



## Admin Job Aid: Create and Configure a Cohort

(Revision date: August, 31 2020)

### Purpose

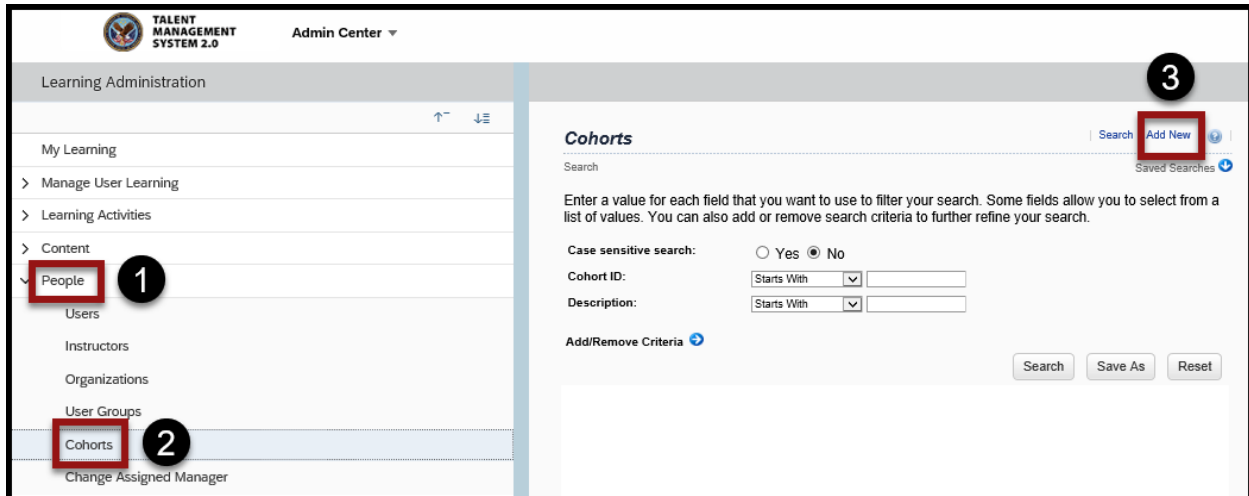
The purpose of this job aid is to guide you through the step-by-step process of creating and configuring a cohort.

In this job aid, you will learn how to:

- Task A. Create a Cohort
- Task B. Configure a Cohort

## Task A. Create a Cohort

1. Select **People**.
2. Select **Cohorts**.
3. Select the **Add New** link.

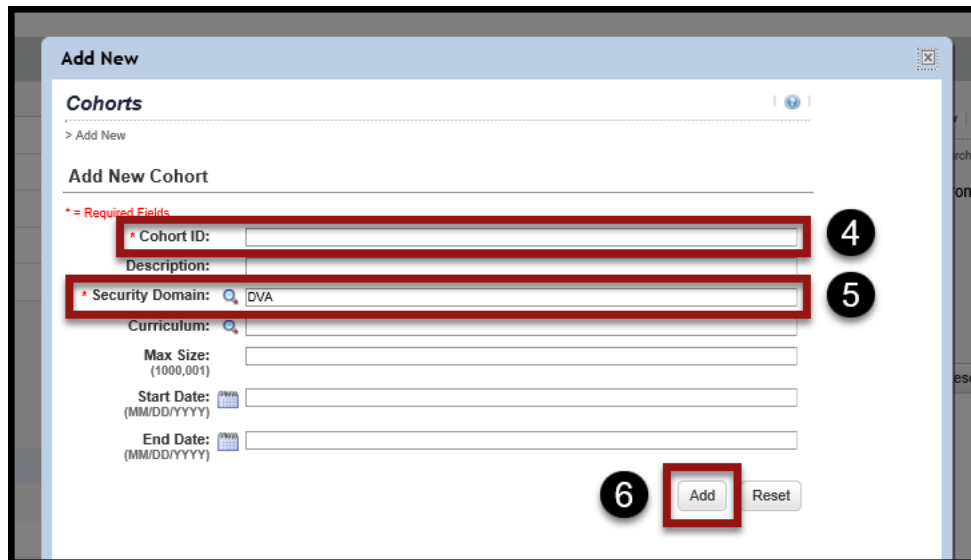


The screenshot displays the TMS Admin Center interface. The top navigation bar includes the TMS logo and 'Admin Center'. The left sidebar, under 'Learning Administration', lists various categories: 'My Learning', 'Manage User Learning', 'Learning Activities', 'Content', 'People' (1), 'Users', 'Instructors', 'Organizations', 'User Groups', and 'Cohorts' (2). The 'Cohorts' section is selected. The main content area, titled 'Cohorts', features a search bar with an 'Add New' link (3) highlighted. Below the search bar, there are fields for 'Case sensitive search' (radio buttons for Yes and No), 'Cohort ID' (Starts With dropdown and text input), and 'Description' (Starts With dropdown and text input). At the bottom of the search area are 'Search', 'Save As', and 'Reset' buttons.

4. Enter a **Cohort ID**.
5. Enter a **Security Domain**. Select the **Search** icon to search for and select a security domain if you're not sure what to enter in that field.

**NOTE:** You may complete the other fields on this page as necessary, but they are not required.

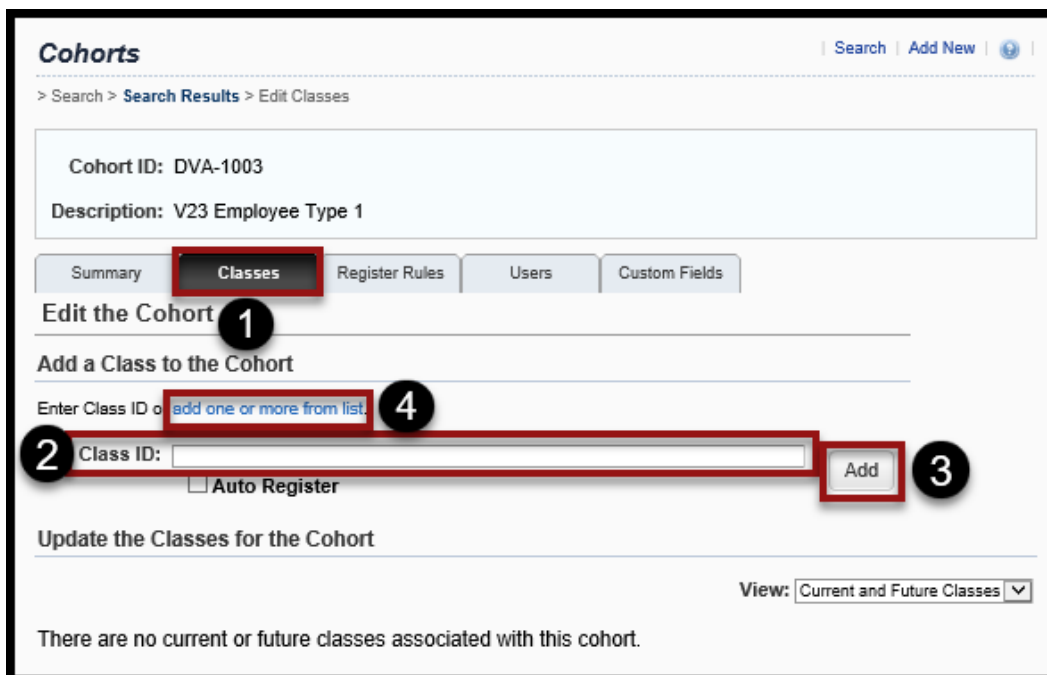
6. Select **Add**. You have successfully added a new cohort.



The screenshot shows the 'Add New Cohort' form in the TMS system. The form is titled 'Add New Cohort' and includes a list of fields: Cohort ID, Description, Security Domain, Curriculum, Max Size, Start Date, and End Date. The 'Cohort ID' field is highlighted with a red box and a circled number 4. The 'Security Domain' field is highlighted with a red box and a circled number 5. The 'Add' button is highlighted with a red box and a circled number 6. The 'Reset' button is also visible next to the 'Add' button. The form is set against a light blue background with a white border.

