch

Related Links

Defining Class Details

Learning Period Expiration

This topic describes the delivered Learning Period Expiration workflow notification.

Field or Control	***Description***
Trigger Description	When the number of days before the learning period end date has been met as defined in the Send Warning field on the Class Details page, or when the class end date has been met, as defined on the Class Details page, which ever comes first.
Action Description	Alerts the learner that the learning period of a class in which the learner is enrolled is going to expire in a given number of days. This is useful in alerting learners who have not yet completed their learning, since they may not have access to the learning components after the learning period expires.
Template Name	LM_ACT_LRNPD
Processing Type	Batch

Related Links

Defining Class Details

Course Update

This topic describes the delivered Course Update workflow notification.

Field or Control	***Description***
Trigger Description	A course is modified.
Action Description	Alerts the course owner that the item definition has been updated.
Template Name	LM_CS_CI_UPDATE
Processing Type	Realtime Transaction

Related Links

Creating Courses

Class Scheduled for Instructor

This topic describes the delivered Class Scheduled for Instructor workflow notification.

Field or Control	***Description***
Trigger Description	An instructor is assigned to teach a session of a class.
Action Description	Alerts an instructor that she has been assigned to teach a session of a class.
Template Name	LM_ACT_INST_SCHED
Processing Type	Batch

Learning Objectives Workflow Notifications

This topic lists the delivered workflow notifications the system uses to send out automatic objectives notifications to administrators. The delivered workflow notifications include:

- Competency table update.
- Person competency update.
- OBJV rating models.

Competency Table Update

This topic describes the delivered Competency Table Update workflow notification.

Field or Control	***Description***
Trigger Description	Run the competency synch messages.
Action Description	Notifies the Application Message Administrator when: • Updates are made successfully. • Add message is received and record already exists. • Change message is received and records do not exist. • Delete notification is received.
Template Name	LM_OBJV_COMPETENCY
Processing Type	Realtime Transaction

Related Links

Understanding Objective and Profile EIPs

Person Competency Update

This topic describes the delivered Person Competency Update workflow notification.

Field or Control	***Description***
Trigger Description	Run the person competency synch messages.
Action Description	Notifies the Application Message Administrator when: • Message is successfully processed. • Delete message is received and error is not processed. • Person does not exist in Enterprise Learning Management and error message is not processed. • Competency code is not defined in Enterprise Learning Management and error message is not processed.
Template Name	LM_OBJV_PERSON_COMPETENCY
Processing Type	Realtime Transaction

Related Links

Understanding Objective and Profile EIPs

OBJV Rating Models

This topic describes the delivered OBJV Rating Models workflow notification.

Field or Control	***Description***
Trigger Description	Run the rating model synch messages.
Action Description	Notifies the Application Message Administrator when: • A new rating model is successfully added. • A subscription was unsuccessful due to an action being something other than update.
Template Name	LM_OBJV_RATING_MODELS
Processing Type	Realtime Transaction

Related Links

Understanding Objective and Profile EIPs

Curricula and Certification Workflow Notifications

This topic lists the delivered workflow notifications the system uses to send out automatic program notifications to learners whenever there is a relevant registration status change for a curriculum or certification registration. Use the Enrollment Notifications page to generate these notifications.

The delivered workflow notifications includes:

- Program registration approval.
- Program registration approval to manager.
- Program registration confirmation notice.
- Program completion notice.
- Program registration drop notice.
- Program registration denied.
- Program pending payment.
- Coordinator assignment notification.
- Certification issue.
- Certification reissue.
- Certification warning.
- Certification expiration.
- Certification revocation.
- Certification waiver.
- Registration incomplete.

Related Links

Sending Enrollment, Registration, and Waitlist Notifications

Program Registration Approval

This topic describes the delivered Program Registration Approval workflow notification.

Field or Control	***Description***
Trigger Description	Learner registers for the program and the program requires approval. Also generated when training units or purchase order is used as the payment method, the program requires payment approval, and the training unit pool or purchase order has an owner assigned.

Field or Control	Description
Action Description	• Alerts the learner that registration for the program is pending approval. • Provides the learner with the program name, program code, registration confirmation number, and registration status. • Directs the learner to the My Learning page for more details.
Template Name	LM_REG_PEAP_LRNR
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page
Process Mass Enrollment Page

Program Registration Approval to Manager

This topic describes the delivered Program Registration Approval to Manager workflow notification.

Field or Control	Description
Trigger Description	Learner registers for the program and the program requires approval.
Action Description	• Alerts the manager that she or he must approve this registration request. • Provides the manager with learner's name, program name, program code, confirmation number, and registration status. • Directs the manager to the Maintain Approvals page to approve or decline the request.
Template Name	LM_REG_PEAP_MGR
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page
Process Mass Enrollment Page

Program Registration Confirmation Notice

This topic describes the delivered Program Registration Confirmation Notice workflow notification.

Field or Control	***Description***
Trigger Description	A learner, manager, or administrator registers learner for a program and learner is successfully registered or an administrator updates a learner's program status to Register.
Action Description	• Confirms learner's program registration. • Provides the learner with program name, program code, confirmation number, and registration status. • Directs the learner to the My Learning page for more details.
Template Name	LM_REG_CONF
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page
Process Mass Enrollment Page
View Certification Roster Page
Maintain Approvals Page

Program Completion Notice

This topic describes the delivered Program Completion Notice workflow notification.

Field or Control	***Description***
Trigger Description	Learner completes the program.
Action Description	• Confirms learner's completion of the program. • Provides the learner with program name, program code, confirmation number, and registration status. • Informs the learner that her or his learning history will be updated to reflect the accomplishment. • Directs the learner to the My Learning page for more details.
Template Name	LM_REG_COMP

Field or Control	Description
Processing Type	Batch

Program Registration Drop Notice

This topic describes the delivered Program Registration Drop Notice workflow notification.

Field or Control	Description
Trigger Description	A learner, manager, or administrator drops a program registration.
Action Description	• Alerts the learner that her or his registration for the program has been dropped. • Provides the learner with program name, program code, confirmation number, and registration status.
Template Name	LM_REG_DROP
Processing Type	Batch

Related Links

View Certification Roster Page

Program Registration Denied

This topic describes the delivered Program Registration Denied workflow notification.

Field or Control	Description
Trigger Description	An approver denies a registration.
Action Description	• Alerts the learner that her or his registration for the program has been denied. • Provides the learner with program name, program code, confirmation number, and registration status.
Template Name	LM_REG_DENIED
Processing Type	Batch

Related Links

View Certification Roster Page

Maintain Approvals Page

Program Pending Payment

This topic describes the delivered Program Pending Payment workflow notification.

Field or Control	***Description***
Trigger Description	Learner registers in a program using Cash or Check as payment method.
Action Description	• Alerts the learner that registration for the program is pending payment. • Provides learner with the program code, program name, confirmation number and registration status.
Template Name	LM_REG_PEPA_LRNR
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page

Process Mass Enrollment Page

Coordinator Assignment Notification

This topic describes the delivered Coordinator Assignment Notification workflow notification.

Field or Control	***Description***
Trigger Description	The administrator assigns the instructor as a coordinator for a program.
Action Description	• Informs the instructor that she or he has been assigned coordinator for the certification program. • Provides instructor with program name and program code. • Refers instructors to the Instructor Schedule page for details.
Template Name	LM_LECR_COORD_RMNDR
Processing Type	Batch

Related Links

Maintain Programs - Details Page

Certification Issue

This topic describes the delivered Certification Issue workflow notification.

Field or Control	***Description***
Trigger Description	An administrator issues a certification using a status of Complete.
Action Description	• Alerts the learner that her or his certification has been issued. • Provides the learner with the certification name.
Template Name	LM_LECR_CERT_ISSUE
Processing Type	Batch

Related Links

View Certification Roster Page

Certification Reissue

This topic describes the delivered Certification Reissue workflow notification.

Field or Control	***Description***
Trigger Description	An administrator reissues a certification using a status of Reissue.
Action Description	• Alerts the learner that her or his certification for the program has been reissued. • Provides the learner with the certification name.
Template Name	LM_LECR_CERT_REISSUE
Processing Type	Batch

Related Links

View Certification Roster Page

Certification Revocation

This topic describes the delivered Certification Revocation workflow notification.

Field or Control	***Description***
Trigger Description	An administrator changes the status of a certification to Revoked.
Action Description	• Alerts learner that her or his certification has been revoked. • Provides learner with program name and reason code. • Provides learner with the full name of the administrator who take the action.
Template Name	LM_LECR_CERT_REVOKE
Processing Type	Batch.

