

ELM Security Access Request Form

This sheet provides basic instructions for the ELM Security form input fields. The completed form is used for requesting security access to and setting up a functional profile in the ELM application and requires the approval of and submission 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 if you have any questions.

Security Access Tab – Gives users security access to ELM

***1. Employee Information**

- ***Employee Name:** Enter the first name and last name of employee needing security access.
- ***OAKS Employee ID:** Enter the OAKS ID of the employee needing security access.
- ***Agency Name:** Enter the name of the agency to which the employee needing security access belongs.
 - *Example 1:* DAS
 - *Example 1:* OBM
- **Employee Phone Number:** Enter the work phone number for the employee needing security access.
 - *Example 1:* 614-466-6767
- **Employee Email Address:** Enter the work email address for the employee needing security access.
- ***User Setup:** Place an "X" in the appropriate box to indicate the type of user, only one box can be checked (contain an "X")
 - New User: Check if employee is a new user to the ELM system
 - Update Existing User: Check if employee already exists in the ELM system.
 - Disable User in System: Check if the employee needs to be disabled in the ELM system.

***2. Supervisor who is requesting security access for end user**

- ***Name:** Enter the name of the supervisor who is requesting the security access for the employee.
- ***Phone Number:** Enter the phone number of the supervisor who is requesting the security access for the employee.
 - *Example 1:* 614-466-6767

***3. Authorized Agency ELM Point of Contact (POC) signature**

- ***Name of ELM POC:** Enter the name of the designated authorized agency ELM point of contact. The POC is the main ELM contact person that will submit the security form for you. Every agency will have a ELM Point of Contact person.
- ***Date:** Enter the date the form was signed by the ELM POC.

*4. Reason for Access

- ***Reason for Access:** Enter reason(s) this user needs security access and fully describe the task(s) that will be performed with this ELM access by the user.
 - *Example 1:* A new user to ELM
 - *Example 2:* User will be performing Agency Administration tasks in ELM

*5. Role Access

- ***Role Access:** Place an “X” in the appropriate box “Add/Change” or “Delete” to indicate the type of security access requested for employee:
 - OH_ELM_AGENCY_ADMINISTRATOR
 - Create Activities
 - Create Programs
 - Enroll Learners
 - Maintain Rosters
 - Run queries/reports
 - View categories, facilities, equipment, items, and delivery methods
 - OH_ELM_EXTERNAL_LEARNER
 - View/Enroll and take learning
 - Track their own learning status
 - Change learning preferences
 - Maintain personal information
 - OH_ELM_INSTRUCTOR
 - Maintain Rosters
 - View training schedules
 - Run sign-in sheets
 - Mark attendance
 - OH_ELM_SUPER_ADMINISTRATOR
 - Create Activities
 - Create Programs
 - Enroll Learners
 - Maintain Rosters
 - Run and create queries
 - Run reports
 - Maintain categories, facilities, equipment, items, and delivery methods
 - Super Admin has access to system default values, setup ELM menu, and ELM configuration items
 - Create and maintain Learners Groups
 - OH_ELM_ELM_ADMINISTRATOR
 - Create Activities
 - Create Programs
 - Enroll Learners
 - Maintain Rosters
 - Run and create queries
 - Run reports
 - Maintain categories, facilities, equipment, items, and delivery methods
 - Create and maintain Learner Groups
 - OH_RUN_QUERY
 - Run queries/reports

Note: Completing sections 1-3 on the Security Access tab will automatically populate related fields in sections 1-3 on the Functional Profile Tab of this form. You must go to the Functional Profile tab of this form and complete all of the fields that are required to set up the Functional Profile you are requesting.

Functional Profile Tab – Gives users ELM navigation access to ELM, this allows the user to maneuver through ELM.

***1. Employee Information**

- ***Employee Name:** Enter the name of employee needing the functional profile access.
- ***OAKS Employee ID:** Enter the OAKS ID of the employee needing functional profile access.
- ***Agency Name:** Enter the name of the agency to which the employee needing functional profile access belongs.
 - *Example 1: DAS*
- **Employee Phone Number:** Enter the work phone number for the employee needing security access.
 - *Example 1614-466-6868*
- **Employee Email Address:** Enter the work email address for the employee needing security access.
- ***User Setup:** Place an “X” in the appropriate box to indicate the type of user, only one box can be checked (contain an “X”)
 - New User: Check if employee is a new user to the ELM system.
 - Update Existing User: Check if employee already exists in the ELM system.
 - Disable User in System: Check if the employee needs to be disabled in the ELM system.

