

Oracle PeopleSoft Enterprise Learning Management 9.2

ADMINISTRATOR TRAINING GUIDE

SPD 9.2 ELM TRAINING ADMINISTRATION

ORACLE
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Learner Groups

Lesson 1: Add a Learner Group

Lesson 2: Update Learners Groups

A **Learner Group** identifies groups of learners who will complete training together. Learner groups can be created by Business Unit, individual Learner ID, Job Codes, etc.

Learner groups are defined groups of learners that share some of the same learner attributes, such as the same department, region, or job code. Use learner groups to:

- Specify the categories, courses, classes, and programs a learner can access through the catalog.
- Perform group or mass enrollment.
- Assign objectives.
- Specify the types of supplemental learning a learner can report.

One of the primary functions of learner groups is to control access to the learning catalog. For a user to access a particular class in the catalog, the user must belong to a learner group that is assigned to the **class**, the **course**, and the **category** (State agency) that's associated with the course.

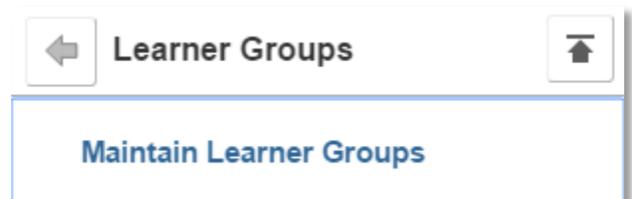
Learner group data is defined by associating a Learner Group with a **Learning Environment and Owner** (administrator). Learning environments control which parts of the catalog an administrator can view and update, as well as the default values and options that are associated with the objects (such as categories, courses, class, and programs). The learning environment also enables administrators to access the instructors and resources that are available for assignment.

Lesson 1 - Add Criteria Based Learner Group

Define learner group data by associating the learner group with a learning environment and owner.

This lesson teaches administrators how to add a learner group.

1. Click **Enterprise Learning>Learner Groups>Maintain Learner Groups**
2. The **Add Criteria Based Learner Group** option creates a new learner group with group members based on specified group criteria, such as business unit, department, or job code.
 - a. Click the **Add Criteria Based Learner Group** link.



The screenshot shows the 'Learner Group' form in the Oracle PeopleSoft ELM Training Administration interface. The form is titled 'Learner Group' and is part of a navigation menu that includes 'Learner', 'Group', 'Category', 'Course', 'Class', 'Program', and 'Supplemental'. The form contains the following fields and controls:

- *Description**: A text input field.
- Short Description**: A text input field.
- *Learning Environment**: A dropdown menu currently set to 'Core Learning Activities'.
- *Owner**: A text input field with a magnifying glass icon for search.
- *Group Status**: A dropdown menu currently set to 'Active'.
- Automatically maintain membership**: An unchecked checkbox.
- Comments**: A large text area with a '254 characters remaining' indicator.
- Last Refreshed On**: A label for a date field.

Navigation buttons at the top and bottom include 'Save', 'Create New', 'Delete', 'Previous', 'Next', and 'Return To Search Page'.

3. Click in the **Description** field.
 - a. Enter a description into the **Description** field.

It is recommended to use the **agency acronym** (such as DOC, DCS, FSSA, DNR, etc.) at the beginning of the title.

4. Click in the **Short Description** field.
5. Enter the group name abbreviation into the **Short Description** field.
6. Click the **Learning Environment** drop-down menu button.
7. Select the learning environment to associate with the learner group from the list of values.
8. Click the **Owner** Magnifying Glass button to search for the owner's learner id.
9. When checked, the **Automatically Maintain Membership** checkbox will automatically update learner group membership when the ELM system update occurs.
10. Check the **Automatically Maintain Membership** checkbox.
 - a. If this item is not checked when a learner group is created and saved, this item *cannot* be checked later.

The ELM integration runs hourly between **7:00 A.M. – 7:00 P.M.** to update (refresh) system data. The integration process currently occurs at **9:00 a.m., 2:00 p.m., and 7:00 p.m.** System changes made prior to a refresh will not show in the system until after the update occurs.

Scheduled Mass Enrollments are **automatically** kicked off every day at 7:00 P.M.

11. Click in the **Comments** field to enter any learner group related comments.
12. Click the **Group** tab.
13. Click the **Criteria Type** drop-down menu button.
14. Select the correct criteria type from the list of values.
15. Click the **Operation** drop-down menu button to change the operation criteria if needed.

Operation values include:

- < Less than
- <= Less than or equal to
- <> Not equal to
- = Equal to
- > Greater than
- >= Greater than or equal to

16. Click the **Criteria Value Magnifying Glass** button to search for the desired criteria value.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria needs to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

17. Enter the desired information into the **Organization Name** field. (Ex. "SPD")
18. Click the **Look Up** button.
19. Select the correct value from the search results list.
 - a. If additional Learner Group Criteria needs to be defined, click the **Add** a new row button to add the additional information.
20. Confirm the **AND/OR** values are properly set to capture criteria relationships by clicking the **AND/OR** drop-down menu buttons to select and/or make any changes

The **AND/OR** values are used to define relationships between the criteria.

For example:

To show a relationship for all members of the State Personnel Department (SPD) Training and Recruiting divisions, the criteria would look like:

Row 1: SPD Business Unit = 00071 **AND**

Row 2: Training Department = 1015 **OR**

Row 3: Recruiting Department = 1023

21. Click the  button (left parenthesis) and the  button (right parenthesis) to group criteria results.

Use **parenthesis** to define complex relationships between the criteria, and how it is grouped can affect the search results.

For example:

If a learner group contains different business units with business unit specific department information, each business unit should be grouped with their own departments using different sets of parenthesis to identify the separate groupings.

To remove a right or left parenthesis, click the  button or  button multiple times until it is removed.

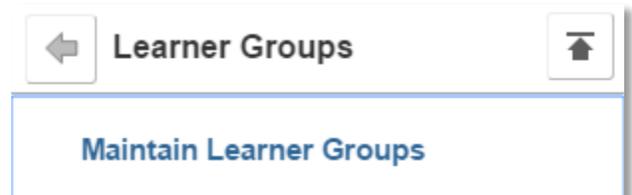
22. Click the **Populate Learner Group** button.
23. Scroll down the page to review the learner group member information.
24. Click the **Save** link.

Lesson 2 - Add Query Based Learner Group

Define learner group data by associating the learner group with a learning environment and owner.

This lesson teaches administrators how to add a learner group using a query.

1. Click **Enterprise Learning>Learner Groups>Maintain Learner Groups**



2. The **Add Query Based Learner Group** option creates a new learner group with group members based on specified group criteria, such as business unit, department, or job code.

- a. Click the **Add Query Based Learner Group** link.

[+ Add Query Based Learner Group](#)

The screenshot shows the 'Learner Group' form in the Oracle PeopleSoft ELM Training Administration interface. The form is titled 'Learner Group' and is part of a navigation menu that includes 'Learner', 'Group', 'Category', 'Course', 'Class', 'Program', and 'Supplemental'. The form contains the following fields and controls:

- *Description**: A text input field.
- Short Description**: A text input field.
- *Learning Environment**: A dropdown menu currently set to 'Core Learning Activities'.
- *Owner**: A text input field with a magnifying glass icon for search.
- *Group Status**: A dropdown menu currently set to 'Active'.
- Automatically maintain membership**: A checkbox that is currently unchecked.
- Comments**: A large text area with a character count of '254 characters remaining'.
- Last Refreshed On**: A label for a date field.
- Created** and **Last Modified**: Labels for date fields.

Navigation buttons are located at the top and bottom of the form: Save, Create New, Delete, Previous, Next, and Return To Search Page.

3. Click in the **Description** field.
 - a. Enter a description into the **Description** field.

It is recommended to use the **agency acronym** (such as DOC, DCS, FSSA, DNR, etc.) at the beginning of the title.

4. Click in the **Short Description** field.
5. Enter the group name abbreviation into the **Short Description** field.
6. Click the **Learning Environment** drop-down menu button.
7. Select the learning environment to associate with the learner group from the list of values.
8. Click the **Owner** Magnifying Glass button to search for the owner's learner id.
9. When checked, the **Automatically Maintain Membership** checkbox will automatically update learner group membership when the ELM system update occurs.

10. Check the **Automatically Maintain Membership** checkbox.
 - a. If this item is not checked when a learner group is created and saved, this item *cannot* be checked later.

The ELM integration runs hourly between **7:00 A.M. – 7:00 P.M.** to update (refresh) system data. The integration process currently occurs at **9:00 a.m., 2:00 p.m., and 7:00 p.m.** System changes made prior to a refresh will not show in the system until after the update occurs.

Scheduled Mass Enrollments are *automatically* kicked off every day at 7:00 P.M.

11. Click in the **Comments** field to enter any learner group related comments.
12. Click the **Group** tab.
13. Click the **Select Query Magnifying Glass** button to search for the desired query. Enter your query name into the Query Name field and hit enter.

The screenshot shows the Oracle PeopleSoft ELM interface. At the top, there are tabs for 'Learner', 'Group', 'Category', 'Course', 'Class', 'Program', and 'Supplemental'. The 'Group' tab is selected. Below the tabs are several action buttons: 'Save', 'Create New', 'Delete', 'Previous', 'Next', and 'Return To Search Page'. The main area is titled 'Learner Group'. It features a 'Select Query' button and a search field with the text 'Select a query to run' and the value 'SOI_IRUA_2017_CATCHALL'. A magnifying glass icon is next to the search field. Below the search field is a 'Populate Learner Group' button.

14. Click the **Populate Learner Group** button.
15. Scroll down the page to review the learner group member information.
16. Click the **Save** link.

Lesson 3 - Update Learner Group Procedure

Updating learner group information may include making a learner group active or inactive or updating learner group criteria and members.

This lesson teaches administrators how to maintain learner group information.

1. Click **Enterprise Learning>Maintain Learner Groups**
2. Click the **Learner Groups** link.

3. Click the **Maintain Learner Groups** link.
4. Enter search criteria to locate a learner group.
5. Click the **Search** button.
6. Click the correct learner group link in the **Name** column of the **Learner Group Results** section.
7. Click the **Group Criteria** tab.
8. To add additional learner group members to existing members, click the **Add a new row** button. (To remove learner group members, click the Delete a row button for the correct row.)
9. Click the **Add a new row** button.
10. Click the **Criteria Type** drop-down menu button.
11. Select the correct criteria type from the list of values.
12. Click the **Criteria Value** Magnifying Glass button.
13. Enter search criteria for the criteria value.
14. Click the **Look Up** button.
15. Select the correct criteria value type from the list of values.
16. Confirm the **AND/OR** values are properly set to capture criteria relationships by clicking the **AND/OR** drop-down menu buttons to select and/or make any changes.

The **AND/OR** values are used to define relationships between the criteria.

For example:

To show a relationship for all members of the State Personnel Department (SPD) Training and Recruiting divisions, the criteria would look like:

Row 1: SPD Business Unit = 00071 **AND**

Row 2: Training Department = 1015 **OR**

Row 3: Recruiting Department = 1023

17. Click the  button (left parenthesis) and the  button (right parenthesis) to group criteria results.

Use **parenthesis** to define complex relationships between the criteria, and how it is grouped can affect the search results.

For example:

If a learner group contains different business units with business unit specific department information, each business unit should be grouped with their own departments using different sets of parenthesis to identify the separate groupings.

To remove a right or left parenthesis, click the  button or  button multiple times until it is removed.

18. Click the **Populate Learner Group** button.
19. Scroll down the page to review group member list changes as needed.
20. Click the **Save** link.

Course Catalog

Lesson 3: Create/Update Course

Lesson 4: Create/Update Delivery Method

Lesson 5: Create/Update Instructor Led Training Class

Lesson 6: Clone a Class

Lesson 7: Adding a Survey Definition

Lesson 8: Adding a Survey Component to a Class

CATALOG COMPONENTS

The Course Catalog consists of three main components:

1. Categories (Owner/Host/Specialty Area)
2. Courses
3. Classes

Learning Catalog

The learning catalog is a repository of information about the courses that are available to internal and external learners, including your organization's employees, contractors, partners, and customers. The catalog supplies detailed information about each class, including a description of its content, learning objectives, prerequisites and other features. Each class can be categorized and assigned keywords so that learners and managers can quickly locate relevant classes in the catalog. Learners and managers can use the self-service browse and search features to view the learning catalog, add classes to their learning plans, and initiate the enrollment process.

Classes represent a specific topic of study for which classes are offered. In general terms, the class represents the course. All classes associated with a given course share the same prerequisites, objectives, equivalencies and other features.

Classes are instances or offerings of a course. Classes are comprised of learning components. Learning components represent how the instructional content of the **class** will be delivered to the learners. For example, learning components can be instructor-led and scheduled, or they can be web-based (computer-based) and self-paced. Classes contain at least one learning component, but they could contain as many as needed to reach the learning objectives of the class.

NAMING CONVENTIONS

Naming Conventions used for system components become important in the way that information is presented within the State of Indiana ELM system. Naming conventions designate a uniform format to be used when creating system component titles to facilitate easy location of desired learning. ELM system components incorporating naming conventions include: categories, courses, and classes.

It is recommended the following naming conventions are to be used for each system component:

1. The course catalog category is the name of the State agency owning or hosting the training (such as State Personnel Department, Indiana Office of Technology, Department of Revenue, etc.).
 2. Courses should begin with the State agency acronym and followed by additional naming convention criteria established by the agency. For example, if the State Personnel Department (SPD) wishes to create a new course within the system and courses are tracked by a numbering system established and maintained by SPD, their course naming conventions may look like: SPD_00051.
 3. Classes should begin with the State agency acronym and followed by additional naming convention criteria established by the agency. For example, if the SPD wishes to create a class for the course listed above, in addition to the numbering system established and maintained for the courses, an extension may be added to identify the class. A class naming convention may look like: SPD_00051_120109. The last segment of the class may identify the date the class will be offered for the course.
-

Lesson 4 - Create/Update Course

It is recommended the following naming convention is to be used for course creation:

- Courses should begin with the State agency acronym and followed by additional naming convention criteria established by the agency. For example, if the State Personnel Department (SPD) wishes to create a new course within the system and courses are tracked by a numbering system established and maintained by SPD, their course naming conventions may look like: SPD_00051.

This lesson teaches administrators how to create and/or update courses.

1. Select **Enterprise Learning>Catalog>Maintain Courses**



2. Enter search criteria to update an existing course or click the **Add a New Value** tab to create a new course.

▼ Search Criteria

Course Code

Course Long Name

Course Short Name

Include History Correct History Case Sensitive

To search for existing data, click the **Search** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

Course Details | Attributes

Course Basic Data Find | View All First 1 of 1 Last

Basic Data | Prerequisites | Equivalents | Notes and Attachments | Security

*Course Long Name

*Course Short Name

*Course Code

Owner

*Effective Date *Course Status

*Description

254 characters remaining

Course Abstract

*Approval Type

*Offering Internal External

Education Units

Estimated Cost

Currency Code

Enable Learning Request Learning Request Threshold

Basic Data | Prerequisites | Equivalents | Notes and Attachments | Security

3. Click in the **Course Long Name** field.
 - Enter the name of the course (beginning with the State agency acronym and followed by additional naming convention criteria established by the agency is recommended) into the **Course Long Name** field.
4. Click in the **Course Short Name** field.
 - Enter the short name abbreviation into the **Course Short Name** field.
5. Click in the **Course Code** field.
 - Enter the course code information into the **Course Code** field. (It is recommended that the course code begins with the state agency acronym.)
6. Confirm the **Owner** field is correct or click in the **Owner** Magnifying Glass button to search for a different course owner.

Owner Chelsie Benefiel

*Effective Date 01/24/2017 *Course Status Active
7. Click the **Course Status** drop-down menu button.
 - Select the correct Course Status from the list of values.
 - i. Select **Active** when the course is ready for use.
 - ii. Select **Inactive** for courses no longer in use.
 - iii. Select **Pending** while developing a new course.
8. Confirm the date in the **Effective Date** field is correct.
9. Enter the course description into the **Description** field.

This field is limited in the number of characters that may be used. For detailed course descriptions, use the **Course Abstract** field.

