VA TMS 2.0 Training for Scheduling Managers

Administrators Role-Based Training

Virtual Instructor-Led Training

Participant Guide

November 2020
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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 Scheduling Managers course. This course is designed to teach administrators the core knowledge and skills that are necessary for completing tasks that are associated with Scheduling 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 for classes
- Create, edit, and add users to cohorts
- Utilize Direct Links

1.3 Target Audience
This course is recommended for Scheduling 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>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS TRAIN environment.</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td>This icon indicates that participants will complete an activity in VA TMS TRAIN environment.</td>
</tr>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td>This icon indicates that there is a job aid available for the task.</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: Time Slots</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Lesson 3: Cohorts</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Lesson 4: Registration</td>
<td>25 minutes</td>
</tr>
<tr>
<td>Lesson 5: Direct Links for Classes</td>
<td>20 minutes</td>
</tr>
</tbody>
</table>

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

Welcome

Welcome to VA TMS Training for Scheduling 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 Scheduling 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 the following lessons:

- Lesson 1: Classes
- Lesson 2: Time Slots
- Lesson 3: Cohorts
- Lesson 4: Registration
- Lesson 5: Using Direct Links for Classes
- Questions and Answers

Session Objectives

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

- Create and edit classes
- Work with time slots
- Create and edit cohorts
- Register and unregister users for classes
- Utilize Direct Links

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 scheduled items used to manage resources, user registration, and course duration. In this lesson, you will learn how to create and configure classes.

Lesson 1 Objectives
After completing this lesson, you will be able to:
- Create a class
- Identify the main areas of a class record
- Add and delete ad hoc facilities
- Add instructors and equipment
- Copy or cancel a class
- Enable user requests

Notes:_______________________________________________________________________________
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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 the TMS.

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

Creating a class places an instance of the item on the calendar, allows resources to be associated with it, and allows users to be registered into it. 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/instructor-led with online content items, the next step is to schedule them for a specific date, time, and location in order to track user registration.

Adding a New Class

- To add a new class, select the item to schedule and determine a start date and time.
- Each class is composed of one or more time slots. A time slot is a block of time that can have resources assigned to it.
- Like items, classes are made available to users via libraries.

Adding a New Class

When you add a new class, you must select the item to schedule and determine a start date and time. The VA TMS creates the time slots of the class using the information from the Agenda tab from the Related area of the selected item record.

Each class is comprised of one or more time slots. A time slot is a block of time that can have resources assigned to it. Once the class is created, an authorized admin can change the time slot defaults.

Like items, classes are made available to users via libraries. When a new class is created, the admin has the option to publish the new class to all associated libraries. You may remove classes from certain libraries, thereby making specific classes available to some users but not others. However, a class cannot be added to a library that the item is not in.
Ways to Add a New Class

1. Learning Activities > Classes > Add New
2. From the Item Record, choose "Schedule" in the Actions area

Both methods launch the Add New Class page, where you will enter all relevant data for your new class. (Like Windows environment, you can do the same thing in different ways).

Ad Hoc Facilities

Ad Hoc Facilities can also be added from the Class page

Ad hoc means the facility may not be normally designated for training or meetings.
**Ad Hoc Facilities (Cont’d)**

- Classes support the assignment of an ad hoc facility for those offerings scheduled to take place at an external facility (e.g., hotel conference room).
- This is ideal when training is scheduled at locations that are not available as system records for re-use.

**Note:** This ad hoc facility is only available for this class.

**Delete Ad Hoc Facility**

Admins can remove an ad hoc facility by selecting the facility link on the Add New Class page and then selecting **Delete**.
Add or Select Location, Instructor, and Equipment

Admins can also add or select a location, instructor, or equipment for a class. Use the green and white plus icon to add an instructor, equipment, and/or location.

Custom Fields

Adding a custom field allows the admin to determine if the user will be selecting “Will you be utilizing government reimbursed travel?” to the class.
**Document Attachment to Classes**

- Allows you to add documents to classes to have a separate association to documents, just like you can do with items.
- Allows admins to post documents such as agendas and specific class-related material at the class level.

**User View: Preferred Region, & Facility**

- Users can enter a preferred region and facility when requesting a class.
- When region is selected, the facility list will default to those facilities in the selected region.
- No defined regions in VA TMS — admins will need to identify and enter the information.
- Admins should not enable requests unless really necessary.

**Document Attachment to Classes**

The system allows you to add documents to classes to have a separate association to documents, just like you can do with items.

It allows admins to post documents such as agendas and their specific class-related material at the class level.

**User View – Preferred Region and Facility**

Users can enter a preferred region and facility when requesting a class. When a region is selected, the facility list will default to those facilities in the selected region.

VA TMS does not have defined regions, so as an admin, you’ll need to determine this information and enter it into the system yourself. It’s important to be careful not to enable requests when creating items unless they are necessary.

