



VA TMS 2.0 Role-Based Training: Assignment Profiles

Administrators
Role-Based Training

Virtual Instructor-Led Training
Participant Guide

December 2020

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1.0 Session Overview

1.1 Introduction

Thank you for attending the Veterans Affairs (VA) Talent Management System (TMS) Role-Based Training: Assignment Profiles. This session provides information, demonstrations, and practice opportunities related to setting up and executing automated learning assignments to users in the VA TMS.

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

1.2 Course Goal

This session provides information, demonstrations, and practice opportunities related to the Assignment Profile and the Automatic Process Manager in VA TMS 2.0.

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

- Explain the Assignment Profile groups and attributes
- Associate curricula with an Assignment Profile
- Define the Automatic Process Manager (APM)
- Use Update Users and Assignments

1.3 Target Audience

The participants of this course are Domain Managers and Learning Managers.




1.4 Participant Guide

This Participant Guide is attached to the web-conferencing session and is divided into two sections:

- About This Training
- Training Content

NOTE: Print a hard copy of this Participant Guide to use during training. You will need to reference the steps for all demonstrations and activities in these guides while completing steps in the VA TMS.

Table 1: Participant Guide Icons

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

1.5 Participant Preparation and Guidelines

Participants must complete the following for this training:

- Register for training through the VA TMS.
- Attend the Virtual Instructor-Led Training (VILT) Web conferencing session.
- Complete the post-training survey.

1.6 Demonstrations and System Practice Activities in VA TMS TRAIN Environment

During this training, you will observe instructor demonstrations and complete system practice activities within the VA TMS TRAIN environment. These demos and activities will allow you to study and apply what you've learned about the features, functions, and processes critical to your role within the VA TMS. The steps for each demonstration and activity have been provided in this guide so you can follow along. You may also want to reference these steps after the training.

1.7 Virtual Instructor-Led Training Guidelines

This training will be delivered as a Virtual Instructor-Led Training (VILT) using Web conferencing software. You will need a computer and phone with speakers or a 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 email afterward.

1.8 Course Length

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

Table 2: Session Lessons and Durations

Lesson Title	Estimated Time
Welcome and Introduction	10 minutes
Lesson 1: Assignment Profiles	50 minutes
Lesson 2: Automatic Process Manager (APM) and Update Users and Assignments	50 minutes
Lesson 3: Reports Related to Assignment Profiles	10 minutes
Questions and Answers	10 minutes

Total: 2 hours, 10 minutes

2.0 Assignment Profiles

2.1 Welcome and Introduction

System Login

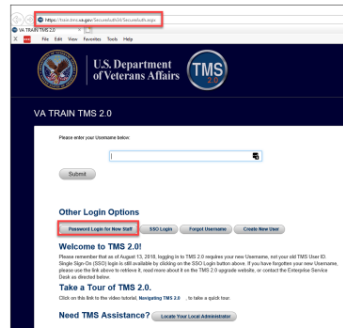
- In your browser, navigate to:
<https://train.tms.va.gov/SecureAuth34/>
- Select the **Password Login for New Staff** button.
- Enter your TRAIN Admin ID and Password.

Audio (opens 10 minutes before class):

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

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

***Please Use Internet Explorer**

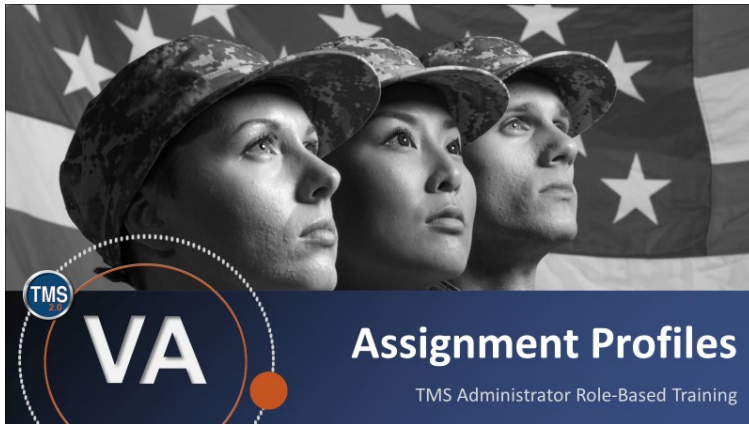


Slide 1: System Login

System Login

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

- Train Environment Link:**
<https://train.tms.va.gov/SecureAuth34/>
- Select Password Login for New Staff
- Enter your TRAIN Admin ID and Password
- VANTS Line Audio: 1-800-767-1750
- Access Code: 48596#



Slide 2: Welcome

Welcome

Welcome to TMS 2.0 Assignment Profile Training.

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 3: Participant Introductions

PARTICIPANT GUIDE

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



Slide 4: Participant Guide

LOGISTICS

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



Slide 5: Logistics

Participant Introductions

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

Participant Guide

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

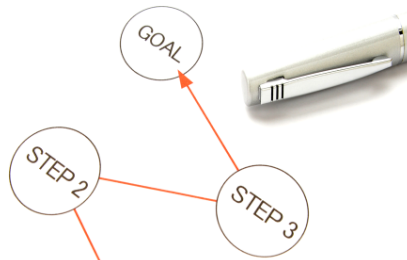
Logistics

Please review the following training logistics:

- A 10-minute break will be provided roughly every hour.
- Feel free to ask questions at any time using the chat feature.
- Please mute your audio and do not put the call on hold at any time during the training.

