



TMS
2.0

VA

Admin Job Aid

Assignment Profiles

Admin Job Aid: Assignment Profiles

(Revision date: September 1, 2020)

Purpose

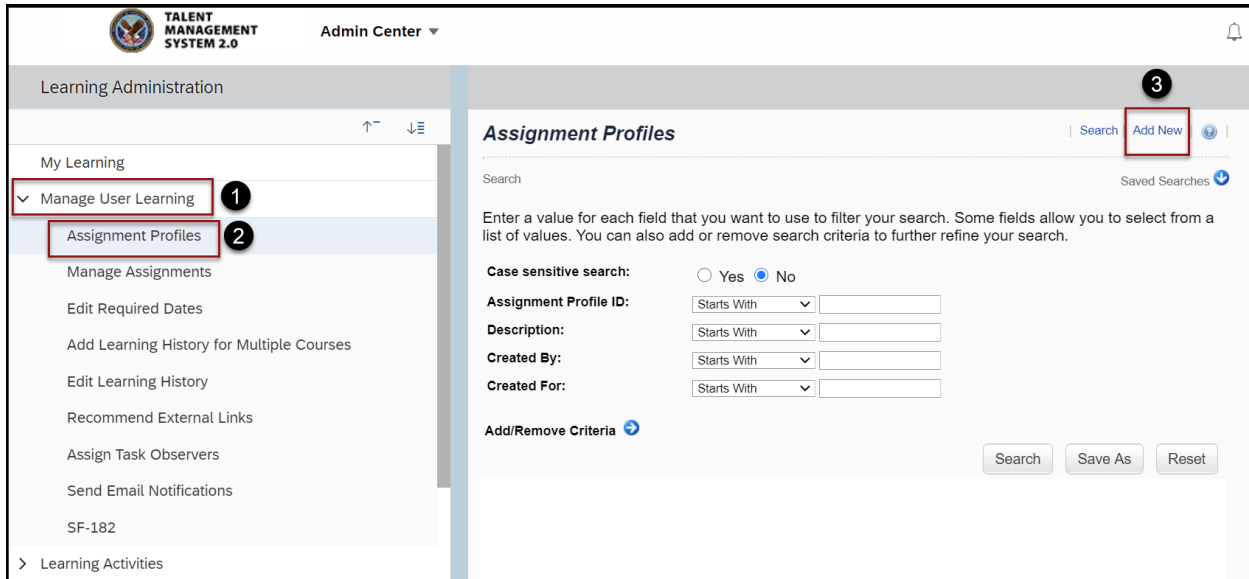
The purpose of this job aid is to guide you through the step-by-step process of creating an Assignment Profile. Assignment Profiles are groupings of users created for the purpose of automatic assignment. Each profile contains one or more groups, with each group containing one or more rules. All rules within a group must be matched for a user to match its parent group and, therefore, be placed in the Assignment Profile. However, a user must only meet the criteria for one group to be placed in the profile. In other words, rules within a group have an “and” relationship while groups within an Assignment Profile have an “or” relationship.

In this job aid, you will learn how to:

- Task A. Create an Assignment Profile
- Task B. Create and Manage Rules
- Task C. Associate Learning and Execute Changes