Notes:

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Preferred Region and Facility

Users can enter a preferred region and facility when requesting a class. The region selection will default to the user’s assigned region. When a region is selected, the facility list will default to those facilities in the selected region.

Administrators can export the list of requests to a spreadsheet from the item record or filter the request list from the class to facilitate registering the right people into the right classes.

Filter Requests

Admins can also filter the request list from the class to facilitate registering the right people into the right classes.

For example, you may only want to offer a class to people in your own domain.

Notes:
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_____________________________________________________________________________________
Class Record Main Areas

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.

Class Settings

Selecting the Details tab in the Related area allows the Admin to adjust the settings of a class.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Displays to User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Information about the class for users, which allows for a second title.</td>
<td>Yes</td>
</tr>
<tr>
<td>Item Description</td>
<td>Information about the item for which the class is created. This is not viewable in the class record but appears when a user views the class.</td>
<td>Yes</td>
</tr>
<tr>
<td>Class ID</td>
<td>Automatically generated ID number for the class.</td>
<td>Yes</td>
</tr>
<tr>
<td>Active</td>
<td>Checkbox used to indicate whether a Class is active and in the user libraries.</td>
<td></td>
</tr>
<tr>
<td>Security Domain</td>
<td>Indicates administrator ownership of the class (e.g., OHRA, OFT).</td>
<td>Yes</td>
</tr>
<tr>
<td>Facility</td>
<td>Building where the class takes place.</td>
<td>Yes</td>
</tr>
<tr>
<td>Time Zone Displayed to User</td>
<td>Time zone of the class displayed to the user.</td>
<td>Yes</td>
</tr>
<tr>
<td>Approval Process</td>
<td>The type of approval process that is required to complete the registration. Self-registration must be checked before this feature is enabled.</td>
<td></td>
</tr>
<tr>
<td>Approval Required</td>
<td>This checkbox enables the approval process entered in the Process ID field.</td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Name of a contact person for the class (is included in the registration notification email).</td>
<td>Yes</td>
</tr>
<tr>
<td>Email</td>
<td>Email address of the contact person of the class (is included in the registration notification email).</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Notes:_______________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Displays to User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>Phone number of the contact person of the class (is included in the registration notification email).</td>
<td>Yes</td>
</tr>
<tr>
<td>Fax</td>
<td>Fax number of the contact person of the class (is included in the registration notification email).</td>
<td>Yes</td>
</tr>
<tr>
<td>Auto Enroll from Waitlist</td>
<td>Default for classes so that users are automatically moved from the waitlist to registration time slots as they open, if waitlisting is enabled.</td>
<td></td>
</tr>
<tr>
<td>Users can Waitlist</td>
<td>Option indicating that the system will allow users to be waitlisted for this item. If you select the AutoFill Registration option, waitlisted users automatically replace users who are withdrawn.</td>
<td>Yes</td>
</tr>
<tr>
<td>Comments</td>
<td>This field is for administrator informational purposes.</td>
<td></td>
</tr>
<tr>
<td>Closed</td>
<td>The class is over, and user registration cannot be changed.</td>
<td></td>
</tr>
<tr>
<td>Canceled</td>
<td>If canceled, user registration cannot be changed and sends cancellation notification.</td>
<td></td>
</tr>
<tr>
<td>Registration Close Date/Time/Time Zone</td>
<td>Last date and time (in specified time zone) that a user can change his or her registration status (e.g., registers or withdraws).</td>
<td>Yes</td>
</tr>
<tr>
<td>User can Self-Register</td>
<td>Option that enables the self-registration button to users so they can register for the class or begin the approval process, pending settings for the approval process.</td>
<td>Yes</td>
</tr>
<tr>
<td>Minimum Enrollment</td>
<td>Minimum number of users needed to hold the class.</td>
<td></td>
</tr>
<tr>
<td>Maximum Enrollment</td>
<td>Maximum number of users who can register in the class. Use Users can Waitlist to place excess users on the waitlist.</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Notes:_______________________________________________________________________________
___________________________________________________________________________________
___________________________________________________________________________________
___________________________________________________________________________________
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Displays to User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Status</td>
<td>Number of users registered and waitlisted, shown to user as “Capacity.”</td>
<td>Yes</td>
</tr>
<tr>
<td>Email Confirmations</td>
<td>TMS notifications to users, managers, instructors, and contact for registration as well a withdrawal.</td>
<td></td>
</tr>
</tbody>
</table>
**Demonstration: Add a New Class**

Now the instructor will demonstrate how to complete this task. For this demonstration, they will create a class by accessing the Classes menu in the TMS. Remember, however, that you can create a class through the item record.
Demonstration: Add a New Class

1. Navigate to Learning Activities > Classes.

2. Select Add New link. This opens the Add New Class window.

3. In the Summary Information section: Ensure Item is selected under Type.

4. Choose Department of Veteran Affairs under the Item Type dropdown.

5. Select the Item ID magnifying glass icon to search for the item to schedule (Item ID=3730266).


7. Select the item from your search results.

8. Specify a security domain (TRAIN) for the class.

9. Enter a description for this class.

10. Select the Publish in all associated libraries checkbox. Once saved, the system automatically adds this new class to every library that the item already belongs to. This makes the class visible and possibly available for users to self-register.

