



User Guide: OLM for Managers and Supervisors

Purpose

Through Oracle Learning Management (OLM), Managers and Supervisors have immediate and direct access to the learning records for their direct reports and indirect reports within their reporting hierarchy. It also provides greater capability to create workforce development plans based on department, unit, or position type; and is a tool for incorporating individual employee development into the annual performance planning process.

This guide provides step-by-step instructions for Managers and Supervisors to access Direct Report Training Records. Below is a list of actions which may be taken by a Supervisor. Clicking on the title below will take you directly to the instructions for that function.

- [Access Direct Report Learner Home](#)
- [Enroll a Direct Report in a Class](#)
- [Cancel a Direct Report's Enrollment in a Class](#)
- [Print a Transcript for a Direct Report](#)

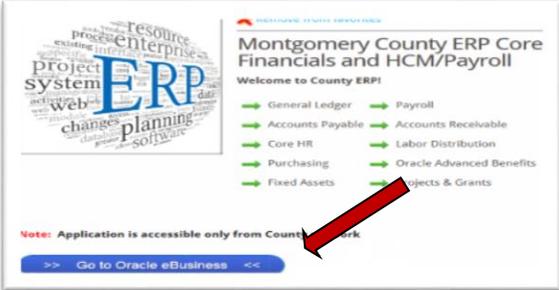
Additional Information

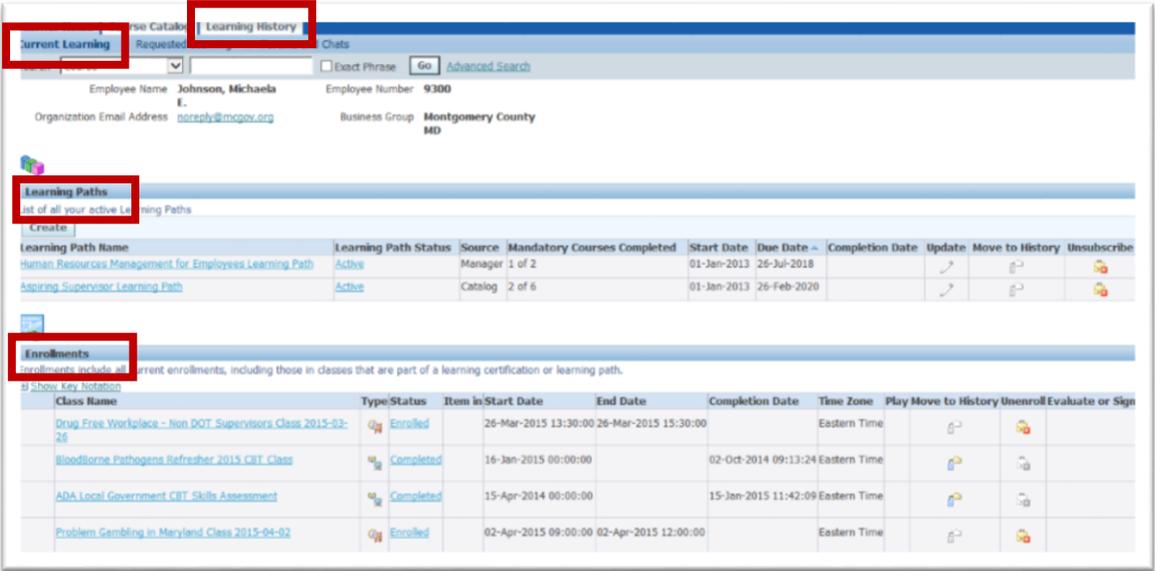
When we use "**employees**" or "**direct reports**" we are referring to staff members who are **employed by** Montgomery County Government. Oracle cannot provide supervisors with access to training records for Contractors, Volunteers or Interns. However, you may request information from the OHR Training and Organizational Development Division (see below).