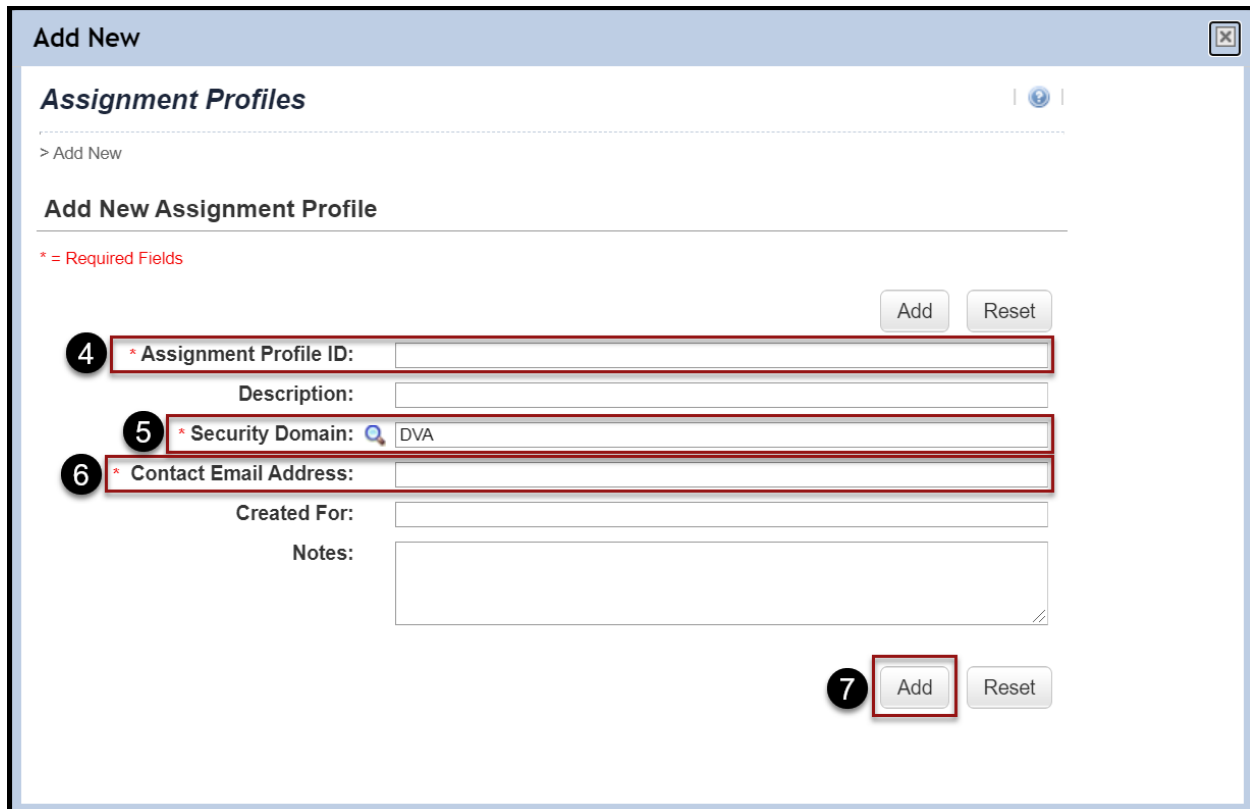
Task A. Create an Assignment Profile

1. Select **Manage User Learning** to expand the menu of options.
2. Select **Assignment Profiles**.
3. Select **Add New**.



The screenshot displays the TMS Admin Center interface. The top navigation bar includes the TMS logo, 'Admin Center', and a notification bell. The main content area is titled 'Learning Administration' and features a sidebar menu on the left. The sidebar menu is expanded to show 'Manage User Learning' (1) and 'Assignment Profiles' (2). The main content area is titled 'Assignment Profiles' and includes a search bar, a search button, and an 'Add New' button (3). Below the search bar, there are several filter options: 'Case sensitive search' (radio buttons for Yes and No), 'Assignment Profile ID' (Starts With dropdown), 'Description' (Starts With dropdown), 'Created By' (Starts With dropdown), and 'Created For' (Starts With dropdown). At the bottom of the filter section, there is an 'Add/Remove Criteria' button and three buttons: 'Search', 'Save As', and 'Reset'.

4. Enter an **Assignment Profile ID**.
5. Enter the **Security Domain**.
6. Enter the **Contact Email Address** of the person responsible for the Assignment Profile record.
NOTE: The Description, Created For, and Notes fields are not required.
7. Select the **Add** button.



