



Introduction to VA TMS for All Administrators and Reports Managers

VA TMS Administrators

Role-Based Training

Virtual Instructor-Led Training

Participant Guide

November 2020

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1.0 Session Overview

1.1 Introduction

Thank you for attending the Veterans Affairs (VA) Talent Management System (TMS) Administrator Role-Based Training: Introduction to VA TMS for all Administrators and Reports Managers. Through discussions, demonstrations, and hands-on computer lab work, this training teaches basic concepts and terminology associated with the VA TMS.

Participants will be introduced to the TMS search and navigation features, the Learning Needs Management Model, as well as how to work with user records using the hands-on lab activities.

Additionally, participants will learn how to use the VA TMS reporting features to create, run, and save recurring reports.

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

1.2 Course Goal

This session provides instruction and interactive practice related to the navigation, searching, learning needs management, working with user records, and reports functions in the VA TMS specific to all Administrator and Reports Managers.

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

- Access and navigate the VA TMS
- Execute searches of the VA TMS database
- Explain the layout of basic learning records
- Describe the Learning Needs Management Model and how it applies to the admin and participant
- Run, save, and create recurring reports

1.3 Target Audience

The participants of this course are Help Desk Managers (as stand-alone training), Reports Managers (as stand-alone training), and all types of TMS administrator.




1.4 Participant Guide

This Participant Guide is attached to the web-conferencing session 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.

1.5 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.

1.6 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.

1.7 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.

1.8 Course Length

The table below includes a list of all training lessons in the session, along with estimated times.

Table 2: Session Lessons and Durations

Lesson Title	Estimated Time
Welcome and Introduction	10 minutes
Lesson 1: General Navigation	85 minutes
Lesson 2: Learning Needs Management Overview	20 minutes
Lesson 3: Working with User Records	35 minutes
Lesson 4: Reports	70 minutes

Total: 3 hours, 40 minutes

2.0 Introduction to VA TMS for All Administrators and Reports Managers

2.1 Welcome and Introduction

System Login

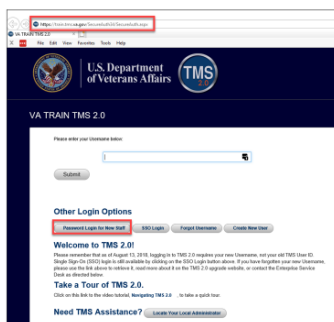
- In your browser, navigate to:
<https://train.tms.va.gov/SecureAuth34/>
- Select the **Password Login for New Staff** button.
- Enter your TRAIN Admin ID and Password.

Audio (opens 10 minutes before class):

- Dial into the AUDIO-VANTS LINE:
1-800-767-1750
- ACCESS CODE: 48596#

Download and print the Participant Guide from the class email or from the class chatroom.

***Please Use Internet Explorer**



Slide 1: System Login

System Login

Ten minutes before class begins, follow the instructions on the slide to login to the TRAIN environment and dial into the Audio-VANTS line. Ask any questions you may have for me using the chat feature.

- Train Environment Link:**
<https://train.tms.va.gov/SecureAuth34/>
- 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 Administrator Role-Based Training:
Introduction to VA TMS for All Administrators and Reports
Managers

Welcome

Welcome to the Introduction to VA TMS for All Administrators and Reports Managers.

If you have any questions throughout the training session, you can send a message through the Chat function, and I can answer it or show a demonstration where appropriate. Otherwise, we will have a question session at the end of each lesson.

PARTICIPANT INTRODUCTIONS

- Your name (including any nicknames)
- Where you work



Slide 3: Participant Introductions

PARTICIPANT GUIDE

- Copies of all PowerPoint slides
- Space for taking notes
- Directions for completing individual and group activities



Slide 4: Participant Guide

Introductions

Please introduce yourself in the chat room by sharing your name (including any nicknames) and where you work.

Participant Guide

Each of you should have a Participant Guide that has been developed to support learning during and after the session. This guide contains copies of all PowerPoint slides, space for taking notes, and directions for completing activities. If you do not have a copy of the Participant Guide available, please speak up now so that we can make sure everyone is on the same page.

LOGISTICS

- Scheduled breaks
- Use the chat feature to ask questions
- Ensure your audio is on mute



Slide 5: Logistics

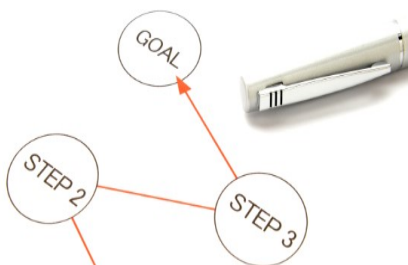
Logistics

Quickly review the following training logistics:

- Note that a 10-minute break will be provided every hour.
- Use the chat feature to ask questions.
- Ensure your audio is on mute and do not put the call on hold at any time during the training.

COURSE GOALS

Provide instruction and interactive practice related to navigation, learning needs management, working with user records, and reports functions in the VA TMS specific to all Administrators and Reports Managers.



Slide 6: Course Goals

Course Goals

The goal of this training is to provide instruction and interactive practice related to the navigation, learning needs management, working with user records, and reports functions in the VA TMS specific to all Administrator and Reports Managers.

TRAINING METHODS

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

Slide 7: 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 participants' engagement and the content presentations. These 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 an administrator or reports manager.
- **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 multiple choice/true-false knowledge checks.

SESSION AGENDA

- **Lesson 1:** General Navigation
- **Lesson 2:** Learning Needs Management Overview
- **Lesson 3:** User Records
- **Lesson 4:** Reports



Slide 8: Session Agenda

Session Agenda

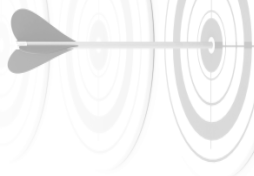
This training session is 3.5 hours long and is organized as follows:

- Lesson 1: General Navigation
- Lesson 2: Learning Needs Management Overview
- Lesson 3: Working with User Records
- Lesson 4: Reports

SESSION OBJECTIVES

After completing this session, you will be able to:

- Access and navigate the VA TMS
- Explain the layout of basic learning records
- Describe the Learning Needs Management Model and how it applies to administrators and users
- Execute searches of the VA TMS database
- Run, save, and create recurring reports



Slide 9: Session Objectives

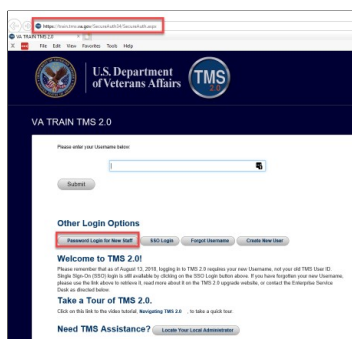
Session Objectives

After completing this session, you will be able to:

- Access and navigate the VA TMS
- Explain the layout of basic learning records
- Describe the Learning Needs Management Model and how it applies to administrators and users
- Execute searches of the VA TMS database
- Run, save, and create recurring reports

System Login

- In your browser, navigate to:
<https://train.tms.va.gov/SecureAuth34/SecureAuth.aspx>
- Select **Password Login for New Staff**
- Input the provided username and password



Slide 10: System Login

System Login

At this point, it is time to log in to the VA TRAIN environment, so you can begin completing activities.

