VA TMS Domain Manager and Learning Manager Training

Virtual Instructor-Led Training

Participant Guide

Session 1 of 4

October 2020

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Table of Contents

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 1 of 4. Through discussions, demonstrations, and hands-on activities, this training teaches DM/LM responsibilities including creating a learning item, working with curricula and programs, creating substitutes and prerequisites, and revising an item.

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 courses are a prerequisite and must be completed **prior to attending** the DM/LM VILT sessions:

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

- VA TMS Training for Scheduling Managers (VILT or WBT)

- VA TMS Training for Assignment Managers (VILT or WBT)

- VA TMS Training for Registration Managers (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.

1.2 Participant Guide

There is a separate Participant Guide for each of the four DM/LM VILT sessions. This Participant Guide is for Session 1 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 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 in to 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 e-mail afterward.

1.6 Course Length

The tables below includes a list of all training lessons in the four DM/LM sessions, along with estimated times. Only Session 1 will be covered in today's training and Participant Guide.

Table 2: DM/LM Session 1 of 4 Lessons and Durations

Lessons	Estimated Time
Welcome and Introductions	15 minutes
Lesson 1: Create and Configure Items	55 minutes
Lesson 2: Curricula and Programs	70 minutes
Lesson 3: Substitutes and Prerequisites	30 minutes
Lesson 4: Item Revision Assistant	20 minutes

Total: 3 hours, 10 minutes

2.0 Domain Manager and Learning Manager Training: Session 1 of 4

2.1 Welcome and Introduction

Slide 1: System Login

System Login

Ten minutes before class begins, follow the instructions on the slide to log in to the TRAIN environment and dial into the Audio-VANTS line. Ask any questions you may have for the instructor using the chat feature in the chat session.
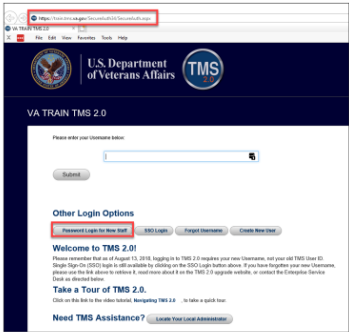
- **Train Environment Link:**
  - https://train.tms.va.gov/SecureAuth 34/
  - Select Password Login for New Staff
  - Enter your TRAIN Admin ID and Password

- **VANTS Line Audio:**
  - 1-800-767-1750
  - Access Code: 48596

Slide 2: VA TMS Domain Manager and Learning Manager Training: Session 1 of 4

Welcome

Welcome to Session 1 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.

Slide 3: Participant Introductions

Participant Introductions

Please use the chat feature to introduce yourself by sharing your name, including a nickname if applicable, and where you're located.

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.

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 ensure your audio is on mute.

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.

Slide 4: Course Structure
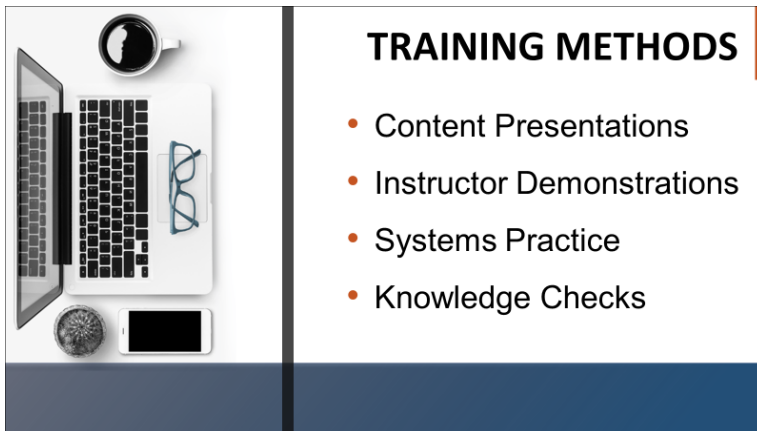
Course Structure

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

Talent Management System
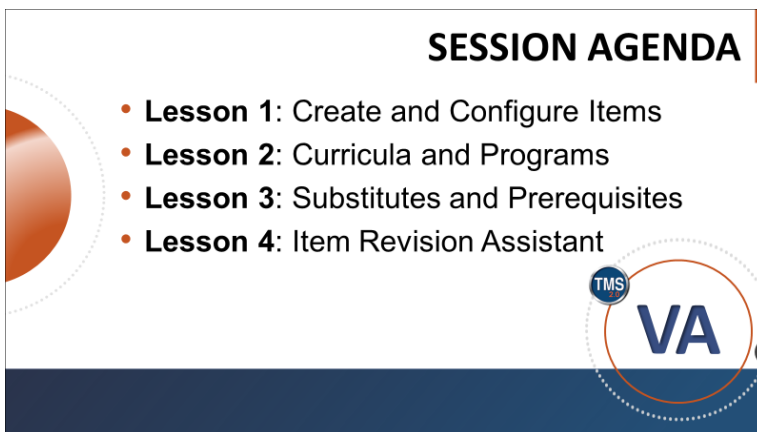
Human Resources & Administration

Slide 5: 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 and demonstrations and activities within the VA TMS.

- Instructor demonstrations: I 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 knowledge checks.

Slide 9: Session 1 Agenda

Session 1 Agenda

Today's session is organized into four lessons:

- Lesson 1: Create and Configure Items

- Lesson 2: Curricula and Programs

- Lesson 3: Substitutes and Prerequisites

- Lesson 4: Item Revision Assistant

Talent Management System

Human Resources & Administration

Slide 10: Session 1 Objectives

Session 1 Objectives

After completing this session, you will be able to:

- Create and configure items

- Create and configure curricula and programs

- Set up substitutes and prerequisites

- Use the item revision assistant

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: Create and Configure Items
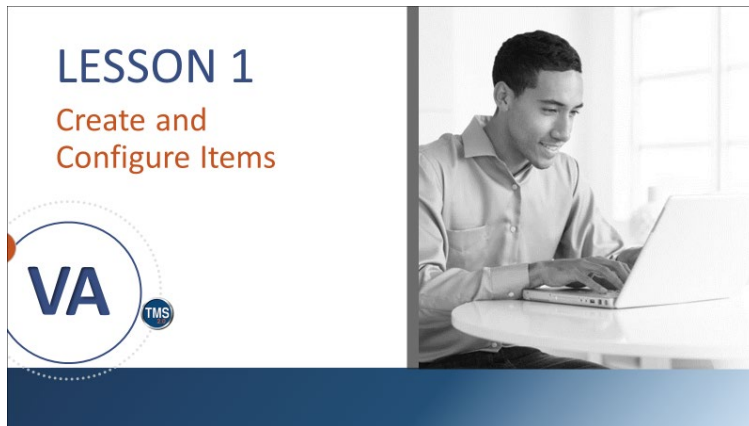
Slide 12: Lesson 1: Create and Configure Items

Lesson 1: Create and Configure Items

The goal for this lesson is to provide detailed information about items and how to add and work with them in the VA Talent Management System (VA TMS).
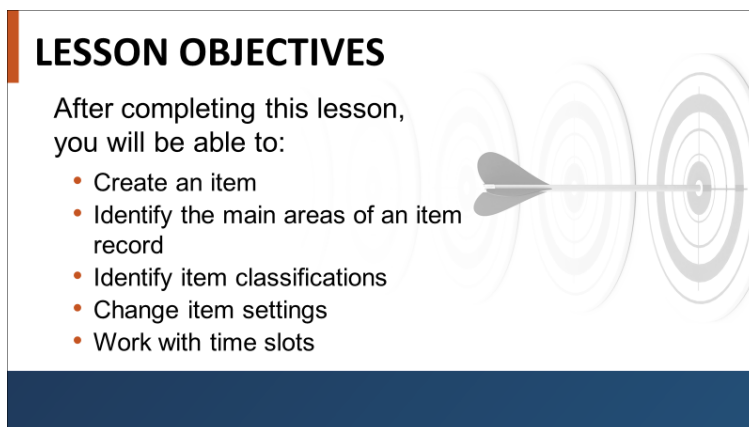
Slide 13: Lesson 1: Overview

Lesson 1 Objectives

After completing this lesson, you will be able to:

- Create an item

- Identify the main areas of an item record

- Identify item classifications

- Change item settings

- Work with time slots

Notes:_____

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Item

An item is the smallest assignable unit that can be tracked in the VA TMS. It may be a learning or non-learning activity. Examples of items include:

- Reading a standard operating procedure (SOP)
- Obtaining a commercial driver's license
- Obtaining an annual physical
- Attending a mandatory all-hands meeting
- Attending an instructor-led workshop

Slide 14: Item

Item

An item is a learning or non-learning activity that can be assigned, tracked and completed in the VA TMS. Items are usually thought of as "courses," however, they can be much more. Examples of non-course items include:

- Reading a standard operating procedure (SOP)

- Obtaining a commercial driver's license

- Obtaining an annual physical

- Attending a mandatory all-hands meeting

- Attending an instructor-led workshop

Adding an Item

- When creating a new item, use the Add New Learning Item process to enter key data
- When you complete the creation process and submit the data, the entered information displays in the item record

Slide 15: Adding an Item

Adding an Item

When creating a new item, use the **Add New Learning Item** wizard to enter key data. Required fields are indicated with a red asterisk. Required fields for items are configurable in your VA TMS.