Add New

Assignment Profiles

> Add New

Add New Assignment Profile

* = Required Fields

4 * Assignment Profile ID:

Description:

5 * Security Domain:

6 * Contact Email Address:

Created For:

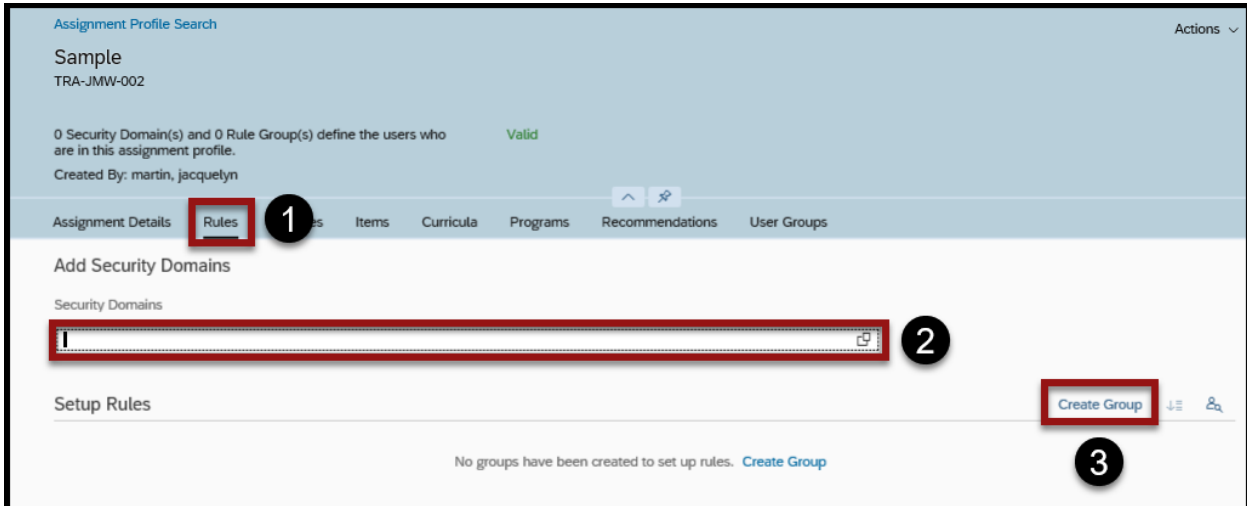
Notes:

7 Add Reset



Task B. Create and Manage Rules

1. Once the Assignment Profile record has been created, select **Rules** to create and manage rules.
2. Enter the **Security Domain(s)**.
3. Select **Create Group**.



Assignment Profile Search Actions ▾

Sample
TRA-JMW-002

0 Security Domain(s) and 0 Rule Group(s) define the users who are in this assignment profile. Valid

Created By: martin, jacquelyn

Assignment Details **Rules** 1 Items Curricula Programs Recommendations User Groups