To log in to the TRAIN environment:

1. Enter the **URL** shown on this slide into your browser and press the **Enter** key or select **Go**. (The VA TRAIN TMS login screen displays.)
2. Select Password Login for New Staff.

Enter your VA-provided username and password into the box and select **Submit**.

QUESTIONS?



Slide 11: Questions?

Questions?

If you have any questions about the material that will be covered today, please ask them using the chat feature at this time.

2.2 Lesson 1: General Navigation



Slide 12: Lesson 1: General Navigation

Lesson 1: General Navigation

The goal of this lesson is to provide you with general guidelines for accessing, navigating, and searching within the VA TMS.

LESSON OBJECTIVES

After completing this lesson you will be able to:

- Describe how administrators and users use VA TMS
- Navigate within TMS as an administrator
- Work with the Recents area
- Create search filters and search for records
- View and save search results

Slide 13: Lesson 1 Objectives

Lesson 1 Objectives

After completing this lesson, you will be able to:

- Identify admins and users in the VA TMS
- Navigate within the VA TMS as an admin
- Work with the Recents area
- Create search filters and search for records
- View and save search results

Notes: _____

Introduction to the System

What is the VA Talent Management System (VA TMS)?

It is a system that:

- Manages learning processes
- Manages third-party learning content
- Deploys course content and exams
- Handles auditing and reporting

Slide 14: Introduction to the System

Introduction to the System

The VA TMS is designed to facilitate tracking of the comprehensive information organizations need to manage learning programs and processes effectively.

The VA TMS enables its administrators to make informed decisions about their user population, learning assignments, learning completions, scheduling, and resources.

VA TMS



Slide 15: VA TMS

VA TMS

This graphic illustrates the different purposes and uses of the VA TMS, including:

- User Management & Assignments
- Competency Management (**Note:** Not all organizations have implemented this function.)
- Training Record Keeping
- Scheduling & Enrollment
- Resource Management
- Online Content Management
- Testing & Evaluation

Notes: _____

VA TMS User

Users (employees, managers, organization owners, and contractors) can do the following in the VA TMS:

- View training information
- Register for training sessions
- Launch online training courses
- Manage their My Learning Lists
- View direct report's training information (for managers only)

Slide 16: VA TMS User

VA TMS User

A **VA TMS User** is any person in an organization for whom past, present, and future learning records must be tracked. A user may be an employee, manager, volunteer, or contractor.

Once users log in to the VA TMS, they can:

- View their training information
- Register for training sessions
- Launch online training courses
- Manage their My Learning lists
- View direct report's training information (for managers only)

Notes: _____

VA TMS Administrator

An Administrator for the VA TMS can have many different responsibilities depending on role, including:

- Creating items, programs, and curricula
- Editing temporary user records
- Scheduling and enrolling users into training events
- Updating users' training completion statuses
- Running reports

Slide 17: VA TMS Admin

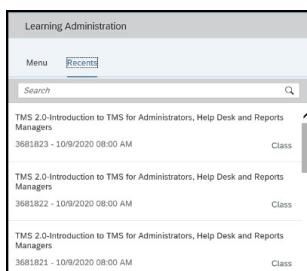
VA TMS Admin

A **VA TMS Admin** is an administrator for the VA TMS. An admin can have many different types of responsibilities, including adding or editing user records, scheduling training, enrolling users into training events, giving users credit for completing training, or running reports. An admin can also create items, curricula, and programs.

Recents

Use **Recents** to

- go to recently accessed records instead of performing a search



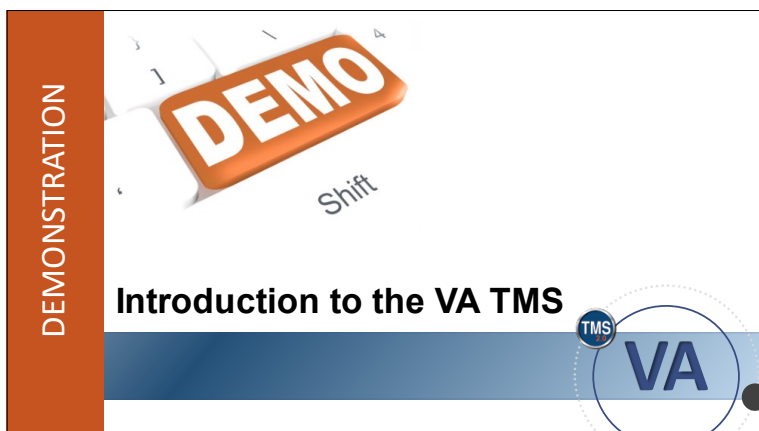
Slide 18: Recents

Recents

The **Recents** panel shows the records that you have accessed most recently. Finding records that were recently accessed allows administrators to return to previously viewed records much faster. Recently accessed records are available from anywhere and the feature tracks enough data so the user's activity in recent sessions is just a click or two away.

Demonstration: Introduction to the VA TMS

Now the instructor will introduce you to basic navigation in the VA TMS.



Slide 19: Demonstration: Introduction to the VA TMS

Notes: _____



Demonstration: Introduction to the VA TMS

How to Access the Train Environment:

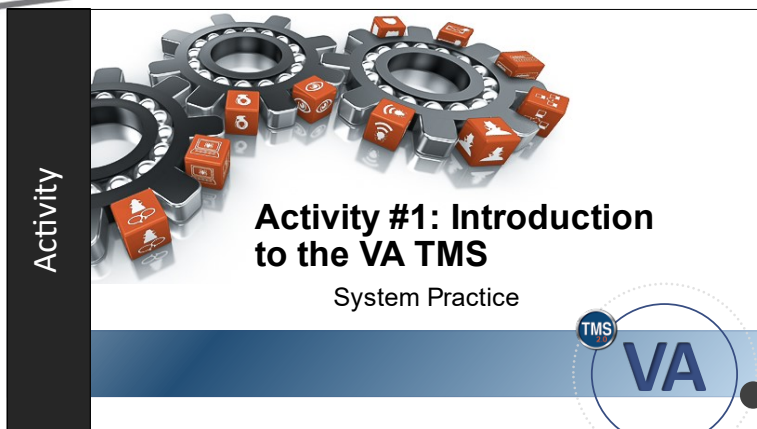
1. Enter the **TMS Train URL** into your browser and press the **Enter** key. The VA TMS login screen displays.
2. Select the **Password Login for New Staff** button.
3. Enter your **Admin ID** and **Password**.
4. Press the Enter key or select **Log in**. The VA TMS landing page displays.
5. Select **Learning Administration**.

