ELM Tier 2 Support Resolution Matrix

Issue/Request	Where to Go/What to Check	Who Corrects the Issue or Fulfills the Request

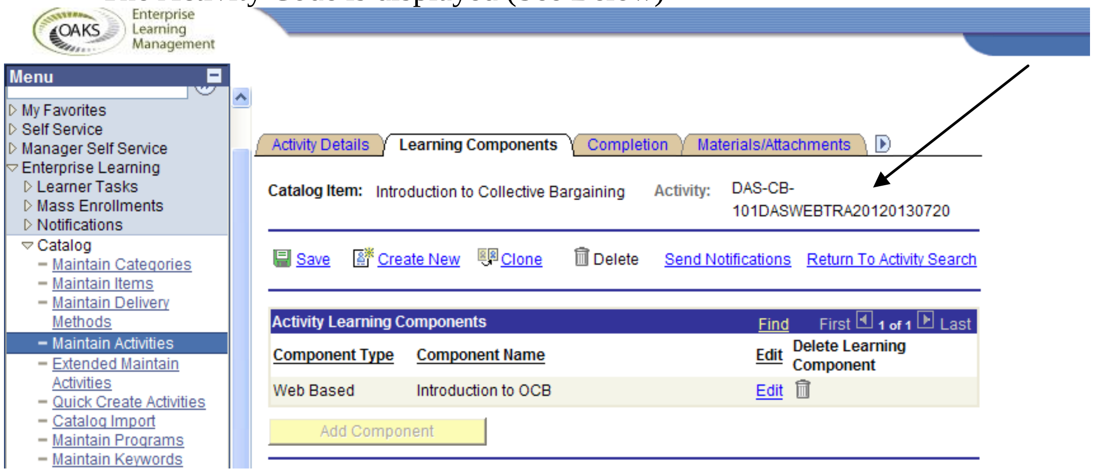
Course Question	• The following questions could be asked. Answer them to the best of your knowledge or let the user know you'll research and follow up with them:
	  ○ Who built the web content for this course?
	  ○ What tool was used to publish the web training content?
	  ○ Will this course be offered every year?
	  ○ I've already taken Ethics training; can I forgo this training and still be given credit in ELM for my Ethic training?
	    ▪ **Research this with the ELM Team and follow up with the user later.**
	  ○ **Note: Also use the ELM Web based Course FAQ document to aid end-users.**
	• **Any other issues refer case to the ELM Team**
		The Course Agency Administrator

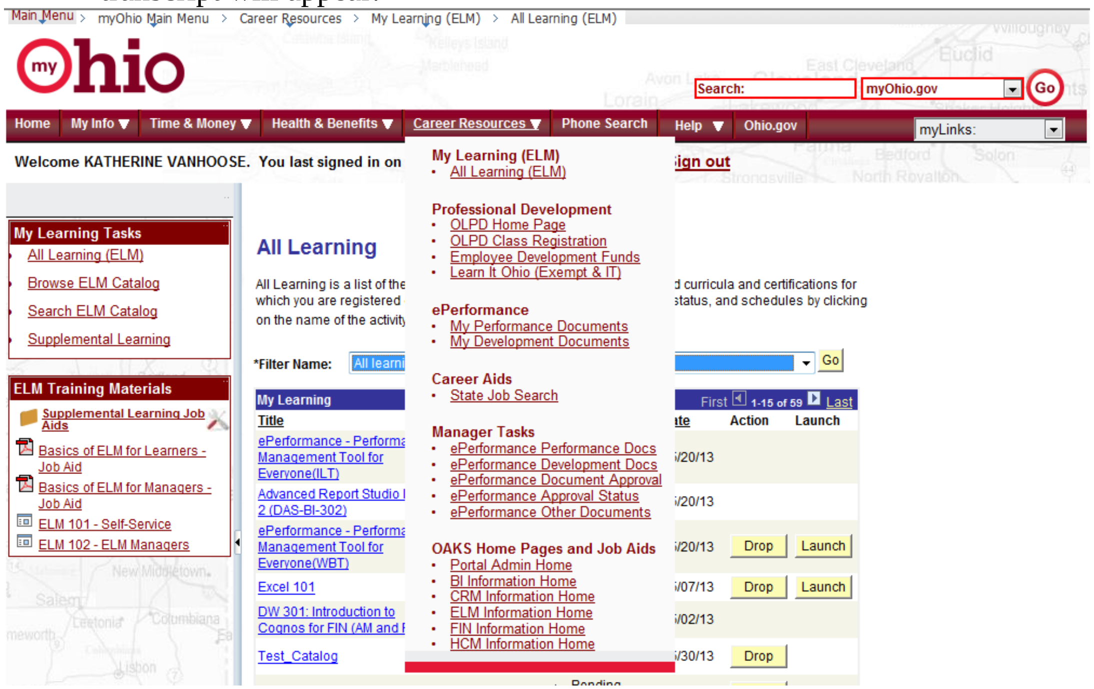
End-User Course Credit	• Navigation: **Enterprise Learning** > **Learner Tasks** > **Administer Activity Rosters** • Type in the name of the course in the **Title** field and click on the **Roster** button for the course. • Click on the **Activity Component** Link and click on the **Details** button. • Click on the **Search Options** Link and enter in the End-User First and Last Name OR just the Employee ID (State of Ohio User ID) and click the **Search** Button. • Change the dropdown field under **Attendance** to Completed. Make sure the Completion Status shows Completed and hit the **Save** Link (Top of page or bottom). ***Note: This will give the user credit for completing the course. If the attendance field shows as In-Progress, the user may have not finished the entire course.** • **Any other issues refer case to the ELM Team**	The Course Agency Administrator

