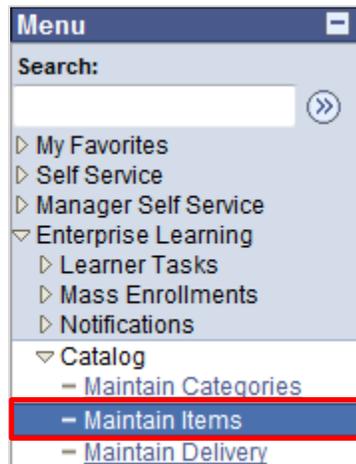


# Creating a Catalog Item

Within ELM, a catalog item contains general information about a training topic, including a course code, description and delivery method. The catalog item is displayed in the ELM course catalog. Catalog items are also referred to as courses. In OAKS ELM, navigate to **Enterprise Learning >Catalog > Maintain Items**.



1. The **Maintain Items** page appears. Click the **Add a New Value** tab.

### Maintain Items

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

Course Code: begins with

Catalog Item Long Name: begins with

Catalog Item Short Name: begins with

Include History  Correct History  Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

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

# Creating a Catalog Item

2. Fill in the following required fields within the *Item Details* tab:

Item Details
Attributes

Save
Create New
Delete
Send Notifications

**Catalog Item Basic Data**

Basic Data
Prerequisites
Equivalents
Notes and Attachments

\*Catalog Item Long Name:

\*Catalog Item Short Name:

\*Course Code:

Owner:

\*Catalog Item Status:

\*Effective Date:

\*Description:

Catalog Item Abstract:

\*Approval Type:

\*Offering:  Internal  External

\*Education Units:  \*Education Type:

Cost:  Currency Code:

Enable Learning Request

Request Threshold:

Prerequisites
Equivalents
Notes and Attachments
Security

Save
Create New
Delete
Send Notifications
Return to Catalog

Enter the **Catalog Item Short Name**.

Enter the **Catalog Item Status**.

Enter the **Education Units**. Number of units the item is worth.

Enter the **Education Type**, Identifies the training type (CEU, CLE, CME, CNE, CPE, MEU, PDU, Training or None)

Enter the **Catalog Item Long Name**. Begin all catalog items with your 3 character agency identifier. (30 characters or less)

Enter the **Course Code**. Use the following naming convention: 3 character agency identifier, 2 character abbreviation of the course and a 3 digit number.

The **Effective Date** will most likely be the creation date of the item.

\*4000 characters.

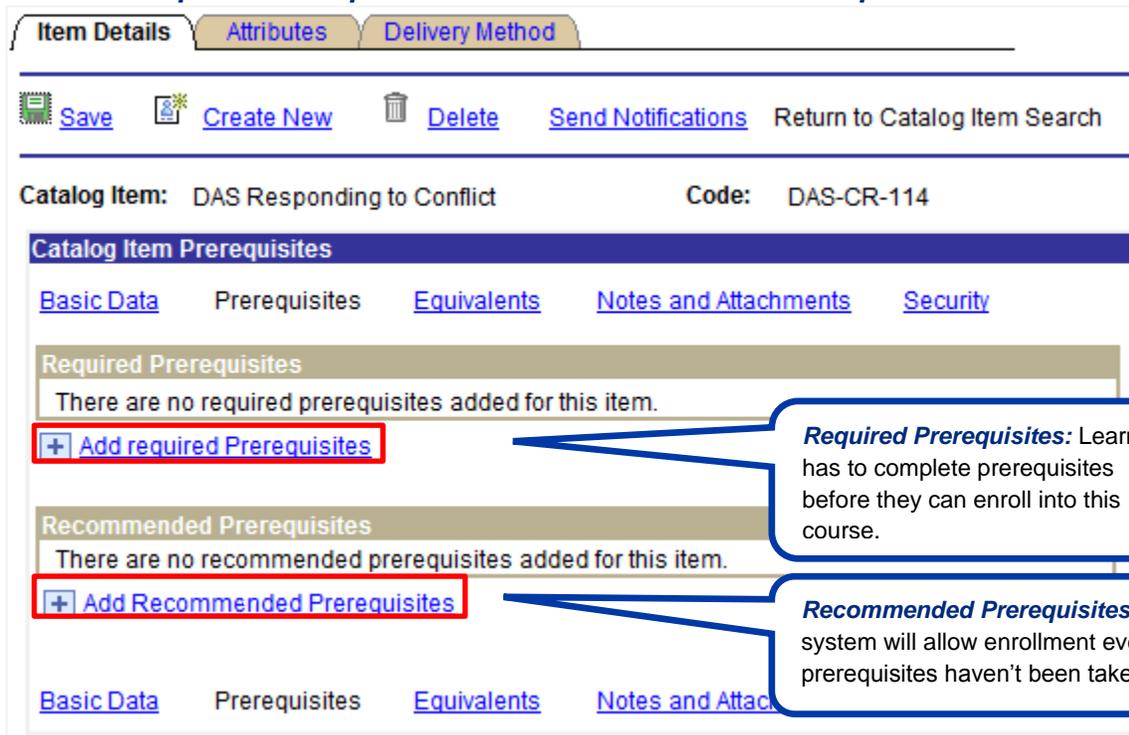
Enter the **Description**. This is visible to learners as part of the course catalog. \*250 characters.