Related Links

View Certification Roster Page

Certification Waiver

This topic describes the delivered Certification Waiver workflow notification.

Field or Control	***Description***
Trigger Description	An administrator changes the status of a certification to Waived, or adds new supplemental learning for a certification.
Action Description	• Alerts learner that her or his certification has been waived. • Provides learner with program name.
Template Name	LM_LECR_CERT_WAIVER
Processing Type	Manually processed by administrator using the View Certification Roster page (Enterprise Learning, Learner Tasks, Administer Program Rosters, Administer Program Rosters).

Related Links

View Certification Roster Page

Registration Incomplete

This topic describes the delivered Registration Incomplete workflow notification.

Field or Control	***Description***
Trigger Description	An administrator changes the status of a program to Not Completed or the learner fails to complete the certification prior to the target completion date and the learner is marked Not Completed. In the second case, you must run the Program Status Updates process before the notification can be sent.
Action Description	• Notifies learner that her or his status for the certification is now incomplete because it was not completed by the target completion date. • Provides learner with program name, program code, confirmation number, and registration status. • Directs learners to My Learning page for more details about this certification.
Template Name	LM_REG_INCO
Processing Type	Batch

Related Links

Updating Certification Registration Statuses

Certification Reminder and Warning Workflow Notifications

This topic lists the delivered workflow notifications the system uses to send out automatic program notifications to learners whenever there is a reminder or warning for a certification. Schedule these notifications through the Program Notifications page.

The delivered workflow notifications include:

- Certifications expiration reminder.
- Certifications completion warning.
- Recertifications expiration reminder.
- New program requirement update.

Related Links

Sending Program Notifications

Certifications Expiration Reminder

This topic describes the delivered Certifications Expiration Reminder workflow notification.

Field or Control	***Description***
Trigger Description	The current date is equal to learner's certification expiration date minus the number of days set in Expiration Warning Period field on the Program Details page.
Action Description	• Reminds the learner that a program will soon expire. • Provides the learner with program name, program code, and expiration date. • Directs the learner to the Certification Status page to register for the recertification program.
Template Name	LM_LECR_EXPR_RMNDR
Processing Type	Batch

Related Links

Program Notifications Page

Certifications Completion Warning

This topic describes the delivered Certifications Completion Warning workflow notification.

Field or Control	***Description***
Trigger Description	The current date is equal to learner's target completion date minus the number of days set in Completion Warning Period field on the Program Details page.
Action Description	• Reminds learner of the upcoming deadline for the certification. • Provides learner with program name, program code, and target completion date. • Warns learner that failure to complete all requirements by the due date will result in an incomplete and require a new registration.
Template Name	LM_LECR_COMP_RMNDR
Processing Type	Batch

Related Links

Program Notifications Page

Recertifications Expiration Reminder

This topic describes the delivered Recertifications Expiration Reminder workflow notification.

Field or Control	***Description***
Trigger Description	The current date is equal to learner's recertification date minus the number of days set in Recertification Warning Period field on the Program Details page.
Action Description	• Reminds learner of the upcoming deadline for the recertification. • Provides learner with program name, program code, and recertification deadline. • Warns learner that failure to complete appropriate recertification by the deadline will result in expiration of certification and require full certification again.
Template Name	LM_LECR_RECERT_RMNDR
Processing Type	Batch

Related Links

Program Notifications Page

New Program Requirement Update

This topic describes the delivered New Program Requirement Update workflow notification.

Field or Control	***Description***
Trigger Description	An administrator updates the requirements of a certification and selects the option to update the learner's certification record.
Action Description	• Alerts learner that new program requirements have been added to her or his certification. • Provides learner with program name.
Template Name	LM_LECR_CERT_UPDATE

Field or Control	***Description***
Processing Type	Batch
Process Name	LM_CERT_UPD

Enrollment Workflow Notifications

This topic lists the delivered workflow notifications that the system uses to send out automatic enrollment notifications to learners whenever there is a relevant enrollment status change for a class enrollment. With the exception of the Waitlist Threshold Met Notification, which is generated through the Run Waitlist Notification page, the enrollment notifications listed here are generated through the Enrollment Notifications page.

The delivered workflow notifications include:

- Enrollment pending approval.
- Pending approval to manager or owner.
- Approver not found.
- Class pending approval dropped.
- Enrollment pending payment.
- Enrollment waitlisted.
- Insufficient balance.
- Enrollment confirmation.
- Class completion.
- Class incomplete.
- Class cancellation.
- Class cancellation - instructor.
- Supplemental learning complete.
- Supplemental learning denied.
- Supplemental learning pending approval.
- Supplemental learning denied - learner.
- Supplemental learning dropped.
- Class enrollment denied

- Enrollment dropped.
- Waitlist threshold met.

Enrollment Pending Approval

This topic describes the delivered Enrollment Pending Approval workflow notification.

Field or Control	***Description***
Trigger Description	Learner enrolls in a class or a manager or administrator enrolls a learner in a class that requires manager or administrator approval, and someone other than the required approver does the enrollment.
Action Description	• Alerts the learner that enrollment in the class is pending approval. • Provides the learner with the class name, class code, delivery method type, start and end dates, confirmation number, and enrollment status. • Directs the learner to the My Learning page for more details.
Template Name	LM_ENRLMT_PDAPPRV_ILT
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page
Process Mass Enrollment Page

Pending Approval to Manager or Owner

This topic describes the delivered Pending Approval to Manager or Owner workflow notification.

Field or Control	***Description***
Trigger Description	• Learner enrolls in a class, or an administrator enrolls a learner in a class, and the class requires manager approval. • Learner enrolls in a class, or a manager or administrator enrolls a learner in a class, training units or purchase order is used as the payment method, the class requires payment approval, and the training unit pool or purchase order has an owner assigned.

Field or Control	***Description***
Action Description	• Alerts the manager, training unit pool owner, or purchase order owner that she or he must approve this enrollment request. • Provides the manager, training unit pool owner, or purchase order owner with the learner's name, class name, class code, delivery method type, start and end dates, confirmation number, and enrollment status. • Directs the manager to the Maintain Approvals page to approve or decline the enrollment request.
Template Name	LM_PDAPPRV_MGR_ILT
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page
Process Mass Enrollment Page

Approver Not Found

This topic describes the delivered Approver Not Found workflow notification.

Field or Control	***Description***
Trigger Description	An approval is required, but no approver is found.
Action Description	Alerts the Approval Administrator to the required approval.
Template Name	LM_APPRV_MSNG
Processing Type	Batch

Class Pending Approval Dropped

This topic describes the delivered Class Pending Approval Dropped workflow notification.

Field or Control	***Description***
Trigger Description	The status of a class enrollment changes from pending approval to dropped.

Field or Control	***Description***
Action Description	Alerts the approver responsible for approving or denying the enrollment that the class was dropped.
Template Name	LM_ENRLMT_DPDNED_MGR
Processing Type	Batch

Enrollment Pending Payment

This topic describes the delivered Enrollment Pending Payment workflow notification.

Field or Control	***Description***
Trigger Description	Learner enrolls in a class, or a manager or administrator enrolls a learner in a class, and cash or check is used as the payment method during enrollment.
Action Description	• Alerts the learner that enrollment in the class is pending payment. • Provides the learner with the class name, class code, confirmation number, and enrollment status. • Directs the learner to the My Learning page for more details.
Template Name	LM_ENR_PEPA_LRNR
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page
Process Mass Enrollment Page

Enrollment Waitlisted

This topic describes the delivered Enrollment Waitlisted workflow notification.

Field or Control	***Description***
Trigger Description	• Learner enrolls in a class, or a manager or administrator enrolls a learner in a class, and the learner is added to the class waitlist because the class is full. • Manager, administrator, training unit pool owner, or purchase order owner approves a learners enrollment request for a class, and the learner is added to the class waitlist because the class is full.
Action Description	• Alerts the learner that she or he has been added to the waitlist. • Provides the learner with the class name, class code, delivery method type, start and end dates, confirmation number, enrollment status, waitlist priority number, and last drop date. • Directs the learner to the My Learning page for more details.
Template Name	LM_ENRLMT_WTLIST_ILT
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page
Process Mass Enrollment Page
Class Roster Page
Maintain Approvals Page

Insufficient Balance

This topic describes the delivered Insufficient Balance workflow notification.

Field or Control	***Description***
Trigger Description	A seat opens up in a class and the system attempts to enroll a waitlisted learner, but there are insufficient funds in the training unit pool or purchase order. The learner remains waitlisted.
Action Description	• Alerts the learner that enrollment in the class failed due to insufficient funds in the training unit pool or purchase order. • Provides the learner with the class code and class title.