Add Security Domains

Security Domains

1

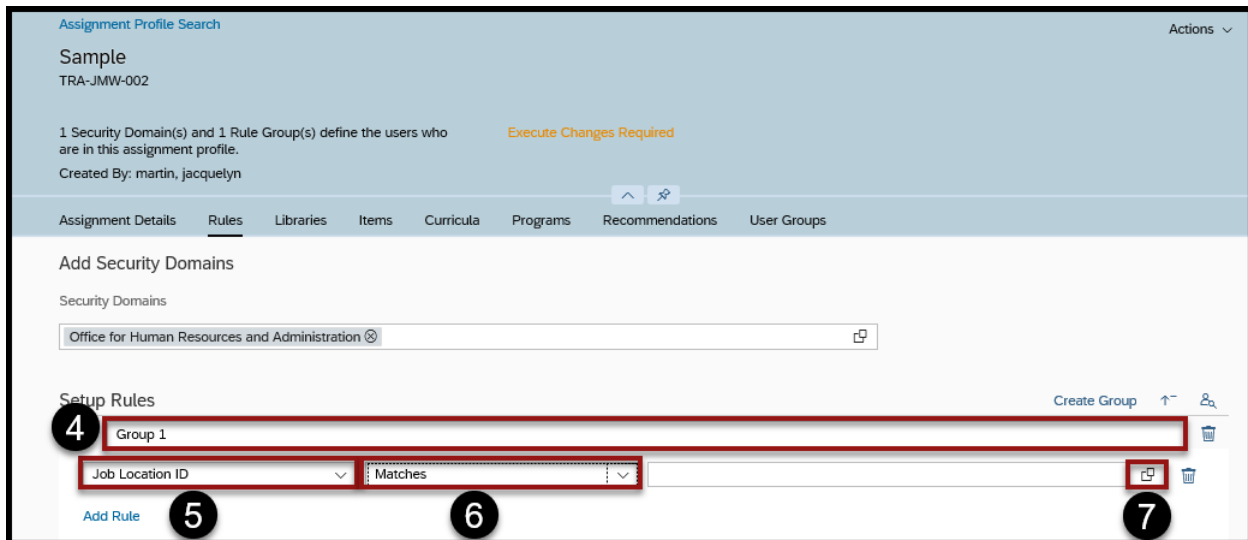
2

Setup Rules

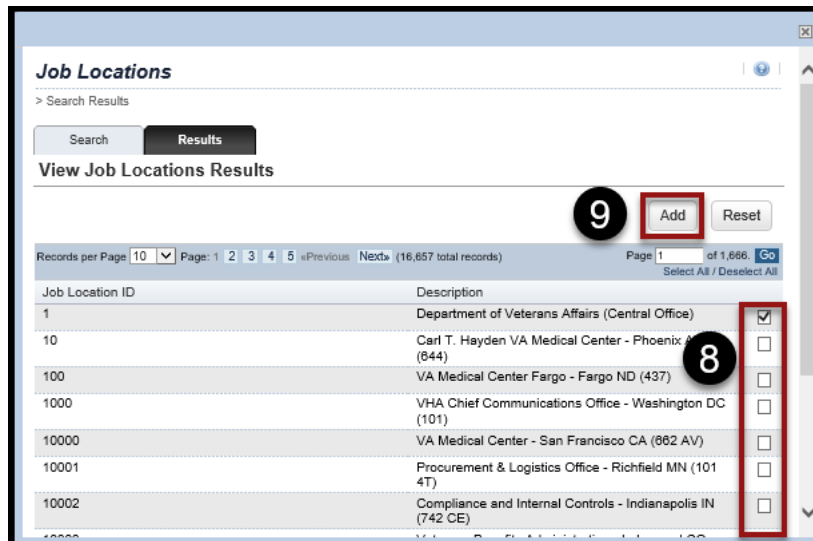
Create Group 3

No groups have been created to set up rules. [Create Group](#)

4. Enter a name for the Group.
5. Select an **Attribute** from the drop-down list.
6. Select an **Operator** from the drop-down list.
7. Select the **Search Icon** in the Value field if you are not sure what to put there.