Admin Home Page Layout

There are three main sections of the admin home page:

- **Main Menu:** The menu panel on the left-hand side contains several functional areas such as Manage User Learning, Learning Activities, and Content, which can be expanded. Your options under each functional area may differ depending on the workflows and roles you are associated with. The **Expand All** icon above Admin Home will expand each functional area. The **Collapse All** icon will collapse all of the functional areas in the main menu.
- **Recents:** Located next to the Menu, selecting Recents will show a chronological list of all recently accessed records. You can use the search bar to filter the list and search for a specific record.
- **Welcome Area:** Includes relevant VA TMS updates and announcements. Above the Welcome Area, there is an **Enter Full Screen** icon. This icon will be visible no matter where you are in Learning Administration. When full screen mode has been activated, you can select the same icon to Exit Full Screen.

Notes: _____



Slide 20: Activity #1: Introduction to the VA TMS

Activity #1: Introduction to the VA TMS

- Now you will have an opportunity to practice navigating the VA TMS on your own.
- Complete the steps for Activity #1 on the next page.
- If you have any questions during the activity, send them to me using the Chat feature.

Notes: _____



Activity #1: Introduction to the VA TMS

1. Log in to the VA TRAIN environment with the username and password you were assigned then select Learning Administration from the TMS home page.
2. Select the **Expand All** icon in the menu panel.
3. Select the **Collapse All** icon in the menu panel.
4. Expand the **People** functional area on the main menu.
5. Select **Users**.
6. Select the **Enter Full Screen** icon which is located in the upper right-hand corner of your screen.
7. Select the **Exit Full Screen** icon.
8. Select **Recents**.
9. Select one of the records listed in the Recents area.
10. Select **Menu**.
11. Select **Admin Home**.

Notes: _____

Cross Entity Linking

Cross entity linking allows users to see associations related to a record that they are working in.



Slide 21: Cross Entity Linking

Cross Entity Linking

When accessing any record, users frequently see related associations that they would like to investigate more fully. Cross entity linking makes each association a hyperlink and takes the user to the record in question. This means less searching and more efficient use of time.

For example, from the Related area within a curriculum's Online Content tab, an admin may select the arrow icon and go directly to that item's record. The Recents panel works well with this feature because you can quickly and easily return to the original record by accessing it on the Recents panel.

Searching

Use the search feature to:

- Create and delete a search filter
- Add and remove criteria from your search filter
- Save your search to use later
- Export search results to Microsoft Excel

Slide 22: Searching

Searching

In this section, we discuss the Search feature in the VA TMS. Searching is critical to most workflows in the system, including viewing records and using wizards. Each menu option selected on the left page opens a search page. Use the Search feature to:

- Create and delete a search filter
- Add and remove criteria from your search filter
- Save your search to use later
- Export search results to Microsoft Excel

Notes: _____

Search Filters

- The VA TMS allows you to use search filters to determine the attributes of an entity you would like to search for.
- Understanding how to use search filters makes your searches more accurate and efficient.
- You can save a search filter and reuse the criteria specified. The saved filter will only be available to you.

Slide 23: Search Filters

Search Filters

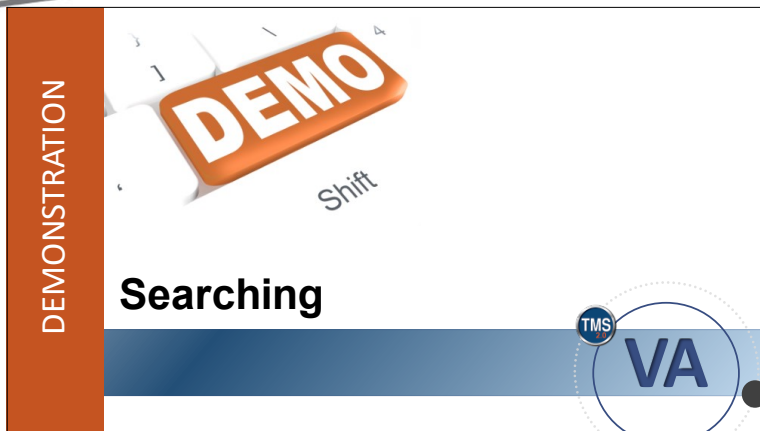
Each entity in the VA TMS has multiple attributes, and you may find that some of the attributes are more useful than others when conducting searches. The search screens in the VA TMS give you many search criteria filters to determine the attributes of the entity that you would like to search for.

The search filter determines the contents of your results by listing only those entities that satisfy all the criteria specified by your filter. For example, you may want to list only users who are part of a specific organization. You must specify the organization in a filter and apply that filter to the search criteria to see only those users that relate to the selected organization.

Understanding how to use search filters makes your searches more accurate and efficient.

You can save a search filter and reuse the criteria specified in the search filter. The search filter is individual based and available only to you.

Notes: _____



Slide 24: Demonstration: Searching

Demonstration: Searching

Now, I will demonstrate the different search functions, so you can see how to complete these tasks.

Notes: _____



Demonstration: Searching

Search Options:

1. Select **People > Users**.
2. Select the **Exact** search option for the Last Name field. Search for “martin.”
 - Exact = searches for an exact match of characters
3. Select the **Any** search option for the Last Name field. Search for “martin, smith.”
 - Any = one or more exact searches separated by a comma
4. Select the **Starts With** search option in the Last Name field. Search for “mar.”
 - Starts With = a result starts with one or more specified characters
5. Select the **Contains** search option in the Last Name field. Search for “mar.”
 - Contains = contains specified characters
6. Select the **Does Not Contain** search option.
 - Does Not Contain = does not contain specified characters
7. Select the **Is Empty** search option in the Middle Initial field. Note that the field becomes greyed out.
 - Is Empty = specified field is empty

To add or remove a search filter:

1. Navigate to **Learning Activities > Items**.
2. Select **Add/Remove Criteria**.
3. Select the **Categories** checkbox.
4. Choose **Select**.
5. To create a filter, select the Categories Filter by Criteria funnel icon.
6. Check the box for HR and Staff Development.
7. Select **Add to Filter**.
8. Select **Submit Filter**. **NOTE:** You are returned to your original search screen. You see that the Categories search attribute has criteria selected for this filter. You can modify this filter by selecting the Filter by Criteria icon, or you can clear the filter by selecting the Clear Filter icon.

