

# Oracle Fusion Cloud Talent Management

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**Using Learning**

23D



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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

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.

## Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

## Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

## Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

## Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!



# 1 Guide and Application Overviews

## About the Using Oracle Fusion Cloud Learning Guide

This guide is primarily for learning administrators and contains the concepts and tasks to create and manage the learning catalog, learning assignments, and learning recommendations. It also covers the self-service **Me > Learning** and **My Team > Learning** tasks at the end.

The Implementing Oracle Fusion Cloud Learning guide is primarily for implementers and application administrators. It contains the concepts and tasks to implement Oracle Learning and integrate with external content providers and virtual classroom providers.

## What's Oracle Learning

Oracle Fusion Cloud Learning is a skills-driven learning platform that lets individuals, teams, and organizations develop the relevant sets of competencies. It combines formal and informal learning from an internal catalog and external providers for a unified learning experience.

- Workers across the organization can discover and consume learning that's relevant to their job roles and careers of interest. They can access and complete learning online and offline from various devices, including computers and mobile devices.  
  
They can also assemble, share, and collaborate on best practices using rich media.
- Subject matter experts can create and publish high-quality content to share their knowledge with the rest of the organization, and gain recognition for their contributions.
- Managers can recommend learning to their teams and track their progress.
- Learning administrators can assemble online offerings, courses, and specializations. They do this using videos, PDF documents, web links, and content from external providers. They can also use SCORM-compliant and AICC-compliant content.

They and HR specialists can also deploy and track compliance and development-based learning across multiple levels of the organizational hierarchy.



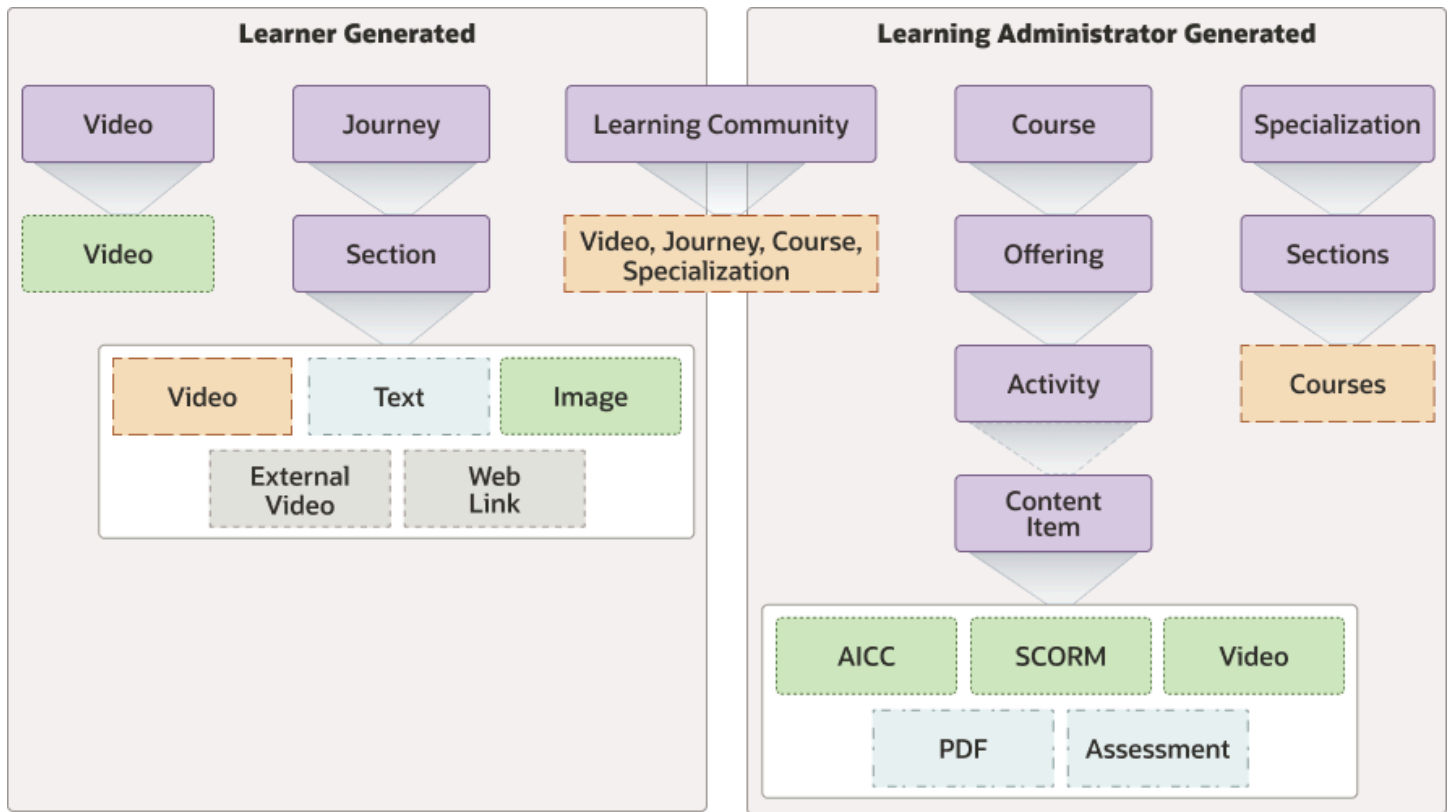
## 2 Key Terminology

### Oracle Learning Items Overview

Learners can generate videos and learning journeys for the learning catalog. Learning administrators can generate courses, offerings, and specializations. Learning community catalogs can include content generated by both groups.

- Learner-generated learning items can include videos, external videos, text, images, and web links that they assemble and publish.
- Learning-administrator-generated learning items can be courses or specializations.
  - A course consists of at least one offering. An offering includes at least one activity with at least one content item. Supported content item types are: AICC, SCORM, PDF, assessment, and video.
  - A specialization consists of sections that reference specific courses.

Learning items can be Oracle or nonOracle learning objects and they can reference Oracle learning objects. And they can be stored in Oracle Learning or hosted by a third party, such as LinkedIn Learning and SkillSoft.



**Legend:**

NonOracle Learning object		Oracle Learning object	
Third-party hosted		Stored in Oracle Learning	
Reference to Oracle Learning object			



The remaining topics in this chapter provide explanations about and examples of what courses, offerings, activities, and specializations mean in the context of Oracle Learning. They also explain how learning prerequisites and outcomes work for courses and specializations. They explain the difference between assessments and evaluations in Oracle Learning. And they explain what Oracle learning communities are.

## Course Definition for Oracle Learning

A course defines the requirements and outcomes for the learning content and the achievements learners get after completing the course. A course consists of learning objectives, one or more offerings, and corresponding learning activities.

For example, here's what the learner should be able to do after completing your organization's Microsoft Word Basics course:

- Identify the standard menus.
- List and describe multiple actions available on each menu.
- Apply specified basic formatting to provided content.

Typically, the course syllabus includes these objectives.

To complete a course, the learner enrolls in an offering and completes the associated learning activities.

## Course Offerings Definition for Oracle Learning

Course offerings represent the delivery method for the learning activities that learners complete to achieve the course objectives. They can include instructor-led training in person (ILT) or online (VILT), self-paced training, or a combination of these delivery methods.

For example, your company offers a Microsoft Word Basics course with blended Introduction to Microsoft Word Features offerings. To make the course more accessible to its global workforce, your company includes multiday VILT and ILT offerings from locations on multiple continents. The course also includes self-paced offerings. Both the ILT and self-paced content is available in offerings with different languages, such as English, French, German, and Spanish. Depending on how offering setup, learners might see only the offerings in their language.

Learners enroll in the course offering that works best for them. When they complete the learning activities for that single offering, they complete the learning objectives for the course.

### Course: Microsoft Word Basics

Offering: VILT online Jan 24 -- 26, 2021 8:00a -- 5:00p IST

Offering: ILT Geneva, CH Jan 24 -- 26, 2021 8:00a -- 5:00p IST

Offering: 3-day self-paced in Spanish Enrolled

ILT and VILT offerings have a primary instructor from inside your company or from a training supplier outside your company. They can also have a primary physical or virtual classroom location. This information helps learners decide which offering to enroll in.

## Learning Activities Definition for Oracle Learning

Learning activities are the actual work that learners complete to complete the course and achieve the learning objectives. Or they're descriptions of where, how, and when learners complete the learning. Activities can be required or optional for course completion.

Learning activities can include these types of content:

- Online content developed using SCORM (Sharable Content Object Reference Model) or AICC (Aviation Industry Computer-Based Training Committee) standards
- Instructor-led on-site and virtual activities
- Videos
- PDFs
- Web links
- Assessments that test understanding
- Evaluations that get feedback about completed courses

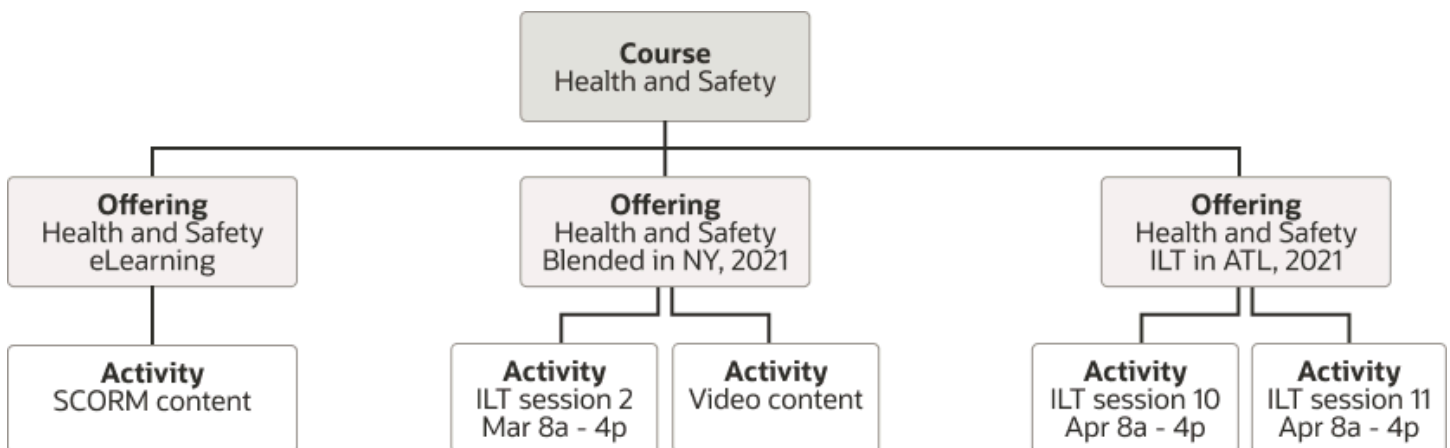
ILT and VILT activities have an instructor from inside your company or from a training supplier outside your company. They also have a physical or virtual classroom location. Learners use the location information to get to or join the learning when it starts.

# Example of How a Course, Offerings, and Activities Work Together in Oracle Learning

A course contains one or more offerings, which in turn contain one or more activities. Each offering covers the same learning, just using a different method, time, or place. You only need to complete one offering to complete the course.

In this example the Health and Safety course contains these three offerings, each with their own activities:

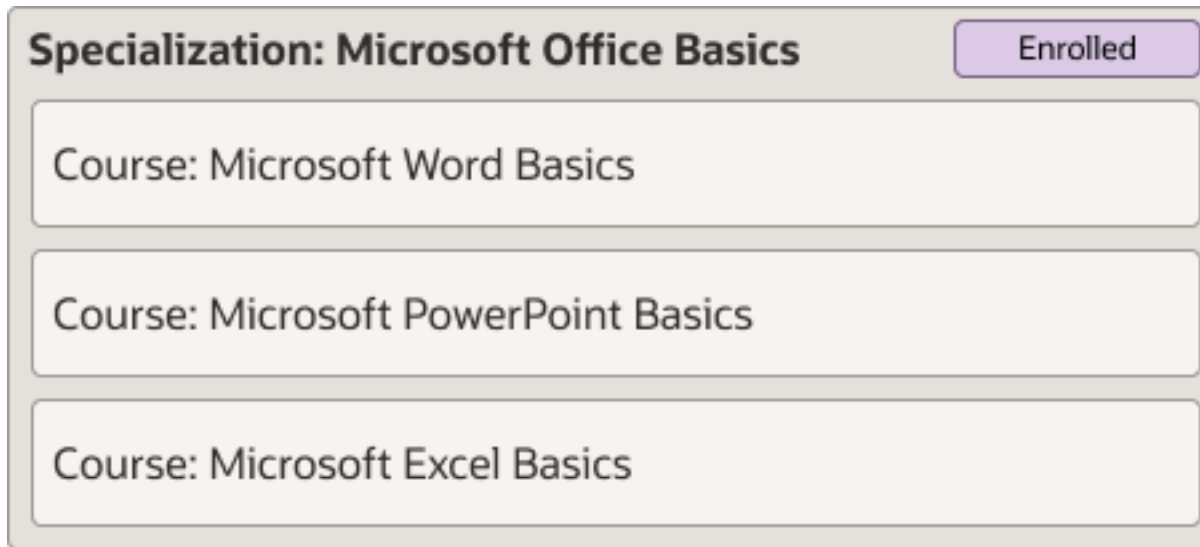
- An eLearning, or self-paced offering that learners everywhere can complete at any time
  - The associated activity consists of SCORM content.
- A blending offering that's available in New York in 2021
  - One associated activity is an instructor-led training (ILT) session in March from 8:00a to 4:00p.
  - The other associated activity is video content that learners complete online.
- An ILT offering in Atlanta in 2021
  - The two associated ILT sessions are in April from 8:00a to 4:00p



## Specialization Definition for Oracle Learning

A specialization includes multiple courses. And it holds broader learning objects that learners achieve when they complete all the required courses.

For example, your organization offers a Microsoft Office Basics specialization that includes the Microsoft Word Basics, Microsoft PowerPoint Basics, and Microsoft Excel Basics courses.



The screenshot displays a user interface for a specialization. At the top left, the text reads "Specialization: Microsoft Office Basics". To the right of this text is a purple button labeled "Enrolled". Below this header, there are three stacked rectangular boxes, each containing the text "Course: Microsoft Word Basics", "Course: Microsoft PowerPoint Basics", and "Course: Microsoft Excel Basics" respectively.

And the specialization includes these learning objectives:

- Identify the menus that are common among all Microsoft Office applications and the menus that are unique to each application.
- Identify menu actions that are common among all Microsoft Office applications and actions that are unique to each application.
- Apply specified basic formatting to content provided for each application.

Typically the specialization description includes these objectives.

## Prerequisites Definition for Oracle Learning

Courses and specializations might have prerequisites, which are skills and qualifications managed in the learner's talent profile. Prerequisites can include competencies, honors and awards, languages, and licenses and certifications, and learners must meet them before they can enroll.

For example, a learner needs basic Microsoft Word skills before they can enroll in your organization's Advanced Microsoft Word course. Or, to enroll in the instructor-led Spanish offering for the course, the learner must be fluent in Spanish.

Specialization prerequisites are independent of any prerequisites for the courses that make up the specialization. For example, your company's Advanced Microsoft Office specialization requires learners to have basic competencies in Microsoft Word, PowerPoint, and Excel. The specialization includes the Advanced Microsoft Word course, which requires intermediate experience with Microsoft Word. Learners can start the specialization if they have the basic certifications. They can't start the advanced course, however, until they also have the intermediate-level skill.

**Specialization: Advanced Microsoft Office** Enrolled

**Prerequisite: Certifications in Microsoft Word Basics, Microsoft PowerPoint Basics, and Microsoft Excel Basics**

**Course: Advanced Microsoft Word**

**Prerequisite: Intermediate experience with Microsoft Word**

Offering: VILT online Jan 24 -- 26, 2021 8:00a -- 5:00p IST

Offering: ILT Geneva, CH office Jan 24 -- 26, 2021 8:00a -- 5:00p IST

Offering: 3-day self-paced in Spanish Enrolled

Course: Microsoft PowerPoint Basics

Course: Microsoft Excel Basics

Learners can see any course or specialization prerequisites on the details page. They can also see whether they achieved each prerequisite, per their current talent profile.

## Learning Outcomes Definition for Oracle Learning

Courses and specializations can optionally include learning outcomes. These outcomes essentially reflect the learning objectives that map to skills and qualifications in the learner's talent person profile.

After learners successfully complete the course or specialization, Learning automatically adds the specific skills, competencies, or certifications to their talent profile. For example, after a learner successfully completes the Microsoft Word Basics course, they get a certification.

**Course: Microsoft Word Basics**

**Learning Outcome: Certification in Microsoft Word Basics**

Offering: VILT online Jan 24 -- 26, 2021 8:00a -- 5:00p IST

Offering: ILT Geneva, CH office Jan 24 -- 26, 2021 8:00a -- 5:00p IST

Offering: 3-day self-paced in Spanish Enrolled

After they successfully complete the Microsoft Office Basics specialization, they get certifications for Microsoft Word Basics, Microsoft PowerPoint Basics, and Microsoft Excel Basics.

**Specialization: Microsoft Office Basics** Enrolled

**Learning Outcome: Certifications in Microsoft Word Basics, Microsoft PowerPoint Basics, and Microsoft Excel Basics**

Course: Microsoft Word Basics

Course: Microsoft PowerPoint Basics

Course: Microsoft Excel Basics

## Assessment Definition for Oracle Learning

Assess a learner's understanding of the course material at any point during an offering, using a learning assessment questionnaire.

Typically, assessments are the first activity if they're designed to assess knowledge before the learner starts the offering. They're the last activity if they're designed to assess whether the learner met the learning outcome requirements.

## Evaluation Definition for Oracle Learning

Get feedback about an offering from learners after they complete it using a learning evaluation questionnaire. Self-paced, instructor-led, and blended offerings can include evaluations and can be required or optional.

## Learning Communities Definition for Oracle Learning

Learning communities can be formal and organize learning catalog content into categories and topics that make browsing and discovery more intuitive for learners. For example, they group content around areas of interest, such as finance or technology.

They can also be informal collaborative communities that people at your company create and share. Here are some examples of how people can use learning communities:

- A learning administrator creates a Health and Safety community and assigns it to people who work with dangerous chemicals or equipment.
- A manager creates a community for everyone on the team to help people gain important knowledge and skills to successfully complete organizational objectives.
- A finance domain expert at your company creates a community as a central method to distribute the most recent financial learning items. Members also participate in discussions related to finance, such as the latest regulations and their effects on policies and supporting technology.
- A team leader for user experience design creates a community where members can publish their design insights. They can also share interesting design-related articles, videos, and tutorials.





# 3 Prerequisites and Learning Outcomes for Courses and Specializations

## Oracle Learning Prerequisites and Outcomes, and Talent Prerequisite and Person Profile Types

You can configure prerequisites and learning outcomes for courses and specializations if you have Oracle Fusion Cloud Talent Management. Prerequisites come from the Prerequisites profile type. Learning outcomes come from the Person profile type.

If you have Oracle Fusion Cloud Dynamic Skills, your configurations will include skills and skill levels.

### *Related Topics*

- [Prerequisites Definition for Oracle Learning](#)
- [Learning Outcomes Definition for Oracle Learning](#)
- [Content Section Access](#)
- [Overview of Dynamic Skills](#)
- [Activate Oracle AI Apps for Talent Management](#)

## Prerequisites Profile Type for Oracle Learning Course and Specialization Prerequisites

To configure prerequisites for learning courses and specializations, make sure that the Prerequisites profile type is active. Use the Profile Types task on the **My Client Groups > Profiles** page.

You can add relevant content sections to the profile type. And for each content section, you can specify which fields to show or hide. The selection affects the configuration pages that learning administrators use. They also affect course and specialization search results and the details pages that learners can see.

### *Related Topics*

- [Prerequisites Definition for Oracle Learning](#)
- [Content Section Access](#)

# Person Profile Type and Learning Outcomes for Oracle Learning Courses and Specializations

To configure learning outcomes for courses and specializations, make sure that the relevant content sections for the Person profile type include the Learning Outcomes subscriber. Use the Profile Types task on the **My Client Groups > Profiles** page.

You can sync learning outcome Display selections to the content section properties. Or you can configure separate Display selections that apply to only learning outcomes pages. For example, the Licenses and Certifications content section properties might hide the Actual Completion Date property, but learning outcomes need to include it.

These are the Display options you can select from:

- **Hide:** Don't show the attribute.
- **Summary:** Show the attribute in the Summary view.
- **Detail:** Show the attribute in the Detail view.

The display selection affects the configuration pages that learning administrators use. It also affects course and specialization search results and the details pages that learners can see.

### Related Topics

- [Learning Outcomes Definition for Oracle Learning](#)
- [Content Section Access](#)

## Suggested Skills to Set as Learning Outcomes

Use Skills Advisor for Learning processes to get skills suggestions that you can accept or reject as learning outcomes when you configure an Oracle Learning course or specialization. When you accept a suggestion, you can also set the skill level.

By default, suggestions are based on the course or specialization title, description, and short description. But you can create filtered lists with other criteria to use to generate skill suggestions, including these criteria:

Criteria	Applies To
Learning item type	Only courses or specializations
Featured items	Only featured items
Default view mode	Only items visible in the learning catalog
City	Course offerings in a specific city
Delivery mode	Courses offered as self-paced, instructor-led or blended
Learning outcomes	Learning items that already have or don't have specific learning outcomes defined

Criteria	Applies To
Skill and skill level	Learning items that already have or don't have specific skills or skill levels defined
Publish start and end dates	Learning items published in specific date ranges
Created by	Learning items created by specific learning administrators

You can also create process templates on the Skills Advisor for Learning page. The templates use different filter lists to generate skill suggestions for specific sets of courses and specialization. For example, you create separate process templates to get skill suggestions for all learning from SkillSoft and all learning from LinkedIn.

Only suggestions that you or another learning administrator accepts become learning outcomes. And you can run the skills advisor process on items you already curated.

You need to complete and save the general information for all courses and specializations that you want to get skills suggestions and skill levels for. Then next time the Skills Advisor for Learning background process runs, the results will include suggestions for those courses and specializations.

#### Related Topics

- [AI Suggested Skills for Learning Items](#)

## Curate Suggested Skills on the Learning Outcomes Tab

You can curate skills suggested by the Skills Advisor for Learning processes on the Learning Outcomes tab of the Oracle Learning course or specialization.

- To accept a suggestion as a learning outcome, in the Curation field, select **Yes**. Doing this also changes the skill curation type to Skill added by administrator.
- To reject a suggestion, select it and click the **Delete** icon.

Leaving the curation status as No means you aren't rejecting the suggestion, but also don't consider it a learning outcome now. If you change any attribute of the suggestion, such as the skill name or level, the skill curation status changes to Skill added by administrator.

## Curate Suggested Skills for Learning in the Integrated Workbook

You can curate the skills suggestions in an integrated Microsoft Excel workbook and set the corresponding skill level.

The workbook is available from these places:

- On the Skills Advisor for Learning Processes page. Open the workbook by clicking the Update Skills in the appropriate process row
- On the Learning Outcomes tab of existing courses and specializations.

- On the **Tools > Scheduled** page, as the output file for the AI Suggested Skills for Learning Items process. The process results contain no more than 5,000 skill suggestions ordered alphabetically by learning item number. This means that the oldest courses and specializations appear first.

To accept a suggestion as a learning outcome, in the Include Suggested Skill field, enter Y. Also set the applicable skill level. If you don't do it here, then you'll need to do it manually on the Learning Outcomes tab later.

After you finish accepting all applicable suggestions and setting the skill levels, at the top of the workbook click **Upload**. The Upload process ignores any suggestions with Include Suggested Skill set to N or marked as Delete.

To reject a suggestion, double-click in the Deleted field. You should see a blue dot appear. After you finishing rejecting all applicable suggestions, at the top of the workbook click **Delete**. The Delete process ignores any suggestions that aren't marked for deletion.

## Skills Advisor for Learning Curation Results

Here's what happens in Oracle Learning when you set the skills curation status to Yes or No, or when you delete a suggestion:

- Any skill suggestions where you set the skills curation status to Yes show on the course or specialization details page, definitions tab. So do the selected skill levels. These skills and skill levels are the only skills that transfer to learners' talent profiles after they complete the learning.
- Any skill suggestions with a curation status of No continue to appear on the Learning Outcomes tab, but don't become learning outcomes and don't show in the details definition. They also don't transfer to talent profiles after successful completion of the course or specialization.
- Any skill suggestion that you delete from the Learning Outcomes tab or the spreadsheet is removed everywhere. The filter list you use to generate the skill suggestions can include the skill suggestion in future suggestions for that course or specialization. It can also include the suggestion in the course or specialization details definition.

# 4 Assessments, Evaluations, Enrollment Questionnaires, and Observation Checklists



# 5 Overrides for Learning Access and Enrollment Defaults

## Optional Access and Enrollment Overrides for an Oracle Course, Offering, or Specialization

Optionally override defaulted completion access and enrollment settings for a course, offering, or specialization. Also optionally override defaulted pricing and payment settings for a course or offering.

- Override completion access and enrollment settings using the Manage Default Access button on the course, offering, or specialization page.
- Override defaulted pricing and payment settings for a course when you configure the default offering attributes. For an offering, override them when configuring the general information.

Offerings inherit the access details from their parent course, and from the default offering attributes in the course configuration. Any changes to the course defaults apply to only the child offerings created after the changes. Typically, controlling access at the course level is enough. We recommend that you control access at the offering level only when you need to show the offering to only specific learners.

