



VA TMS Domain Manager and Learning Manager Course

Virtual Instructor-Led Training

Participant Guide

Session 4 of 4

December 2020

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1.0 Training Overview

1.1 About the Training

1.1.1 Introduction

Thank you for attending the Veterans Affairs (VA) Talent Management System (TMS) Domain Manager and Learning Manager Training: Session 4 of 4. Through discussions, demonstrations, and hands-on activities, this training teaches DM/LM responsibilities, including working with user and administrator records, event-based curricula, assignment profiles, classes, and reports.

1.1.2 Course Delivery Methods

The DM/LM Training is a blended learning experience comprised of a prerequisite course and four VILT sessions. The following course is a prerequisite and must be completed **prior to attending** the DM/LM VILT sessions:

- Introduction to VA TMS for Administrators (VILT or WBT)

The DM/LM VILT sessions will be presented as four separate live webinars. A Web conferencing software tool will be used to conduct the training sessions.

1.1.3 Course Goal

Domain Managers and Learning Managers play an important role in helping VA employees grow professionally. Therefore, it is imperative that they are familiar with their responsibilities within the VA TMS.

The goal of the DM/LM Training is to provide instruction and interactive practice on the core concepts and administrative functions of the VA TMS specific to DM and LM roles.

1.1.4 VILT Session Objectives

The DM/LM VILT consists of four sessions, each approximately three hours in length. Here is a list of the objectives for each of the sessions. Today's training and Participant Guide will only cover Session 4.

Session 4 of 4

After completing this session, participants should be able to:

- Explain how user and admin records are created
- Merge user records
- Set up an initial-based event curriculum
- Create a cohort
- Demonstrate how to use automatic assignment methods for assigning items and curricula to users




1.2 Participant Guide

There is a separate Participant Guide for each of the four DM/LM VILT sessions. This Participant Guide is for Session 4 and is divided into two sections:

- About This Training
- Training Content

NOTE: Print a hard copy of this Participant Guide to use during training. You will need to reference the steps for all demonstrations and activities in these guides while completing steps in the VA TMS.

Table 1: Participant Guide Icons

Icons	Description
	This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS TRAIN environment.
	This icon indicates that participants will complete an activity in VA TMS TRAIN environment.
	This icon indicates that there is a job aid available for the task.

1.3 Participant Preparation and Guidelines

Participants must complete the following for this training:

- Register for training through the VA TMS.
- Attend the Virtual Instructor-Led Training (VILT) Web conferencing session.
- Complete the post-training survey.

1.4 Demonstrations and System Practice Activities in VA TMS TRAIN Environment

During this training, you will observe instructor demonstrations and complete system practice activities within the VA TMS TRAIN environment. These demos and activities will allow you to study and apply what you've learned about the features, functions, and processes critical to your role within the VA TMS. The steps for each demonstration and activity have been provided in this guide so you can follow along. You may also want to reference these steps after the training.

1.5 Virtual Instructor-Led Training Guidelines

This training will be delivered as a Virtual Instructor-Led Training (VILT) using Web conferencing software. You will need a computer and phone with speakers or a headset to participate in this training. Follow the guidelines below to ensure the best training experience:

- **Print** a hard copy of this **Participant Guide** to use during training.
- Be sure to log into the Web conferencing software and dial in to the conference line 5 – 10 minutes early.
- Mute your phone line for the duration of the training session unless otherwise instructed.
- Use the chat feature for any questions during the session.
- The instructor may be able to answer your questions immediately. Otherwise, they will answer at the end of the training or send an email afterward.

1.6 Course Length

The table below includes a list of all training lessons in the DM/LM 4 session, along with estimated times. Only Session 4 will be covered in today’s training and Participant Guide.

Table 2: DM/LM Lessons and Durations

Lessons	Estimated Time
Welcome and Introduction	15 minutes
Lesson 1: User Records	60 minutes
Lesson 2: Event-Based Requirements	40 minutes
Lesson 3: Assignment Profiles	40 minutes
Lesson 4: Creating Cohorts	15 minutes

Total: 2 hours, 40 minutes

2.0 Domain Manager and Learning Manager Training: Session 4 of 4

2.1 Welcome and Introduction

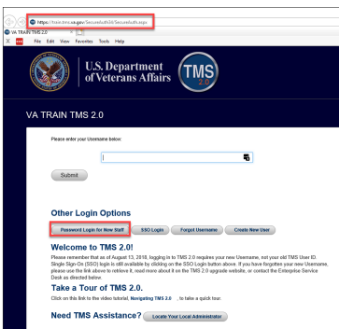
System Login

- In your browser, navigate to:
<https://train.tms.va.gov/SecureAuth34/>
- Select the **Password Login for New Staff** button.
- Enter your TRAIN Admin ID and Password.

Audio (opens 10 minutes before class):

- Dial into the AUDIO-VANTS LINE:
1-800-767-1750
- ACCESS CODE: 48596#

Download and print the Participant Guide from the class email or from the class chatroom.



Slide 1: System Login

System Login

Ten minutes before class begins, follow the instructions on the slide to login to the TRAIN environment and dial into the Audio-VANTS line. Ask any questions you may have for the instructor using the chat feature.

- **Train Environment Link:**
<https://train.tms.va.gov/SecureAuth34/>
- Select Password Login for New Staff
- Enter your TRAIN Admin ID and Password
- **VANTS Line Audio:** 1-800-767-1750
- **Access Code:** 48596#



Slide 2: VA TMS Domain Manager and Learning Manager Administrator Course: Session 4 of 4

Welcome


Welcome to Session 4 of the VA TMS Domain Manager and Learning Manager Training.

If you have any questions throughout the training session, you can send a message through the Chat function, and the instructor can answer it or show a demonstration where appropriate. Otherwise, there will be a question session at the end of the training.

Also, please make sure that you mute your phone lines to minimize any background noise during the training session.

PARTICIPANT INTRODUCTIONS

- Your name (including any nicknames)
- Where you work




Slide 3: Participant Introductions

Participant Introductions

Please use the chat feature to introduce yourself by sharing your name, including any nicknames and your VA division or location.

PARTICIPANT GUIDE

- Copies of all PowerPoint slides
- Space for taking notes
- Directions for completing individual and group activities




Slide 4: Participant Guide

Participant Guide

Each of you has a Participant Guide that has been developed to support learning during and after this training session. This guide contains copies of all PowerPoint slides, space for taking notes, and directions for completing activities.

LOGISTICS

- Scheduled breaks
- Use the chat feature to ask questions
- Ensure your audio is on mute



Slide 5: Logistics


Logistics

Please review the following training logistics:

- A 10-minute break will be provided roughly every hour.
- Feel free to ask questions at any time using the chat feature.
- Please mute your phone and do not put the call on hold at any time during the training.

COURSE GOALS

Provide instruction and interactive practice of the core concepts and administrative functions of the VA TMS specific to Domain Manager and Learning Manager job functions.



The diagram illustrates a process flow. At the top is a circle labeled 'GOAL'. Below it are two circles labeled 'STEP 2' and 'STEP 3'. Red arrows point from 'STEP 2' and 'STEP 3' towards the 'GOAL' circle. To the right of the diagram is a close-up image of a silver pen tip.


Slide 6: Course Goals

Course Goals

The goal of this training is to provide instruction and interactive practice on the core concepts and administrative functions of the VA TMS specific to Domain Manager and Learning Manager job functions.

COURSE STRUCTURE

- Four separate web conferencing sessions
- Each no longer than 4 hours in length
- Each session organized into lessons and topics

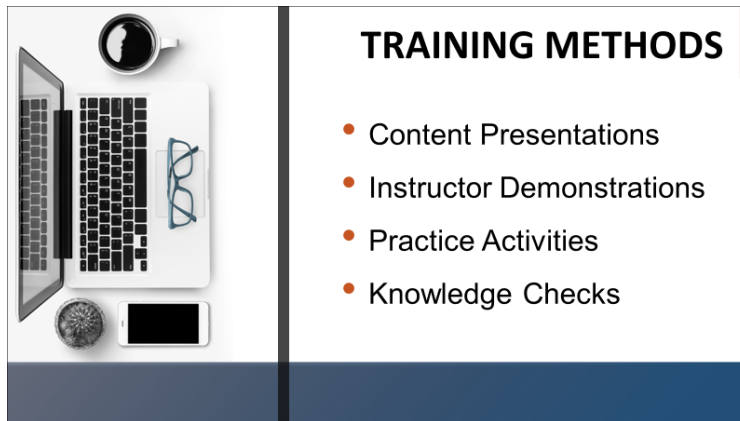


The image shows a hand holding a smartphone. The screen of the phone displays a logo with the letters 'TMS' inside a circle, surrounded by a network of lines and nodes. In the background, a laptop screen is visible, also showing a similar network diagram.

Slide 7: Course Structure

Course Structure

The DM/LM VILT consists of four sessions, each no longer than four hours. Each session is organized into lessons and topics.



TRAINING METHODS

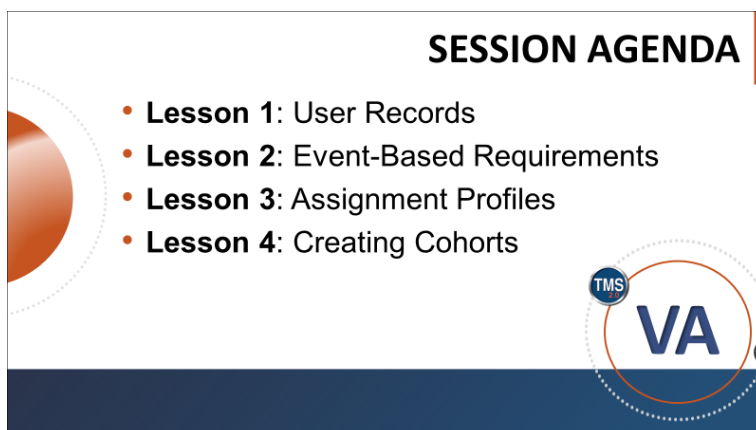
- Content Presentations
- Instructor Demonstrations
- Practice Activities
- Knowledge Checks

Slide 8: Training Methods

Training Methods

Although there will be session-specific variations, each VILT session will include the following training methods:

- **Content presentations:** Content presentation refers to the delivery of the training to best facilitate participant engagement, and the content presentations include the visual elements of the PowerPoint slides, demonstrations, and activities within the VA TMS.
- **Instructor demonstrations:** The instructor will demonstrate many of the VA TMS tasks you will perform as a DM or LM.
- **Practice activities:** You will practice key actions through hands-on activities in the VA TMS.
- **Knowledge checks:** Your knowledge of key content will be assessed through multiple-choice and true-false knowledge check questions.



SESSION AGENDA

- **Lesson 1:** User Records
- **Lesson 2:** Event-Based Requirements
- **Lesson 3:** Assignment Profiles
- **Lesson 4:** Creating Cohorts

Slide 9: Session 4 Agenda

Session 4 Agenda

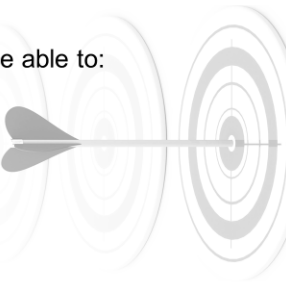
Session 4 is organized into the following lessons:

- Lesson 1: User Records
- Lesson 2: Event-Based Requirements
- Lesson 3: Assignment Profiles
- Lesson 4: Creating Cohorts

SESSION OBJECTIVES

After completing this session, you will be able to:

- Manage user and administrator records
- Merge user records
- Set up an initial-based event curriculum
- Use automatic assignment methods (assignment profiles) and manual assignment methods (cohorts) to assign items and curricula to users



Slide 10: Session 4 Objectives

Session 4 Objectives

After completing this session, you will be able to:

- Manage user and administrator records
- Merge user records
- Set up an initial-based event curriculum
- Use automatic assignment methods (assignment profiles) and manual assignment methods (cohorts) to assign items and curricula to users

QUESTIONS?