Enter the **Approval Type**. Identifies if an approval is required for the item.

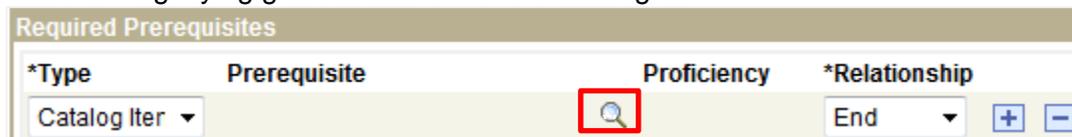
- None
- Internal Mgr – External None (Approval required by immediate supervisor)
- Internal Special – External None (Approval required by someone other than immediate supervisor)

# Creating a Catalog Item

3. Uncheck **Enable Learning Request** check box.  **Enable Learning Request**
4. Enter 0 into the **Learning Request Threshold** field. **Learning Request Threshold:**
5. Click **Save**.  [Save](#)
6. Click **Prerequisites** link. [Prerequisites](#). (Optional)  
Prerequisites are used to identify courses that are required or recommended to be taken prior to this catalog item. Follow the steps below to add prerequisites.
7. Click **Add required Prerequisites** or **Add Recommended Prerequisites**.



8. Use the magnifying glass to search for the catalog item.



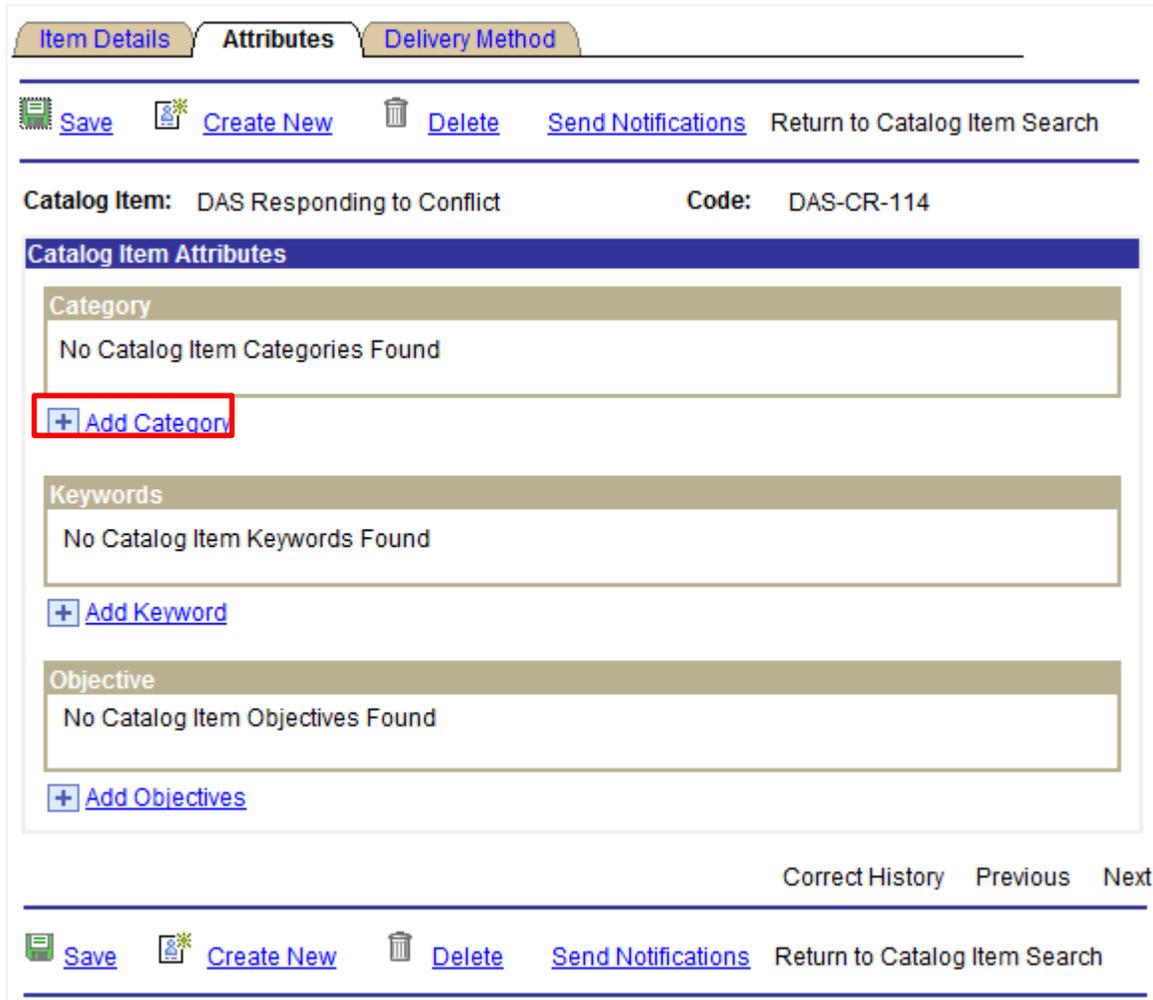
9. Click **Done**  once all prerequisite items have been added.

