

# Oracle Fusion Cloud Talent Management

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**Using Learning**

22D



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# Get Help

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

## Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

## Get Support

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

## Get Training

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

## Join Our Community

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

## Learn About Accessibility

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

## Share Your Feedback

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

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

Thanks for helping us improve our user assistance!



# 1 Guide and Application Overviews

## About the Using Oracle Fusion Cloud Learning Guide

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

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

## What's Oracle Learning

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

- Learning administrators can deploy and track compliance and development-based learning.
- HR specialists can manage a learning catalog and meet compliance needs across the entire organization.
- Learning specialists can assemble online offerings, courses, and specializations. They do this using videos, PDF documents, web links, and content from external providers. They can also use SCORM-compliant and AICC-compliant content.
- Subject matter experts can easily share their knowledge with the rest of your organization, and gain recognition for their contributions.
- Managers can recommend learning to their teams and track their progress.
- Learners across your organization can discover, consume, publish, and collaborate on content that's relevant to their job roles. They can also consume learning offline by downloading content to their mobile devices.

## Additional Reading

As well as this guide, you can also review the Oracle Learning technical briefs. They're on the All Fusion HCM Cloud Product Papers page (document ID [1504483.1](#)).



## 2 Key Terminology

### Course Definition for Oracle Learning

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

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

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

Typically, the course syllabus includes these objectives.

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

### Course Offerings Definition for Oracle Learning

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

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

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

**Course: Microsoft Word Basics**

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

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

Offering: 3-day self-paced in Spanish Enrolled

## Learning Activities Definition for Oracle Learning

Learning activities are the actual work that learners must complete to complete the course and achieve the learning objectives. They can be required or optional for course completion.

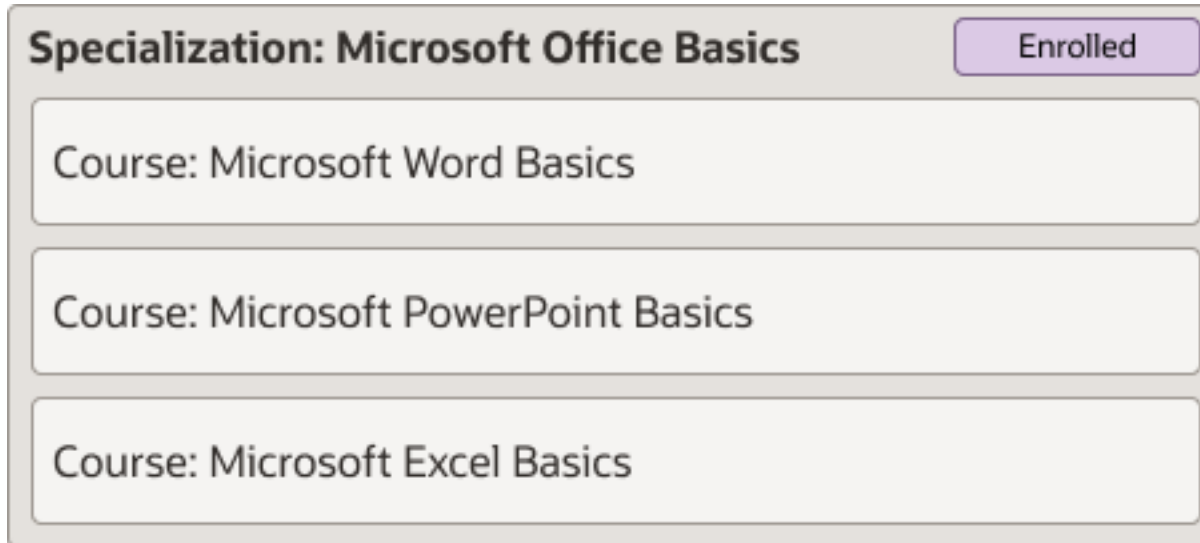
Learning activities can include these types of content:

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

## Specialization Definition for Oracle Learning

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

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



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

And the specialization includes these learning objectives:

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

Typically the specialization description includes these objectives.

## Prerequisites Definition for Oracle Learning

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

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

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

**Specialization: Advanced Microsoft Office** Enrolled

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

**Course: Advanced Microsoft Word**

**Prerequisite: Intermediate experience with Microsoft Word**

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

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

Offering: 3-day self-paced in Spanish Enrolled

Course: Microsoft PowerPoint Basics

Course: Microsoft Excel Basics

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

## Learning Outcomes Definition for Oracle Learning

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

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



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

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

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

Offering: 3-day self-paced in Spanish Enrolled

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

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

Course: Microsoft Word Basics

Course: Microsoft PowerPoint Basics

Course: Microsoft Excel Basics

## Assessment Definition for Oracle Learning

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

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

## Evaluation Definition for Oracle Learning

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

## Learning Communities Definition for Oracle Learning

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

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

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

# 3 Prerequisites and Learning Outcomes for Courses and Specializations

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

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

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

### *Related Topics*

- [Prerequisites Definition for Oracle Learning](#)
- [Learning Outcomes Definition for Oracle Learning](#)
- [Overview of Dynamic Skills](#)

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

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

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

### *Related Topics*

- [Prerequisites Definition for Oracle Learning](#)

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

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

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

These are the Display options you can select from:

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

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

#### *Related Topics*

- [Learning Outcomes Definition for Oracle Learning](#)

# 4 Enrollment Questionnaires, Assessments, and Evaluations

## Configure Enrollment, Assessment, and Evaluation Questionnaires for Oracle Learning

You can get important information about course enrollees and test their understanding of course materials. And you can get their feedback about the self-paced, instructor-led, or blended course offering that they completed.

### Before you start

Make sure that you have these privileges, which aren't part of the Learning Specialist abstract role by default:

- Manage Questionnaire Templates
- Manage Questionnaires
- Manage Questions

For details, see the Security Reference for HCM guide on [Oracle Help Center](#).

Enrollment questionnaires, assessments, and evaluations are all questionnaires. Here's the basic process to create them. The tasks are in the Setup and Maintenance work area, Workforce Development offering, Questionnaires functional area.

### Here's what to do

1. Create questions that appear in the learning questionnaires using the Question Library task. Be sure to select the appropriate subscriber, either **Learning Assessments**, **Learning Enrollments**, or **Learning Evaluations**.  
To use the response scores to calculate the score of questionnaires configured for scoring, select **Score Question**. This option is available for only single-choice and multiple-choice questions.

**Note:** Only learning administrators can see feedback for responses. Learners can't see it.

2. Create a learning questionnaire template using the Questionnaire Templates task. The template is the foundation of questionnaires and helps ensure consistency across all of your learning questionnaires. For example, it can provide

default settings or enforce requirements, such as specific sections and questions that all questionnaires created from the template must have.

Be sure to select the appropriate subscriber, either **Learning Assessments**, **Learning Enrollments**, or **Learning Evaluations**.

Basic Information stop configuration tips:

- To let learners see their scores, you need to select the **Score Questionnaire** option.
- To let the assessment requestor provide additional instructions or notes to learners, select the **Allow changes to instructions** option. The questionnaires created with the template then show the changed instructions.

Contents stop configuration tip:

- To specify whether to show questions in a single section or separate sections use the Section Presentation field. If you have them in separate sections, you can use the Section Order field to specify if the section order is sequential or random. If you have a single section, you need to select **Sequential**.

Review stop configuration tip:

- To make the template available to people creating questionnaires, in the Status field, select **Active**.

3. Create a questionnaire using the Questionnaires task. Be sure to select the appropriate subscriber, either **Learning Assessments**, **Learning Enrollments**, or **Learning Evaluations**. The subscriber filters the templates you can select from when you create the questionnaire. It also determines if you can add the questionnaire to a course or offering.

Review stop configuration tips:

- To see how the questionnaire appears to learners, click **Preview**.
- To make the questionnaire available to people creating courses and offerings, in the Status field, select **Active**.

## What to do next

- [Set Default Evaluations for Oracle Learning Course Offerings](#)
- [Add an Assessment to Your Oracle Learning Content Resources](#)

## Related Topics

- [Assessment Definition for Oracle Learning](#)
- [Evaluation Definition for Oracle Learning](#)
- [How You Create Questions](#)
- [How You Configure Questionnaire Templates](#)
- [How You Create a Questionnaire](#)

# Set Default Evaluations for Oracle Learning Course Offerings

You can set a default evaluation for each type of learning offering: blended, instructor-led, and self-paced.

## Before you start

*Configure Enrollment, Assessment, and Evaluation Questionnaires for Oracle Learning.*

**Here's what to do**

1. On the **My Client Groups > Learning** page, click **Configure Evaluations**.
2. To make changes to the current settings, on the Configure Evaluations page, click **Edit**.
3. In the appropriate sections, complete these steps:
  - a. Select the **Enable evaluation** option.
  - b. Click **Add Evaluation**.
  - c. On the search dialog box, search for and apply the appropriate questionnaire. The list contains only Learner Evaluation type questionnaires.
  - d. To see how the questionnaire appears to learners, click **Preview**.
  - e. To require that learners complete the evaluation before changing the offering status to **Complete**, in the Required for Completion field, select **Yes**. People enabling evaluations for offerings can't override this setting when they use the default evaluation.
4. Click **Save**.

