VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers

VA TMS Administrators
Role-Based Training
Virtual Instructor-Led Training

Participant Guide

December 2017
Introduction

Thank you for attending the Veterans Affairs (VA) Talent Management System (TMS) Training for Scheduling Managers, Assignment Managers, and Registration Managers course. VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers is one of a series of role-based courses designed to teach administrators the core knowledge and skills that are necessary for completing tasks that are associated with scheduling, assignment profiles, and course registration in the VA TMS.

A Web conferencing software tool will be used to conduct the training sessions.

Course Goal

This course provides information, demonstrations, and practice opportunities related to creating scheduled offerings, working with segments of scheduled offerings, registering users for scheduled offerings, and recording learning events in the VA TMS.

At the end of this course, participants should be able to:

- Create a scheduled offering of an instructor-led team
- Add, copy, and revise segments of scheduled offerings
- Manage resources for segments of schedule offerings
- Register users in training
- Use the Record Learning tool to record completed learning for users

Target Audience

The participants of the Scheduling Managers, Assignment Managers, and Registration Managers course are Domain Managers, Learning Managers, Item Managers, and AP Managers.

Participant Guide

This Participant Guide is divided into two sections:

- About This Training
- Training Content

NOTE: Print a hardcopy of the Participant Guides 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

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS TRAIN environment.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>This icon indicates that participants will complete an activity in VA TMS TRAIN environment.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>This icon indicates that there is a job aid available for the task.</td>
</tr>
</tbody>
</table>

Participant Preparation and Guidelines

Requirements
Participants must complete the following for this training:

- Register for training through the VA TMS.
- Print a hardcopy of this Participant Guide for use during the training. It will be difficult to access it electronically during training.
- Complete all knowledge checks and a post-assessment exam.

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.

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 hardcopy of the **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.

Course Length
The table below includes a list of all training lessons in the Scheduling Managers, Assignment Managers, and Registration Managers course, along with estimated times.

<table>
<thead>
<tr>
<th>Lessons</th>
<th>Estimated Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson 1: Scheduled Offerings</td>
<td>60 minutes</td>
</tr>
<tr>
<td>Lesson 2: Segments</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Lesson 3: Registration</td>
<td>60 minutes</td>
</tr>
<tr>
<td>Lesson 4: User Needs Management Tool</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Lesson 5: Record Learning Events</td>
<td>30 minutes</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>3.5 hours</strong></td>
</tr>
</tbody>
</table>
Scheduling Management

VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers

• Go to https://va-stage2.plateau.com/learning/admin/login.jsp
• Enter your TRAIN Admin Username
• Enter your TRAIN Admin Password
• VANTS LINE: AC:
• Participants Guide: http://www.valu.va.gov/Home/TMSResources

---

VATMS Administrators Role-Based Training:
VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers

---

Session 1

Participant Introductions

• Your name
• Where you work
• One expectation for this course
Session 1 VA Talent Management System

Logistics

Scheduled breaks

Mute phone lines/don’t put call on hold

Feel free to ask questions

Session 1 VA Talent Management System

Course Goal

Provide instruction and interactive practice on the core concepts and administrative functions of the VA TMS specific to Scheduling Managers, Assignment Managers, and Registration Managers job functions.

Session 1 VA Talent Management System

Training Methods

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

This guide contains:
- Copies of all PowerPoint slides
- Space for taking notes
- Directions for completing all the activities

Session Overview

- Welcome and Introductions
- Lesson 1: Scheduled Offerings
- Lesson 2: Segments
- Lesson 3: Registration
- Lesson 4: User Needs Management Tool
- Lesson 5: Record Learning Events
- Question and Answer

Session Objectives

At the end of this session, you should be able to:
- Create a scheduled offering of an instructor-led item
- Add, copy, and revise segments of scheduled offerings
- Manage resources for segments of scheduled offerings
- Demonstrate item and curriculum assignment functionality
- Use the Record Learning tool to record completed learning for users
Lesson 1:
Scheduled Offerings

Lesson 1 Objectives
After completing this lesson, you will be able to:

• Create a new scheduled offering
• Identify the main areas of a scheduled offering record
• Add and delete Ad Hoc facilities
• Add Instructors and equipment
• Copy or cancel a scheduled offering
• Enable user requests
Scheduling Management

Scheduling management is a term used to describe the process of creating scheduled offerings within the VA TMS for instructor-led/blended items or schedule blocks.

Scheduled Offering

Scheduled offerings are scheduled items used to manage resources, user registration, and course duration.

• Places an instance of the item on the calendar
• Allows resources to be associated to it
• Allows users to be registered into it

After creating instructor-led/blended items, the next step is to schedule them for a specific date, time, and location in order to track user registration.