**Tip:** When you create voluntary or required learning assignments for a course, offering, or specialization, access defaults don't apply. These assigned learners have full access to the learning details and can immediately get started learning.

### Related Topics

- [Optional Enrollment and Access Overrides for Static and Dynamic Learner Sets in Oracle Learning](#)
- [Default Access and Enrollment for Oracle Learning Catalog Content](#)

## Optional Enrollment and Access Overrides for Static and Dynamic Learner Sets in Oracle Learning

Optionally override defaulted completion access and enrollment settings for a course, offering, or specialization using learner access and access groups. For local access groups, also override pricing and payment settings, set the priority, and set who to run it as.

You add members to static and dynamic learner sets by selecting a specific person or list of person numbers. Or add people using criteria for an analysis report, an organization chart, a learning assignment, or a person.

- If you're on the Access tab, the relevant learners get identified as soon as you save the access details. And that set of learners remains static, never changing.
- If you're on the Access Group tab, the Process User Access process dynamically identifies the learners when it runs at its scheduled intervals. The process adds and removes learners to and from the group according

to whether they still meet the specified criteria. For example, you create an access group for a specific organization. The learners in that group change over time as people join and leave the organization.

#### *Related Topics*

- [Optional Access and Enrollment Overrides for an Oracle Course, Offering, or Specialization](#)
- [Create a Global or Local Access Group for Oracle Learning](#)
- [Default Access and Enrollment for Oracle Learning Catalog Content](#)
- [Process User Access](#)

## How Oracle Learning Access Is Determined

You can add many dynamic and static learner sets to override defaulted access for a course, offering, or specialization. These learner sets can have overlapping members and the Process Access Groups process decides the appropriate access.

The process runs at scheduled intervals and sets learner access in this order:

1. Access group the learner's a member of, according to group priority
2. Access that the learner's a member of
3. Course, offering, or specialization default access

For example, you've a course with two access groups and access added on the Access tab. The Sales access group has priority 1 and the US Employees access group has priority 2.

- For any learners in both access groups, the process applies the Sales access details and advanced rules because that group has the highest priority.
- For any learners in just the US Employees group, it applies those access details and advanced rules.
- For learners identified only on the Access tab, the process applies those access details.
- For all other learners without required or voluntary learning assignments, it applies the course, offering, or specialization default access. Assigned learners have full access to the learning details and can immediately get started learning.

#### *Related Topics*

- [Optional Enrollment and Access Overrides for Static and Dynamic Learner Sets in Oracle Learning](#)
- [Optional Access and Enrollment Overrides for an Oracle Course, Offering, or Specialization](#)



# 6 Access and Enrollment Options for Learning Catalog, Courses, Offerings, and Specializations

## For Courses in a Specialization Options, Default Learning Enrollment in Oracle Learning

Specify whether individuals and managers need to get approval when enrolling for courses in the specialization. Or specify to use the initial learning recorded statuses defined for the specialization or course.

- **Active:** Let individuals enroll themselves and managers enroll their teams without getting approval before people can start learning.
- **Inherit from Course:** Use the initial learning record statuses defined for the course. Ignore the statuses defined for the specialization.
- **Inherit from Specialization:** Use the initial learning record statuses defined for the specialization. Ignore the statuses defined for the course.
- **Requested:** Require that individuals enrolling themselves and managers enrolling their teams get approval before people can start learning.

## Self-Service View Mode Options for Default Learning Access in Oracle Learning

Specify whether learner self-service pages should show a summary of the course, offering, or specialization or details of the course or specialization. Or don't show the course, offering, or specialization at all.

- **Details View:** Show learners all the details for the course, offering, or specialization, including title, syllabus, description, cover art, pricing, expected effort, and prerequisites.
- **No Access:** Prevent learners from finding the course, offering, or specialization when exploring the learning catalog.  
**Tip:** You can grant specific learners access to the course, offering, or specialization, but you can't exclude access for specific learners. So when you want only certain learners to see the course, offering, or specialization, you need to select **No Access** for that learning item. Then configure access or access groups for the learning item to show the details or summary view to those learners, as appropriate.
- **Summary View:** Show learners the title, syllabus, short description, and cover art or branding for the course, offering, or specialization before they enroll. Show them all the information after they're enrolled, including price, expected effort, and prerequisites.

The option that you select on the Configure Catalog Defaults page applies to all courses, offerings, and specializations created in the learning catalog. It also applies to any content you import from external content providers.

## Course Override Options

Optionally use learning community access and visibility instead of the course access when learners access the course from a learning community. And optionally use the specialization access when learners access the course from a specialization.

## Specialization Override Option

Optionally use learning community access and visibility instead of the specialization access when learners access the specialization from a learning community.

### Related Topics

- [Optional Access and Enrollment Overrides for an Oracle Course, Offering, or Specialization](#)
- [Optional Enrollment and Access Overrides for Static and Dynamic Learner Sets in Oracle Learning](#)

# Initial Learning Record Status Options for Default Learning Enrollment in Oracle Learning

Specify whether individuals and managers need to get approval when enrolling in a course, offering, or specialization. If you require approval, further specify whether to automatically activate approved enrollments.

- **Active:** Let individuals enroll themselves and managers enroll their teams without getting approval before people can start learning.
- **None:** Prevent individuals from enrolling themselves and managers from enrolling their teams in the learning.
- **Requested:** Require that individuals enrolling themselves and managers enrolling their teams get approval before people can start learning.

**Activate enrollment requests automatically after approval:** This check box appears after you select **Requested**.

- If you select the check box, registration approval automatically activates the learning assignments. Wait lists and prerequisites can affect whether the learning assignment statuses actually change to Active.

If you clear the check box, after enrollment approval, learning assignments have a Request Approved Status until a learning administrator manually activates them. This can be useful if you do advanced planning and require people to enroll for future learning that's not yet available. You can leave these learning assignments in a Request Approved status until it's time to activate them.

- **Request Approved** (only for manager self-service): Don't start an approval process when learning administrators create assignments. Instead require that learning administrators to manually activate the assignments.

For learners, you can also get more information to help approvers decide whether to accept or reject the enrollment request. To do this, select the **Show Enrollment Form** option.

*Related Topics*

- [Optional Access and Enrollment Overrides for an Oracle Course, Offering, or Specialization](#)
- [Optional Enrollment and Access Overrides for Static and Dynamic Learner Sets in Oracle Learning](#)
- [Default Access and Enrollment for Oracle Learning Catalog Content](#)

## Prerequisites Options for Default Learning Enrollment in Oracle Learning

Specify if learners can enroll in a course, offering, or specialization before achieving required prerequisites on the Configure Catalog Defaults page. Also set how many days they have to achieve the prerequisites before automatically withdrawing their enrollment.

Learner assignment statuses remain in Pending Prerequisite until learners achieve the prerequisite or the Process User Access process automatically withdraws them.

**Note:** Managers can always assign training to their team members, even if some of them don't have the required prerequisites.

*Related Topics*

- [Optional Access and Enrollment Overrides for an Oracle Course, Offering, or Specialization](#)
- [Optional Enrollment and Access Overrides for Static and Dynamic Learner Sets in Oracle Learning](#)
- [Default Access and Enrollment for Oracle Learning Catalog Content](#)



# 7 Example Default Access and Enrollment Configurations

## Company-Wide Access to an Oracle Learning Course and Offering with No Enrollment Approval, Learners Can Enroll in Both

You've a course and associated offering that you want everyone to have access to. You also want their enrollment requests to activate the learning automatically, without any approvals.

Default access configuration for the course:

Field	Value	Reason
View Mode	Details View	Everyone can see the available course offerings
Initial Learning Record Status (learner)	Active	Immediately activate learning when learners enroll.
Initial Learning Record Status (manager)	Active	Immediately activate learning when managers enroll their people.

Offerings inherit the default access configured for the course at the time you create the offering. Since you want the same configuration for the offerings, you don't need to make any overrides in the offering default access.

With this configuration, learners can enroll in the course and then the offering, or directly in the offering. Their experience is better when they enroll directly in the offering. While managers can enroll their people in the course and offering, it's better for them to enroll their people in the course. This way, their people can enroll in the offering that's best for them.

## Oracle Learning Course with Instructor-Led and Self-Paced Offerings, Learners Need Approval for Instructor-Led Enrollments

You have a course with one offering that's instructor-led and another that's self-paced. Self-paced enrollment requests should activate the learning automatically because the offering is free. Instructor-led enrollments should require approval because the offering has a fee for each attendee.

In this example, managers can't enroll their people in either the course or the offerings.

Default access configuration for the course:

Field	Value	Reason
View Mode	Details View	Everyone can see the available course offerings
Initial Learning Record Status (learner)	None	Learners can't enroll in the course.
Initial Learning Record Status (manager)	None	Managers can't enroll their people in the course.

Default access configuration for the instructor-led offering:

Field	Value	Reason
View Mode	Details View	Everyone can see the available course offerings
Initial Learning Record Status (learner)	Requested Also select <b>Activate enrollment requests automatically after approval.</b>	This override lets learners enroll in the offering, but requires approval before they can start. It also immediately activates the learning after enrollment approval.
Initial Learning Record Status (manager)	None	Managers can't enroll their people in the course.

Default access configuration for the self-paced offering:

Field	Value	Reason
View Mode	Details View	Everyone can see the available course offerings
Initial Learning Record Status (learner)	Active	Immediately activate learning when learners enroll.
Initial Learning Record Status (manager)	None	Managers can't enroll their people in the course.

## Generate Demand for an Oracle Learning Course Before Funding the Offerings, Let Learners Enroll, But Require Manual Activation

To avoid funding learning with little interest, let learners enroll in courses and require approval. Enrollment approval should then require a learning administrator to manually activate the learning if there's enough interest and after adding offerings.

Default access configuration for the course:

Field	Value	Reason
View Mode	Details View	Everyone can see the available course offerings
Initial Learning Record Status (learner)	Requested Make sure that <b>Activate enrollment requests automatically after approval</b> is clear.	Learners can enroll in the course, but need approval to continue. After enrollment approval, a learning administrator needs to manually activate the learning.
Initial Learning Record Status (manager)	Requested Make sure that <b>Activate enrollment requests automatically after approval</b> is clear.	Managers can enroll their people in the course, but need approval to continue. After enrollment approval, a learning administrator needs to manually activate the learning.

Here's what you do next for courses with sufficient interest:

1. Approve all enrollment requests.
2. Create one or more offerings.
3. Activate each learner enrollment.

Learners can then enroll in an offering. And managers and learning administrators can enroll learners in the appropriate offerings.

## Company-Wide Access to an Oracle Learning Course and Offering with No Enrollment Approval, Learners Can Enroll Only in the Offering

You've a course and associated offering that you want everyone to have access to. You want their enrollment requests to activate the learning automatically, without any approvals. And for the best experience, learners should enroll directly in the offering.

Default access configuration for the course:

Field	Value	Reason
View Mode	Details View	Everyone can see the available course offerings
Initial Learning Record Status (learner)	None	Learners can't enroll in the course.
Initial Learning Record Status (manager)	Active	Immediately activate learning when managers enroll their people.

Default access configuration for the offering:

Field	Value	Reason
View Mode	Details View	Everyone can see the available course offerings
Initial Learning Record Status (learner)	Active	Immediately activate learning when learners enroll.

Field	Value	Reason
Initial Learning Record Status (manager)	Active	Immediately activate learning when managers enroll their people.

While managers can enroll their people in the course and offering, it's better for them to enroll their people in the course. This way, their people can enroll in the offering that's best for them.

## Oracle Learning Specialization with Some Offering Enrollments Requiring Approval

You have a specialization with five courses. Offering enrollments for three of the courses should activate automatically, as should the enrollments for the cheaper offerings in the other two courses. Enrollments for the more expensive offerings require approval.

Learners can access these courses only from a specialization. And other specializations might include one or more of the courses in this specialization. For this specialization, the 3 courses with automatic activation are in the first section. The other two courses are in the second section.

Default access configuration for the course:

Field	Value	Reason
View Mode	No Access	No one can see the course.
Initial Learning Record Status (learner)	any	Learners can't see the course so setting is meaningless.
Initial Learning Record Status (manager)	any	Managers can't see the course so setting is meaningless.

Default access configuration for the instructor-led offering:

Field	Value	Reason
View Mode	Details View	This override lets everyone can see the offering, but only in the specializations that include it and override the view mode set for the course.
Initial Learning Record Status (learner)	Requested Also select <b>Activate enrollment requests automatically after approval.</b>	Learners can enroll in the offering, but need approval before they can start. It also immediately activates the learning after enrollment approval.
Initial Learning Record Status (manager)	Requested Also select <b>Activate enrollment requests automatically after approval.</b>	Managers can enroll their people in the offering, but need approval before their people can start learning. It also immediately activates the learning after enrollment approval.

Default access configuration for the self-paced offering:



Field	Value	Reason
View Mode	Details View	This override lets everyone can see the offering, but only in the specializations that include it and override the view mode set for the course.
Initial Learning Record Status (learner)	Active	Immediately activate learning when learners enroll.
Initial Learning Record Status (manager)	Active	Immediately activate learning when managers enroll their people.

Default access configuration for the specialization:

Field	Value	Reason
View Mode	Details View	This override lets everyone can see the offering, but only in the specializations that include it and override the view mode set for the course.
Initial Learning Record Status (learner)	Requested Also select <b>Activate enrollment requests automatically after approval.</b>	Learners can enroll in the offering, but need approval before they can start. It also immediately activates the learning after enrollment approval.
Initial Learning Record Status (manager)	Requested Also select <b>Activate enrollment requests automatically after approval.</b>	Managers can enroll their people in the offering, but need approval before their people can start learning. It also immediately activates the learning after enrollment approval.

Assignment settings for the specialization sections:

Section	Initial Assignment Status of Activities	Reason
Contains the three courses with offerings that don't require approval	Active	Immediately activate learning when learners enroll.
Contains the two courses with some offerings that require approval	Inherit from Activity	Honor the initial learning record status set for each offering.



# 8 Analysis Reports to Identify Learners for Access Groups, Assignments, and Initiatives

## Create Analysis Report Criteria to Identify Learners for Access Groups, Assignments, and Initiatives

You can build reports to identify learners to include in or exclude from access groups, assignments, and initiatives. These reports give you more options for identifying learners than other criteria, such as learning assignment, organization chart, and person.

### Before you start

Have your application administrator confirm that the WLF\_RBA\_BI\_FOLDER profile has a folder specified for saved analyses, such as `/shared/Custom/Human Capital Management/Learning Analyses`.

### Here's what to do

1. In Oracle Fusion applications, go to **Tools > Reports and Analytics**.
2. On the Reports and Analytics page, click **Browse Catalog**.
3. On the Catalog page, on the **New** icon menu, select **Analysis**.
4. On the Select Subject Area dialog box, search for and select **Workforce Management - Worker Assignment Real-Time**.
5. On the Untitled page, build and save your analysis.

For example:

- a. Expand the **Worker** folder.
- b. Drag these attributes and drop them in the Selected Columns section:
  - PersonID (you must include this attribute in all your analyses for the analysis to work properly)
  - Person Number
  - First Name
  - Last Name
- c. Expand the Department folder.
- d. Drag the **Department Name** attribute and drop it in the Selected Columns section.
- e. Click the icon next to Department Name and select **Filter**.
- f. On the New Filter dialog box, in the Value field, search for and select the department you want to filter for, such as Sales.
- g. Click **OK**.
- h. Click the Results tab.
- i. Click the **Save as** icon and save the analysis to the folder specified in the WLF\_RBA\_BI\_FOLDER profile.

*Related Topics*

- [Create a Global or Local Access Group for Oracle Learning](#)
- [Assign Learners to a Catalog Learning Item](#)
- [Automatically Add Learners to and Withdraw Them from a Course, Offering, or Specialization](#)

# 9 Content Resources and Learning Completion Attempts

## Content Resources for the Oracle Learning Catalog

You create activities for learning course offerings using online content resources, such as SCORM and AICC. Also use video, web links, PDF files, assessments, observation checklists, and content from external providers, such as Skillsoft and LinkedIn. Even include cover art.

After adding online content, assessments, and observation checklists to your catalog resources, you can specify how many attempts learners have to pass scored content. For example, give them unlimited or single attempts, or set a specific number.

You can add, edit, replace, and manually process content resources using the Content task on the **My Client Groups > Learning** page. You can also check the statuses of imported content. To find newly uploaded content, try changing the search status to **All**. It can take some time to process the content and change its status to **Active**.

## How Recorded Attempts Affect Oracle Learning Statuses and Scores

You can specify whether learners have a set or unlimited number of attempts to successfully complete the SCORM, HACP, AICC, or Assessment content. The Recorded Attempts setting decides whether In Progress learning moves to Not passed, and when.

Successful attempts are shared wherever the content is used. When the learner completes the content in one offering activity, they don't need to complete the content again if they enroll in other offerings that use it.

Any unsuccessful attempts aren't shared wherever the content is used. Each unsuccessful attempt is counted for only the offering that the learner is currently working in.

You select a Recorded Attempts option on the details page of the online or assessment content that's scored. The field isn't available for unscored content.

- If learners reach the specified number of attempts without successfully reaching the passing criteria, their offering activity is set to a Not Passed status. It does the same for the corresponding learning assignment.
- If learners reach the passing criteria by the specified number of attempts, processing updates their offering activity to a Completed status.

If they've unlimited attempts, the default option, processing tracks how many attempts it takes learners to pass. They can see the number of past tries in their enrollment details. You can see it on the Manage Activities page.

**CAUTION:** If you reduce the number of recorded attempts, you affect learners who haven't completed the quiz but have exceeded the new number of attempts. Learning updates their offering activity and corresponding learning assignment to **Not Passed**.

## How You Reset Ongoing and Completed Attempts for Oracle Learning SCORM Content Resources

To reset all learner ongoing only or ongoing and completed attempts for SCORM learning content, use the More Actions menu on the content details page. Use the Content task on the **My Client Groups > Learning** page to open content details pages.

- **Reset Ongoing Attempts Only** resets only ongoing learner attempts for activities linked to the SCORM content. Learners who don't have a Completed status must start over when they return to that activity.
- **Reset Ongoing and Completed Attempts** resets ongoing learner attempts for activities linked to the SCORM content. It expires all completed learner attempts and any new offering assignments won't automatically complete. Learners must start over for the linked activities.

When you select either option, a background process starts running. You can see the reset progress in the window that appears.

## Statuses for Content Imported into Oracle Learning from External Providers

These statuses apply to content imported from external providers. You see these statuses on the Content and Import External Content pages. Open these pages using the Content task on the **My Client Groups > Learning** page.

- **Current:** Indicates that an imported course is in sync with the external content provider's version.
- **Deactivated:** The content is in the Oracle Learning catalog, but not visible to learners. Learning administrators can see it on only the Import Content page.
- **Modified:** Indicates that the external content provider changed their version of an imported course and Learning hasn't imported those changes yet.
- **New:** Indicates that the course is new in the external provider's catalog and Learning hasn't imported it yet.
- **Removed:** Indicates that the external provider removed the course from catalog. You need to end date the corresponding Learning courses, offerings, and activities.

## Replace Oracle Learning Content Resources or Add Newer Versions and Delete Older Versions

When PDF, video, web link, SCORM, HACP, or AICC learning content resources change, you can replace the existing content. Or you can add the newer content and delete the older content.

## Replace

Replacing content can be useful when storage could be an issue and when learners won't reference the content again after they complete the learning. You can also replace content to make small changes, such as corrections to misspellings, images, or narrative text.

Use this option only when you don't need to report on which content version learners completed. Don't use replace when meta data changes were made in the package. Also, if major parts of a content resource changed, we recommended that you add it as a newer version. Don't replace the existing content. Replacing content items after making significant changes that affect the length or file size could result in assignment errors or other issues.

A replacement affects all associated offering activities, including completed activities. All learners with Not started, In progress, and Completed assignments always see the most recent version of the content item. When learners access their completed content after the replacement, it isn't necessarily the content item that they completed.

Here's what happens when you replace content:

Content Type	What Happens
PDF and Web Link	All learners see the new content as specified in the content item and their progress isn't reset.
Video	All learners see the new content and their progress isn't reset.  If you select <b>Retranscode Video</b> , the new video is transcoded immediately. Otherwise, the video is transcoded based on the Video Transcoding settings on the Configure Background Processing page. Learners see the old video until the new video is transcoded.
SCORM and HACP	All learners see the new content and their progress isn't reset unless you specify otherwise. <ul style="list-style-type: none"> <li>Reset Ongoing Attempts Only: Resets the ongoing attempts for only learners with active assignments.</li> <li>Reset Ongoing and Completed Attempts: Resets the ongoing attempts for learners with active and completed assignments.</li> </ul>

Why would you want to reset a completed attempt? When learners are in the middle of completing an activity, they've an ongoing attempt on the content item associated with the activity. After they complete the content item, the ongoing attempt converts to a completed attempt. When learners get a completed attempt on a content item, the associated activity is marked Completed. If learners are assigned other offerings with an associated activity that has the same content item, these activities are also automatically marked Completed. Resetting completed attempts means that other activities associated with the same content item, in other offerings won't be marked Completed. And learners still need to complete those other activities in the other offerings.

## Add or Delete

If major parts of a content resource, changed, add the newer version. Also add a newer version to preserve the original content so that learners can reference it after they complete the learning. Then add that newer content to a new offering activity. New learning assignments pick up the newer content, and learners can still reference the older content in their completed learning. This option also lets you report on which content version learners completed.

**Tip:** Be sure to end date the courses that contain the older content. Learners can still see it after they complete the learning, but people searching for learning find only the most recent version.

Here are some key considerations for adding and deleting content:

- You can't change the content item associated with an existing activity. You need to delete the activity, then add a new activity associated with the new content item.
- Learners with assignments that have a Learning Item As-of Date of Assignment to Learner Date see the activities that were in the offering as of the assignment start date. They won't see activities added to the offering after the assignment start date. And they continue to see activities removed from the offering after the assignment start date. The learners won't ever see any changes to the offering, even if activity changes are reconciled because these assignments don't participate in the reconciliation.

Learning assignments with a Learning Item As-of Date a Assignment to Learner Date register only the date, not the time. So avoid creating offerings and activities, assigning learners, then adding or deleting activities all on the same date. This use case isn't supported and could have unexpected behaviors.

- Learners with completed assignments that have a Learning Item As-of Date of Latest see the activities that were in the offering when they completed the offering. Learners with these assignments that aren't yet completed see the most recent set of activities after the content changes are reconciled. Until reconciliation, they won't see the most recent set of activities.

#### Related Topics

- [Video Transcoding Concurrency and Strategy Defaults](#)

## Replace an Oracle Learning Content Resource

To make small changes, such as corrections to misspellings, images, or narrative text, you can replace PDF, video, SCORM, HACP, and AICC content. You can't replace web link or assessment content.

1. On the **My Client Groups > Learning** page, click **Content**.
2. Search for and click the name of the content you want to update.
3. On the content details page, copy the Title value.
4. On the Actions menu, select **Replace**.
5. If you selected SCORM, HACP, or AICC content, a warning that the internal structure of the replacement and existing content must match appears. If the structures match, continue. If they don't, add the content as a new version instead of replacing the existing content.
6. On the Import Replacement Content dialog box, add the replacement file.
7. In the Title field, paste the title you copied in step 3.
8. Click **Save and Close**.

Replaced videos have a **New** status. You won't be able to view or preview the video until the Video Transcoding and Processing process completes. If you replace a video with one that doesn't have the same duration, the playback may not resume at the expected location.

#### Related Topics

- [Replace Oracle Learning Content Resources or Add Newer Versions and Delete Older Versions](#)
- [Background Processing in Oracle Learning](#)



# 10 Add and Manually Process Content Resources

## Add Online Content to Your Oracle Learning Resources

To use SCORM, HACP, or AICC content in learning activities, you upload the content as learning catalog resources. Then you configure basic, advanced, and related materials properties. The maximum supported file size is 1GB.

### Before you start

- Review the *Oracle Learning eLearning playback guidelines* to see known constraints and best practices for content authors and learning administrators.
- Make sure that the SCORM or AICC content is in the XML format and packaged in a single .zip file format.
- Make sure that the manifest file is at the root level and not in another folder.
- Make sure that the structure name doesn't include any spaces.

SCORM content needs to comply with the SCORM 1.2 or SCORM 2004 (Edition 2 and Edition 3) standards. AICC content needs to comply with the AICC Level 1 Version 2.2 or 4.0 standards.

### Here's what to do

1. Upload the online content.
  - a. On the **My Client Groups > Learning** page, click **Content**.
  - b. On the Content page, Add menu, select **Add Online Content**.
  - c. In the Add Online Content page, complete the required information add the .zip file.
  - d. Click **Submit**.

You can't download content resources from Oracle Learning. We recommend that you keep copies of your source files elsewhere so that you can make changes as the need arises.