When you complete the creation process and submit the data, the entered information displays in various sections and links of the item record.

Notes:_____

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Administration

Slide 16: Item Key

Item Key Parts

First, an item key needs to be established. The item key is a unique identifier in the database and is made up of three parts:

- Item type or reference

- Item ID

- Revision Date and Time

The key parts of an item include:

- **Item type (reference):** This is a globally defined reference that helps categorize items. When you create a new item, you must choose from the defined list. Subsequently, each "type" has an associated "completion status." This is an admin-defined reference used when recording a learning event.

- **Item ID:** This is a unique identifier for each item within the VA TMS database. The VA TMS uses the auto-generate ID feature and therefore administrators do not have to enter an Item ID.

- **Revision date/time stamp:** The system will default to the current date/time and version 1. The admin can manually override the data in these fields as needed.

An example of an item key, although not shown here on the screen, includes:

- COURSE Safety-100 07/01/2004 10:15 AM EST

Notes:_____

_____

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Slide 17: Item Classifications

Item Classifications

The VA TMS automatically classifies each item according to the following rules:

- **Instructor-led:** Item is put on a learning calendar, features resources and an instructor. May be broken up into segments.

- **Online:** Item features launchable online content.

- **Instructor-led with Online Content:** Item features qualities of Instructor-led Items and Online Items. Can contain segments and content objects.

- **Other:** Item tracks an activity performed outside of TMS that doesn't fit into the Scheduled or Online categories.

Slide 18: The Item Record

The Item Record

The item record is divided into three main areas:

- The Core area

- The Related area (takes up the entire bottom portion of the screen)

- The Actions area is within the core area (a dropdown menu at the top right portion of the screen)

Notes:_____
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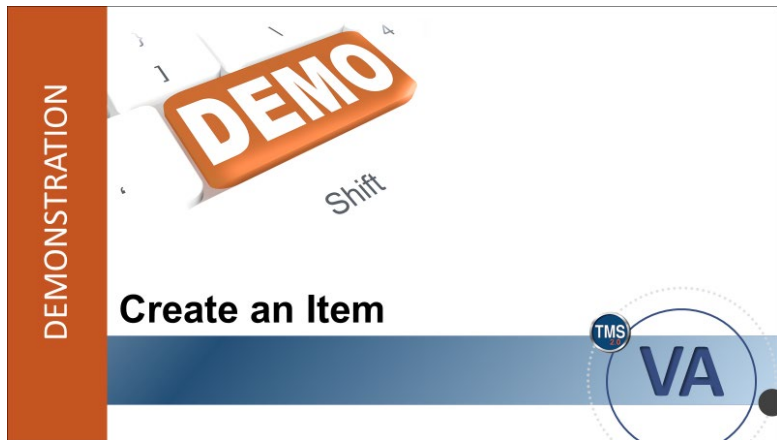
Slide 19: Demonstration: Create an Item

Demonstration: Create an Item

Now the instructor will demonstrate how to create an item and add information to the Item Record in the VA TMS.

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Demonstration: Create an Item

1. Navigate to **Learning Activities > Items**.

2. Select **Add New**.

3. Select an item type from the dropdown menu. (Department of Veterans Affairs (VA))

4. Ensure the **Auto Generate** checkbox is checked for **Item ID**.

5. Select a **security domain** for the item (TRAIN).

6. Select **Add**.

Review Core Area: The core area contains the basic information of the item record, including the Item Classification, Item Type, Revision number, date, and time, Status, and Cover Page Status.

Review Related Area: The Related area of the item record contains additional information regarding the item. Select each tab to review all of the information and settings available.

Item Details (Course Overview Section)

   Note: Notice there are many required fields here. To save any changes, all required fields must be completed.

1. Enter a **Title**.

2. Select a **Delivery Method**.

3. Select a **Source.**

4. Enter "0" for **Credit Hours**.

5. Enter "16" for **Learning Hours**.

6. Select the **Translate** button next to **Description**.

7. Enter a description in the body. After doing so, select **Save and Close**.

8. Enter an email in **Contact's Email**.

Notes:_____

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Access Settings Section

1. Max/Min Enrollments

2. Self-Registration/Manager Registration (If both are set to no, only an admin will be able to register users)

3. Enable users to waitlist

Course Ratings Section

1. Activate the **User can Rate** section.

Assignments Section

1. Choose an **Assignment Type**.

2. Select **Save.**

Review Actions Area: The Actions area of the item record contains links to additional actions that can be taken on the item record based on the item classification, including:

- Assign (initiates the Manage Assignments tool to enable you to batch assign items and curricula to one or more users)

- Schedule (create a class based on the item)

- Cover Page

- Send Email Notification (initiates the ad hoc notification wizard)

- AICC Export

- Revise (initiates the revisio wizard)

- Copy (opens the Copy Item window that allows you to copy the item)

- Delete (deletes the item)

- Clear Online Settings (change online settings back to default status)

Notes:_____
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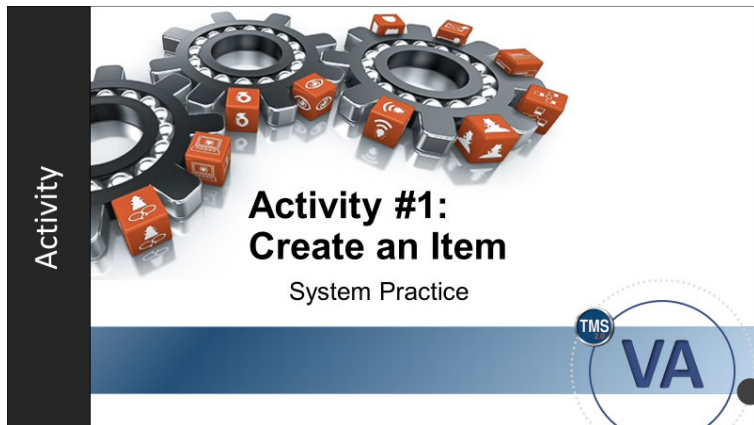
Slide 20: Activity #1: Create an Item

Activity #1: Create an Item

Now you will have an opportunity to practice creating an item on your own.

Please complete the steps for Activity #1 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.

Notes:_____

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Activity #1: Create an Item

Scenario: Your area is going to offer three new courses for new hires, and you have been asked to create the new items in the VA TMS. The three items are **New Hire Orientation**, **Departmental Policies,** and **Leading Through Example**. Use the information below for all three items. Navigate to **Learning Activities>Items>Add New** for each new Item.

1. The **item type** is Department of Veterans Affairs (VA).

2. Ensure the **Auto Generate** checkbox is checked for **Item ID**..

3. Place the items in the **TRAIN** security domain.

4. Select **Add.**

Item Details Tab

Course Overview Section

1. Use your initials in Item Title, followed by the name of the Item.

2. Choose a **Delivery Method** for each item (ex. Classroom, Virtual Classroom).

3. Choose a **Source** (ex. Adobe Captivate, Zoom Video Communications)**.**

4. Enter **0** for **Credit Hours.**

5. Enter **16** for **Learning Hours.**

6. Select the **Translate** button next to **Description** Enter a brief description in the pop-up window. When finished, select **Save and Close**.

7. Enter a **Contact's Email** (ex. johndoe@mail.gov).

Assignments Section

1. Choose **Required** from the **Assignment Type** dropdown menu.

2. Select **Save** at the bottom of the screen.

Notes:_____

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Fill In The Blank:

The three components of an Item Key are Item Type, _____, and Revision date and time.

KNOWLEDGE CHECK

Slide 21: Knowledge Check

Knowledge Check

Answer the following question using the chat feature:

Fill In The Blank: The three components of an Item Key are Item Type, _____, and Revision date and time.

When creating the Item record, you must select an Item Classification.

a) True

b) False

KNOWLEDGE CHECK

Slide 22: Knowledge Check

Knowledge Check

Answer the following question using the chat feature:

When Creating the Item record, you must select an Item Classification.

a) True

b) False

Notes:_____
_____
_____
_____

Time Slots

- A time slot is a block of time within a class primarily used for resource allocation
- If a user is registered in a class, he/she is registered in all time slots
- Time slots contain any applicable resources, such as locations, equipment, and instructors
- Can be configured for the item and for specific classes

Slide 23: Time Slots

Time Slots

A Time Slot is a block of time within a class primarily used for resource allocation. If a user is registered in a class, that user is registered in all time slots.

Time Slots contain any applicable resources such as locations, equipment, instructors, etc. needed for the specified timeframe. Resource assignment to a time slot is optional, but each class must have at least one time slot.