Adding a New Scheduled Offering

• To add a new scheduled offering, select the item to schedule and determine a start date and time.
• Each scheduled offering is comprised of one or more segments. A segment is a block of time that can have resources assigned to it.
• Like items, scheduled offerings are made available to users via catalogs.
Ways to Add a New Scheduled Offering

1. Add Scheduled Offering Quick Link
2. Learning > Scheduled Offering > Add New
3. Add Scheduled Offering in the Search field
4. From the Item Record, choose “Schedule” in the Actions area

Ad Hoc Facilities

Add Ad Hoc Facilities can also be added from the Scheduled Offering page

Ad Hoc Facilities (Cont’d)

• Scheduled offerings support the assignment of an ad hoc facility for those offerings scheduled to take place at an external facility (e.g. hotel conference room).
• This is ideal when training is scheduled at locations that are not available as system records for re-use.
Delete Ad Hoc Facility
Admins can remove the ad hoc facility by selecting the link and then selecting Delete.

Add or Select – Location, Instructor and Equipment
• Select a location, instructor and/or equipment
• Or, select the green circle plus sign to add a new location, instructor and/or equipment

Custom Columns
Adding a custom column allows the admin to determine if the User will be selecting “Will you be utilizing Government reimbursed travel?” to the offering.
Document Attachment to Scheduled Offerings

- The provides the ability for scheduled offerings to have a separate association to documents, just as items do.
- Allows admins to post documents such as agendas and its specific offering related material at the scheduled offering level.

User View – Preferred Region and Facility

- Users can enter a preferred region and facility when requesting a scheduled offering.
- When region is selected, the facility list will default to those facilities in the selected region.
- No defined regions in VA TMS -- admins will need to identify and enter the information.
- Admins should not enable requests unless really necessary.

User View – Preferred Region

Users can request regions and facilities.
Enable User Requests – Admin View

Admins can choose to enable or disable region and facility requests.

Filter Requests

Admins can filter the request list from the offering to facilitate registering the right people into the right offerings.

User Search Selector

Two search selector parameters allow admins to search for users who have learning needs that fall within a specific date range.

– Required before
  – Required after
Item Requests Report

Admins can also run an Item Requests report which will generate a report to the point of contact.

Scheduled Offering Record Main Areas

Scheduled Offering Personalize Fields
Demonstration:
Add New Scheduled Offering

System Login
• Go to https://va-train2.plateau.com/learning/admin/login.do
• Enter your VA TMS TRAIN Admin Username
• Enter your VA TMS TRAIN Admin Password
Demonstration: Add New Scheduled Offering

1. Log in to the VA TMS.
2. Verify that the Admin tab is selected.
3. Select the Learning icon on top tool bar.
4. Select Scheduled Offerings tab on the left-hand side of the screen.
5. Select Search, with no additional fields selected. A full listing of Scheduled Offerings displays.
6. Select a Scheduled Offering from the list of displayed results by selecting the Scheduled Offering ID link.

Instructor Note: Once the scheduled offering record is displayed, describe the three main areas of the scheduled offering record as follows:

Core Area, located in the upper part of the scheduled offering

Admins can use the Core area of the selected scheduled offering record to update the basic attributes of the record (summary information). These attributes could include, for example, the offering description, domain, facility, registration settings, and any other fields deemed required by the global system administrators or added based on the Admins Personalized field preferences.

Select the View All link (bottom right of the Core Area) to see additional settings for the scheduled offering, including title, description, summary, extended summary, physical schedule, and registration.

Actions Area, located to the right of the Core Area

In the Actions area, Admins can bookmark, copy, cancel, or delete a scheduled offering. You can also send notifications to users about scheduled offerings. If you select the View Roster link, this quickly generates the Roster/Sign-In Sheet report that shows all users who are enrolled for that scheduled offering.

Related Area, located to the left of the Core Area

The Related area contains additional information regarding the scheduled offering, including registration information, associated catalogs, and segment details.

1. Log in to the VA TMS, from the Admin tab:
2. Select the Learning icon.
3. Select Scheduled Offerings tab on the left-hand side of the screen.
4. Select Add New link. This opens the Add New Scheduled Offering window.
5. In the Summary Information section: Select the Item type radio button.
6. Select the **Item ID magnifying glass** icon to search for the item to schedule (Domain = TRAIN).

7. Select an item from your search results.

8. Specify a **domain (TRAIN)** for the scheduled offering. **Instructor Note:** You may need to use the magnifying glass to search for the domain.

9. Enter a **description** for this scheduled offering.

10. Check the **Publish in all associated catalogs** checkbox. **State:** If you select the Publish in all associated catalogs checkbox, when you save the new scheduled offering the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes the scheduled offering visible and possibly available for users to self-register.

11. In the Schedule Information section: Select a **start date, start time, and time zone**.  
   **State:** The scheduled start date and time and the scheduled end date and time will appear below the scheduled information.

12. Select **Preview** to view the basic information for the offering (Optional).

13. In the Resources section: Select the **drop-down menu** next to the plus sign by **Facility**.

14. Select **Enter Ad Hoc Facility**.

15. Enter information for the ad hoc facility on this page.

16. Select **Apply Changes**.

17. Select “X” in the upper right-hand corner to return to the Add Scheduled Offering page.

18. You can remove what was added by selecting the link to the ad hoc facility and then selecting **Delete**.

19. If applicable, select the other resources associated with the scheduled offering: **location**, **instructor**, and **equipment**.  
   **Instructor Note:** Show the new equipment search criteria.