View Web Course Activity Roster	• Navigation: **Enterprise Learning** > **Learner Tasks** > **Administer Activity Rosters**
	• Type in the name of the course in the **Title** field and click on the **Roster** button for the course.
	• View the Roster for the course. Learners will have a **Current Status** of either Enrolled, In-Progress, Not Completed or Completed.
	  o Enrolled – The learner is enrolled into the course.
	  o In-Progress – The learner has attempted to take the web based course but may have not come to the end of the course.
	  o Completed – The learner has completed the course and has received passing credit
	  o Not Completed – The learner has not completed the course requirements and has received failed score. **This is only if the web content has an exam the learner needs to pass.**
	• To find **individual** Learners, click on the **Search Options** Link and enter in the End-User First and Last Name OR just the **Employee ID (State of Ohio User ID)** and click the **Search** Button. The learner should appear if they were enrolled into the course at some point.
	
	• **Any other issues refer case to the ELM Team**
		The Course Agency Administrator

Enroll Learners	• Navigation: **Enterprise Learning** > **Learner Tasks** > **Enroll Learners** • Enter your First and Last name or only your Employee ID (State of Ohio User ID) as the Requester for enrollment. • Click the **Select** button for your “Select Requester” row. • Enter the name of the course in the **Title** field or use the course code (**item code**) or the **activity** code to search for the course to enroll learners into. • Click the **Enroll** button for the course needing enrollment. • Enter the employee ID (State of Ohio User ID) into the **Employee ID** field and click the **Search** button. • Check the **Select** checkbox next to the learner and click the **Continue Enrollment** button. • Then click the **Submit Enrollment** Button and the learner is enrolled into course.	The Course Agency Administrator

	• **Any other issues refer case to the ELM Team**	
Drop a Learner From Course	• Navigation: **Enterprise Learning** > **Learner Tasks** > **Administer Activity Rosters** • Type in the name of the course in the **Title** field and click on the **Roster** button for the course. • To find **individual** Learners, click on the **Search Options** Link and enter in the End-User First and Last Name OR just the **Employee ID (State of Ohio User ID)** and click the **Search** Button. The learner should appear if they were enrolled into the course at some point. • In the dropdown box under "**New Status**" select **Drop** and then click the **Drop** button on the next page. • **Any other issues refer case to the ELM Team**	The Course Agency Administrator
Approve a Learner For a Course	• Navigation: **Enterprise Learning** > **Learner Tasks** > **Administer Activity Rosters** • Type in the name of the course in the **Title** field or **Activity Code** and click on the **Roster** button for the course. • To find **individual** Learners, click on the **Search Options** Link and enter in the End-User First and Last Name OR just the **Employee ID (State of Ohio User ID)** and click the **Search** Button. The learner should appear if they were enrolled into the course at some point. • In the dropdown box under the "**New Status**" column and select **Approve** and then click the **Continue** button on the next page. • **Any other issues refer case to the ELM Team**	The Course Agency Administrator
View Course Catalog Item	• Navigation (Read Only access): **Enterprise Learning** > **Catalog** > **Maintain Items** • Enter the course code (catalog item code) or enter the course name in the Catalog Item Long Name field. • Click the **Search** button and the course will appear.	The Course Agency Administrator
Create Course Activities	• Navigation: **Enterprise Learning** > **Catalog** > **Maintain Activities** • ***Note: Follow the Create an Activity Job-Aid**	The Course Agency Administrator

