

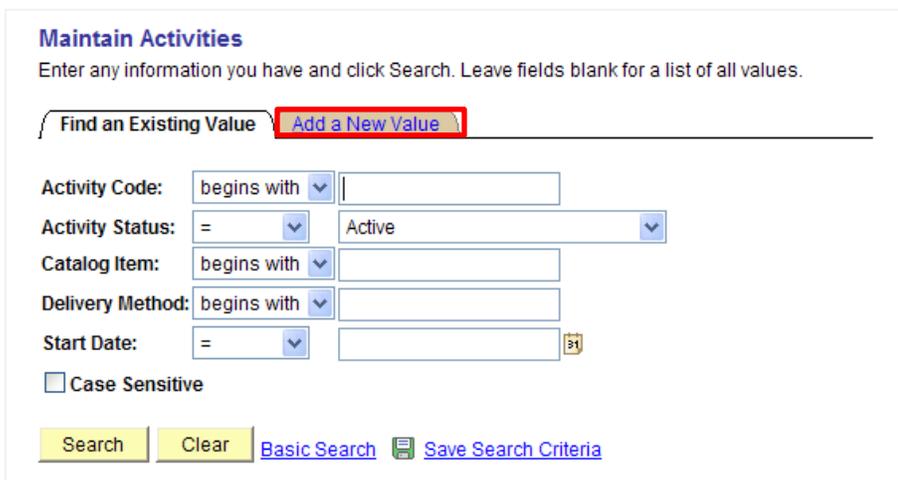
Creating an Activity - Instructor Led

Within ELM, activities are the actual classes associated with a Catalog Item. There will be a separate Learning Component Session added for each date and each facility that the class is offered.

1. In OAKS ELM, navigate to **Enterprise Learning > Catalog > Maintain Activities**.



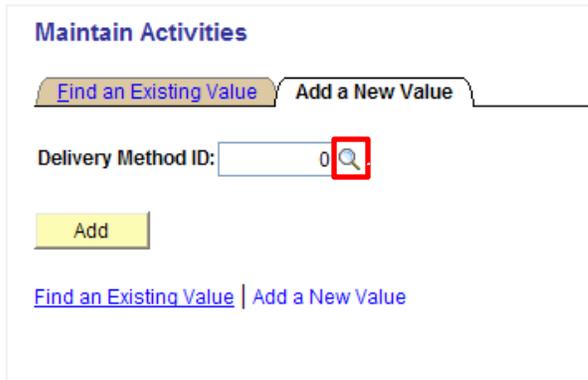
2. The **Maintain Activities** page appears. Click the **Add a New Value** tab.



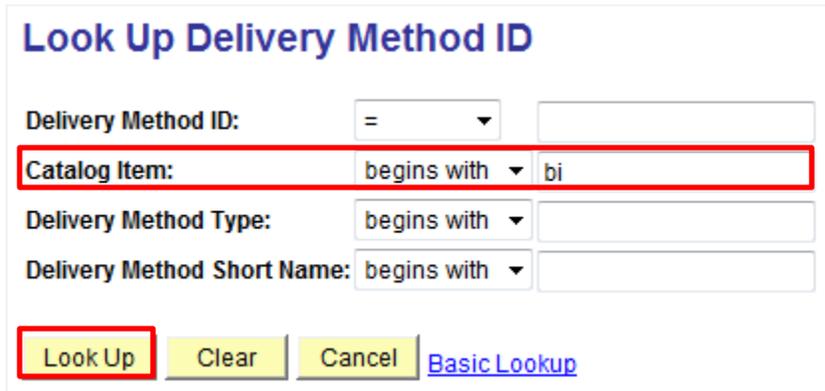
The screenshot shows the 'Maintain Activities' page. At the top, there is a title 'Maintain Activities' and a subtitle 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a red rectangular box. Below the tabs, there are several search criteria fields: 'Activity Code' (with a dropdown set to 'begins with' and an empty input field), 'Activity Status' (with a dropdown set to '=' and a dropdown set to 'Active'), 'Catalog Item' (with a dropdown set to 'begins with' and an empty input field), and 'Delivery Method' (with a dropdown set to 'begins with' and an empty input field). There is also a 'Start Date' field with a dropdown set to '=' and an empty input field. Below these fields, there is a checkbox for 'Case Sensitive'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

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- On the **Add a New Value** tab, click the magnifying glass next to the *Delivery Method ID* field.



- Enter the name of the item in the **Catalog Item** field to search for the delivery method.