Questions

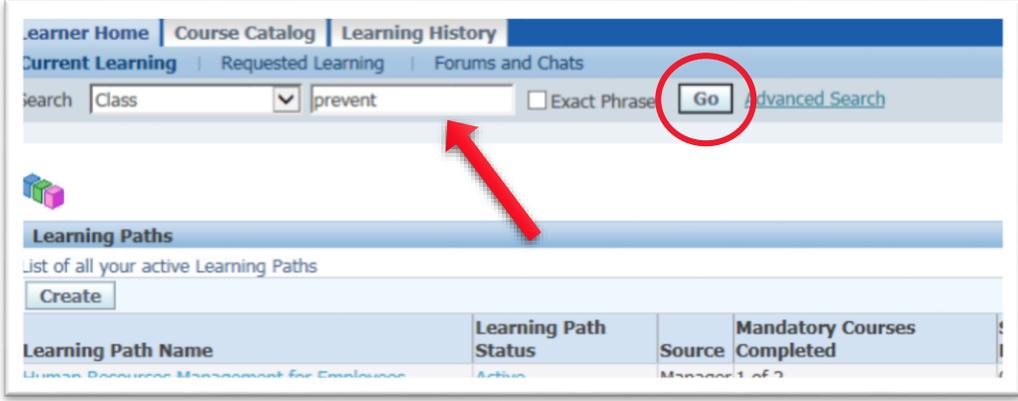
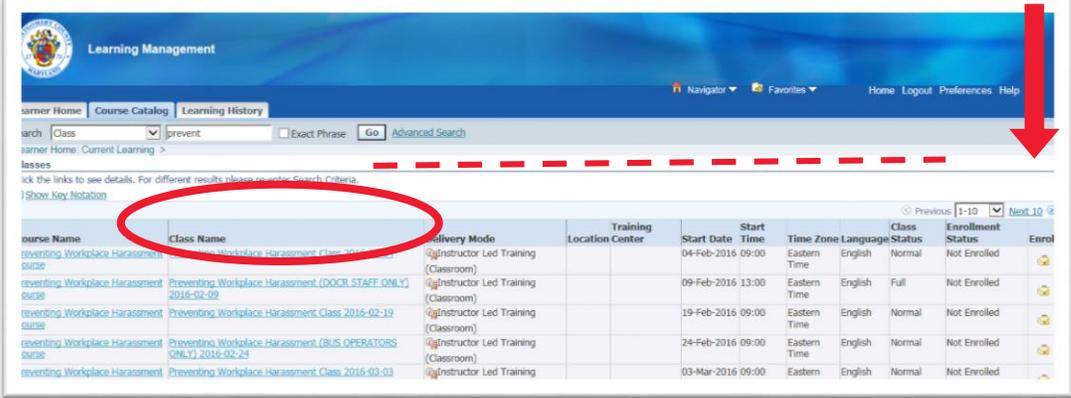
If you have questions using this guide, please contact the OLM Administrator at OLM.Admin@MontgomeryCountyMD.gov or 240-777-5116.

Access Direct Report Learner Home

Step	Action	
1.	<p>Go to the AccessMCG ePortal: https://eportal.montgomerycountymd.gov.</p> <p>Enter your MCG Network user name and password.</p> <ul style="list-style-type: none"> Click Log in. 	
2.	<p>The ePortal menu will open.</p> <p>Click Go to Oracle eBusiness,</p> <ul style="list-style-type: none"> The eBusiness Suite Page will open. 	
3.	<p>Click on MCG HR Manager Access.</p>	
4.	<p>Learner Management for Managers will open.</p> <p>Click Learner Home.</p>	