Field or Control	***Description***
Template Name	LM_ENR_INSUF_BAL
Processing Type	Batch

Related Links

Class Roster Page
(FRA) Learner Roster Page

Enrollment Confirmation

This topic describes the delivered Enrollment Confirmation workflow notification.

Field or Control	***Description***
Trigger Description	• Learner enrolls in a class, or a manager or administrator enrolls a learner in a class, and the learner's enrollment status is enrolled. • Manager, administrator, training unit pool owner, or purchase order owner approves a learners enrollment request for a class. • System enrolls a waitlisted learner or an administrator manually enrolls a waitlisted learner.
Action Description	• Confirms the learner's class enrollment. • Provides the learner with the class name, class code, delivery method type, start and end dates, confirmation number, enrollment status, and last drop date. If one-step launch and enroll is enabled for the delivery method type, this notification provides the learner with a link to launch the class. • Directs the learner to the My Learning page for more details.
Template Name	LM_ENRLMT_CONF_ILT
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page
Process Mass Enrollment Page
Class Roster Page
Maintain Approvals Page

Class Completion

This topic describes the delivered Class Completion workflow notification.

Field or Control	***Description***
Trigger Description	Learner completes a class.
Action Description	• Confirms the learner's completion of the class. • Provides the learner with the class name, class code, delivery method type, start and end dates, confirmation number, enrollment status, and completion date. • Directs the learner to the My Learning page for more details.
Template Name	LM_ENRLMT_CMPL_ILT
Processing Type	Batch

Class Incomplete

This topic describes the delivered Class Incomplete workflow notification.

Field or Control	***Description***
Trigger Description	Learner fails to complete the class within the allotted time-frame.
Action Description	• Alerts the learner that she or he did not complete the class. • Provides the learner with the class name, class code, delivery method type, start and end dates, confirmation number, and enrollment status. • Directs the learner to the My Learning page for more details.
Template Name	LM_ENRLMT_INCO_ILT
Processing Type	Batch

Class Cancellation

This topic describes the delivered Class Cancellation workflow notification.

Field or Control	***Description***
Trigger Description	A class is cancelled.
Action Description	• Alerts the learner that his or her enrollment is dropped because the class is cancelled. • Provides the learner with the class name, class code, delivery method type, start and end dates, confirmation number, and enrollment status.
Template Name	LM_ENRLMT_CNCLED_ILT
Processing Type	Batch

Related Links

Defining Class Details

Class Cancellation - Instructor

This topic describes the delivered Class Cancellation - Instructor workflow notification.

Field or Control	***Description***
Trigger Description	A class is cancelled.
Action Description	• Alerts the instructor that the class is cancelled. • Provides the instructor with the class name, class code, delivery method type, and start and end dates.
Template Name	LM_ACT_INST_CNCLED
Processing Type	Batch

Supplemental Learning Complete

This topic describes the delivered Ad Hoc Learning Complete workflow notification.

Field or Control	***Description***
Trigger Description	Learner completes supplemental learning.

Field or Control	**Description**
Action Description	• Confirms the learner's completion of the supplemental learning. • Provides the learner with the supplemental learning name and type, the start date, and the end date. • Lists the classes, programs, and objectives for which the learner has been waived.
Template Name	LM_ADHC_COMPL
Processing Type	Batch

Supplemental Learning Denied

This topic describes the delivered Supplemental Learning Denied workflow notification.

Field or Control	**Description**
Trigger Description	One of the approvers denies a request to receive credit for supplemental learning.
Action Description	• Alerts the learner that the supplemental learning is denied. • Provides the learner with the supplemental learning name and type, the start date, and the end date.
Template Name	LM_ADHC_DENIED
Processing Type	Batch

Related Links

Defining Class Details

Supplemental Learning Pending Approval

This topic describes the delivered Ad Hoc Learning Pending Approval workflow notification.

Field or Control	**Description**
Trigger Description	Learner enrolls in supplemental learning or a manager or administrator enrolls a learner in supplemental learning that requires manager or administrator approval, and someone other than the required approver does the enrollment.

Field or Control	***Description***
Action Description	• Alerts the approver that enrollment in the supplemental is pending approval. • Provides the approver with the learner, the supplemental learning name and type, and a link to approve or deny the request.
Template Name	LM_ADHC_PDAPPRV
Processing Type	Batch

Supplemental Learning Dropped

This topic describes the delivered Supplemental Learning Dropped workflow notification.

Field or Control	***Description***
Trigger Description	A manager or administrator changes the status of supplemental learning to dropped.
Action Description	Alerts the learner that his or her supplemental learning has been dropped.
Template Name	LM_SUPP_DPD
Processing Type	Batch

Class Enrollment Denied

This topic describes the delivered Class Enrollment Denied workflow notification.

Field or Control	***Description***
Trigger Description	One of the approvers denies a class enrollment.
Action Description	• Alerts the learner that the class enrollment that she or he requested is denied. • Provides the learner with the class name, class code, delivery method, the start date, and the end date.
Template Name	LM_ENRLMT_DENIED

Field or Control	***Description***
Processing Type	Batch

Related Links

Defining Class Details

Enrollment Dropped

This topic describes the delivered Enrollment Dropped workflow notification.

Field or Control	***Description***
Trigger Description	• Learner drops a class, or a manager or administrator drops a learner's enrollment in a class. • Manager, administrator, training unit pool owner, or purchase order owner denies an enrollment request from a learner.
Action Description	• Alerts the learner that she or he is dropped from the class. • Provides the learner with the class name, class code, delivery method type, start and end dates, confirmation number, and enrollment status.
Template Name	LM_ENRLMT_DPDNED_ILT
Processing Type	Batch

Related Links

Enroll Learners - Payment Details Page
Process Mass Enrollment Page
Class Roster Page
Maintain Approvals Page

Waitlist Threshold Met Notification

This topic describes the waitlist threshold met notification.

Field or Control	***Description***
Trigger Description	The threshold number for waitlisted learners for a class is met.

Field or Control	Description
Action Description	• Alerts the administrator of the class's primary learning environment that the threshold number for waitlisted learners for a class has been exceeded. • Provides the administrator with the class title and code, and a link to the roster.
Template Name	LM_WAIT_THRESHOLD
Processing Type	Batch

Mass Enrollment Workflow Notifications

This topic lists the delivered workflow notifications that the system uses to send out automatic notifications to learners and requesters whenever you select the corresponding notification options during mass enrollment. The delivered workflow notifications include:

- Learner unsuccessful enrollment in class.
- Learner unsuccessful registration in program.
- Mass enrollment class results to requester.
- Mass enrollment program results to requester.

Learner Unsuccessful Enrollment in Class

This topic describes the delivered Learner Unsuccessful Enrollment in Class workflow notification.

Field or Control	Description
Trigger Description	Administrator processes a mass enrollment request, and the **Notify Learner** option was selected on the Enroll Learners - Mass Enrollment page during mass enrollment.
Action Description	• Alerts the learner that his or her enrollment in the class was unsuccessful. • Provides the learner with the class name, class type, start and end dates, and the location, city, and state in which the class is to take place. • Lists the reason enrollment in the class was unsuccessful.
Template Name	LM_LRNR_UNSUCC_ACTIVITY

Field or Control	***Description***
Processing Type	Batch

Related Links

Enroll Learners - Mass Enrollment Page

Learner Unsuccessful Registration in Program

This topic describes the delivered Learner Unsuccessful Registration in Program workflow notification.

Field or Control	***Description***
Trigger Description	Administrator processes a mass enrollment request, and the **Notify Learner** option was selected on the Enroll Learners - Mass Enrollment page during mass enrollment.
Action Description	• Alerts the learner that their registration in the program was unsuccessful. • Provides the learner with the program name, program type, and program code. • Lists the reason that registration was unsuccessful.
Template Name	LM_LRNR_UNSUCC_PROGRAM
Processing Type	Batch

Related Links

Enroll Learners - Mass Enrollment Page

Mass Enrollment Class Results to Requester

This topic describes the delivered Mass Enrollment Class Results to Requester workflow notification.

Field or Control	***Description***
Trigger Description	Administrator processes a mass enrollment request, and the **Notify Requester** option was selected on the Enroll Learners - Mass Enrollment page during mass enrollment.

