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1.0 Training Overview

1.1 Introduction
Thank you for attending the Veterans Affairs (VA) Talent Management System (TMS) Training for Registration Managers course. This course is designed to teach administrators the core knowledge and skills that are necessary for completing tasks that are associated with Registration Managers.

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

1.2 Course Goal
This course provides information, demonstrations, and practice opportunities related to classes, time slots of a class, registering users for class, and adding to learning history in the VA TMS.

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

• Define, search for, and navigate a class
• Register and unregister users into classes
• Add, edit, and add users to cohorts
• Use the Add to Learning History for Multiple Courses tool
• Understand and utilize reports

1.3 Target Audience
This course is recommended for Registration Managers, Domain Managers, and Learning Managers.
1.4 Participant Guide
This Participant Guide 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>
<thead>
<tr>
<th>Table 1: Participant Guide Icons</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Icons</strong></td>
</tr>
<tr>
<td><img src="icon1.png" alt="Icon" /></td>
</tr>
<tr>
<td><img src="icon2.png" alt="Icon" /></td>
</tr>
<tr>
<td><img src="icon3.png" alt="Icon" /></td>
</tr>
</tbody>
</table>

1.5 Participant Preparation and Guidelines
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-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 into 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 VA TMS 2.0 Training for Registration Managers, along with estimated times.

Table 2: Lessons and Durations

<table>
<thead>
<tr>
<th>Lessons</th>
<th>Estimated Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome and Introduction</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Lesson 1: Classes</td>
<td>45 minutes</td>
</tr>
<tr>
<td>Lesson 2: Register and Unregister Users</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Lesson 3: Cohorts</td>
<td>20 minutes</td>
</tr>
<tr>
<td>Lesson 4: Add to Learning History</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Lesson 5: Learning History and Reports</td>
<td>15 minutes</td>
</tr>
<tr>
<td>Questions and Answers</td>
<td>10 minutes</td>
</tr>
</tbody>
</table>

Total: 2 hours, 40 minutes
2.0 VA TMS Training for Registration 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.
- 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.

System Login

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

- **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

Welcome

Welcome to VA TMS Training for Registration Managers.

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

Also, please make sure that you mute your phone lines to minimize any background noise during the training session.
**Participant Introductions**

Please use the chat feature to introduce yourself by sharing your name, including any nicknames and your VA division or location.

**Participant Guide**

Each of you has a Participant Guide that has been developed to support learning during and after this training session. This guide contains copies of all PowerPoint slides, space for taking notes, and directions for completing activities.

**Logistics**

- A 10-minute break will be provided roughly every hour.
- Feel free to ask questions at any time using the chat feature.
- Please ensure your audio is on mute.
**Course Goals**

The goal of this training is to provide instruction and interactive practice on the core concepts and administrative functions of the VA TMS specific to the Registration Manager role.

**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 participant engagement, and the content presentations 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 a DM or LM.

- **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 knowledge checks.
Session Agenda

Today’s session is organized into four lessons:

- Lesson 1: Classes
- Lesson 2: Register and Unregister Users
- Lesson 3: Cohorts
- Lesson 4: Add to Learning History
- Lesson 5: Learning History and Reports
- Questions and Answers

Session Objectives

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

- Define, search for, and navigate a class
- Register and unregister users into classes
- Create, edit, and add users to cohorts
- Use the Add to Learning History for Multiple Courses tool
- Understand and utilize reports

Questions?

If you have any questions about the material that will be covered in today’s session, please ask them using the chat feature at this time.
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classes</td>
<td>An instance of an item added to a calendar where resources can be added to it. Users can also enroll in the class.</td>
</tr>
<tr>
<td>Cohorts</td>
<td>Users who are tracked as a group and perhaps complete a series of scheduled training requirements.</td>
</tr>
<tr>
<td>Equipment</td>
<td>Reusable training objects (e.g., VCR, TV, video cameras, or LCD).</td>
</tr>
<tr>
<td>Facility</td>
<td>Building where training takes place (e.g., Headquarters).</td>
</tr>
<tr>
<td>Instructor</td>
<td>Person who will instruct or facilitate a specific portion of the class.</td>
</tr>
<tr>
<td>Location</td>
<td>Space or room within a facility (e.g., a classroom, computer lab).</td>
</tr>
<tr>
<td>Materials</td>
<td>Consumable training objects (e.g., notepads, markers, or specific training guides).</td>
</tr>
<tr>
<td>Reserved Seats</td>
<td>Seats in a class that are reserved for non-specific members of a given organization.</td>
</tr>
<tr>
<td>Resources</td>
<td>One or more assets that are assigned and reserved to a time slot within a class (e.g., an instructor, facility, equipment).</td>
</tr>
<tr>
<td>Time Slots</td>
<td>Unit of time within a class. A class must have at least one time slot. They are used primarily for resource management.</td>
</tr>
</tbody>
</table>
2.2 Lesson 1: Classes

**Classes**
Classes are instances of items used to manage resources, user registration, and course duration.

**Lesson 1 Objectives**
After completing this lesson, you will be able to:
- Define classes
- Search for classes
- Identify the main areas of a class record
Scheduling Management

Scheduling management is a term used to describe the process of creating classes within the VA TMS for instructor-led/instructor-led with online content items.