Search For Activity Code	• Navigation: **Enterprise Learning** > **Catalog** > **Maintain Activities**
	• Enter the **Title or Name** of the course in the **Catalog Item** field and the Activity details page will appear for the course.
	• Click on the **Learning Components** Tab
	• The Activity Code is displayed (See Below)
	
	• 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.
	• DAS-CB-101DASWEBTRA20120130720
	  ○ DAS-CB-101 = Course Code
	  ○ DAS = Primary Learning Environment for the Activity
	  ○ WEBTRA = Facility/Room ID (Web Based Training)
	  ○ 2012 = Year
	  ○ 01 = Month
	  ○ 30 = Day
	  ○ 720 = Random Generated 3 digit #
		The Course Agency Administrator

Direct Learner to View Their Transcript to Launch Course	• Have learner sign into the myohio employee portal: [Http://myohio.gov](http://myohio.gov) • Direct them to Career Resources > All Learning (ELM) and the learner's transcript will appear.  • Have the learner click on the **Launch** button for the course that needs to be launched. They will need to click the **Launch** link on the next page to start the course. ***Note:** If the learner does not see the course from their transcript page, the course may be on another page. Have the Learner click **View All** to see all of their training.	The Course Agency Administrator

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<td>Direct Learner to Search the ELM Catalog</td>
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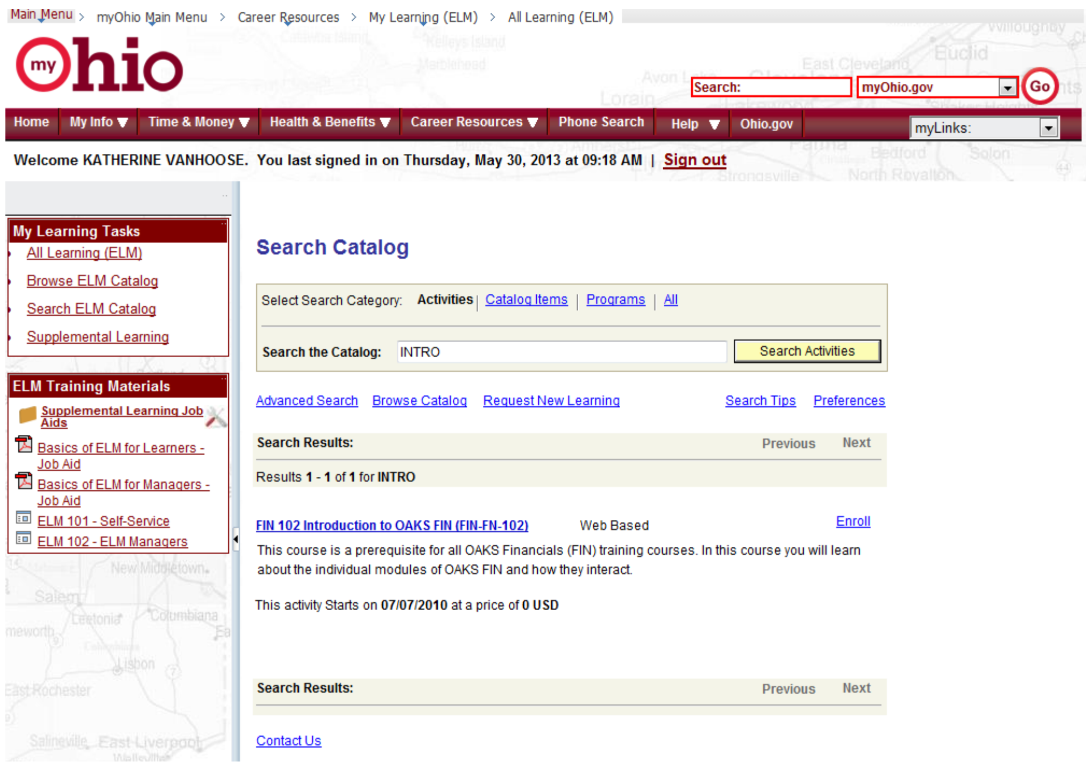
- Have learner sign into the myohio employee portal: http://myohio.gov
- Direct them to Career Resources > All Learning (ELM)> Search ELM Catalog
- Instruct the Learner to enter in the name of the course in the **SEARCH THE CATALOG** field and click the **Search Activities** button.
- Direct the learner to click the **ENROLL** link for the course they are need to enroll into. On the next page have them click **SUBMIT ENROLLMENT** button