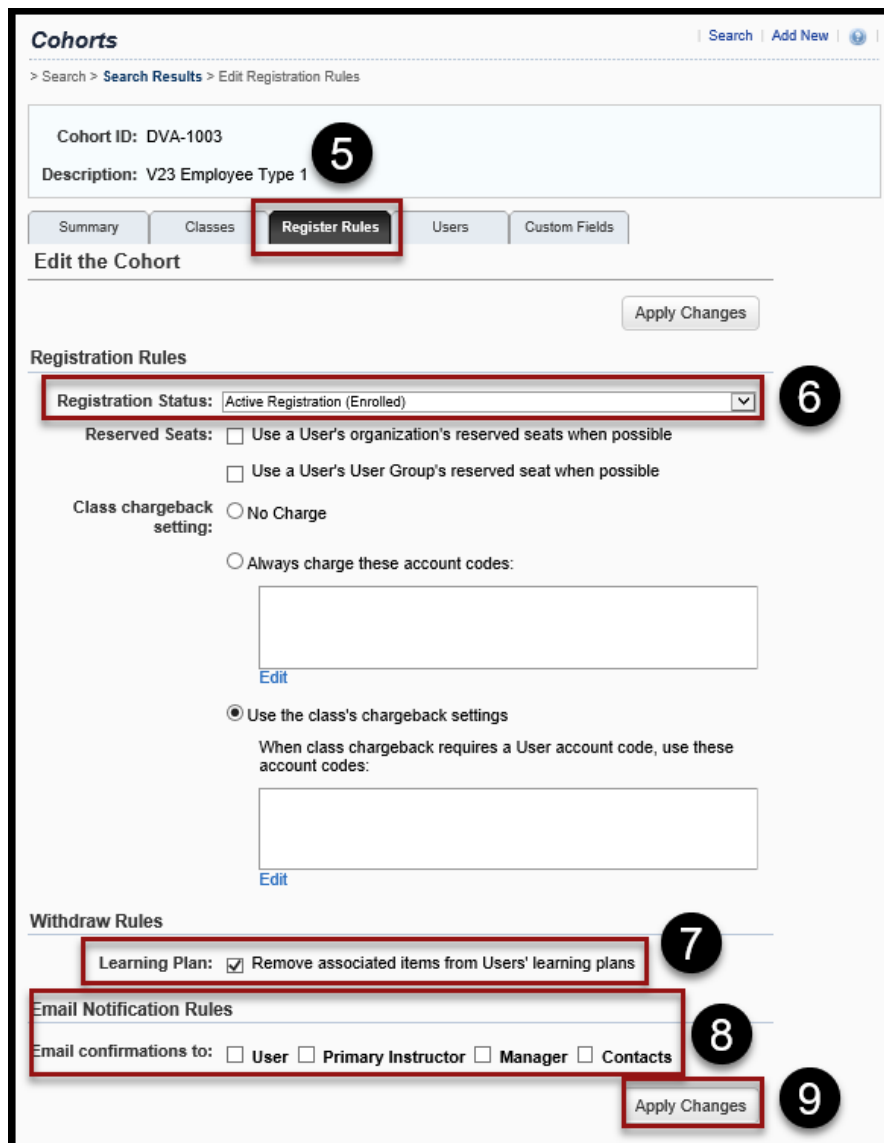
## Task B. Configure a Cohort

1. Select the **Classes** tab.
2. Enter the **Class ID** if you know what it is.
3. Select **Add**.
4. If you do not know the Class ID, select the **add one or more from list** link to search for and select Classes to associate with the cohort.



The screenshot shows the 'Cohorts' configuration page. At the top, there are links for 'Search' and 'Add New'. Below that, the current cohort details are shown: 'Cohort ID: DVA-1003' and 'Description: V23 Employee Type 1'. A navigation bar contains tabs for 'Summary', 'Classes', 'Register Rules', 'Users', and 'Custom Fields'. The 'Classes' tab is selected and highlighted with a red box and a circled '1'. Below the tabs, the section 'Add a Class to the Cohort' is visible. It includes a text input field for 'Enter Class ID or' with a blue link 'add one or more from list' next to it, highlighted with a red box and a circled '4'. Below this is a 'Class ID:' input field, highlighted with a red box and a circled '2'. To the right of the 'Class ID' field is an 'Add' button, highlighted with a red box and a circled '3'. There is also an 'Auto Register' checkbox. At the bottom right, there is a 'View:' dropdown menu set to 'Current and Future Classes'. A message at the bottom states: 'There are no current or future classes associated with this cohort.'

