

## ELM Create Category Request Form Instructions

This sheet provides basic instructions for the ELM Category form input fields. Categories are logical groupings of items that enable learners and managers to easily browse and search for appropriate activities and programs. The completed form is used for requesting the creation of a category for addition to the ELM application and requires the approval of and must be submitted by the requesting Agency ELM Point of Contact. The values for all fields found on this form, including the form's drop-downs, are listed here.

Required fields are marked with an asterisk (\*). Please email [ELMsupport@ohio.gov](mailto:ELMsupport@ohio.gov) if you have any questions.

- **\*Category Long Name:** Enter desired category long name (50 character maximum - data will be cut off if exceeds the 50 character limit for the field).
  - *Example 1:* Human Resources
  - *Example 2:* Policy Training
- **\*Category Short Name:** Enter desired category name abbreviation (10 character maximum - data will be cut off if it exceeds the 10 character limit for the field).
  - *Example 1:* HR
  - *Example 2:* Policy
- **\*Status:** Select “Active” from the drop down menu to indicate the category will be available for learners to browse and search in ELM; select “Inactive” from the drop down menu to disable your category from being searchable in ELM and the category does not appear in the catalog.
- **\*Description:** Enter full description of requested category (254 character maximum - data will be cut off if it exceeds the 254 character limit for the field). *Example:* The Policy category will consist of catalog items that pertain to government policies that effect employees of the State of Ohio.
- **OAKS Employee ID:** Enter the OAKS ID of the category owner as defined below as ‘Owner’ in these instructions.
- **Owner:** Select the person who has the main responsibility for this category. Typically, this is the administrator who is responsible for updating the category. The entry here is informational only—it does not determine who can update the category.
- **\*Learning Environments:** Enter the name of the associated learning environments for which the category is valid, this will set up administrator access for a category; *there can only be one primary learning environment. Note:* The “State of Ohio” learning environment must always be listed, but does not have to be the primary learning environment. The available learning environments are as follows:
  - Administrative Services
  - Office of Budget & Mgmt
  - State of Ohio
    - **Primary:** Select “Yes” from the drop down menu for the Primary Learning Environment; select “No” from the drop down menu if not the Primary Learning Environment.
- **\*Learner Groups:** Specify the learner groups and give learners that are members of the specified learner group(s) access to the category item when browsing or searching the catalog. Learner groups are defined groups of learners that share some of the same learner attributes, such as the same department, region, or job code. You can select from the learner groups that have been defined for any of the learning environments associated with the category item. (**Important!** Associate a category with at least one learner group, if you do not select a learner group, learners cannot access this category).
  - *Example 1:* Office of Budget & Mgmt LG designates members of the Office of Budget & Mgmt Learner Group access to the category
  - *Example 2:* Job and Family Services LG designates members of the Job and Family Services Learner Group access to the category
  - *Example 3:* Dept of Agriculture LG designates members of the Department of Agriculture Learner Group access to the category

- **Display Order:** Enter the sequence (ex. 1, 2, 3, etc.) in which this subcategory is to be listed on the catalog browse page relative to other categories that you select here.
  
- **Child Category:** Enter the name(s) of any related subcategories to the requested category.
  - *Example 1:* Human Resources (parent category)
    - Benefits (child category)
    - Recruitment (child category)
    - Leadership & Management (child category)