   **State:** Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.

20. The Resource Usage View drop down window will allow the Admin to review the Resource allocation by Location, Primary Instructor, or Equipment, which can aid in determining if there are resource conflicts.

21. In the Custom Resource section, if you need to add the custom column for “Will you be utilizing Government reimbursed travel?”, select the green and white plus sign and select the Search button initiating a generic search.

22. Select the checkbox for **Add**
23. Select the Add button at the top or bottom of the screen.

24. When you are finished, select Save.

25. If there are any warnings, the Warning Details screen displays. If this occurs, select Yes to continue.

26. The Schedule Offering record displays allowing you to make further configurations.

27. For use in future activities, record the system-generated Scheduled Offering ID, which is the numeric value located in the upper right corner of the Core area.

Job Aid: Available on the TMS Resource site.
Activity #1: Add New Scheduled Offering

System Practice
Activity #1: Add New Scheduled Offering

1. Log in to the VA TMS, from the Admin tab:

2. Select the Learning icon.

3. Select Scheduled Offerings tab on the left-hand side of the screen.

4. Select Add New link. This opens the Add New Scheduled Offering window.

5. In the Summary Information section: Select the Item type radio button.

6. Select the Item ID magnifying glass icon to search for the item to schedule (Domain = TRAIN).

7. Select an item from your search results.

8. Specify a domain (TRAIN) for the scheduled offering.

9. Enter a description for this scheduled offering.

10. Check the Publish in all associated catalogs checkbox. State: If you select the Publish in all associated catalogs checkbox, when you save the new scheduled offering the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes the scheduled offering visible and possibly available for users to self-register.

11. In the Schedule Information section: Select a start date, start time, and time zone. State: The scheduled start date and time and the scheduled end date and time will appear below the scheduled information.

12. Select Preview to view the basic information for the offering (Optional).

13. In the Resources section: Select the drop-down menu next to the plus sign by Facility.

14. Select Enter Ad Hoc Facility.

15. Enter information for the ad hoc facility on this page.

16. Select Apply Changes.

17. Select “X” in the upper right-hand corner to return to the Add Scheduled Offering page.

18. You can remove what was added by selecting the link to the ad hoc facility and then selecting Delete.

19. If applicable, select the other resources associated with the scheduled offering: location, instructor, and equipment.

20. The Resource Usage View drop down window will allow the Admin to review the Resource allocation by Location, Primary Instructor, or Equipment, which can aid in determining if there are resource conflicts.
21. In the Custom Resource section, if you need to add the custom column for “Will you be utilizing Government reimbursed travel?”, select the green and white plus sign and select the Search button initiating a generic search.

22. Select the checkbox for **Add**

23. Select the **Add** button at the top or bottom of the screen.

24. When you are finished, select **Save**.

25. If there are any warnings, the **Warning Details** screen displays. If this occurs, select **Yes** to continue.

26. The Schedule Offering record displays allowing you to make further configurations.

27. For use in future activities, record the system-generated **Scheduled Offering ID**, which is the numeric value located in the upper right corner of the Core area.

---

**Job Aid:** Available on the TMS Resource site.
Copy a Scheduled Offering

- Allows you to create duplicates
- Copies resources and registration parameters
- Can be scheduled to occur once or in recurrence

Demonstration:
Copy and Cancel Scheduled Offerings
Demonstration: Copying and Canceling Scheduled Offerings

Copying a Scheduled Offering

1. Log in to the VA TMS.
2. Select the Learning tab.
3. Select Scheduled Offerings tab on the left-hand side of the screen.
4. Search for and select a scheduled offering. Note: This demo can be completed with the scheduled offering that was created in the last demo.
5. Select the Copy link in the Actions area of the record.
6. Options are available to Copy the Group Instance, New Scheduled Offering to the Catalog, Related Documents, Use item default segment day numbers, and Copy to consecutive Days.
7. Additionally, there are options for: Copy Single, Copy Multiple-Daily Based, Copy Weekly Based and Copy Multiple – Monthly Based. Note: Review how options for date information change with selection.
8. Select the Copy Multiple–Monthly Based radio button.
9. Enter a New Start Date (use the next possible date) in the New Start Date textbox.
10. Enter “1” in the Schedule every ___ month(s) field.
11. Select the End after ___ schedules radio button.
12. Enter “3” in this field.
13. Check the Include Registration Cut-off Date checkbox.
14. Select Next.
15. On the Confirmation screen, check the Send Notification checkbox.
16. Select Copy. Note the new scheduled offering IDs and start dates for the next exercise.

Canceling a Scheduled Offering

1. Enter search criteria to search for and locate one of the scheduled offerings just copied.
2. Select Cancel the Scheduled Offering from the Actions area of the Scheduled Offering record. The default information may or may not be the scheduled offering to be cancelled, adjust as needed.
3. Select Next.
4. Admins are not required to complete Step 2: Edit Realized Costs as this feature is not currently available in the VA TMS.
5. Select **Inactivate the Scheduled Offering. Note:** Admins would also select additional options for notifications, and Add enrolled, waitlisted and pending Users to the request for this item, as needed.

