



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 1: Participant Guide Icons

| Icons | Description |
|---|---|
|  | This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS TRAIN environment. |
|  | This icon indicates that participants will complete an activity in VA TMS TRAIN environment. |
|  | This icon indicates that there is a job aid available for the task. |

1.5 Participant Preparation and Guidelines

Participants must complete the following for this training:

- Register for training through the VA TMS.
- 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

| Lessons | Estimated Time |
|------------------------------------|-----------------------|
| Welcome and Introduction | 10 minutes |
| Lesson 1: Classes | 45 minutes |
| Lesson 2: Time Slots | 30 minutes |
| Lesson 3: Cohorts | 30 minutes |
| Lesson 4: Registration | 25 minutes |
| Lesson 5: Direct Links for Classes | 20 minutes |

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.



Slide 1: System Login

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



Slide 2: VA TMS 2.0 Training for Registration Managers

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

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



Slide 2: Participant Introductions

PARTICIPANT GUIDE

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



Slide 4: Participant Guide

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

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



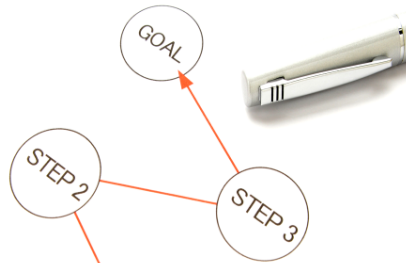
Slide 5: Logistics

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 administrator functions of the VA TMS specific to the Scheduling Manager role.



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.

Slide 6: Course Goals

A graphic for the 'TRAINING METHODS' slide. On the left, there is a desk setup with a laptop, a coffee cup, a keyboard, a pair of glasses, a smartphone, and a small clock. On the right, the title 'TRAINING METHODS' is displayed above a bulleted list.

TRAINING METHODS

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

Slide 7: Training Methods


Training Methods

Although there will be session-specific variations, each VILT session will include the following training methods:

- **Content presentations:** Content presentation refers to the delivery of the training to best facilitate 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

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



Slide 8: Session Agenda

Session Agenda

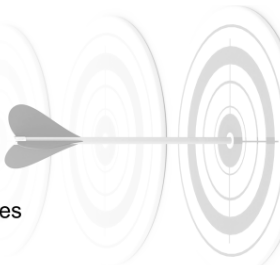
Today's session is organized into the following lessons:

- 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

After completing this session, you will be able to:

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



Slide 9: Session Objectives

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?




Slide 10: Questions?

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 1. Scheduling Terminology

| Term | Definition |
|----------------|---|
| Classes | An instance of an item added to a calendar where resources can be added to it. Users can also enroll in the class. |
| Cohorts | Users who are tracked as a group and perhaps complete a series of scheduled training requirements. |
| Equipment | Reusable training objects (e.g., VCR, TV, video cameras, or LCD). |
| Facility | Building where training takes place (e.g., Headquarters). |
| Instructor | Person who will instruct or facilitate a specific portion of the class. |
| Location | Space or room within a facility (e.g., a classroom, computer lab). |
| Materials | Consumable training objects (e.g., notepads, markers, or specific training guides). |
| Reserved Seats | Seats in a class that are reserved for non-specific members of a given organization. |
| Resources | One or more assets that are assigned and reserved to a time slot within a class (e.g., an instructor, facility, equipment). |
| Time Slots | Unit of time within a class. A class must have at least one time slot. They are used primarily for resource management. |

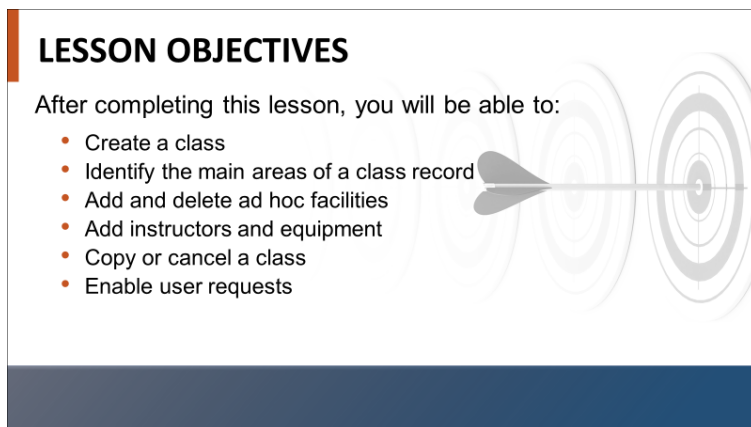
2.2 Lesson 1: Classes



Slide 11: 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.



Slide 12: Lesson 1: Objectives

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: _____

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.

Slide 13: Scheduling Management

Notes: _____

Classes

Classes are scheduled items used to manage resources, user registration, and course duration.

- Places an instance of the item on the calendar
- Allows resources to be associated to it
- Allows users to be registered into it

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.

Slide 14: Classes

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.

Slide 15: Adding a New Class

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 to track user registration.

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.

