# User's Guide:
# Oracle Learning Management (OLM) for Managers and Supervisors

**Office of Human Resources Training and Organizational Development Team**
September, 2015

Through Oracle Learning Management (OLM) Managers and Supervisors have ***immediate and direct access to the Learning Records from running reports to accessing Learner Home pages*** of all of their direct reports and indirect reports. It also provides greater capability to create workforce development plans based on department, unit, or position type; it is also a tool for incorporating individual employee development into the annual performance planning process.

## PURPOSE

**Provide step-by-step instructions for Managers and Supervisors to access Direct Report Training Records.**


- Access your direct reports' Learner Home
- Enroll a direct report in a class
- Withdraw a direct report from a class
- Printing a Transcript for a Direct Report
- Subscribe a Direct Report to a Learning Path
- Enroll a Direct Report in a class within a Learning Path
- Check progress toward completion of a Learning Path

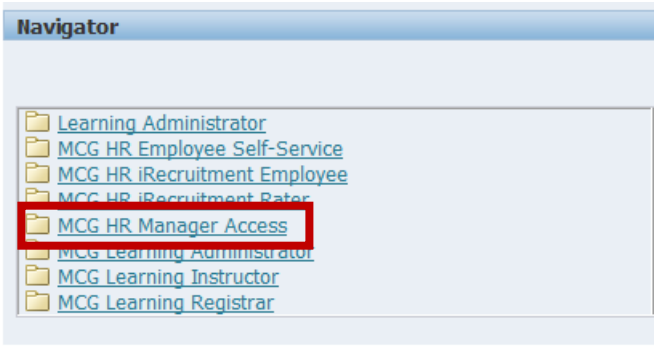

Clicking on the Title will take you directly to the Instructions for that function.

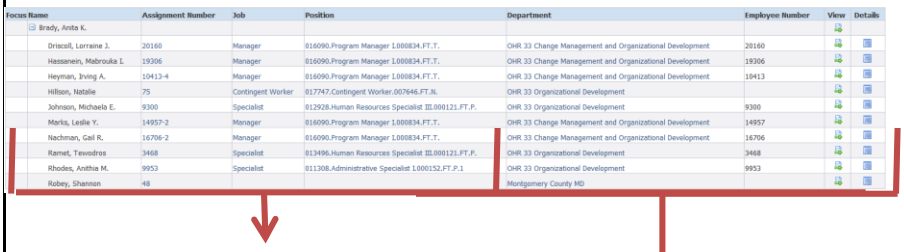
## FURTHER ASSISTANCE

**If you cannot locate an answer to your question in this guide, please contact the OHR Training and Development Team:**

- Training Team Email Address: OLM.Administrator@montgomerycountymd.gov
- Anithia Rhodes, 240-777-5116, Anitiia.Rhodes@montgomerycountymd.gov
- Michaela Johnson, 240-777-5063, Michaela.Johnson@montgomerycountymd.gov
- Teddy Ramet, 240-777-5153, Teddy.Ramet@montgomerycountymd.gov
- Anita Brady, Manager, 240-777-5066, Anita.Brady@montgomerycountymd.gov

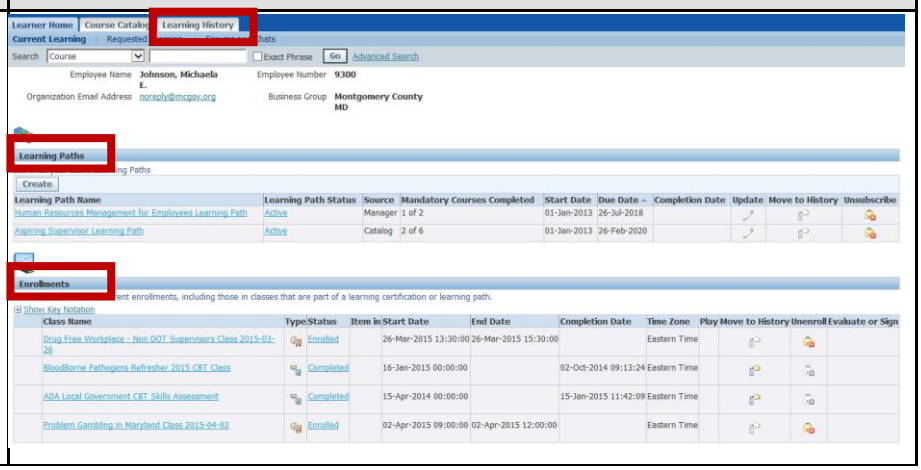
# ACCESS DIRECT REPORT'S LEARNING HOME

| Step | Action | |
|---|---|---|
| **1.** | Log into the **e-portal**<br>Enter in your username and password.<br><br>Click **Login Button**<br><br>The e-Business page will open. | |
| 2. | Click **Oracle eBusiness.**<br><br>Click **Go to Oracle eBusiness**,<br><br>Your eBusiness Suite page will open. | |
| 3. | Click on **MCG HR Manager Access** |  |

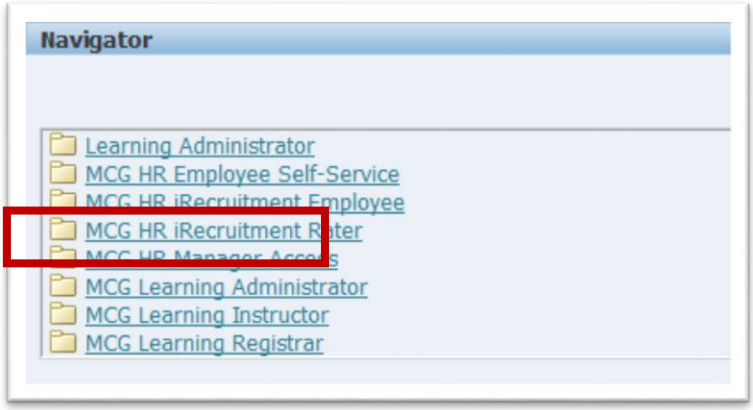
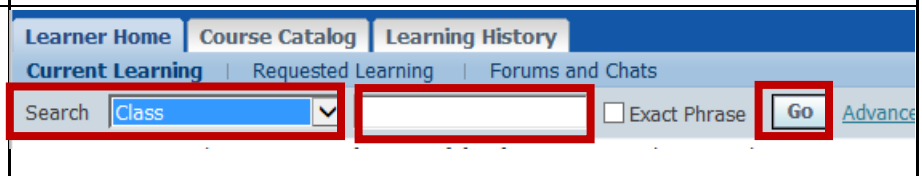
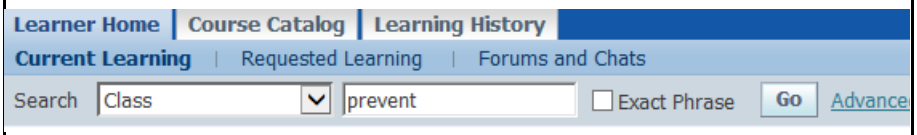
| Step | Action | |
|---|---|---|
| 4. | **Learner Management for Managers** will open.<br><br>Click **Learner Home** | |
| 5. | A screen will open with a **list of all your direct reports**.<br><br>We have divided and enlarged the screen shot here so you can see the detail.<br><br>To view an employee's Learner Home, click **View**. | **Full Screen View**<br>  <br>**Split Screen View #1 of 2**<br> <br>**Split Screen View #2 of 2**<br> |