**What to do next**

*Add an Evaluation to an Oracle Learning Offering*



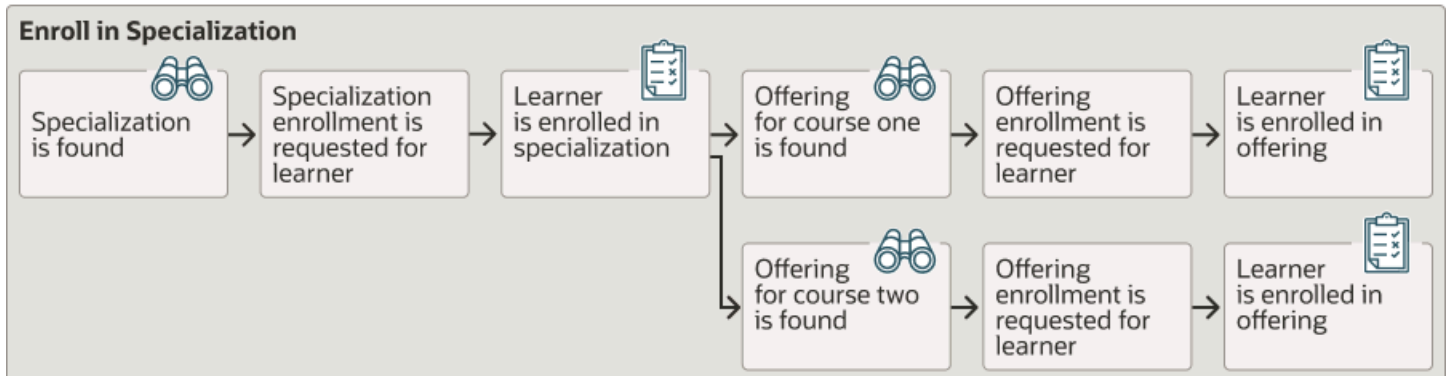
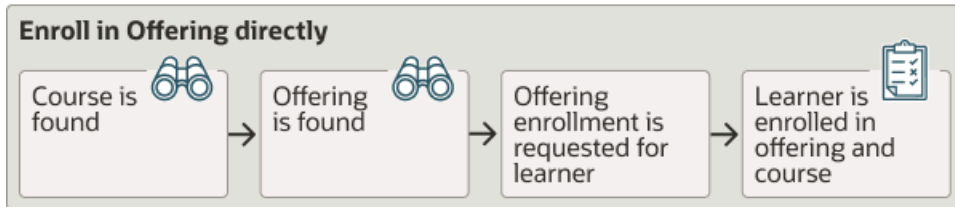
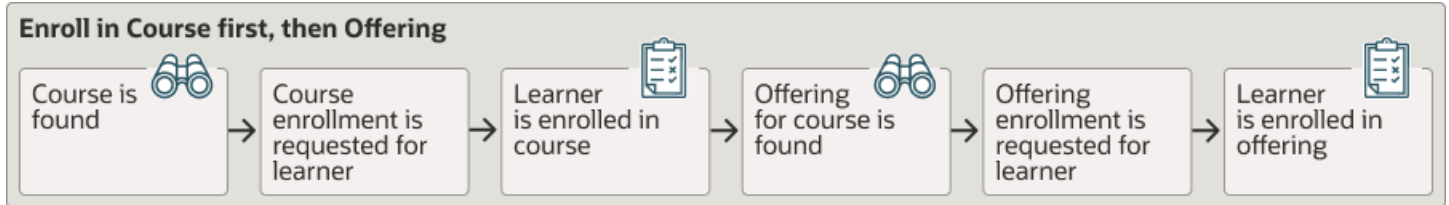


# 5 Defaults and Overrides for Learning Access and Enrollment

## Default Access and Enrollment for Oracle Learning Catalog Content

To create the appropriate enrollment flows and a great learning experience, configure access and enrollment defaults for learning administrators, line managers, and learners.

More specifically, the view mode determines whether learners can even find a cour



**Key:**

- Access controlled with View Mode selection
- Access controlled with Enrollment settings

These defaults apply when you create and edit courses, offerings, specializations. They also apply when you add learner access and access groups.

**Tip:** Any changes to these catalog defaults apply only to courses, offerings, specializations, access, and access groups created after the changes.

Use the Configure Catalog Defaults task on the **My Client Groups > Learning** page.

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

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

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

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

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

### Related Topics

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

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

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

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

- If you're on the Access tab, the relevant learners get determined as soon as you save the access details. And that set of learners remains static, never changing.
- If you're on the Access Group tab, the Process User Access process dynamically determines the learners when it runs at its scheduled intervals. The process adds and removes learners to and from the group according to whether they still meet the specified criteria. For example, you create an access group for a specific organization. The learners in that group change over time as people join and leave the organization.

#### *Related Topics*

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

## How Oracle Learning Access Is Determined

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

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

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

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

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

#### *Related Topics*

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

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

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

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

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

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

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

- **Details View:** Show learners all of the details for the course, offering, or specialization.
- **No Access:** Prevent learners from finding the course, offering, or specialization when exploring the learning catalog.  
  
**Tip:** You can grant specific learners access to the course, offering, or specialization, but you can't exclude access for specific learners. So when you want only certain learners to see the course, offering, or specialization, you need to select **No Access** for that learning item. Then configure access or access groups for the learning item to show the details or summary view to those learners, as appropriate.
- **Summary View:** Show learners a subset of the course, offering, or specialization details before they enroll. Show them all of the information after they're enrolled.

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

## Course Override Options

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

## Specialization Override Option

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

### Related Topics

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

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

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

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

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

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

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

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

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

*Related Topics*

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

## Prerequisites Options for Default Learning Enrollment in Oracle Learning

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

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

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

*Related Topics*

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





# 7 Example Default Access and Enrollment Configurations

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

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

Default access configuration for the course:

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

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

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

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

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

Default access configuration for the course:

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

Default access configuration for the offering:

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

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

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

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

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

Default access configuration for the course:

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

Default access configuration for the instructor-led offering:

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

Default access configuration for the self-paced offering:

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

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

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

Default access configuration for the course:

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

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

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

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

## Oracle Learning Specialization with Some Offering Enrollments Requiring Approval

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

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

Default access configuration for the course:

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

Default access configuration for the instructor-led offering:

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

Default access configuration for the self-paced offering:

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

Default access configuration for the specialization:

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

Assignment settings for the specialization sections:

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



# 8 Content Resources

## Content Resources for the Oracle Learning Catalog

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

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

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

## How Recorded Attempts for Online and Assessment Content Resources Determines Oracle Learning Statuses

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

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

- If learners reach the specified number of attempts without successfully meeting the mastery score, processing updates their offering activity to a Not Passed status. It does the same for the corresponding learning assignment.
- If learners pass by the specified number of attempts, processing updates their offering activity to a Completed status.

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

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

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

To reset all learner ongoing only or ongoing and completed attempts for SCORM learning content, use the More Actions menu on the content details page.

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

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

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

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

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

## Replace Oracle Learning Content Resources or Add Newer Versions

When PDF, video, SCORM, HACP, or AICC learning content resources change, you can replace the existing content or add the newer content. Learning doesn't version the content, so when you replace it, only the most recent version is available.



## Replace

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

Don't use replace when metadata changes were made in the package. Also, if major parts of a content resource changed, we recommended that you add it as a newer version. Don't replace the existing content. Replacing content items after making significant changes that affect the length or file size could result in assignment errors or other issues.

A replacement affects all associated offering activities, including completed activities. When learners access their completed content after the replacement, they see the newer content and not the content that they completed.

## Add

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

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



# 9 Add, Replace, and Manually Process Content Resources

## Add Online Content to Your Oracle Learning Resources

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

### Before you start

- Make sure that the SCORM or AICC content is in the XML format and packaged in a single .zip file format.
- Make sure that the manifest file is at the root level and not in another folder.
- Make sure that the structure name doesn't include any spaces.

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

### Here's what to do

#### 1. Upload the online content.

- a. On the **My Client Groups > Learning** page, click **Content**.
- b. On the Content page, Add Content menu, select **Add Online Content**.
- c. In the Import Content dialog box, add the .zip file.
- d. Click **Save and Close**.