Notes: _____

Ways to Add a New Class

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

Slide 16: Ways to Add a New Class

Ways to Add a New Class

You can add classes from two different areas

1. Navigate to Learning Activities > Classes and Select the Add New link.
2. Item record (Select the Schedule link 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

Slide 17: Ad Hoc Facilities

Ad Hoc Facilities

The Add New Class page has a feature where admins can enter information for ad hoc facilities.

Ad hoc means the facility may not be normally designated for training or meetings.

Notes: _____

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

Slide 18: Ad Hoc Facilities (Cont'd)

Ad Hoc Facilities (Cont'd)

Admins can assign an ad hoc facility when requesting a class for those offerings scheduled to take place at a facility that is not normally used for training (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 the ad hoc facility by selecting the link and then selecting **Delete**

Slide 19: Delete Ad Hoc Facility

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**.

Notes: _____

Add or Select Location, Instructor, & Equipment

- Select a location, instructor, and/or equipment
- Or, select the green circle plus sign to add a new location, instructor, and/or equipment

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.

Slide 20: Add or Select Location, Instructor, and Equipment

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

Custom Fields

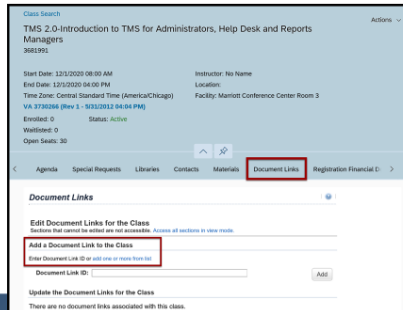
Adding a custom field allows the admin to determine if the user will be selecting "Will you be utilizing Government reimbursed travel?" to the class.

Slide 21: Custom Fields

Notes: _____

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



Slide 22: Document Attachment to Classes

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

Slide 23: User View – Preferred Region and Facility

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: _____

User View: Preferred Region

Users can request regions and facilities

TMS 2.0-Introduction to TMS for Administrators, Help Desk and Reports Managers
VA 1730266
Item Description: Learn necessary foundation skills needed to work in TMS: navigation, searching, running reports, and key terms such as item, curricula, etc. * Required knowledge needed for ALL other TMS Admin training.

> CURRENT REGISTRATION

> DATES AND TIMES

> REQUEST A CLASS

Need By Date: MM/DD/YYYY

Preferred Region:

Preferred Location:

Comments:

Request

Slide 24: Preferred Region and Facility

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 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 class.

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

Slide 25: Filter Request

Notes: _____

Class Record Main Areas

Slide 26: Class Record Main Areas

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

Slide 27: Class Settings

Class Settings

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

Notes: _____

Table 2. Class Record Summary

| Field | Description | Displays to User |
|-----------------------------|---|-------------------------|
| Description | Information about the class for users, which allows for a second title. | Yes |
| Item Description | 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. | Yes |
| Class ID | Automatically generated ID number for the class. | Yes |
| Active | Checkbox used to indicate whether a Class is active and in the user libraries. | |
| Security Domain | Indicates administrator ownership of the class (e.g., OHRA, OFT). | Yes |
| Facility | Building where the class takes place. | Yes |
| Time Zone Displayed to User | Time zone of the class displayed to the user. | Yes |
| Approval Process | The type of approval process that is required to complete the registration. Self-registration must be checked before this feature is enabled. | |
| Approval Required | This checkbox enables the approval process entered in the Process ID field. | |
| Contact | Name of a contact person for the class (is included in the registration notification email). | Yes |
| Email | Email address of the contact person of the class (is included in the registration notification email). | Yes |

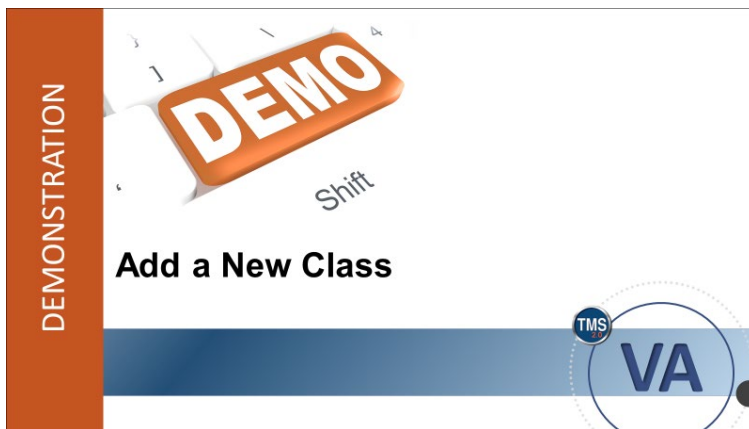
Notes: _____

| Field | Description | Displays to User |
|--|--|------------------|
| Phone | Phone number of the contact person of the class (is included in the registration notification email). | Yes |
| Fax | Fax number of the contact person of the class (is included in the registration notification email). | Yes |
| Auto Enroll from Waitlist | Default for classes so that users are automatically moved from the waitlist to registration time slots as they open, if waitlisting is enabled. | |
| Users can Waitlist | 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. | Yes |
| Comments | This field is for administrator informational purposes. | |
| Closed | The class is over, and user registration cannot be changed. | |
| Canceled | If canceled, user registration cannot be changed and sends cancellation notification. | |
| Registration Close Date/Time/Time Zone | Last date and time (in specified time zone) that a user can change his or her registration status (e.g., registers or withdraws). | Yes |
| User can Self-Register | 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. | Yes |
| Minimum Enrollment | Minimum number of users needed to hold the class. | |
| Maximum Enrollment | Maximum number of users who can register in the class. Use Users can Waitlist to place excess users on the waitlist. | Yes |