When a class is added to the VA TMS, it is created using the default time slot structure from the Agenda Template tab of the item record's Related area.

Editing Time Slots

- Time Slots can be set to have different durations, location types, and equipment from each other despite belonging to the same item

Description	Duration	Delay Start	Location Type
Day 1			
Working with Users and Items	5.00 hours		Auditorium (Auditorium)
Day 2			
Working with Curricula	3.00 hours		Classroom (Classroom)

Slide 24: Editing Segments

Editing Time Slots

Time Slots can be set to have different durations, location types, and equipment from each other despite belonging to the same item.

Changing the time slots within an Item record will affect all time slots in related class records. Settings can be adjusted for individual classes within the class record. Attendance in a time slot can only be recorded within the Class record.

Notes:_____
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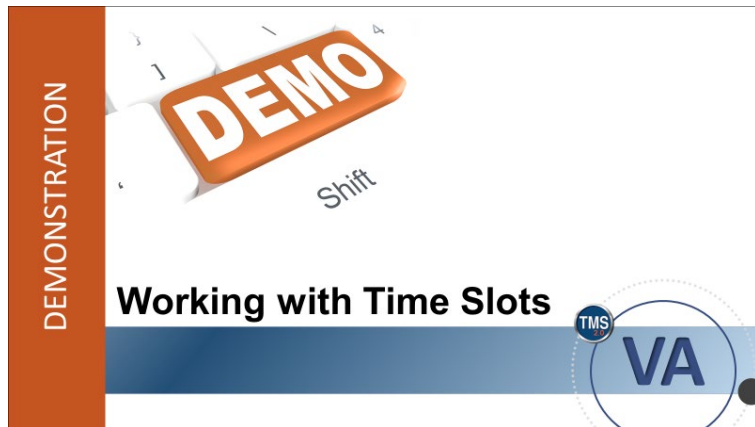
Slide 25: Demonstration: Working with Time Slots

Demonstration: Working with Time Slots

Now the instructor will demonstrate how to work with time slots in the TMS.

Notes:_____
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Demonstration: Working with Time Slots

1. Navigate to **Learning Activities**> **Items**.

2. Enter search criteria to search for the item created in Activity #1.

3. Select the **Item ID** link to access the item record.

   Note: If you haven't navigated away from the item in the previous activity, you do not need to search for it. If you have, you can also access the item record from your **Recents** panel (point out Recents panel).

4. Select the **Agenda Template** tab in the Related area.

5. Select **Add Time Slot**.

6. Enter 1 for the **Day.**

7. Enter "Ice Breaker" as a **Description** for the time slot.

8. Enter a **Duration.**

9. Adjust the **Delay Start** and **Location Type** if desired.

10. Select **Save**.

11. Choose **Copy Time Slots** to copy the Ice Breaker time slot to consecutive days. Enter "2" as the **Number of Times to Copy**.

12. Select **Copy**.

13. Add a new time slot under day 1 entitled "Introduction." Select **Add Time Slot**.

14. Enter 1 for the **Day.**

15. Enter "Introduction" as a **Description** for the time slot.

16. Enter a **Duration.**

17. Adjust the **Delay Start** and **Location Type** if desired.

18. Select **Save**.

19. To add an additional time slot for day 2 to the agenda, select **Add Time Slot** again.

20. Enter 2 for the **Day.**

21. Enter "Group Exercise" as a **Description** for the time slot.

Notes:_____

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22. Enter a **Duration.**

23. Select **Save**.

24. Under any time slot, select the **more** menu. Choose **Manage Equipment.**

25. In the new window, select **add one or more from list**.

26. Check boxes next to the desired equipment types, adjust the Count number, and select **Add**.

27. Close the Equipment window. (Selecting Apply Changes is only necessary if you want to adjust the Count number or remove equipment).

Notes:_____
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Slide 26: Activity #2: Working with Time Slots

Activity #2: Working with Time Slots

Now you will have an opportunity to practice working with time slots in the VA TMS.

Please complete the steps for Activity #2 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.

Notes:_____
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Activity #2: Working with Time Slots

1. Navigate to **Learning Activities**> **Items**.
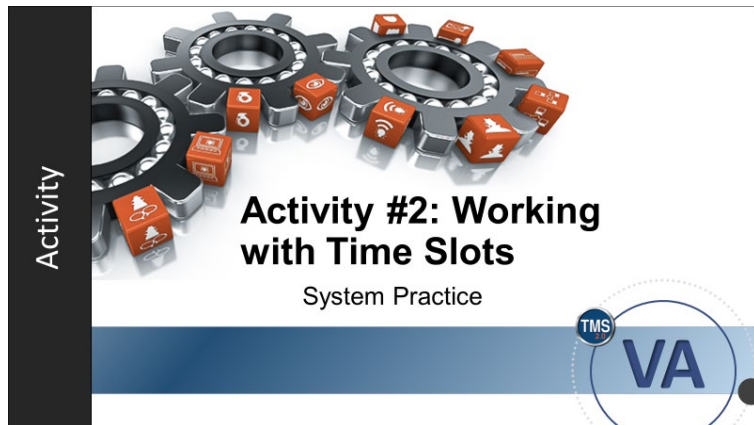
2. Enter search criteria to search for the item created in Activity #1.

3. Select the **Item ID** link to access the item record.

   Note: If you haven't navigated away from the item in the previous activity, you do not need to search for it. If you have, you can also access the item record from your **Recents** panel.

4. Select the **Agenda Template** tab in the Related area.

5. Select **Add Time Slot**.

6. Enter 1 for the **Day.**

7. Enter "Ice Breaker" as a **Description** for the time slot.

8. Enter a **Duration.**

9. Adjust the **Delay Start** and **Location Type** if desired.

10. Select **Save**.

11. Choose **Copy Time Slots** to copy the Ice Breaker time slot to consecutive days. Enter "2" as the **Number of Times to Copy**.

12. Select **Copy**.

13. Add a new time slot under day 1 entitled "Introduction." Select **Add Time Slot**.

14. Enter 1 for the **Day.**

15. Enter "Introduction" as a **Description** for the time slot.

16. Enter a **Duration.**

17. Adjust the **Delay Start** and **Location Type** if desired.

18. Select **Save**.

19. To add an additional time slot for day 2 to the agenda, select **Add Time Slot** again.

20. Enter 2 for the **Day.**

21. Enter "Group Exercise" as a **Description** for the time slot.

Notes:_____
_____
_____
_____

22. Enter a **Duration.**

23. Select **Save**.

24. Under any time slot, select the **more** menu. Choose **Manage Equipment.**

25. In the new window, select **add one or more from list**.

26. Check boxes next to the desired equipment types, adjust the Count number, and select **Add**.

27. Close the Equipment window. (Selecting Apply Changes is only necessary if you want to adjust the Count number or remove equipment).

Notes:_____
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Slide 27: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

All time slots in an item must be assigned the same resources.

   a) True

   b) False

Slide 28: Questions?

Questions?

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

Notes:_____
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2.3 Lesson 2: Curricula and Programs
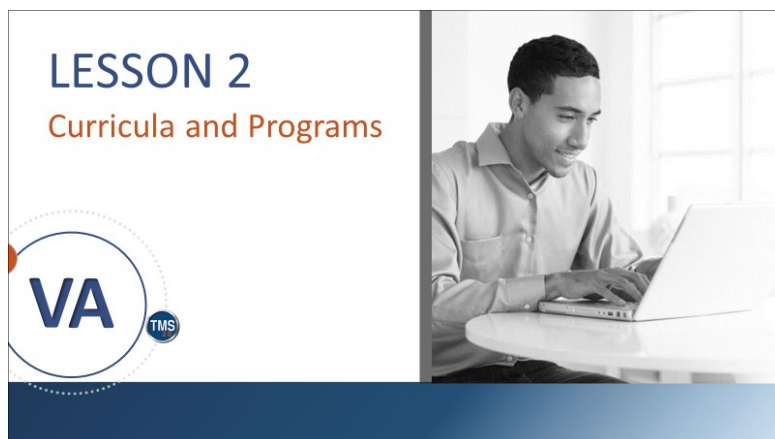
Slide 29: Lesson 2: Curricula and Programs
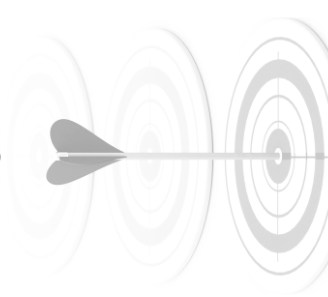
Lesson 2: Curricula and Programs

The goal for this lesson is to learn how to create and configure curricula and programs in TMS.

Slide 30: Lesson 2 Objectives

Lesson 2 Objectives

After completing this lesson, you will be able to:

- Understand grouping items into a curriculum

- Create, configure, and modify curricula

- Create, configure, and modify programs

Notes:_____

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Curriculum

- A Curriculum is a grouping of one or more items for the purpose of assignment and tracking as a single entity
- Curricula provide the functionality to recalculate required-by dates on items that have been completed but must be repeated on a recurring basis

Slide 31: Curriculum

Curriculum

A Curriculum is a grouping of one or more items for assigning and tracking as a single entity.

