

## ELM Create Learner Group Request Form Instructions

This sheet provides basic instructions for the ELM Learner Group form input fields. Learner groups are defined groups of learners that share some of the same learner attributes, such as the same department, region, or job code. Use Learner Groups to specify the categories, catalog items, activities, and programs a learner can access through the catalog. The completed form is used for requesting the creation of a learner group to be added 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.

### **Learner Group**

- **\*Group Name:** Enter desired learner group name (50 character maximum - data will be cut off if it exceeds the 50 character limit for the field).
  - *Example 1:* Bureau of Workers Compensation Learner Group
  - *Example 2:* Office of Budget and Management Trainers Learner Group
- **\*Short Description:** Enter desired learner group name abbreviation (10 character maximum - data will be cut off if it exceeds the 10 character limit for the field).
  - *Example 1:* BWC
  - *Example 2:* OBM
- **\*Group Status:** Select "Active" from the drop down menu to indicate the learner group is ready for use and will be available for learners to be assigned to in ELM; select "Inactive" from the drop down menu to indicate that a learner group is unavailable or no longer active for learners in ELM.
- **Owner:** Select the person who has the main responsibility for this learner group. Typically, this is the administrator who is responsible for maintaining the learner group. The entry here is informational only—it does not determine who can update the learner group.
- **Automatically Maintain Membership:** Select "Yes" or "No" from drop-down menu. If "Yes" is selected, group membership will be updated automatically and you will be unable to add or delete members manually; this selection allows for ELM to automatically update the learner groups based on changes from HCM.

### **PSQUERY Criteria**

- **Department ID:** Groups Learners by Department ID, (example: DASXXXXX) as set up in HCM
- **Job Code:** Groups Learners by Job Code (example: 63331) as set up in HCM
- **Bargaining Unit:** Groups Learners by Bargaining Unit (example: Exempt or NonExempt) as set up in HCM
- **Report To Position Structure:** Groups Learners by Report to Position Structure (example: 2000XXXX) as set up in HCM

## Group Criteria

- **\*Criteria Type:** Select the attribute(s) that users must have to belong to a learner group from the eight criteria listed types, “Business Unit”, “Customer”, “Department”, “Department Hierarchy”, “Job Code”, “Learner”, “Learning Environment”, “Region” in the drop-down menu. Select “Department Hierarchy” to signify that learners in all departments that are subordinate to the selected department are to be included in the learner group.
- **\*Operation:** Select from the following operators listed in the drop-down menu to indicate the type of comparison to be made for group criteria:
  - < Less than.
  - <= Less than or equal to.
  - <> Not equal to.
  - = Equal to.
  - > Greater than.
  - >= Greater than or equal to.
- **\*Criteria Value:** Enter the appropriate designation that corresponds to the selected criteria type for the attributes that a learner must have to be included in a learner group (15 characters maximum - data will be the cut off if it exceeds the 15 character limit for the field). *Note: Criteria Value is used to determine what department, business unit or learner you want to be in the learner group.*
  - *Example 1:* Attorney General “Business Unit” has a “Criteria Value” defined as ATYGN
  - *Example 2:* Human Resources “Department” has a “Criteria Value” defined as HUMAN RESOURCE
  - *Example 3:* Internal “Learner” has a “Criteria Value” defined as Alex Smith
- **And/Or:** Select “And” or “Or” from the drop-down menu to define the relationships between multiple criteria if applicable.
  - *Example 1:* To include in a learner group of all members who are in the Human Resources (HR) AND Finance (FIN) Departments, you would do the following:
    - From the “1. Criteria Type” drop-down menu select “Department”
    - From the “Operation” drop-down menu select “=”
    - Enter the “Criteria Value” “Human Resources” (type in text field)
    - From the “Operation” drop-down menu select “AND”
  
    - From the “2. Criteria Type” drop-down menu select “Department”
    - From the “Operation” drop-down menu select “=”
    - Enter the “Criteria Value” “Finance” (type in text field)
    - Your resulting criteria would look like: Department = Human Resources AND Department = Finance
  - *Example 2:* To include in the learner groups of all members of the Attorney General Business Unit who are in the Attorney General office or Human Resources Department, you would do the following:
    - From the “1. Criteria Type” drop-down menu select “Business Unit”
    - From the “Operation” drop-down menu select “=”
    - Enter the “Criteria Value” “Attorney General” (type in text field)
    - From the “Operation” drop-down menu select “OR”
  
    - From the “2. Criteria Type” drop-down menu select “Department”
    - From the “Operation” drop-down menu select “=”
    - Enter the “Criteria Value” “Human Resources” (type in text field)
    - Your resulting criteria would look like: Business Unit = Attorney General OR Department = Human Resources
  - *Example 3:* To include in the learner group a Learner of the Attorney General Business Unit who are in the Human Resources or Finance Departments, you would do the following:
    - From the “1. Criteria Type” drop-down menu select “Learner”
    - From the “Operation” drop-down menu select “=”

Enter the "Criteria Value" "Alex Smith" (type in text field)  
From the "Operation" drop-down menu select "AND"

From the "2. Criteria Type" drop-down menu select "Department"  
From the "Operation" drop-down menu select "="  
Enter the "Criteria Value" "Human Resources" (type in text field)  
From the "Operation" drop-down menu select "OR"

From the "3. Criteria Type" drop-down menu select "Department"  
From the "Operation" drop-down menu select "="  
Enter the "Criteria Value" "Finance" (type in text field)

- Your resulting criteria would look like: Learner = Alex Smith AND (Department = Human Resources OR Department = Finance).

➤ **Additional Group Criteria:** Enter any additional group criteria, remarks, values or comments here related to the learner group.