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

#### 2. Configure the basic, advanced, and related materials properties of the online content you just added.

- a. On the Content page, search for the newly added online content. To see newly added content that might not have finished processing, and thus isn't active yet, change Status to **All**.
- b. Click the content title.
- c. On the content details page, configure the basic, advanced, and related materials properties.
  - By default, the import used the file name as the content title. You can override the title, as appropriate.
  - Content with an **Inactive** status or future start date isn't available for selection when you create learning activities.
  - Make sure that the recorded attempts and mastery score properties are appropriate for the intended learners. The online content needs to get scored for you to see the mastery score properties.
    - o If you don't let learning administrators view learner scores, they see only that the learner passed or failed the assessment. It works the same if you don't let learners view their scores.
    - o To keep learners from sharing their correct answers with other learners, you might not want to let them from review their recorded attempt.
- d. Optionally see the content from a learner perspective. On the More Actions menu, select **Preview**.
- e. Click **Save and Close**.

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

#### Related Topics

- [How Recorded Attempts for Online and Assessment Content Resources Determines Oracle Learning Statuses](#)
- [Replace Oracle Learning Content Resources or Add Newer Versions](#)
- [eLearning Setup Profile Options for Oracle Learning](#)

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

To use video or PDF file content in learning activities, you upload the content as learning catalog resources. Then you optionally update the title and add a description. The maximum supported file size is 1GB.

### Before you start

If you're adding video content, make sure it uses H.264 compression standard and the AAC (Advanced Audio Coding) format.

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Content**.
2. On the Content page, Add Content menu, select **Add Video** or **Add PDF File**.
3. In the Import Content dialog box, add the .zip file. You can see the upload progress here.
4. Optionally override the default title, which is the file name, with a more learner-friendly title.
5. Click **Save and Close**.

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

You can check the status and refresh status of existing video and PDF file content on the Content page using basic and advanced search criteria. To see newly upload content that hasn't finished processing yet, and thus isn't active, change Status to **All**.

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

#### Related Topics

- [Replace Oracle Learning Content Resources or Add Newer Versions](#)

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

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

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

## Add an Assessment to Your Oracle Learning Content Resources

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

### Before you start

*Configure Enrollment, Assessment, and Evaluation Questionnaires for Oracle Learning.*

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Content**.
2. On the Content page, Add Content menu, select **Add Assessment**.
3. On the Add Assessment page, enter a descriptive title.
4. Search for and select the assessment you want to use. The list contains only Learner Assessment type questionnaires.
5. Change the status to **Active**.
6. To identify the period when people can add the assessment to course offerings, select the appropriate start date and optional end date.
7. In the Mastery Score field, enter the minimum score required to pass the assessment. Learners who score below the mastery score for the offering activity get an incomplete for the activity. That **Incomplete** status rolls up to the offering and the course.

8. Optionally complete the remaining fields.
  - o If you enable a time limit, learners see a countdown clock in the assessment. After they start a timed assessment, learners can't save and close the assessment until they submit it or time runs out. When the time runs out, Learning submits and scores the assessment. It then compares the score to the mastery score, to determine if the learner passed or failed the assessment.
    - | **Tip:** When you enter the time limit, you automatically set the expected effort too.
  - o If the selected assessment has points for each question and you want to use them to calculate a passing score, select **Enable passing score**.
  - o If you don't let learning administrators view learner scores, they see only that the learner passed or failed the assessment. It works the same if you don't let learners view their scores.
  - o To keep learners from sharing their correct answers with other learners, you might not want to let them from review their recorded attempt.
9. To see how the assessment appears to learners, on the More Actions menu, select **Preview**.
10. Click **Save and Close**.

#### Related Topics

- [Assessment Definition for Oracle Learning](#)

## Create a Global or Local Access Group for Oracle Learning

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

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

1. On the Global Access Groups page, click **Create**.  
Or for the existing course, offering, or specialization, on the **Learners > Access Groups** tab, select **Add Access Group > Create Local Access Group**.
2. Complete the required general information. This includes adding members.  
To exclude specific individuals when you add learners using learning assignment or person criteria:
  - a. On the criteria dialog box, click **Advanced**.
  - b. On the Add Fields menu button, select the field you want to use to exclude people, for example, **Person Number**.
  - c. Change the condition for the field you added to **Does not equal**.
  - d. Enter the appropriate value.
  - e. Report steps b through d for each individual you want to exclude.  
To exclude people when you use analysis report criteria, make sure that the report logic includes the exclusion criteria. When you select learners using analysis report and organization chart criteria, you can only search for and select the analysis or chart.
3. Review the defaulted access details and make any appropriate changes. Use these topics to help you make the correct choices:

- Initial Learning Record Status Options for Learning Enrollments
  - Prerequisites Options for Learning Enrollments
4. Review the advanced rules. Global and local access groups have the Run As setting. Local access groups also let you set the priority and override pricing and payment defaults.
  5. Save the access group.

#### Related Topics

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

## Import External Content to the Oracle Learning Catalog

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

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

### Before you start

[Configure External Content Providers for Oracle Learning](#)

### Here's what to do

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

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

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

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

### Related Topics

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

## Add Cover Art to Your Oracle Learning Content Resources

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

### Before you start

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

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

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Content**.
2. On the Content page, Add Content menu, select **Add Cover Art**.
3. In the Import Content dialog box, enter a descriptive title.
4. Add the image file.
5. Enter a description.
6. Click **Save and Close**.

## Replace an Oracle Learning Content Resource

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

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



2. Search for and click the name of the content you want to update.
3. On the content details page, copy the Title value.
4. On the More Actions menu, select **Replace**.
5. If you selected SCORM, HACP, or AICC content, a warning that the internal structure of the replacement and existing content must match appears. If the structures match, continue. If they don't, add the content as a new version instead of replacing the existing content.
6. On the Import Replacement Content dialog box, add the replacement file.
7. In the Title field, paste the title you copied in step 3.
8. Click **Save and Close**.  
Replaced videos have a **New** status. You won't be able to view or preview the video until the Video Transcoding and Processing process completes. If you replace a video with one that doesn't have the same duration, the playback may not resume at the expected location.

#### Related Topics

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

## Manually Process Oracle Learning Content Resources That Failed Processing

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

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



# 10 Instructor-Led Training Resources

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

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

### Create an Instructor for Your Oracle Learning Catalog Resources

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

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

#### What to do next

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

### Link an Instructor to a Virtual Classroom Provider

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

#### Before you start

[Configure the Virtual Classroom Provider for Oracle Learning](#)

#### Here's what to do

1. On the **My Client Groups > Learning** page under catalog resources, click **Instructors**.
2. On the Instructors page, search for and click the instructor.
3. On the Edit Instructor page, in the Virtual Accounts section, on the Create menu, select the appropriate virtual classroom provider.

4. On the Create Instructor Provider Account page, complete the account details.  
For Microsoft Teams, the user name that you enter must exist in MS Active Directory for the tenant ID specified in the virtual classroom configuration.
5. To validate the details, click **Validate**.  
For Microsoft Teams, the Product Templates section appears. Learning doesn't use templates, so select **Default**.
6. After validation determines that the details are valid, click **Save and Close**.
7. On the Edit Instructor page, click **Save and Close**.  
The specific features available to instructors depends on the virtual classroom provider.

## View the Oracle Learning Offerings Taught by an Instructor

After you link an instructor to offering activities, you can see the taught offerings on the Edit Resource page, under the instructor details.

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

## Create a Classroom for Your Oracle Learning Catalog Resources

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

### Before you start

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

### Here's what to do

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

### Related Topics

- [Locations Used for Oracle Learning Classroom Resources](#)

## View the Schedule for an Oracle Learning Classroom

After you link a classroom to learning activities, you can see the schedule on the Edit Resource page, under the classroom details.

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

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

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

1. On the **My Client Groups > Learning** page, click **Training Suppliers**.
2. On the Training Suppliers page, click **Create**.
3. On the Create Training Supplier page, complete the required and relevant optional fields.
4. Click **Save and Close**.



# 11 Completion Certificates

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

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

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

## Configure Completion Certificate Templates for Oracle Learning

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

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

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

### What to do next

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

## Set Completion Certificate Defaults for Oracle Learning Courses and Specializations

To provide completion certificates to learners, you need to configure the completion certificate defaults for courses and specializations.

### Before you start

*Configure Completion Certificate Templates for Oracle Learning*

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Configure Catalog Defaults**.
2. On the Configure Catalog Defaults page, in the Completion Certificate Defaults section, click **Edit**.
3. Select the appropriate certificate selection.
  - o **No Certificate** disables the completion certificate. Learners and managers don't get a **Print Completion Certificate** action for the course or specialization.
  - o **Certificate** enables the completion certificate and shows the choice list of available certificates. When you select a specific certificate, you enable the **Preview** link and see the corresponding description.



