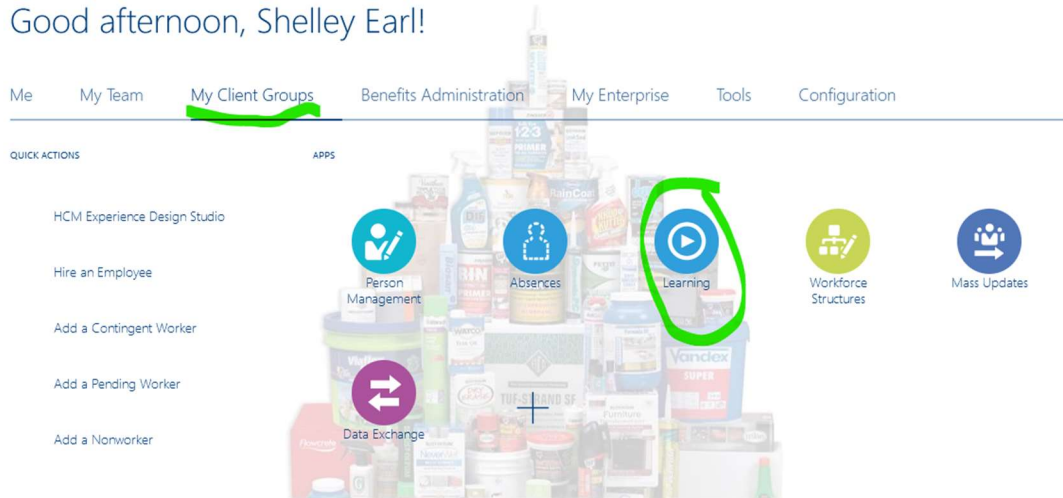
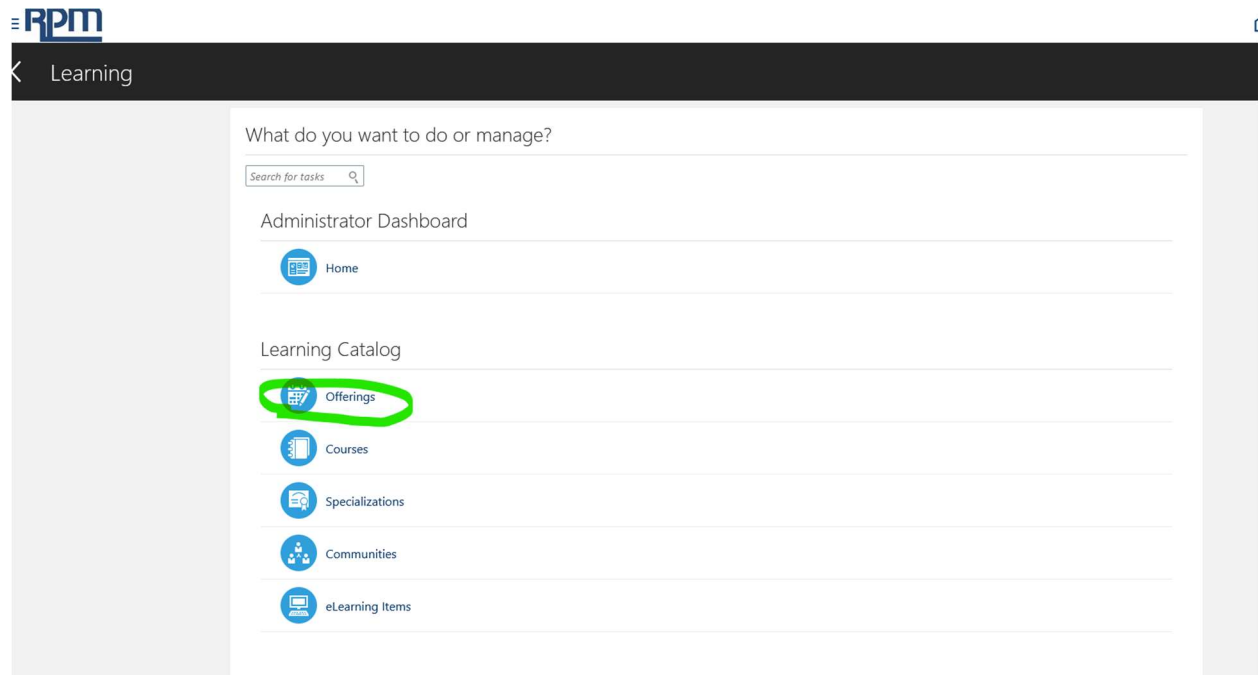