10. Click in the **Course Abstract** field.
 - Enter a more detailed course description into the **Course Abstract** field.

*Description	The interactive class is designed to define and sharpen your basic communication skills. Problems and solution to everyday situations that lead to communication breakdown will be discussed.
	254 characters remaining
Course Abstract	The interactive class is designed to define and sharpen your basic communication skills. Problems and solution to everyday situations that lead to communication breakdown will be discussed.

11. Click the **Approval Type** drop-down menu button.
 - Select the correct Approval Type from the list of values.
 - i. Select **Both-Special** when both the learner's manager/supervisor AND the course administrator enrollment approval is required.
 - ii. Select **None** when no enrollment approval is required and the learner may self-enroll.
 - iii. Select **Standard** when the learner's manager/supervisor ONLY is required to approve enrollment.

12. Confirm the **Offering** button option **Internal** is selected.

All courses created, owned, and hosted and/or delivered by the State of Indiana are **Internal** courses.

13. Enter the number of education units earned for the course in the **Education Units** field, if applicable.

This field is for documentation purposes only.

14. Enter estimated course costs into the **Estimated Cost** field, if desired.

The cost value can be used to calculate forecasted training costs when training plan budgets are produced. The **Estimated Cost** field represents the estimated cost, per learner, of delivering the class and can be overridden at the delivery method level.

15. If an estimated cost was entered into the **Estimated Cost** field, confirm the **Currency Code** field is correct.

16. Check the **Enable Learning Request** checkbox to allow learners to choose the course when submitting a learning request.

17. Click in the **Learning Request Threshold** field.

- Enter a learning request threshold number into the Learning Request Threshold field to specify how many course requests must be made before the administrator is notified.

18. The **Enable Learning Request** checkbox must be checked for administrator notification to occur.

19. Click the **Prerequisites** link.



20. Click the **Add required Prerequisites** link to add prerequisites, as desired.

Prerequisite courses should be selected and entered. Administrators can override prerequisites for learners. Managers cannot override prerequisites for a learner directly but may use the supplemental learning page to give learners waivers on courses.

Required Prerequisites are mandatory prior to the completion of another course and prevent the learner from enrolling into advanced classes until completed.

Recommended Prerequisites are not mandatory and do not prevent the learner from enrolling into a class.

When entering prerequisites, the **Relationship** drop-down menu field list of values need to be set correctly. Values include:

- Select **End** if this is the last prerequisite.
- Select **And** if there are additional prerequisites.
- Select **Or** if a prerequisite can be met by completed the next prerequisite entered.

Important! The system ignores any prerequisites that are listed after *End*.

21. Click the **Equivalents** link.

If another course is considered to be the equivalent of this one, select the equivalent course. The system does not perform any checks to determine if equivalent courses have the same objectives.

22. Click the **Notes and Attachments** link.

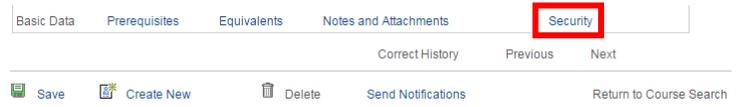
23. Check the **Display in Catalog** checkbox for course notes and/or attachments to appear in the catalog.

24. Click in the **Notes** field.

- Enter course related notes into the **Notes** field as needed.

25. Add attachments to a course by clicking the **Add Attachment** button, if desired. (Remove attachments by clicking the Delete Attachment button.)

26. Click the **Security** link.



27. Confirm the correct learning

environment is showing in the **Learning Environment** section.

A course must be associated with at least one learning environment. The system displays the administrator's current learning environment as the default. If more than one learning environment exists and a learning environment is removed, the primary learning environment automatically defaults to a remaining learning environment. The primary learning environment can be changed at any time.

28. Click the **Add Learner Group Security** link.

29. Click the **Learner Group Magnifying Glass** button to search for learner groups.



Learner group security specifies which learner groups can access classes and programs within a category when browsing or searching the catalog.

If a learner group is not assigned, the related classes will not appear in the catalog.

30. Enter search criteria for the learner group.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

31. Click the **Look Up** button.

32. Select the correct learner group from the list of values.

33. After all learner groups have been entered, click the **Done** button.

Learner Groups		Personalize Find [?] []	First	1-2 of 2	Last
Name	Learning Environment	Status	*Relationship		
ELM Support	Core Learning Activities	Active	or	+	-
All Learners	Core Learning Activities	Active	end	+	-

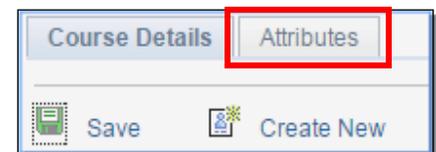
Done

When entering learner group security **for multiple learner groups**, the **Relationship** drop-down menu field list of values need to be set correctly to specify how one learner group is related to others in the list when used to determine whether or not a person has access. Values include:

- Select **And** if a learner must be a member of both this learner group and the next in the list.
- Select **Or** if a learner must be in this learner group or the next in the list.
- Select **End** as a placeholder for the last learner group in the list.

Important! The system ignores any learner groups that are listed after *End*.

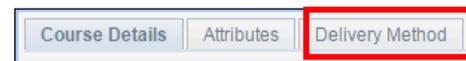
34. Click the **Attributes** tab.



35. Click the **Add Category** link.

The **Course Attributes** category specifies which category a course is to be listed in the learning catalog. **If a category is not assigned, the related courses and classes will not appear in the catalog.**

36. Click the **Category Magnifying Glass** button to locate the category to which the course belongs.
37. Select the correct category from the list of values in the Long Name column. If necessary, enter search criteria to locate the category.
38. Click the **Save** link.
39. Click the **Delivery Method** tab.
40. Click the **Add New Delivery Method** button.



Delivery methods define how course offerings are presented to learners (for example, through online learning, classroom instruction, seminars, books, etc.) within the organization. Learners can search the catalog for offerings by the delivery method that best suits their learning style.

Delivery methods are created for courses to identify the specific methods the course's classes are offered. The same course may have multiple delivery methods. There are no restrictions on how many delivery methods can be defined or how they are named.

41. Confirm the course code is correct in the **Course Code** field.

42. Click the **Delivery Method Type Magnifying Glass** button.
43. Select the correct delivery method from the list of values in the Long Name column.
44. Confirm the effective date in the **Effective Date** field is correct.
45. Click the **Status** drop-down menu button.
 - Select **Active** when the delivery method is ready for use.
 - Select **Inactive** for delivery methods being prepared for use or are no longer in use.
46. Click the **Frequency** drop-down menu button.
 - Select the frequency the class is usually offered via the delivery method from the list of values.

47. Click the **Administrator Magnifying Glass** button to select an enrollment administrator.
48. Enter search criteria for the administrator.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria needs to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features assists with narrowing the search for specific data and/or assist with setting search parameters.

49. Click the **Look Up** button.
50. Select the correct **Administrator** from the list of values. 
51. Enter the cost of offering the class in the **Cost** field, if applicable.
52. Click the **Primary Instructor Magnifying Glass** button to locate a primary instructor for the delivery method, if applicable.
53. Enter search criteria as needed and click the **Search** button.
54. Select an instructor entry from the list of values in the **Name Display** column.
55. Confirm the owner of the course or click in the **Owner Magnifying Glass** button to change the owner.
56. Enter any payment information into the **Payments - Pricing and Training Units** sections.

The **Payments** section contains **pricing** and **training unit** information associated with the delivery method of a course. Selections made in either the **Pricing** section or the **Training Units** section can be overridden for adjustments at the class level as needed.

Pricing fields include:

- **Internal Price** - The price to charge internal learners to enroll into course classes. Internal learners are learners who are tracked in PeopleSoft HR as employees, contingent (contract) workers, or persons of interest (board members, external instructors, etc.)
- **Internal Drop Charge** - The amount to charge internal learners for dropping classes after the **drop period**.
- **External Price** - Not used.
- **External Drop Charge** - Not used.

Training Units fields include:

Not used - training units only apply to external learners.

57. Enter any estimated cost information into the **Estimated Cost** section.

The entered **Estimated Cost** values can be used to calculate forecasted learning costs when training plan budgets are produced that includes classes with this delivery method.

Estimated Cost fields include:

- **Estimated Cost** - The default value appearing in the delivery method estimated cost is inherited from the course. It represents the estimated cost, per learner, of delivering the class. The system uses the cost entered here to determine the forecasted cost for the class. This does not include any hourly costs.
- **Hourly Cost** - The default value appearing in the delivery method hourly cost is inherited from the administrator's learning environment. Enter the estimated hourly cost, per learner, of delivering the class. The system uses the cost entered here to determine the forecasted cost for a class based on the number of hours defined for each of the classes' components on the recommended duration page.

58. Enter any learning period information into the **Learning Period** section.

The **Learning Period** fields are used most often for classes with **web-based, test, survey, or assignment delivery method learning components only**. The selections made here may be overridden at the class level.

Learning Period fields include:

- **Learning Period** - The number of days after the enrollment date that learners must complete the class. If the learner has not received a completion status of either '**Completed**' or '**Not Completed**' for a class, at the end of the learning period the **Auto Mark Class Completion** process will run changing the learner's status accordingly.
- **Warning Period Days** - The number of days before the end of the learning period that the system sends an email notifying the learner that the learning period is about to expire.

59. Enter any published duration information into the **Published Duration** section.

The **Published Duration** sections uses the **Days, Hours, and Minutes** fields to estimate how long classes should take using the identified delivery method. The values entered here become default values within the **Class Details** page.

Duration is not related to learning period. Duration is the amount of time the class should actually take to complete, whereas the learning period is the amount of time the learner has to complete the class. Most often the learning period will be longer than the duration.

60. Enter any enrollment information into the **Enrollment** section.

Enrollment fields include:

- **Max Enrollment** (maximum enrollment) - The maximum number of learners that can enroll into a class. This number can be overridden at the class level.
- **Min Enrollment** (minimum enrollment) - The minimum number of learners that should enroll in the class for the class to be held. If this minimum number is not met before a pre-defined number of days prior to the start of the class, then the Minimum Enrollment Met Alert notification is sent to the class administrator. This number can be overridden at the class level.
- **Average Fill Rate** - The average number of learners who enroll in the class each time the class is offered. This field is informational only.
- **Enforce Enrollment Limit** - Check the checkbox to have the system prevent learners from enrolling in this class after the maximum enrollment number is reached. To have the system generate a waiting list for this class, you must select this checkbox. This option can be overridden at the class level.

61. Enter any waitlist information into the **Waitlist** section.

The **Waitlist** fields may be overridden at the class level.

Waitlist fields include:

- **Enable Waitlist** - Check this checkbox to have the system accept wait-listed learner(s) once maximum enrollment is reached.
- **Waitlist Capacity** - The maximum number of learners that can be placed on the waiting list. If a learner attempts to enroll in a class that has a full waiting list, the system displays a message to indicate that the class is full.
- **Waitlist Threshold** - The maximum number of learners that can be waitlisted. The administrator for the primary learning environment is notified if this value is exceeded.

62. Enter any grades and attendance information into the **Grades and Attendance** section.

The **Grades and Attendance** fields may be overridden at the class level.

Grades and Attendance fields include:

Auto Mark Completion - Check this checkbox to have the system automatically mark attendance at the completion of the class.

Mark Completion After - If the **Auto Mark Completion** is selected, enter the number of days after the class end date that the system should mark attendance.

Launchable from History - Check this checkbox to have the links associated with **web-based, test, or survey learning components** to be launchable from the learner's **All Learning** page. If checked, the learner will always be able to launch the content even after the class achieves a completion status of 'Completed' or 'Not Completed'. **This checkbox must be checked if the Allow Completion from History checkbox is checked.**

Allow Completion from History - Check this checkbox to have learners be able to complete classes with **web-based, test, or survey learning components** to be launchable from the learner's **All Learning** page. This allows a learner to review or test a course as many times as needed. If the **Launchable from History** checkbox is checked and this checkbox is not checked, then learners can launch the content from the **All Learning** page **but their progress will not be updated and no changes will be made to the classes' completion or passing status.**

63. Enter any technical requirements (such as plug-ins or a microphone) for this class into the **Technical Requirements** field.

- The system does not display this information to learners.

64. Click the **Save** link.

- To enter *additional* delivery methods for a course, click the **Create New** link.

65. To review a list of course classes or enter classes for a course, click the **Classes** tab.



66. Click the **Add New Class** button to add new course classes.



Lesson 5 - Create/Update Delivery Method

Procedure

Delivery methods define how course offerings are presented to learners (for example, through online learning, classroom instruction, seminars, books, etc.) within the organization. Learners can search the catalog for offerings by the delivery method that best suits their learning style.

Delivery methods are created for courses to identify the specific methods the course's classes are offered. The same course may have multiple delivery methods. There are no restrictions on how many delivery methods can be defined or how they are named.

This lesson teaches administrators how to create or update delivery methods.

1. Select **Enterprise Learning>Catalog>Maintain Delivery Methods**
2. Enter search criteria to update an existing delivery method or click the **Add a New Value** tab to create a new delivery method.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

3. Click the **Course Code** Magnifying Glass button.

4. Enter search criteria for the course code or course.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features assists with narrowing the search for specific data and/or assist with setting search parameters.

5. Click the **Look Up** button.
6. Select the correct course from the list of values.
7. Click the **Delivery Method** Magnifying Glass button.
8. Enter search criteria or select a delivery method type from the list of values.
9. Confirm the effective date in the **Effective Date** field is correct.
10. Confirm the delivery method status in the **Status** field is correct.
11. Select the correct frequency in the **Frequency** field from the list of values.
12. Click the **Administrator** Magnifying Glass button.
13. Enter search criteria to locate an enrollment administrator.



To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features assists with narrowing the search for specific data and/or assist with setting search parameters.

14. Click the **Look Up** button.
15. Select the correct administrator from the list of values.
16. Confirm or enter a primary instructor in the **Primary Instructor** field, if applicable.
17. Confirm or enter the delivery method owner in the **Owner** field.
18. Enter any payments information into the **Payments** section.

The **Payments** section contains **pricing** and **training unit** information associated with the delivery method of a course. Selections made in either the **Pricing** section or the **Training Units** section can be overridden for adjustments at the class level as needed.

Pricing fields include:

- **Internal Price** - The price to charge internal learners to enroll into course classes. Internal learners are learners who are tracked in PeopleSoft HR as employees, contingent (contract) workers, or persons of interest (board members, external instructors, etc.)
- **Internal Drop Charge** - The amount to charge internal learners for dropping classes after the **drop period**.
- **External Price** - Not used.
- **External Drop Charge** - Not used.

Training Units fields include:

Not used - training units only apply to external learners.

19. Enter any estimated cost information into the **Estimated Cost** section.

The entered **Estimated Cost** values can be used to calculate forecasted learning costs when training plan budgets are produced that includes classes with this delivery method.

Estimated Cost fields include:

- **Estimated Cost** - The default value appearing in the delivery method estimated cost is inherited from the course. It represents the estimated cost, per learner, of delivering the class. The system uses the cost entered here to determine the forecasted cost for the class. This does not include any hourly costs.
- **Hourly Cost** - The default value appearing in the delivery method hourly cost is inherited from the administrator's learning environment. Enter the estimated hourly cost, per learner, of delivering the class. The system uses the cost entered here to determine the forecasted cost for a class based on the number of hours defined for each of the class components on the recommended duration page.

20. Enter any learning period information into the **Learning Period** section.

The **Learning Period** fields are used most often for classes with **web-based, test, survey, or assignment delivery method learning components only**. The selections made here may be overridden at the class level.

Learning Period fields include:

- **Learning Period** - The number of days after the enrollment date that learners must complete the class. If the learner has not received a completion status of either '**Completed**' or '**Not Completed**' for a class, at the end of the learning period the **Auto Mark Class Completion** process will run changing the learner's status accordingly.
- **Warning Period Days** - The number of days before the end of the learning period that the system sends an email notifying the learner that the learning period is about to expire.

21. Enter any published duration information into the **Published Duration** section.

The **Published Duration** sections uses the **Days, Hours, and Minutes** fields to estimate how long classes should take using the identified delivery method. The values entered here become default values within the **Class Details** page.