- Click the **Look Up** button.
- Click the appropriate link from the list of available **Catalog Items**. This will associate your activity with the appropriate Catalog Item (course.)

Search Results
View All

Delivery Method ID	Catalog Item	Delivery Method Type
1586	BI Analysis Studio for - GL (DAS-BI-275)	Instructor Led
2014	BI Analysis Studio for - GL (DAS-BI-275)	Web Based
1527	BI Dashboard for FIN (DAS-BI-111)	Instructor Led
1528	BI Dashboard for HCM (DAS-BI-112)	Instructor Led
1595	BI Query Studio - AP/PO/Spend (DAS-BI-214)	Instructor Led
1596	BI Query Studio - Compensation (DAS-BI-215)	Instructor Led
1424	BI Query Studio - GL (DAS-BI-211)	Instructor Led
1426	BI Query Studio - T&E (DAS-BI-212)	Instructor Led
1425	BI Query Studio - WFP (DAS-BI-213)	Instructor Led
1597	BI Report Studio Basics - AP/PO/Spend (DAS-BI-224)	Instructor Led
1598	BI Report Studio Basics - Compensation (DAS-BI-225)	Instructor Led
1427	BI Report Studio Basics - GL (DAS-BI-221)	Instructor Led
1429	BI Report Studio Basics - T&E (DAS-BI-222)	Instructor Led
1428	BI Report Studio Basics - WFP (DAS-BI-223)	Instructor Led

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7. The **Delivery Method ID** field is populated with the **Catalog Item** code. Click the **Add** button.

Maintain Activities

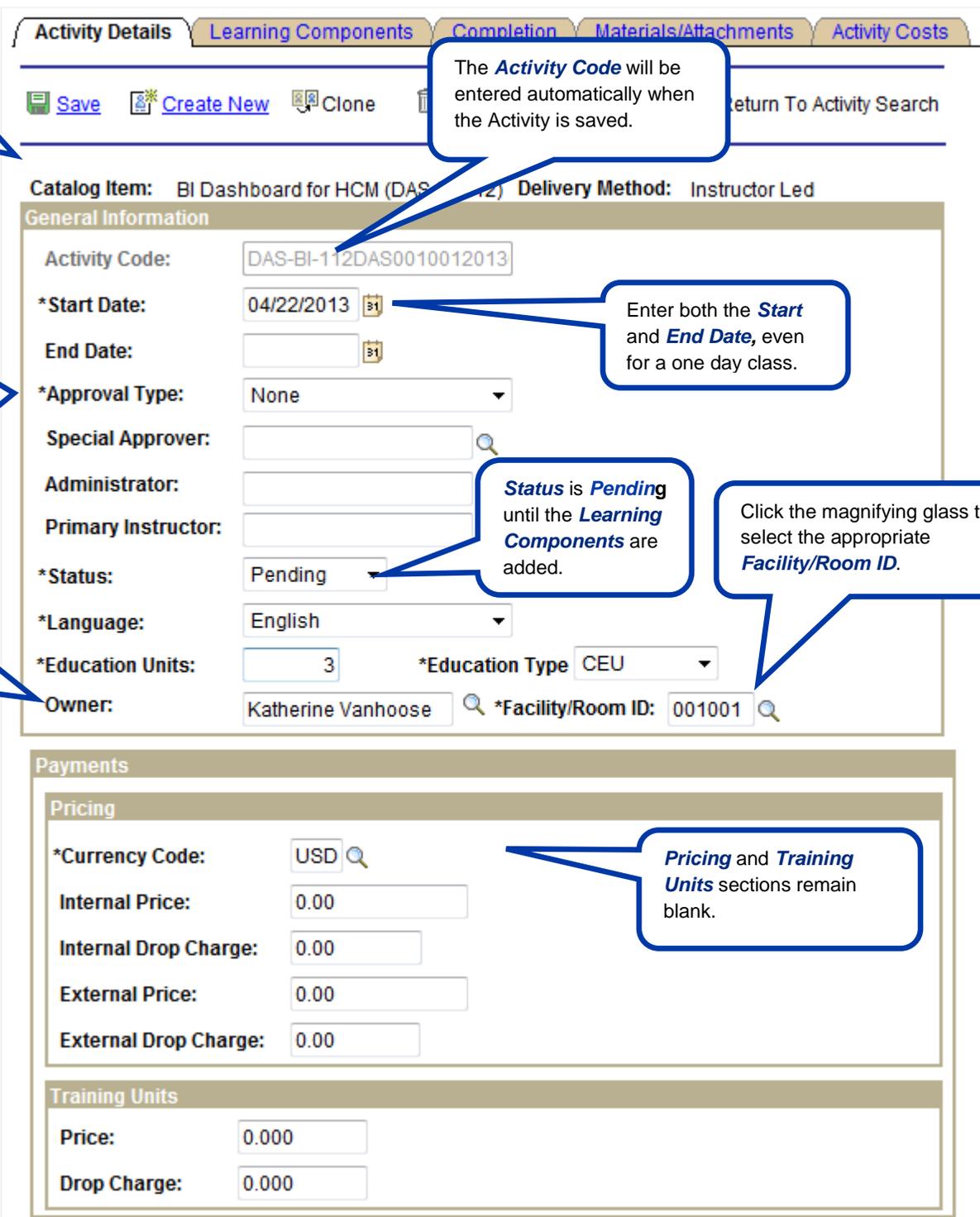
[Find an Existing Value](#) [Add a New Value](#)