# 12 Capacity Rules and Waitlists

## Waitlists for Oracle Learning Course Offerings

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

# 13 Course Administration in the Learning Catalog

## Create a Course for the Oracle Learning Catalog

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

1. On the **My Client Groups > Learning** page, click **Courses**.
2. On the Courses page, click **Create**.
3. On the Create Course page, complete the required and relevant optional general information. Learners can see all of this general information when they view course details in the learning catalog and for enrolled courses.  
When you create courses, it automatically generates read-only course numbers. When you upload courses using HCM Data Loader, you can specify your own numbers.
4. Optionally add prerequisites and learning outcomes, such as skills, competencies, honors and awards, languages, licenses and certifications, and memberships. The prerequisites and outcomes you can add, as well as the corresponding properties and choice lists, come from the Prerequisites and Person profile types.  
When learners complete refresher courses before learning outcomes with expiration dates expire, such as certificates and licenses, their outcomes don't get updated. Keep this in mind when you set expiration and renewal dates.
5. Optionally configure default offering attributes that all offerings for the course inherit as default settings. The default attributes you can configure include setting the training instructor or supplier, pricing, payment, and capacity rates. When you configure the related offerings, you can override these course-level defaults.
  - o The primary instructor names come from the people you add using the Instructors catalog resources task.
  - o The training supplier names come from the suppliers you add using the Training Suppliers catalog resource task.
  - o The Pricing section lets you set up internal chargebacks for any incurred learning costs, such as for instructor-led training (ILT) offerings. The pricing configuration applies only after you set Payment Type to **Manual Payment** in the Payment section.
    - Line item options come from the ORA\_WLF\_PRICING\_TYPE lookup.
    - If you select **Required**, learning administrators can modify only the price, when they configure course offerings.
    - The offering price on learning self-service pages gets calculated using all of the line items with **Use to Calculate Catalog Item Price in Self-Service** selected.
6. Optionally link the course to one or more learning communities.
7. Optionally set default learning assignment rules, such as the initial assignment status and the validity period. Learning administrators see these defaults, and can override them, when they create required learning assignments.

### Related Topics

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

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

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

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

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

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

## Add an Enrollment Questionnaire to an Oracle Learning Course

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

### Before you start

1. [Configure Enrollment, Assessment, and Evaluation Questionnaires for Oracle Learning](#)
2. [Create a Course for the Oracle Learning Catalog](#)

### Here's what to do

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

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

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

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

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

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

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

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

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

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

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

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

### *Related Topics*

- [Oracle Learning Deep Links](#)

# 14 Course Offering Administration in the Learning Catalog

## Create an Offering and Activity for Oracle Learning Courses

You can create instructor-led, self-paced, and blended offerings and activities for learning courses. The general information and activity properties you can configure depend on the offering type.

### Before you start

*Create a Course for the Oracle Learning Catalog*

### Here's what to do

1. On the **My Client Groups > Learning** page, click **Offerings**.
2. On the Offerings page, Create menu, select the type of offering you want to create.
3. On the Create Offering: Select Course dialog box, search for and select the appropriate course.
4. Click **Select**.

5. On the Create Offering page, complete the required and relevant optional general information. Learners can see all of this general information when they view offering details in the learning catalog and for enrolled offerings.

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

- The new offering uses the course title by default. If you have multiple offerings for a course, be sure to make the offering title unique.
- The publish dates determine the period when learners can see the offering on their self-service pages. For an ILT or blended offering, you also need to select offering dates, which are typically the first and last dates of the ILT.
- For an ILT or a blended offering, you can set a primary classroom that's the default classroom for the activities. You can override this default when you configure the activities, as appropriate. Learners see the classroom location as city, state or province, and country.
- For an ILT or a blended offering, if you select a facilitator type of Instructor, you also need to select the primary instructor. You can override this default when you configure the activities, as appropriate.

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

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

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

- To avoid meeting errors, make sure that activity dates for ILT activities are after today's date.
- To create multiple occurrences of an activity that repeats, select a Repeat option. If you need to change the activity later, you have to edit each individual occurrence.
- To let learners manage their attendance, instead of the learning coordinator or instructor, select Allow person completing the activity to mark themselves complete.
- Add other resources to include information for reporting and alerts. For example, you create an automated report the day an activity is scheduled to occur. And you send an email to facilities that list required physical resources, such as notebooks and pens.

7. On the Add Activity page, complete the required and relevant optional information.
8. Optionally enable and configure an evaluation.
9. Click **Save and Close**.



### Related Topics

- [Course Offerings Definition for Oracle Learning](#)
- [Learning Activities Definition for Oracle Learning](#)
- [Add Assessments to a Blended or Self-Paced Oracle Learning Offering](#)
- [Add an Evaluation to an Oracle Learning Offering](#)

## Add Assessments to a Blended or Self-Paced Oracle Learning Offering

To test learner understanding of course materials, add assessments as activities for a blended or self-paced learning offering. For anyone to see the assessments, the questionnaire templates used to create them must have the Score Questionnaire option selected.

### Before you start

1. [Configure Enrollment, Assessment, and Evaluation Questionnaires for Oracle Learning](#)
2. [Add an Assessment to Your Oracle Learning Content Resources](#)
3. [Create a Course for the Oracle Learning Catalog](#)
4. [Create an Offering and Activity for Oracle Learning Courses](#)

### Here's what to do

1. On the offering Activities tab, click **Create**.
2. Enter a descriptive title for the assessment activity.
3. Enter a description that informs learners about the purpose of the assessment.
4. In the Offering Content field, search for and select the appropriate assessment. The Content Type value populates automatically based on your selection.
5. Complete any other required fields and applicable optional fields.
6. Click **Close**.
7. Click **Save and Close**.

## Add an Evaluation to an Oracle Learning Offering

To get feedback about the self-paced, instructor-led, or blended course offering a learner completed, you can add an evaluation. For anyone to see the evaluation, the questionnaire template used to create it must have the Score Questionnaire option selected.

### Before you start

1. [Configure Enrollment, Assessment, and Evaluation Questionnaires for Oracle Learning](#)
2. [Set Default Evaluations for Oracle Learning Course Offerings](#)
3. [Create a Course for the Oracle Learning Catalog](#)
4. [Create an Offering and Activity for Oracle Learning Courses](#)

### Here's what to do

1. On the offering Activities tab, click **Enable evaluation**.
2. Specify whether to use the default evaluation or another evaluation. The name of the default evaluation appears as read-only information in the Evaluation field. To help you decide, you can preview the evaluation. If you select another evaluation, you can also preview it.
3. If using an evaluation other than the default, you can specify whether learners need to complete the evaluation before Learning considers the offering complete. If you use the default evaluation, the setting on the Configure Evaluations page applies. You can't override it.
4. Click **Save and Close**.

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

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

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

### Related Topics

- [Oracle Learning Assignments and Recommendations](#)
- [Oracle Learning Initiatives](#)
- [Add Learners to an Oracle Learning Course, Offering, or Specialization](#)

## View a Learner's Most Recent Assessment Attempt or Evaluation for an Oracle Learning Offering

Here's how you can view a learner's latest assessment attempt answers and score as well as their evaluation responses.

1. On the **My Client Groups > Learning** page, click **Offerings**.
2. On the Offerings page, search for and click the offering that contains the assessment or evaluation you want to review.
3. Click **Learners**.
4. Search for and select the learner with the assessment or evaluation you want to view. In the Assignment Status field, be sure to select **Completed** to see only the learners who completed the assessment or evaluation.
5. Click **Manage Activities**.
6. On the Activities dialog box next to the offering name, click the information icon.
7. In the activity dialog box, click **View**.  
You can see only the most recent assessment attempt. Earlier assessment attempts aren't available.

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

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

### Here's what to do

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

### Results:

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

### Related Topics

- [How Recorded Attempts for Online and Assessment Content Resources Determines Oracle Learning Statuses](#)

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

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

### Related Topics

- [Configure Enrollment, Assessment, and Evaluation Questionnaires for Oracle Learning](#)
- [Add an Assessment to Your Oracle Learning Content Resources](#)

## Why Keep an Oracle Learning Offering Overbooked

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

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



# 15 Specialization Administration in the Learning Catalog

## Create a Specialization for the Oracle Learning Catalog

Create the learning plan or path for the larger learning objective and add relevant courses and activities. You can change the sequence of added courses, as appropriate. Specializations refer to courses as sections.

### Before you start

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

### Here's what to do

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

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

4. Add at least one section.

When you add sections to a specialization, it automatically generates read-only section numbers. When you upload specializations using HCM Data Loader, you can specify your own section numbers.

- a. Complete all required information and relevant optional information. Also review default values and change them, as appropriate. You can always edit section information later, after you add the activities. Use these descriptions of the Initial Assignment Status of Activities options, to help you make the appropriate selection. Specialization activities are actually courses in your learning catalog.
  - **Active:** Learners enrolled in this specialization can sign up for courses in this specialization, regardless of the course configuration.
  - **Inherit from Course:** Learners see the same behavior for the course, whether they access the course directly or through the specialization.
  - **Inherit from Specialization:** Learners see the same behavior that they had for the specialization enrollment, for example, **Request mode** or **Active mode**.
  - **Requested:** When they try to join, learners need to request the courses in this section, regardless of the course configuration.
- b. Add at least one activity.