Notes: _____

| Field | Description | Displays to User |
|---------------------|---|------------------|
| Registration Status | Number of users registered and waitlisted, shown to user as “Capacity.” | Yes |
| Email Confirmations | TMS notifications to users, managers, instructors, and contact for registration as well a withdrawal. | |

Notes: _____



Slide 28: Demo: Add a New Class

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.

Notes: _____

***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).
6. Select **Search**.
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: _____

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: _____

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.

Notes: _____



Slide 29: Activity #1: Add a New Class

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.

Notes: _____

**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).
6. Select **Search**.
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: _____

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.

Notes: _____

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***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

Slide 30: Knowledge Check

Notes: _____

What are the main areas of a class record?



KNOWLEDGE CHECK

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

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

Slide 31: Knowledge Check

Copy a Class

- Allows you to create duplicates
- Copies resources and registration parameters
- Can be scheduled to occur once or in recurrence

Slide 32: Copy a Class

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.

Notes: _____

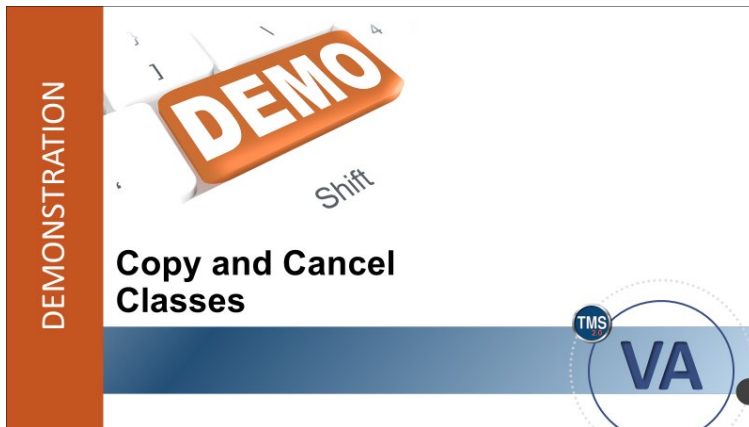
Table 3. Fields for Copying Options

| Field | Description |
|---|--|
| New Start Date | 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. |
| Schedule On | Identifies the days of the week that the system can be used to create classes and their time slots. |
| Override Adjusted Registration close Date | 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. |
| Scheduled Every | Sets the number of time periods to skip between the starting date of each successive class that the system creates. |
| End after (schedules) | Uses the value that you provide to determine how many classes to create. |
| End after (date) | 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. |
| Include Registration Close Date | 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. |
| Include Withdraw End Date | 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. |

Notes: _____

| Field | Description |
|--|---|
| | If you clear the Include Withdraw End Date checkbox , then the system clears the values in the Last Date to Withdraw and Withdraw End Time boxes for each new class that it creates. |
| Use the date as the driver to schedule | Starts every new class on the same day of the month that you identified in the New Start Date box |
| Use the day and week as the driver to schedule | Starts every new class on the same week of the month and day of the week that you identified in the New Start Date box. |

Notes: _____



Slide 33: Demonstration: Copy and Cancel Classes

Demonstration: Copying and Canceling Classes

Now, the instructor will demonstrate how to copy and cancel classes.

Notes: _____

***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.

Notes: _____

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.

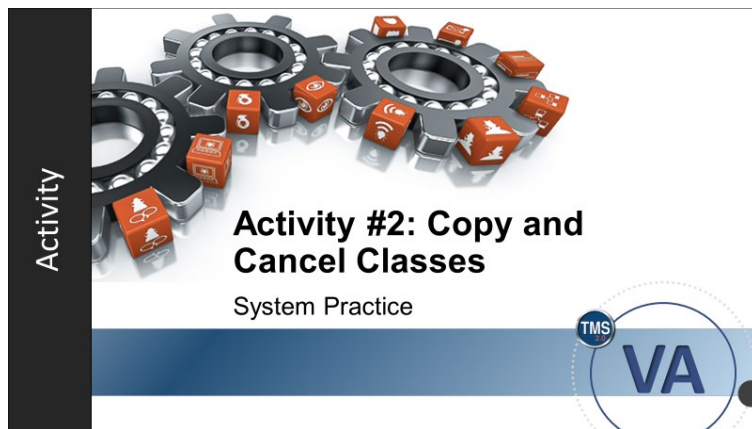
Note: The default information may or may not be the class to be canceled. Adjust as needed.

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**.

Notes: _____



Activity

Activity #2: Copy and Cancel Classes

System Practice

***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.

Slide 34: Activity #2: Copy and Cancel Classes

Notes: _____



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.