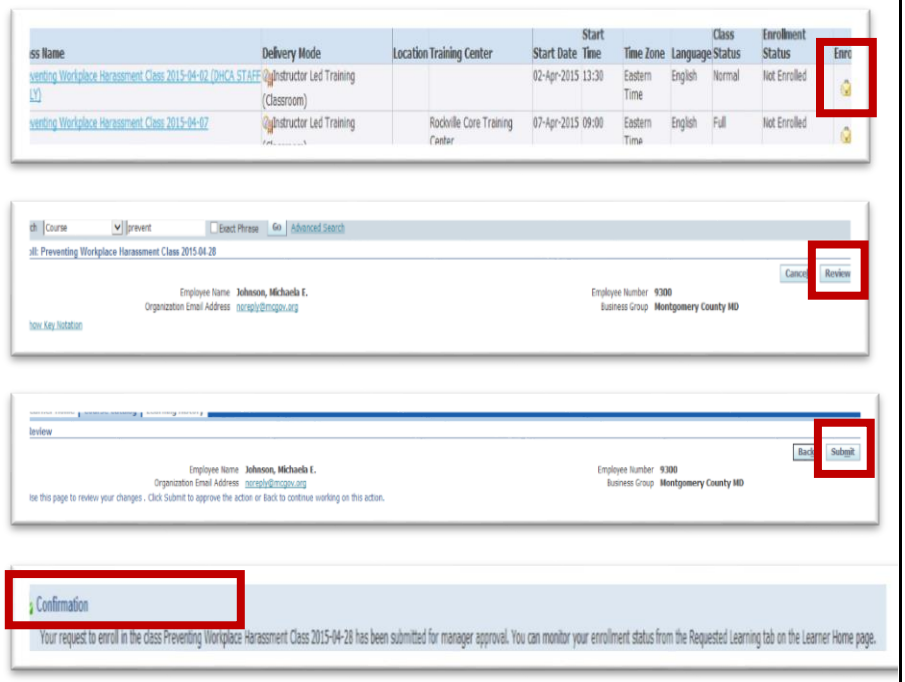
| Focus | Name | Assignment Number | Job | Position |
|---|---|---|---|---|
| | Brady, Anita K. | | | |
| | Driscoll, Lorraine J. | 20160 | Manager | 016090.Program Manager I.000834.FT.T. |
| | Hassanein, Mabrouka I. | 19306 | Manager | 016090.Program Manager I.000834.FT.T. |
| | Heyman, Irving A. | 10413-4 | Manager | 016090.Program Manager I.000834.FT.T. |
| | Hillson, Natalie | 75 | Contingent Worker | 017747.Contingent Worker.007646.FT.N. |
| | Johnson, Michaela E. | 9300 | Specialist | 012928.Human Resources Specialist III.000121.FT.P. |
| | Marks, Leslie Y. | 14957-2 | Manager | 016090.Program Manager I.000834.FT.T. |
| | Nachman, Gail R. | 16706-2 | Manager | 016090.Program Manager I.000834.FT.T. |
| | Ramet, Tewodros | 3468 | Specialist | 013496.Human Resources Specialist III.000121.FT.P. |
| | Rhodes, Anithia M. | 9953 | Specialist | 011308.Administrative Specialist I.000152.FT.P.1 |
| | Robey, Shannon | 48 | | |

| Department | Employee Number | View | Details |
|---|---|---|---|
| | | | |
| OHR 33 Change Management and Organizational Development | 20160 | | |
| OHR 33 Change Management and Organizational Development | 19306 | | |
| OHR 33 Change Management and Organizational Development | 10413 | | |
| OHR 33 Organizational Development | | | |
| OHR 33 Organizational Development | 9300 | | |
| OHR 33 Change Management and Organizational Development | 14957 | | |
| OHR 33 Change Management and Organizational Development | 16706 | | |
| OHR 33 Organizational Development | 3468 | | |
| OHR 33 Organizational Development | 9953 | | |
| Montgomery County MD | | | |

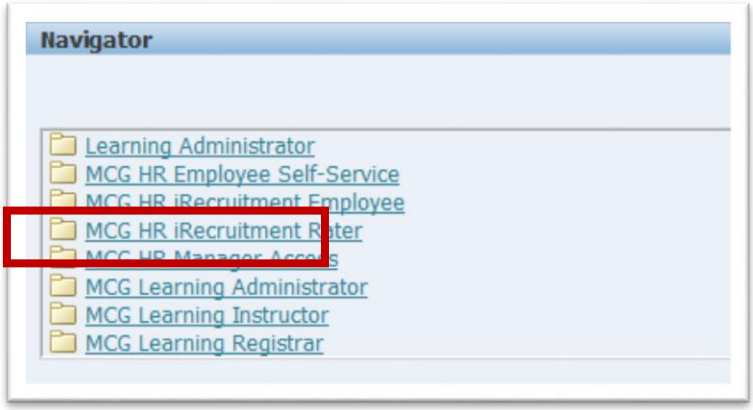
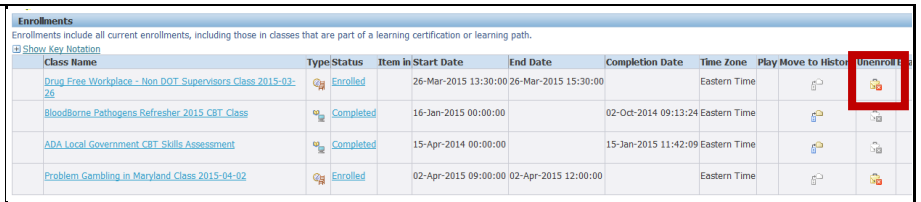
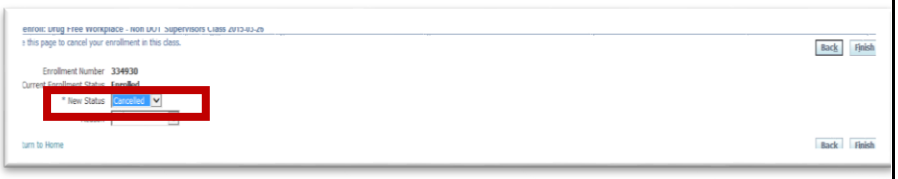
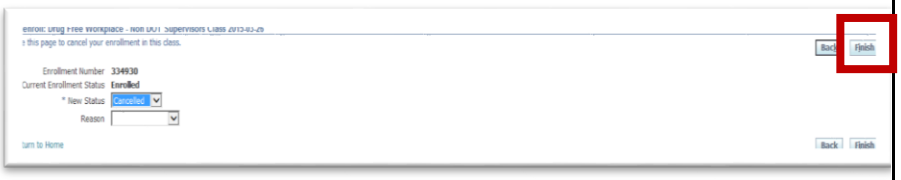
| Step | Action | |
|---|---|---|
| 6. | The employee's **Leaner Home** opens and you can view:<br><br>• Learning Paths the employee has subscribed to.<br>• Most recent training and enrollment status of each class.<br><br>Click **the Learning History** Tab to see training going back to early 2013. |  |