Step	Action																																																																																	
5.	<p>The employee's Leaner Home will open.</p> <p>Here you can view:</p> <ul style="list-style-type: none"> • Training records back to April 2013 by clicking the Learning History Tab. • Learning Paths the employee is subscribed to. • Recent training and enrollment status of each class. 	 <p>The screenshot shows the 'Learning History' page for Michael Johnson (Employee Number 9300). It features three main sections: 'Current Learning', 'Learning Paths', and 'Enrollments'. The 'Learning Paths' section lists two active paths: 'Human Resources Management for Employees Learning Path' and 'Aspiring Supervisor Learning Path'. The 'Enrollments' section lists four classes with their status (Enrolled or Completed), start/end dates, and completion dates.</p> <table border="1"> <thead> <tr> <th>Learning Path Name</th> <th>Learning Path Status</th> <th>Source</th> <th>Mandatory Courses Completed</th> <th>Start Date</th> <th>Due Date</th> <th>Completion Date</th> <th>Update</th> <th>Move to History</th> <th>Unsubscribe</th> </tr> </thead> <tbody> <tr> <td>Human Resources Management for Employees Learning Path</td> <td>Active</td> <td>Manager</td> <td>1 of 2</td> <td>01-Jan-2013</td> <td>26-Jul-2018</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Aspiring Supervisor Learning Path</td> <td>Active</td> <td>Catalog</td> <td>2 of 6</td> <td>01-Jan-2013</td> <td>26-Feb-2020</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Class Name</th> <th>Type/Status</th> <th>Item In/Start Date</th> <th>End Date</th> <th>Completion Date</th> <th>Time Zone</th> <th>Play</th> <th>Move to History</th> <th>Unenroll</th> <th>Evaluate or Sign</th> </tr> </thead> <tbody> <tr> <td>Drug Free Workplace - Non DOT Supervisors Class 2015-02-26</td> <td>Enrolled</td> <td>26-Mar-2015 13:30:00</td> <td>26-Mar-2015 15:30:00</td> <td></td> <td>Eastern Time</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Biohazard Pathogens Refresher 2015 CBT Class</td> <td>Completed</td> <td>16-Jan-2015 00:00:00</td> <td></td> <td>02-Oct-2014 09:13:24</td> <td>Eastern Time</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>ADA Local Government CBT Skills Assessment</td> <td>Completed</td> <td>15-Apr-2014 00:00:00</td> <td></td> <td>15-Jan-2015 11:42:09</td> <td>Eastern Time</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Problem Gambling in Maryland Class 2015-04-02</td> <td>Enrolled</td> <td>02-Apr-2015 09:00:00</td> <td>02-Apr-2015 12:00:00</td> <td></td> <td>Eastern Time</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Learning Path Name	Learning Path Status	Source	Mandatory Courses Completed	Start Date	Due Date	Completion Date	Update	Move to History	Unsubscribe	Human Resources Management for Employees Learning Path	Active	Manager	1 of 2	01-Jan-2013	26-Jul-2018					Aspiring Supervisor Learning Path	Active	Catalog	2 of 6	01-Jan-2013	26-Feb-2020					Class Name	Type/Status	Item In/Start Date	End Date	Completion Date	Time Zone	Play	Move to History	Unenroll	Evaluate or Sign	Drug Free Workplace - Non DOT Supervisors Class 2015-02-26	Enrolled	26-Mar-2015 13:30:00	26-Mar-2015 15:30:00		Eastern Time					Biohazard Pathogens Refresher 2015 CBT Class	Completed	16-Jan-2015 00:00:00		02-Oct-2014 09:13:24	Eastern Time					ADA Local Government CBT Skills Assessment	Completed	15-Apr-2014 00:00:00		15-Jan-2015 11:42:09	Eastern Time					Problem Gambling in Maryland Class 2015-04-02	Enrolled	02-Apr-2015 09:00:00	02-Apr-2015 12:00:00		Eastern Time				
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Enroll a Direct Report in a Class

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1.	Access the Direct Report's Learner Home as described above – See Access Direct Report Learner Home .																																																																			
2.	<p>Once on the Learner Home Page:</p> <p>Enter in the Search box, <i>only one word</i> from the class title.</p> <ul style="list-style-type: none"> In this example, we are searching for <i>Preventing Workplace Harassment</i>, so we typed the word, “prevent” in the Search box. Click Go. 																																																																			
3.	<p>A list of classes will open.</p> <p>Locate the class you want.</p> <ul style="list-style-type: none"> Click on the Enroll button at the far right. 	 <table border="1" data-bbox="909 1101 1980 1279"> <thead> <tr> <th>Course Name</th> <th>Class Name</th> <th>Delivery Mode</th> <th>Training Location Center</th> <th>Start Date</th> <th>Start Time</th> <th>Time Zone</th> <th>Language</th> <th>Class Status</th> <th>Enrollment Status</th> <th>Enroll</th> </tr> </thead> <tbody> <tr> <td>Preventing Workplace Harassment</td> <td>Preventing Workplace Harassment (Classroom)</td> <td>Instructor Led Training (Classroom)</td> <td></td> <td>04-Feb-2016</td> <td>09:00</td> <td>Eastern Time</td> <td>English</td> <td>Normal</td> <td>Not Enrolled</td> <td></td> </tr> <tr> <td>Preventing Workplace Harassment</td> <td>Preventing Workplace Harassment (DOOR STAFF ONLY) 2016-02-09</td> <td>Instructor Led Training (Classroom)</td> <td></td> <td>09-Feb-2016</td> <td>13:00</td> <td>Eastern Time</td> <td>English</td> <td>Full</td> <td>Not Enrolled</td> <td></td> </tr> <tr> <td>Preventing Workplace Harassment</td> <td>Preventing Workplace Harassment Class 2016-02-19</td> <td>Instructor Led Training (Classroom)</td> <td></td> <td>19-Feb-2016</td> <td>09:00</td> <td>Eastern Time</td> <td>English</td> <td>Normal</td> <td>Not Enrolled</td> <td></td> </tr> <tr> <td>Preventing Workplace Harassment</td> <td>Preventing Workplace Harassment (BUS OPERATORS ONLY) 2016-02-24</td> <td>Instructor Led Training (Classroom)</td> <td></td> <td>24-Feb-2016</td> <td>09:00</td> <td>Eastern Time</td> <td>English</td> <td>Normal</td> <td>Not Enrolled</td> <td></td> </tr> <tr> <td>Preventing Workplace Harassment</td> <td>Preventing Workplace Harassment Class 2016-03-03</td> <td>Instructor Led Training</td> <td></td> <td>03-Mar-2016</td> <td>09:00</td> <td>Eastern Time</td> <td>English</td> <td>Normal</td> <td>Not Enrolled</td> <td></td> </tr> </tbody> </table>	Course Name	Class Name	Delivery Mode	Training Location Center	Start Date	Start Time	Time Zone	Language	Class Status	Enrollment Status	Enroll	Preventing Workplace Harassment	Preventing Workplace Harassment (Classroom)	Instructor Led Training (Classroom)		04-Feb-2016	09:00	Eastern Time	English	Normal	Not Enrolled		Preventing Workplace Harassment	Preventing Workplace Harassment (DOOR STAFF ONLY) 2016-02-09	Instructor Led Training (Classroom)		09-Feb-2016	13:00	Eastern Time	English	Full	Not Enrolled		Preventing Workplace Harassment	Preventing Workplace Harassment Class 2016-02-19	Instructor Led Training (Classroom)		19-Feb-2016	09:00	Eastern Time	English	Normal	Not Enrolled		Preventing Workplace Harassment	Preventing Workplace Harassment (BUS OPERATORS ONLY) 2016-02-24	Instructor Led Training (Classroom)		24-Feb-2016	09:00	Eastern Time	English	Normal	Not Enrolled		Preventing Workplace Harassment	Preventing Workplace Harassment Class 2016-03-03	Instructor Led Training		03-Mar-2016	09:00	Eastern Time	English	Normal	Not Enrolled	
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4. The **Class Summary** page will open.

