Oracle Talent Management Cloud
Using Learning

19C
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos**: Go to the Oracle Help Center to find guides and videos.
- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td><strong>&gt;</strong></td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
Oracle Learning Cloud: Overview

Oracle Learning Cloud is an Enterprise Learning Management System that makes learning available to your employees at any time and anywhere.

Oracle Learning Cloud enables administrators to deploy and track compliance and development-based learning, and managers to oversee their team’s learning. Your HR specialists manage a learning catalog, and drive compliance needs by administering required learning across your entire organization. Your learning specialists assemble online offerings, courses, and specializations using videos, PDF documents, web links, Skillsoft content, and SCORM- and AICC-compliant content. Your subject matter experts can easily share their knowledge with the rest of your organization, and gain recognition for their contributions. Managers can push learning to their team members, and track their progress. Learners across your organization can discover, consume, publish, and collaborate on content that is relevant to their job roles using our digital learning capabilities. They can also download content to mobile devices to consume learning offline.

Getting Started

To get started, review the information about provisioning and configuration in the Oracle Learning Cloud master article (2158160.1) on My Oracle Support at https://support.oracle.com

Related Topics

- Fostering a Collaborative Learning Approach: Critical Choices
- Oracle Learning Cloud - Master Article on My Oracle Support
Chapter 2

Managing the Catalog Resources

Catalog Resources: Explained

Catalog resources are learning content items that you associate to learning activities. You add catalog resources, so that you or other administrators can use them when creating learning.

Catalog resources can be:

- Self-paced catalog resources: items associated with electronic learning.
- Instructor-led training catalog resources: items associated with learning that is delivered by an instructor, and which takes place in either a physical or virtual location.

Self-Paced Catalog Resources

Catalog resources such as SCORM, AICC, PDF, web links, and assessments are self-paced, electronic learning items that are delivered to learners through offering activities. The content you add is imported and uploaded to the content server.

<table>
<thead>
<tr>
<th>Catalog Resource</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCORM</td>
<td>Sharable Content Object Reference Model. A specification developed by the Advanced Distributed Learning group to enable sharing of online content across learning platforms. You can import content that is SCORM 1.2 or SCORM 2004 (Edition 2 and Edition 3) compliant. The content is in the XML format and packaged into a single .zip file format. Ensure the manifest file is not in another folder, it should be at the root level. During import, the application creates the content structure by reading the XML files that conform either to the SCORM (SCORM 1.2 or SCORM 2004 Edition.</td>
</tr>
<tr>
<td>AICC</td>
<td>The Aviation Industry Computer-Based Training Committee (AICC) was a group of technology-based training professionals who developed guidelines for computer-based training for the aviation industry. These guidelines are now commonly used by other industries to manage their learning requirements. The application supports importing learning content that conforms to the AICC specification. AICC is a similar format to SCORM, the content is in the XML format and packaged into a single .zip file format. Ensure the manifest file is not in another folder, it should be at the root level. During import, the application creates the content structure by reading the XML files that conform to the AICC Level 1 Version 2.2 or 4.0 standards.</td>
</tr>
<tr>
<td>Video</td>
<td>Video h.264 with AAC format are supported.</td>
</tr>
<tr>
<td>PDF</td>
<td>PDF documents are supported. PDFs do not communicate completion statuses back to Oracle Learning Cloud. Once an activity is started, that is backed by this type of content, it is considered complete.</td>
</tr>
<tr>
<td>Web link</td>
<td>A URL to another location on the Internet, and used for learning with Oracle Learning Cloud. Web links do not communicate completion statuses back to Oracle Learning Cloud. Once a web link activity is started, it is considered complete.</td>
</tr>
<tr>
<td>Assessment</td>
<td>Assessments are tests that you add to an offering to test learners' understanding of course material. Assessments are presented to learners in the form of a questionnaire. Assessment questions and questionnaires are created in the Setup and Maintenance work area.</td>
</tr>
</tbody>
</table>
### Catalog Resource Definition

<table>
<thead>
<tr>
<th>Catalog Resource</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skillsoft</td>
<td>Content that is imported from a Skillsoft library.</td>
</tr>
</tbody>
</table>

### Instructor Led Training Catalog Resources

Instructor led training resources are items that are associated with learning activities delivered by an instructor. Once you define these resources, they can be reused by you or other administrators to create new instructor led training activities.

<table>
<thead>
<tr>
<th>Catalog Resource</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom</td>
<td>A classroom is a location where a group of learners are taught material. A classroom is a resource object that is associated to an instructor led training or virtual instructor led training activity.</td>
</tr>
<tr>
<td>Instructor</td>
<td>An instructor is an individual that teaches a topic to a group of learners. An instructor is a resource object that is associated to an instructor led training or virtual instructor led training activity.</td>
</tr>
<tr>
<td>Training Supplier</td>
<td>A training supplier is an external company that a company may contract with for their training needs.</td>
</tr>
</tbody>
</table>

### Adding SCORM and AICC Content: Procedure

Before you can use SCORM and AICC content files with learning activities, you must import them to the learning resources catalog.

Before you begin:

- Ensure that SCORM and AICC files are SCORM and AICC compliant.
- Ensure that SCORM and AICC files are packaged in a single .zip file.
- Ensure that the manifest file is in the root level folder, and not in another folder.

1. On the Catalog Resources page, click the Content tab.
2. Click **Add Content**.
3. Select **Add Online Content**.
4. Follow the instructions on the page to drag and drop a file, or browse to locate and select a file.
5. Select the appropriate content .zip file.
6. Click **Open**. In the **Import Content** window, you can view the progress of the import.
7. Enter a title and description of the file. If you don’t specify a title, the uploaded content uses the name of the file as the title.
8. Click **Save and Close**.

### Replacing SCORM Content

You can replace previously uploaded SCORM content in the catalog, even if that content is already associated with an offering activity.
Adding Video Content: Procedure

Before you can use video files with learning activities, you must import them to the learning resources catalog.

1. On the Catalog Resources page, click the Content tab.
2. Click Add Content.
3. Select Add Video.
4. Follow the instructions on the page to drag and drop a file, or browse to locate and select a file.
5. Select the appropriate content file.
6. Click Open. In the Import Content window, you can view the progress of the import.
7. Enter a title and description of the file. If you don’t specify a title, the uploaded content uses the name of the file as the title.
8. Click Save and Close.

Adding a Web Link: Procedure

Before you can use web links with learning activities, you must add them to the learning resources catalog.

1. On the Catalog Resources page, click the Content tab.
2. Click Add Content.
3. Select Add Web Link.
4. Enter a title.
5. Enter the web link.
6. Select the Mark as complete when learner opens the web link check box if you want users to receive completion credit for having opened the link. Unlike SCORM and AICC, web links do not track a user’s completion of the activity and communicate back with Oracle HCM Cloud.
7. Select either Active or Inactive for the Status field. If you make the item inactive, it will not be available for selection by you or other Administrators when creating learning activities.
8. Select start and end dates. The start date is the date the content becomes visible to users. If the current dates is earlier than the date you enter in the Start Date field, then the item is not visible to users.
9. Enter a description.
10. Click Save and Close.

Adding a PDF File: Procedure

Before you can use PDF files with learning activities, you must import them to the learning resources catalog.

1. On the Catalog Resources page, click the Content tab.
2. Click Add Content.
Adding an Assessment Questionnaire to the Catalog Resources: Procedure

Assessments are tests that you add to an offering to test learners’ understanding of course material. Assessments are presented to learners in the form of a questionnaire.

Prerequisites: Learning assessment questionnaires must be created.

1. In the My Client Groups work area, click **Learning**.
2. Click **Catalog Resources**.
3. On the Catalog Resources page, click the **Content** tab.
4. In the Search Results section, click **Add Content**.
5. Select **Add Assessment**.
6. Enter a title for the assessment.
7. Search for and select the questionnaire you want to use for the assessment.
8. Enter a description for the assessment.
9. Indicate the start date and end date for the assessment. These are the dates during which the assessment is available for associating with offerings.
10. Select the **Enable passing score** check box if you selected a questionnaire that has points associated with each question and you want to use them for calculating a passing score.
   a. In the **Mastery Score** field, enter the minimum score required to pass the assessment. If the learner obtains a score below the minimum, the learner is marked as incomplete, and this is rolled up to “incomplete” at the offering and course level.
   b. Indicate whether you want the learning administrator to see learners’ scores. Clearing this check box only allows administrators to see that learners have either passed or failed the assessment.
   c. Indicate whether you want learners to see their scores. Clearing this check box only allows learners to see that they have either passed or failed the assessment.
11. Select the **Enable learners to view completed assessments** check box to allow learners to look at their completed assessment. Clear this check box to prevent learners from sharing their correct answers with others.
12. Select the **Enable time limit** check box to indicate a specific amount of time learners have to complete the assessment. You can indicate the time limit in minutes or hours. If you use this setting, learners see a countdown clock in the assessment. Once learners start a timed assessment, they cannot save and close the assessment until they have submitted it or the time has run out. When the time runs out, the assessment is submitted and scored. The score is then compared against the mastery score to determine if learners passed or failed the assessment.
13. Select the **Enable attempts** check box to allow learners to make multiple attempts to pass the assessment, and then indicate the number of times learners can attempt to pass the assessment.
14. Change the status to **Active**.
15. Click **Save and Close**.
Creating a Classroom: Procedure

A classroom is a physical location in which an instructor delivers training to a group of learners. A classroom can be associated with instructor led training or a virtual instructor led training activity. You create and define the properties of a classroom resource in the catalog so that it can be used by you or other administrators to create training activities.

1. On the Catalog Resources page, click the Classrooms tab.
2. Click Create.
3. In the Title field, enter a title or name for the classroom.
4. In the Description field, enter a description for the classroom to help users to identify the space the classroom occupies. For example, "The 3rd floor conference room on the west side of the building."
5. In the Capacity field, enter the maximum number of seats available in that classroom. This information is useful later when you or other administrators are trying to decide which classroom to use for an offering activity.
6. In the Contact field, search for and select the appropriate person if there is a contact for this classroom. For example, there may be another administrator or office manager in charge of this classroom.
7. In the Location field, select one of the following:
   - Named Location - allows you to search and select from a list of locations configured in Oracle HCM Cloud. This option is recommended for reporting consistency.
   - One-Time Location - allows you to create a single-use location for the classroom. This location is not saved in Oracle HCM Cloud for future use. An example is a hotel conference room that will not be used in the future for training.
8. In the Training Supplier field, search for and select the appropriate organization if this classroom is associated with a training supplier.
9. Add any attachments to display to administrators and self-service learners, or administrators only.
10. Click Save and Close.

Creating an Instructor: Procedure

Instructors are users within Oracle HCM Cloud that you designate as the persons responsible for teaching instructor led training and virtual instructor led training activities. When you designate people as instructors, you add them as catalog resources that can be associated with training activities.

1. On the Catalog Resources page, click the Instructors tab.
2. Click Create.
3. Use the filters at the top of the Person Search window to find the person you want.
4. In the Search Results section, select the appropriate person.
5. Click Select.
6. If the person is affiliated with a training supplier, in the Instructor Details section, search for and select the appropriate Training Supplier.
7. Click Save and Close.

Creating a Training Supplier: Procedure

A training supplier is an external company that you contract with for training needs. You set up training suppliers as catalog resources so that you can associate them with instructors and classrooms. Associating training suppliers to instructors and
classrooms helps you to narrow search results when looking for instructors or classrooms that are affiliated with particular training suppliers.

1. On the Catalog Resources page, click the Training Suppliers tab.
2. In the Title field, enter a title or name for the training supplier.
3. In the Description field, enter a description for the training supplier to help further identify the company or organization.
4. In the Contact field, search for and select the appropriate person if there is a contact for this classroom.
5. Click Save and Close.
# Managing the Learning Catalog

## Learning Catalog: Explained

The Learning Catalog contains the different objects you use to create learning for your users. You have the power and flexibility to design your Learning Catalog in a way that meets your business requirements.

<table>
<thead>
<tr>
<th>Catalog Item</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Courses</strong></td>
<td>Courses are specific learning objectives that define what learners are going to learn. Create a course to define the requirements and outcomes for a learning topic, and to indicate to learners what they will achieve once they have completed the course. Courses do not define how the learning is delivered to learners. For that, you create an offering.</td>
</tr>
<tr>
<td><strong>Offerings</strong></td>
<td>Use offerings to make courses available to learners. Courses can have multiple offerings, and learners only need to complete one to complete the course. Offerings contain the activities that learners consume to complete the course. Offerings can have activities that are:</td>
</tr>
<tr>
<td></td>
<td>• Instructor-led - led by an instructor and happens at a specific date and time. These can occur in a specified physical location or offered as a virtual session using a virtual web conferencing provider. They can consist of multiple activities, with each activity happening on different day or location, and taught by the same or different instructors. You can also offer multiple instructor-led offerings for a given course so learners can choose the locations and times that are convenient to them.</td>
</tr>
<tr>
<td></td>
<td>• Self-paced - Electronically-delivered courses that learners can consume and complete at their own pace. Supported content types include SCORM, AICC, PDF, videos, assessments, and web links. You can also offer multiple self-paced offerings for the same course, so that learners can choose the ones that work best for them. For example, you can offer the same self-paced offering in different languages.</td>
</tr>
<tr>
<td></td>
<td>• Blended - a combination of both instructor-led and self-paced activities. This provides you with flexibility for designing offerings for the best learning experiences.</td>
</tr>
<tr>
<td><strong>Specializations</strong></td>
<td>Specializations are a collection of courses grouped together to drive a larger learning objective. Use specializations when you want to accomplish larger learning objectives, and there are specific requirements that learners must achieve to claim completion for those objectives. You can indicate that learners must follow a specific learning path and complete multiple courses to achieve a specialization. For example, you can create specializations for new hire onboarding, sales manager training, or for mastering Oracle HCM Cloud.</td>
</tr>
<tr>
<td><strong>Assessments</strong></td>
<td>Assessments are tests that you add to an offering to test learners' understanding of course material. Assessments are presented to learners in the form of a questionnaire. Assessments can be defined as either the first or last activity of an offering, depending on what you want to test. For example, you can define an assessment as the first activity of an offering if you want to test learners' knowledge of a subject prior to starting the course. You can define an assessment as the last activity of an offering if you want to see if learner's have met the course outcome requirements.</td>
</tr>
<tr>
<td><strong>Evaluations</strong></td>
<td>Use evaluations to capture learner feedback about completed offerings. Evaluations are presented to learners in the form of a questionnaire. Learners are automatically taken to the evaluation questionnaire once they complete an offering. In the case of instructor-led training, learners can complete the evaluation questionnaire when they mark the offering as being complete.</td>
</tr>
</tbody>
</table>
Courses

Create Courses

A course is an entity in the Learning Catalog that contains generic information about what learners will learn.

A course has offerings, which are instances of the course that contain information about how, when, and where learners consume the information. For example, a course called "First Aid" may have an instructor-led training offering in San Francisco, another instructor-led training offering in Montreal, and a self-paced online offering. Learners can decide which offering of the course they want to take.

Courses contain information that is common to all offerings. This saves you from having to re-enter the same information for each instance of the course. Courses can be created during implementation (using HDL or the user interface), and on an ongoing basis.

You can do the following with courses:

- Create course titles and descriptions visible to learners in the self-service experience.
- Manage the course in the catalog only between the start and end dates. Learners can access the course only between these dates.
- Specify course duration and effort. For example, a course might take 5 days, at 8 hours a day. This data is for information purposes only, and isn’t used to determine the offering dates or duration.
- Schedule offerings for a course only after the course start date and before the course end date. You may want to decide the course dates based on the offerings you plan to schedule for the course.
- Include a course in a specialization only if the course start and end dates are within the specialization start and end dates. When you search for courses to add to a specialization, the search results display only those courses with dates that fall within the specialization start and end dates.
- Automatically create a course and an offering for any content by selecting the content in the Manage Catalog Resources page and click Create in the Catalog Items Using the Content region. You can then define the course and offering.
• Create prerequisites that learners must satisfy before registering for a course.
• Set up learning outcomes, which are specific skills, qualities, or qualifications that learners acquire when successfully completing a course.
• Set up default attributes; global access rules that are pre-selected when administrators create new courses.
• Add courses to learning communities. A learning community is a place where learning can be grouped around a particular topic or area of interest and shared or assigned to a distinct set of people known as the community members.
• Set up access control rules to define if and how learners can find and sign up for courses.

Creating a Course: Procedure

A course is an entity in the Learning Catalog that contains generic information about what learners will learn. Once a course is created, you can add offerings to it. When you create a course, an course number is automatically generated for it.

✓ Note: You can specify custom course numbers when you upload courses using HDL.

1. In the My Client Group area, click Learning.
2. Click Learning Catalog.
3. On the Learning Catalog page, select the Courses tab.
4. Click Create.
5. Enter a title for the course. This is visible to learners when they search for a course.
6. Enter the syllabus for the course. This is visible to learners when they search for a course.
7. Enter a short description for the course. This is visible to learners when they search for a course.
8. Select a publish start date. This is the date a course becomes visible to learners in Self-Service. If you do not select a date, then the course is visible to learners by default.
9. Select a publish end date. This is the date a course becomes unavailable to learners in Self-Service. If you do not select a date, then the course is unavailable to learners by default.
10. Enter the minimum expected effort (in hours) to define the minimum amount of time that is required to complete offerings associated to this course. This is visible to learners when they search for a course.
11. Enter the maximum expected effort (in hours) to define the maximum amount of time that is required to complete offerings associated to this course. This is visible to learners when they search for a course.
12. Select the currency used to define the minimum and maximum price of the course.
13. Enter the minimum price for an offering associated with this course. This is visible to learners when they search for a course.
14. Enter the maximum price for an offering associated with this course. This is visible to learners when they search for a course.
15. Upload cover art. The image you select is visible to learners in the Course Details page, and in thumbnail images in various places.
16. Add a trailer for the course. A trailer is a video used to show brief excerpts or details of the course. This trailer is visible to learners in Self-Service.
17. If you have included any Base Learning Item flexfields or Course level flexfields, complete them. Flexfields can be used to define additional metadata at the course level. Flexfields are used to define and track organization-specific information.
18. Click Save.
19. Select the Prerequisites tab, and add prerequisites for the course. If learners do not meet the requirements of a course or offering, they are blocked from registering for it.
20. Select the Learning Outcomes tab, and add learning outcomes for the course. Learning outcomes are the objectives that a learner will achieve when they successfully complete a course, such as licenses and certifications. Learning outcomes are recorded on the learner’s talent profile.
21. Select the Default Offering Attributes tab, and add the default offering attributes to the course. These are default values for any offering that is subsequently created for this course. These attributes are only used to default the values when you create a new offering, and you can change them at the offering level. They are not used for any other purpose.

22. Select the Communities tab, and add communities for the course.

23. Select the Default Assignment Rules tab, and add default assignment rules for the course. These are the rules that are used when you create new learning assignments for this course.

24. Click Save and Close.

Related Topics
- Learning Assignments: Explained

Offerings

Offerings and Activities: Explained

An offering is a specific instance of a course. An activity is a discrete portion of an offering.

While a course contains generic information describing what learners will learn (title, description, and duration), an offering contains the details describing how, when, and where the course requirements are delivered. For example, a course called "First Aid" may have an instructor-led training offering in San Francisco, another instructor-led training offering in Montreal, and a self-paced online offering. Learners can decide which offering of the course they want to take. Each of those offerings may have different activities associated with them. Learners must complete all activities associated with the offering they select to get credit for completing the course.

Activities

When you create an offering, you add activities to it. You must define at least one activity for learners to engage with the offering. Depending on the type of offering you create, you may be able to select an ILT, or self-paced activity, or both.

Offering Types

There are three types of offerings:

- Instructor led training - contain only instructor led activities. ILT activities are discrete live online, or live on-site events, led by one or more instructors, for a specific period within one day.

- Self-paced - contain only self-paced activities. Self-paced activities represent work learners do online, offline, or on-site with no time constraints. However, learners still need to complete the activity before the assignment due date, if it’s specified in the assignment.

- Blended - contain both self-paced or instructor led activities.

Offering Creation

You can create an offering in one of the following ways:

- On the Offerings tab, create an offering by searching for and selecting an existing course.

- On the Courses tab, create a course and then create an offering for the course.
Other Offering and Activity Actions
There are other actions you can perform for offerings and activities.

- You can edit, delete and copy offerings. Copied offerings result in copied activities.
- You can edit, delete and copy activities.
- You can re-order non-timed activities for an offering. You cannot move timed activities so that an earlier activity appears after a later activity, because they are represented in chronological order based on their timing.

Related Topics
- Adding Learners: Procedure
- Learning Assignments: Explained
- Learning Initiatives: Explained

Creating an ILT Offering and Activity: Procedure
Instructor led training offerings contain only instructor led training activities.

1. In the My Client Group area, click Learning.
2. Click Learning Catalog.
3. On the Learning Catalog page, select the Offerings tab.
4. Click Create.
5. Select Instructor-Led Offering.
6. Use the filters to search for and select the course for which you want to create the offering. You can search by course attributes or learning profiles.
7. Click Select.
8. Enter a new or updated title for the offering. By default, the title is the same as the course. Learners can see the title of the offering on the offerings listing page.
9. Enter a description for the offering. Learners can see the description by clicking the information icon next to the offering title on the offering listing page.
10. Select the language for the offering. The language is displayed to learners on the offering listing page.
11. Enter the offering start and end dates. Typically, these are the first and last dates of the instructor led training.
12. Select a primary classroom. An offering’s activities can have different or multiple classrooms, but, this is the primary classroom for the offering. The location displays to learners in the offering listing as city, state (if available), country.

✏️ Note: You must first create instructors and classrooms in the Catalog Resources area before you can associate them with offerings.

13. Select either Instructor or Training Supplier for the facilitator type.
14. If you selected Instructor, select a primary instructor. An offering’s activities can have different or multiple instructors, but this is the primary instructor for the offering. This instructor displays to learners in the offering listing. If you selected Training supplier, select the appropriate training supplier.

✏️ Note: If the instructor or training supplier changes on the course after you saved the primaries to the offering, the default value still appears on the activities. If you change something other than the instructor or the training supplier, you can save the page without validating that the instructor is in the instructor list on the course. You can only see the instructors that are allowed based on your data security settings.
15. Select the offering coordinator. You can use this field in a couple of ways.
   ◦ To assign an owner to a specific offering. For example, if you have a large department of Learning Administrators, you can create ownerships for specific offerings so Learning Administrators know which offerings they own and they do not update offerings assigned to other Learning Administrators.
   ◦ To provide one coordinator value to a Learner in scenarios where a Learner has an offering with multiple activities that have different instructors assigned.

16. Enter the publish start date. This is the date the offering becomes visible to learners in self-service. This date must be on or after the course publish start date.

17. Enter the publish end date. This is the date the offering is no longer visible to learners in self-service. This date must be on or before the course publish end date.

18. Select the Capacity Rules check box to enable capacity checking for this offering. This limits the number of learners that can register for this offering to the number you enter in the Maximum Capacity field.
   a. Enter the minimum capacity. This field is for informational purposes only, and nothing happens if the minimum capacity isn’t met. The number you type here is useful if you are planning to create notifications to inform an instructor that the minimum capacity has been met.
   b. Enter the maximum capacity. This is the maximum number of learners allowed for the offering. Once maximum capacity is met, any additional learners who register are automatically added to the waitlist (if the waitlist rules are configured to allow learners add themselves to the waitlist). Learners can see how many seats are left on the offering listing.

   ⚠️ Note:

   The Booked Seats field displays the number of seats that are currently booked.

   c. Select the Waitlist Rules check box to enable learners to add themselves to the waitlist from self service. If you clear this check box, only administrators are able to add learners to the offering waitlist.

   ⚠️ Note: The Waitlist Mode displays what the waitlist mode is currently set to.

19. Select the Override course default payment and pricing check box to override the offering defaults set on the (parent) course. Line items cannot be marked as required here. Line item types that are marked as required on the course offering defaults can’t be removed here, but the values can be overridden.

20. Complete any flexfields you have deployed for offerings in the Additional Attributes sections. You can use flexfields to define and track organization-specific information not captured by standard fields. Learning Administrators can use them in Advanced Search when searching for or listing offerings. Learners can view them on their offering details page.

21. Select the Activities tab.

22. Click Create to add an activity to the offering.

23. Enter a title for the activity. This is displayed to learners on the activity listing page, and activity detail page.

24. Enter a description to provide learners with information about the activity.

25. Select the date the activity takes place.

26. Enter the start and end times for the activity.

27. Select the time zone for the start and end times.

28. If this is an activity that repeats, select one of the following from the Repeat drop-down list:
   ◦ Daily
   ◦ Weekly
   ◦ Monthly
Every Month

Note:
This setting enables you to create multiple recurrences for this activity, but future edits to the activities must be done each occurrence individually.

a. Complete the fields that display for each recurrence type.
b. Enter an Activity Title Suffix. The default is "Session." Each session in the recurrence pattern will use this suffix. For example: Session 1, Session 2, Session 3.

