synergy codeworks

The Unofficial Guide to
Oracle® Learning Management

for Learners, Managers, and Instructors

Written by Synergy Codeworks

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The Unofficial Guide to Oracle® Learning Management for Learners, Managers, and Instructors

Specific to Version 12.2

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Table of Contents

Tips for Navigating this User Guide

This user guide is separated out by role and provides details for Learners, Managers, and Instructors. There are several formatting conventions used to help you. The following icons denote best practice recommendations, pitfalls to avoid, technical explanations, and key questions to ask yourself when using Oracle Learning Management:
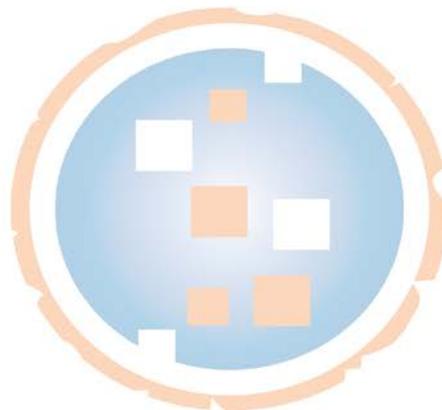
Tips and best- practice recommendations

Pitfalls to avoid

Technical details

Welcome to Oracle Learning Management

Provide a Single Source of Training Truth for Your Organization

Oracle Learning Management (OLM) provides you with the ability to manage all aspects of your training in a single location. Because OLM integrates seamlessly with your existing Oracle Human Resources system, your personnel and assignment information is updated in real time, immediately giving you access to the training you need.

Here are some of the features available in Oracle Learning Management that will be expanded upon in this in-depth user guide:

- Manage your enrollments and subscriptions;
- Create and subscribe to Learning Paths to track your long-term learning goals;
- Get certified (once or on a recurring basis);
- Achieve competencies based on successful completion of a Course, Learning Path, or Learning Certification;

- Find training based on your current job or future goals;
- Participate in online Discussion Forums and Chats;
- View learning history for your direct reports;
- Update enrollment information for Learners that are attending a Class that you're scheduled to teach.

Employees

- Allow self-enrollment in Classes;
- Consume training materials in a variety of formats;
- Maintain a detailed record of all training-related activities.

Managers

- Manage training for direct reports;
- Require approvals to maintain control over schedules and costs;
- Create customized Learning Paths for individual employees.

Trainers

- Keep track of schedule for up-coming Classes;
- Update attendance information;
- Collaborate with students through online forums and chats.

Administrators

- Track completion and renewal information for compliance training;
- Manage enrollments and waitlists;
- Keep all training-related information in one place.

Understanding Key Learning Management Definitions

Catalog – The Oracle Learning Management *Catalog* is a nested, hierarchical structure used to administer your organization's training in a systematic fashion. It's essentially the heart and soul of Oracle Learning Management, and is built using the following objects: *Categories*, *Courses*, *Learning Paths*, *Learning Certifications*, *Offerings*, *Classes*, and *Sessions*.

Category – Similar to folders on your computer or network, *Categories* are used to organize the Learning Management Catalog into logical sections. *Categories* can contain Courses, Learning Paths, Learning Certifications, Forums, and Chats.

Course – A *Course* defines the subject matter and organizational objectives for the training that you are delivering to your Learners. It is <u>what</u> you are teaching.

Offering – An *Offering* defines the *Delivery Mode* and language of a *Course*. Examples include instructor-led training, online self-paced training, live webinar, or offline self-study. It is <u>how</u> you are teaching the material to your Learners. A *Course* can have multiple Offerings.

In Oracle Learning Management, a *Delivery Mode* is a way of serving training to Learners using a method that is either online or offline and synchronous (scheduled) or asynchronous (self-paced):

> **Offline Synchronous:** This type of *Delivery Mode* occurs outside of the system and is scheduled to happen at a specific time and in a specific place. An example would be an instructor-led training held in Dover, New Hampshire.

> **Offline Asynchronous:** This type of *Delivery Mode* occurs outside of the system and happens at the Learner's own pace. An example would be a physical book that the Learner reads offline.

> **Online Synchronous:** This type of *Delivery Mode* is launched directly from the system and is scheduled to occur at a specific time. An example would be an instructor-led, live Webinar. The play button on the Learner Home page is only illuminated during the specific date and time allocated for the Class.

> **Online Asynchronous:** This type of *Delivery Mode* is launched directly from the system is launched at the Learner's own pace. An example would be an Oracle User Productivity Kit E-Learning topic, or a recording of a live webinar given previously.

Classes – A *Class* is an instance of an *Offering* that your Learner actually enrolls into. As an example, it is a specific date, time, and location for a *Course* that is being delivered through an instructor-led *Offering*. It is also the *Catalog* object that your Learner chooses to enroll in for an online, self-paced e-learning *Offering*. For a Learner to consume training content in Oracle Learning Management there must be a *Course*, *Offering*, and *Class*. Classes define the <u>where</u> and <u>when</u> of your training.

Sessions – A *Session* is a detailed agenda item or subdivision for a *Class*. It is most often used to separate resource bookings and scheduling. It is not required to have a *Session* for a *Class*.