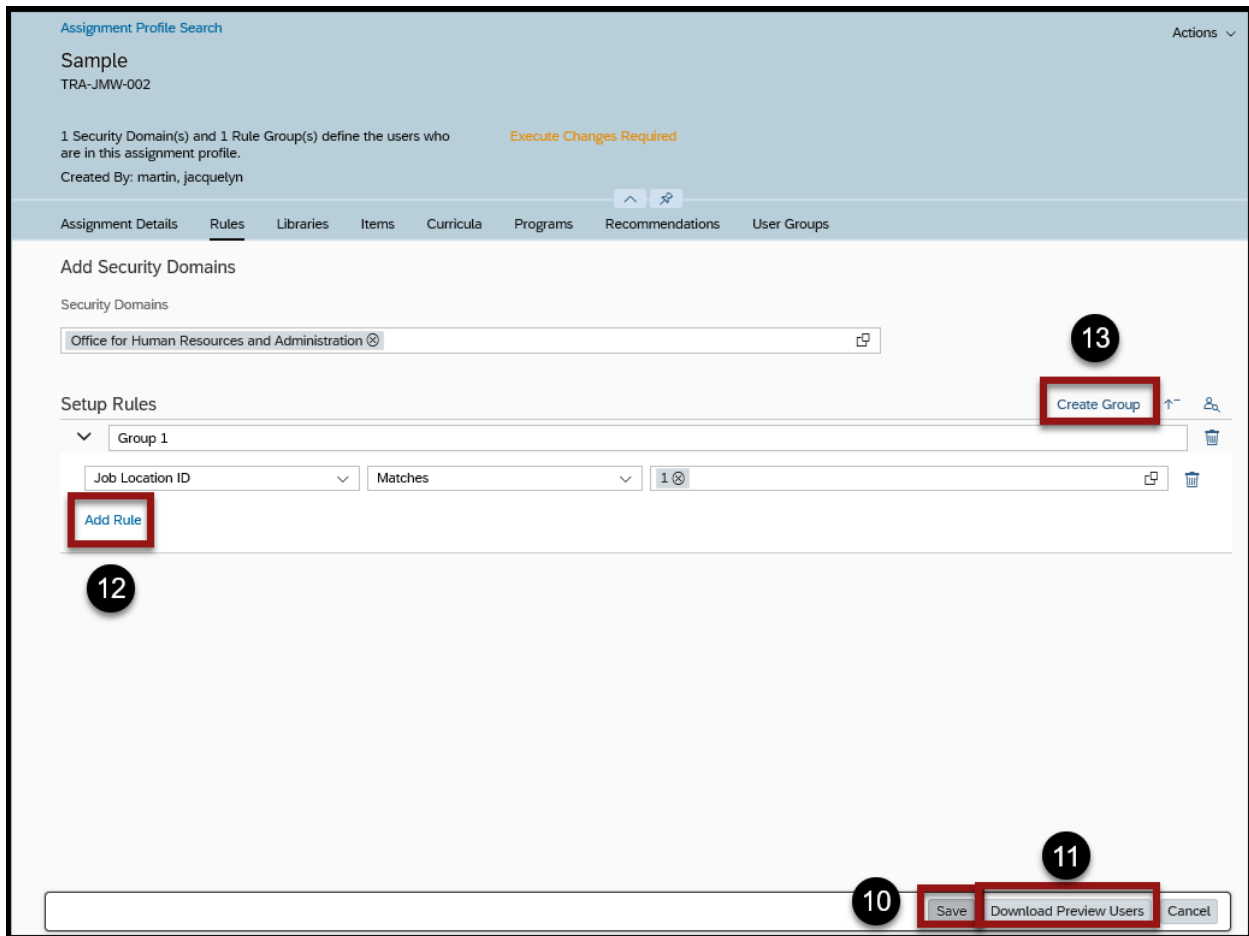


8. Check the box for the Value you want to select.
9. Select the **Add** button.



Job Location ID	Description	Select
1	Department of Veterans Affairs (Central Office)	<input checked="" type="checkbox"/>
10	Carl T. Hayden VA Medical Center - Phoenix (844)	<input type="checkbox"/>
100	VA Medical Center Fargo - Fargo ND (437)	<input type="checkbox"/>
1000	VHA Chief Communications Office - Washington DC (101)	<input type="checkbox"/>
10000	VA Medical Center - San Francisco CA (862 AV)	<input type="checkbox"/>
10001	Procurement & Logistics Office - Richfield MN (101 4T)	<input type="checkbox"/>
10002	Compliance and Internal Controls - Indianapolis IN (742 CE)	<input type="checkbox"/>

10. Select **Save**.
11. Select **Download Preview Users** to see a list of users who match the criteria.
12. If you want to add a rule within a group, select **Add Rule**.
13. If you want to add another group, select **Create Group**.