29. Enter the expected effort for the activity. This can be different from the duration, since the duration may include lunch and breaks.
30. Select the Allow person completing the activity to mark themselves complete check box. In some cases, an administrator or instructor will not be managing attendance. Selecting this check box allows learners to mark their own attendance
31. Select one or more instructors for this activity.
32. If there is a virtual classroom, enter the URL, or search for and select from among a pre-defined set of virtual classrooms.
33. If there is a classroom, search for and select from a pre-defined set of classrooms, or add a new classroom based on predefined locations in HCM Cloud, or define a single-use location.
34. Define other resources needed for this activity. This field is used to capture information that can be used for reporting and alerts. For example, you may create an automated report the day an activity is scheduled to occur and send an email to facilities that list resources such as notebooks and pens.
35. Add attachments for other administrators or instructors. For example, there may be a particular lesson plan that accompanies this activity.
36. Click Save and Close.

Creating a Self-Paced Offering and Activity: Procedure

Self-paced offerings contain only self-paced activities.

1. In the My Client Group area, click Learning.
2. Click Learning Catalog.
3. On the Learning Catalog page, select the Offerings tab.
4. Click Create.
5. Select Self-Paced Offering.
6. Use the filters to search for and select the course for which you want to create the offering. You can search by course attributes or learning profiles.
7. Click Select.
8. Enter a new or updated title for the offering. By default, the title is the same as the course. Learners can see the title of the offering on the offerings listing page.
9. Enter a description for the offering. Learners can see the description by clicking the information icon next to the offering title on the offering listing page.
10. Enter the publish start date. This is the date the offering becomes visible to learners in self-service. This date must be on or after the course publish start date.
11. Enter the publish end date. This is the date the offering is no longer visible to learners in self-service. This date must be on or before the course publish end date.
12. Select the language for the offering. The language is displayed to learners on the offering listing page.
13. Select the Capacity Rules check box to enable capacity checking for this offering. This limits the number of learners that can register for this offering to the number you enter in the Maximum Capacity field.
Note: Defining capacity rules for self-paced offerings is rare.

a. Enter the minimum capacity. This field is for informational purposes only, and nothing happens if the minimum capacity isn’t met. The number you type here is useful if you are planning to create notifications to inform an instructor that the minimum capacity has been met.

b. Enter the maximum capacity. This is the maximum number of learners allowed for the offering. Once maximum capacity is met, any additional learners who register are automatically added to the waitlist (if the waitlist rules are configured to allow learners add themselves to the waitlist). Learners can see how many seats are left on the offering listing.

Note: The Booked Seats field displays the number of seats that are currently booked.

c. Select the Waitlist Rules check box to enable learners to add themselves to the waitlist from self service. If you clear this check box, only administrators are able to add learners to the offering waitlist.

Note: The Waitlist Mode displays what the waitlist mode is currently set to.

14. Select the Override course default payment and pricing check box to override the offering defaults set on the (parent) course. Line items cannot be marked as required here. Line item types that are marked as required on the course offering defaults can’t be removed here, but the values can be overridden.

15. Complete any flexfields you have deployed for offerings in the Additional Attributes sections. You can use flexfields to define and track organization-specific information not captured by standard fields. Learning Administrators can use them in Advanced Search when searching for or listing offerings. Learners can view them on their offering details page.

16. Select the Activities tab.

17. Click Create to add an activity to the offering.

18. Enter a title for the activity. This is displayed to learners on the activity listing page, and activity detail page.

19. Enter a description to provide learners with information about the activity.

20. Click the magnifying glass icon, and select the offering content item you want to add. Depending on the content type you select, the content type information populates automatically.

21. Enter the expected effort for the activity. Depending on the content type you select, the expected effort information may populate automatically.

22. Add attachments for other administrators or instructors. For example, there may be a particular lesson plan that accompanies this activity.

23. Depending on the type of content type you selected for this activity, you may be allowed to select the Allow person completing the activity to mark themselves complete check box. In some cases, an administrator or instructor will not be managing attendance, and you can this check box to allow learners to mark their own attendance.

24. Click Save and Close.

Creating a Blended Offering and Activity: Procedure

Blended offerings can contain both instructor-led and self-paced activities.

1. In the My Client Group area, click Learning.
2. Click Learning Catalog.
3. On the Learning Catalog page, select the Offerings tab.
4. Click Create.
5. Select **Blended Offering**.
6. Use the filters to search for and select the course for which you want to create the offering. You can search by course attributes or learning profiles.
7. Click **Select**.
8. Enter a new or updated title for the offering. By default, the title is the same as the course. Learners can see the title of the offering on the offerings listing page.
9. Enter a description for the offering. Learners can see the description by clicking the information icon next to the offering title on the offering listing page.
10. Select the language for the offering. The language is displayed to learners on the offering listing page.
11. Enter the offering start and end dates. Typically, these are the first and last dates of the instructor led training.
12. Select a primary instructor. An offering’s activities can have different or multiple instructors, but this is the primary instructor for the offering. This instructor displays to learners in the offering listing.
13. Select a primary location. An offering’s activities can have different or multiple locations, but, this is the primary location for the offering. The location displays to learners in the offering listing as city, state (if available), country.
14. Enter the publish start date. This is the date the offering becomes visible to learners in self-service. This date must be on or after the course publish start date.
15. Enter the publish end date. This is the date the offering is no longer visible to learners in self-service. This date must be on or before the course publish end date.
16. Select the **Capacity Rules** check box to enable capacity checking for this offering. This limits the number of learners that can register for this offering to the number you enter in the **Maximum Capacity** field.
   a. Enter the minimum capacity. This field is for informational purposes only, and nothing happens if the minimum capacity isn’t met. The number you type here is useful if you are planning to create notifications to inform an instructor that the minimum capacity has been met.
   b. Enter the maximum capacity. This is the maximum number of learners allowed for the offering. Once maximum capacity is met, any additional learners who register are automatically added to the waitlist (if the waitlist rules are configured to allow learners add themselves to the waitlist). Learners can see how many seats are left on the offering listing.

   ✍️ **Note:** The **Booked Seats** field displays the number of currently booked seats.

   c. Select the **Waitlist Rules** check box to enable learners to add themselves to the waitlist from self-service. If you clear this check box, only administrators are able to add learners to the offering waitlist.

   ✍️ **Note:** The **Waitlist Mode** field displays the current waitlist mode setting.
17. Select the **Override course default payment and pricing** check box to override the offering defaults set on the (parent) course. Line items cannot be marked as required here. Line item types that are marked as required on the course offering defaults can’t be removed here, but the values can be overridden.
18. Complete any flexfields you have deployed for offerings in the Additional Attributes sections. You can use flexfields to define and track organization-specific information not captured by standard fields. Learning Administrators can use them in Advanced Search when searching for or listing offerings. Learners can view them on their offering details page.
19. Select the Activities tab.
20. Click **Add Activity** to add an activity to the offering.
21. Select either **Add Instructor-Led Activity** or **Add Self-Paced Activity**. If you select **Add Instructor-Led Activity**, follow these instructions:
   a. Enter a title for the activity. This is displayed to learners on the activity listing page, and activity detail page.
   b. Enter a description to provide learners with information about the activity.
   c. Select the date the activity takes place.
d. Enter the start and end times for the activity.
ed. Select the time zone for the start and end times.
f. If this is an activity that repeats, select one of the following from the Repeat drop-down list:
   - Daily
   - Weekly
   - Monthly
   - Every Month
   
   † Note: This setting enables you to create multiple recurrences for this activity. Future edits to the activities must be done for each separate occurrence.
   
i. Complete the fields that display for each recurrence type.
   ii. Enter an Activity Title Suffix. The default is "Session." Each session in the recurrence pattern will use this suffix. For example: Session 1, Session 2, Session 3.

   g. Enter the expected effort for the activity. This can be different from the duration, since the duration may include lunch and breaks.

   h. Select the Allow person completing the activity to mark themselves complete check box. In some cases, an administrator or instructor will not be managing attendance. Selecting this check box allows learners to mark their own attendance.

   i. Select one or more instructors for this activity.

   j. If there is a virtual classroom, enter the URL, or search for and select from among a pre-defined set of virtual classrooms.

   k. If there is a classroom, search for and select from a pre-defined set of classrooms, or add a new classroom based on predefined locations in HCM Cloud, or define a single-use location.

   l. Define other resources needed for this activity. This field is used to capture information that can be used for reporting and alerts. For example, you may create an automated report the day an activity is scheduled to occur and send an email to facilities that list resources such as notebooks and pens.

   m. Add attachments for other administrators or instructors. For example, there may be a particular lesson plan that accompanies this activity.

If you selected Add Self-Paced Activity, follow these instructions:

a. Enter a title for the activity. This is displayed to learners on the activity listing page, and activity detail page.

b. Enter a description to provide learners with information about the activity.

c. Click the magnifying glass icon, and select the offering content item you want to add. Depending on the content type you select, the content type information populates automatically.

d. Enter the expected effort for the activity. Depending on the content type you select, the expected effort information may populate automatically.

e. Add attachments for other administrators or instructors. For example, there may be a particular lesson plan that accompanies this activity.

f. Depending on the type of content type you selected for this activity, you may be allowed to select the Allow person completing the activity to mark themselves complete check box. In some cases, an administrator or instructor will not be managing attendance, and you can this check box to allow learners to mark their own attendance.

22. Click Save and Close.
Specializations

Specializations: Explained

Specializations allow learning administrators to design learning plans or learning paths so learners can achieve a larger learner objective.

Use specializations to define the courses that learners must complete to achieve the objectives of a specialization. Learners must complete the course requirements in all sections of a specialization to complete the specialization. For example, you create a specialization called Employee Welfare. This specialization consists of two sections. Section 1 contains two courses: Health and Safety, Firefighting. Section 2 contains one course: Ergonomics.

You can create specializations at any point in time, that is during implementation or on an ongoing basis.

A specialization consists of several attributes:

- Sections and activities
- Prerequisites
- Learning outcomes
- Communities
- Learners
- Social

Sections and Activities

A specialization contains one or more sections. A section is a container for a logical grouping of activities (courses). You must add at least one section in a specialization. Each section can contain one or more courses. You can select how many activities the learner must complete in a section.

For example, you create a specialization called Employee Welfare. This specialization consists of two sections. Section 1 contains two courses: Health and Safety, Firefighting. Section 2 contains one course: Ergonomics.

Prerequisites

You can define prerequisites that can be enforced prior to allowing learners to enroll. Learners can be blocked from registering for a specialization if they do not meet the prerequisites.

Learning Outcomes

You can define learning outcomes that learners will achieve when they successfully complete a specialization. Learning outcomes are recorded on the learners' talent management profiles.

Communities

You can manage the learning communities that a specialization is a part of.

Learners

You can manage learner visibility, learner assignments, and learning initiatives for specializations.
Social
You can access and manage the social conversation around specializations.

Related Topics
• Social Learning: Examples

Creating a Specialization: Procedure
Create a specialization to design learning plans or learning paths so learners can achieve a larger learner objective.

To create a specialization, go to the Learning work area under My Group Clients.

Perform these steps:
• Enter general information
• Add sections and activities
• Define learning outcomes
• Define prerequisites
• Add communities

Before you begin:
• Include a cover for the specialization. Create the image and save it in a local folder.
• Include a trailer video. Publish the video so that it’s available under My Published Videos.

Enter General Information
Enter basic information about the specialization.

1. Click Learning Catalog.
2. On the Learning Catalog page, click the Specializations tab.
3. Click Create.
4. Complete the fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Title of the specialization that is shown to learners and used in search. For example: Project Management.</td>
</tr>
<tr>
<td>Specialization Number</td>
<td>Not editable. The number is auto-generated. You can specify custom specialization numbers using HDL.</td>
</tr>
<tr>
<td>Cover Art</td>
<td>Used to define the cover art image shown to learners in the self-service user experience. It is also used to generate the specialization thumbnail image used in various places.</td>
</tr>
<tr>
<td>Trailer</td>
<td>Video trailer shown to learners in the self-service user experience.</td>
</tr>
<tr>
<td>Description</td>
<td>Long description of the specialization shown to learners and used in search. For example: This specialization offers a series of courses to help you manage projects in your organization.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Description</td>
<td>Short description of the specialization shown to learners. For example: Learn to manage projects.</td>
</tr>
<tr>
<td>Publish Start Date</td>
<td>The date when the course becomes visible to learners in the self-service user experience. If this is left blank, the course is visible to learners by default.</td>
</tr>
<tr>
<td>Publish End Date</td>
<td>The date when the course becomes invisible to learners in the self-service user experience. If this is left blank, the course is visible to learners by default.</td>
</tr>
<tr>
<td>Minimum Expected Effort</td>
<td>Defines how much the minimum effort (in hours) is required by the offerings that are part of a specialization. This information is shown to learners in the Self-Service area. There is validation on this field against specific offerings.</td>
</tr>
<tr>
<td>Maximum Expected Effort</td>
<td>Defines how much the maximum effort (in hours) is required by offerings that are part of a specialization. This information is shown to learners in the Self-Service area. There is validation on this field against specific offerings.</td>
</tr>
</tbody>
</table>

5. Click **Save**.

### Add Sections and Activities

A specialization contains one or more sections. A section is a container for a logical grouping of activities (courses). You must add at least one section in a specialization. Each section can contain one or more activities. You can select how many activities the learner must complete in a section.

1. Click the **Sections** tab.
2. Click the **Add Section** button.
3. Complete the fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Title of the section. For example: Project Management Principles</td>
</tr>
<tr>
<td>Section Number</td>
<td>Not editable. The number is auto-generated.</td>
</tr>
<tr>
<td>Description</td>
<td>Long description of the section shown to learners. For example: This section includes courses on principles of project management.</td>
</tr>
</tbody>
</table>
| Number of Activities to Complete | All: All the courses in this section are mandatory.  
None: All the courses in this section are optional.  
Number: Entering a number means that the learners must complete that specific number of courses in this section to successfully complete that section. |
| Initial Assignment Status of Activities | Define the registration behavior that learners see when they access a course in this section through this specialization.  
- Active: Learners enrolled in this specialization can sign up for courses in this specialization, regardless of how the course is configured.  
- Inherit from Course: Learners will see the same behavior for the course whether they access it through the specialization or from outside (through searching or browsing directly for that course). |
4. Click OK
5. Click the Add Activity button.
6. In the Add Activity window, enter the name of a course and click the Search icon.
7. Select a course.
8. Click Add and Close.
9. Add more sections and activities as required.
10. Click Save.

Define Learning Outcomes
Define the learning outcomes that learners will achieve when they successfully complete a specialization. Learning outcomes are recorded on the learners’ talent management profiles.

1. Click the Learning Outcomes tab.
2. Click Add Content.
3. Select the type of learning outcome you want to add. For example, Competencies, Languages, Memberships.
4. Click the plus sign next to the content type.
5. Complete the fields.
6. Click Save.

Define Prerequisites
Define prerequisites that can be enforced prior to allowing learners to enroll. Learners can be blocked from registering for a specialization if they do not meet the prerequisites.

1. Click the Prerequisites tab.
2. Click Add Content.
3. Select the type of prerequisites you want to add. For example, Competencies, Languages, Memberships.
4. Click the plus sign next to the prerequisites type.
5. Complete the fields.
6. Click Save.

Add Communities
Add the learning communities to which a specialization is a part of.

1. Click the Communities tab.
2. Click Add.
3. Search and select the desired communities.
4. Click Save and Close.

Assessments
Learning Assessment: Explained

Add assessments to an offering to test learners' understanding of course material.

Assessments are presented to learners in the form of a questionnaire. Assessments can appear at any point during an offering, but generally they are defined as either the first or last activity of an offering, depending on what you want to test. For example, you define an assessment as the first activity of an offering if you want to test learners' knowledge of a subject prior to starting the course. You define an assessment as the last activity of an offering if you want to see if learner's have met the learning outcome requirements.

To use assessments in offerings, assessment questionnaires must first be created. To create a learning assessment questionnaire, you perform the following tasks:

- Create questions that appear in assessment questionnaires.
- Create an assessment questionnaire template. All questionnaires are based on templates to promote consistency.
- Create an assessment questionnaire.
- Configure an assessment in the Resource Catalog.
- Add an assessment to a learning activity.

Once assessment questionnaires are set up, you add them to the resources catalog and they become available for adding them to a learning activity.

Adding an Assessment Questionnaire to the Catalog Resources: Procedure

Assessments are tests that you add to an offering to test learners' understanding of course material. Assessments are presented to learners in the form of a questionnaire.

Prerequisites: Learning assessment questionnaires must be created.

1. In the My Client Groups work area, click Learning.
2. Click Catalog Resources.
3. On the Catalog Resources page, click the Content tab.
4. In the Search Results section, click Add Content.
5. Select Add Assessment.
6. Enter a title for the assessment.
7. Search for and select the questionnaire you want to use for the assessment.
8. Enter a description for the assessment.
9. Indicate the start date and end date for the assessment. These are the dates during which the assessment is available for associating with offerings.
10. Select the Enable passing score check box if you selected a questionnaire that has points associated with each question and you want to use them for calculating a passing score.
   a. In the Mastery Score field, enter the minimum score required to pass the assessment. If the learner obtains a score below the minimum, the learner is marked as incomplete, and this is rolled up to "incomplete" at the offering and course level.
   b. Indicate whether you want the learning administrator to see learners' scores. Clearing this check box only allows administrators to see that learners have either passed or failed the assessment.
   c. Indicate whether you want learners to see their scores. Clearing this check box only allows learners to see that they have either passed or failed the assessment.
11. Select the **Enable learners to view completed assessments** check box to allow learners to look at their completed assessment. Clear this check box to prevent learners from sharing their correct answers with others.

12. Select the **Enable time limit** check box to indicate a specific amount of time learners have to complete the assessment. You can indicate the time limit in minutes or hours. If you use this setting, learners see a countdown clock in the assessment. Once learners start a timed assessment, they cannot save and close the assessment until they have submitted it or the time has run out. When the time runs out, the assessment is submitted and scored. The score is then compared against the mastery score to determine if learners passed or failed the assessment.

13. Select the **Enable attempts** check box to allow learners to make multiple attempts to pass the assessment, and then indicate the number of times learners can attempt to pass the assessment.

14. Change the status to **Active**.

15. Click **Save and Close**.

### Creating an Assessment for an Offering: Procedure

An assessment is a type of an activity and multiple assessment activities can be added to an offering.

**Prerequisites:** Learning assessment questionnaires must be created.

1. In the My Client Groups work area, click **Learning**.
2. Click **Learning Catalog**.
3. On the Learning Catalog page, click the **Offerings** tab.
4. Search for and select an offering.
5. On the offering details page, click the **Definition** tile and click **Edit**.
6. Click the **Activities** tab.
7. Click **Create**.
8. Enter a title for the assessment.
9. Enter a description to provide learners with information about the activity.
10. In the **Offering Content** field, select the assessment you want to add. The Content Type field populates automatically.
11. Enter the expected effort for the activity.
12. Add attachments for other administrators or instructors.
13. Click **Save and Close**.

### Creating a Question for a Learning Assessment: Procedure

Questions appear in assessment questionnaires to test learners' understanding of course material. It is recommended to create folders to organize the questions to be used in learning assessments.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Workforce Development
   - Functional Area: Questionnaires
   - Task: Manage Question Library
2. In the Manage Questions page, select **Learning Assessments** in the Subscriber field.
3. Click the Plus button to create a folder to organize learning evaluation questions.
4. Click **Create**. The Create Question page opens.
5. Enter the question.
6. Select the question type. Available choices are:
   - Text: Learners enter their responses in a text field.
   - Single Choice: Learners select one response from several.
   - Multiple Choice: Learners can provide one or more answers.
   - No Response: Use this question type when no response is required. You can use it to add instructions or information to the section.

7. Select **Score Question** to use the score from the responses to calculate the score of questionnaires that are configured to be scored. This option is only available for single and multiple choice questions.

8. In the Response section, specify the presentation of the response. Choices vary depending on the question type.
   - Response for the text question: Specify if the response is in either plain text or rich text. Select rich text to let learners use formatting, such as bold and underline. Indicate the minimum and maximum number of characters for the response.
   - Response for a single choice question: Specify whether the responses appear in a list or as radio buttons. You can associate a rating model with the response type. You can add response feedback to single-choice questions.
   - Response for a multiple choice question: Specify whether the responses are presented as check boxes or a choice list. You can set both a minimum and maximum number of required responses. As with single-choice questions, you can associate a rating model with the response type. You can add response feedback to multiple-choice questions.

9. For single-choice and multiple-choice questions, click **Add** to add the question responses.
10. Click **Preview** to see how the question appears in the evaluation questionnaire.
11. In the Status field, select **Active**. A question must be saved as active to be available for selection when creating questionnaires.
12. Click **Save and Close**. Once created, the question is displayed in the list under the selected folder.

Creating a Questionnaire Template for a Learning Assessment:

**Procedure**

Assessment questionnaire templates are required to create assessment questionnaires. All questionnaires are based on templates to promote consistency.

Depending on the desired level of control over questionnaires, you can create a generic, mostly blank template to give users the ability to fully control the questionnaire properties and contents when creating the questionnaire. If more control is desired, you can create templates with limited configuration options available at the questionnaire level.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Workforce Development
   - Functional Area: Questionnaires
   - Task: Manage Questionnaire Templates

2. In the Manage Questionnaire Templates page, select **Learning Assessments** in the Subscriber field.
3. Click **Search** to see existing questionnaire templates for assessments. You can copy the template and edit its content.
4. Click **Create** to create a new questionnaire template. The Create Questionnaire Template page opens.
5. Enter the template name and description.
6. Enter instruction text and help materials (attachments) if desired.
7. Select the option **Allow changes to instructions** if you want to allow the person who requested the assessment to provide additional instructions or notes to learners. These will appear on the questionnaire.
8. Click **Next**.
9. Define the questionnaire properties.
   - **Section Order**: Select **Sequential** to display the sections in the order you specified. Select **Random** to change the section order whenever the questionnaire is accessed.
   - **Section Presentation**: This option controls how the questionnaire uses sections. Select **No Sections** to display all questions within one required section. Select **Stack Regions** to include all sections on one page.
   - **Page Layout**: Select if the questionnaire is displayed on one or two columns.
   - **Maximum Number of Questions per Page**: Enter the maximum number of questions that appear on a page.
   - **Allowed Response Types**: This option identifies the response types that can appear in questionnaires created from the template. Only questions with the selected response types can appear in the questionnaire.
10. **Configure the sections.**
    - **Allow Additional Questions**: This option controls whether authorized users can add questions when creating a questionnaire from the template.
    - **Question Order**: This option controls the default order of questions in a section. Select **Vertical** for questions to appear in the specified order. Select **Random** for question order to change randomly when a user accesses the questionnaire.
    - **Response Order**: This option controls the default order of responses in a section. Select **Vertical** for responses to appear in the specified order. Select **Random** for response order to change randomly when a user accesses the questionnaire.
    - **Required**: Select this option if you want respondents to answer all questions in the section.
    - **New Page**: Select this option if you want to start the section on a new page. A section may fill more than one page, depending on the number of questions specified in the **Maximum Number of Questions per Page** field.
11. **Add questions from the question library or create new questions.** Question properties can be modified from the template creation page. Changing the response type or making a question required/not required only applies to the template being created. If you want to modify other question properties (like the question text or responses), you can create a new version of the question or edit the existing version.
12. **Click Next** to review the template properties and contents.
13. **Click Preview** to see how the questionnaire is presented to learners.
14. In the **Status** field, select **Active**. A questionnaire template must be saved as active to be available for selection when creating questionnaires.
15. **Click Save and Close**. The questionnaire template appears in the template list, in the selected subscriber.

### Creating a Questionnaire for a Learning Assessment: Procedure

Assessment questionnaires contain questions used to test learners' understanding of course material.

1. In the Setup and Maintenance work area, go to the following:
   - **Offering**: Workforce Development
   - **Functional Area**: Questionnaires
   - **Task**: Manage Questionnaires
2. In the Manage Questionnaires page, select **Learning Assessment** in the Subscriber field.
3. **Click Create** to create a new questionnaire. The Create Questionnaire page opens.
4. Enter a questionnaire template ID or name then click Search. All questionnaires are based on templates, which promote consistency. When creating a questionnaire, you must select a template on which to base the
questionnaire. The template can provide default settings, or enforce mandatory requirements such as specific sections and questions that must be in all questionnaires created using the template.

5. Select the questionnaire template from the search results list.

6. Enter the questionnaire name and fill in other basic information fields. Several fields are already filled from the template, but you can modify them for the questionnaire.