Duration is not related to learning period. Duration is the amount of time the learning class should actually take to complete, whereas the learning period is the amount of time the learner has to complete the class. Most often the learning period will be longer than the duration.

22. Enter any enrollment information into the **Enrollment** section.

Enrollment fields include:

- **Max Enrollment** (maximum enrollment) - The maximum number of learners that can enroll into a class. This number can be overridden at the class level.
- **Min Enrollment** (minimum enrollment) - The minimum number of learners that should enroll in the class for the class to be held. If this minimum number is not met before a pre-defined number of days prior to the start of the class, then the Minimum Enrollment Met Alert notification is sent to the class administrator to inform them. This number can be overridden at the class level.
- **Average Fill Rate** - The average number of learners who enroll in the class each time the class is offered. This field is informational only.
- **Enforce Enrollment Limit** - Check the checkbox to have the system prevent learners from enrolling in this class after the maximum enrollment number is reached. To have the system generate a waiting list for this class, you must select this checkbox. This option can be overridden at the class level.

23. Enter any waitlist information into the **Waitlist** section.

The **Waitlist** fields may be overridden at the class level.

Waitlist fields include:

- **Enable Waitlist** - Check this checkbox to have the system accept wait-listed learner(s) once maximum enrollment is reached.
- **Waitlist Capacity** - The maximum number of learners that can be placed on the waiting list. If a learner attempts to enroll in a class that has a full waiting list, the system displays a message to indicate that the class is full.
- **Waitlist Threshold** - The maximum number of learners that can be waitlisted. The administrator for the primary learning environment will be notified if this value is exceeded.

24. Enter any grades and attendance information into the **Grades and Attendance** section.

25. Enter any technical requirements (such as plug-ins, a microphone, or a connection speed) for this class into the **Technical Requirements** field.

- a. The system does not display this information to learners.

26. Click the **Save** link.

Lesson 6 - Create/Update Instructor Led Training (ILT) Class

Classes are instances or offerings of a course. Classes are comprised of learning components. Learning components represent how the instructional content of the class is delivered to the learners. For example, learning components can be instructor-led and scheduled, or they can be web-based (computer-based) and self-paced. Classes contain at least one learning component, but they could contain as many as needed to reach the learning objectives of the class.

It is recommended the following naming convention is used for class creation:

Classes (sessions) should begin with the State agency acronym and followed by additional naming convention criteria established by the agency. For example, if the SPD wishes to create a class (session) for the courses listed above, in addition to the numbering system established and maintained for the courses, an extension may be added to identify the class. A class naming convention may look like: **SPD_00051_120109**. The last segment of the class may identify the **date** the class is offered for the course.

This lesson teaches administrators how to create and/or update an instructor-led catalog class.

1. Select **Enterprise Learning>Catalog>Maintain Classes**
2. Enter search criteria to update an existing class or click the **Add a New Value** tab to create a new class.
3. Click the **Delivery Method ID** Magnifying Glass button.
4. Enter search criteria for the correct delivery method ID.



To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:
 Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

5. Click the **Look Up** button.
6. Select the correct **Delivery Method Type** from the list of values.
7. Click the **Add** button.
8. Click in the **Class Code** field.
9. Enter a class code into the **Class Code** field.
 - It is recommended the class code begin with the State agency acronym followed by additional naming convention criteria established by the agency.)



The class code appears on the course catalog and during registration and is used by administrators, instructors, and learners to identify specific classes.

10. Confirm or change the date in the **Start Date** field.



The start date is the first day learners can launch content from classes that contain **web-based (computer-based), survey and test learning components**.

The system uses this date to determine when to send class reminders if a value is entered in the **Send Reminder** field. The system also uses this value to determine when to send the minimum enrollment notification if a value is entered in the **Min Enroll Days** field to determine the last date a learner can drop the class without incurring drop charges if a value is entered in the **Last Drop** field.

11. Enter an end date into the **End Date** field.

The end date is the last day learners can launch content from classes that contain **web-based (computer-based), survey and test learning components**.

The end date is also the last date learners can enroll in the class, unless the last enrollment date set for the class comes first. In addition, the class end date triggers the **Auto Mark Class Completion** process if the **Auto Mark Completion** checkbox is checked.

12. Click the **Approval Type** drop-down menu

13. Click the **Approval Type** drop-down menu button.

- Select the correct Approval Type from the list of values.
 - i. Select **Both-Special** when both the learner's manager/supervisor AND the course administrator enrollment approval is required.
 - ii. Select **None** when no enrollment approval is required and the learner may self-enroll.
 - iii. Select **Standard** when the learner's manager/supervisor ONLY is required to approve enrollment.



14. If catalog administrator approval is needed in addition to manager/supervisor approval, click the **Catalog Approver** Magnifying Glass button to search for a catalog approver.

15. Enter search criteria for the catalog approver.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

16. Click the **Look Up** button.

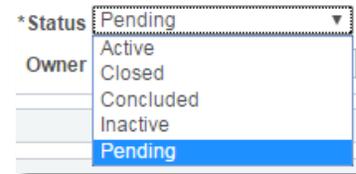
17. Select an entry from the list of values.

18. Confirm or change the enrollment administrator in the **Administrator** field.

Administrator

19. Confirm or change the primary instructor for the class in the **Primary Instructor** field.

20. Click the **Status** drop-down menu



21. Select the correct status from the list of values.

Set the status of the class. The status of the class impacts enrollment in the class. Values include:

- **Active** classes appear in the learning catalog and learners can self-enroll into the class.
- **Closed** classes are closed to appear in the learning catalog for learners in self-service but learners cannot self-enroll. Whenever a class is closed, only administrators can enroll learners into that class.
- **Concluded** classes do not appear in the learning catalog for learners to view or enroll in through self-service. Concluded classes are available to administrators and they can enroll learners into this class and mark completions statuses manually.
- **Inactive** classes do not appear in the learning catalog for learners to view or enroll in through self-service. When a class becomes inactive, all enrollments (except for those that are completed or incomplete) are automatically dropped, and an email notification is sent to all the learners whose enrollments are dropped.
- **Pending** is the default for classes when they are first created. Pending classes can be viewed and managed by administrators but cannot be viewed or enrolled in by learners through self-service.

Classes with **Active**, **Closed**, or **Concluded** statuses **without learning components** cannot be saved.

22. Enter the number of education units earned for the course in the **Education Units** field, if applicable.

23. Confirm or change the class owner in the **Owner** field.

The owner is the person who is notified when the minimum enrollment is not met for a class. By default, the system displays the name of the administrator who creates the class.

The **Owner** field works in conjunction with the **Min Enrollment** field and the **Min Enroll Days** field.

24. Enter any pricing or training unit information into the **Payments** section.

The **Payments** section contains **pricing** and **training unit** information associated with the delivery method of a course. Selections made in either the **Pricing** section or the **Training Units** section can be overridden for adjustments at the class level as needed.

Pricing fields include:

- **Internal Price** - The price to charge internal learners to enroll into course classes. Internal learners are learners who are tracked in PeopleSoft HR as employees, contingent (contract) workers, or persons of interest (board members, external instructors, etc.)
- **Internal Drop Charge** - The amount to charge internal learners for dropping classes after the **drop period**.
- **External Price** - Not used.
- **External Drop Charge** - Not used.

Training Units fields include:

Not used - training units only apply to external learners.

25. Enter any learning period information into the **Learning Period** section.

The **Learning Period** fields are used most often for classes with **web-based, test, survey, or assignment delivery method learning components only**. The selections made here may be overridden at the class level.

Learning Period fields include:

- **Learning Period** - The number of days after the enrollment date that learners must complete the class. If the learner has not received a completion status of either '**Completed**' or '**Not Completed**' for a class, at the end of the learning period the **Auto Mark Class Completion** process runs changing the learner's status accordingly.
- **Send Warning** - The number of days before the end of the learning period that the system sends an email notifying the learner that the learning period is about to expire.

26. Enter any published duration information into the **Published Duration** section.

The **Published Duration** sections uses the **Days, Hours, and Minutes** fields to estimate how long classes should take using the identified delivery method. The values entered here become default values within the **Class Details** page.

Duration is not related to learning period. Duration is the amount of time the learning class should actually take to complete, whereas the learning period is the amount of time the learner has to complete the class. Most often the learning period will be longer than the duration.

27. Confirm or uncheck the **Display Start and End Date** checkbox as required.

Check the **Display Start and End Date** checkbox to display the class start and end date to learners. **The default for this field is checked.**

Clear this field to display "--" to learners in enrollment notifications and in the class header on the **Class Detail** and progress pages. Learners also see "**Anytime**" in the **Start Date** column on the **Class Name** page.

Uncheck this field if displaying a start date would be confusing to learners, such as for a self-paced class.

28. Enter any class start reminder information into the **Start Reminder** section.

Start Reminder fields include:

Send Reminder - The number of days from the class start date an email is sent to learners and instructors reminding them about the start of the class. Alternatively, a particular date can be specified for the reminder to be issued in the **Reminder Date** field.

Reminder Date - The date an email is sent to learners and instructors reminding them about the start of a class. Alternatively, the number of days before the start date to send a reminder can be entered into the **Send Reminder** field.

Reminder Template - Select an email template to deliver the default reminder message.

29. Enter any class enrollment information into the **Enrollment** section.

Enrollment fields include:

Max Enrollment (maximum enrollment) - The maximum number of learners that can enroll into a class. When this number has been reached, the system closes the class to further enrollment unless overbooking and/or waitlisting is permitted. If overbooking and/or waitlisting is permitted, learners will continue to be enrolled up to the overbook percentage. This field is populated by default from the **Delivery Method** page.

Enrollment Total - Displays the number of learners who have successfully enrolled in the class. The total reduces if enrollments are cancelled or postponed. The enrollment process keeps this field updated automatically.

Total Open Enrollment - Displays the total amount of seats that are currently available for enrollment. The enrollment process keeps this field updated automatically.

Min Enrollment (minimum enrollment) - The minimum number of learners that should enroll in the class for the class to proceed. This field is populated by default from the **Delivery Method** page.

Min Enroll Days (minimum enrollment days) - The number of days before the class start date for the minimum enrollment notification is sent to the enrollment administrator and class owner to alert them the minimum enrollment has not been reached. This notification gives the administrator and owner an opportunity to cancel the class due to low enrollment.

Overbook - The percentage above the maximum enrollment value that will allow enrollment. The overbook value, multiplied by the maximum enrollment number, is the total number of enrollments that the system accepts before the system assigns the waitlist status to a learner attempting to enroll into the class.

Reserved Seats - The number of seats available in reserve. Only the class administrator can enroll learners into reserved seats. Use this field to reserve seats for groups of learners without naming specific learners. The number of reserved seats can be revised at any time.

Reserve Seats for – The area which seats are being reserved. Seats can be reserved for Department or Organization.

Last Enroll Days (last enrollment) - The number of days *Before the Start Date* or *After the Start Date* drop-down menu options indicating the last day enrollment is permitted. Days can be set in this field or a specific date may be used in the *Last Enroll Date* (last enrollment date) field. This field is useful to close enrollments to accommodate the ordering of materials for a class, for example.

Last Enroll Date (last enrollment date) - The date representing the last day enrollment into the class is permitted. Alternatively, the number of day before or after the class start date learners can enroll in the *Last Enroll* field or the last enroll date can be set at the class start date by selecting the *Last Enroll Date = Start Date* checkbox.

Last Enroll Date = Start Date - Check the checkbox to have the last day learners can enroll in the class to equal the class start date. Alternatively, a last enrollment date may be entered in the *Last Enroll Date* field or the number of days before or after a class start date learners may enroll can be specified in the *Last Enroll* field.

Enforce Enrollment Limit - Check the checkbox to have the system prevent learners from enrolling in this class after the maximum enrollment number is reached. To have the system generate a waiting list for this class, you must select this checkbox. Uncheck the checkbox if there is no maximum enrollment limit.

Restrict to Programs - Not used.

30. Enter any class waitlist information into the **Waitlist** section.

Waitlist fields include:

Enable Waitlist - Check this checkbox to have the system accept wait-listed learner(s) once maximum enrollment is reached. If overbooking is permitted, the system does not waitlist learners until the overbook percentage is reached.

Waitlist Capacity - The maximum number of learners the system can put on the waitlist. The system populates this field by default from the *Delivery Method* page.

Waitlist Total - Displays the number of learners on the class waitlist. The enrollment process automatically increases or decreases this number as learners are added to or removed from the waitlist.

Waitlist Threshold - The number of learners on the waitlist to send a notification to the administrator.

31. Enter any drop class information into the **Drop Class** section.

Drop Class fields include:

Last Drop Days - The number of days *Before the Start Date* or *After the Enrollment Date* drop-down menu options the learner can drop the class. Alternatively, a specific date may be used in the *Last Drop Date* field.

Last Drop Date - The date until a learner can drop the class without paying a drop fee.

Last Drop Date = Start Date - Check this checkbox if the last day learners can drop the class without having to pay a drop fee to equal the class start date.

32. Enter any grades and attendance information into the **Grades and Attendance** section.

Grades and Attendance fields include:

Auto Mark Completion - Check this checkbox to have the system automatically update completion statuses at the completion of a class. The rules for marking attendance depend upon the learning components within the class. The system populates this field by default from the *Delivery Method* page.

Launchable from History - Check this checkbox to have the links associated with **web-based, test, or survey learning components** to be launchable from the learner's **All Learning** page. If checked, the learner will always be able to launch the content even after the class achieves a completion status of 'Completed' or 'Not Completed'. The system populates this field by default from the **Delivery Method** page. **This checkbox must be checked if the Allow Completion from History checkbox is checked.**

Enforce Prerequisites - Check this checkbox to have the enrollment process to enforce required class prerequisites. If the checkbox is not checked, the classes requiring prerequisites will not be enforced during enrollment. Administrator can still override prerequisites for individual learners even if the checkbox is checked but Managers cannot. Managers may use the **Supplemental Learning** page to give learners waivers of courses.

Mark Completion After - If the **Auto Mark Completion** is checked, enter the number of days after completion of the class that the system automatically updates the attendance and passing statuses. If the value is 0, the system updates the attendance records on the completion date. The system populates this field by default from the **Delivery Method** page.

Allow Completion from History - Check this checkbox to have learners be able to complete learning classes with **web-based, test, or survey learning components** to be launchable from the learner's **All Learning** page. This allows a learner to review or test a course as many times as needed. If the **Launchable from History** checkbox is checked and this checkbox is not checked, then learners can launch the content from the **All Learning** page **but their progress will not be updated and no changes will be made to the class's completion or passing status.**

33. Confirm/change any learning environment information into the **Learning Environments** section.

A class must be associated with at least one learning environment. The system displays the administrator's current learning environment as the default. If more than one learning environment exists and a learning environment is removed, the primary learning environment will automatically default to a remaining learning environment. The primary learning environment can be changed at any time.

34. Click the **Default Learner Groups** button.



A **Learner Group** identifies learners who will complete training together. Learner groups can be created by Business Unit, individual Learner ID, Job Codes, etc.

One of the primary functions of a learner group is to control access to the learning catalog. For a user to access a particular class (session) in the catalog, the user must belong to a learner group that is assigned to the **class** (session), the **course**, and the **category** (State agency) that's associated with the course.

Learner group data is defined by associating a Learner Group with a **Learning Environment and owner** (administrator). Learning environments control which parts of the catalog an administrator can view and update, as well as the default values and options that are associated with the objects (such as categories, courses, classes, and programs). The learning environment also enables administrators to access the instructors and resources that are available for assignment.

35. Confirm the learner group(s) populated correctly. To add additional learner groups, click the **Edit Learner Group Security** link.

Learner group security specifies which learner groups can access classes and programs within a category when browsing or searching the catalog.

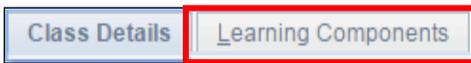
If a learner group is not assigned, the related classes will not appear in the catalog.