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<td>The Course Agency Administrator</td>
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<td>How to Create a CRM Case and Assign to the ELM Team</td>
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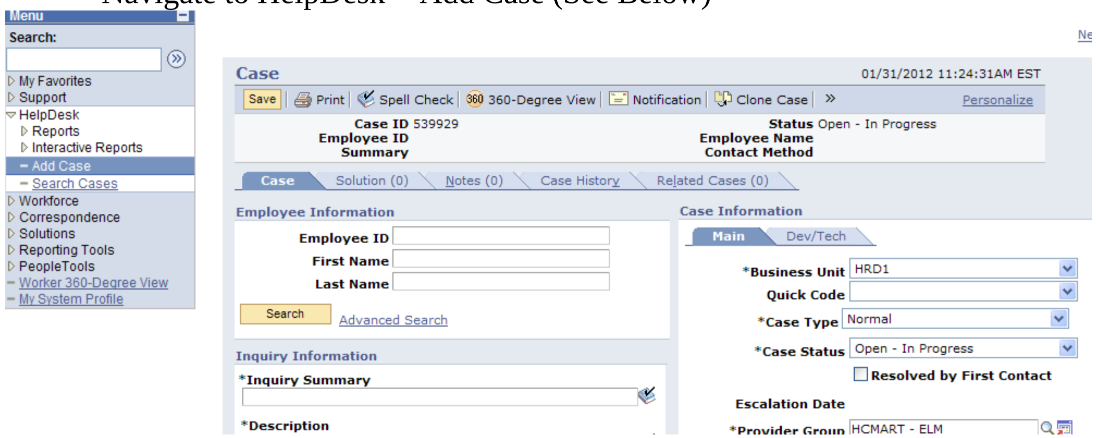
Sign into the myohio employee portal: Http://myohio.gov
Navigate to OAKS Quick Access and under Customer Relationship Mgmt click the Launch Application link
Navigate to HelpDesk > Add Case (See Below)



Enter your State of Ohio User ID in the Employee ID field and click the Search button
Enter a Title of the issue in the Inquiry Summary field and then enter the full description of the issue in the Description field.
Enter the following Case Information:

Business Unit: ELM1
Quick Code: Blank
Case Type: Normal
Case Status: Open – In Progress
Provider Group: HCMART – ELM
Assigned To: David Peebles or Katherine Vanhoose
Agency/Application: DAS ELM
Service/Module: Technical
Inquiry Type/Process: Other
Case Priority: Choose One
On Behalf Of: Agency
Impact: Choose One