The Scheduling Manager is responsible for creating classes.

Scheduling Management

The first part of this lesson is intended to introduce what can be done within a class. Then, we will demonstrate this in TMS.

Scheduling management is a term used to describe the process of creating classes within VA TMS for instructor-led/instructor-led with online content items.

Scheduling Managers are responsible for creating classes. But as a Registration Manager, you must understand and work with classes.
Classes

Creating a class places an instance of the item on the calendar, allows resources to be associated, and users to be registered. Users are registered into classes by the admin, their managers, or themselves. The process also triggers email notifications that may be sent to participants, managers, instructors, and contacts associated with the class.

After creating instructor-led or instructor-led with online content items, the next step is to schedule them for a specific date, time, and location to track user registration.

Searching

Now we’ll discuss the Search features. 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
- Adjust the display of your search results
- Save your search to use later
- Sort your search results
- Export search results to Microsoft Excel
Recents

Use **Recents** to:

- Access recently visited records without having to use search filters
- Search your Recents to filter the listed results
- The Recents list calls out the type of record listed

**Recents**

A useful section of the admin screen is the Recents panel. You can access this panel by selecting the Recents tab on the Learning Administration home screen.

The Recents panel shows selected 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 any page in Learning Administration. You can also use the Search bar to filter your list of results. The listed records are also labeled with the type of record for each item (e.g., Item, Curriculum, etc.).

Class Record

The class record is divided into three (3) main areas:

1. Core (outlined at the top left)
2. Actions (outlined at the top right)
3. Related (outlined at the bottom half)

These areas contain fundamental information regarding the class. Some areas may be inaccessible (grayed out) depending on your role as an administrator within the system.

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Class Detail Settings

Selecting the Details tab in the Related area allows the Admin to adjust the settings of a class.

Note: Registration Managers do not have the permissions to edit the Details of a class record.

Demonstration: Searching

Now the instructor will demonstrate the searching function in the VA TMS.

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**Demonstration: Searching**

To search for a Class:

1. Select **Learning Activities** from the main menu.

2. Select **Classes** from the side menu tab.

3. Review Search options:
   - **Exact** = searches for an exact match of characters
   - **Any** = one or more exact searches separated by a comma
   - **Starts With** = a result starts with one or more specified characters
   - **Contains** = contains specified characters
   - **Does Not Contain** = does not contain specified characters
   - **Is Empty** = specified field is empty

4. If necessary, select **Add/Remove Criteria** to add the **Security Domains** field as part of the search criteria on the search screen. **NOTE:** Search criteria added to your search window will remain until you remove them.

5. The Search Criteria pop-up window displays. Select the **Security Domains** checkbox.

6. Choose **Select**.

7. The **Security Domain** criteria displays on the class search screen. Enter **TRAIN** in the Security Domain field.

8. In the **Class ID** field, enter the Class ID assigned to you via the roster.

9. Remove the date in the **Start Date After** field.

10. Select **Search**.

**To save a search:**

1. From the completed search page (above), select **Save As**.

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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.

3. Select Submit.

To access your saved searches:
1. Select the Saved Searches text link at the upper right corner of the content frame.
2. Select the search you want to conduct.
3. The selected search screen displays. The saved search ID and description are displayed at the top.

Navigate to Recents:
1. From the learning administration page (above), select Recents
2. Using your mouse or keyboard, activate the Search bar and enter User.

Class Record:
1. From the search results, select a Class ID hyperlink.
2. Point out the Core, Related, and Actions area.

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Activity #1: Searching and Class Records

Now you will have an opportunity to practice working, searching, and viewing class records in the TMS.