How to Guide - Enrolling and completing employees for Toolbox Talks in Oracle

Step 1: Select My Client Groups – Learning:



Step 2: Select Offerings in the Learning Catalog:



Step 3: In the Search Criteria – type 'TBT' into the offering title as per below screenshot and change the year to 2000 in the publish start date and search:

The screenshot shows the RPM Offerings search interface. The search criteria are set to 'Offering Title' containing 'TBT' and 'Publish Start Date' on or after '05/09/2000'. The search results table shows one entry: Offering Number OLC589090, Offering Title RPM - TBT Workplace Harassment, Course Title RPM - TBT Workplace Harassment, and Publish Start Date 11/05/2021.

Step 4: Once search is complete it will bring up a list of available courses/offerings, click on the offering title as highlighted below:

The screenshot shows the RPM Offerings search interface, identical to the previous one, but with a green circle highlighting the 'Offering Title' column in the search results table.

Step 5: You can access the supporting materials on this page, the Tool box talk poster and script:

The screenshot shows the RPM - TBT Workplace Harassment offering details page. The page shows various details including Offering Number, Offering Dates, Primary Classroom, and Published Dates. The 'Related Materials' section is expanded, showing an attachment 'Workplace Harassment Poster TB (1 more...)' with a 'View' button highlighted by a green circle.

Step 6: Select the Learners option on the left hand side of the screen as per below:

RPM - TBT Workplace Harassment
Instructor-Led Offering

Offering Number: OLC589090
Offering Dates: 11/05/2021 - 11/05/2022
Language: American English
Offering Type: Instructor-Led
Primary Classroom: No Location Defined
Evaluation: None
Published Dates: 11/05/2021 -

Description
RPM Compliance Tool Box Talks Workplace Harassment

Capacity Rules
Booked Seats: 0
Capacity Rules: Not Enabled

Additional Attributes

Activities

Comments
 Enable conversations for active and completed enrollees on the enrollment page

Related Materials

| Visibility | Attachment | |
|---------------------------------|--|----------------------|
| Administrators | Workplace Harassment Poster TB (1 more...) | View |
| Administrators and Self-Service | None | View |
| Administrators and Enrollees | None | View |

Step 7: Select add learners and click on required assignment:

RPM - TBT Workplace Harassment
Instructor-Led Offering

Access | Access Groups | **Learning Assignments** | Learning Initiatives

Search Learners Advanced Saved Search S

Match: All Any

** Name: ** Assignment Status: Not Started
** Person Keyword: ** Initiative Name:

Learner Results

View Format **Add Learners** Change Status Edit Assignment Manage Activities More Actions Mass Action

Voluntary Assignment
Required Assignment

| Name | Sta | Person Number | Primary Email | Location | Business Unit | Coun Manager |
|---------------------|-----|---------------|---------------|----------|---------------|--------------|
| No data to display. | | | | | | |
| Columns Hidden: 21 | | | | | | |

Step 8: Add name of the assignment – we would suggest your company name followed by the course name and the date of training, this can be copied for description and note sections. Assign as – select from the dropdown box the most fitting for your role, due date can be the next working day available on the calendar:

1 — 2 — 3
Enrollment Details | Select Learners | Advanced Rules

Require Learning

Next Cancel

*Name RPM HQ TBT Workplace Harassment 11/05/2021

Assignment Profile Number OLC1936396

Description RPM HQ TBT Workplace Harassment 11/05/2021

*Start date 11/05/2021

*Assign RPM - TBT Workplace Harassment

*Assign As Compliance

*With this note RPM HQ TBT Workplace Harassment 11/05/2021 - live training completed
56 characters left

