

Oracle Fusion Talent Management

**Manage Oracle Learning
assignments and recommendations**



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1 Introduction

About Oracle Learning assignments and recommendations

Oracle Learning assignments and recommendations help organizations distribute learning, guide learner development, and support ongoing compliance and growth.

Assignments typically support required or directed learning with lifecycle behavior tied to activation, completion, renewal, reassignment, and reporting. Recommendations guide learners toward relevant learning based on roles, skills, interests, activity, and organizational context.

Both assignments and recommendations use shared audience infrastructure, background processing, and learner-distribution behavior. Learning specialists can manage audiences using individuals, hierarchies, user groups, analysis reports, and other criteria.

Together, assignments and recommendations support both organizational learning requirements and learner-driven development experiences.

2 Audience Management

Overview of audience management

Identify learning assignment and recommendation recipients in Oracle Learning. The same audience can support one-time learning distribution, recurring assignment automation, and ongoing recommendation guidance.

You can identify audiences using:

- individual people
- uploaded person number and work email lists
- filtered lists based on worker assignment and learning assignment criteria
- manager hierarchies
- user groups
- analysis reports

Some of these methods remain unchanged except when someone manually updates them, while others automatically update over time. Before selecting an audience approach, consider:

- how often the learner population changes
- whether membership should update automatically
- how much operational maintenance the audience requires
- whether assignments or recommendations should continue adapting as workers move through the organization

Create learning audiences using Ask Oracle

Use natural language and workforce data.

Here's what to do

- Go to **My Client Groups > Learning and Development > Learning Audience Criteria**.
- Create the audience criteria using Ask Oracle.
- Describe the audience in natural language.
- Review available worker attributes and sample criteria.
- Preview matching workers.
- Review exact and similar existing audiences to avoid duplication. These matches include only active learning audiences that you can access. Similar matches show up to 10 results.
- Review and approve the generated criteria to create the learning audience.

Create learning audience analysis reports

Use Oracle Transactional Business Intelligence (OTBI) analyses when you need advanced criteria that aren't available through other audience options. Analysis reports can identify learners using worker details, organizational structure, assignment information, learning history, and other Oracle Learning attributes.

1. For learning audiences to process correctly, the analysis needs to include the PersonID attribute.
1. 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**. Also make sure that all the folders in the path are accessible to learning specialists, and that the specialists have access to run the reports.

For details, see *Securing HCM* and *Security Reference for HCM*.

2. Go to **Tools > Reports and Analytics > Browse Catalog**.
3. On the Catalog page, create an analysis.
4. On the Select Subject Area dialog box, search for and select **Workforce Management - Worker Assignment Real-Time**.

The analysis needs to be created using a subject area. Any analyses created using Create Analysis from Simple Logical SQL aren't supported.

5. On the Untitled page, build and save your analysis.

For example:

- a. Expand the **Worker** folder.
- b. Add these attributes to the Selected Columns section:
 - PersonID (you need to 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. Add the **Department Name** attribute to the Selected Columns section.
- e. Next to Department Name, select the icon, and select **Filter**.
- f. On the New Filter dialog box, in the Value field, search for and select the department to filter for, such as Sales.
- g. Select **OK**.
- h. On the Results tab, save the analysis to the folder specified in the WLF_RBA_BI_FOLDER profile.

Create learning audience user groups

User groups define reusable learner populations for assignments, recommendations, communities, and other Oracle Learning processes. They can combine multiple audience-identification methods into a reusable learner population, helping to reduce duplication and keep audience behavior more consistent across learning processes.

1. Go to **My Client Groups > Learning and Development > User Groups**.

2. Create a user group and complete the relevant fields.
3. Add the people who can manage the user group.
4. Add the selection rule for the user group participants.

3 Assignments

Learning assignment lifecycle

Learning assignments move through a lifecycle that begins when Oracle Learning identifies a learner audience and continues through assignment creation, learner participation, and eventual completion, withdrawal, expiration, or reassignment.

Origin

Assignments can originate from:

- learning assignment profiles
- manager actions
- learner requests
- noncatalog learning requests
- recommendations
- automated audience processing

Lifecycle

Most assignments follow this general lifecycle:

1. Audience identified
2. Assignment created
3. Assignment activated
4. Learner engages with learning
5. Assignment status changes over time
6. Assignment reaches a terminal status
7. Optional renewal or reassignment cycle

Assignment behavior varies based on learning configuration, approvals, prerequisites, learner activity, and reassignment processing. For example, some assignments activate immediately, while others wait for prerequisite completion, enrollment approval, or manual activation.