Forum – A *Forum* is an online bulletin board that facilitates discussions between Learners and Instructors. Forums can exist at the *Category* level and be open to anyone that is given access to it, or Forums can be set up at the *Class* level and only be accessible to Learners that are enrolled in the *Class*.

Chat – A *Chat* is a scheduled, live discussion that allows Learners and Instructors to collaborate in real time using plain text. Just like *Forums*, *Chats* can exist at the *Category* level or the *Class* level.

Learning Path – A *Learning Path* is a collection of *Courses* that satisfies a long-term training goal that a single *Course* cannot satisfy on its own.

Learning Certification – A Learning Certification is an object that contains one or more component *Courses* that must be completed within a specific time period. These components may or may not be subject to validity periods and renewal options.

Learner Access – *Learner Access* determines who can view and enroll in / subscribe to training within the Catalog (optionally subject to manager approval).

Competency – A *Competency* (also known as *Competence*) is a defined skill with a structured guide for evaluating and developing supporting behaviors for the skill as an individual employee. Competencies can be awarded to Learners based on their completion of a *Course*, *Learning Path*, or *Learning Certification* (optionally subject to manager approval). *Competencies* can also be required for a Learner to have before they are allowed to take a *Course* or for an Instructor to be assigned to a specific *Class*.
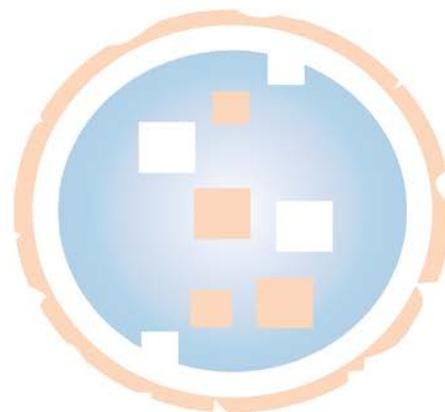
Getting Started

- To access the Oracle Learning Management system, open a web browser and navigate to your Oracle E-Business Suite instance.

- Enter your **User Name** and **Password**.

- Click the **Login** button.

- The first time you log into the system, you will be prompted to changed your password:
    - Enter your old password
    - Enter your new password
    - Confirm your new password

- You will be brought to the main *Oracle Navigator* page.

- Please note that your screen may look a little bit different, depending on which roles and responsibilities you have access to in your environment.

- The four main responsibilities available for Oracle Learning Management are:
  o *Learner Self-Service* – where employees will access their training details;
  o *Learner Manager* – where supervisors will view and manage training for their employees;
  o *Learning Instructor Self-Service* – where Class facilitators will view details for training they have been assigned to teach;
  o *Learning Administrator* – where you will manage your Catalog structure, enrollments, subscriptions, resources, online content, and groups.

Details of what is possible within the Learner, Manager, and Instructor responsibilities are covered throughout this guide.
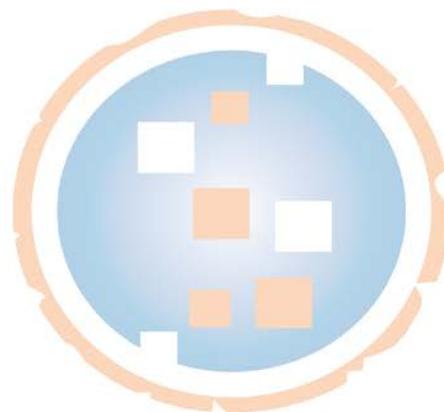
Common Tasks

Viewing and Closing Your Open Worklist Notifications

The Worklist shows notifications related to enrollments, subscriptions, due dates, and other data. You may specify other users you would like to be able to view and / or act upon your Worklist notifications.

To access your Worklist, log into your *Oracle E-Business Suite* instance and do one of the following:

- Immediately after login, you will be taken to the *Oracle Navigator* page.
    - Here you will see a section called *My Worklist*.
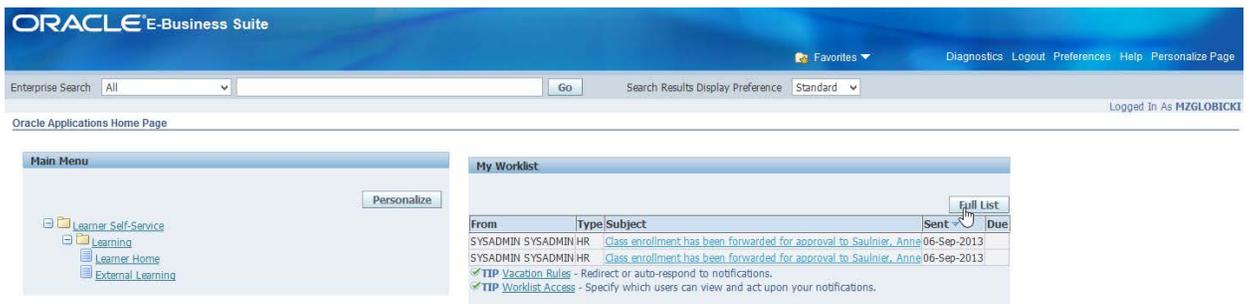
- To review a complete list of *Worklist* notifications from the *Oracle Navigator* page, click the **Full List** button on the far right side of the page.