When entering learner group security **for multiple learner groups**, the **Relationship** drop-down menu field list of values need to be set correctly to specify how one learner group is related to others in the list when used to determine whether or not a person has access. Values include:

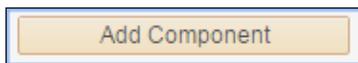
- Select **And** if a learner must be a member of both this learner group and the next in the list.
- Select **Or** if a learner must be in this learner group or the next in the list.
- Select **End** as a placeholder for the last learner group is the list.

Important! The system ignores any learner groups that are listed after *End*.

36. Click the **Learning Components** tab



37. Click the **Add Component** button.



The **Add Component** button allows a learning component to be added to a class.

Clicking the **Edit** link will allow updates to existing learning components.

Every class must have at least one learning component to be marked as an Active class.

38. Select a component type from the list of values in the **Component Type** column.

39. Enter the class title into the **Component Name** field.

40. Enter a class title abbreviation into the **Short Name** field.

41. Enter the class description into the **Description** field.

42. Enter any class notes into the **Notes** field.

43. Click the **Patterns** tab.



44. Click the **Facility** Magnifying Glass button.
45. Search for or select the training facility from the list of values in the **Description** column.
46. If the facility has more than one training room, click the **Room** Magnifying Glass button to select the correct room from the list of values.

47. Enter the session start date into the **Start Date** field.

One class may have several sessions. **The start date of the session may not necessarily be the start date of the class.** Multiple sessions within a class are assigned individual session ID numbers to assist with reporting needs.

48. Enter the number of sessions to be created into the **Create** field.

The system does not create any sessions if a number is not entered into the session Create field.

The number of sessions and checking the checkboxes for the correct days of the week helps the system identify repeating session patterns. The session pattern tells the system on which days it can schedule sessions and when to stop repeating the pattern. For example:

If the number of sessions entered is 10 and the class would repeat on Tuesday and Wednesday (determined by checking the checkboxes), the class would repeat every Tuesday and Wednesday for five weeks.

49. Enter the start time of the session(s) into the **Start Time** field.
50. Enter the end time of the session(s) into the **End Time** field.
51. Confirm or change the time zone in the **Time Zone** field.
52. Check the correct checkbox day(s) for the session(s) to be held.
53. Click the **Add Instructor** link.
54. Click the **Instructors section Name Display** Magnifying Glass button.
55. Enter search criteria for the instructor.
56. Click the **Search** button.
57. Select the correct instructor from the list of values in the **Name Display** column.
58. Click the **Type** drop-down menu button.

59. Select the correct instructor **Type** from the list of values.
- Coach for a training collaborator but not training delivery.
 - External for a vendor training delivery.
 - Facilitator for training communications or problem-solving but not training delivery.
 - Mentor for training counseling or guidance but not training delivery.
 - Primary for internal instructor training delivery.

60. Click the **Add Instructor** link to add additional instructors and types.

61. Click the **Add Equipment** link to add any needed equipment for the session.

62. Check the **Observe Holidays** checkbox to observe the holiday schedule linked to the selected facility for the session.

63. Check the **Delete Existing Sessions** checkbox, if desired.

Observe Holidays Delete Existing Sessions

Check the **Delete Existing Sessions** checkbox to delete any previously built sessions. Leaving the checkbox unchecked allows the system to add any new sessions to be built to existing sessions.

64. Click the **Build Sessions** button.

Class session scheduling information does not appear in the learning catalog unless the Build Sessions and Add Session buttons are clicked.

While the class may be viewed while searching and browsing the catalog, **scheduled sessions do not appear** upon clicking the class **View Details** link, then the **Schedule** link. When scheduled sessions do not appear upon clicking the **Schedule** link, learners receive a default message of, "There are no scheduled sessions for this class" which may be confusing for learners wishing to enroll into a class session.

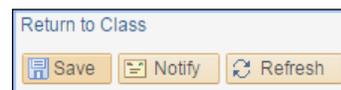
The system does not allow sessions falling outside of the class start and end dates to be built.

65. Check the checkboxes to the left of the sessions to be built in the **Sessions** section.

66. To add the checked session(s), click the **Add Session** button.

67. To remove checked session(s), click the **Delete Session** button.

68. Click the **Return to Class** link.



69. Click the **Completion** button.

70. Check the **Enforce Component Order** checkbox, if desired.

Enforce Component Order

Class Components							Personalize	Find	First	1 of 1	Last
Required	*Order	Type	Name	Duration	Passing Required	Score					
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Sessions	9.0 ELM Administration	Set Duration	<input checked="" type="checkbox"/>	<input type="text"/>					
						Previous	Next				

Check this checkbox to force learners to complete learning components in a set order as defined by the **Order** field. Left unchecked, the system does not prevent learners from starting and completing learning components out of order. By default, this field is unchecked.

71. Confirm or change class component information in the **Class Components** section as needed.

Class Components fields include:

Required - Check this checkbox if the learning component is required to complete the class. If the checkbox is unchecked, the learning component is optional for the learner. The system checks this checkbox by default.

Order - The numerical order the system lists the learning components for the learner on the **Class Progress** page. If the **Enforce Component Order** checkbox is checked, the system forces the learner to complete the learning components in the order established here. As one learning component is completed, the next learning component becomes available.

Set Duration - The **Set Duration** link allows access to the recommended duration page to enter the amount of time estimated to complete the learning component.

Passing Required - Check this checkbox to require learners to receive a passing status of **Pass** in order to successfully complete the learning component. If the checkbox is unchecked, the learner does not need to pass the component successfully to complete it.

Score - The minimum score a learner must achieve in the learning component to receive a passing status of **Pass**. Leaving this field blank indicates no passing score is needed.

72. Click the **Set Duration** link in the **Duration** column.

73. Enter the estimated class session duration into the **Days, Hours, and/or Minutes** fields as required.

74. Click the **OK** button.
75. Click the **Materials/Attachments** tab.
76. Enter any materials information into the **Material** section.

The **Materials Tab** allows the selection of materials, specification of quantities, setting the statuses of *Progress* or *Shipped*, and owner specification.

- Click the **Shipping** tab.
- Enter any shipping information on the **Shipping**

The **Shipping Tab** allows the entering of material shipping date, carrier, and tracking number information.

77. Enter any class related notes in the **Class Notes** section.

The **Class Notes** section permits any class related notes to be entered. This information would be information in addition to and separate from the class description or objectives.

Check the **Display Note to Learner** checkbox for the notes entered to appear to the learner on the **Course Detail** page and **Class Detail** page.

78. Add or remove any class attachments in the **Attachments** section.

To add attachments:

- Click the **Add** Attachment button.
- Click the **Browse** button to locate the file for attachment.
- Click the **Upload** button
- Enter a description in the **Description** field.
- Check the **Display** checkbox for display in the course catalog.

To remove existing attachments:

- Check the checkbox to the left of the attachment in the **Attached File** column.
- Click the **Delete Attachment** button.

79. Click the **Class Costs** tab.

The screenshot shows the 'Class Costs' interface. At the top, there are tabs for 'Summary' and 'Details'. Below this is a table with columns: 'Cost Category', 'Description', 'Cost', and 'Currency'. Below the table is a section for 'Ad hoc Costs and Credits' with a similar table structure, including a '*Type' dropdown menu. At the bottom, there is an 'Estimated Class Costs' section with input fields for 'Total Class Cost', 'Min Enrollment Cost', and 'Max Enrollment Cost', each with a 'USD' label and a 'Per Seat' label. A 'Calculate Costs' button is also present. Navigation buttons like 'First', '1 of 1', and 'Last' are visible at the top and bottom of the interface.

80. Review any class costs appearing in the **Class Costs** - Summary section, if the costing function is used.

Class Cost Summary system calculated cost fields include:

Cost Category and **Description** - Indicates what the cost is for. Categories include content, equipment, facility, instructor, material, and vendor - anything that has a cost associated with it.

Cost - the overall category cost.

81. Click the **Details** tab.

82. Review any class costs appearing the **Class Costs** - **Details** section, if the costing function is used.

Class Cost - Details system calculated cost fields include:

Cost Description - Allows you to distinguish the correct cost category. Categories include content, equipment, facility, instructor, material, and vendor - anything that has a cost associated with it.

Cost Type - the cost frequency: *Day, Fixed, Hour, Student, or Week*.

Unit Cost - the cost calculation of the cost type per each quantity unit.

Cost - the unit cost multiplied by each quantity unit to yield the total cost.

Class Cost - Details fields include:

Quantity - the number of an individual cost type. A value can be entered into this field for all cost types except for **Content** and **Vendor** which have a fixed quantity.

83. Enter any ad hoc class costs and credits in the **Ad hoc Costs and Credits** - Summary section, if the costing function is used.

84. Click the **Add Ad hoc Costs and Credits** link to add multiple costs or credits.

Ad hoc Costs and Credits - Summary fields include:

Type - Options are *Cost* or *Credit*.

Cost Category - category options include *Content, Equipment, Facility, Instr. Fee* (instructor fee), *Material, Other* and *Vendor*.

Description - when the *Other* or *Content* cost categories are selected, a description of the cost may be entered here.

Ad hoc Cost and Credits - Summary system calculated cost fields include:

Cost - the total cost based on the quantity and units on the **Details** tab.

85. Click the **Details** tab.

Class Costs

Summary

Details

86. Review any class costs appearing the **Ad hoc Costs and Credits - Details** section, if the costing function is used.

Ad hoc Costs and Credits - Details fields include:

Cost Type - cost frequency options are *Day, Fixed, Hour, Student* or *Week*.

Unit Cost - the unit cost corresponding to the unit type.

Ad hoc Cost and Credits - Details system calculated cost fields include:

Quantity - the quantity for the cost type of Fixed is always 1. The quantity for all other cost types would be the actual quantity.

Cost - the total cost based on the quantity multiplied by the unit cost.

87. Click the **Calculate Costs** button to populate the Estimated Class Cost section fields.

Calculate Costs

88. Review the **Estimated Class Cost** section fields.

89. Click the **Class Details** tab.

90. Click the **Status** drop-down menu button.

91. Select **Active** from the list of values to make the class visible to learners in the course catalog.

92. Click the **Save** link.

Lesson 7 - Clone a Class

ELM enables administrators to clone and modify existing learning classes for efficiency.

A cloned class has the same attributes as the original class with the exception of those attributes that must be different. For example, two classes can have the same class code with the same start and end dates, but different session information (dates, rooms, instructors, or equipment) must be defined for each class.

This lesson teaches administrators how to clone and update existing classes.

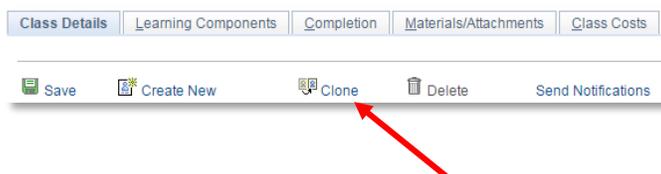
1. Click **Enterprise Learning>Catalog>Maintain Classes**
2. Enter search criteria to locate the existing class to be cloned.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

1. Click the **Search** button.
2. Select the correct class from the list of values.
3. Click the **Clone** link.
4. Change the class code in the **Class Code** field for the new class.



The class code appears on the course catalog and during registration and is used by administrators, instructors, and learners to identify specific classes.

5. Confirm or change the start date in the **Start Date** field.

The start date is the first day learners can launch content from classes that contain **web-based (computer-based), survey and test learning components**.

The system uses this date to determine when to send class reminders if a value is entered in the **Send Reminder** field. The system also uses this value to determine when to send the minimum enrollment notification if a value is entered in the **Min Enroll Days** field to determine the last date a learner can drop the class without incurring drop charges if a value is entered in the **Last Drop** field.

- If an end date is required, enter the class end date into the **End Date** field.

The end date is the last day learners can launch content from classes that contain **web-based (computer-based), survey and test learning components**.

The end date is also the last date learners can enroll in the class, unless the last enrollment date set for the class comes first. In addition, the class end date triggers the **Auto Mark Class Completion** process if the **Auto Mark Completion** checkbox is checked.

- Check the **Copy the Class Session Information** checkbox to copy session information for a scheduled class.

When the **Copy the Class Session Information** checkbox is checked, the system copies the exact session information - dates, rooms, instructors, and equipment - as the original class.

Access the **Sessions** page for the new class after you clone it to ensure that there are no scheduling conflicts.

- Click the **Continue** button.
- Confirm and/or change class information as required in the **General Information** section.
- Confirm and/or change pricing and training unit information as required in the **Payments** section.
- Confirm and/or change learning period information as required in the **Learning Period** section.

General Information	
*Start Date	02/16/2017
*Class Code	SPD_00057_Test
*Approval Type	Standard
Administrator	
*Status	Pending
Owner	
End Date	
*Language	English
Special Approver	
Primary Instructor	Amy Robinson
Reason	
Education Units	3.00

Payments	
Pricing	
*Currency Code	USD
Internal Price	0.00
External Price	0.00
Internal Drop Charge	0.00
External Drop Charge	0.00
Training Units	
Price	0.000
Drop Charge	0.000

Learning Period	
Learning Period Days	
Send Warning Days	

Published Duration	
Days	
Hours	3
Minutes	
<input checked="" type="checkbox"/> Display Start and End Date	

Start Reminder	
Send Reminder Days	0
Reminder Date	
Reminder Template	

- 12. Confirm and/or change published duration information as required in the **Published Duration** section.
- 13. Confirm and/or change class reminder information as required in the **Start Reminder** section.
- 14. Confirm and/or change class enrollment information as required in the **Enrollment** section.

For cloned classes, the system sets the **Enrollment Total**, **Total Open Enrollment**, and **Waitlist Total** field values to 0.

- 15. Confirm and/or change class waitlist information as required in the **Waitlist** section.
- 16. Confirm and/or change drop class information as required in the **Drop Class** section.

- 17. Confirm and/or change class grades and attendance information as required in the **Grades and Attendance** section.

The screenshot shows four sections of a class configuration page:

- Enrollment:** Max Enrollment (25), Total Open Enrollment (25), Min Enrollment (5), Overbook Percent (0), Reserve Seats for Last Enroll Days (1), Last Enroll Date, Enroll Total (0), Min Enroll Days (0), Reserved Seats (0), *Last Enroll Type (Before the Start Date), Enforce Enrollment Limit (checked), Restrict to Programs (unchecked), Last Enroll Date = Start Date (unchecked), Enable Program Auto Enrollment (unchecked).
- Waitlist:** Enable Waitlist (checked), Waitlist Capacity (35), Waitlist Threshold (35), Waitlist Total (0), Last Waitlist Enroll Date (02/16/2017).
- Drop Class:** Last Drop Days, Last Drop Date, *Last Drop Type (Before the Start Date), Last Drop Date = Start Date (checked).
- Grades and Attendance:** Mark Completion After Days (0), Auto Mark Completion (unchecked), Launchable from History (checked), Allow Completion from History (checked), Enforce Prerequisites (unchecked).

- 18. Confirm and/or change class learning environments as required in the **Learning Environments** section.

The screenshot shows the Learning Environments section with a table:

Learning Environment	Primary	Default Learner Groups
Core Learning Activities	<input checked="" type="checkbox"/>	Default Learner Groups

Below the table are links for '+ Add Learning Environment', 'Learner Groups' (with 'All Learners' listed), and 'Edit Learner Group Security'.

- 19. Confirm and/or change class learner groups as required in the **Learner Groups** section.

- 20. Click the **Learning Components** link.



- 21. Confirm and/or change class learning components as required in the **Class Learning Components** section.

- 22. Click the **Edit** link in the edit column to update existing component and session information.

23. Confirm and/or change learning component basic data information as required in the **Basic Data** section.

24. Confirm and/or change learning component notes information as required in the **Notes** section.

25. Click the **Session Patterns** tab.

26. Confirm and/or change session facility information as required in the **Facility** field.

27. Confirm and/or change session facility room information as required in the **Room** field, if applicable.

28. Confirm and/or change the session start date as required in the **Start Date** field.

The screenshot displays two sections of a web form. The top section, titled 'Basic Data', contains the following fields: '*Component Name' with the value 'Effective Communications', '*Short Name' with the value 'Effective', 'Description' with the text 'An interactive class designed to define and sharpen your communication skills', 'Provider Type' as a dropdown menu, and 'Provided By' as a search field. The bottom section, titled 'Notes', contains a text area with the text 'Open to all state employees Target Competencies include Communication Facilitated by Len Gritzer' and a character count of '157 characters remaining'.

