
TMS 2.0
VA
Admin Job Aid
Create and Configure a Cohort

# Admin Job Aid: Create and Configure a Cohort

**(Revision date: August, 31 2020)**

## Purpose

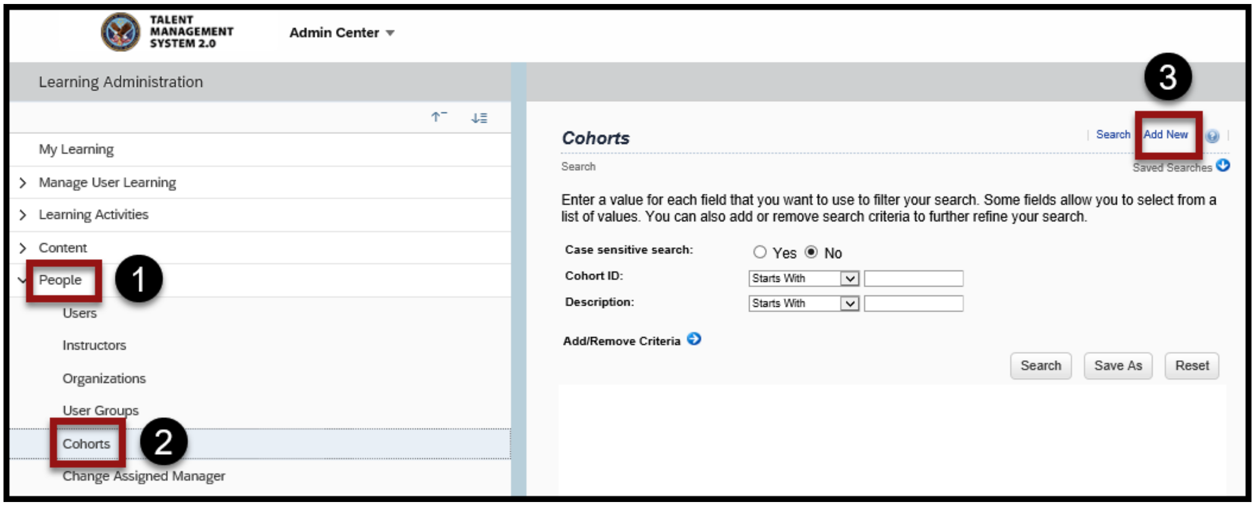
The purpose of this job aid is to guide you through the step-by-step process of creating and configuring a cohort.

In this job aid, you will learn how to:

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

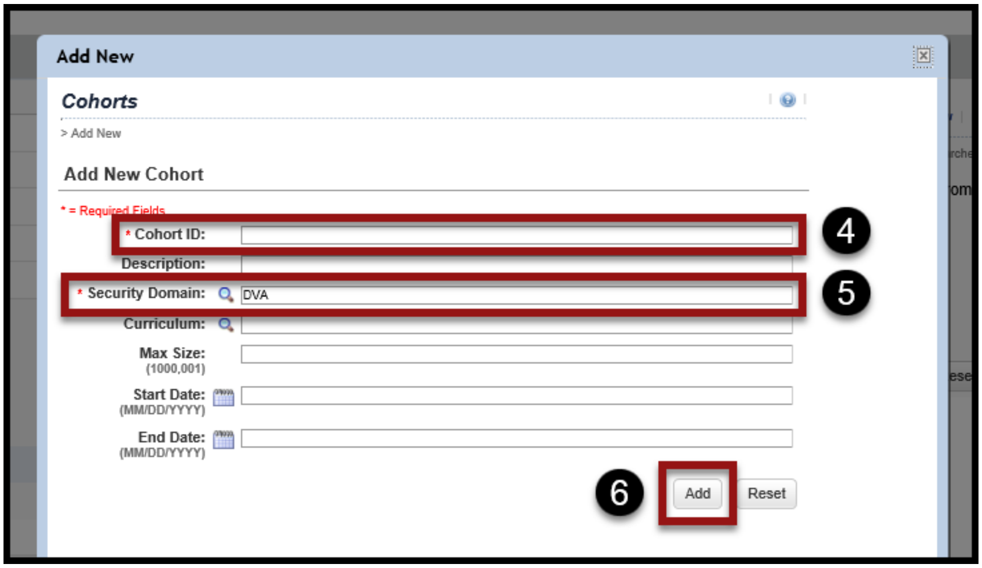
# Task A. Create a Cohort

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



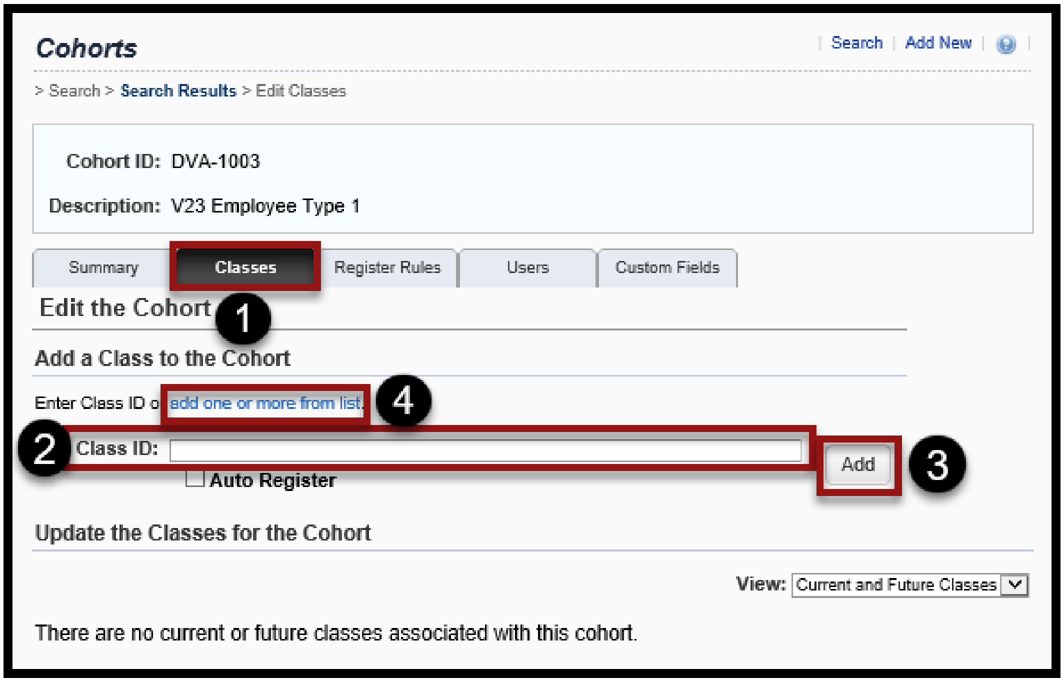
4. Enter a **Cohort ID**.
5. Enter a **Security Domain**. Select the **Search** icon to search for and select a security domain if you're not sure what to enter in that field.

