The Unofficial Administrator’s Guide for Oracle Learning Management

Specific to Version 12.2
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Tips for Navigating this User Guide

This user guide provides details specific to OLM Learning Administrators. There are several formatting conventions used throughout this guide that will help you by providing 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**
- **Key questions to ask**
Welcome to Oracle Learning Management
Provide a Single Source of Training Truth for Your Organization

Oracle Learning Management (OLM) allows you to manage all aspects of your corporate training in a single, centralized system. Because OLM integrates seamlessly with your existing Oracle Human Resources application, your pre-established organization and supervisor hierarchies are already built in. This means that personnel and assignment information is updated in real-time with no technical interfaces or manual intervention required.

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

- Track and manage enrollments and subscriptions;
- Logically group similar Courses together into Learning Paths;
- Certify Learners (once, or on a recurring basis);
- Leverage competencies as pre-requisites or awards for Courses, Learning Paths, or Learning Certifications;
- Enforce Course or Player prerequisites;
- Dynamically group Learners together based on personal or professional details, including eligibility profiles;
- Assign Administrator security to maintain the integrity of your Catalog;
- Automatically enroll Learners into required training;
- Manage waitlists based on first-come-first-serve or weighted priorities.
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 upcoming 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 Terminology

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 what 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 how you are teaching the material to your Learners. A Course can have multiple Offerings.

Naming conventions are important to consider when implementing Oracle Learning Management. A best-practice recommendation for naming your Offerings is to make sure that you are consistent. If you have several E-Learning courses, you will want to make sure that the Offering name is the same for all (i.e., Online Self-Paced or E-Learning) so that the employee has a good idea of how the training will be delivered as soon as they see the Offering name.

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. Learners enroll in Classes. As an example, a Class 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 where and when of your training.

A common implementation mistake is to re-use the name of the Course for the Offering and Class. Don’t do this. It’s okay to repeat the name of the Course at the Class level if you have an online, self-paced Offering, but scheduled training Classes should include something that indicates the date, time, or location of the Class in its name.

![Warning]

Here is a good example of a naming convention to use for a Course with multiple Offerings:

- Introduction to Oracle Learning Management (Course)
  - Online Self-Paced Training (Offering)
    - Introduction to Oracle Learning Management (Class)
  - Instructor-Led Training (Offering)
    - Introduction to Oracle Learning Management – Portland – December 8th and 9th (Class)

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.

![Tip]

A session is useful if you have a guest speaker for a portion of a Class and you want to make sure that they are not needlessly booked in the system for longer than necessary. It would also be beneficial if you had a multi-day Class that had different classrooms booked for each day of the training.

![Warning]

When you copy a Class (i.e., if you have a regularly scheduled orientation training on the first Tuesday of every month), Sessions are not copied over and will need to be re-created manually.

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 Paths are great for programs like new hire orientation training. It’s possible to add multiple Sections to a Learning Path, with a combination of required Courses and optional Courses. For example, you could have a Section that contains policy documents that pertain to all new hires, and then include a Section that provides the Learner with the ability to choose an appropriate Course from a list of options based on his or her job.

Once a Learning Path has one or more Learners subscribed to it, you are not able to add or remove Courses that are components of the Learning Path. In order to make changes to an existing Learning Path, you’ll need to create a new Learning Path, end date the old Learning Path, and copy over any subscriptions that exist.

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.

Learning Certifications are less “friendly” than Learning Paths. If a Learner does not complete the required training within the allotted time period, they will be locked out of the training and an Administrator will need to go in and manually reset the period within which the Learner can take the Class. This can be a significant administrative burden if you have a large number of Learners that do not complete their training on-time.

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

Learner Access is applied hierarchically. You can add to Learner Access settings at a lower level in the Catalog, but in the case of a conflict in settings between a higher-level Catalog object and a lower-level Catalog object, the “parent” object always wins.