Please complete the steps for Activity #1 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.
Activity #1: Searching and Class Records

To Search for a Class:

1. Select **Learning Activities** from the main menu.
2. Select **Classes** from the side menu tab.
3. Review Search options:
   - **Exact** = searches for an exact match of characters
   - **Any** = one or more exact searches separated by a comma
   - **Starts With** = a result starts with one or more specified characters
   - **Contains** = contains specified characters
   - **Does Not Contain** = does not contain specified characters
   - **Is Empty** = specified field is empty
4. If necessary, select **Add/Remove Criteria** to add the **Security Domains** field as part of the search criteria on the search screen. NOTE: Search criteria added to your search window will remain until you remove them.
5. The Search Criteria pop-up window displays. Select the **Security Domains** checkbox.
6. Choose **Select**.
7. The **Security Domain** criteria displays on the class search screen. Enter **TRAIN** in the Security Domain field.
8. In the **Class ID** field, enter the Class ID assigned to you via the roster.
9. Remove the date in the **Start Date After** field.
10. Select **Search**.

Notes:

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_______________________________________________________________________________
To save a search:
1. From the completed search page (above), 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.
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To access your saved searches:
1. Select the Saved Searches text link at the upper right corner of the content frame.
2. Select the search you want to conduct.
3. The selected search screen displays. The saved search ID and description are displayed at the top.

Navigate to Recents:
1. From the learning administration page (above), select Recents
2. Using your mouse or keyboard, activate the Search bar and enter User.

Class Record:
1. From the search results, select a Class ID hyperlink.
2. Survey the Core, Related, and Actions area.

Job Aids: Available on the TMS Resource site.
Knowledge Check

Answer the following question using the chat feature.

A class 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**

Answer the following question using the chat feature.

What are the main areas of a class record?

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

**Questions?**

What questions can I answer for you about the material we have covered so far?
2.3 Lesson 2: Register and Unregister Users

Lesson 2: Register and Unregister Users

Now that you know how to search for classes in VA TMS, you can now focus on registering users. In this lesson, you will learn to register and unregister users for classes.

Lesson 2 Objectives

After completing this lesson, you will be able to:

- Properly search for users
- Define the four registration statuses
- Register users for a class
- Use the Manage Registration tool

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How Users Register

How a user registers for a class is determined on a class-by-class basis. If configured, users may self-register. Managers may also be given the ability to register their direct reports. Otherwise, admins must register users in classes.

When users are officially registered and have a status of Enrolled, the system can generate email notifications and send them to the user, his or her immediate manager, the instructor, and any other contact associated with the class.

User Search Selector

When admins are selecting users to register for a course, they may need to view users’ item needs.

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

Note: Steps to add criteria to search:
People > Users > Add/Remove Criteria > Item Needs > Select
Registration Statuses

A user may have one of the following VA TMS defined registration statuses:

- **Enrolled:** The user has a seat in the class.
- **Waitlisted:** The user is waiting for a seat to open. If Auto Enroll from Waitlist is set to yes then, the VA TMS automatically registers a waitlisted user when another user cancels/withdraws.
- **Canceled:** The user no longer has a seat in the class (either the user withdrew or the instructor canceled the class).
- **Pending:** The user is pending approval in VA TMS.

**Demonstration: Registration**

Now the instructor will demonstrate how to register a user for a class in VA TMS.
Demonstration: Registration

1. Navigate to Learning Activities > Classes.

2. Enter search criteria to search for the class you were assigned. You can also find the record in your Recents. In the search results, select the Class ID for the desired class.

3. Select the Registration tab in the Related area.

4. Select the Add Users button and choose Add Users.

5. Enter search criteria to search for users with User ID containing DMLM.


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 Active Registration section.

Note: The Core Area of the class record will also display the number of seats taken and the number that remain open as users are registered.

Note: In Live TMS, the admin should send the TMS notifications to all parties involved. In the Train Environment, there are no emails, so we must skip this step to avoid an error message.
Activity #2: Registration

Now you will have an opportunity to practice using the registration feature in the VA TMS.

Please complete the steps for Activity #2 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.
Activity #2: Registration

1. Navigate to Learning Activities > Classes.

2. Enter search criteria to search for the class you were assigned. You can also find the record in your Recents. In the search results, select the Class ID for the desired class.

3. Select the Registration tab in the Related area.

4. Select the Add Users button and choose Add Users.

5. Enter search criteria to search for users with User ID containing TMS or DMLM.


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 Active Registration section.

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

Answer the following question using the chat feature.

Which of the following are registration statuses in the VA TMS? (Choose all that apply)

a) Seat Reserved  
b) Auto-Filled  
c) Pending  
d) Enrolled

Manage Registration Tool

Manage Registration is a tool that helps streamline the process of registering users from the admin side of VA TMS. Using this tool, you may register users, withdraw users, or reserve seats for an organization’s users.

This tool can be useful for administrators who have the responsibility of registering users for classes but do not have any setup or maintenance responsibilities for the class record itself.

The Manage Registration tool can be found in the Actions area of a user record. Multiple users can be added through this process.
Demonstration: Manage Registration Tool

Now the instructor will demonstrate the Manage Registration Tool function in VA TMS.
**Demonstration: Manage Registration Tool**

1. Navigate to **People > Users**.

2. Search for **User IDs** that start with **DMLMUSER** and open a User Profile by selecting the User ID hyperlink in the search results.