# ENROLL A DIRECT REPORT IN A CLASS

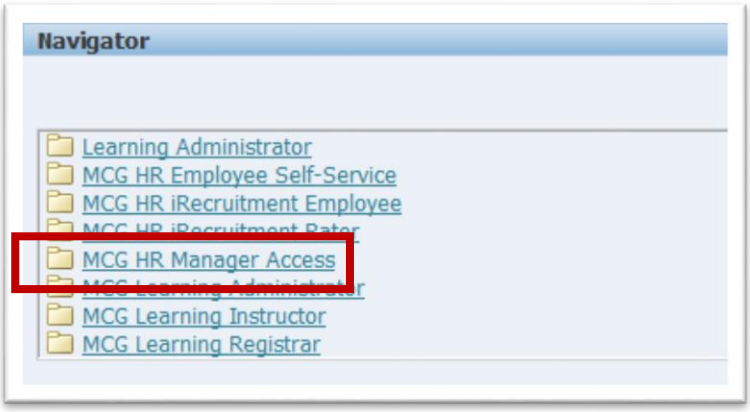
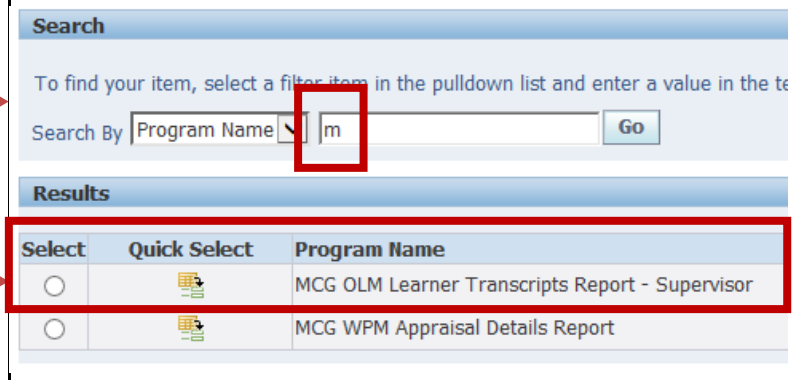
| Step | Action | |
|---|---|---|
| | • Log into the **e-portal**<br>• Enter in your username and password.<br>• Click **Login Button.**<br>• The e-Business page will open<br>• Click **Oracle eBusiness.**<br>• Click **Go to Oracle eBusiness**,<br>• Your eBusiness Suite page will open.<br>• Click on **MCG HR Manager Access**<br>• Click on **Learner Home** | **Getting to the Reports Function in OLM.**<br>  <br> |
| 1. | **<u>Search for the class</u>** from the **Learner Home** page.<br><br>Using the **Search Box** at the top-left.<br>• Click the down arrow and select **Class**.<br>• Enter **one word** from the title of the class into the field<br>• Click **go**<br>• A list of classes will appear |  <br>  |

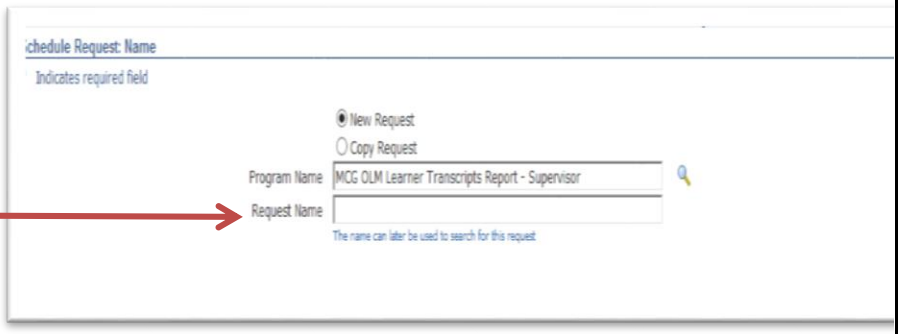
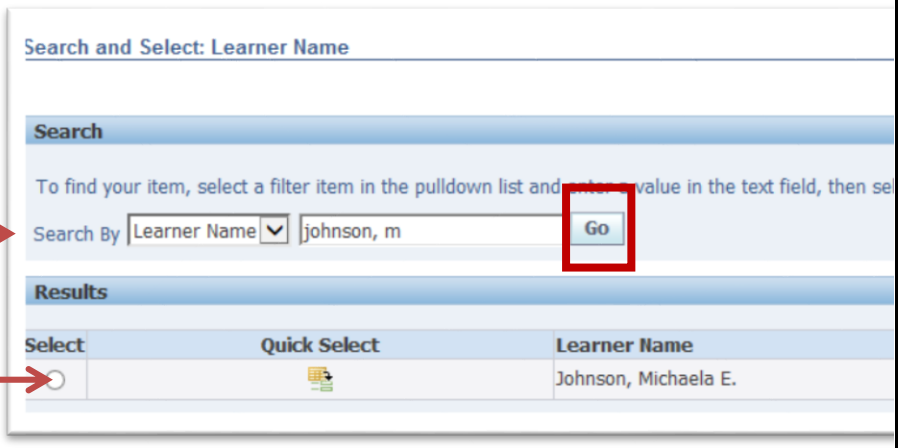
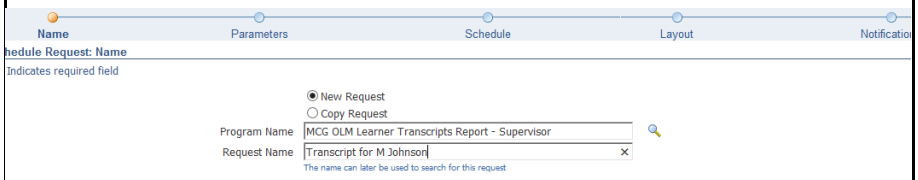
| Step | Action | |
|---|---|---|
| 2. | **<u>Enroll in the Class</u>**.<br><br>• Click Enroll<br><br>**An information screen will open**.<br>• Click Review<br><br>**Another screen will open**.<br>• Click Submit<br><br>You will be returned to the **Learner Home Page.**<br>• A Confirmation will appear on the Learner Home Page.<br><br>A confirming email will be sent to the employee and to you. |  |

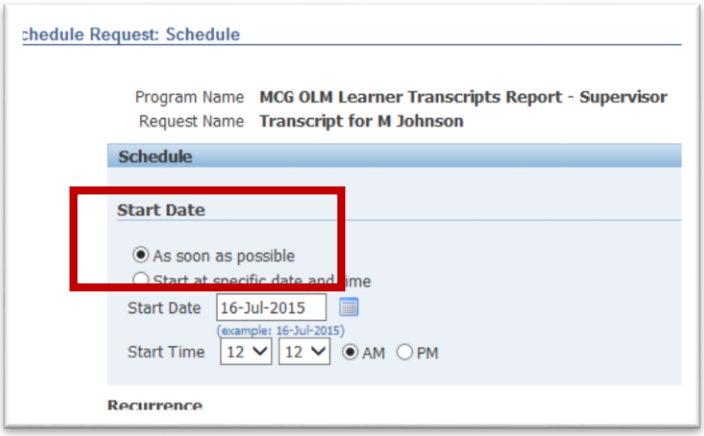
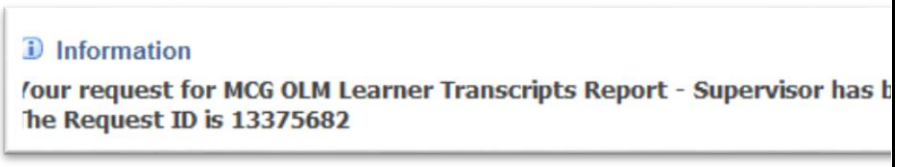
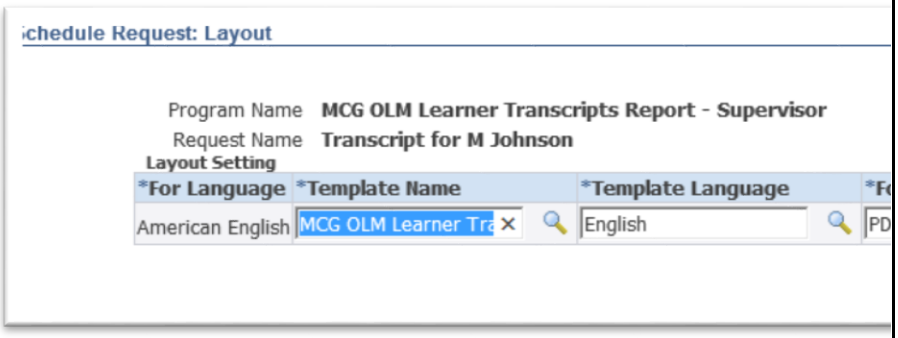
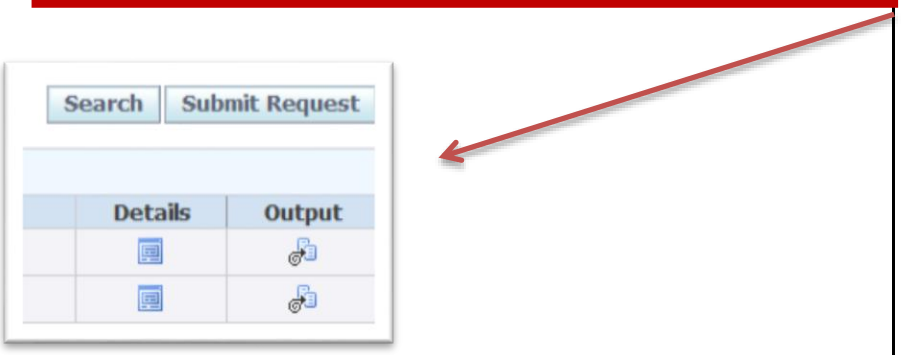
# WITHDRAW A DIRECT REPORT FROM A CLASS