2. Configure the basic, advanced, and related materials properties of the online content you just added.
  - a. On the Content page, search or filter for the newly added online content. To see newly added content that might not have finished processing, and thus isn't active yet, select the **Currently Being Processed** status filter.
  - b. Click the content title.
  - c. On the content details page, expand and review the sections and make edits, as appropriate.
    - By default, the import used the file name as the content title. You can override the title, as appropriate.
    - Content with an **Inactive** status or future start date isn't available for selection when you create learning activities.
    - Make sure that the recorded attempts and mastery score properties are appropriate for the intended learners. The online content needs to get scored for you to see the mastery score properties.
      - o If you don't let learning administrators view learner scores, they see only that the learner passed or failed the assessment. It works the same if you don't let learners view their scores.
      - o To keep learners from sharing their correct answers with other learners, you might not want to let them from review their recorded attempt.
  - d. Specify how to handle completion when learners close content before they reach the end.
    - When you use the lesson status, if the content sends a lesson status of pass or fail, Oracle Learning doesn't assess the score. Instead Learning uses the instruction sent by the content. If the content sends a completed lesson status, Learning decides if the learner passed or failed by comparing the actual score to the mastery score. In both cases, the content sends a lesson status.
    - When you use the learner's score, Oracle Learning doesn't rely on the content sending a lesson status. Instead it assumes that when the player closes, the lesson status is Completed. And it decides if the learner passed or failed by comparing their actual score to the mastery score.
  - e. Optionally see the content from a learner perspective. On the Actions menu, select **Preview**.

Background processing of the uploaded content can take some time. There might be a delay between when you add online content and learners can launch it. After the processing finishes, any description text in the manifest file gets added to the content resource description.

#### Related Topics

- [How Recorded Attempts Affect Oracle Learning Statuses and Scores](#)
- [eLearning Setup Profile Options for Oracle Learning](#)

## Add a Video to Your Oracle Learning Content Resources

To use video content in learning activities, you upload the video as a learning catalog resource. The maximum supported file size is 1GB.

### Before you start

Make sure that the video uses H.264 compression standard and the AAC (Advanced Audio Coding) format.

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Content**.

2. On the Content page, Add menu, select **Add Video**.
3. On the Add Video page, complete the required and relevant optional information, and add the video file.
4. Click **Submit**.

You can't download content resources from Learning. So that you can make changes as the need arises, we recommend that you keep copies of your source files elsewhere.

You can check the status and refresh status of existing video content on the Content page using search and provided filters. To see newly upload content that hasn't finished processing yet, and thus isn't active, select the **Currently Being Processed** status filter.

## Add a Web Link to Your Oracle Learning Content Resources

To use web links in learning activities, you need to add them as learning content resources. Unlike online and video content resources, web links don't track learner completion. But you can mark this content complete when learners open the link.

1. On the **My Client Groups > Learning** page, click **Content**.
2. On the Content page, Add menu, select **Add Web Link**.
3. In the Add Web Link page, complete the required appropriate optional information.
  - o Content with an Inactive status, future start date, or past end date isn't available for selection when you create learning activities.
  - o To give completion credit to learners who click the link, select **Mark as complete when learner opens the web link**. Unlike SCORM, HACP, and AICC content, web link content doesn't communicate completion statuses, so this is the only way to give credit.
4. Click **Submit**.

## Add a PDF File to Your Oracle Learning Content Resources

To use PDF file content in learning activities, you add the file as a learning catalog resource. The maximum supported file size is 1GB.

1. On the **My Client Groups > Learning** page, click **Content**.
2. On the Content page, Add menu, select **Add PDF File**.
3. In the Add PDF page, complete the required and relevant optional information, and add the PDF file.

#### 4. Click **Submit**.

You can't download content resources from Learning. So that you can make changes as the need arises, we recommend that you keep copies of your source files elsewhere.

You can check the status and refresh status of existing PDF file content on the Content page using search and provided filters. To see newly upload content that hasn't finished processing yet, and thus isn't active, select the **Currently Being Processed** status filter.

**Note:** PDF file content doesn't communicate completion statuses back to Learning. As soon as learners start a PDF activity, Learning considers the activity complete.

## Add an Assessment to Your Oracle Learning Content Resources

Before you can add assessments to learning course offerings, you need to add them to your content resources. For anyone to see the assessment, the questionnaire template used to create it must have the Score Questionnaire option selected.

### Before you start

*Create Questionnaires for Oracle Learning.*

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Content**.
  2. On the Content page, Add menu, select **Add Assessment**.
  3. On the Add Assessment page, complete the required and relevant optional information.  
The start and optional end dates identify the period when people can add the assessment to self-paced course activities.
  4. In the Content section, search for and select the assessment you want to use. The list contains only Learner Assessment type questionnaires.
  5. In the Advanced section, Mastery Score field, enter the minimum score required to pass the assessment. Learners who score below the mastery score for the offering activity get an incomplete for the activity. That **Incomplete** status rolls up to the offering and the course.
  6. Optionally complete the remaining fields.
    - If you enable a time limit, learners see a countdown clock in the assessment. After they start a timed assessment, learners can't save and close the assessment until they submit it, or time runs out. When the time runs out, Learning submits and scores the assessment. It then compares the score to the mastery score, to decide if the learner passed or failed the assessment.
- Tip:** When you enter the time limit, you automatically set the expected effort too.
- If the selected assessment has points for each question and you want to use them to calculate a passing score, select **Enable Scoring**.
  - If you don't let learning administrators view learner scores, they see only that the learner passed or failed the assessment. It works the same if you don't let learners view their scores.
  - To keep learners from sharing their correct answers with other learners, you might not want to let them from review their recorded attempt.

7. Click **Submit**.
8. To see how the assessment appears to learners, on the Contents page, use the search and provided filters to find the assessment.
9. Select the assessment and on the Actions menu, select **Preview**.

#### Related Topics

- [Assessment Definition for Oracle Learning](#)

## Add an Observation Checklist to Your Oracle Learning Content Resources

Before you can add observation checklists as self-paced activities to blended and self-paced course offerings, you need to add them to your content resources.

### Before you start

1. Give learning administrators access the list of questionnaires they can use as observation checklists. To do this, grant the Use REST Service - Questionnaire Lists of Values privilege to the appropriate job roles.
2. [Create Questionnaires for Oracle Learning](#).

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Content**.
2. On the Content page, Add menu, select **Add Observation Checklist**.
3. On the Add Observation Checklist page, complete the general information.  
To let people add it as a self-paced activity to self-paced and blended course offerings, the status needs to be Active.
4. In the Contents section, search for and select the questionnaire to use as the observation. The list contains only Learner Observation Checklist type questionnaires.
5. In the Observation Checklist section, specify the type of observer, such as Individuals, Management Hierarchy, or Representative. Supporting fields appear based on your selection.
  - You can specify up to 20 individuals. Any 1 of these people can claim the task and become the observer.
  - The manager observer is dynamically decided based on the selected manager type and the learner.
  - The representative is dynamically decided based on the selected representative type and the learner. When a pool of representatives is identified, one of the representatives claims and completes the observation checklist. The can also release a claimed checklist back for another representative to complete.

6. In the Advanced section, configure various attempts settings, if learners need to self-assess, and if observers can reassign their checklists.

What happens if the observer fails the learner:

- o If you configure the observation with a single attempt, the learner fails the activity and the learning assignment.
- o If you configure the observation with multiple attempts, the learner can be observed again.
  - If Observer Type is Management Hierarchy, the same line manager will observe the learner again.
  - If Observer Type is Representative, the observation task returns to the representative pool and the original observer or another representative will observe the learner.

If you let observers reassign the observation activity to anyone, they can reassign it to other people specified by the observer type. Or they can assign it to people outside of the observer type.

7. Click **Submit**.

#### Related Topics

- [How You Assign Areas of Responsibility](#)

## Add Cover Art to Your Oracle Learning Content Resources

To add cover art to learning content items, you need to add it as learning catalog resources. The maximum supported file size is 1GB.

### Before you start

Make sure that the images have file formats, resolutions, and color models that optimize how they appear across learner devices.

- If your image is a photograph or illustration with a high range of color gradients, we recommend that you use the JPEG format. If the image is a clip art or logo, use the PNG or GIF format.
- To show the most important content at its largest width on the catalog page, add an image that measures 1849 x 1849 pixels. This gives you an aspect ratio of 1:1. Or add an image with content that that people can easily recognize at that size and aspect ratio. Learning automatically scales down and crops your image to produce thumbnails where appropriate, such as on learning item details pages.
- To produce an image with a best file size for loading on learning pages, use an image resolution of 72 dots per inch (DPI). It's the same resolution that computer monitors use. Higher resolutions have larger files, which take longer to load on learning pages.
- To use the best color model for computer monitors, make sure that the image uses the RGB color model.

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Content**.
2. On the Content page, Add menu, select **Add Cover Art**.
3. In the Add Cover Art page, complete the required and relevant optional information, and add the image file.
4. Click **Submit**.

# Create a Global or Local Access Group for Oracle Learning

You can create dynamic groups of learners with specific access details and advanced rules, and reuse the group across courses, offerings, and specializations. You can also create access groups that are local to a specific course, offering, or specialization.

Access the Global Access Groups, Course, Offering, and Specialization tasks on the **My Client Groups > Learning** page.

1. On the Global Access Groups page, click **Create**.  
Or for the existing course, offering, or specialization, on the **Learners > Access Groups** tab, select **Add Access Group > Create Local Access Group**.
2. Complete the required general information. This includes adding members.

Add Members Option	How You Identify Learners
Person	Provide search criteria, such as name, person number, department, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Save....</b> In the Name field, replace <b>Search by Name copy</b> with a meaningful name.
Person Number List	Provide a list of person numbers. To upload a file, in the Type field select <b>Type</b> . To use a URL, in the Type field select <b>Text</b> .
Analysis Report Criteria	Specify an existing Oracle Transactional Business Intelligence (BI) analysis report that has the criteria to identify the appropriate learners.
Learning Assignment Criteria	Provide applicable values for learning assignment attributes, such as the learning name, type, assignment status, or a combination. Also specify whether learners need to match all the criteria or any of it.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.
Organization Chart Criteria	Search for and select the appropriate chart, such as Chris's Directs or Chris's Org.
Person Criteria	Provide search criteria, such as business unit, legal employer, job family, location, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.

To exclude specific individuals when you add learners using learning assignment or person criteria:

- a. On the criteria dialog box, click **Advanced**.
- b. On the Add Fields menu button, select the field you want to use to exclude people, for example, **Person Number**.
- c. Change the condition for the field you added to **Does not equal**.

- d. Enter the appropriate value.
- e. Report steps b through d for each individual you want to exclude.

To exclude people when you use analysis report criteria, make sure that the report logic includes the exclusion criteria. When you select learners using analysis report and organization chart criteria, you can only search for and select the analysis or chart.

3. Review the defaulted access details and make any appropriate changes. Use these topics to help you make the correct choices:
  - o Initial Learning Record Status Options for Learning Enrollments
  - o Prerequisites Options for Learning Enrollments
4. Review the advanced rules. Global and local access groups have the Run As setting. Local access groups also let you set the priority and override pricing and payment defaults.
5. Save the access group.

#### Related Topics

- [Optional Enrollment and Access Overrides for Static and Dynamic Learner Sets in Oracle Learning](#)
- [How Oracle Learning Access Is Determined](#)
- [Optional Access and Enrollment Overrides for an Oracle Course, Offering, or Specialization](#)

## Import External Content to the Oracle Learning Catalog

You can import all the catalog content for a configured external provider, or import a subset. For example, import only the content in a certain language. Use the Import External Content task on the **My Client Groups > Learning** page.

To complete these steps, you need the Manage External eLearning Content security privilege. To avoid corruption issues, make sure that the Load and Synchronize External Course Data process isn't running or scheduled to run during your import.

### Before you start

*Configure External Content Providers for Oracle Learning*

### Here's what to do

1. On the Import External Content page, click **Import**.
2. On the Import External Content page, search for and import the content appropriate content.
  - o To add all of a provider's course, regardless of your search criteria, on the **Import Entire Catalog** button menu, select the provider.
  - o To add a subset of content, search for and select it. Then on the toolbar, click **Import**. You can use standard keyboard shortcuts, such as CTRL+A to select all the search results. You can also use SHIFT or CTRL to select consecutive and nonconsecutive content.

**CAUTION:** If you manually added a branding image to a course managed by the external provider, the import overwrites that image.

**Note:** We don't import brand images from BizLibrary because it sends the image URLs encoded in Base64 format, which we don't support.



3. On the message that appears, click **Yes**. The import learning content process runs in the background to create the corresponding learning catalog resources and content.
4. To monitor the courses the process is importing, in the Status field, select **Import Requested**. All selected courses have this status until the import learning content process completes.

**Tip:** You can also check the status and refresh status of imported external content on the Content page using basic and advanced search criteria. To see newly upload content that hasn't finished processing yet, and thus isn't active, in the Status field, select **All**.

#### Related Topics

- [How External Course Properties Map to Oracle Learning Course Properties](#)
- [How Oracle Learning Imports External Content Offered in Multiple Languages](#)
- [Load and Synchronize External Course Data](#)
- [Stop Importing External Content to the Oracle Learning Catalog](#)

## Manually Process Oracle Learning Content Resources That Failed Processing

You can manually reprocess content resources that failed processing due to various issues, such as a timeout, an interrupted connection, or an unknown content type.

1. On the **My Client Groups > Learning** page, click **Content**.
2. Make sure that the status condition is **Equals**.
3. In the Status field, select **Processing Failed**.
4. Select the appropriate content.
5. Click **Process**.

## Enable Environment Refreshes with Oracle Learning Content Resources

You can designate SCORM, HACP, PDF, and Video content resources as eligible for republishing to set up test environments. You can then include the designated content in production to test and test to test environment copies.

1. On the **My Client Groups Learning** page, click Content.
2. On the Content page, search for and select the appropriate content.
3. On the Environment Refresh menu, select Enable for Refresh.

Results: In the Refresh Status column, content statuses change to Enabled – Source not Ready. And the Ingest Rich Media from Remote Content Repository to Database background process is automatically scheduled to check for and process all this content. Depending on the quantity of content you selected, and the file sizes, it can take time for the process to complete. Leave enough time for it to complete when scheduling the environment refresh.

For content processed successfully, the statuses change to Enabled – Source Ready. For content with processing issues, the statuses change to Disabled. The process log contains the specific errors.

# 11 Instructor-Led Training Resources

## Instructor-Led Training Resources for the Oracle Learning Catalog

You create activities for learning course offerings using instructor, classroom, and training supplier training resources. After linking them to activities, you can see classroom schedules and the offerings an instructor taught.

### Related Topics

- [Course Offerings Definition for Oracle Learning](#)
- [Learning Activities Definition for Oracle Learning](#)

## Create an Instructor for Your Oracle Learning Catalog Resources

To link an instructor to instructor-led training (ILT) or virtual instructor-led training (VILT) activities, you need to add them as a learning catalog resource.

1. On the **My Client Groups > Learning** page, click **Instructors**.
2. On the Instructors page, click **Create**.
3. On the Person Search dialog box, search for and select the appropriate person.
4. Click **Select**.
5. On the Create Instructor page, if the person is affiliated with a training supplier, search for and select it.
6. Optionally add related materials.
7. Click **Save and Close**.

### What to do next

As appropriate, [Link an Instructor to a Virtual Classroom Provider](#).

### Related Topics

- [Course Offerings Definition for Oracle Learning](#)
- [Learning Activities Definition for Oracle Learning](#)

## Link an Instructor to a Virtual Classroom Provider

Let instructors add virtual classroom training as calendar events, join the active trainings, and view the recorded trainings from the offering details page. Also let them view the attendance report in Edit mode on the activity details page.

### Before you start

*Configure the Virtual Classroom Provider for Oracle Learning*

### Here's what to do

1. On the **My Client Groups > Learning** page under catalog resources, click **Instructors**.
2. On the Instructors page, search for and click the instructor.
3. On the Edit Instructor page, in the Virtual Accounts section, on the Create menu, select the appropriate virtual classroom provider.
4. On the Create Instructor Provider Account page, complete the account details.  
For Microsoft Teams, the user name that you enter must exist in MS Active Directory for the tenant ID specified in the virtual classroom configuration.
5. To validate the details, click **Validate**.  
For Microsoft Teams, the Product Templates section appears. Learning doesn't use templates, so select **Default**.
6. After validation decides that the details are valid, click **Save and Close**.
7. On the Edit Instructor page, click **Save and Close**.  
The specific features available to instructors depends on the virtual classroom provider.

## Create a Classroom for Your Oracle Learning Catalog Resources

To use a classroom in instructor-led training (ILT) or virtual instructor-led training (VILT) activities, you need to add it as a learning catalog resource.

### Before you start

Create the locations used for learning classroom resources using the Manage Locations task on the **My Client Groups > Workforce Structures** page.

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Classrooms**.
2. On the Classrooms page, click **Create**.

3. On the Create Resource page, complete the required and relevant optional fields.
  - o You can use the description to identify the physical location of the classroom, for example, **3rd-floor conference room on the west side**.
  - o The capacity lets you decide the best classroom to use when creating an offering activity.
  - o If a training supplier provides the classroom, identifying them helps you to find the appropriate classroom when creating an offering.
4. Click **Save and Close**.

#### Related Topics

- [Course Offerings Definition for Oracle Learning](#)
- [Learning Activities Definition for Oracle Learning](#)
- [Locations Used for Oracle Learning Classroom Resources](#)

## View the Schedule for an Oracle Learning Classroom

After you link a classroom to learning activities, you can see the schedule on the responsive Edit Resource page, under the classroom details. The Redwood page doesn't currently show this information.

1. On the **My Client Groups > Learning** page, click **Classrooms**.
2. On the Classrooms page, search for and click the classroom name.

## View the Oracle Learning Offerings Taught by an Instructor

After you link an instructor to offering activities, you can see the taught offerings on the responsive Edit Resource page, under the instructor details. The Redwood page doesn't currently show this information.

1. On the **My Client Groups > Learning** page, click **Classrooms**.
2. On the Classrooms page, search for and click the classroom name.

## Create a Training Supplier for Your Oracle Learning Catalog Resources

To link a training supplier to instructors and classrooms, you need to add it as a learning catalog resource. This linking helps narrow search results when creating offering activities and on self-service pages.

1. On the **My Client Groups > Learning** page, click **Training Suppliers**.
2. On the Training Suppliers page, click **Create**.

3. On the Create Training Supplier page, complete the required and relevant optional fields.
4. Click **Save and Close**.

*Related Topics*

- [Course Offerings Definition for Oracle Learning](#)
- [Learning Activities Definition for Oracle Learning](#)

# 12 Completion Certificates

## Completion Certificates for Oracle Learning Courses, Specializations, and Legacy Items

Learners and managers can download a completion certificate for course, specialization, and legacy item learning assignments with **Completed** or **Bypass Completed** status. Be sure to set Certificate completion defaults. Otherwise, no one sees the print action, even with full privileges.

If you've the appropriate permissions, you can configure the available certificate templates. Whenever a learner accesses their completion certificate, they always see the most recent certificate template.

### Related Topics

- [Set Completion Certificate Defaults for Oracle Learning Courses and Specializations](#)

## Configure Completion Certificate Templates for Oracle Learning

To edit a certificate template for Learning, you access Oracle BI Publisher Enterprise through your organization's /xmlpserver URL (for example, https://hostname.com/xmlpserver). The /xmlpserver has standard Course and Specialization folders in the **Shared Folders/Human Capital Management/Learning/Certificates** folder.

1. In the appropriate folder, right-click the completion certificate report and select **Customize**. This action creates a similar, custom folder structure: **Shared Folders/Custom/Human Capital Management/Learning/Certificates**.
2. In the appropriate Custom folder, create a backup copy of the certificate you're going to edit.
  - a. Right-click the completion certificate report and select **Copy**.
  - b. Optionally, rename the copy per your naming conventions.
3. Download the custom completion certificate.
  - a. Right-click the source custom certificate again and select **Download**. The download creates a .zip file that includes the .rtf template and data models.
  - b. On your computer, extract the .zip file contents.
4. Edit the static and dynamic elements of the .rtf completion certificate report.
  - a. Edit the relevant static elements, for example, add your company logo to the header.
  - b. To enable the relevant Publisher options for dynamic elements, such as **Field**, link the XML data file to the .rtf file.
    - i. In the .rtf file, on the Publisher tab, click **Sample XML**.
    - ii. In the Please select XML data dialog box, search for and select the extracted completion certificate DM.xml file.
    - iii. Click **Open**.
  - c. On the certificate template, add and remove dynamic elements as appropriate.

- d. Save your changes.
5. In Oracle BI Publisher Enterprise, replace the existing source .rtf file with your edited .rtf file.
- a. Click the appropriate **Shared Folders/Custom/Human Capital Management/Learning/Certificates** folder.
  - b. In the source custom completion certificate report row, click **Edit**.
  - c. On the edit layout page, click **View a list**.
  - d. Select the source template row.
  - e. Click the **Delete** icon. Remember, you still have your backup version.
  - f. To upload your edited .rtf file, click the **Create** icon.
  - g. On the create layout page, click **Upload RTF, PDF, Excel, Flash, XSL Stylesheet, or eText template file**.
  - h. In the Upload Template File dialog box, search for and select your edited .rtf template file.
  - i. In the Type field, select **RTF Template**.
  - j. In the Locale field, select the language that the certificate is in.
  - k. Click Upload.
  - l. On the edit layout page, click **View a list**.
  - m. In the Default Format field, select **PDF**.

#### **What to do next**

*Set Completion Certificate Defaults for Oracle Learning Courses and Specializations.*



# 13 Capacity Rules and Waitlists

## Waitlists for Oracle Learning Course Offerings

Waitlists let learners and managers indicate their interest in offerings already at maximum capacity or not yet funded. You can then increase capacity (seats or licenses), add more offerings, or fund relevant learning, create the offerings, and activating the learning.

## How Capacity Rules and Waitlist Work for Oracle Learning Course Offerings

Specify minimum and maximum capacities for instructor-led, self-paced, or blended course offerings by enabling capacity rules. This also enables a waitlist where the first learner on the list is also first off. Optionally let learners who self-register join the waitlist.

When offering enrollments reach the specified maximum capacity, any newly registered or assigned learners get added to the waitlist. When seats become available, the assignment gets activated for learners at the top of the waitlist until the offering again reaches maximum capacity.

- If the offering requires enrollment approval, the current capacity gets verified after approval and the learner's assignment gets activated. Or the learner gets added to the waitlist.
- Learners assigned by their managers get their assignments activated until the offering reaches maximum capacity. Any more learners get added to the waitlist.

After the offering end date is past for instructor-led (ILT) and blended learning offerings, the new Change the Status of Offering Assignments with Any Preactive Status to Delete process sets the status to Deleted for all offering assignments with these statuses:

- Waitlisted
- Pending seat acceptance
- Requested
- Pending fulfillment
- Pending prerequisites

When the start date arrives for an ILT offering, existing waitlisted learners will no longer automatically be granted a seat when one becomes available. You control the active learners and can accept more learners into the offering or not.

You can also define capacity for self-paced offerings. But limiting the enrollment of waitlisted learners isn't possible because this type of offering doesn't have start or end dates.

If you decrease the maximum capacity, the offering could become overbooked. To fix this issue, on the **Learners > Learning Assignment** tab, you can manually withdraw learners. Or you can move some learners with active assignments to the waitlist.

**Tip:** You can leave an offering overbooked if you know that you'll eventually withdraw or move learners with active assignments to the waitlist. Overbooking the offering keeps it at maximum capacity and prevents other learners from joining, or the waitlist from automatically filling empty seats.

To prevent learners from enrolling in or requesting to enroll in an offering after it reaches maximum capacity, deselect the Capacity Rules check box. This also lets managers assign the offering to their teams only if there are enough seats for all assignment recipients.

**CAUTION:** Deselecting the Capacity Rules check box for an offering also activates the assignments for any waitlisted learners. Make sure that the offering can handle these extra enrollees. Or you can change their learning assignment status on the offering details page, Learners tab, for example, withdraw them or delete their assignments.

Capacity rules apply only on offerings. You can define default offering capacities while creating a course and override them as appropriate while creating course offerings. Use the Courses and Offerings tasks on the **My Client Groups > Learning** page.

#### Related Topics

- [Change the Status of Offering Assignments with Any Preactive Status to Delete](#)

## What Happens When a Learner Accepts or Declines a Waitlisted Seat

A learner enrolled in a primary course offering, can now join the ILT offering that they were waitlisted for before, when a seat becomes available.

- If they accept the seat, the offering becomes the active enrollment and the learner gets withdrawn from the current primary offering.
- If they decline the seat, the offering is removed from the learner's enrollment and the primary offering they're already enrolled in applies.

## How You Can Override Offering Capacity Rules When Assigning Oracle Learning

You can override capacity settings while creating learning assignments for an offering. On the Advanced Rule stop, select the **Increase maximum capacity and bypass waitlist** check box.

This selection increases the maximum capacity of the offering to fit all the learners selected for the assignment. It also bypasses any waitlisted learners so that they remain on the waitlist.

If you don't select this option, offering assignments get activated for the selected learners until the offering reaches maximum capacity. Then, the remaining selected learners get added to the waitlist.

## How You Can Manually Manage the Waitlist for Oracle Learning Assignments

You can manually manage the learners on a course offering waitlist. Use either the **Learners > Learning Assignments** tab on the offering details page or the Learning Assignments task.

- Moving a learner with an active assignment to the waitlist releases their seat and activates the assignment for the first waitlisted learner.
- Activating the assignment of a waitlisted learner prompts you to also increase the maximum capacity. To prevent other learners from joining the offering, you can say no and overbook the offering.



# 14 Course Administration

## Create a Course for the Oracle Learning Catalog

Here's the basic process to create a course. To preserve courses for reporting, you can end date but not delete courses after you create them.

1. On the **My Client Groups > Learning** page, click **Courses**.
2. On the Courses page, click **Create**.
3. On the Create Course page, complete the required and relevant optional general information. Learners can see all this general information when they view course details in the learning catalog and for enrolled courses.

