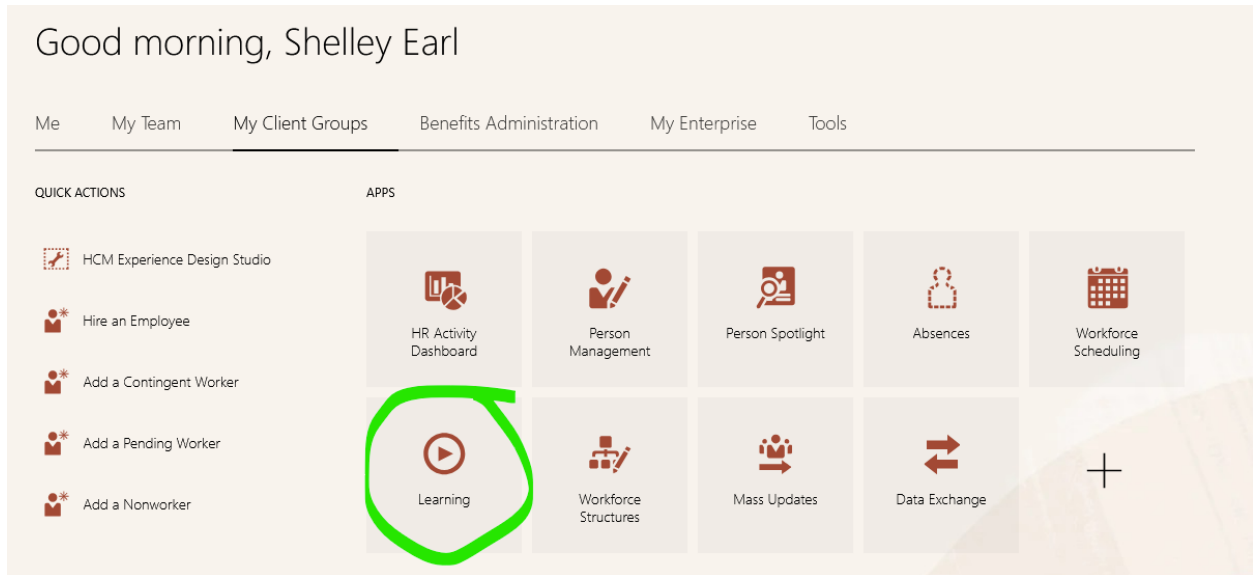


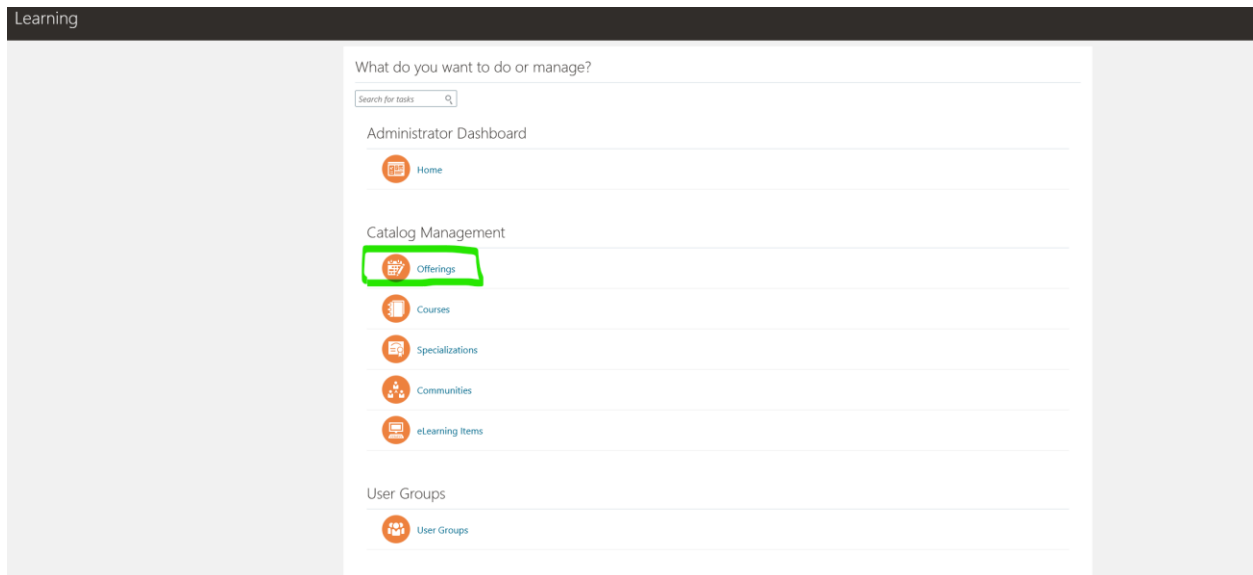
How to Guide - Enrolling and completing employees for Toolbox Talks in Oracle