**Tip:** You can reposition sections using the Place Section After field on the Edit Section dialog box.

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

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

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

#### *Related Topics*

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

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

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

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

# 16 Community Administration

## Oracle Learning Communities

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

Here are examples of different learning communities:

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

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

## Oracle Learning Communities Types, Content, Contributions, and Assignments

You create hierarchies with category and topic communities that learners use when browsing the learning catalog. You give learners access to relevant content in an automated way with official communities. And learners share their knowledge with peers using self-service communities.

You can enable learners to browse the learning catalog in a structured way by creating category and topic communities. For example, to help learners find content about Microsoft Office, you create these topic communities: Microsoft Word, Microsoft Excel, Microsoft PowerPoint, and Microsoft Outlook. Then you add relevant learning catalog content to the community catalog. Next you create a Microsoft Office category community and include your Microsoft topic communities.

**Tip:** You determine how learners can browse the learning catalog using the Configure Self-Service task on the **My Client Groups > Learning** page. This includes letting them browse by categories.

Characteristic	Description
Create and manage	Use the Communities task on the <b>My Client Groups &gt; Learning</b> page.
Member contributions	Disabled
Related materials	Not available
Assignments	Not available
Catalog	Category: Can contain topic and official communities and let only learning administrators have conversations.  Topic: Can contain official communities, self-service communities, courses, specializations, videos, and learning journeys. They can't contain other topic communities to convey subtopics.
Conversations	Category: Can configure for only learning administrator conversations.  Topic: Can configure both learning administrator conversations and self-service (member) conversations.
Self-service pages	Don't list these communities.

You can give members access to relevant organization-provided content by creating official communities. You can also automate assignments for required members. And depending on the community setup, members can collaborate and possibly provide content. For example, to give new hires access to initial training and relevant documents, you create the official Onboarding community.

Individuals can use their initiative to share their knowledge with colleagues by creating self-service communities. For example, an individual in a retail chain store creates the Holiday Decorations self-service community so that members across stores can inspire each other. Members can create and share short videos that describe what they did and why.

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

Characteristic	Description
Create and manage	Official: Use the Communities task on the <b>My Client Groups &gt; Learning</b> page. Self-service: From the <b>Me &gt; Learning</b> page. You can also manage them from the <b>My Client Groups &gt; Learning</b> page.
Member contributions	Learning administrators and community managers can enable for all members or no members.  <b>Tip:</b> Videos and learning journeys self-published by the community manager have the community name as the contributor, instead of the person's name.
Related materials	Can add attachments.
Assignments	Learning administrators and community managers can create assignments that existing and future required members need to complete by the specified due date. Assignments are most relevant in official communities.  Learning administrators can also manage assignments using the Learning Assignments task.



Characteristic	Description
Catalog	Can contain official communities, self-service communities, courses, specializations, videos, and learning journeys.
Conversations	Can configure both learning administrator conversations and self-service (member) conversations.
Self-service pages	List these communities.

You can set the privacy of all communities to one of these options:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## Oracle Learning Community Membership and Managers

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

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

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

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

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

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

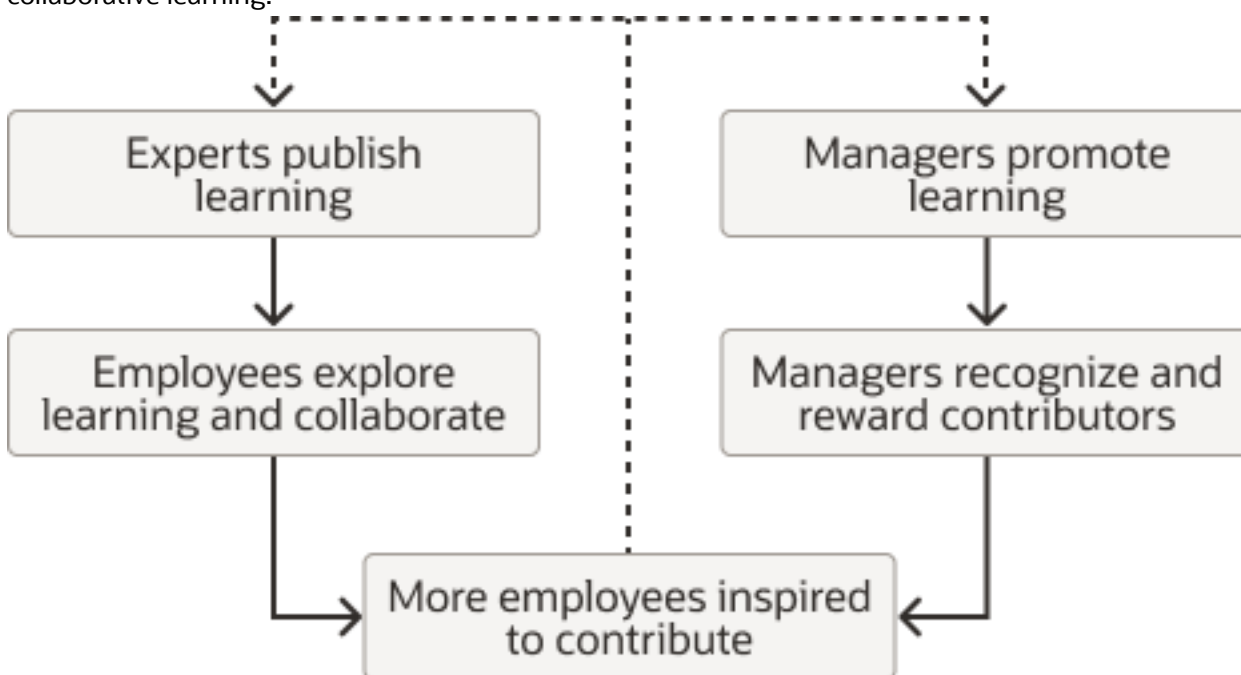
# 17 Learner-Created Catalog Content

## Foster Collaborative Learning and Knowledge Sharing

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

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

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



### Remove Barriers to Publication

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

### Encourage Collaboration

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

- Require their teams to complete certain learning items.

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

## Recognize and Reward Contributors

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

## Train on Content Creation

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

### *Related Topics*

- [Oracle Learning Communities](#)
- [Assign Learning to Your Team](#)
- [Track Completion of Team Learning](#)

## Share Solutions to Promote Collaborative Learning

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

## Share Best Practices to Promote Collaborative Learning

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

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

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

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

# The Difference Between an Oracle Learning Video and Journey

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

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

## Author an Oracle Learning Journey

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

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

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

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

## Publish an Oracle Learning Video

You can share your knowledge by publishing learning videos.

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

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

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

# 18 Learning Assignments and Recommendations Administration

## Oracle Learning Assignments and Recommendations

Assign learners to a course, offering, specialization, or noncatalog learning item. The assignment can be voluntary or required. Recommend learning, and change assignment and recommendation statuses. And view approvals, send emails and alerts, and apply mass actions.

- **Required:** Learners need to complete the learning, typically as a condition of their continued employment. Learning administrators create these learning assignments to make sure that learners comply with company policies. For example, all employees need to complete an ethics course every year.
- **Voluntary:** Learners can complete the learning or not. There aren't any consequences if they don't. Learners typically create these learning assignments when they enroll in a learning catalog item or add noncatalog learning to their learning history. Learners also create these types of assignments when they enroll in recommended learning.
- **Recommendations:** Optional learning that peers, managers, and learning administrators suggest based on what they know about the learner. Learners decide whether they want to enroll in and complete recommended learning. They can immediately dismiss any recommendations they're not interested in. For recommendations they want to pursue, they can enroll in the learning. After the learning becomes active, they need to manually dismiss the recommendation to remove it from their list.

Learners can't have multiple assignments of different types for the same learning item, at the same time. For example, they can't have both a required and a voluntary assignment, or two required or two voluntary assignments for the same offering.

Assign and manage learning using the Learning Assignments task or the tabs of an existing course, offering, or specialization.

### *Related Topics*

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

## Configure Learner Defaults for Oracle Learning Assignments

Default the most common Assign As option, due date, and With this note text for new learning assignments. Let learning administrators select learners by workforce structure hierarchy. And configure summary metrics for the Learning Assignment tabs and page.

**Tip:** The Completed count doesn't include learning assignments with a Bypass Completed status. To get a learner count for that status edit the summary metrics and on the Summary # Assignment Status menu, select Bypass Complete.

## Add Learners to an Oracle Learning Course, Offering, or Specialization

Add learners to a course, offering, or specialization using the Courses, Offerings, Specialization, and Learning Assignment tasks on the **My Client Groups > Learning** page. The learning assignments can be voluntary or required. Or you can create learning recommendations.