COURSE GOALS

This training will provide instruction and interactive practice related to Assignment Profiles. It is for administrators with this role as part of their duties or who are looking for additional knowledge concerning Assignment Profile functions.



Slide 6: Course Goals

Course Goals

This training will provide instruction and interactive practice related to Assignment Profiles. It is for administrators with this role as part of their duties or who are looking for additional knowledge concerning Assignment Profile functions.

TRAINING METHODS

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

Slide 7: Training Methods

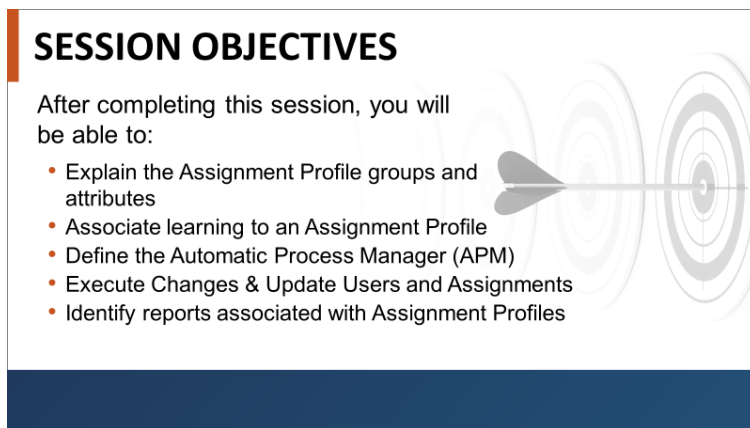
Training Methods

This VILT session will include the following training methods:

- **Content presentations:** content presentation refers to the delivery of the training to best facilitate participants' engagement, and the content presentations include the visual elements of the PowerPoint slides and demonstrations and activities within the VA TMS.
- **Instructor demonstrations:** I will demonstrate many of the VA TMS tasks you will perform as an administrator, help desk, or reports manager.
- **Practice activities:** you will practice key actions through hands-on activities in the VA TMS.
- **Knowledge checks:** your knowledge of key content will be assessed through multiple-choice/true-false knowledge checks.



Slide 8: Session Agenda



Slide 9: Session Objectives



Slide 10: Questions?

Session Agenda

This training session is 2.5 hours long and is organized as follows:

- Lesson 1: Assignment Profiles
- Lesson 2: Automatic Process Manager (APM) and Update Users and Assignments
- Lesson 3: Related Reports

Session Objectives

After completing this session, you will be able to:

- Explain the Assignment Profile groups and attributes
- Associate learning to an Assignment Profile
- Define the Automatic Process Manager (APM)
- Execute Changes & Update Users and Assignments
- Identify reports associated with Assignment Profiles

Questions?

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

2.3 Lesson 1: Assignment Profiles

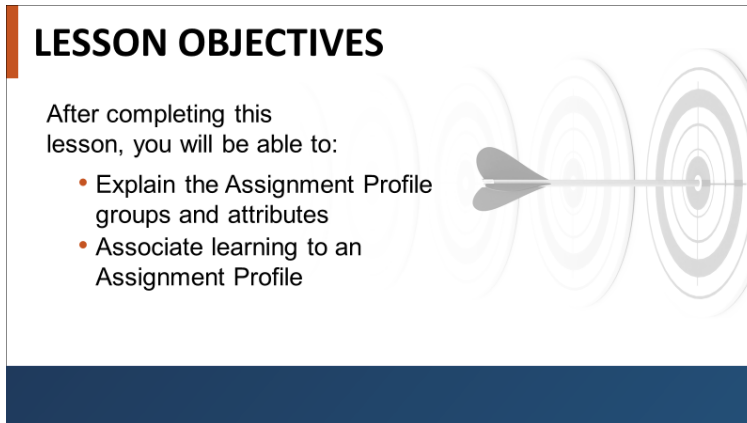


Slide 11: Lesson 1: Assignment Profiles

Lesson 1: Assignment Profiles

This lesson covers assignment profiles in the VA TMS.

Let's look at the learning objectives for lesson one.



Slide 12: Lesson 1 Objectives

Lesson 1 Objectives

After completing this lesson, you will be able to:

- Explain the Assignment Profile groups and attributes
- Associate learning to an Assignment Profile

Notes: _____

Methods of Assigning Learning

	Free-Floating Items	Curricula	Batch Assign?	Automatic Assignment?
User Record	Yes (Learning Plan; no retraining)	Yes (Curricula tab or Learning Plan)	No	No
Manage Assignments	Yes	Yes	Yes (1 time)	No
Job Codes	No	Yes	Yes	Yes
Assignment Profiles	Yes	Yes	Yes	Yes

Slide 13: Methods of Assigning Learning

Methods of Assigning Learning

There are both manual as well as automated methods to assign learning in the VA TMS. This lesson focuses on one of the automated methods of assigning learning to users.