Also, Learner Access doesn’t mean anything at all unless the Restricted checkbox is selected for the Class, Learning Path, Learning Certification, Category Forum, or Category Chat. If that checkbox is not selected, the system never even looks at the Learner Access settings and just chooses whatever the default setting is for your environment (globally require approvals or allow self-enrollment).

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.

Content Terminology

Folder – Folders are used to organize online content in much the same way the Categories are used to organize the Catalog.
**Learning Object** – *Learning Objects* facilitate the management and delivery of online content. *Learning Objects* are database items that represent pieces of physical content that reside on a content server or within a web-accessible location.

**Question Bank** – A *Question Bank* is a repository of *Questions* and their responses that are created at the *Folder* level. *Question Banks* allow you to manage and reuse *Questions* in multiple *Tests* and evaluations. At least one *Question Bank* must exist before you create a *Test* or *Evaluation*.

**Question** – *Questions* contain prompts, potential responses, and feedback. Each Question’s set of responses depends on the Question type (True / false, fill-in-the-blank, multiple choice with single correct response, multiple choice with multiple correct responses, or free text).

**Test** – *Tests* are collections of *Questions* in one or more Sections. Tests can either be scored or not scored. Tests may be mapped to Offerings directly, or embedded underneath a “parent” *Learning Object* and consumed as part of a larger, online, self-paced *Offering*.

**Evaluation** – An *Evaluation* is an un-scored collection of *Questions* that is automatically sent out to Learners once they have completed a Class. Evaluations may be mapped to a *Course* (to collect feedback about *Course* content) and to a *Class* (to gather feedback on a specific Instructor / *Class*).

Oracle Learning Management does not verify the names of Folders, Learning Objects, Evaluations, or Tests, so it is a good idea to come up with a naming convention for your Content structure (particularly if you have multiple Administrators that will be importing, uploading, and creating content).

It is not possible to delete Learning Objects, Tests, or Evaluations once there have been attempts associated with them. You can also never move a Content object from one location to another in the Content hierarchy.
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 change 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 your 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 Administrator responsibility are covered throughout this Guide.
Learning Administrator

⚠️ When navigating through the Learning Administrator interface, do not use your browser’s back button. The system passes variables from page to page and may lose context if you do not use the on-screen links and navigation elements.

Overview of the Catalog Tab

From the Catalog page, you can search for and edit learning objects including Categories, Learning Paths, Learning Certifications, Courses, Offerings, Category Forums and Category Chats.

Searching for Catalog Objects

- On the Oracle Applications Home page, expand the Learning Administrator Responsibility.

- Expand the Learning Administration folder and choose the Catalog Administration function.
• You will be taken to the Catalog page.

• Click the Plus Sign icon for any category object to view its child objects.

• Click the Details icon associated with an object to view its details.

• You can also easily access an object’s offerings by clicking the Offerings link in the row associated with the object.
• Click the **Classes** link associated with an object to access an object’s classes.

• To **Search** for a specific Catalog object, select the type of object you are searching for from the **Search** field dropdown menu.
  
  o Enter the name of the object in the text section of the **Search** field and click the **Go** button.
  
  o Click the **Advanced Search** link to the right of the **Search** field to execute a more detailed search.
Here, you can search for a specific object based on its Name, Start Date and/or End Date.

- Once you've executed a search, click the View in Hierarchy icon to see the Catalog Object in its original location.

- To return to the Catalog page and access the full list of Catalog objects, click the View Full Hierarchy button.
• Alternatively, click the Catalog tab and you will be returned to the Catalog page.

Navigation Tip: Focusing in on a Catalog Object

• To drill in on a particular Catalog object, simply click the Focus icon.

• The view will update to show the selected Catalog object as the top-level item.
Creating New Catalog Objects

When creating a new Catalog object, it is mandatory to adhere to the existing Catalog hierarchy. Courses may be created under any Category other than the root Category. Offerings can only be created under Courses, Classes can only be created under Offerings, and Sessions can only be created under Classes.