7. Enter instruction text and help materials (attachments) if desired.

8. Click Next.

9. Define the questionnaire properties.

   a. Section Order: Select Sequential to display the sections in the order you specified. Select Random to change the section order whenever the questionnaire is accessed.

   b. Section Presentation: This option controls how the questionnaire uses sections. Select No Sections to display all questions within one required section. Select Stack Regions to include all sections on one page.

   c. Page Layout: Select if the questionnaire is displayed on one or two columns.

   d. Maximum Number of Questions per Page: Enter the maximum number of questions that appear on a page.

   e. Allowed Response Types: This option identifies the response types that can appear in questionnaires created from the template. Only questions with the selected response types can appear in the questionnaire.

10. Configure the sections.

    a. Allow Additional Questions: This option controls whether authorized users can add questions in the subscriber application.

    b. Question Order: This option controls the default order of questions in a section. Select Vertical for questions to appear in the specified order. Select Random for question order to change randomly when a user accesses the questionnaire.

    c. Response Order: This option controls the default order of responses in a section. Select Vertical for responses to appear in the specified order. Select Random for response order to change randomly when a user accesses the questionnaire.

    d. Required: Select this option if you want learners to answer all questions in the section.

    e. New Page: Select this option if you want to start the section on a new page. A section may fill more than one page, depending on the number of questions specified in the Maximum Number of Questions per Page field.

11. Add questions from the question library or create new questions. Question properties can be modified from the template creation page. Changing the response type or making a question required/not required only applies to the template being created. If you want to modify other question properties (like the question text or responses), you can create a new version of the question or edit the existing version.

12. Click Next to review the questionnaire properties and contents.

13. Click Preview to see how the questionnaire is presented to learners.

14. In the Status field, select Active. A questionnaire must be saved as active to be available for selection.

15. Click Save and Close. The questionnaire appears in the questionnaire list, in the selected subscriber.

What's the difference between an evaluation and an assessment?

An evaluation is a questionnaire used to capture feedback from learners about the offering that they completed.

An assessment is a questionnaire used to test learners’ understanding of a course material.

Evaluations
Learning Evaluation: Explained

Use evaluations to capture feedback from learners about the offering that they completed. You can use evaluations in self-paced, instructor-led, and blended offerings.

Evaluations are presented to learners in the form of a questionnaire. Learners are automatically taken to the evaluation questionnaire once they complete an offering. In the case of instructor-led training, learners can complete the evaluation questionnaire when they mark the offering as being complete.

To use evaluations in offerings, evaluation questionnaires must first be created. To create a learning evaluation questionnaire, you perform the following tasks:

- Create questions that appear in evaluation questionnaires.
- Create an evaluation questionnaire template. All questionnaires are based on templates to promote consistency.
- Create an evaluation questionnaire.
- Set up default evaluation questionnaire.
- Create an evaluation for an offering.

When you enable an evaluation for an offering, you have two options:

- Use default evaluation: The same evaluation questionnaire is used for all learning content of that delivery type.
- Use another evaluation: You can override the default evaluation questionnaire and associate another questionnaire.

You can configure an evaluation as being required or optional:

- For required evaluations, learners must complete the evaluation questionnaire before the offering is considered complete.
- For optional evaluations, learners are marked as complete after they complete the offering content even though they did not complete the evaluation questionnaire.

You can determine whether an offering has an evaluation and view the results:

- When you are in the Offerings tab of the Learning Catalog, you can filter the list to display offerings that have an evaluation. Click View > Columns then select the Has Evaluation filter.
- When you select an offering in the Offerings tab of the Learning Catalog, go to the Learners info tile. Click Manage Activities. Click the info icon next to the evaluation to check the completion information. In the pop-up window, select View to see learner results.

Using the Default Evaluation Questionnaire for an Offering: Procedure

You can use the default evaluation questionnaire for offerings.

1. In the My Client Groups work area, click Learning.
2. Click Learning Catalog.
3. On the Learning Catalog page, click the Offerings tab.
4. Search for and select an offering.
5. On the offering details page, select the Definition tile and click Edit.
6. Click the Activities tab.
7. Select the Enable evaluation option.
8. Select the Use default evaluation option.
9. Click Preview to see the evaluation questionnaire.
10. Click Save and Close.

Adding an Evaluation Questionnaire to an Offering: Procedure

Prerequisites: Learning evaluation questionnaires must be created.

1. In the My Client Groups work area, click Learning.
2. Click Learning Catalog.
3. On the Learning Catalog page, click the Offerings tab.
4. Search for and select an offering.
5. On the offering details page, select the Definition tile and click Edit.
6. Click the Activities tab.
7. Select the Enable evaluation option.
8. Select the Use another evaluation option.
9. Click Add Evaluation.
10. Search for and select an evaluation questionnaire then click Apply.
11. Click Preview to see the evaluation questionnaire.
12. In the Required for Completion field, select Yes if you want learners to complete the evaluation questionnaire for the offering to be marked as complete. The offering can be marked complete only after the learners complete the evaluation questionnaire.
13. Click Save and Close.

Setting Up a Default Evaluation Questionnaire for an Offering: Procedure

You can set up a default evaluation questionnaire for each type of offering that is, blended, instructor-led, self-paced.

1. In the My Client Groups work area, click Learning.
2. Click Setup.
3. On the Setup page, click the Evaluations tab.
4. Click Edit.
5. Select the Enable evaluation option.
6. Click Add Evaluation.
7. Search for and select an evaluation questionnaire then click Apply.
8. Click Preview to see the evaluation questionnaire.
9. In the Required for Completion field, select Yes if you want learners to complete the evaluation questionnaire for the offering to be marked as complete. The offering can be marked complete only after the learners complete the evaluation questionnaire.
10. Click Save and Close.

Creating a Question for a Learning Evaluation: Procedure

Questions appear in evaluation questionnaires to capture feedback from learners about the offering that they completed.
It is recommended to create folders to organize the questions to be used in learning evaluations.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Workforce Development
   - Functional Area: Questionnaires
   - Task: Manage Question Library

2. In the Manage Questions page, select Learning Evaluation in the Subscriber field.
3. Click the Plus button to create a folder to organize learning evaluation questions.
4. Click Create. The Create Question page opens.
5. Enter the question.
6. Select the question type. Available choices are:
   - Text: Learners enter their responses in a text field.
   - Single Choice: Learners select one response from several.
   - Multiple Choice: Learners can provide one or more answers.
   - No Response: Use this question type when no response is required. You can use it to add instructions or information to the section.
7. Select Score Question to use the score from the responses to calculate the score of questionnaires that are configured to be scored. This option is only available for single and multiple choice questions.
8. In the Response section, specify the presentation of the response. Choices vary depending on the question type.
   - Response for the text question: Specify if the response is in either plain text or rich text. Select rich text to let learners use formatting, such as bold and underline. Indicate the minimum and maximum number of characters for the response.
   - Response for a single choice question: Specify whether the responses appear in a list or as radio buttons. You can associate a rating model with the response type. You can add response feedback to single-choice questions.
   - Response for a multiple choice question: Specify whether the responses are presented as check boxes or a choice list. You can set both a minimum and maximum number of required responses. As with single-choice questions, you can associate a rating model with the response type. You can add response feedback to multiple-choice questions.
9. Specify if attachments can be provided as part of the response.
10. For single-choice and multiple-choice questions, click Add to add the question responses.
11. Click Preview to see how the question appears in the evaluation questionnaire.
12. In the Status field, select Active. A question must be saved as active to be available for selection when creating questionnaires.
13. Click Save and Close. Once created, the question is displayed in the list under the selected folder.

Creating a Questionnaire Template for a Learning Evaluation:
Procedure

Evaluation questionnaire templates are required to create evaluation questionnaires. All questionnaires are based on templates to promote consistency.
Depending on the desired level of control over questionnaires, you can create a generic, mostly blank template to give users the ability to fully control the questionnaire properties and contents when creating the questionnaire. If more control is desired, you can create templates with limited configuration options available at the questionnaire level.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Workforce Development
   - Functional Area: Questionnaires
   - Task: Manage Questionnaire Templates
2. In the Manage Questionnaire Templates page, select Learning Evaluations in the Subscriber field.
3. Click Search to see existing questionnaire templates for evaluations. You can copy the template and edit its content.
4. Click Create to create a new questionnaire template. The Create Questionnaire Template page opens.
5. Enter the template name and description.
6. Enter instruction text and help materials (attachments) if desired.
7. Select the option Allow changes to instructions if you want to allow the person who requested the evaluation to provide additional instructions or notes to learners. These will appear on the questionnaire.
8. Click Next.
9. Define the questionnaire properties.
   - Section Order: Select Sequential to display the sections in the order you specified. Select Random to change the section order whenever the questionnaire is accessed.
   - Section Presentation: This option controls how the questionnaire uses sections. Select No Sections to display all questions within one required section. Select Stack Regions to include all sections on one page.
   - Page Layout: Select if the questionnaire is displayed on one or two columns.
   - Maximum Number of Questions per Page: Enter the maximum number of questions that appear on a page.
   - Allowed Response Types: This option identifies the response types that can appear in questionnaires created from the template. Only questions with the selected response types can appear in the questionnaire.
10. Configure the sections.
    - Allow Additional Questions: This option controls whether authorized users can add questions when creating a questionnaire from the template.
    - Question Order: This option controls the default order of questions in a section. Select Vertical for questions to appear in the specified order. Select Random for question order to change randomly when a user accesses the questionnaire.
    - Response Order: This option controls the default order of responses in a section. Select Vertical for responses to appear in the specified order. Select Random for response order to change randomly when a user accesses the questionnaire.
    - Required: Select this option if you want respondents to answer all questions in the section.
    - New Page: Select this option if you want to start the section on a new page. A section may fill more than one page, depending on the number of questions specified in the Maximum Number of Questions per Page field.
11. Add questions from the question library or create new questions. Question properties can be modified from the template creation page. Changing the response type or making a question required/not required only applies to the template being created. If you want to modify other question properties (like the question text or responses), you can create a new version of the question or edit the existing version.
12. Click Next to review the template properties and contents.
13. Click Preview to see how the questionnaire is presented to learners.
14. In the Status field, select Active. A questionnaire template must be saved as active to be available for selection when creating questionnaires.
15. Click Save and Close. The questionnaire template appears in the template list, in the selected subscriber.
Creating a Questionnaire for a Learning Evaluation: Procedure

Evaluation questionnaires contain questions used to capture feedback from learners about the offering that they completed.

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Workforce Development
   - Functional Area: Questionnaires
   - Task: Manage Questionnaires

2. In the Manage Questionnaires page, select **Learning Evaluation** in the Subscriber field.

3. Click **Create** to create a new questionnaire. The Create Questionnaire page opens.

4. Enter a questionnaire template ID or name then click Search. All questionnaires are based on templates, which promote consistency. When creating a questionnaire, you must select a template on which to base the questionnaire. The template can provide default settings, or enforce mandatory requirements such as specific sections and questions that must be in all questionnaires created using the template.

5. Select the questionnaire template from the search results list.

6. Enter the questionnaire name and fill in other basic information fields. Several fields are already filled from the template, but you can modify them for the questionnaire.

7. Enter instruction text and help materials (attachments) if desired.

8. Click **Next**.

9. Define the questionnaire properties.
   - Section Order: Select Sequential to display the sections in the order you specified. Select Random to change the section order whenever the questionnaire is accessed.
   - Section Presentation: This option controls how the questionnaire uses sections. Select No Sections to display all questions within one required section. Select Stack Regions to include all sections on one page.
   - Page Layout: Select if the questionnaire is displayed on one or two columns.
   - Maximum Number of Questions per Page: Enter the maximum number of questions that appear on a page.
   - Allowed Response Types: This option identifies the response types that can appear in questionnaires created from the template. Only questions with the selected response types can appear in the questionnaire.

10. Configure the sections.
    - Allow Additional Questions: This option controls whether authorized users can add questions in the subscriber application.
    - Question Order: This option controls the default order of questions in a section. Select Vertical for questions to appear in the specified order. Select Random for question order to change randomly when a user accesses the questionnaire.
    - Response Order: This option controls the default order of responses in a section. Select Vertical for responses to appear in the specified order. Select Random for response order to change randomly when a user accesses the questionnaire.
    - Required: Select this option if you want learners to answer all questions in the section.
    - New Page: Select this option if you want to start the section on a new page. A section may fill more than one page, depending on the number of questions specified in the Maximum Number of Questions per Page field.

11. Add questions from the question library or create new questions. Question properties can be modified from the template creation page. Changing the response type or making a question required/not required only applies to the template being created. If you want to modify other question properties (like the question text or responses), you can create a new version of the question or edit the existing version.

12. Click **Next** to review the questionnaire properties and contents.
13. Click **Preview** to see how the questionnaire is presented to learners.
14. In the Status field, select **Active**. A questionnaire must be saved as active to be available for selection.
15. Click **Save and Close**. The questionnaire appears in the questionnaire list, in the selected subscriber.

What's the difference between an evaluation and an assessment?

An evaluation is a questionnaire used to capture feedback from learners about the offering that they completed.

An assessment is a questionnaire used to test learners’ understanding of a course material.

### Learning Outcomes

#### Learning Outcomes: Explained

Learning outcomes are specific skills, qualities, or qualifications that learners acquire when successfully completing a course or specialization. Learning outcomes are displayed to learners on their self-service page.

Learning outcomes are a combination of the following components:

- Content Types
- Content Items
- Rating Models
- Person Profile

The Learning library has predefined content types such as Languages, Competencies, and Licenses and Certifications. When you configure a predefined content type, the content items, rating model, and task flow associated with that content type are also available.

#### Content Types

Content types are the skills, competencies, or qualifications that you add as learning outcomes. You select a predefined content type or you create custom content types and configure them as learning outcomes. Use the **Manage Content Types** task in the Setup and Maintenance work area to create custom content types. Select Learn as the subscriber.

#### Content Items

Content items are the individual qualities or attributes within the content type. You select a content item when you add the content type. For example, within the Competencies content type Leadership is a content item. Use the **Manage Content Items** task in the Setup and Maintenance work area to create content items for the content types.

#### Rating Models

Rating models measure the level of proficiency or skill for the content item. You select a rating model based on the content type you add. For example, choose a rating model that includes reading, writing, and speaking proficiency for the Language content type. Use the **Manage Profile Rating Models** task in the Setup and Maintenance work area to create rating models.
Person Profile
Person profile includes existing profile data such as learner skills, qualifications, and future job preferences. Learners view learning outcomes when they enroll for a course or specialization. They can see the direct benefits to their profile, job, and future job aspirations. When learners complete a course or specialization, their person profiles are automatically updated to reflect the learning outcomes.

Related Topics
- Profile Types
- Content Types
- Content Items
- Rating Models

Content Types for Learning Outcomes: Examples
These examples illustrate how to add and configure predefined content types such as Languages, Competencies, and Certification to an existing course.

Each of the predefined content types contain related fields also called content type properties. You add content types as learning outcomes on the Learning Outcomes tab accessed from the course or specialization page in the Manage Catalog page.

Configuring Competency Content Type
To add the Communication competency to a Marketing Communication course, you select the values shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Communication</td>
<td>Indicates the quality or attribute assessed through the competency.</td>
</tr>
<tr>
<td>Proficiency</td>
<td>Advanced</td>
<td>Indicates the proficiency that is achieved for the competency.</td>
</tr>
</tbody>
</table>

A learner who completes this course acquires Advanced proficiency for the Communication competency.

Configuring Language Content Type
To add the Language competency to the Advanced French Language course, you select the values shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language</td>
<td>French</td>
<td>Indicates the language being assessed through the course.</td>
</tr>
</tbody>
</table>
A learner who completes this course acquires Advanced reading, writing, and speaking proficiency in French. The course doesn’t provide the proficiency to translate or teach.

### Configuring Licenses and Certifications Content Type

To add the Certification competency to the Safety Hazards Recognition Program, you select the values shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Safety Hazards Recognition Program</td>
<td>Indicates the title of the course.</td>
</tr>
<tr>
<td>Renewal Required</td>
<td>Yes</td>
<td>Indicates the certification needs to be renewed one year from the date of completion.</td>
</tr>
<tr>
<td>Renewal in Progress</td>
<td>No</td>
<td>Indicates renewal is not in progress since this is the first time the learner is taking the certification.</td>
</tr>
<tr>
<td>Number</td>
<td>Leave blank</td>
<td>When left blank indicates there is no previous score or credit earned by the learner for this certification.</td>
</tr>
</tbody>
</table>

Learners who complete the certification will see the issue date, expiry date, and renewal date on their profile.

**Related Topics**

- Content Items
- Content Types
How can I find a course or specialization with a specific outcome to assign to a learner?

Use **Search by Learning Outcomes** on the **Manage Catalog** page to find courses or specializations with specific learning outcomes. Type keywords related to the learning outcome to run a **Basic** search. Else, use **Advanced** search to type keywords containing specific attributes or values used in the learning outcome. From the search results, select the course and open the offering details. Use **Manage Learners** to assign the course or specialization to learners.

**Related Topics**
- Adding Learners: Procedure

### Prerequisites

**Learning Prerequisites: Explained**

Learning prerequisites are talent profile items associated to courses or specializations that learners must satisfy before registering to a learning. If prerequisites are not met, learners are prevented from registering into a course or specialization until prerequisites are met.

Examples of prerequisite can be to complete a specific course, to have a specific competency, or to know a specific language.

Specializations can have prerequisites, as can the courses within a specialization. Specialization prerequisites are independent of course prerequisites. For example, Specialization 1 has Prerequisite 1, and contains Course A, which has Prerequisite 2. For the learner to be able to join Specialization 1, he only needs to have obtained Prerequisite 1. However, to start Course A, he must also have obtained Prerequisite 2.

Learners can see prerequisites on the course or specialization details page. They can also see their prerequisite statuses, which can either be achieved or not achieved. When a prerequisite is not achieved, learners cannot start the learning. They can click the Find Learning link to view learning items that are available to fulfill the prerequisite.

### Adding Prerequisites to a Course or Specialization: Explained

You add prerequisites to a course or specialization to require learners to have certain skills or qualifications required to take a particular course or specialization.

Prerequisites, like learning outcomes, are content items. They are configured in Talent Management in the Profiles work area. Administrators can use existing content types, or create custom content types and items. The table presents examples of predefined content types and content items.

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Content Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competencies</td>
<td>Action Oriented</td>
</tr>
</tbody>
</table>
Content types appear as sections in the Prerequisites page, just as they do in talent profiles. Content items appear as items within the sections. Typically, you add prerequisites when creating courses or specializations, but you can also add them later.

> **Note:** The content sections available are based on the configuration of the Talent Management Job Model profile.

### Adding Prerequisites to a Course: Procedure

You add prerequisites to a course to require learners to have certain skills or qualifications required to take a particular course.

1. On the Learning Catalog page, click the Courses tab.
2. In the Search Results section, select a course.
3. Click **Edit**.
4. On the course page, click the Prerequisites tab.
5. Click **Add Content**.
6. Select content item types such as Competencies, Languages, Licenses and Certifications. A section appears for each content item type you selected.
7. Add content items and complete fields associated to them.
8. Click **Save and Close**.

> **Note:** If you add custom content types, the **Required** check box must remain selected for the content type to be displayed to learners. Oracle Learning Cloud only supports required prerequisites. You must select **Required** for both seeded and custom content types. The configuration of the talent management job model profile can be such that the prerequisites are always configured as required during implementation to avoid incorrect configuration when specifying prerequisites.

> **Note:** If you add content items with a rating model, you must provide the minimum rating model. An example of a rating model is the proficiency for a competency, such as beginner, advanced, or expert. Rating models and levels are configurable. The maximum proficiency level is not used for learning prerequisites.
Adding Prerequisites to a Specialization: Procedure

You add prerequisites to a specialization to require learners to have certain qualifications required to take a particular specialization.

1. On the Learning Catalog page, click the Specializations tab.
2. In the Search Results section, select a specialization.
3. Click Edit.
4. On the specialization page, click the Prerequisites tab.
5. Click Add Content.
6. Select content item types such as Competencies, Languages, Licenses and Certifications. A section appears for each content item type you selected.
7. Add content items and complete fields associated to them.
8. Click Save and Close.

Note: If you add custom content types, the Required check box must remain selected for the content type to be displayed to learners. Oracle Learning Cloud only supports required prerequisites.

Note: If you add content items having a rating model, you must provide the minimum rating model. For example, if you add a competency, specify the minimum proficiency (minimum rating level). Do not configure the maximum proficiency because it is currently not used.

Waiving Prerequisites: Explained

The ability to waive prerequisites is an administrator capability that bypasses the prerequisite verification when you create an assignment, or manage existing assignments.

Waiving Prerequisites Once a Course is Assigned: Procedure

You can waive prerequisites once a course has been assigned to a learner.

1. On the Learning Catalog page, click the Courses tab.
2. In the Search Results section, click on a course title.
3. Click on the Learners section on the left.
4. In the Learner Results section, select a learner with the status Pending Prerequisites.
5. On the Change Status menu, select Waive Prerequisites.
6. Click Done.

The learner status is changed to Active and the learner can register for any of the course’s offerings.

Waiving Prerequisites Once a Specialization is Assigned: Procedure

You can waive a prerequisite once a specialization is assigned to a learner.

1. On the Learning Catalog page, click the Specializations tab.
2. In the Search Results section, click on a course title.
3. Click on the Learners section on the left.
4. In the Learner Results section, select a learner with the status Pending Prerequisites.
5. On the **Change Status** menu, select **Waive Prerequisites**.
6. Click **Done**.

The learner status is changed to Active and the learner can register for the specialization.

### Waiving Prerequisites When Assigning a Course: Procedure

You can waive a prerequisite when assigning a course to a learner.

1. On the Learning Catalog page, click the Courses tab.
2. In the Search Results section, click on a course title.
3. Click on the Learners section on the left.
4. In the Learner Results section, click the **Add Learners** menu and select a type of learner (Voluntary, or Require).
5. Complete the fields on the Assignment Details page, then click **Next**.
6. Select learners, then click **Next**.
7. On the Advanced Rules page, select **Waive Prerequisites**.
8. Select a reason for waiving the prerequisites.
9. Optionally, indicate the number of days the assignment is in Pending Prerequisite status before withdrawing learners. For example, if you enter 30, learners have 30 days to obtain the prerequisites for the assignment.
10. Click **Submit**.

The learner status is changed to No Offering Selected (instead of the Pending Prerequisite status).

### Waiving Prerequisites When Assigning a Specialization: Procedure

You can waive a prerequisite when you assign a specialization to a learner.

1. On the Learning Catalog page, click the Specializations tab.
2. In the Search Results section, click on a specialization title.
3. Click on the Learners section on the left.
4. In the Learner Results section, click the **Add Learners** menu and select a type of learner (Voluntary, Require, Recommend).
5. Complete the fields on the Assignment Details page, then click **Next**
6. Select learners, then click **Next**.
7. On the Advanced Rules page, select **Waive Prerequisites**.
8. Select a reason for waiving the prerequisites.
9. Optionally, indicate the number of days the assignment is in Pending Prerequisite status before withdrawing learners. For example, if you enter 30, learners have 30 days to obtain the prerequisites for the assignment.
10. Click **Submit**.

The learner status is changed to No Offering Selected (instead of the Pending Prerequisite status).
Creating a Content Type to Use as Prerequisite or Learning Outcome: Procedure

You can create a content type to use as a prerequisite or learning outcome for a course or specialization. Once the content type is created, it becomes available in the Add Content drop-down list on the Prerequisites tab or Learning Outcomes tab in the Learning Catalog.

To create a content type, complete these tasks:

- Create a content type
- Create a content item
- Add the content type to the content subscriber
- Add the content type to the person profile

Related Topics

- Content Types
- Content Items
- Content Subscribers
- Content Section Properties

Access Control

Access Control: Explained

Use access control rules to define if and how learners can find and sign up for courses, offerings, or specializations. When defining access rules, you decide which catalog items are visible to learners, how much item detail displays in Self-Service, whether learners can sign up directly, or whether they need to request assignment approval. Using access control, you can make learning items available to

- Everyone
- Only certain groups
- Everyone, pending an approval or not

You can define access control rules at the system level (default access rules), per learning item, and per access group.

\[\text{Note:}\] Access control only applies to learning items before you assign them to learners. You can assign a learner to a course, whether the learner has access or not. Once assigned, the access control rules have no effect. Regardless of the access rules set for the course or offering, once assigned, learners are able to see its details and take the training.
Default Access Rules

You can define default access rules at several levels:

- **System Level** - these are global access rules that are pre-selected when administrators create new courses, specializations, and access groups. Changes made later to the system level access rules only impact new learning item or access group rules going forward, and do not impact pre-existing items or groups rules.