1. On the Courses, Offering, or Specialization page, search for and select the learning item you want to add learners to. Then click the **Learners** button to open the learning item details page on the **Learners > Learning Assignments** tab.  
Or use the Learning Assignments task to open the Learning Assignments page.
2. On the Add Learners menu, select the assignment type--**Voluntary** or **Required**, or select **Recommendations**.
3. On the dialog box, Enrollment Details page, complete the required and relevant optional fields.
  - o The start date is when the learners see the learning item in their current learning. If you need to start the assignment on a past date, use HCM Data Loader.
  - o Optionally complete any enabled learning request descriptive flexfields.

These fields are specific to assignments that you create with the Learning Assignments task.

- o Only learning administrators see the required name and optional description.
  - o The Request Type section fields that you need to complete depend on whether the assignment is for a catalog learning item or noncatalog item. Noncatalog items are external learning that you want to record in a learner's history, such as a completed college course.
4. Click **Next**.
  5. On the Select Learners page, Add menu, select the method to use for selecting learners, such as **Person**, **Analysis Report Criteria**, or **Learning Assignment Criteria**. Alternatively, you can use the Add a Person field.
  6. On the dialog box, search for and select the criteria to find the appropriate learners for the assignment. What you see depends on your selection method.

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

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

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

7. For recommendations, skip to step 9. For required and voluntary assignments, click **Next**.



8. On the Advanced Rules page, review the default rules for the learning assignment and make changes, as appropriate.

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

9. Click **Submit**.

#### Related Topics

- [Initial Learning Record Status Options for Default Learning Enrollment in Oracle Learning](#)
- [Prerequisites Options for Default Learning Enrollment in Oracle Learning](#)
- [Validity Periods and Expiration and Renewal Options for Oracle Learning Courses and Required Learning Assignments](#)

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

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

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

## Validity Periods and Expiration and Renewal Options for Oracle Learning Courses and Required Learning Assignments

The time when a learner's course status shows as Completed is the validity period. By default, the period becomes effective after a learner successfully completes the course and never expires. You can set other expiration and renewal options as appropriate.

The validity period can start after either the due date or completion date of the course offering, or a set period before the expiration.

- **Do not create a renewal assignment:** After the learner completes this onetime assignment, they won't get any other assignments for this learning.
- **Start next renewal after due date of prior assignment:** It doesn't matter if the learner completed the course offering before or after the due date. The validity period starts from the due date. This option is useful when you want to keep all assigned learners, on the same renewal cycle. For example, you want everyone to complete your general health and safety course each year, during the same period. You can also proactively manage any changes to the course offerings because you know when people will and won't be working through the content.
- **Start next renewal after completion of prior assignment:** The validity period is unique to each learner who completes the course. They get their next renewal assignment immediately after they complete their current assignment.
- **Start next renewal before validity of prior assignment ends:** It doesn't matter if the learner completed the course offering before or after the due date. The validity period starts the specified number of days before the initial assignment expiration. Like the After Due Date option, you can keep all assigned learners on the same renewal cycle and proactively manage changes to the course offerings.

The period can end on a set date or never. It can also end a specified number of days or years after the validity period start.

**Tip:** You set validity period options for only required learning assignments. They aren't available for voluntary and recommendation learning assignments.

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

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

You can also send alerts to multiple learners or everyone in the learner results using the Mass Actions option.

## Activate and Bypass Multiple Oracle Learning Assignments

You can activate multiple learning assignments at the same time. You can also bypass and approve, reject, or complete multiple assignments. Use the Mass Actions button on the Learning Assignments tabs or page.

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

#### Related Topics

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

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

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

### Microsoft Excel Assignments

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

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

### Notepad Assignments

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



# 19 Learning Assignment Statuses and Life Cycles

## Proactive Statuses for Oracle Learning Assignments

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

Proactive Assignment Status	Type of Learning Item	Description
Requested	Course Offering Specialization Noncatalog	The requested learning was submitted for approval.
Request Approved	Course Offering Specialization Noncatalog	A learning administrator needs to manually activate the assignment before the learner can start the learning or get waitlisted.  Assignments have this status only if the access control rules don't automatically activate the enrollment after approval.
Pending Active	Course Offering	A learning administrator needs to manually activate the learning assignment before the learner can start the learning activities or get added to the waitlist.
Pending Fulfillment	Course Offering Specialization	A learning administrator needs to add the approved learning to the learning catalog and activate it. If it's already in the catalog, they just need to activate it. Then they need to manually activate the learning assignment.
Pending Prerequisites	Course Offering Specialization	The learner needs to achieve the prerequisites in the period specified in the enrollment access controls. Then they can start the learning or get added to the waitlist.
Waitlisted	Offering	The learner is on the offering waitlist because enrollment is already at capacity.

## Active Statuses for Oracle Learning Assignments

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

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

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

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

# Completed and Other Terminal Statuses for Oracle Learning Assignments

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

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

Completed Assignment Status	Type of Learning Item	Description
Completed	Course Offering Specialization	Automatically set after the learner completes all required activities for the specialization or offering. You can also manually set this status, as appropriate.  Completed assignments have completion details. This indicates that Oracle Learning orchestrated the learning activities.
Bypass Completed	Course Specialization Noncatalog	The learning administrator determined that the learner the completed equivalent learning, and thus credits them for completing this assignment.  Bypass completed assignments don't have completion details. This indicates that Oracle Learning didn't orchestrate the completion.
Not Passed	Course Offering	The learner didn't meet the completion criteria for an offering activity.  When an activity gets set to Not Passed, the offering status also gets set to Not Passed.  Learners can't attempt any additional offering activities. To let learners complete only one of multiple activities, be sure to set the first offering activity to Exempted instead of Not Passed.

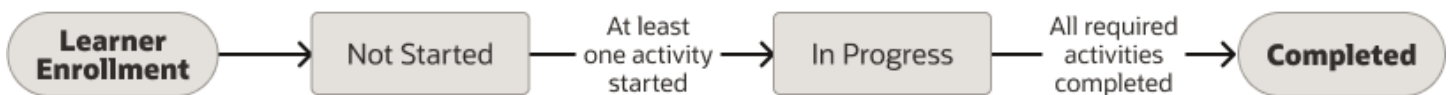
Other Terminal Assignment Status	Type of Learning Item	Description
Completion Request Rejected	Noncatalog	The approver didn't consider the learning complete.
Deleted	Course Offering	A learning administrator deleted the learning assignment so that it won't appear in the learner's learning history.

Other Terminal Assignment Status	Type of Learning Item	Description
	Specialization	To permanently purge deleted assignments so that even learning administrators no longer see them, you can use HCM Data Loader.
Request Rejected	Course Offering Specialization Noncatalog	The approver rejected the learning request.
Withdrawn	Course Offering Specialization	The Not Started or In Progress learning request was withdrawn.

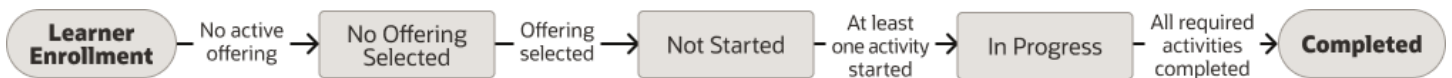
## Course Assignment Life Cycle Examples for Oracle Learning

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

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



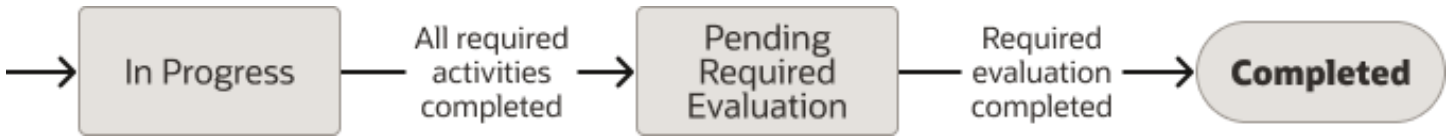
The life cycle is slightly different when a learner enrolls or is enrolled in a course. They need to select an offering before they complete their learning. As shown here, the initial assignment status is No Offering Selected. After the learner selects an offering, the assignment status changes to Not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



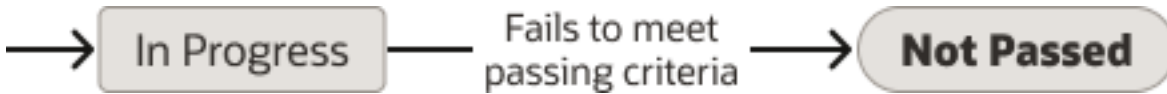
The assignment life cycle expands when the learning includes completion options. Previously the assignment statuses moved from In Progress to Completed after the learner completed all required activities. When learning includes completion options, such as requiring an evaluation as shown here, the assignment status moves from In Progress to