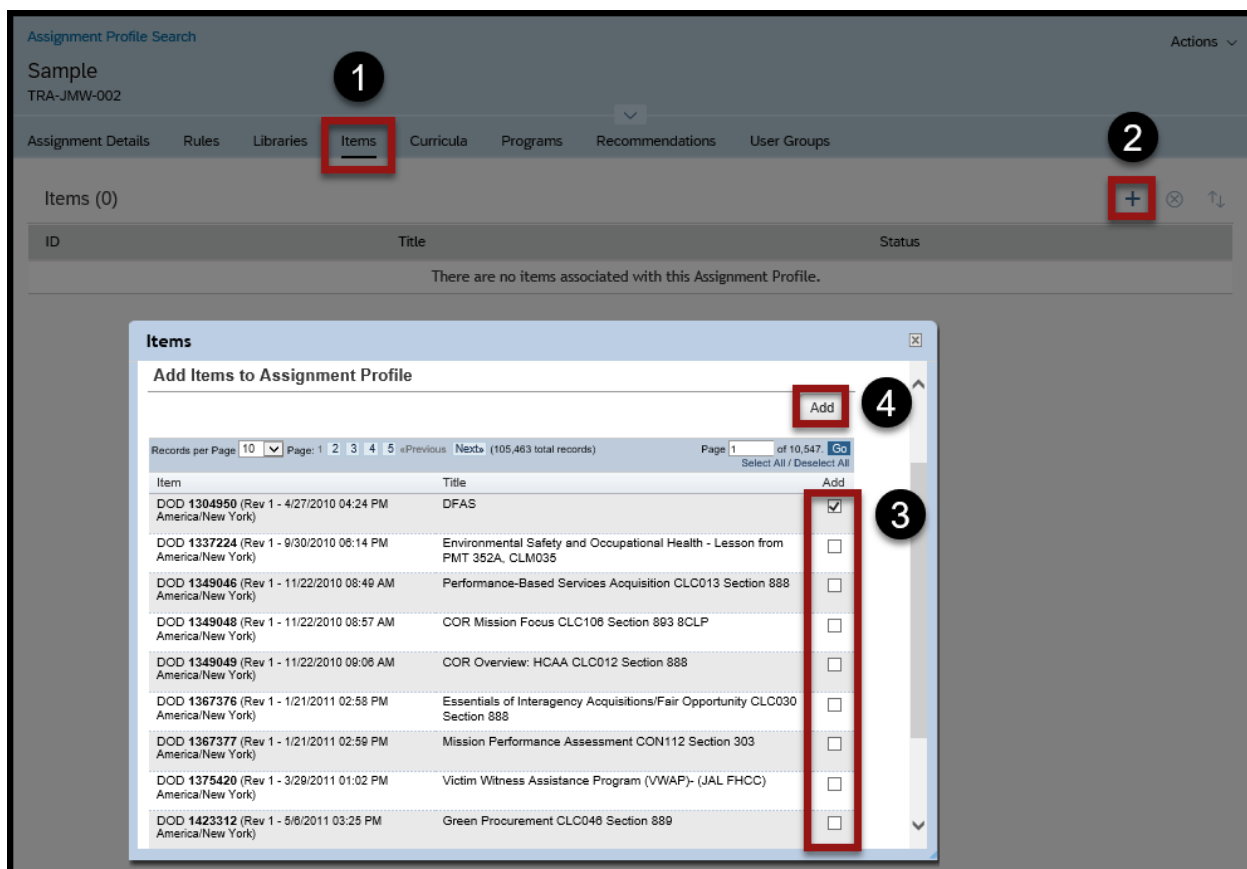
The screenshot shows the 'Assignment Profile Search' interface for a profile named 'Sample' (TRA-JMW-002). The interface includes a navigation bar with tabs for 'Assignment Details', 'Rules', 'Libraries', 'Items', 'Curricula', 'Programs', 'Recommendations', and 'User Groups'. The 'Rules' tab is active, showing a section for 'Add Security Domains' with a dropdown menu containing 'Office for Human Resources and Administration'. Below this is the 'Setup Rules' section, which has a dropdown for 'Group 1' and a rule configuration area with 'Job Location ID' and 'Matches' dropdowns, and a value of '1'. A red box highlights the 'Add Rule' button (callout 12). Another red box highlights the 'Create Group' button (callout 13). At the bottom right, a red box highlights the 'Save' and 'Download Preview Users' buttons (callout 11). A red box highlights the 'Save' button (callout 10). A 'Cancel' button is also visible. A '13' callout is also present near the 'Create Group' button.



Task C. Associate Learning and Execute Changes

1. Select **Items**.
2. Select **Add Items icon**.
3. Check the box next to the item you want to associate to the Assignment Profile.
4. Select the **Add** button.

NOTE: Other than Items, you can also associate Libraries, Curricula, Programs, Recommendations, and User Groups to an Assignment Profile.