One class may have several sessions. **The start date of the session may not necessarily be the start date of the class.** Multiple sessions within a class are assigned individual session ID numbers to assist with reporting needs.

29. Confirm and/or change the number of class sessions as required in the **Create** field.

The system will not create any sessions if a number is not entered into the session Create field.

The number of sessions and checking the checkboxes for the correct days of the week helps the system identify repeating session patterns. The session pattern tells the system on which days it can schedule sessions and when to stop repeating the pattern. **For example:** If the number of sessions entered is 10 and the class would repeat on Tuesday and Wednesday (determined by checking the checkboxes), the class would repeat every Tuesday and Wednesday for five weeks.

30. Confirm and/or change the session start time as required in the **Start Time** field.

31. Confirm and/or change the session end time as required in the **End Time** field.

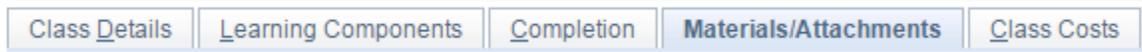
32. Confirm and/or change the session time zone as required in the **Time Zone** field.

33. Confirm and/or change the session days based on the session date as required by checking the correct checkboxes.

34. Confirm and/or change class session instructor information as required in the **Instructors** section.

35. Confirm and/or change class session equipment information as required in the **Equipment** section.

36. Confirm or check the **Observe Holidays** checkbox to observe the holiday schedule that is linked to the facility selected the session.
37. Check the **Delete Existing Sessions** checkbox to delete any previously built sessions, if desired.
 - a. Leaving the checkbox unchecked allows the system to add any new sessions to be built to existing sessions.
38. Click the **Build Sessions** button.
39. Click the date in the **Sessions Date** column in the **Sessions** section to update sessions as needed.
40. Click the **Add Sessions** button to add new sessions to class details.
41. Click the **Delete Session** button to remove sessions.
42. Click the **Save** button.
43. Click the **Return to Class** link.
44. Click the **Completion** tab.
45. Confirm and/or change class components information as required in the **Class Components** section.
46. Click the **Materials/Attachments** tab.
 - a. This is where you can attach PDF's or other materials for the course.



47. Confirm and/or change class materials information as required in the **Material** section.
48. Confirm and/or change class notes information as required in the **Class Notes** section.
49. Confirm and/or change class file attachments as required in the **Attachments** section.
50. Click the **Class Costs** tab.
51. Confirm and/or change class costs information as required in the **Class Costs** section.
52. Confirm and/or change class ad hoc costs and credits information as required in the **Ad hoc Costs and Credits** section.
53. Review system calculated estimated class costs information by clicking the **Calculate Costs** button in the **Estimated Class Costs** section, if the costing features are used.
54. Click the **Save** link.

55. Click the **Class Details** tab.
56. Click the **Status** drop-down menu button.
57. Select the **Active** from the list of values to make the class viewable to learners in the course catalog.
58. Click the **Save** link.

Lesson 8 – Adding a Survey Definition

This lesson shows users how to add a survey definition.

1. Select **Set Up ELM>Catalog>Survey Definition**.
2. Select **Survey Definition**.
3. Add the **Survey ID** and/or **Description**.
4. Click **Search** to see if the Survey ID exists.
5. Click the **Add a New Value** tab .
6. Click the **Add** button.
7. Enter the description in the **Description** field.
8. Enter the short description in the **Short Description**.
9. Click on the **Apply Weighting** drop down.

Add

Specify whether the **Survey Weighting Value** field is available in the Questions or Statements group box. Values are:

- **None:** Select to make the Survey Weighting Value field unavailable.
- **Multiplier:** Select to make the Survey Weighting Value field available and required
 - Select **Multiply** to add weighting values to the responses.

This allows certain responses to stand out when analyzing the survey results.

Most Survey Results aim to make the Maximum Score 100.

10. Add the **Statement Sequence Number**.

Enter a **sequence number** to determine where the question or statement appears in the survey.

11. Select the **Response Type** drop down menu and select the type of response for the question.

Select the type of **response** for the question or statement. Values are:

- **Multiple Choice:** Select to define a question for which the survey taker can select more than one defined response using check marks.
- **No Response:** Select to define a statement that requires no response.
- **Single Choice:** Select to define a question for which the survey taker can select only one of the defined responses using radio buttons.
- **Text Response:** Select to define a question for which the survey taker can enter free form text as a response.

Always add the first question as a **No Response** type question. Add the title of the Survey ID. This acts like a header when the Survey Results are displayed.

For questions with a Response Type of **Multiple Choice** or **Single Choice**, define the answers using the fields in the **Available Responses** group box.

- On the survey, responses for **Multiple Choice** questions have **check boxes** next to them.
- Responses for **Single Choice** questions have **radio buttons** next to them.
- You can also enter available responses for **Text Response** questions.

12. Check the **Required** box, if you wish the question to not be left unanswered.

Select to **require** that the survey taker enter a response for a question before submitting the survey. This field is unavailable for statements with a Response Type of **No Response**.

13. Enter the Question or Statement in the **Question or Statement** field.
14. Enter the text for the possible response in the **Label Text** fields.
15. Set the order of the questions in the **Sequence Number** fields.

16. Click the **plus sign**  to add additional responses.

17. Click the **plus sign**  to add additional questions or statements.

A **No** response will have a Response Value of zero. **No** Response Values are added to Text Responses

18. Click the **Test Survey** Button.
19. Answer all the questions.
20. Click the **Submit** button.
21. The Survey has been submitted and the score is displayed.
22. Click the **OK** button on the pop up message.
23. Click the **Save** button.

Test Survey

Submit

Lesson 9 - Adding Survey Component to a Class

This lesson teaches users how to add a survey definition component to a class.

1. **Enterprise Learning>Catalog>Maintain Classes.**
2. Enter search criteria to locate existing class to add survey component to.

3. Click the **Search** button.
4. Select the correct course from the list of values.
5. Click the **Learning Components** tab.
6. Click the **Add Component** button.
7. Select the **Survey** link.



Select Learning Component

Learning Components		Personalize	Find	View All	First	1-7 of 7	Last
Component Type	Description						
Web-based	Learning provided through the web.						
Sessions	Learning provided through scheduled classroom sessions.						
Assignment	Assignment learning component.						
Survey	Survey learning component.						
Test	Test learning component.						

8. Enter the component title into the **Component Name** field.
9. Enter the component abbreviation in the **Short Name** field.
10. Type a brief description of the component in the **Description** field, if desired.
11. Select a provider type of the **Provider Type** drop down menu, if desired.
12. Click the **Provided By** magnifying glass button to locate a listed provider, if desired.
13. Check the **Internal Survey** checkbox.

Basic Data

*Component Name

*Short Name

Description

Provider Type Provided By

Internal Survey

Survey Definition

Survey ID

Select to add an **internal survey learning component**. When you select this check box, the **Compliance and Technical Data** group box is replaced by the **Survey Definition** group box.

14. Enter the survey ID into the **Survey ID** Field or search using the magnifying glass button.
15. Click **OK**.
16. Click the **Save** button on the **Learning Components** tab.

Survey Definition

Survey ID

Learner Tasks

Lesson 10: Enroll Learners

Lesson 11: Enroll Multiple Learners

Lesson 12: Administer Class Rosters

Lesson 13: Maintain Approvals

Lesson 14: Add Supplemental Learning (External Training)

Learner Tasks include:

1. Enrolling Learners into Classes
2. Administration of Class Rosters
3. Class Approvals
4. Adding Supplemental Learning (External Training)

1. ENROLLING LEARNERS (4 Concepts)

CONCEPT 1: Enterprise Learning Management supports several methods of enrollment and registration:

- ***Individual learners can self-enroll and self-register.***

Learners can browse or search the catalog for classes and enroll in the classes directly. Learners can also add classes to their learning plans and enroll in the planned classes later. If there's no enrollment cutoff date for a class, learners can enroll in the class at any time. However, planned classes are not visible in the employee self-service pages after the class end date is met.

- ***Managers can enroll and register direct reports.***

Managers can browse or search the catalog for classes in which to enroll any team member within the organizational hierarchy. Or, they can add classes to employees' learning plans and enroll the employees in the planned classes later. If there's no enrollment cutoff date for a class, managers can enroll learners in the class at any time. However, the class is not visible in the manager self-service pages after the class end date is met.

- ***Administrators can enroll and register individual learners and groups of learners.***

Administrators can enroll individual learners and small groups of learners through group enrollment and large groups of learners through mass enrollment. Administrators can enroll learners in classes regardless of enrollment cutoff dates.

CONCEPT 2: Enrollment features:

- ***Approvals***

The system might require approval from a manager or administrator before it can confirm enrollment. Administrators are the only individuals who can override approvals. Depending on organizational rules, administrator approval can be required for some forms of payment.

- ***Prerequisites***

Learning classes might have prerequisites that learners must complete before they can enroll. Administrators are the only individuals who can override prerequisites.

- **Waitlists**

Classes can have a capacity limit. When the capacity limit is reached and the waitlist feature is enabled, the system can automatically create a waitlist. If an enrolled learner drops enrollment in the class, the system enrolls the first person on the waitlist automatically, as long as the class start date has not passed. **The system does not enroll waitlisted learners automatically after the class start date.** After the class start date, the administrator must manually enroll the learner by using the *Maintain Class Roster* component or move the learner to a new class through the *Class Roster* component. Administrators can also change a learner's position in a waitlist and increase the waitlist capacity.

- **Reserved seating**

Administrators can reserve seats for learners in classes when they anticipate participation of several learners but cannot identify them. Administrators are the only individuals who can reserve seats and fill the reserved seats.

- **Payment methods**

Learners, managers, and administrators can select different payment methods during enrollment depending on the system setup and the person that makes the enrollment or registration request.

- **Discounts**

Learners can receive discounts on all class and drop currency fees if there is a discount set up for the department or customer organization to which the learner belongs. Discounts do not apply to class or drop fees paid for using training units.

- **Automated notifications**

The State of Indiana ELM platform has enabled workflow so enrollment events generate an automated email notification to learners, managers, administrators, or owners. For example, learners can receive email when administrators approve their enrollment in classes or a class enrollment is pending approval.

CONCEPT 3: Rules for dropping enrollments:

Learners, managers, and administrators can drop a learner's enrollment in a class. However, learners cannot drop classes **if they were not the requesters during enrollment or registration. A learner can only drop classes that he or she self-enrolls in.** When a learner drops a class, the system removes it from the learner's schedule.

Classes can have last drop dates. The system charges a drop fee, if one exists, only if a learner drops after the last drop date. Last drop dates can be set up for classes as either a specific number of days before or after the class start date, on a specific date, or on the class start date. If a last drop date is not specified, learners can drop the class up until the class start date. Administrators can always drop a learner's enrollment in a class, regardless of a class's last drop date or start date.

For example, say the drop cutoff date is January 12 and the class starts on January 15. If a learner drops the class on January 12, the system does not charge the learner the drop fee. If a learner drops the class

from January 13 to January 14, the system charges the learner the drop fee. Only an administrator can drop the learner on or after January 15.

Administrators can modify the drop fees for learners on the class and program roster pages.

CONCEPT 4: Enrollment Statuses:

Each enrollment goes through a series of enrollment statuses—such as planned, pending approval, waitlisted, enrolled, in progress, and completed—as the enrollment progresses. These statuses appear on several of the employee and manager self-service pages, and on the roster and grading pages that are available to administrators and instructors.

The statuses that apply to a particular enrollment record the conditions and prompt a status change can vary depending on the enrollment options enabled for the class and what type of learning components are in the class.

Enrollment statuses work in conjunction with completion statuses for learning components; **a change to the completion status of a learning component can prompt a change in the enrollment status of a class.** Attendance and passing statuses affect the completion statuses of learning components. Together, these statuses help track a learner's progress through a class.

2. ADMINISTERING COURSE ROSTERS

Administrators can use the **Administer Class Roster** component to search for and access any class roster within their learning environments. Using the rosters, they can approve enrollment requests, manage waitlists, drop learners, and update payment details on a learner's enrollment record. Tasks that are performed by changing a learner's enrollment status, such as dropping a learner or approving enrollment, depend on the learner's current enrollment status and the permission lists that are assigned to the administrator. Administrators can update the registration status of an individual learner or use a group action to update multiple learners simultaneously. They can also use the group action feature to send ad hoc email notifications to learners.

The **Administer Class Roster** component can also be used to view and update learners' grades, attendance, and scores. These tasks are discussed in the *Instructor Tasks* section of this guide.

3. CLASS APPROVALS

PeopleSoft provides different components for approving learning requests based on the approver's role and the need for approval information:

- **Maintain Approvals**

This is a manager component. It enables managers to view enrollment requests submitted by their direct reports, and to submit, approve, deny, or push back the requests. Managers can also use this component to insert additional approvers or reviewers at any point in the approval path.

This component can also be accessed by learning administrators acting as special approvers. And if a learner is paying by training unit or purchase order, the owner of the training units or purchase order can access this component to deny or approve the learning request.

- **Team Members**

This is a self-service component for managers. It enables managers to view enrollment requests submitted by their own team members or the direct reports of their immediate team members, and to approve, deny, or push back learning requests.

- **Administer Class Rosters**

This is an administrator component. It enables administrators to view class enrollment requests and to approve or deny the requests.

4. ADDING SUPPLEMENTAL LEARNING (EXTERNAL TRAINING)

The supplemental learning feature is used to record learning completed beyond the cataloged classes (external learning) into a learner's training history so they may receive credit for the training.

Supplemental learning would include such courses as seminar or conference attendance, academic courses, equivalent work experience, or some form of on-the-job training.

LEARNER ID NUMBERS:

The **Learner ID** number is a number sequentially assigned by the **Enterprise Learning Management (ELM)** system. The Learner ID number should be unique to each learner and is established by the creation of a **Learner Profile** within the system.

The Learner ID number is completely separate from the **PeopleSoft ID number** (also called the **User ID**) assigned in the **PeopleSoft HR** system.

The PeopleSoft ID number consists of 1000XXXXXX. The User ID is the first initial of a person's first name and the last six digits of the PeopleSoft ID number. For example: an employee named Lucy Roberts will have a PeopleSoft HR PeopleSoft ID number of 10000058556; but her PeopleSoft HR User ID would be L058556.

Every night, the PeopleSoft HR records integrate with the PeopleSoft ELM records. The PeopleSoft ELM system searches for new PeopleSoft HR User IDs to establish the PeopleSoft ELM Learner Profile. Once a new ELM Learner Profile is created, the system sequentially assigns the next Learner ID available to the learner. Learner ID's are needed to establish learner groups within the system for learner class assignments and enrollments.

The PeopleSoft HR system stores job data record information while the PeopleSoft ELM stores training record information. The PeopleSoft User ID links the two systems together.

An overview of the process is:

1. A PeopleSoft HR Job Data record is created in the system and a **PeopleSoft ID** number is assigned (1000XXXXXX).
2. A **User ID** is created by a person's first initial and last six digits of the PeopleSoft ID number (LXXXXXX).

3. The PeopleSoft HR system **integrates job data records** with the PeopleSoft ELM system.
4. New **learner profiles** are created in the PeopleSoft ELM system using the User ID number.
5. The PeopleSoft ELM system sequentially assigns a **Learner ID number** to the learner profile to track training enrollments and completions in the ELM.

Lesson 10 - Enroll Learners

This lesson will teach administrators how to enroll individual learners into classes.

1. Click **Enterprise Learning>Learner Tasks>Enroll Learners**
2. Enter search criteria for the enrollment requester.

A learning environment and learner group is associated with a learning requester upon a learning request submission. By default, a request inherits the requester's learning environment and the learner group associated with the requester's job and learning profile.

Learners cannot drop classes if they were not the requesters during the enrollment process. A learner can only drop classes that he or she self-enrolls in or are identified as the requester by an administrator during the enrollment process.