11. In the Class Information section: Select a start date, start time, and time zone. The scheduled start date and time and the scheduled end date and time (calculated via item time slots) will appear below the class information. The start date and start time must be in the future.

12. Select Preview to view the basic information for the class (Optional).

13. In the Resources section: Select the drop-down menu next to the plus sign by Facility.

14. Select Enter Ad Hoc Facility.

15. Enter information for the ad hoc facility on this page.

Notes:_______________________________________________________________________________
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_____________________________________________________________________________________
16. Select **Save**.

17. Select “X” in the upper right-hand corner to return to the Add New Class page.

18. You can remove what was added by selecting the link to the ad hoc facility and then selecting **Delete**.

19. If applicable, select the other resources associated with the class: **location, instructor,** and **equipment**.

**Note:** Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.

**Note:** The Resource Usage View drop-down window will allow the Admin to review the Resource allocation by Primary Location, Primary Instructor, or Equipment, which can aid in determining if there are resource conflicts.

20. In the Registration Form Custom Fields section, if you need to add the custom field for “Will you be utilizing Government reimbursed travel?” select the green and white plus sign and select the Search button, initiating a generic search.

21. Select the checkbox for **Add**.

22. Select the **Add** button at the top or bottom of the screen.

23. When you are finished, select **Save**.

24. If there are any warnings, the **Warning Details** screen displays. If this occurs, select **Yes** to continue.

25. The class record displays, allowing you to make further configurations.

Notes:_______________________________________________________________________________
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_____________________________________________________________________________________
Core Area, located in the upper part of the class

Admins can use the Core area of the selected class record to review the basic information of a class, including the title, class id, start date and time, item key details, instructor, location, facility, number of enrollees, number of waitlisted users, and open seats. The Core Area can also include any other fields deemed required by the global system administrators or added based on the Admins Personalized field preferences.

Actions Area, located to the right of the Core Area

In the Actions area, Admins can bookmark, copy, cancel, or delete a scheduled offering. You can also select Send Email Notification to send messages to users about scheduled offerings and adjust the body of the notification with the Launch Editor function. If you select the View Roster link, this quickly generates the Roster/Sign-In Sheet report that shows all users who are enrolled for that scheduled offering.

Related Area, located below the Core Area

The Related area contains additional information regarding the class, including registration information, associated libraries, and agenda details. Also, the details tab can be used to adjust additional settings for the class, email notification settings, and registration settings.
Activity #1: Add a New Class

Now you will have an opportunity to practice adding a new class 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: Add a New Class

1. Navigate to Learning Activities > Classes.

2. Select Add New link. This opens the Add New Class window.

3. In the Summary Information section: Ensure Item is selected under Type.

4. Choose Department of Veteran Affairs under the Item Type dropdown.

5. Select the Item ID magnifying glass icon to search for the item to schedule (Item ID=3730266).


7. Select the item from your search results.

8. Specify a security domain (TRAIN) for the class.

9. Enter a description for this class.

10. Select the Publish in all associated libraries checkbox. Once saved, the system automatically adds this new class to every library that the item already belongs to. This makes the class visible and possibly available for users to self-register.

11. In the Class Information section: Select a start date, start time, and time zone. The scheduled start date and time and the scheduled end date and time (calculated via item time slots) will appear below the class information. The start date and start time must be in the future.

12. Select Preview to view the basic information for the class (Optional).

13. In the Resources section: Select the drop-down menu next to the plus sign by Facility.

14. If applicable, select resources associated with the class: location, instructor, and equipment.

Notes:_______________________________________________________________________________
_____________________________________________________________________________________
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_____________________________________________________________________________________
Note: Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.

Note: The Resource Usage View drop-down window will allow the Admin to review the Resource allocation by Primary Location, Primary Instructor, or Equipment, which can aid in determining if there are resource conflicts.

15. In the Registration Form Custom Fields section, if you need to add the custom field for “Will you be utilizing Government reimbursed travel?” select the green and white plus sign and select the Search button, initiating a generic search.

16. Select the checkbox for Add.

17. Select the Add button at the top or bottom of the screen.

18. When you are finished, select Save.

19. If there are any warnings, the Warning Details screen displays. If this occurs, select Yes to continue.

20. The class record displays, allowing you to make further configurations.

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, Related

Copy a Class

It can take a long time to set up classes one by one. Copying allows you to duplicate classes and assign resources to one or more future dates.

Sometimes items are scheduled to be delivered multiple times. After the original class is created, the copy feature allows you to create duplicates, complete with associated resources and registration parameters. These copies of the original class can be scheduled to occur once or repeat according to specific scheduling rules. These rules include copying multiple times every “x” number of days, weeks, or months, and can be configured to end after a certain number of classes have been created or after a certain date.