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<td>The Course Agency Administrator</td>
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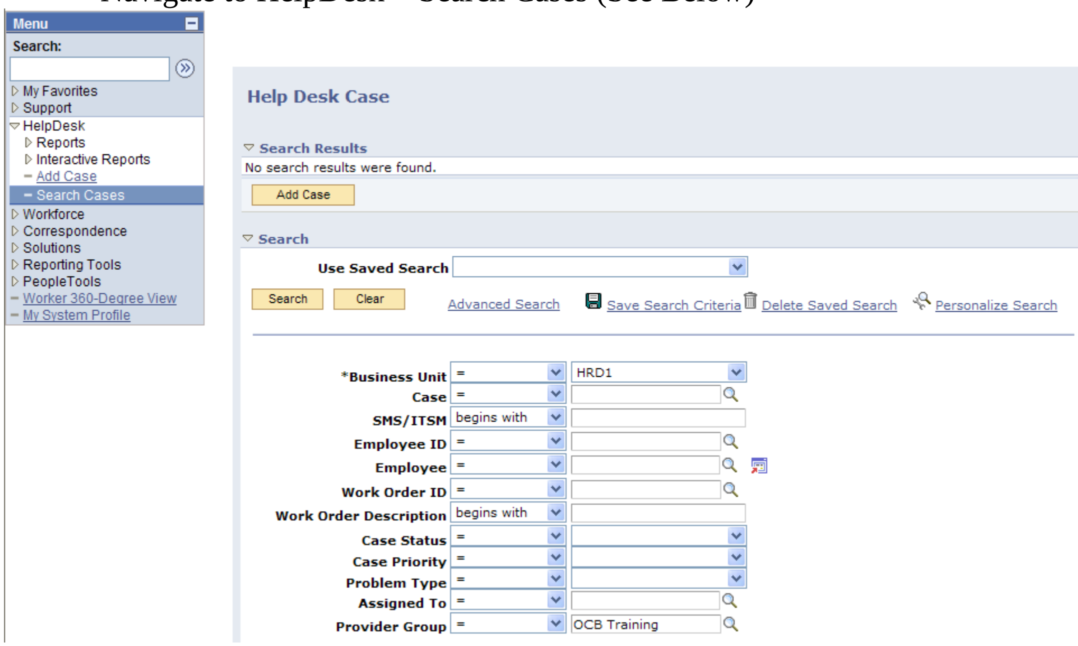
	○ Channel: **Email** • If you have any attachments click the **Notes (0)** tab and enter a subject in the **Subject** fields • Next click on the **Add an Attachment** link and **browse** for you document to attach to the CRM case. • Next click **Save Case** and the case is assigned to the ELM Team for resolution.	
How to Search for CRM CASE/Close a CRM Case with a Resolution	• Sign into the myohio employee portal: Http://myohio.gov • Navigate to OAKS Quick Access and under Customer Relationship Mgmt click the **Launch Application** link • Navigate to HelpDesk > Search Cases (See Below)  • Enter the following **Information:** ○ Business Unit = **ELM1** ○ Provider Group = ***Choose Your Provider Group*** • Next Click the **Search** button • Click on the **Case # Number** of the CRM case that has a **Open** Status to	The Course Agency Administrator

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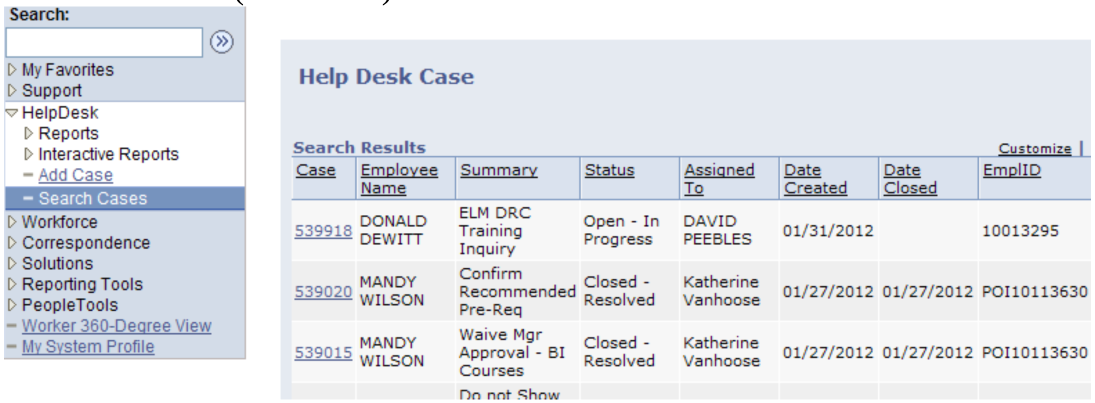
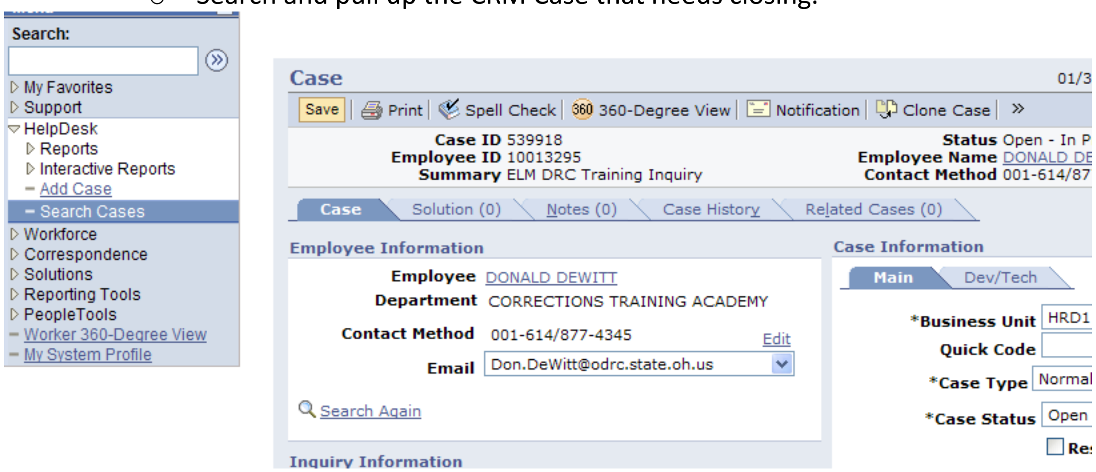
view case (See Below)