This guide can also be used to enroll and complete any other learning items in Oracle outside TBTs including the Values & Expectations of 168.

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 2015 in the publish start date and search:

The screenshot shows a search interface with the following criteria:

- Match: All
- Offering Title: Contains TBT
- Publish Start Date: On or after 11/05/2015

Search Results:

| Offering Number | Course Title | Publish Start Date | Publish End Date | Offering Title |
|-----------------|---------------------------------|--------------------|------------------|---------------------------------|
| OLC589090 | RPM - TBT Workplace Harassment | 11/05/2021 | | RPM - TBT Workplace Harassment |
| OLC544090 | RPM - TBT Protecting Assets | 12/01/2021 | | RPM - TBT Protecting Assets |
| OLC566090 | RPM TBT - What is Compliance? | 02/01/2022 | | RPM TBT - What is Compliance? |
| OLC711116 | RPM TBT - EHS Facility Security | 03/03/2022 | | RPM TBT - EHS Facility Security |
| OLC731322 | RPM TBT - Raising Concerns | 04/01/2022 | | RPM TBT - Raising Concerns |
| OLC752126 | RPM TBT - Bullying | 04/29/2022 | | RPM TBT - Bullying |

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

The screenshot shows the search results page with the following criteria:

- Match: All
- Offering Title: Contains TBT
- Publish Start Date: On or after 05/09/2000

Search Results:

| Offering Number | Offering Title | Course Title | Publish Start Date | Publish End Date |
|-----------------|--------------------------------|--------------------------------|--------------------|------------------|
| OLC589090 | RPM - TBT Workplace Harassment | RPM - TBT Workplace Harassment | 11/05/2021 | |

Columns Hidden: 19

Step 5: You can access any supporting materials on this page, if a TBT the Toolbox talk poster and script will be available here:

The screenshot shows the 'RPM - TBT Workplace Harassment' offering page. The 'Related Materials' section is highlighted, showing the following materials:

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

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

RPM - TBT Workplace Harassment
Instructor-Led Offering

Overview

28
Total Active Learner Assignments

06/11/2024
Most Recent Changes

0
Learner Assignments Missing Most Recent Changes

General Information

Offering Number
OLCS89090

Offering Type
Instructor-Led

Offering Dates
11/05/2021 - 11/05/2022

Primary Classroom
No Location Defined

Published Dates
11/05/2021

Language
American English

Evaluation
-

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

Match ☒ All ☐ Any

** Name

** Assignment Status

** Person Keyword

** Initiative Name

Learner Results

| | | |
|----------------|-------------------|-----------|
| 113.5 | 1,186 | 1,201 |
| Effort (Hours) | Distinct Learners | Completed |

View Format

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

Name Sta

Voluntary Assignment

Required Assignment

No data to display.