Slide 11: Questions?

Questions?

If you have any questions about the material that will be covered in today's session, please ask them using the chat feature at this time.

2.2 Lesson 1: User Records



Slide 12: Lesson 1: User Records

Lesson 1: User Records

During the *Introduction to the VA TMS for Administrators* course, you were introduced to the User Record and its three main areas: Core, Related, and Actions.

Lesson 1 builds on this information and explains how to work with those records as well as how to add and edit administrator records.

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Explain how user records are created in Profile Maintenance
- Manage user records
- Merge user records
- Add and edit admin records
- Deactivate an admin record

Slide 13: Lesson 1 Objectives

Lesson 1 Objectives

After completing this lesson, you will be able to:

- Explain how user records are created in Profile Maintenance
- Manage user records
- Merge user records
- Add and edit admin records
- Deactivate an admin record

Notes: _____

Adding Users in Profile Maintenance

Profile Maintenance:

- A utility used to add users to TMS
- Exists in VA's Intranet for security purposes
- Profiles created will be overwritten by the PAID database if the information is incorrect

Slide 14: Adding Users in Profile Maintenance

Adding Users in Profile Maintenance

For all VA employees, permanent TMS user records are created through the VA's PAID (Personnel and Accounting Integrated Data) database. However, if a new employee needs access to training before this process is completed, then Profile Maintenance can be used to create user records and profiles in TMS. Profile Maintenance exists within the VA's Intranet for security purposes, where it protects all employees' Social Security numbers. There is a firewall between Profile Maintenance and the VA TMS, which exists on the Internet.

When a new user is added to Profile Maintenance, their employee type is identified. All VA and non-VA employees other than trainees (including contractors and volunteers) need to complete mandatory/required training to meet security requirements.

After the permanent user record is created, it will overwrite the record created in Profile Maintenance, though any learning information is retained. If there are any differences in naming, a separate record will be created, and the one from Profile Maintenance will need to be merged into the new one (which will remain the official record). Any permanent changes to the user's information will have to be updated in the PAID Database, as it updates into TMS nightly.

Note: This course does not address how to use Profile Maintenance. There is a separate training course for that topic. However, DMs and LMs should have the conceptual understanding for how user records are

Notes: _____

created in Profile Maintenance and how the process can impact an employee's To-Do List.

Notes: _____

The Educational Data Repository

The Educational Data Repository (EDR):

- Replaces critical information, such as SSNs, with a unique code or identifier
- Supplies educational data to the VA TMS
- Updates the VA TMS every **three minutes**, ensuring it is working with the most current data

Note: Personnel and Accounting Integrated Data (PAID) is VA's database for payroll records.

Slide 15: The Educational Data Repository

The Educational Data Repository

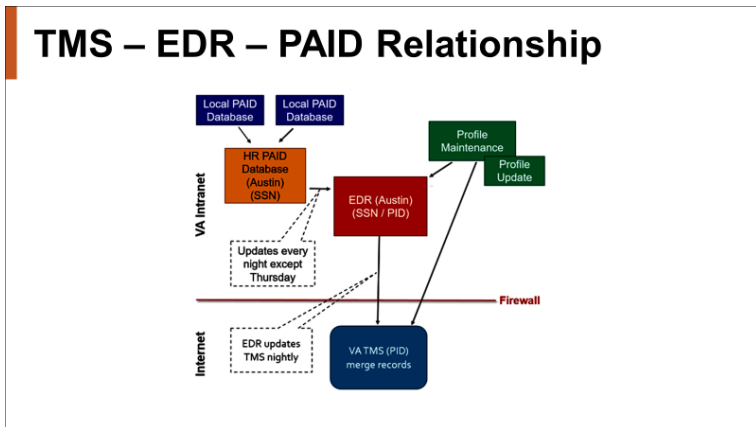
The VA's Educational Data Repository (EDR) updates data from Profile Maintenance every three minutes and pushes the data nightly through the VA's firewall to the VA TMS, which resides on the Internet.

EDR replaces SSNs with unique identifiers for the VA TMS.

In addition to updating data from Profile Maintenance, EDR updates the VA TMS with data from the VA's Personnel and Accounting Integrated Data (PAID) database. PAID also contains payroll records that include Time and Leave reports.

Although local PAID databases are decentralized, they are all connected to the HR PAID database in Austin, Texas. EDR updates the data from the Austin PAID database every night, except Thursday, and pushes it to the VA TMS.

Notes: _____



Slide 16: TMS – EDR – PAID Relationship

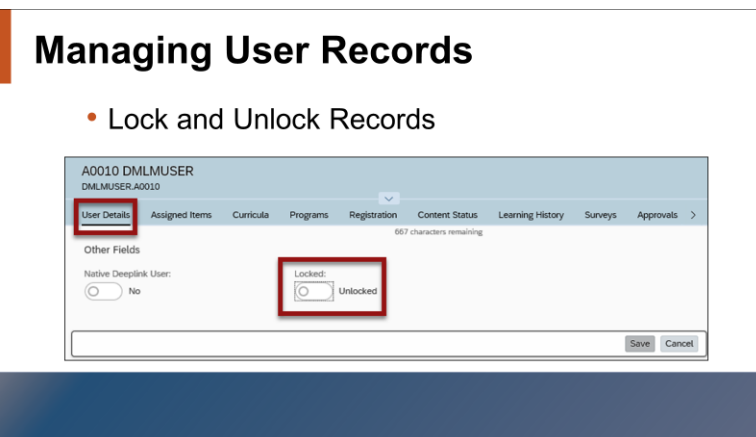
TMS-EDR-PAID Relationship

In order for the VA TMS to identify the corresponding profiles in Profile Maintenance, the EDR replaces critical information, such as SSNs, with a unique identifier known as the Person ID (PID).

Rather than identifying an individual by his or her SSN, EDR automatically generates and uses a PID when the user record is created.

An example of a PID is 34520. EDR serves an important role in supplying educational data to the VA TMS and updates the VA TMS every three minutes, ensuring the VA TMS contains the most current data. EDR pushes updated information through the VA firewall to the VA TMS.

EDR is also responsible for manipulating data from the VA’s PAID database.



Slide 17: Managing User Records

Managing User Records

Profile Maintenance is the primary way to update user records. However, there is a process you should know how to do.

If a user account is locked, an administrator needs to unlock the user account. To do this, the admin will search for the user record, go to the User Details tab of the related area and change the slider to unlocked.

Notes: _____



Slide 18: Demonstration: Working with User Records

Demonstration: Working with User Records

Now, the instructor will demonstrate working with user records.

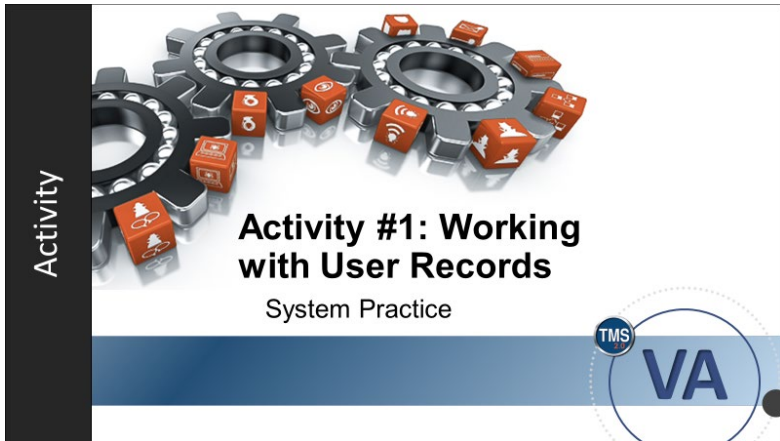
Notes: _____



Demonstration: Working with User Records

1. Navigate to **People > Users**.
2. Enter your search criteria in the appropriate text boxes (User ID: **dmlmu**).
3. Select **Search**.
4. Locate a user from the search results list.
5. Select the **User ID hyperlink** to open the record.
6. Under the **User Details** tab of the Related Area, scroll to the bottom and activate the **Locked** slider.
7. Select the slider again to **unlock** the user account.
8. Select **Save**.

Notes: _____



Slide 19: Activity #1: Working with User Records

Activity #1: Working with User Records

- Now you will have an opportunity to practice working with user records on your own.
- Complete the steps for this activity on the next page.
- If you have any questions during the activity, send them to the instructor using the Chat feature.

Notes: _____



Activity #1: Working with User Records

1. Navigate to **People > Users**.
2. Enter your search criteria in the appropriate text boxes (User ID: **dmlmu**).
3. Select **Search**.
4. Locate a user from the search results list.
5. Select the **User ID hyperlink** to open the record.
6. Under the **User Details** tab of the Related Area, scroll to the bottom and activate the **Locked** slider.
7. Select the slider again to **unlock** the user account.
8. Select **Save**.



Job Aid: Available on the TMS Resource site.

Notes: _____

Merging User Records

- Sometimes two records representing the same user with different content can exist at the same time
- These records need to be merged into one, which will carry over all learning information from secondary to primary record
- TMS associations from the secondary record such as favorites will be lost

Slide 20: Merging User Records

Merging User Records

Sometimes two records representing the same user with different content can exist at the same time. In these cases, admins will need to merge the user records. Consolidation requires transferring learning assignments, learning events, etc. This can be done easily with VA TMS.

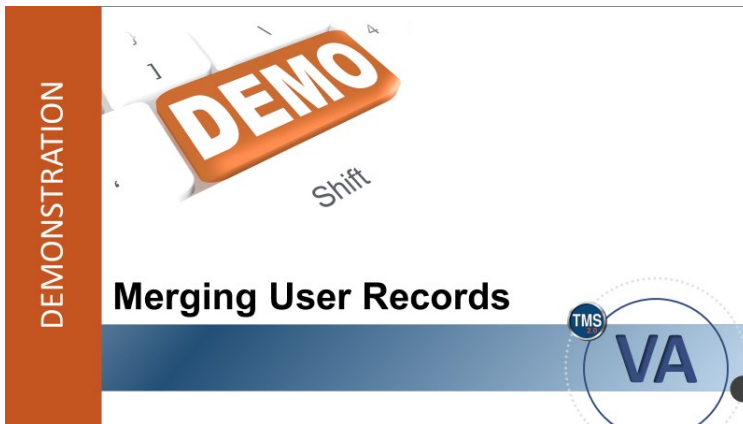
The primary and secondary user records are known as “**Merge Into**” and “**Merge From**,” respectively.

WARNING: If the secondary user record has an account, this action will remove the user’s association with any content that has been added. This cannot be undone.

Only those with the role of **User Management** can merge user records.

Demonstration: Merging User Records

Now, the instructor will demonstrate merging user records.



Slide 21: Demonstration: Merging User Records

Notes: _____



Demonstration: Merging User Records

1. Expand the **People** tab on the main menu.
2. Select **Merge Users**.
3. Enter search criteria for duplicate users (User ID: **dmlmu**).
4. Select **OK** in the popup window. **NOTE:** For training purposes, assume the two IDs you select for this exercise are duplicate users.
5. Select the primary, or “**Merge Into,**” record, and the secondary, or “**Merge From,**” record.
6. Select **Merge**.
7. Review the Merge Details.
8. Select the **Details** icon in each row for additional information about the merge.