Note: Keep in mind, if you want the changes to take effect across all classes, make the changes in the class record first, then copy your class.
### Table 3. Fields for Copying Options

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Start Date</td>
<td>Can be before or after the start date of the existing class. If you create multiple classes, then the system uses this date as the start date of the additional class that it creates and then adds the appropriate number and period (i.e., day, week, month) for each successive class that it creates.</td>
</tr>
<tr>
<td>Schedule On</td>
<td>Identifies the days of the week that the system can be used to create classes and their time slots.</td>
</tr>
<tr>
<td>Override Adjusted Registration close Date</td>
<td>Adjusts cut-off date from the existing class. That is, the system calculates the difference between the registration close date and the start date of the first time slot of the existing class. The system enables other controls that allow you to specify a new registration close date, time, and time zone.</td>
</tr>
<tr>
<td>Scheduled Every</td>
<td>Sets the number of time periods to skip between the starting date of each successive class that the system creates.</td>
</tr>
<tr>
<td>End after (schedules)</td>
<td>Uses the value that you provide to determine how many classes to create.</td>
</tr>
<tr>
<td>End after (date)</td>
<td>Uses the date that you provide to determine how many classes to create. Based on the other values that you provide, the system creates a class if the start date for a new class is on or before the date that you provide.</td>
</tr>
<tr>
<td>Include Registration Close Date</td>
<td>Copies an adjusted cut-off date from the existing class. That is, the system calculates the difference between the registration cut-off date and the start date of the first time slot of the existing class. If you clear the Include Registration Close Date checkbox, then the system clears the values in the Registration Close Date and Registration Close Time boxes for each new class that it creates.</td>
</tr>
<tr>
<td>Include Withdraw End Date</td>
<td>Copies an adjusted withdraw cut-off date for the existing class. That is, the system calculates the difference between the withdraw end date and the start date of the first time slot of the existing class.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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<tbody>
<tr>
<td></td>
<td>If you clear the <strong>Include Withdraw End Date checkbox</strong>, then the system clears the values in the <strong>Last Date to Withdraw</strong> and <strong>Withdraw End Time</strong> boxes for each new class that it creates.</td>
</tr>
<tr>
<td>Use the date as the driver to schedule</td>
<td>Starts every new class on the same day of the month that you identified in the <strong>New Start Date</strong> box</td>
</tr>
<tr>
<td>Use the day and week as the driver to schedule</td>
<td>Starts every new class on the same week of the month and day of the week that you identified in the <strong>New Start Date</strong> box.</td>
</tr>
</tbody>
</table>

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Demonstration: Copying and Canceling Classes

Now, the instructor will demonstrate how to copy and cancel classes.
**Demonstration: Copying and Canceling Classes**

**Copying a Class**

1. Use the class that you created in Activity #1. **Note:** You can access the record from your Recents or by searching for the Class ID (Learning Activities > Classes).

2. Once you’re in the class record, select the **Copy** option in the Actions area.

Options are available to **Copy Class Group**, **Copy New Class to the library**, **Copy Related Documents Link**, **Use item default time slot numbers**, and **Copy to consecutive Days**.

Additionally, there are options for **Copy Single**, **Copy Multiple – Daily Based**, **Copy Multiple – Weekly Based**, and **Copy Multiple – Monthly Based**.

3. Select the **Copy Multiple – Monthly Based** radio button.

4. Enter a New Start Date (use the next possible date) in the **New Start Date** textbox.

5. Enter “1” in the Schedule every ___ month(s) field.

6. Ensure the **End after ___ schedules** radio button is selected.

7. Enter “3” in this field.

8. Ensure the **Include Registration Close Date** checkbox is selected.

9. Ensure the **Include Withdraw End Date** checkbox is selected.

10. Select **Next**.

11. On the confirmation screen, uncheck the **Send Notification to Instructor** checkbox.

**Note:** This should only be unchecked in the Train environment. In the Live environment, the notification should be sent.

12. Select **Copy**. Note the new class IDs and start dates for the next exercise in case you navigate away from the page.

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**Notes:**

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Canceling a Class

1. From the Class was copied successfully page, select one of the new class ID hyperlinks.

2. Select the Cancel option from the Actions area of the Class record.

Note: The default information may or may not be the class to be canceled. Adjust as needed.

3. Select Next.

4. Admins are not required to enter a value for the Class Total, so you may immediately select Next again.

5. Select Inactivate the Class.

Note: Admins would also select additional options for notifications, and Add enrolled, waitlisted, and pending Users to the request for this item, as needed.

6. Select Next again.

7. On the Confirmation screen, select Finish.

8. On the Finished Confirmation Page, select OK.

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Activity #2: Copy and Cancel Classes

Now you will have an opportunity to practice copying and canceling classes in the 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: Copy and Cancel Classes

Copying a Class

1. Use the class that you created in Activity #1. **Note:** You can access the record from your Recents or by searching for the Class ID (Learning Activities > Classes).