Curricula provide the functionality to recalculate required-by dates on items that have been completed but must be repeated on a recurring basis.

Grouping Items

Curriculum:
- Item A
- Item B
- Item C

Collectively known as
- **Item D**

User's To-Do List:
- Item A
- Item B
- Item C

User's Learning History:
- Item D

Slide 32: Grouping Items

Grouping Items

This graphic shows typical users that are at the center of the process. They are taking an item and a curriculum comprised of two items. It still shows as three separate items on their To-Do Lists. Once all items are complete, the curriculum will display as complete on the User's Learning History.

Notes:_____

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Characteristics of Curricula

- Items can be used in one or multiple curricula with different date and requirement settings in each
- Modifications made to a curriculum have an immediate impact on all users who have the curriculum currently assigned
- Curricula can be linked to a job code or assigned with an assignment profile and are automatically assigned when a user is given that job code or meets the profile attributes
- Curriculum can contain requirements to complete
    - # of hours
    - # of hours from an item pool
    - # of items from an item pool

Slide 33: Characteristics of Curricula

Characteristics of Curricula

There are four general characteristics of curricula:

- Items can be used in one or multiple curricula with different date and requirement settings in each

- Modifications made to a curriculum have an immediate impact on all users who have the curriculum currently assigned

- Curricula can be linked to a job position or assignment profile and automatically assigned when a user is given that job position or meets the profile attributes

- Curricula can contain requirements including:

    - # of Hours

    - # of Hours from an Item Pool

    - # of Items from an Item Pool

Notes:_____
_____
_____
_____

Curriculum Statuses

Curricula can have one of two statuses:
- Complete:
  - All items are complete
  - Curriculum Requirements have been met
- Incomplete:
  - Required items not complete
  - Retraining date has passed
  - Item is added to curriculum with effective date in the past
  - Curriculum Requirements have not been met

Slide 34: Curriculum Statuses

Curriculum Statuses

Curricula can have one of two statuses:

- Complete

- Incomplete

A curriculum is marked **Complete** when:

- All required items in the curriculum have been successfully completed and recorded, **or**

- The curriculum requirements have been met as described under the Contents tab.

The curriculum is marked **Incomplete** when:

- Any required item has not been successfully completed and recorded

- A completed item's retraining interval date has passed

- The curriculum is modified with a new or revised item, and the effective date is set in the past

- The curriculum requirements have not been met as described under the Contents tab.

Notes:_____

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Slide 35: Demonstration: Add a New Curriculum

Demonstration: Add a New Curriculum

Now the instructor will demonstrate how to add a new curriculum in the TMS.

Notes:_____
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Human Resources & Administration

Demonstration: Add a New Curriculum

1. Navigate to **Learning Activities** > **Curricula**. Switch to your Recents to have quick access to your Item ID.

2. Select the **Add New** link.

3. Add the **Curriculum ID**. Follow the VA naming convention for curricula: LLL-XXXX

   L = the location or Security Domain (such as SEA for Seattle or PHO for Phoenix)

   X = a series of alpha-numeric characters

4. Enter the **Title**.

5. Enter a **Description** of the curriculum.

6. Enter the **Creation Date** using the calendar icon or by entering the date in the field.

7. Check the **Active** checkbox.

8. Enter the **Security Domain** (TRAIN).

9. Enter a **Curriculum Type** from the dropdown list.

10. Select a **Priority** of **1**.

11. Select the Subsequent Failures Reset Curriculum Status checkbox

12. Select the **Add** button.

Notes:_____
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_____
_____

Slide 36: Activity #3: Add a New Curriculum

Activity #3: Add a New Curriculum

Now you will have an opportunity to practice adding a new curriculum in the VA TMS.

Please complete the steps for Activity #3 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.

Notes:_____
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_____
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Activity #3: Adding a New Curriculum

1. Navigate to Learning Activities > Curricula.

2. Select the **Add New** link.

3. Add the **Curriculum ID**. Follow the VA naming convention for curricula: LLL-XXXX

   L = the location or Security Domain (such as SEA for Seattle or PHO for Phoenix)

   X = a series of alpha-numeric characters

4. Enter the **Title**.

5. Enter a **Description** of the curriculum.

6. Enter the **Creation Date** using the calendar icon or by entering the date in the field.

7. Check the **Active** checkbox.

8. Enter the **Security Domain** (TRAIN).

9. Enter a **Curriculum Type** from the dropdown list.

10. Select a **Priority** of **1**.

11. Select the Subsequent Failures Reset Curriculum Status checkbox

12. Select the **Add** button.

Notes:_____

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Slide 37: Knwoledge Check

Slide 38: Associating Contents

Knowledge Check

Answer the following question using the chat feature.

A curriculum shows up as a single item on a user's To-Do List.

a) True

b) False

Associating Contents

The Contents tab in the Related area is used to view, associate, and edit one or more of the following to the curriculum:
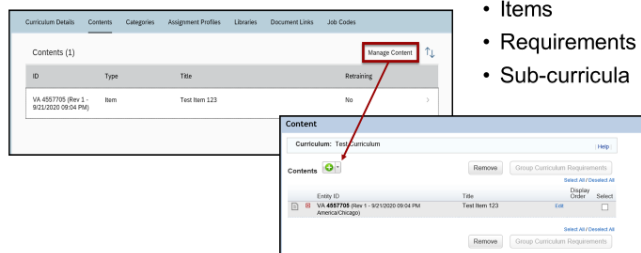
- Items

- Curriculum Requirements

- Sub-curricula

As you add content, the system places the new content at the bottom of the list; however, you can later adjust the visual sequencing of the content by selecting the **Edit** button and then the **Move Up** or **Move Down** buttons.

By adjusting the visual sequencing, the display of information is impacted when users view the curriculum details in the user interface. It does not affect the due dates or sequence of due dates.

This visual sequencing can be used as a way to suggest to users which piece of content they should complete first when two or more pieces of content are due on the same day.

Notes:_____

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For each piece of content associated with a curriculum, you can select the **Expand** button to view the assignments (for the item or requirement) or the items of the curricula.

Notes:_____

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Items in a Curriculum

- There is no limit to the number of items that may be added to a curriculum
- The following fields are editable in an item:
  – Initial Assignment
  – Retraining Assignment
  – Basis Date
  – Effective Date
  – Assignment Type

Slide 39: Items in a Curriculum

Items in a Curriculum

There is no limit to the number of items that may be added to a curriculum. In the Edit Curriculum window (i.e., select the **Content** button in Related area > **Manage Content**), select the **Edit** link for each item to modify:

- **Initial Assignment:** The amount of time a user has to initially complete the item, measured in days, weeks, months, quarters, or years

- **Retraining Assignment:** The amount of time a user has to retake and complete the item once he or she successfully completes the item

- **Basis Date:** Defines the beginning point of the time-periods. The time-periods themselves are built using either the initial assignment information, or the retraining assignment information. Once the item is completed, it is not due again until the end of the next period. Using the basis date system, you can assign learning that is due once a quarter, or once a year, but permit the user to complete it at any time during the quarter or year

- **Effective Date:** The date when the item has an impact on the overall curriculum status

- **Assignment Type:** Required or Optional or other related types.

Notes:_____

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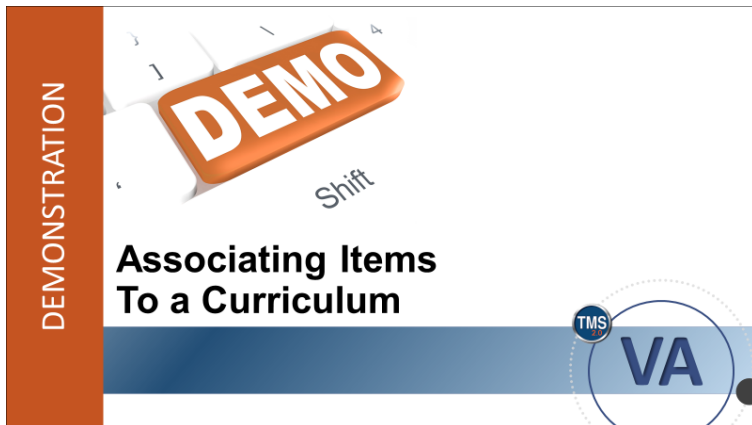
Slide 40: Demonstration: Associating Items to a Curriculum

Demonstration: Associating Items to a Curriculum

Now the instructor will demonstrate how to associate items to a curriculum in the VA TMS.