Delivery Method ID: 

Add

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8. On the **Activity Details** tab, add the specific details to your activity:



Activity Details | Learning Components | Completion | Materials/Attachments | Activity Costs

Save | Create New | Clone | Return To Activity Search

Catalog Item: BI Dashboard for HCM (DAS-112) Delivery Method: Instructor Led

General Information

Activity Code: DAS-BI-112DAS0010012013

*Start Date: 04/22/2013

End Date:

*Approval Type: None

Special Approver:

Administrator:

Primary Instructor:

*Status: Pending

*Language: English

*Education Units: 3 *Education Type: CEU

Owner: Katherine Vanhooose *Facility/Room ID: 001001

Payments

Pricing

*Currency Code: USD

Internal Price: 0.00

Internal Drop Charge: 0.00

External Price: 0.00

External Drop Charge: 0.00

Training Units

Price: 0.000

Drop Charge: 0.000

Fields with * asterisks are **required**.

The **Activity Code** will be entered automatically when the Activity is saved.

Approval **Type** will be the default added for Catalog Item. You can change.

Determine the **Owner** within your agency.

Enter both the **Start** and **End Date**, even for a one day class.

Status is **Pending** until the **Learning Components** are added.

Click the magnifying glass to select the appropriate **Facility/Room ID**.

Pricing and Training Units sections remain blank.

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Learning Period

Learning Period: Days

Send Warning: Days

Published Duration

Days: Hours: Minutes:

Display Start and End Date

Start Reminder

Send Reminder: 0 Days Reminder Date:

Reminder Template:

Enrollment

Max Enrollment: 8

Enrollment Total: 0

Total Open Enrollment: --

Min Enrollment: 4

Min Enroll Days: 0 Days

Overbook: 0 %

Reserved Seats: 0

Last Enroll: Days Before the Start Date

Last Enroll Date:

Last Enroll Date = Start Date

Enforce Enrollment Limit

Restrict to Programs

Waitlist

Enable Waitlist

Waitlist Capacity: 2

Waitlist Total: 0

Waitlist Threshold: 0

Learning Period and **Published Duration** sections remain blank. These are used for web-based courses.

Enter a number value for the number of days before the activity start date that the system will send the reminder notification to learners.

Click the magnifying glass and select the **LM_ACT_RMNDR** template — the generic system reminder template.

Max Enrollment is the amount of seats available in the **Facility/Room**.

Min Enrollment is the number of seats that need to be filled in order to conduct the class.

Enter the **Last Enroll Date** or select **Last Enroll Date = Start Date**.

Select **Enforce Enrollment Limit** to enforce max enrollment rules.

Select **Enable Waitlist**.

Enter the number of learners that can be placed on the activity waitlist in **Waitlist Capacity**.

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Grades and Attendance

- Auto Mark Completion
- Launchable from History
- Enforce Prerequisites
- Mark Completion After: Days
- Allow Completion from History

Auto Mark Completion is used to automatically mark sessions complete after a session occurs.

Launchable from History and **Allow Completion from History** are used for **web-based courses**.

Select **Enforce Prerequisites** only if there are classes the student **MUST** take before enrolling in this one.

Mark Completion After, indicates the number of days after the session occurs that the system will Auto Mark Complete the session.

- At the bottom of the **Activity Details** tab, your agency's Learning Environment will already be selected as a **Learning Environment**. This fills the **Learner Group** field with the learner groups designated at the Catalog Item level.

Click the **Add Learning Environment** link.