- To review the details for an item in your Worklist, select the link for its **Subject**, and you will be taken to its details page.

- Alternately, you can view your Worklist via the *Current Learning* page:
    - Navigate to your *Current Learning* page.
        - View your Worklist by clicking on the, "**You have __ new notifications**," link at the bottom of the *Announcements* section.

- Your *Worklist* will be shown.

- Click on the **Subject** of any notification you wish to view.

- The notification's details page will appear.

- If you would like to close the notification so that it no longer appears in your Worklist, click the **OK** button.

  > If you would like to automatically view your next notification, select the **Display next notification after my response** checkbox in the lower-left corner before clicking an action button. The system will remember your choice, and this option will be saved / the box will remain selected.

- You can also chose to access multiple notifications from the *Worklist* page at once by selecting their check boxes and then clicking the **Open** button, as shown below.
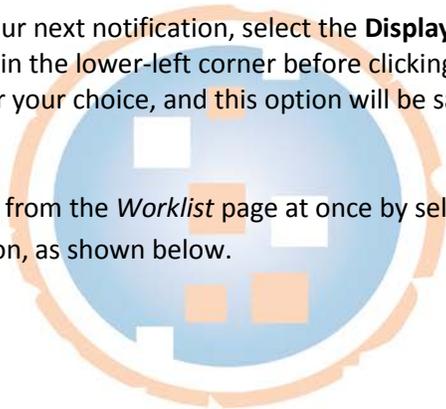
ORACLE Learning Management

Navigator ▼ Favorites ▼   Home Logout Preferences Help Personalize Page Diagnostics

Learner Home | Course Catalog | Learning History
Current Learning | Requested Learning | Forums and Chats
Learner Home: Current Learning >

Worklist

View [Open Notifications ▼] [Go]

Select Notifications: [Open] [Reassign] [Close]

Select All | Select None

Select	From	Type	Subject	Sent ▼	Due
☐	SYSADMIN SYSADMIN	HR	Class enrollment has been forwarded for approval to Saulnier, Anne	06-Sep-2013	
☑	SYSADMIN SYSADMIN	HR	Class enrollment has been forwarded for approval to Saulnier, Anne	06-Sep-2013	
☐	SYSADMIN SYSADMIN	HR	Class enrollment has been forwarded for approval to Saulnier, Anne	06-Sep-2013	
☑	Zglobicki, Molly	HR	You have successfully enrolled in the class.	06-Sep-2013	
☐	SYSADMIN SYSADMIN	HR	Class enrollment has been forwarded for approval to Saulnier, Anne	06-Sep-2013	
☑	Zglobicki, Molly	HR	You have successfully enrolled in the class.	06-Sep-2013	

✔ **TIP** Vacation Rules - Redirect or auto-respond to notifications.
✔ **TIP** Worklist Access - Specify which users can view and act upon your notifications.

Learner Home Course Catalog Learning History Home Logout Preferences Help Personalize Page Diagnostics
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- The first notification's details page will be shown.

ORACLE Learning Management

Navigator ▼ Favorites ▼   Home Logout Preferences Help Personalize Page Diagnostics

Learner Home | Course Catalog | Learning History
Current Learning | Requested Learning | Forums and Chats
Learner Home: Current Learning > Worklist >

ⓘ Information
    This notification does not require a response.

Class enrollment has been forwarded for approval to Saulnier, Anne

                                Step 1 of 3 [Next]   [OK] [Reassign] [Request Information]

From **SYSADMIN SYSADMIN**
  To **Zglobicki, Molly**
Sent **06-Sep-2013 14:21:01**
  ID **5086992**

Action History

Sequence	Name	Action	Date	Notes
1	Zglobicki, Molly	Submit	06-Sep-2013 14:21:00	
2	Saulnier, Anne	Pending		

Return to Worklist   Step 1 of 3 [Next]   [OK] [Reassign] [Request Information]

Learner Home Course Catalog Learning History Home Logout Preferences Help Personalize Page Diagnostics
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- To view the next notification, click the **Next** button.

- The next notification that you chose to view will be displayed.

> 💡 If you selected only 2 notifications, you will see a **Continue** button rather than a **Next** button.

- To close a notification from its details page, click the **OK** button.

- The notification will be closed and the next notification's details will be shown, or you will be returned to your main *Worklist* page.

    ⚠️ When closing a notification from its details page using the **OK** button, the system will not display a warning; the notification will just be closed out.

- From the *Worklist* page, you can close an individual notification or multiple notifications at once by selecting it / them and clicking the **Close** button.

- A *Warning* page will appear.

- Click the **Apply** button to move forward with closing out the notification(s).

- The notification(s) will be closed and you will be returned to your main *Worklist* page.

> ⚠️ You cannot re-open a notification after it has been closed, but you can still view its details.

