

TITLE: Enterprise Configurations

NUMBER: 08-005

EFFECTIVE DATE: June 1, 2008

VERSION: 5.0

APPROVED: E-LMS Advisory Council

Updated: June 23, 2010

PURPOSE:

Due to the fact that some of the configuration options available within the iLearnOregon impact all domains within the system, controls need to be put in place in order to minimize those impacts to other domains. This protocol describes the configuration options that will be maintained at the Enterprise level.

APPLICABILITY:

All agencies that have an agency domain within the iLearnOregon.

FORMS:

iLearnOregon Change Request Form

REFERENCES:

- iLearnOregon Change Management Protocol Number 08-001
- Meridian Global Administration Guide

DEFINITIONS:

Approval Paths: Allows an authorized user to select which approval path will be used when a user requests access to a piece of content. Approval paths are assigned to content so that when users request access to content, the request is approved or denied by the users within the approval path.

Domain: A domain is a section(s) of the server which allows each agency to define access privileges to a customized version of the iLearnOregon.

Survey Scales: Survey scales are the options available that a user may choose from when taking a survey. The survey scale options that are available are the same for site, content, or course surveys.

PROTOCOL:

I. Access Approval

Allows an authorized user to select which approval path will be used when a user requests access to a piece of content. Approval paths are assigned to content so that when users request access to content, the request is approved or denied by the users within the approval path.

Approval paths are based on the system and automatic roles assigned to a user. Any user who has 1 or more of the system or automatic roles assigned to them may be responsible for approving access requests. All approval paths will be linear and only have 1 approver. The following approval paths will be available in every domain:

- Access Approver
- Content Owner
- Content Manager
- Course Manager
- Instructor
- Manager

II. Categories

A set list of root categories has been determined in order to maintain consistency as well as the integrity of the enterprise reporting needs. Agencies can request for the addition of sub-categories in order to meet their business needs. Each agency domain is required to associate all of its content items to the root categories as applicable.

There are 6 root categories:

1. **Workforce Development:** refers to any activity which teaches, enhances, or strengthens an employee's ability to handle themselves at work and how to relate with their customers and peers. It also refers to technical skills required for maintaining a specific career path. It relates to content that will enable an employee to keep current with changing technology and practices in their profession.
2. **New Employee:** refers to required training to assist new employees with the skills needed to be successful in his/her current role.
3. **End-User Computer:** refers to any training/content related to using computer applications.
4. **Safety, Health, and Wellness:** refers to any training/content that is intended to improve employee health, safety, and well being in the workplace.
5. **Management Development:** refers to any training/content that enhances managers, and supervisor's ability to plan, organize, lead, and control the organization and its members.
6. **Non-State:** refers to any training/content that is intended for non-state employees.

III. Certification Types

Certification Types are a listing of certifications and licenses that an authorized body, either a governmental or non-governmental organization, evaluates and recognizes an individual as meeting pre-determined requirements or criteria. Often involves standardized testing. Due to the number of certification types, please refer to the document titled State of Oregon Certifications in iLearnOregon.

IV. **Credit Types**

A credit type indicates the kind of credit a user receives for a personal learning event.

The following credit types will be available within every domain:

- **Continuing Education Unit:** A CEU is 10 contact hours of participation in an organized continuing education experience under responsible sponsorship, capable direction, and qualified instruction. The International Association for Continuing Education and Training (IACET) is the founder and guardian of the CEU and determines the criteria for awarding CEUs.
- **College Credit:** Is given by a college or university signifying that the recipient has satisfactorily completed a course.
- **Continuing Professional Education**
- **Other**

V. **Domains**

A domain is a portal into the system that has unique branding, specified users, a unique menu structure, and specific configuration settings. As part of the central system, domains share a single code base, single database, shared content repository and central user collection. Each agency has a core domain that can be configured to meet the agency's business requirements.

In order to maintain consistency as well as the integrity of the system, agencies must not add any domains or sub-domains to the system or change the agency skin. The agency domain administrator can request those changes by following the Change Management protocol (08-001). The agency domain administrator will be able to manage all other configurations options available in the domain console for their agency domain(s).

VI. **Emails**

All system emails are automatically pushed optional into all domains. For an agency to manage the emails, they will need to copy the pushed email and then make the pushed email inactive. Then the agency can make any changes to the copied email.

Due to the fact that emails are not tied to a course, there are 5 classroom course emails that cannot be modified unless approved by DAS – HRSD.

The emails are:

- Classroom Course: User enrolled in classroom course section (batch enrollment)
- Classroom Course: User enrollment cancelled (batch enrollment)
- Classroom Course: User enrollment in course section (automatically from waitlist)
- Classroom Course: User enrollment in course section (self enrollment)
- Classroom Course: User enrollment in course section cancelled (self cancellation)

Additionally, given that some emails are scheduled to be sent as part of a profile, the following emails can only be managed at the CORE domain. These emails will not be copied into the agency domains.