- **Item Level** - these are set per learning item, apply to all learners accessing learning items prior to having an assignment for them. A voluntary or required learning assignment on an item always provides full access to it, and bypasses the defined access rules. Additionally, when creating an offering, its default access rules are obtained from its parent course, not the system-wide rules.

- **Access Groups** - these are set for specific groups of learners at the item level.

Default Access Rules Applied to Learning Items

Access rules for individual items copy the parent level, and can be manipulated independently. When you create a new course, the default system level access rules are initially applied to it. If you make changes later to the default system level rules, they do not trickle down to this course. Course level access rules cascade down into new offerings created for a course. You are also given an opportunity to change these rules upon offering creation.

🏷️ Note: Controlling access at the course level is generally sufficient, unless you have a specific need to hide a course’s offerings from learners.

Related Topics

- Learning Assignments: Explained

Access Groups: Explained

Access groups are defined groups of learners with specific access control rules.

There are two kinds of access groups:

- **Named access groups** - Defined, logical groups of learners, based on selection criteria. These groups are evaluated on an ongoing basis (at intervals that were determined during your implementation), and can account for organizational changes and employee movement within the workforce structure. For example, you can define a named access group based on an organization chart group. The access group rules are applied to new people moving into the group, and removed from the people longer in the group.

- **Ad hoc access groups** - A group of learners defined once, and which remains based on the same set of learners as at the time of the group’s creation. You can only manage these groups manually.

Access Group Priorities

You can assign multiple access groups per learning item, and each group can have different rules, and may have overlapping sets of learners. Setting group priority determines the order in which the access group rules are evaluated for a given learner, and which rules apply to them. For example, you have a Sales group as Priority 1, and a US Employees group as priority 2. A person in both groups will have the rules of the Sales group applied, as that is the first priority. A person who is only in the US Employees group has the US Employees group rules applied. Rule evaluation priority also extends to ad hoc access groups, which have the lowest of the priorities and apply only if the person is not included in any named access group.
Access is granted to groups in the following priority order:

- Named access groups, based on their assigned priority
- Ad hoc access groups
- Learning item default access rules

Defining System Level Default Access Rules: Procedure

Define the global access rules that are pre-selected when administrators create new courses, offerings, and specializations. Changes made later to the default access rules only affect new learning items going forward, and do not affect the rules associated with pre-existing items.

1. On the Setup page, click the Learning Item Default Attributes tab.
2. Click Edit.

Learner Defaults

Define the default settings for how learners search for and select learning in Self-Service.

1. Select one of the following for the Self-Service Details View Mode drop-down list:
   - Details View - learners can see all of the details for a course.
   - No Access - learners cannot find the course in the search results. Use this setting if you want to hide the course.
   - Summary View - learners can see a limited view of course details, but can request more information.
2. Define the default settings for what happens when learners request training. Select one of the following for the Created by Learner drop-down list:
   - Active - No approval is needed, and learners can register themselves directly.
   - Requested - Approval is needed before learners can register. When you select this, two additional fields display, and selecting them is optional:
     - Show Learning Request Form - select this if you want to display a form to learners to capture additional information that administrators can use in the approval process.
     - Activate Approved Learner Requests - select this to have the assignment automatically activated after approval is obtained. (Wait lists and prerequisites can affect whether an item actually transitions to active status.)

Note: If you clear this check box, assignments remain in Request Approved status, and require manual activation by an administrator. This check box is useful if you do advanced planning, and you require your staff to request future training that is not yet available. You can leave items in a requested state until you are ready to move forward and activate them.

3. Select the Allow even if required prerequisites are not achieved check box to enable learners to register or request the learning item even if they have not achieved a required prerequisite. The status of the assignment will remain in pending prerequisite status until learners achieve the prerequisite.
4. Enter the number of days assignments are in pending prerequisites status before withdrawing learners. This is the amount of time learners have to achieve the prerequisite before they are removed from the assignment.
Manager Defaults

Define the default settings for what happens when managers assign learning items to their teams.

1. Select one of the following from the Created by Manager drop-down list:
   - **Active** - No approvals needed. Managers’ assignments are activated automatically.
   - **Requested** - Approval is needed when managers request learning for their teams. When you select this, two additional fields display, and selecting them is optional:
     - **Show Learning Request Form** - select this if you want to display a form to managers to capture some information that administrators can use in the approval process.
     - **Activate Approved Learner Requests** - select this to have the assignment automatically activated after approval is obtained. If you do not select this option, assignments remain in Request Approved status, and require manual activation by an administrator. Clearing this check box is useful if you do advanced planning, and you require your staff to request future training that is not yet available.
   - **Request Approved** - select this when you do not want an approval process triggered when assignments are created, and to require that an administrator manually activates the assignments. If you select this option, an additional check box displays:
     - **Show Learning Request Form** - select this check box if you want to display a form to managers to capture additional information that administrators can use in the approval process.

2. Enter the number of days assignments are in pending prerequisites status before withdrawing learners. This is the amount of time learners have to achieve the prerequisite before they are removed from the assignment.

   **Note:** Managers are always allowed to assign training to their team members, even if some of them do not have the required prerequisites.

3. Define the default assignment mode (active or requested) for courses accessed from specializations. This setup value is picked up by specializations by default and can be changed per specialization. Select one of the following from the For Courses in a Specialization drop-down list:
   - **Active** - forces learners to active mode regardless of the configuration on the course itself.
   - **Inherit from Course** - respects the assignment mode defined on the course.
   - **Inherit from Specialization** - forces learners to active or request mode per the specialization configuration regardless of the course configuration.
   - **Requested** - forces learners to request mode regardless of the configuration on the course itself.

4. Click **Save**.

Defining Access Rules at the Learning Item Level: Procedure:

Procedure

You can modify access rule defaults on a per-learning item basis.

**Note:** Any changes you later make to the system level access rules, do not affect the settings you make now at the learning item level.

1. On the Learning Catalog page, click the Offerings, Courses, or Specializations tab, depending on which item type you are looking for.
2. Search for and select the learning item you want.
3. Select the item, and click **Learners**.
4. Select the **Learners** infotile.
5. Click the Access tab.
6. Click **Manage Default Access**.
7. Select one of the following for the **Self-Service Details View Mode** drop-down list:
   - **Details View** - learners can see all of the details for a course.
   - **No Access** - learners cannot find the course in the search results. Use this setting if you want to hide the course.
   - **Summary View** - learners can see a limited view of course details, but can request more information.

   **Note:** Currently, there is no **Details View** option available for offerings.

8. Select one of the following from the **Manager-Created Assignments** drop-down list:
   - **Active** - No approvals needed. Managers’ assignments are activated automatically.
   - **Requested** - Approval is needed when managers request learning for their teams. When you select this, two additional fields display, and selecting them is optional:
     - **Show Learning Request Form** - select this if you want to display a form to managers to capture some information that administrators can use in the approval process.
     - **Activate Manager Approved Requests** - select this to have the assignment automatically activated after approval is obtained. If you do not select this option, assignments remain in Request Approved status, and require manual activation by an administrator. Clearing this check box is useful if you do advanced planning, and you require your staff to request future training that is not yet available.
   - **Request Approved** - select this when you do not want an approval process triggered when assignments are created, and to require that an administrator manually activates the assignments. If you select this option, an additional check box displays:
     - **Show Learning Request Form** - select this check box if you want to display a form to managers to capture additional information that administrators can use in the approval process.

9. Enter the number of days assignments are in pending prerequisites status before withdrawing learners. This is the amount of time learners have to achieve the prerequisite before they are removed from the assignment.

   **Note:** Managers are always allowed to assign training to their team members, even if some of them do not have the required prerequisites.

10. Define the default settings for what happens learners request training. Select one of the following for the **Self-Created Assignments** drop-down list:
    - **Active** - No approval is needed, and learners can register themselves directly.
    - **Requested** - Approval is needed before learners can register. When you select this, two additional fields display, and selecting them is optional:
      - **Show Learning Request Form** - select this if you want to display a form to learners to capture additional information that administrators can use in the approval process.
      - **Activate Approved Learner Requests** - select this to have the assignment automatically activated after approval is obtained. (Wait lists and prerequisites can affect whether an item actually transitions to active status.)
**Note:** If you clear this check box, assignments remain in Request Approved status, and require manual activation by an administrator. This check box is useful if you do advanced planning, and you require your staff to request future training that is not yet available. You can leave items in a requested state until you are ready to move forward and activate them.

11. Select the **Allow even if required prerequisites are not achieved** check box to enable learners to register or request the learning item even if they have not achieved a required prerequisite. The status of the assignment will remain in pending prerequisite status until learners achieve the prerequisite.

12. Enter the number of days assignments are in pending prerequisites status before withdrawing learners. This is the amount of time learners have to achieve the prerequisite before they are removed from the assignment.

13. Click **Save**.

**Creating Named Access Groups: Procedure**

Access groups are defined groups of learners with specific access control rules. Named access groups are logical groups of learners, based on selection criteria. These groups are evaluated on an ongoing basis (at intervals set up during implementation), and can account for organizational changes and employee movement within the workforce structure. For example, you can define a named access group based on an organization chart group. The access group rules are applied to new people moving into the group, and removed from the people no longer in the group.

1. On the Learning Catalog page, click the Offerings, Courses, or Specializations tab, depending on which item type you are looking for.

2. Search for and select the learning item you want.

3. Select the item, and click **Learners**.

4. Select the **Learners** infotile.

5. Click the Access Groups tab.

6. Click **Add**.

7. Type a name and description for the group.

8. Use the **With this note** field to add comments.

9. Select one of the following for the **Self-Service Details View Mode** drop-down list:
   - **Details View** - learners can see all of the details for a course.
   - **No Access** - learners cannot find the course in the search results. Use this setting if you want to hide the course.
   - **Summary View** - learners can see a limited view of course details, but can request more information.

10. Select one of the following from the **Manager-Created Assignments** drop-down list:
   - **Active** - No approvals needed. Managers’ assignments are activated automatically.
   - **Requested** - Approval is needed when managers request learning for their teams. When you select this, two additional fields display, and selecting them is optional:
     - **Show Learning Request Form** - select this if you want to display a form to managers to capture some information that administrators can use in the approval process.
     - **Activate Manager Approved Requests** - select this to have the assignment automatically activated after approval is obtained. If you do not select this option, assignments remain in Request Approved
status, and require manual activation by an administrator. Clearing this check box is useful if you do advanced planning, and you require your staff to request future training that is not yet available.

- **Request Approved** - select this when you do not want an approval process triggered when assignments are created, and to require that an administrator manually activates the assignments. If you select this option, an additional check box displays:
  
  - **Show Learning Request Form** - select this check box if you want to display a form to managers to capture additional information that administrators can use in the approval process.

11. Enter the number of days assignments are in pending prerequisites status before withdrawing learners. This is the amount of time learners have to achieve the prerequisite before they are removed from the assignment.

**Note:** Managers are always allowed to assign training to their team members, even if some of them do not have the required prerequisites.

12. Define the default settings for what happens learners request training. Select one of the following for the **Self-Created Assignments** drop-down list:

- **Active** - No approval is needed, and learners can register themselves directly.

- **Requested** - Approval is needed before learners can register. When you select this, two additional fields display, and selecting them is optional:
  
  - **Show Learning Request Form** - select this if you want to display a form to learners to capture additional information that administrators can use in the approval process.
  
  - **Activate Approved Learner Requests** - select this to have the assignment automatically activated after approval is obtained. (Wait lists and prerequisites can affect whether an item actually transitions to active status.)

**Note:** If you clear this check box, assignments remain in Request Approved status, and require manual activation by an administrator. This check box is useful if you do advanced planning, and you require your staff to request future training that is not yet available. You can leave items in a requested state until you are ready to move forward and activate them.

13. Select the **Allow even if required prerequisites are not achieved** check box to enable learners to register or request the learning item even if they have not achieved a required prerequisite. The status of the assignment will remain in pending prerequisite status until learners achieve the prerequisite.

14. Enter the number of days assignments are in pending prerequisites status before withdrawing learners. This is the amount of time learners have to achieve the prerequisite before they are removed from the assignment.

15. Click **Next**.

16. Select one of the following from the **Select Learners** drop-down list:

- **Using Analysis Report** - search for learners using a pre-defined analysis report.

- **Using Organization Chart Group** - search for learners using an organizational chart group. You can select either a learner’s entire organization or just their direct reports.

- Search and Select Learning Items search for learners based on worker based attributes or learning assignments. When you click **Use Current Criteria**, you can save this particular search for use later.

- **Using Learner Criteria** - search for specific learners using either worker criteria or assignment criteria, such as searching for learners based on the attributes of assignments made to them.

17. Click **Submit**.
Creating Ad Hoc Access Groups: Procedure

Access groups are defined groups of learners with specific access control rules. Ad hoc access groups are defined once, and remain based on the same set of learners as at the time of the group’s creation. You can only manage these groups manually.

1. On the Learning Catalog page, click the Offerings, Courses, or Specializations tab, depending on which item type you are looking for.
2. Search for and select the learning item you want.
3. Select the item, and click Learners.
4. Select the Learners infotile.
5. Click the Access tab.
6. Click Add.
7. Select one of the following for the Self-Service Details View Mode drop-down list:
   - Details View - learners can see all of the details for a course.
   - No Access - learners cannot find the course in the search results. Use this setting if you want to hide the course.
   - Summary View - learners can see a limited view of course details, but can request more information.
8. Select one of the following from the Manager-Created Assignments drop-down list:
   - Active - No approvals needed. Managers’ assignments are activated automatically.
   - Requested - Approval is needed when managers request learning for their teams. When you select this, two additional fields display, and selecting them is optional:
     - Show Learning Request Form - select this if you want to display a form to managers to capture some information that administrators can use in the approval process.
     - Activate Manager Approved Requests - select this to have the assignment automatically activated after approval is obtained. If you do not select this option, assignments remain in Request Approved status, and require manual activation by an administrator. Clearing this check box is useful if you do advanced planning, and you require your staff to request future training that is not yet available.
   - Request Approved - select this when you do not want an approval process triggered when assignments are created, and to require that an administrator manually activates the assignments. If you select this option, an additional check box displays:
     - Show Learning Request Form - select this check box if you want to display a form to managers to capture additional information that administrators can use in the approval process.
9. Enter the number of days assignments are in pending prerequisites status before withdrawing learners. This is the amount of time learners have to achieve the prerequisite before they are removed from the assignment.

Note: Managers are always allowed to assign training to their team members, even if some of them do not have the required prerequisites.

10. Define the default settings for what happens learners request training. Select one of the following for the Self-Created Assignments drop-down list:
    - Active - No approval is needed, and learners can register themselves directly.
Requested - Approval is needed before learners can register. When you select this, two additional fields display, and selecting them is optional:

- **Show Learning Request Form** - select this if you want to display a form to learners to capture additional information that administrators can use in the approval process.
- **Activate Approved Learner Requests** - select this to have the assignment automatically activated after approval is obtained. (Wait lists and prerequisites can affect whether an item actually transitions to active status.)

**Note:** If you clear this check box, assignments remain in Request Approved status, and require manual activation by an administrator. This check box is useful if you do advanced planning, and you require your staff to request future training that is not yet available. You can leave items in a requested state until you are ready to move forward and activate them.

11. Select the **Allow even if required prerequisites are not achieved** check box to enable learners to register or request the learning item even if they have not achieved a required prerequisite. The status of the assignment will remain in pending prerequisite status until learners achieve the prerequisite.

12. Enter the number of days assignments are in pending prerequisites status before withdrawing learners. This is the amount of time learners have to achieve the prerequisite before they are removed from the assignment.

13. Click **Next**.

14. Select one of the following from the **Select Learners** drop-down list.

- **Using Analysis Report** - search for learners using a pre-defined analysis report.
- **Learners** - search for individual learners by name, person number, department, or other criteria.
- **Search and Select Learning Items** - search for learners based on worker based attributes or learning assignments. When you click Use Current Criteria, you can save this particular search for use later.
- **Using Learner Criteria** - search for specific learners using either worker criteria or assignment criteria, such as searching for learners based on the attributes of assignments made to them.

15. Click **Submit**.

### Changing an Access Group's Order: Procedure

You can reorder the priority order for access groups at the learning item level.

1. On the Learning Catalog page, click the Offerings, Courses, or Specializations tab, depending on which item type you are looking for.
2. Search for and select the learning item you want.
3. Select the item, and click **Learners**.
4. Select the Learners infotile.
5. Click the Access Groups tab.
6. Click **Manage Group Priority**.
7. Change the priority of the groups.
8. Click **Save**.
FAQs for Access Control

**How do I know who has access to a learning item?**
Search for and select the learning item you want. Click **Learners**, and then click the Learners infotile. Click the Access tab. A list of learners, their access groups, and their access level displays in the Search Results area. If no learners display, it means that there are no ad hoc access groups or named access groups, and therefore the item’s default access rules are applied to everyone.

**Why would I want to keep an offering in an overbooked state?**
You can leave an offering in an overbooked state if you know that you will eventually withdraw or move active learners to the waitlist. This keeps the offering at maximum capacity, and prevents other learners from joining, or the waitlist from automatically filling empty seats. Another reason to leave it overbooked is if you know you will later change the venue to one that can accommodate a larger audience (meaning you will activate learners, then increase the maximum capacity to fit the number of booked seats).

**What happens if I add the same learner to multiple access groups for the same learning item?**
To resolve conflicting rules between named access groups, each group has a priority defined. This determines the priority in which the rules are evaluated for a given person to determine which rules will apply for them. For example, you have a sales group as priority 1 and a US employees group as priority 2. A person in both groups will have the rules of the sales group applied, as that is the first priority, whereas a person only in the US employees group would get the rules of that group applied. Rule evaluation priority also extends to ad hoc access groups, which have the lowest of the priorities and apply only if the person is not included in any named access group.

**Waitlists**

**Waitlists: Explained**
Use waitlists to enable learners to self-register for, or managers to assign learners to offerings that are already at maximum capacity. You can use waitlists for any type of offering (instructor-led, self-paced, and blended) in which space is limited. For example, instructor-led offerings may have limitations on seats in a physical classroom. Self-paced offerings may have limited licenses available.

When an offering reaches maximum capacity, any newly registered or assigned learners are added to the waitlist on a first in, first out basis. When space becomes available, either because maximum capacity is raised, or learners are removed from the offering, the learners at the top of the waitlist are added to the offering until maximum capacity is again reached.

Capacity rules apply only on offerings. Administrators can define default values for the capacity settings on the Default Offering Attributes tab for the parent course. The default offering settings apply to all offerings within a course, but can also be overridden per offering if needed.
Enabling a Waitlist for an Offering

To enable a waitlist for any offering, select the Capacity Rules check box on the create or edit offering pages, and enter the maximum number of people who can be enrolled in the offering in the Maximum Capacity field. Use the Waitlist Rules check box to control how learners and managers interact with offerings at the self-service level:

- Select the Waitlist Rules check box if you want to allow learners to join the waitlist or request to join if the offering is at maximum capacity. If the offering requires approval, the current capacity is verified after the approval is obtained to determine if the learner is assigned, or added to the waitlist. Managers can assign the offering to learners until it has reached maximum capacity, and any additional learners are added to the waitlist.
- Clear the Waitlist Rules check box to prevent learners from joining or requesting to join the offering if the offering has reached maximum capacity. Managers can only assign the offering to their teams if there is a sufficient number of seats for all intended assignment recipients.

Modifying Capacity and Waitlist Rules

You can change the capacity settings for an offering at any time. When you do, the waitlisted and active assignments update to adhere to the new settings.

- If you clear the Capacity Rules check box to disable capacity rules, all waitlisted learners are added to the offering.
- If you increase the maximum capacity setting, waitlisted learners are added to the offering based on their position on the waitlist, until the new maximum capacity is reached.
- If you decrease the maximum capacity, the offering enters an overbooked state. You can manually withdraw learners, or move some assigned learners to the waitlist to resolve the overbooked state.

Note: You can leave an offering in an overbooked state if you know that you will eventually withdraw or move active learners to the waitlist. This keeps the offering at maximum capacity, and prevents other learners from joining, or the waitlist from automatically filling empty seats.

Overriding the Capacity Rules at the Assignment Level

As an Administrator, you can override capacity settings while creating offering assignments. In the Advanced Rules section, select the Increase maximum capacity and bypass waitlist check box. This increases the offering's maximum capacity to fit all of the intended recipients of the assignment you are creating. It also bypasses learners on the waitlist with the newly assigned learners. Learners already on the waitlist remain there. If you do not select this option, seats fill to capacity with some of the selected learners. All remaining learners move to the waitlist.

Manually Managing the Waitlist for Learning Assignments

You can manually manage the learners who are on the waitlist. On the Learning Assignments tab of the Learners page, use the Assignment Status and Learning Item drop-down lists to search for learners who are waitlisted for a particular offering. You can then:

- Move a learner with an active assignment to the waitlist. This releases a seat, and the first learner on the waitlist is added as active to the offering.
- Activate a learner on the waitlist. When you do this, you are prompted to also increase the maximum capacity. You can say no and put the offering in an overbooked state if you want to prevent other learners from joining the offering.
Self-Service

Learners who are on waitlists can see their status, and their position on the waitlist in the self-service application in two places:

- Requested Learning page
- Course Details page > Actions > View All Offerings

Approvals

Learning Approvals: Explained

Use approvals to require signoff by other people, such as a manager or HR representative, before learners begin using certain learning items. For example, you may want learners to obtain manager approval before taking certain courses.

Oracle Learning Cloud has three Human Capital Management approval transactions:

- Learning Item Contribution Approval - use this transaction to require approvals when a learner contributes self-service learning items to the catalog, such as videos or tutorials. This enables you to approve items before they become available to other learners in the catalog.
- Learning Request Approval - use this transaction in conjunction with the Access Control feature to require approvals before learners can begin using requested learning items.
- Learning Assignment Withdraw Approval - use this transaction to require approvals before learners can withdraw from a course, offering, and specialization assignment.

When you create approval policies for these transactions, you first define the workflow conditions, which are the rules that must be met before an approval routing path is selected. You then define the approval routing path, which is the list of people who approve or deny the request. You can define one person or several people. For example, a manager approves a request, then it moves two levels up in the management hierarchy, and then to an HR manager, or a specific user higher up in your business hierarchy.

You can also create more than one rule for a transaction. The approval routing path taken depends on the rule conditions that are met. For example, you can configure a rule that examines the monetary value entered in a course request form, and routes the approval to different people based on the currency or price. If a learner requests approval for a course that is less than $500, the approval follows the rules defined for a simple workflow, which may just require approval from the learner’s manager. If the course is greater than $500, the approval follows the rules for a different workflow, which may involve obtaining signoff from multiple people, including the learner’s manager, an HR representative, and a director. You can define approval policies using the tasks Manage Approval Transactions for Human Capital Management and Manage Task Configurations for Human Capital Management.

Recommended Reading

Refer to Document ID 2518274.1 on support.oracle.com for an assignment status diagram, which details the workflow of an assignment, and status definitions.

Related Topics

- Defining Approvals for Human Capital Management: Explained
- Defining an HCM Approval Policy: Worked Example
Communities

Learning Communities: Overview

A learning community is a place where learning can be grouped around a particular topic or area of interest and shared or assigned to a distinct set of people known as the community members. The purpose of a community can range from collaborative communities created by employees or managers, to a more formal learning community with assignments.

A few examples of using the community are:

- A department head can create a community for the whole organization to help members acquire knowledge and focus on specific areas.
- A learning specialist can create a learning program and assign the learning item to members with a specific role and job.
- Domain experts can make the community a central place to distribute the latest learning items and participate in discussions related to their areas of expertise.
- Team leaders can enable the team to publish their insights and exchange interesting work-related articles, videos, and tutorials in a community.

As a community owner, you can establish your own brand and identity. You can give frequent updates or schedule periodic updates in your community. You can enable members to create and publish learning items. This is a more purposeful way to gather and share insights with each other. Curate your learning items and engage your community members. A community catalog can have any kind of learning items such as, offering, course, specialization, video, or a tutorial.

Learning communities contain a catalog of learning items, community members, and optionally you can create assignments.

Communities are mainly classified into two categories:

- Catalog Communities: Created and managed by learning administrators
- Self-Service Communities: created and managed by employees or managers. You can configure which employees, if any, have the ability to create self-service communities and which ones can leverage community assignments.

Catalog Communities

As a learning administrator, you can create and manage catalog communities in the Administrator work area from the Learning Catalog page Communities tab if you are granted the privileges. The catalog communities for which you have access will appear here. Self-service communities, even those you may be a member or a manager, will not appear here.