Assignment creation and activation

Assignments can be required or voluntary.

- Required assignments include completion expectations and due dates.
- Voluntary assignments let learners complete the learning at their own pace.

Some assignments activate immediately after creation. Others can remain in preactive states until:

- learners complete prerequisites
- enrollment approval workflows complete

- learning specialists manually activate the assignments
- recurring processing adds the learners to the assignment audience

Managers and learning specialists can also create assignments directly for learners.

Assignment progress and status changes

As learners interact with learning, assignment statuses change over time based on learner activity, assignment configuration, approvals, prerequisites, reassignment rules, and administrator actions.

Operational changes can also affect existing assignments and learner progress. For example, replacing self-paced content or changing learning structure can affect existing assignments depending on how reconciliation and reassignment processing is configured.

Assignment renewal and reassignment

Some assignments support recurring completion cycles, for example:

- compliance learning might require annual renewal
- certifications can expire after a defined period

Reassignment conflict rules define how Oracle Learning handles conflicts between existing and new assignments so organizations maintain ongoing compliance and development requirements.

Create and manage learning assignments

Use learning assignment profiles to generate one-time or continuous learning assignments for the specified audiences. You can also record catalog completions, record external learning, manage noncatalog requests, and set initial assignment status to Pending fulfillment.

Assignment details can include enrollment information, learner and questionnaire responses, descriptive flexfields, and assignment-related materials. Assignment-level related materials are managed independently of assignment profile related materials.

Operational hub for these activities is **My Client Groups > Learning and Development > Learning Assignment Profiles**.

Create learning assignment profiles

The profile defines the learning, audience, dates, and rules used to create the one-time or recurring learning assignments. The assignments can be:

- required, with completion expectations and due dates
- voluntary, where learners complete the learning at their own pace

Start dates can be in the past, present, or future.

You can identify assignment audiences using:

- individuals

- uploaded person number or work email lists
- filtered lists of worker assignment or learning assignment criteria
- manager hierarchies
- user groups
- analysis reports

Keep in mind whether the assignment profile should create assignments one time or continue reevaluating audience membership over time.

Tip: You can also assign learning from the Learning Assignments page or learning details Assignments tab. Use the Assign Learning button to create an assignment profile that will generate the individual learning assignments.

Record catalog learning completions

Record event, self-paced learning, and specialization completions directly from the Learning Catalog page.

1. Go to **My Client Groups > Learning and Development > Learning Catalog**.
2. In the appropriate learning row, select **Actions > Record Completion**.
3. Complete the relevant fields.
4. Submit the completion.

Record external learning

Record learning completed outside Oracle Learning, such as workshops, conferences, and certifications, so it appears in learner history.

1. On the Learning Assignment Profiles page, select **More Actions > Record External Learning**.
2. Complete the relevant fields.
3. Submit the record.

Request noncatalog learning

Request learning that isn't available in the Oracle Learning catalog.

1. On the Learning Assignment Profiles page, select **More Actions > Request Noncatalog Learning**.
2. Complete the relevant fields.
3. Submit the request.

Link catalog learning to approved noncatalog requests

After the requested learning is added to the Oracle Learning catalog, link the catalog learning to approved noncatalog requests.

1. On the Learning Assignment Profiles page, search for and select the approved noncatalog learning request.
2. Link the catalog learning.

The linked requests update from Pending Fulfillment to active catalog learning assignments so learners can begin the learning.

Manage learning assignments with Learning Assignments Assistant

Use natural language to update multiple learner assignments for all learning types. Review the suggested changes before approving them to help improve accuracy and reduce manual effort.

Depending on your implementation, use the Update Assignments button from one or more of these pages:

- Learning definition, Assignments tab
- Learning assignment

Here are some examples of when and how to use the assistant:

Use Case	Sample instruction
Withdraw all learners from a course using the course's item number.	Withdraw all learners from item number OLC331562 with reason learning is no longer relevant to learner
Mark all activities complete for an offering for specific learners identifying the learners by their full name using the offering's item number.	Update John Smith, Janice Henry, Janice Smith to a status of completed for item number OLC332014 with reason Specialist marked complete
Mark specific activities complete for an offering using the offering item number and specific activity numbers for the activity. Identify the learners by email, person number (such as P10029) and full name.	Update Jane Smith, john@email.com, P10029, Kerry Smith as completed for item number OLC1299, activity number OLC1099, activity number OLC12399 with reason specialist marked complete
Undo completion for several assignments for a self-paced learning using the assignment number as the identifier.	Undo complete for assignment OLC1122, OLC2333, OLC1111 with reason undo completed by the specialist
Mark assignments completed for a learner, course, learning path, event and self-paced learning and provide a comment using the assignment number to identify what to update as completed.	Mark assignment number OLC111, OLC222, OLC333, OLC444 as completed with reason completed offline and status verified and comment "learner completed elsewhere"
Mark all event activities complete except the evaluation complete using the event item number and identifying the learners using their full name and don't update the evaluation to completed. (evaluation/feedback activity is never included unless the activity number is provided for the evaluation/feedback or it's explicitly mentioned)	Update all activities except the evaluation complete for item number OLC1299 complete for Jane Smith, Mike Smith, Bob Smith with reason specialist marked complete Update all activities complete for item number OLC1299 complete for Jane Smith, Mike Smith, Bob Smith with reason specialist marked complete
Mark all event activities complete including the evaluation by including the event item number and the learner's full names.	Update all activities including the evaluation complete for item number OLC1299 complete for Jane Smith, Mike Smith, Bob Smith with reason specialist marked complete

Learning assignment statuses

Track learning progress using learning assignment statuses. Assignment statuses help you monitor learner progress, understand assignment lifecycle stages, and manage assignment status changes.

Preactive

Preactive Status	Learning Type	Description
Requested	Course Event Offering Self-paced Noncatalog	The requested learning was submitted for approval.
Pending Fulfillment	Course Event Offering Self-paced Noncatalog	A learning specialist 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	Event Offering	The learner is on the offering waitlist because enrollment is already at capacity.
Pending Seat Acceptance	Event Offering	The learner can accept or decline an available seat. Declining a seat changes the status to Deleted. A learning specialist can manually activate or withdraw the learning assignment, or add the learner to the waitlist. The seat remains blocked until the learner or learning specialists acts, or the event end date passes.
Pending Prerequisites	Course Event Offering Self-paced	The learner needs to achieve the prerequisites in the specified period. They can get added to the waitlist, but can't start the learning.

Active

Active Status	Learning Type	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 Event Offering Self-paced	The learner hasn't started the learning.
In Progress	Course Event Offering Self-paced	The learner has started the learning.
Withdraw Pending Approval	Course Event Offering Self-paced	The learner's withdrawal request was submitted for approval. Withdrawals handled by line managers and learning specialists don't require approval.
Pending Required Feedback	Course Event Offering Self-paced	The learner completed the required learning, but hasn't completed the required evaluation.
Complete Pending Approval	Noncatalog	An approver, such as a learning specialist or the learner's manager, needs to confirm that the learner completed the required learning.

Completed and failed

Completed Status	Learning Type	Description
Completed	Course Event Offering Self-paced	Automatically set after the learner completes the learning. Completed assignments include completion details when Oracle Learning tracked and managed the learning.

Completed Status	Learning Type	Description
Bypass Completed	Course Event Offering Self-paced Noncatalog	The learning specialist decided that the learner completed equivalent learning and so credits them for completing this assignment. If the configuration allows it, the learner's manager can also mark the learning with this status. Bypass completed assignments don't include completion details because Oracle Learning didn't manage the completion.
Not Passed	Course Event Offering Self-paced	The learner didn't meet the completion criteria for the learning in the specified number of attempts, if any.

Other terminal

Other Terminal Status	Learning Type	Description
Completion Request Rejected	Noncatalog	The approver didn't consider the learning complete.
Deleted	Course Event Offering Self-paced	A learning specialist deleted the learning assignment after selecting the option to hide it from the learner's learning history. To permanently purge deleted assignments so that even learning specialists no longer see them, you can use HCM Data Loader.
Exempted	Self-paced	Set for the learning assignment created because the audience processing option says to exempt learners who already completed the learning. The assignment remains in this status indefinitely.
Request Rejected	Course Event Offering Self-paced Noncatalog	The approver rejected the learning request.
Withdrawn	Course Event Offering Self-paced	The active learning assignment was withdrawn.

Reporting and APIs

You can include assignment statuses and substatuses in Oracle Transaction Business Intelligence (BI) reports and REST APIs.

Manage assignment status changes

Available assignment actions depend on the current assignment status, learning type, capacity management, and your security privileges. For example:

- You can offer or grant waitlisted learners seats for capacity-enabled events and instructor-led offerings.
- You can withdraw completed assignments or delete assignments in supported terminal statuses if you have the necessary privileges.