Field or Control	***Description***
Action Description	• Alerts the requester that the mass enrollment request has been processed. • Provides the requester with the class name, class type, start and end dates, and the facility, city, and state in which the class is to take place. • Lists the total number of successful and unsuccessful enrollments in the class.
Template Name	LM_MASS_RQSTR
Processing Type	Batch

Related Links

Enroll Learners - Mass Enrollment Page

Mass Enrollment Program Results to Requester

This topic describes the delivered Mass Enrollment Program Results to Requester workflow notification.

Field or Control	***Description***
Trigger Description	Administrator processes a mass enrollment request, and the **Notify Requester** option was selected on the Enroll Learners - Mass Enrollment page during mass enrollment.
Action Description	• Alerts the requester that the mass enrollment request has been processed. • Provides the requester with the program name, program type, and program code. • Lists the total number of successful and unsuccessful registrations in the program.
Template Name	LM_MASS_RQSTR_PROGRAMS
Processing Type	Batch

Related Links

Enroll Learners - Mass Enrollment Page

Learning Request Notifications

This topic lists the delivered workflow notifications that the system uses to send out notifications to learners and requesters to indicate the status of a learning request. The delivered workflow notifications include:

- Class already exists.
- New class offered.
- No class will be offered.
- Threshold Met Notification.

Related Links

Generating Notifications for Learning Requests

Class Already Exists

This topic describes the delivered Learning Request Class Already Exists workflow notification.

Field or Control	***Description***
Trigger Description	Administrator selects Send Notifications - Exists as the **Group Action** on the Administer Learning Requests page.
Action Description	• Alerts the requester that the learning request will be fulfilled with an existing class. • Provides the requester with the class name, class code, and delivery method, and links to enroll in the class or remove the learning request from the Learning Home page.
Template Name	LM_LRQ_EXISTACT
Processing Type	Batch.

New Class Offered

This topic describes the delivered Learning Request New Class Offered workflow notification.

Field or Control	***Description***
Trigger Description	Administrator selects Send Notifications - New Offered as the **Group Action** on the Administer Learning Requests page.

Field or Control	*Description*
Action Description	• Alerts the requester that the learning request will be fulfilled with a new class. • Provides the requester with the class name, class code, and delivery method, and links to enroll in the class or remove the learning request from the Learning Home page.
Template Name	LM_LRQ_NEWACT
Processing Type	Batch.

No Class Will Be Offered

This topic describes the delivered Learning Request No Class Will Be Offered workflow notification.

Field or Control	*Description*
Trigger Description	*Send Notifications — Declined* is selected as the **Group Action** on the Administer Learning Requests page.
Action Description	• Alerts the requester that the requested class will not be offered. • Provides the requester with the class name and a link to remove the learning request from the Learning Home page.
Template Name	LM_LRQ_NOACT
Processing Type	Batch.

Threshold Met Notification

This topic describes the delivered Learning Request Threshold Met workflow notification.

Field or Control	*Description*
Trigger Description	The threshold number of seats for a specific course have been requested.

Field or Control	***Description***
Action Description	• Alerts the administrator of the class's primary learning environment that the threshold has been met for the specified course. • Provides the requester with the number of seats, the course name, and a link to the Administer Learning Request page.
Template Name	LM_LRQ_THRESHOLD_MET
Processing Type	Batch

DIF Request Notifications

This topic lists the delivered workflow notifications that the system uses to send out notifications to DIF request approvers to indicate that the status of a DIF request is still pending. Use the DIF Request Notifications page to generate the DIF request workflow notifications.

Pending DIF Approval Reminder

This topic describes the delivered Pending DIF Approval Reminder workflow notification.

Field or Control	***Description***
Trigger Description	One or more DIF requests has a status of pending after the specified number of DIF Request Reminder Days.
Action Description	Alerts the approver assigned to the DIF request that the status of the request is pending.
Template Name	LM_PDAPPRV_DIF
Processing Type	Batch

Attachment Location Uniform Resource Locators (URLs)

You can modify URL definitions through the portal navigation **PeopleTools** > **Utilities** > **Administration** > **URLs.** This table shows the URLs that are included in Enterprise Learning Management that you can use to control the storage location of specific types of attachments:

URL Name	***Description***	***Default Storage Location***
FILEDB	Controls the storage location of course attachments.	record://PSFILE_ATTDET
LM_ACT_ATCH	Controls the storage location of class attachments.	record://PS_FILE_ATTDET
LM_CI_ATCH	Controls the storage location of course attachments.	record://PS_FILE_ATTDET
LM_EQP_ATCH	Controls the storage location of equipment attachments.	record://PS_FILE_ATTDET
LM_FCLTY_ATCH	Controls the storage location of facility attachments.	record://PS_FILE_ATTDET
LM_NOTIF_ADHOC_ATT	Controls the storage location of ad hoc notification attachments.	record://PSFILE_ATTDET
LM_ROOM_ATCH	Controls the storage location of room attachments.	record://PS_FILE_ATTDET
LM_INSTR_ATCH	Controls the storage location of instructor attachments.	record://PS_FILE_ATTDET
LM_LT_FILE_ATTACH	Controls the storage location of launch and track course structure file attachments.	record://LM_LEL_FILES

Note: Your system configuration determines the size of the files that you can attach to classes, equipment, facilities, rooms, instructors, and courses.
See the product documentation for *PeopleTools: Application Designer Developer's Guide*.

Chapter 40

Understanding Enterprise Learning Management Security

Understanding Roles and Permission Lists

You control access to Enterprise Learning Management pages, menus, and processes through the use of roles and permission lists. Permission lists also control the types of updates a user can make to a learner's enrollment or registration status, such as dropping learners, approving enrollments, and updating a learner's certification status. For example, permission list LMLELM7090 permits users to revoke a learner's certification status.

PeopleSoft delivers 17 predefined roles created with PeopleTools functionality, including internal learner, external learner, instructor, learning catalog administrator, and enrollment administrator. A user can have multiple roles; the privileges available to the user are cumulative. You can reconfigure the delivered roles onsite, making it possible for you to implement practically any security model for your business environment.

In addition to using roles and permission lists to define system access, you use learning environments and learner groups to control access to the catalog, classes, and programs.

See Catalog Hierarchy.

Note: The following roles pertain exclusively to Enterprise Learning Management and are not to be confused with similarly named roles that are delivered with PeopleSoft Catalog Management.

The delivered roles are as follows:

- LMLELM ELM User
- LMLELM Enrollment Admin.
- LMLELM External Learner
- LMLELM External Learning Admin
- LMLELM French Enh
- LMLELM Instructor
- LMLELM Instructor Manager
- LMLELM Internal Learner
- LMLELM Learning Admin.
- LMLELM Learning Catalog Admin.

- LMLELM Learning Env Admin.
- LMLELM Learning Finance Admin.
- LMLELM Learning Resource Admin.
- LMLELM Manager
- LMLELM Profile Administrator
- LMLELM Roster Administrator
- LMLELM Technical Administrator

Renaming Roles and Permission Lists Using Security Codes

Page Used to Rename Roles and Permission Lists Using Security Codes

Page Name	***Definition Name***	***Usage***
Security Group Page	LM_SEC_GRP	Add updated names for roles and permission lists

Understanding Security Groups

Oracle delivers the following security groups:

Security Group	***Description***	***Role/Permission List***	***Value***
1	Roster Administrator	Role	LMLELM_Roster_ Administrator
2	Instructor	Role	LMLELM_Instructor
3	Enrollment Admin	Role	LMLELM_Enrollment_ Admin
4	Administrator Pagelets	Permission List	LMLELM1350
5	Instructor Preferences	Permission List	LMLELM3300
6	Program Approve	Permission List	LMLELM7010
7	Program Complete	Permission List	LMLELM7020

Security Group	***Description***	***Role/Permission List***	***Value***
8	Program Decline	Permission List	LMLELM7030
9	Program Drop	Permission List	LMLELM7040
10	Program Expire	Permission List	LMLELM7050
11	Program Not Complete	Permission List	LMLELM7060
12	Program Registered	Permission List	LMLELM7070
13	Program Reissue	Permission List	LMLELM7080
14	Program Revoke	Permission List	LMLELM7090
15	Program Waive	Permission List	LMLELM7100
16	Program Warning	Permission List	LMLELM7110
17	Activity Enroll	Permission List	LMLELM7200
18	Activity Approve	Permission List	LMLELM7210
19	Activity to Learning Request	Permission List	LMLELM7240
20	Activity to New Activity	Permission List	LMLELM7250
21	Activity Drop	Permission List	LMLELM7260
22	Learning Administrator	Role	LMLELM_Learning_Admin

ELM PeopleCode uses the roles and permission lists included in these delivered security roles to determine whether tasks such as enrollment drops or program recertifications are allowed. The PeopleCode references the security codes rather than the roles and permission lists themselves. This is so that when you rename one of these roles or permission lists, you do not have to search for every reference to the role or permission list and replace it with the new name. Instead, you simply add the new name to the associated security code.