Notes: _____

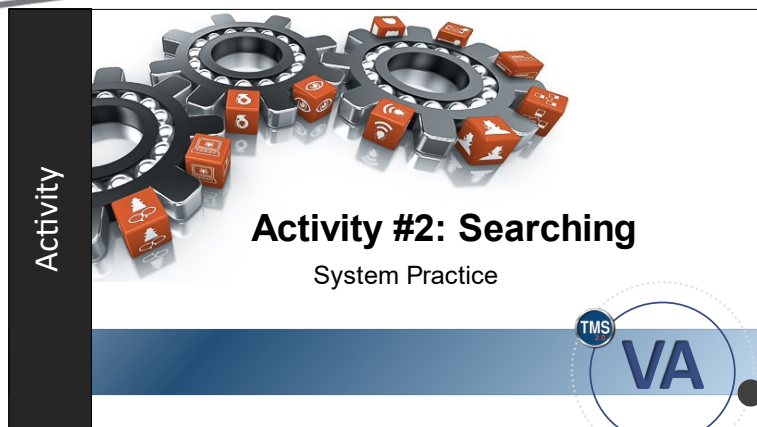
To save a search:

1. From the Items search page, select **Save As**.
2. The system prompts you for an ID for your saved search and a brief description of the search. **Enter an ID** with an intuitive description to make referencing it in the future easier like “HR Filter.”
3. Select **Submit**.

To access your saved searches:

1. Select **Saved Searches** at the upper right corner of the content frame.
2. Select the search you wish to conduct.
3. The selected search screen displays. The saved search ID and description are displayed at the top.
4. Select the **trash can icon** to remove the saved search.
5. Select **OK**.

Notes: _____



Slide 25: Activity #2: Searching

Activity #2: Searching

- Now you will have an opportunity to practice searching in the VA TMS.
- Complete the steps for Activity #2 on the next page.
- If you have any questions during the activity, send them to me using the Chat feature.

Notes: _____




Activity #2: Searching

1. Navigate to **Learning Activities > Items**.
2. Select the Security Domains **filter icon**.
3. Enter “train” in the Security Domain ID field.
4. Select **Search**.
5. Check the Top Level Only checkbox for the **LMS Training Domain**.
6. Select **Add to Filter**.
7. Select **Submit Filter**.
8. Select **Search**.
9. Select the white, funnel icon to clear the Security Domain filter.
10. Select the **Contains** search option for Item Title and type “**intro**” in the text field.
11. Select **Search**.
12. Select **Add/Remove Criteria**.
13. Check the box to add one or more criteria.
14. Choose **Select**. The new criteria display on your Items search page.

Notes: _____

Which search option would you use to perform a search for users with the last name Jones and the last name Smith?

a) Exact
b) Any
c) Contains
d) Starts With



KNOWLEDGE CHECK

Slide 26: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

Which search option would you use to search for users with the last name Jones and the last name Smith?

- a) Exact
- b) Any
- c) Contains
- d) Starts With

QUESTIONS?



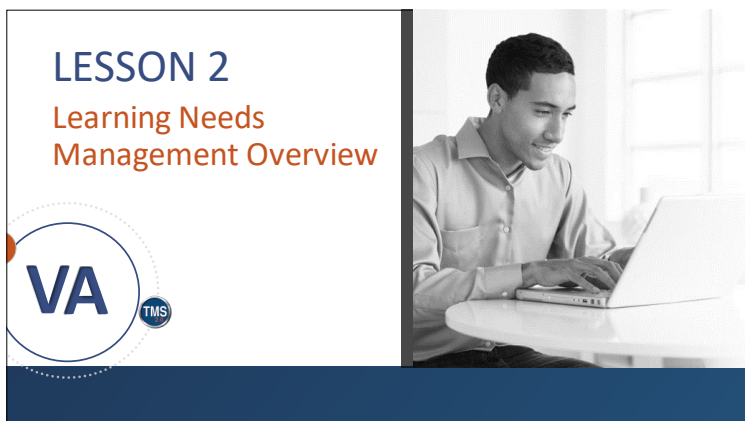
Slide 27: Questions?

Questions?

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

Notes: _____

2.3 Lesson 2: Learning Needs Management Overview



Slide 28: Lesson 2: Learning Needs Management Overview

Lesson 2: Learning Needs Management Overview

The goal of this lesson is to introduce you to the Learning Needs Management Model and how it is implemented in the VA TMS. You will also learn the terms and their definitions that are used in the model.

LESSON OBJECTIVES

After completing this lesson you will be able to:

- Identify and define the key terms associated with the Learning Needs Management Model
- Describe the process of implementing the Learning Needs Management Model

Slide 29: Lesson 2 Objectives

Lesson 2 Objectives

After completing this lesson you will be able to:

- Identify and define the terms associated with the Learning Needs Management Model
- Describe the process of implementing the Learning Needs Management Model

Notes: _____

Learning Needs Management Model

Follow these steps to successfully implement the Learning Needs Management Model:

1. Identify learning needs (outside VA TMS Learning)
2. Add items in VA TMS Learning
3. Add curricula in VA TMS Learning
4. Assign learning to users
5. Track and record learning events

Slide 30: Learning Needs Management Model

Learning Needs Management Model

By implementing the Learning Needs Management Model, your organization can easily track and report on the current training status of its user population.

Follow these steps below to successfully implement the Learning Needs Management Model:

1. Identify learning needs (outside VA TMS)
2. Add items in VA TMS Learning
3. Add curricula in VA TMS Learning
4. Assign learning events to users
5. Track and record learning events

Notes: _____

Key Terms

User: Any person for whom a database record has been created, including employees, contractors, and others for whom you wish to maintain learning records and to register for courses.

Item: A learning or non-learning unit whose assignment and completion can be tracked.

Curriculum: A group of one or more Items that can be assigned to users and have its completion status tracked as a group.

Slide 31: Key Terms

Key Terms

Let's spend a few minutes defining some key terms related to the Learning Needs Management Model.

- **User:** Any person for whom a database record has been created, including employees, contractors, and others for whom you wish to maintain learning records and to register for courses.
- **Item:** A learning or non-learning unit whose assignment and completion can be tracked.
- **Curriculum:** A group of one or more items that can be assigned to users and have its completion status tracked as a group.

Notes: _____

Key Terms (Cont'd)

Assigned Items: A list of items assigned to a user that must be completed. It also contains the date by which each item should be completed

History Record: A user's participation in the completion of an item or external event. It also contains the date by which each item should be completed

Learning History: A record of all completed learning events for the user

Class: An instance of an item added to a calendar where resources (instructors, equipment, locations) can be added to it. Users can also enroll in the class.