- To exit the *Worklist* page, you may use a breadcrumb trail link to either:

  o Return to your *Current Learning* page, if you accessed your Worklist via your Current learning page.

  o Or be returned to the *Oracle Applications Home* page, if you accessed your Worklist via the Oracle Navigator page.
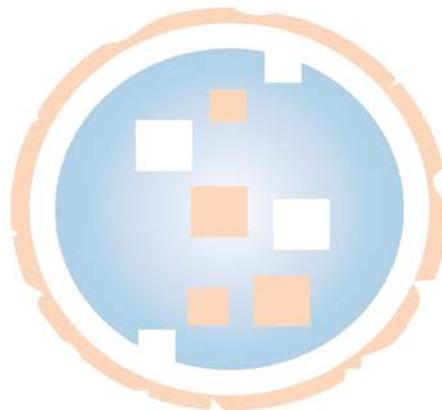
Viewing Different Types of Worklist Notifications

From the *Worklist* notifications page, you can use the *View* drop-down menu to access closed notifications or see other types of *Worklist* notifications.

- Choose the desired *View* option from the drop down menu, and click the **Go** button.
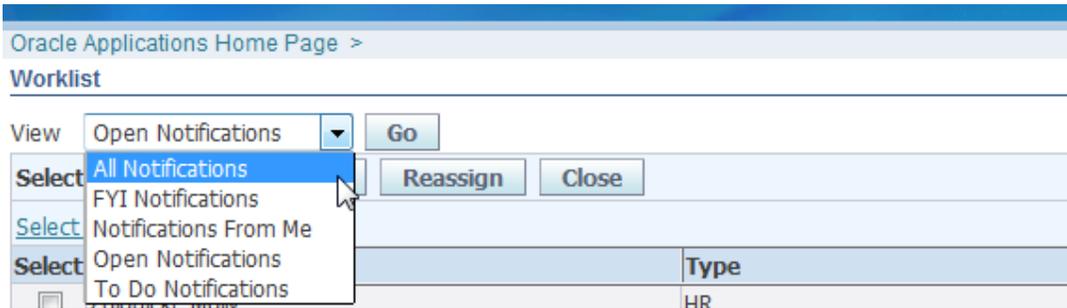
Note: Selecting the *All Notifications* option will make canceled and closed notifications visible. The system will automatically sort and display *All Notifications* in alphabetical order by *Status*.

- From this screen you can also select individual or multiple notifications, or the entire list to change their status or view them at once.
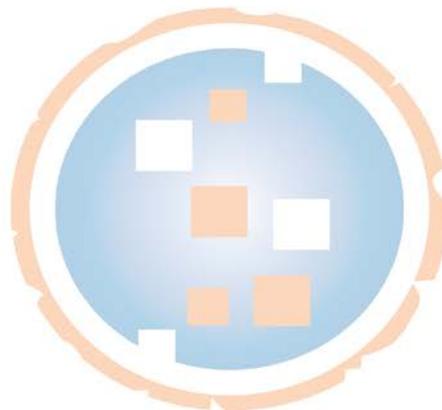
Reassigning Worklist Notifications

You can reassign notifications in two ways:

1. You may *delegate your response* to another user (grant another user the ability to respond to a notification on your behalf without transferring ownership of the notification to that user).
2. You may also choose to *transfer notification ownership* to hand over full responsibility and ownership of the notification(s) to the selected user.

- Navigate to your *Worklist* page.

- Select one or multiple notifications to reassign.

> ⚠️ Multiple notifications can only be selected and reassigned collectively, as a group, to the same user. If you are reassigning multiple notifications to different users, you must select them based on their intended reassignments.

- Click the **Reassign** button.

- The *Reassign Notifications as Group* page, or the *Reassign Notification* details page will appear (depending on whether you have selected one or multiple notifications):

> If you are only reassigning a single notification, you may also do so by selecting its link in the **Subject** column and reassigning it via its details page.

- Choose the appropriate User Type from the *Assignee* drop down menu.

- Enter the person's name, starting with their **last name**, in the *Assignee* search field and click the magnifying glass. 🔍

- The *Search and Select: User or Role* window will appear.

- Click the **Quick Select** icon next to the name of the individual to whom you want to grant access to your Worklist.
  - Alternately, you can enter a partial name to search for.

If you enter the first 3 characters of a person's last name and wait a few seconds, the system will automatically display a pop-up window listing all search results matching your search criteria, as shown in the screen shot below. You may then select the person's name and it will be entered into the **Assignee** field.

The *Name* field also supports use of a wildcard character (%) at the beginning of a search string. Keep in mind, however, that the search results will return names that include ALL of the associated Assignee Types (if the *%* sign is used alone) and, if a letter or letters are added, will return ALL names that include the entered letter(s).

- Choose whether to **Delegate your response**, or **Transfer notification ownership** using the appropriate radio button.

- Enter any **Comments** you would like to add.