***2. Supervisor who is requesting security access for end user**

- ***Supervisor Name:** Enter the name of supervisor who is requesting the security access for the employee.
- ***Supervisor Phone Number:** Enter the phone number of supervisor who is requesting the security access for the employee.
 - *Example 1: 614-466-6565*

***3. Authorized Agency ELM Point of Contact (POC) signature**

- ***Name of ELM POC:** Enter the name of the designated authorized agency ELM point of contact.
- ***Date:** Enter date the form was signed by the ELM POC.

***4. Functional profile details - mark the appropriate action and fields for each profile needed (Note: These fields should automatically populate when security access section is completed, please review for accuracy).**

- **ELM Administrator Profile:** Place an “X” in this box to indicate the user requires this type of administrator access.

- **Agency:** Enter agencies (learning environments) for which the user needs administrative access to.
- **Primary Agency:** Enter which agency (learning environment) is the primary agency requesting access.
- **ELM Instructor Profile:** Place an “X” in this box to indicate the user requires this type of instructor access.
- **Instructor Type:** Select “Internal” (**State Employee**) or “External” (**Non-State Employee**) from the drop-down menu to indicate if the instructor is internal or external to the organization.
- ***Status:** Select “Active” if instructor is available to teach an activity in ELM or “Inactive” to indicate if the instructor is not available in ELM.
- **Instructor Notes:** Enter any notes or comments associated with this instructor profile in ELM.

Catalog Item

- **Catalog Item Long Name:** Enter the long name(s) of a catalog item(s) the instructor is qualified to teach in ELM.
- **Course Code:** Enter the course code(s) of a catalog item(s) the instructor is qualified to teach in ELM.
- **Description:** Enter description of catalog item(s) the instructor is qualified to teach in ELM.
- **Teacher Preferences:** Place an “X” in the appropriate box “Monday”, “Tuesday”, “Wednesday”, “Thursday”, “Friday”, “Saturday” and/or “Sunday” to indicate days instructor prefers to teach in ELM.
- **Preferred Delivery Method:** Select “Instructor Led”, “Blended Learning”, “Web Based”, “Assignment”, “Test”, and “Survey” from the drop-down menu if the instructor has a preferred delivery method for ELM.
- **Attached File:** Select “Yes” to indicate if there are any files associated with this instructor, select “No” if not submitting any attachments related to this instructor. *Example:* Certifications.
- **Agency (Learning Environments):** List any agencies the instructor should be available for in ELM. *Note:* Once an agency is added, that agency cannot be removed from the instructor preferences.

ELM External Learner: Place an “X” in this box to indicate the user requires external learner access. An external learner is not a state employee.

- **Learning Environment:** Enter the learning environment that will be assigned to the external learner.
- **Learner Name:** Enter the first name and last name of the external learner.
- **Type of Name:** Select “Degree”, “Father”, “Former 1”, “Former 2”, “Legal”, “Maiden”, “Mother”, “Other”, “Preferred”, “Primary” as appropriate from the drop-down menu.
- **Effective Date:** Enter the date the external learner profile will become effective in ELM.
- **Gender:** Select “Male” or “Female” to indicate the appropriate gender for the external learner from the drop-down menu.

- **Preferred Communication:** Select “Email”, “Postal Mail”, “Telephone” the method the external learner prefers for ELM related communication from the drop-down menu.
- **Address:** Enter the external learner’s complete work address.
- **Language Code:** Enter the external learner’s preferred language in ELM.
- **Email:** Enter the external learner’s work email address.
- **Phone Number:** Enter the external learner’s work phone number.
 - *Example 1:* 614-466-6969
- **Job Effective Date:** Enter the external learner’s start date with the organization.
- **Learner Status:** Select “Active” from the drop-down menu to indicate if the external learner the currently available and able to utilize ELM; select or “Inactive” if the external learner the currently not available and unable to utilize ELM.
- **Job Title:** Enter the external learner’s job title.
- **Additional Information:** Enter any additional information that you may want to convey about the external learner related to ELM. *Example:* Legally blind.