Notes: _____



Slide 22: Activity #2: Merging User Records

Activity #2: Merging User Records

- Now you will have an opportunity to practice merging user records on your own.
- Complete the steps for this activity on the next page.
- If you have any questions during the activity, send them to the instructor using the Chat feature.

Notes: _____



Activity #2: Merging User Records

1. Expand the **People** tab on the main menu.
2. Select **Merge Users**.
3. Enter search criteria for duplicate users (User ID: **dmlmu**).
4. Select **OK** in the popup window. **NOTE:** For training purposes, assume the two IDs you select for this exercise are duplicate users.
5. Select the primary, or “**Merge Into**,” record, and the secondary, or “**Merge From**,” record.
6. Select **Merge**. **NOTE:** Once you’ve completed the merge, enter the two User IDs you selected in the chat room. This will prevent another administrator in the class from selecting the same User IDs to merge.
7. Review the Merge Details.
8. Select the **Details** icon in each row for additional information about the merge.

Notes: _____

What utility is used to create **temporary** user records that are pushed to VA TMS?



- a) Educational Data Repository
- b) Profile Maintenance
- c) Personnel Accounting Integrated Data
- d) None of the above

KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature.

What utility is used to create **temporary** user records that are pushed to VA TMS?

- a) Educational Data Repository
- b) Profile Maintenance
- c) Personnel Accounting Integrated Data
- d) None of the above

Slide 23: Knowledge Check

When the Merge Record workflow has been completed, it is irreversible.



- a) True
- b) False

KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature.

When the Merge Record workflow has been completed, it is irreversible.

- a) True
- b) False

Slide 24 Knowledge Check

Notes: _____

Adding New Admin Accounts

- When creating new admin accounts, identify an individual's administrative role(s). The assigned roles will determine the different permissions in the VA TMS.
- There are many VA TMS administrator roles as well as secondary or add-on administrator roles.

Slide 25: Adding New Admin Accounts

Adding New Admin Accounts

In the System Admin section, you can manage how the VA TMS looks and functions.

When creating new admin accounts (System Administration > Security > Administrators), you will need to identify an individual's administrative role(s). The assigned roles will determine the different permissions in the VA TMS that the admin will be able to see and perform.

There are many VA TMS administrator roles as well as additional, or secondary, administrator roles, which are referred to as add-on roles.

Usually, an administrator will receive a primary role along with a secondary role; however, an add-on role may function independently.

Notes: _____

Considerations When Granting Permissions

- Domain Manager is an add-on role and must be assigned with the Learning Manager role
- Only DMs have the privilege to create new admin records
- LMs have the responsibility of managing and tracking User training needs
- There should rarely be more than two DMs for any security domain, and a limited number of LMs

Slide 26: Considerations When Granting Permissions

Considerations When Granting Permissions

Only VA Domain Managers have the privilege to create new admin records. It is extremely important that DMs exercise restraint in creating and granting VA TMS admin permissions. There should rarely be more than two DMs for any security domain.

Learning Managers have almost all the permissions of DMs, and there should be a limited number of LMs for any security domain. Similar consideration should be used for more restricted admin accounts, such as Item Manager and Assignment Manager. You should have as few administrators in a security domain as possible. This helps prevent redundancy and ensures accuracy in the records created in the VA TMS.

Deactivating Admin Accounts

- Lock the account
- Remove email address
- Remove related user
- Remove all roles

Slide 27: Deactivating Admin Accounts

Deactivating Admin Accounts

Admins may also need to deactivate an admin account. The process for doing so is:

- Lock the account
- Remove email address
- Remove related user
- Remove all roles assigned to the admin

Notes: _____



Demonstration: Working with Admin Records

Now, the instructor will demonstrate working with admin records.

Slide 28: Demonstration: Working with Admin Records

Notes: _____



Demonstration: Working with Admin Records

To Add a New Admin Record:

1. Expand the **System Administration** tab on the main menu.
2. Expand the **Security** tab.
3. Select **Administrators**.
4. Select **Add New**.
5. Create an **Admin ID** (e.g., John.Doe123).
6. Enter the **Last Name** (Doe).
7. Enter the **First Name** (John).
8. Enter the **Security Domain** (TRAIN). **NOTE:** All records are assigned to a security domain. The security domain is a way to show administrative ownership and determines which admin(s) will manage the record. When adding admin records, always specify the security domain to which the record should belong.
9. Search for the **Related User** by selecting the magnifying glass icon. Enter the search criteria (User ID: dmlmu), then select a random user. **NOTE:** In the real world, you would search for and select the administrator's user record for whom you're creating an admin account.
10. Enter the administrator's VA email in the **Email Address** field (john.doe@va.gov).
11. Though the administrator will never need to log in with an admin username and password (they will log in as their normal user), the fields must be set in order to create the record. In the **New Password** textbox, enter "Password#001".
12. In the **Verify Password** textbox, enter the password again.
13. Select the **Add** button.

Admin Record: Main Tabs

- The **Summary** tab allows you to edit an administrator's account information and lock an admin account to remove login privileges without changing the administrator's information. **NOTE:** Once an administrator's record has been deleted, it can be reinstated

Notes: _____

by reentering his or her Admin ID as a new account. The VA TMS will warn you that the old record exists and give you the option of recovering the old account or canceling the entire process (a new admin account cannot be created using the old ID).

- The **Assigned Roles** tab allows you to set the administrator's role(s), which determine(s) the functions the admin will be able to perform in TMS.
- The **Preferences** tab allows you to set locale preferences of the administrator (such as locale and time zone). The only Active Locale ID available is English. **NOTE:** if the Preferences tab is not filled out, the Admin Role may not work.

Assigning Admin Roles:

To receive permissions for different admin roles in the VA TMS, the creator of the record must assign the Role IDs. **NOTE:** To learn more about the roles, see the chart in the appendix of this document: VA TMS Functions and Associated Roles.

1. Select the **Assigned Roles** tab.
2. Select **add one or more from list** link to search for the Role ID. You can either enter search criteria or select **Search** to view all Role IDs.
3. Check the box in the Add column for each Role ID that should be given to the administrator.
4. Select **Add**. **NOTE:** If you know the specific Role ID, you can enter that information in the Role ID field then select Add.

Setting the Preferences:

1. Select the **Preferences** tab.
2. Enter English in the **Active Locale ID** field.
3. The **Currency ID** appears as a third required field; however, the VA does not use the system's commerce capabilities, so this field does NOT need to be completed. The Currency ID has been disabled in production.
4. The **Time Zone ID** field is very important and must be set to the administrator's local time zone. If this field is left blank, the system will default to Eastern Standard Time. The checkbox to the right of the **Time Zone ID** field should be checked since the system uses the Time Zone ID to compute start times for classes. When checked, the

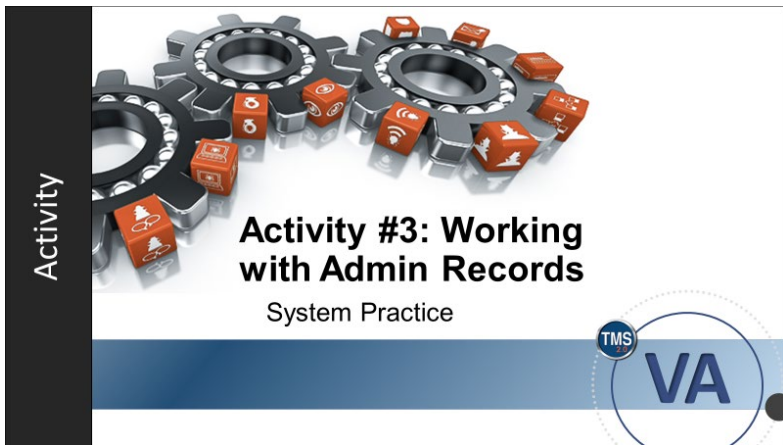
Notes: _____

classes will always display according to the Time Zone ID. **NOTE:** do NOT select Apply Changes in the Train environment. It will generate an error message since the Currency ID field is required.

Deactivating an Admin Record:

1. Select the **Summary** tab.
2. Remove the email address from the **Email Address** field.
3. Remove any information in the **Related User** field.
4. Check the **Locked** checkbox.
5. Select Apply Changes.
6. Select the **Assigned Roles** tab.
7. Remove all assigned roles by checking the boxes in the Remove column, then select **Apply Changes**.

Notes: _____



The slide features a graphic with three interlocking gears. The gears are grey and orange, with various icons on them. Below the gears, the text reads "Activity #3: Working with Admin Records" in bold, followed by "System Practice" in a smaller font. At the bottom right of the graphic is a circular logo with "TMS" and "VA" inside. A vertical black bar on the left side of the slide contains the word "Activity" in white text.

Slide 29: Activity #3: Working with Admin Records

Activity #3: Working with Admin Records

- Now you will have an opportunity to practice working with admin records on your own.
- Complete the steps for this activity on the next page.
- If you have any questions during the activity, send them to the instructor using the chat feature.

Notes: _____



Activity #3: Working with Admin Records

To Add a New Admin Record:

1. Expand the **System Administration** tab on the main menu.
2. Expand the **Security** tab.
3. Select **Administrators**.
4. Select **Add New**.
5. Create an **Admin ID** (enter your FirstName.LastName).
6. Enter the **Last Name**.
7. Enter the **First Name**.
8. Enter the **Security Domain** (TRAIN).
9. Search for the **Related User** by selecting the magnifying glass icon. Enter the search criteria (User ID: dmlmu), then select a random user. **NOTE:** In the real world, you would search for and select that administrator's user record for whom you're creating an admin account.
10. Enter the administrator's VA email in the **Email Address** field (First.Last@va.gov).
11. In the New Password textbox, enter Welcome2018!
12. In the **Verify Password** textbox, enter the password again.
13. Select the **Add** button. **NOTE:** If you receive an error about the Related User, then choose another DMLM user account.

Assigning Admin Roles:

1. Select the **Assigned Roles** tab.
2. Select add one or more from list link.
3. Select **Search**.
4. Check the box in the Add column for **TRAIN- Ad Hoc Notification Manager**.
5. Select **Add**.

Notes: _____

Setting the Preferences:


1. Select the **Preferences** tab.
2. Enter **English** in the Active Locale ID field.
3. Disregard the **Currency ID** field. It is not actually a required field.
4. Select Eastern Standard Time from the Time Zone ID dropdown list. **NOTE:** You will **NOT** select Apply Changes in the Train environment. It will produce an error because the Currency ID field is left blank. **NOTE:** If you do not complete the Preferences tab in production, it will negatively impact access to the admin account.

Deactivating an Admin Record:

1. Select the **Summary** tab.
2. Remove the email address from **Email Address** field.
3. Remove the user from the **Related User** field.
4. Check the **Locked** checkbox.
5. Select **Apply Changes**.
6. Select the **Assigned Roles** tab.
7. Remove the assigned role by **checking the box** in the Remove column.
8. Select **Apply Changes**.

Notes: _____

To deactivate an admin account, you must remove the email address and remove the related user. What are the other two steps?



- a) Change the Active Locale ID
- b) Remove all Admin Roles
- c) Lock the Account
- d) Remove the Reply to Address

KNOWLEDGE CHECK

Slide 24: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

To deactivate an admin account, you must remove the email address and remove the related user. What are the other two steps?

- a) Change the Active Locale ID
- b) Remove all Admin Roles
- c) Lock the Account
- d) Remove the Reply to Address

QUESTIONS?



QUESTIONS?