Multiple prerequisite relationship must be set to "or".

# Creating a Catalog Item

- Click **Attributes** tab. Attributes

Attributes are used to identify which category within the catalog you would like the catalog item displayed.



Item Details **Attributes** Delivery Method

Save Create New Delete Send Notifications Return to Catalog Item Search

Catalog Item: DAS Responding to Conflict Code: DAS-CR-114

**Catalog Item Attributes**

Category  
No Catalog Item Categories Found  
**+ Add Category**

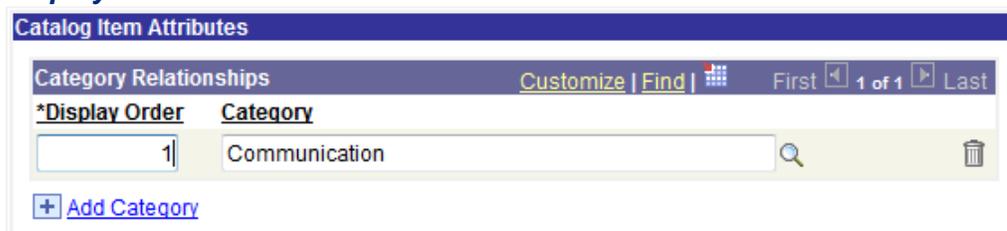
Keywords  
No Catalog Item Keywords Found  
**+ Add Keyword**

Objective  
No Catalog Item Objectives Found  
**+ Add Objectives**

Correct History Previous Next

Save Create New Delete Send Notifications Return to Catalog Item Search

- Click **Add Category**.
- The **Category Relationships** section appears. Click the magnifying glass icon, a list of categories for your agency will display. Select the desired category and indicate the **Display Order**.