Self-Service Communities

Learners and managers have the ability to create and manage their own learning communities. However, even if they don’t have a community to manage, they can still participate in learning communities, created by other people, as members or managers.
Community Membership
Communities have three access levels controlling how the user can engage with the community:

- Community Manager: Allows you to manage the community catalog and membership. Additionally, distinct privileges control the ability to manage required members.
- Voluntary Member: Allows you to access the community’s learning catalog and discussion forum.
- Required Member: Allows you to access the community’s learning catalog and discussion forum. Additionally you receive assignments created within the community.

Community Catalog
The community catalog is where community managers can add learning items for the easy access of their community members. You can add any type of learning item to the catalog, including courses, specializations, videos, and tutorials. Additionally, as a manager of a community, you can publish self-service videos and tutorials on behalf of the community. You can add these items as though they were published by the community and not as an individual. In the community settings, community managers can enable the option for nonmanagers to contribute to the community catalog. (Voluntary members and Required members can search for and add learning items into the community catalog.)

Community Assignments
Community managers can create and manage required learning assignments on behalf of the community. When such assignments are created, only the required members of the community receive them. The community manager requires a distinct privilege to use this feature of the community, but when granted, it gives them the authority on the required members of that community regardless who added them. You can manage assignments within the community itself. If you are a learning administrator, you can manage the assignments in the Administrator work area similar to all other assignments. The required members can access their assignments directly from within the community itself, and also from their My Learning and Current Learning pages similar to all other assignments. Lastly, when the community creates community assignments, you can configure them in such a way that only the current required members receive them or you can include future required members, who are added to the community automatically.

My Learning Communities: Explained
On the My Learning page, Communities content area you can view and track the communities you manage and communities in which you are a member. Your communities are listed as cards in the following categories:

- Communities Managed: The communities you manage.
- Communities Pending Join: The communities where your join request is waiting for approval by the community manager.
- Communities Joined: The communities in which you are a member.

Communities with the latest activity or notifications are prioritized and listed first. Communities that are pending approval are ordered based on the join request date starting with the earliest one.

On each community card, the following key information is displayed:

<table>
<thead>
<tr>
<th>Community Card Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Name</td>
<td>Name to represent the community</td>
</tr>
</tbody>
</table>
### Community Card Information | Description
---|---
Branding Image | An image that signifies your community
Number of member requests | Drill down from here to the community Membership content area and review the membership requests.
Number of newly published learning items | Drill down to the community Catalog content area and view the items.
The learning type icon | Indicates if the learning item is a video or tutorial
<Days> added | Number of days since the item was added to the community

> **Note:** The wrench icon on a community card indicates that you manage the community.

You can click the card to open the Community Details page and perform your community tasks.

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## Manage Learning Communities in Learning Administrator Work Area: Explained

To facilitate the administrative work, as a learning administrator, you can manage your learning communities in the Administrator work area itself. In the Learning Catalog page, Communities tab, you can search for communities and view community member and assignment details.

Use the following readily available Saved Searches and review details in search results:

- Open Communities
- Recently Created Communities
- Communities with New Assignments
- Communities with Overdue Assignments

You can drill down from the community to the community details page and manage your community.

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## Managing a Community Catalog: Points to Consider

The community catalog stores and maintains learning items for a community. On each learning item card, you can view the item name, learning type icon, contributor name, and the number of likes.

Community members can drill down from the learning item card to the learning item details page and start learning.

### Community Member Contributions

When member contributions are enabled for the community, any member of the community can search for existing learning items to add to the community. They can search all learning items: tutorials, courses, specializations, videos, and add these learning items to the community. They can also search for learning items within other communities that they are members
of, and add these learning items to the community. They can also create videos and tutorials and add them directly to the community catalog.

The person who creates the learning item is the contributor. When a community manager creates and publishes a video or tutorial, the community name appears as the contributor on the learning item.

When member contributions aren’t enabled, only a community manager can add learning items to the community catalog.

In maintaining the catalog, the community manager can remove or delete learning items from the community catalog.

If community managers are also administrators, they can associate courses and specializations directly from the Learning Catalog. When editing a course or specialization, there is a Community infotile available that will allow administrators to associate a community to the course or specialization. Once associated, the course or specialization is added as a catalog item to the communities that were associated to the course or specialization.

**Related Topics**

- Authoring a Tutorial: Worked Example
- Publishing a Video: Procedure

**Creating a Learning Community: Procedure**

You can create a learning community from the My Learning page.

1. From the Home page, select About Me and then Learning.
2. Click the My Learning tab and then click Create Community in the My Learning page.
3. Click Add Image and upload an image that works as a branding image for the community.
4. Enter the title and description of your community.
5. You can specify a video that works as a trailer to advertise your community.
6. Select the privacy option for your community:
   - An Open community enables any learner to search for the community, view its learning catalog, and join the community.
   - A Closed community enables any learner to search for the community, but not view the learning items. You can request to join and view the catalog.
   - A Secret community is accessible to only members and managers from My Learning page Communities content area. Secret communities can’t be searched.

   ✍️ Note: You can always modify the settings of your community later.

7. For member contributions, select one of the following options:
   - **Enabled**: All the community members can publish learning items in the community.
   - **Disabled**: Only the community managers can publish learning items in the community.
8. Click Submit.

The new community is listed in the Communities Managed region of the My Learning page. Although, as the creator, you become the default community manager, you can add other managers on the Community Details page, in the Membership content area.
Managing Community Membership: Points to Consider

On the Community Details page, Membership content area, community managers can track the community membership details. Search for members by their name, role, membership status, or by the person who added members to the community.

A community comprises the community manager, required members, and members. Multiple managers can exist in a community to share and delegate the work. If the manager is also a required member of the community, then he or she will receive the required assignments.

Membership Role

As a community manager, you can:

- Add and remove required or voluntary members to an open or closed community. Required members receive required assignments, which must be completed before the specified date.
- Approve and decline member requests on closed communities.
- Change community members to required community members, if they are your team members or people in your area of responsibility.
- Add existing members and required members as community managers.
- Add nonmembers as community managers. The application also includes them as regular members of the community.

Note: You can verify the role changes in the Membership content area.

Members can leave the community voluntarily at any time, where as the required members can’t leave the community on their own.

Community managers can leave a community voluntarily, unless they are also required members.

Changing Community Member Roles: Points to Consider

As a community manager, you can change the membership role from member to required member and required member to member.

Changing Member to Required Member

When you can change a member to required member, the member must be your subordinate or in your area of responsibility. They receive all the required assignments from the community.

Changing Required Member to Member

When you can change any required member to a member, the member must be your subordinate or in your area of responsibility. The incomplete required assignments are withdrawn from the members.

Adding Manager Role

You can add an existing member or required member as a community manager to manage the community catalog, membership, and assignments. You can add nonmembers as community managers.
Note: A community must have at least one manager. The last manager can’t leave the community till you get another manager.

FAQs for Learning Communities

Where can I view my recommended communities?
My community recommendations are tracked in the Recommendations content area of the My Learning page. Whereas communities recommended to me appear in the Current Learning page.

Who can recommend a learning community?
The community member, community manager, and nonmember can recommend a community. Only secret communities can’t be recommended.

How does a closed community appears for a nonmember?
The community shows only the branding image, trailer, and the community description. You will find the Join button to send your join request.
You can’t view the learning items and community conversations. To join the community, the community manager must approve the joining request and add you as a member.

What happens after I join a community?
Joining open communities is immediate whereas joining closed communities requires the community manager’s approval.
On becoming a member of a community, the community appears in the My Communities content area. You can view the community catalog or join the social conversations. You will receive required learning assignments, if any.

Who can view learning items in a community catalog?
If your community is open, everyone can view it. Only members can view the learning items in a closed community or a secret community.

What happens if I change the privacy setting of a community?
You can change the privacy setting of a community from open to closed and closed to open. The change impact is as follows:

When you change a closed community to open:
- Everyone can view the community.
- All the pending join requests to the community are automatically approved and the learners who requested to join the community are added as members.

Note: You can’t reopen requests that were earlier rejected, but you can try joining the open community again.
- Anyone can now view the community catalog.

When you change an open community to closed, anyone can search and find the community but only community members can view the community details.
Secret communities are similar to closed communities but can't be searched. Only the members and community managers can access the community.

Can a community manager change the membership role between member and required member?
Yes, if the community manager has the data security privileges on the community member.

What's the difference between removing and deleting a learning item in the community catalog?
Both actions remove the learning item from the community catalog.
After removing a learning item, you can still search for it, for example on the Current Learning page. However, deleting removes the learning item from the application completely.
Deletion requires confirmation to ensure you don’t eliminate learning items by mistake.
Community managers can remove any learning item from the catalog. However, they can't delete learning items published by the community. However community members can only remove learning items they added.

What happens if a community manager removes a required member?
You will no longer find this community listed as your community in the My Learning page Communities content area. All the incomplete community assignments are withdrawn for the person.

How can I remove the community manager role for this member?
From the community Membership content area Member Results table select the person and click Manager Role. Deselect the Community Manager check box in the Change Manager Role window.

Learning Catalog FAQs

How can I view a classroom's details and schedule?
On the Catalog Resources page, click the Classroom tab. Select the classroom, and then click Edit. The Edit Resource page opens displaying both the classroom details and classroom schedule. The classroom schedule shows all of the activities that the classroom is associated with, including the date and time of these activities. You can use the filter in this section to refine the list of activities that displays.

How can I see what offerings an instructor is associated with?
On the Catalog Resources page, click the Instructor tab. Select the instructor, and then click Edit. The Edit Instructor page opens displaying both the instructor details and the offerings taught. The Offerings Taught section shows all of the activities that the instructor is associated with, including the date and time of these activities. You can use the filter in this section to refine the list of activities that displays.
How can I check the status of uploaded content?

You can check the status of uploaded learning content by using the search filters on the Catalog Resources page. You can search by keywords, status, and author. Changing the status to All may help you to find newly uploaded content, because it may take some time for content to process before it changes to active status.
4 Managing Contextual Learning

Contextual Learning in Application Pages: Explained

Edit the application pages to embed learning items that enhance application work flows. The Learning resource catalog components enable you to present learning items that are relevant to the business workflow.

Navigate to the Learning resource catalog components using the Page Composer, select View menu>Source>Add > Add Content>Learning Management folder:

- Learning Association Component
- Learning Showcase Component
- Voluntary Assignment Component
- Required Assignment Component

Learning Association Component

Use the Learning Association component to associate learning items with a business object or page context in the application. The Learning Showcase and Assignment components leverage the Association component and presents the learning items.

The following graphic indicates the roles and the task they perform with the Association component:

The administrator adds the component to a specific place of the application page. For example, an application page in profile management (Job Role Details) and sets its context and size using the Page Composer, through expression language.
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Using Learning  

Managing Contextual Learning  

Chapter 4

parameters. This is a one-time task. Then the component will surface in all instances of the profile management page. All Job Roles will have the Association component embedded in it.

The learning specialist will then use this component in the application page to specify the learning items and how they must be presented to the learner in the context of that specific business object.

The learner will then view the learning items which appear in the business context from a different page in the self service. For example, by adding the Learning Showcase Component to the Job Roles self-service page, learning items relevant for a particular role appear in My Account > User Details page Roles region.

Learning Showcase Component

The Showcase component enables the display of one or more learning items in various presentation formats. You can configure the component in such a way that it only displays learning items relevant to a particular application page. For example, the component shows learning items related to a specific business object type such as a job profile inside the job profile description page of employee’s self service. You can configure the look and feel of this component. Learning items are made available to a learner as cards in a swim lane with each learning item displaying the title, contributor name, duration, number of views and so on.

The Learning Showcase component can use the Learning Association component as a potential source of learning activities or learning outcomes, if the page where the component is added contains sufficient reference to a Profile Item such as Competencies or Licenses and Certificates.

Voluntary Assignment Component

The Voluntary Assignment component enables the user of a specific application page (when tied to a business process or a specific business object) to create voluntary learning assignments for self or someone else. The assignment is then saved in the database directly from this page without navigating away from the page. Moreover, the database keeps the context of the business object and the business process for future potential reporting. For example, you can add learning items relevant to Planning and Organizing goals and associate them to the Performance Review page in the HCM application. The application creates assignments for employees and they start learning from the performance review process.

Use the assignment component to enable the learner to search for learning items from different sources, from the entire learning catalog or only from the learning items that are specific to a context using the Association component or Learning Outcomes.

Required Assignment Component

The Required Assignment component works in the same way as the Voluntary Assignment component, excepting:

- Assignment type is required
- You can bind the business process page with validation actions such as Submit or Save to the completion of the learning items

For example you can prevent employees or managers to start on the compensation review process until they complete a specific learning item. The Save or Submit buttons can be dimmed.
Configuring Learning Showcase Component: Points to Consider

Use the Learning Showcase component to display one or more learning items in various presentation formats. Using the Page Composer, go to the page where the component is added and click the gear wheel in the Showcase component and configure the style and context options.

Style

Not only can you embed the learning items to an application page, you can define and configure the style options to present the learning items to the learner:

- Showcase Styles
- Attributes to Show
- Sort Options
- Cover Art Handling

Showcase Styles

Use one of the following showcase styles to present learning items in the showcase component:

<table>
<thead>
<tr>
<th>Showcase Styles</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Item</td>
<td>Displays a single learning item.</td>
</tr>
<tr>
<td>Single Thumbnail</td>
<td>Displays a single thumbnail picture of the learning item.</td>
</tr>
<tr>
<td>Single Card</td>
<td>Displays a single learning item as a card.</td>
</tr>
<tr>
<td>Items List</td>
<td>Displays multiple learning items in a list format.</td>
</tr>
<tr>
<td>Cards Swim Lane</td>
<td>Displays multiple card learning items in a swim lane in a horizontal view with back and next page buttons.</td>
</tr>
<tr>
<td>Swim Lane</td>
<td>Displays multiple learning items in a swim lane in a horizontal view with the back and next page buttons.</td>
</tr>
</tbody>
</table>

Note: When multiple learning items exist, opt for the Enable scrolling option. If you don’t opt for scrolling, the component displays as many learning items as can fit in the space available.
Attributes to Show
Depending on the selection of showcase styles, you can specify which of the following attributes is available to learners when viewing the learning items:

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thumbnail</td>
<td>Shows the smaller version of the video or tutorial</td>
</tr>
<tr>
<td>Title</td>
<td>Shows the title of the learning item as an overlay</td>
</tr>
<tr>
<td>Action button</td>
<td>Includes an action button so that learners can start, resume, evaluate, or restart viewing the learning item</td>
</tr>
<tr>
<td>Learning item type icon</td>
<td>Shows the learning type icon on the learning item, for example an arrow is for a video</td>
</tr>
<tr>
<td>Contributor</td>
<td>Shows the name of the person who contributed the learning item</td>
</tr>
<tr>
<td>Number of views</td>
<td>Shows the number of times the learning item was viewed</td>
</tr>
<tr>
<td>Duration</td>
<td>Shows the duration required to view the learning item</td>
</tr>
</tbody>
</table>

Cover Art Handling
For learning items that have cover art, based on the image used, you can set it to the following options:

- Zoom: Scales the image proportionally to fit in the component region by cropping. May result in a border at the top and bottom or sides depending on the original image size.
- Full: Scales the image proportionally to fit in the component region without cropping.

Tip: Preview the learning items according to the defined style options before you make it available to the learner.

Set the sorting order of the learning items in the component. You can sort by any one of the following options:

- Featured Learning: Sorts learning items that are marked as Featured in the Association component
- Most Recent: Sorts learning items that are published recently
- Most Liked: Sorts learning items by the most number of likes
- Most Viewed: Sorts learning items that are most viewed

You can have a requirements checklist and accordingly specify the options when configuring the component.

Page Context
Set the context of the page where you embed the learning items by specifying the Source Type and Source ID. Learning items associated with this source are automatically listed in the component. When the associated learning item doesn’t exist, the page to which the component is added will not show any learning items.
Configuring Learning Assignment Component Options: Points to Consider

Use the learning assignment component to enable self-service users to create learning assignments in the context of another HCM process. For example, the project implementation team can configure an assignment component on the Job Details page for the learner, manager, or learning administrator. This option allows self-service users to manage their learning assignments and browsing in the catalog without having to leave the page in which they are working. Page users can search in the catalog, add one or more items as assignments and save the page of the current business process.

You can configure the component on its style, the assignment options and the available learning items. Page action bindings are also available for required learning assignments to avoid employees to carry on with a business process before they can actually complete a specific learning item. The Voluntary Learning Assignment and Required Learning Assignment Components work differently, and the differences in setup are highlighted in this topic.

Style

As well as embedding the learning assignment to an application page, you can also define and configure the following style options to present the learning items to the learner:

- Assignment Styles
- Attributes to show
- Sort options
- Cover art handling

Use one of the following showcase styles in the table below to present learning items in the assignment component:

<table>
<thead>
<tr>
<th>Assignment Styles</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single item (Only for Voluntary Assignments Components)</td>
<td>Displays a single learning assignment in a list.</td>
</tr>
<tr>
<td>Single Thumbnail (Only for Voluntary Assignments Components)</td>
<td>Displays a single thumbnail picture of the learning assignment.</td>
</tr>
<tr>
<td>Single Card (Only for Voluntary Assignments Components)</td>
<td>Displays a single learning assignment as a card.</td>
</tr>
<tr>
<td>Items List</td>
<td>Displays multiple learning assignments in a list format.</td>
</tr>
<tr>
<td>Cards Swim Lane</td>
<td>Displays multiple card learning assignments in a swim lane in a horizontal view with back and next page buttons.</td>
</tr>
<tr>
<td>Swim Lane (Only for Voluntary Assignments Components)</td>
<td>Displays multiple learning assignments in a swim lane in a horizontal view with the back and next page buttons.</td>
</tr>
</tbody>
</table>
Note: When multiple learning assignments exist, opt for the Enable scrolling option. If you don’t opt for scrolling, the component displays as many learning items as can fit in the space available.

Depending on the selection of assignment styles, you can specify which of the following attributes is available to learners when viewing the learning items:

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thumbnail</td>
<td>Shows the smaller version of the video or tutorial.</td>
</tr>
<tr>
<td>Title</td>
<td>Shows the title of the learning item as an overlay.</td>
</tr>
<tr>
<td>Action button</td>
<td>Includes an action button so that learners can start, resume, evaluate, or restart viewing the learning item.</td>
</tr>
<tr>
<td>Learning item type icon</td>
<td>Shows the learning type icon on the learning item, for example an arrow is for a video.</td>
</tr>
<tr>
<td>Duration</td>
<td>Shows the duration required to view the learning item.</td>
</tr>
<tr>
<td>Due in Days (Required assignment component only)</td>
<td>Shows for Required Assignment Component only. Displays the time remaining before the assignment is overdue.</td>
</tr>
</tbody>
</table>

For learning items that include cover art, based on the image used, you can set it to the following options:

- **Zoom**: Scales the image proportionally to fit in the component region by cropping. May result in a border at the top and bottom or sides depending on the original image size.
- **Full**: Scales the image proportionally to fit in the component region without cropping.

Tip: Preview the learning items according to the defined style options before you make it available to the learner.

**Learning Assignment**

Set up various parameters about the assignments that the employee can add and save by using the page.

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>State of new assignment</td>
<td>Determines if the newly created assignments become active when saving the page or if they have to go through the request process (triggering the approval workflows).</td>
</tr>
<tr>
<td>Assigned to</td>
<td>Determines if the person to whom the selected learning items are assigned is the current page user or another type of person (the person using the page for someone else or the person concerned by the process might be different people). You can designate the assignee through expression language.</td>
</tr>
<tr>
<td>Assign as</td>
<td>Determines if the person triggering the assignment is the page user, or another user designated through expression language or if the assigner is designated by a pre-defined descriptive value.</td>
</tr>
</tbody>
</table>
## Options

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due in (required assignment component only)</td>
<td>For required assignment component only. Defaults the due date by a number of specified days after the assignment is created and saved.</td>
</tr>
<tr>
<td>Default comment (required assignment component only)</td>
<td>For required assignment component only. Defaults the assignment comment after the assignment is created and saved.</td>
</tr>
<tr>
<td>Context Source Type</td>
<td>Determines the database reference where the context of the business process or object is saved.</td>
</tr>
<tr>
<td>Context Source ID</td>
<td>Determines the ID parameter binding the assignments and the learning assignment.</td>
</tr>
<tr>
<td>Include withdrawn assignments</td>
<td>Determines if the assignments created in the context of the business process or business object which have been withdrawn, will still display.</td>
</tr>
</tbody>
</table>

## Learning Item Selection

Configure the array of learning activities the end user can select when creating assignments. Enable the user to select from the whole catalog or from a specific contextual or fixed selection of learning items.

<table>
<thead>
<tr>
<th>Selection Restriction</th>
<th>Description</th>
<th>Sub Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select any Learning Item in the Catalog (Voluntary Assignment Component only)</td>
<td>The component indicates to the page user creating a learning assignment that they can select any learning item from the catalog, even using a saved search.</td>
<td>NA</td>
<td>End user can search the global catalog of learning items to create learning assignments.</td>
</tr>
<tr>
<td>Select Featured Learning Items Associated With Page Context (Voluntary Assignment Component only)</td>
<td>The component leverages the association component which associates learning items with a specific business object.</td>
<td>Source Type</td>
<td>Database link to where the source type from the association component is stored.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Source ID</td>
<td>Binding parameter ID picks up the correct ID of the business object. Associate learning items to the business object using the association component. Only learning items associated with the business object are searchable by page user to create an assignment.</td>
</tr>
<tr>
<td>Select Featured Learning Items Associated with Learning Outcomes (Voluntary Assignment Component only)</td>
<td>The component leverages the learning outcomes as a source to display learning items. Learning items associated with profile items that exist in the page will display.</td>
<td>Outcome Source</td>
<td>Determines if the learning outcome is designated through a profile item ID, content item ID or learning outcome name.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Object ID</td>
<td>Binding Parameter dynamically selects the correct ID of the learning outcome. Associate the learning items to the learning outcome through the learning outcome functionality. Only learning items associated with the learning outcome will display.</td>
</tr>
</tbody>
</table>
Page Integration (Required Assignment Component)

This tab allows you to bind an action button of the page process you modify. You configure the page action button to appear inactive until the learner completes specifically designated learning items.

### Parameter | Description
--- | ---
Satisfied Assignment Requirements | This gives you the identifier of the component current. Copy and paste this parameter in the activation condition of the button of your choice. It joins the activation of the button to the completion of all the assignments of all learning preselected in this component.

Dependant page component IDs | Copy and paste the identification code of one or several buttons that should remain locked until the assignments are complete. Find the IDs of these buttons through page composer or page source code. The button identification can change from one page to another.

Adding and Configuring Learning Components to Job Roles: Worked Example

The goal is to embed learning items relevant to the application context in an application page. This example comprises the following tasks in embedding learning relevant to a job role:

- Adding and Configuring Learning Association Component
- Adding and Configuring Learning Showcase Component
- Adding Learning Items to Learning Association Component
- Viewing Learning Items in Application Context

The administrator adds the learning components to the page using Page Composer, the learning specialist adds learning items to the component, and the learner can view the learning items in context to the application page he is viewing and sees the learning items.

Adding and Configuring Learning Association Component

1. Sign in to the application as a user with configuration privileges
2. On the Home page, click My Workforce then Profiles. In the Tasks tab, select Manage Model Profiles.
3. Search for model profiles and select one to edit the profile in the Job Profile page.
4. In the Setting and Actions menu, select Structure Pages.
5. In the Structure Pages window, select the level: Site, HCMCountry, or HCMOrganization, at which you want to add the learning.
6. From the View menu select Source.
7. When you click on the region to configure, the Confirm Task Flow Edit window appears. Click Edit.
8. Select the region of the page where you want to add the component. Click Add Content. The selected region is highlighted in a rectangle and you can view the details of the component in the pane.
9. In the Add Content window, click Open in the Learning Management folder to add the component.
10. Click Add in the Learning Association component. The selected component is added to the specified region in the Model Profiles page.
11. Click Close. You return to the page where the component is added.
12. From the View menu select Design. The component you just added to the region is displayed in the page.
13. Click the Edit gear wheel icon to configure the component.
14. Specify ORA_JOB_PROFILE Source Type and #{pageFlowScope.pProfileId} Source ID.
15. Enter a title Role Training for the Association component.
16. Click Save and Close.