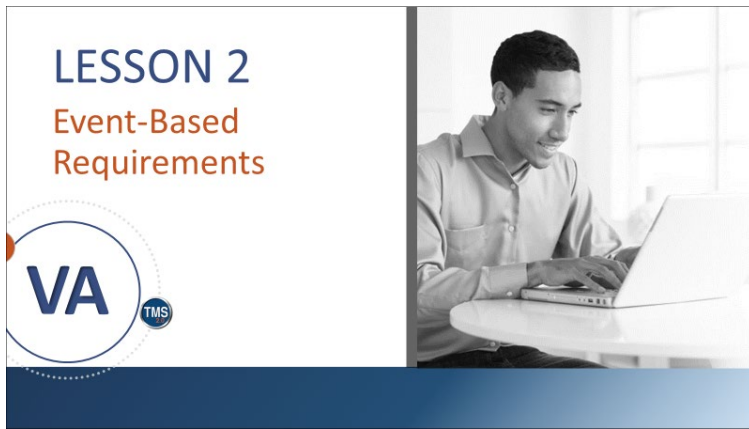
Slide 25: Questions?

Questions?

If you have any questions about the material covered so far, please ask them using the chat feature at this time.

Notes: _____

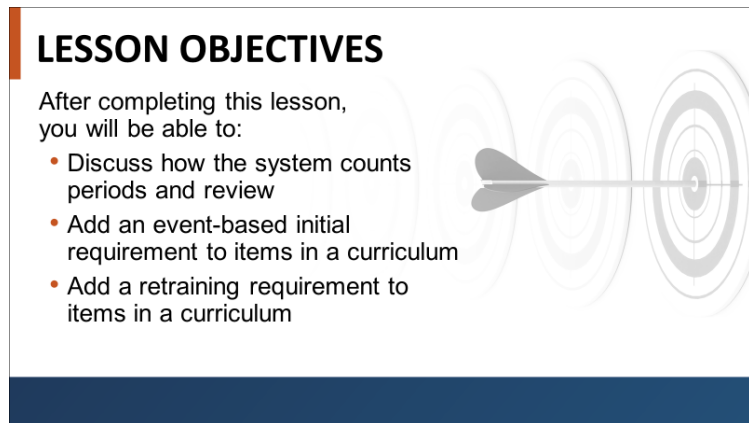
2.3 Lesson 2: Event Based Requirements



Slide 26: Event-Based Requirements

Lesson 2: Event-Based Requirements

Session 1 of the DMLM series discusses creating and configuring curricula. This lesson expands on this topic by reviewing event-based initial requirements and retraining requirements. Let's look at the learning objectives for Lesson 2.



Slide 27: Lesson 2 Objectives

Lesson 2 Objectives

After completing this lesson, you will be able to:

- Discuss how the system counts periods and review
- Add an event-based initial requirement to items in a curriculum
- Add a retraining requirement to items in a curriculum

Notes: _____

Period-Based Curricula

After an administrator groups items into a curriculum, the following questions need to be answered:

- How much initial completion time should be granted to the user for each item?
- Do the items within the curriculum require retraining?
- Does it need additional curriculum requirements?

Slide 28: Period-Based Curricula

Period-Based Curricula

After an administrator groups items into a curriculum, the following questions need to be answered:

- How much initial completion time should be granted to the user for each item?
- Do the items within the curriculum require retraining?
- Does it need additional curriculum requirements?

Retraining Assignments

- Items that must be repeated on recurring intervals will have a Retraining assignment
- Items must be placed in a curriculum to feature retraining
- Once the item is complete and recorded, it is flagged as complete
- The next Required-By date will be calculated by the Retraining assignment

Slide 29: Retraining Assignments

Retraining Assignments

When a user needs to complete an item on a recurring basis, it must be in a curriculum and have a retraining period. Once the item is complete and recorded, it is flagged as complete. The next Required-By date will be calculated by the Retraining assignment.

Notes: _____

Item Settings

Each item in a curriculum has the following settings:

- Initial Assignment
- Retraining Assignment
- Effective Date
- Assignment Type



Slide 30: Item Settings

Item Settings

There is no limit to the number of items that may be added to a curriculum. Each item in a curriculum has the following settings:

- **Initial Assignment:** The amount of time a user has to initially complete the item
- **Retraining Assignment:** The amount of time before the user must complete the training again.
- **Effective Date:** The date when the item has an impact on the overall curriculum status
- **Assignment Type:** Required or Optional

Notes: _____

Initial Basis

- Every item requires an initial basis date to calculate its initial and retraining assignment dates.
- TMS supports **Calendar Basis** (the date is chosen from a calendar, and is not generally used by the VA) and **Event Basis**, which may refer to:
 - Hire Date
 - Assignment Date (of the curriculum)
 - Learning History completion date (of the initial assignment, used for retraining)

Slide 31: Initial Basis

Initial Basis

The system has two options available when setting initial and retraining assignments:

- **Event Basis:** Hire date or assignment date only (used by the VA)
- **Calendar Basis:** Any particular date on the calendar (not generally used by the VA)

Using event basis, the VA TMS calculates the required date by completing the current period and then adding the initial/retraining assignment. The triggers for required date calculation to begin are:

- Assignment date (initial assignment) or the user's hire date
- Learning History completion date (retraining assignment)

If you select Assignment Date as the required date basis, then the system calculates all the completion statuses and next assignment dates based on when the curriculum was assigned to a user.

Many times, organizations want the calculations to be based on when a new employee was hired; therefore, if you select Hire Date as the required date basis, then the system uses the value in the Hire Date box of the user's record to calculate completion status and next assignment dates. (**People > Users > User Details**)

Notes: _____

Configuring Retraining Assignments

- The system has to complete the current period (day, month, year, quarter) before it can begin counting a new one
- TMS calculates the required-by date upon completion of the initial item and the period
- The number of times it will occur will depend on the retraining number

Slide 32: Configuring Retraining Assignments

Configuring Retraining Requirements

It is important to remember that the VA TMS must complete the current period (day, month, year, quarter) before it can begin counting a new one.

An example: A user is assigned an item with an initial assignment of 30 days and an assignment date of 10/16/2019. The VA TMS calculates an initial required-by date of 11/16/2019 (it completes the current day period 10/16, and then counts 30 days).

This item also requires retraining every 90 days.

As a result, if the user completes the item on 11/01/2019 (this date is recorded in the Learning History), then it will be due again 90 days from date of initial completion, 01/30/2020.

Notes: _____

Effective Date

- A user must complete a required item before the effective date to avoid a curriculum status of Incomplete
- If an effective date is in the future, it will not affect the overall completion status of the curriculum
- Effective dates only affect Incomplete and Complete curricula status and do not change required dates
- Not applicable to optional items

Slide 33: Effective Date

Effective Date

The effective date of a required item identifies when the curriculum status changes to Incomplete if the user does not complete the item. This is equivalent to a grace period.

For example, the effective date is set in the future to allow users who completed the original version of an item time to complete the revised item.

Since the effective date is set in the future, the new version will not affect the completion status of the curriculum until it becomes effective.

Therefore, the user's curriculum status does not revert to Incomplete. Effective dates only affect Incomplete and Complete curricula statuses and do not interfere or change required dates.

Assignment Type

- The assignment type is a status assigned to an item that indicates the level of importance to the user. The two assignment types are **Required** and **Optional**.
- A user must complete all required items in a curriculum to obtain a Complete status.

Slide 34: Assignment Type

Assignment Type

The assignment type is a status assigned to an item that indicates the level of importance to the user and includes: Required or Optional.

A user must complete all required items (and any curriculum requirements) to obtain a Complete curriculum status.

Notes: _____

Required Dates Practice

Assignment	Date Period	Number	Due Date
3/15/2019	Years	1	12/31/2020
3/15/2019	Days	365	03/15/2020
3/15/2019	Months	6	09/30/2019
3/15/2019	Days	183	09/15/2019
3/15/2019	Quarters	1	06/30/2019
3/15/2019	Months	3	06/30/2019
3/15/2019	Days	90	06/15/2019

Slide 35: Required Dates Practice

Required Dates Practice

This chart shows several examples of required dates for different period types, all of which have the assignment date of March 15, 2019.

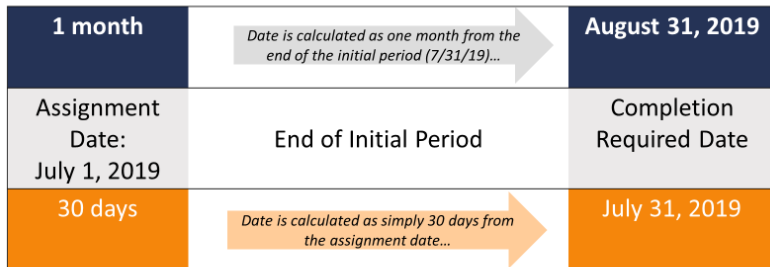
- In the first row, the period is one year, so at the end of that year (December 31, 2019), the user has one full calendar year before it is due (December 31, 2020).
- In the second row, the period is 365 days, so the due date is March 15, 2019.
- In the third row, the period is 6 months, so the due date is September 30, 2019.
- In the fourth row, the period is 183 days, so the due date is September 15, 2019.
- In the fifth row, the period is 1 quarter, so the due date is June 30, 2019.
- In the sixth row, the period is 3 months, so the due date is June 30, 2019.
- In the seventh row, the period is 90 days, so the due date is June 15, 2019.

So, the user **always** finishes the current Period before the next begins, and the item is due.

Notes: _____

Event Basis Example

- 1 Month vs 30 Days



Slide 36: Event Basis Example 1

Event Basis Example 1

This diagram shows the difference between 1 Month and 30 Days, which seem similar, but have two very different Completion Required dates.

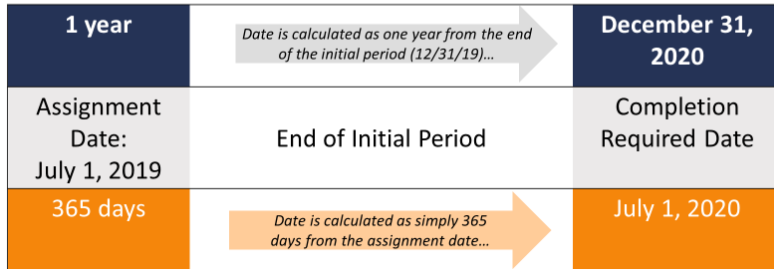
If an item is assigned on July 1, 2019, with a period of one month, the user ends the current period on July 31, and then has one full month, making the item due August 31, 2019.

If the item is assigned on July 1, 2019, with a period of 30 days, the user ends the current period on July 1, and then has 30 full days, making the item due July 31, 2019.

Notes: _____

Event Basis Example

- 1 year vs 365 days



Slide 37: Event Basis Example 2

Event Basis Example 2

This diagram shows the difference between 1 Year and 365 Days, which seem similar, but have two very different Completion Required dates.

If an item is assigned on July 1, 2019, with a period of one year, the user ends the current period on December 31, 2019, and then has one full year, making the item due December 31, 2020.

If the item is assigned on July 1, 2019, with a period of 365 days, the user ends the current period on July 1st, and then has 365 full days, making the item due July 1, 2020.

- Assignment Date: **January 24, 2019**
- Number: **5**
- Period: **Months**



KNOWLEDGE CHECK

1. What is the **End Date** of the **Initial Period** (Months)?
2. What is the **Completion Required Date**?

Knowledge Check


In this example, the assignment date starts on January 24, 2019, for a period of 5 months.

1. What is the end date of the initial period (Months)?
2. What is the Completion Required Date?

Slide 38: Knowledge Check

Notes: _____

- Assignment Date: **January 24, 2019**
- Number: **365**
- Period: **Days**



1. What is the **End Date** of the **Initial Period** (Days)?
2. What is the **Completion Required Date**?

KNOWLEDGE CHECK


Slide 39: Knowledge Check

Knowledge Check

In this example, the assignment date starts on January 24, 2019, for a period of 365 days.