When you create courses, it automatically generates read-only course numbers. When you upload courses using HCM Data Loader, you can specify your own numbers.

4. Optionally add prerequisites and learning outcomes, such as skills, competencies, honors and awards, languages, licenses and certifications, and memberships. The prerequisites and outcomes you can add, and the corresponding properties and drop-down lists, come from the Prerequisites and Person profile types.

To see more properties, such as renewal and expiration date options, expand each prerequisite and outcome that you add. For example, to make a certification dependent on learning assignment dates, you expand the certification outcome. Then you can set the same expiration date for the certification as the learning assignment. And you can set a certification issue date that matches the learning assignment's validity start date.

**Tip:** You can set learning outcome issue dates to a fixed date in the Issue Date field in the main row. Or you can tie issue dates to a learning assignment date, such as the completion date. To do this, expand the attributes below the main row and select the appropriate option from the Issue Date drop-down list.

When learners complete refresher courses before learning outcomes with expiration dates expire, such as certificates and licenses, their outcomes don't get updated. Keep this in mind when you set expiration and renewal dates.

5. Optionally configure default offering attributes that all offerings for the course inherit as default settings. The default attributes you can configure include setting the training instructor or supplier, pricing, payment, and capacity rates. When you configure the related offerings, you can override these course-level defaults.
  - The primary instructor names come from the people you add using the Instructors catalog resources task.
  - The training supplier names come from the suppliers you add using the Training Suppliers catalog resource task.
  - The Pricing section lets you set up internal chargebacks for any incurred learning costs, such as for instructor-led training (ILT) offerings. The pricing configuration applies only after you set Payment Type to **Manual Payment** in the Payment section.
    - Line item options come from the ORA\_WLF\_PRICING\_TYPE lookup.
    - If you select **Required**, learning administrators can change only the price, when they configure course offerings.
    - The offering price on learning self-service pages gets calculated using all the line items with **Use to Calculate Catalog Item Price in Self-Service** selected.
6. Optionally link the course to one or more learning communities.

7. Optionally set default learning assignment rules, such as the initial assignment status and the validity period. Learning administrators see these defaults, and can override them, when they create required learning assignments.

#### *Related Topics*

- [Oracle Learning Prerequisites and Outcomes, and Talent Prerequisite and Person Profile Types](#)
- [Prerequisites Definition for Oracle Learning](#)
- [Learning Outcomes Definition for Oracle Learning](#)
- [Validity, Expiration, and Course Renewal Options](#)
- [Learn Pricing Type Lookup for Oracle Learning](#)

## Oracle Learning Course Configuration Options: Featured Learning, Offerings, Learners, Conversations, Community Usage, and Default Access

You can mark courses as Featured Learning on self-service pages, link an existing course to offerings, and assign it to learners. Also manage comment configurations for learning administrator and on self-service learning pages, community usage, and default access.

To get to these configuration options, on the Courses page, click the name of an existing course. To assign a course to learners or offerings, you can also select it and click **Learners** or **Offerings**.

### Featured View on the Self-Service Browse Learning Page

When people click the Featured view on their Browse Learning page, they see an image carousel showing the five most recently featured items that they can access. And five categories group the featured learning by learning type, such as courses and specializations. Each category shows up to 25 of the most recently featured learning that they can access, with the most recently featured learning appearing first.

### Default Access

Here's what you can configure on the Default Access page:

- Include an enrollment questionnaire
- Specify when to override the self-service view mode
- Set the self-service view mode
- Configure learning and manager enrollment settings
- Let managers mark enrollments as complete

# Add an Enrollment Questionnaire to an Oracle Learning Course

To get important information about the enrollees, you can add an enrollment questionnaire to the existing course. For anyone to see the questionnaire, the questionnaire template used to create it must have the Score Questionnaire option selected.

## Before you start

1. *Create Questionnaires for Oracle Learning*
2. *Create a Course for the Oracle Learning Catalog*

## Here's what to do

1. On the **My Client Groups Learning** page, click **Courses**.
2. On the Courses page, click the course name.
3. On the course page, click **Manage Default Access**.
4. On the Default Access page, in the Show Enrollment Questionnaire field, select **Enable enrollment questionnaire creation**, if not already selected.
5. Click **Add**.
6. On the search dialog box, search for and apply the appropriate questionnaire. The list contains only Learner Enrollment type questionnaires.
7. To see how the questionnaire appears to learners, click **Preview**.
8. Click **Save**.

# Why a Learner Sometimes Can't Resume an Oracle Learning Course

Check if the learner has more than one offering with the same ID assigned. If they do, withdraw all but 1 of the offerings. Then, reassign the correct offering to the learner or have them self-enroll again.

Or, try opening each offering to see if one offering lets the learner resume the course. If yes, withdraw the learner from the other offering.

## Troubleshoot Why Learners Can't Enroll in Existing Oracle Learning Courses and Offerings

Typically learners can't enroll in an existing course because of course or learning record statuses. Or the Learning Assignment Post Processing process might not have completed successfully. Learning with a **Requested** status goes through approval before learners can enroll.

1. Make sure that on their course details page, they're clicking **Enroll in Course** on the Actions menu. The **Enroll** button in the course banner only expands the Available Offerings section.
2. Make sure they're enrolled in the course before they try to enroll in a course offering.
3. On these pages, make sure that Initial Learning Record Status has **Active** or **Requested** selected, per your policy.
  - o Configure Catalog Defaults
  - o Default Access for the course
  - o Default Access for the offering
4. When learners self-enroll in courses, the Learning Assignment Post Processing process should run and update the related offering activity status. If the process doesn't complete successfully, for example, due to a connectivity interruption, you might need to run it again.

## Direct Access to Oracle Learning Courses, Offerings, Specializations, and Communities

You can provide direct access to the self-service and administrator details pages of a learning course, offering, specialization, or community. To access these shareable deep links, use the learning catalog tasks on the **My Client Groups > Learning** page.

The deep link for an offering doesn't include active links for the offering activities. Learners need to view the enrollment details for the offering to access the active links.

The access controls configured for the course, offering, specialization, or community decide the learner's access to the self-service details. They also decide a learning administrator's access to the administrator details.

### *Related Topics*

- [Oracle Learning Deep Links](#)

## Reconcile Learning Assignments for Updated Courses

You control when learners with active learning assignments see changes made to a course. Make the necessary changes and when you're ready to update learner assignments, use the new Reconcile Learning Assignments action.



The action is available on the course details page accessed using the Courses task on the **My Client Groups Learning** page.



# 15 Offering Administration

## Create an ILT or Blended Offering for an Oracle Learning Course

To create instructor-led and blended offerings for learning courses, you can search for, copy, and edit an existing ILT or blended offering. Or you can use these steps to create fresh instructor-led and blended offerings.

### Before you start

*Create a Course for the Oracle Learning Catalog*

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Offerings**.
2. On the Offerings page, select **Create > Instructor-Led Offering** or **Blended Offering**.
3. On the Create Offering: Select Course dialog box, search for and select the appropriate course.
4. Click **Select**.
5. On the Create Offering page, complete the required and relevant optional general information. Learners can see all of this general information when they view offering details in the learning catalog and for enrolled offerings.
  - o The new offering uses the course title by default. If you've multiple offerings for a course, be sure to make the offering title unique.
  - o The publish dates identify the period when learners can see the offering on their self-service pages. You also need to select offering dates, which are typically the first and last dates of the learning.
  - o You can set a primary classroom that's the default classroom for the activities. You can override this default when you configure the activities, as appropriate. Learners see the classroom location as city, state or province, and country.
  - o If you select a facilitator type of Instructor, you also need to select the primary instructor. You can override this default when you configure the activities, as appropriate.

**Note:** Sometimes the default facilitator attributes for the selected course change after you set the offering values and before you add activities. In these rare instances, the offering activities inherit the new course defaults and not these values.

- o Select an offering coordinator according to your learning administration policies. Either specify the specific learning administrator responsible for the offering. Or if the offering activities have different instructors, select the learning coordinator for those instructors.
- o Capacity rules let you limit the number of learners who can register for the offering. You can also let learners who self-enroll automatically join the waitlist, if it exists. Otherwise you need to add them to it.
- o You can't override pricing line items that the course has as required, but you can change the prices.
- o You can use the information in the Learning Items Additional Attributes section, in advanced searches for course offerings. And learners see it on their offering details page.

**Tip:** When you create offerings, it automatically generates read-only offering numbers. When you upload offerings using HCM Data Loader, you can specify your own numbers.

6. Click **Save and Close**.

## What to do next

*Add ILT Activities to a Blended or ILT Oracle Learning Offering*

### Related Topics

- [Course Offerings Definition for Oracle Learning](#)
- [Learning Activities Definition for Oracle Learning](#)
- [Add an Evaluation to an Oracle Learning Offering](#)

# Add ILT Activities to a Blended or ILT Oracle Learning Offering

After you create instructor-led and blended course offerings, you need to add the in-person or virtual supporting activities. Configure activity details and add related materials. Also configure advanced rules for completion, sequencing, and display.

## Before you start

Add the relevant activities. If you've enough activities, consider organizing them into sections. If you aren't using sections, activities get added to the default section. By default, learners don't see any information for this section, but they do see the activities. And the advanced rules that you configure for each activity decide completion, sequencing, and display.

## Here's what to do

1. On the offering details page, click the Activities tab.  
If you aren't using sections, skip to step 4. Otherwise continue to the next step.
2. On the Activities tab, edit the default section. The default section becomes visible after you add a second section. Here's what you want to do when that happens:
  - a. Update the section title and add a high-level description of what people will learn by completing the section activities.
  - b. Review the defaulted completion, sequencing, and display rules, and change them as appropriate.  
  
To make activities required, in the Defined By field, select Activity. If the section defines the completion rule, you can specify how many the section activities learners need to complete. But you can't make any of the section activities required. For example, the section has three activities—A, B, and C—and you specify that learners need to complete two activities. They can complete A and B, B and C, or A and C. You can't require that everyone complete A and optionally complete B or C.
  - c. Click **Save**.
3. Add and configure the remaining sections by completing these steps:
  - a. On the Overview section Add menu, select **Add Section**.
  - b. In the new section, complete the required and relevant optional details, including completion, sequencing, and display rules.
  - c. Click **Save**.

4. Add at least one ILT activity to the default section. If you're using sections, you need to add at least one activity to each section.

**Tip:** You can reposition activities in a section, but you can't move an activity to another section. You need to delete it from the current section and add it in the correct section.

- a. On the Add Activity page, complete the required and relevant optional details.
  - To avoid meeting errors, make sure that activity dates for ILT activities are after today's date.
  - To create multiple occurrences of an activity that repeats, select a Repeat option. If you need to change the activity later, you need to edit each individual occurrence.
  - To let learners manage their attendance, instead of the learning coordinator or instructor, select Allow person completing the activity to mark themselves complete.
- b. In the Advanced Rules section, review the defaulted completion, sequencing, and display rules and change them as appropriate.

**Tip:** You can set the activity type to Required or Optional only if the section completion rule is Activity.

5. Optionally add related materials to include information for reporting and alerts. For example, you create an automated report the day an activity is scheduled to occur. And you send an email to facilities that list required physical resources, such as notebooks and pens.
6. Click **OK**.

**Tip:** When you create activities, it automatically generates read-only activity numbers. When you upload activities using HCM Data Loader, you can specify your own numbers.

#### Related Topics

- [Course Offerings Definition for Oracle Learning](#)
- [Learning Activities Definition for Oracle Learning](#)
- [Add an Evaluation to an Oracle Learning Offering](#)

## Create a Self-Paced Offering for an Oracle Learning Course

To create self-paced offerings for learning courses, you can search for, copy, and edit an existing self-paced offering. Or you can use these steps to create fresh self-paced offerings.

### Before you start

*Create a Course for the Oracle Learning Catalog*

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Offerings**.
2. On the Offerings page, select **Create > Self-Paced Offering**.
3. On the Create Offering: Select Course dialog box, search for and select the appropriate course.
4. Click **Select**.

5. On the Create Offering page, complete the required and relevant optional general information. Learners can see all this general information when they view offering details in the learning catalog and for enrolled offerings.
  - o The new offering uses the course title by default. If you've multiple offerings for a course, be sure to make the offering title unique.
  - o The publish dates identify the period when learners can see the offering on their self-service pages.
  - o Select an offering coordinator according to your learning administration policies. Either specify the specific learning administrator responsible for the offering. Or if the offering activities have different instructors, select the learning coordinator for those instructors.
  - o Capacity rules let you limit the number of learners who can register for the offering. You can also let learners who self-enroll automatically join the waitlist, if it exists. Otherwise you need to add them to it.
  - o You can't override pricing line items that the course has as required, but you can change the prices.
  - o You can use the information in the Learning Items Additional Attributes section, in advanced searches for course offerings. And learners see it on their offering details page.

**Tip:** When you create offerings, it automatically generates read-only offering numbers. When you upload offerings using HCM Data Loader, you can specify your own numbers.

### What to do next

*Add Self-Paced Activities to a Blending or Self-Paced Oracle Learning Offering*

#### Related Topics

- *Add an Evaluation to an Oracle Learning Offering*

## Add Self-Paced Activities to a Blending or Self-Paced Oracle Learning Offering

After you create self-paced course offerings, you need to add the supporting activities, such as assessment, SCORM, observation checklist, pdf, video, and web content. Configure activity details and add related materials. Also configure advanced rules for completion, sequencing, and display.

### Before you start

1. *Create Questionnaires for Oracle Learning*
2. *Add an Assessment to Your Oracle Learning Content Resources*
3. *Create a Self-Paced Offering for an Oracle Learning Course*

Add the relevant activities. If you've enough activities, consider organizing them into sections. If you aren't using sections, activities get added to the default section. By default, learners don't see any information for this section, but they do see the activities. And the advanced rules that you configure for each activity decide completion, sequencing, and display.

### Here's what to do

1. On the offering details page, click the Activities tab.  
If you aren't using sections, skip to step 4. Otherwise continue to the next step.

2. On the Activities tab, edit the default section. The default section becomes visible after you add a second section. Here's what you want to do when that happens:
  - a. Update the section title and add a high-level description of what people will learn by completing the section activities.
  - b. Review the defaulted completion, sequencing, and display rules, and change them as appropriate.

To make activities required, in the Defined By field, select Activity. If the section defines the completion rule, you can specify how many the section activities learners need to complete. But you can't make any of the section activities required. For example, the section has three activities—A, B, and C—and you specify that learners need to complete two activities. They can complete A and B, B and C, or A and C. You can't require that everyone complete A and optionally complete B or C.

- c. Click **Save**.
3. Add and configure the remaining sections by completing these steps:
  - a. On the Overview section Add menu, select **Add Section**.
  - b. In the new section, complete the required and relevant optional details, including completion, sequencing, and display rules.
  - c. Click **Save**.
4. Add at least one self-paced activity to the default section. If you're using sections, you need to add at least one activity to each section.

**Tip:** You can reposition activities in a section, but you can't move an activity to another section. You need to delete it from the current section and add it in the correct section.

- a. On the Add Activity page, complete the required and relevant optional details.
  - To avoid meeting errors, make sure that activity dates for ILT activities are after today's date.
  - To create multiple occurrences of an activity that repeats, select a Repeat option. If you need to change the activity later, you need to edit each individual occurrence.
  - To let learners manage their attendance, instead of the learning coordinator or instructor, select Allow person completing the activity to mark themselves complete.
- b. In the Advanced Rules section, review the defaulted completion, sequencing, and display rules and change them as appropriate.

**Tip:** You can set the activity type to Required or Optional only if the section completion rule is Activity.

5. Optionally add related materials.
6. Click **OK**.

**Tip:** When you create activities, it automatically generates read-only activity numbers. When you upload activities using HCM Data Loader, you can specify your own numbers.

#### Related Topics

- [Course Offerings Definition for Oracle Learning](#)
- [Learning Activities Definition for Oracle Learning](#)
- [Add an Evaluation to an Oracle Learning Offering](#)

# Add an Evaluation to an Oracle Learning Offering

To get feedback about the learning material or the instructor, you can add an evaluation.

## Before you start

1. *Create Questionnaires for Oracle Learning*
2. *Set Default Evaluations for Oracle Learning Course Offerings*
3. *Create a Course for the Oracle Learning Catalog*
4. *Create an ILT or Blended Offering for an Oracle Learning Course*

or

*Create a Self-Paced Offering for an Oracle Learning Course*

## Here's what to do

1. On the offering details page, click the Activities tab.
2. On the Overview section, Add menu, select **Add Evaluation**.
3. In the Evaluation section, the last section on the Activities tab, specify whether to use the default evaluation or another evaluation. The name of the default evaluation appears as read-only information in the Evaluation field. To help you decide, you can preview the evaluation. If you select another evaluation, you can also preview it.

**Tip:** If you use the default evaluation and it gets changed later, anyone completing the evaluation after the change gets the new evaluation. It doesn't matter if you change the offering definition. If you select a different evaluation and the default evaluation changes, learners continue to get the selected evaluation.

4. If using an evaluation other than the default, you can specify whether learners need to complete the evaluation before Oracle Learning considers the offering complete. If you use the default evaluation, the setting on the Configure Evaluations page applies. You can't override it.
5. Click **Save and Close**.

# Check in Learners for Instructor-Led Training (ILT) in Oracle Learning

Provide activity completion dates and status changes using Manage Activities on the offering details page, Learners tab. Also mark activities complete using **Mass Actions > Mark Activities Complete** or **More Actions > Edit learning activities in a spreadsheet**.

With the spreadsheet, you can also set completion dates for the downloaded activities, update statuses, and provide reasons for the changes. Then you upload the changes to Oracle Learning.

You get to an offering details page using the Offerings task on the **My Client Groups > Learning** page. You can also manage activities using the Learnings Assignments task. The more and mass actions are available on only the offering details pages.



## Check Learner Progress Completing Offering Activities in Oracle Learning

Here's how you can check the activity progress of any learner associated with a course offering in Oracle Learning. The progress value, in the format X / Y, shows how many activities the learner completed of the total required activities.

1. On the **My Client Groups > Learning** page, click the **Offerings** task.
2. On the Offerings page, search for and select the relevant offering.
3. Click **Learners**.
4. On the offering details page, Learners tab, you can see each learner's progress in the Progress column. If the column isn't present, you can show it using the **View** menu.

## What You Can Do with Existing Oracle Learning Offerings and Activities

You can edit course offerings and activities, end date offerings, and delete activities. Also copy offerings and their activities, copy only activities, and reorder nontimed activities. And, create automatic learning assignments by linking learning initiatives to offerings.

**Note:** Timed activities appear in chronological order, so an earlier activity can't appear after a later activity.

### Related Topics

- [Oracle Learning Assignments](#)
- [Oracle Learning Initiatives](#)
- [Assign Learners to a Catalog Learning Item](#)

## Implications of Changing an Offering Activity from Required to Optional

The impact of changing an offering activity from required to optional for a course with multiple activities depends on where the learner is in the Oracle Learning assignment life cycle.

- Learners who completed the course assignment aren't impacted.
- Active course assignments are marked as Completed as soon as learners complete all the required activities. The newly optional activity remains required for these learners until you run the Reconcile Learning Assignments process from the offering details page, Actions menu. After the process completes, the activity becomes optional for them.

- Learners with future renewal course assignments that include the activity will see the activity as optional instead of required.

## View Answers on Assessments, and Feedback on Evaluations and Observation Checklists

Here's how you can view answers and scores in Oracle Learning for a learner's most recent assessment attempt. It's also how you can view evaluation and observation checklist questions and feedback.

1. On the **My Client Groups > Learning** page, click **Offerings**.
2. On the Offerings page, search for and click the offering that contains the assessment, evaluation, or observation checklist to review.
3. Click **Learners**.
4. Search for and select the learner with the assessment, evaluation, or observation checklist to view. In the Assignment Status field, select **Completed** to see only the learners who completed the assessment or evaluation, or with a completed observation checklist.
5. Click **Manage Activities**.
6. On the Activities dialog box next to the offering name, click the information icon.
7. In the activity dialog box, click **View**.

You see the specific questions, answers, and points given for only the most recent assessment attempt. Earlier assessment attempts aren't available. For evaluations, you see the questions and feedback. For observation checklists, you see the questions the observer answered and any comments they made.

## Reset the Status for a Learner's Failed Oracle Learning Offering Assessment or Online Content Activity

If a learner failed the learning assignment for an offering and course, and can't try the online or assessment content again, reset their status. Or increase the recorded attempts for the assessment or online content.

### Here's what to do

- On the **My Client Groups > Learning** page, click **Offerings**.
- On the Offerings page, search for and select the offering that the learner failed.
- Click **Learners**.
- Search for and select the learner with the failed assessment or online content.
- Click **Manage Activities**.
- On the Activities dialog box, reset the appropriate activities. Either click **Reset All Activities** or, next to the activity name, click **Reset**.

### Results:

The learner's completion status for the affected activities, the offering, and the course changes to **Not Started**.

*Related Topics*

- [How Recorded Attempts Affect Oracle Learning Statuses and Scores](#)

## When Learners Can't See Their Assessment Scores in Oracle Learning

Check the questionnaire template for the assessment. And on the content details page for the assessment, make sure that you select the **Score Questionnaire** check box.

*Related Topics*

- [Add an Assessment to Your Oracle Learning Content Resources](#)
- [Create Questionnaires for Oracle Learning](#)

## Why Keep an Oracle Learning Offering Overbooked

You might want to keep an offering overbooked if you know that you'll eventually withdraw or move active learners to the waitlist. Keeping the offering at maximum capacity, prevents other learners from joining or the waitlist from automatically filling empty seats.

You might also want to keep it overbooked if you know that you'll be changing the venue to accommodate a larger audience. This way you can activate learners and then increase the maximum capacity to fit the number of booked seats.

## Reconcile Learning Assignments for Updated Offerings

You control when learners with active learning assignments see changes made to an offering. Make the necessary changes and when you're ready to update learner assignments, use the Reconcile Learning Assignments action.

The action is available on the course details page accessed using the Offerings task on the **My Client Groups Learning** page.



# 16 Specialization Administration

## Create a Specialization for the Oracle Learning Catalog

To create the learning plan or path for the larger learning objective, you can search for, copy, and edit an existing specialization. Or you can follow these steps to create fresh specializations.

### Before you start

- Create a branding image and save it in a local folder.
- Create a trailer video and publish it so that it's available under My Published Videos.

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Specializations**.
2. On the Specializations page, click **Create**.
3. On the Create Specialization page, complete the required and relevant optional general information. Learners can see all this general information when they view specialization details in the learning catalog and for enrolled specializations.

When you create specializations, it automatically generates read-only specialization numbers. When you upload specializations using HCM Data Loader, you can specify your own numbers.

4. Optionally add learning outcomes and prerequisites, such as skills, competencies, honors and awards, languages, licenses and certifications, and memberships. The outcomes and prerequisites you can add, and the corresponding properties and drop-down lists, come from the Prerequisites and Person profile types.

To see more properties, such as renewal and expiration date options, expand each prerequisite and outcome that you add. For example, to make a certification dependent on learning assignment dates, you expand the certification outcome. Then you can set the same expiration date for the certification as the learning assignment. And you can set a certification issue date that matches the learning assignment's validity start date.

When learners complete refresher specializations before learning outcomes with expiration dates expire, such as certificates and licenses, their outcomes don't get updated. Keep this in mind when you set expiration and renewal dates.

5. Optionally link the specialization to one or more learning communities.
6. Click **Save and Close**.

### What to do next

*Add Courses as Activities to an Oracle Learning Specialization*

### Related Topics

- [Course Definition for Oracle Learning](#)
- [Specialization Definition for Oracle Learning](#)
- [Oracle Learning Prerequisites and Outcomes, and Talent Prerequisite and Person Profile Types](#)
- [My Learning Communities](#)

# Add Courses as Activities to an Oracle Learning Specialization

After you create the specialization for a larger learning objective, add the supporting courses as activities. Set up appropriate sections to group related activities, add the relevant courses, and configure advanced rules for completion and sequencing.

## Before you start

### *Create a Specialization for the Oracle Learning Catalog*

Add the relevant courses as specialization activities. If you've enough activities, consider organizing them into sections. If you aren't using sections, activities get added to the default section. By default, learners don't see any information for this section, but they do see the activities. When appropriate, you can select the **Enable as a visible section to learners** option and change the default name to better reflect the section content. And the advanced rules that you configure for each activity decide completion, sequencing, and display.

## Here's what to do

1. On the specialization details page, click the Activities tab.  
If you aren't using sections, skip to step 4. Otherwise continue to the next step.
2. On the Activities tab, edit the default section.

The default section becomes visible after you add a second section. Here's what you want to do when that happens:

- a. Update the section title and add a high-level description of what people will learn by completing the section activities.
- b. Review the defaulted completion, sequencing, and display rules, and change them as appropriate.

To make activities required, in the Defined By field, select Activity. If the section defines the completion rule, you can specify how many the section activities learners need to complete. But you can't make any of the section activities required. For example, the section has three activities—A, B, and C—and you specify that learners need to complete two activities. They can complete A and B, B and C, or A and C. You can't require that everyone complete A and optionally complete B or C.

Use these descriptions to help you select the appropriate experience when learners launch the activity.