For example, if you renamed the LMLELM_Enrollment_Admin role CompInitial_Enrollment_Admin, you would:

1. Access the Security Group Page for security group 3 (Enrollment Admin), which is associated with the LMLELM_Enrollment_Admin role.

2. Add a row for the new role name, CompInitial_Enrollment_Admin.

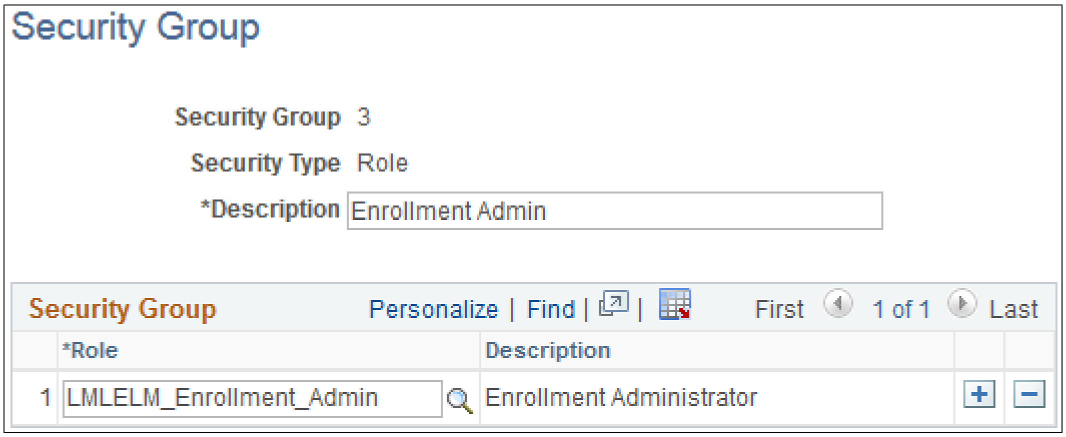
Security Group Page

Use the Security Group page (LM_SEC_GRP) to add updated names for roles and permission lists.

Navigation:

Set Up ELM > **Security Group**

This example illustrates the fields and controls on the Security Group page.



Field or Control	***Description***
Role	Enter the role that you want to associate with the security group.

Chapter 41

Third Party Images Provided with Sample Data

Using Third Party Images Provided with Sample Data

The PeopleSoft ELM demo database includes sample images that are provided under a restricted use license for demonstration purposes only, such as product demonstrations and conference room pilots. The specific images are listed below. If you want to use these sample images in a production environment, you must contact the image owners directly to purchase the images. You can find contact information for the owners in the Licensing Notes for Oracle's PeopleSoft Enterprise Learning Management (ELM) 9.2 document on My Oracle Support.

Oracle does not provide a license for you to use the sample images in your production environments or for other non-demonstration uses.

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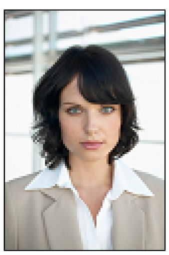
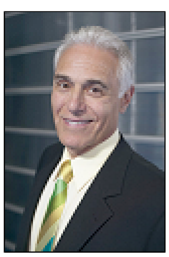
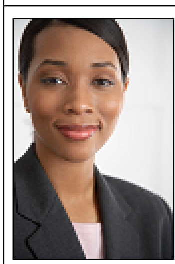
	Corbis	42-15837270
	Corbis	42-15909321
	Corbis	42-16540035

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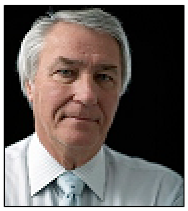	Corbis	42-16587757
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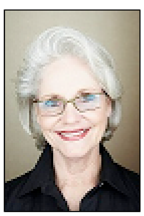	Corbis	42-16730446
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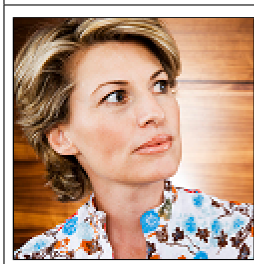	Corbis	42-17109039

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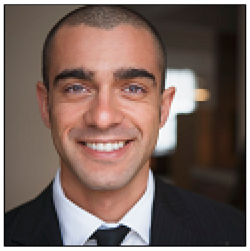
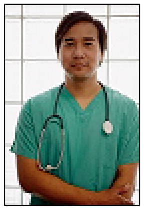
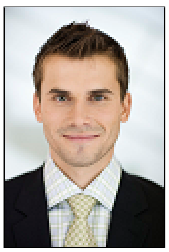
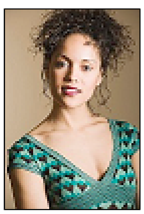
	Corbis	42-17323377
	Corbis	42-17378619
	Corbis	42-17580047
	Corbis	42-17761614
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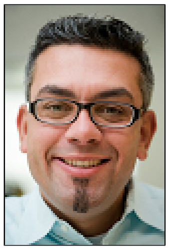
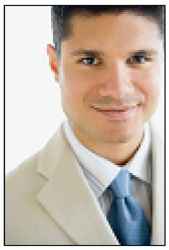
	Corbis	42-18326569
	Corbis	42-19506591
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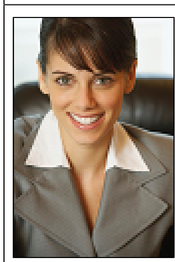
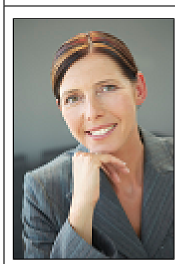
	Corbis	42-19714687
	Corbis	42-19719862

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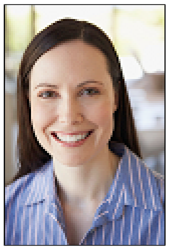	Corbis	42-19745360
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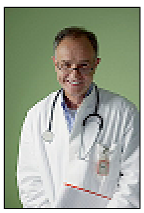
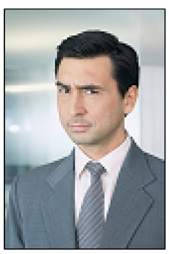
	Corbis	42-19951608
	Corbis	42-20065440
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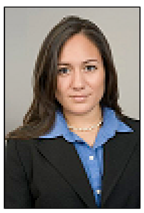	Corbis	42-21853967
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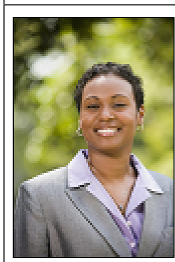	Corbis	42-22430646

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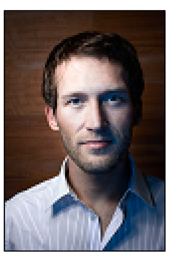	Corbis	42-22940690
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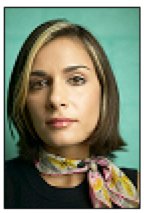	Corbis	42-23069644
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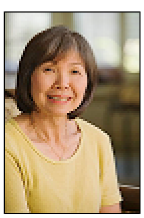
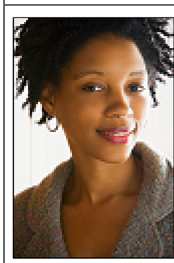
	Corbis	42-23086138
	Corbis	42-23086157

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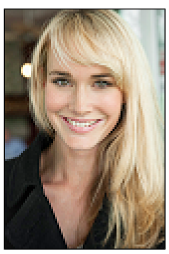	Corbis	42-23837212
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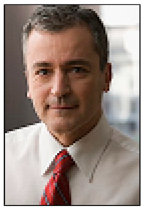	Corbis	42-25460622
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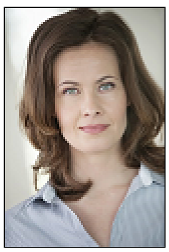
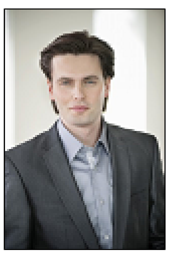
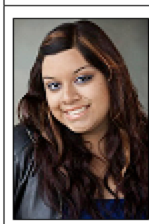
	Corbis	42-25844996
	Corbis	42-25846155
	Corbis	42-26000040
	Corbis	42-26113364