Slide 32: Key Terms (Con't)

Key Terms (Con't)

- **Assigned Items:** A list of items assigned to a user that must be completed. It also contains the date by which each item should be completed.
- **History Record:** A user's participation in the completion of an item or external event. It also contains the date by which each item should be completed.
- **Learning History:** A record of all recorded learning events for the user. Each learning event must have been recorded with a completion status such as Incomplete, Complete, or No-Show.
- **Class:** An instance of an item added to a calendar where resources can be added to it. Users can also enroll in the class.

Notes: _____

A Learning History is:

- a) A record of all recorded learning events for the user, including completion status
- b) A list of items assigned to a user that must be completed
- c) A learning or non-learning unit whose assignment and completion can be tracked
- d) None of the above



KNOWLEDGE CHECK

Slide 33: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

A Learning History is:

- a) a record of all recorded learning events for the user, including completion status
- b) a list of items assigned to a user that must be completed
- c) a learning or non-learning unit whose assignment and completion can be tracked
- d) none of the above

What do you call a group of one or more items that can be assigned to users and have its completion status tracked as a group?

- a) Program
- b) Item
- c) Curriculum
- d) Class



KNOWLEDGE CHECK

Slide 34: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

What do you call a group of one or more items that can be assigned to users and have its completion status tracked as a group?

- a) Program
- b) Item
- c) Curriculum
- d) Class

Notes: _____



Slide 35: Questions?

Questions?

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

Notes: _____

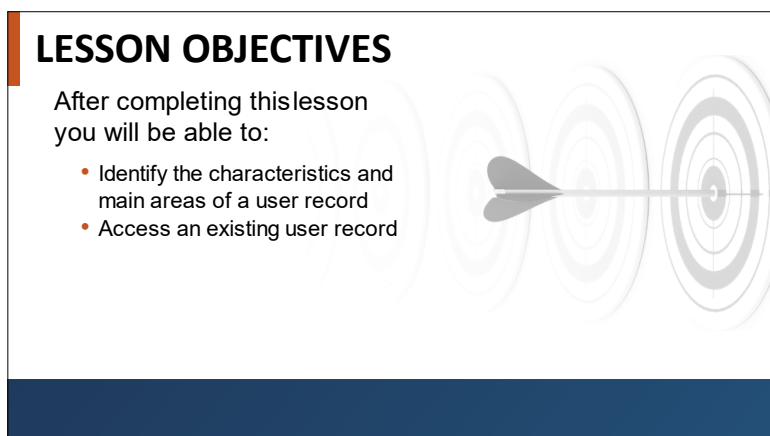
2.4 Lesson 3: Working with User Records



Slide 36: Lesson 3: Working with User Records

Lesson 3: Working with User Records

The VA TMS is centered on the user and gives an admin the ability to identify the training that users have successfully accomplished, need to accomplish, or are in the process of completing. The goal of this lesson is to familiarize you with the user record.



Slide 37: Lesson 3 Objectives

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Identify the characteristics and main areas of a user record
- Access an existing user record

Notes: _____

User Records

User Search

A0010 DMLMUSER
DMLMUSER.A0010

DETECTIVE
Richard L. Roudsbush VA Medical Center - Indianapolis IN (583)

Manager: A0010 DMLMSUPERVISOR Status: Active

Core Area

Actions Area

Content Status Learning History Surveys Approvals SF-182 Class Requests Assignment Profiles Library Access

Personal Information

*First Name: A0010 Middle Name: *Last Name: DMLMUSER

Region: Email Address:

Employment Information

Job Title: Employee Status: Job Location: Richard L. Roudsbush VA Medical C...

Related Area

Slide 38: User Records

User Records

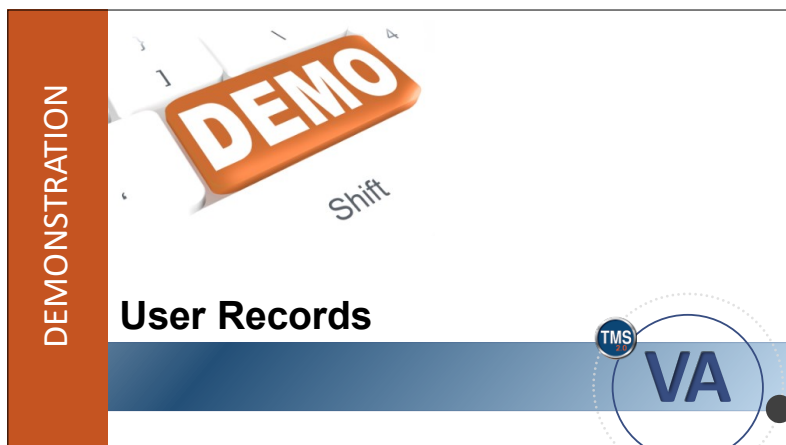
A user record provides current and comprehensive information about users, including their contact information, employment data, educational status, training assignments, assignment profiles, and much more.

As shown in the screen capture, the user record is divided into three main areas:

- Core (red outline)
- Related (purple outline)
- Actions (green outline)

Demonstration: User Records

Now I will complete a demonstration on user records.



Slide 39: Demonstration: User Records

Notes: _____



Demonstration: User Records

To locate and view a user record:

1. Navigate to **People > Users**.
2. Enter your search criteria (User ID: dmlmuser)
3. Select **Search**.
4. Select the User ID to open the user record.

Once the user record is displayed, review the three main areas of the record – Core, Related, and Actions.

Core Area

The **Core** area contains the basic information of the user record, including the user's name, job location, job code, manager, and status.

Related Area

1. The **Related** area of the user record contains additional information regarding the user. The related area displays a list of items that administrators use most frequently when interacting with the user record. Select one of the tabs across the top of the Related Area to display the details below. Be sure to demo the **search bar** and **sort icon**, which is included in several different tabs like Assigned Items and Learning History.
 - The **User Details** tab contains personal information, employment information, access settings, and security details that can be edited and saved.
 - The **Assigned Items** tab is used to assign items to a user and manage those items.
 - The **Curricula** tab is used to assign curricula as well as manage all of the curricula that are assigned to the user, regardless of how the curricula were assigned.
 - The **Programs** tab – Programs combine learning events to create a schedule of learning. The schedule of learning is controlled by the program's agenda, which functions like an academic syllabus.
 - The **Registration** tab is used to view the user's class registrations.
 - The **Content Status** tab is used to review any of the items that 1) are assigned to the user's Assigned Items and 2) have online content.
 - The **Learning History** tab is a transcript of all the items a user has ever completed.
 - The **Surveys** tab is used to view information about surveys associated with the user and details for the items that are associated with each survey. When a user completes

Notes: _____

an item that is associated with a survey, the survey is added to this tab. When a user completes the survey, the survey is removed from this tab.