6. Select **Next** again.

7. On the Confirmation screen, select **Finish.**

8. On the Finished Confirmation Page, select **OK.**
Activity #2: Copy and Cancel Scheduled Offerings

System Practice
Activity #2: Copy and Cancel Scheduled Offerings

Copying a Scheduled Offering

1. Log in to the VA TMS.
2. Select the Learning tab.
3. Select Scheduled Offerings tab on the left-hand side of the screen.
4. Search for and select a scheduled offering. **Note:** This demo can be completed with the scheduled offering that was created in the last demo.
5. Select the Copy link in the Actions area of the record.
6. Options are available to Copy the Group Instance, New Scheduled Offering to the Catalog, Related Documents, Use item default segment day numbers, and Copy to consecutive Days.
7. Additionally, there are options for: Copy Single, Copy Multiple-Daily Based, Copy Weekly Based and Copy Multiple – Monthly Based. **Note:** Review how options for date information change with selection.
8. Select the Copy Multiple—Monthly Based radio button.
9. Enter a New Start Date (use the next possible date) in the New Start Date textbox.
10. Enter “1” in the Schedule every ___ month(s) field.
11. Select the End after ___ schedules radio button.
12. Enter “3” in this field.
13. Check the Include Registration Cut-off Date checkbox.
14. Select Next.
15. On the Confirmation screen, check the Send Notification checkbox.
16. Select Copy. Note the new scheduled offering IDs and start dates for the next exercise.

Canceling a Scheduled Offering

1. Enter search criteria to search for and locate one of the scheduled offerings just copied.
2. Select Cancel the Scheduled Offering from the Actions area of the Scheduled Offering record. The default information may or may not be the scheduled offering to be cancelled, adjust as needed.
3. Select Next.
4. Admins are not required to complete Step 2: Edit Realized Costs as this feature is not currently available in the VA TMS.
5. Select **Inactivate the Scheduled Offering. Note:** Admins would also select additional options for notifications, and Add enrolled, waitlisted and pending Users to the request for this item, as needed.

6. Select **Next** again.

7. On the Confirmation screen, select **Finish.**

8. On the Finished Confirmation Page, select **OK.**
Knowledge Check

A scheduled offering is:

a) An instance of an item placed on a learning calendar
b) An assignable unit that a user must complete
c) A grouping of curricula
d) None of the above

Knowledge Check

What are the main areas of a scheduled offering record?

a) Home, Learning, and Status
b) Curricula, Actions, and Records
c) Home, Items, and Related
d) Core, Actions, Related

Questions?
Lesson 2: Segments

Lesson 2 Objectives
After completing this lesson, you will be able to:

• Modify segments of a scheduled offering
• Assign resources to a segment
• Record attendance for a specific segment

Segments
• A segment is a block of time within a scheduled offering primarily used for resource allocation
• If a user is registered in a scheduled offering, he/she is registered in all segments
• Segments contain any applicable resources, such as locations, equipment, and instructors
Two Views in the Segment Section

- Lists all segments and assigned resources in text format
- The only view in which segments can be copied
- The only view in which an admin can record attendance

List View

- Shows segments in graphical calendar format
- Segment times and dates can be altered by dragging and resizing segment boxes
- View can be altered to reflect day, week, or monthly view

Calendar View
Scheduling Management

Resources Assigned to Segments

- A segment can have multiple resources of the same type, such as two instructors
- Once a resource is assigned to a segment, it is booked
- If another admin attempts to schedule the resource during the same timeframe, VA TMS will alert him/her that there is a conflict

Adding Resources to a Segment

You can set up scheduled offering resources in the VA TMS. Resources include:

- Instructors
- Equipment
- Materials
- Facilities
- Locations

Custom Resources Search Defaults

- Searches on custom resources will default to the assigned custom resource types on the Edit Segment of Scheduled Offering page.
- If a custom resource is not associated with the facility or location, all records will show unless there are domain restrictions that apply.
Add Custom Resource

Record Attendance
Select the Attendance link next to any segment displayed in List view.

1. Select Attendance checkbox to record attendance.
2. Enter comments, if desired.
3. Select Apply Changes.
4. For multiple segments, select Copy to Same Day Segments.
Demonstration: Segments
Demonstration: Segments

1. Log in to the VA TMS.
2. Select the Learning tab.
3. Select Scheduled Offerings tab on the left-hand side of the screen.
4. Search for and select a scheduled offering you created previously.
5. Now that the scheduled offering record is displayed, let’s discuss the Segment areas.

Assigning Instructors

Once the instructor is identified, he or she can be assigned to the segment(s) within a scheduled offering. To do that, select Segments, select Add New Segments, and then select Add Instructor from the drop-down menu. The VA TMS returns all instructors in the search results. The search results include a column that displays the resource availability, which can help when determining the segment resource allocation:

- Not Available
- Available for entire scheduled offering
- Available for current segment
- Blank (when segment information is not available)

NOTE: The search for authorized instructors is an option per Item—so it’s not necessary to clear out the item information from the filter if you want to search for an instructor who is not specifically authorized to teach this item. To perform “search and select” search filters, select the Search tab, enter your search criteria, then select Search.