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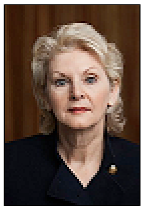
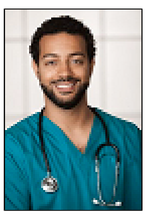
	Corbis	42-27894293
	Corbis	42-29578554
	Corbis	42-30300465
	Corbis	42-30300479
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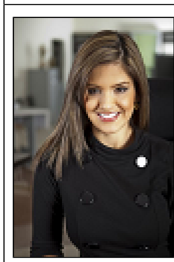
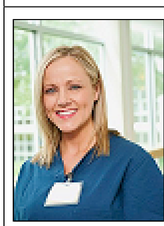
	Corbis	42-30531293
	Corbis	42-30894913

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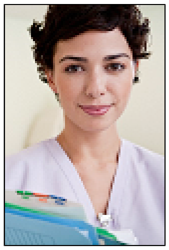	Corbis	42-31802711
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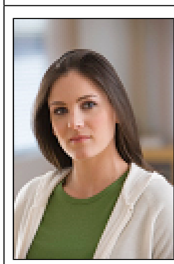	Corbis	42-33085161

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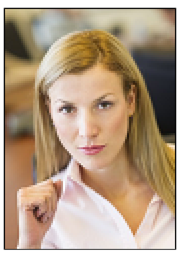
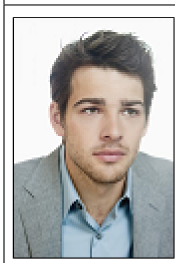
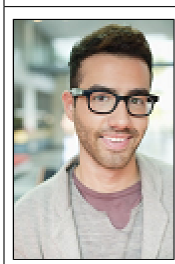
	Corbis	42-34880353
	Corbis	42-35908297
	Corbis	42-35908315
	Corbis	42-35908324

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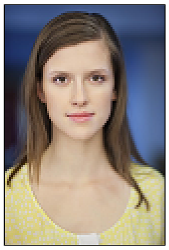
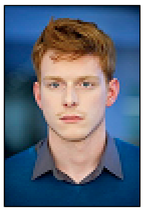
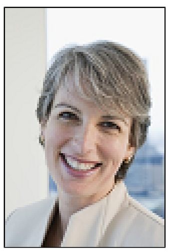
	Corbis	42-35908337
	Corbis	42-35908343
	Corbis	42-36105176
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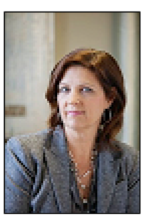
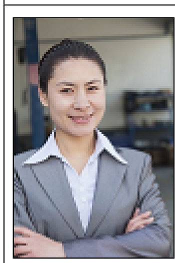
	Corbis	42-41358010
	Corbis	42-42982065

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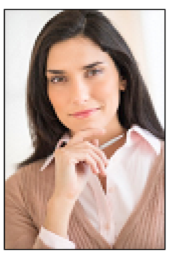
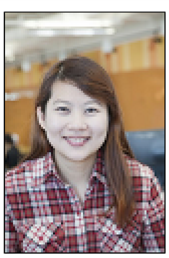
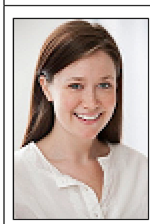
	Corbis	42-46380915
	Corbis	42-46415347
	Corbis	42-46415383

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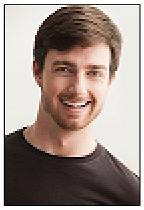	Corbis	42-46415420
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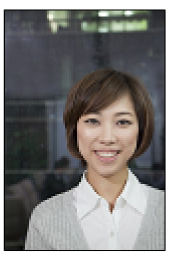
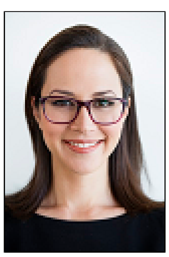
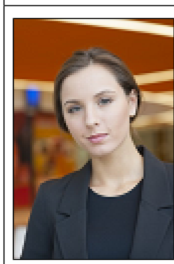
	Corbis	42-46703433
	Corbis	42-47561281
	Corbis	42-48516807

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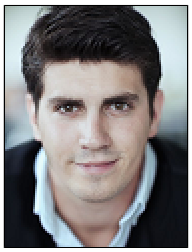	Corbis	42-52972097
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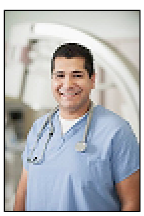
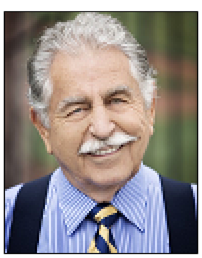
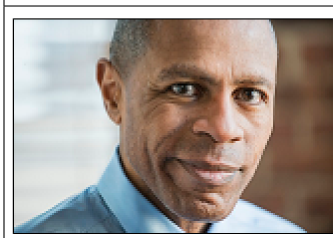
	Corbis	42-56457867
	Corbis	42-56874130
	Corbis	42-58283545

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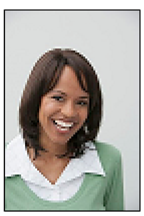
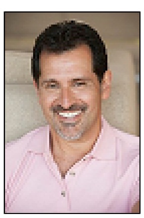
	Corbis	42-58751108
	Corbis	42-59953365
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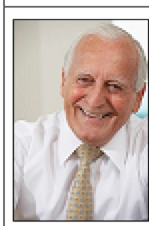	Corbis	42-61567500

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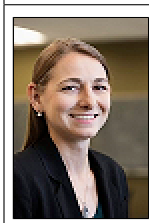
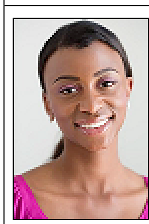
	Corbis	42-67005600
	Corbis	42-67260525

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	Corbis	42-69374895
	Corbis	42-71219811

Chapter 42

Helpful Hints

Sending Data from AICC-Compliant Content

This topic provides recommended solutions to one of the more common issues encountered by PeopleSoft Enterprise Learning Management (ELM) customers.

Note: Do not construe the information provided here as consulting or implementation advice for your specific industry or your individual organization. You should adapt or disregard this information based on the needs of your organization. Oracle does not guarantee that the information included here will work as intended within your customized environment.

Some customers have had issues with AICC-compliant content that does not send data correctly to ELM. If you encounter similar issues, first check with your content vendor to see what kind of logging functionality that it provides. Some content vendors include logging utilities with their content that will capture AICC transactions. A number of vendors use Java for communication with learning management systems. Using Java Console in the browser may reveal the AICC data that is being passed. If no logging utility is available and the Java Console does not reveal the AICC data, you can add the following code to ELM to output statuses and scores into a flat file.