3. Navigate to the **Actions** area. Select **Manage Registration**.

4. **Step 1: Select Action.** Ensure Register Users is the active radio button and select **Next**.

5. **Step 2: Select Class.** Select the magnifying glass icon. Search for your assigned class.

6. Choose **Select** next to the class for which you would like to register users.

7. Select **Next**.

8. **Step 3: Add Users.** Select **Add** next to the user already listed. You can add more users by selecting **add one or more from list**.

9. After adding all your users, select **Next**.

   **Note:** If you receive a warning message about scheduling conflicts with the user you’ve selected, choose Yes to bypass the message.

10. **Step 4: Edit Assignment.** Add any comments you would like. Select **Next** to move on.

11. **Step 5: Edit Financial Data.** Select **Next** to bypass this step.

12. **Step 6: Record Registration.** Review your selections. If you need to make any changes, select **Previous** to return to the appropriate step. Unselect any active buttons in the Email confirmations to area and select **Finish**.

   **Note:** In Live TMS, the admin should send the TMS notifications to all parties involved. In the Train Environment, there are no emails, so we must skip this step to avoid an error message.

The process status now confirms you are finished and will note: “All registrations in this class were successful.”

Notes:

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Activity #3: Manage Registration Tool

Now you will have an opportunity to practice using the manage registration feature in the VA TMS.

Please complete the steps for Activity #3 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.
Activity #3: Manage Registration Tool

1. Navigate to People > Users.

2. Search for User IDs that start with DMLMUSER and open a User Profile by selecting the User ID hyperlink in the search results.

3. Navigate to the Actions area. Select Manage Registration.

4. Step 1: Select Action. Ensure Register Users is the active radio button and select Next.

5. Step 2: Select Class. Select the magnifying glass icon. Search for your assigned class.

6. Choose Select next to the class for which you would like to register users.

7. Select Next.

8. Step 3: Add Users. Select Add next to the user already listed. You can add more users by selecting add one or more from list.

9. After adding all your users, select Next.

   Note: If you receive a warning message about scheduling conflicts with the user you’ve selected, choose Yes to bypass the message.

10. Step 4: Edit Assignment. Add any comments you would like. Select Next to move on.


12. Step 6: Record Registration. Review your selections. If you need to make any changes, select Previous to return to the appropriate step. Unselect any active buttons in the Email confirmations to area and select Finish.

   Note: In Live TMS, the admin should send the TMS notifications to all parties involved. In the Train Environment, there are no emails, so we must skip this step to avoid an error message.

The process status now confirms you are finished and will note: “All registrations in this class were successful.”
Knowledge Check

Answer the following question using the chat feature.

The only area where admins can register users for classes is the Registration tab of a class record.

a) True
b) False
Reserved Seats

• Reserved Seats allow you to reserve slots for an Organization or User Group in a class without having to register specific users
• As seats are reserved, the number of open seats decreases by that number

Slide 36: Reserved Seats

Reserved Seats

When an organization within the VA requests seats in a class but cannot provide the names of the individuals who will attend, you can use the Reserved Seats feature of the VA TMS. Reserved Seats allow you to reserve slots in a class without having to register specific users. For example, if a specific class requires 10 employees, but the specific employees are not known, reserved seats can hold those places.

Reserved Seats are reserved for organizations, enabling only users who belong to the organization or user group to self-register (if self-registration is enabled) or be registered by a manager or admin. If the class is full but reserved seats are remaining, users who are not a member of the organization or user group may only join the registration as Waitlisted.

Admins can register any user regardless of whether the reserved seats have been filled and will not affect the number of reserved seats if the user does not belong to the correct organization or user group.

As reserved seats are reserved, the number of open seats decreases by that number in the Core Area.

Notes: __________________________________________________________
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Demonstration: Reserved Seats

Now the instructor will demonstrate the reserved seats function in the VA TMS.
**Demonstration: Reserved Seats**

1. Navigate to **Learning Activities> Classes**.

2. Enter search criteria to search for the class (Use “Exact” and the Class ID you created, or just use **Recents** to access the record).

3. Select the **Seat Reservations** tab in the Related area.

4. Select the **Add** button.

5. In the Reserve Seats window, ensure the **Organization** radio button is selected.

6. Select the search icon and search for any organization. Select an organization from the search results by choosing the **Select** link next to the listed record.

7. Enter “10” in the **Reserved Seats** field.

8. Select **Save**.

Once seats 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 seats, 12 seats remain available for other users.