Assigning Locations

When the training location has been identified, you can assign it to the segment(s) within a scheduled offering. To assign locations to segments, select Add New Segments, Add Resources, then Add Location from the drop-down menu. The VA TMS returns all locations in the search results.

Assigning Equipment

Equipment is any reusable resource that is used in the delivery of scheduled offerings. These include overhead projectors, television monitors, classroom laptops, etc. Equipment can be associated with locations and facilities. You may schedule equipment that does not come with the location that has been scheduled. To schedule these additional resources, select the Add Resources button for the segment in which you want to schedule them.
Resource Conflicts

If you select a resource that is already scheduled for the same time in which you are trying to schedule it, a warning message displays. You can view the conflict and decide to continue and schedule that resource or search for and select another. Instructor Note: You may need to “force” a conflict to show users how this feature works.

Apply to All Segments

In Edit Segment, Admins can add all resources that will be needed to deliver the segment. You can also select Apply to All Segments to copy the resources that you have applied to the segment that you’re modifying to all other segments of the scheduled offering. Then select Save & Close.

Additional Segments

Once a scheduled offering is created, Admins can add or remove segments from that scheduled offering. The default segment structure is established through the Segments tab of the item record. You can add a new segment to the scheduled offering by either selecting the Add New Segments button or by selecting the Copy Segments icon. The Copy Segments icon is only available in list view.
Activity #3: Segments

System Practice
Activity #3: Segments

Assigning Resources to Segments

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1.
3. Select Search.
4. Select the scheduled offering ID link to access the scheduled offering in edit mode.

   **Note:** If you haven’t navigated away from the scheduled offering from the previous activity, you do not need to search for it. If you have, you can also access the scheduled offering record from your Recents panel.
5. Select the Segments tab from the Related area.
6. In list view, select the segment link.
7. For the selected segment, select a primary instructor.
8. Select Add Resources.
9. Select Add Instructor.
10. Select the corresponding checkbox to select the instructor to add for the segment.
11. Select Add.
12. Identify the primary instructor and select the corresponding radio button in the Primary column.
13. Select Save. **NOTE:** When adding an instructor, the VA TMS returns only instructors who are authorized to teach this item.
14. Select a primary location.
15. Select Save and Close. **NOTE:** If there are multiple segments and one or more of the segments do not have a primary instructor and/or location designated, the system displays a warning pop-up box. Select OK to continue.

Adding a Second Instructor to a Segment

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1 and select Search.
3. Select the scheduled offering ID link to access the scheduled offering in edit mode.
4. Select the Segments tab from the Related area.
5. In calendar view, select the segment you want to add a second instructor.
6. Select Add Resources and select Add Instructor from the drop-down menu.
7. Select the corresponding checkbox to select the second instructor to add for the segment.
8. Select Add.
9. Identify the primary instructor and select the corresponding radio button in the Primary column.
10. Select Save.
11. View all the instructors scheduled to teach during the segment. Note the primary instructor.
12. Select Cancel to return to the calendar or list view. NOTE: If you did not select Save, in step 12, select Save and Close to save your changes and return to the segment calendar or list view.

Adding Segments to a Scheduled Offering

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1.
3. Select Search.
4. Select the scheduled offering ID link to access the scheduled offering in edit mode.
5. Select the Segments tab from the Related area.
6. Select the Add New Segments button.
7. Enter the segment information:
   - Start date and time
   - End date and time
   - Segment description (optional but recommended)

Copy Daily Segments

1. Navigate to the segment you just created.
2. Select the List View icon.
3. Next to the segment just created, select the Copy Segments icon.
4. Enter the number of times to copy the segment. NOTE: The system is copying all segments scheduled on the same date of the segment you selected, not just the segment you selected. This will create each duplicate segment(s) on a different day. You can modify the new segment dates, times, and time zones once they are created.
5. Select Copy.
6. View the new segment(s). **NOTE:** The resources assigned to the original segment are carried over to the new segment(s).

7. Modify the description for each new segment.

8. Select **Save and Close.**

9. Change the end time of one of the new segments.

10. Select **Save and Close.**

Job Aid: Available on the TMS Resource site
Knowledge Check

What are the two different ways you can view segments?

a) Limited view and Extended view
b) Short view and Detailed view
c) List view and Calendar view
d) Resource view and Schedule view

Knowledge Check

List three types of resources that can be assigned to a segment.

Questions?
Lesson 3: Registration

Lesson 3 Objectives
After completing this lesson, you will be able to:

• Define the four registration statuses
• Register users for a scheduled offering
• Control supervisors’ rights to enroll users
• Enable autofill, waitlist, and set class size
• Reserve slots for a scheduled offering
• Use the Registration Assistant tool

How Users Register

• Self-Register
• Supervisor registers
• Admin registers
Registration Statuses

• Enrolled
  – The user has a seat in the scheduled offering
• Waitlisted
  – The user is waiting for a seat to open
• Cancelled
  – The user does not have a seat
• Pending
  – The user is “pending” approval in the VA TMS

Demonstration: Registration
Demonstration: Registration

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for the scheduled offering you’ve been using throughout the session (Use “Exact” and the Scheduled Offering ID, or just use Recents or Bookmarks).
3. Select the Registration section of the Related area.
4. Select the Add Users button and choose Add Users.
5. Enter search criteria to search for users; User ID contains “Train.”
7. Select the Add checkbox next to the user you want to register.
8. Select Add.
9. Confirm that the user has been added by verifying the user’s name has been added in the Enrolled section.