- **Inherit from Activity:** Learners see the same behavior for the course, whether they access the course directly or through the specialization.
  - **Inherit from Specialization:** Learners see the same behavior that they had for the specialization enrollment, for example, Request mode or Active mode.
  - **Active:** Learners enrolled in this specialization can sign up for courses in this specialization, regardless of the course configuration.
  - **Requested:** When they try to join, learners need to request the courses in this section, regardless of the course configuration.
- c. Click **Save**.

3. Add and configure the remaining sections by completing these steps:
  - a. On the Overview section Add menu, select **Add Section**.
  - b. In the new section, complete the required and relevant optional details, including completion, sequencing, and display rules.
  - c. Click **Save**.
4. Add at least one course as an activity. If you're using sections, you need to add at least one activity to each section.

**Tip:** You can reposition activities in a section, but you can't move an activity to another section. You need to delete it from the current section and add it in the correct section.

- a. On the Add Activity page, complete the required and relevant optional details.
- b. In the Advanced Rules section, review the defaulted completion, sequencing, and display rules and change them as appropriate.
  - Tip:** You can set the activity type to Required or Optional only if the section completion rule is Activity.
- c. Click **OK**.

#### Related Topics

- [Course Definition for Oracle Learning](#)
- [Specialization Definition for Oracle Learning](#)
- [Oracle Learning Prerequisites and Outcomes, and Talent Prerequisite and Person Profile Types](#)
- [My Learning Communities](#)

## Oracle Learning Specialization Configuration Options: Learners, Conversations, Community Usage, and Default Access

You can assign a specialization to learners and manage conversation configurations for learning administrators, on self-service learning pages, and for enrollees. You can also manage community usage and default access.

To get to these configuration options, on the Specializations page, click the name of an existing specialization. To assign a specialization to learners, you can also select it and click **Learners**.

## Check Learner Progress Completing Specialization Activities in Oracle Learning

Here's how you can check the activity progress of any learner associated with a specialization in Oracle Learning. The progress value, in the format X / Y, shows how many activities the learner completed of the total required activities.

1. On the **My Client Groups > Learning** page, click the **Specializations** task.
2. On the Specializations page, search for and select the relevant specialization.

3. Click **Learners**.
4. On the specialization details page, Learners tab, you can see each learner's progress in the Progress column. If the column isn't present, you can show it using the **View** menu.

## Reconcile Learning Assignments for Updated Specializations

You control when learners with active learning assignments see changes made to a specialization. Make the necessary changes and when you're ready to update learner assignments, use the new Reconcile Learning Assignments action.

The action is available on the course details page accessed using the Specializations task on the **My Client Groups Learning** page.



# 17 Community Administration

## Oracle Learning Communities

Communities are places where members have access to a specific part of the learning catalog. These places can also let members interact with each other regarding that content. Communities can range from collaborative to formal, and can include assignments.

Here are examples of different learning communities:

- A learning administrator creates a management community and assigns it to members with manager roles and jobs.
- A department head creates a facilities community for the whole organization to help members gain knowledge. The community focuses on specific areas, such as OSHA compliance, hazardous waste handling, and ergonomic best practices.
- A domain expert creates a development community as a central place from which to distribute the newest, relevant tools, standards, and guidelines. Members regularly participate in discussions about these areas and share their personal experiences.
- A technical team leader creates a tech community with their team as members. These members can publish their insights in the community and exchange interesting work-related articles, videos, and learning journeys.

You set the privacy level and specify whether members can contribute to the community when you create a community. You can also add related materials that you can't include in the community catalog. To edit the definition and manage assignments, the catalog, conversations, and membership, you click the name of an existing community. The characteristics that you can set depend on the type of community.

## Category and Topic Communities in Oracle Learning

You can create an organized structure for the content that learners see when browsing the learning catalog, using category and topic communities. The same hierarchical structure applies to official and self-service learning community catalogs.

For example, to help learners find content about Microsoft Office, you create these topic communities: Microsoft Word, Microsoft Excel, Microsoft PowerPoint, and Microsoft Outlook. Then you add relevant learning items to the community catalog. Next you create a Microsoft Office category community and include your Microsoft topic communities.

Categories can contain topic and official communities. They can also include cover art and let only learning administrators have conversations.

- Limit your hierarchy to 5 to 10 categories. Browsing becomes cumbersome when you've more than 15 categories.
- Keep category titles to 20 characters or fewer if possible.

Topics can contain official communities, self-service communities, courses, specializations, videos, and learning journeys. You can configure them for both learning administrator and self-service (member) conversations.

- Ideally have 3 to 10 topics per category. If you've more than 10 topics, consider creating another category.

- Ideally have at least 3 learning items per topic. If you've fewer than 5 items, consider merging topics.

You create and manage category and topic communities using the Communities task on the **My Client Groups > Learning** page. You decide how learners can browse the learning catalog, including categories, using the Configure Self-Service task.

## Category Views on the Self-Service Browse Learning Page

When people open their Browse Learning page, they see category views showing the topics and learning in the category, such as Cloud, Software Development, Creative, Business, and Finance. You decide the actual category names that they see when you create category communities.

An image carousel shows people the five most recently featured items in the category. Each featured topic includes the topic cover art, title, and description. Each view row is a topic community that's part of the category, which they can follow and unfollow. And each topic community shows up to 25 learning items that are part of the topic.

# Official and Self-Service Communities in Oracle Learning

You can give learners access to relevant organization-provided content with official communities. You can also automate assignments for required members. Let learners share their knowledge with colleagues using self-service communities.

Here's an example of each type of community:

- To give new hires access to initial training and relevant documents, you create the official Onboarding community.
- An individual in a retail chain store creates the Holiday Decorations self-service community so that members across stores can inspire each other. Members can create and share short videos that describe what they did and why.

**Tip:** Learners can browse for and enroll in official and self-service communities with open and closed privacy settings even if they can't browse by categories. They also see the communities that you add them to as members or required members.

Here's a list of the main characteristics for official and self-service communities:

Characteristic	Description
Create and manage	Official: Use the Communities task on the <b>My Client Groups &gt; Learning</b> page. Self-service: From the <b>Me &gt; Learning</b> page. You can also manage them from the <b>My Client Groups &gt; Learning</b> page.
Member contributions	Learning administrators and community managers can enable for all members or no members. <b>Tip:</b> Videos and learning journeys self-published by the community manager have the community name as the contributor, instead of the person's name.

Characteristic	Description
Related materials	Can add attachments.
Assignments	Learning administrators and community managers can create assignments that existing and future required members need to complete by the specified due date. Assignments are most relevant in official communities. Learning administrators can also manage assignments using the Learning Assignments task.
Catalog	Can contain official communities, self-service communities, courses, specializations, videos, and learning journeys.
Conversations	Can configure both learning administrator conversations and self-service (member) conversations.
Self-service pages	List these communities.

## Privacy Options for Oracle Learning Communities

You can set community privacy to open, closed, or secret for category, topic, official, and self-service communities.

- **Open:** Learners can search for and view the community in the catalog. They can also enroll in it. Anyone, including nonmembers, can recommend the community.
- **Closed:** Learners can search for and view the community in the catalog. They can also request enrollment. Anyone, including nonmembers, can recommend the community.
- **Secret:** Only learning administrators, the community managers, and members can access the community. No one can recommend the community.

When you need to hide category and topic communities, use this privacy setting.

## How Open and Closed Oracle Learning Communities Appear to Nonmembers

Nonmembers see the branding image, trailer, description for both communities. They can also see the catalog and conversations for open communities. They can't see the catalog and conversations for close communities.

Nonmembers can join an open community and request to join a closed community. The community manager for a closed community approves the request and adds them as a member, or declines the request.

## What Happens When You Change the Privacy Setting for an Oracle Learning Community

You can change the community privacy setting from open to closed or secret, closed to open or secret, and secret to closed or open.

When you change a closed or secret community to open, everyone can view it and its catalog. All the pending join requests for the closed community get approved automatically and those learners get added as members.

**Note:** Learners can't reopen declined requests from before the change, but they can now join the open community.

When you change an open or secret community to closed, anyone can find it. But only both types of community members can view the community details, catalog, and conversations.

When you change open or closed communities to secret, only the community managers and both types of members can find and access it.

## The Difference Between Removing and Deleting Items from the Oracle Learning Community Catalog

Removing a learning item from the community catalog only removes it from the community catalog. It doesn't remove it for the larger learning catalog. Deleting the learning item removes it from both catalogs.

You need to confirm Delete actions to ensure that you don't permanently remove learning items by mistake.

Community managers can remove any learning item from the community catalog. But they can't delete learning items published by the community. Community members and required members can only remove learning items they added.

## Oracle Learning Community Membership and Managers

A community has at least one manager, members, and required members. As a community manager or learning administrator, you can add and remove members, required members, and other community managers. You can also change member roles.

You add and remove members, required members, and static member sets on the Access tab of the open or closed community Membership page. To dynamically decide members and required members, you can add access groups. The Process User Access process, which typically runs daily, adds and removes members according to whether they still meet the specified criteria. For example, you create an access group for a specific organization. The members in that group change over time as people join and leave the organization. You also approve and decline membership requests for closed communities. Removing a required member also withdraws all their incomplete assignments.

You can change a member to required member and a required member to member, if they're a subordinate or in your area of responsibility. Changing a required member to member also withdraws any of their incomplete assignments.

You can add more community managers to help manage assignments, the catalog, and membership. If the person wasn't a member when you add them, they also get added as a member. If they're also a required member, they get assignments.

Community managers and members can leave the community at any time. But required members--including those who are also community managers--need a community manager or learning administrator to remove them.

**Note:** A community must have at least one manager. The last manager can't leave the community until they get another manager.



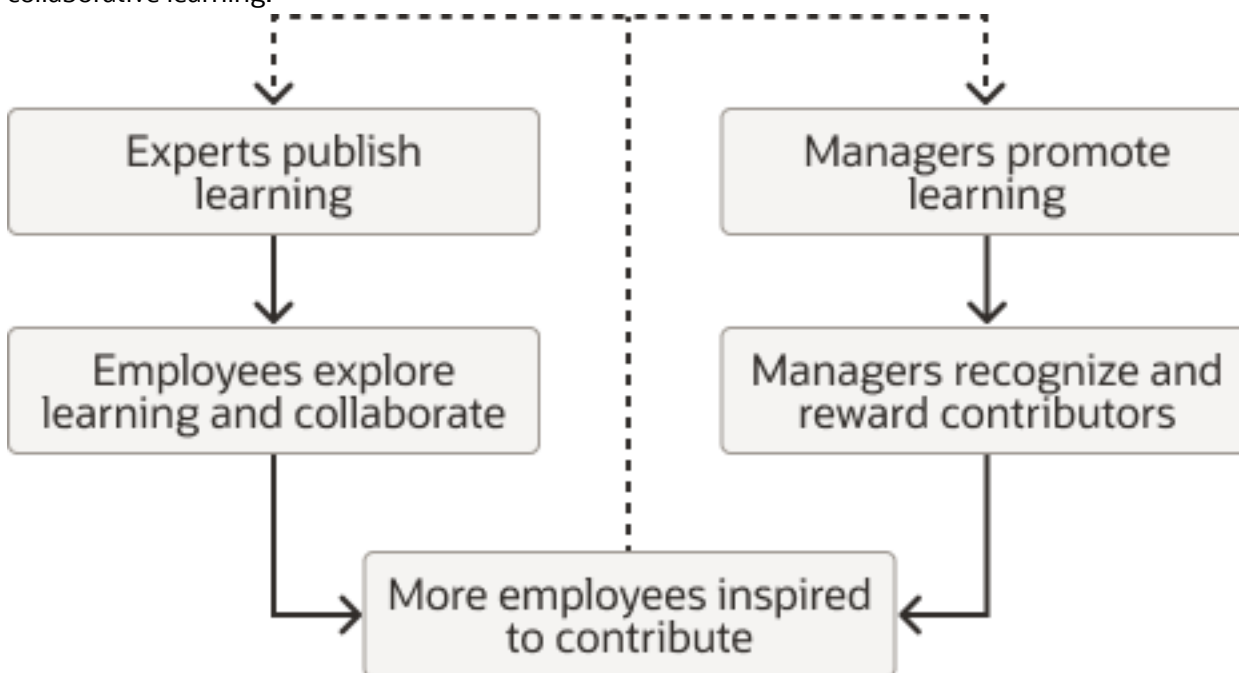
# 18 Learner-Created Content

## Foster Collaborative Learning and Knowledge Sharing

Many skills evolve too quickly for formal learning plans to keep pace. To complement your formal learning items and remain competitive, you can encourage collaborative learning through self-published videos and learning journeys.

Collaborative learning can equip learners with the newest best practices, methods, and technologies to use while doing their work. To create a positive environment for collaborative learning, you might need to adjust your organization's culture. Executives and managers can use their leadership to empower and encourage collaboration and knowledge sharing.

A cyclical flow showing how social recognition and management encouragement inspire growing involvement in collaborative learning.



### Remove Barriers to Publication

Let individuals share their knowledge with minimal interference. Long approval chains and demanding standards dampen enthusiasm and prevent timely sharing. A more hands-off approach, with short or no approval chains, lets individuals more quickly produce learning content with varied points of view. It also lets your learning communities self-curate.

### Encourage Collaboration

Executives can encourage collaboration by actively sharing insights with the organization. Here are examples of how managers can also encourage collaboration:

- Require their teams to complete certain learning items.

- Encourage peer-to-peer learning recommendations.
- Help individuals find better ways of doing their work using employee-sourced knowledge.

## Recognize and Reward Contributors

Many contributors share because of enhanced reputations resulting from likes and recommendations of their published content. Managers can further motivate collaboration by recognizing and rewarding key contributors in other ways, such as at team meetings or events. This also raises awareness of generates interest in the best knowledge.

## Train on Content Creation

Not everyone has the skills to share their knowledge effectively. If you've experts who are slow to get involved, you can provide training on content creation. As you help people convey their knowledge in concise and engaging stories, the quality of your learning resources improves.

### *Related Topics*

- [Oracle Learning Communities](#)
- [My Team Learning Actions](#)
- [Track Completion of Team Learning](#)

## Share Solutions to Promote Collaborative Learning

People can quickly publish videos that show their fixes to common customer issues. Through learning recommendations and sharing on Oracle Social Network, they can share these videos throughout the organization.

## Share Best Practices to Promote Collaborative Learning

Subject matter experts figure out best practices through experience. Others can learn these best practices when the experts share their knowledge in an engaging video or learning journey.

For example, a field technician publishes a learning journey about the best way to install a new product.

## Compete for Best Sales Pitch Video to Promote Collaborative Learning

You can use the competitive spirit of sales teams to have them publish videos of their sales pitches for new products and services. Then have their peers decide which video is best. The winner has the most Likes.



# The Difference Between an Oracle Learning Video and Journey

While both formats provide information about a particular topic, a learning video has just the video. A learning journey is a collection of content and can include videos. Also, learners play videos and View learning journeys.

Learning administrators create official learning videos and journey. Individuals, community managers, and contributing community members can also publish and share learning videos and journeys.

## Author an Oracle Learning Journey

Anyone can assemble content from the learning catalog, their computer, and external sites to create a public or secret learning journey. Also, anyone can recommend the learning journey to anyone else in your company.

1. On the **Me > Learning** page, click **My Shared Learning**.
2. On the My Shared Learning page in the Learning Journeys Authored section, click **Add**.
3. On the Author Learning Journey page, complete the learning journey details.
4. You need to include at least one section. In the Table of Contents section, click **Add**.

The actual sections that you add to your learning journey are specific to the learning journey. You can't reuse them in other learning journeys.

- a. On the Add Section page, enter a title and description.
  - b. Optionally add media from the learning catalog. Or add an image or web link.
  - c. If you add a web link, optionally add applicable files or attachments, including cover art.
  - d. Click **Done**.
5. On the Author Learning Journey page, review the privacy setting and revise as appropriate.
  6. Optionally add related materials.
  7. Click **Save and Close** or **Publish**.  
**Tip:** You can change saved and published learning journeys at any time but you can't version them.
  8. After you publish the learning journey, verify that it appears on your My Shared Learning page.  
You can recommend a public learning journey to anyone. You can recommend a secret learning journey to any of the specified viewers. If you're a learning community manager or contributing member, you can add the learning journey to the community catalog.

## Publish an Oracle Learning Video

You can share your knowledge by publishing learning videos.

1. On the **Me > Learning** page, click **My Shared Learning**.

2. On the My Shared Learning page in the Videos Published section, click **Add**.
  3. On the Publish Video page, add the video file.
    - o The supported source video formats are: .mp4, .m4a, .m4v, .f4v, .f4a, .m4b, .m4r, .f4b, and .mov.
    - o Videos can't be larger than 1GB. Use third-party applications to compress larger video files.
  4. Enter a title and description. The description appears in the Details section of the Video Details page.
  5. Review the privacy setting and revise as appropriate.
  6. Optionally add related materials.
  7. Click **Save and Close** or **Publish**.
- Tip:** You can change saved and published videos at any time but you can't version them.
8. After you publish the video, you get a notification that it's processing. After the processing finishes, you can verify that it appears on your My Shared Learning page.

You can recommend a public video to anyone. You can recommend a secret video to any of the specified viewers. If you're a learning community manager or contributing member, you can add the video to the community catalog.

# 19 Learning Assignments Administration

## Oracle Learning Assignments

Assign learners to an existing course, offering, or specialization using the Learning Assignments task. Also record external learning, request learning not already in the catalog, change learning assignment statuses, view approvals, send emails and alerts, and apply mass actions.

The Learning Assignments task is on the **My Client Groups > Learning** page.

All learning assignments can be voluntary or required and they give the learners access to the associated offering activities.

- **Required:** The learning assignment includes a completion date. You can identify the learners who don't finish the learning on or before the completion date and take appropriate action.
- **Voluntary:** The learning assignment doesn't include a completion date. Learners can take as long as they want to finish the training, or not finish it at all.

**Tip:** Learners can have only one active assignment for a course, offering, or specialization.

To assign catalog learning that learners need to complete, use the Catalog Learning Item request type. To record external learning that learners already completed or request learning that isn't already in the learning catalog, use the Noncatalog Item request type. Typically, learners record their own external learning, or managers record external learning completed by their entire team. And requests for noncatalog learning again typically come from learners and managers. Most commonly, after the learning department adds requested learning to the catalog, you link the catalog learning to the noncatalog request and activate the learning assignment.

### Related Topics

- [Optional Access and Enrollment Overrides for an Oracle Course, Offering, or Specialization](#)
- [Optional Enrollment and Access Overrides for Static and Dynamic Learner Sets in Oracle Learning](#)
- [Default Access and Enrollment for Oracle Learning Catalog Content](#)

## Assign Learners to a Catalog Learning Item

Assign a course, offering, or specialization to learners using the Learning Assignment tasks on the **My Client Groups > Learning** page.

1. On the Enrollment Details page, complete the required and relevant optional fields.
  - Only learning administrators see the required name and optional description.
  - The start date is when the learning becomes visible to learners in their current learning. They won't see it before then. If you need to start the assignment on a past date, use HCM Data Loader.
  - Optionally complete any enabled learning request descriptive flexfields.
2. Click **Next**.

3. On the Select Learners page, Add menu, select the method to use to identify learners. Or, you can use the Add a Person field.

Add Option	How You Identify Learners
Person	Provide search criteria, such as name, person number, department, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Save</b> .... In the Name field, replace <b>Search by Name copy</b> with a meaningful name.
Person Number List	Provide a list of person numbers. To upload a file, in the Type field select <b>Type</b> . To use a URL, in the Type field select <b>Text</b> .
Analysis Report Criteria	Specify an existing Oracle Transactional Business Intelligence (BI) analysis report that has the criteria to identify the appropriate learners.
Learning Assignment Criteria	Provide applicable values for learning assignment attributes, such as the learning name, type, assignment status, or a combination. Also specify whether learners need to match all the criteria or any of it.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.
Organization Chart Criteria	Search for and select the appropriate chart, such as Chris's Directs or Chris's Org.
Person Criteria	Provide search criteria, such as business unit, legal employer, job family, location, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.

4. On the dialog box, search for and select the criteria to find the appropriate learners for the assignment. What you see depends on your Add selection method.

To exclude specific individuals when you add learners using learning assignment or person criteria:

- a. On the criteria dialog box, click **Advanced**.
- b. On the Add Fields menu button, select the field you want to use to exclude people, for example, **Person Number**.
- c. Change the condition for the added field to **Does not equal**.
- d. Enter the appropriate value.
- e. Repeat steps b through d for each individual you want to exclude.

To exclude people when you use analysis report criteria, make sure that the report logic includes the exclusion criteria. When you select learners using analysis report and organization chart criteria, you can only search for and select the analysis or chart.

5. Click **Next**.
6. On the Advanced Rules page, review the default rules for the learning assignment and make changes, as appropriate.
- o If you're recording external learning, in the Initial Assignment Status field, select **Completed**.
  - o The validity rules, which include expiration and renewal options, apply to only required course assignments. Specializations have just renewal options.

7. Click **Submit**.

*Related Topics*

- [Prerequisites Options for Default Learning Enrollment in Oracle Learning](#)
- [Validity, Expiration, and Course Renewal Options](#)
- [Assignment Attribution Type Lookup for Oracle Learning](#)

## Record External Learning to Include in Learner History

Sometimes you need to record learning completed by learners outside of Oracle Learning, such as a workshop, on their behalf. You record the external learning by creating learning assignments with the Noncatalog Item request type.

1. On the **My Client Groups > Learning** page, click **Learning Assignments**.
2. On the Learning Assignments page, create the appropriate learning assignment.
3. On the Enrollment Details page, complete the required and relevant optional fields. Be sure to select the **Noncatalog Item** request type.
  - Only learning administrators see the required name and optional description.
  - The start date is when the learners see the learning item in their learning history. If you need to start the assignment on a past date, use HCM Data Loader.
  - Optionally complete any enabled learning request descriptive flexfields.
4. Click **Next**.
5. On the Select Learners page, add the learner.
6. Click **Next**.
7. On the Advanced Rules page, in the Initial Assignment Status field, select **Completed**.
8. Click **Submit**.

## Request Noncatalog Learning Get Added to the Oracle Learning Catalog

Sometimes you need to request learning that isn't already in the learning catalog. You make this request by creating learning assignments with the Noncatalog Item request type.

1. On the **My Client Groups > Learning** page, click **Learning Assignments**.
2. On the Learning Assignments page, create the appropriate learning assignment.
3. On the Enrollment Details page, complete the required and relevant optional fields. Be sure to select the **Noncatalog Item** request type.
  - Only learning administrators see the required name and optional description.
  - The start date is when the learners see the learning item in their learning history. If you need to start the assignment on a past date, use HCM Data Loader.
  - Optionally complete any enabled learning request descriptive flexfields.

4. Click **Next**.
5. On the Select Learners page, Add menu, select the method to use to identify learners. Or, you can use the Add a Person field.

Add Option	How You Identify Learners
Person	Provide search criteria, such as name, person number, department, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Save....</b> In the Name field, replace <b>Search by Name copy</b> with a meaningful name.
Person Number List	Provide a list of person numbers. To upload a file, in the Type field select <b>Type</b> . To use a URL, in the Type field select <b>Text</b> .
Analysis Report Criteria	Specify an existing Oracle Transactional Business Intelligence (BI) analysis report that has the criteria to identify the appropriate learners.
Learning Assignment Criteria	Provide applicable values for learning assignment attributes, such as the learning name, type, assignment status, or a combination. Also specify whether learners need to match all the criteria or any of it.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.
Organization Chart Criteria	Search for and select the appropriate chart, such as Chris's Directs or Chris's Org.
Person Criteria	Provide search criteria, such as business unit, legal employer, job family, location, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.

6. On the dialog box, search for and select the criteria to find the appropriate learners for the assignment. What you see depends on your Add selection method.

To exclude specific individuals when you add learners using learning assignment or person criteria:

- a. On the criteria dialog box, click **Advanced**.
- b. On the Add Fields menu button, select the field you want to use to exclude people, for example, **Person Number**.
- c. Change the condition for the added field to **Does not equal**.
- d. Enter the appropriate value.
- e. Repeat steps b through d for each individual you want to exclude.

To exclude people when you use analysis report criteria, make sure that the report logic includes the exclusion criteria. When you select learners using analysis report and organization chart criteria, you can only search for and select the analysis or chart.

7. Click **Next**.
8. On the Advanced Rules page, review the default rules for the learning assignment and make changes, as appropriate.
  - o The validity rules, which include expiration and renewal options, apply to only required course assignments. Specializations have just renewal options.

9. Click **Submit**.

*Related Topics*

- [Prerequisites Options for Default Learning Enrollment in Oracle Learning](#)
- [Validity, Expiration, and Course Renewal Options](#)
- [Assignment Attribution Type Lookup for Oracle Learning](#)

## Link Catalog Learning to a Noncatalog Request and Activate the Learning Assignment

After requested learning gets added to the Oracle Learning catalog, you can link it to the relevant noncatalog requests and active the learning assignments. Use the Learning Assignments task on the **My Client Groups > Learning** page.

1. On the Learning Assignments page, search for and select the noncatalog learning request. The requested learning item should have a status of Request Approved.
2. On the Change Status menu, select **Activate Assignment**.
3. On the Enrollment Details page, select the course to link to the request.
4. Click **Done**.

The learner requests that had a status of Pending Fulfillment are now mapped to the learning catalog course. Their learning statuses were updated to Active Not Started, and they can start the learning.