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**Talent Management System**
Activity #4: Reserved Seats

Now you will have an opportunity to practice reserving seats in the VA TMS.

Please complete the steps for Activity #4 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.
**Activity #4: Reserved Seats**

1. Navigate to **Learning Activities> Classes**.

2. Enter search criteria to search for the class (Use “Exact” and the Class ID you created, or just use **Recents** to access the record).

3. Select the **Seat Reservations** tab in the Related area.

4. Select the **Add** button.

5. In the Reserve Seats window, ensure the **Organization** radio button is selected.

6. Select the search icon and search for any organization. Select an organization from the search results by choosing the **Select** link next to the listed record.

7. Enter “10” in the **Reserved Seats** field.

8. Select **Save**.

---

**Notes:**

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**Knowledge Check**

Answer the following question using the chat feature:

Reserved Seats allow you to reserve spaces in a class without having to register specific users.

a) True  
b) False

**Questions?**

If you have any questions about the material covered so far, please ask them using the chat feature at this time.
2.4 Lesson 3: Cohorts

Lesson 3: Cohorts

This lesson shows you how to create, edit, and add users to a cohort in the VA TMS. Let’s look at the learning objectives for Lesson 3.

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Describe the benefits of grouping users into a cohort
- Create new cohorts
- Edit existing cohorts
- Add users to cohorts
Cohorts Defined

Cohorts are generally used as a grouping tool for users who go through a common set of classes. Creating, maintaining, and deleting cohorts are manual (not automatic) processes. Creating a cohort makes it easier to:
- Generate group reports
- Schedule groups

Creating, maintaining, and deleting cohorts are manual processes that must be completed by an administrator. They are not automatically generated by VA TMS.

While cohorts generally include a list of users with related classes, it is possible to have one without the other. For example, you can add classes to a cohort and add users later, or you can add users to a cohort and later add the class.

Demonstration: Working with Cohorts

Now the instructor will demonstrate how to create a cohort, edit a cohort, and add users to a cohort.

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Demonstration: Working with Cohorts

Create a Cohort:

1. Go to People > Cohorts > Add New.

2. Enter a Cohort ID (TRA-Your Initials-Today’s Month and Day).

   **Note:** The VA currently requests a specified naming convention for cohorts. The first part of the ID is the three or four-character security domain ID, followed by a hyphen. The next part is a three-digit, sequential number. *You must perform a search each time to find the next number to use.*

   **Note:** This 3-digit number must change each time the course is taught. If not, the record will already exist.

3. Enter Training Cohort for Demo Purposes only as the Description.


5. Explain that Curriculum is not mandatory. Typically, admins will build a curriculum for the cohort first and then search for it on this page. However, for this demonstration, choose an existing curriculum within the TRAIN domain.


7. Select a Start Date and End Date. Use today’s date for the start date and one year out for the end date.

8. Select Add. You have successfully added a cohort.

Add Users to a Cohort:

1. From the Cohort record, select the Users tab.

2. Select Add one or more from list.

3. Enter search criteria of User ID contains DMLMUSER and select search. If User ID is not listed, use Add/Remove Criteria to add it to your listing.

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4. Select the checkbox(es) of the User(s) you want to add to the cohort.

5. Select the Add button. You have successfully added users to a cohort.

**Edit a Cohort:**

1. Navigate to People > Cohorts.

2. Enter search criteria for the cohort you just created. Select Search.

3. Select the edit icon (e.g., pencil) next to the cohort you are searching for.

4. Change the Start Date.

5. Select Apply Changes. You have successfully edited a cohort.
Activity #5: Creating a Cohort

Now you will have an opportunity to create and edit a cohort in the VA TMS.

Please complete the steps for Activity #5 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.
Activity #5: Creating a Cohort

Create a Cohort:

Complete the activities below. In this training, use the naming convention we showed in the demonstration. In the live TMS, be sure to follow VA business policy naming conventions when creating your Cohort ID.

1. Go to People > Cohorts > Add New.

2. Enter a Cohort ID (TRA-Your Initials-Today’s Month and Day).

   Note: The VA currently requests a specified naming convention for cohorts. The first part of the ID is the three or four-character security domain ID, followed by a hyphen. The next part is a three-digit, sequential number. You must perform a search each time to find the next number to use.

   Note: This 3-digit number must change each time the course is taught. If not, the record will already exist.

3. Enter Training Cohort for Demo Purposes only as the Description.


5. The Curriculum is not mandatory. Typically, admins will build a curriculum for the cohort first and then search for it on this page. However, for this demonstration, choose an existing curriculum within the TRAIN domain.