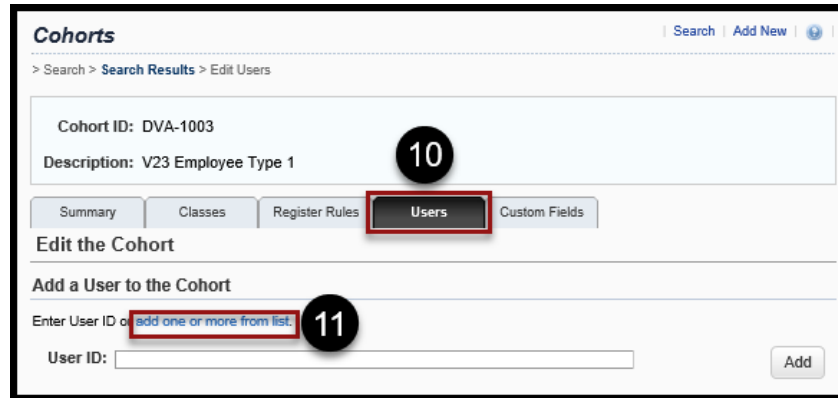
5. Select **Register Rules** tab.
6. Select the **Registration Status** from the drop-down list.
7. Enable the **Withdraw Rules** by selecting the **Learning Plan** checkbox.
8. Select the **Notification Rules** to indicate who will get an e-mail confirmation when someone enrolls or withdraws from the cohort.
9. Select **Apply Changes**.



The screenshot shows the 'Cohorts' page in the TMS system, specifically the 'Edit Registration Rules' section for Cohort ID: DVA-1003. The page has a breadcrumb trail: > Search > Search Results > Edit Registration Rules. The cohort description is 'V23 Employee Type 1'. There are four tabs: Summary, Classes, Register Rules (highlighted with a red box and callout 5), Users, and Custom Fields. Below the tabs is an 'Apply Changes' button. The 'Registration Rules' section includes a dropdown menu for 'Registration Status' set to 'Active Registration (Enrolled)' (callout 6). Below this are checkboxes for 'Reserved Seats' and 'Class chargeback setting'. The 'Withdraw Rules' section has a checkbox for 'Learning Plan' which is checked (callout 7). The 'Email Notification Rules' section has checkboxes for 'User', 'Primary Instructor', 'Manager', and 'Contacts' (callout 8). At the bottom right is another 'Apply Changes' button (callout 9).