- Click the **Submit** button.
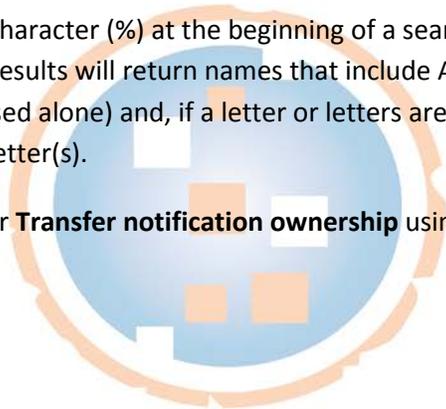
ORACLE Learning Management

Navigator ▼   Favorites ▼   Home Logout Preferences Help Personalize Page Diagnostics

Learner Home | Course Catalog | Learning History
Current Learning | Requested Learning | Forums and Chats
Learner Home: Current Learning > Worklist >
Reassign Notifications as Group
Use 'Delegate' to give another user authority to respond to a notification on your behalf, while still retaining ownership or 'Transfer' to give another user complete ownership of and responsibility for that notification.
* Indicates required field

Cancel
Submit

Selected Notifications

From	Message Type	Subject	Sent	Due Date
Zglobicki, Molly	HR	You have successfully enrolled in the class.	06-Sep-2013	
Zglobicki, Molly	HR	Successfully subscribed to Learning Path.	06-Sep-2013	

Reassign all selected

* Assignee Employee ▾ Saulnier, Anne 🔍
      ⦿ Delegate your response
      ○ Transfer notification ownership
Comments [   ]

Return to Worklist   Cancel Submit

Learner Home Course Catalog Learning History Home Logout Preferences Help Personalize Page Diagnostics
About this Page   Privacy Statement   Copyright (c) 2011, Synergy Codeworks, LLC. All rights reserved.

- The system will make the change(s) without displaying a confirmation message.

- You will be returned to your *Worklist* page.
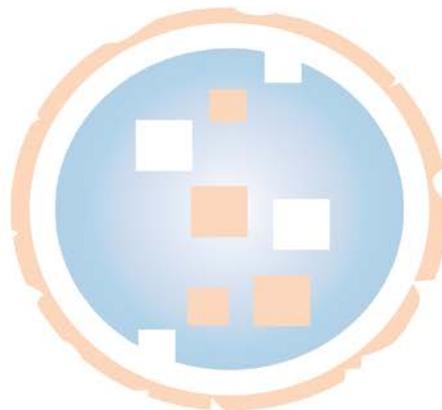
Granting Other Users Access to Your Worklist

You may delegate other system users to view and act upon your worklist.

- From the *Oracle Navigator* page, at the bottom of the *My Worklist* section, click on **Worklist Access**.

- Alternatively, from the *Worklist* page, click the **Worklist Access** link.

- The *Worklist Access* page will appear.

- Click the **Grant Worklist Access** button.

- The *Grant Worklist Access* information page will appear.

 Fields marked with an asterisk (*) are required.

- Choose the appropriate User Type from the *Name* drop down menu.

- Enter the person's name, starting with their **last name**, in the *Name* search field and click the magnifying glass.

- The *Search and Select: User or Role* window will appear.

- Click the **Quick Select** icon next to the name of the individual who you want to grant access to your Worklist.
  - o Alternately, you can enter a partial name to search for.

If you enter the first 3 characters of a person's last name and wait a few seconds, the system will automatically display a pop-up window listing all search results matching your search criteria, as shown in the screen shot below. You may then select the person's name and it will be entered into the **Name** field.

The *Name* field also supports use of a wildcard character (%) at the beginning of a search string. Keep in mind, however, that the search results will return names that include ALL of the associated User Types (if the *%* sign is used alone) and, if a letter or letters are added, will return ALL names that include the entered letter(s).

- You can grant access to *All Item Types*, or only to certain *Selected Item Types*.

  - o To grant access to *All Item Types*, leave the radio button selected for that option.

  - o To grant access to *Selected Item Types*, choose the **Selected Item Types** radio button.

    - ▪ The *Available and Selected Item Types* interface will appear.

- Select the Item Type(s) that you want the user to have access to, and use the buttons in the middle to move it / them over to the *Selected Item Types* list.

- Once you have selected and moved all of the desired Item Types, click the **Apply** button.

- The *Worklist Access* page will appear, indicating that the user has been granted access to your worklist.

- Use the *Worklist Access* page to update or delete users at any time.

- Click the **Return to Worklist** link to return to your Worklist, or use the breadcrumb trail link to be returned to either your *Learner Home* or *Oracle Navigator* page.

Learner Self-Service

Introduction

Oracle Learning Management's Learner Self Service interface provides easy access to the tools you need to manage your own learning in the system as a Learner. You can review and control your current, requested, and historical learning and create Learning Paths. You can also browse Categories and drill down into them to find Courses, Learning Certifications, Learning Paths, and related Forums and Chats.

Viewing Your Current Learning

You can view multiple aspects of your *Current Learning* with ease via the *Learner Home* page. *Learner Home* offers convenient ways to search for and enroll in a class directly, view Learning Paths and Enrollments, see Announcements and browse the Catalog. As a Learner, you can also take advantage of centralized access to Forums and Chats from their *Learner Home* page.