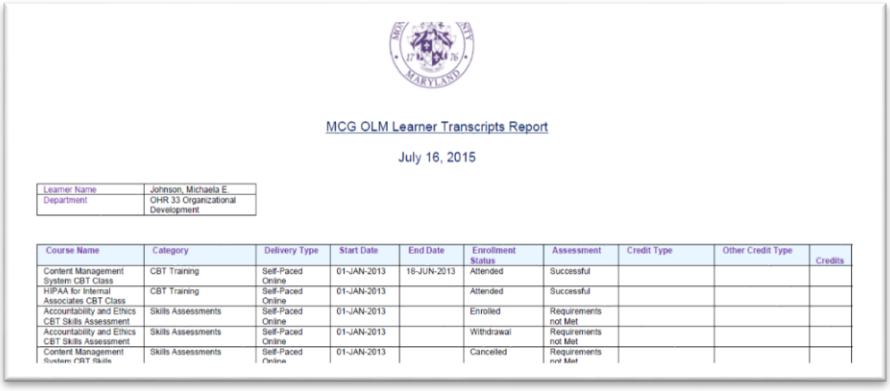
| | | |
|---|---|---|
| | • Log into the **e-portal**<br>• Enter in your username and password.<br>• Click **Login Button.**<br>• The e-Business page will open<br>• Click **Oracle eBusiness.**<br>• Click **Go to Oracle eBusiness**,<br>• Your eBusiness Suite page will open.<br>• Click on **MCG HR Manager Access**<br>• Click on **Learner Home** | **Getting to the Reports Function in OLM.**<br>  <br><br> <br> |
| **1.** | From the **Learner Home**,<br>• Click Unenroll<br>**A new screen will open**.<br>• Click the New Status drop down arrow.<br>• Select Cancelled<br>• Click Finish<br>A confirming email will be sent to the employee and to you. |  <br>  <br>  |

# PRINTING A DIRECT REPORT'S TRANSCRIPT

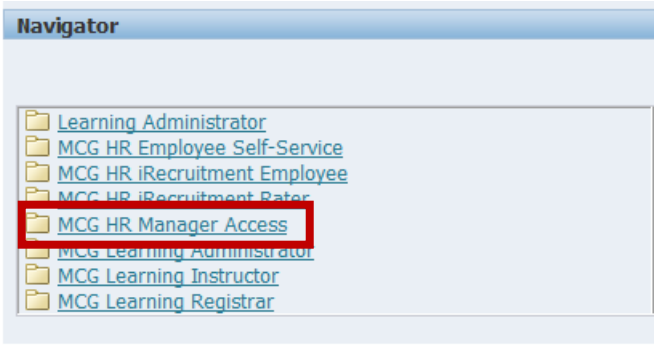
| | | |
|---|---|---|
| | • Log into the **e-portal**<br>• Enter in your username and password.<br>• Click **Login Button.**<br>• The e-Business page will open<br>• Click **Oracle eBusiness.**<br>• Click **Go to Oracle eBusiness**,<br>• Your eBusiness Suite page will open.<br>• Click on **MCG HR Manager Access**<br>  • Click **Submit Reports** | **Getting to the Reports Function in OLM.**<br>  <br><br> <br> |
| **1.** | The **Search and Select Program Screen** will open.<br>• Enter **M** in the **Program Name** search box.<br>• Click **Go.**<br>• Find **MCG OLM Learner Transcripts Report – Supervisor Report**.<br>• Click **Select.**<br>• Click **Submit**. | **What program do you want to use?**<br>  <br> |

| | | |
|---|---|---|
| **2.** | In the **Request Name** box you can create a Title for your Report.<br><br>• Enter the Title in the "**Request Name**" field – such as "Transcript for Mickey Mouse"<br><br>• Click **Submit**. | **What Title do you want to give your report?**<br>  <br> |
| **3.** | **Search and Select Learner Name** Window will open.<br><br>• Enter the **Learner's (Direct Report's) Name** - last name first. - in the Search field.<br><br>• Click the **Go.**<br><br>A **list of Direct Reports** will open.<br><br>• **Select** the correct individual<br><br>• Click **Select.**<br><br>You will return to the **Parameters Screen.**<br><br>• Click **Submit** | **Who do you want the transcript for?**<br>  <br><br>  <br> |

| | | |
|---|---|---|
| **4.** | Scheduling when the Report will be generated.<br><br>• The window defaults to "**as soon a possible"**<br><br>• Click **Submit.**<br><br>A **Layout Screen** will appear.<br><br>• Click **Submit**.<br><br>A **Confirmation Message** will appear, confirming your submittal.<br><br>• Click **Submit**. | **When do you want to run the report?**<br>  <br><br>  <br><br>  <br> |
| **5.** | The **report is now ready** to be viewed and or printed.<br><br>• A list of your reports will appear.<br><br>• Locate the report you want to run.<br><br>• Click the **Output Icon** to the Right of the Title. | **View/Print the Transcript.**<br> <br><br>  <br> |

| | | |
|---|---|---|
| **6.** | The **Transcript** will open. This report will show **all classes since April, 2013.**<br><br>To print the document,<br>• Go to the top of the screen.<br>• Click File.<br>• And follow the prompts.<br><br>For class records **prior to April, 2013**, please go to the OHR Training Webpage and click on Transcripts.<br><br>If they took **training as an outside contractor, intern,** etc., it will be included in there external training record. Please contact OLM.Administrator@montgomerycountymd.gov for additional information. | **Printing the Transcript**.<br>  <br>MCG OLM Learner Transcripts Report<br>July 16, 2015<br><br>Learner Name: Johnson, Michaela E.<br>Department: OHR 33 Organizational Development<br><br>Course Name / Category / Delivery Type / Start Date / End Date / Enrollment Status / Assessment / Credit Type / Other Credit Type / Credits<br>Content Management System CBT Class / CBT Training / Self-Paced Online / 01-JAN-2013 / 18-JUN-2013 / Attended / Successful<br>HIPAA for Internal Associates CBT Class / CBT Training / Self-Paced Online / 01-JAN-2013 / Attended / Successful<br>Accountability and Ethics CBT Skills Assessment / Skills Assessments / Self-Paced Online / 01-JAN-2013 / Enrolled / Requirements not Met<br>Accountability and Ethics CBT Skills Assessment / Skills Assessments / Self-Paced Online / 01-JAN-2013 / Withdrawal / Requirements not Met<br>Content Management System CBT Skills / Skills Assessments / Self-Paced Online / 01-JAN-2013 / Cancelled / Requirements not Met |