2. Select the **More** icon to see additional Related Area tabs. The **More** icon displays a list of tabs that administrators need but use less frequently.
 - Some items require that users receive approval before they gain access to the item. In these situations, users must request approvals, which administrators can review from the **Approvals** tab
 - The **SF-182** tab lists any external learning requests associated with the user.
 - The **Class Requests** tab is used to view the requests that a user made from the user interface for instructor-led items or instructor-led items with online content.
 - The **Assignment Profiles** tab is used to review all of the assignment profiles to which a user belongs.
 - The **Library Access** tab lists all the libraries that a user can access.
 - The **Approval Role** tab is used to associate the user with an approval role so that an administrator can assign the role to the user for an approval process.
 - The **User Groups** tab is used to look up a learner's user group membership to troubleshoot finance account activity or reserved seats in classes.
 - The **Finance** tab is used to edit the user's shopping account, billing, and shipping information.
 - The **Account Code** tab is used to select an authorized account code to associate with a user so that the user can purchase items that have a price using the chargeback payment method.
 - The **Preferences** tab is used to set or change a user's time zone, currency, locale, and locale format options.
 - The **Alternate Job Codes** tab is used to add and edit alternative job codes (also called secondary job codes) that are associated with a user; you can find a user's primary job code under User Details.
 - The **Phone Numbers** tab is used to create or manage the different phone numbers that are associated with a user.
 - The **Accreditation Type** tab is used to add an Accreditation ID to the user.
 - The **Occupational Category** tab is used to add and edit the occupational category for the user.

Notes: _____

Actions Area

3. The **Actions** area of the user record contains links to additional actions that can be taken on the user record, including:
 - **Manage Assignments:** Initiates the Manage Assignments tool to enable you to batch assign items and curricula to one or more users.
 - **Manage Registration:** Initiates the Registration Assistant tool.
 - **Launch Proxy:** Initiates the proxy feature, which displays the user view of the TMS.
 - **Send Email Notification:** Initiates the ad hoc notification wizard.
 - **Learning History Report:** Runs the Learning History report for the user.
 - **Manage Alternate Managers:** Allows you to identify alternate managers for the user.

Notes: _____



Slide 40: Activity #3: User Records

Activity #3: User Records

- Now you will have an opportunity to practice working with user records in the VA TMS.
- Complete the steps for Activity #3 on the next page.
- If you have any questions during the activity, send them to me using the Chat feature.

Notes: _____



Activity #3: User Records

1. Navigate to **People > Users**.
2. Enter “**dmlm**” into the User ID field.
3. Select **Search**.
4. Choose a user by selecting the **User ID** link from the search results.
5. Select **Actions**.
6. Select **Launch Proxy**.
7. If there’s a Microsoft Teams Training Collection pop-up window, select **Continue**.
8. Select **Close Session**.
9. In the Related Area, select **User Details**.
10. Find the **Primary Manager** field.
11. Select **Learning History**.
12. Select the sort icon.
13. Choose **Descending** for Sort Order and **Status** for Sort by.
14. Select **OK**.

Notes: _____

The Learning History tab, which is located in the Related area, displays those items a user has completed, including the date those items were completed.

- a) True
- b) False



KNOWLEDGE CHECK

Slide 41: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

The Learning History tab, located in the Related area, displays those items a user has completed, including the date those items were completed.

- a) True
- b) False

What information can be found on the Assigned Items tab of the Related area of a user record?

- a) A transcript of all completed items
- b) A way to view which assignment profiles the user belongs to
- c) All learning assigned to the user
- d) Assign and manage curricula



KNOWLEDGE CHECK

Slide 42: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

What information that can be found on the Assigned Items tab of the Related area of a user record?

- a) A transcript of all completed items
- b) A way to view which assignment profiles the user belongs to
- c) All learning assigned to the user
- d) Assign and manage curricula

Notes: _____

Which of the following can **NOT** be found in the Actions area of a user record?

- a) Launch Proxy
- b) Manage Assignments
- c) Learning History
- d) Learning History Report



KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature.

Which of the following can **NOT** be found in the Actions area of a user record?

- a) Launch Proxy
- b) Manage Assignments
- c) Learning History
- d) Learning History Report

Slide 43: Knowledge Check

QUESTIONS?



TMS

VA

Questions?

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

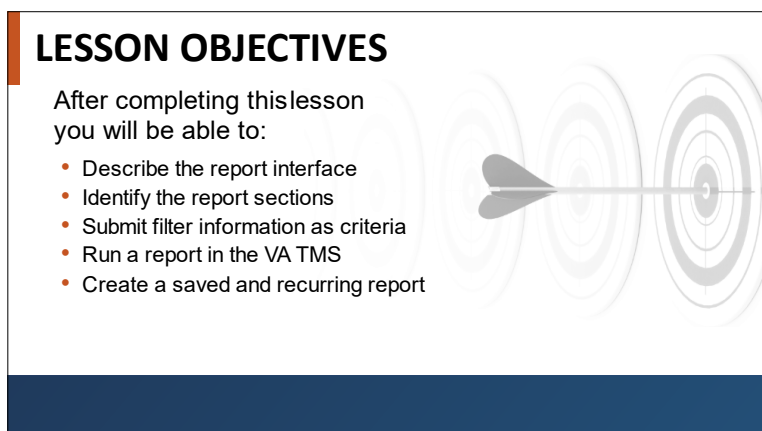
Slide 44: Questions?

Notes: _____

2.5 Lesson 4: Reports



Slide 45: Lesson 4: Reports



Slide 46: Lesson 4 Objectives

Lesson 4: Reports

A priority for many administrators is to be able to run detailed reports. The overall goal of this lesson is to provide you with the knowledge needed to use the VA TMS report interface to run, save, and create recurring report jobs.

Lesson 4 Objectives

After completing this lesson, you will be able to:

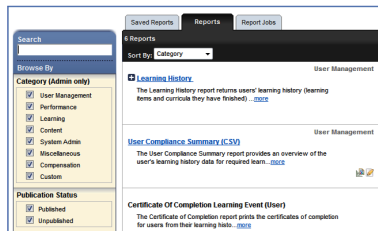
- Describe the report interface
- Identify the report sections
- Submit filter information as criteria
- Run a report in the VA TMS
- Create a saved and recurring report

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Reports Overview

The VA TMS report interface is broken down into three main tabs:

- Saved Reports
- Reports
- Report Jobs



Slide 47: Reports Overview

Reports Overview

The VA TMS is accessed either as an admin or as a user. Admins can run reports on users they have access to, which is determined by the security domain restrictions applied to their admin accounts.

Users are only able to run reports on themselves; however, if the user is listed as a supervisor in the VA TMS, that user can run a report on themselves and any of their direct or indirect subordinates.