Job Aid: Available on the TMS Resource site.
Scheduling Management

Activity #4: Registration

System Practice
Activity #4: Registration

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for the scheduled offering you’ve been using throughout the session (Use “Exact” and the Scheduled Offering ID, or just use Recents or Bookmarks).
3. Select the Registration section of the Related area.
4. Select the Add Users button and choose Add Users.
5. Enter search criteria to search for users; User ID contains “Train.”
7. Select the Add checkbox next to the user you want to register.
8. Select Add.
9. Confirm that the user has been added by verifying the user’s name has been added in the Enrolled section.

Job Aid: Available on the TMS Resource site.
Control Supervisors’ Rights to Enroll Users

- A single setting called “User Self Registration” on the Item and Scheduled Offering record controls users’ rights to self-register.
- There is also a “Supervisor Registration” setting in the Item Record summary information:
  - If Supervisor Registration is set to Yes, then the supervisor can register users for training. If set to No, then the supervisor cannot register users.
  - This feature defaults to Yes on all new items.

Enable Auto Fill, Waitlist and Set Class Size

- Setting Auto Fill Registration allows users who have been waitlisted for a class to be automatically registered.
- Enable Users to Waitlist allows users to be added to a waiting list for an item or scheduled offering.
- Setting Minimum Registration sets class size and allows consistent use of resources.
- Setting Maximum Registration sets class size assures that proper assets for the classroom size are not exceeded.

Demonstration: Controlling Supervisors’ Rights to Enroll Users
Demonstration: Controlling Supervisors’ Rights to Enroll Users

From the admin home page:

1. Select Learning.
2. Select Scheduled Offerings.
3. Enter search criteria to search for the scheduled offering you’ve been using throughout the session (Use “Exact” and the Scheduled Offering ID, or just use Recents or Bookmarks).
4. Select View All in the Core area of the record.
5. Scroll down to Auto Fill Registration and select Yes from the drop-down list.
6. Scroll down to Waitlist and select Yes from the drop-down list.
7. Scroll down to Maximum Registration and enter a number
8. Move down to Minimum Registration and enter a number.
9. Scroll down to the Self Registration field and select Yes from the drop-down list.
10. Scroll down to the Supervisor Registration field and select Yes from the drop-down list.
11. Select Save.
Slots

- Slots allow you to reserve seats in a scheduled offering without having to register specific users
- As slots are reserved, the number of open seats decreases by that number

Demonstration: Slots
Demonstration: Slots

NOTE: If short on time, you can demo slots with the previous Registration demonstration.

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for the scheduled offering created (Use “Exact” and the Scheduled Offering ID you created, or just use Recents or Bookmarks).
3. Select the Registration section of the Related area.
4. Select Add Slots from the drop-down menu.
5. In the Add Slots window, select the Organization ID (Human Resources) and the number of slots. Then select Save.

Once slots are reserved, the number of open seats decreases by that number. For example, if there are 15 seats available in the class and the admin reserves three slots, 12 seats remain available for other users.
Activity #5: Slots

System Practice
Activity #5: Slots

Reserving Slots for a Scheduled Offering:

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1.
3. Select **Search**.
4. Select the **scheduled offering ID** link to access the record in edit mode.
5. Select the **Registration** tab from the Related area.
6. Select **Add to Registration** menu (green plus sign next to **Add Users**).
7. Select **Add Slots** from the drop-down menu.
8. Select an organization for which to reserve the slots.
9. Enter the number of slots to be reserved for the organization.
10. Enter the reservations date (defaults to current date).
11. Enter the reservation time (defaults to current time).
12. Select **Save**.
The Registration Assistant is a tool that helps streamline the process of registering users from the admin side of the VA TMS.

Demonstration: Registration Assistant
**Demonstration: Registration Assistant**

1. Navigate to Learning > Tools > Registration Assistant to access the tool.
2. Select Register Users.
3. Select Next.
4. Select the magnifying glass for Scheduled Offering.
5. Enter search criteria for the scheduled offering.
7. Select the scheduled offering.
8. Select Next.
9. Select add one or more from list.
10. Enter search criteria for the user(s) you want to register.
11. Select Search.
12. Select the Add checkbox for the user(s) you want to register.
13. Select Add.
14. Select Next.
15. Add comments, if required.
16. Select Next.
17. Select Next (Admins don’t add any financial data at this time).

Job Aid: Available on the TMS Resource site.
Activity #6: Registration Assistant

System Practice
Activity #6: Registration Assistant

1. Navigate to Learning > Tools > Registration Assistant to access the tool.
2. Select Register Users.
3. Select Next.
4. Select the magnifying glass for Scheduled Offering.
5. Enter search criteria for the scheduled offering.
7. Select the scheduled offering.
8. Select Next.
9. Select add one or more from list.
10. Enter search criteria for the user(s) you want to register.
11. Select Search.
12. Select the Add checkbox for the user(s) you want to register.
13. Select Add.
14. Select Next.
15. Add comments, if required.
16. Select Next.
17. Select Next. (Admins don’t add any financial data at this time.)