- To access your *Current Learning* or *Learner Home* page, do one of the following:

    - From the *Main Menu*, expand the **Learner Self-Service** responsibility, choose **Learning,** and then select the **Learner Home** link.
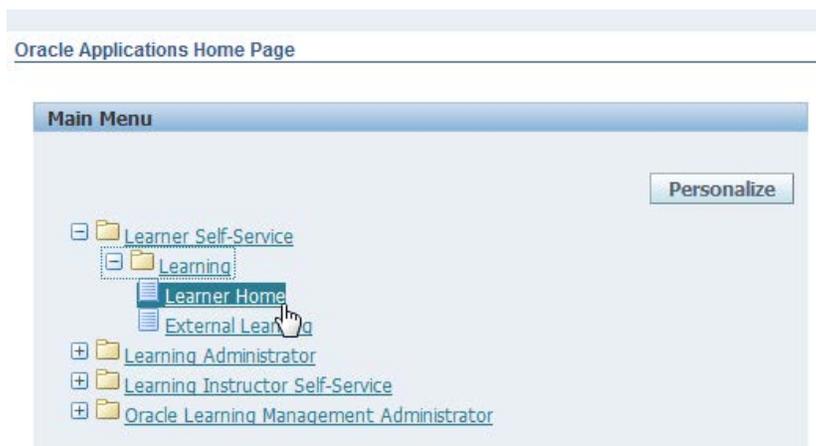
    - Alternately, from any page in the application, click the **Navigator** button, hover over *Learner Self-Service*, hover over *Learning,* and then select **Learner Home.**

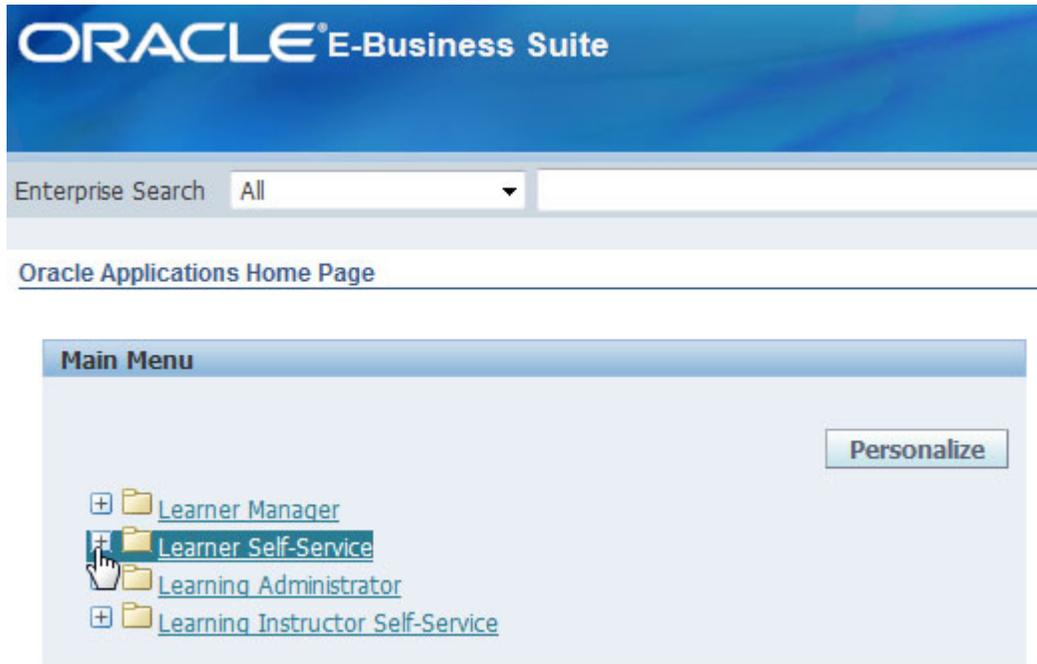- Your *Learner Home* page will appear.

- If you are subscribed to any Learning Certifications, they will appear at the top of the page, followed by Learning Paths, and then active Enrollments.
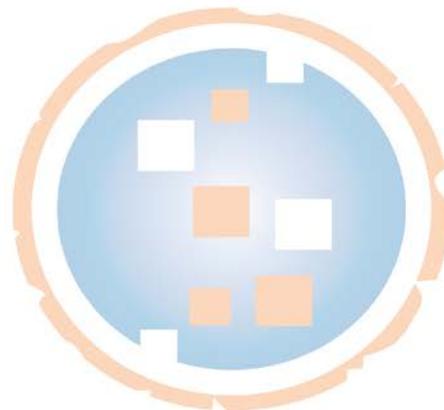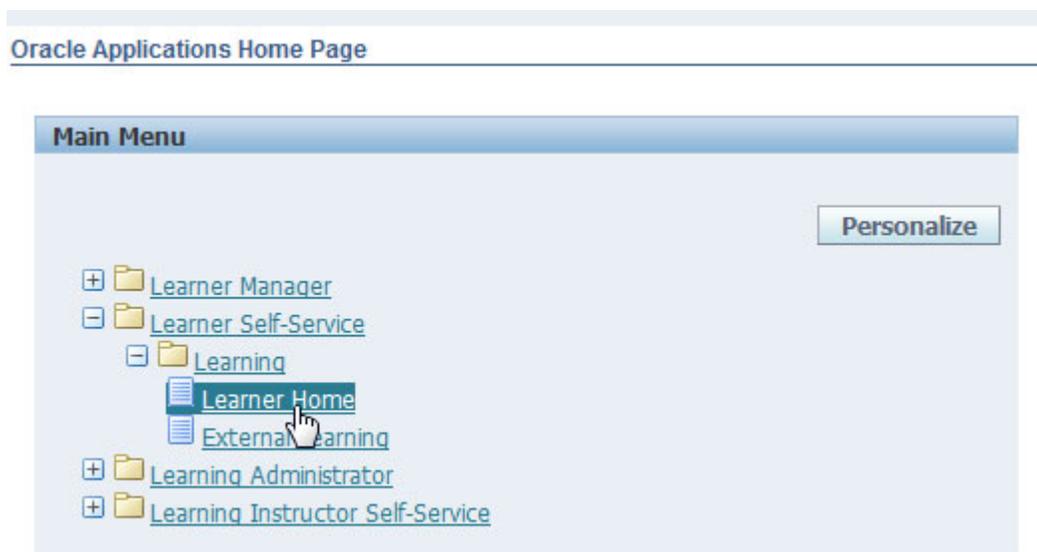
Viewing Announcements