Notes:_____

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Demonstration: Associating Items to a Curriculum

1. Access the curriculum record created in the previous activity.

2. Select the **Contents** tab in the Related area.

3. Select Manage Content.

4. Select the **Add Contents** button.

5. Select **Items** from the dropdown menu.

6. Enter search criteria for the Item created in Demo 1. Select **Search**.

7. Select the **Add** checkbox next to each item to add to the curriculum.

8. Select the **Add** button. The selected item(s) is(are) added to the contents list.

9. Select the **Edit** link next to the listed item.

10. Enter 30 for the Initial Number.

11. Select the **Required (Required)** assignment type.

12. Select Apply Changes

13. Follow steps 3-8 to add additional items.

14. To open and edit the Items, select **Manage Content** to return.

15. Select the **Move Up** arrow and **Move Down** arrows to sequence the curriculum content. This sets the suggested order display for users.

16. Select the **X** to close the Edit window and return to the curriculum record.

Notes:_____
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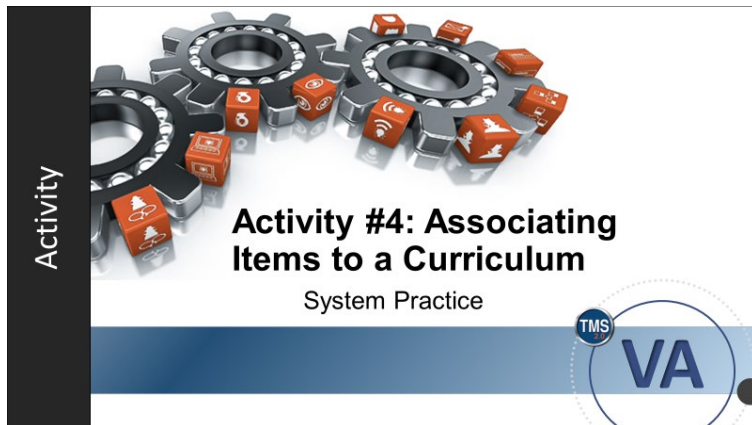
Slide 41: Activity #4: Associating Items to Curriculum

Activity #4: Associating Items to a Curriculum

Now you will have an opportunity to practice associating an item to a curriculum in TMS.

Please complete the steps for Activity #4 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.

Notes:_____
_____
_____
_____

Activity #4: Associating Items to a Curriculum

1. Access the curriculum created previously.

2. Select the **Contents** tab in the Related area.

3. Select Manage Content.

4. Select the **Add Content** button.

5. Select **Items** from the dropdown menu.

6. You can use the Item IDs in your Recents tab from Activity 1. You can also enter criteria in the keyword field to search for the items to include in the curriculum.

7. Select **Search**.

8. Select the **Add** checkbox next to each item to add to the curriculum.

9. Select the **Add** button. The selected item(s) is added to the contents list. Add all Items created in Activity 1.

10. Select the **Edit** link next to one of the listed items.

11. Enter initial assignments (number and period).

12. Select an initial basis (event).

13. Do not enter retraining assignments.

14. Enter a basis date (if not defaulted) and an effective date (use the current date).

15. Select the **Required (REQ)** assignment type.

16. Select Apply Changes.

17. Select the **Move Up** arrow and **Move Down** arrows to sequence the curriculum content. This sets the suggested order display for users.

18. Select the **X** to close the Edit window and return to the curriculum record.

Notes:_____

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Adding Library and Category Info

- A library is used to make available to users those items and classes that weren't assigned by admins or managers
- Access to a library is provided through an assignment profile
- Categories make the item searchable by keyword

Slide 42: Adding Library and Category Information

Adding Library and Category Information

A library is used to make available to users those items and classes that weren't assigned by admins or managers. Access to a library is provided through an assignment profile.

Categories make the item searchable by keyword.

Notes:_____

_____

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Library Highlight Feature

Admins can highlight their curriculum in a library by using:

- **Highlight As:** this is a dropdown menu where you can mark a curriculum as New, Featured, or Revised
- **Highlight Until:** allows an admin to choose a date where the curriculum will no longer be highlighted
- **Reason to Highlight:** a freeform field where an admin can place a reason for highlighting their curriculum

Slide 43: Library Highlight Feature

Library Highlight Feature

Administrators can highlight their curriculum in a library using the highlight feature.

As an admin, you can raise the visibility of a learning item or a curriculum in the library search results via:

- **Highlight As:** This is a dropdown menu where you can mark a curriculum as New, Featured, or Revised.

- **Highlight Until:** This feature allows an admin to choose a date where the curriculum will no longer be highlighted.

- **Reason to Highlight**: This is a freeform field where an admin can place a reason for highlighting their curriculum.

Curriculum Deactivation

- The Curriculum Deactivation wizard allows the admin to deactivate items or curricula
- Curricula may have many relationships or be assigned to active users
- An admin can deactivate the curriculum and remove from active libraries or assignment profiles

Slide 44: Curriculum Deactivation

Curriculum Deactivation

The Curriculum Deactivation wizard allows admins to deactivate items or curricula.

Curriculum may have many relationships or be assigned to active users. As part of the deactivation process, Admins will choose to either deactivate with no additional actions or deactivate and select **Remove from active libraries or from active assignment profiles and execute changes.**

Notes:_____
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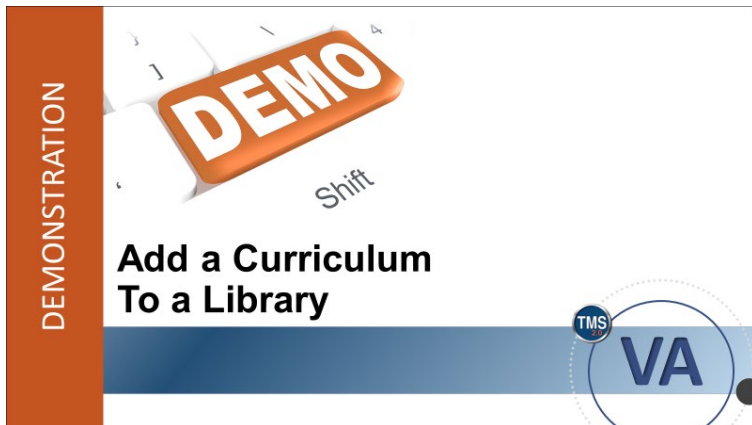
Slide 45: Demonstration: Add Curriculum to a Library

Demonstration: Add a Curriculum to a Library

Now the instructor will demonstrate how to add a curriculum to a library.

Notes:_____
_____
_____
_____

Demonstration: Add a Curriculum to a Library

1. Select the **Libraries** tab in the Related area.

2. Select the **Add Libraries** button (plus icon).

3. Enter keyword: **User** and select **Search**.

4. Check the **Add** checkbox in both clumns next to the listed LMS user library(ies).

   Note: Checking both boxes under each column ensure the users can access both the curriculum and the items associated to the curriculum. If only one is selected, the users will not be able to access the component that is not selected under the specified library.

5. Select **Add**.

6. Verify that the selected library is displayed.

7. Select the **Edit** icon.

8. Enter a date in the **Remove from Library on** field.

   Note: This date determines when the curriculum will no longer be listed in the selected Library.

9. Select an option in the **Highlight As** field.

10. Enter a date in the **Highlight Until** field.

11. Enter a reason in the **Reason to Highlight** field.

12. Select **Save.**

Add Categories to a Curriculum

1. Select the **Categories** tab under the Related section.

2. Select the **Add Categories** icon (plus icon).

3. Select the **Add** checkbox in both columns next to a listed category.

   Note: Checking both boxes under each column ensure the users can access both the curriculum and the items associated to the curriculum. If only one is selected, the users will not be able to find the component that is not selected under the specified category.

4. Select **Add.**

Deactivate Curriculum

1. From the Curriculum level, in the Actions area, select the link for **Deactivate**.

2. As the wizard pops up select **Deactivate, Unassign and Remove relationships**.

Notes:_____
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3. Select both **Remove from active libraries and remove associated items from library**.

4. Select **OK**.

Notes:_____

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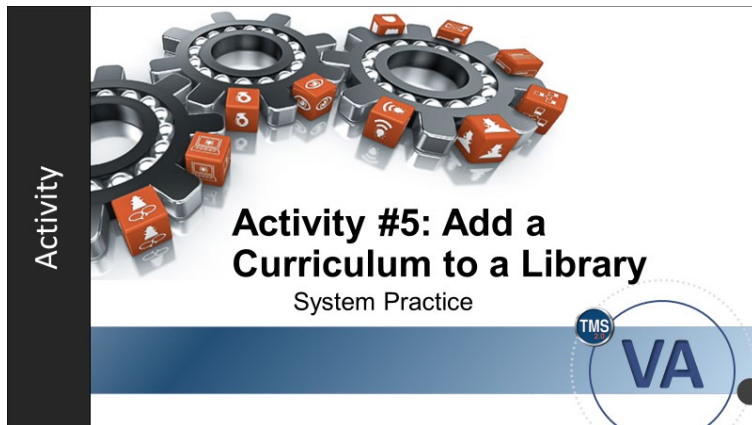
Slide 46: Activity #5: Add Curriculum to a Library

Activity #5: Add a Curriculum to a Library

Now you will have an opportunity to practice adding a curriculum to a library in the VA TMS.