For AICC, open record WEBLIB_LM_ELM, field LM_ISCRIPT, FieldFormula PeopleCode event and add the following (there are two distinct places where you must place this code):

```
/**
*IScript which will be called for AICC-HACP communication
*/
Function IScript_HACP_COMM()
   <****Testing code *****/*
   &sep = Char(13) | Char(10);
   Local string &s = "error=0" | &sep | "version=1.2" | &sep | "aicc_data=[core]" |⇒

 &sep | "student_ID=aicc-user01" | &sep | "student_name=PS,TB" | &sep | "Output_fil⇒

e=" | &sep | "credit=C" | &sep | "lesson_location=" | &sep | "lesson_mode=sequentia⇒

l" | &sep | "lesson_status=Not Attempted" | &sep | "path=" | &sep | "score=" | &sep⇒

 | "time=00:23:15";

   %Response.SetContentType("text/plain");
   %Response.WriteLine(&s);
   Return;
    /*****End of Testing code **************/*>

   /******New Code For Capture**********/
   Local File &DummyFile = GetFile("c:\\temp\\output.txt", "A", %FilePath_Absolute)⇒

;
   &DateTime = %Datetime;
   &DummyFile.WriteLine(&DateTime);
   &DummyFile.WriteLine("-----------Begin Request Param List----------");
   &parameter_array = %Request.GetParameterNames();
   For &i = 1 To &parameter_array.len
```

```
        &parameter_name = &parameter_array [&i];
        &parameter_value = %Request.GetParameter(&parameter_name);
        &DummyFile.WriteLine(&parameter_name | " = " | &parameter_value);
     End-For;
     &DummyFile.WriteLine("-----------End Request Param List------------");


     /*Get the command , session id and the AICC_Data from the input and pass it for ⇒

  processing */
     Local string &str_Command = %Request.GetParameter("command");
     Local string &str_SessionId = %Request.GetParameter("session_id");
     Local string &str_AiccData = Unencode(%Request.GetParameter("AICC_Data"));

     /*Extract the Enrollment Id , LC id and the AU Id */
     Local LEM_UTILITIES:Utility &hacpCommUtil = create LEM_UTILITIES:Utility();
     Local array of string &ar_SplitArr = &hacpCommUtil.SplitString(&str_SessionId, "⇒

  :", 0, 0);
     Local number &nbr_EnrollmentId;
     Local number &nbr_LCId;
     Local string &str_AUId;
     If (&ar_SplitArr.Len <> 3) Then
        &nbr_EnrollmentId = &hacpCommUtil.TEST_ENROLLMENT_ID;
        &nbr_LCId = 1;
        &str_AUId = "1";
     Else
        &nbr_EnrollmentId = Value(&ar_SplitArr [1]);
        &nbr_LCId = Value(&ar_SplitArr [2]);
        &str_AUId = &ar_SplitArr [3];
     End-If;
     Local LEM_COMM:CommHandler &aiccObj = create LEM_COMM:CommHandler(&hacpCommUtil,⇒

   &hacpCommUtil.AHACP, &nbr_EnrollmentId, &nbr_LCId, &str_AUId);
     Local LEM_UTILITIES:StringHashtable &hsh_TrackHash = Null;
     Local string &str_HACPResponse = "";
     /*Depending on the command, call the appropriate methods */
     Evaluate Upper(&str_Command)
     When "GETPARAM"
        /*For query, get the Tracking data for the given SCO and enrollment id */
        &hsh_TrackHash = &aiccObj.GetTrackingData();
        /*If no tracking data was found, return a 'invalid sessionid error */
        If (&hsh_TrackHash = Null) Then
           &str_HACPResponse = &aiccObj.FormHACPResponse("3", "");
        Else
           /*Form the Response String */
           &str_HACPResponse = &aiccObj.FormHACPResponse("0", &aiccObj.FormAiccData(&⇒

  hsh_TrackHash));
        End-If;
        Break;

     When "PUTPARAM"
        /*For update, Update the existing tracking data for the given SCO and enrollm⇒

  ent id and write out
             errorcode of 0
            */
        If (&nbr_EnrollmentId <> &hacpCommUtil.TEST_ENROLLMENT_ID) Then
           /*Populate a hashtable with the new data */
           Local LEM_UTILITIES:StringHashtable &hsh_NewTrackHash = &aiccObj.ParseAicc⇒

  Data(&str_AiccData);
           If (&hsh_NewTrackHash <> Null) Then
              /*Calculate total time and populate that value also */
              &hsh_TrackHash = &aiccObj.GetTrackingData();
              Local string &str_TotalTime;
              try
                 &str_TotalTime = &hacpCommUtil.AddTime(&hsh_NewTrackHash.Get("cmi.co⇒
```



```
re.session_time"), &hsh_TrackHash.Get("cmi.core.total_time"));
            catch Exception &ex
               &str_TotalTime = &hsh_NewTrackHash.Get("cmi.core.session_time");
            end-try;
            &hsh_NewTrackHash.Put("cmi.core.total_time", &str_TotalTime);
            &hsh_TrackHash = &aiccObj.UpdateTrackingData(&hsh_NewTrackHash);
         End-If;
      End-If;
      /*Form the response string */
      &str_HACPResponse = &aiccObj.FormHACPResponse("0", "");
      Break;

   When "EXITAU"
      Local LEM_DB:DBManager &dbObj = create LEM_DB:DBManager(create LEM_UTILITIES:⇒

Utility());
      Local string &str_ScoId = &str_AUId;
      Local LEM_UTILITIES:Utility &dispMenuUtilObj = create LEM_UTILITIES:Utility()⇒

;
      If &dispMenuUtilObj.LOGOUT Then
         If &dbObj.DidLessonLogOut(&nbr_EnrollmentId, &nbr_LCId, &str_ScoId) Then
            &dbObj.UpdateLessonLogOut(&nbr_EnrollmentId, &nbr_LCId, &str_ScoId);
         End-If;
      End-If;
      /*Form the response string */
      &str_HACPResponse = &aiccObj.FormHACPResponse("0", "");
      Break;

   When-Other /*Invalid command */
      &str_HACPResponse = &aiccObj.FormHACPResponse("1", "");
      Break;

   End-Evaluate;

   /*********New Code for Capture**********/
   &DummyFile.WriteLine("-----------Begin HACP Response---------------");
   &DummyFile.WriteLine(&str_HACPResponse);
   &DummyFile.WriteLine("-----------End HACP Response-----------------");
   &DummyFile.WriteLine("");
   &DummyFile.WriteLine("");
   &DummyFile.WriteLine("");
   &DummyFile.Close();

   %Response.SetContentType("text/plain");
   %Response.Write(&str_HACPResponse);


End-Function;
```

The file output.txt captures statuses and scores that the content passes into the LM_TRACK_STUDNT record. Please note that the system creates this file on the application server machine. You should adjust the path if you are running the application server on UNIX. If this approach works with your content, but you'd like a bit more information coming back, ask your global support center analyst for the extended version of the code.

For Sharable Content Object Reference Model (SCORM) data, you can enable JavaScript pop-ups that give you detailed information about communication between ELM and the content. To enable pop-ups, go to the Application Designer and open HTML object LM_SCORM_API_JS_1. On line 6, set var debug = 5, and save. You do not need to restart the application or web server. You will need to navigate away from the launch page and come back to it and relaunch the content for the pop-ups to begin appearing. Once you complete troubleshooting, set the debug variable back to 0 in the LM_SCORM_API_JS_1 object.

Troubleshooting Tracking Data Issues

This topic provides recommended solutions to one of the more common issues encountered by PeopleSoft Enterprise Learning Management (ELM) customers. It discusses how to resolve issues associated with:

- Separate Communication and ELM servers.
- Separate Communication server and ELM server ports.

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Separate Communication and ELM Servers

Some customers set the Communication Server for L&T option to a server that is separate from the ELM web server. In this situation, you must ensure that tracking information, such as completion status or score, is written to the ELM database.

To ensure that tracking information is written to the ELM database, first, try setting the Communication Server for L&T option to the same server and port as the ELM web server. Once this simple scenario works, set the Communication Server for L&T option to another web server and port that is configured to communicate with the ELM application server.

Note: There is currently a documented issue with using a port number on the second server that's different than the ELM web server number. Until this issue is resolved, set the port numbers on your ELM application server and Communication server to the same value.

Separate Communication Server and ELM Server Ports

Some customers set the Communication Server for L&T option to a different port than the ELM server. One issue that can arise with this configuration is that course tracking data does not make it to the ELM database.

PeopleTools clarified that the behavior observed with the single web server and two WebLogic domains is working as designed. The course tracking data issue has more to do with the way that the Microsoft Internet Explorer browser functions. Because both servers are running on the same machine, the cookies created by the first server are automatically shared with the second server. To prevent this sharing and to enable both course tracking and the ability for learners to log in to the application from an email link, we suggest two options.

Both options provide a way to avoid the sharing of cookies. Both PeopleTools and ELM support teams will fully support either option. Please note that the following options are also applicable to load-balanced environments.

- Option 1: Two physical web servers.
- Option 2: One physical web server running two WebLogic domains on two separate ports.

Option 1 has these advantages:

- Performance
- Redundancy
- Long-term stability (insulation from any possible inconsistencies).

Option 2 requires some network manipulation. You can give your web server machine two domain names in the DNS server in order to differentiate the two URLs from one another. You'll need to add a DNS name for the second web server for port 7003 so that all the URLs for this port will use this new name instead of the original name of the first web server. Adding a new name ensures that the browser will not share cookies, and you will not see the course tracking data issue.

Alternatively, you can recreate the web server running on port 7003 to include the domain name. In other words, instead of http://<web_server_name>:7003, you would use a URL similar to this: http://<web_server_name>.peoplesoft.com:7003. Using this alternative web address should prevent the browser from sharing cookies as well.

The advantage of Option 2: Because Option 2 uses the same web server, it is less expensive than Option 1. The disadvantages of Option 2:

- If the whole web server goes down, both sites go down.
- More configuration effort is involved.
- Potential for volatility exists due to software changes.

Chapter 43

Enterprise Learning Management Reports

PeopleSoft Enterprise Learning Management Reports: A to Z

The table in this topic lists the PeopleSoft Enterprise Learning Management reports, sorted by report ID.

For more information about running these reports, refer to:

- The corresponding topic in this product documentation.
- *PeopleTools: Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft*.
- *PeopleTools: SQR Language Reference for PeopleSoft*

For samples of these reports, see the Report Samples that are published with this online documentation.