You can view your current *Announcements* via the *Learner Home* page.

- On the *Oracle Applications Home* page, expand the **Learner Self-Service** Responsibility.

- Expand the L*earning* folder and choose the **Learner Home** function.

- Your *Current Learning* page will appear; the *Announcements* section is located in the upper right corner.

- To view the details of an announcement, click on it.

- The details page for the selected *Announcement* will appear.

- To return to your *Learner Home* page, click the **Return to Learner Home** link beneath the *Announcements* section.

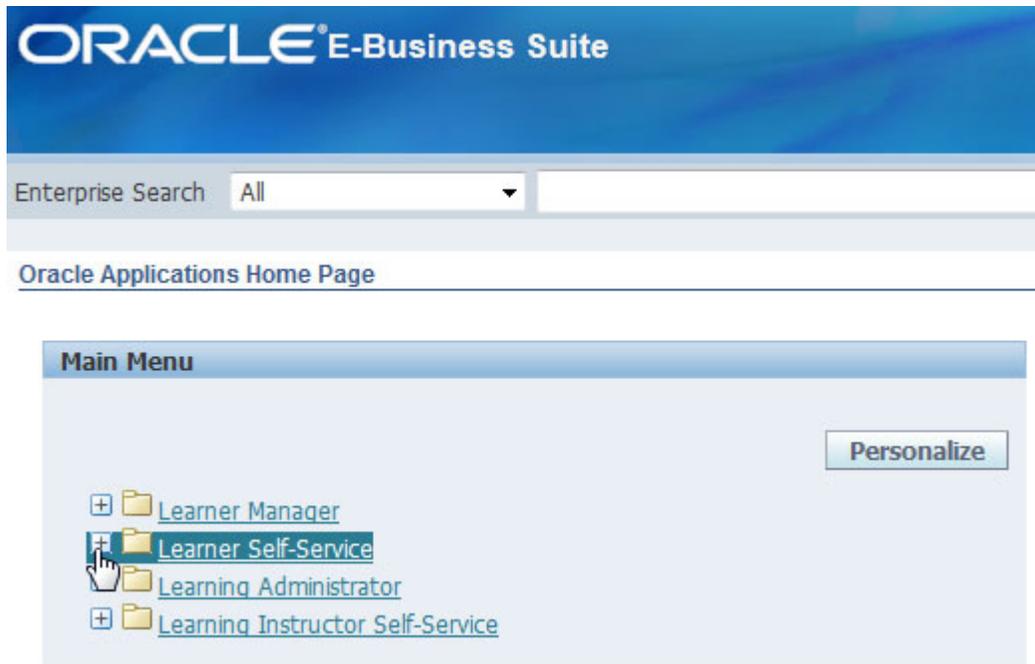You can also view any new notifications you may have through this section by clicking on, "**You have _ new notifications**" at the bottom of the *Announcements* list. Doing so will take you to your open *Worklist* notifications.
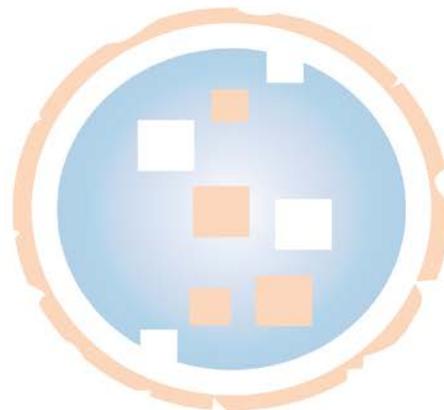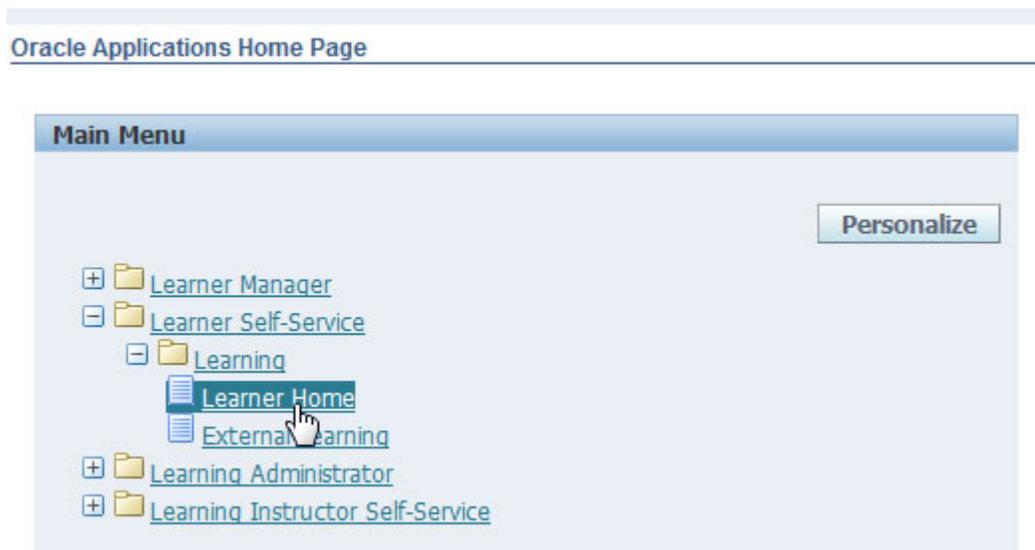
Launching Online Training