# SUBSCRIBING A DIRECT REPORT TO A LEARNING PATH

| Step | Action | |
|---|---|---|
| | • Log into the **e-portal**<br>• Enter in your username and password.<br>• Click **Login Button.**<br>• The e-Business page will open<br>• Click **Oracle eBusiness.**<br>• Click **Go to Oracle eBusiness**,<br>• Your eBusiness Suite page will open.<br>• Click on **MCG HR Manager Access**<br>  • Click **Submit Reports** | **Getting to the Reports Function in OLM.**<br> <br><br> <br> |
| | • Click on **MCG HR Manager Access**<br><br>**Learner Management for Managers** will open.<br><br>• Click **Learner Home** |  <br><br> <br> |

| Step | Action | |
|---|---|---|
| 1. | A screen will open with a **list of all your direct reports**.<br><br>We have divided and enlarged the screen shot here so you can see the detail.<br><br>To view an employee's Learner Home, click **View**. | **Full Screen View**<br><br>**Split Screen View #1 of 2**<br><br>**Split Screen View #2 of 2** |
| 2. | The employee's **Leaner Home** opens and you can view: | |

**Full Screen View**

| Focus Name | Assignment Number | Job | Position | Department | Employee Number | View | Details |
|---|---|---|---|---|---|---|---|
| Brady, Anita K. | | | | | | | |
| Driscoll, Lorraine J. | 20160 | Manager | 016090.Program Manager I.000834.FT.T. | OHR 33 Change Management and Organizational Development | 20160 | | |
| Hassanein, Mabrouka I. | 19306 | Manager | 016090.Program Manager I.000834.FT.T. | OHR 33 Change Management and Organizational Development | 19306 | | |
| Heyman, Irving A. | 10413-4 | Manager | 016090.Program Manager I.000834.FT.T. | OHR 33 Change Management and Organizational Development | 10413 | | |
| Hillson, Natalie | 75 | Contingent Worker | 017747.Contingent Worker.007646.FT.N. | OHR 33 Organizational Development | | | |
| Johnson, Michaela E. | 9300 | Specialist | 012928.Human Resources Specialist III.000121.FT.P. | OHR 33 Organizational Development | 9300 | | |
| Marks, Leslie Y. | 14957-2 | Manager | 016090.Program Manager I.000834.FT.T. | OHR 33 Change Management and Organizational Development | 14957 | | |
| Nachman, Gail R. | 16706-2 | Manager | 016090.Program Manager I.000834.FT.T. | OHR 33 Change Management and Organizational Development | 16706 | | |
| Ramet, Tewodros | 3468 | Specialist | 013496.Human Resources Specialist III.000121.FT.P. | OHR 33 Organizational Development | 3468 | | |
| Rhodes, Anithia M. | 9953 | Specialist | 011308.Administrative Specialist I.000152.FT.P.1 | OHR 33 Organizational Development | 9953 | | |
| Robey, Shannon | 48 | | | Montgomery County MD | | | |

**Split Screen View #1 of 2**

| Focus Name | Assignment Number | Job | Position |
|---|---|---|---|
| Brady, Anita K. | | | |
| Driscoll, Lorraine J. | 20160 | Manager | 016090.Program Manager I.000834.FT.T. |
| Hassanein, Mabrouka I. | 19306 | Manager | 016090.Program Manager I.000834.FT.T. |
| Heyman, Irving A. | 10413-4 | Manager | 016090.Program Manager I.000834.FT.T. |
| Hillson, Natalie | 75 | Contingent Worker | 017747.Contingent Worker.007646.FT.N. |
| Johnson, Michaela E. | 9300 | Specialist | 012928.Human Resources Specialist III.000121.FT.P. |
| Marks, Leslie Y. | 14957-2 | Manager | 016090.Program Manager I.000834.FT.T. |
| Nachman, Gail R. | 16706-2 | Manager | 016090.Program Manager I.000834.FT.T. |
| Ramet, Tewodros | 3468 | Specialist | 013496.Human Resources Specialist III.000121.FT.P. |
| Rhodes, Anithia M. | 9953 | Specialist | 011308.Administrative Specialist I.000152.FT.P.1 |
| Robey, Shannon | 48 | | |

**Split Screen View #2 of 2**

| Department | Employee Number | View | Details |
|---|---|---|---|
| | | | |
| OHR 33 Change Management and Organizational Development | 20160 | | |
| OHR 33 Change Management and Organizational Development | 19306 | | |
| OHR 33 Change Management and Organizational Development | 10413 | | |
| OHR 33 Organizational Development | | | |
| OHR 33 Organizational Development | 9300 | | |
| OHR 33 Change Management and Organizational Development | 14957 | | |
| OHR 33 Change Management and Organizational Development | 16706 | | |
| OHR 33 Organizational Development | 3468 | | |
| OHR 33 Organizational Development | 9953 | | |
| Montgomery County MD | | | |

Learner Home | Course Catalog | Learning History

Current Learning | Requested Learning | Forums and Chats

Search Course Exact Phrase Go Advanced Search

Employee Name **Johnson, Michaela E.** Employee Number **9300**

Organization Email Address noreply@mcgov.org Business Group **Montgomery County MD**

**Learning Paths**

List of all your active Learning Paths

Create

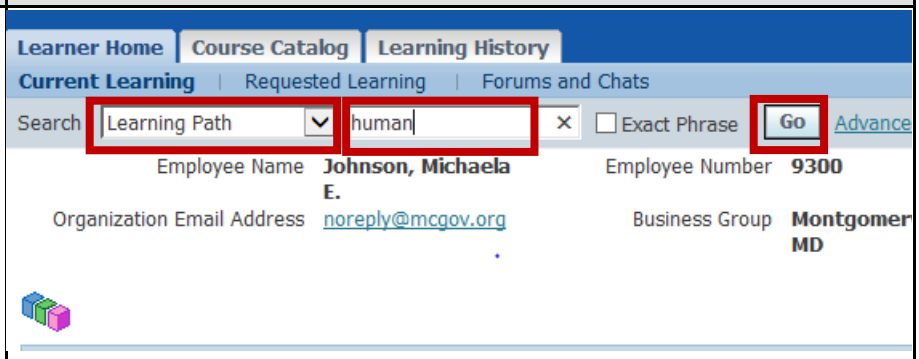
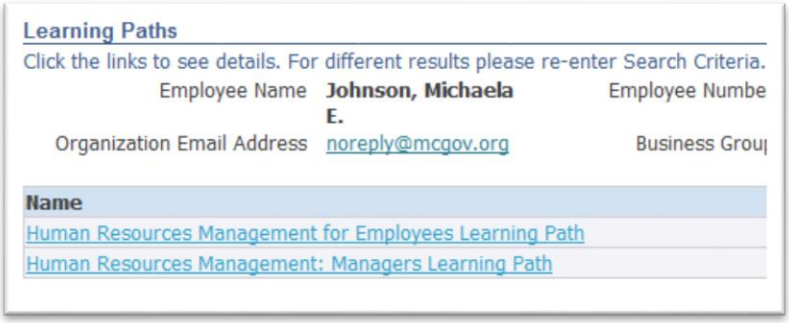
| Learning Path Name | Learning Path Status | Source | Mandatory Courses Completed | Start Date | Due Date | Completion Date | Update | Move to History | Unsubscribe |
|---|---|---|---|---|---|---|---|---|---|
| Human Resources Management for Employees Learning Path | Active | Manager | 1 of 2 | 01-Jan-2013 | 26-Jul-2018 | | | | |
| Aspiring Supervisor Learning Path | Active | Catalog | 2 of 6 | 01-Jan-2013 | 26-Feb-2020 | | | | |