   **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.

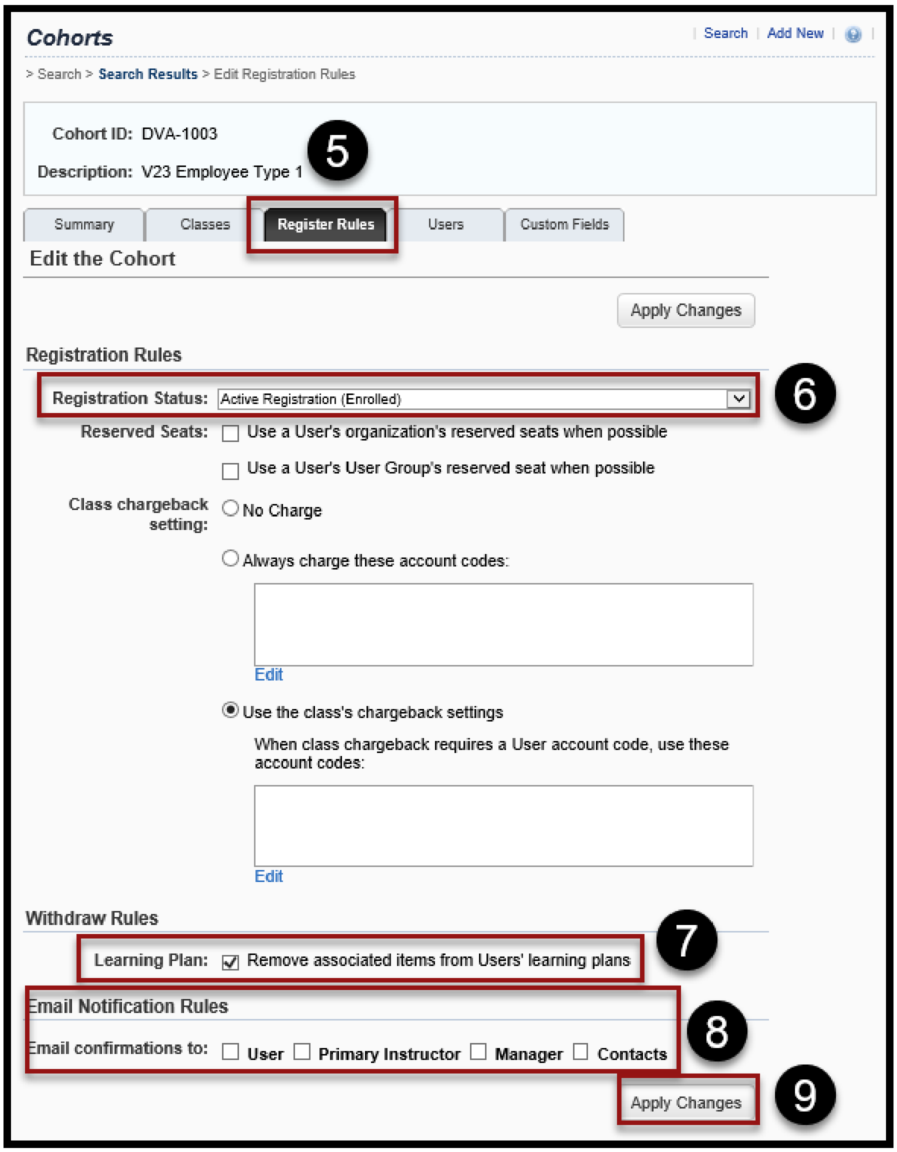


# Task B. Configure a Cohort

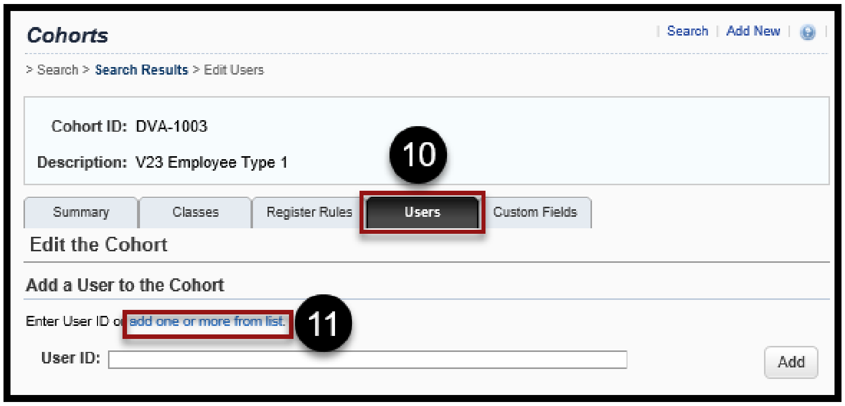
1. Select the **Classes** tab.
2. Enter the **Class ID** if you know what it is.
3. Select **Add**.
4. If you do not know the Class ID, select the **add one or more from list** link to search for and select Classes to associate with the cohort.



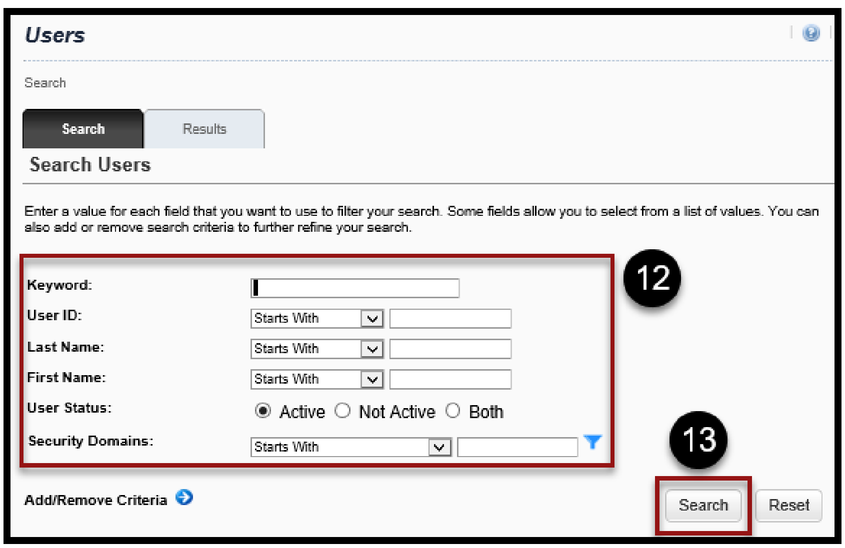
5. Select **Register Rules** tab.
6. Select the **Registration Status** from the drop-down list.
7. Enable the **Withdraw Rules** by selecting the **Learning Plan** checkbox.
8. Select the **Notification Rules** to indicate who will get an e-mail confirmation when someone enrolls or withdraws from the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



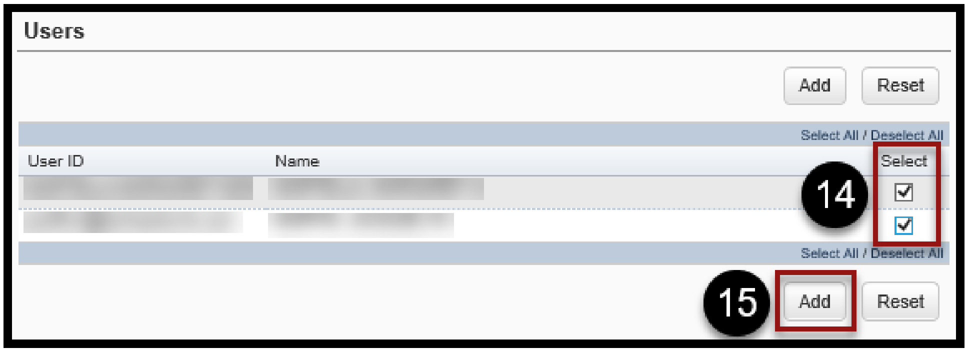
10. Select the **Users** tab.
11. Select the **add one or more from list** link to search for and select users to add to the cohort.




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



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




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.