The VA TMS report interface is broken down into three main tabs:

- Saved Reports
- Reports
- Report Jobs

Key Reports for Administrators

Some reports commonly used by TMS administrators:

- FISMA Compliance Report (e.g. FISMA Domain Summary)
- Item Status Report (grouped by item or user within date range)
- Curriculum Item Status Report
- Completion(s) Summary By Curriculum Report

Slide 48: Reports Overview

Key Reports for Administrators

Here are some examples of reports commonly used by TMS administrators:

- **FISMA Compliance Report:** Shows compliance with the Privacy and Information Security Course. Can be run for entire security domain using the FISMA Domain Summary version.
- **Item Status Report:** For each user and item specified, will show completion status within a certain date range (e.g.: the last 3

Notes: _____

or 6 months). Can be grouped by item or user.

- **Curriculum Item Status Report:** For each specified user, shows assigned curricula, curriculum status, and status of the items within those curricula.
- **Completion(s) Summary By Curriculum Report:** Prints percent completions of items grouped by curriculum.



Slide 49: Demonstration: Reports

Demonstration: Reports

Now the instructor will demonstrate how to run reports.

This is a detailed demonstration, so you are encouraged to take notes and let the instructor know if you need anything to be shown a second time.

Notes: _____



Demonstration: Reports Overview

Reports

The most common use of the Reports tab is to run available reports within the system.

- To find the desired report, browse the provided list under the Reports tab or use the **Search** textbox and **Browse By** options on the left side of the report interface to search for reports by the title or description.
- To further assist in the search for a desired report, narrow the search results by checking the corresponding checkbox on the left-hand side to select very specific categories of reports. For instance, choosing the **User Management**, **Learning** or **Content** categories.
- The functions that you may perform in the reports section are controlled by report workflows given to you by the system administrator.

Saved Reports

Once you create a saved report, you can access the report and run it without reentering filtering options.

- Saved reports are located under the **Saved Reports** tab and are specific to your admin account, meaning that saved reports are not shared among admins in the system.
- A saved report is very similar to a saved search in the VA TMS—only the admin who created the saved report is able to see it.
- Enter the redundant search criteria before selecting save. This will allow you to save information for later use. If you change any of the criteria, don't forget to save the report again to keep your changes.

Report Jobs

The **Report Jobs** tab lists the current report jobs which are automatically running in the background.

- Reports that are scheduled to run only once display under **System Admin > Background Jobs**. They will also display on the **Report Jobs** tab when they are finished.
- Jobs are created under this tab when you schedule the report to occur on a recurring basis. On this tab, you can delete jobs from recurring or edit the schedule of when the report should run.

Notes: _____

Run A Report

1. Select the **Reports** icon in the navigation area.
2. Type **Learning History** in the Search Category area and select submit. Remember you can select one or more categories from the search options or scroll through all reports listed.
3. From the search results, locate the **My Learning** report. Expand the sub-reports by choosing the plus icon. Within the options, select the **Learning History** link. The Run Report screen displays.

Formatting

In the top section of the Run Report screen choose the following formatting options:

1. Enter today's date before the report title.
2. Enter Test Report in the Report Header field.
3. Enter For Training Use Only in the Report Footer field.
4. Choose **Browser** in the Report Destination drop-down menu. If Local File was selected, you must first save the file to a local drive before you can open it.
5. Select **HTML** from the Report Format drop-down menu. **Note:** If you select a **CSV** (Comma Separated Value) **Report**, the only report destination you will select is Local File, and the only report format that is displayed is CSV.

Criteria

Remember, the selected report dictates the criteria displayed at the bottom of the Run Report screen. This section provides all the tools and functionality for searching. Report pages filter the data that the report returns using specific search fields. Many reports, however, also contain the following controls for filtering the data that you want to return:

1. Select the **Mask User IDs** button. **Note:** For security reasons, the VA TMS can mask the user IDs so they display as a series of asterisks. Check the checkbox to hide user IDs.
2. Select Yes to perform a Case sensitive search. **Note:** You can choose to perform a case-sensitive search or a case-insensitive search. Case-sensitive searches return data elements only when the characters and case match. Case-sensitive searches run faster than case-insensitive searches.
3. Select the Page Break Between Records button. **Note:** In order to segregate data, there is an option to insert page breaks between records. Some fields in the report pages contain a **Filter by Criteria** link. When you select the link, a page opens that contains multiple search fields in which you can select a set of data rather than a single data element. For

Notes: _____

example, you can return the set of users who are in the job location, Washington, DC, rather than entering multiple users in the search field.

4. Choose the **filter** icon next to users. Pull in two or three users by searching for **DMLMUSER**.
5. You can also select **Completed To** and **Completed From** dates using the calendar icon to select a particular time frame. If left blank, they will use the current date.
6. Leave the defaulted selections for **Report Type**, **Include**, **Print Comments**, and **Sort By** fields.
7. Select the **Schedule Job** button from the bottom right.
8. Choose the radio bullet next to **Run this job immediately, if allowable**. For certain reports, you may want to schedule a report to run at night or over the weekend. They can also be set up to run on a recurring basis.
9. **For Training Only** – uncheck the **Notify via email on completion** checkbox.
10. Select the **Finish** button. **Note:** You can edit the schedule details and status of this background report job in the **Background Jobs** module under the **System Admin Tab** until it has completed successfully, after which it will appear in your **Report Jobs** list.

Second Report Demonstration

In our second demonstration, we want to run a **FISMA** (Federal Information Security Modernization Act) **Compliance Report** as well as setup a saved report.

1. Enter **FISMA** in the Search Category area and select Submit.
2. Select **FISMA Domain Summary** report from the report options available.
3. Select any needed criteria. For Security Domain, search for “TRAIN”
4. Select the **Save Report** button.
5. In the **Saved Report ID**, enter a short name for the report. This will allow you to search from saved reports later.
6. Enter a description for the report in the **Description** field to make it easier to identify.
7. Select the **Submit** button from the bottom right of the screen.
8. To access a saved report, select the **Saved Reports** tab.
9. Locate the saved report and select **Launch** from the **Action** column.
10. If necessary, adjust any of the criteria for the report.
11. Select the **Schedule Job** button. A warning message will display if you have changed any of the criteria. **Warning:** You have opted to schedule a saved report as a background

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report, however you have modified their report criteria without saving these changes. If you continue, the report that is being scheduled will be disassociated from the saved report, meaning that we'll honor your change criteria for this report, but subsequent changes to the saved report will not be reflected in THIS scheduled report job.

- If you intended to make changes to the saved report, select the no button below and save the modified report criteria then schedule the report job.
- Do you wish to schedule this report from a snapshot of the current set of modified criteria?