**Catalog Item Attributes**

Category Relationships Customize | Find | First 1 of 1 Last

*Display Order	Category
1	Communication

**+ Add Category**

The order of all catalog items can be viewed by browsing the catalog or by running a BI report.

# Creating a Catalog Item

*Note: The display order is the order ranking of how the catalog item will be displayed under the category you selected for the catalog item. If there are multiple catalog items with the same display order (e.g., 1) within the same category, ELM will randomly display the catalog item under the category on the Browse Catalog page. See example screen shot below.*

## Browse Catalog

[Learning Catalog](#)>>[OAKS](#)>>[Financials](#)>>[Accounts Receivable](#)

Courses related to customer deposits and pending items

### Catalog Items

---

[AR 201 Customer Maintenance \(FIN-AR-201\)](#) [Select](#)

This course is designed to give you the knowledge and skills to manage customer information in OAKS, including the creation and maintenance of customer contact information.

[AR 200 Accounts Receivable for External Customers \(FIN-AR-200\)](#) [Select](#)

This course is designed to give you the knowledge and skills to enter and maintain receivables and post deposits to customer accounts.

[AR 305 Monthly Document Clean Up Information Session \(FIN-AR-305\)](#) [Select](#)

This session provides instruction on resolving errors in pending Accounts Receivable transactions and to establish monthly AR clean-up procedures.

[Learning Catalog](#)>>[OAKS](#)>>[Financials](#)>>[Accounts Receivable](#)

13. Click **Save**  [Save](#) .
14. Click **Item Details** tab  .
15. Click **Security** link [Security](#) .
16. Under **Learning Environment**, your agency's learning environment will always be displayed as the default and marked as the **Primary**. All agencies must also add the **State of Ohio** learning environment.

# Creating a Catalog Item

Item Details | **Attributes** | Delivery Method

Save Create New Delete Send Notifications Return to Catalog Item Search

Catalog Item: DAS Responding to Conflict Code: DAS-CR-114

**Security**

Basic Data Prerequisites **Equivalents** Notes and Attachments Security

Learning Environment Customize | Find | First 1 of 1 Last

**Learning Environment** Primary

Administrative Services  **+**

Learner Groups

No Learner Group has been defined.

**+** Add Learner Group Security

Basic Data Prerequisites Equivalents Notes and Attachments Security

Correct History Previous Next

Save Create New Delete Send Notifications Return to Catalog Item Search

17. To add the State of Ohio learning environment, click **+** and then use the magnifying glass to bring up a list of learning environments and select State of Ohio. Repeat this step if additional learning environments are needed.

Learning Environment	Short Name
<a href="#">Administrative Services</a>	DAS
<a href="#">Office of Budget &amp; Mgmt</a>	OBM
<b><a href="#">State of Ohio</a></b>	SOO
<a href="#">Dept. of Rehab &amp; Correction</a>	DRC

18. Click **Save**  Save .
19. Under **Learner Groups**, click **Add Learner Group Security** to add the specific learner Groups that you would like to have access to the Catalog Item.

**+** [Add Learner Group Security](#)

20. Use the magnifying glass to search for learner group to be added.

Learner Groups Customize | Find | First 1 of 1 Last

Name Learning Environment Status \*Relationship

# Creating a Catalog Item

21. Enter your 3 character agency identifier within the Learner Group Description and click **Look Up**. This will help narrow your search. Select the Learner Group.