- **To Close a CRM Case do the following**:
    - Search and pull up the CRM Case that needs closing.



- Next click on the **Solution (0)** tab and enter your solution in the **Enter New Solution** field with a description of the resolution to the case.
- Click the **Solve** button
- Then click the **Save Case** button to close the case.
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<td>Run PSQuery Reports</td>
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- Navigate to Reporting Tools > Query > Query Viewer
- Enter in the name of the Query in the **Query Name** *begins with* Field (See below).
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<td>The Course Agency Administrator</td>
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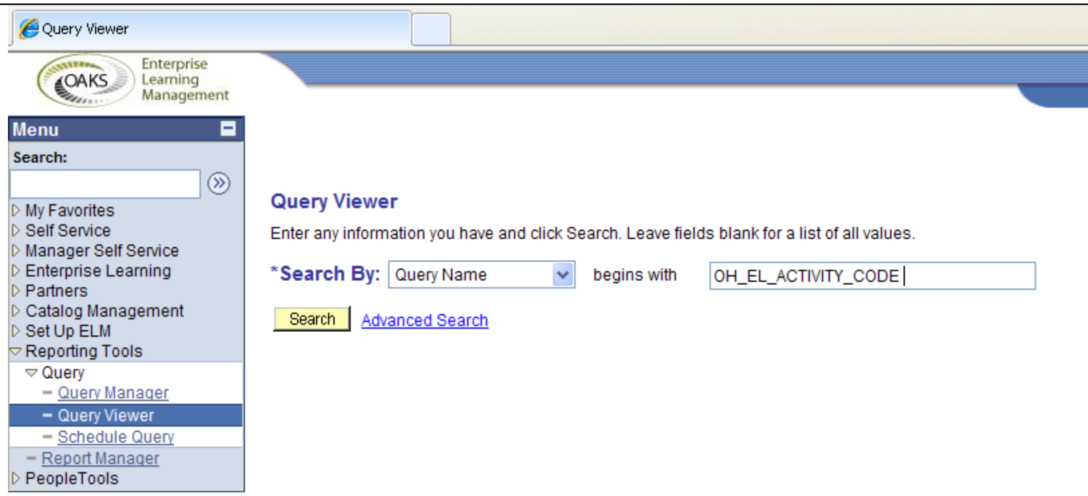
<td>

Choose to the Run to HTML or Run to Excel *Note: Ignore Schedule, you may click add to Favorites to add the query to your favorites list of reports.
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<td>ELM Glossary</td>
<td>*Note: Refer to the ELM 9.0 Learning Catalog Structure and Security Document

<u>Categories</u> – Learning Subject (ex.,Communications)
<u>Catalog Item</u> – Course Name
<u>Delivery Methods</u> – Course Delivery Method (How course is delivered to audience?)
<u>Activities</u> – Course class (course event)
<u>Learning Component</u> – Activity Learning Method (The defined learning approach for the class)
<u>Learning Environment</u> – The agency own environment for the agencies training catalog. The LE also gives the agency administrators access to catalog data. All training catalog data (catalog items, activities, facilities, etc.) for an agency will need to have the agencies LE assigned to it.
<u>Learner Group</u> – is the group of learners that will need access to search and register for the course. Every agency has their own learner group as well as special learner groups (ex., Training Officers only).
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