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- Required Training: Required training deadline notification
- Required Training: Training assignment is cancelled for a user, job title, role, or organization.
- Required Training: User failed to complete a training assignment by the end of the training period
- Required Training: User is added to a role, organization, or job title and inherits a required training assignment with no deadline.
- Required Training: User is added to a role, organization, or job title and inherits a required training assignment with no deadline.
- Required Training: User is added to a role, organization, or job title and inherits assigned training with a deadline.
- Required Training: User is assigned recurring or non-recurring training with a deadline
- Required Training: User is given required training assignment without start/deadline date.
- Required Training: User is removed from an organization, role, or job title with a training assignment, which is cancelled
- Certification: System determines that certification is going to expire in X days.
- Access Approval: User's classroom course section request expires

VII. *Training Facility Options*

There are 3 Training Facility options available: facility type, room type, and equipment type. For each option the following types will be available in every domain:

- **Facility Types:**

- | | | |
|-------------------------------------|---|---|
| <input type="radio"/> State Office | <input type="radio"/> Federal Office | <input type="radio"/> University/School |
| <input type="radio"/> County Office | <input type="radio"/> Public/Private Business | <input type="radio"/> Hotel/Conference Center |
| <input type="radio"/> City Office | <input type="radio"/> Library | <input type="radio"/> Other |

- **Equipment Types:**

- | | | |
|---|--|--|
| <input type="radio"/> Blu-Ray DVD Player | <input type="radio"/> Interpretive Phone | <input type="radio"/> Student Computers |
| <input type="radio"/> Chalkboard | <input type="radio"/> LCD Projector | <input type="radio"/> TV Digital |
| <input type="radio"/> Conference Phone | <input type="radio"/> Microphone | <input type="radio"/> TV High Definition |
| <input type="radio"/> Document Camera | <input type="radio"/> Overhead Projector | <input type="radio"/> TV Standard |
| <input type="radio"/> DVD | <input type="radio"/> Podium | <input type="radio"/> VCR |
| <input type="radio"/> Easel Stand | <input type="radio"/> Polygon Phone | <input type="radio"/> Video Conferencing |
| <input type="radio"/> Flipchart Pads | <input type="radio"/> Printer | <input type="radio"/> Whiteboard |
| <input type="radio"/> HD DVD Player | <input type="radio"/> Projection Screen | <input type="radio"/> Wireless Internet Connection |
| <input type="radio"/> Headset | <input type="radio"/> Smartboard | <input type="radio"/> Wireless Microphone |
| <input type="radio"/> Instructor Computer | <input type="radio"/> Sound System | |
| <input type="radio"/> Internet/Lan Connection | <input type="radio"/> Standard Phone | |

- **Room Types:**

- | | | |
|---------------------------------------|----------------------------------|---|
| <input type="radio"/> Classroom | <input type="radio"/> Conference | <input type="radio"/> Reception |
| <input type="radio"/> Cluster | <input type="radio"/> Boardroom | <input type="radio"/> Computer Lab |
| <input type="radio"/> Crescent Rounds | <input type="radio"/> Theater | <input type="radio"/> Other |
| <input type="radio"/> U-Shape | <input type="radio"/> Banquet | <input type="radio"/> Virtual Classroom |

VIII. *Job Titles*

Job Titles are imported from the State's Position and Personnel Data Base (PPDB). DAS – HRSD Classification and Compensation unit is responsible for the development and maintenance of all job classifications for state employees. Due to the number of job classifications, please refer to the DAS – HRSD web site for a current listing <http://www.oregon.gov/cgi-bin/ccrt.cgi?pg=ccrt>.

IX. *Evaluation Scales*

Evaluation Scales are used in performance evaluations. When you create an evaluation component (in which to group evaluation items), you select a scale for the component. The scale is used as a scoring tool to rate the user on items within the component when the performance evaluation is being completed.

The following scales will be available in every domain:

- Exceeds to Does Not Meet Expectations
- Unsatisfactory to Exceptional

X. *Evaluation Types*

Evaluation Types is where authorized users create, edit and delete evaluation types. When a user (an employee or manager) starts a new evaluation, the user must select the evaluation type that applies to the evaluation. The evaluation types display as options on Performance Evaluation forms.

The following scales will be available in every domain:

- 6-Month Performance Evaluation
- 12-Month Performance Evaluation
- Trial Service Evaluation

XI. *Learning Event Types*

Learning Event Types are associated with personal learning events. The following types will be available in every domain:

- **College Course:** Courses offered by an accredited educational institution.
- **Conference:** A comprehensive program (usually multi-day) which includes any number of workshops, seminars, courses, or classes.
- **Course:** Any number or variations of individual learning content, for a particular subject matter. May include sections and classes.
- **Internship:** A short-term opportunity where a person gains supervised practical experience in a particular area of interest or occupation.
- **Job Rotation:** Job rotation is a work change by mutual agreement wherein the employee takes on a new role for some period of time agreed to in advance by the parties. Such arrangements are intended to be for the benefit of all of the parties involved.
- **Job Shadow:** A person follows an employee at an organization for one or more days to learn about a particular occupation or industry.
- **On The Job Training (OJT):** On-the-job training takes place in a normal working situation, using the actual

tools, equipment, documents, or materials that trainees will use when fully trained.