Learning Environments			
Customize Find View All		First 1 of 1 Last	
Learning Environment	Primary	Default Learner Groups	
Administrative Services	<input checked="" type="checkbox"/>	Default Learner Groups	
+ Add Learning Environment			

- Select **State of Ohio** as the other Learning Environment.

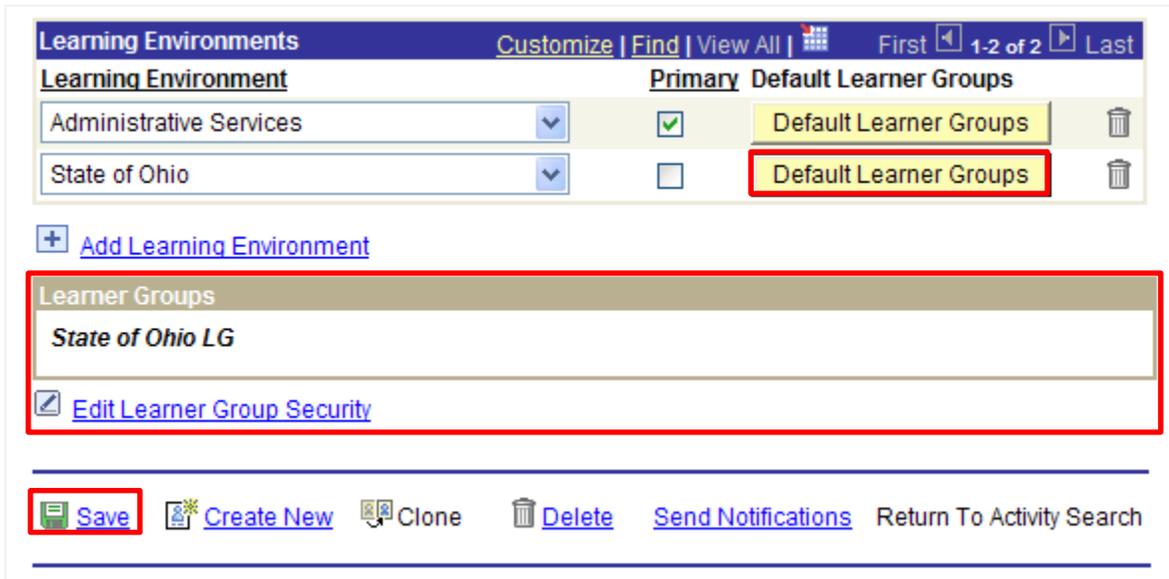
Learning Environments			
Customize Find View All		First 1-2 of 2 Last	
Learning Environment	Primary	Default Learner Groups	
Administrative Services	<input checked="" type="checkbox"/>	Default Learner Groups	
State of Ohio	<input type="checkbox"/>	Default Learner Groups	
+ Add Learning Environment			

Notice that the default learning environment, which is your agency environment, is ALWAYS the **Primary** environment.

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11. Click the **Default Learner Groups** button next to *State of Ohio*.

The Learner Groups associated at the catalog item level will be populated in the **Learner Groups** section.



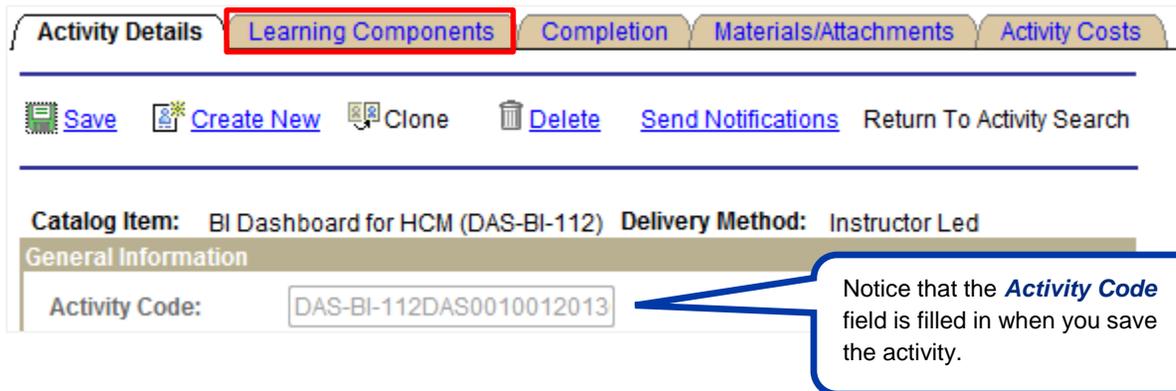
The screenshot shows the 'Learning Environments' interface. At the top, there are navigation options: 'Customize | Find | View All |' and 'First 1-2 of 2 Last'. Below this is a table with columns for 'Learning Environment', 'Primary', and 'Default Learner Groups'. The 'State of Ohio' row has a checked checkbox in the 'Primary' column and a 'Default Learner Groups' button highlighted with a red box in the 'Default Learner Groups' column. Below the table is a '+ Add Learning Environment' link. A 'Learner Groups' section is highlighted with a red box, containing 'State of Ohio LG' and an 'Edit Learner Group Security' link. At the bottom, there is a toolbar with buttons for 'Save', 'Create New', 'Clone', 'Delete', 'Send Notifications', and 'Return To Activity Search'. The 'Save' button is highlighted with a red box.