1. What is the end date of the initial period?
2. What is the Completion Required Date?

- Assignment Date: **January 24, 2019**
- Number: **1**
- Period: **Year**



1. What is the **End Date** of the **Initial Period** (Years)?
2. What is the **Completion Required Date**?

KNOWLEDGE CHECK

Slide 40: Knowledge Check

Knowledge Check

In this example, the assignment date starts on January 24, 2019, for a period of 1 year.

1. What is the end date of the initial period?
2. What is the Completion Required Date?

Notes: _____

Editing Initial and Retraining Dates

Remember

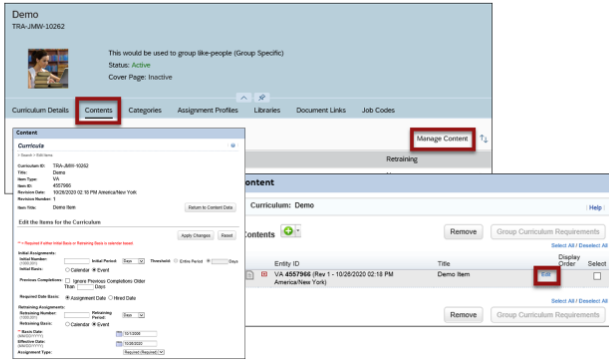
CCME:

Curriculum - navigate to the Curriculum record

Contents - select Contents from the Related area

Manage Content - click the Manage Content button

Edit - select the Edit link for the Item you want to set Required Dates for

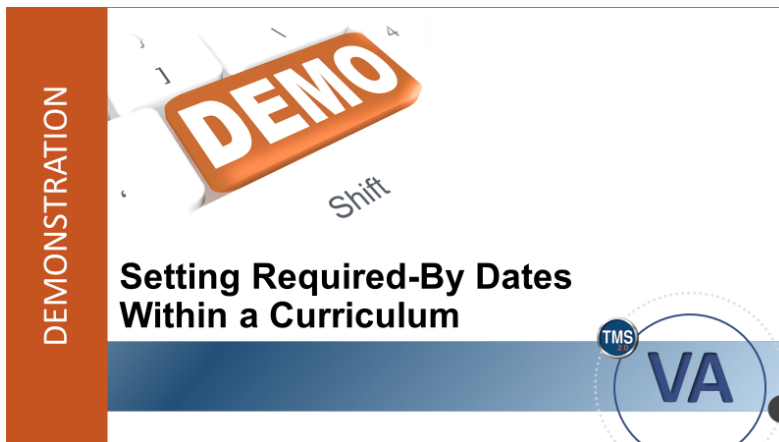


Slide 41: Setting and Editing Initial and Retraining Dates

Setting and Editing Initial and Retraining Dates

Use the following acronym to help you remember how to set and edit initial and retraining dates—CCME:

- **C**urriculum: Navigate to the Curriculum Record
- **C**ontents: Select Contents from the Related area
- **M**anage Content: Click the Manage Content button
- **E**dit: Select the small, blue Edit link for the item you want to set required dates for



Slide 42: Demonstration: Setting Required-By Dates Within a Curriculum

Demonstration: Setting Required-By Dates Within a Curriculum

Now the instructor will demonstrate how to set required-by dates in a curriculum.

Notes: _____




Demonstration: Setting Required-By Dates in a Curriculum

For this demonstration, you will search for a curriculum record and edit dates.

1. Navigate to **Learning Activities > Curricula**.
2. Search for and select a curriculum record in the LMS Training Domain. **NOTE:** You can look up the security domain by selecting the filter icon, or you can type **TRAIN** in the Security Domain field.
3. Select **Contents** from the Related area of the record. **NOTE:** If there are no items in the Contents tab, choose another curriculum record.
4. Select **Manage Content**.
5. Locate the item to modify and select the **Edit** link.
6. In the **Initial Assignments** section, enter an initial number (30).
7. Select **days** as initial period.
8. The **Event** radio button should already be selected for initial basis.
9. In the **Retraining Assignments** section, enter a retraining number (90).
10. Select **days** as the retraining period.
11. The **Event** radio button should already be selected for initial basis.
12. Check the box for **Ignore Previous Completions Older Than __ Days**.
13. Enter **30** for the number of days. **NOTE:** This prevents users from doing the retraining assignment immediately after the initial one.
14. Select **Apply Changes**.
15. Close the Pop-up Window.

Notes: _____



Activity

Activity #4: Setting Required-By Dates Within a Curriculum
System Practice

TMS VA

The slide features a graphic of interlocking gears and orange cubes with various icons. A blue banner at the bottom contains the TMS VA logo.

Slide 43: Activity #4: Setting Required-By Dates within a Curriculum

Activity #4: Setting Required-By Dates within a Curriculum

- Now you will have an opportunity to practice setting required-by dates on your own.
- Complete the steps for this activity on the next page.
- If you have any questions during the activity, send them to the instructor using the Chat feature.

Notes: _____



Activity #4: Setting Required-By Dates within a Curriculum

For this activity, you will search for a curriculum record and edit dates.

1. Navigate to **Learning Activities > Curricula**.
2. Search for and select a curriculum record in the LMS Training Domain. **NOTE:** You can look up the security domain by selecting the filter icon, or you can type **TRAIN** in the Security Domain field.
3. Select **Contents** from the Related area of the record. **NOTE:** If there are no items in the Contents tab, choose another curriculum record.
4. Select **Manage Content**.
5. Locate the item to modify and select the **Edit** link.
6. In the **Initial Assignments** section, enter an initial number (30).
7. Select **days** as initial period.
8. The **Event** radio button should already be selected for initial basis.
9. In the **Retraining Assignments** section, enter a retraining number (90).
10. Select **days** as the retraining period.
11. The **Event** radio button should already be selected for initial basis.
12. Check the box for **Ignore Previous Completions Older Than __ Days**.
13. Enter **30** for the number of days. **NOTE:** This prevents users from doing the retraining assignment immediately after the initial one.
14. Select **Apply Changes**.
15. Close the Pop-up Window.

Notes: _____

Which of the following initial dates may be used by the system when using Event Basis?



Choose all that apply:

- a) Assignment date of the curriculum
- b) First day of the month
- c) Hire date
- d) Learning History completion date

KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature.

Which of the following initial dates may be used by the system when using Event Basis?

Choose all that apply:


- a) Assignment date of the curriculum
- b) First day of the month
- c) Hire date
- d) Learning History completion date

Slide 44: Knowledge Check

Notes: _____

An item must be placed in a curriculum if it is to be completed on a recurring basis.

- a) True
- b) False



KNOWLEDGE CHECK

Slide 45: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

True or False:


An item must be placed in a curriculum if it is to be completed on a recurring basis.

- a) True
- b) False

Which of the following can be selected as an assignment type for an item in TMS?

Choose all that apply:

- a) Alternative
- b) Required
- c) Recommended
- d) Optional



KNOWLEDGE CHECK

Slide 46: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

Which of the following can be selected as an assignment type for an item in TMS?

Choose all that apply:

- a) Alternative
- b) Required
- c) Recommended
- d) Optional

Notes: _____



Slide 47: Questions?

Questions?

If you have any questions about the material covered so far, please ask them using the chat feature at this time.

Notes: _____

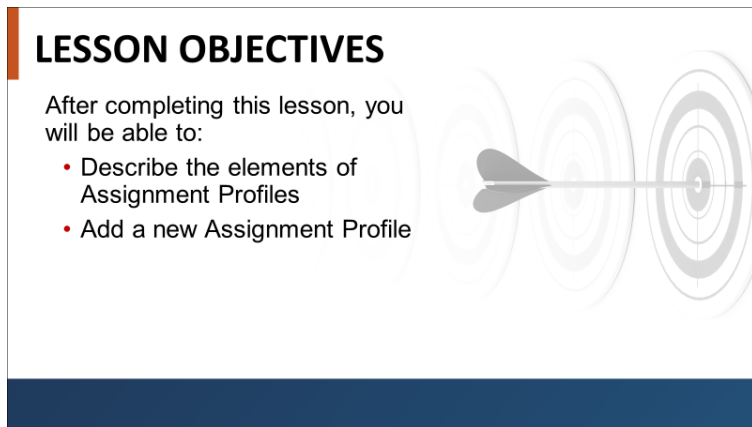
2.4 Lesson 3: Assignment Profiles



Slide 48: Lesson 3: Assignment Profiles

Lesson 3: Assignment Profiles

Session 1 of the DMLM course discusses manual assignment methods. This lesson builds on that content by reviewing automatic assignment methods.



Slide 49: Lesson 3 Objectives

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Describe the elements of Assignment Profiles
- Add a new Assignment Profile

Notes: _____

Methods of Assigning Learning

	Free-Floating Items	Curricula	Batch Assign?	Automatic Assignment?
User Record	Yes (Learning Plan; no retraining)	Yes (Curricula tab or Learning Plan)	No	No
Manage Assignments	Yes	Yes	Yes (1 time)	No
Job Codes	No	Yes	Yes	Yes
Assignment Profiles	Yes	Yes	Yes	Yes

Slide 50: Methods of Assigning Learning

Methods of Assigning Learning

There are both manual and automated methods to assign learning in the VA TMS. This lesson focuses on one of the automated methods of assigning learning to users.

- User Records: Free-Floating items, Curricula, and Batch Assignments
- Manage Assignments: Free-Floating items, Curricula, Batch Assignments
- Job Codes: Curricula, Batch Assignments, and Automatic Assignments
- Assignment Profiles: Free-Floating Items, Curricula, Batch Assignments, and Automatic Assignments

Assignment Profile

An Assignment Profile uses the common attributes of a group of users to assign curricula and items.

Key terms for assignment profiles:

- Groups
- Attributes
- Operator
- Value

Slide 51: Assignment Profile

Assignment Profile

An Assignment Profile provides a way to automate assigning curricula and items to a group of users who share the same training needs. The Assignment Profile uses the common attributes of a group of users to assign learning. Competency profiles, user roles, plans, and libraries may also be assigned using Assignment Profiles.

Notes: _____

Attributes

Assignment Profiles are used to define, by attributes, groups of users for the purpose of making assignments. Attributes include:

- Job position
- Organization
- Employee type
- Supervisory level
- Hire date

Slide 52: Attributes

Groups, Rules, and Attributes

- For each Assignment Profile, one or more groups of attributes may be created.
- Each group contains a set of rules, which are made up of attributes, operators, and values.
- A user's attributes must match one value from each of the attributes in any one group in order for the user to be assigned the curricula in the assignment profile.

Slide 53: Groups, Rules, and Attributes

Attributes

Assignment Profiles are used to define, by attributes (not by name), groups of users for making assignments. The power of an Assignment Profile is that, since it identifies users by their attributes, it automatically includes or excludes users as their attributes change.

Groups, Rules, and Attributes

For each Assignment Profile, one or more groups may be created. Each group contains a set of rules. A user's attributes must match one value from each line item in the defined rule and reside in one of the selected security domains in order for the user to be assigned the curricula in the Assignment Profile.

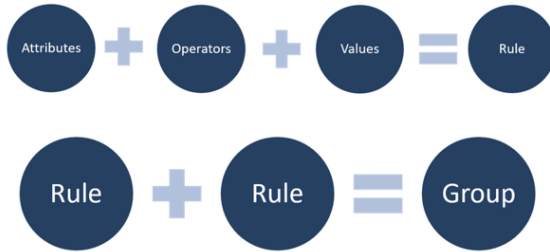
Once an attribute has been added to a rule, the specific values for the attribute must also be added, as well as an operator. An operator is an action term selected to restrict these values.