Adding and Configuring Learning Showcase Component

1. From the Home page, navigate to About Me and Career Development and then to the Explore Roles page.
2. In the Setting and Actions menu, select Structure Pages.
3. In the Structure Pages window, select the level: Site, HCMCountry, or HCMOrganization, at which you want to add the learning.
4. From the View menu select Source.
5. When you click on the region to configure, the Confirm Task Flow Edit window appears. Click Edit.
6. Select the region of the page where you want to add the component. Click Add Content. The selected region is highlighted in a rectangle and you can view the details of the component in the pane.
7. In the Add Content window, click Open in the Learning Management folder to add the component.
8. Click Add in the Learning Showcase component. The selected component is added to the specified region in the Explore Roles page.
9. Click Close. You return to the page where the component is added.
10. In the Showcase Component region, click the Edit gear wheel icon to configure the component and define the style and context options.
11. Click the Context tab and specify ORA_JOB_PROFILE as the Source Type and ProfileId as the Source ID.
12. Click the Style tab and specify the Title Role Training. The title you provide here appears just below the Showcase Component title in the page you want to embed the learning items.
13. Select the Cards Swim Lane showcase style for the learner to view the learning items as cards in a swim lane.
14. In the Attributes to Show region, select the check boxes, Thumbnail, Contributor, Title, Action button, Duration.
15. Select Featured Content sort option. Learning items in the component are sorted by featured content.
16. Select the Enable scrolling check box so that learners can scroll through the learning items. You can preview the showcased learning items in the Preview region as you specify the options.
17. Click Save and Close.
18. Click Close to close the page composer and then view the just added component in the page.
Adding Learning Items to Learning Association Component

After the administrator adds the component to the page, the learning specialist can add and delete the learning items from the Association component. Associate the business object with relevant learning items. For example, associate videos that give an overview about a given job profile.

1. Navigate to the Manage Model Profiles page, Association Component region
2. View the learning items listed for the source type. Then add a video you have published, click Add.
3. In the Search and Select Videos window, select My Published Items and enter the name of the video and click Search.
   You can add videos published by you or anyone in the application.
4. From the search results, select one or more learning items and click Add.
5. The selected items are added to the component. Click the Featured Learning icon adjacent to the learning item.
   Featured items appear at the top of the table for the learner.

Viewing Learning Items in Application Context

Learners can now view relevant videos that are associated to the roles and job profiles. When viewing the job profile details, learners now can view the videos per the defined options:

- View videos associated to the job profile
- Scroll through videos cards in the swim lane
- Play videos
- View video attributes:
  - Thumbnail
  - Title
  - Contributor
  - Duration

1. Navigate to the Explore Roles page and view the learning items in the Showcase Component region.
2. Select a role and view the associated videos.
3. Select the video and play it.

Related Topics

- Modify Page Components Using Resource Catalog
- Page Component Properties

FAQs for Contextual Learning
What's Featured Learning?

Learning content that represents the learning for a specific group of learning items. When you set a learning item as Featured Learning in the Association component, that particular item appears first in the list for a learner.

You can mark only one item as featured. When configuring the Showcase component, you can sort by featured learning.

How can I sort learning items order in the Showcase component?

You can set one of the following Sort options in the Configure Showcase Learning Items page:

- Featured Learning
- Most Recent
- Most Liked
- Most Viewed
5 Managing Learners

Learners

Adding Learners: Procedure

You can add learners to an offering whenever you create or update an offering. Add new learners and track the status of existing learners from the Offerings tab in the Learning Catalog or the Learning Assignments tab on the Learners page.

Adding Learners

Perform the following steps to add learners to an offering:

1. On the Offering page click the Learners tile.
2. In the Learner Results section, click Add Learners.
3. Select the type of assignment whether Voluntary, Required, or Recommended.
4. In the Assignment Details page, enter the details for the selected assignment type. You must select an item for the Assign field before you can continue.
5. In the Select Learners By field, specify whether to select learners by searching for named users, or based on an existing analysis report, or by organization chart.
6. Select learners either by searching for people or using an analysis report or by organization chart. You can select from a list of analysis reports that get a set of Person IDs which are placed in the designated folder. The application runs the selected report and adds the people specified by the report to the offering as learners.

Note: Learners can enroll themselves by searching a course and selecting an offering from the Current Learning page.

Managing Existing Learners

On the Manage Learners page, you can view all learners currently enrolled in the offering, either by you or learners themselves. You can withdraw a learner’s enrollment and manually set the status of a learner to Completed. To perform these tasks:

1. Go to the Manage Learners page. In the Search Learners section, search for learners by name or assignment status.
2. You can withdraw a learner’s enrollment if the learner has either not started the offering or is in progress. Highlight the assignment and learner, then select Withdraw Learners from the Change Status menu. You must select a withdrawal reason and enter comments when prompted. This cancels the enrollment and also the requirement (for Required assignment type) or recommendation (for Recommended assignment type).
3. You can mark an offering as completed for a learner. Select the learner, then click Manage Activities. On the Manage Activities page, indicate the Completion Date, select a Completion Status, and optionally select a Reason Code for completion.
4. You can send an email by selecting one or more learners on the Learners page. Then, click Send Email and select To Learners.

Learning Assignments
Learning Assignments: Explained

You can assign learners to a learning item and specify whether the assignment is voluntary, required, or recommended. You can assign learners to items either from the Manage Learners page, or from within any assignable learning item in the Learning Catalog.

Assignment Types

Assignment types include:

<table>
<thead>
<tr>
<th>Assignment Type</th>
<th>Automatic Enrollment</th>
<th>Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voluntary</td>
<td>Yes</td>
<td>Completion of voluntary items is not mandatory. Learners can see these assignments in the Voluntary Learning section of their Current Learning page. They choose when to complete them.</td>
</tr>
<tr>
<td>Required</td>
<td>Yes</td>
<td>Completion is mandatory by a specified date. Learners can view mandatory assignments, who assigned them, and their due dates in the Required Learning section of the Current Learning page.</td>
</tr>
<tr>
<td>Recommended</td>
<td>No</td>
<td>Completion is not mandatory. Learners can see recommended items on the View Recommendations page, as well as who recommended the items to them. They can navigate to learning items directly from a recommendation.</td>
</tr>
</tbody>
</table>

Assignment Statuses

Assignment statuses help you track and control the progress of learners. Assignment statuses include:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td>Indicates that a learner has completed all the required components of the learning item. The application automatically sets the status of the learner to Completed. You can also manually set the status of a learner to Completed. You can't revert the change after it is set to Completed or to any other status.</td>
</tr>
<tr>
<td>Content Complete</td>
<td>Indicates that learning was completed for the offering but the mandatory evaluation is pending.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Indicates that the learner has started at least one component of the learning item.</td>
</tr>
<tr>
<td>Not Started</td>
<td>Indicates that the learner hasn’t started any of components of the learning item.</td>
</tr>
<tr>
<td>Not Passed</td>
<td>Indicates the learner didn’t meet the completion criteria of the learning item’s components.</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Indicates that the learner is withdrawn from the enrollment of the learning item. A withdrawal is possible for those learners whose assignment status is either Not Started or In Progress.</td>
</tr>
</tbody>
</table>
### Assignment Lifecycle

Assignments have various statuses as they advance through the assignment workflow. For a detailed look at how this works, refer to the Oracle Learning Cloud Assignment Lifecycle document (2518274.1) on My Oracle Support at https://support.oracle.com.

**Related Topics**
- Access Control: Explained

### Creating a Voluntary Assignment: Procedure

You can create a voluntary learning assignment. Learner completion of voluntary items is not mandatory. Learners can see these assignments in the Voluntary Learning section of their Current Learning page. They choose when to complete them.

You can create assignments from two places:
- Learners > Learning Assignments > Search Learners
- Learning Catalog > Learning Item (Offering, Course, Specialization) > Select an item from the Search Results > Learners tile

The steps from both areas are the same, except where noted. The steps below begin from Learners.

There are three basic steps to completing an assignment:

1. Define the assignment details.
2. Select the learners for the assignment.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested</td>
<td>Indicates that a learning request is made for an assignment to a learning item, and is pending approval.</td>
</tr>
<tr>
<td>Pending Active</td>
<td>Indicates the learner can’t yet start any of the learning item’s components.</td>
</tr>
<tr>
<td>Pending Prerequisites</td>
<td>Indicates that the learner has been assigned to a learning item, but can’t start any of its components until the learning prerequisites are achieved.</td>
</tr>
<tr>
<td>Waitlist</td>
<td>Indicates that the learner is on the waiting list of the offering, because it is at capacity.</td>
</tr>
<tr>
<td>Request Approved</td>
<td>Indicates that the learning request is approved and pending activation by an administrator. Assignments only end up in this status if auto-activation is not selected in the Access Control rules configuration.</td>
</tr>
<tr>
<td>Request Rejected</td>
<td>Indicates that the learning request is rejected.</td>
</tr>
<tr>
<td>Withdraw Pending Approval</td>
<td>Indicates the learner has submitted a request to be withdrawn from the learning item, and it is not yet approved.</td>
</tr>
<tr>
<td>Deleted</td>
<td>Indicates the learner is deleted from the assignment. After deleting, the assignment doesn’t show up in the learner’s transcript.</td>
</tr>
</tbody>
</table>
3. Apply advanced rules to the assignment.

**Define the Assignment Details**

Define the details of the assignment.

1. In the My Client Groups work area, click Learning.
2. Click Learners, and in the Learner Results area.
3. Click Add Learners.
4. Select Voluntary.
5. Type a name for the assignment. This is attribute is only shown to the administrator.
6. Optionally, type a description. This information is for administrators and is not shown to learners.
7. Select a start date. This is the date that assignment becomes visible to learners on their Current Learning page. By default, the current date displays.
8. Click Select item to choose the learning item you want to assign.

> **Note:** If you navigated to this page from the Learning Catalog, the learning item is already selected for you.

9. Select either Self or any of the aliases in the Assign As drop-down list.
10. Optionally, type some notes regarding the assignment.

> **Note:** The fields in the Learning Request Details section are useful if you are using an approval process for assignments.

11. Select a start on or after date. This is the target date you want learners to begin the assignment.
12. Select a complete by date. This is the target date you want learners to complete the assignment.
13. Type the purchase order number. This is the purchase number that should be used for this request.
14. Type any justification comments you think are necessary.
15. Complete any additional fields that display in this section. These are flexfields created specifically for your organization.
16. Click Next.

**Select the Learners for the Assignment**

Select the learners you want for the assignment.

1. Click Select Learners.
2. Select one of the following:
   - **Using Analysis Report** - search for learners using a pre-defined analysis report.
   - **Using Organization Chart Group** - search for learners using an organizational chart group. You can select either a learner’s entire organization or just their direct reports.
   - **Learners** - search for learners based on worker based attributes or learning assignments. When you click Personalize, you can save this particular search for use later.
   - **Using Learner Criteria** - search for specific learners using either worker criteria or assignment criteria, such as searching for learners based on the attributes of assignments made to them.
3. Click Next.
Define the Advanced Rules for the Assignment

Choose the advanced rules for the assignment.

1. Select either Active or Request approved for the initial assignment status. This is the status the assignment will be in when you initially create it.

2. Select either Latest, or Assignment to Learner Date for the Learning Item As-of Date field. This indicates which version of a learning item learners see after it is assigned. If you select Latest, learners will always see the latest version of the learning item until they complete it, even if you later update it. If you select Assignment to Learner Date, learners will always see the version of the learning item as it existed when you assigned it, even if you later update it. Once completed, regardless of this setting, learners will see the version they completed.

3. Click Submit.

Creating a Required Assignment: Procedure

Completion is mandatory by a specified date. Learners can view mandatory assignments, who assigned them, and their due dates in the Required Learning section of the Current Learning page.

You can create assignments from two places:

- Learners > Learning Assignments > Search Learners
- Learning Catalog > Learning Item (Offering, Course, Specialization) > select an item from the Search Results > Learners tile

The steps from both areas are the same, except where noted below. The steps below begin from Learners.

There are three basic steps to completing an assignment:

1. Define the assignment details.
2. Select the learners for the assignment.
3. Apply advanced rules to the assignment.

Define the Assignment Details

Define the details of the assignment.

1. In the My Client Groups work area, click Learning.
2. Click Learners, and in the Learner Results area.
3. Click Add Learners.

4. Select Required.

5. Type a name for the assignment. This is attribute is only shown to the administrator.

6. Optionally, type a description. This information is for administrators and is not shown to learners.

7. Select a start date. This is the date that assignment becomes visible to learners on their Current Learning page. By default, the current date displays.

8. Click Select item to choose the assignment.

Note: If you navigated to this page from the Learning Catalog, the assignment is already selected for you.

9. Select either Self or any of the aliases in the Assign As drop-down list.

10. Optionally, type some notes regarding the assignment.
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Managing Learners

Note: The fields in the Learning Request Details section are useful if you are using an approval process for assignments.

11. Select a start on or after date. This is the target date you want learners to begin the assignment.
12. Select a complete by date. This is the target date you want learners to complete the assignment.
13. Type the purchase order number. This is the purchase number that should be used for this request.
14. Type any justification comments you think are necessary.
15. Complete any additional fields that display in this section. These are flexfields created specifically for your organization.
16. Click Next.

Select the Learners for the Assignment

Select the learners you want for the assignment.

1. Click Select Learners.
2. Select one of the following:
   - Using Analysis Report - search for learners using a pre-defined analysis report.
   - Learners - search for learners based on worker-based attributes or learning assignments. When you click Personalize, you can save this particular search for use later.
   - Using Organization Chart Group - search for learners using an organizational chart group. You can select either a learner's entire organization or just their direct reports.
   - Using Learner Criteria - search for specific learners using either worker criteria or assignment criteria, such as searching for learners based on the attributes of assignments made to them.
3. Click Next.

Define the Advanced Rules for the Assignment

Choose the advanced rules for the assignment.

1. Select either Active or Request approved for the initial assignment status. This is the status the assignment will be in when you initially create it.
2. Select either Latest, or Assignment to Learner Date for the Learning Item As-of Date field. This indicates which version of a learning item learners see after it is assigned. If you select Latest, learners will always see the latest version of the learning item until they complete it, even if you later update it. If you select Assignment to Learner Date, learners will always see the version of the learning item as it existed when you assigned it, even if you later update it. Once completed, regardless of this setting, learners will see the version they completed.
3. Select the validity period option. This enables you to set a start date for the time period during which completing the assignment is considered valid. If you select After Due Date, the validity period starts after the assignment due date if the assignment is completed. If a learner completes the assignment one month before the due date, the assignment will not be valid until the due date has passed. If you select After Completion, the validity period starts after the assignment is completed. If the assignment is not completed and due date is reached, the validity period does not start, because the assignment is not completed.

Note: This field is only for use with required course assignments.

4. Select the expiration rule to indicate if or when an assignment expires:
   - Expires on Date - define an expiration date, and set a recurrence (for example: every year, or every 2 years.). For example, you could set an assignment to expire every 2 years on June 1.
Expires in Years - define an expiration date in years. This date is relative to the validity period start. For example, if validity is set to completion date, and a learner completes an assignment on December 1 2019, and the assignment expires in 1 year, it expires December 1 2020. This differs from Expires on Date, because the expiration date is calculated instead of statically defined.

Never Expires - the assignment has no expiration date.

Expires in Days - define an expiration date in days. For example, an assignment might be set to expire in 7 days.

**Note:** This field is only for use with required course assignments.

5. Select the renewal option:

- **None** - there is no assignment renewal.
- **After Completion** - learners receive the next renewal assignment immediately upon completing the current assignment.
- **Period Before Expiration** - the renewal occurs before the initial assignment expiration. This means learners will receive the next assignment the specified number of days before the current assignment expires. Indicate the number of days prior the initial assignment expiration to send the renewal.
- **After Due Date** - the renewal occurs after the initial assignment due date. Enter the number of days that must elapse after the due date before the renewal can be sent.

**Note:** This field is only for use with required course assignments.

6. Click Submit.

Creating a Recommended Assignment: Procedure

You can create a recommended learning assignment. Completion of a recommended assignment is not mandatory. Learners can see recommended items on the View Recommendations page, as well as who recommended the items to them. They can navigate to the learning items directly from a recommendation.

You can create assignments from two places:

- Learners > Learning Assignments > Search Learners
- Learning Catalog > Learning Item (Offering, Course, Specialization) > select an item from the Search Results > Learners tile

The steps from both areas are the same, except where noted below. The steps below begin from Learners.

There are three basic steps to completing an assignment:

1. Define the assignment details.
2. Select the learners for the assignment.
3. Apply advanced rules to the assignment.

**Define the Assignment Details**

Define the details of the assignment.

1. In the My Client Groups work area, click Learning.
2. Click Learners, and in the Learner Results area
3. Click **Add Learners**.
4. Select **Recommended**.
5. Type a name for the assignment. This attribute is only shown to the administrator.
6. Optionally, type a description. This information is for administrators and is not shown to learners.
7. Click **Select item** to choose the assignment.

> **Note:** If you navigated to this page from the Learning Catalog, the assignment is already selected for you.

8. Select either **Self** or any of the aliases in the **Assign As** drop-down list.
9. Optionally, type some notes regarding the assignment.

> **Note:** The fields in the **Learning Request Details** section are useful if you are using an approval process for assignments.

10. Select a start on or after date. This is the target date you want learners to begin the assignment.
11. Select a complete by date. This is the target date you want learners to complete the assignment.
12. Type the purchase order number. This is the purchase number that should be used for this request.
13. Type any justification comments you think are necessary.
14. Complete any additional fields that display in this section. These are flexfields created specifically for your organization.
15. Click **Next**.

**Select the Learners for the Assignment**

Select the learners you want for the assignment.

1. Click **Select Learners**.
2. Select one of the following:
   - **Using Analysis Report** - search for learners using a pre-defined analysis report.
   - **Learners** - search for learners based on worker based attributes or learning assignments. When you click **Personalize**, you can save this particular search for use later.
   - **Using Organization Chart Group** - search for learners using an organizational chart group. You can select either a learner's entire organization or just their direct reports.
   - **Using Learner Criteria** - search for specific learners using either worker criteria or assignment criteria, such as searching for learners based on the attributes of assignments made to them.
3. Click **Next**.
4. Click **Submit**.

> **Note:** The recommendation is sent to learners when you click **Submit**. The Assignment status is always Recommended. The version of the learning item is always the latest. If you update a learning item after sending a recommended assignment, learners will always access the latest version.

**Learning Initiatives**
Learning Initiatives: Explained

An ongoing assignment is called a learning initiative. Unlike a learning assignment, which is applicable only once, you can create and define a learning initiative once and generate multiple assignments in a series with or without an end date. You can assign it to a group of learners in an organization by using an analysis report or an organization chart. For example, you can create a learning initiative for the Ethics and Business Conduct course and assign it to all employees when they join the organization. The initiative continually creates assignments to all the newly joined employees to complete the course in the specified duration and date.

The Evaluate Person IDs for Assignment Rule process and Reconcile Dynamic Assignments process verify for new learners or learners leaving the group to assign the assignments in the learning initiative.

Similar to assignment types, the following are learning initiative types:

- Voluntary learning initiative
- Required learning initiative
- Recommended learning initiative

You can create a learning initiative for an offering, course, or a specialization from the:

- Learners content area of the learning item
- Administrator work area Learners page on the Learning Initiatives tab

Creating a Required Learning Initiative for Ethics and Business Conduct Course

The following example explains the steps to create a required learning initiative for the Ethics and Business Conduct course from the Administrator work area Learners page:

1. On the Learners page, Learning Initiatives tab, click Add Initiative > Required.
2. On the Assignment Details page, specify the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Assignment for Business Ethics</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You can use the system-generated name or assign your own.</td>
</tr>
<tr>
<td>Description</td>
<td>This is a required assignment for the entire organization.</td>
</tr>
<tr>
<td>Assign</td>
<td>Search for and select the Ethics and Business Conduct Course</td>
</tr>
<tr>
<td>Assign As</td>
<td>Select Self. Learners will be able to view that you assigned the learning item to them. To assign it as someone else, use other values such as Office of the CEO, Security, Legal Department.</td>
</tr>
<tr>
<td>With This Note</td>
<td>Enter any text you want to display to learners with this assignment: Learn organization business ethics from this course.</td>
</tr>
<tr>
<td>Initial Due Date</td>
<td>Select Days in the list and enter 15. This 15 days due period is applicable to learners identified on the initiative start date.</td>
</tr>
</tbody>
</table>
3. Click **Next**.
4. On the **Select Learners** page, click **Add Learners** and then **Search and Select Organization Chart Group**.
5. Select the organization group and click **OK**.
6. Click **Next** to specify the **Advanced Rules** of the initiative as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ongoing Due Date</strong></td>
<td>For the other learners, who are the target of this initiative, specify 20 Days. Learners who take this course must complete the course within 20 days of taking the course after joining the organization.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Learning Item As-Of</strong></td>
<td>Select <strong>Latest</strong> in the list. The latest course content is available to learners when they take the assignment. You can select Initiative Start Date or Assignment to Learner Date to display the course as it is on these dates.</td>
</tr>
<tr>
<td><strong>Validity Period Options</strong></td>
<td>Select <strong>After Completion</strong> so that the assignment completion is valid immediately after completing the assignment and not after the due date.</td>
</tr>
<tr>
<td><strong>Expiration</strong></td>
<td>Select <strong>Expires in Years</strong> and select <strong>Every Two Years</strong>. You must provide a renewal option when you set an expiry for the course.</td>
</tr>
<tr>
<td><strong>Renewal Options</strong></td>
<td>Select <strong>After Completion</strong> in the list so that the course assignment is renewable only after completion.</td>
</tr>
<tr>
<td><strong>Learner Reconciliation</strong></td>
<td>This is a learning initiative-specific option. You can reconcile the learners with the assignments for the initiative. Select the check box to withdraw assignments of learners, who are no longer a part of this learning initiative.</td>
</tr>
</tbody>
</table>

7. Click **Submit**. If the initiative processing is successful, you get a confirmation that the initiative is created and sent to the recipients.

**Related Topics**
- Adding an Evaluation Questionnaire to an Offering: Procedure

**How can I find a course or specialization with a specific outcome to assign to a learner?**

Use **Search by Learning Outcomes** on the **Manage Catalog** page to find courses or specializations with specific learning outcomes. Type keywords related to the learning outcome to run a **Basic** search. Else, use **Advanced** search to type keywords containing specific attributes or values used in the learning outcome. From the search results, select the course and open the offering details. Use **Manage Learners** to assign the course or specialization to learners.
What's the difference between learning assignment and learning initiative?

A learning assignment is a piece of learning assigned to a learner or a group of learners on a specific date. For example, the Agile Project Management course is assigned to employees in a specific organization because they have to use this methodology for a specific project.

A learning initiative is an ongoing assignment for a group of learners. For example, you assign Ethics and Business Conduct for employees joining the organization after 1 January 2017. You can create a learning initiative that creates assignments to all employees who join the organization and repeat the course every 2 years.
6 Other Administrator Features

External Providers

External Providers: Overview

Oracle Learning Cloud integrates with external providers to provide you with an enhanced user experience and additional functionality. Oracle Learning Cloud currently integrates with the following providers:

- WebEx
- YouTube
- Skillsoft

There are steps to enable and configure these external provider integrations to work with Learning Cloud.

WebEx

Virtual Instructor Led Training: Overview

Virtual Instructor Led Training (Virtual Instructor Led Training) is instructor led training conducted via the internet, using conferencing services such as Cisco WebEx.

Oracle Learning Cloud integrates with WebEx Meeting Center and WebEx Training Center. Using this integration, you can create and update WebEx web conferencing events directly in Oracle Learning Cloud. Instructors (hosts) and Learners (attendees) can access training using web conferencing links located within offerings.

Administrator Experience

When you enable WebEx, Administrators can do the following:

- Select a WebEx Account when creating virtual instructor led training activities.
- Create and modify virtual instructor led training activities. When you save an activity, an integration job runs and creates or modifies meetings in WebEx for the Instructors and the Learners assigned to the activity.
- Assign or withdraw learners from virtual instructor led training activities. When you assign learners to an activity, an integration job runs, and they are added as attendees to the associated WebEx meeting. When you withdraw learners from an activity, the job runs, and they are removed as attendees from the associated WebEx meeting.

Learner Experience

When you enable WebEx, learners can do the following:

- Add the virtual classroom information to their calendars from the activity details page prior to the event.
- Join the virtual classroom directly from the activity details page 15 minutes before the event.
- View the recording directly from the activity details page after the event.
Instructor Experience

When you enable WebEx, instructors can do the following:

- Add the virtual classroom information to their calendars from the offering details page.
- Join the virtual classroom directly from the offering details page on the day of the event.
- View the recording directly from the offering details page after the event.
- View the attendance report in the activity details page in edit mode after the event. This report becomes available several hours after the event, because WebEx has to create the attendance report.

Before You Begin

You need to have an account with WebEx before you can enable this feature. WebEx should provide you with the following information:

- Site Code
- Site ID
- Partner ID

This information is required to enable the integration with Learning Cloud.

WebEx Integration Overview

The following are the high-level steps you need to follow to enable and configure WebEx and make it available to users in your Learning Cloud.

1. Create the Delegate Administrator in WebEx.
2. Create meeting templates in WebEx and associate them to each Instructor in WebEx.
3. Create a WebEx Site Account in Learning Cloud.
4. Create a WebEx Account for Instructors in Learning Cloud.
5. Configure ESS Job to Associate Attendance Report in Learning Cloud.