3. Click the **Search** button.
4. Click the Select button to the right of the requester in the **Select Requester** section.
5. Enter search criteria in the **Search for Learning** section, if desired.
6. Click the **Search** button.
7. Locate the correct class in the **Select learning for enrollment** section.
8. Click the **Enroll** button to the right of the correct class in the list.

9. Enter search criteria for the learner to be enrolled into the class in the **Learner Search Details** section.

10. Click the **Search** button.

11. Check the checkbox in the Select column of the Select Learners section to select the learner for enrollment.

Current Learners to Enroll				
EmpID	Name	*Job Title	Hire Date	
	Chelsie Benefiel	Human Resources Generalist 2	03/23/2015	

Select Learners				
Select	Employee ID	Name	Job Title	Hire Date
<input checked="" type="checkbox"/>		Chelsie Benefiel	Human Resources Generalist 2	03/23/2015

Select All
 Clear All
 Search for More Learners

12. If present, review the **Approval Required** designation in the **Approval Required** section.

Approval Required
 Approval Required Yes Approve Enrollment Now

The **Approval Required** section displays when manager or administrator approval is needed to enroll in a course and is used to override manager and administrator approvals. An administrator cannot override payment approvals here. Administrators can use the roster component to approve payment approval requests.

The **Approval Required** option displays whether the system requires manager or administrator approval to enroll in the class.

Check the **Approve Enrollment Now** checkbox to override manager and administrator approvals for all selected learners.

13. If present, review the **Reserved Seats Available** number in the Reserved Seats Allowed section.

The **Reserved Seats Allowed** section displays if reserved seats were defined for the class on the **Class Details** page and is used to allow selected learners to use reserved seats as needed. Once a reserved seat is filled, the seat does not revert to reserved status if a learner drops the class.

The **Reserved Seats Available** option displays the number of available reserved seats.

Enter the number of seats to use in the **Use Reserved Seats** field for selected learners to be enrolled into a reserved seat.

14. Click the **Continue Enrollment** button.

15. Confirm and/or change class fees information as required in the **Fees Information** section.

Administrators can also enroll new learners from the Administer Class Roster page. Instructions can be found on page 60 in this guide.

The **Fees Information** fees and drop charges for a class default from the **Class Details** page. The section is used to modify class fees and drop charges for each learner.

Fees Information fields include:

Price Per Seat - A price for the class.

Drop Charge - A drop charge for the class.

Training Units - The number of training units to be changed to each learner for the class.

Drop Units - The number of training units to be charged back to each learner when the class is dropped.

16. Confirm and/or change class chargeback information as required in the **Enter Charge Back Information - Chargebacks** section.

The **Enter Charge Back Information** section is used to enter chargeback account information. The Chart Field values appear by default from the general ledger business unit that is mapped to the PeopleSoft HR business unit the requester belongs to.

17. Click the **Submit Enrollment** button.

18. Note that the section at the bottom of the page containing the learner's information is titled **Enrollment Successful**.

19. Confirm the status of the enrollment in the Status column of the **Enrollment Successful** section.

Fees Information						
Price Per Seat		USD		Training Units		
Drop Charge		USD		Drop Units		

Enrollment Successful						
			Personalize	Find	1 of 1	Last
Employee ID	Name	Job Title	Hire Date	Confirmation	Status	Alerts
	Chelsie Benefiel	Human Resources Generalist 2	03/23/2015	2182980	Enrolled	Alerts

1. The **Enrollment Successful** section displays all learners for whom enrollment is successful. Successful enrollments include learners with **enrolled**, **waitlisted**, **pending payment**, or **pending approval** statuses.

Columns to note within the Enrollment Successful section include:

Confirmation - Displays the confirmation number for the learner. The system uses this number to track the enrollment history and to determine the learner's priority in a user waitlist.

Status - Displays the enrollment status for each learner.

2. The **Enrollment Unsuccessful** section displays all learners for whom enrollment was unsuccessful. Click the **Alerts** link for each learner to see the error conditions that cause the enrollment to fail. To override conditions that are preventing enrollment or registration, select the checkbox for the learner and click the **Submit** button on this page so the system will ignore the condition preventing enrollment.

Administrators **CANNOT** override unsuccessful enrollments when:

- a class and its waitlist are full
- a duplicate enrollment is detected

Columns to note within the Enrollment Unsuccessful section include:

Alerts - Accesses the **Alert Details** page to view the condition preventing enrollment for a learner.

Lesson 11 - Enroll Multiple Learners

Multiple learners consisting of **less than 60 individuals** are considered group enrollments.

This lesson teaches administrators how to enroll multiple learners into a class.

1. Click **Enterprise Learning>Learner Tasks>Enroll Learners**
2. Enter search criteria for the enrollment requester.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features assists with narrowing the search for specific data and/or assist with setting search parameters.

A learning environment and learner group is associated with a learning requester upon a learning request submission. By default, a request inherits the requester's learning environment and the learner group associated with the requester's job and learning profile.

Learners cannot drop classes if they were not the requesters during the enrollment process. A learner can only drop classes that he or she self-enrolls in or are identified as the requestor by an administrator during the enrollment process.

3. Click the **Search** button.
4. Click the Select button to the right of the requester in the **Select Requester** section.
5. Enter search criteria in the **Search for Learning** section, if desired.
6. Click the **Search** button.
7. Click the **Enroll** button to the right of the correct class in the list.

Select learning for enrollment					Personalize Find View All  	First  1 of 1  Last
Code	Name	Type	Start Date	Language	Enroll	
SPD_00057_021617	Information & Records Management	Instructor Led Training	02/16/2017	English		

8. Enter search criteria in the **Learner Search Details** section

9. Click the **Search** button.

10. Check the checkbox in the **Select** column of the **Select Learners** section to select the learner for enrollment.

11. Click the **Search for More Learners** link.

12. Enter search criteria for the second learner to be enrolled into the class in the **Learner Search Details** section.

Select	Employee ID	Name	Job Title	Hire Date
<input type="checkbox"/>	1	Chelsie Benefiel	2NA2	

The search criteria used for the previous learner will still be populated in the Learner Search Details section! Be sure to replace all search criteria used for the previous learner with the search criteria to be used for the next learner.

13. Click the **Search** button.

14. Check the checkbox in the **Select** column of the **Select Learners** section to select the learner for enrollment.

15. Click the **Search for More Learners** link.

16. Continue searching for and selecting **up to 60 (total of 59)** learners for group enrollment. 30 or more learners will require the completion of the Mass Enrollment process.

The **Approval Required** section displays when manager or administrator approval is needed to enroll in a course and is used to override manager and administrator approvals. An administrator cannot override payment approvals here. Administrators can use the roster component to approve payment approval requests.

The **Approval Required** option displays whether the system requires manager or administrator approval to enroll in the class.

Check the **Approve Enrollment Now** checkbox to override manager and administrator approvals for all selected learners.

The **Reserved Seats Allowed** section displays if reserved seats were defined for the class on the **Class Details** page and is used to allow selected learners to use reserved seats as needed. Once a reserved seat is filled, the seat does not revert to reserved status if a learner drops the class.

The **Reserved Seats Available** option displays the number of available reserved seats.

Enter the number of seats to use in the **Use Reserved Seats** field for selected learners to be enrolled into a reserved seat.

17. When finished selecting learners, click the **Submit Enrollment** button.
18. Confirm and/or change class fees information as required in the **Fees Information** section.
19. Confirm and/or change class chargeback information as required in the **Enter Charge Back Information - Chargebacks** section.

The **Enter Charge Back Information** section is used to enter chargeback account information. The Chart Field values appear by default from the general ledger business unit that is mapped to the PeopleSoft HR business unit the requester belongs to.

20. Click the **Submit Enrollment** button.
21. Note that the section at the bottom of the page containing the learner's information is titled **Enrollment Successful**.

1. The **Enrollment Successful** section displays all learners for whom enrollment is successful. Successful enrollments include learners with **enrolled**, **waitlisted**, **pending payment**, or **pending approval** statuses.

Columns to note within the Enrollment Successful section include:

Confirmation - Displays the confirmation number for the learner. The system uses this number to track the enrollment history and to determine the learner's priority in a user waitlist.

Status - Displays the enrollment status for each learner.

2. The **Enrollment Unsuccessful** section displays all learners for whom enrollment was unsuccessful. Click the **Alerts** link for each learner to see the error conditions that cause the enrollment to fail. To override conditions that are preventing enrollment or registration, select the checkbox for the learner and click the **Submit** button on this page so the system will ignore the condition preventing enrollment.

Administrators **CANNOT** override unsuccessful enrollments when:

- an class and its waitlist are full
- a duplicate enrollment is detected

Columns to note within the Enrollment Unsuccessful section include:

Alerts - Accesses the **Alert Details** page to view the condition preventing enrollment for a learner.

22. Click any Alerts links appearing in the **Alerts** column to access the **Alert Details** page and view the condition preventing enrollment for a learner.
23. Upon reviewing any enrollment alerts to determine the appropriate action, click the **Return to Previous Page** link.

Lesson 12 - Administer Class Rosters

Administrators can use the **Administer Class Roster** component to search for and access any class roster within their learning environments. Using the rosters, they can approve enrollment requests, manage waitlists, drop learners, enroll new learners, print course roster and update payment details on a learner's enrollment record. Tasks that are performed by changing a learner's enrollment status, such as dropping a learner or approving enrollment, depend on the learner's current enrollment status and the permission lists that are assigned to the administrator. Administrators can update the registration status of an individual learner or use a group action to update multiple learners simultaneously. They can also use the group action feature to send ad hoc email notifications to learners.

The **Administer Class Roster** component can also be used to view and update learners' grades, attendance, and scores. These tasks are discussed in the *Instructor Tasks* section of this guide.

This lesson teaches administrators how to search for and access class rosters to updates a learner's class status, enroll new learners and print the course roster.

1. Click **Enterprise Learning>Learner Task>Administer Class Rosters**.
2. Enter search criteria for the class roster to be reviewed and/or updated.
3. Click the **Search** button.

The differences in search options on the **Administer Class Roster - Search for Classes** page are:

- To view the entire list of learners for **one class**, search using the **Title** or **Class Code** fields.
- To view the entire list of classes assigned to **one learner**, search using the **Learner** or **Employee ID** fields.

4. Click the **Roster** button to the right of the class to be reviewed and/or updated.

Title	Class Code	Type	Start Date	Enrolled
E-Orientation	SPD_WBT_E-Orientation_2017	Computer-Based Training	01/24/2017	Roster

5. The system defaults to display the **Class Roster - Enrollment Status** search results in a list.

The **Class Roster** section list may return more learners than can be viewed on one page. Use the **Next** link in the upper-right-hand corner of the **Class Roster** section to move through the list of learners.

6. Click a learner's name link in the **Name** column to access the **User Profile** pop-up.
7. If a Security Information warning is received, click the **Yes** button.
8. After reviewing the user profile information, click **close**.



The **User Profile** displays high-level job and contact information about the learner. This information may be useful to confirm a learner's job title if catalog administrator approval is needed for training specific to a job title or employment level (such as supervisor or manager only).

Roster							Personalize 
	Name	Employee ID	Confirmation	Current Status	*New Status	Waitlist Priority	
<input type="checkbox"/>	Chelsie Benefie		2182979	In-Progress	Select ...		Details

- a. The **Employee ID** column display's each learner's PeopleSoft HR Employee ID number (this number may also be referenced as the PeopleSoft ID number or User ID by system users).
- b. The **Confirmation** column displays the enrollment confirmation number for the learner. This number was assigned by the system during the enrollment process.
- c. The **Current Status** column displays a learner's current enrollment status for the class.
- d. Click the **New Status** drop-down menu button to change an individual learner's status to Dropped for learner's to be removed from a class.
- e. The **Waitlist Priority** column displays a learner's waitlist priority number, if any.

Multiple learners may be selected to perform a single action by checking the checkboxes of the left of learner's names in the **Name** column. For example, to change a class status for multiple learners to the same status at the same time, check the checkbox for each learner whose status is to be changed.

After checking the checkboxes of the individual learners to process an action for multiple learners, locate the **Group Actions** drop-down menu button to select the action to be processed from the list of values (**Group Action** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.

9. Click the **Details** button to access the **Learner Roster** page.

10. The **Learner Roster** page can be used to enter individual learner attendance statuses, completion statuses, grades, and scores, for all learning components within a class.
 - a. The page is identical to the page used by instructors.
11. The **Completion Details** section of the **Learner Roster**, shows the learner(s) **Enrollment Status**, **Passing Status** and **Grade** for a class.
12. Click the **Grade** drop-down menu option to change the class grade.

Class Components							
Personalize [?] [] 1-11 of 11							
Status []							
	Name	Type	*Attendance	*Grade	Passing Status	Score	Completion Status
<input type="checkbox"/>	New Employee Paperwork and the Onboarding Experience	Web-based	Unknown	Not Graded	Not Required		Not Attempted

13. The **Status** tab in the **Class Components** section provides fields for updating the learner(s) attendance, grade, passing status, and score for each learning component.
14. Click the **Attendance and Grade** drop-down menu buttons to change learner status as needed.
15. These fields are the same as those on the **Component Roster** section on the **Class Component** page.
16. Click the **Details** button to access the **Learner Roster** page.
17. If necessary, update the **attendance status**.
18. If necessary, update the **grade status**.
19. If updates are made, click the **Save** link.

<input type="checkbox"/> Required Trainings	Web-based	Unknown	Not Graded	Not Required		Not Attempted
<input checked="" type="checkbox"/> Select All	<input type="checkbox"/> Clear All					
For Selected Components						
*Set Attendance to		Select..	Go			
*Set Grade to		Select..	Go			

20. Click the **Set Grade to** drop-down menu button in the **For Selected Components** box to change the grade status for **all** learners enrolled into a class component.
21. Click the **Go** button to the right of the **Set Grade to** field to capture grade status changes for selected class component learners.
22. Click the **Return to Previous Page** link to return to class roster.

Grades and attendance may also be marked directly through the **Grades and Attendance** link.

[Enrollment Status](#)

Grades and Attendance

[Learner Details](#)

[View All](#)

This option allows for individual grade and attendance status recording instead of using the class component status changes affecting all learners. Utilization of the **Group Action** feature may also be used to record the same grades or attendance for multiple learners as desired.

23. Click the **Class Roster - Grades and Attendance** link to review the **Grades and Attendance** list options in the **Class Roster** section.

Multiple learners may be selected to perform a single action by checking the checkboxes of the left of learners' names in the **Name** column. For example, to change a class status for multiple learners to the same status at the same time, check the checkbox for each learner whose status is to be changed.

After checking the checkboxes of the individual learners to process an action for multiple learners, locate the **Set Attendance to** or **Set Grade to** drop-down menu button(s) to select the action(s) to be processed from the list of values (**Set Attendance to** or **Set Grade to** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.

24. Click the **Grade** drop-down menu button to select the learner's grade for the class.
25. Click the **Attendance** drop-down menu button to select the learner's attendance status for the class.
26. Click the **Save** link to save learner updates.

Enroll New Learners from Administer Class Roster

1. Click **Enterprise Learning>Learner Task>Administer Class Rosters**.
2. Enter search criteria for the class roster to be reviewed and/or updated.
3. Click the **Search** button.

The differences in search options on the **Administer Class Roster - Search for Classes** page are:

- To view the entire list of learners for **one class**, search using the **Title** or **Class Code** fields.
- To view the entire list of classes assigned to **one learner**, search using the **Learner** or **Employee ID** fields.