10. Select the **Users** tab.

11. Select the **add one or more from list** link to search for and select users to add to the cohort.



**Cohorts** | Search | Add New

> Search > Search Results > Edit Users

Cohort ID: DVA-1003  
Description: V23 Employee Type 1

Summary | Classes | Register Rules | **Users** | Custom Fields

**Edit the Cohort**

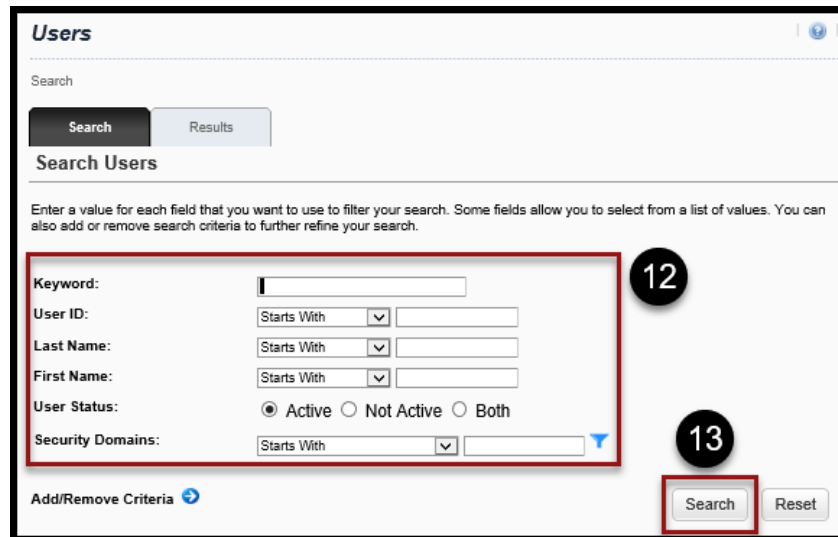
**Add a User to the Cohort**

Enter User ID or **add one or more from list**

User ID:

12. Enter **Search Criteria** to locate users to add to the cohort.

13. Select **Search**.



**Users** | Search

Search | Results

**Search Users**

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

**Keyword:**

**User ID:** Starts With

**Last Name:** Starts With

**First Name:** Starts With

**User Status:**  Active  Not Active  Both

**Security Domains:** Starts With

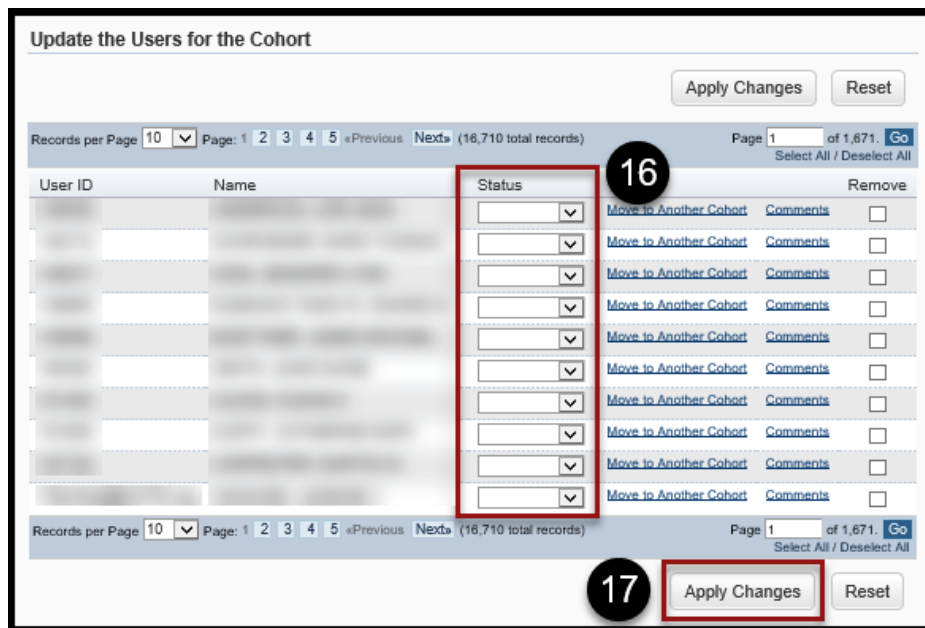
Add/Remove Criteria

14. Select the **Users** you want to add to the cohort.
15. Select **Add**.



The screenshot shows a web interface titled "Users". At the top right are "Add" and "Reset" buttons. Below is a table with columns "User ID", "Name", and "Select". The "Select" column has two checked checkboxes. A red box highlights the "Select" column and the "Add" button at the bottom right. Callout "14" points to the checkboxes, and callout "15" points to the "Add" button.

16. Once User(s) have been added to the cohort, you may manage their **Status** by selecting the appropriate status from the drop-down list.
17. Select **Apply Changes**. You have successfully configured a cohort.



The screenshot shows a web interface titled "Update the Users for the Cohort". At the top right are "Apply Changes" and "Reset" buttons. Below is a table with columns "User ID", "Name", "Status", "Move to Another Cohort", "Comments", and "Remove". The "Status" column has a red box around it. A red box also highlights the "Apply Changes" button at the bottom right. Callout "16" points to the "Status" column, and callout "17" points to the "Apply Changes" button.