## Learning Item As-Of Options for Required Oracle Learning Assignments and Initiatives

Use these descriptions to select the most appropriate Learning Item As-Of Date version when you configure advanced rules for required learning assignments and initiatives.

- **Latest:** Learners see the most recently reconciled version of the learning item, until they complete the learning. Their learning history has the version in place on their completion date. For example, you assign them the learning item and they start the learning. They get half way through, save their progress, and stop. Before they resume the learning, you reconcile their learning assignment to update their learning with a new activity that they need to complete. When they resume the learning, they see the most recent content. If the learning item that they completed gets updated after they finish, their learning history won't have the newer learning item.
- **Assignment to Learner Date:** Learners always see the learning version that was in the catalog when you assigned the learning. Their version never reflects any later updates, regardless of whether they're doing the learning or they completed it.
- **Initiative Start Date:** Available only for learning initiatives. Learners always see the learning version that was in the catalog on the initiative start date. Their version never reflects any later updates, regardless of whether they're doing the learning or they completed it.

*Related Topics*

- [Reconcile Learning Assignments for Updated Offerings](#)
- [Reconcile Learning Assignments for Updated Specializations](#)
- [Reconcile Learning Assignments for Updated Courses](#)

## Validity, Expiration, and Course Renewal Options

When you configure a required course assignment in Oracle Learning, you can specify a validity period when learners are accredited for their completion. The period always has a start date and might have an expiration date.

For example, your organization requires everyone to complete a business ethics course every year by July 31.

You can also automatically renew the learning assignment according to a specified cycle and assignment completion.

You set validity period options for only required learning assignments. They aren't available for voluntary and recommendation learning assignments. The settings in course configurations also apply only to required learning assignments.

### Validity Period Start

The validity period is no earlier than the assignment completion date. But it might be later, depending on which of these options you select:

- **After completion** (default): The validity period starts when the learner completes the learning.
- **After due date**: The validity period starts no earlier than the assignment due date. If the learner completes the learning before the due date, the validity period starts on the due date. If the learner completes the learning after the due date, the validity period starts on the completion date.

### Validity Period Expiration

The expiration option decide whether the validity period ends, ends at the same time for all the learners, or ends according to each learner's completion date.

Expiration Option	Description	Example Configuration	Example Expiration Date
Never expires (default)	Assignment completion is valid forever	NA	NA
Expires on date	The day and month from the selected date and how many years out from the completion year to expire the validity period	15-Dec and 2 years	Learning completed on 31-Oct-2022 expires on 15-Dec-2024
Expires in years	How many years out from the validity period start date to expire the validity period	2 years	Learning completed on 31-Oct-2022 expires on 31-Oct-2024
Expires in days	How many days out from the validity period start date to expire the validity period	90 days	Learning completed on 31-Oct-2022 expires on 29-Jan-2023



## Renewal Options

The renewal options work with the validity period expiration to decide when to automatically generate the next learning assignments. Until the start date, only learning administrators can see the next assignments. Learners see them in their current learning on the start date.

### ***Do Not Create a Renewal Assignment (Default Option)***

On Completion Create the Next Assignment?	Example Configuration	Initial Assignment	Next Assignment
No, don't create any future assignments.	NA	Completed on 31-Oct-2022 Expires on 15-Dec-2024	NA

### ***Start Next Renewal Before Validity of Prior Assignment Ends***

On Completion Create the Next Assignment?	Example Configuration	Initial Assignment	Next Assignment
Yes. The start date is the specified number of days before its due date. The due date is the completion's expiration date.	Expires 2 years from 15-Dec-2022 Renews 30 days before expiration	Completed on 31-Oct-2022 Expires on 15-Dec-2024	Start date: 15-Nov-2024 Due date: 15-Dec-2024
	Expires in 2 years Renews 30 days before expiration	Completed on 31-Oct-2022 Expires on 31-Oct-2024	Start date: 1-Oct-2024 Due date: 31-Oct-2024
	Expires in 90 days Renews 30 days before expiration	Completed on 31-Oct-2022 Expires on 29-Jan-2023	Start date: 30-Dec-2022 Due date: 29-Jan-2023

### ***Start Renewal After Due Date of Prior Assignment***

On Completion Create the Next Assignment?	Example Configuration	Initial Assignment	Next Assignment
Yes. The start date is the specified number of days after the completion's due date. The due date is the completion's expiration date.	Expires 2 years from 15-Dec-2022 Renews 30 days after completion's due date	Due date: 15-Nov-2022 Completed on 31-Oct-2022 Expires on 15-Dec-2024	Start date: 15-Dec-2022 Due date: 15-Dec-2024
	Expires in 2 years Renews 30 days after completion's due date	Due date: 15-Nov-2022 Completed on 31-Oct-2022 Expires on 31-Oct-2024	Start date: 15-Dec-2022 Due date: 31-Oct-2024
	Expires in 90 days	Due date: 15-Nov-2022	Start date: 15-Dec-2022

On Completion Create the Next Assignment?	Example Configuration	Initial Assignment	Next Assignment
	Renews 30 days after completion's due date	Completed on 31-Oct-2022 Expires on 29-Jan-2023	Due date: 29-Jan-2023

### Start Next Renewal After Completion of Prior Assignment

On Completion Create the Next Assignment?	Example Configuration	Initial Assignment	Next Assignment
Yes. The start date is the completion's completion date. The due date is the completion's expiration date.	Expires 2 years from 15-Dec-2022	Completed on 31-Oct-2022 Expires on 15-Dec-2024	Start date: 31-Oct-2022 Due date: 15-Dec-2024
	Expires in 2 years Renews 30 days after completion's due date	Completed on 31-Oct-2022 Expires on 31-Oct-2024	Start date: 31-Oct-2022 Due date: 31-Oct-2024
	Expires in 90 days Renews 30 days after completion's due date	Completed on 31-Oct-2022 Expires on 29-Jan-2023	Start date: 31-Oct-2022 Due date: 29-Jan-2023

## Withdrawn Renewal and New Assignments

How Oracle Learning handles new assignments for learning with withdrawn renewals depends on whether completed assignments from the renewal series are expired.

- If the learner's completions are all expired, a new active assignment appears in their current learning. Because their final completion already expired, the renewal series no longer manages this learner.
- If the learner's final completion hasn't expired, a new assignment won't appear in their current learning. That's because the renewal series still manages this learner until their final completion expires.

### Related Topics

- [Create a Course for the Oracle Learning Catalog](#)
- [Create a Specialization for the Oracle Learning Catalog](#)

# Reassignment Conflict Rules for Oracle Learning Courses and Offerings

When you assign courses or offerings, you can decide the outcome for learners with existing, unexpired completions. You can reassign them to or exempt them from the new assignment. Optionally, you can use their existing completion date to decide the outcome.

When you reassign a learner, they see a new assignment in their current learning. They need to complete it according to the configured completion settings. If you exempt them, the learner won't see a new assignment in their current learning or learning history. But any learning administrator can see the new learning assignment with an Exempted status. The exempted assignment is evidence of the reassignment and exemption.

When reassigning learners with existing completions, you can specify when the validity of the existing completions expires. You base the validity on either the start or due date of the new assignment.

- If you expire the existing completion using the new assignment's start date, the learner immediately becomes noncompliant until they complete their new assignment.
- If you expire the existing completion using the new assignment's due date, the learner has a grace period before they're noncompliant.

You can also use these reassignment rules to get learners into synced renewals when they've existing nonrenewing completions. The existing completion date and the new assignment's renewal rules decide when the learner gets their new assignments for their current learning. After they complete their current assignment, they follow the renewal rules of their new assignment.

You can configure these renewal and assignment conflict rules when you create learning assignments or learning initiatives. You can also set up default renewal options and assignment conflict rules that apply when managers assign learning to their teams. Use the Configure Catalog Defaults task in the **My Client Groups > Learning** work area.

## Withdrawn Renewal and New Assignments

How Oracle Learning handles new assignments for learning with withdrawn renewals depends on whether completed assignments from the renewal series are expired.

- If the learner's completions are all expired, a new active assignment appears in their current learning. Because their final completion already expired, the renewal series no longer manages this learner.
- If the learner's final completion hasn't expired, a new assignment won't appear in their current learning. That's because the renewal series still manages this learner until their final completion expires.

### Related Topics

- [Create a Course for the Oracle Learning Catalog](#)

# Reassignment Conflict Rules for Oracle Learning Specializations

When you assign a specialization, you can decide the outcome for learners with existing, unexpired completions. You can reassign them to or exempt them from the new assignment. Optionally, you can use their existing completion date to decide the outcome.

When you reassign a learner, they see a new assignment in their current learning. They need to complete it according to the configured completion settings. If you exempt them, the learner won't see a new assignment in their current learning or learning history. But any learning administrator can see the new learning assignment with an Exempted status. The exempted assignment is evidence of the reassignment and exemption.

Before Learning looks at the renewal options for Completed or Bypass Completed assignments, it decides if the learners completed all required activities for the current assignment.

- If they have, the specified renewal options apply. This happens even if the required activities for the specialization changed, and learners have already completed the activities as part of another assignment or self-enrollment.
- If they haven't, they get a new assignment as specified for under All Other Existing Assignments. This can happen when the required specialization activities changed. Learners completed the required activities for their existing assignment, but not the more recently added activities required for the renewal assignment getting generated.

You can also use reassignment rules to get learners into synced renewals when they've existing nonrenewing completions. The existing completion date and the new assignment's renewal rules decide when the learner gets their new assignments for their current learning. After they complete their current assignment, they follow the renewal rules of their new assignment.

You can configure these renewal and assignment conflict rules when you create learning assignments or learning initiatives. You can also set up default renewal options and assignment conflict rules that apply when managers assign learning to their teams. Use the Configure Catalog Defaults task in the **My Client Groups > Learning** work area.

## Related Topics

- [Initial Learning Record Status Options for Default Learning Enrollment in Oracle Learning](#)
- [Learning Item As-Of Options for Required Oracle Learning Assignments and Initiatives](#)
- [Create a Specialization for the Oracle Learning Catalog](#)

# Example of How to Get Learners into a Renewal Cycle Using Reassignment Conflict Rules

You can use course and offering reassignment rules to get your people into a regular retraining cycle. You do this by applying a new renewal cycle to their completed Oracle Learning assignments to decide when they get their next assignment.

In this example, we follow Bob, who completed the Business Ethics course on 20-Mar-2022. This learning assignment isn't a managed renewal and doesn't expire. Bob is compliant with the course forever. But, your business requirements changed. Now your people, including Bob, need to complete the Business Ethics course every year. You create another learning assignment that includes Bob and Lisa in the target audience, and set these options for validity period, renewal, and assignment conflict rules:

Field	Value
Validity Period Starts	After completion
Validity Period Expires	Expires in years
Valid for	One Year
Renewal Options	Start next renewal before validity of prior assignment ends
Days Before Validity Period Ends	30
Learners with Existing Completions and Bypassed Completions	Must retake the learning
Learners Who Need to Retake, Expire Their Completion On	Apply new assignment renewal rules to existing completion

These renewal options mean that after they complete their initial assignment, the learners need to retake this course every year. And they've 30 days to complete it before their existing completion expires and they become noncompliant until they complete their assignment. The conflict rules tell the Process Learning Records process how to decide who in the target audience has an assignment that's successfully completed. The process then applies the renewal rules using the completion date of those completed assignments.

So what happens for Bob and Lisa, who are in this target audience? Bob already completed their initial assignment on 20-Mar-2022, and Lisa has no prior assignment.

- Bob gets a new assignment on 18-Feb-2023 that's due on 20-Mar-2023. The expiration date of the completed assignment is updated to 20-Mar-2023. Bob gets their next assignment on 18-Feb-2023 because the renewal options say that their renewal cycle is based on their 20-Mar completion date. 18-Feb-2023 is 30 days before their 20-Mar-2023 completion date.
- Lisa gets their initial assignment dated today, 21-Nov-2022 with a due date of 31-Dec-2022.

When Bob and Lisa complete their new assignment, the Process Learning Records process generates their next assignment automatically. You took Bob from a perpetually valid single assignment completion and put them in a managed retraining cycle where they need to complete Business Ethics every year.

## Basic Principles to Note

These two basic principals can alter outcomes like Bob's:

- The Processing Learning Records process never back dates the expiration date of the most recent completed learning assignment. That's because doing so would remove past facts, making learners who were compliant yesterday noncompliant today. Where necessary, you can manually expire a completed assignment before moving the person into a new renewal cycle.
- The Processing Learning Records process never creates an initial or next learning assignment that starts in the past. Doing so would falsify when it really created the assignment. It also most likely leads the assignment being overdue, which isn't a desirable experience for the learner.

Considering these two principals, let's revisit Bob's Business Ethics assignment, changing the original completion date 20-Mar-2021 instead of 2022. You still create their next assignment today, 21-Nov-2022. If we go with the standard logic shown in the original scenario, their next assignment would be due 20-Mar-2022, which is 8 months ago. That assignment would have Bob in noncompliance for 8 months, which wasn't the case yesterday, when they didn't have their next assignment. Instead, the process treats Bob similarly to Lisa and generates a new assignment dated today and due 31-Dec-2022.

The result for Bob is the same in both examples. Bob is now in a managed renewal and needs to retake the Business Ethics course every year. But if Bob's existing completion was recent enough relative to their renewal cycle you want them in, they don't need to retake the training immediately. If their completion was older than the retraining cycle you're defining, they need to retake the training now, just like anyone else in the target audience.

## Skipped Assignments

Review assignments that the Process Learning records process couldn't process, on the Skipped Assignments tab of the Learning Assignments page. Possible reasons for the skip include the assignment being a duplicate or completion dates that are before the start dates.

To open the page, use the Learning Assignments task on the **My Client Groups > Learning** page.

## Email Learners and Their Line Managers About Oracle Learning Assignments, Send Alerts, and View Approval Tasks

You can email a learner, their manager, or both about a learning assignment using More Actions options on the Learning Assignments tabs or page. Also send an alert view any approval task.

You can also send alerts to multiple learners or everyone in the learner results using the Mass Actions option. And you can send alerts to learners or instructors using the Actions menu on the offering details page.

- With learner alerts, you can let the learners know that they were added to or removed from activities. You can also let me know about classroom changes and changes to activity dates.
- With instructor alerts, you can let the instructors know about changes to their activities.

## Act on Multiple Oracle Learning Assignments

You can activate multiple learning assignments at the same time. Also bypass and approve, reject, complete, or withdraw assignments, and update assignment learning dates. Use the Mass Actions button on the Learning Assignments page.

The mass action starts the Oracle Learning Cloud Bulk Processing process in the background to update the learning assignments according to the selected option.

## Learning Dates

You can update any one of these learning dates:

Date	Description
Assignment	When the assignment appears in the learner's current learning. You can update it only to on or after today. Change on any assignment.
Due	When a required assignment is due. You can update it to any date after the assignment date. Change on any required assignment.
Completion	When the learner completed the assignment. You can update it only to on or before today. Change on any assignment with these statuses: <ul style="list-style-type: none"> <li>Completed</li> <li>Bypass Completed</li> <li>Not Passed status</li> </ul>
Expiration	When a completion's validity ends. You can update it only to after today. Change on any completed assignment.

### Related Topics

- [Change Status Options for Oracle Learning Assignments](#)
- [Background Processing in Oracle Learning](#)

## Mass Assign Oracle Learning Using Microsoft Excel or Notepad Files

You can mass assign learning items by creating a person number list using either Microsoft Excel or Notepad.

### Microsoft Excel Assignments

- If you're saving the content as an .xls file, enter all the person numbers in the same field, separated by commas. Here's an example: 0001234, 00005678, 00009123.
- If you're saving the content as a .csv file, you can enter all the person numbers in the same field, separated by commas. Or you can enter them in separate rows. If you're using separate rows, make sure to add a comma at the end of each number. Also, the separator between rows must be only a carriage return (CR) and not a CRLF. The commas generated when you save the file aren't a replacement for the commas you add.

To retain any leading zeros, format the fields containing person numbers as text.

### Notepad Assignments

To create a list of person numbers in Notepad, enter the person numbers and separate each number with a comma. Here's an example: 12345, 543321, 98765.

## How Learning Administrators Can View People's Learning History

You can view someone's Oracle Learning history from their public information page, using the Learning task on the left.

Whose learning history you can access depends on your data security privileges. You also need to have the View Learning Assignments role.

## View and Print Learner Transcripts

You can download a .pdf file with a learner's completed and bypass completed learning for a specified date range. Use the View Transcript action on the Redwood Learning Assignments page, Learning Assignments or Assignments Summary tab, Learner view.



# 20 Learning Initiative Administration

## Oracle Learning Initiatives

To automatically generate and withdraw voluntary and required learning assignments with or without end dates for offerings, courses, and specializations, use learning initiatives. Also generate and withdraw recommendations for these types of learning items.

For example, generate required learning assignments for people as they join the Finance department and withdraw the assignments for people that leave.

The Evaluate Person IDs for Assignment Rule and Reconcile Dynamic Assignments background processes run regularly and decide if nonlearners match initiative learner criteria. They also identify existing learners who no longer match the learner criteria. The active initiatives then generate and withdraw learning assignments as appropriate.

**Note:** The **Change Status > Withdraw** action and **Update Learning Assignment Statuses to Deleted or Withdrawn for Learners Whose Employment Was Terminated** process are overrides for the learning initiative. So the learning initiative won't later re-activate assignments withdrawn by either of these methods. You can reactivate these withdrawn assignments using the **Change Status > Activate** action on the Learning Initiatives page.

If you inactivate an initiative, you can't make it active again. You need to create another initiative.

### Related Topics

- [Evaluate Person IDs for Assignment Rule](#)
- [Reconcile Dynamic Assignments](#)

## Automatically Add Learners to and Withdraw Them from a Course, Offering, or Specialization

Automatically add learners to and withdraw them from a course, offering, or specialization. Use the Learning Initiative task on the **My Client Groups > Learning** page. Or use the **Learners > Learning Initiatives** tab on the course, offering, or specialization details page.

1. On the Learning Initiatives page, Add Learners menu, select the assignment type--**Voluntary** or **Required**, or select **Recommendations**.
2. On the Enrollment Details page, complete the required and relevant optional fields.
  - Only learning administrators see the required name and optional description.
  - The Request Type section fields that you need to complete depend on whether the assignment is for a catalog learning item or noncatalog item. Noncatalog items are external learning that you want to record in a learner's history, such as a completed college course.
  - The start date is when the learners see the learning item in their current learning. If you need to start the assignment on a past date, use HCM Data Loader.

- o The ongoing due date is used by the Process Learning Records process during initiative reconciliation and not during the initial creation. Here's an example of how it works.

You create the initiative on March 25, 2023 with an initial due date of May 1, 2023. The initial process that runs on March 25 identifies 100 learners for the initiative. It generates their assignments with start dates of March 25, 2023 and due dates of May 1, 2023.

Here's what happens when the process runs on April 15, 2023 and identifies new learners:

Ongoing Due Date Option	Example
<b>Days</b> (recommended): Relative due dates for the assignments generated not during the initiative creation	The ongoing due date is 30 days so the process generates assignments with start dates of April 15, 2023 and due dates of May 15, 2023.
<b>Date:</b> Fixed due dates for the assignments generated not during the initiative creation	The ongoing due date is May 1, 2023 and the minimum days to complete is 30. The process generates assignments with start dates of April 15, 2023 and due dates of May 1, 2024. It does this because there are fewer than 30 days between April 15 and May 1, 2023.

- o Optionally complete any enabled learning request descriptive flexfields.

**3. Click Next.**

- 4. On the Select Learners page, Add menu, select the method to use to identify learners. Or, you can use the Add a Person field.**

Add Option	How You Identify Learners
Person	Provide search criteria, such as name, person number, department, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Save....</b> In the Name field, replace <b>Search by Name copy</b> with a meaningful name.
Person Number List	Provide a list of person numbers. To upload a file, in the Type field select <b>Type</b> . To use a URL, in the Type field select <b>Text</b> .
Analysis Report Criteria	Specify an existing Oracle Transactional Business Intelligence (BI) analysis report that has the criteria to identify the appropriate learners.
Learning Assignment Criteria	Provide applicable values for learning assignment attributes, such as the learning name, type, assignment status, or a combination. Also specify whether learners need to match all the criteria or any of it.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.
Organization Chart Criteria	Search for and select the appropriate chart, such as Chris's Directs or Chris's Org.
Person Criteria	Provide search criteria, such as business unit, legal employer, job family, location, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.

5. On the dialog box, search for and select the criteria to find the appropriate learners for the assignment. What you see depends on your selection method.

To exclude specific individuals when you add learners using learning assignment or person criteria:

- a. On the criteria dialog box, click **Advanced**.
- b. On the **Add Fields** menu button, select the field you want to use to exclude people, for example, **Person Number**.
- c. Change the condition for the added field to **Does not equal**.
- d. Enter the appropriate value.
- e. Repeat steps b through d for each individual you want to exclude.

To exclude people when you use analysis report criteria, make sure that the report logic includes the exclusion criteria. When you select learners using analysis report and organization chart criteria, you can only search for and select the analysis or chart.

6. For recommendations, skip to step 9. For required and voluntary assignments, click **Next**.
7. On the **Advanced Rules** page, review the default rules for the learning assignment and make changes, as appropriate. To keep learners assignments and recommendations current, we recommend that you withdraw incomplete assignments and recommendations for learners who no longer match the learner criteria.

The validity rules, which include expiration and renewal options, apply to only required learning assignments.

**Tip:** The assignment conflict rules set when you submit the new initiative get applied as long as the initiative is active. You can't change them later. To apply different conflict rules, you need to create another initiative.

8. Click **Submit**.

#### *Related Topics*

- [Initial Learning Record Status Options for Default Learning Enrollment in Oracle Learning](#)
- [Prerequisites Options for Default Learning Enrollment in Oracle Learning](#)
- [Validity, Expiration, and Course Renewal Options](#)

## What Happens If Multiple Oracle Learning Initiatives Have the Same Learning

How the Reconcile Dynamic Assignments process automatically adds people to and withdraws them from learning initiatives depends on the order of initiative creation. In this example, the learning initiative configurations automatically withdraw learners who no longer meet the initiative criteria.

Chris meets the criteria for the Hospital 1 learning initiative when you first create it, so gets the appropriate learning assignment. Chris transfers to different location 6 months later. Chris no longer meets the criteria for Hospital 1, but does meet it for Hospital 2.

If Hospital 1 was created before Hospital 2, the next reconcile removes Chris from Hospital 1. If Chris already completed the learning assignment, it remains. If Chris didn't, the reconcile also removes the learning assignment. Then the reconcile adds Chris to Hospital 2 and generates the appropriate learning assignment.

If Hospital 1 was created after Hospital 2, the next reconcile doesn't add Chris to Hospital 2 because it hasn't yet removed Chris from Hospital 1. The reconcile does remove Chris from Hospital 1 and leaves or withdraws the learning

assignment depending on whether Chris already completed it or not. The second subsequent reconcile doesn't find Chris in Hospital 1 anymore, so adds Chris to Hospital 2 and generates the appropriate learning assignment.

## Cancelling a Learning Initiative Versus End Dating It

You can deactivate a learning initiative in Oracle Learning by cancelling it or end dating it.

- Cancelling a learning initiative will withdraw any learning assignments not in a completed status. Completed assignments are ignored.
- End dating a learning initiative stops all initiative-related processing at that point. It doesn't withdraw any assignments, regardless of their status when processing stops.

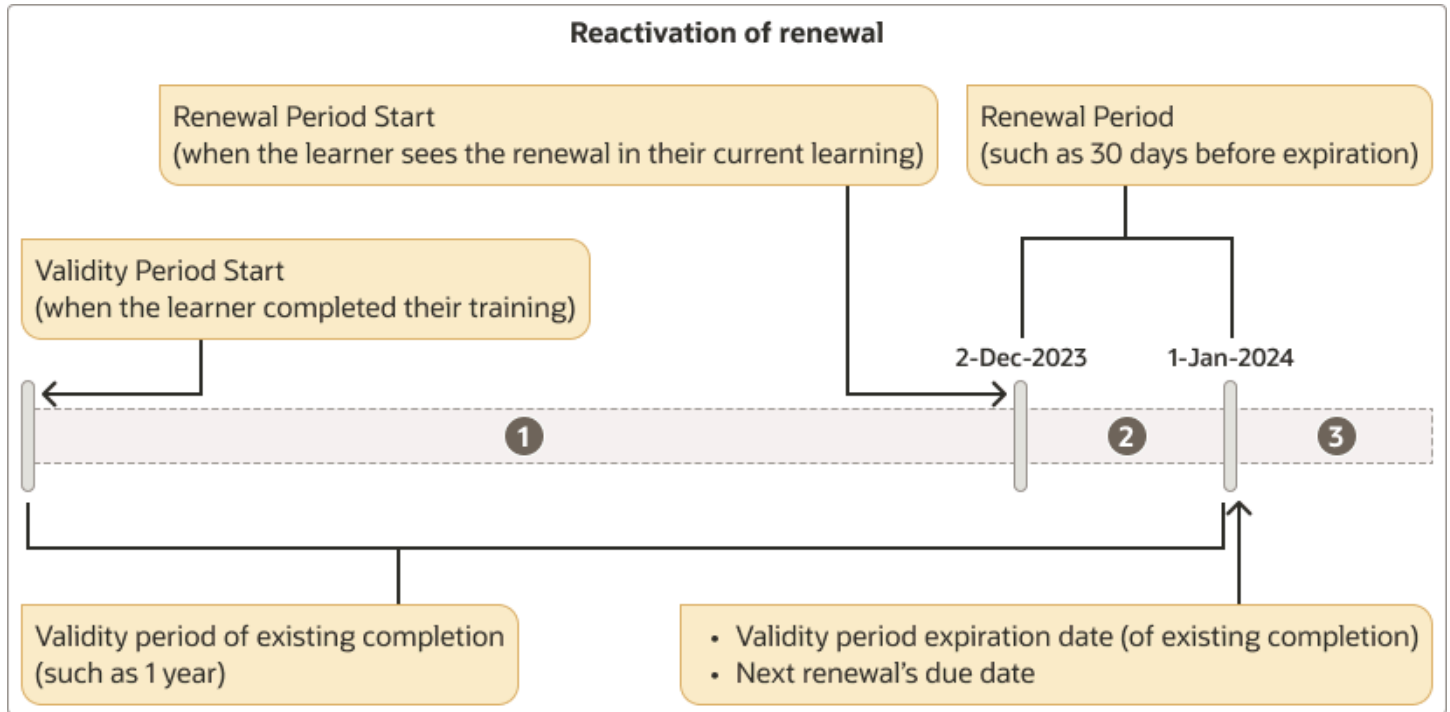
## What Happens When an Oracle Learning Assignment Gets Reactivated

Reconciliation can withdraw the learning assignments for people who no longer meet the initiative learner criteria. If someone later meets the learner criteria again, that learning assignment gets reactivated.