7. Select a Start Date and End Date. Use today’s date for the start date and one year out for the end date.

8. Select Add. You have successfully added a cohort.

Add Users to a Cohort:

1. From the Cohort record, select the Users tab.

2. Select Add one or more from list.

Notes:
3. Enter search criteria of User ID contains DMLMUSER and select search. If User ID is not listed, use Add/Remove Criteria to add it to your listing.

4. Select the checkbox(es) of the User(s) you want to add to the cohort.

5. Select the Add button. You have successfully added users to a cohort.

**Edit a Cohort:**

1. Navigate to People > Cohorts.

2. Enter search criteria for the cohort you just created. Select Search.

3. Select the edit icon (e.g., pencil) next to the cohort you are searching for.

4. Change the Start Date.

5. Select Apply Changes. You have successfully edited a cohort.

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

Answer the following question using the chat feature.

Creating cohorts is an automatic process.

- a) True
- b) False

Knowledge Check

Answer the following question using the chat feature.

Which of these items should be included in the Cohort ID? (Choose all answers that apply)

- a) Your domain
- b) The word “cohort”
- c) Your last name
- d) A sequential three-digit code starting at 001

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Questions?

If you have any questions about the material covered so far, please ask them using the chat feature at this time.
2.5 Lesson 4: Add Learning History

Lesson 4: Add Learning History

After a class has been completed, you must then add learning history for all participants. In this lesson, you will learn how to add a learning history.

Adding learning history creates a record for users and allows those users who successfully completed an item the opportunity to generate a certificate of completion.

Lesson 4 Objectives

After completing this lesson, you will be able to:

- Define learning history
- Record a learning history for a class
- Record attendance for specific time slots
Learning History

A learning history 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)

Learning History

Using the Add Learning History tool, you may record the completed learning for users.

When you are informed that training has been completed, you can use the Add Learning History tool to capture this information. Once the event is recorded, a Learning History (Completed Work) record is created that captures the completed item, the date/time of completion, and the status the user was given. If an error is recorded, you can edit it with the Edit Learning History tool.

A learning history is a record of:

• A successful completion of an 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.

Using the Add Learning History for Multiple Courses, you may choose to record completions for all users registered in a selected class.

The system also lets you record history for those users who were never registered! This is useful for last-minute

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participants who were not registered in the class but did attend. However, it is recommended for you to register users (reconcile the roster) in the class even after the delivery date has passed for reporting purposes.
Types of Learning History

A Learning History is a user’s participation in the completion of an item, such as an internal or external event. Two types of learning history in the VA TMS:

- Item-based events (including classes)
- External events

Item-Based Events

Item-based events are the primary events found in the user’s list of learning events. Learning histories for items include those created as classes and those with online content, where the system records the learning history when the user completes the content.

External Events

An external event is a learning activity, such as a college course or a seminar outside of the organization, for which there is no item record in VA TMS and which may be recorded in a user’s Learning History. This external event has a description and comment field to further identify the nature of the training.

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Learning History Codes

Completion status codes may include:
- Substitution Credit
- Attempted for Credit
- Attended Without Certificate
- Complete
- Complete for Contact Hours
- No Credit Granted
- Incomplete
- No Show

Data Recorded in Learning History

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

Learning History Codes

Completion status codes may include:
- Substitution Credit
- Attempted for Credit
- Attended Without Certificate
- Complete
- Complete for Contact Hours
- No Credit Granted
- Incomplete
- No Show

Data Recorded in Learning History

Recording a learning history captures data such as:
- User information
- Item title
- Item status (grade or code)
- Completion date/time
- Completion status code (indicates whether an item was successfully completed)

Notes:
Record Classes Before End Date

- Admins may record learning for a class before the class end date.
- Admins may not record learning before the class start date.
- Admins will navigate to: Manage User Learning > Add Learning History for Multiple Courses.

Add Learning History from the Class Page

- Admins can add a learning history from the class page.
- The wizard populates the class details and the enrolled users.
- To use this feature, administrators must have the required role to record learning history.

Record Classes Before End Date

Admins may record learning for a class before the class end date. However, they may not record learning before the start date.

Navigate to: Manage User Learning > Add to Learning History for Multiple Courses.

Add Learning History from the Class Page

Administrators can also record a learning history from the class page.

The advantage of recording learning from the class page is that the wizard populates the class details and the enrolled users.

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Demonstration: Add a Learning History

Now the instructor will demonstrate how to add a learning history in the VA TMS.
Demonstration: Add a Learning History

Using the Add Learning History for Multiple Courses Tool:

1. From the learning administration menu, select Manage User Learning > Add Learning History for Multiple Courses (there is no Add Learning History for Single Course).