Job Aid: Available on the TMS Resource site.
**Knowledge Check**

All of the user registration options on a scheduled offering are determined within the Registration tab.

a) True

b) False

---

**Knowledge Check**

What are the four registration statuses in the VA TMS?

---

**Knowledge Check**

Slots allow you to reserve seats in a scheduled offering without having to register specific users.

a) True

b) False
Lesson 4 Learning Objectives

- Demonstrate completing an Item assignment
- Demonstrate completing a Curriculum assignment
**User Needs Management Tool**

- Learning is assigned for mandatory course such as Privacy, No Fear, and Sexual Harassment.
- Administrators can assign learning to a user via:
  - User Needs Management Tool
  - The Automated Assignment Profiles process
  - Directly on the Learning Plan tab of a user record

**User Needs Management**

- Navigate to Users > Tools > and select the User Needs Mgmt link

**Step 1 – Select Management Action**

From the User Needs Management tool
- Select the radio bullet for the action: Add Curricula
- Select the Next button
Step 2 – Select Users

Using the “add one or more from list” link

Search Criteria

Enter necessary search criteria and select Search

Select Users

- Select one or more users, and select the Add button
Verify Selections

- Validate selected users
- Remove users to correct invalid selections
- Apply Changes, and select Next

Step 3 – Adding Curricula

Select “add one or more from list” to search for criteria

Search Criteria

- Enter the search criteria using one or more of the search fields
- Select Search
Select Criteria

- Select the Checkbox for the criteria
- Select the Add button

Validate Curricula

- Validate curricula selection
- Remove Curricula to correct invalid selections
- Apply Changes, and select Next

Step 4 – Edit Assign Dates

- Select the Calendar icon or enter the date the curricula is being assigned
- Select Next
Step 5 – Complete User Needs Management

- Select Run Job Now or Schedule Job
- When job has completed successfully message appears

Demonstration: User Needs Management Tools
**Demonstration: User Needs Management Tool**

The following demonstration represents the process to Add Curricula using the User Needs Mgmt tool.

1. Navigate to Users.
2. Select Tools.
3. Select the User Needs Mgmt link.
4. From the options displayed, select Add Curricula radio button.
5. Select Next.
6. Select the add one or more from list link.
7. Select search criteria, use the Last Name search option (DMLMU).
8. Select the correct Users by checking the corresponding checkboxes on the right.
9. Select Add.
10. Validate the selected users.
11. Add or Remove additional users and Apply Changes as necessary.
12. Select Next.
13. Select the add one or more from list link.
14. Enter chosen criteria for searching (Domain = TRAIN)
15. Select Search
16. Select the correct Curricula by checking the corresponding checkboxes on the right.
17. Select Add.
18. Validate the selected curricula.
19. Add or Remove additional curricula and Apply Changes as necessary.
20. Select Next.
21. Select the Calendar icon to choose the date the curricula will be assigned, or enter the date using the MM/DD/YYYY format in the Assign Date field.
22. Select Next.
23. Two options display: Run Job Now or Schedule Job. **Note:** Business processes recommend selecting Schedule Job to run later if it will be affecting more than 5,000 records.

When the job finishes running, a message displays indicating the job was successful. This can be validated by checking the User record > Related > Learning History area.
Activity #7: Assign Items and Curricula

System Practice
**Activity #7: User Needs Management Tools**

**Assign Items and Curricula:**

1. Navigate to Users.
2. Select Tools.
3. Select the User Needs Mgmt link.
4. From the options displayed, select Add Curricula radio button.
5. Select Next.
6. Select the add one or more from list link.
7. Select search criteria, use the Last Name search option (DMLMU).
8. Select the correct Users by checking the corresponding checkboxes on the right.
9. Select Add.
10. Validate the selected users.
11. Add or Remove additional users and Apply Changes as necessary.
12. Select Next.
13. Select the add one or more from list link.
14. Enter chosen criteria for searching (Domain = TRAIN)
15. Select Search
16. Select the correct Curricula by checking the corresponding checkboxes on the right.
17. Select Add.
18. Validate the selected curricula.
19. Add or Remove additional curricula and Apply Changes as necessary.
20. Select Next.
21. Select the Calendar icon to choose the date the curricula will be assigned, or enter the date using the MM/DD/YYYY format in the Assign Date field.
22. Select Next.
23. Two options display: Run Job Now or Schedule Job. **Note:** Business processes recommend selecting Schedule Job to run later if it will be affecting more than 5,000 records.

When the job finishes running, a message displays indicating the job was successful. This can be validated by checking the User record > Related > Learning History area.
Knowledge Check

What tool can Admins use to record learning for many users at once?

a) Launch Proxy  
b) Registration Assistant  
c) User Needs Mgmt  
d) Segments

Questions?