2. Once you’re in the class record, select the Copy option in the Actions area.

3. Check the Copy New Class to the library, Copy Related Document Links, Use Item default time slot day numbers, and Copy to consecutive Days checkboxes.

4. Select the Copy Multiple – Monthly Based radio button.

5. Enter a New Start Date (use the next possible date) in the New Start Date textbox.

6. Enter “1” in the Schedule every ___ month(s) field.

7. Ensure the End after ___ schedules radio button is selected.

8. Enter “3” in this field.

9. Ensure the Include Registration Close Date checkbox is selected.

10. Ensure the Include Withdraw End Date checkbox is selected.

11. Select Next.

12. On the confirmation screen, uncheck the Send Notification to Instructor checkbox.

**Note:** This should only be unchecked in the Train environment. In the Live environment, the notification should be sent.

13. Select Copy. Note the new class IDs and start dates for the next exercise in case you navigate away from the page.

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TMS Talent Management System

Human Resources & Administration
Canceling a Class

1. From the **Class was copied successfully** page, select one of the new class ID hyperlinks.

2. Select **Cancel** option from the Actions area of the Class record.

**Note:** The default information may or may not be the class to be canceled. Adjust as needed.

3. Select **Next**.

4. Admins are not required to enter a value for the Class Total, and so you may immediately select **Next** again.

5. Select **Inactivate the Class**.

**Note:** Admins would also select additional options for notifications, and Add enrolled, waitlisted, and pending Users to the request for this item, as needed.

6. Select **Next** again.

7. On the Confirmation screen, select **Finish**.

8. On the Finished Confirmation Page, select **OK**.

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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.

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2.3 Lesson 2: Time Slots

Lesson 2: Time Slots

Once you create a class, you may need to update the date/time and change resource allocation.

This information is managed under the Agenda tab from the Related area of the class record.

Lesson 2 Objectives

After completing this lesson, you will be able to:
- Modify time slots of a class
- Assign resources to time slots

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**Time Slots**

- A time slot is a block of time within a class primarily used for resource allocation.
- If a user is registered in a class, they are registered in all time slots.
- Time slots contain any applicable resources, such as locations, equipment, and instructors.

---

**Resources Assigned to Time Slots**

- A time slot can have multiple resources of the same type, such as two instructors.
- Once a resource is assigned to a time slot, it is booked.
- If another admin attempts to schedule the resource during the same timeframe, VA TMS will alert them that there is a conflict.

---

**Notes:**

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**Time Slots**

A time slot is a block of time within a class primarily used for resource allocation. If a user is registered in a class, that user is registered in all time slots. Time Slots contain any applicable resources such as locations, equipment, instructors, etc., needed for the specified timeframe. Resource assignment to a time slot is optional, but each class must have at least one time slot.

When a class is added to the VA TMS, it is created using the default time slot structure from the Agenda Template tab of the item record’s Related area.

**Resources Assigned to Time Slots**

A time slot can have multiple resources of the same type, such as two (2) instructors. Once a resource is assigned to a time slot, it is “booked,” and if another admin attempts to schedule the resource during the same timeframe, the VA TMS alerts them that there is a conflict. You can view the conflict and take the appropriate steps to free up that resource or find an alternative.

To assign a resource to a time slot, the resource record must already exist in the VA TMS database.
Adding Resources to a Time Slot

You can set up class resources in the VA TMS. Resources include:
- Locations
- Instructors
- Equipment
- Custom Resources

Adding Resources to a Time Slot

The VA TMS provides the ability to schedule resources for the specific time slots (times) in which they are needed instead of scheduling them for an entire class. When multiple resources of a single type are associated with the time slot, admins can identify the primary resource for each time slot.

The Add Resources button enables you to assign locations, instructors, equipment, and custom resources to a time slot.

Custom Resources Search Defaults

- Searches on custom resources will default to the assigned custom resource types on the Edit Time Slot of the Class page.
- If a custom resource is not associated with the facility or location, all records will show unless there are domain restrictions that apply.

Custom Resources Search Default

Searches on custom resources will default to the assigned custom resource types on the Edit Time Slot section of the Class page.

For a search, if a custom resource is not associated with the facility or location, all records will show unless there are domain restrictions that apply.

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Demonstration: Time Slots

Now, the instructor will demonstrate the time slots function in VA TMS.
**Demonstration: Time Slots**

1. Navigate to the **Learning Activities > Classes**.
2. Search for and select for the **class** you created previously. You can also find the class listed in your **Recents**.
3. With the class record displayed, let’s discuss the **Agenda** tab.

**Assigning Locations**
When the training location has been identified, you can assign it to the time slot(s) within a class.