Note: You can remove any learner groups that should not be associated at the activity level by using the **Edit Learner Group Security** link. You cannot add additional learner groups at the activity level. To add a learner group, maintain the catalog item and add the learner group there.

12. Click **Save**.

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13. Next, click the **Learning Components** tab.



Activity Details **Learning Components** Completion Materials/Attachments Activity Costs

 Save  Create New  Clone  Delete [Send Notifications](#) [Return To Activity Search](#)

Catalog Item: BI Dashboard for HCM (DAS-BI-112) Delivery Method: Instructor Led

General Information

Activity Code:

Notice that the **Activity Code** field is filled in when you save the activity.

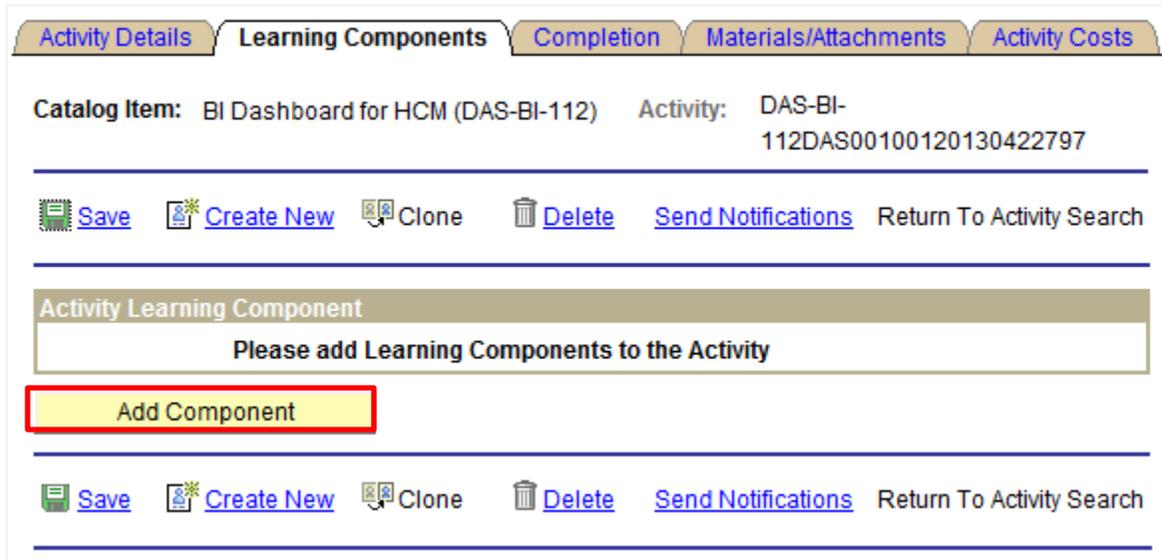
NOTE: The Activity code is the unique ID for the activity. It can be used search for activity rosters or to enroll learners into this specific activity.

For example: DAS-BI-112DAS00100120130422797

- DAS-BI-112 = Course Code
- DAS = Primary Learning Environment for the Activity
- 001001 = Facility/Room ID
- 2013 = Year
- 04 = Month
- 22 = Day
- 797 = Random Generated 3 digit #

Creating an Activity - Instructor Led

14. On the **Learning Components** tab, click the **Add Component** button.



Activity Details | **Learning Components** | Completion | Materials/Attachments | Activity Costs

Catalog Item: BI Dashboard for HCM (DAS-BI-112) Activity: DAS-BI-112DAS00100120130422797

[Save](#) [Create New](#) [Clone](#) [Delete](#) [Send Notifications](#) [Return To Activity Search](#)