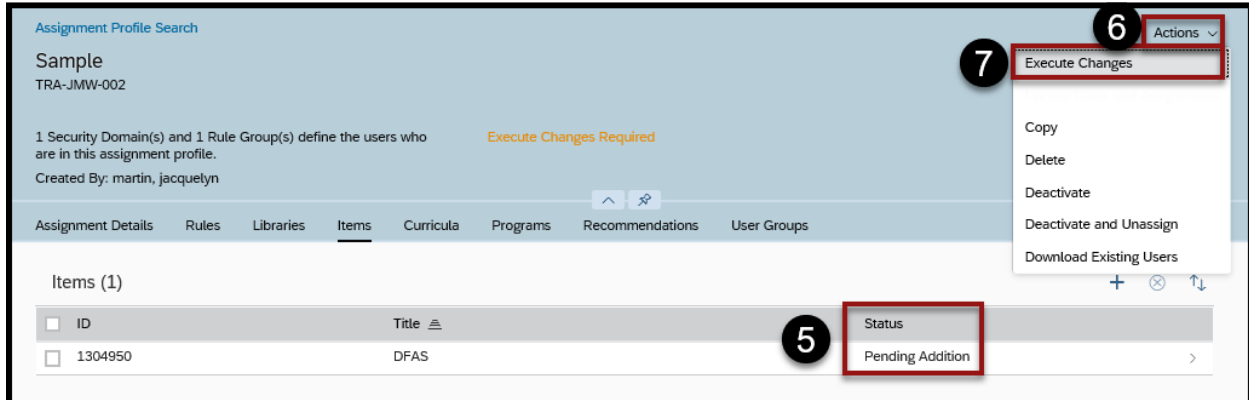


The screenshot shows the 'Assignment Profile Search' interface for 'Sample' (TRA-JMW-002). The 'Items' tab is selected, and the 'Add Items icon' (+) is highlighted. An 'Add Items to Assignment Profile' dialog box is open, displaying a list of items with checkboxes. The 'Add' button in the dialog is highlighted, and the checkbox for the first item is checked.

ID	Title	Status
There are no items associated with this Assignment Profile.		

Item	Title	Add
DOD 1304950 (Rev 1 - 4/27/2010 04:24 PM America/New York)	DFAS	<input checked="" type="checkbox"/>
DOD 1337224 (Rev 1 - 9/30/2010 06:14 PM America/New York)	Environmental Safety and Occupational Health - Lesson from FMT 352A, CLM035	<input type="checkbox"/>
DOD 1349046 (Rev 1 - 11/22/2010 08:49 AM America/New York)	Performance-Based Services Acquisition CLC013 Section 888	<input type="checkbox"/>
DOD 1349048 (Rev 1 - 11/22/2010 08:57 AM America/New York)	COR Mission Focus CLC106 Section 893 8CLP	<input type="checkbox"/>
DOD 1349049 (Rev 1 - 11/22/2010 09:06 AM America/New York)	COR Overview: HCAA CLC012 Section 888	<input type="checkbox"/>
DOD 1367376 (Rev 1 - 1/21/2011 02:58 PM America/New York)	Essentials of Interagency Acquisitions/Fair Opportunity CLC030 Section 888	<input type="checkbox"/>
DOD 1367377 (Rev 1 - 1/21/2011 02:59 PM America/New York)	Mission Performance Assessment CON112 Section 303	<input type="checkbox"/>
DOD 1375420 (Rev 1 - 3/29/2011 01:02 PM America/New York)	Victim Witness Assistance Program (VWAP)- (JAL FHCC)	<input type="checkbox"/>
DOD 1423312 (Rev 1 - 5/6/2011 03:25 PM America/New York)	Green Procurement CLC046 Section 889	<input type="checkbox"/>