*Due Date 11/08/2021

Step 9: In the require learning section at the bottom, select the + option on administrators:

Require Learning

Next Cancel

*Assign As Compliance

*With this note RPM HQ TBT Workplace Harassment 11/05/2021 - live training completed
56 characters left

*Due Date 11/08/2021

Learning Request Details

Start on or After mm/dd/yyyy

Complete By mm/dd/yyyy

Purchase Order Number

Justification

Context Segment

Related Materials

| Visibility | Attachment |
|------------------------------|------------|
| Administrators and Enrollees | None + |
| Administrators | None + |

Step 10: Attach a copy of your TBT sign in attendance sheets from your employees by browsing out to your folders and selecting the training records, this will support the audit trail of the training. You can add multiple documents as needed, just select the + button to add additional:

Require Learning [Next] [Cancel]

*Name: RPM HQ TBT Workplace Harassment 11/05/2021
 Assignment Profile Number: OLC1936396
 Description: RPM HQ TBT Workplace Harassment 11/05/2021

Attachments [X]

Actions ▾ View ▾ [+] [X]

| Type | * File Name or URL | Title | Description | Attached By | Attached Date |
|--------|--|----------------------------|-------------|--------------|-----------------|
| File ▾ | Browse... No file selected. | | | Shelley Earl | 11/05/2021 3:04 |
| File ▾ | TBT employee list 11052021.csv [Update...] | TBT employee list 11052021 | | Shelley Earl | 11/05/2021 3:04 |

Rows Selected 1 Columns Hidden 1 [OK] [Cancel]

Due Date: 11/08/2021

Step 11: Select Next:

Require Learning [Next] [Cancel]

1 — 2 — 3
 Enrollment Details Select Learners Advanced Rules

*Name: RPM HQ TBT Workplace Harassment 11/05/2021
 Assignment Profile Number: OLC1936396
 Description: RPM HQ TBT Workplace Harassment 11/05/2021

Employees can be added via either adding a person individually or by using a person number list – please see below:

Option 1 – Individually adding a person: Type the person’s name or Employee ID number in the ‘Add a person’ box, when you select them they will appear in the list below:

Select Learners [Back] [Next] [Cancel]

View ▾ [Add ▾] Add a Person [Type the name of a person you want to add] [Remove] [Edit]

| Name | Selection Method | Person Number | Learning Item Number Prompt Value | Department |
|---------------|------------------|---------------|-----------------------------------|-----------------|
| Caroline Cain | Individual | [REDACTED] | | Recharge Flowcr |
| Shelley Earl | Individual | [REDACTED] | | Legal |

Once you have your list of people for the training select Next:

Enrollment Details | Select Learners | Advanced Rules

Select Learners

Back | Next | Cancel

View ▾ Add ▾ Add a Person Remove Edit

| Name | Selection Method | Person Number | Learning Item Number Prompt Value | Department |
|---------------|------------------|-----------------------|-----------------------------------|-----------------|
| Caroline Cain | Individual | XXXXXXXXXX | | Recharge Flowcr |
| Shelley Earl | Individual | XXXXXXXXXX | | Legal |

Columns Hidden 9

Advanced rules stay as per below and select submit:

Enrollment Details | Select Learners | Advanced Rules

Advanced Rules

Back | Submit | Cancel

Initial Assignment Status: Active ▾

Learning Item As-of Date: Latest ▾

You should receive the below message once submitted:

Information

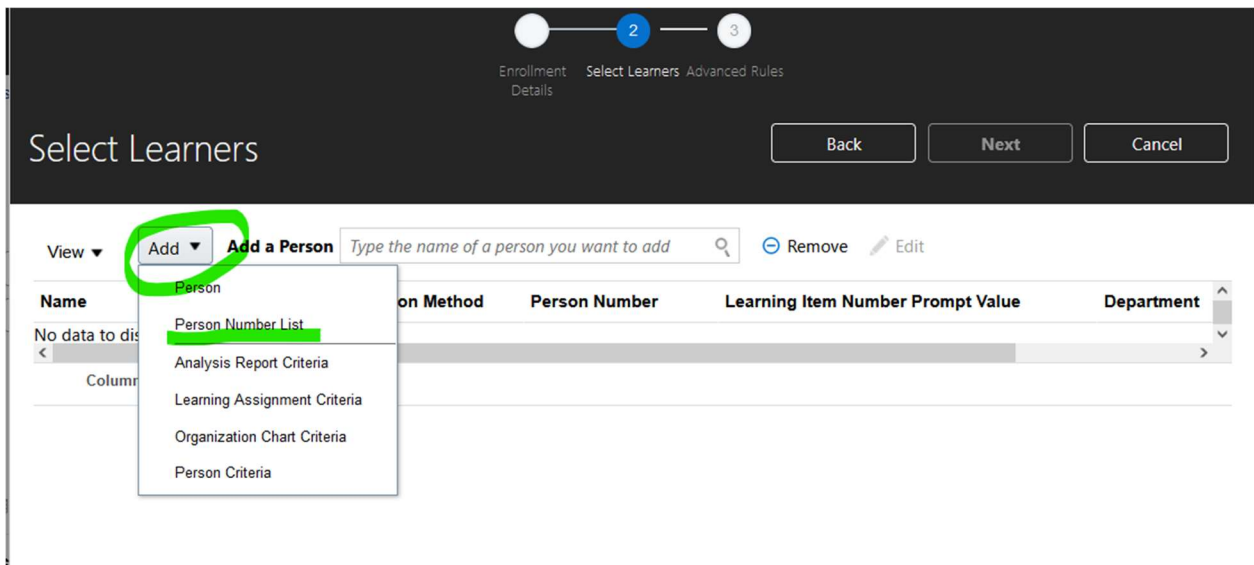
The learning assignments are created and processed for all the selected users.

OK

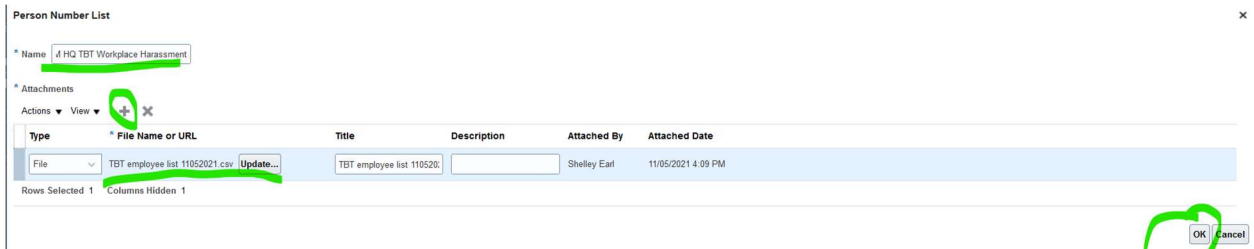
Option 2 – Person Number list. This option allows for bulk uploading of employees. Employee numbers should be included in a CSV file with just the first column including the employee number, that is the only data that is needed, example below:

| | A | B |
|---|--------|---|
| 1 | 485600 | |
| 2 | 468590 | |
| 3 | 65189 | |
| 4 | 759624 | |
| 5 | 362468 | |
| 6 | 5666 | |
| 7 | 859241 | |
| 8 | 26130 | |
| 9 | | |

In Select Learners – select the Add button and choose Person Number List:



Add the name of your training list, click on the + and browse out for you CSV. Person number list – once loaded select OK



Select Next:

Enrollment Details | **Select Learners** | Advanced Rules

Select Learners

Back | **Next** | Cancel

View ▾ | Add ▾ | **Add a Person** | | Remove | Edit

| Name | Selection Method | Person Number | Learning Item Number Prompt Value | Department |
|---------------------------------|--------------------|---------------|-----------------------------------|------------|
| RPM HQ TBT Workplace Harassment | Person Number List | | | |

Columns Hidden 9

Advanced rules stay as per below and select submit:

Enrollment Details | Select Learners | **Advanced Rules**

Advanced Rules

Back | **Submit** | Cancel

Initial Assignment Status:

Learning Item As-of Date:

You should receive the below message once submitted:

ng In

Information

The learning assignments will be processed soon for the selected users.