Please complete the steps for Activity #5 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.

Notes:_____
_____
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_____

Activity #5: Add Curriculum to a Library:

1. Select the **Libraries** tab in the Related area.
2. Select the **Add Libraries** button (plus icon).
3. Enter keyword: **User** and select **Search**.
4. Check the Add checkbox in both clumns next to the listed LMS user library(ies).

    Note: Checking both boxes under each column ensure the users can access both the curriculum and the items associated to the curriculum. If only one is selected, the users will not be able to access the component that is not selected under the specified library.

5. Select **Add**.
6. Verify that the selected library is displayed.
7. Select the **Edit** icon.
8. Enter a date in the **Remove from Library on** field.

    Note: This date determines when the curriculum will no longer be listed in the selected Library.

9. Select an option in the **Highlight As** field.
10. Enter a date in the **Highlight Until** field.
11. Enter a reason in the **Reason to Highlight** field.
12. Select **Save.**

Add Categories to a Curriculum

1. Select the **Categories** tab under the Related section.
2. Select the **Add Categories** icon (plus icon).
3. Select the **Add** checkbox in both columns next to a listed category.

    Note: Checking both boxes under each column ensure the users can access both the curriculum and the items associated to the curriculum. If only one is selected, the users will not be able to find the component that is not selected under the specified category.

4. Select **Add.**

Deactivate Curriculum

1. From the Curriculum level, in the Actions area, select the link for **Deactivate**.
2. As the wizard pops up select **Deactivate, Unassign and Remove relationships**.

Notes:_____
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3. Select both **Remove from active libraries and remove associated items from library**.

4. Select **OK**.

Notes:_____
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Programs

- Programs combine learning events to create a schedule of learning
- The schedule of learning is controlled by the program's agenda
- Learning events can be internal or external

Slide 47: Programs

Programs

Programs are another way to combine learning events as activities to assign to a user.

A program creates a schedule of learning controlled by the program's agenda.

Activities can be internal or external.

Notes:_____
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Programs (cont'd)

- Programs can be:
  - Academic-style learning
  - Self-paced
- Programs are built from:
  - Online items
  - Virtual sessions
  - ILT items
  - Links to images, documents, and web pages

Slide 48: Programs (cont'd)

Program Tiles

Once a program is created, it has several tiles available to you:
1. Description
2. Settings
3. Agenda
4. Assignment
5. Publishing

Slide 49: Program Tiles

Programs (cont'd):

Programs can be:

- Academic-style learning

- Self-paced

Programs are built from:

- Online items

- Virtual sessions

- ILT items

- Links to images, documents, and web pages

Program Tiles:

Once a program is created, it has several tiles available to you:

1. Description

2. Settings

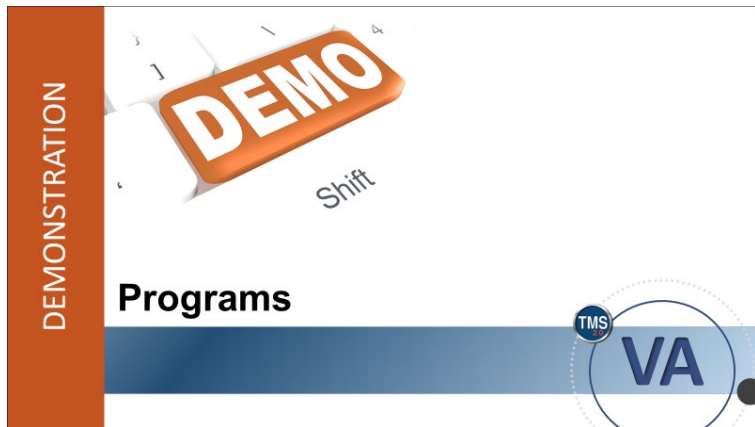3. Agenda

4. Assignment

5. Publishing

Notes:_____

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Slide 50: Demonstration: Programs

Demonstration: Programs

Now the instructor will demonstrate how to create a Program in the TMS.

Notes:_____
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Demonstration: Programs

Create a New Program

1. From the Admin homepage select **Learning Activities.**

2. Select **Programs**.

3. Select the **Add New** link.

4. Enter basic information in the fields on the Program page. Set up a 4-week **Duration-based** program. **Note**: Required fields are marked with a red asterisk.

5. Select **Create Program**.

6. The Program Summary page displays. Notice that there are several tiles on this page: **Description, Agenda, Assignment, Publishing,** and **Settings**. As an admin, you can edit each of these sections.

    •   **Description**: Describes the program

    •   **Agenda**: Allows you to create agendas for the program

    •   **Assignment**: Allows you to create assignment profiles for the program

    •   **Publishing**: Allows you to publish the program to libraries and select categories

    •   **Settings**: Contains the various settings for the program

Create a Program Agenda

1. Select the **Edit** icon on the **Agenda** tile.

2. Enter Section 1 in the **Agenda Title** field.

3. Enter a 3 in the **Add sections** area. Select the **Add** button to add new sections.

4. Enter Section 2 in the second **Agenda Title** field.

5. Add activities into each section by selecting one of the choices. When you select Class, Online Only, Class and Online, or Other, the **Items** search page will launch

6. Enter Search Criteria for the item you wish to add.

7. Select **Search.**

8. Select the **Select** link next to the item you want to add.

9. Select **Save.**

10. Select **Done.**

Notes:_____
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Notice how your agenda displays on the **Program Summary** page once you have built it out.

Publish a Program

1. Select the **Edit** icon on the **Publishing** tile.

2. Select the **Add** button under the **Libraries** panel.

3. Enter Search Criteria for a library.

4. Select **Search**.

5. Select the **Add** checkbox for the library(ies) you want to add.

6. Select **Add**.

7. Select the **Add** button under the **Categories** panel.

8. Select the **Add** checkbox for the category(ies) you want to add.

9. Select **Add**.

10. Select **Done**.

Notes:_____
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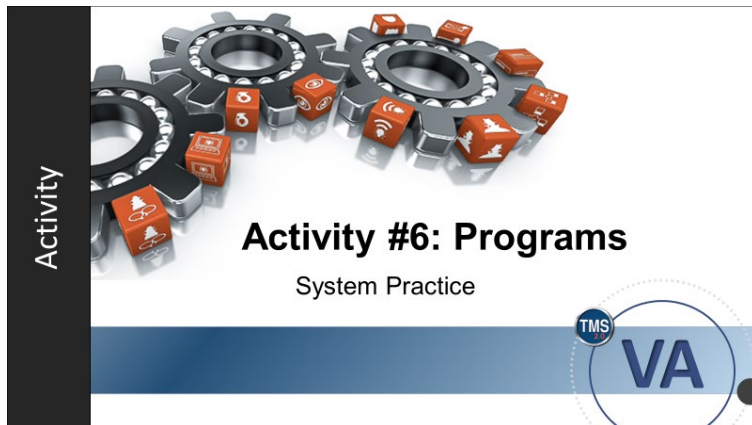
Slide 51: Activity #6: Programs

Activity #6: Programs

Now you will have an opportunity to practice adding a new program in the VA TMS.

Please complete the steps for Activity #6 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.

Notes:_____
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Activity #6: Programs

Create a New Program

1. From the Admin homepage select **Learning Activities.**

2. Select **Programs.**

3. Select the **Add New** link.

4. Enter basic information in the fields on the Program page. **Note**: Required fields are marked with a red asterisk.

5. Select **Create Program.**

Create a Program Agenda

1. Select the **Edit** icon on the **Agenda** tile.

2. Enter Section 1 in the **Agenda Title** field.

3. Change days to 3 in the **Add Sections** area.

4. Select the **Add** button to add new sections.

5. Enter Section 1 in the **Agenda Title** field .

6. Add activities into each section by selecting one of the choices. When you make a class selection, the **Items** search page will launch.

7. Enter Search Criteria for the item you wish to add.

8. Select **Search.**

9. Select the **Select** link next to the item you want to add.

10. Select **Save.**

Notice how your agenda displays on the **Program Summary** page once you have built it out.

Publish a Program

1. Select the **Edit** icon on the **Publishing** tile.

2. Select the **Add** button under the **Libraries** panel.

3. Enter Search Criteria for a library.

4. Select **Search**.

5. Select the **Add** checkbox for the library(ies) you want to add.

6. Select **Add**.

Notes:_____
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7. Select the **Add** button under the **Categories** panel.

8. Select the **Add** checkbox for the category(ies) you want to add.

9. Select **Add**.

10. Select **Done**.

Notes:_____

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Slide 52: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

Which of the following may be added to a program? Select as many as apply.

a) Instructor-Led Items

b) Online Items

c) Links to a web page

d) Text instrucutions

e) All of the above

Slide 53: Questions?

Questions?