Learner Group ID: =

Learner Group Description: begins with

Group Status: =

Learning Environment: begins with

Look Up Clear Cancel [Basic Lookup](#)

Learner Groups				Customize	Find	First	1 of 1	Last
Name	Learning Environment	Status	*Relationship					
DAS SANS SECURE THE HUI	State of Ohio	Active	or					

*Note: Within the Relationship field, Always use **or** when adding multiple learner groups. The last entry should always be **end**. If you only have one group, there is no need to use **end**.*

22. Click **Done**  when finished adding learner groups.
23. Click the **Delivery Method** tab .
24. Click the **Add New Delivery Method** button.

Item Details Attributes **Delivery Method**

[Send Notifications](#) [Return to Catalog Item Search](#)

Catalog Item: Regional Hearing Officer Training Code: OIC-RH-001

Catalog Item Delivery Options		Customize	Find	First	1 of 1	Last
Delivery Method	Status					
<input type="button" value="Add New Delivery Method"/>						

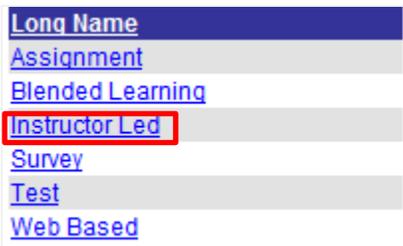
# Creating a Catalog Item

25. Within the **Delivery Method** tab click the magnifying glass to select the **Delivery Method** for the catalog item.

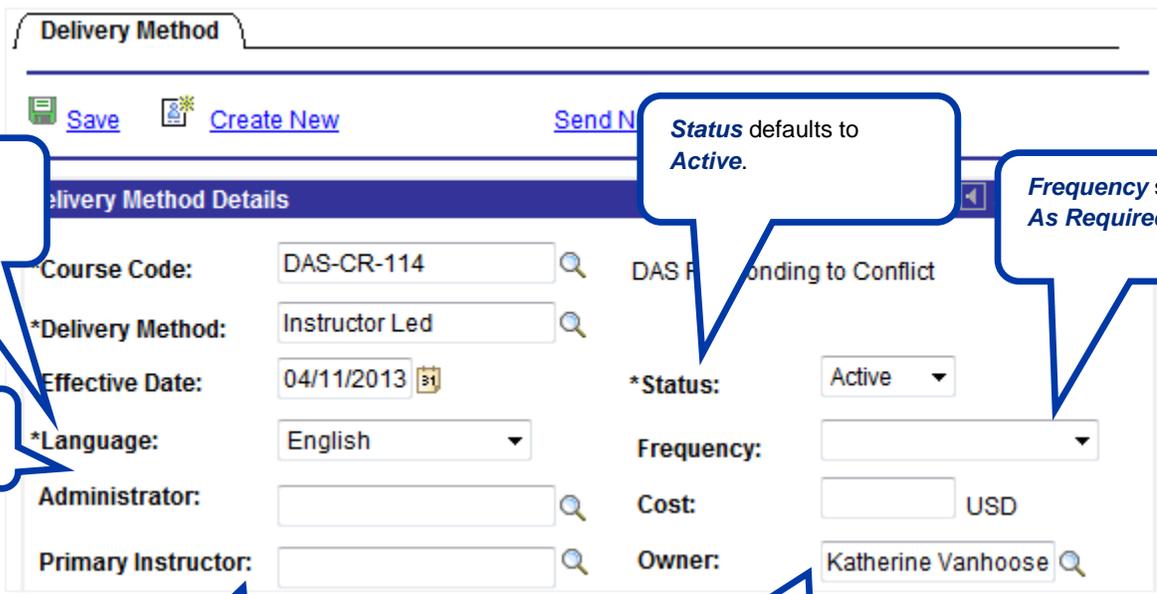
The most common delivery methods are Assignment, Blended Learning, Instructor Led, and Web Based. Below is a table that defines each of them.

Delivery Method	Definition
Assignment	Web-based learning that can have up to three links to ELM hosted content or external urls. Assignments can be set up to allow the Learner, Learner & Manager or Administrator to set completion.
Blended Learning	A combination of any two Activity Components that must both be complete, in order for the learner to receive completion.
Instructor Led	Learning that has a location, time and date associated with the activity.
Web Based	Learning that can be completed from a learner's computer. Does not have a specific time or date associated with the activity.