Notes: _____

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**.

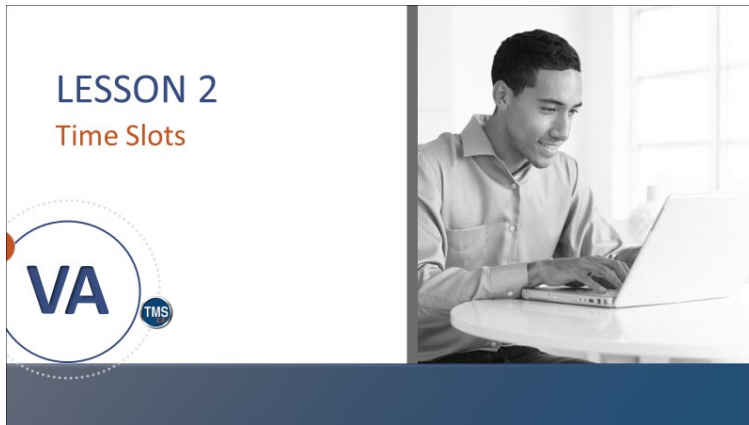
Notes: _____

QUESTIONS?**Slide 23: Questions?*****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.

Notes: _____

2.3 Lesson 2: Time Slots

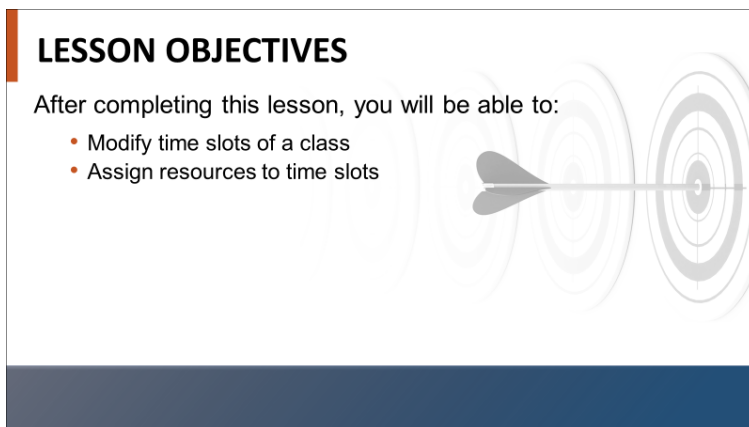


Slide 36: Lesson 2 Time Slots

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.



Slide 37: Lesson 2 Objectives

Lesson 2 Objectives

After completing this lesson, you will be able to:

- Modify time slots of a class
- Assign resources to time slots

Notes: _____

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, he/she is registered in all time slots
- Time slots contain any applicable resources, such as locations, equipment, and instructors

Slide 38: Time Slots

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 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 him/her that there is a conflict

Slide 39: Resources Assigned to Time Slots

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 him or her 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.

Notes: _____

Adding Resources to a Time Slot

You can set up class resources in the VA TMS.

Resources include:

- Locations
- Instructors
- Equipment
- Custom Resources

Slide 40: Adding 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

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.

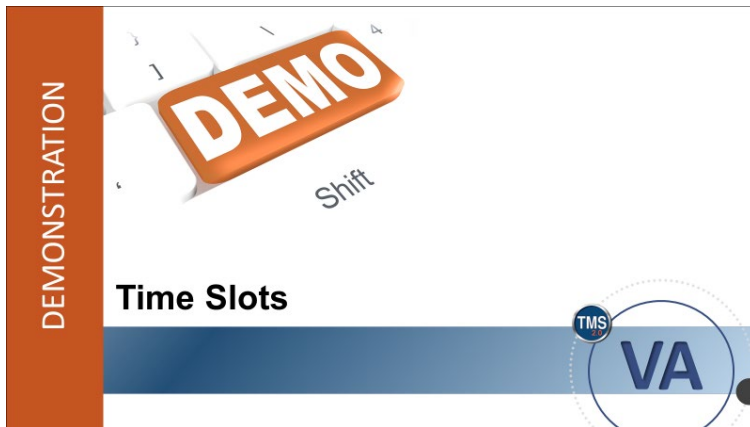
The **Add Resources** button enables you to assign locations, instructors, equipment, and custom resources to a time slot.

Custom Resources Search 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.

Notes: _____



Slide 42: Demonstration: Time Slots

Demonstration: Time Slots

Now, the instructor will demonstrate the time slots function in VA TMS.

Notes: _____

**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**.

Notes: _____

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.

Notes: _____



Slide 43: Activity #3: Time Slots

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.

Notes: _____



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.

Notes: _____

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**.

Notes: _____

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).

Notes: _____

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

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

Slide 44: Knowledge Check

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

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

Slide 45: Knowledge Check

Notes: _____



Slide 46: Questions?

Questions?