Review the **Enrollment** details.

- Click **Review**.

Another **Enrollment Details** window will open.

- Click **Submit**.

Class Summary

Delivery Mode: Instructor Led Training (Classroom)

Course Name: Preventing Workplace Harassment Course

Class Name: Preventing Workplace Harassment Class 2016-06-01

Start Date: 01-Jun-2016 09:00

End Date: 01-Jun-2016 12:00

Time Zone: Eastern Time

Training Center

Location

Language: English

Price

Submit to approve the action or Back to continue working on this action.

Proposed

Course Name: Preventing Workplace Harassment Course

Class Name: Preventing Workplace Harassment Class 2016-06-01

Start Date: 01-JUN-2016 09:00

End Date: 01-JUN-2016 12:00

Time Zone: Eastern Time

Delivery Mode: Instructor Led Training (Classroom)

Language: English

Cost Center

Special Instructions

Enrollment Justification

5. You will automatically be returned to the Direct Report's **Learner Home** page.

You can see the enrollment under the **Enrollments** section.

Both you and the Employee will receive a **confirmation** by the next day that you have enrolled the employee in the class.

Learning Management

Home Catalog Learning History

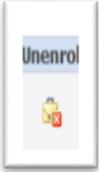
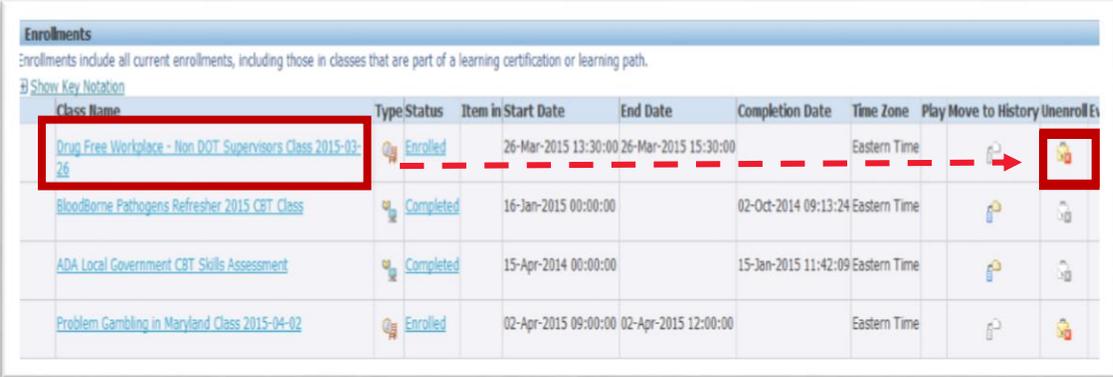
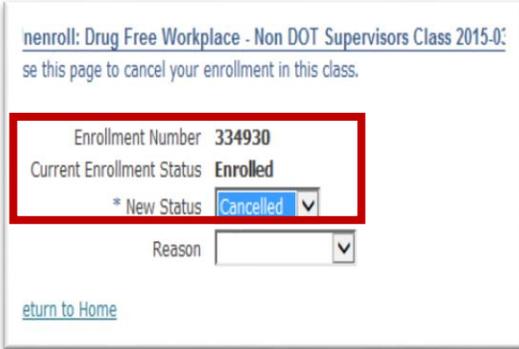
Learning Paths

Learning Path Name	Learning Path Status	Mandatory Courses	Source Completed	Start Date	Due Date	Completion Date	Move to Update History	Unsubscribe
No results found.								