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

Notes:_____
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2.4 Lesson 3: Substitutes and Prerequisites
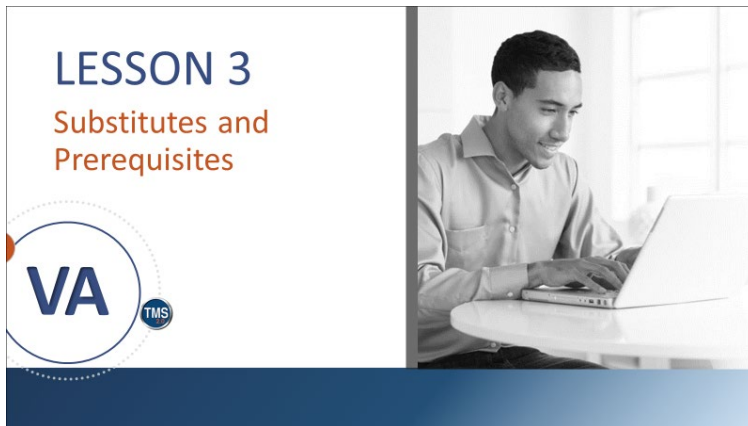
Slide 54: Lesson 3: Substitutes and Prerequisites

Lesson 3: Substitutes and Prerequisites

This lesson will cover substitutes and prerequisites in the VA TMS.
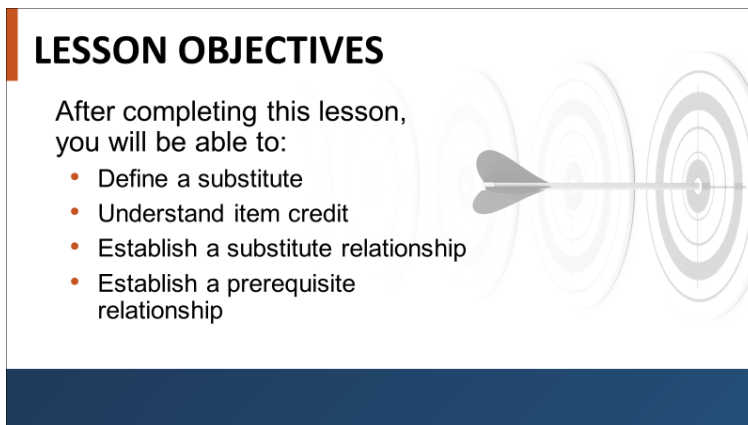
Slide 55: Lesson Objectives

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Define a substitute

- Understand item credit

- Establish a substitute relationship

- Establish a prerequisite relationship

Notes:_____

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Talent Management System

Human Resources & Administration

Substitutes

- Ability to grant a user substitute credit for an event by completing another event
- Configure the item that GRANTS substitute credit with the substituting item (only one level of substitution occurs)
- Use the Provide Credit for Base Item If Not Assigned option to give substitute credit for items that are not assigned to users
- Retroactive substitute credit can be granted by using an effective date

Slide 56: Substitutes

Substitutes

In some training situations, it is necessary to grant a user substitute credit for item A after completing item B (this is especially useful in curricula). Configure the item that GRANTS substitute credit with the substituting item.
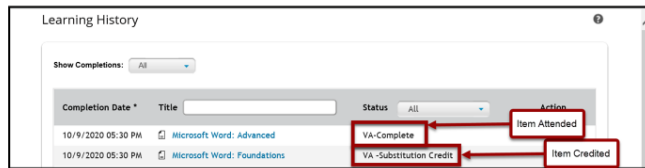
Substitute Items: Upon successful completion of an item, TMS can grant completion credit for another (substitute) item by recording two learning events. Use the Provide Credit for Base Item If Not Assigned option to give substitute credit for items that are not assigned to users. Retroactive substitute credit can be granted by using an effective date.

For example, the Microsoft Word Foundations item is listed on a User's To-Do List. Microsoft Word Advanced Concepts is a substitute for Microsoft Word Foundations. The user completes and passes Microsoft Word Advanced Concepts. After an admin records the advanced course as a learning event for the user, TMS records an additional learning event for the basic course.

Notes:_____
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Slide 57: Credit for Items

Credit for Items

When a user successfully completes a substitute item, TMS grants credit for another item by recording **two** learning events.

Notes:_____

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Prerequisites

- Prerequisites are identified on the item record's Prerequisite tab in the Related area.
- Depending on settings, users are prevented from registering into a class with a prerequisite if:
  - The prerequisite is not listed in the user's Learning History
    - **- OR -**
  - The user is not registered into a class of the prerequisite that has an end date prior to the start date of the class

Slide 58: Prerequisites

Prerequisites

Prerequisites are identified on the item record's Prerequisite tab within the Related area, which lists all items the user must complete before he or she can self-register for a class or launch an online item.

Depending on the VA TMS global setting, users are prevented from registering into a class with a prerequisite if:

- The prerequisite is not listed in the user's Learning History (Completed Work)

    OR

- The user is not registered into a class of the prerequisite that has an end date prior to the start date of the class

In the case of an online item, the prerequisite must be in the user's Learning History (Completed Work) before the user is able to launch the item. These rules apply to all of the prerequisites for the item.

Note: Managers and Admins have the right to override any prerequisite requirement.

Notes:_____

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Slide 59: Establish a *Substitute* and Prerequisite Relationship
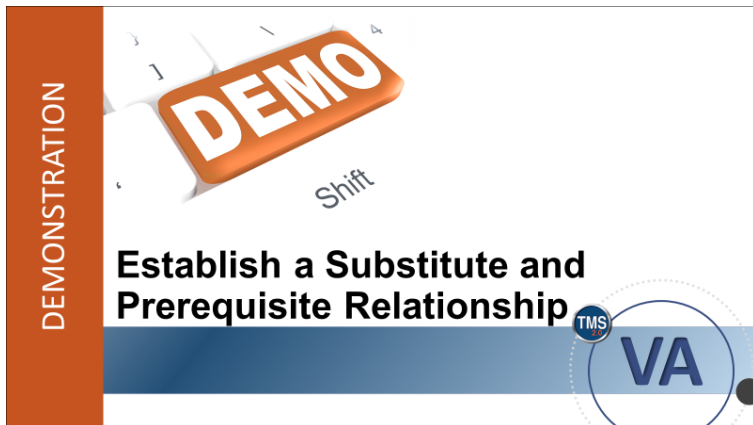
Demonstration: Establish a Substitute and Prerequisite Relationship

Now the instructor will demonstrate the substitute and prerequisite feature in TMS.

Notes:_____

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Demonstration: Establish a Substitute and Prerequisite Relationship

1. Navigate to Learning Activities > Items.

2. Enter search criteria and select **Search.**

3. Select the item that will be recorded into a user's learning history (completed work) with a status of substitute credit.

4. Select the **item ID** link.

5. Select the **Substitutes** tab from the Related area.

6. Select **Add New Substitutes** (plus sign icon).

7. Enter criteria to search for the item that will grant substitute credit.

8. Select **Search**.

9. Select the **VA—Substitution Credit** from the For-Credit Status dropdown menu.

10. Check the Provide Credit for Base Item if Not Assigned checkbox.

    Note: If Provide Credit for Base Item if Not Assigned is not checked, then users must have the item receiving substitute credit on their To-Do List in order to record the substitute learning event. When Provide Credit for Base Item if Not Assigned is checked, users always receive substitute credit for the item regardless of whether it is assigned to their To-Do List.

    Note: If you would like to apply retroactive substitute credit, enter an effective date.

11. Check the **Add** checkbox.

12. Select **Add**.

13. Verify the selected item is displayed with the correct settings.

Establish Prerequisite Relationship:

1. Find and enter the item record that will require prerequisites.

2. Select the **Prerequisites** tab from the Related area.

3. Select **Create Group** (plus sign).

4. Create a **Group Title**, such as *Getting Started*.

5. Select **OK.**

6. Select **Add Items/Curricula** (plus sign next to new group).

Notes:_____
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7. Enter criteria to search for the other item created in Activity 1. (Survey your recents for the Item ID).

8. Select **Search.**

9. Select the **Add checkbox**.

10. Select **Add**.

11. Verify the selected item is displayed.

Notes:_____
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Slide 60: Activity #7: Establish a *Substitute* and Prerequisite Relationship

Activity #7: Establish a Substitute and Prerequisite Relationship

Now you will have an opportunity to practice adding a new substitute and prerequisite in the VA TMS.

Please complete the steps for Activity #7 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.

Notes:_____
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Activity #7: Establish a Substitute and Prerequisite Relationship

Establish Substitute Relationship:

1. Utilizing the Items from Activity 1, you will place **Departmental Policies** under **New Hire Orientation** for substitute credit. Begin by accessing the **Item Record** for New Hire Orientation.

2. Select the **Substitutes** tab from the Related area.

3. Select **Add New Substitutes** (plus sign).

4. Enter criteria to search for the item that will grant substitute credit.

5. Select **Search**.

6. Select the **(completion) status** and **substitute credit** from the Status drop-down menu.

    Note: This is the completion status for the item that will receive substitute credit.