Here's what happens with nonrenewing, first in renewal series, and any successor renewal assignments depending on the reactivation date.

Reactivation Date	Nonrenewing Assignment	Renewing Assignment, First in Series	Renewing Assignment, Not First in Series
Before the original assignment start date	The assignment start and due dates don't change. They're the same as if the learner was never withdrawn.		
On or after the original assignment start date, and on or before the original due date	Update the assigned on date changes to the current date. Update the due date based on the ongoing due date settings.		Update the assigned on date changes to the current date.
After the original assignment due date	Update the assigned on date changes to the current date. Update the due date based on the ongoing due date settings.		

For example, a learner completed on January 1, 2023 learning that's configured for renewal. The 1-year validity period for that completed learning starts on January 1, 2023 and ends on January 1, 2024, as shown here. The 30-day renewal period starts December 2, 2023 and the renewal due date is January 1, 2024.





# 21 Learning Recommendation Administration

## Oracle Learning Recommendations

Recommend a course, offering, or specialization based on what you know about the learners. Learners decide whether to enroll in and complete recommended learning. They can dismiss any recommendations they're not interested in or that they enrolled in.

Assign and manage recommendations using the Learning Recommendations task or the Learner tab of an existing course, offering, or specialization.

**Tip:** After learners complete recommended learning, the recommendations are withdrawn using the Recommended learning item completed (ORA\_AUTO\_WITHD\_ASGMNT\_COMP) reason code. You can use this code in searches and reports to gauge the effectiveness of your recommendations.

### Related Topics

- [Optional Access and Enrollment Overrides for an Oracle Course, Offering, or Specialization](#)
- [Optional Enrollment and Access Overrides for Static and Dynamic Learner Sets in Oracle Learning](#)
- [Default Access and Enrollment for Oracle Learning Catalog Content](#)

## Browse Learning, Recommended View

The Recommended view on a person's **Me > Browse Learning** page shows an image carousel with their five most recently recommended learning items. Various categories, such as Current jobs and Popular with others in my job group their recommendations.

The actual group names vary by implementation. Each category shows up to 20 of the most recent learning recommendations for them.

### Related Topics

- [Process Learning Recommendations](#)
- [Recommend the Most Popular Learning](#)

## Current Jobs Recommendations

Learning recommendations for current jobs come from gaps found between the browser's job role and talent profile. These recommendations appear in the **Me > Browse Learning**, Recommendations view.

For example, a software development director needs to have communication and presentation skills competency at a minimum proficiency level of 3. If someone with that job currently has a communication competency at proficiency

level 2, they've a gap between the current and required competency proficiency level. In this case, Oracle Learning recommends learning items with outcomes that have communication competency at proficiency level 3 or above.

If the person has multiple job roles, the gaps are identified by comparing the required content items defined for each job role and talent profile. These are the content types used to identify any gaps:

- Competency
- Skills
- Language
- Certification
- Membership
- Education
- Honor

#### *Related Topics*

- [Recommend the Most Popular Learning](#)

## Careers of Interest Recommendations

Learning recommendations for careers of interest come from the gaps found between the job roles for the browser's specified careers of interest and their talent profile. These recommendations appear in the **Me > Browse Learning, Recommendations** view.

For example, a software development director's career of interest is Software Development VP. For their director job, they need a minimum Leadership competency proficiency level of 3, which their talent profile shows they have. But the VP job requires a minimum proficiency level for the Leadership competency of 4. There's a gap between their current proficiency and required minimum proficiency level for their career of interest. In this case, Oracle Learning can recommend learning with outcomes that have a Leadership competency proficiency level of 4 or above.

If the person has multiple careers of interest, the gaps are identified by comparing the required content items defined for each job role and talent profile. These are the content types used to identify any gaps:

- Competency
- Skills
- Language
- Certification
- Membership
- Education
- Honor

#### *Related Topics*

- [Recommend the Most Popular Learning](#)



## Manager-Assigned Skills Recommendations

You can automate learning recommendations to help learners attain skills assigned to them by their manager in Skills Center.

For example, a manager assigned one of their workers the Coach Employees core skill in Team Skills Center. Oracle Learning can recommend learning items with that skill defined as a learning outcome. These recommendations appear in the **Me > Browse Learning**, Recommendations view.

The Recommend the Most Popular Learning background process creates or refreshes learner recommendations on a weekly schedule. To keep recommendations relevant, learning that the learner already completed or recommendations they dismissed before aren't recommended again.

### *Related Topics*

- [Learning Outcomes Definition for Oracle Learning](#)
- [Overview of Dynamic Skills](#)
- [Recommend the Most Popular Learning](#)

## Popular with Career Interests

These learning recommendations are based on careers of interest identified by others in the same job or job family as the learner.

These recommendations depend on the quantity of learners in the same job as the worker's careers of interest who voluntarily completed the courses, specializations, videos, or learning journeys in the previous 6 months. For example, Dan's career of interest is Director, Product Management. John's current job is Director, Product Management. The recommendation made to Dan will depend on the learning that John and others in the same job role voluntarily completed in the previous 6 months.

The Popular with career interests recommendations appear in the **Me > Browse Learning**, Recommendations view. The most popular learning appears first. The more learners who voluntarily completed the learning, the more popular the learning. The Recommend the Most Popular Learning background process creates or refreshes the recommendations on a weekly schedule. To keep recommendations relevant, learning that the learner already completed or recommendations they dismissed before aren't recommended again.

### *Related Topics*

- [Recommend the Most Popular Learning](#)

## Popular with Others in Your Job Recommendations

Learning recommendations that are popular with others in your job are decided by how many people in the same job or job family as the browser voluntarily completed the learning in the previous 6 months.

When the job for someone's active work assignment belongs to a job family, their voluntary completion affects that learning's popularity for all jobs in that job family. The more people who voluntarily completed the learning, the closer the learning is to the front of the list.

A voluntary completion by someone with multiple active work assignments affects the popularity of that learning for all the person's jobs. Browsers with multiple active work assignments get recommendations based on each job or job family associated with their work assignments.

These recommendations appear in the **Me > Browse Learning**, Recommendations view. The Recommend the Most Popular Learning background process creates or refreshes learner recommendations on a weekly schedule. To keep recommendations relevant, learning that the browser already completed or recommendations they dismissed before aren't recommended again.

*Related Topics*

- [Recommend the Most Popular Learning](#)

## Recommend Oracle Learning

Recommend a course, offering, or specialization to learners using the Learning Recommendations tasks on the **My Client Groups > Learning** page. Depending on your implementation, you might need to use the Learning Assignments task.

1. On the Learning Recommendations page, click **Create Recommendation**. If you're using the Learning Assignments task, on the Add Learners button menu, select **Recommendation**.
2. On the Recommend Learning page, complete the required and relevant optional fields.
  - o Only learning administrators see the required name and optional description.
  - o Identify which category on the Browse Learning page will show the recommendation. For example, if you want the recommendation to show in learners' Featured view, select **Featured recommendations**.
  - o Optionally complete any enabled learning request descriptive flexfields.
3. Click **Next**.
4. On the Select Learners page, Add menu, select the method to use to identify learners. Or, you can use the Add a Person field.

Add Option	How You Identify Learners
Person	Provide search criteria, such as name, person number, department, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Save</b> .... In the Name field, replace <b>Search by Name copy</b> with a meaningful name.
Person Number List	Provide a list of person numbers. To upload a file, in the Type field select <b>Type</b> . To use a URL, in the Type field select <b>Text</b> .
Analysis Report Criteria	Specify an existing Oracle Transactional Business Intelligence (BI) analysis report that has the criteria to identify the appropriate learners.

Add Option	How You Identify Learners
Learning Assignment Criteria	<p>Provide applicable values for learning assignment attributes, such as the learning name, type, assignment status, or a combination. Also specify whether learners need to match all the criteria or any of it.</p> <p>To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.</p>
Organization Chart Criteria	Search for and select the appropriate chart, such as Chris's Directs or Chris's Org.
Person Criteria	<p>Provide search criteria, such as business unit, legal employer, job family, location, or a combination.</p> <p>To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.</p>

- On the dialog box, search for and select the criteria to find the appropriate learners for the assignment. What you see depends on your Add selection method.

To exclude specific individuals when you add learners using learning assignment or person criteria:

- On the criteria dialog box, click **Advanced**.
- On the Add Fields menu button, select the field you want to use to exclude people, for example, **Person Number**.
- Change the condition for the added field to **Does not equal**.
- Enter the appropriate value.
- Repeat steps b through d for each individual you want to exclude.

To exclude people when you use analysis report criteria, make sure that the report logic includes the exclusion criteria. When you select learners using analysis report and organization chart criteria, you can only search for and select the analysis or chart.

- Click **Submit**.

#### Related Topics

- [Prerequisites Options for Default Learning Enrollment in Oracle Learning](#)
- [Validity, Expiration, and Course Renewal Options](#)
- [Assignment Attribution Type Lookup for Oracle Learning](#)

## Topics Popular in Your Role Recommendations

These learning recommendations are based on topics that are popular with others in the same job or job family as the learner.

The recommendations depend on the quantity of learners in the same job or job family who are members of open topic communities. For example, let's say that Dan's and John's current job is Product Manager. The learning recommendations made to Dan will depend on the topic communities that John and others in the same job role or job family are members of.

The Recommend the Most Popular Learning background process generates up to 15 recommendations per active learner work assignment on a weekly basis. These recommendations appear in the **Me > Browse Learning, Recommendations** view. The topic that has the most recently added learning items appears first. To keep recommendations relevant, learning that the learner already completed or recommendations they dismissed before aren't recommended again.

*Related Topics*

- [Recommend the Most Popular Learning](#)

# 22 Learning Assignment Statuses and Life Cycles

## Proactive Statuses for Oracle Learning Assignments

You can track and control people's learning progress with learning assignment statuses. These are the statuses informally categorized as proactive.

Proactive Assignment Status	Type of Learning Item	Description
Requested	Course Offering Specialization Noncatalog	The requested learning was submitted for approval.
Pending Active	Course	A learning administrator needs to manually activate the learning assignment before the learner can start the learning activities or get added to the waitlist.  This status can also occur when a learner selects more than one offering for a course enrollment because only one offering can be active at a time.
Pending Fulfillment	Course Offering Specialization Noncatalog	A learning administrator needs to add the approved learning to the learning catalog and activate it. If it's already in the catalog, they just need to activate it. Then they need to manually activate the learning assignment.
Waitlisted	Offering	The learner is on the offering waitlist because enrollment is already at capacity.
Pending Seat Acceptance	Offering	The learner can accept or decline an available seat.  <ul style="list-style-type: none"> <li>Accepting a seat also withdraws them from the offering that's already active for the course, if the active offering exists.</li> <li>Declining a seat changes the status to Deleted.</li> </ul> A learning administrator can manually activate or withdraw the learning assignment, or add the learner to the waitlist.

Preactive Assignment Status	Type of Learning Item	Description
		The seat remains blocked until the learner or learning administrator acts, or the offering end date passes.
Pending Prerequisites	Course Offering Specialization	The learner needs to achieve the prerequisites in the period specified in the enrollment access controls. They can get added to the waitlist but can't start any offering activities.

## Active Statuses for Oracle Learning Assignments

You can track and control people's learning progress with learning assignment statuses. These are the statuses informally categorized as active.

Active Assignment Status	Type of Learning Item	Description
No Active Offering	Course	The course learning assignment is active and the learner needs to select an offering to start the learning.
Not Started	Course Offering Specialization	The learner hasn't started any offering or specialization activities for the learning.
In Progress	Course Offering Specialization	The learner has started at least one offering or specialization activity for the learning.
Withdraw Pending Approval	Course Offering Specialization	The learner's withdrawal request was submitted for approval. Withdrawals done by line managers and learning administrators don't require approval.
Pending Required Evaluation	Course Offering	The learner completed the required learning, but hasn't completed the required course offering evaluation.
Complete Pending Approval	Noncatalog	An approver, such as a learning administrator or the person's manager, needs to confirm that the learner completed the required learning.

If the learning includes pricing and payment, the purchase details show payment information when the assignment has one of these statuses.

## Completed and Other Terminal Statuses for Oracle Learning Assignments

You can track and control people's learning progress with learning assignment statuses. These are the statuses informally categorized as terminal.

**Tip:** If the learning includes pricing and payment, the purchase details show payment information when the assignment has one of these two completed statuses.

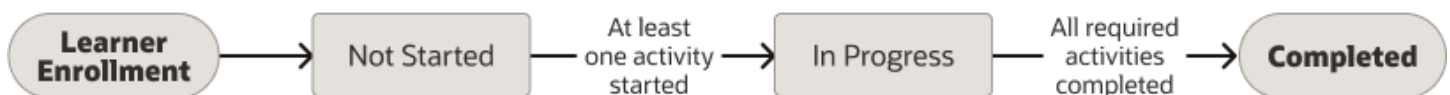
Completed Assignment Status	Type of Learning Item	Description
Completed	Course Offering Specialization	Automatically set after the learner completes all required activities for the specialization or offering.  Completed assignments have completion details. This indicates that Oracle Learning orchestrated the learning activities.
Bypass Completed	Course Specialization Noncatalog	The learning administrator decided that the learner the completed equivalent learning, and thus credits them for completing this assignment. If the configuration allows it, the learner's manager can also mark a course or specialization assignment with this status.  Bypass completed assignments don't have completion details. This indicates that Oracle Learning didn't orchestrate the completion.
Not Passed	Course Offering	The learner didn't meet the completion criteria for an offering activity.  When an activity gets set to Not Passed, the offering status also gets set to Not Passed.  Learners can't attempt any more offering activities. To let learners complete only one of multiple activities, be sure to set the first offering activity to Exempted instead of Not Passed.  See also: <a href="#">How Recorded Attempts Affect Oracle Learning Statuses and Scores</a>

Other Terminal Assignment Status	Type of Learning Item	Description
Completion Request Rejected	Noncatalog	The approver didn't consider the learning complete.
Deleted	Course Offering Specialization	A learning administrator deleted the learning assignment after selecting the option to hide it from the person's learning history.  To permanently purge deleted assignments so that even learning administrators no longer see them, you can use HCM Data Loader.
Request Rejected	Course Offering Specialization Noncatalog	The approver rejected the learning request.
Withdrawn	Course Offering Specialization	The active learning assignment was withdrawn.

## Course Assignment Life Cycle Examples for Oracle Learning

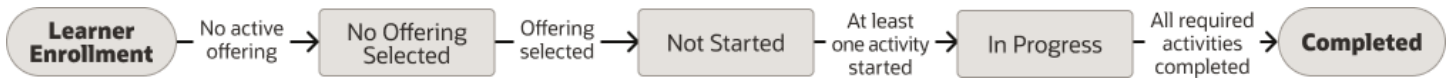
Learning assignments can have simple or more advanced life cycles depending on whether the learning includes enrollment and completion options.

The simplest learning assignment life cycle, shown here, is when a learner enrolls or is enrolled in an offering with no enrollment and completion options. The initial assignment status is Not Started until the learner starts an offering activity. Then the status changes to In Progress, where it remains until the learner completes all the required activities. At that point, the assignment status changes to Completed, and the life cycle ends.

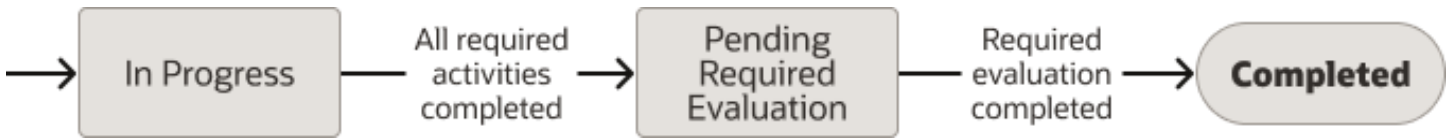


The life cycle is slightly different when a learner enrolls or is enrolled in a course. They need to select an offering before they complete their learning. As shown here, the initial assignment status is No Offering Selected. After the learner selects an offering, the assignment status changes to Not Started and the life cycle progresses as it did for the offering assignment.

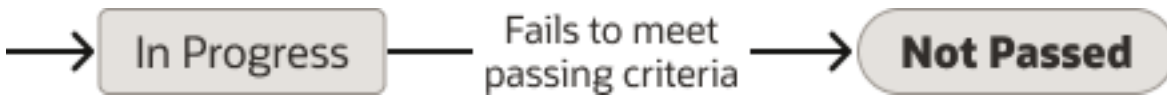




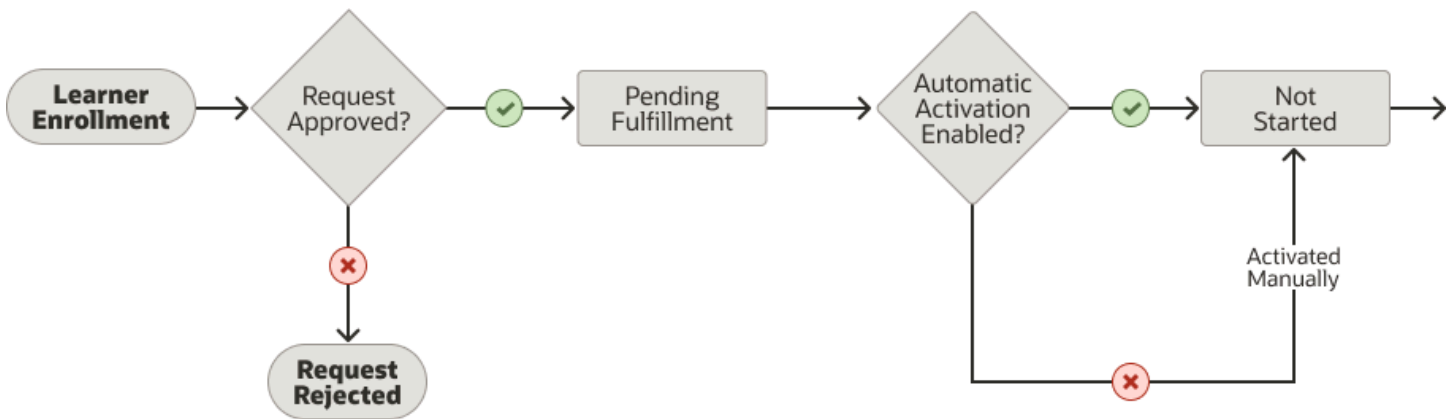
The assignment life cycle expands when the learning includes completion options. Earlier, the assignment statuses moved from In Progress to Completed after the learner completed all required activities. When learning includes completion options, such as requiring an evaluation as shown here, the assignment status moves from In Progress to Pending Required Evaluation. Only after the learner completes the evaluation does the status move to Completed and the life cycle ends.



The end of an assignment life cycle changes for self-paced offering activities with completion options that include passing criteria and a specific number of attempts. If the learner fails to pass an offering activity in the allowed number of attempts, the assignment status moves from In Progress to Not Passed.

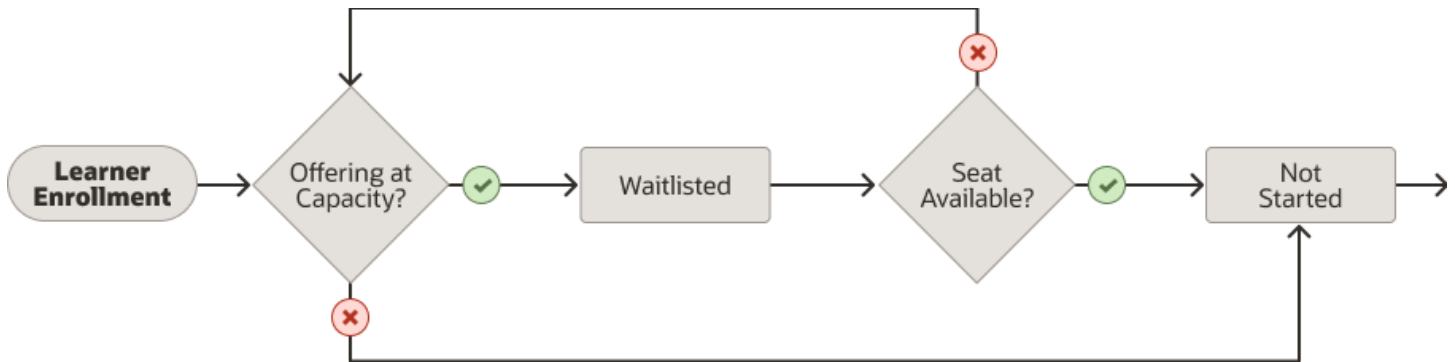


The assignment life cycle expands when the learning includes enrollment options, such as approvals. As shown here, when the learner enrolls or is enrolled in a course offering configured with approvals, the approvers get an enrollment request. If they reject the request, the assignment status changes to Request Rejected and the life cycle ends. If they approve the request, the assignment status changes to Pending Fulfillment. If the request requires manual intervention to activate the assignment, the status changes to Pending Fulfillment. If manual intervention isn't required or when the assignment is manually activated, the assignment status changes to Not started.

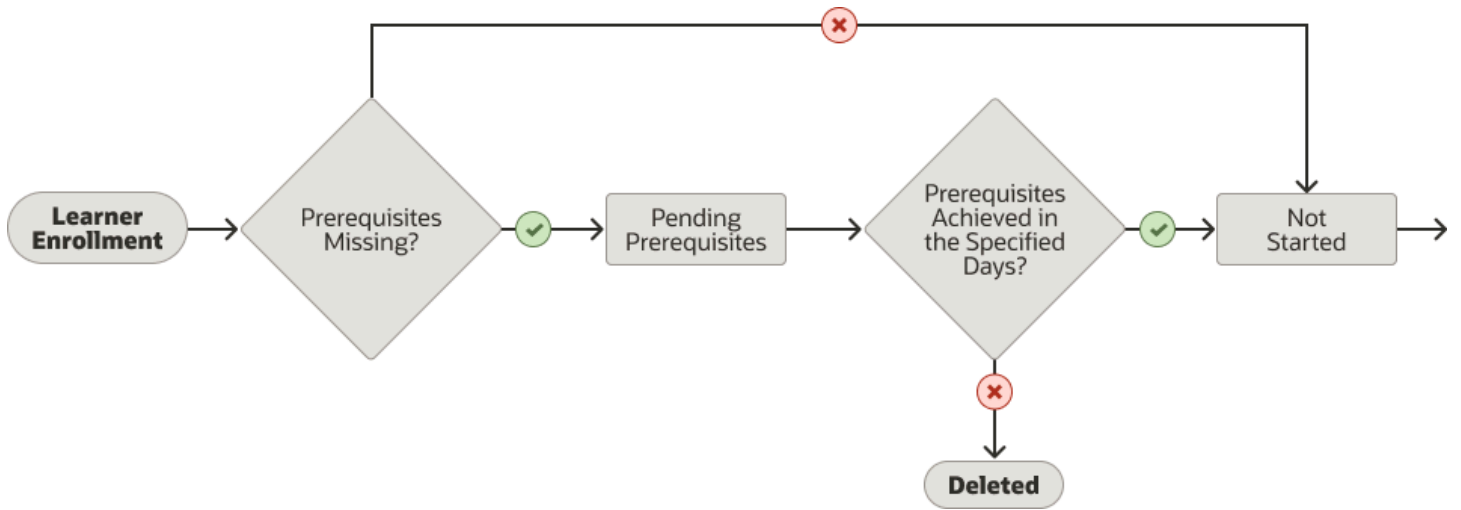


The assignment life cycle changes when the learning includes capacity enrollment options, as shown here. When the learner enrolls or is enrolled in a course offering where enrollment isn't yet at capacity, the assignment status is

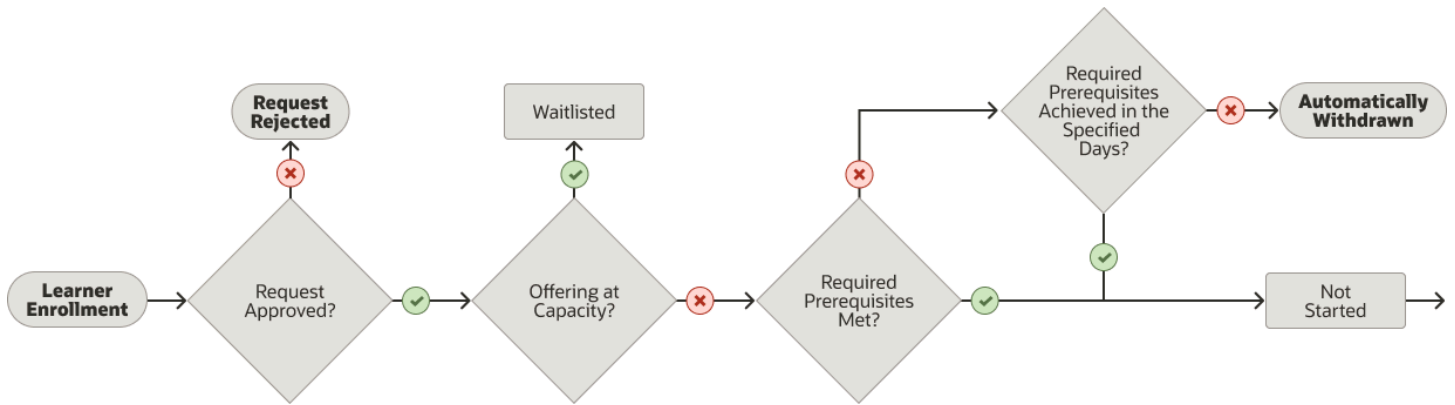
**Not Started.** If enrollment is at capacity, the assignment status changes to Waitlisted where it remains until a seat is available. When a seat is available, the status changes to Not Started.