Enrollments

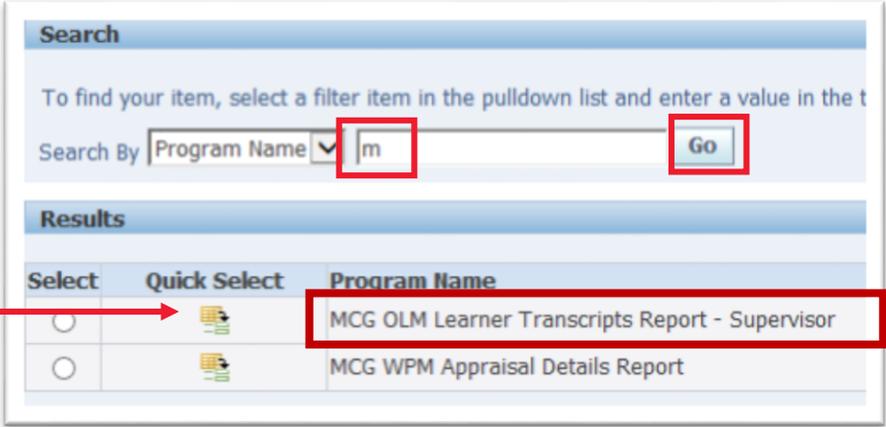
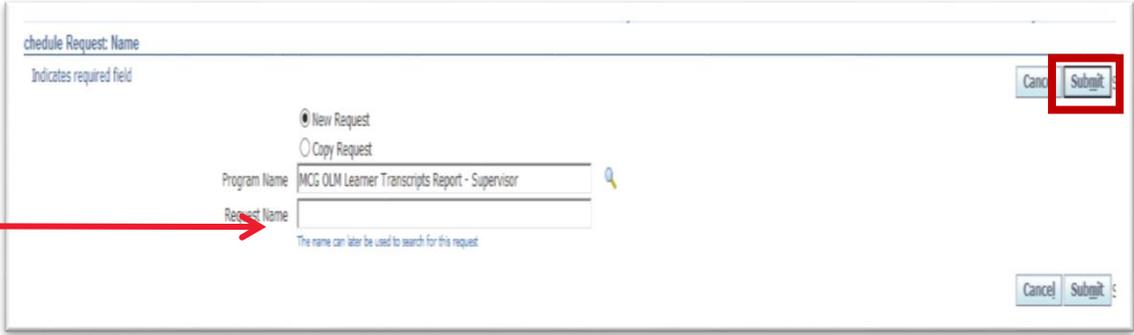
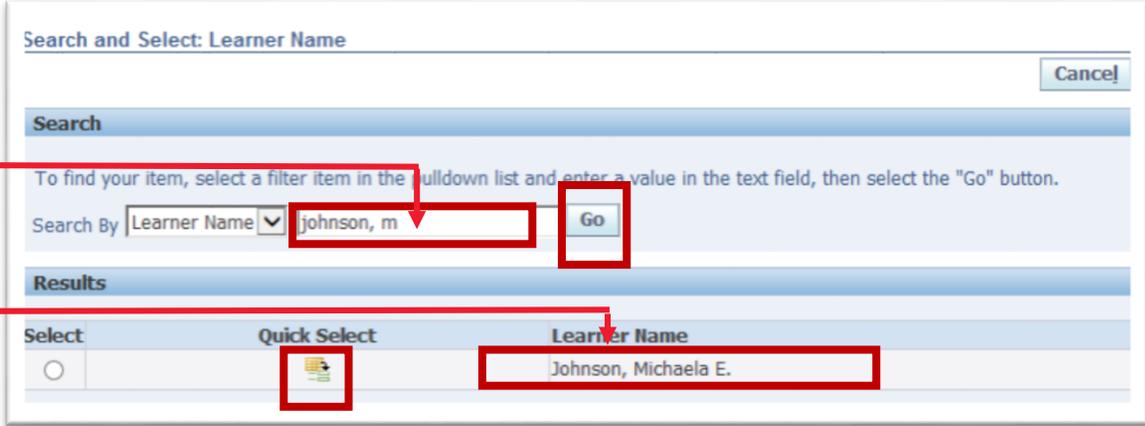
Class Name	Type	Status	Item in	Start Date	End Date	Completion Date	Time Zone	Move to Play History	Unenroll	Evaluate or Sign
Preventing Workplace Harassment Class 2013-04-18	Instructor Led Training (Classroom)	Enrolled		18-Apr-2013 08:30:00	18-Apr-2013 11:30:00		Eastern Time			