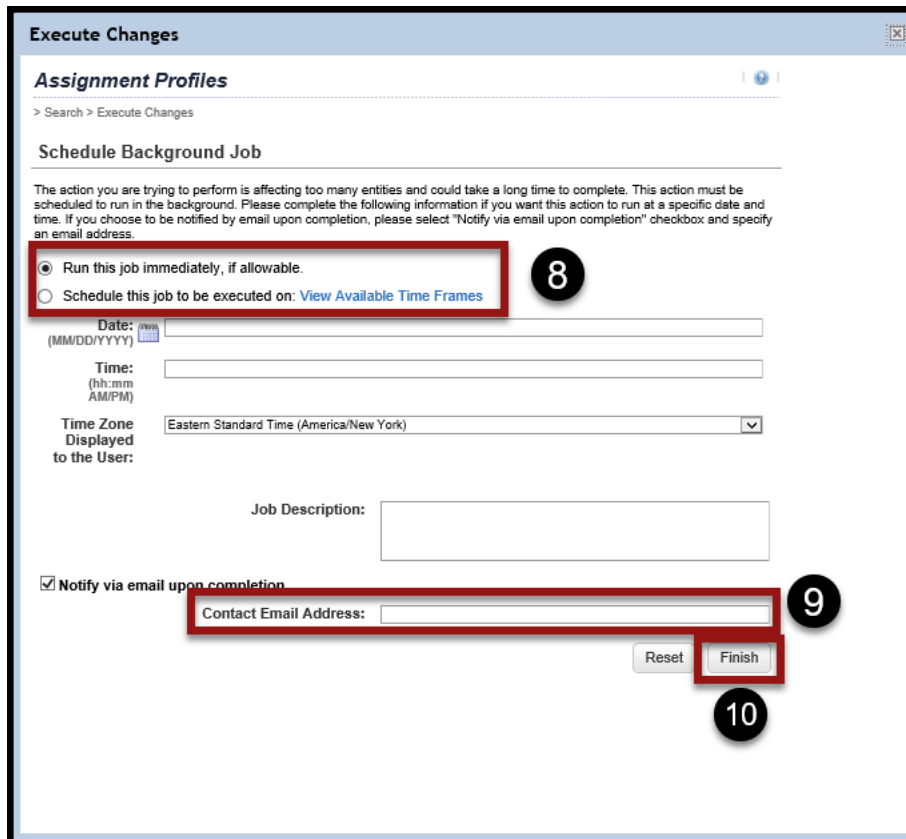
5. Once you have finished associating everything that needs to be included in the Assignment Profile record, you must execute changes. At this point, the status of the items added is **Pending Addition**. Once you execute the changes, the status will change to Valid.
6. Select **Actions**.
7. Select **Execute Changes**.



The screenshot shows the 'Assignment Profile Search' interface for a profile named 'Sample' (TRA-JMW-002). The 'Items' tab is active, displaying a table with one item. The status of this item is 'Pending Addition'. An 'Actions' dropdown menu is open, showing 'Execute Changes' as the selected option. A red box highlights the 'Execute Changes' option in the dropdown, and another red box highlights the 'Pending Addition' status in the table. A third red box highlights the 'Status' column header in the table.

ID	Title	Status
1304950	DFAS	Pending Addition

8. You can choose to execute the changes immediately or schedule it for a future time by selecting the radio button next to the option you prefer.
9. Enter your **Email Address**.
10. Select **Finish**.



The screenshot shows a web form titled "Execute Changes" with a sub-header "Assignment Profiles". Below this is a breadcrumb trail "> Search > Execute Changes" and a section titled "Schedule Background Job". A warning message states: "The action you are trying to perform is affecting too many entities and could take a long time to complete. This action must be scheduled to run in the background. Please complete the following information if you want this action to run at a specific date and time. If you choose to be notified by email upon completion, please select 'Notify via email upon completion' checkbox and specify an email address." There are two radio button options: "Run this job immediately, if allowable." (selected) and "Schedule this job to be executed on: View Available Time Frames". Below these are fields for "Date: (MM/DD/YYYY)", "Time: (hh:mm AM/PM)", and a "Time Zone" dropdown menu set to "Eastern Standard Time (America/New York)". A "Job Description:" text area is also present. A checked checkbox "Notify via email upon completion" is followed by a "Contact Email Address:" text field. At the bottom right are "Reset" and "Finish" buttons. Red boxes and numbered callouts (8, 9, 10) highlight the radio button options, the email address field, and the "Finish" button respectively.