7. Check the Provide Credit for Base Item if Not Assigned checkbox.

    Note: If Provide Credit for Base Item if Not Assigned is not checked, then users must have the item receiving substitute credit on their To-Do List in order to record the substitute learning event. When Provide Credit for Base Item if Not Assigned is checked, users always receive substitute credit for the item regardless of whether it is assigned to their To-Do List.

    Note: If you would like to apply retroactive substitute credit, enter an effective date.

8. Check the **Add** checkbox.

9. Select **Add**.

10. Verify the selected item is displayed with the correct settings.

Establish Prerequisite Relationship:

1. Utilizing the Items from Activity 1, you will place **Departmental Policies** under **Leading Through Example** as a prerequisite. Begin by accessing the **Item Record** for Leading Through Example.

2. Select the **Prerequisites** tab from the Related area of the second item.

3. Select **Create Group** (plus sign).

4. Create a **Group Title**, such as *Getting Started*.

5. Select **OK.**

6. Select **Add Items/Curricula** (plus sign next to new group).

Notes:_____

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Administration

7. Enter criteria to search for the other item created in Activity 1. (Survey your recents for the Item ID).

8. Select **Search.**

9. Select the **Add checkbox**.

10. Select **Add**.

11. Verify the selected item is displayed.

Job aid available on the TMS Resource site.

Notes:_____
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Slide 61: Knowledge Check

Knowledge Check

Answer the following question using the chat feature or unmuting your phone.

Which of the following are correct statements?

a) A substitute relationship is added within the substitute item record.

b) A substitute credit can only be given to an item already listed on a users To-Do list.

c) A prerequisite can be overridden by a user entering their password.

d) A prerequisite can contain multiple items.

Slide 62: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

If you check the Provide Credit for Base Item if Not Assigned checkbox in the Substitutes tab of the item record, _____.

a) Nothing happens

b) Users must not have the item in their My Learning List.

c) Users receive credit even if it is not on their My Learning List.

d) Users receive credit even if the box is not checked.

Notes:_____

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Slide 63: Knowledge Check

Slide 64: Questions?

Knowledge Check

Answer the following question using the chat feature.

How many learning events are recorded on the completion of a substitute item when Provide Credit for Base Item if Not Assigned is checked?

a) 0

b) 1

c) 2

d) 3

Questions?

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

Notes:_____
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Talent Management System

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2.5 Lesson 4: Item Revision Assistant
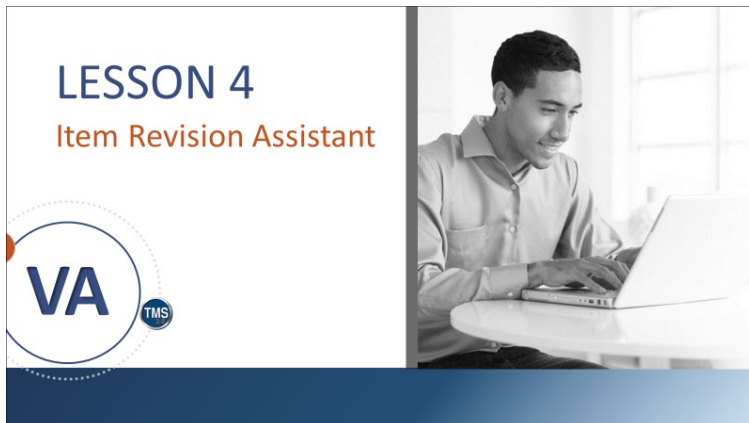
Slide 65: Item Revision Assistant

Lesson 4: Item Revision Assistant

This lesson will cover the item revision assistant feature in TMS.

Slide 66: Item Revision

Item Revision

When the content of a course or a document, such as a Standard Operating Procedure (SOP), changes dramatically, the VA may require its employees to re-read the document or attend the new or revised course. The Revision Assistant lets you create a new version of the item for all users who:

- Are required to complete the item as a part of a curriculum

- Have the item as a free-floating assignment

Notes:_____

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Item Revision

- Creates a new item key identical to the old one, with an updated revision date and time
- Old item remains for audit and reporting and should be deactivated
- If respective boxes are checked, can affect substitutes, prerequisites, instructors, future classes, and free-floating and curriculum assignment of the items

Slide 67: Item Revision (Continued)

Item Revision (Continued)

As mentioned in a previous lesson, the item key is comprised of item type, item ID, and revision date/time. During item revision, TMS creates a new item record where the item type and ID of the new item are identical to the original. The revision date/time is the updated portion of the item key.

Admins have the option of updating the version number to meet their organization's standard revision number system. After the revision process is complete, you should deactivate the old item. It is not deleted from TMS in case there is a need to access the old item for audit and reporting purposes.

If the respective boxes are checked in the Revision Assistant, the revision will apply to:

- Substitutes
- Instructor authorization
- Curriculum assignment of the original item
- Free-floating assignment of the original item
- Future classes of the original item
- Prerequisites

Notes:_____

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Slide 68: Demonstration: Revise an Item

Demonstration: Revise an Item

Now the instructor will demonstrate how to revise an item in TMS.

Notes:_____

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Demonstration: Revise an Item

1. Navigate to Learning Assignments > Items.

2. Search for an item and select the **item ID**.

3. Select **Revis**e in the Actions area.

4. Enter a new revision date, revision time, and revision number.

   Note: Revision Date/Time cannot be in the future.

5. Change the item title, if necessary.

6. Select **Next**.

7. Check the **substitute relationship** and **authorized instructor** checkboxes. **Note**: The contents of the Surveys tab will not be copied to the new revision. It is recommended that you populate this tab prior to making this revision production ready.

8. Select **Next**.

9. Select the Make this item production ready option.

10. Select **Next**.

11. Check all four checkboxes in Step 4 of the item revision process.

    Note: If this item is part of a curriculum, review the item settings within each curriculum and make any necessary changes to assignment types, initial periods, retraining periods, etc. If the item has an assignment type of Required (or similar), you must enter an effective date.

12. Select **Next** and review the displayed information.

13. Select Run Job Now.

Job Aid: Available on the TMS Resource site.

Notes:_____

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Slide 69: Activity #8: Revise an Item

Activity #8: Revise an Item

Now you will have an opportunity to practice revising an item.

Please complete the steps for Activity #8 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.

Notes:_____

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Activity #8: Revise an Item

1. Navigate to Learning Assignments > Items.

2. Search for an item and select the **item ID**.

3. Select **Revis**e in the Actions area.

4. Enter a new revision date, revision time, and revision number.

    Note: Revision Date/Time cannot be in the future.

5. Change the item title, if necessary.

6. Select **Next**.

7. Check the **substitute relationship** and **authorized instructor** checkboxes. **Note:** The contents of the Surveys tab will not be copied to the new revision. It is recommended that you populate this tab prior to making this revision production ready.

8. Select **Next**.

9. Select the Make this item production ready option.

10. Select **Next**.

11. Check all four checkboxes in Step 4 of the item revision process.

    Note: If this item is part of a curriculum, review the item settings within each curriculum and make any necessary changes to assignment types, initial periods, retraining periods, etc. If the item has an assignment type of Required (or similar), you must enter an effective date.

12. Select **Next** and review the displayed information.

13. Select Run Job Now.

   Job Aid: Available on the TMS Resource site.

Notes:_____

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Slide 70: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

The admin can choose whether or not to transfer prerequisites from the original item to the revised item.

a) True

b) False

Slide 71: Questions?

Questions?

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

Notes:_____
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Slide 72: Session Summary

Session Summary

To recap: In this session, you learned how to:

- Create and configure items

- Create and configure curricula and programs

- Set up substitutes and prerequisites

- Use the item revision assistant

Slide 73: Session 2 Preview

Session 2 Preview

In the next session, you will learn the following lessons.

- Lesson 1: Online Content Overview

- Lesson 2: Online Content and Packages

- Lesson 3: Items with Online Content

- Lesson 4: Assessments Tool

Notes:_____

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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. Clarence Bashshar: clarence.bashshar@va.gov

Slide 74: Additional Resources

Additional Resources

Here are some additional resources:

- TMS Resource Site:

  - https://www.hcsc.va.gov/

- TMS Administrators Community of Practice (COP):

  - VATMSCoP@va.gov

- Help Desk

  - 1-855-673-4357

- Dr Clarence Bashshar: 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:_____

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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.

Term	Definition
Curricula	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. Based on the learning history of the user, a curriculum shall have one of two statuses: • 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. 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. 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.

Term	Definition
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.

Term	Definition
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: • 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

Term	Definition
	• 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.
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 a sign.
Facility	A facility is a grouping of training locations. Facilities maybe 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.

Term	Definition
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.
Security Domain	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. 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.
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.

Term	Definition
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).
Time Slots	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: • 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 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.

Term	Definition
User	A User of the VA TMS includes all VA employees and staff (residents, volunteers, WOCs, students, contractors, and federal non-VA employees). 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.
Waitlist	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.
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																						
Add/Edit Accreditations																		X					
Apply Accreditations to Items																		X	X				
Create Deep Links			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