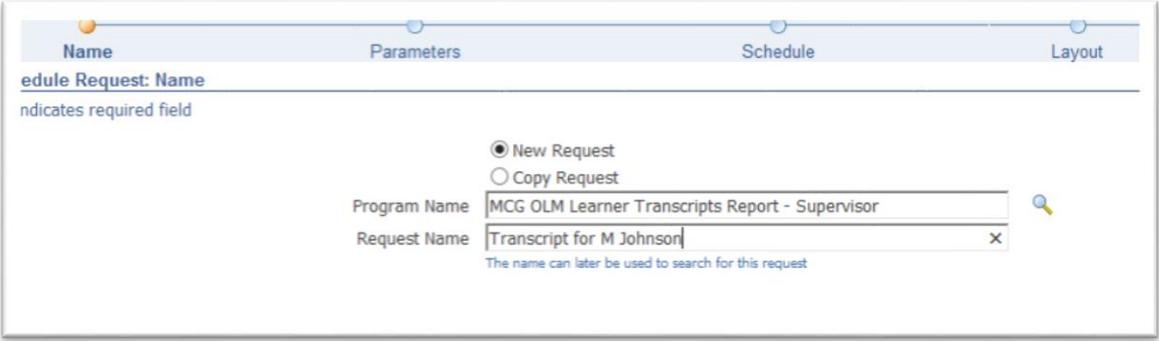
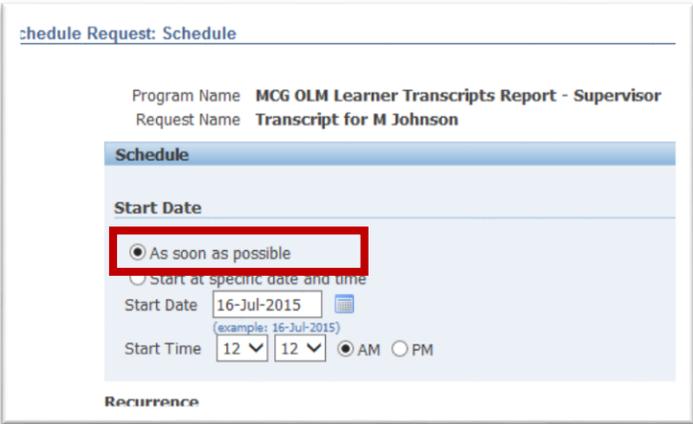
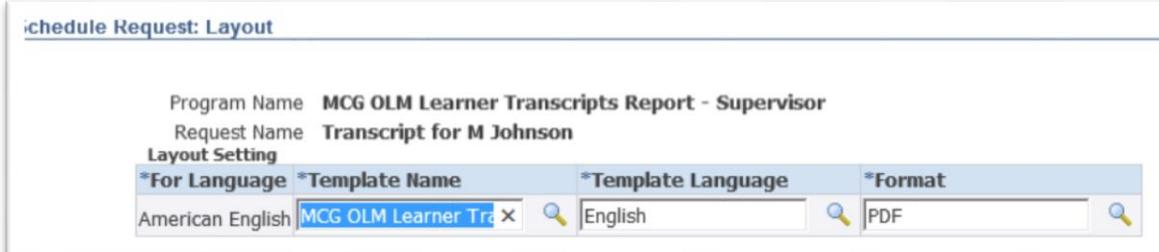
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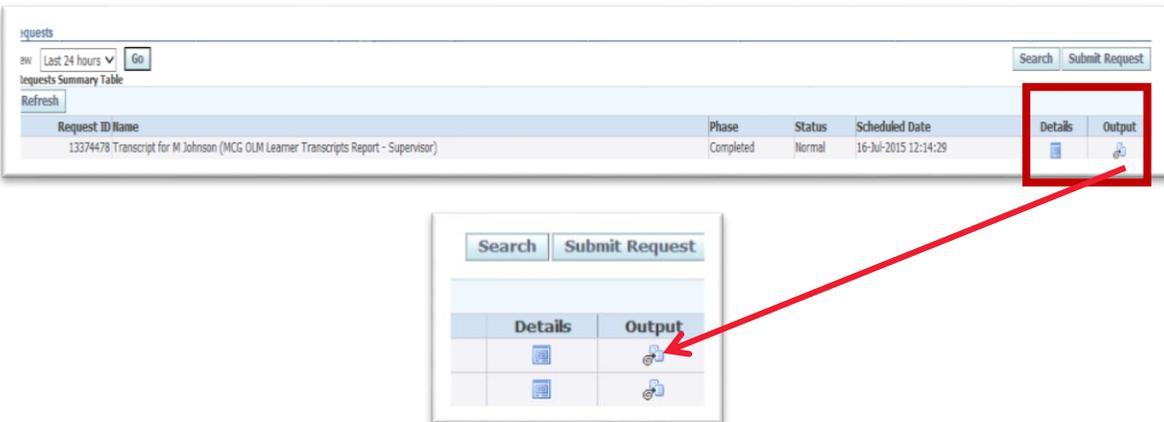
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2.	<p>Once on the Learner Home Page:</p> <p>Go the Enrollments section, and locate the class</p> <ul style="list-style-type: none"> Click Unenroll  <p>A new screen will open.</p> <p>Click the New Status drop down arrow.</p> <ul style="list-style-type: none"> Select Cancelled. Click Finish. <p>A confirming email will be sent to the employee and to you.</p>	 <table border="1"> <thead> <tr> <th>Class Name</th> <th>Type</th> <th>Status</th> <th>Item in</th> <th>Start Date</th> <th>End Date</th> <th>Completion Date</th> <th>Time Zone</th> <th>Play</th> <th>Move to History</th> <th>Unenroll</th> </tr> </thead> <tbody> <tr> <td>Drug Free Workplace - Non DOT Supervisors Class 2015-03-26</td> <td></td> <td>Enrolled</td> <td></td> <td>26-Mar-2015 13:30:00</td> <td>26-Mar-2015 15:30:00</td> <td></td> <td>Eastern Time</td> <td></td> <td></td> <td></td> </tr> <tr> <td>BloodBorne Pathogens Refresher 2015 CBT Class</td> <td></td> <td>Completed</td> <td></td> <td>16-Jan-2015 00:00:00</td> <td></td> <td>02-Oct-2014 09:13:24</td> <td>Eastern Time</td> <td></td> <td></td> <td></td> </tr> <tr> <td>ADA Local Government CBT Skills