1. Select the **Agenda** tab in the Related Area.
2. Next, select the **More** icon next to an existing time slot.
3. Choose the **Edit Time Slot** option.
4. Within the **Edit Time Slot** window, select the **Resources** dropdown menu.
5. Choose **Add Location**.
6. The VA TMS returns all locations in the search results. Select the **checkbox(es)** next to the desired location.
7. Select **Add**.

**Assigning Instructors**
Once the instructor is identified, he or she can be assigned to the time slot(s) within a class.

1. Within the **Edit Time Slot** window, select the **Add Instructor** option under the Resources dropdown menu. The VA TMS returns all instructors in the search results. The search results include a column that displays the resource availability, which can help when determining the segment resource allocation:

**Notes:**
• Not Available
• Available for entire class
• Available for current time slot
• Blank (when time slot information is not available)

**NOTE:** The search for authorized instructors is an option per Item—so it’s not necessary to clear out the item information from the filter if you want to search for an instructor who is not specifically authorized to teach this item. To perform “search and select” search filters, select the **Search** tab, enter your search criteria, then select **Search**.

2. Select the **checkbox(es)** next to the desired instructors.

3. Select **Add**.

**Assigning Locations**

When the training location has been identified, you can assign it to the time slot(s) within a class.

1. Within the **Edit Time Slot** window, select the **Resources** dropdown menu.

2. Choose **Add Location**.

3. The VA TMS returns all locations in the search results. Select the **checkbox(es)** next to the desired location.

4. Select **Add**.

**Assigning Equipment**

Equipment is any reusable resource that is used in the delivery of classes. These include overhead projectors, television monitors, classroom laptops, etc. Equipment can be associated with locations and facilities. You may schedule equipment that does not come with the location that has been scheduled.

1. Within the **Edit Time Slot** window, select the **Resources** dropdown menu.

2. Choose **Add Equipment**.

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3. The VA TMS returns a list of available equipment. Select the **checkbox(es)** next to the desired equipment.

4. Select **Add**.

If **Custom Resources** exist for the class, you can select these the same way after accessing the list from the Resource dropdown menu.

**Resource Conflicts**

If you select a resource that is already scheduled for the same time in which you are trying to schedule it, a warning message displays. You can view the conflict and decide to continue and schedule that resource or search for and select another. **Instructor Note:** You may need to “force” a conflict to show users how this feature works.

**Apply to All Time Slots**

In **Edit Time Slot**, Admins can add all resources that will be needed to deliver the time slot. You can also select **Apply to All Time Slots** to copy the resources that you have applied to the time slot that you’re modifying to all other time slots of the class. Once you make your selections to copy, select **Save**.

**Additional Segments**

Once a class is created, Admins can add or remove time slots from that class. The default time slot structure is established through the Agenda tab of the item record. You can add a new time slot to the class by either selecting the **Create Group** button or by selecting a listed time slot and choosing the **Copy** icon. The Copy Daily Time Slots window will appear and allow you to choose the number of copies to make. The TMS will schedule the times and dates accordingly.

**Note:** If the location chosen does not allow for weekends, the TMS will not schedule class times during this timeframe. You can edit each time slot by selecting the more button and then Edit Time Slot.

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Activity #3: Time Slots

Now you will have an opportunity to practice working with an agenda and time slots in the 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: Time Slots

Assigning Resources to Time Slots

1. Navigate to Learning Activities > Classes.

2. Enter search criteria and select the class hyperlink for the class created in Activity #1. It can also be accessed via Recents.

Note: If you have not navigated away from the class from the previous activity, you do not need to search for it.

3. Select the Agenda tab from the Related area.

4. Select the More icon (…) next to the existing time slot.

5. Select Edit Time Slot.

Adding Locations

1. The default option listed in the Resources dropdown should be Add Location. Select Add Location.

2. Select the corresponding checkbox to select the location to add for the time slot.

3. Select Add.

4. Select Add Location, once again.

5. Select the corresponding checkbox next to any location that was not chosen in step 7.

6. Select Add.

7. The primary location can be selected by choosing the Primary radio button next to one of the locations.

8. Choose the checkbox next to the non-primary location.

9. Select Save. Note: Steps 8 and 9 are how any resource can be removed.

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Adding Instructors

1. Select the More icon (…) next to the existing time slot.

2. Select Edit Time Slot.

3. In the Resources dropdown menu, select Add Instructor.

4. Select the corresponding checkbox to select an instructor to add for the time slot.

Note: When adding an instructor, the VA TMS returns only instructors who are authorized to teach this item.

5. Select Add.

6. Select Add Instructor, once again.

7. Select the corresponding checkbox next to any instructor that was not chosen in step 4.

8. Select Add.

9. The primary location can be selected by choosing the Primary radio button next to one of the instructors.

10. Select Save.

Adding Time Slots to an Agenda

1. Select the Create Group icon.

2. (Optional but recommended) Enter a Description.

3. Enter a Start Date, Start Time, End Date, and End Time. If you need to change the Time Zone, select the correct Time Zone.