View and print a learner's learning history

View learner transcripts and assignment history to track learning progress, completions, statuses, and past learning activity.

1. Go to **My Client Groups > Learning and Development > Learning Assignments**.
2. Search for the learner and select the learner.
3. Review the learner's assignment and completion history.
4. Optional: download a .pdf file with a learner's completed and bypass completed learning for a specified date range. You can also print this file.

Assign learning checklist tasks to learners and managers

Create learning-related journey checklist tasks for learners and managers. For example, remind learners, managers, or both to record external learning or request noncatalog learning.

Build *HCM journey checklists* that include the appropriate learning self-service *application task*. Your checklist templates need to use these values:

Field	Worker Value	Manager Value
Checklist Category	Learn	Learn
Performer	Worker	Line Manager
Task Type	Application Task	Application Task
Application Task	Request Noncatalog Learning or	Assign Learning to My Team or

Field	Worker Value	Manager Value
	Record External Learning	Record External Learning for My Team or Request Noncatalog Learning for My Team

How Oracle Learning handles multiple work relations and work assignments

Workers can have multiple work relations, multiple work assignments, or both. These employment structures affect learning assignment, assignment display, and manager experiences. But learning is always assigned to the worker rather than to individual work assignments.

Learning specialists can assign learning to workers based on any active work assignment.

- If a worker is eligible based on a nonprimary work assignment, they're assigned the learning.
- If a worker is eligible based on multiple work assignments, they're assigned the learning only once.

The work assignment information displayed for the learning assignment always comes from the primary work assignment, even if the worker is eligible because of nonprimary work assignment information.

Managers typically find workers by using person search or the organizational hierarchy.

- Person search typically returns workers based on the primary work relation or work assignment and uses that line manager when evaluating access permissions. Managers who aren't the line manager for the primary work relation or work assignment won't find the worker in the search results.
- Organizational hierarchy searches, such as All Direct Reports, can include workers who report to the manager through nonprimary work relations or work assignments.

After managers find a worker, they see the worker's learning assignments as worker-level information rather than work-assignment-specific information. Managers with permission to view the worker can see those learning assignments. The learning assignment always shows the primary work relation and primary work assignment, even when the learning was assigned because of a nonprimary work relation or work assignment.

4 Recommendations

Learning recommendations lifecycle and delivered recommendations

Learning recommendations help learners discover relevant learning based on their roles, interests, skills, learning activity, and organizational context. Learning specialists create recommendation profiles, and the Recommend Learning background process refreshes recommendations as learner activity, talent profiles, and recommendation criteria change.

Most recommendations follow this general lifecycle:

1. Learning specialists create and manage recommendation profiles by selecting a profile type that specifies how to create the recommendations. Each profile type provides a different set of recommendation options.

Task: My Client Groups > Learning and Development > Recommendation Profiles.

2. The Recommend Learning background process uses the profiles to generate or refresh recommendations.
3. Learners review, dismiss, or complete recommended learning.

Recommendations are grouped into categories that help learners discover relevant learning more easily. For example, Oracle Learning delivers recommendations for these categories:

Category	Description
Popular in current role	Based on voluntary learning completed by people in the same job or job family during the past six months. Learners with multiple active assignments get recommendations related to each role or job family.
Recommendations for current job	Based on gaps between learner job requirements and their talent profile, including competencies, skills, certifications, education, memberships, languages, and honors. Learners with multiple jobs get recommendations related to each role.
Recommendations for current role gaps	Based on gaps between a learner's current role and the associated position profile. The recommendations are designed to help close those gaps.
Recommendations based on your careers of interest gaps	Based on gaps between careers of interest and the learner's talent profile. The recommendations help learners prepare for future roles and career goals.
Recommendations for your manager-assigned skills	Based on skills assigned by managers in Skills Center. Recommended learning has matching learning outcomes.
Recommendations for skills I'm developing	Based on the skills a learner adds to the Skills I'm developing section of their skills center.
Trending in current role	Based on voluntary learning completed in the last week by others in their role, their careers of interest, and with their managers and peers.

To share a direct link to this part of the learning catalog with learners, use this format: `<Your Instance URL>/fscmUI/redwood/learner/learn/browse-learning-items?selectedTab=recommended`

When learners complete a recommended course, the associated recommendation is removed automatically with the ORA_AUTO_WITHD_ASGMNT_COMP reason code. You can track the effectiveness of your recommendations by using this code in reports and searches.

Completed learning and dismissed recommendations aren't recommended again.