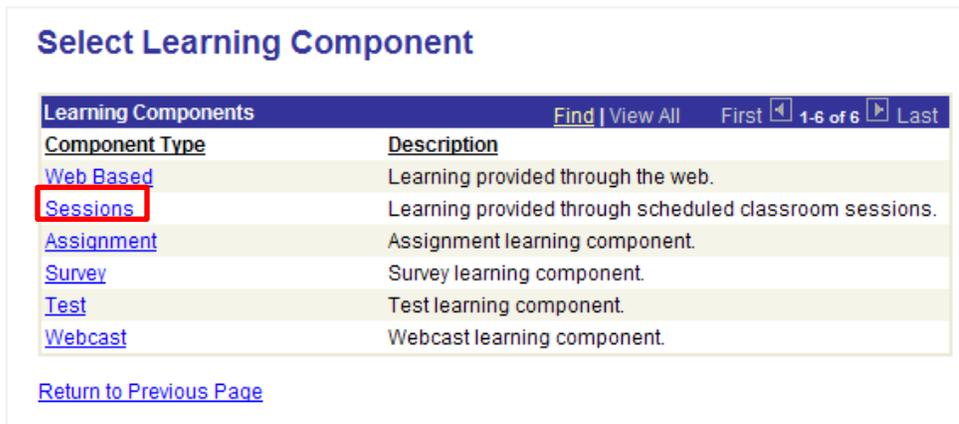
Activity Learning Component

Please add Learning Components to the Activity

Add Component

[Save](#) [Create New](#) [Clone](#) [Delete](#) [Send Notifications](#) [Return To Activity Search](#)

15. For the classroom portion, select **Sessions**.



Select Learning Component

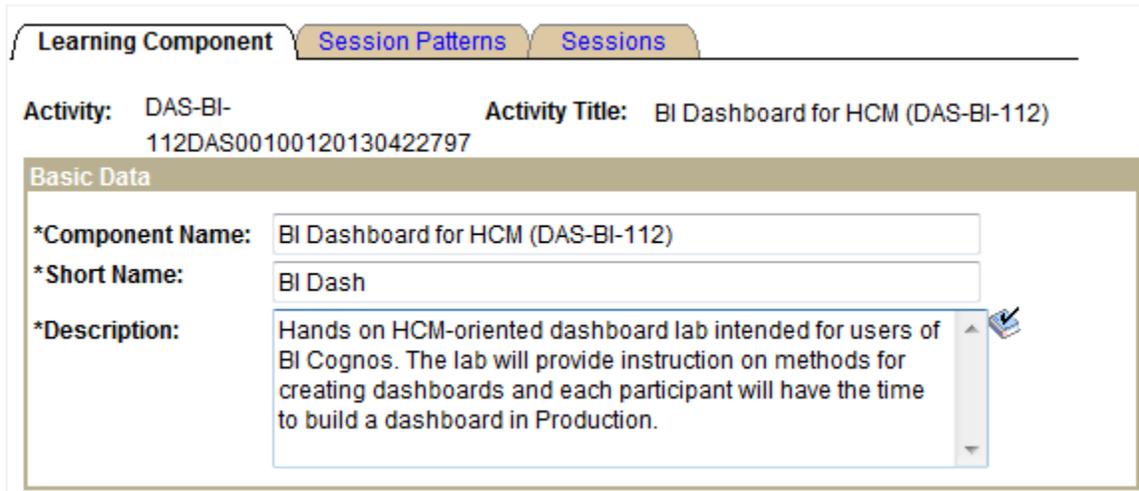
Learning Components Find | View All First 1-6 of 6 Last

Component Type	Description
Web Based	Learning provided through the web.
Sessions	Learning provided through scheduled classroom sessions.
Assignment	Assignment learning component.
Survey	Survey learning component.
Test	Test learning component.
Webcast	Webcast learning component.

[Return to Previous Page](#)

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- Complete the **Basic Data** fields, (**Component Name**, **Short Name**, and **Description** are required fields) and click the **Save** button.



- Click the **Sessions** tab.

- Click the **Add Session** button.



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19. On the **Session Details** screen, verify the **Date**.