OK

** Initiative Name

Your employees are now enrolled on the course – you just need to mark them as complete, to do this follow the instructions below:

To get to Learners in the offering follow Steps 1-6 above:

Once in Learners, you will see a list of the employees you enrolled, if you have previously added and marked employees complete on the course and you have 'Assignment status' set to 'all' it will bring results for all employees, not just the ones you have enrolled, you can change the 'Assignment Status' to not started or search for your employees by business unit or enrolled date by selecting the advanced search option:

RPM - TBT Workplace Harassment
Instructor-Led Offering

Access | Access Groups | **Learning Assignments** | Learning Initiatives

Search Learners Advanced

Match All Any

** Name ** Assignment Status

** Person Keyword ** Initiative Name

Learner Results

View Format Add Learners Change Status Edit Assignment Manage Activities More Actions Mass Action

| Name | Status | Initiative Name | Progress | Person Number | Primary Email | Location | Business Unit | Coun |
|--------------|-------------|-----------------|----------|---------------|------------------|----------------|---------------|------|
| Shelley Earl | Not Started | | 0 / 1 | | searl@rpminc.com | Corporate H... | RPM Corp | US |

Rows Selected 1 Columns Hidden 21

Once you have the employees you need to mark complete in your list, select them, if there are multiple you can select multiple by using the 'shift' or 'ctrl' options on your keyboard – once selected select Mass Action and Mark Activities Complete

Learner Results

View Format Add Learners Change Status Edit Assignment Manage Activities More Actions Mass Action

| Name | Status | Initiative Name | Progress | Person Number | Primary Email | Business Unit | Coun Manager | Assignm Date | Completion Date |
|--------------|-------------|-----------------|----------|---------------|------------------|---------------|-----------------|--------------|-----------------|
| Shelley Earl | Not Started | | 0 / 1 | | searl@rpminc.com | | US Edward Moore | 11/05/... | |

Rows Selected 1 Columns Hidden 21

Mass Action

- Activate Assignment
- Send Alert
- Bypass and Approve
- Bypass and Reject
- Mark Activities Complete

Add submission notes stating course and completion date and ensure start date is the training date, then select next:

1 — 2
Basic Information Action Details

Mark Activities Complete

Next Cancel

Records to Use Use the 1 selected records
 Use all 1 results of the search criteria

Submission Notes TBT Completed on 11/05/2021

*Start date 11/05/2021 8:30 PM

Select the activity – there should only be one option available:

Basic Information — 2 Action Details

Action Details

Previous Submit Cancel

Scope of Bulk Action

Select Activities RPM TBT Workplace Harassment

RPM TBT Workplace Harassment

Then wait until the Instructor led activity details populate on the screen, set completion date to the date of the TBT, effort should stay as expected effort. Select 'Completed offline and status verified' in the last box – the select Submit, this will mark your employees selected as complete:

The screenshot shows the 'Action Details' form with the following elements and annotations:

- Progress Indicators:** A progress bar at the top shows 'Basic Information' as the first step and 'Action Details' as the second step, which is currently active and highlighted with a blue circle containing the number '2'.
- Navigation Buttons:** Three buttons are located at the top right: 'Previous', 'Submit', and 'Cancel'. The 'Submit' button is circled in green, and a green arrow points to it from the right.
- Scope of Bulk Action:** A dropdown menu labeled 'Select Activities' is set to 'Workplace Harassment'.
- Instructor-Led Activity Completion Configuration:**
 - Completion Date:** A dropdown menu is set to 'Specify Date'. A green arrow points to this dropdown from the right.
 - Set Completion Date To:** A date input field contains '11/05/2021', which is underlined in green. To its right is a calendar icon and the text '(UTC+00:00) Coordinated Universal Time (UTC)'.
 - Mark Actual Effort As:** A dropdown menu is set to 'Expected Effort'.
 - Instructor Led On-Site:** A dropdown menu is set to 'ed offline and status verified'. A dropdown menu is open below it, showing the following options:
 - Exempted - completed elsewhere
 - Exempted - higher level certification attained
 - Completed offline and status verified (highlighted in blue and underlined in green)
 - No Show - Learner was not present