Operators include:

- Contains/Does Not Contain
- Starts With/Does Not Start With
- Matches/Does Not Match
- Is Empty/Is Not Empty

Notes: _____

Groups, Rules, and Attributes (cont'd)



Slide 54: Groups, Rules, and Attributes (cont'd)

Groups, Rules, and Attributes (cont'd)

Rules consist of operators, attributes, and values. Groups consist of rules.

Profile Attributes

Example of assigning users to an Assignment Profile with the following attributes:

- **Job Code:** Sales; **Hire Date:** On or before 1/1/12



Slide 55: Profile Attributes

Profile Attributes

One group creates an **AND** relationship. Two groups create an **OR** relationship.

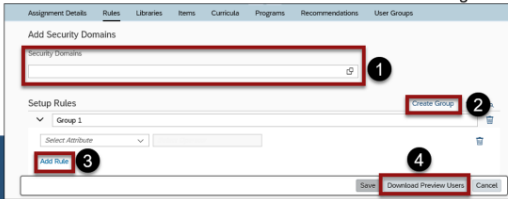
In our scenario displayed on the slide, we have two rules 1) user job code equals sales and 2) user hire date is on or before 01/01/2012

If both rules are placed in one group, and **AND** relationship is formed. This yields a smaller number of qualifying users. If each rule is placed in its own group, an **OR** relationship is formed. This yields a higher total number of qualifying users.

Notes: _____

How to Set Up Rules

1. Add Security Domain(s).
2. Create Group(s).
3. Create Rule(s) by selecting an attribute, operator, and value.
 - Rules in the same group create an AND relationship.
 - Adding a new group creates an OR relationship.
4. Select Download Preview Users to view which users match the assignment profile's criteria.



Slide 56: How to Set Up Rules

How to Set Up Rules

1. Add Security Domain(s).
2. Create Group(s).
3. Create Rule(s) by selecting an attribute, operator, and value.
 - Rules in the same group create an AND relationship.
 - Adding a new group creates an OR relationship.
4. Select Download Preview Users to view which users match the assignment profile's criteria.

Associating Learning

- Curricula and Items are added to the Assignment Profile from the Curricula tab or Items tab in the Related area.
- To “push” the curricula or items out to users who currently match the assignment profile criteria, select **Execute Changes** in the Actions area. Manual execution only needs to be done when the Assignment Profile is initially created or if the domains or attributes change.

Slide 57: Associating Learning

Associating Learning

Curricula and items are added to the Assignment Profile from the Curricula or Items tab from the Related area of the Assignment Profile record. Multiple curricula or items can be assigned through a single Assignment Profile if needed.

To “push” the curricula or items out to users who currently match the assignment profile criteria, select Execute Changes in the Actions area. This only needs to be done when the Assignment Profile is initially created or if the security domains or attributes change.

Notes: _____

Other Things to Associate via APs

- **Libraries:** Users must have access to a library to see its items
- **Programs:** Mass assigns program(s) to many users at once
- **Recommendations:** Recommend items to certain users to appear on their home pages

Slide 58: Other Things to Associate via APs

Other Things to Associate via APs

Other things that can be associated via assignment profiles include:

- **Libraries:** Users must have access to a library to see the items in it
- **Programs:** Mass assigns program(s) to many users at once
- **Recommendations:** Recommends items to certain users to appear on their home pages

Automatic Process Manager (APM)

- Any time an Assignment Profile is created or changed, you must execute changes through a background job before it can be synchronized through the automatic process.
- Assignment Profiles that do not Execute Changes are skipped during the APM process.

Slide 59: Automatic Process Manager (APM)

Automatic Process Manager (APM)

Administrators with the Assignment Profile Manager role set up Assignment Profiles in the VA TMS and configure the Automatic Process Manager to periodically update them by running through new and changed user attributes to sort users according to their profile.

For example, you can configure an Assignment Profile that includes all users in a particular city. The system looks for the city attribute of the user and assigns all matching users to the new Assignment Profile. When adding or changing an Assignment Profile, you must execute changes, meaning that the system runs through all user records to find users in a matching city to put in the new Assignment Profile.

Execute Changes and Update Users and Assignments are two different processes. Any time an Assignment Profile is created or changed, Execute Changes must be performed. Then, the Assignment Profile

Notes: _____

record will be updated through the automatic process. Assignment Profiles that are not executed are skipped during the Assignment Profile update process.

Update Users and Assignments

- The system allows you to update an Assignment Profile only after you have selected Execute Changes.
- When you select Update Users and Assignments from the Actions area, you can schedule the job to run immediately or in the background rather than wait for APM.

Slide 60: Update Users and Assignments

Update Users and Assignments

When and why would you update an Assignment Profile?

Let's say that you just added ten new user records for individuals who are starting with your organization today. If they log in to the user interface, they have no items in their To-Do List and no access to any libraries. For all new hires, however, your company wants them to take "New Hire" orientation training and has created a "New Hire" Assignment Profile that includes all new hires. In this situation, you could access the "New Hire" Assignment Profile and select **Update Users and Assignments** in the Actions area. If you run the job immediately, new hires can log in to the user interface and access orientation training on their first day of employment.

The system allows you to update an Assignment Profile only after you have executed changes. When you select Update Users and Assignments, you can schedule the job to run immediately or in the background. When the job runs, the system performs the Assignment Profile automatic update process, but only for this Assignment Profile.

Notes: _____



Slide 61: Demonstration: Add a New Assignment Profile

Demonstration: Add a New Assignment Profile

Now the instructor will demonstrate how to add a new Assignment Profile in the VA TMS.

Notes: _____



Demonstration: Add a New Assignment Profile

To Add a New Assignment Profile:

1. Navigate to Manage User Learning > Assignment Profile.
2. Select **Add New**.
3. Enter an **Assignment Profile ID** (TRA-YourInitials-Today'sDate).
4. Enter a **Description** (Test).
5. Enter a **Security Domain** (TRAIN).
6. Enter a **Contact E-mail Address** for the person responsible for the Assignment Profile.
NOTE: The **Created For** field is optional and identifies the person who requested the Assignment Profile to be created. You can also enter applicable **Notes** as needed.
7. Select **Add**.

To Set Up Rules for an Assignment Profile:

1. Select the **Rules** tab in the Related Area.
2. In the Security Domains section, select the **Add Security Domain(s) icon**.
3. Select **Search** in the popup window.
4. Check the box for the **LMS Training Domain** in the Top Level Only column.
5. Select **Add**.
6. In the **Setup Rules** section, select **Create Group**.
7. Enter **Group 1** in the Enter Group Name field.
8. Select **Is Full-Time** from the Attribute dropdown menu.
9. Select **Equals** from the Operator dropdown menu.
10. Select **Yes** from the Value dropdown menu.
11. Select **Add Rule** to populate a new rule row. **NOTE:** When you add more than one rule to the same group, you are establishing an **AND** relationship.
12. Select **Hire Date** from the Attribute dropdown menu.
13. Select **On or Before** from the Operator dropdown menu.

Notes: _____

14. Select the **calendar icon** in the Value field to select a random date on the calendar.
15. Select **Save**.
16. Select **Create Group** to add a new group. **NOTE:** When you create another group, you are establishing an **OR** relationship.
17. Enter **Group 2** in the Enter Group Name field.
18. Select **VA State** from the Attribute dropdown menu.
19. Select **Matches** from the Operator dropdown menu.
20. Select the **icon** in the Value field in order to check the box next to a state. Select **Add**.
21. Select **Save**. **NOTE:** When you select **Download Preview Users**, it will generate an Excel report that shows which users currently match the assignment profile's criteria.

To Add Learning to an Assignment Profile:

1. Select the **Curricula** tab.
2. Select **Add New Curricula** (plus sign icon).
3. Search for **TRAIN** in the Security Domain field. Select a curriculum record in that security domain by checking the box and selecting **Add**.
4. In the Actions area, select **Execute Changes**. **NOTE:** In the Core Area, it reminds you to execute changes in yellow.
5. Select the Run this job immediately, if allowable radio button.
6. Uncheck the Notify via email upon completion checkbox.
7. Select **Finish**.
8. Select the **Back to Assignment Profile** button. **NOTE:** In the Core Area, it timestamps when you executed changes in green. Also, when you select Actions, Execute Changes is no longer available since the Rules have not been changed.
9. In order to demonstrate the next feature, you must refresh the assignment profile record. You can accomplish this by navigating to another record in Recents, then returning to the assignment profile record, which is also listed in Recents.
10. In the Actions area, select **Update Users and Assignments**.

Notes: _____

11. Select the Run this job immediately, if allowable radio button.
12. Uncheck the Notify via email upon completion checkbox.
13. Select **Finish**.
14. Select the **Back to Assignment Profile** button. **NOTE:** In the Core Area, it timestamps when you updated users and assignments in green.

Notes: _____



Activity

Activity #5: Add a New Assignment Profile

System Practice



Slide 62: Activity #5: Add a New Assignment Profile

Activity #5: Add a New Assignment Profile.

- Now you will have an opportunity to practice working with assignment profiles on your own.
- Complete the steps for this activity on the next page.
- If you have any questions during the activity, send them to the instructor using the Chat feature.

Notes: _____



Activity #5: Assignment Profile

To Add a New Assignment Profile:

1. Navigate to Manage User Learning > Assignment Profile.
2. Select **Add New**.
3. Enter an **Assignment Profile ID** (TRA-YourInitials-Today'sDate).
4. Enter a **Description** (Test).
5. Enter a **Security Domain** (TRAIN).
6. Enter a **Contact E-mail Address** for the person responsible for the Assignment Profile.
7. Select **Add**.

To Set Up Rules for an Assignment Profile:

1. Select the **Rules** tab in the Related Area.
2. In the Security Domains section, select the **Add Security Domain(s) icon**.
3. Select **Search** in the popup window.
4. Check the box for the **LMS Training Domain** in the Top Level Only column.
5. Select **Add**.
6. In the **Setup Rules** section, select **Create Group**.
7. Enter **Group 1** in the Enter Group Name field.
8. Select **Is Full-Time** from the Attribute dropdown menu.
9. Select **Equals** from the Operator dropdown menu.
10. Select **Yes** from the Value dropdown menu.
11. Select **Save**.
12. Select **Create Group** to add a new group.
13. Enter **Group 2** in the Enter Group Name field.
14. Select **VA State** from the Attribute dropdown menu.
15. Select **Matches** from the Operator dropdown menu.
16. Select the **icon** in the Value field in order to check the box next to a state. Select **Add**.

Notes: _____


17. Select **Save**.

To Add Learning to an Assignment Profile:

1. Select the **Curricula** tab.
2. Select **Add New Curricula** (plus sign icon).
3. Search for **TRAIN** in the Security Domain field. Select a curriculum record in that security domain by checking the box and selecting **Add**.
4. In the Actions area, select **Execute Changes**. **NOTE:** In the Core Area, it reminds you to execute changes in yellow.
5. Select the Run this job immediately, if allowable radio button.
6. Uncheck the Notify via email upon completion checkbox.
7. Select **Finish**.
8. Select the **Back to Assignment Profile** button. **NOTE:** In the Core Area, it timestamps when you executed changes in green. Also, when you select Actions, Execute Changes is no longer available since the Rules have not been changed.

Notes: _____

What is the name of the process to initially push out the associated learning to the users?



- a) Update User and Assignments
- b) Libraries
- c) Recommendations
- d) Execute Changes

KNOWLEDGE CHECK

Slide 63: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

What is the name of the process to initially push out the associated learning to the users?