4. Click the **Roster** button to the right of the class to be reviewed and/or updated.

Title	Class Code	Type	Start Date	Enrolled	
E-Orientation	SPD_WBT_E-Orientation_2017	Computer-Based Training	01/24/2017		Roster

5. The system defaults to display the **Class Roster - Enrollment Status** search results in a list.

6. Click **Enroll New Learner** Button at the bottom of the Administer Class Roster page.

<input type="checkbox"/>	Doris Bell	10000252415	2644246	Completed	Select ...	Details
<input type="checkbox"/>	Amanda Denton	10000212312	2644518	Completed	Select ...	Details
<input type="checkbox"/>	Joseph Stetz	10000212381	2644525	Completed	Select ...	Details
<input type="checkbox"/>	Alma Steeb	10000212371	2644523	Completed	Select ...	Details
<input type="checkbox"/>	Mark Rodgers	10000212342	2644521	Completed	Select ...	Details
<input type="checkbox"/>	Joseph Ruffledne	10000213034	2644591	Completed	Select ...	Details

Select All
 Clear All
 *Group Actions: Select ...
 Go

Enroll New Learners

Save Previous Next Return To Search Page

7. Enter search criteria in the **Learner Search Details** section

8. Click the **Search** button.

Learner Search Details

Learner Business Unit

Employee ID Job Code Description

Manager Position Description

Learner Group Organization Type

Organization Name

Hire Date From Hire Date Through

Search Reset

9. Check the checkbox in the **Select** column of the **Select Learners** section to select the learner for enrollment.

10. Click the **Search for More Learners** link.

11. Enter search criteria for the second learner to be enrolled into the class in the **Learner Search Details** section.

Search for More Learners

Submit Enrollment

Approval Required

Approval Required Yes Approve Enrollment Now

Select Learners Personalize | Find | View All | First 1 of 1 Last

Select	Employee ID	Name	Job Title	Hire Date
<input type="checkbox"/>	1	Chelsie Benefiel	2NA2	

Select All
 Clear All
 Search for More Learners

Submit Enrollment

12. Click the **Search** button.

13. Check the checkbox in the **Select** column of the **Select Learners** section to select the learner for enrollment.

14. Click the **Search for More** Learners link.

15. Continue searching for and selecting **up to 60 (total of 59)** learners for group enrollment. 60 or more learners will require the completion of the Mass Enrollment process.

Print a Class Roster from the Class Roster Page

1. Click the **Search Options** link to choose which learners you want to appear on the roster.

2. You may uncheck any of the **Class Status** you do not want on the roster. For instance if the Class roster is being used for a sign-in sheet you may only want to show learners in “enrolled” status.

Class Roster

Class Code SPD_00061_050718 Class Name [Onboarding](#)
 Type Instructor Led Training Contact [Gail Richards](#)
 Start Date 05/07/2018 End Date 05/07/2018
 Last Enrollment Date 05/07/2018 Last Drop Date 05/07/2018
 Available Seats -- Available Waitlist 0
 Language English Duration 1 Days

[Save](#) Previous Next [Return To Search Page](#)

Learner

First Name Last Name
 Employee ID Confirmation Number

Enrollment Date:

From Date To Date

Class Status

Enrolled Waitlisted Completed Not Completed Pending Approval
 Dropped Denied In Progress Pending Payment

3. Once you have selected the Class Status click **Print Roster** and the Roster will populate in a new window.

Class Roster

Class Code SPD_00061_050718 Class Name [Onboarding](#)
 Type Instructor Led Training Contact [Gail Richards](#)
 Start Date 05/07/2018 End Date 05/07/2018
 Last Enrollment Date 05/07/2018 Last Drop Date 05/07/2018
 Available Seats -- Available Waitlist 0
 Language English Duration 1 Days

[Save](#) Previous Next [Return To Search Page](#)

To show or change the selected filter options select [Search Options](#)

Class Roster [Class Component](#)

Enrollment Status [Grades and Attendance](#) [Learner Details](#) [View All](#)

Class Roster

1 - 93 of 93 rows Personalize |

Name	Employee ID	Confirmation	Current Status	*New Status	Waitlist Priority	
<input type="checkbox"/> Katrina Chappell	10000238843	2975374	Enrolled	Select ...		<input type="button" value="Details"/>
<input type="checkbox"/> Rachel Wilson	10000206604	2975378	Enrolled	Select ...		<input type="button" value="Details"/>
<input type="checkbox"/> Ulises Sosa Garcia	10000237740	2975373	Enrolled	Select ...		<input type="button" value="Details"/>
<input type="checkbox"/> Roberta Roberts	10000203609	2975377	Enrolled	Select ...		<input type="button" value="Details"/>
<input type="checkbox"/> Allison Kroeger	10000335512	2975392	Enrolled	Select ...		<input type="button" value="Details"/>
<input type="checkbox"/> Sandra Morse	10000046443	2975376	Enrolled	Select ...		<input type="button" value="Details"/>

Lesson 13 - Maintain Approvals

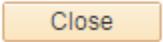
This lesson teaches administrators acting as special catalog approvers how to approve or deny class learning requests.

1. Click **Enterprise Learning>Learner Tasks>Maintain Approvals**.
2. Click the **Name** link in the Team Member column to view a learner's **User Profile** information.

The **User Profile** displays high-level job and contact information about the learner.

This information may be useful to confirm a learner's job title if catalog administrator approval is needed for training specific to a job title or employment level (such as supervisor or manager only).

3. After reviewing the user profile information, click **close**.



4. Click the class title link in the **Name** column to view a class's enrollment details information.

Team Members					View All 	First 	1-5 of 6	Last 
Team Member	Type	Name	Price	Approval Details				

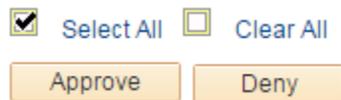
5. After reviewing the enrollment details, click the **Return to Previous Page** link.



6. Click the **Details** link in the **Approval Details** column to view a class's enrollment details information. (This information is the same as clicking the class title link in the Name column).

7. After reviewing the enrollment details, click the **Return to Previous Page** link.

8. Multiple learners may be selected to perform a single approval or denial action by:
 - checking the checkboxes of the left of each name in the **Team Member** column or by;
 - checking the Select **All** checkbox located under the list of team members to select all of the learners in the list (to clear all team member selections, check the **Clear All** checkbox).



9. Click the **Approve** button to authorize a class enrollment or click the **Deny** button to not authorize a class enrollment.

10. After reviewing the updated status of the selected team member(s) in the **Status** column of the **Maintain Approvals** page, click the **Return to Approvals** link to review additional enrollment requests as needed.

Lesson 14 - Add Supplemental Learning (External Training)

The supplemental learning feature is used to record learning completed beyond the cataloged classes (external learning) into a learner's training history so he/she may receive credit for the training. Supplemental learning would include such courses as seminar or conference attendance, academic courses, equivalent work experience, or some form of on-the-job training.

Completed formal training provided by an instructor, academic institution, or training facility **REQUIRES DOCUMENTATION** (certificate, diploma, license, etc.) before the training record can be updated to give the learner credit for the training.

This lesson teaches administrators how to add supplemental (external) training opportunities to an employee's training record.

1. Click **Enterprise Learning>Learner Tasks>Add Supplemental Learning**
2. Enter search criteria to locate the learner.
3. Click the **Search** button.
4. Upon locating the learner, click the **Add** button to the right of the learner in the Select Learners section.
5. Click the Type drop-down menu button in the **Select Supplement Learning Type** section.

6. Select the supplemental learning type from the list of values.

7. Click the **Continue** button.

8. Enter the supplemental learning details into the **Supplemental Learning Details** section fields.

Field titles beginning with an asterisk (*) are required fields that must be completed.

9. After all required and requested fields are completed, click the **Save** button.

Mass Enrollments

Lesson 15: Mass Enroll Learners (Enroll Learner Groups)

Enrollments consisting of **60 or more** individuals requires **mass enrollment**. Mass enrollment provides an efficient method for handling large volume enrollments by submitting one request for a large number of learners.

There are three parts to completing mass enrollments:

1. Mass enroll the learners
2. Process the Mass Enrollment
3. Review the Mass Enrollment

Lesson 15 - Mass Enroll Learners (Enroll Learner Groups)

Multiple learners consisting of **60 individuals or more** are considered mass enrollments.

This lesson teaches administrators how to mass enroll learner groups into a class.

1. Click **Enterprise Learning>Learner Tasks>Enroll Learners**.
2. Enter search criteria for the training requester.

A learning environment and learner group is associated with a learning requester upon a learning request submission. By default, a request inherits the requester's learning environment and the learner group associated with the requester's job and learning profile.

Learners cannot drop classes if they were not the requesters during the enrollment process. A learner can only drop classes that he or she self-enrolls in or are identified as the requestor by an administrator during the enrollment process.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

3. Click the **Search** button.
4. Click the **Select** button to right of the correct requester to select the requester.
5. Enter search criteria in the **Search for Learning** section, if desired.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

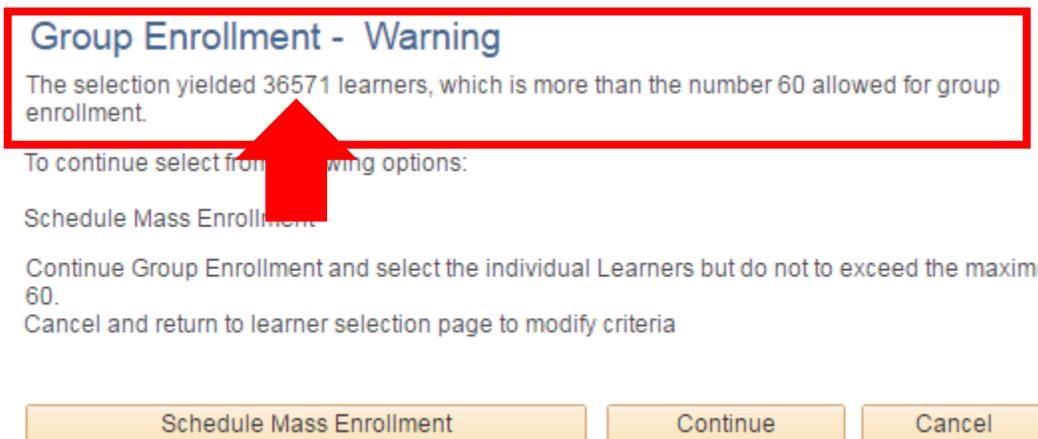
Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

6. Click the **Enroll** button to the right of the correct training class in the list.
7. A mass enrollment would include an entire **Learner Group, Business Unit, Job Code, Position, or Organization**.

At least one form of search criteria is required to continue. Users will not be able to continue past this screen without entering search criteria.

8. Click the magnifying glass button to the right of the appropriate **Learner Group** search field to locate the correct learner group for enrollment.
9. Enter search criteria for the group of learners to mass enroll.
10. Click the **Look Up** button.
11. Select the correct learner group from the list of values.
12. Click the **Search** button.

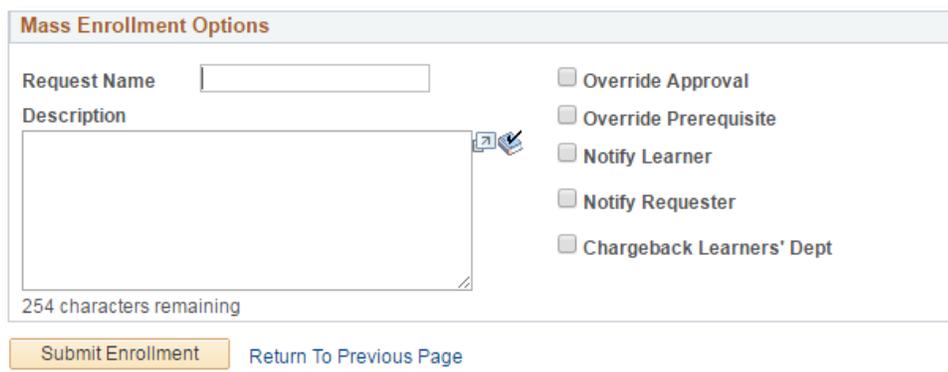
A Group Enrollment Warning will appear. Please verify the number of learners to be enrolled into a course. If this number does not match your total, cancel the enrollment and start over.



13. Click the **Schedule Mass Enrollment** button.

14. Click in the **Request Name** field.

15. Check the **Override Approval** checkbox, if desired.



Check this checkbox to override manager and administrator approval for all learners. If the class requires approval and the checkbox is left unchecked, the system sets the enrollment status for all learners to **Pending Approval**.

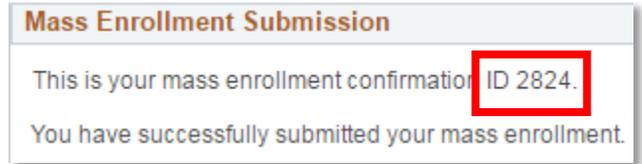
This option does not override payment approvals that the system requires when a training unit pool or purchase order has an owner assigned.

16. Check the **Override Prerequisite** checkbox, if desired.

Check this option to override required and enforced prerequisites for all learners.

17. Click the **Continue** button.

18. Click the **Submit Enrollment** button.
19. The system displays the mass enrollment confirmation ID number in the **Mass Enrollment Submission** section.



Use this number to locate the mass enrollment during the *Mass Enrollment Request* process to view the status of the mass enrollment.

Instructor Tasks

Lesson 16: View Schedule

Lesson 17: Mark Grades and Attendance

Lesson 18: Add a Facility

Lesson 16 - View Schedule

This lesson teaches course instructors how to access and view instructor schedules for instructor-led courses to which they are assigned.

1. Click **Enterprise Learning>Instructor Tasks>View Schedule**.
2. Enter dates in the **From and To** fields to limit the sessions displayed by the system to a specific range of dates, if desired.
3. Click the **Refresh** button to display scheduled instructor sessions within the entered date range.
4. Scheduled instructor sessions will appear in the **Scheduled Sessions** section.
5. Click a link in the **Session Roster** column to access the **Component Roster** page for the scheduled session.
6. After reviewing **Component Roster**, the click the **Return to Previous Page** link.



The **Component Roster** section list may return more learners than can be viewed on one page. Use the **Next** link in the upper-right-hand corner of the **Component Roster** section to move through the list of learners.

7. Click a link in **the Class Roster** column to access the Class Roster page for the scheduled session.

- Review the **Class Roster** as needed. Note those learners who are in a **Waitlist** status are assigned a waitlist priority number in the **Waitlist Priority** column.

Lesson 17 - Mark Grades and Attendance

This lesson teaches instructors how to mark grades and attendance for a class using the class component roster or the class roster.

- Click **Enterprise Learning>Instructor Tasks>Mark Grades and Attendance**.
- The instructor's name automatically defaults into the **Instructor** field.
- Enter additional search criteria to search for classes assigned to the instructor.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

- Click the **Search** button to locate classes.
- Locate the correct learning class in the list of values.

The **Learning Classes** section blue title bar lists the number of returns on the right-hand side of the blue title bar. The search may return more learning classes than can be viewed on one page. To view additional classes use the following options located in the **Learning Classes** blue title bar:

- Use the **scroll left arrow** or **scroll right arrow buttons** on each side of the numbered returns (use **First** link to return to the first page of returns and use the **Last** link to go to the last page of returns), or;
- Click the **View All** link to view all of the returns or increase the number of returns on the page, or;
- Click the **Find** link to locate a specific value within the list.

In addition, clicking the **column titles** will order the list either alphabetically or chronologically depending on the column title that was clicked.

- After locating the learning class, click the **Roster** button to the right of the class.

Learning Classes					Personalize	Find	View 100	First	1-10 of 1040	Last
Title	Class Code	Type	Start Date	Enrolled						
E-Orientation	SPD_WBT_E-Orientation_2017	Computer-Based Training	01/24/2017	1						Roster

- The system defaults to display the **Class Roster - Enrollment Status** search results in a list. The list is in the **Class Roster** section of the page.

Roster							Personalize [?]
Name	Employee ID	Confirmation	Current Status	*New Status	Waitlist Priority		
<input type="checkbox"/> Chelsie Benefield		2182979	In-Progress	Select ...		Details	

- To enter individual scores for learners in the class roster, click the **Details** button to the right of the learner's name.

The **Details** button is not available for those learners whose enrollment was never **approved** or was **denied**.

- **FOR INSTRUCTIONS TO LOCATE AN INDIVIDUAL LEARNER WITHIN A LIST, SEE STEPS 14-16 OR SKIP TO STEP 17.**
- **TO UPDATE THE CLASS STATUS FOR INDIVIDUAL OR MULTIPLE LEARNERS, GO TO STEPS 17-24**
 - **TO UPDATE THE COMPONENT ROSTER STATUS FOR INDIVIDUAL OR MULTIPLE LEARNERS GO TO STEPS 25-28.**

- The Learner Roster section appears to update the attendance, grades, and enter a score the selected learner for one or all class components for the class.