26. Select **Instructor Led** for instructor led catalog items.



27. Verify and change as necessary the following fields:



**Delivery Method**

Save Create New Send N

**Delivery Method Details**

Course Code: DAS-CR-114 DAS F...onding to Conflict

\*Delivery Method: Instructor Led

Effective Date: 04/11/2013

\*Language: English

Administrator: [ ]

Primary Instructor: [ ]

\*Status: Active

Frequency: [ ]

Cost: [ ] USD

Owner: Katherine Vanhooose

**Language** defaults to **English**.

**Administrator** is optional.

**Status** defaults to **Active**.

**Frequency** should be **As Required**.

**Primary Instructor** is optional.

**Owner** identifies the owner of the catalog item. This needs to be entered. The default is the name of the person entering the item.

# Creating a Catalog Item

28. **Pricing, Training Units and Estimated Cost** sections remain blank. Payments are not being utilized by ELM at this time.

Payments		
<b>Pricing</b>		
*Currency Code:	USD	
Internal Price:	0.00	
Internal Drop Charge:	0.00	
External Price:	0.00	
External Drop Charge:	0.00	
<b>Training Units</b>		
Price:	0.000	
Drop Charge:	0.000	
<b>Estimated Cost</b>		
Currency Code: USD	Estimated Cost:	Hourly Cost:

The fields in the remaining sections can be filled in as necessary, if you have the information for the item. This same information will be available to update when you create your activities associated to the catalog item.

29. **Learning Period** and **Published Duration** are mainly used for web-based items. The **Learning Period** will give learners a defined time period to take the course. If the learner has not taken the course during the set number of days, the learner will not be able to take the course.

Learning Period			
Learning Period:	Days	Warning Period Days:	Days
Published Duration			
Days:	Hours:	Minutes:	

**Learning Period** starts from the date learner is enrolled into courses optional.

**Warning Period Days** is when to send warning to learner to complete training.

# Creating a Catalog Item

30. Use the **Enrollment** section to set Max and Min Enrollments for this catalog item. **Max Enrollment** is the amount of seats available for the session. **Min Enrollment** is the number of seats that need to be filled in order to conduct the class. When using the enrollment features, make sure to check the **Enforce Enrollment Limit** checkbox.

Enrollment	
<b>Max Enrollment:</b>	<input type="text"/>
<b>Min Enrollment:</b>	<input type="text"/>
<b>Average Fill Rate:</b>	<input type="text"/>
<input type="checkbox"/> <b>Enforce Enrollment Limit</b>	

31. Use the **Waitlist** section to enable and set parameters around wait listing learners. If a session is full this feature will put additional learners who wish to enroll in the session on a waitlist and track the information for you. Select the **Enable Waitlist** checkbox to turn this feature on for this catalog item.

Waitlist	
<input checked="" type="checkbox"/> <b>Enable Waitlist</b>	
<b>Waitlist Capacity:</b>	<input type="text"/>
<b>Waitlist Threshold:</b>	<input type="text"/>

**Waitlist threshold** indicates number on waitlist that should be met when they system notifies the Administrator that the number has been met.

32. Use the **Grades and Attendance** section to stream instructor led and web-based course.

Use **Auto mark Completion** only for instructor led courses to automatically mark enrolled learners complete for a session. Enter the number of days after the end date that you would like the system to automatically mark learners complete in the **Mark Completion After** field.

For web-based courses it is best practice to leave **Launchable from History** and **Allow Completion from History** selected. This allows learners to access and complete courses from their history.

Grades and Attendance	
<input type="checkbox"/> <b>Auto Mark Completion</b>	<b>Mark Completion After:</b> <input type="text"/> Days
<input checked="" type="checkbox"/> <b>Launchable from History</b>	<input checked="" type="checkbox"/> <b>Allow Completion from History</b>

33. Click **Save**  [Save](#) .