- a) Update User and Assignments
- b) Libraries
- c) Recommendations
- d) Execute Changes

QUESTIONS?



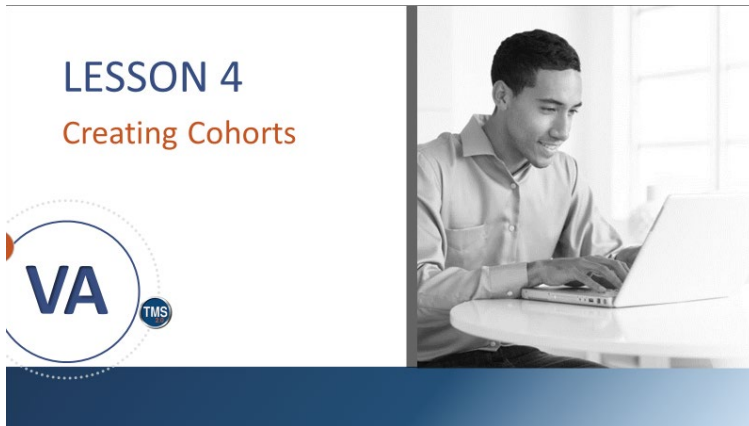
Slide 64: Questions?

Questions?

If you have any questions about the material covered so far, please ask them using the chat feature at this time.

Notes: _____

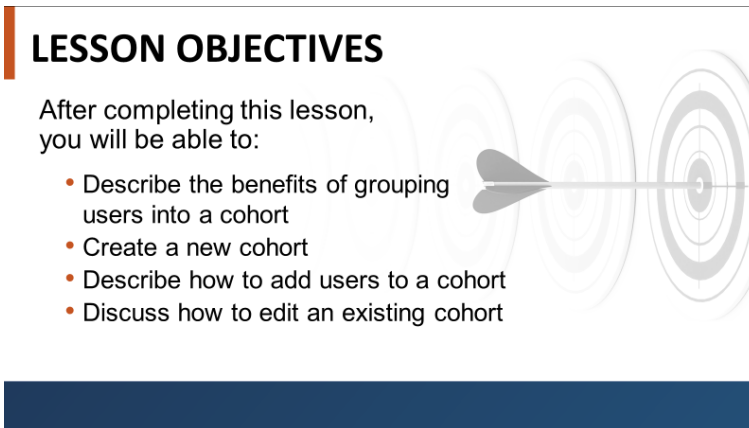
2.5 Lesson 4: Creating Cohorts



Slide 65: Lesson 4: Creating Cohorts

Lesson 4: Creating Cohorts

Now that we have created an assignment profile, an automatic assignment method, Lesson 4 will cover how to create a cohort, which is a manual assignment method.



Slide 66: Lesson 4 Objectives

Lesson 4 Objectives

After completing this lesson, you will be able to:

- Describe the benefits of grouping users into a cohort
- Create a new cohort
- Describe how to add users to a cohort
- Discuss how to edit an existing cohort

Notes: _____

Cohorts Defined

Cohorts are generally used as a grouping tool for users who go through a common set of classes. Creating, maintaining, and deleting cohorts is a **manual** (not automatic) process.

Creating a cohort makes it easier to:

- Generate group reports
- Schedule groups

Slide 67: Cohorts Defined

Cohorts Defined

Cohorts are generally used as a grouping tool for users who go through a common set of classes. When you use a cohort, group reporting and group scheduling are easier for those who need to attend the same classes. A cohort is created to schedule all group members and to produce reports on their achievements.

Creating, maintaining, and deleting cohorts are manual processes that must be completed by the admin. They are not automatically generated by the VA TMS.

While cohorts generally include a list of users with related classes, you can have one without the other. For example, you can add classes to a cohort and add users later, or you can add users to a cohort and later add the class.

Slide 68: Demonstration: Creating a Cohort

Demonstration: Creating a Cohort

Now the instructor will demonstrate how to create a cohort.

Notes: _____



Demonstration: Creating a Cohort

Create a Cohort:

1. Go to **People > Cohorts > Add New**.
2. Enter a **Cohort ID** (TRA-Your Initials-Today's Month and Day). **NOTE:** The VA currently requests a specified naming convention for cohorts. The first part of the ID is the three or four-character security domain ID, followed by a hyphen. The next part is a three-digit, sequential number. *You must perform a search each time to find the next number to use.* This 3-digit number must change each time the course is taught. If not, the record will already exist.
3. Enter **Training Cohort** as the **Description**.
4. Enter **TRAIN** in the **Security Domain ID** field.
5. Explain that Curriculum is not mandatory. Typically, admins will build a curriculum for the cohort first and then search for it on this page. However, for this demonstration, choose an existing curriculum within the TRAIN domain.
6. Leave **Max Size** blank.
7. Select a **Start Date** and **End Date**. Use today's date for the start date and one year out for the end date.
8. Select **Add**.

Add Users to a Cohort:

1. From the Cohort record, select the **Users** tab.
2. Select **Add one or more from list**.
3. Enter **dmlmuser** in the User ID field and select **Search**.
4. Select the checkbox(es) of the User(s) you want to add to the cohort.
5. Select the **Add** button.

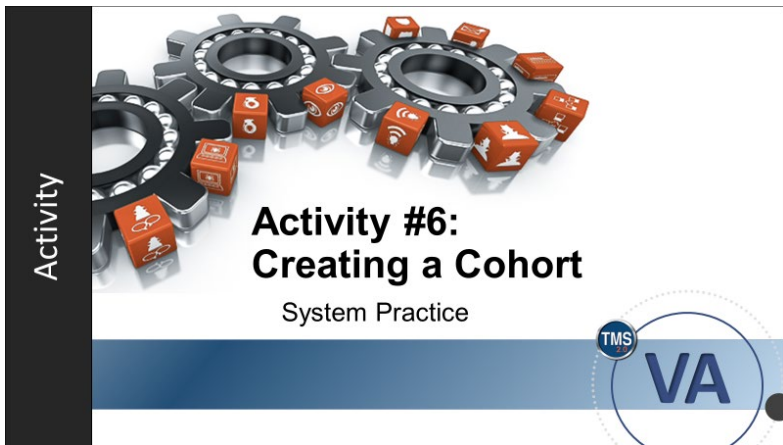
Edit a Cohort:

1. Navigate to **People > Cohorts**.

Notes: _____

2. Enter search criteria for the cohort you just created. Select **Search**.
3. Select the **edit icon** (e.g., pencil) next to your cohort.
4. Enter a **Max Size** of 30.
5. Select **Apply Changes**.

Notes: _____



The slide features a graphic with three interlocking gears. The gears are grey and orange, with various icons on them. Below the gears, the text reads "Activity #6: Creating a Cohort" in a bold, black font, followed by "System Practice" in a smaller font. A blue horizontal bar at the bottom contains the "TMS VA" logo, which includes a circular "TMS" icon and the letters "VA" in a large, blue font.

Slide 69: Activity #6: Creating a Cohort

Activity #6: Creating a Cohort

- Now you will have an opportunity to practice creating a cohort on your own.
- Complete the steps for this activity on the next page.
- If you have any questions during the activity, send them to the instructor using the Chat feature.

Notes: _____



Activity #6: Creating a Cohort

Create a Cohort:

1. Go to **People > Cohorts > Add New**.
2. Enter a **Cohort ID** (TRA-Your Initials-Today's Month and Day). **NOTE:** The VA currently requests a specified naming convention for cohorts. The first part of the ID is the three or four-character security domain ID, followed by a hyphen. The next part is a three-digit, sequential number. *You must perform a search each time to find the next number to use.* This 3-digit number must change each time the course is taught. If not, the record will already exist.
3. Enter **Training Cohort** as the **Description**.
4. Enter **TRAIN** in the **Security Domain ID** field.
5. Explain that Curriculum is not mandatory. Typically, admins will build a curriculum for the cohort first and then search for it on this page. However, for this demonstration, choose an existing curriculum within the TRAIN domain.
6. Leave **Max Size** blank.
7. Select a **Start Date** and **End Date**. Use today's date for the start date and one year out for the end date.
8. Select **Add**.

Add Users to a Cohort:

1. From the Cohort record, select the **Users** tab.
2. Select **Add one or more from list**.
3. Enter **dmlmuser** in the User ID field and select **Search**.
4. Select the checkbox(es) of the User(s) you want to add to the cohort.
5. Select the **Add** button.

Edit a Cohort:

1. Navigate to **People > Cohorts**.


Notes: _____

2. Enter search criteria for the cohort you just created. Select **Search**.
3. Select the **edit icon** (e.g., pencil) next to your cohort.
4. Enter a **Max Size** of 30.
5. Select **Apply Changes**.

Notes: _____

Creating, maintaining, and deleting cohorts is an automated process within the VA TMS.

- a) True
- b) False



KNOWLEDGE CHECK

Slide 70: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

Creating, maintaining, and deleting cohorts is an automated process within the VA TMS.

- a) True
- b) False

QUESTIONS?



Slide 71: Questions?

Questions?

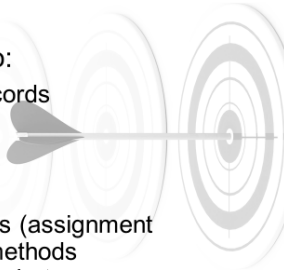
If you have any questions about the material covered so far, please ask them using the chat feature at this time.

Notes: _____

SESSION SUMMARY

In this session, you learned how to:

- Manage user and administrator records
- Merge user records
- Set up an initial-based event curriculum
- Use automatic assignment methods (assignment profiles) and manual assignment methods (cohorts) to assign items and curricula to users



Slide 78: Session 4 Summary

Session 4 Summary

This concludes Session 4. You should now be able to:

- Manage user and administrator records
- Merge user records
- Set up an initial-based event curriculum
- Use automatic (assignment profiles) and manual (cohorts) assignment methods to assign items and curricula to users

QUESTIONS?



Slide 79: Questions?

Questions?

If you have any questions about the material in the session, please ask them using the chat feature at this time.

Notes: _____

Additional Resources

- TMS Resource Site: <https://www.hcsc.va.gov/>
 - Job Aids
 - Participant Guides for each session
- TMS Administrators Community of Practice (COP)
 - For more information: VATMSCoP@va.gov
- Help Desk
 - 1-855-673-4357
- Dr. Bashshar: Clarence.Bashshar@va.gov

Slide 80: Additional Resources

Additional Resources

Here are some additional TMS resources to use if needed.

- TMS Resource Site:
<https://www.hcsc.va.gov/>
- TMS Administrators Community of Practice (COP): gain access through emailing
VATMSCoP@va.gov
- Help Desk: 1-855-673-4357
- Clarence.Bashshar@va.gov

Note: Once you receive your admin roles for the TMS Production Environment, you will be able to log in to TRAIN with your regular TMS credentials and maintain the same roles. This can be very helpful in case you need to test anything before you create it or work with it in the live TMS.