12. For this demonstration, select the **Yes** button.

13. Schedule the report to **Run this job immediately, if allowable**, by selecting the radio bullet.

14. Select the **Finish** button.

Third Report Demonstration

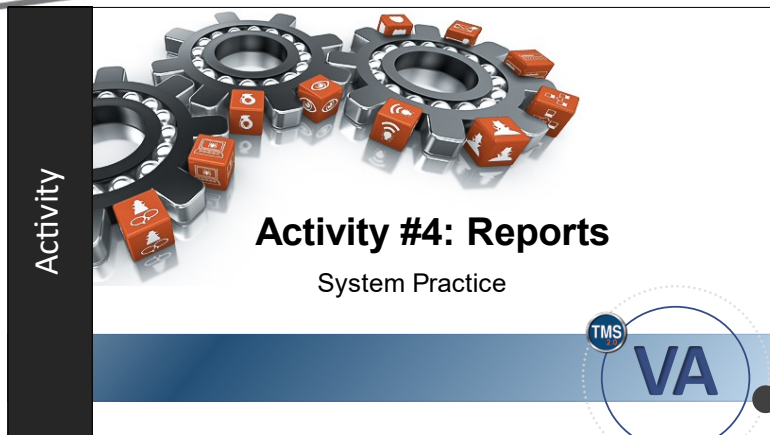
In our third demonstration, we want to run an **Item Status Report** as well as demonstrate how to set up a recurring report.

1. Enter **Item Status** in the Search Category area and select Submit.
2. Select **Item Status Group By Items** report from the report options available.
3. Select the search filter next to the ID box for the **Item** filter.
4. Enter Item Number **3730266** in the **Item ID** field.
5. Select **Search**.
6. When the Create Filter box materializes, select the **radio button** next to the **Item Title** under the **Select** column.
7. Select either **Add Filter** button.
8. Select **Submit Filter** at the top right of the Create Filter box.
9. You can also add other filters such as specific **Users**, or you can select **Completed To** and **Completed From** dates using the calendar icon to run the report for a particular timeframe. If left blank, they will use the current date.
10. Select **Schedule Job**.
11. Select the **Schedule this job to recur as follows** radio button.
12. Show the three options for recurring reports: Daily, Weekly and its dropdown menu, and Monthly and its dropdown menu. Select **Daily** as part of the demonstration.

Notes: _____

13. Enter the time in HH:MM AM/PM format for one-minute past where your clock is currently displaying. This will allow the system to run the report by the time you finish explaining the option to edit the schedule.
14. Select your **Time zone** from the dropdown menu.
15. Deselect the button next to **Notify via email upon completion**.
16. Select **Finish**. **Note:** When we are brought back to the Repots Tab, to view our newly created recurring report, we can select the Report Jobs tab. The recurring report has different options. This is where we can either edit the recurring schedule or delete the recurring report.
17. Select **Edit Schedule** under the new report.
18. If you would like to edit the schedule, make the changes you would like to see and select **Apply Changes**.
19. Select the **Results** tab to show the reports that have been run.

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Slide 50: Activity #4: Reports

Activity #4: Reports

Now that you have had a chance to look at the features of reports, go into the VA TRAIN on your own and run a **Learning History** report. Remember in the training environment you may have limited results.

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Activity #4: Reports

Run A Report

1. Select the **Reports** tab on the menu.
2. To search for a report, make sure to select the middle **Reports** icon in the navigation area.
3. Type **Learning History** in the Search Category area and select submit. Remember you can select one or more categories from the search options or scroll through all reports listed.
4. From the search results, locate the **My Learning** report. Expand the sub-reports by choosing the plus icon. Within the options, select the **Learning History** link. The Run Report screen displays.

Formatting

In the top section of the Run Report screen choose the following formatting options:

1. Enter today's date before report title.
2. Enter **Test Report** in the **Report Header** field.
3. Enter **For Training Use Only** in the **Report Footer** field.
4. Choose **Browser** in the **Report Destination** drop-down menu. If **Local File** was selected, you must first save the file to a local drive before you can open it.
5. Select **HTML** from the **Report Format** drop-down menu

Criteria

1. Select the **Mask User IDs** button.
2. Select **Yes** to perform a Case sensitive search.
3. Select the Page Break Between Records button.
4. Select the additional parameters needed for your report. Choose the **filter** icon next to users.
5. You can also select **Completed To** and **Completed From** dates using the calendar icon to select a particular timeframe. If left blank, they will use the current date.
6. Leave the defaulted selections for **Report Type**, **Include**, **Print Comments**, and **Sort By** fields.
7. Select the **Schedule Job** button from the bottom right.

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8. Choose the radio bullet next to **Run this job immediately, if allowable**. For certain reports, you may want to schedule a report to run at night or over the weekend. They can also be set up to run on a recurring basis.
9. **For Training Only** – uncheck the **Notify via email on completion** checkbox.
10. Select the **Finish** button.

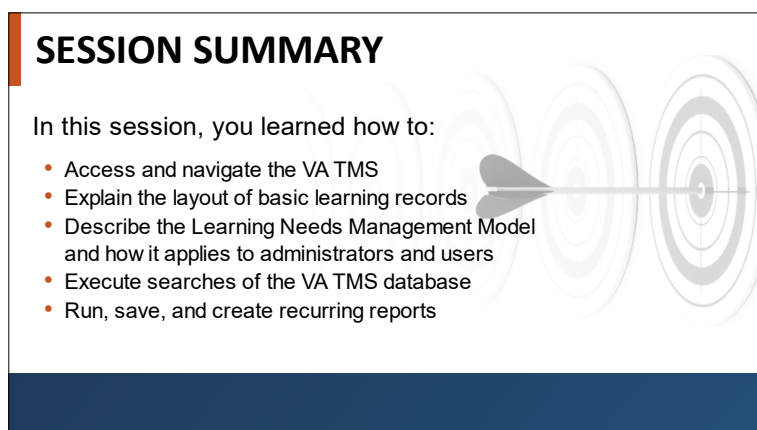
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Slide 51: Questions?

Questions?

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



Slide 52: Session Summary

Session Summary

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

- Access and navigate the VA TMS
- Explain the layout of basic learning records
- Describe the Learning Needs Management Model and how it applies to the admin and participant
- Execute searches of the VA TMS database
- Run, save, and create recurring reports

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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. Bashshar: Clarence.Bashshar@va.gov

Slide 53: Additional Resources

Additional Resources

There are additional resources available to assist you with your duties as an administrator. They are:

- The TMS Resources site has copies of job aids, tutorials, and participant guides for all TMS 2.0 training sessions: <https://www.hcsc.va.gov/>
- Those same materials can also be found on the TMS Community of Practice. Use the email address to request access: VATMSCoP@va.gov
- Additional assistance can be requested by contacting the VA Enterprise Service Desk at 1-855-673-4357
- Clarence.Bashshar@va.gov

Notes: _____