The system will only let you create Catalog objects that adhere to this structure. For example, you will not be able to create an Offering under a Category because the system will return an error message.

The sections that follow later in this document will explain, in greater detail, how to create new Catalog objects.

Moving Categories

It is possible to move a Category by simply highlighting its corresponding radio button, clicking the Move button, and specifying where you’d like to move it. Here are the detailed steps:

- Select the radio button next to the name of the Category you wish to move.

- Click the Move button.
The **Move Category** page will appear.

Navigate to and select the radio button next to the **Category** under which you’d like to move it.

Click the **Apply** button.

The start and end dates of the category being moved must fall within the same start and end dates of its new parent category.

A **Confirmation** message will appear, indicating that the object was successfully moved.
• The Confirmation page also conveniently displays the focused-in view of the parent catalog object.

Moving Other Catalog Objects

To move Courses, Learning Paths, and/or Learning Certifications, you must list the Catalog Object in multiple Categories, reset its Primary Category, and delete the original Category from its list of Categories. Here are the detailed steps:

• Navigate to the Details page for the Course, Learning Path, or Learning Certification you’d like to move.

• Click the Categories link on the left-hand side of the page.

• Click the Add button.
Enter the full or partial name of the Category under which you’d like to move your object, and click the Tab key on your keyboard to execute the search. Click the Quick Select icon next to the Category to choose it. Alternatively, you may use the Search icon to launch the Search and Select window.

- Click the Apply button.
The learning object’s start and end dates must fall within the start and end dates of the target category.

- A Confirmation message will appear and the Course’s Categories page will appear, showing the newly-added Category.

<table>
<thead>
<tr>
<th>Category</th>
<th>Parent Category</th>
<th>Update</th>
<th>Version</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>ETP</td>
<td>Year Corporation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Training</td>
<td>Water Corporation</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Click the **Set Primary Category** button.

- Enter the name of the Category you just added in the **Category** field.

- Click the **Apply** button.
- A **Confirmation** message will appear, indicating that the change has been applied successfully.

- Note that the **Primary Category** icon / indicator 📞 is now adjacent to the newly-set Primary Category.

- Click the **Remove** icon ✗ next to the Category from which you’d like to remove the Catalog Object.

- A **Warning** message will appear. Click the **Yes** button to proceed.
• A Confirmation message will appear, and you will be taken back to the Course’s Categories page.

• Note that the newly-associated Category is now the only one listed, and is also the Primary Category.

Deleting Existing Catalog Objects

It is only possible to delete Catalog objects that do not have any child objects. For example, to delete a Course, you would first need to delete any enrollments that exist for any corresponding Courses, then delete the corresponding Classes, then delete the corresponding Offerings, and then finally then delete the Course.

It is not possible to delete classes that have enrollments, and enrollments with attempts can never be deleted. As a result, some courses cannot be deleted.

Here are the detailed steps for deleting a Course:

• From the Catalog tab, highlight the radio button next to the Course that you’d like to delete.

• Click the Delete button.

• A Warning page will appear.
• Click the Yes button to confirm.

• As long as you have no child Offerings and/or Classes, you will receive a confirmation message that the delete was successful.

You may delete any object in the Catalog as long as it does not contain any children. Categories may not have any child objects, Offerings may not have any Classes, and Classes may not have any Enrollment or Attempts against it in order for the system to allow you to delete it.

The Manage page for each item has an icon for deleting child objects. An example of the Manage Offerings page is displayed below.
The Unofficial Administrator’s Guide to Oracle® Learning Management (OLM)

Whether you’re a new Oracle® Learning Management Administrator or have been managing the system for years, the Synergy Codeworks definitive (albeit unofficial) guide to Oracle® Learning Management is a must-have reference book. Find straightforward information on hundreds of tasks, little-known facts, and tons of time-saving tips.

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 detailed navigation paths) for taking advantage of the latest functionality in Oracle® Learning Management.