Lesson 5: Record Learning Events
Lesson 5 Objectives
After completing this lesson, you will be able to:

• Define a learning event
• Record a learning event for a scheduled offering

Learning Events
A learning event is the record of:

• A completed item
• An unsuccessful attempt to complete an item
• A record of attendance or completion of any external event considered important enough to document (but not related directly to learning needs)

Record Scheduled Offering Before End Date
• Admins may record learning for a scheduled offering before the offering end date.
• They may not record learning before the offering start date.
• They will navigate to:
  Users > Tools > Record Learning-Multiple
Types of Learning Events

- Learning events can be:
  - Item-based events
  - External events

Data Recorded in Learning Event

- A learning event captures data such as:
  - User information
  - Item title
  - Item status (grade or code)
  - Completion date/time
  - Completion status code

Learning Event Codes

Completion Status Codes may include:

- Pass
- Fail
- Attend
- Complete
- Waived (grants completion based on experience or because concept/skill is covered in another course)
Demonstration: Recording a Learning Event
Demonstration: Recording a Learning Event

1. From the Quick Links section of the Admin home page, select **Record Learning – Multiple**.

2. You can also access the **Record Learning – Multiple** tool by navigating to **Users > Tools > Record Learning – Multiple**.

**Instructor Notes:** Continue with entering, left side: **Item Type= VA > Item Type ID (Search for an Item) > Add.** From right side: **User ID > Add > Next > Verify completion info > Select Grade from drop down > Apply Changes > Next > Assess based on item setting > Submit**

3. The Record Learning – Multiple tool can record learning events for multiple items for multiple users if the events that you want to record are the same type (for example, all items or all scheduled offerings).
Activity #8: Recording a Learning Event

System Practice
Demonstration: Recording a Learning Event from Scheduled Offering Page

From the admin home page:

1. Select **Learning**.
2. Select **Scheduled Offering**.
3. Enter search criteria for the scheduled offering.
4. Select **Search**.
5. Select the scheduled offering from the search results.
6. In the **Actions** area of the Scheduled Offering record, select **Record Learning**.
   **Reminder:** To record learning for a Scheduled Offering, the offering must either have begun or be complete.
7. Select **Users** for whom you want to record learning.
8. Select **Next**.
9. Enter **Comments** and **Status** of the learning event for each user. **Note:** VA TMS does not recognize grades so leave this field blank. **Note:** Admins can also apply a learning status for all users by selecting the status from the **Apply Default Status** dropdown box, then select the **Apply** button.
10. Select **Next**.
11. Select **Next**. **Note:** The VA TMS does not recognize costs so leave this page blank.
12. Select **Finish**.
13. Select **OK**.
14. A status will display. Admins may then print or email notification of the completion.
Record Learning Events from Scheduled Offering Page
• Admins can record a learning event from the scheduled offering page.
• The wizard populates the scheduled offering details and the enrolled users.
• To use this feature, administrators must have the required role to record learning events.

Demonstration:
Recording a Learning Event from Scheduled Offering Page
Activity #8: Record a Learning Event

1. Navigate to Users > Tools > Record Learning – Multiple.
2. Select the Scheduled Offering radio button.
3. Select the Scheduled Offering ID select icon to search for and select a scheduled offering.
4. Select Add. The scheduled offering displays.
5. Search and add users by selecting the User ID icon and select Add or select Auto Fill from Registration to populate the user list from registered users. The list of users displays.
6. Select Next.
7. Select expand next to the scheduled offering to view all user records.
8. Enter Completion Status, and Hours next to the scheduled offering title.
9. Select Apply Changes to apply to all user records.
10. Make changes as necessary to individual user records.
11. Select Next.
12. Review the summary of the learning history to be recorded by the system.
13. Select Submit.
Activity #9: Record a Learning Event from Scheduled Offering Page

System Practice
Activity #9: Record a Learning Event from Scheduled Offering Page

From the admin home page:

1. Select **Learning**.
2. Select **Scheduled Offering**.
3. Enter search criteria for the scheduled offering.
4. Select **Search**.
5. Select the scheduled offering from the search results.
6. In the **Actions** area of the Scheduled Offering record, select **Record Learning**.
7. Select **Users** for whom you want to record learning.
8. Select **Next**.
9. Enter **Comments** and **Status** of the learning event for each user. **Note:** VA TMS does not recognize grades so leave this field blank.
10. Select **Next**.
11. Select **Next. Note:** The VA TMS does not recognize costs so leave this page blank.
12. Select **Finish**.
**Knowledge Check**

What data can be recorded in a learning event?

a) Completion date and status
b) User information
c) Item information
d) All of the above

**Knowledge Check**

Admins can record learning events for users who were not registered in the scheduled offering originally.

a) True
b) False

**Related Reports**

The following are reports in VA TMS that relate to scheduled offerings:

- Scheduled Offering Roster (Print from Scheduled Offering Record)
- Scheduled Offering Data
- Learning Calendar
- Registration Status
Questions?

Evaluation & Self Certification Reminder

• You will be prompted to complete the Evaluation and then you can complete your Self-Certification for this session.

• Evaluations can be found on your My Learning List.
THIS PAGE LEFT BLANK INTENTIONALLY