Create a Delegate Administrator in WebEx: Procedure

Create a site level administrator delegate account in WebEx, and assign it to all the instructors in WebEx. The administrator delegate account behaves like an integration user. When you create a Virtual ILT meeting in Oracle Learning Cloud for an instructor, the integration uses the administrator delegate account to create meetings on that instructor's behalf. Using one account eliminates the need to maintain WebEx credentials for all instructors.

Once you have created the delegate account in WebEx, perform the following steps:

1. Create a WebEx site account in Oracle Learning Cloud. Use the delegate user name and password during the WebEx setup
2. Ensure that the WebEx delegate has been added as a delegate to all the instructors in WebEx.

Create Meeting Templates and Associate Them to Instructors in WebEx: Procedure

Create at least one template in WebEx for Meeting Center and Training Center. You can do so by creating a meeting, and clicking the Save As Template button. All the meeting options you selected for that meeting are saved to the template, and you can reuse them when creating future WebEx meetings. The templates appear in the WebEx Users profile preferences area. You can select default templates to be part of your profile preference. When you set up an Instructor in Oracle Learning Cloud, you are required to choose a meeting template for the integration. Templates must exist on WebEx Users for each WebEx service.
Create a WebEx Site Account in Learning Cloud: Procedure
Create a virtual instructor-led site account in Learning Cloud to call the proper customer site account.

1. In the My Client Group area, click Learning.
2. Click Setup.
3. Click External Providers.
4. Click Configure next to WebEx.
5. Click Create.
6. Enter an account name. This is the display name for the WebEx account in Learning Cloud. This is not used in the integration, but is a required field.
7. Enter a description. This field is for informational purposes.
8. Select one of the following for Status:
   - **Active** - to make the account active and available for use for instructors and virtual instructor led activities.
   - **Inactive** - to make the account inactive and unavailable for use for all instructors associated to the account. You can no longer associate the account to instructors and offering activities.

   ![Note:](image) When you change the status of the account to inactive, you must also remove it from any virtual instructor-led offerings using it.
9. Enter the site code. You obtain information from WebEx. Typically, the site ID is the same or similar to the company ID in the WebEx URL. For example, the XYZ Company’s WebEx URL is www.XYZ.webex.com and the site code is XYZ. This information is located in the Administrator settings area within WebEx.
10. Enter the site ID. You obtain information from WebEx. This is located in the Administrator settings area within WebEx.
11. Enter the partner ID. You obtain information from WebEx.
12. Enter a name for the administrator who is responsible for the WebEx integration within your organization. This field is for informational purposes only.
13. Enter the user ID for the administrator delegate account used for the integration to create WebEx meetings for instructors.
14. Enter the WebEx password for the delegate account.
15. Click Validate to ensure that the configuration parameters are set up correctly. If “Success” displays on the page, the integration has been set up correctly. Two tables also display. The first lists all future offerings scheduled using this WebEx account. The second displays any integration errors that happened when using this account. This is useful to troubleshoot problems, such as why meetings may not have been created in WebEx.
16. Click Save and Close.

Create a WebEx Account for Instructors: Procedure
Associate a WebEx account to an instructor.

1. In the My Client Group area, click Learning.
2. Click Catalog Resources.
3. Click Instructors.
4. Search for and select the instructor you want.
5. Click Create.
6. Enter the account name. This is the display name of the WebEx site. You can associate one account to an instructor at a time.
7. Select one of the following for Status:
   - **Active** - to make the account active and available for use for instructors and virtual instructor led training activities.
8. Enter the user name of the instructor. Typically, the instructor user names are in the form of an email address. This field is required so that WebEx can create meetings for this person.

Configure ESS Job to Associate Attendance Report: Procedure
Configure the Virtual Classroom Attendance Report job to run daily. This report pulls the attendance report from WebEx events, and adds them as attachments to the activity details page. Both administrators and instructors can view this report while in edit mode within an activity.

Note: Be aware that it can take WebEx several hours to create the attendance report.

Related Topics
• Processes in Oracle Learning Cloud: Explained

Skillsoft

Skillsoft: Explained
Oracle Learning Cloud integrates with Skillsoft, a third party company that produces learning management software content. When you enable this integration, you can import courses from Skillsoft directly into Oracle Learning Cloud. You can import a single course at a time, or bulk load multiple courses. Once imported, an automatic process (Import Skillsoft Content) runs in the background to create courses, offerings, and activities associated with the content.

Before You Begin
You need to have an account with Skillsoft before you can enable this feature. Skillsoft should provide you with the following information:

• Skillsoft URL
• Company ID
• Shared Key

This information is required to enable the integration with Learning Cloud.

Skillsoft Configuration Overview
The following are the high-level steps you need to follow to enable Skillsoft and make it available to users in your Learning Cloud.

1. Enable Skillsoft for the appropriate users by granting them the Manage External eLearning Content security permission.
2. Enable the Skillsoft integration for Learning Cloud.
3. Synchronize Oracle Learning Cloud with the Skillsoft library
4. Import Skillsoft content to the catalog. This import creates Skillsoft content, courses, offerings and activities within the catalog.
Related Topics
  • Standard Application Users for Oracle Learning Cloud: Overview

Enable Skillsoft for Learning Cloud: Procedure
You must enable Skillsoft before you can begin using it with Learning Cloud. Once enabled, and you have obtained the Skillsoft security privilege, you are able to see the Import Skillsoft Courses option in the Add Content drop-down list on the Catalog Resources page.

1. In the My Client Group area, click Learning.
2. Click Setup.
3. Click External Providers.
4. Click Configure next to Skillsoft.
5. Select the Enabled check box.
6. Enter the Skillsoft URL. You obtain information from Skillsoft.
7. Enter the Company ID. You obtain this information from Skillsoft.
8. Enter the Shared Key. You obtain this information from Skillsoft.
9. Enter the name of the administrator who is responsible for the integration. You can use this field for informational purposes. Leaving it blank does not affect your ability to enable this integration.
10. Click Save and Close.

Related Topics
  • Processes in Oracle Learning Cloud: Explained

Enable Skillsoft for Users: Procedure
The appropriate users must have the Manage External eLearning Content security privilege before they can see the see the Import Skillsoft Courses option in the Add Content drop-down list on the Catalog Resources page.

Related Topics
  • Oracle Fusion Applications Security Console: Explained
  • Standard Application Users for Oracle Learning Cloud: Overview

Synchronize Learning Cloud with the Skillsoft Library
To ensure that Skillsoft data is up-to-date within Learning Cloud, you must periodically run the Load and Synchronize Skillsoft Content job from the Scheduled Processes work area.

This job is responsible for loading available courses from Skillsoft into the Oracle Learning Cloud staging area so that they are available for import. During the synchronization, Skillsoft metadata and content status information downloads to Learning Cloud so it can be searched in the staging area, and users can see if the content is new or updated content. Oracle recommends that you schedule this job to run daily. You can also run it on demand, if force synchronization is required.

Synchronize Statuses
After you run the Load and Synchronize Skillsoft Content job from the Scheduled Processes work area, a status displays for each course.

  • New - indicates that this is a new course, and it was not imported.
  • Modified - indicates that a course has been imported, but has changed on Skillsoft.
• Current - indicates a course is in sync with Skillsoft, and has been imported.
• Removed - indicates that a course was imported as "Not entitled" from Skillsoft, and that you should remove it.
• Deactivated - indicates that a course removal has processed.

Related Topics
• Processes in Oracle Learning Cloud: Explained

Import Skillsoft Content: Procedure
Before you can use import Skillsoft content, you must import them to the learning resources catalog.

1. In the My Client Groups work area, click Learning.
2. On the Catalog Resources page, click the Content tab.
3. Click Add Content.
4. Select Import Skillsoft Courses.
5. Search for and select the Skillsoft content you want to import.
6. Click one of the following:
   o Import - to import a single item.
   o Import All - to import all selected items.
7. When the "You are about to create a course, offering, and activity for this Skillsoft asset. Do you want to continue?" message displays, click Yes.

The courses are imported, and remain in Import Requested status until the import process completes. You can find them by selecting Import Requested from the Import Status drop-down list in the search area. The content remains in this status until the Import Skillsoft Learning Content job completes. This job runs automatically in the background, and creates content, courses, offerings and activities for the imported Skillsoft content.

Automatic Process for Skillsoft
When you import Skillsoft content on the Catalog Resources page, the Import Skillsoft Learning Content job runs automatically. You cannot schedule this job or run it on demand. This job creates content, courses, offerings, and activities for the imported content. This job might create multiple offerings for a course based on the Skillsoft course number naming standards. Skillsoft courses are similar to Oracle Learning Cloud offerings. If a Skillsoft course exists in multiple languages, the import process creates one course, with multiple course translation records, and many offerings for each Skillsoft language item identified.

✏️ Note: Ensure that the Import Skillsoft Courses job is not running at the same time as the Load and Synchronize Skillsoft Content job. Also, only run one instance of the Import Skillsoft Courses job at a time. For example, when you select Import All, this job begins to run. If you then import other items, other instances of this job will also run. Wait for the first job to complete before importing other Skillsoft content.

Related Topics
• Processes in Oracle Learning Cloud: Explained

Configuring YouTube Video Search: Points to Consider
Enable YouTube Video Search so that learners can search for YouTube videos when creating the tutorials. For more details see Google’s YouTube Data API Overview.
Configure Parameter Options
You enable and configure YouTube Video Search on the **External Providers** tab, **Manage Setup** page in the Administrator work area. The following table explains YouTube configuration parameters options:

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube API Key</td>
<td>Enter the unique identifier for your project, which you create on the Credentials page of the Google API Console.</td>
</tr>
<tr>
<td>Video License Type</td>
<td>Select to restrict the videos in search results to a specific license type or to show videos with any license type. YouTube videos can have the Creative Commons license or the standard YouTube license.</td>
</tr>
<tr>
<td>Safe Search Mode</td>
<td>Select to exclude restricted content from search results. The options are:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Strict</strong> excludes all the restricted content from search results.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Moderate</strong> excludes content that’s restricted in the user’s locale.</td>
</tr>
<tr>
<td></td>
<td>• <strong>None</strong> doesn’t filter the search results. Includes all the content.</td>
</tr>
<tr>
<td>Maximum Result Set Size</td>
<td>Enter a number up to 50 to specify the maximum number of search results. The default value is 6.</td>
</tr>
<tr>
<td>Publisher ID Filter</td>
<td>Optionally, enter a channel identifier to restrict search results to videos created by a single channel.</td>
</tr>
<tr>
<td>Region Code Filter</td>
<td>Optionally, enter a region code to restrict search results to videos from publishers in a single region.</td>
</tr>
</tbody>
</table>

**Related Topics**
- YouTube Data API Overview
- Google API Console
- Authoring a Tutorial: Worked Example

Deep Links

Creating Deep Links in Learning: Procedure
Learning Cloud supports direct access via deep links to the self-service and administrator views of catalog courses, offerings, and specializations. Deep links are URL links that can be distributed outside of Learning Cloud, that allow users to open pages without navigating through a menu structure. For example, you create a deep link to a learning item, then copy and paste that link to an email message or notification. The recipient can use the link to directly access the learning item from the email or notification.

> **Note:** Deep links are bound by the access control rules (self-service access rules for self-service links, functional/date security for administrator links) that are defined for learning items.
You can obtain these direct links from the Learning Item Number link when viewing Learning items and share them with others. An HTML code snippet is also available to embed the self-service details page of an item into other applications or web pages. Learners can access these direct links from the learning item details page action button.

You can create deep links, for both self-service learners and administrators, to the objects shown in this table.

<table>
<thead>
<tr>
<th>Learner Role</th>
<th>Learning Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Service</td>
<td>• Course</td>
</tr>
<tr>
<td></td>
<td>• Specialization</td>
</tr>
<tr>
<td></td>
<td>• Video</td>
</tr>
<tr>
<td></td>
<td>• Tutorial</td>
</tr>
<tr>
<td></td>
<td>• Community</td>
</tr>
<tr>
<td></td>
<td>• Offerings</td>
</tr>
<tr>
<td></td>
<td>• Search Results</td>
</tr>
<tr>
<td></td>
<td>• My Learning</td>
</tr>
<tr>
<td></td>
<td>• What To Learn</td>
</tr>
<tr>
<td>Administrator</td>
<td>• Specialization</td>
</tr>
<tr>
<td></td>
<td>• Course</td>
</tr>
<tr>
<td></td>
<td>• Offering</td>
</tr>
<tr>
<td></td>
<td>• Community</td>
</tr>
</tbody>
</table>

To enable visibility of learning item links to learners, use Page Composer to place a direct link to the learning item on a Learning Cloud page.

1. Open Page Composer in Source View mode and select the area in which you want to place a learning item link.
2. Add the HTML element to the page.
3. Edit the HTML element.
4. Select the Expression Builder for the value.
5. Copy and paste the Deep Link Page Composer snippet.
6. Close the configuration window and confirm that the link displays in Source View mode.
7. Close Source View mode and confirm the link displays properly on the page to end users.

Administrators can access shareable links to catalog items from the Learning Catalog page.

1. From the Home page, select My Client Groups > Learning.
2. On the Administrator Dashboard, select Learning Catalog > Offerings, Courses, or Specializations.
3. Search for a course.
4. In the Search Results, click a link in the Offering Number, Course Number, or Specialization Number column.
5. In the pop-up window that appears, select one of three options:
   - Self-Service Link: a URL that can be copied and shared, providing direct access to the item’s self-service details page.
   - Embed Code for Self-Service Link: HTML code that can be copied, which wraps the self-service link.
   - Administrator Link: a URL that can be copied and shared, providing direct access to the item’s administrative details page.

**Note:** In all cases, the user accessing these deep link URLs still requires authentication and is bound by the access control (self-service access rules for a self-service link, functional and data security for an administrative link) defined on the learning catalog item.
Related Topics
- Deep Links
- Access Control: Explained

Manually Adding Deep Links to Catalog Items: Explained

You can manually create a URL that directs users to a specific item in the learning catalog. For example, the following URL directs users to a course in Self-Service:

https://<host>/fndSetup/faces/deeplink?objType=WLF_LEARN_SS_VIEW_COURSE&action=NONE&objKey=itemId%3D<learningItemId>

Sample Self-Service Deep Links

You can create your own URL to specific items in the Self-Service area. This table provides you with sample URLs.

<table>
<thead>
<tr>
<th>Catalog Item Type</th>
<th>Sample URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_SS_VIEW_COURSE&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
<tr>
<td>Specialization</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_SS_VIEW_SPEC&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
<tr>
<td>Video</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_SS_VIEW_VIDEO&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
<tr>
<td>Tutorial</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_SS_VIEW_TUTORIAL&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
<tr>
<td>Community</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_SS_VIEW_COMMUNITY&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
<tr>
<td>Offering</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_SS_VIEW_OFFERING&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
<tr>
<td>Search Results</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_SS_SEARCH&amp;action=NONE&amp;objKey=pSearchInputTextShow%3D&lt;searchText&gt;&amp;pSearchItem%3D&lt;searchText&gt;</td>
</tr>
<tr>
<td>My Learning</td>
<td>https://&lt;host&gt;/hcmUI/faces/FndOverview?fndGlobalItemNodeId=WLF_FUSE_MY_WHAT_TO_LEARN</td>
</tr>
<tr>
<td>WTL</td>
<td>https://&lt;host&gt;/hcmUI/faces/FndOverview?fndGlobalItemNodeId=WLF_FUSE_MY_LEARN</td>
</tr>
</tbody>
</table>
Sample Administrator Deep Links

You can create your own URL to specific items for Administrators. This table provides you with sample URLs.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Sample URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_ADMIN_VIEW_COURSE&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
<tr>
<td>Specialization</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_ADMIN_VIEW_SPEC&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
<tr>
<td>Community</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_ADMIN_VIEW_COMMUNITY&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
<tr>
<td>Offering</td>
<td>https://&lt;host&gt;/fndSetup/faces/deeplink?objType=WLF_LEARN_ADMIN_VIEW_OFFERING&amp;action=NONE&amp;objKey=itemId%3D&lt;learningItemId&gt;</td>
</tr>
</tbody>
</table>

Alerts

Enabling Alerts in Learning Cloud: Procedure

Once you have set up the alert templates in the Alerts Composer, enable the alerts you want to use in Learning Cloud.

1. In the My Client Group area, click Learning.
2. Click Setup.
3. Click Manage Alerts.
4. Click Edit.
5. Select the following check boxes to enable them.

   - **Enable alerts for recommended learning items created in self-service.** When enabled, if a recommendation is created by the learner, the Learning Recommended to Learner alert is sent to the recipients defined in the alert.
   - **Enable alerts for recommended learning items created by the learning administrators.** When enabled, if a recommendation is created by an administrator, the Learning Recommended to Learner alert is sent to the recipients defined in the alert.
   - **Enable alerts to assignees for classroom changes.** When enabled, if an Administrator updates an instructor-led activity classroom, the Offering Definition has Changed alert is sent to the recipients defined in the alert.
   - **Enable alerts to assignees for changes to activity dates.** When enabled, if an Administrator updates an instructor-led activity date or time, the Offering Definition has Changed alert is sent to the recipients defined in the alert.
Enable alerts to instructors when instructor led activities change. When enabled, if an Administrator updates an instructor-led activity, the Offering Activity Definition has Changed for an Instructor alert is sent to the recipient defined in the alert.

6. In the Days before the start of training to send instructors an alert reminder field, enter the number of days prior to the training start date to send the Upcoming ILT Activity to Instructors Reminder alert. When a value is entered in this field the alert is enabled. If you leave this field empty, the alert is disabled. If you enter 0, the alert is sent on the day of the activity.

7. Click Save and Close.

Process Learning Alerts Scheduled Job

To ensure alerts are being processed, you can view the results of the Process Learning Alerts job in the from the Scheduled Processes work area. Oracle recommends that you set up this job to run at least twice daily.

Related Topics

- Alerts Composer
- Processes in Oracle Learning Cloud: Explained

Learning Cloud Alerts: Explained

You can to send informational alert notifications to Learning Cloud users to notify them of specific learning events, such as upcoming activity reminders, or changes to offerings. Configure Learning Cloud alerts in the Alerts Composer tool, and enable the ones you want to use in the Learning Cloud setup.

Notifications are triggered based on predefined conditions for two types of alerts:

- Event Alerts: Event Alerts are based on the context provided by the calling client. They’re triggered when a specific event occurs in the application. You can’t modify the triggering criteria for notifications. For example, you can notify a learner when an offering that they are assigned to has changed.

- Resource Alerts: Resource Alerts are based on Oracle Cloud REST API resources. The resources must be deployed in the environment. You can modify the triggering criteria for notifications by defining filters on the resource attributes if you have the required privileges to access the REST resources. The REST endpoints are delivered by Oracle, and you build the alerts. For example, you can send out alerts to all the learners that have required learning within the last 24-hour period. For additional information on configuring these types of alerts, refer to the document called Configuring Resource Alerts Based on REST in Oracle Learning Cloud (Doc ID 2543297.1), support.oracle.com.

Alerts Configuration Overview

The following are the high-level steps you need to follow to enable alerts and make them available to users in Learning Cloud.

1. Create the alert templates in the Alerts Composer.
2. Enable the alerts you want to use in Learning Cloud.

Available Learning Cloud Alerts

You can search for Learning Cloud alerts by Alert Name or Alert Code. All learning notifications start with "WLF". For example, WLF-00001 is the Learning Recommended to Learner alert.
## Alert Name | Alert Code | Description
---|---|---
Learn Custom Alert | WLF-00003 | This is a custom-defined alert that is initiated by an Administrator when viewing assignments. You can configure this alert to be used as an action from the Manage Learners area. When users click Send Alert Action, they can select the template they want to use to send an alert to learners. The alert templates include message text, the recipient, and the communication method (email or worklist).

Learning Cloud Instructor Booking Event Removal | WLF-00009 | Alerts instructors when an Administrator removes one of their instructor-led activities.

Learning Payment Successfully Processed | WLF-00007 | Indicates payment for a learning item was successfully processed.

Learning Recommended to Learner | WLF-00001 | Notifies learners that a learning item was recommended to them.

Offering Activity Definition has Changed for an Instructor | WLF-00008 | Alerts an instructor when an Administrator has changed the details to an instructor-led activity.

Offering Definition has Changed | WLF-00002 | Alerts learners when an Administrator changes the details to an instructor-led activity.

Pay for Learning Item | WLF-00006 | Sends a message to the assignment creator to request that they pay for an offering.

Upcoming ILT Activity to Instructors Reminder 1 | WLF-00004 | Reminds learning instructors when the start date to one of their upcoming instructor led activities is approaching.

### Related Topics
- Alerts Composer
- Processes in Oracle Learning Cloud: Explained
Chapter 7
Social

Social Collaboration with Learning

If the course, specialization, or offering details page has a Social pane, you can invite others to collaborate about the learning item using social collaboration. Conversations remain within the learning item as a historical record.

Examples of collaboration:

- Instructors and learners collaborate on a learning assignment.
- The learner initiates a discussion with other learners to share information about their experience in an offering.
- Community members collaborate and discuss the learning items in the community catalog or assignments.

Collaborating on Learning Items

Tips for collaborating:

- Use the Social pane in the course, specialization, or offering details page. Click Share or click Join if collaboration has already begun.
- Use the Conversations content area in the Communities Details page to watch and participate in community social conversations.
- Click the name of the learning assignment to access its wall and start conversations and add members.
- After collaboration starts for a learning item:
  - Other learners can only participate in conversations after being invited as a member.
  - Learners and instructors can initiate conversations and invite members.
  - On the wall of the learning item, everyone invited can view basic attributes of the learning item and post documents and comments that all members can see.

Enabling Social Network Conversations in Learning: Procedure

Use the settings in the Social Network Conversations tab on the Manage Setup page to enable social network conversations in learning items. When you enable social network conversations, learners view the Social tile and content area in course, specialization, or offering. They can join, share, and collaborate on the learning item with their peers, other learners, or instructors.

You can restrict the social network conversation to enrolled learners only or open it for not enrolled learners too. This topic details the steps to enable global options so that enrolled learners can view and collaborate on all specialist-created content.
Enabling Social Network Conversations

To enable social network conversations at the course, specialization, or offering level:

1. In the Social Network Conversations tab, click Edit.
2. Select Yes for Show Social Conversations for User Created Content.
3. Select Yes for Show Social Conversations for Specialist Created Content.
4. Click Save and Close.

Restricting Social Network Conversations

To restrict social network conversations from all learners to only enrolled learners in the course, specialization, or offering:

1. In the Social Network Conversations tab, click Edit.
2. Select Enrolled learners for each of the following:
   - View Social Conversations on Specialization
   - View Social Conversations on Course
   - View Social Conversations on Instructor-Led Offering
   - View Social Conversations on Self-Paced Offering
   - View Social Conversations on Blended Offering
3. Click Save and Close.

Authoring a Tutorial: Worked Example

This example demonstrates how to create a tutorial, New Employee Handbook, and recommend the tutorial to various members in the organization. You can assemble multiple pieces of mixed-media content in a tutorial. The sections are specific to the tutorial. You can’t reuse them in other tutorials. The content can be self-authored or authored by others, on a specific topic from various sources:

- Content in Oracle Learning Cloud
- Content on your system
- References to content from external sites
- Videos from YouTube

This example comprises the following four tasks in authoring a tutorial:

- Creating a tutorial
- Creating a section with an external video, such as YouTube
- Creating a section with a Web link
- Creating a section with an internal video

Any employee can author a tutorial. You can recommend it to anyone in your enterprise.
Creating a Tutorial

1. On the home page, click **About Me** and then **Learning** to open the **Current Learning** page.
2. Click **Author Tutorial**. You can create a tutorial from the Actions menu in the My Learning and My Team pages.
3. In the **Author Tutorial** page, specify the following attributes:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>New Employee Handbook</td>
</tr>
<tr>
<td>Description</td>
<td>This is the place to get basic facts about the company, and to learn about how Vision Corporation is dedicated to innovation by simplifying IT.</td>
</tr>
<tr>
<td>Cover Art</td>
<td>Upload an image from your desktop to promote your tutorial.</td>
</tr>
</tbody>
</table>

4. Click **Set the Visibility**.
5. In the **Tutorial Visibility** window select **Open** for anyone to find and view the tutorial.

The **Create Section** tile is in the tutorial table of contents.

Creating a Section with an External Video

1. On the Author Tutorial page, click **Add New Section** and complete the fields on the **Author Section** page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Welcome to Vision Corporation</td>
</tr>
<tr>
<td>Description</td>
<td>Vision Corporation thrives because of the exceptional talent we have attracted to our team. Our employees are creating the technologies of tomorrow. Executive Chairman and Chief Technology Officer</td>
</tr>
</tbody>
</table>

2. Click **Add Video**.
3. Click **Search YouTube**.
4. Search by keywords or title, the New Employee Welcome video and click **Select**.
5. Verify the details in the section and click **Done**.
6. Click **Save**.