Assessment</td> <td></td> <td>Completed</td> <td></td> <td>15-Apr-2014 00:00:00</td> <td></td> <td>15-Jan-2015 11:42:09</td> <td>Eastern Time</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Problem Gambling in Maryland Class 2015-04-02</td> <td></td> <td>Enrolled</td> <td></td> <td>02-Apr-2015 09:00:00</td> <td>02-Apr-2015 12:00:00</td> <td></td> <td>Eastern Time</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>  <p>Unenroll: Drug Free Workplace - Non DOT Supervisors Class 2015-03-26</p> <p>Use this page to cancel your enrollment in this class.</p> <p>Enrollment Number: 334930 Current Enrollment Status: Enrolled * New Status: Cancelled Reason: <input type="text"/></p> <p>Return to Home</p> <p>Back Finish</p>  <p>Back Finish</p>	Class Name	Type	Status	Item in	Start Date	End Date	Completion Date	Time Zone	Play	Move to History	Unenroll	Drug Free Workplace - Non DOT Supervisors Class 2015-03-26		Enrolled		26-Mar-2015 13:30:00	26-Mar-2015 15:30:00		Eastern Time				BloodBorne Pathogens Refresher 2015 CBT Class		Completed		16-Jan-2015 00:00:00		02-Oct-2014 09:13:24	Eastern Time				ADA Local Government CBT Skills Assessment		Completed		15-Apr-2014 00:00:00		15-Jan-2015 11:42:09	Eastern Time				Problem Gambling in Maryland Class 2015-04-02		Enrolled		02-Apr-2015 09:00:00	02-Apr-2015 12:00:00		Eastern Time			
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Print a Transcript for a Direct Report