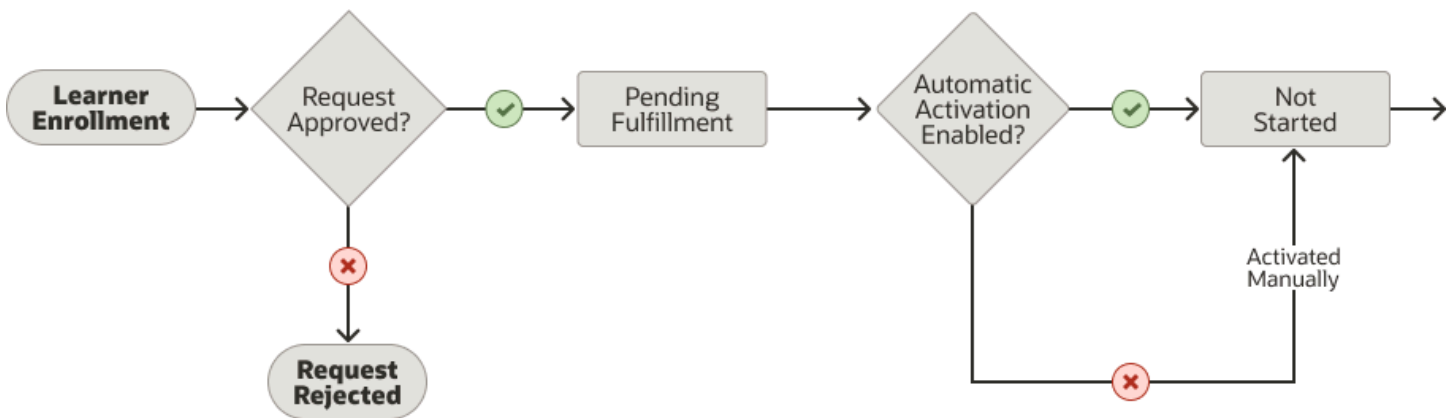
Pending Required Evaluation. Only after the learner completes the evaluation does the status move to Completed and the life cycle ends.



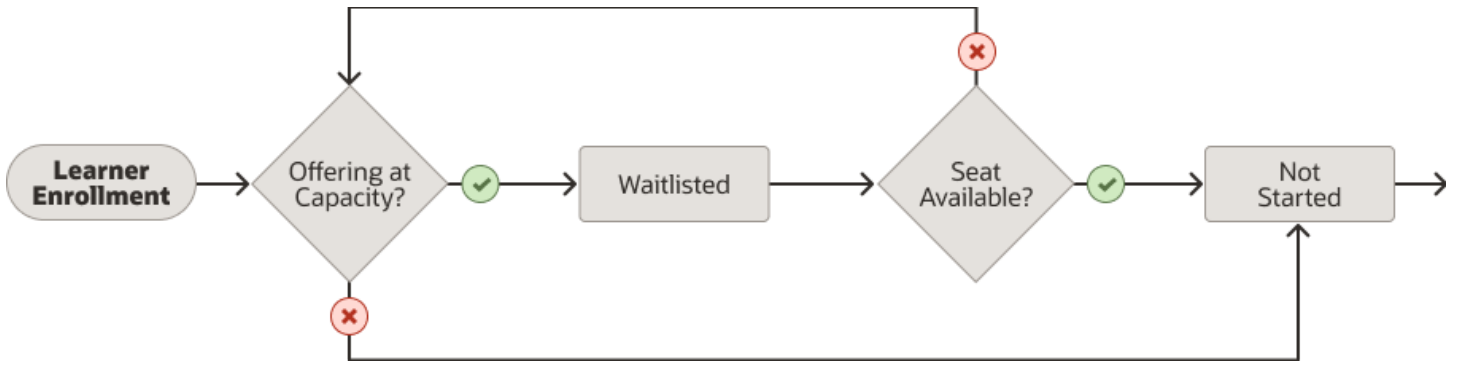
The end of an assignment life cycle changes for self-paced offering activities with completion options that include passing criteria and a certain number of attempts. If the learner fails to pass an offering activity in the allowed number of attempts, the assignment status moves from In Progress to Not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



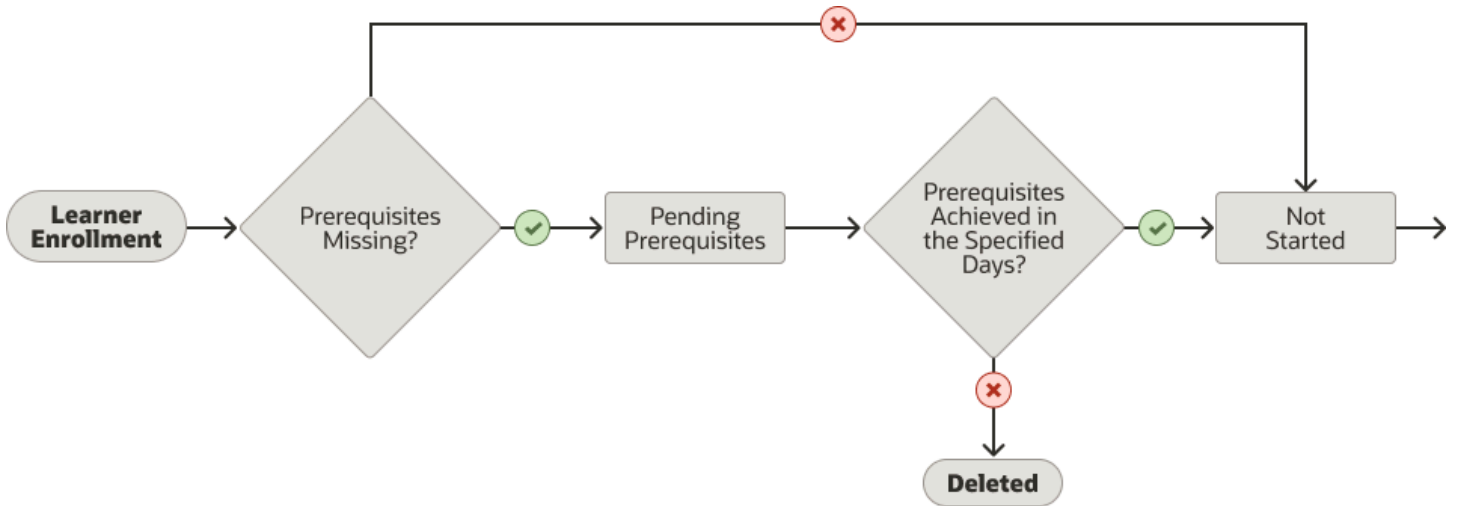
The assignment life cycle expands when the learning includes enrollment options, such as approvals. As shown here, when the learner enrolls or is enrolled in a course offering configured with approvals, the approvers get an enrollment request. If they reject the request, the assignment status changes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



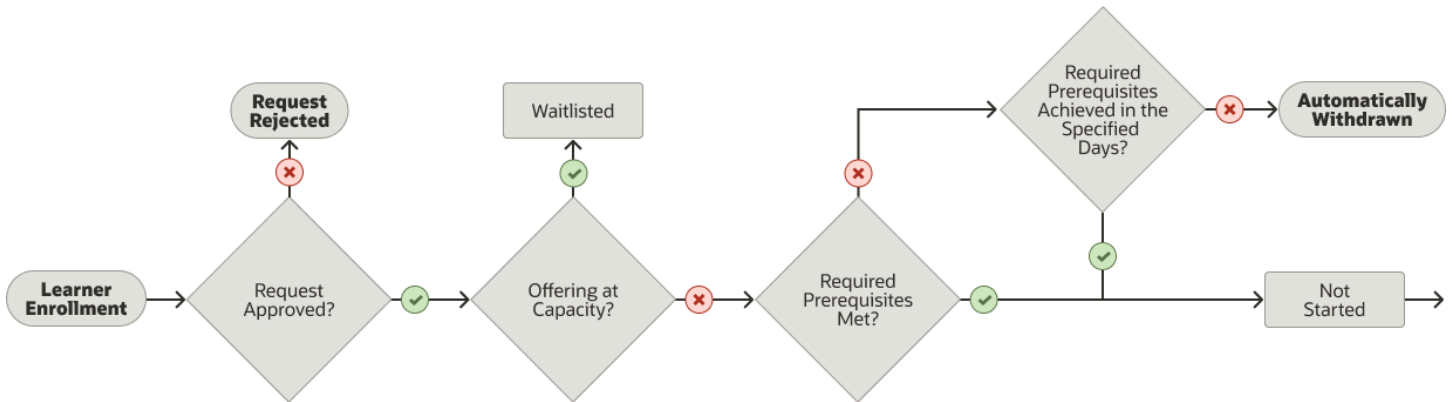
The assignment life cycle changes when the learning includes capacity enrollment options, as shown here. When the learner enrolls or is enrolled in a course offering where enrollment isn't yet at capacity, the assignment status is Not Started. If enrollment is at capacity, the assignment status changes to Waitlisted where it remains until a seat is available. When a seat is available, the status changes to Not Started.