Note: If the times you chose are already part of a time slot, the TMS will not allow you to save your new time slot. The date and time fields will be outlined in red to indicate the error.

4. Select Save.

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Copy Time Slots

1. Next to the time slot just created, select the Copy icon.

2. Enter the number of times to copy the time slot.

3. Select Copy.

4. View the new time slot(s).

**Note:** The resources assigned to the original time slot are carried over to the new time slot(s).
How can you view time slots within a class?

- a) Select the Document Links tab
- b) Select the Materials tab
- c) Select the Agenda tab
- d) Select the Details tab

---

Knowledge Check

Answer the following question using the chat feature:

How can you view time slots within a class?

- a) Select the Document Links tab
- b) Select the Materials tab
- c) Select the Agenda tab
- d) Select the Details tab

---

Which of the following are resources that can be assigned to a time slot?

- a) Instructors
- b) Equipment
- c) Locations
- d) All of the Above

---

Knowledge Check

Answer the following question using the chat feature:

Which of the following are resources that can be assigned to a time slot?

- a) Instructors
- b) Equipment
- c) Locations
- d) All of the Above

---

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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.
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 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.

**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 security 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.

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Activity #4: Working with Cohorts

Now you will have an opportunity to create and edit a cohort 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: Working with Cohorts

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 security 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.

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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.

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Job Aid: Available on the TMS Resource site.

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Notes:

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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
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: Registration

Lesson 4: Registration

Say: Now that the class is configured, you can register users. In this lesson, you will learn the registration process to register users for classes.

Lesson 4 Objectives

After completing this lesson, you will be able to:

- Search for users based on learning needs
- Find the Item Requests report
- Define the four registration statuses
- Register users for a class
- Control manager rights to enroll users
- Enable autofill, waitlist, and set class size
- Reserve seats for a class
- Use the Registration Assistant tool
- Record attendance for a specific time slot
User Search Selector

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
Item Requests Report

Admins can also run an Item Requests report which will generate a report, for users and items, that lists existing user requests.

How Users Register

- User self-register
- Manager registers direct reports
- Admin registers users

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.
**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 **AutoFill Registration** is checked, 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 waiting for 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 a class within the Train Security Domain. In the search results, select the Class ID for the desired class. You can also access the class record created earlier in the Recents menu.

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:** 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 #5: Registration

Now you will have an opportunity to practice using the registration feature 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: Registration**

1. Navigate to **Learning Activities > Classes**.
2. Enter search criteria to search for a class within the **Train Security Domain**. 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**.
6. Select **Search**.
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.
Slide 63: Knowledge Check

**Knowledge Check**

Answer the following question using the chat feature.

The four registration statuses are enrolled, waitlisted, canceled, and ____________.

---

**Control Manager Rights to Enroll Users**

- A single setting called “Self Registration” on the Item and Class records controls users’ rights to self-register.
- There is also a “Manager Registration” setting in the Item Record’s Detail tab information:
  - If Manager can Register Others is set to **active**, then the manager can register users for training. If set to **No**, then the manager cannot register users.
  - This feature defaults to **active** on all new items.

---

**Control Manager Rights to Enroll Users**

A single setting called “Self Registration” on the Item and Class record controls users’ rights to self-register.

There is also a “Manager Registration” setting in the Item Record’s Detail tab information:

- If Manager can Register Others is set as **active**, then the manager can register users for training. If set to **No**, then the manager cannot register users.
- This feature defaults to **active** on all new items.

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Notes:

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Auto Fill, Waitlist, and Set Class Size

**Setting Auto Enroll from Waitlist** allows users who have been waitlisted for a class to be automatically registered.

**Users can Waitlist** allows users to be added to a waiting list for an item or class.

**Setting Minimum Enrollments** sets class size and allows consistent use of resources.

**Setting Maximum Enrollments** sets class size and assures that proper assets for the classroom size are not exceeded.

**Demonstration: Enrollment Settings**

Now, the instructor will show you optional enrollment settings within a class.
Demonstration: Enrollment Settings

1. If you have navigated away from your class record, select Learning > Classes. Enter search criteria to search for the class you’ve been using throughout the session. You can also find the record in your Recents.

2. Ensure the Details tab is selected in the Related Area.

3. Display the following options in the General area:
   - **Description**
   - **Contact Name, Email Address, Phone, and Fax:** Allows Admin to set contact information for users taking each class
   - **Registration Close Date:** Allows Admin to set a final day for registration
   - **Registration Close Time:** Allows Admin to set a final registration time

4. Display the Email Confirmation for Admin-Initiated Actions section.

5. Use your mouse or keyboard to scroll down to the Registration Settings section.

6. Enter a number for Minimum Enrollments (ex. 10).

7. Enter a number for Maximum Enrollments (ex. 30).

8. Ensure User can Self-Register is set to Yes.

9. Ensure Manager can Register Others is set to Yes.

10. Ensure User can Waitlist is set to Yes.

11. Select Yes under Auto Enroll from Waitlist. This allows the TMS to auto-enroll users from the waitlist as seats open in a class.