**Enrollments**

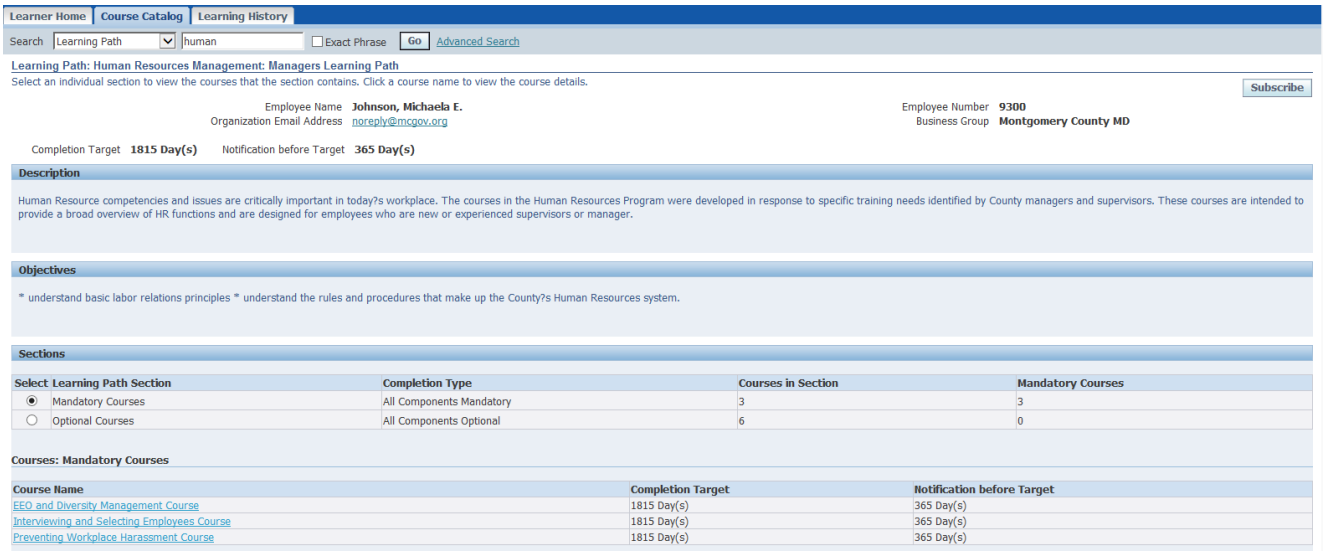
Enrollments include all current enrollments, including those in classes that are part of a learning certification or learning path.

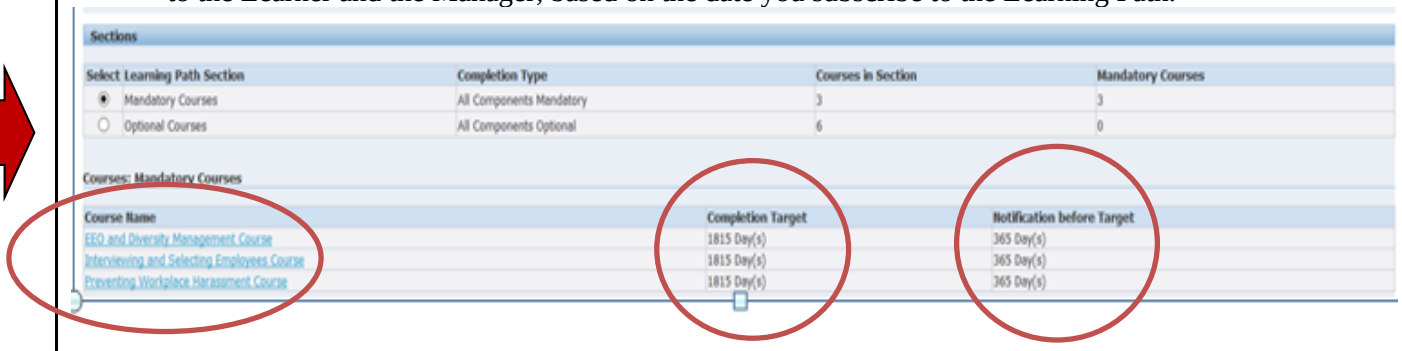
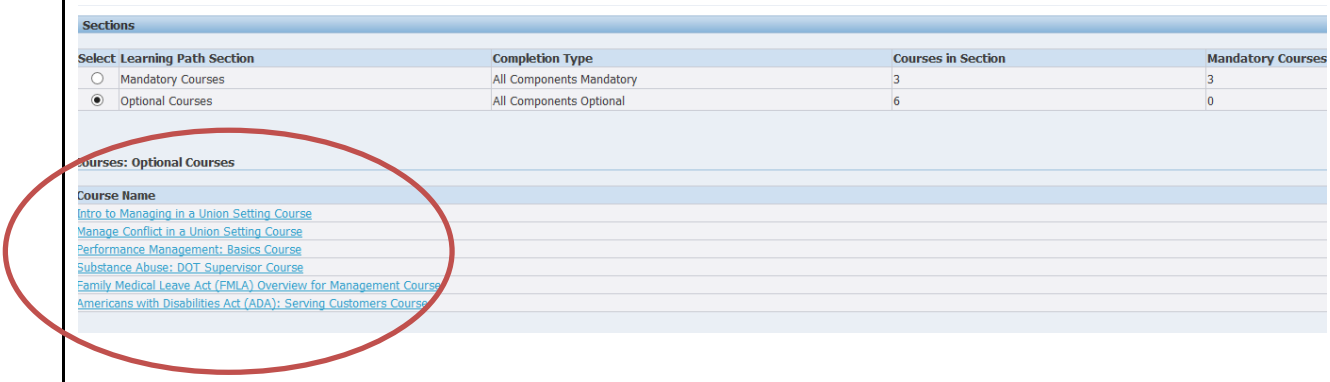
Show Key Notation

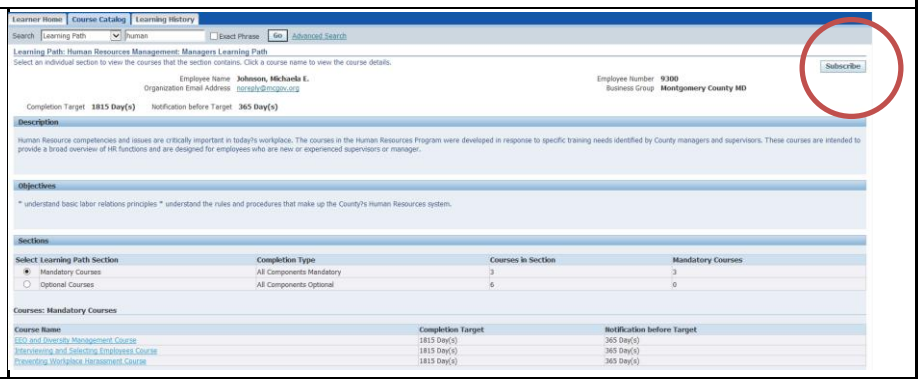
| Class Name | Type | Status | Item in | Start Date | End Date | Completion Date | Time Zone | Play | Move to History | Unenroll | Evaluate or Sign |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Drug Free Workplace - Non DOT Supervisors Class 2015-03-26 | | Enrolled | | 26-Mar-2015 13:30:00 | 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 | | | | |