2. Choose the Class radio button.

3. Select the magnifying glass icon next to Class ID.

4. Enter search criteria for your assigned class and select Search.

5. Select the Add checkbox(es) of the Class(es) for which you want to record learning history.

6. Select Add.

7. Choose User IDs by selecting the magnifying glass.

8. Enter search criteria (User ID: DMLMUSER) and select Search.

9. Select the Add checkbox(es) of the user(s) to for which you want to record the learning history.

10. Select Add.

11. Select the Next button at the top of the page.

12. Edit details. Choose the required completion type from the drop-down list. Select VA Complete (VA Complete) - for credit.

13. Select the Next button at the top of the page.

14. Confirm all selections listed on the page. You can also change the way competencies are assessed by selecting Assess all items, Do Not Assess, or leaving Assess based on item setting selected.

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15. Select the **Submit** button at the top of the page.

A completion page confirms that the Learning events were recorded successfully. A button also allows you to start over and record more learning events.

**From the Class Record:**

1. From the learning administration menu, navigate to **Learning Activities > Classes**.
2. Enter search criteria to find your assigned class.
3. Delete the **Start Date After**.
4. Select **Search**.
5. Select a **Class ID** hyperlink from the search results listing.
6. Select the **Actions Menu**.
7. Select **Add to Learning History**.
8. The registered users will display as selected users by default.
9. To select additional users, choose the **add one or more from list** text link.
10. Enter search criteria and select **Search**.
11. Select the checkbox(es) of the user(s) for which you want to record the learning history.
12. Select **Add**.
13. Select the **Next** button at the top of the page.
14. To add a default status for all users, select the **Apply Default Status** drop-down menu and select **VA Complete (VA Complete) – for credit** status.
15. Select **Apply** to automatically fill each user’s completion status.
16. Enter **Comments**, and if still needed, add the **Status** of the learning event for each user.

**Note:** VA TMS does not recognize Grades so leave this field blank.

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17. Select **Next**.

18. Select **Next** on the Financial Data page. Admins do not currently add any financial data.

19. Review all data on the confirmation page, then select **Finish**.

20. A message dialog box appears, noting that the process may take more than a few seconds. Select **OK**.

21. A Finish screen appears, confirming that the learning event has been successfully recorded.
Activity #6: Add a Learning History

Now you will have an opportunity to practice recording learning in the VA TMS.

Please complete the steps for Activity #6 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.
**Activity #6: Add a Learning History**

1. From the learning administration menu, select **Manage User Learning > Add Learning History for Multiple Courses** (there is no Add Learning History for Single Course).

2. Choose the **Class** radio button.

3. Select the magnifying glass icon next to **Class ID**.

4. Enter search criteria for your assigned class and select **Search**.

5. Select the **Add** checkbox(es) of the Class(es) for which you want to record learning history.

6. Select **Add**.

7. Choose **User IDs** by selecting the magnifying glass.

8. Enter search criteria (User ID: DMLMUSER) and select **Search**.

9. Select the **Add** checkbox(es) of the user(s) to for which you want to record the learning history.

10. Select **Add**.

11. Select the **Next** button at the top of the page.

12. Edit details. Choose the required completion type from the drop-down list. Select **VA Complete (VA Complete) - for credit**.

13. Select the **Next** button at the top of the page.

14. Confirm all selections listed on the page. You can also change the way competencies are assessed by selecting **Assess all items, Do Not Assess**, or leaving **Assess based on item setting** selected.

15. Select the **Submit** button at the top of the page.

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A completion page confirms that the Learning events were recorded successfully. A button also allows you to start over and record more learning events.

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

Answer the following question using the chat feature:

What data can be recorded in a learning history?

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

Knowledge Check

Admins can record learning histories for users who were not originally registered in the class.

a) True
b) False
**Mark Attendance**

To record a user’s attendance, select the More link next to any time slot of the class. Once the more menu is opened, select Mark Attendance.

When you select this link, the Mark Attendance window opens, enabling you to record a user’s attendance for that time slot.

**Mark Attendance (continued)**

Record the user’s attendance by selecting the checkbox in the Attendance column. You can enter any comments for each user as well. Then, select Apply Changes to save your record.

If the class has multiple time slots, select Copy to Same Day Time Slots to copy the attendance record and any comments for all users from the current time slot to all time slots that start on the same day.

**NOTE:** Recording time slot attendance is for administrative use only. The system does not store this attendance with the user’s learning history.
Questions?

If you have any questions about the material covered so far, please ask them using the chat feature at this time.
2.6 Lesson 5: Learning History and Reports

Lesson 5: Learning History and Reports
As previously mentioned, recording a learning event creates a Learning History record for users. In this last lesson, we will view and run learner history reports. We will also look at other reports helpful to your job function.