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

Notes: _____

2.4 Lesson 3: Cohorts**Slide 47: 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 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

Slide 48: Lesson Objectives***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

Notes: _____

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

Slide 49: Cohorts Defined

Cohorts Defined

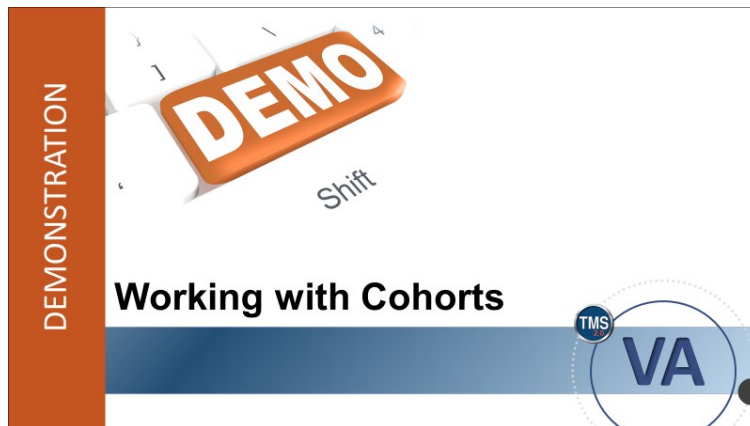
Cohorts are generally used as a grouping tool for users who go through a common set of classes. When you use a cohort, group reporting and group scheduling are easier for those who need to attend the same classes. A cohort is created to schedule all group members and to produce reports on their achievements.

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.



Slide 50: Working with Cohorts

Notes: _____

**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**.
4. Select the magnifying glass in the **Security Domain** field. Enter **Train** in the **Security Domain ID** field. Select **Search**. Select **TRAIN**.
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.
6. Leave **Max Size** blank.
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.

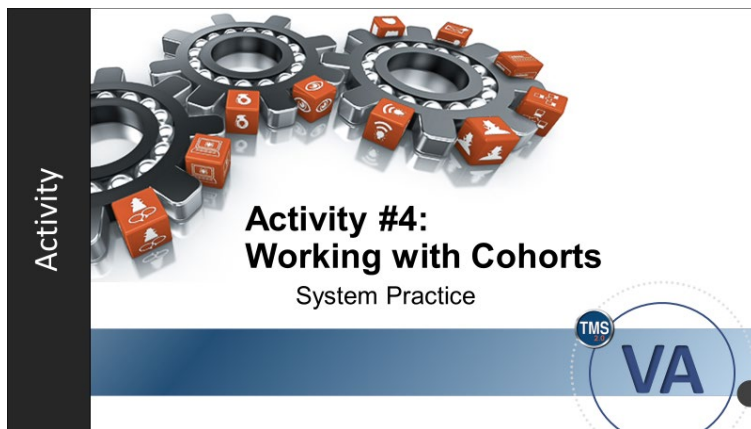
Notes: _____

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.

Notes: _____



Slide 51: Activity #4: Working with Cohorts

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.

Notes: _____



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**.
4. Select the magnifying glass in the **Security Domain** field. Enter **Train** in the **Security Domain ID** field. Select **Search**. Select **TRAIN**.
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.
6. Leave **Max Size** blank.
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.

Notes: _____

Creating cohorts is an automatic process.

- a) True
- b) False



KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature.

Creating cohorts is an automatic process.

- a) True
- b) False

Slide 52: Knowledge Check

Which of these items should be part of 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



KNOWLEDGE CHECK

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

Slide 53: Knowledge Check

Notes: _____



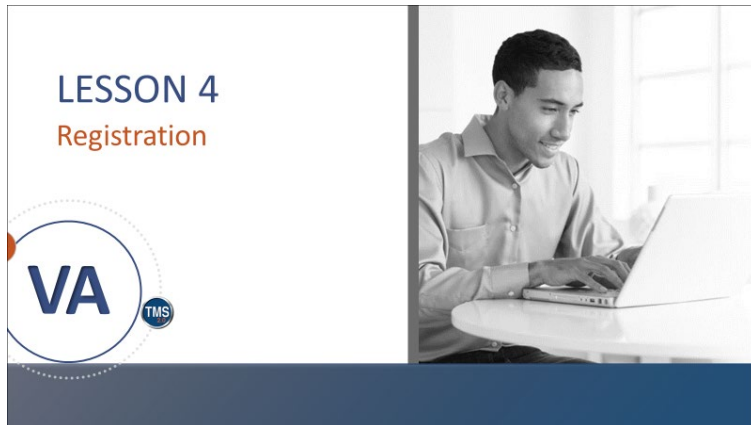
Slide 54: Questions?

Questions?

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

Notes: _____

2.5 Lesson 4: Registration



Slide 55: Lesson 4: Registration

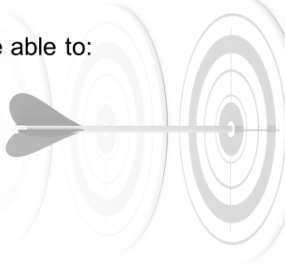
Lesson 4: Registration

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 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



Slide 56: Lesson 4 Objectives

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

Notes: _____

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

Slide 57: User Search Selector

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

Notes: _____

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.



Slide 58: Item Requests Report

How Users Register

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

Slide 59: How Users Register

Item Requests Report

Admins can also run an Item Requests report, which returns, for users and items, the users who have requested items but who have not yet been registered or waitlisted in a class of the item.