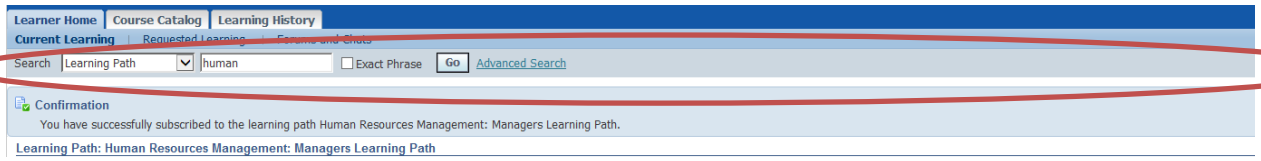
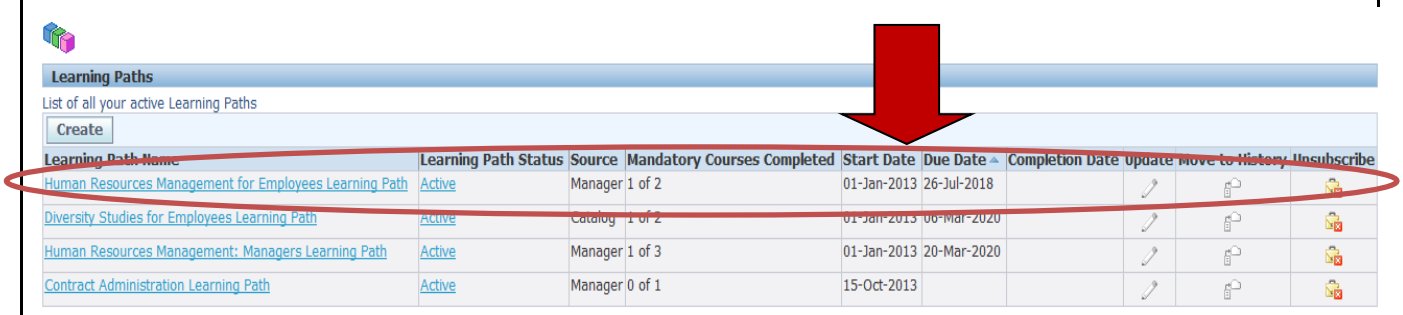
| Step | Action | |
|---|---|---|
| 3. | **<u>Search for the Learning Path</u>** from the **Learner Home** page.<br><br>Using the **Search Box** at the top-left.<br>• Click the down arrow and select **Learning Path**.<br>• Enter **one word** from the title of the class into the field<br>• Click **go**<br>• A list of **Learning Paths will appear** |  |
| 4. | **<u>Click on the Learning Path you want to select.</u>** |  |
| 5. | **<u>The Learning Path Screen will open.</u>** | |

| Step | Action |
|---|---|
| 6. | You can view the following:<br>• **Name**<br>• **Description**<br>• **Objectives**<br>• Sections: The coures included in the Learning Path by **Mandatory** Section and **Optional** Section. |



| Step | Action |
|---|---|
| 7. | **<u>Viewing the Sections: Mandatory Classes</u>**<br><br>• Click the **Mandatory Courses** radio button.<br>• The list will appear under **Course Name**.<br>• To the right of the title will be the **Completion Target** – the number of days to complete the course from the date you subscribe to the Learning Path.<br>• The next column shows the **Notification Date** – this indicates when an automated reminder will be sent to the Learner and the Manager, based on the date you subscribe to the Learning Path.<br><br>  <br><br><br>**<u>Viewing the Sections: Optional Classes</u>**<br><br>Click the **Optional Courses** radio button.<br>The list will appear under Course Name.<br><br>  <br> |
| 8. | **<u>To Subscribe your direct report, click Subscribe</u>** |

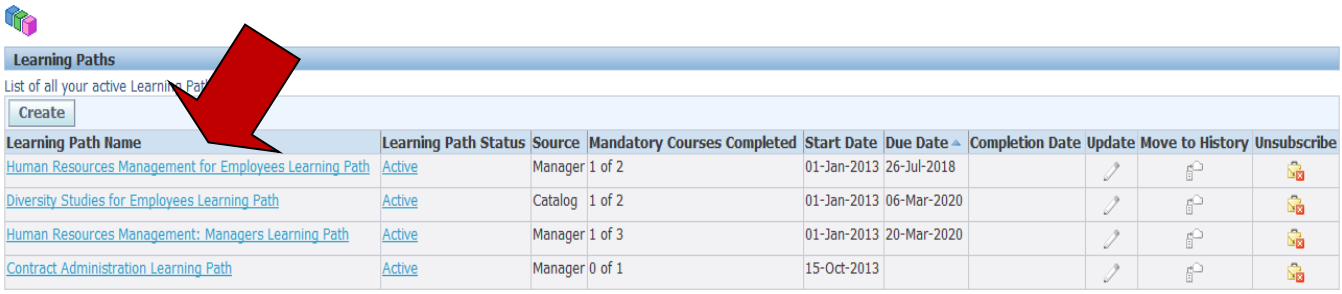


| Step | Action |
|---|---|
| 9. | You will **retruned to the Learning Path Page.**<br>• A Confirmation will appear at the top.<br>• Click the Learner **Home Page Tab**.<br>  <br><br>**The Learner Home Page has been updated.**<br>• The new Learning Path has been added under **Learning Path Name.**<br>• Note that the **start date and end date** for the Learning Path are listed.<br>  <br> |

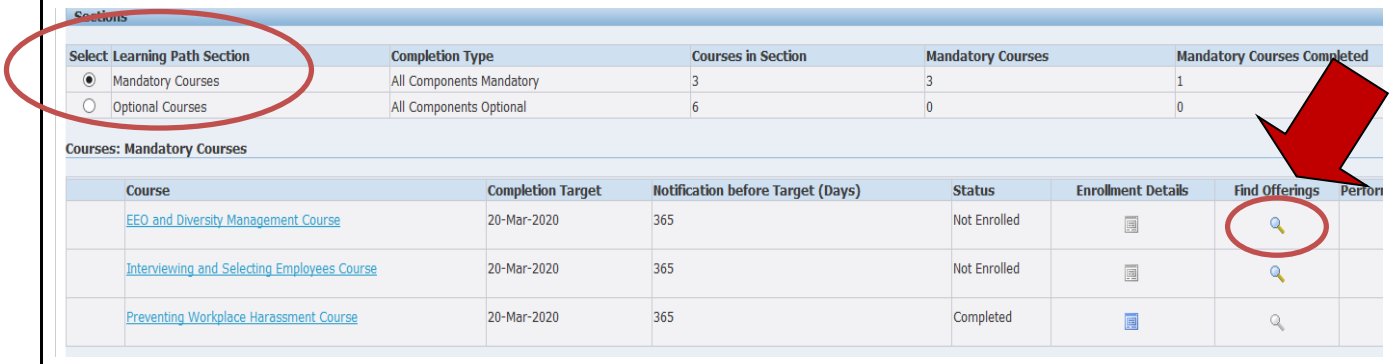
# SUBSCRIBE A DIRECT REPORT IN A CLASS WITHIN A LEARNING PATH

1. **Open the employee's Learner Home Page.**

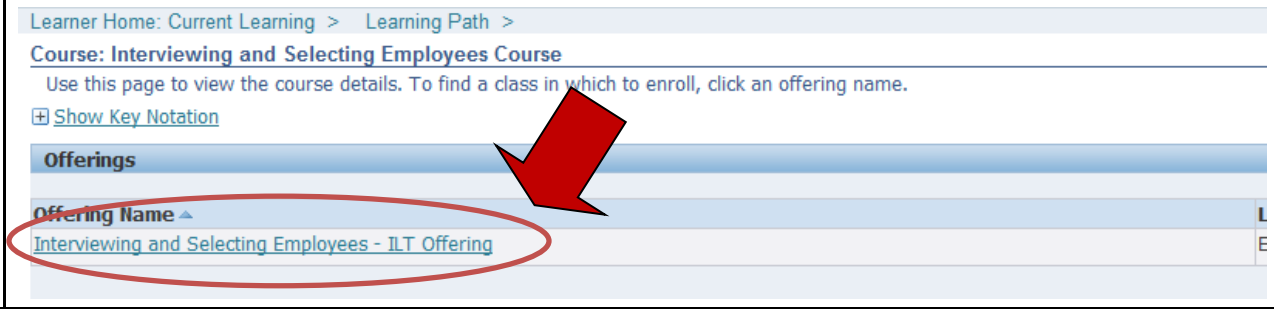
   From the Learning Paths Section, click title of the Path you want access to.