Step	Action	
1.	Login to the AccessMCG ePortal : https://eportal.montgomerycountymd.gov . Locate the MCG HR Manager Access link in the eBusiness Suite, as described in steps 1 – 3 above – See Access Direct Report Learner Home .	
2.	Click on MCG HR Manager Access .	
3.	Click Submit Reports .	

Step	Action	
4.	<p>The Search and Select Program screen will open.</p> <p>Enter “m” in the Program Name search box.</p> <ul style="list-style-type: none"> Click Go. <p>Find MCG OLM Learner Transcripts Report – Supervisor.</p> <ul style="list-style-type: none"> Double-click Quick Select. Click Submit. 	
5.	<p>The Request Name box will open.</p> <p>Create a Title for your Report.</p> <p>Enter the Title in the “Request Name” field – such as “<i>Transcript for Employee Name Apr2016</i>”</p> <ul style="list-style-type: none"> Click Submit. 	
6.	<p>Search and Select Learner Name window will open.</p> <p>Enter the Learner’s (employee’s) Name - last name first.</p> <ul style="list-style-type: none"> Click Go. <p>A list of Direct Reports will appear.</p> <ul style="list-style-type: none"> Find the correct individual Double-click Quick Select. 	

Step	Action	
7.	<p>You will be returned to the Parameters screen.</p> <p>Double-click Quick Select</p>	
8.	<p>Schedule Request window will open.</p> <p>The window defaults to “as soon as possible”</p> <ul style="list-style-type: none"> Click Submit. <p>Schedule Layout Screen will appear.</p> <ul style="list-style-type: none"> Click Submit. <p>A Confirmation Message will appear, confirming your submittal.</p> <ul style="list-style-type: none"> Click Submit. 	  

Step	Action																																																																	
9. .	<p>The report is now ready to be viewed and or printed.</p> <p>A list of your reports will appear.</p> <ul style="list-style-type: none"> • Locate the report you want to run. • Click the Output Icon to the right of the Title. 																																																																	
10. .	<p>The Transcript will open. This report will show all classes since April, 2013.</p> <p>To print the document</p> <ul style="list-style-type: none"> • Go to the top of the screen. • Click File. • Follow the prompts. <p>For class records prior to April, 2013, please go to the OHR Training Webpage and click on Transcripts.</p> <p>However, If the employee took training as an outside contractor, intern, etc., it will be included in there external training record. Please contact OLM.Administrator@montgomerycountymd.gov to request a report.</p>	 <table border="1" data-bbox="898 860 1184 902"> <tr> <td>Learner Name</td> <td>Johnson, Michaela E.</td> </tr> <tr> <td>Department</td> <td>OHR 33 Organizational Development</td> </tr> </table> <table border="1" data-bbox="898 938 1953 1101"> <thead> <tr> <th>Course Name</th> <th>Category</th> <th>Delivery Type</th> <th>Start Date</th> <th>End Date</th> <th>Enrollment Status</th> <th>Assessment</th> <th>Credit Type</th> <th>Other Credit Type</th> <th>Credits</th> </tr> </thead> <tbody> <tr> <td>Content Management System CBT Class</td> <td>CBT Training</td> <td>Self-Paced Online</td> <td>01-JAN-2013</td> <td>18-JUN-2013</td> <td>Attended</td> <td>Successful</td> <td></td> <td></td> <td></td> </tr> <tr> <td>HIPAA for Internal Associates CBT Class</td> <td>CBT Training</td> <td>Self-Paced Online</td> <td>01-JAN-2013</td> <td></td> <td>Attended</td> <td>Successful</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Accountability and Ethics CBT Skills Assessment</td> <td>Skills Assessments</td> <td>Self-Paced Online</td> <td>01-JAN-2013</td> <td></td> <td>Enrolled</td> <td>Requirements not Met</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Accountability and Ethics CBT Skills Assessment</td> <td>Skills Assessments</td> <td>Self-Paced Online</td> <td>01-JAN-2013</td> <td></td> <td>Withdrawal</td> <td>Requirements not Met</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Content Management System CBT Skills</td> <td>Skills Assessments</td> <td>Self-Paced Online</td> <td>01-JAN-2013</td> <td></td> <td>Cancelled</td> <td>Requirements not Met</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Learner Name	Johnson, Michaela E.	Department	OHR 33 Organizational Development	Course Name	Category	Delivery Type	Start Date	End Date	Enrollment Status	Assessment	Credit Type	Other Credit Type	Credits	Content Management System CBT Class	CBT Training	Self-Paced Online	01-JAN-2013	18-JUN-2013	Attended	Successful				HIPAA for Internal Associates CBT Class	CBT Training	Self-Paced Online	01-JAN-2013		Attended	Successful				Accountability and Ethics CBT Skills Assessment	Skills Assessments	Self-Paced Online	01-JAN-2013		Enrolled	Requirements not Met				Accountability and Ethics CBT Skills Assessment	Skills Assessments	Self-Paced Online	01-JAN-2013		Withdrawal	Requirements not Met				Content Management System CBT Skills	Skills Assessments	Self-Paced Online	01-JAN-2013		Cancelled	Requirements not Met			
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Revised 3/11/2016