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.

Notes: _____

Registration Statuses

Enrolled:

- The user has a seat in the class

Waitlisted:

- The user is waiting for a seat to open

Canceled:

- The user no longer has a seat in the class

Pending:

- The user is waiting for approval in the VA TMS

Slide 60: Registration Statuses

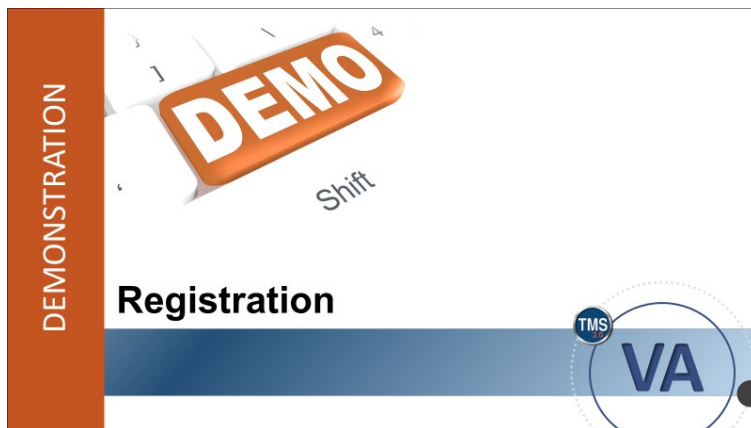
Registration Statuses

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.



Slide 61: Demonstration: Registration

Notes: _____

***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**.
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.

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.

Notes: _____



Slide 62: Activity #5: Registration

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.

Notes: _____

**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.

Notes: _____

Fill in the Blank:

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

KNOWLEDGE CHECK
Knowledge Check

Answer the following question using the chat feature.

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

Slide 63: Knowledge Check**Control Manager Rights to Enroll Users**

- A single setting called “Self Registration” on the Item and Class records control 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.

Slide 64: Control Manager Rights to Enroll Users**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.

Notes: _____

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/assures that proper assets for the classroom size are not exceeded

Slide 65: Auto Fill, Waitlist, and Set Class Size

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 (only available in a class record).

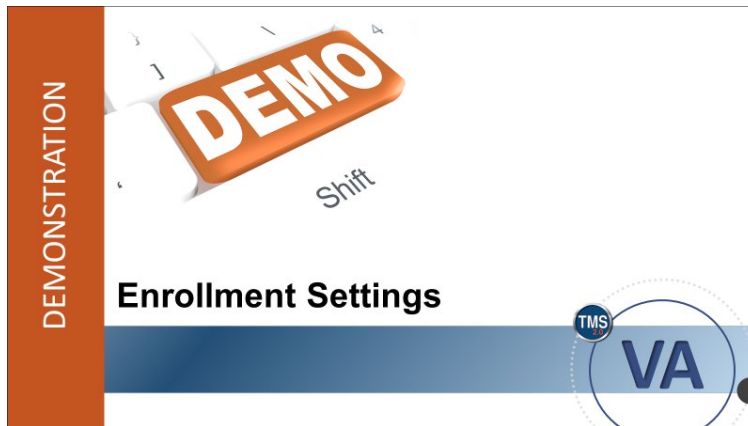
Users can Waitlist allows users to be added to a waiting list for an item or class.

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

Maximum Enrollment 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.



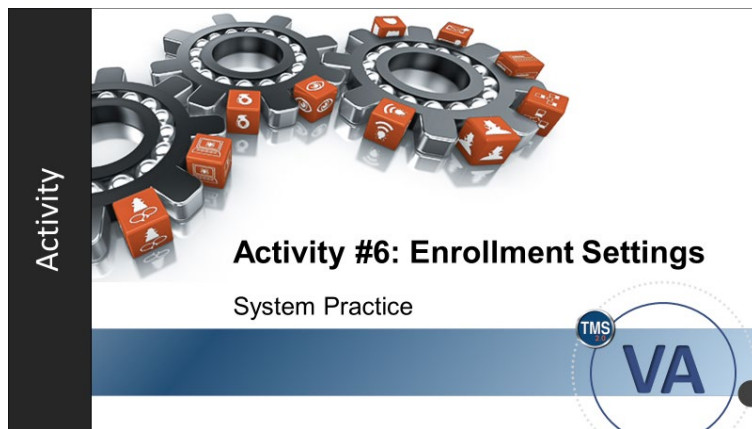
Slide 66: Demonstration: Enrollment Settings

Notes: _____

***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**.

Notes: _____



Slide 67: Activity #6: Enrollment Settings

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.

Notes: _____

**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**.

Notes: _____

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



- a) True
- b) False

KNOWLEDGE CHECK***Knowledge Check***

Answer the following question using the chat feature.