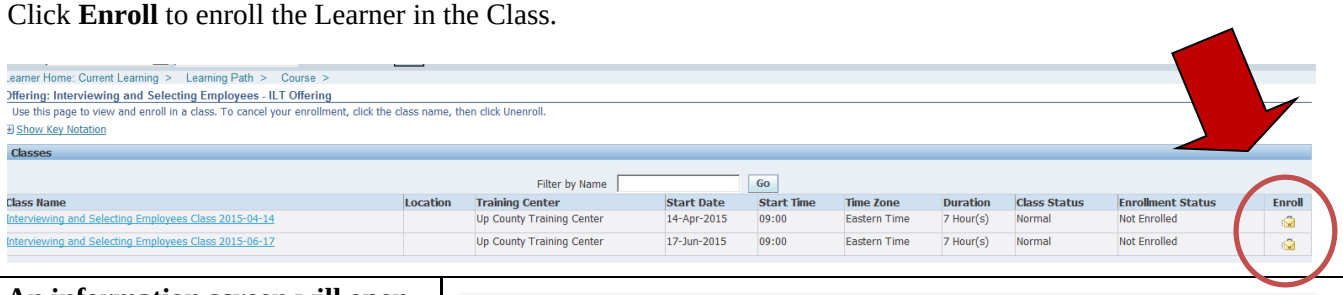

2. **Under Sections**
   Select either **Mandatory Courses** or **Optional Courses** to view the list of courses for that section.
   Click **Find Offering**.




3. The **Offerings Screen** will open.
   Click the **Offering Name**.



**4.** The **Classes Screen** will open.
A list of upcoming classes will open up.
Click **Enroll** to enroll the Learner in the Class.

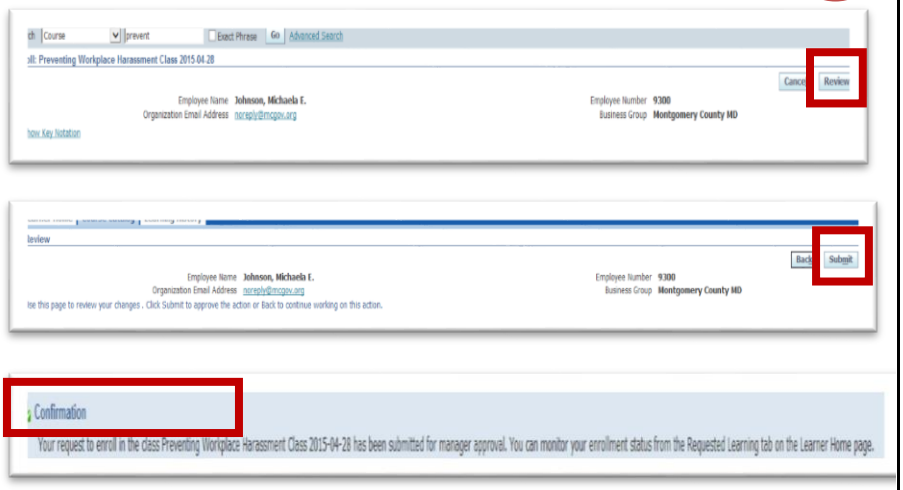



5. **An information screen will open**.
- Click Review

**Another screen will open**.
- Click Submit

You will be returned to the **Learner Home Page.**
- A Confirmation will appear on the Learner Home Page.

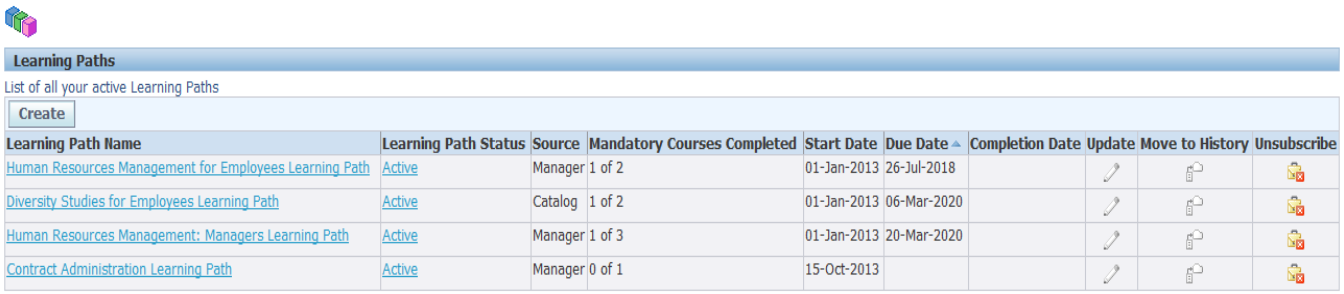
A confirming email will be sent to the employee and to you.



# CHECK PROGRESS TTOWARD COMPLETION OF A LEARNING PATH

1. **Open the employee's Learner Home Page.**

   From the Learning Paths Sectin, click title of the Path you want to view..



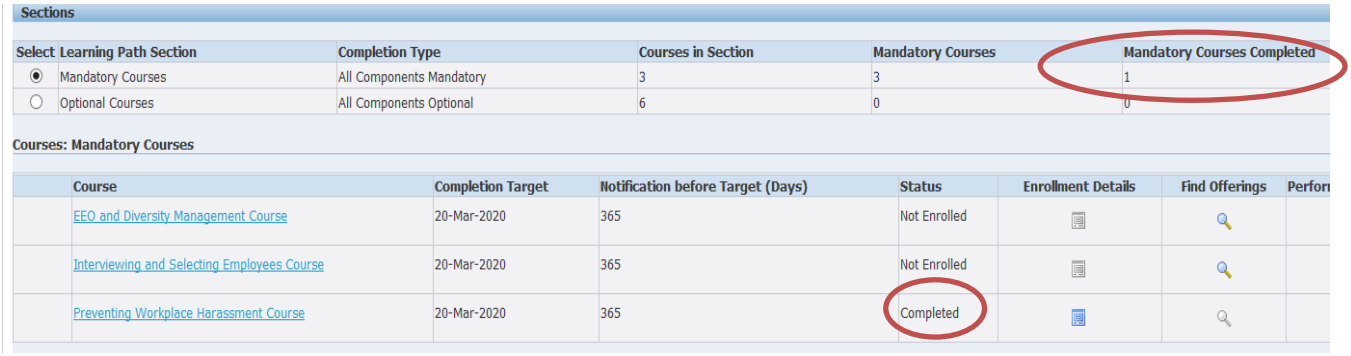
Learning Paths

List of all your active Learning Paths

Create

| 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 | | | | |
| Diversity Studies for Employees Learning Path | Active | Catalog | 1 of 2 | 01-Jan-2013 | 06-Mar-2020 | | | | |
| Human Resources Management: Managers Learning Path | Active | Manager | 1 of 3 | 01-Jan-2013 | 20-Mar-2020 | | | | |
| Contract Administration Learning Path | Active | Manager | 0 of 1 | 15-Oct-2013 | | | | | |

2. Click on the **Mandatory Courses** radio button.
   The course list appears, and indicates which courses the Leaner has taken.



Sections

| Select | Learning Path Section | Completion Type | Courses in Section | Mandatory Courses | Mandatory Courses Completed |
|---|---|---|---|---|---|
| ◉ | Mandatory Courses | All Components Mandatory | 3 | 3 | 1 |
| ○ | Optional Courses | All Components Optional | 6 | 0 | 0 |

Courses: Mandatory Courses

| Course | Completion Target | Notification before Target (Days) | Status | Enrollment Details | Find Offerings | Perfor |
|---|---|---|---|---|---|---|
| EEO and Diversity Management Course | 20-Mar-2020 | 365 | Not Enrolled | | | |
| Interviewing and Selecting Employees Course | 20-Mar-2020 | 365 | Not Enrolled | | | |
| Preventing Workplace Harassment Course | 20-Mar-2020 | 365 | Completed | | | |

3. Repeat the Process for the Optional Courses..

## If you have problems with any of these functions contact:

Anithia Rhodes, 240-777-5064, Anithia.rhodes@montgomerycountymd.gov

Michaela Johnson, 240-777-5063, michaela.johnson@montgomerycountymd.gov