And the assignment life cycle changes again when the learning includes prerequisite enrollment options, as shown here. When the learner enrolls or is enrolled in a course and they meet the prerequisites, the assignment status is Not Started. If the learner doesn't meet the prerequisites, the assignment status is Pending Prerequisites. If the learner doesn't achieve the prerequisites in the specified period, the assignment status changes to Deleted. If the learner does achieve the prerequisites in the specified period, the assignment status changes to Not Started.



When learning has multiple enrollment options configured, the assignment life cycle handles first approvals, then capacity rules, and finally prerequisites, as shown here.



## Change Status Options for Oracle Learning Assignments

You can change the status of a learning assignment. The available change status actions depend on status of the selected learning assignments.

Option	Description
Activate Assignment	<p>Activate the learning assignment.</p> <p>This action is available for only learning assignments with a Waitlisted or Request Approved status.</p>
Bypass and Approve	<p>Override action that cancels the approval transaction and updates the learning assignment on behalf of the approver. For example, bypass and approve an assignment when the assignment due date is before the approver's return from leave.</p> <p>This action is available for only learning assignments with a Requested, Pending Completion Approval, or Pending Withdraw Approval status.</p>

Option	Description
Bypass and Complete	Set the assignment status to Bypass Completed without the learner completing this assignment. For example, the learner completed equivalent learning as part of a college program and provided their report card as proof.
Withdraw Learners	<p>Withdraw the learning assignment so that it no longer appears in the learner's current learning. The learning assignment does still show in their learning history.</p> <p>This action is available for any learning assignments with preactive and active statuses. It's not available after the learner completes the learning.</p>
Waive Prerequisites	<p>Let the learner skip any prerequisites configured for the learning. This action changes the learning assignment status to Not Started or No Selected Offering, whichever applies.</p> <p>This action is available for only learning assignments with a Pending Prerequisites status.</p>
Delete Assignment	<p>Delete the learning assignment for the learner so that it doesn't appear in their learning history. It continues to appear to learning administrators on the Learning Assignments tabs and pages.</p> <p>To permanently purge deleted assignments so that even learning administrators no longer see them, you can use HCM Data Loader.</p>
Bypass and Reject	<p>Override action that cancels the approval transaction and updates the learning assignment on behalf of the approver. For example, bypass and reject an assignment in Requested status because the approver is away and not responding.</p> <p>This action is available for only learning assignments with a Requested, Pending Completion Approval, or Pending Withdraw Approval status. Assignments with active statuses, such as No Offering Selected, were already approved, so there's nothing to bypass.</p>
Waitlisted	<p>Change the learning assignment status from Not Started or In Progress to Waitlisted and add the learner to the bottom of the waitlist.</p> <p>For changes before the offering start date, the assignment status of the person at the top of the waitlist gets set to Not Started or In Progress, whichever applies.</p>
Undo Complete	<p>Undo the completion for an offering assignment to correct erroneous completions. If you reset all the activities, the offering and corresponding course assignments get set to Not Started. If you reset only some activities, the assignments get set to In Progress.</p> <p>Undoing the offering assignment status always undoes status of the corresponding course assignments. For example, if you change the offering status to Active - In Progress, the course assignment status also changes to In Progress.</p> <p>There are two exceptions to this:</p> <ul style="list-style-type: none"> <li>• The undo doesn't remove any outcomes the learner achieved for a completed course from their talent profiles.</li> <li>• The undo doesn't affect any learning assignment started because the learner achieved a prerequisite by completing the course. For example, the learner completed the Microsoft Word Basics course, thus achieving the prerequisite they needed to start the Intermediate Microsoft Word course. If you undo their completion of Microsoft Word Basics, they can continue with their Intermediate Microsoft Word learning.</li> </ul> <p>The undo doesn't change the Completed status of any specialization assignment that includes the undone course offering.</p>

Option	Description
	<p>If the learning assignment that you're undoing has advanced rules configured, the undo doesn't recalculate the assignment due date. It does nullify and expiration, completion, and validity dates.</p> <p>You can reset the undo completion for an In Progress offering assignment. If you reset the status for all the assignment's activities, the assignment status remains as In Progress for the offering and the course. The progress changes to 0 / N activities completed.</p>
Undo Bypass and Complete	<p>Undo accidental or unwanted Bypass and Complete actions for course and specialization assignments. The course assignment status changes to No Offering Selected. Any corresponding specialization assignment continues to have the active status or Bypass Completed status.</p> <p>When the specialization assignment has no corresponding course assignment, the undo changes the status to Not Started.</p> <p>This action is available on the course or specialization Learning Assignments tab, for only assignments with a Bypass Complete status.</p>

## Reset Offering Activity Statuses for Oracle Learning Assignments and Mark Activities as Completed, Exempted, or Not Passed

You can manually reset all attempts and set the status of offering activities for required and voluntary learning assignment. Use the Manage Activities button, the **More Actions > Edit** activities in a spreadsheet option, or a Mass Action option.

Learners can't attempt any more offering activities after they complete an offering with a status of Not Passed. To let them complete more offerings, you can change the Not Passed status to Exempted.

You can set course completion dates to any date in the past. If you set the completion date before the course creation date, learners always see the most recent version of the course in their learning history. They also see a message that they're viewing the most recent version.

The Manage Activities button is available for only learning items of type Offering. The Reset All Activities button on the Activities dialog box is available only when you can reset at least one activity. The mass action is available on only the Learning Assignments tab of the offering details page. It's not available for the Learning Assignments task.

# 23 Manual Payment Transactions for Offering Assignments

## Internal Chargebacks for Oracle Learning That Incurs Costs

Set up chargebacks to internal departments or business units for people enrolling in learning with associated costs, such as instructor-led training (ILT). Configure pricing and manual payment option defaults for courses and refine them for the related offerings, as appropriate.

When learners enroll in offerings with manual payment configurations, they get a message with the price they need to pay and an applicable refund policy. Learners can see their payment transactions in the Purchase Details section of the offering enrollment details.

Learning administrators process payments and adjust pricing on the Edit Assignment page, Transaction Details tab for an appropriately configured offering. They can also view a complete transaction history.

## Price Locked Transactions for Oracle Learning Assignments

When a learning assignment for an offering with manual payment configured becomes active, it automatically creates a Price Locked transaction. At this point, no one can override the pricing.

These are the ways that learning assignments can become active for offering enrollments that don't require approval:

- A learner enrolls in the offering
- A manager assigns the learning to one or more people in their team
- A learning administrator assigns an offering
- A learning initiative creates a learning assignment for an offering

If the learning requires approvals, after the approvers approve the learning request, the assignment becomes active. Or a learning administrator manually changes the assignment to the appropriate active status.

Access group configurations can include pricing that differs from the offering pricing. When that happens, the access group pricing is the price-locked amount for the learners in the access group.

## Price Adjustment Transactions for Oracle Learning Assignments

When learners withdraw from an offering with manual payment configured, it automatically creates a Price Adjustment transaction with the appropriate negative amount. The payment configuration needs to have refunds enabled, and the withdrawal needs to be within the specified period.

When a learner withdraws, they get a message with the amount from the Price Locked transaction and the applicable refund policy.

When line managers or learning administrators withdraw a learner, it too automatically creates the Price Adjustment transaction. Learning administrators can also edit the learning assignment and manually adjust the price. They can either enter a new amount or specify an adjustment percentage up to, but not exceeding the price-locked amount.

For example, a learner enrolls in an offering with a list price of \$1,000 USD. They qualify for a refund if they withdraw within 10 days of their enrollment. Because the offering has an initial learning record status of active, their enrollment creates a learning assignment with a Not Started status. The learner withdraws 2 days later, and Learning creates a Price Adjustment transaction of -\$1,000 USD.

Learners can see the price adjustment in the Purchase Details section of the offering enrollment details.

## Payment Transactions for Oracle Learning Assignments

After learners complete offerings with manual payment configurations, learning administrators manually create Payment transactions. They create these transactions on the Edit Assignment page, Transaction Details tab, after the transaction history has the Price Locked transaction.

For example, a learner enrolls in an offering, which creates a learning assignment with a Not Started status. After the learner completes the offering, the status updates to Completed. The learning administrator then edits the learning assignment to process payment, which creates the Payment transaction.

Learners can see the payment information in the Purchase Details section of the offering enrollment details.

## Refund Transactions for Oracle Learning Assignments

When learners withdraw from an offering after payment, learning administrators can process refunds. The payment configuration needs to have refunds enabled. The withdrawal needs to be within the specified period. And transaction history needs to have a Payment transaction.

Learning administrators can process a single refund or multiple refunds for an assignment. The total refund amount can't exceed the payment amount. If it does, the refund process automatically creates a positive Price Adjustment transaction to balance the payment and total refund amounts. The balancing equation is:  $\text{Price Lock Amount} + \text{Price Adjustment Amount} = \text{Payment Amount} - \text{Refund Amount}$ .



For example, a learner enrolls in an offering with a list price of \$1,000 USD. They qualify for a refund if they withdraw within 10 days of their enrollment. Because the offering has an initial learning record status of active, their enrollment creates a learning assignment with a Not Started status. A few days later, a learning administrator processes payment, creating a Payment transaction for \$1,000 USD. The learner withdraws 10 days after they enrolled, and Learning creates a Price Adjustment transaction for \$1,000 USD. Then, the learning administrator processes a refund and creates a Refund transaction for \$1,000 USD.

Learners can see all these transactions, including the refund information, in the Purchase Details section of the offering enrollment details.



# 24 Plan for Future Learning Needs

## Plan and Budget for Future Learning in Oracle Learning

You can use learning programs to plan and budget for future learning needs. These programs let you aggregate learning assignments from different parts of the organization, coordinate future learning assignments, and create and monitor associated metrics.

You use a learning program to identify the base program participants. After you create a program, you configure these areas:

1. **Plan:** Where you specify the target budget and target time, and specify general constraints for a specific cycle. Programs need to have at least one plan and can contain an unlimited number of plans.
2. **Plan profile:** Where you set up the rules that decide the training for a type of worker. Plans need to have at least one plan profile can contain an unlimited number of profiles.
3. **Plan record:** Essentially a preassignment attached to a plan, it's how you connect a learner to learning data. You can link it to enrollment realization for easy comparison.
4. **Hourly rate:** Optionally specify the wage cost for a worker attending the learning.

You can also edit the participants you configured when creating the program.

**Note:** To access the Learning Programs task on the **My Client Groups > Learning**, you need the learning program and learning plan aggregate roles and functional privileges.

## Programs in Oracle Learning

Learning programs identify the base program participants for any planning cycle. You can identify the participants year after year using dynamic criteria. And you can sync the participants every day, on demand, or both, and for a specific period.

You can identify the program participants the same way that you identify learners for learning assignments, access groups, and communities:

Add Option	How You Identify Program Participants
Person	Provide search criteria, such as name, person number, department, or a combination.  To reuse this search criteria wherever you select participants, click <b>Save....</b> In the Name field, replace <b>Search by Name copy</b> with a meaningful name.
Person Number List	Provide a list of person numbers. To upload a file, in the Type field select <b>Type</b> . To use a URL, in the Type field select <b>Text</b> .
Analysis Report Criteria	Specify an existing Oracle Transactional Business Intelligence (BI) analysis report that has the criteria to identify the appropriate participants.

Add Option	How You Identify Program Participants
Learning Assignment Criteria	<p>Provide applicable values for learning assignment attributes, such as the learning name, type, assignment status, or a combination. Also specify whether participants need to match all the criteria or any of it.</p> <p>To reuse this search criteria wherever you select participants, click <b>Use Current Criteria</b> and complete the applicable fields.</p>
Organization Chart Criteria	Search for and select the appropriate chart, such as Chris's Directs or Chris's Org.
Person Criteria	<p>Provide search criteria, such as business unit, legal employer, job family, location, or a combination.</p> <p>To reuse this search criteria wherever you select participants, click <b>Use Current Criteria</b> and complete the applicable fields.</p>

You can create several plans for the same participants, and reuse them over time. And you can reevaluate the participants during the Execution phase, or keep it static.

The learning program makes it easy for your to spot participants who don't take part in any of the program plans. You can view the program participants to using different criteria, such as these:

- Include workers removed from the population.
- Include learners from any plan.
- Show learners based on most core HCM core criteria.
- Show all learners in the program.

You can also adjust the learner population, if necessary.

## Program Plans in Oracle Learning

You use learning program plans to set up monetary and time budgets or objectives. You need to create a least one cycle for a plan, and at least one plan a learning program.

The plan start and end dates identify the plan cycle, not the execution period.

Since the learning and wage costs can involve different currents, you need to specify the currency rate type and plan currency. Then the plan can aggregate the disparate currencies for easier monitoring and comparison. And you can allocate hours and budget amounts for reference.

## Program Plan Cycle in Oracle Learning

The main learning planning cycle consists of budgeting, processing, and execution. The Processing phase consists of

1. Budgeting: Create the program, at least one plan, and at least one plan profile.
2. Processing: Assign the appropriate catalog and noncatalog learning to the identified workers or nonexistent workers. You can also gather existing learning requests and add them to the plan cycle.

3. Execution: Process the learning assignments throughout the plan cycle to collect the associated data, such as hours to complete the learning and costs. Plan records and the learning assignments have their own life cycles and you can compare them at any time. Evaluate plan record metrics and update a single or many plan records, as appropriate. Also validate status changes to make sure that learners can access their learning assignments.
  - o You can deliver a plan on a large scale from the program page or Plan tab. And you can deliver it in details from the Plan Records tab of the program.
  - o You can monitor assignments using the Learning Assignments and Learning Initiatives tasks on the **My Client Groups > Learning** page, as appropriate.

## Program Plan Profiles in Oracle Learning

You use learning program plan profiles to set up rules to push learning records to the learners identified in the profile. A profile can create learning assignments or fill existing learning assignments.

Use plan profiles to set basic rules and specify what do with learning assignments and plan records for learners who are no longer eligible for the profile. Also set the default record status and request type, the plan to create plan records for, and the start and completion dates.

You choose between two training types:

- **New:** Push learning that wasn't already requested, you pick the learning item. Metrics are based on the learning cost and duration.
- **Existing:** Add existing learning assignments and requests to the plan. The selection criteria uses assignment, learning item, and person attributes. For example, you add all safety learning that wasn't completed during the previous plan cycle. Metrics are based on the learning item data.

You can identify the profile learners the same way that you identify learners for learning programs, assignments, access groups, and communities:

Add Option	How You Identify Learners
Person	Provide search criteria, such as name, person number, department, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Save....</b> In the Name field, replace <b>Search by Name copy</b> with a meaningful name.
Person Number List	Provide a list of person numbers. To upload a file, in the Type field select <b>Type</b> . To use a URL, in the Type field select <b>Text</b> .
Analysis Report Criteria	Specify an existing Oracle Transactional Business Intelligence (BI) analysis report that has the criteria to identify the appropriate learners.
Learning Assignment Criteria	Provide applicable values for learning assignment attributes, such as the learning name, type, assignment status, or a combination. Also specify whether learners need to match all the criteria or any of it.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.
Organization Chart Criteria	Search for and select the appropriate chart, such as Chris's Directs or Chris's Org.

Add Option	How You Identify Learners
Person Criteria	Provide search criteria, such as business unit, legal employer, job family, location, or a combination.  To reuse this search criteria wherever you select learners, such as when setting access, recommending learning, and setting up community membership, click <b>Use Current Criteria</b> and complete the applicable fields.

You can configure advanced rules to automatically run the plan profile for a specific period or you can run the profiles manually, as needed. And you can do a combination of automatic and manual processing.

## Program Plan Records in Oracle Learning

You can view the plan records generated by the plan profile on the Plan Records tab of the program. Each of these records is associated with a learning assignment.

You can change the costs and wages of many records at once, and process them from draft to final status. You can also change all data for a record by editing just that record.

# 25 Me - Learning

## My Learning Experiences Overview

Manage your organization-related learning using the **Me > Learning** task. You can access learning that you're required to complete to maintain compliance. You can also access other learning you're enrolled in and your learning history.

For example, it's time for you to complete the annual business ethics training, which you can find under required or current learning. And you want to complete the Transform Challenges into Opportunities training you enrolled in last month, which is part of your current learning.

Your learning history shows all the learning you enrolled in or where assigned. Depending on your set up, it might show withdrawn learning enrollments or assignments. All completed learning shows only the completed learning. You don't see, for example, in-progress or withdrawn learning. You can download a .pdf file with your completed and bypass completed learning for a specified date range using the View Transcript action.

To see enrollment and learning details, click a learning card. From the enrollment details page, you can also add ratings and comments about the learning and print a completion certificate. And you can withdraw from the enrollment, recommend the learning, and report the learning, such as for noncompliance.

## When You Complete Refresher Learning Affects Expiration Date Updates on Your Talent Profile

Talent profile content, such as skills, competencies, licenses, and certifications, can be valid for specific periods, then you need to renew them.

When you complete related learning after the current expiration dates, you get a new certificate with the new expiration date. You won't get a new certificate if you complete the related learning before the current expiration dates.

For example, your CPR certification expires May 31, 2022. If you complete the refresher learning before that date, you won't get a new certificate because your current certificate hasn't expired. If you complete the refresher learning after that date, such as on June 1, 2022, you get a new certificate with the new expiration date.

So before you take refresher courses or specializations that renew talent content that you already have on your talent profile, check your profile. Make sure you take the refresher after the related content expires.

## Search and Browse the Learning Catalog

You can search the Oracle Learning catalog for specific learning, such as by title or learning outcome. Or browse the catalog to see what learning catches your interest, such as featured or recommended learning, or by learning categories.

To see the learning details and enroll in the learning, click a learning card. To see rating details and review comments for a learning item, click the review count. You can also participate in available conversations.

**Note:** To enroll in a course, on the enrollment details page Actions menu, select **Enroll in Course**. Clicking **Enroll** under the course name expands the Available Offerings section, where you can review the offerings that are a part of the course

## Featured View

The image carousel shows the five most recently featured items that you can access. And five categories group the featured learning by learning type, such as courses and specializations. Each category shows up to 25 of the most recently featured learning that you can access, with the most recently featured learning appearing first.

## Recommended View

The image carousel shows the five most recently recommended learning items. And various categories group your recommendations, such as Recommended for my current role and Popular with others in my job. The actual group names vary by implementation. Each category shows up to 25 of the most recent learning recommendations for you.

## Category Views

The category views show the topics and learning in the category, such as Cloud, Software Development, Creative, Business, and Finance. Learning administrators decide the actual category names in the learning catalog.

The image carousel shows the five most recently featured items in the category. Each featured topic includes the topic cover art, title, and description. Each view row is a topic community that's part of the category, which you can follow and unfollow. And each topic community shows up to 25 learning items that are part of the topic.

## Record External Learning

Get credit for learning you completed outside of what your company offers.

For example, your manager tells you to record the 1-day leadership seminar you recently attended. Use the Record External Learning action on the My Learning Experiences page.

When you request noncatalog learning experiences, you can attach relevant documents, such as completion certifications and report cards.

## Request Noncatalog Learning

You can ask your learning department to add learning to the catalog that's not already part of it. For example, there's new technology training that you think would be good for people in your job. Use the Request Noncatalog Learning action on the My Learning Experiences page.



After you submit your request, you can see the noncatalog learning on that same page with a status of Requested. After your request is approved, you get an informational notification and the learning status changes to Pending Fulfillment. You can edit or withdraw the request any time before it's fulfilled.

When the learning department decides it's relevant, they create the requested learning, add it to the learning catalog, and assign you the learning. On your My Learning Experiences page, the assignment status moves from Pending Fulfillment to Active Not Started. You can now start the learning. After you finish the learning, it's marked Completed.

## Withdraw from Learning Enrollments or Assignments

You can withdraw from learning you enrolled in or voluntary learning assignments (assignments with no due date) using the enrollment details page Actions menu. And your manager can withdraw you from any required learning that they assigned you.

You can withdraw, or get withdrawn from learning with these statuses:

- Not Started
- Active
- Content Complete
- In Progress

You can't withdraw, or get withdrawn from learning with any other status.

You and your manager can't withdraw you from required enrollments assigned by a learning administrator. And you can't withdraw from learning with the No Offerings Selected status. But your learning administrator can help you withdraw.

## My Learning Communities

You can access the learning communities that you're a member of and track communities that you manage, using the My Learning Experiences page. Also create and manage self-service communities, including the catalog and related learning and materials.

You can leave a community at any time using the Actions menu on the community page.

### *Related Topics*

- [Oracle Learning Communities](#)
- [Official and Self-Service Communities in Oracle Learning](#)
- [What Happens When You Change the Privacy Setting for an Oracle Learning Community](#)
- [The Difference Between Removing and Deleting Items from the Oracle Learning Community Catalog](#)
- [Oracle Learning Community Membership and Managers](#)

## Shared Learning

Depending on your company's policies, you can author or publish videos and learning journeys for the learning catalog. Use the page-level actions on the My Learning Experiences page. On the Learning page, use the My Shared Learning task.

To view your authored or published items, or drafts of unpublished items, on the My Learning Experiences page, use the Actions menu. On the Learning page, use the My Shared Learning task.

## My Learning on a Mobile Device

Continue your active learning enrollments on your mobile device regardless of whether you're online or offline. Also track your required, voluntary, and recommended learning items. Install and use the Oracle HCM app.

Oracle HCM automatically downloads your active learning items when you're online. Then you can continue your learning even when you're offline. The next time you're online, the mobile app syncs your progress to the server. To download content only through WiFi and set the maximum download size, use the **Settings** menu.

Here's what you can from the My Learning page on your mobile device.

- **Required tab:** You can view your learning summary and the number of overdue and completed learning items. The required learning item cards with an **Overdue** status appear first, then the cards with a **Completed** status.
- **Voluntary tab:** View the cards for your voluntary learning items. For example, you can see the total or remaining duration of each item.
- **Recommended tab:** View the learning items that others recommended to you. For example, you can see the person who recommended the learning and the total or remaining duration of each item.

The **Play**, **Play Again**, or **Resume** buttons on the Required, Voluntary, and Recommend tabs appear according to your progress on active learning items. You can't complete any waitlisted, requested, or inactive learning items while offline.

**Tip:** Sync often as you work through learning items so that the server has your most recent progress. You don't want Oracle HCM to be the sole source of that information.

### Related Topics

- [Configure the Oracle HCM Cloud Mobile App](#)
- [Oracle HCM Cloud Mobile App](#)

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## Track Completion of Team Learning

You can track your team's required and voluntary learning enrollments by learner or learning item. And you can filter results, for example, by enrollment status, enrollment type, and due date.

You can also view learning item details, for example, to see the learning outcomes related learning, and available offerings. Based on permissions, you can create saved searches and share them with specific people or everyone accessing Team Learning.

Your team consists of your subordinates in the line manager hierarchy or other manager types associated with you. By default, your Team Learning page shows your direct reports. You can switch to a subordinate manager to see the learning information for their direct reports.

Use the **My Team > Learning** page.

## My Team Learning Actions

Help your team stay compliant and current with important skills, tools, and competencies by assigning relevant learning, including communities and course offerings. Also request noncatalog learning and record external learning for them. And publish videos and author learning journeys.

When you assign learning, you can make it required or voluntary. Depending on your team learning configuration, you can assign required or voluntary learning using the page-level actions. Or you open the course details. Then in the Available Offerings section, click **View Details**. The offering details page Actions menu includes the Assign Learning to My Team option.

Ask your Learning department to add learning that's important for your team but not available in the learning catalog using the Request Noncatalog Learning action. Get credit for learning your team members completed outside of the learning catalog using the Record External Learning action., And share relevant knowledge and experience with your team using the Publish Video and Author Learning Journey actions. All these actions are available in the **My Team > Learning** page header.

You can also download a .pdf file with a learner's completed and bypass completed learning for a specified date range using the View Transcript action.