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

- a) True
- b) False

Slide 68: Knowledge Check

Notes: _____

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 69: Reserved Seats

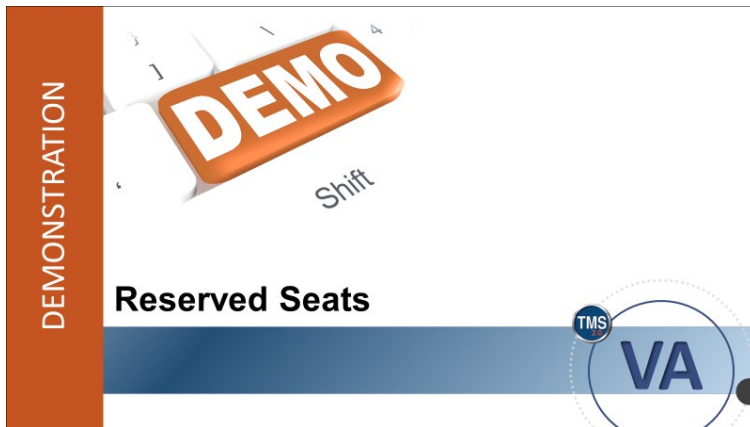
Reserved Seats

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.

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

Notes: _____



Slide 70: Demonstration: Reserved Seats

Demonstration: Reserved Seats

Now the instructor will demonstrate the reserved seats function in the VA TMS.

Notes: _____

***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.

Notes: _____



Slide 71: Activity #7: Reserved Seats

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.

Notes: _____

**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**.

Notes: _____

Reserved seats allows you to reserve spaces in a class without having to register specific users.



- a) True
- b) False

KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature:

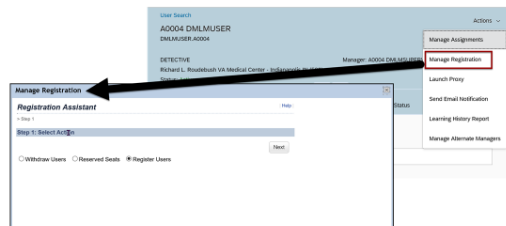
Reserved Seats allow you to reserve spaces in a class without having to register specific users.

- a) True
- b) False

Slide 72: Knowledge Check

Registration from User Record

The Manage Registration tool helps streamline the process of registering users from the admin side of the VA TMS.



Slide 73: Manage Registration Tool

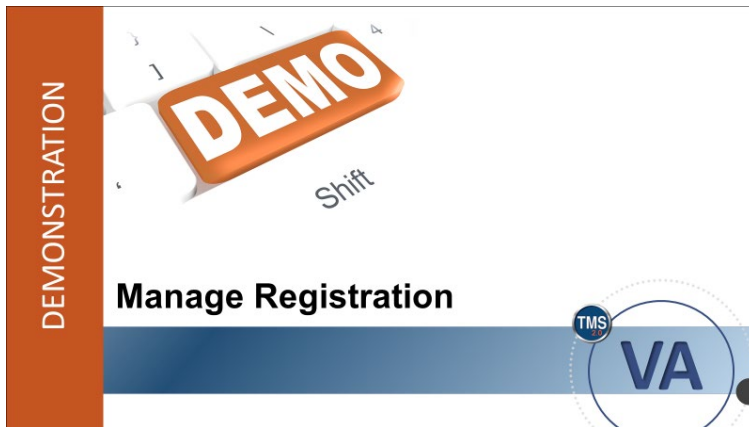
Manage Registration Tool

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.

Notes: _____



Slide 74: Demonstration: Manage Registration

Demonstration: Manage Registration

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

Notes: _____

***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.

Notes: _____

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

Notes: _____



Slide 75: Activity #8: Manage Registration

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.

Notes: _____

**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**.
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.

Notes: _____

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

Notes: _____

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

- a) True
- b) False

**KNOWLEDGE CHECK*****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.

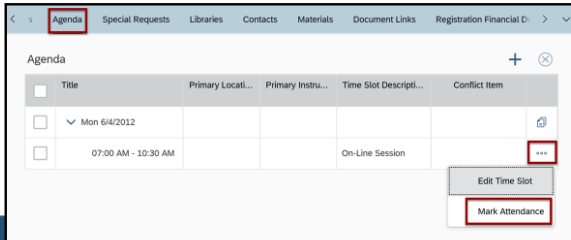
- a) True
- b) False

Slide 76: Knowledge Check

Notes: _____

Time Slots: Mark Attendance

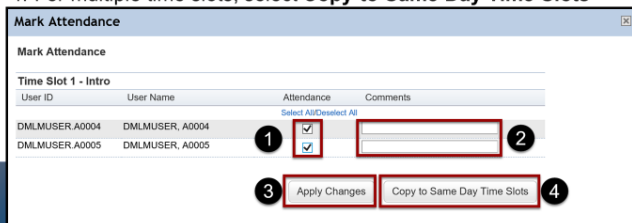
Select the **More > Mark Attendance** link next to any time slot



Slide 77: Time Slots: Mark Attendance

Time Slots: Mark Attendance (cont'd)

1. Select **Attendance** checkbox to record attendance
2. Enter **comments**, if desired
3. Select **Apply Changes**
4. For multiple time slots, select **Copy to Same Day Time Slots**



Slide 78: Time Slots: Mark Attendance (continued)

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.