Completion Details		
Enrollment Status	Passing Status	*Grade
In-Progress	Pending	Not Graded

- Click the **Grade** drop-down menu button to select the learner's grade in the **Completion Details** section.

- Make the changes to the learner's attendance, grade, and score in the **Class Components** section.

Class Components							Personalize [?] [Grid]	1-11 of 11
Name	Type	*Attendance	*Grade	Passing Status	Score	Completion Status		
<input type="checkbox"/> New Employee Paperwork and the Onboarding Experience	Web-based	Unknown	Not Graded	Not Required		Not Attempted		

If there are multiple class components, more than one component may be selected to perform a single action by checking the checkboxes of the left of class names in the **Name** column. For example, to change an attendance and/or grade status for multiple class components at the same time, check the checkbox for each class the status is to be changed.

After checking the checkboxes of the class components to process an action for, locate the **Set Attendance to** or **Set Grade to** drop-down menu button(s) to select the action(s) to be processed from the list of values (**Set Attendance to** or **Set Grade to** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.

12. Click the **Save** link.
13. Click the **Return to Previous Page** link.
14. To locate an individual learner within a multi-page list, click the **Search Options** link.
15. Enter search criteria for the learner.
16. Click the **Search** button to locate the learner. (This process may be done to search for individual learners on any listing.)
17. Click the **Grades and Attendance** link.
18. Grades, attendance, and scores can also be changed and/or entered for individual or multiple learners from the **Grades and Attendance Class Roster**.

Multiple learners may be selected to perform a single action by checking the checkboxes of the left of learner's names in the **Name** column. For example, to change a class status for multiple learners to the same status at the same time, check the checkbox for each learner whose status is to be changed.

After checking the checkboxes of the individual learners to process an action for multiple learners, locate the **Set Attendance to** or **Set Grade to** drop-down menu button(s) to select the action(s) to be processed from the list of values (**Set Attendance to** or **Set Grade to** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.

19. If different grades or attendances are required for different sets of multiple learners, click the **Clear All** link to clear all of the checkboxes for the first action.
20. Then, check the checkboxes for the next set of learners to perform the next multiple action for.

21. Click the **View All** link to view a list of learners combining all of the fields from the **Enrollment Status, Grades and Attendance, and Learner Details** pages, if desired.

The screenshot shows the 'Class Roster' page with navigation tabs for 'Enrollment Status', 'Grades and Attendance', 'Learner Details', and 'View All' (highlighted with a red box). Below the tabs is a table with the following data:

Name	Employee ID	Confirmation	Current Status	*New Status	Waitlist Priority	*Grade	*Att
<input type="checkbox"/> Jeanetta Winders		1881078	Completed	Select ...		Not Graded	
<input type="checkbox"/> Nicole Watson		1883533	Completed	Select ...		Not Graded	
<input type="checkbox"/> Joe Mann		1883639	Completed	Select ...		Not Graded	

22. To add comments regarding a learner's grade, attendance, or score, click the **Comments** button to the right of the **Score** field for the learner.



23. Enter the instructor comments into the **Comments** field.

The system displays the comments information entered into the **Comments** field on the self-service **Class Progress** page that learners and managers can access. Comments also appear on some reports.

24. When finished entering comments, click **OK**.
25. Click the **Save** to save any changes or comments to the class roster.

GO TO STEP 33

26. To make changes to multiple learner attendance, grades, and scores for all components within a class, click the **Class Component** link.



27. Changing a **learner's** grade and attendance information for a class does not affect attendance and grade information entered for the **class's components**. However, changing a learner's grade and attendance information for a **component DOES** affect the attendance and grade information for a **class**.

28. To enter individual or multiple scores for learners in the component roster, click the **Details** button to the right of the component's name in the **Class Components** section.

The screenshot shows the 'Class Components' table with the following data:

Order	Required	Name	Type	Details
1	Optional	New Employee Orientation Online Packet	Assignment	<input type="button" value="Details"/>
2	Optional	New Employee Paperwork & the Onboarding Experience	Web-based	<input type="button" value="Details"/>
3	Required	Benefits Presentation	Web-based	<input type="button" value="Details"/>

29. The **Component Roster** section appears to update the attendance, grades, and enter a score for the selected learner(s) for the class component and all classes within the component.

30. Make the changes to the learner's attendance, grade, and score in the **Component Roster** section.

Multiple learners may be selected to perform a single action by checking the checkboxes of the left of learners' names in the **Name** column. For example, to change a component status for multiple learners to the same status at the same time, check the checkbox for each learner whose status is to be changed.

After checking the checkboxes of the class components to process an action for, locate the **Set Attendance to** or **Set Grade to** drop-down menu button(s) to select the action(s) to be processed from the list of values (**Set Attendance to** or **Set Grade to** lists are often located at the bottom of the page). Then, click the **Go** button to complete the process.

- **FOR INSTRUCTIONS TO LOCATE AN INDIVIDUAL LEARNER WITHIN A LIST, SEE STEPS 29-31 OR SKIP TO STEP 32.**

31. To locate an individual learner within a multi-page list, click the **Search Options** link.
32. Enter search criteria for the learner.
33. Click the **Search** button to locate the learner. (This process may be done to search for individual learners on any listing.)
34. Click the **Save** link to save any changes or comments to the component roster.
35. Click the **Return to Previous Page** link to return to the **Class Roster** page, if desired.

Lesson 18 - Add a Facility

When scheduling sessions for a class, specify the facility in which the class sessions take place.

Defining a facility has three parts:

1. Basic facility-wide data, such as address, contact, and attachments.
2. The facility's rooms, specifying their location by building and floor and the equipment that comes with each room.
3. The facility's equipment inventory from which courses can be allocated for a scheduled class.

This lesson teaches administrators how to add a facility.

1. Click **Enterprise Learning>Learning Resources>Facilities**.
2. Enter search criteria to update an existing facility or click the **Add a New Value** tab to create a new facility.

3. Enter the facility description into the **Description** field. It is recommended this be the title of the agency that administers the training room.

The screenshot shows a web form with several input fields. At the top, there are three tabs: 'Facility' (selected), 'Equipment and Attachments', and 'Rooms'. Below the tabs are the following fields: '*Description' (a long text box), 'Short Description' (a shorter text box), 'Holiday Schedule ID' (a text box with a search icon), 'Mail Drop Location' (a text box), 'Vendor' (a text box with a search icon), and '*Customer' (a text box with a search icon).

4. Click in the **Short Description** field.

5. Enter a short description of the facility into the **Short Description** field.

6. Click the **OK** button.

7. Confirm the correct **Existing Person** or **Ad-hoc Contact** button is selected for the room administrator in the **Facility Contacts** section.

8. Click the **Contact** Magnifying Glass button to locate an existing person in the system using search criteria or enter the contact information for an ad-hoc contact.

The screenshot shows two sections. The 'Facility Address' section has a 'Country' dropdown set to 'USA' with 'United States' next to it, and an 'Address' text box with an 'Edit Address' button and a magnifying glass icon. The 'Facility Map' section has radio buttons for 'Image' (selected) and 'URL', an 'Upload Image' button, and a text box for a URL with the example '(example: http://www.peoplesoft.com)'.

9. Click the **Contact Type** drop-down menu button.

10. Select the correct contact type from the list of values.

The screenshot shows the 'Facility Contacts' section with a 'Find | View All' header and navigation buttons. It features radio buttons for 'Existing Person' (selected) and 'Ad-hoc Contact'. Below are search fields for 'Contact', '*Contact Type' (a dropdown menu), 'Email Address', and 'Phone'.

11. For contacts existing in the system, the **Email Address** and **Phone** fields automatically populate.
 - a. These fields will need to be completed for ad-hoc contacts.

The screenshot shows the 'Learning Environments' section with a 'Personalize | Find | View All' header and navigation buttons. It contains a table with the following data:

Learning Environment	Primary
Core Learning Activities	<input checked="" type="checkbox"/>

Below the table are buttons for 'Save', 'Refresh', 'Add', and 'Update/Display', along with a 'Send Email' button.

12. Confirm the correct learning environment is showing in the **Learning Environments** section.

13. To add additional learning environments, click the **Plus Sign** button.

A facility must be associated with at least one learning environment. The system displays the administrator's current learning environment as the default. If more than one learning environment exists and a learning environment is removed, the primary learning environment will automatically default to a remaining learning environment. The primary learning environment can be changed at any time.

14. Click the **Equipment and Attachments** link.

15. Click the equipment **Description** Magnifying Glass button to the left of the **Description** field in the **Facility Equipment** section to search for facility equipment.

16. Enter search criteria to locate equipment.

17. Search for an equipment type or select an entry in the list of values.

18. To add a facility document attachment, click the **Add Attachment** button (to remove attachments, check the checkbox to the left of the attachment and click the **Delete Attachment** button).



19. Clicking the **Add Attachment** button, will allow you to browse and upload personal computer files as attachments. Click the **Browse** button to locate the file and the **Upload** button to add the attachment.

20. Click the **Rooms** tab.

21. Facility rooms available for scheduling will appear in the **Rooms** section.

22. Click the **Add Room** button to add a room to a facility location (to remove rooms, check the checkbox to the left of the room and click the **Delete Room** button).



23. To add a room location, click the **Room Type** drop-down menu button.

24. Enter the room number into the **Room Number** field.

25. Enter the room name (such as PeopleSoft Lab, GMIS Training, Conference Center, etc.) into the **Room Name** field.

26. Enter the facility name into the **Building Name** field.

27. Enter the floor number into the **Floor Number** field.

28. Enter the room's maximum occupancy into the **Max Occupancy** field.

29. Confirm the room status or click the **Room Status** drop-down menu button to select the correct room status from the list of values.

30. Click the **Apply** button.

31. Click the **OK** button.
32. Click the **Save** button.

User Profiles

Lesson 19: Add/Update External Learner Profile

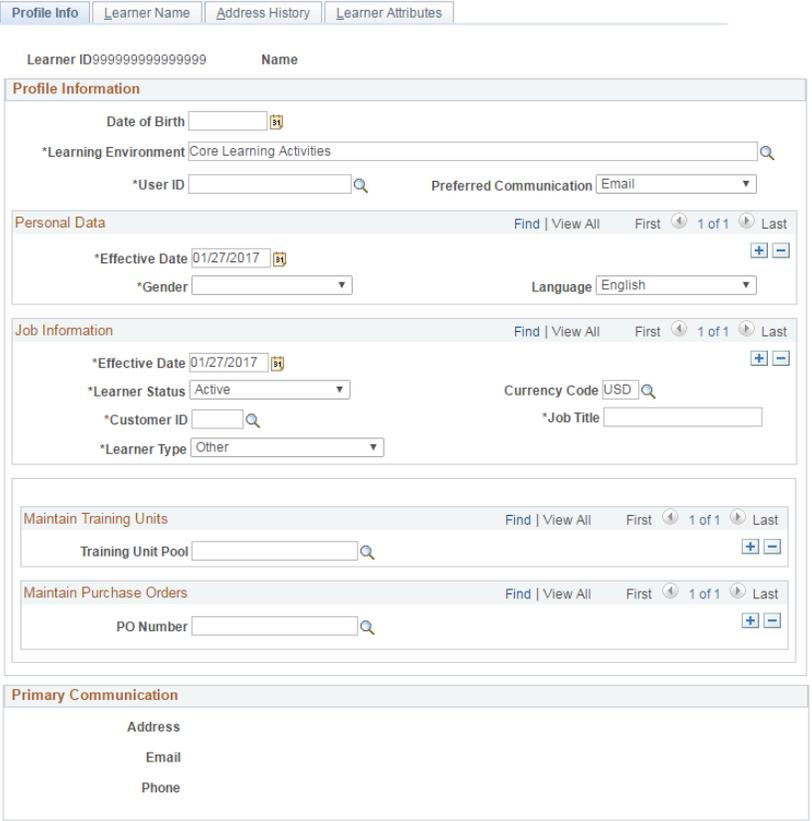
Lesson 20: Add/Update Instructor Profile

Lesson 19 - Add/Update an External Learner Profile

1. Click **Enterprise Learning>User Profiles>External Learners**.
2. Click the **Add a New Value** tab.
3. Click the **Learner Name** tab.
4. Click the **Type of Name** list.
5. Click the **Primary** list course.
6. Click in the **Effective Date** field.
7. Enter the information into the **First Name** field.
8. Enter the information into the **Middle Name** field.
9. Enter the information into the **Last Name** field.
10. Click the **Refresh the Name Field** button.
11. Click the **Profile Info** tab.
12. Click the **User ID** magnifying glass button.
 - a. Click in the **Description** field.
 - b. Enter the information into the **Description** field.
 - c. Click the **Look Up** button.
 - d. Click an entry in the **Description** column.
13. Click the **Gender** list.

The screenshot shows the 'Name Type' form in the Oracle PeopleSoft system. The form is titled 'Name Type' and includes a 'Name History' section. The 'Type of Name' dropdown is set to 'Primary'. The 'Effective Date' is 01/27/2017. The 'Format for Country' is USA, with 'United States' displayed. The 'Person Name' section contains fields for Prefix, First Name, Middle Name, Last Name, and Name Suffix. A 'Refresh the Name Field' button is located below these fields. At the bottom of the form, there are buttons for 'Save', 'Add', 'Update/Display', and 'Correct History'.

14. Click the **Customer ID** magnifying glass button
 - a. Click an entry in the **Customer ID** column.
15. Click in the Job Title field.
 - a. Enter the information into the **Job Title** field.
16. Click the **Address History** tab.
17. Select and address type from the **Address Type** drop down menu.
18. Verify the **Effective Date** field is correct.
19. Click the **Edit Address** link.
 - a. Enter the desired information into the **Address** fields
20. Click the **OK** button.
21. Select a phone number type from the **Phone Type** drop down menu.
 - a. Enter the information into the **Phone** field.
 - b. To add more phone numbers, select the **plus sign**  button
22. Click the **Primary** option.
23. Select an email type from the **Email Type** drop down menu.
 - a. Enter the desired information into the **Email Address** field.
 - b. To add more email addresses, select the **plus sign**  button.
24. Click the **Primary** option.
25. Click the **Save** button.



The screenshot displays the 'Learner Profile' page in the Oracle PeopleSoft Enterprise SPD 9.2 ELM Training Administration system. The page is organized into several sections, each with a 'Find | View All' link and navigation controls (First, 1 of 1, Last). The sections include:

- Profile Information:** Fields for Date of Birth, *Learning Environment (Core Learning Activities), *User ID, and Preferred Communication (Email).
- Personal Data:** Fields for *Effective Date (01/27/2017), *Gender, and Language (English).
- Job Information:** Fields for *Effective Date (01/27/2017), *Learner Status (Active), Currency Code (USD), *Customer ID, *Learner Type (Other), and Job Title.
- Maintain Training Units:** Field for Training Unit Pool.
- Maintain Purchase Orders:** Field for PO Number.
- Primary Communication:** Fields for Address, Email, and Phone.

Lesson 20 - Add/Update an Instructor Profile

1. Click the **Enterprise Learning>User Profiles>Instructors**.
2. Click the **Add a New Value** tab.
3. Select the **Learner ID** magnifying glass button.

To search for existing data, click the **Search** or **Look Up** button to see a complete or partial list of courses associated with the search criteria. At times, PeopleSoft may only return the first 300 courses for undefined searches. To locate courses in lists with more than 300 courses, the search criteria will need to be further defined.

To further define search criteria:

Enter specific search information into one of the search option fields. When available, the **drop-down menu** button options, **magnifying glass** button, and the **calendar button** features will assist with narrowing the search for specific data and/or assist with setting search parameters.

4. Search for instructor using the search options given.
5. Click the **Look Up** button.
6. Click the **Add** button.
7. Ensure instructor **Status** is **Active**.

Field titles beginning with an asterisk (*) are required fields that must be completed.

8. Use the **Course Name** magnifying glass button to search for classes the instructor will be conducting.
 - a. To add additional classes, select the **plus sign**  button.
9. Use the **Facility** magnifying glass button to search for facilities which the class will be held.
 - a. To add additional facilities, select the **plus sign**  button.
10. Click the **Save** button.