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



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



## Change Status Options for Oracle Learning Assignments

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

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

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

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

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

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

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

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

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



# 20 Manual Payment Transactions for Course Offering Assignments

## Internal Chargebacks for Oracle Learning That Incurs Costs

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

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

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

## Price Locked Transactions for Oracle Learning Assignments

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

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

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

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

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

## Price Adjustment Transactions for Oracle Learning Assignments

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

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

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

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

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

## Payment Transactions for Oracle Learning Assignments

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

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

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

## Refund Transactions for Oracle Learning Assignments

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

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



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

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



# 21 Learning Initiative Administration

## Oracle Learning Initiatives

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

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

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

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

### Related Topics

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

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

Automatically add learners to and withdraw them from a course, offering, or specialization. Use the Courses, Offerings, Specialization, and Learning Initiative tasks on the **My Client Groups > Learning** page.

1. On the Courses, Offering, or Specialization page, search for and select the learning item you want to add learners to. Then click the **Learners** button to open the learning item details page on the **Learners > Learning Initiatives** tab. Or use the Learning Initiatives task to open the Learning Initiatives page.
2. On the Add Learners menu, select the assignment type--**Voluntary** or **Required**, or select **Recommendations**.
3. On the dialog box, Enrollment Details page, complete the required and relevant optional fields.
  - The start date is when the learners see the learning item in their current learning. If you need to start the assignment on a past date, use HCM Data Loader.
  - Optionally complete any enabled learning request descriptive flexfields.

These fields are specific to assignments that you create with the Learning Initiatives task.

- Only learning administrators see the required name and optional description.
  - The Request Type section fields that you need to complete depend on whether the assignment is for a catalog learning item or noncatalog item. Noncatalog items are external learning that you want to record in a learner's history, such as a completed college course.
4. Click **Next**.

5. On the Select Learners page, Add menu, select the method to use for selecting learners, such as **Person**, **Analysis Report Criteria**, or **Learning Assignment Criteria**. Alternatively, you can use the Add a Person field.
6. On the dialog box, search for and select the criteria to find the appropriate learners for the assignment. What you see depends on your selection method.

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

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

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

7. For recommendations, skip to step 9. For required and voluntary assignments, click **Next**.
8. On the Advanced Rules page, review the default rules for the learning assignment and make changes, as appropriate. To keep learners assignments and recommendations current, we recommend that you withdraw incomplete assignments and recommendations for learners who no longer match the learner criteria.  
The validity rules, which include expiration and renewal options, apply to only required learning assignments.
9. Click **Submit**.

#### Related Topics

- [Initial Learning Record Status Options for Default Learning Enrollment in Oracle Learning](#)
- [Prerequisites Options for Default Learning Enrollment in Oracle Learning](#)
- [Validity Periods and Expiration and Renewal Options for Oracle Learning Courses and Required Learning Assignments](#)

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

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

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

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

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

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



# 22 Me > Learning

## Learning Enrollments

You maintain compliance with organization-required learning, for example, by completing regularly provided ethics and safety courses. You can also develop your talent profile by completing required, recommended, and voluntary learning, such as enhancing your Microsoft Word, Excel, and PowerPoint skills.

**Note:** Voluntary learning refers to your enrolled learning that doesn't have a due date.

You have various actions available to you on the enrollment details page of each learning item, including these:

- Add your own ratings and comments to it.
- Withdraw from it.
- Recommend it to others.
- Report it, such as for noncompliance with company policies.
- Print your completion certificate.

You also use the enrollment details page to launch and resume the learning activities for the learning item. You can also review any activities you already completed.

Use the **Me > Learning** work area to access your learning experiences, such as your enrollments, learning communities, and learning history. Your history includes completed enrollments and, depending on your learning configuration, can include withdrawn enrollments. Again depending on your configuration, this task opens either the My Learning Experiences or Learning page.

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

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

Talent profile content, such as skills, competencies, licenses, and certifications, can be valid for specific periods, then you need to renew them. Their expiration dates get updated when you complete related learning only after the current expiration dates.

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

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

## External Learning

You can get approval to take external learning and get credit for completed external learning using the **Me > Learning** page Actions menu.

For example, to qualify for tuition reimbursement, you need to request approval for your next-semester courses. Or your manager tells you to record the 1-day leadership seminar you recently attended. When you record external learning experiences, you can attach relevant documents, such as completion certifications and report cards.

## Withdraw from Learning Enrollments or Assignments

You and your manager can withdraw you from voluntary learning enrollments using the Actions menu on the learning item page. And your manager can withdraw you from any required learning that they assigned you.

You can withdraw, or get withdrawn from learning with these statuses: Not Started, Active, Content Complete, or In Progress. You can't withdraw, or get withdrawn from learning with any other status.

You and your manager can't withdraw you from required enrollments assigned by a learning administrator. And you can't withdraw from learning with the **No Offerings Selected** status. But your learning administrator can help you withdraw.

## Available Learning

You can explore all of the learning items offered by your company. You can also review learning items that others recommended to you.

For example, you want to find learning to enhance the skills and competencies on your talent. Or you want to find learning to fill skill and competency gaps in your current job role or careers of interest.

Learning items includes courses, specializations, videos, learning communities, and learning journeys. Learning items can be on-site or virtual instructor-led training (ILT or VLT), web-based training (WBT), or a combination of learning types. They can also include videos and PDFs as well as other materials.

For each learning item, you can view details that include any learning prerequisites, the learning activities you need to complete, and any learning outcomes.

You also have various actions available to you on each learning item page:

- Review the ratings and comments to help you decide whether to enroll.
- Report learning that might violate corporate policies or local regulations.
- Recommend the learning item to others.

To explore learning opportunities from the My Learning Experiences page, use the Explore tab at the bottom of the page. To see learning recommended to you by others, and accept or dismiss a recommendation, use the What to Learn tab. On the Learning page, use the What to Learn task to both explore learning opportunities and review recommended learning.



**Tip:** To enhance the skills and competencies on your talent profile or career development pages, search for relevant courses and specializations using specific outcome terms. To see the learning outcomes for any course or specialization, on the details page, Actions menu, click View Learning Item Details.

## Shared Learning

Depending on your company's policies, you might be able to author or publish videos and learning journeys for the learning catalog.

To view your authored or published items, or drafts of unpublished items, on the My Learning Experiences page, use the Actions menu. On the Learning page, use the My Shared Learning task.

## My Learning Communities

You can access the learning communities that you're a member of and track communities that you manage, using the **Me > Learning** page. Also create and manage self-service communities, including the catalog and related learning and materials.

You can leave a community at any time using the Actions menu on the community page.

### Related Topics

- [Oracle Learning Communities](#)
- [Oracle Learning Communities Types, Content, Contributions, and Assignments](#)
- [What Happens When You Change the Privacy Setting for an Oracle Learning Community](#)
- [The Difference Between Removing and Deleting Items from the Oracle Learning Community Catalog](#)
- [Oracle Learning Community Membership and Managers](#)

## My Learning on a Mobile Device

Continue your active learning enrollments on your mobile device regardless of whether you're online or offline. Also track your required, voluntary, and recommended learning items. Install and use the Oracle HCM app.

Oracle HCM automatically downloads your active learning items when you're online. Then you can continue your learning even when you're offline. The next time you're online, the mobile app syncs your progress to the server. To download content only through WiFi and set the maximum download size, use the **Settings** menu.

Here's what you can from the My Learning page on your mobile device.

- **Required tab:** You can view your learning summary as well as the number of overdue and completed learning items. The required learning item cards with an **Overdue** status appear first, then the cards with a **Completed** status.

- **Voluntary tab:** View the cards for your voluntary learning items. For example, you can see the total or remaining duration of each item.
- **Recommended tab:** View the learning items that others recommended to you. For example, you can see the person who recommended the learning and the total or remaining duration of each item.

The **Play**, **Play Again**, or **Resume** buttons on the Required, Voluntary, and Recommend tabs appear according to your progress on active learning items. You can't complete any waitlisted, requested, or inactive learning items while offline.

**Tip:** Sync frequently as you work through learning items so that the server has your most recent progress. You don't want Oracle HCM to be the sole source of that information.

#### *Related Topics*

- [Configure the Oracle HCM Cloud Mobile App](#)
- [Oracle HCM Cloud Mobile App](#)

## 23 My Team > Learning

### Assign Learning to Your Team

To help your team remain compliant and stay current with important skills, tools, and competencies, you can assign relevant learning items, including communities and course offerings.

You can set a learning item as required for someone and recommend it to them. And you can set a learning item as required for certain people and recommend it to others.

To recommend a specific course offering, open the course details. Then in the Available Offerings section, click **View Details**. The offering details page Actions menu includes the **Assign Learning to My Team** option.

You can also request and record external learning for your team. And depending on your company's policies, you can encourage them to publish learning videos and author learning journeys. Use the **My Team > Learning** page, Actions menu.

### Track Completion of Team Learning

You can track completion of required and voluntary learning enrollments for your team using a variety of filter options. For example, filter by enrollment status, enrollment type, and due date. Use the **My Team > Learning** page.

View the details of this learning item, for example, to see the learning outcomes related learning, and available offerings.