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.

Notes: _____

Related Reports

The following are reports in VA TMS that relate to Classes:

- Class Roster (Print from Class Record)
- Class Data
- Learning Calendar
- Registration Status



Slide 79: Related Reports

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?



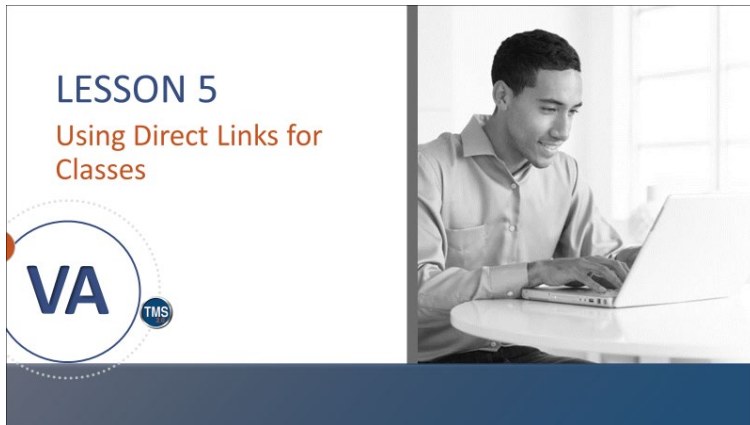
Slide 80: Questions?

Questions?

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

Notes: _____

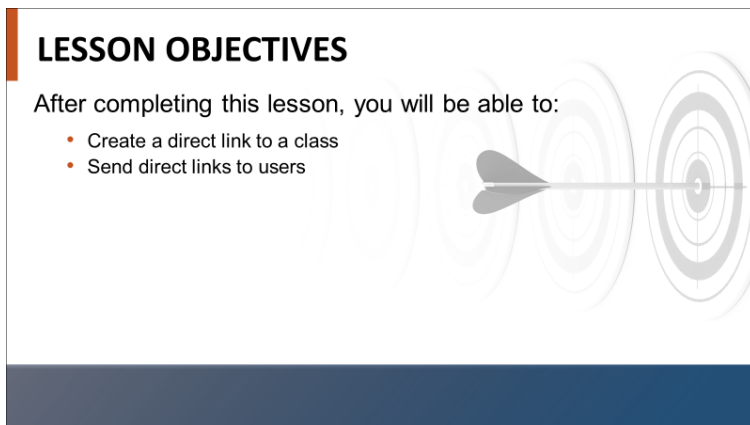
2.6 Lesson 5: Using Direct Links for Classes



Slide 81: Lesson 5: 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.



Slide 82: Lesson 5 Objectives

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: _____

Direct Link Overview

What are they?

Direct links to training content that can be shared with users

Why use them?

The links are customizable and make it easy for users to access the linked content



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.

Slide 83: DeepLink Overview



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.

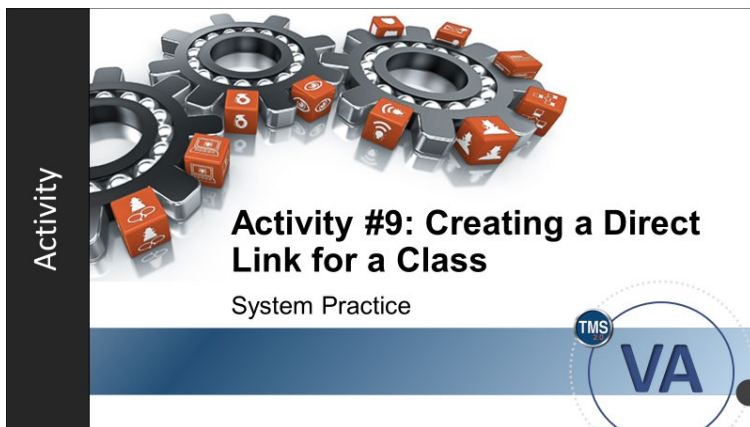
Slide 84: Demonstration: Creating a Direct Link for a Class

Notes: _____

***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).

Notes: _____



Slide 85: Activity #9: Creating a Direct Link for a Class

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.

Notes: _____

**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).

Notes: _____

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.

KNOWLEDGE CHECK

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.

Slide 86: Knowledge Check

QUESTIONS?



Questions?

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

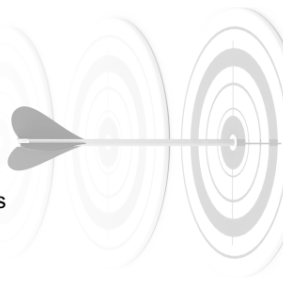
Slide 87: Questions?

Notes: _____

SESSION SUMMARY

In this session, you learned how to:

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



Slide 88: Session Summary

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 into classes
- Utilize direct links

QUESTIONS?



Slide 89: Questions?

Questions?

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

Notes: _____

Additional Resources

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

Slide 90: Additional Resources

Additional Resources

Here are some additional resources:

- TMS Resource Site:
 - <https://www.hcsc.va.gov/>
- TMS Administrators Community of Practice (COP):
 - 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.

Notes: _____