Learning Component - BI Dashboard for HCM (DAS-BI-

Session Details

*Date: **Display Facility to Learner**

Facility: 

Room: 

20. Click the magnifying glass next to the **Facility** field.

21. On the **Look Up Facility** screen, select the building by clicking the appropriate link.

Look Up Facility

Search by: =

[Advanced Lookup](#)

Search Results

[View All](#) First 1-17 of 17 Last

Description	Short Description	City	State	Country
State Library of Ohio	StateLibr	Columbus	OH	USA
OSP FINDLEY DISTRICT HEADQUARTERS	OSPFIND	Findlay	OH	USA
OSP BUCYRUS DISTRICT HEADQUARTERS	OSPBUCY	Bucyrus	OH	USA
OSP CANTON PATROL POST	OSP CANTON	North Canton	OH	USA
OSP WARREN DISTRICT HEADQUARTERS	OSPWARREN	Southington	OH	USA
OSP CAMBRIDGE DISTRICT HEADQUARTERS	OSP CAMBR	Cambridge	OH	USA
OSP WILMINGTON DISTRICT HEADQUARTERS	OSPWILMING	Wilmington	OH	USA
OSP JACKSON DISTRICT HEADQUARTERS	OSP JACKSON	Jackson	OH	USA
DAS General Services Division	DAS	Columbus	OH	USA
James A. Rhodes State Office Tower	SOT	Columbus	OH	USA

To search by facility's description, click the drop down arrow and select **Facility Description**.

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22. To select the room, click the magnifying glass next to the **Room** field.

Learning Component - BI Dashboard for HCM (DAS-BI-)

Session Details

*Date: **Display Facility to Learner**

Facility: 

Room: 

23. On the **Room Search** screen, click the **Search** button to display a list of all available rooms for that **Facility**.

Room Search

Search Criteria

Facility: 

Room Type: 

Room Number:

Room Name:

Building Name:

Room Status: Required Capacity:

Country:  City: State:

Show Only Available Rooms

Search Results [Customize](#) | [Find](#) | [View All](#) | [First](#) 1-5 of 5 [Last](#)

<u>Room Number</u>	<u>Room Type</u>	<u>Room Name</u>	<u>Max Occupancy</u>	<u>State</u>
BIRCH ROOM	Comp Lab	Birch Room	16 OH	
WILLOW CONFERENCE ROOM	Conference	Willow Conference Room	100 OH	
APPLE ROOM	Comp Lab	Apple Room	18 OH	
BONSAI ROOM	Comp Lab	Bonsai Room	14 OH	
WALNUT ROOM	Conference	Walnut Room	100 OH	

24. Select the room by clicking the appropriate link.

Creating an Activity - Instructor Led

25. Enter the **Start** and **End Times**.

Activity - DAS-BI-112DAS00100120130422797

Session Details

*Date: 04/22/2013 Display Facility to Learner

Facility: DAS General Services Division

Room: BONSAI ROOM

*Start Time: 8 | *End Time: 10 *Time Zone: EST

Be sure to enter *am or pm*.

[Details](#)

Instructors Customize | Find | View All | First 1 of 1 Last

Name Display *Type

Primary

26. If necessary, click the magnifying glass next to the **Instructor** field.

NOTE: If the **Activity Details** tab has a Primary Instructor designated, this instructor's name displays automatically in the **Name Display** field.

27. On the **Instructor Search** screen, click the **Search** button to display a list of all available instructors.

Instructor Search

Search Criteria

Last Name: First Name:

Vendor:

Language: Instructor Status:

Qualified Instructors

Search Results Customize | Find | View All | First 1-16 of 16 Last

Name Display	Learner ID	Status
Jeffrey Brown	279719	Active
Tricia Price	280689	Active
Sean Anthony	293113	Active
David Porter	293115	Active
DION CHARLES	293166	Active

Creating an Activity - Instructor Led

28. Select the instructor by clicking the appropriate link.

Learning Component - BI Dashboard for HCM (DAS-BI-

Session Details

*Date: Display Facility to Learner

Facility:

Room: [Details](#)

*Start Time: *End Time: *Time Zone:

Instructors		Customize Find View All <input type="button" value="📄"/>	First <input type="button" value="⏪"/> 1 of 1 <input type="button" value="⏩"/> Last
Name Display	*Type		
<input type="text" value="David Porter"/>	Primary <input type="button" value="⏴"/> <input type="button" value="⏵"/>		

Equipment			Customize Find View All <input type="button" value="📄"/>	First <input type="button" value="⏪"/> 1 of 1 <input type="button" value="⏩"/> Last
Description	Asset Tag	Serial Number		
<input type="text"/>			<input type="button" value="⏴"/> <input type="button" value="⏵"/>	