- On the *Oracle Navigator* page, expand the **Learner Self-Service** Responsibility.

- Expand the L*earning* folder and choose the **Learner Home** function.

- Your *Learner Home* page will appear.

- Go to the *Enrollments* section.

Enrollments

Enrollments include all current enrollments, including those in classes that are part of a learning certification or learning path.

⊞ Show Key Notation

| Class Name	Type	Status	Item in	Start Date	End Date	Completion Date	Time Zone	Play	Move to History	Unenroll	Evaluate or Sign
Managing Online Learning		Not Attempted		19-Sep-2012 00:00:00			Central Time				
Working with the Oracle Learning Management Catalog		Not Attempted		19-Sep-2012 00:00:00			Central Time				
Introduction to Oracle Learning Management		Not Attempted		02-Feb-2011 00:00:00			Central Time				
Bounce Test 021012 140183		Not Attempted		02-Oct-2012 00:00:00			Central Time				
Online Self-Paced 140184		Not Attempted		02-Oct-2012 00:00:00			Central Time				

⚠ Before you proceed, ensure that all pop-up blockers have been disabled in your browser.

- Click the **Play** icon associated with the class you wish to launch.

- A new browser window will open, and the selected online content will be displayed.
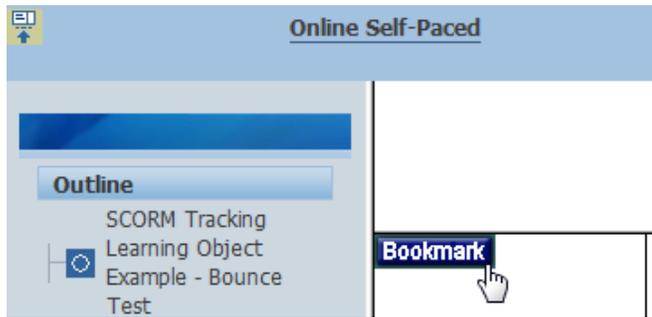

- Online classes with more than one module will show a "+" sign in the outline view, as shown below.
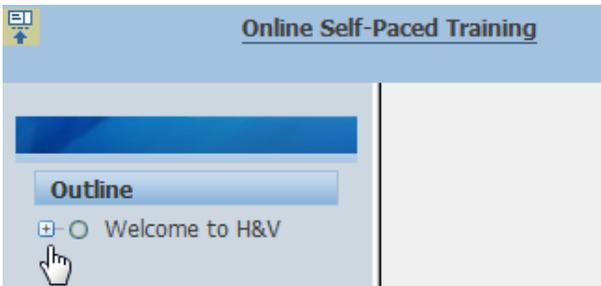
- Click the "+" sign to expand the list and view the full list of modules for the training.

- Some custom-developed online content may provide the option to manually mark your place within the training by clicking a **Bookmark** button.

⚠️ To ensure the proper functioning of tracking within the training, always exit training by clicking the **Player Close** icon: ⊗ or the Player Home icon: 🏠 (do <u>not</u> use the browser's red close button).

- The system tracks how long a learner has spent on each online training module as well as any scores that were earned while taking quizzes, assessments, or tests.

- To view the time recorded for a specific online training, click the link in the *Status* column associated with the class on the *Learner Home* page.

- You will see a page similar to this.

- The *Outline* section shows detailed information about the Class' Status, including how much time has been spent on that particular class if it is online self-paced.

- Click the **Return to Home** link to return to your *Learner Home* page.

The Unofficial Guide to Oracle® Learning Management (OLM) for Learners, Managers, and Instructors

Whether you're new to the system or a seasoned pro, check out the Synergy Codeworks definitive (albeit unofficial) guide to Oracle® Learning Management.

We think you'll agree that this is the most accessible and easy-to-follow OLM guide in existence. Get step-by-step instructions (with screenshots) and best-practice recommendations for using the latest functionality in Oracle® Learning Management.

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