Columns Hidden 20

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 on 05/05/2025

Assignment Profile Number OLC14194627

Description RPM HQ TBT Workplace Harassment on 05/05/2025

*Start date 05/05/2025

*Assign RPM - TBT Workplace Harassment

*Assign As Compliance

*With this note RPM HQ TBT Workplace Harassment on 05/05/2025... Live Training Completed

53 characters left

*Due Date 05/06/2025

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

53 characters left

*Due Date 05/06/2025

Learning Request Details

Start on or After mm/dd/yyyy

Complete By mm/dd/yyyy

Purchase Order Number

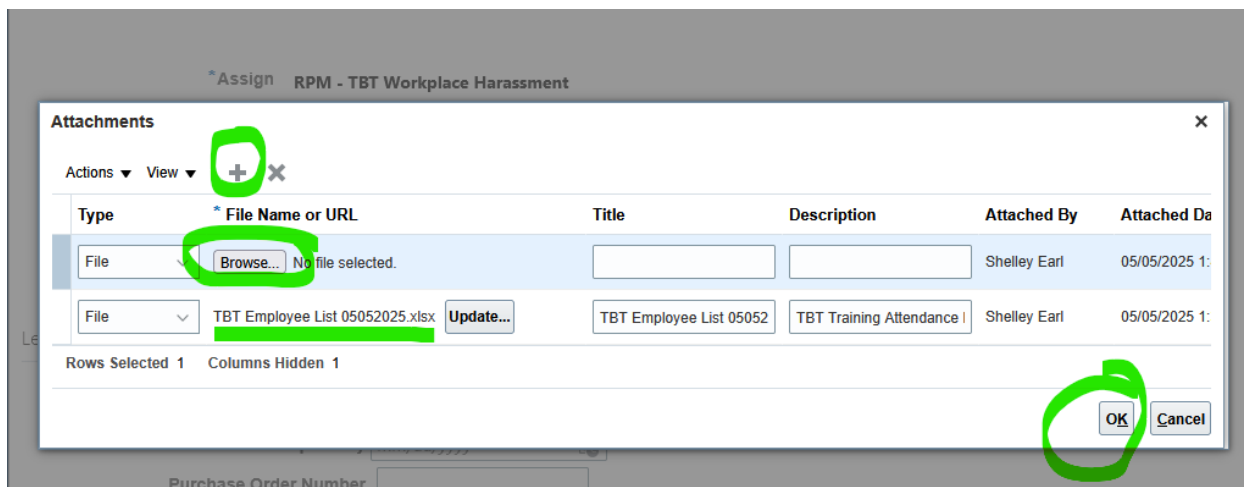
Justification

Context Segment

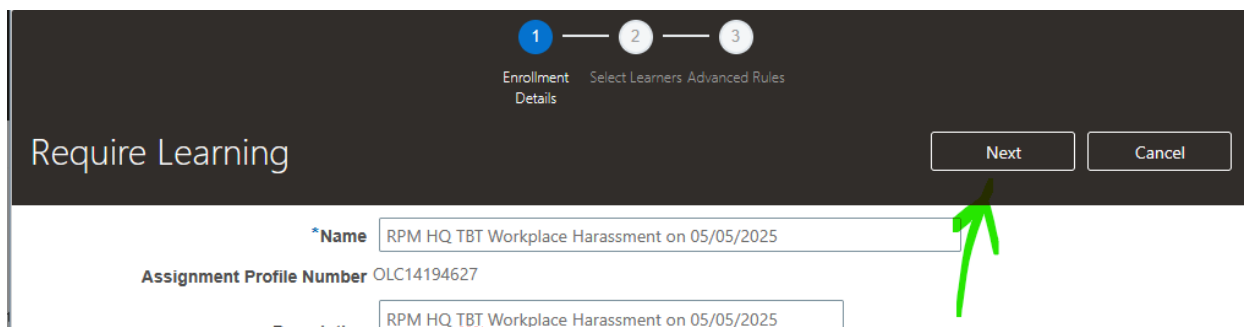
Related Materials

| 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:

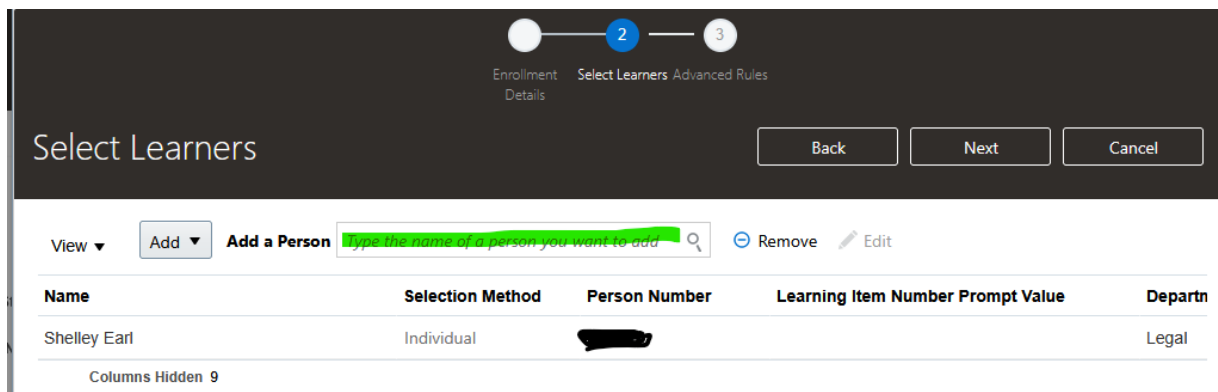


Step 11: Select Next:



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:



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

1

2

3

Enrollment Details

Select Learners

Advanced Rules

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 | Departn |
|-----------------|------------------|---------------|-----------------------------------|---------|
| Renette Faehner | Individual | | | Legal |
| Caroline Cain | Individual | | | Recharg |
| Shelley Earl | Individual | | | Legal |

Advanced rules stay as per below and select submit:

Advanced Rules

Back

Submit

Cancel

Learning Assignment Rules

Initial Assignment Status

Active

Learning Item As-of Date

Latest

Assignment Conflict Rules

When a learner has an existing assignment for this item, follow these rules.

Learners with Successfully Completed Assignments

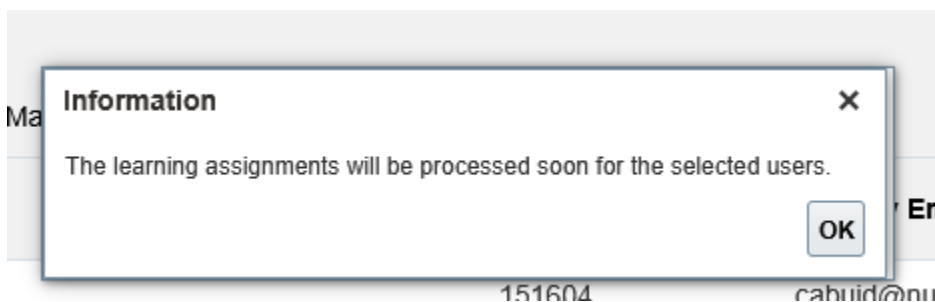
Learners with Existing Completions and Bypassed Completions

Must retake the learning

Learners Who Need to Retake, Expire Their Completion

On this assignment's due date

You should receive the below message once submitted:



(Back to Step 11 above)

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 |
|---|--------|
| 1 | 458601 |
| 2 | 24510 |
| 3 | 1279 |
| 4 | 869421 |
| 5 | 65428 |
| 6 | 4860 |
| 7 | 28130 |
| 8 | |

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

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

1 2 3

Select Learners

Back Next Cancel

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

No data to display

| Name | Selection Method | Person Number | Learning Item Number Prompt Value | Department |
|--------------------|------------------|---------------|-----------------------------------|------------|
| No data to display | | | | |

- Person
- Person Number List**
- Analysis Report Criteria
- Learning Assignment Criteria
- Organization Chart Criteria
- Person Criteria

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

Person Number List

Name: BPM HD TEST Workplace Manual

Attachments: + -

Type: File

| Type | Title | Description | Attached By | Attached Date |
|------|-----------------------------|-----------------------------|--------------|--------------------|
| File | Training records TEST up... | Training records TEST up... | Shelley Earl | 05/05/2025 2:27 PM |

Rows Selected: 1 Columns Hidden: 1

OK Cancel

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 | Departn |
|---------------------------------|--------------------|---------------|-----------------------------------|---------|
| RPM HQ TBT Workplace Harassment | Person Number List | | | |

Columns Hidden 9

Advanced rules stay as per below and select submit:

Advanced Rules

Back | Submit | Cancel

Learning Assignment Rules

Initial Assignment Status
Active ▾

Learning Item As-of Date
Latest ▾

Assignment Conflict Rules

When a learner has an existing assignment for this item, follow these rules.