Lesson 5 Objectives
After completing this lesson, you will be able to:
- Define Learning History
- Create a Learning History report
- Identify reports related to classes and cohorts
- Be familiar with Item Request reports

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Learning History

A learning history is a record of completed learning events for a user, which is found in the related area of a User Record.

A Learning History Report generates a report which contains one or multiple users’ completed learning events.
Other Related Reports

The following are reports in VA TMS that relate to classes and cohorts:
- Class Roster
- Learning Calendar
- Cohort Data
- Cohort Progress
- Registration Status

Other Related Reports

There are several reports in VA TMS that relate specifically to classes and cohorts:

Class Roster: The Class Roster report returns the roster of users in a class.

Learning Calendar: The Learning Calendar report returns all the daily classes or resource blocks scheduled between two dates.

Cohort Data: The Cohort Data report describes a cohort, including the learning items, curricula, and classes associated with the cohort, the users in the cohort, and other attributes of the cohort.

Cohort Progress: The Cohort Progress report returns the progress of users in a cohort toward completion of the cohort's learning.

Registration Status: The Registration Status report returns, for classes and users, a detailed list of registration information, including registration dates and times, enrollment numbers, instructors, and class details.

Note: Admins can also run an Items Request report, which will generate a report to the point of contact.
Demonstration: Run a Learning History Report

Now, the instructor will demonstrate running a Learning History report.
Demonstration: Run a Learning History Report

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

1. 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.

2. 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.

3. The functions that you may perform in the reports section are controlled by report workflows given to you by the system administrator.

Remember, to run User-related reports, select User from the Application section on the bottom right of the screen.

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

1. 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.

2. 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.
1. Reports that are scheduled to run only once display under System Admin > Background Jobs. They will also display on the Report Jobs tab.

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.

**Run A Report**

1. Select the Reports tab in the navigation area.

2. Type My 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 History report and select the link.


**Formatting**

The top section of the Run Report screen contains the following formatting options:

1. Modify the report title, header, and footer

2. Determine the report destination (the location where the report engine returns the data).
   - You can return the data to the browser or to a local file. When you select Browser, the report is displayed in the internet browser window. When Local File is selected, you must save the report to a local drive before you can open it. The VA does NOT use Remote File.

3. Determine the report format

   **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:

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• **Mask User IDs:** 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

• **Case sensitive search:** 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

• **Page Break between Records:** In order to segregate data, there is an option to insert page breaks between records

**Filter by Criteria:** 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 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.

1. Select the additional parameters needed for your report, including the users checked by the report.

2. Also, select **Completed To** and **Completed From** dates using the calendar icon to select the dates. If left blank, they will use the current date.

3. Select the **Schedule Job** button from the bottom right.

4. 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.

5. **For Training Only** – uncheck the **Notify via email on completion** checkbox.

6. Select the **Finish** button.

You can edit the schedule details and status of this background report job in the **Background Jobs** module until it has completed successfully, after which it will appear in your Report Jobs list.

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Activity #7: Run a Learning History Report

Now you will have an opportunity to practice running a Learning History report.

Please complete the steps for Activity #7 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.
Activity #7: Run a Learning History Report

Run A Report

1. Select the Reports tab.

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 Learning History 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 dropdown 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

Note: 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 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. 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.

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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.

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.

Job Aid: Available on the TMS Resource site.

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Knowledge Check

Answer the following question using the chat feature:

A Learning History is:

a) A record of all learning events completed by a user
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

Questions?

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

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

- Define, search for, and navigate a class
- Register and unregister users into classes
- Create, edit, and add users to cohorts
- Use the Add to Learning History for Multiple Courses tool
- Understand and utilize reports

Questions?

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

- TMS Resource Site: [https://www.hcsc.va.gov/](https://www.hcsc.va.gov/)
- Job Aids
- Participant Guides for each session
- TMS Administrators Community of Practice (COP)
  - For more information: [VATMSCoP@va.gov](mailto:VATMSCoP@va.gov)
- Help Desk
  - 1-855-673-4357
- Dr. Clarence Bashshar: clarence.bashshar@va.gov

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**Slide 74: Additional Resources**

**Additional Resources**

Here are some additional resources:

- TMS Resource Site:
  - [https://www.hcsc.va.gov/](https://www.hcsc.va.gov/)
- TMS Administrators Community of Practice (COP):
  - [VATMSCoP@va.gov](mailto:VATMSCoP@va.gov)
- Help Desk
  - 1-855-673-4357
- Dr. Clarence Bashshar: clarence.bashshar@va.gov

**Note:** Once you receive your admin roles for the TMS Production Environment, you will be able to log in to TRAIN with your regular TMS credentials and maintain the same roles. This can be very helpful in case you need to test anything before you create it or work with it in the live TMS.