You can save a tutorial only after you provide the title, description, visibility option, and at least one section. After you save the tutorial, you can come back to the tutorials and build more sections. You can update a tutorial at any time but can’t version it.

Creating a Section with a Web Link

1. On the **Author Tutorial** page, click **Add New Section** and complete the fields on the **Author Section** page:
Your Vision Corporation Career Comes with Unmatched Benefits

Vision Corporation not only provides you with the rewarding career development you’re seeking, but also with unmatched benefits that help you get the most out of your career and your life.

2. Click Add a Web Link.
3. In the Web Link Selection window enter or copy the Web link.
4. Select a cover art image and upload it from your desktop.
5. Click Done.
6. Click Add an Image.
7. In the Image Selection window, specify the image to upload.
8. Click Done and return to the section.
9. Verify the details in the section and click Done.

Creating a Section with an Internal Video

1. On the Author Tutorial page click Add a Section with Video link.
   The Add window appears over the Author Section page.
2. Click Search Learning.
3. Enter a keyword or the video title, Benefits of Working at Vision Corporation and click search.
4. Preview the video and click Select. The video title and description automatically appear in the tutorial section title and description. Review the video title and description and edit them if required.
5. The source link is automatically indicated in the section. Verify the details in the section and click Done.

Tip: You can reorder the sections in the tutorial table of contents by dragging the tiles.

6. Click Save and Close.

   You have now created a public tutorial. You can verify if the tutorial is listed in the My Learning page. You can recommend the tutorial to the selected people or everyone. Accordingly, the tutorial now shows up in the Contributions and Recommendations content areas of the My Learning page.

Publishing a Video: Procedure

Share your knowledge by publishing learning items. You can upload and publish videos or author tutorials in the Current Learning, My Learning, and My Team pages.

You can publish videos as follows:

1. From the Current Learning page, click the Publish Video link.

   You can publish a video from the Actions menu in the My Learning and My Team pages.

2. In the Publish Video window, browse and select the video file. You can also drag and drop the video file.

3. As the video upload process goes on, you can set the options for the video. Enter a Title and Description of the video.
The description you enter is displayed in the About field on the video card.

4. Specify one of the video Visibility options:
   - Select Open so that anyone can search and view the video.
   - Select Secret so that only select people can view the video.

5. If the video is set to Secret, select and specify the people who can access the video.
6. Verify the details and click Publish.

A message appears that the video is under processing and a notification will be sent to you. You can find the video listed in the Contributions content area of My Learning page. You can modify the settings of the video later too.

Fostering a Collaborative Learning Approach: Critical Choices

Many skills evolve too quickly for formal learning plans to keep pace. To remain competitive, encourage grassroots social learning, to complement your formal learning offerings. Social learning helps you maximize performance by equipping your employees with best practices, newest methods, and latest technologies for their work.

To create a positive environment for employee-to-employee learning, you may need to adjust your organization's culture. Managers throughout the enterprise can use their leadership to empower and encourage collaboration and knowledge-sharing.

The following figure depicts the virtuous circle where social recognition and management encouragement inspire growing involvement in social learning.
Remove Barriers to Publication
The first step is to enable practitioners to publish their knowledge with minimal interference. Long approval chains and demanding standards are likely to dampen enthusiasm and prevent timely publication. With a more hands-off approach, you expose varied points of view on topics and help your enterprise community to self-curate. You can also actively engage subject matter experts to publish their content, ensuring that their expertise is shared first.

Note: Depending on your organization requirements, to publish your videos and tutorials may require an approval. For example, if your organization implements an approval for publishing a video, when you upload your video, the application sends an approval request to your concerned approval authority.

Encourage Collaboration
Executives can set an example by actively publishing and sharing insights with your community. Managers contribute by:

- Requiring completion of certain learning items by their teams
- Encouraging peer-to-peer recommended learning
- Assisting workers to find better ways of doing their work using employee-sourced knowledge

By their own example and the expectations they set, managers can foster a sense of communal shared liability for intellectual property.

Recognize and Reward Contributors
Enhanced reputation through Likes and Recommendations of their content will motivate many contributors. But you can assist by recognizing and rewarding your key contributors in other ways, for example at team meetings or events. By surfacing the social credibility of your subject matter experts, you can ensure that the best knowledge rises to the top.

Train on Content Creation
Not everyone has the skills to share their knowledge effectively. If you have experts who are slow to get involved, you can provide training on content creation. As you help employees convey their knowledge in concise and engaging stories, the quality of your learning resources will improve.

Related Topics
- Promoting Learning to Your Team: Points to Consider
- Learning Communities: Overview

Social Learning: Examples
Employees can capture, share, and collaborate around best practices using rich media. This topic suggests some scenarios where businesses can benefit from this social learning.
Sharing Solutions

Services engineers are in the field, solving customer problems. To rapidly share knowledge of solutions, an engineer can publish a video demonstrating a fix to a common customer issue. Through recommendations and sharing on Oracle Social Network, the knowledge can immediately be spread throughout the team.

Best Pitch Video Competition

The stars on your sales team can publish recordings of their sales pitches for new products and services. Or why not harness the competitive spirit and encourage the whole sales team to record their pitches for judging by their peers? The video with the most Likes is the winner.

Best Practices

Subject matter experts find the most effective approaches through their experience. You maximize the return on that experience if these experts share their knowledge in an engaging video or tutorial. For example, a field technician might publish a tutorial on installation best practices for a new offering.

What's the difference between a video and a tutorial?

A video is a type of media content that is recommended to other learners.
A tutorial is a collection of multiple pieces of mixed-media content that is specific to a particular topic.
The video tile has a Play icon while tutorial has a View button.
The video or tutorial content can be self-authored or authored by others.
Manager Self-Service

Promoting Learning to Your Team: Points to Consider

You can require or recommend learning items to your team, to help them stay up-to-date and remain compliant. You can also encourage your team members to publish videos and tutorials to share best practices.

To access these learning pages, select My Team > Learning on the home page.

Required and Recommended Learning

On the Current Learning page, you can browse published learning items. When you find items of value to your team, you can:

- Recommend videos and tutorials to individuals or teams, with a short note to encourage them to view.
- Require completion of the videos by an individual or team. You can set a due date and include a short note.

You can only recommend or require public learning items. If the author restricted visibility to a set of users, the Recommend and Require links are not available for that item.

Tracking Completion of Learning

Use the My Team’s Required Learning page to review the number of completed, incomplete, and overdue required learning items across your team. You can view an individual’s status on the learning item, the person who required the learning item, and the due date. Viewing options include:

- By due date
- By direct report
- Required by others

Publishing

Promote best practices in your team by encouraging subject matter experts and star performers to share their knowledge or techniques. Anyone can publish a video or author a tutorial, which is a sequence of items such as web pages, videos, or documents.

Related Topics

- Authoring a Tutorial: Worked Example
- Publishing a Video: Procedure

Recommending a Learning Item: Procedure

Share your knowledge by recommending learning items. You may want to recommend learning items to your team or your peers.
You can recommend a learning item to an individual or a group from the learning item card or learning item details page. To recommend an item, do the following:

1. From the learning item card or details page, click the **Recommend** icon.
2. In the **Recommend Learning** window, enter a note mentioning why you recommend the learning item.
3. Search for and select the people or groups to whom you recommend the learning item.
4. If you selected a team, you can exclude individual members of that team by clicking the **Exclude Anyone** link.
5. Search for and select the people to exclude.
6. Click **Submit**. You get a confirmation that the recommendation is sent to the selected people.

**Note:** Your recommendations are listed in the **Recommendations** content area of the **My Learning** page, whereas the recommendations you received are made available on the **Current Learning** page.

The learning item cards on the Current Learning page show the number of views and likes, and the names of the people who recommended the items to you.

**FAQs for Manager Self-Service**

**Can a learning item be required and recommended?**

Yes. A learning item can be set as required and recommended by the same person or you can set the learning item as required to certain people and recommend the same to others.
9 Employee Self-Service

My Learning Page: Explained

As a learner, all your learning is tracked on the **My Learning** page. Your learning assignments, recommendations, published items, your viewing history, and your communities information is presented to make informed decisions.

The **My Learning** page has the following tiles and content areas:

- Current Learning
- Requested Learning
- Past Learning
- Contributions
- Communities
- Recommendations

Your manager or anyone in your management hierarchy can view all aspects of your learning in the **My Learning** page, excepting your viewing history.

Your coworkers can view your published learning, your communities to which they belong or manage, and your recommendations.

Current Learning

The **Current Learning** tile shows the number of overdue assignments. Review your **Required Learning** and **Voluntary Learning** assignments including the recently completed learning items, in progress, not started, and upcoming items. Each learning item shows the item name, item type icon, the name of the person who assigned the item (for required assignments), the number of days in which it has to be completed or is overdue (for required assignments), and the duration remaining to complete (if this information is available). You can start or resume learning from here. The required learning assignments appear in the following order:

- Overdue
- Upcoming
- Completed

Requested Learning

The **Requested Learning** tile shows a number of requested learning items. The requested learning items are listed in the **Requested Learning** content area sorted by the most recently requested date first. It includes details such as requested date, requested status, and the target learning period. You can modify your request and submit it again. You can cancel your learning requests.
**Past Learning**

The **Past Learning** tile shows learning items you have previously completed. Each learning item row includes title, date when it was completed, and the actual effort. You can search for your past learning items by keyword, completion date, and completion status. You can use the saved searches given in the application:

- Completed Assignments Only
- Required Learning
- Voluntary Learning
- Withdrawn Assignments Only

**Contributions**

The **Contributions** tile shows the number of learning items you have published. Each learning item card includes the number of views, the number of times it was recommended. If you hover over the thumbnail of item, it shows the duration of the video or the number of sections in the tutorial. You can recommend the learning item from the card itself or drill down to the Learning Item Details page and perform other actions such as Like, Recommend, or Require. You can edit the learning item and modify it. You can search for learning items by keywords or creation date. You can also use the saved search items in the application:

- Videos
- Tutorials
- Created in the Last 30 Days

> **Note:** If you haven’t published any learning items, no learning items appear in the **Contributions** content area.

**Communities**

The **Communities** tile shows the number of learning communities you have joined or manage. The communities you manage or are a member of are tracked in the **Communities** content area. You can keep track of any communities where your join request is pending approval. Click on the community name in the card to open the Community Details page. In the **Managed Communities** section, to open the community in manage mode, click **Manage Community**.

**Recommendations**

The **Recommendations** tile shows the number of recommendations you have provided to others. The content area shows you the items you have recommended and the learning items recommended to you appear in the **Recommendations** content area. In the case of Items Recommended to you, the learning items appear in cards with the name of person who recommended it to you, their recommendation note, title, learning item type icon, number of times the item was recommended and the number of likes it has received. You can further recommend the learning item to other learners. In the case of Items Recommended by you, the case show the card shows you the learning item thumbnail, the title, the learning item type icon, and how many people you have recommended this item to. You can click the Recommend icon on the card to recommend it again.

**Related Topics**

- Creating a Learning Community: Procedure
- My Learning Communities: Explained
• Recommending a Learning Item: Procedure
• Authoring a Tutorial: Worked Example

Searching for Learning Items: Explained

In the Current Learning page, you can search for learning items, people, communities in the search box. You can search for learning items based on the learning type such as video and tutorials.

Search Options

As you enter the search term, matching learning items are suggested in the search box grouped by Learning Item Type and Person. You can:

• Select and view the item.
• Click the More link under a category and view all the items.
• Click the Search icon or press Enter to view the full set of search results, sorted by publication date, in the List or Grid view.

How Keyword Search Works

When you create or update a learning item, the Rebuild Learning Item Indexes job runs automatically. It rebuilds indexes to provide search results for learning items in Oracle Learning Cloud. This job takes the metadata fields associated with the learning item and concatenates them together into one field called the "index field". When a user performs a keyword search, Oracle Learning Cloud looks at the index field for each learning item to determine the order in which they should be presented in the search results set.

Note: Search is case insensitive, meaning usage of upper or lowercase letters does not matter. Stop words such as "and", "the", "a", and "as" are ignored.

Relevancy Ranking

Relevancy ranking is determined based on the score that is given for a learning item based on the keywords entered in the search, and the values that are present in the index field. The score of an item is determined by one or more keyword algorithm. The keyword search algorithms look at different things during a keyword search to determine the relevancy ranking for that item. Scores are computed by the Oracle text engine, which selects the highest score, and eliminates duplicate results.

• Scores greater than or equal to 70 are high scores.
• Scores between 30 and 69 are medium scores.
• Anything less than 30 is a low score.

Keyword Algorithms

There are three keyword algorithms, and they run in the following order:

1. Exact Match
2. Word/Token Occurrence
3. Fuzzy Results

The search starts with the first algorithm, and moves on to the next algorithm, terminating when it finds a match. For example, if an Exact Match is found for all the keywords on the course name, the score is recorded, and the subsequent algorithms (Word/Token and Fuzzy Results) are not processed.

Exact Match

This algorithm looks at the values in the learning item index for an exact match in the keyword. The items found in the Exact Match algorithm receive the highest relevancy ranking scores. The fields listed below are the fields that get concatenated together in the learning item index field. In the Exact Match algorithm, these fields are scored differently based on where the exact match is found. The Exact Match algorithm relevancy is processed in the following order:

1. Course and Specialization Name
2. Course and Specialization Description
3. Course Short Description
4. Offering Name
5. Offering Description

The relevancy score starts with the Course Specialization Name, and gives this the highest score. It then progresses down the list of fields to Offering Short Description, giving this a lower score. In the Exact Match algorithm, the score is typically greater than or equal to 70, because it is considered high match.

- If the keyword search is "Java Advanced", courses and specializations that have "Java Advanced" in the name are scored higher than courses and specializations that do not have an exact match in the name (for example, "Java Programming Advanced").
- If the keyword search is "Java Advanced", courses and specializations that have "Java Advanced" in the name score higher than courses and specializations that do not have "Java Advanced" in the name, but which do have "Java Advanced" in the description.
- If the keyword search is "Java Advanced", courses and specializations that have "Java Advanced" in the description score higher then offerings that don’t have "Java Advanced" in the parent course name, description, or short description, but which do have "Java Advanced" in the offering short description.

If no Exact Match word occurrence is found, the search moves on to the Word/Token Occurrence algorithm.

Word/Token Occurrence

The Word/Token Occurrence algorithm looks at the values in the learning item index for occurrence of the keyword. It finds items that contain at least one occurrence of any of the token in name or description columns. The Word/Token Occurrence algorithm scores items based on how many words are found, and the frequency with which they are found. In the Word/Token Occurrence, the score is typically between 30 and 69. These are considered medium scores.

- In this algorithm, each search is split into individual words.
- Search items that contain at least one occurrence of any word:
  - The returned items are ranked by a cumulative score based on how many words are found (and how frequently).
  - It first scores based on how many words are matched in the learning item.
  - It then scores on how many times the word is found in the learning item.
For example, scores are divided into ranges:

- In a two-word search for "Data Structures" the following happens:
  - If both words match, the score is between 51 and 100.
  - If one word matches, the score is between 1 and 50.
  - If a word is repeated multiple times in the item, based on the frequency, the score increases.

- In a three-word search for "Java Data Structure" the following happens:
  - Matching one word scores between 1 and 33.
  - Matching two words scores between 34 and 66.
  - Matching all three words scores between 67 and 100.

The Word/Token Occurrence algorithm is processed in the following order:

1. Course and Specialization Name
2. Course and Specialization Description
3. Course Short Description
4. Offering Name
5. Offering Description

If no Word/Token Occurrence match is found, then the search goes on to the Fuzzy Match algorithm.

Fuzzy Results

This algorithm looks at the values in the learning item index for “fuzzy matches” which are similarly spelled, but not exact words. Fuzzy matching provides stemming, which enables you to match words with the same linguistic root. For example, a Fuzzy Match search for the word "speak" also searches for all items that contain "speaks", "spoke", and "spoken". Fuzzy Match searches analyze each token in the search keyword, looking for items that "sound like", contain typos, or that are similar. For example:

- A search for the word "Data" also returns records with "Date" in name or description.
- A search for the word "Maps" returns items containing either "Maps" or "Map" or "Mass" in the name or description.

In the Fuzzy Match algorithm, a fuzzy match is scored the lowest (less than 30). The fuzzy match algorithm is processed in the following order:

1. Course and Specialization Name
2. Course and Specialization Description
3. Course Short Description
4. Offering Name
5. Offering Description

The relevancy score starts with the course and specialization name, and gives this the highest score. Then it progresses down the list of fields to offering short description, giving it a lower score. For example:

- If the keyword is misspelled, courses and specializations that have the correctly spelled term in the name are found and scored higher than courses and specializations that do not have any term that matches a fuzzy search.
- If the keyword search is "Java Advanced Course" (singular), courses and specializations that have "Java Advanced Courses" (plural) in the name are scored higher than courses and specializations that do not have any term that matches a fuzzy search.

STOP WORDS
Enrolling Yourself in Learning Items: Procedure

When you come across learning items that may help you grow and aid in reaching your goal, you can register for a course, offering, or specialization. Registering for a course doesn’t automatically register you for the offering. So you need to register for an offering separately later.

1. From the Current Learning or My Learning pages, search for and select a course or specialization.
2. Review the details and click:
   - Join to register for a specialization
   - Start Learning to register for a self-paced learning item
   - Register to register in an instructor-led training offering

Note: If you don’t find the Start Learning button, it indicates that no offerings are currently available.

The Voluntary Learning card in the Current Learning and My Learning pages tracks your personal learning items you have registered for.

Completing an Evaluation: Procedure

Evaluation is displayed automatically after you complete an offering. For an instructor-led offering, evaluation is displayed when you mark the offering complete, or you will have the option to complete the evaluation in case you are unable to mark yourself complete. If you aren’t required to complete an evaluation for an offering, then you can mark yourself complete. You can submit an evaluation only once so ensure that you review the response before submitting.

To complete and submit the evaluation:

1. Complete the evaluation.
2. Click Submit. A notification is displayed indicating that the evaluation has been completed.

Courses and Specializations for Learning Outcomes: Worked Example

Learning results in certain outcomes. When these outcomes are specified in the courses and specializations, you can review the outcome details to determine if the outcome will benefit you based on your talent profile, current job, or job you have identified in your career path. When you complete the course or specialization, these outcomes will be added to your talent profile.

This example shows how to find courses or specializations that deliver specific learning outcomes and review the benefits. In this example, you look for courses to improve your French language skills.

You use learning outcomes on the course or specialization details page to review the benefits for your profile and enroll for it.
Finding Courses and Specializations for Learning Outcomes

To search for courses that deliver a specific outcome:

1. Click Navigator > About Me > Learning.
2. On the Current Learning page, enter a keyword related to the learning outcome in the search box. Courses and specializations with this learning outcome appear in the search results.
3. Select the course and click the Learning Outcome Details link on the course details page.
   In a specialization, click More Actions and then Learning Outcome to view the learning outcomes.
   In the Skills and Qualifications window you can find the What You Will Achieve region. The area will identify if the outcome benefits you based on what you have in your talent profile, current job, or job in your career path. Check the learning outcome for French in the Languages region. You can find the Reading, Writing, and Speaking levels. The ability to teach and translate the language is also specified.
4. Click OK to return to the course or specialization.
   If you enroll and complete the course or specialization, your talent profile reflects the specified speaking, reading, and writing skills in French that were associated to the course or specialization.

Related Topics
- What’s a competency gap chart

Request Learning Item From Learning Catalog: Procedure

You can submit a request for offerings, courses, or specializations. When a request is approved and set to Active, you will see the Start Learning button on the learning item. Managers can request learning for their team members and learning items may be considered as an approved request by default. However, the administrator must set it to Active for the learner to start learning.

Request Learning for Learning Items in Learning Catalog

As a learner, you can request a learning item in the Learning Catalog by doing the following steps:

1. Search for and select the learning item. It can be an offering, course, or a specialization.
2. In the Learning Item Details page, select Request Learning.
   \(\text{Note:}\) If you find the Start Learning button, you can start learning immediately.
3. For a course, the offerings in the course are listed by offering type. You can choose the entire course first and then the offerings within the course later. Otherwise, you can selectively choose offerings in the course. Select the course or offerings you want to request for learning.
4. You can specify your training needs on the Request Learning page. The title and learning item type appear in the page.
5. Select the date you want to Start After and Complete By.
6. Enter the Justification for learning enrollment.
7. Click Submit.

Learners can track their requests in the Requested Learning content of My Learning page.

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3. For a course, the offerings in the course are listed by offering type. You can choose the entire course first and then the offerings within the course later. Otherwise, you can selectively choose offerings in the course. Select the course or offerings you want to request for learning.
4. You can specify your training needs on the Request Learning page. The title and learning item type appear in the page.
5. Select the date you want to Start After and Complete By.
6. Enter the Justification for learning enrollment.
7. Click Submit.

Learners can track their requests in the Requested Learning content of My Learning page.

Request Noncatalog Learning Item: Procedure

Managers and Learners can request new catalog items. If you search for a learning item find no results, you can use the Request Noncatalog Learning task to add a learning item.

Request Noncatalog Learning

As a learner, you can request a learning item not in the catalog by doing the following steps:

1. From the Learner dashboard, click the Actions menu and select Request Noncatalog Learning.
2. Enter a title for the learning item. This may not be the final title of the course, but provides a guideline for subject matter and target audience.
3. Optional: Enter a Description that clearly defines the content you have in mind.
4. Optional: Provide an estimate for the Expected Training Hours.
5. Optional: Enter a Price estimate and select a Currency.
6. Optional: Indicate the target date you want to Start On or After and Complete By.
7. Optional: Enter Comments for your request.
8. Click Submit.
9. Click OK to acknowledge successful submission of the request.

The learning request routes to the appropriate party for approval, who may be a learning administrator, representative, or other party, as designated in system rules. If the request is approved, when a new learning item is added to the catalog and activated, the learner can start learning.

A manager can track the team’s requested learning on the My Team page. Learners can track their requests from Requested Learning on My Learning page.

FAQs for Employee Self-Service

What's the difference between required learning, voluntary learning, and recommended learning?

Required learning consists of learning items assigned by a manager to be completed within a specific date. For example, your manager may consider a particular video relevant and mandates the training to the whole team. If you don’t complete the training in the specified period, it’s listed under your Overdue items.

Voluntary learning consists of learning items that don’t have a required completion date. It includes courses or specializations in which you enrolled yourself, and items your administrator enrolled you in, without a due date.

Recommended learning consists of learning items assigned to you by anyone. These learning items are not mandated and you can dismiss them. One or more people can recommend a learning item, and you can view their names on the learning item card.

Both your required and voluntary learning is tracked on the Current Learning and My Learning pages separately with crucial details that help you to organize better. The number of Likes and Views on the learning item card indicate the popularity of the item. The learning items in the Voluntary Learning card or Required Learning card indicate the status of learning and enable you to resume or start or restart your training accordingly.

How can I withdraw from an offering, course, or specialization?

Click More Actions, select Withdraw on the offering, course, or specialization details page. Select the withdrawal reason and specify comments in the Withdrawal window. You can’t withdraw from required learning items or items that you have already completed.

How can I complete an offering?

Click Mark as Complete when you complete an offering provided there is no required evaluation for the offering. This is applicable for instructor-led online, instructor-led on site, and self-paced offline offerings. For offerings with required evaluation you can’t mark yourself complete until you complete and submit the evaluation.
Glossary

**AICC**
The Aviation Industry Computer-Based Training Committee (AICC) was a group of technology-based training professionals who developed guidelines for computer-based training for the aviation industry. These guidelines are now commonly used by other industries to manage their learning requirements. The application supports importing learning content that conforms to the AICC specification.

**content item**
An individual quality, skill, or qualification within a content type that you track in profiles.

**content type**
An attribute such as a skill, quality, or qualification that is added to a profile.

**course**
An entity in the learning catalog that provides generic information about the learning item. An offering is created for a course and includes specific details such as delivery mode and enrollments.

**learning catalog**
The single point of access for all learning objects, including courses, offerings, and specializations.

**learning outcome**
A skill, competency, or certification acquired on completion of a learning assignment.

**person profile**
A collection of skills, experience, qualifications, work preferences, and career planning information for a worker.

**rating model**
A scale used to measure the performance and proficiency of workers.

**SCORM**
A specification developed by the Advanced Distributed Learning (ADL) group to enable sharing of online content across learning platforms. You can import content that is SCORM 1.2 or SCORM 2004 (Edition 2 and Edition 3) compliant.

**specialization**
A logical grouping of courses aimed to help learners achieve learning goals that a single course can’t achieve. A specialization contains one or more sections, which are containers for the courses.