12. Select Save.

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Activity #6: Enrollment Settings

Now you will have an opportunity to practice setting enrollment options 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: Enrollment Settings

1. If you have navigated away from your class record, select Learning > Classes. Enter search criteria to search for the class you’ve been using throughout the session. You can also find the record in your Recents.

2. Ensure the Details tab is selected in the Related Area.

3. Use your mouse or keyboard to scroll down to the Registration Settings section.

4. Enter a number for Minimum Enrollments (ex. 10).

5. Enter a number for Maximum Enrollments (ex. 30).

6. Ensure User can Self-Register is set to Yes.

7. Ensure Manager can Register Others is set to Yes.

8. Ensure User can Waitlist is set to Yes.

9. Select Yes under Auto Enroll from Waitlist.

10. Select Save.

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Knowledge Check

All the registration options for a class are determined from within the Registrations tab.

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.

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.

As reserved seats are reserved, the number of open seats decreases by that number.
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, select the **Organization** radio button.

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.
Activity #7: Reserved Seats

Now you will have an opportunity to practice reserving seats in the VA TMS. 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: 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, select the **Organization** radio button.

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**.
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

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.

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Demonstration: Manage Registration

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

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 a class using a Security Domain search. (TRAIN).

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.

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The process status now confirms you are finished and will note: “All registrations in this class were successful.”
Activity #8: Manage Registration

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

Please complete the steps for Activity #8 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.
Activity #8: 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.


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.

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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
**Time Slots: Mark Attendance**

To record a user’s attendance, select the Agenda tab. Next to any time slot of the class record, select the More (…) icon. Choose Mark Attendance.

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

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**Time Slots: Record Attendance (cont’d)**

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.
Related Reports

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

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

**Class Data**: The Class Data report returns detailed information about each class, including the item scheduled, dates scheduled, registration and waitlist data, instructor data, time slot data, and delivery costs.

**Learning Calendar**: The Learning Calendar report returns all daily learning events scheduled within a specified date range.

**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.

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: Using Direct Links for Classes

Lesson 5: Direct Links for Classes

In this last lesson, you’ll learn how direct links are created. You’ll also learn the benefits of using direct links to encourage item completions.

Lesson 5 Objectives

State: After completing this lesson, you will be able to:
- Create a direct link for a class
- Send direct links to users

Notes:
Slide 83: Deeplink Overview

Direct Link Overview

A direct link is a location address hyperlink, which is often referred to as a web address or URL. In its most basic form, a direct link is a way to directly access a piece of web content or a registration page rather than the website’s home page.

Direct links are customized and created within the TMS and can then be shared with users. The purpose of a direct link is to ultimately make it easier for users to access their training content.

Demonstration: Creating a Direct Link for a Class

Now the instructor will demonstrate how to create and then send a direct link for a class in the VA TMS.

Slide 84: Demonstration: Creating a Direct Link for a Class

Notes:

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Demonstration: Creating a Direct Link for a Class

1. Navigate to System Administration > System Management Tools > Generate Direct Link.

2. Select Class Details from the Direct Link Type dropdown menu.

3. Leave Link Output Format and Learning Only Users as defaulted.

4. Use the Magnifying Glass icon to search for a class ID. You can find the class ID created earlier listed in your Recents.

5. In the listing class search results, choose the Select link next to the desired class.

6. Select Display Link.

7. The custom link displays. Select the entire link path. Copy the direct link, paste it into an email or another form of communication, and send it to the user(s).
Activity #9: Creating a Direct Link for a Class

Now you will have an opportunity to practice creating and sending a Direct Link for a class in the VA TMS.

Please complete the steps for Activity #9 on the following page.

If you have any questions during the activity, you may ask them using the Chat feature.
**Activity #9: Creating a Direct Link for a Class**

1. Navigate to **System Administration > System Management Tools > Generate Direct Link.**

2. Select **Class Details** from the Direct Link Type dropdown menu.

3. Leave **Link Output Format** and **Learning Only Users** as defaulted.

4. Use the **Magnifying Glass** icon to search for a class ID. You can find the class ID created earlier listed in your Recents.

5. In the listing class search results, choose the **Select** link next to the desired class.

6. Select **Display Link.**

7. The custom link displays. Select the entire link path. Copy the direct link, paste it into an email or another form of communication, and send it to the user(s).

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Notes:

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Knowledge Check

Answer the following question using the chat feature:
Which of these statements are true regarding direct links? Choose all answers that apply.

a) Direct links are customized within VA TMS.
b) Direct links can be shared with users via email.
c) The ultimate purpose of a direct link is to make it easier for users to access their linked content.
d) Direct links can only be created for classes.

Questions?

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

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

- Create and edit classes
- Work with time slots
- Create and edit cohorts
- Register and unregister users for classes
- Utilize Direct Links

Questions?

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

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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: VATMSPoP@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.