Learners with Successfully Completed Assignments

Learners with Existing Completions and Bypassed Completions

Must retake the learning ▾

Learners Who Need to Retake, Expire Their Completion

On this assignment's due date ▾

You should receive the below message once submitted:

Information X

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

OK

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

Advanced Search | Saved Search | Search by Name and Status

Match: ☒ All ☐ Any

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

Search | Reset | Save

Learner Results

0 Effort (Hours) | 3 Distinct Learners | 0 Completed

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

| Name | Status | Initial Name | Progress | Person Number | Primary Email | Assignment Date | Completion Date | Location | Department | Business Unit | Country | Manager |
|-----------------|-------------|--------------|----------|---------------|-------------------|-----------------|-----------------|------------------------|----------------|---------------|---------|----------------|
| Caroline Cain | Not Started | 0 / 1 | | [REDACTED] | cacain@gmnc.com | 05/05/2025 | | Sandbach - UK | Recharge RP... | Flowcrete UK | GB | Shelley Earl |
| Shelley Earl | Not Started | 0 / 1 | | [REDACTED] | searl@gmnc.com | 05/05/2025 | | Corporate Headquarters | Legal | RPM Corp | US | Tracy Crandall |
| Renette Pachner | Not Started | 0 / 1 | | [REDACTED] | rpachner@gmnc.com | 05/05/2025 | | Corporate Headquarters | Legal | RPM Corp | US | Shelley Earl |

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

0 Effort (Hours) | 3 Distinct Learners | 0 Completed

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

Activate Assignment
Send Alert
Repeats and Approve
Repeats and Reject
Mark Activities Complete
Withdraw Learner
Delete Assignment
Update learning date

Mark Activities Complete

Records to Use: ☒ Use the 3 selected records ☐ Use all 3 results of the search criteria

Submission Notes: TBT Completed on 05/05/25

*Start date: 05/05/2025 6:44 PM

Next | Cancel

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

Mark Activities Complete

Records to Use: ☒ Use the 3 selected records ☐ Use all 3 results of the search criteria

Submission Notes: TBT Completed on 05/05/25

*Start date: 05/05/2025 6:44 PM

Next | Cancel

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

The screenshot shows the 'Action Details' form. At the top, there are two tabs: 'Basic Information' and 'Action Details', with 'Action Details' being the active tab. Below the tabs, there are three buttons: 'Previous', 'Submit', and 'Cancel'. The 'Submit' button is highlighted with a green circle, and a green arrow points to it. Below the buttons, there is a section titled 'Scope of Bulk Action'. Under this section, there is a dropdown menu labeled '*Select Activities' with the text 'RPM TBT Workplace Harassment' selected. The dropdown menu is open, showing a list of activities, with 'RPM TBT Workplace Harassment' being the only visible option.

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. At the top, there are two tabs: 'Basic Information' and 'Action Details', with 'Action Details' being the active tab. Below the tabs, there are three buttons: 'Previous', 'Submit', and 'Cancel'. The 'Submit' button is highlighted with a green circle, and a green arrow points to it. Below the buttons, there is a section titled 'Scope of Bulk Action'. Under this section, there is a dropdown menu labeled '*Select Activities' with the text 'Workplace Harassment' selected. Below this, there is a section titled 'Instructor-Led Activity Completion Configuration'. Under this section, there are four fields: 'Completion Date' with a dropdown menu showing 'Specify Date', 'Set Completion Date To' with a date field showing '05/05/2025' and a calendar icon, 'Mark Actual Effort As' with a dropdown menu showing 'Expected Effort', and 'Instructor Led On-Site' with a dropdown menu showing 'Exempted - completed elsewhere'. The 'Instructor Led On-Site' dropdown menu is open, showing a list of options: 'Exempted - completed elsewhere', 'Exempted - higher level certification attained', 'Completed offline and status verified', and 'No Show - Learner was not present'.