Learning Reports

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
LM_CNRPT Class Component Structure	Lists all of the individual lessons (SCOs) contained within a specific SCORM or AICC compliant web-based, test, or survey learning component. This report allows the administrator to confirm that the compliant course content has been loaded with correct list and sequence of lessons.	**Enterprise Learning** > **Learning Reports** > **Class Component Structure** > **Class Component Structure**	LM_LEL_RNCTL_CNTNT
LM_DIF_BAL DIF Balance Report	Lists DIF balances for a configurable subset of employees. (BI Publisher)	**Enterprise Learning** > **Learner Reports** > **DIF Balance Report** > **DIF Balance Report**	LM_RUNCTL_DIF
LM_EDU_ASSMT Educational Assessment	Produces external learner educational assessment data for the Bilan Pédagogique (BI Publisher).	**Enterprise Learning** > **Learning Reports** > **Educational Assessment**	LM_RUNCTL_EDU_ASMT

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
LM_PRGRP Learning Component Progress	Lists all learners enrolled in a class and their completion progress in the class's learning components.	**Enterprise Learning** > **Learning Reports** > **Learning Component Progress** > **Learning Component Progress**	LM_RUN_ACTPROG
LM_RTG_RPT Review Ratings Report	Lists ratings related information for classes and programs based on filter criteria as selected on the run control page (BI Publisher).	**Enterprise Learning** > **Learning Reports** > **Review Rating Report**	LM_RTG_RPT
LM_STATS Class Component Progress	Lists the lesson title, lesson status, and lesson score for each lesson (SCO) completed for each learner within a SCORM or AICC compliant self-paced learning component.	**Enterprise Learning** > **Learning Reports** > **Class Component Progress** > **Class Component Progress**	LM_LEL_RNCTL_STDNT
LM001 Learning Plan Transcript by Organization	Sorted by organization, lists learners' course information, including enrollment status, passing status, and grades. (BI Publisher)	**Enterprise Learning** > **Learning Reports** > **Transcript by Organization** > **Transcript by Organization**	RUNCTL_LM001
LM002 Learning Plan Transcript	Lists complete transcript for all learning completed by one learner. It includes learners' course information, including enrollment status, passing status, and grades. (BI Publisher)	**Enterprise Learning** > **Learning Reports** > **Learner Transcript** > **Learner Transcript**	RUNCTL_LM002
LMCATGRE Learning Component Report	Lists classes and their learning components associated with a single course or all courses within a category.	**Enterprise Learning** > **Learning Reports** > **Class Components** > **Class Components**	RCTL_BLND_ACT_RPT
LMCERTCMP Certificate of Completion	Lists a certificate of completion for a class or program.	Click the Print Certificate Completion icon on the My Learning page.	LM_LEARNING_HM
LMCOMPRT Completion Report - by Organization	Lists the learners within a department or customer organization who have completed a course, and the enrollment status, passing status, and grade for each learner.	**Enterprise Learning** > **Learning Reports** > **Item Completion** > **Item Completion**	RCTL_ENRT_COMP_RPT

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
LMCRTCMP Certification Completions	Lists the learners who have completed a specific certification. The report shows completion date, expiration date and recertification date.	**Enterprise Learning** > **Learning Reports** > **Certification Status** > **Certification Status**	LM_RUNCTL_CRTCMP
LMCURCMP Curriculum Completions	Lists the learners who have completed a specific curriculum.	**Enterprise Learning** > **Learning Reports** > **Curriculum Completions** > **Curriculum Completions**	LM_RUNCTL_CURCMP
LMHSTYRT Learning History by Department (Cost Center)	Lists completed learning for learners within a specific department.	**Enterprise Learning** > **Learning Reports** > **History by Department** > **History by Department**	RCTL_ENRT_HSTY_RPT
LMMASSDT Mass Enrollment Status Report	Lists the results of a processed mass enrollment request, including successful and unsuccessful enrollments and registrations. (BI Publisher)	• **Enterprise Learning** > **Mass Enrollments** > **Review Mass Enrollment Request** > **Mass Enrollment Requests** • Click the **All** or **Error** buttons on the Review Mass Enrollment Requests.	LM_MASS_RQST_DET
LMPRGREG Program Roster	Lists all the learners registered for a specific program. You can run the report for a curriculum or a certification within a specified date range. The report shows learner's name, organizations, registration status and date completed (if the status is Completed). (BI Publisher)	**Enterprise Learning** > **Learning Reports** > **Program Roster** > **Program Roster**	LM_RUNCTL_PRGREG
LMPRQRPT Prerequisite Report - by Class	Lists the status of prerequisites for each learner within a class. This report helps the instructor determine which learners have completed prerequisites for a given class.	**Enterprise Learning** > **Learning Reports** > **Prerequisite Status** > **Prerequisite Status**, ,	LM_RUN_PRQ_RPT

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
LMROSTRT Class Roster	Lists all learners enrolled for a class. You can run the report by course, class code, enrollment status and class date range.	**Enterprise Learning** > **Learning Reports** > **Class Roster** > **Class Roster**	RCTL_ENRT_ROST_RPT
LMTRANRT Class Transcripts - Grades	Lists the enrollment status, passing status, and grade for all learners within a class.	**Enterprise Learning** > **Learning Reports** > **Class Transcripts** > **Class Transcripts**	RCTL_ENRT_TRNS_RPT
LMREGAUD Compliance Report	Lists manual changes made to learners' program registration status. For a selected program, lists the learner's name, the new status, the date of the status change, and name of the user who updated the status.	**Enterprise Learning** > **Learning Reports** > **Certification Compliance** > **Certification Compliance**	LM_RUNCTL_REGAUD
LMSURVEY Survey Report	Lists detailed survey results in PDF format.	• **Enterprise Learning** > **Learning Reports** > **Survey Report** • Click the Survey Report link in the Survey Results pagelet in the Learning Home.	LM_SURVEY_PG
LMTPOBJV Training Plan Report	Lists the demand for training for a selected company or learning environment. Lists the enrollment records by class, including the learner's name, company, enrollment date, and other data. For learning requests, lists the number of seats requested. Report data is sorted by global objective.	**Enterprise Learning** > **Learning Reports** > **Training Plan** > **Training Plan**	LM_TRNG_PLAN_RCTL
LMTPLNBG Training Report - Budget	Provides the same information as the Training Plan Report, but sorted by department. Also compares training budgets by department to forecasted costs.	**Enterprise Learning** > **Learning Reports** > **Training Plan** > **Training Plan**	LM_TRNG_PLAN_RCTL

Related Links

Understanding Training Plans

Financial Reports

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
LMBO001 General Ledger Detail	Lists the transactions written to the general ledger for each subledger group.	**Enterprise Learning** > **Financial Reports** > **General Ledger Detail** > **General Ledger Detail Report**	LM_RUNCTL_LMBO001
LMBO002 Payment Update	Lists the transactions in which payment information has been modified since they were posted to the subledger or exported to the general ledger.	**Enterprise Learning** > **Financial Reports** > **Payment Updates** > **Payment Update Report**	LM_RUNCTL_LMBO002
LMBO003 External Payment	Lists the cash, check, and charge transactions for each customer organization.	**Enterprise Learning** > **Financial Reports** > **External Payment** > **External Payment Report**	LM_RUNCTL_LMBO003
LMBO004 Training Unit Pool Usage	Lists details of training unit pool usage for each customer organization.	**Enterprise Learning** > **Financial Reports** > **Training Unit Pool** > **Training Unit Pool Usage**	LM_RUNCTL_LMBO004
LMBO005 Training Unit Expiration	Lists details for training unit pools for each customer organization, including purchase and expiration dates, number of training units purchased, and amount paid.	**Enterprise Learning** > **Financial Reports** > **Training Unit Expiration** > **Training Unit Expiration**	LM_RUNCTL_LMBO005
LMBO006 External Customer Payment Pending	Lists all pending payment enrollments and registrations for each customer organization.	**Enterprise Learning** > **Financial Reports** > **Payment Pending** > **Payment Pending**	LM_RUNCTL_LMBO006
LMBO007 Purchase Order Usage	Lists the details of purchase order usage for each customer organization.	**Enterprise Learning** > **Financial Reports** > **Purchase Order Usage** > **Purchase Order Usage Report**	LM_RUNCTL_LMBO007
LMBO008 Purchase Order Balance	Lists current balances and expiration dates of purchase orders for each customer organization.	**Enterprise Learning** > **Financial Reports** > **Purchase Order Balance** > **Purchase Order Balance Report**	LM_RUNCTL_LMBO008