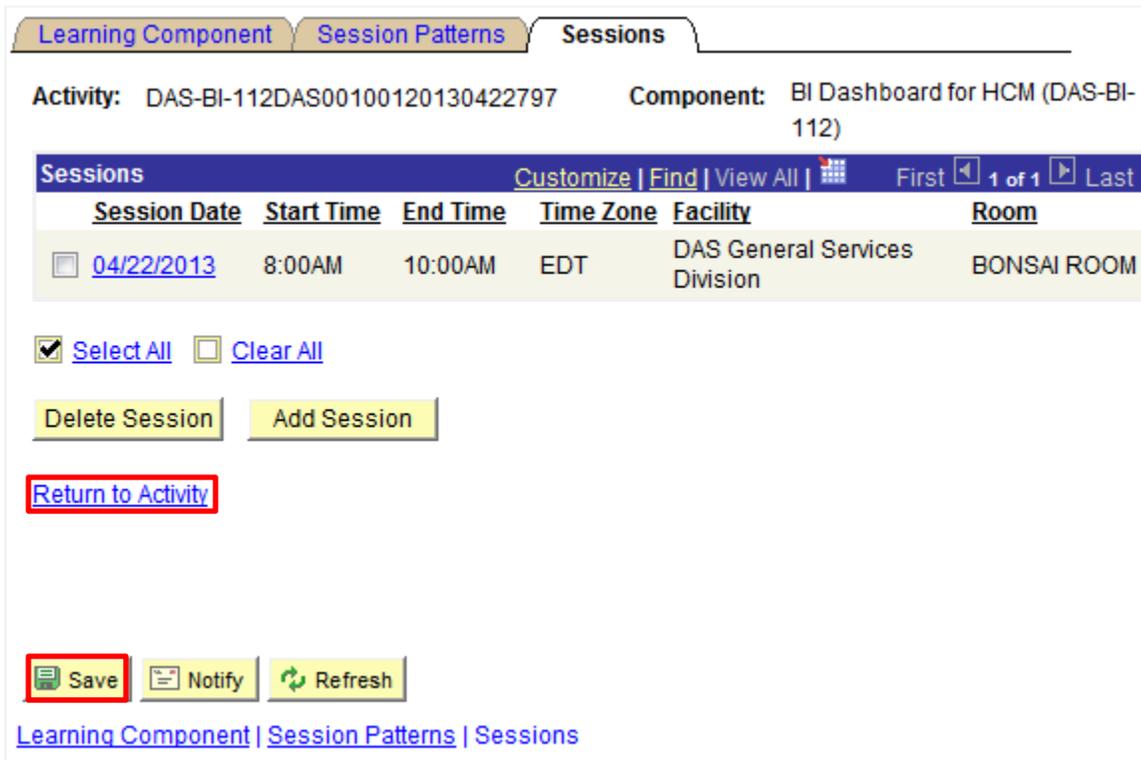
Notes:

29. Click the **Apply** button.

30. Click the **OK** button.

Creating an Activity - Instructor Led

31. The session displays on the **Sessions** tab. Verify the information is correct and click the **Save** button.



Learning Component | Session Patterns | **Sessions**

Activity: DAS-BI-112DAS00100120130422797 Component: BI Dashboard for HCM (DAS-BI-112)

Session Date	Start Time	End Time	Time Zone	Facility	Room
<input type="checkbox"/> 04/22/2013	8:00AM	10:00AM	EDT	DAS General Services Division	BONSAI ROOM

[Select All](#) [Clear All](#)

[Delete Session](#) [Add Session](#)

[Return to Activity](#)

[Save](#) [Notify](#) [Refresh](#)

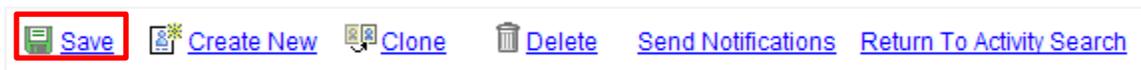
[Learning Component](#) | [Session Patterns](#) | [Sessions](#)

32. Click the **Return to Activity** link.

33. On the **Activity Details** tab, change the **Status** to **Active**.

*Status:	Active <input type="button" value="v"/>
*Language:	Active
Education Units:	Closed
Owner:	Inactive
	Pending

34. Click **Save**.



[Save](#) [Create New](#) [Clone](#) [Delete](#) [Send Notifications](#) [Return To Activity Search](#)

NOTE: The system is set up to “refresh” every hour. You will not be able to see your activity until the next refresh takes place.