- **On-Line Training:** Computer-based instruction that enables learners to complete training through self-paced and self-directed modules.
- **Podcast:** A series of digital-media files, which are distributed over the Internet using syndication feeds for playback on portable media players and computers. The term podcast, like broadcast, can refer either to the series of content itself or to the method by which it is syndicated; the latter is also called podcasting.
- **Retreat:** Temporarily removing oneself from one's usual environment in order to become immersed in a particular subject matter.
- **Self-Study:** A self-directed learning strategy where a person has an active role in designing and managing his or her own learning.
- **Seminar:** A meeting held for the exchange of useful information by members of a common business community.
- **Virtual Classroom:** A virtual classroom is a learning environment created in a virtual space that replicates an in-classroom environment. Students and instructors participate remotely using personal computers.
- **Webinar:** A webinar is a specific type of web conference. It is typically one-way from the speaker to the audience with limited audience interaction such as in a webcast.

XII. Organizations

Organizations are groups of users which roll up into a reporting structure. Each user belongs to only one organization. It is important to identify organizations -- teams, offices, divisions, and other groups that will be used for data tracking and reporting. There is a main (root) organization under which all organizations are created.

The following root organizations are in iLearnOregon:

- **None**
- **Other, Non-State Employees:** Includes cities, counties, and other governmental entities.
 - City Government
 - County Government
 - Federal Government
 - Other Local Government Entities
 - Other, Non-Government
- **State of Oregon:** Includes all state agencies organizational structures.

XIII. Survey Scales

Survey scales are the options available that a user may choose from when taking a survey. The survey scale options that are available are the same for site, content, or course surveys.

The following survey scales will be available within every domain:

- **Yes/No**
- **True/False**
- **Five-Point Generic:** The scale will be 1 – 5.
- **Four-Point Generic:** The scale will be 1 – 4.
- **Five-Point Importance:** The scale will be Very Important, Important, Average, Slightly Important, and Not

Important. Use this scale to determine the level of importance to a person.

- **Five-Point Likelihood:** The scale will be Extremely Likely, Likely, Not Sure, Unlikely, and Extremely Unlikely. Use this scale to determine the likelihood of something occurring.
- **Five-Point Agreement:** The scale will be Strongly Agree, Agree, Neutral, Disagree, and Strongly Disagree. Use this scale to determine the level of agreement.
- **Five-Point Frequency:** The scale will be Frequently, Often, Sometimes, Seldom, and Never. Use this scale to determine the frequency of something occurring.
- **Five-Point Satisfaction:** The scale will be Excellent, Good, Average, Fair, and Poor. Use this scale to determine the level of satisfaction.
- **Four-Point Requirements:** The scale will be Exceeded, Met, Nearly Met, and Missed. Use this scale to determine if the outcome met the person's requirements.
- **Five-Point Expectations:** The scale will be Significantly Above, Above, Met, Below, and Significantly Below. Use this scale to determine if the outcome met the person's expectations.

XIV. **Course Providers**

Providers are managed in an area of the system called course providers. Course provider's offer online and classroom courses. They are displayed in a menu when creating and managing courses. Course providers are system-wide and are not domain specific which result in a single provider name list accessed by all course managers. To simplify this, course providers will be added by DAS – HRSD.

Provider Types:

- Agency by name (acronym)
- Vendor
- Professional Organization/Association

XV. **Name Conventions**

To maintain the integrity of reporting and content sharing activities, it is important to maintain a consistent naming convention for much of the content in iLearnOregon.

A formal naming convention will be used for the following content:

- All types of courses, including associated facilities and rooms
- Collaboration spaces
- All content, including documents, surveys, tests, blogs (if used outside of a collaboration space), etc.
- Custom roles
- Report layouts that are shared

The following naming conventions will apply:

- **Rooms:** Agency Acronym – Facility Name – Room Name/Number (i.e. DAS – State Library – Room 301).
- **Content:** Agency Acronym – Content Name (i.e. DAS – Introduction to Word).

- XVI. In order to request any changes to any of the above options, the Agency Domain Administrator must complete and submit a change request form to DAS – HRSD via email at ilearnoregon@state.or.us for consideration.

iLearnOregon STATEWIDE PROTOCOLS

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PROCESS:

<u>Step</u>	<u>Responsible Party</u>	<u>Action</u>
1.	Agency Domain Administrator	Submits a change request form to the DAS – HRSD via email ilearnoregon@state.or.us .
2.	DAS – HRSD	Logs the request and sends confirmation of receipt with the associated tracking number and what actions (if any) the requester needs to take during the process.
3.	DAS – HRSD	Reviews the request and either denies or approves the request.
4.	DAS – HRSD	If the request is denied, the DAS – HRSD will inform the agency and work with the agency on possible solutions.
5.	DAS – HRSD	If the request is approved, the DAS – HRSD will work with the agency to add the option to the iLearnOregon.