Notes: _____

3.0 Appendix

3.1 Appendix A: VA TMS Key Terms

Term	Definition
Administrator	An administrator is a person that has been granted special privileges for and an account in the Admin URL of the VA TMS. While we use the same Admin ID for these administrative accounts as was used for the User ID on the User URL, the two accounts are not connected in any way.
Assessment	An Assessment is a portion of an online item that contains an examination or quiz. One or more assessments can be included in an online item, so that a single online item may be composed of several assessments. Assessments may be grouped, along with content objects, into one or more groups (called folders) within the same online item. Exams are a critical way to measure users' completion of learning content.
Content Object	Content objects are hyperlinks that point to online content that resides on a website outside of the TMS. They are the building blocks of online Items. Most of the material in the TMS is delivered to the user via a content object.
Curricula	<p>Curricula are building blocks for managing learning activities. Curricula allow groupings of all number of learning requirements together into one unit and track the completion of that required learning as a unit.</p> <p>Based on the learning history of the user, a curriculum shall have one of two statuses:</p> <ul style="list-style-type: none"> • Complete: indicating that all of the Items and sub-curricula of the Curriculum have been completed in the required by date has not been exceeded. • Incomplete: indicating that either one or more Items in this curriculum, or one of its sub-curricula, have not been completed and the required by date has been exceeded. <p>Each item within a curriculum shall have either no retraining interval associated with it (indicating that retraining on this item is not required) or shall have a number of days in the retraining interval, indicating a periodic retraining need for that particular Item.</p>

Term	Definition
	An Item can also be optional, which means that the completion status on an optional item may not affect the curriculum status of the User.
Custom Reports	Custom reports allow VA to create customized reports specific to VA. The reports the VA develops are then easily run in the TMS.
Days Remaining	Number of days remaining before the expiration of the required-by date for completing a specific item.
Delivery Method	The instructional method used to deliver learning. Examples might include instructor-led training, computer-based training, on-the-job training, and self-study. However, delivery methods are defined by the VA to suit our specific needs. The creation and assignment of delivery methods also helps to speed up searches and queries.
Document	Any type of media (manual, regulation, etc.) for which a record has been created, enabling it to be tracked by the TMS Administration. Documents are associated to Items, to curricula, and/or to tasks.
Document Type	Document types are categories the VA has set up for the printed materials used in training documents, based upon VA needs. The assignment of document types helps to speed up searches and queries. VA TMS provides the capability to associate documents such as regulations, policy/procedure documents, and reference materials with an Item. The Document Type field contains categories that allow all documents to be grouped into logical areas. VA will also use the Documents tab to attach hyperlinks to course detail information for some Items. The list of Document Types for the VA TMS is:

Term	Definition
	<ul style="list-style-type: none"> • Description: Specific VA Learning library document containing additional information • Link to Web: Hyperlink to supportive website • Link to Conference Site: Hyperlink to conference website • Link to Evaluation and Certificate: Hyperlink to website containing online evaluation and certificate • Link to Registration: Hyperlink registration website or form • Pocketcard: An electronic document of a pocketcard which typically contain reference information and are usually small. • Brochure: Document containing specific accreditation information and program information • Registration: Registration information and/or form • Announcement/Flyer: Promotional Material • Instructions for Travelers: Specific travel information for travelers • Instructions for Use: Implementation, information comma and suggestions for local use • Handout: Handouts that support the educational opportunity • Policy/Regulation: VA policy or regulation • Scantron Instructions: Instructions for completing Scantron form • Ordering Instructions • Evaluation Guide: Detailed information on how to evaluate program and can also include evaluation questions for scantron form.

Term	Definition
Effective Date	The effective date is the date when a new or revised Item will be used for the calculation of item completion statuses and curriculum statuses. It is set as part of the Item record that will be included in a curriculum; the default date is the current date; but a future date may be set so that a User's curriculum status does not change to “incomplete” when the item is added.
	By making the effective date a future date, a “grace period” is allowed for users to complete the new Item in the time allotted, without affecting their “complete” curriculum status. During the grace period before the effective day, the Item appears on the learning plans of all users to whom the curriculum has been assigned.
Facility	A facility is a grouping of training locations. Facilities may be buildings, plants, branch locations, or some other way that makes sense for the VA to group locations.
Manager	A manager is a user that has been designated to oversee another user's learning. A manager has the ability to log in to the TMS user access on behalf of their direct reports, and to view their direct reports' learning information and assign learning to them. They can also record learning events for their users.
Reserved Seat	A reserved seat is a reservation made by an organization for registrations in a class. Names of specific users may not be available when the organization acquires reserved seats, but at some point, names of users who belong to the organization that acquired the reserved seats can be supplied. Reserved seat requests are recorded using the Seat Reservations tab in the class record or by using the Registration Assistant tool in the user record.

Term	Definition
Security Domain	<p>The VA TMS is organized in accordance with the current VA organizational chart. For example, each VACO staff and program office, VHA VAMC, VHA VISN, VBA regional office, NCA MSN is a separate entity in the TMS called a “ security domain.” In VA TMS, security domains are used to manage users, administrators, courses (Items), libraries, facilities and locations.</p>
	<p>Currently, there are over 300 security domains in VA TMS, grouped in accordance with the VA organizational chart. Within VACO, there are several security domains, each of which is a training management unit in the VA TMS.</p>
Time Slots	<p>Unit of division of a course offering based on duration that facilitates variable resource scheduling. For example, a 40-hour course can be scheduled in any of the following ways:</p> <ul style="list-style-type: none"> • Divide it into five 8-hour time slots, scheduled one time slot per day for five days • Divided into ten 4-hour time slots, scheduled two time slots per day for five days, or into four 10-hour time slots, scheduled one per day for four days • Divided into any number of time slots of uniform or varying duration, scheduled over a period of days in order to fit the particular circumstances <p>Thus, the TMS gives VA flexibility, which allows a course that meets first for a two- hour time slot in an auditorium to be scheduled, then for three-hour time slot in a classroom, even though the time slots may have completely different instructor and resource requirements.</p>

Term	Definition
Sequence Number	A sequence number indicates the order in which the items in the curriculum will be scheduled by the system. It is the order the User is expected to take the assigned items in the curriculum. For online items the system will not prevent a User from taking the items out of the scheduled order (i.e. the user can take the items in any order).
Substitutes	A feature of the TMS that allows VA to indicate that the successful completion of a particular item also provides credit for another Item. The substitute is automatically entered by the TMS as a separate learning event for a given user when a learning event for the originating item is entered.
Task	A task is a discrete unit of work with a definite beginning and end, which can be performed in a relatively short period of time, and which results in one of the following: a finished product- a completed service- a change in the work environment. VA can create records for tasks, which can then be related to items, competences, to job positions, to job locations, and to documents. This results in greater visibility of the relationship between items and particular aspects of actual job performance (e.g., VA can keep track of the tasks that are covered by an on-the-job training (OJT) guide and its associated job performance measure (JPM).

Term	Definition
Time Slots	<p>Unit of division of a course offering based on duration that facilitates variable resource scheduling. For example, a 40-hour course can be scheduled in any of the following ways:</p> <ul style="list-style-type: none"> • Divide it into five 8-hour time slots, scheduled one time slot per day for five days • Divided into ten 4-hour time slots, scheduled two time slots per day for five days, or into four 10-hour time slots, scheduled one per day for four days • Divided into any number of time slots of uniform or varying duration, scheduled over a period of days in order to fit the particular circumstances <p>Thus, the TMS gives VA flexibility, which allows a course that meets first for a two- hour time slot in an auditorium to be scheduled, then for three-hour time slot in a classroom, even though the time slots may have completely different instructor and resource requirements.</p>
User	<p>A User of the VA TMS includes all VA employees and staff (residents, volunteers, WOCs, students, contractors, and federal non-VA employees).</p>
	<p>Training will prepare all VA employees and staff to use the VA TMS to register for, access, and record training assignments. This training is intended to be delivered at the local level.</p>
Waitlist	<p>A list of users for whom no space currently exists in a class. VA can set up the TMS administration such that users can be moved automatically from the waitlist to a request list using the Waitlist to Request tool in the Automatic Processes subsection of System Admin.</p>

Term	Definition
Web Based	A website, online training, CD-ROM or other computer-based training. If an online course, the link will be found in the library details, if a CD-ROM, the information for obtaining this will be found in the description document.

3.2 Appendix B: VA TMS Records Naming Conventions

Type of Record	How to Name Record
Item	ALWAYS let the system assign the number. “Auto Generate” check box is already checked by VA business policy.
Class	ALWAYS let the system “auto generate” this number.
Document	Domain ID (Hyphen) Number of the document (3 digits) Example: DVA-001
Content Object	Domain ID (Hyphen) Item Type Item ID (Hyphen) Sequential number of the content object (2 digits) Examples: DVA-VA54321-01 DVA-VA54321-02 301-VA3456-01
Curriculum	Domain (Hyphen) Next available number (3 digits) Must perform a search to find next number. Example: NCA-020
Requirement	Domain (Hyphen) Next available number (3 digits) Must perform a search to find next number. Examples: DVA-001
Assignment Profile	Domain (Hyphen) CURR (4- letter abbreviation) (Hyphen) A short description of attributes being used to define the AP Example: IND-CURR-HazMat for Police
Cohort	Domain (Hyphen) Next available number (3 digits) Must perform a search to find next number. Example: EES-103

3.3 Appendix C: VA TMS Resources Naming Conventions

Type of Resource	How to Name Resource
Instructor	ALWAYS let the system “auto generate” this number.
Equipment	ALWAYS let the system “auto generate” this number.
Materials	Domain (Hyphen) Description Example: TUC-Books for CREW
Facilities	Domain (Hyphen) Description Example: STL-John Cochran
Locations	Domain (Hyphen) Description Example: STL-Auditorium

3.4 Appendix D VA TMS Functions and Associated Roles

VA TMS Admin Function	LM	DM	UM	IM	RM	SM	AM	APM	PRGM	CTLGM	HD	PR	QEM	CM	CIM	RPT	AHN	ACM	ACIM	MSE	MSEHD	LHIM	ISO
Unlock User Accounts	X										X	X										X	
Reset User Passwords	X										X	X										X	
Change Managers for a group of Users	X																						
Proxy into Users accounts	X										X												
Add/Remove Items to/from Learning Plan	X						X																
Add/Remove Curricula Assignments	X						X																
Record Item/External Event/Classes	X				X																		
Edit/Delete Recorded Learning Events	X				X																		
Merge User Records			X																				
Add/Edit Items	X			X																			
Add/Edit Curricula	X			X																			
Add/Edit Programs									X														
Add/Edit Class	X				X	X	X																
Send Email Notifications	X																X						
Add/Edit Classes	X					X																	
Register/unregister Users into a Class	X				X	X																	
Assign/Remove Competency Profiles to/from Users														X									
Assign/Remove Competencies to/from Users														X									
Manage Administrator Accounts		X																					
Add/Edit/Copy/Delete Assignment Profiles								X															
Edit User Preferred Accreditations	X										X							X					
Edit User Occupational Categories	X										X							X					
Add/Edit/Delete Libraries			X																				
Set Tier and Relance in Libraries										X													
Edit User Approval Role			X																				
Add/Edit Instructor & Change Instructor Role	X																						
Add/Edit/Delete Competencies														X									
Add/Remove Competencies from Items														X	X								
Add/Edit/Delete Competency Profiles														X									
Add/Edit/Delete Questions													X										
Add/Edit/Delete Assessments													X										
Assign/Remove Questions to/from Assessments													X										
Add/Edit/Delete Surveys	X												X										
Unassign a Survey from Users	X												X										
Add/Edit Accreditations																		X					
Apply Accreditations to Items																		X	X				
Create Deep Links			X	X		X												X			X		
Run various Standard and Custom Reports	X		X	X	X	X	X						X	X	X	X		X	X			X	
Import Learning History																							X
View User Learning History	X				X		X				X											X	X
Add/Edit/Delete Resources (Equip., Locat., Fac.)	X																						
View Self Enrolled User																				X	X		
Validate Self Enrolled User																				X			
Download Search Results	X			X	X	X	X	X			X	X		X	X			X	X		X		X
Legend											X	Stand Alone Role	X	Add-On Role									

NOTE: Green columns indicate add-on roles; white columns indicate stand-alone roles

Figure 1: VA TMS Functions and Associated Roles