- User Records: Free-Floating Items and Curricula
- Manage Assignments: Free-Floating Items, Curricula, and Batch Assignments
- Job Codes: Curricula, Batch Assignments, and Automatic Assignments
- Assignment Profiles: Fee-Floating Items, Curricula, Batch Assignments, and Automatic Assignments

Assignment Profile



The Assignment Profile uses the common attributes of a group of users to assign curricula and items. Key terms for assignment profiles:

- Groups
- Operator
- Attributes
- Value

Slide 14: Assignment Profile

Assignment Profile

The assignment profile provides a way to automate assigning curricula and items to a group of users who share the same training needs. The assignment profile uses the common attributes of a group of users to assign learning. Competency profiles, user roles, plans, and libraries may also be assigned using assignment profiles. Additionally, assignment profiles can provide the mechanism to auto-recommend specific courses to users based on administrator-specified attributes.

Notes: _____

Attributes

Assignment Profiles are used to define, by attributes, groups of users for the purpose of making assignments. Attributes include:

- Job position
- Supervisory level
- Organization
- Hire date
- Employee type

Slide 15: Attributes

Groups, Rules, and Attributes

- For each Assignment Profile, one or more groups of attributes may be created.
- Each group contains a set of rules, which are made up of attributes, operators, and values.
- A user's attributes must match one value from each of the attributes in any one group in order for the user to be assigned the curricula in the assignment profile.

Slide 16: Groups, Rules, and Attributes

Attributes

Assignment Profiles are used to define, by attributes (not by name), groups of users for making assignments. The power of an Assignment Profile is that, since it identifies users by their attributes (i.e., job position, organization, employee type, supervisory level, hire date, etc.), it automatically includes or excludes users as their attributes change. This function will become clearer as we move through this content and the process demonstrated in the VA TMS.

Groups, Rules, and Attributes

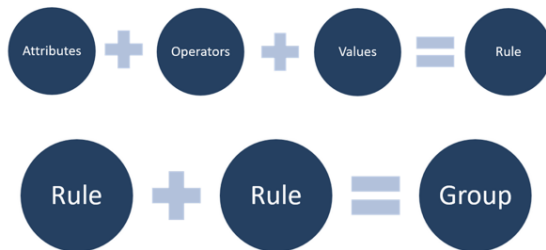
For each Assignment Profile, one or more groups may be created. Each group contains a set of rules. A user's attributes must match one value from each line item in the defined rule and reside in one of the selected security domains for the user to be assigned the curricula in the Assignment Profile.

Once an attribute has been added to a rule, the specific values for the attribute must also be added, as well as an operator. An operator is an action term selected to restrict these values. Operators include:

- Contains/Does Not Contain
- Starts With/Does Not Start With
- Matches/Does Not Match
- Is Empty/Is Not Empty

Notes: _____

Groups, Rules, and Attributes (cont'd)

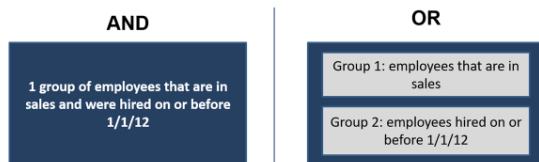


Slide 17: Creating a Rule

Profile Attributes

Example of assigning users to an Assignment Profile with the following attributes:

- Job Code: Sales
- Hire Date: On or before 1/1/12



Slide 18: Profile Attributes

Creating a Rule

Rules consist of attributes, operators, and values. Groups consist of one or more rules.

Profile Attributes

One group creates an **AND** relationship.

Two groups create an **OR** relationship.

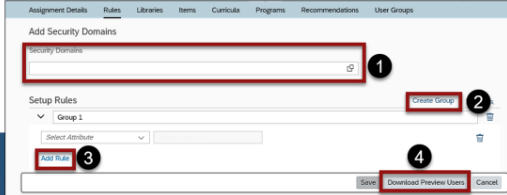
In our scenario displayed on the slide, we have two rules: 1) user job code equals sales and 2) user hire date is on or before 01/01/2012.

If both rules are placed in one group, an **AND** relationship is formed. This yields a smaller number of qualifying users. If each rule is placed in its own group, an **OR** relationship is formed. This yields a higher total number of qualifying users.

Notes: _____

Adding Rules to the Assignment Profile

1. Add Security Domain(s).
2. Create Group(s).
3. Create Rule(s) by selecting an attribute, operator, and value.
 - Rules in the same group create an AND relationship.
 - Adding a new group creates an OR relationship.
4. Select Download Preview Users to view which users match the assignment profile's criteria.



Slide 19: Adding Rules to the AP

Adding Rules to the AP

1. Add Security Domain(s).
2. Create Group(s).
3. Create Rule(s) by selecting an attribute, operator, and value.
 - Rules in the same group create an AND relationship.
 - Adding a new group creates an OR relationship.
4. Select Download Preview Users to view which users match the assignment profile's criteria.

Execute Changes

- Visible in the Actions area only when Execute Changes is required
- Will “push” any associated items or curricula to those matching the profile criteria
- Only needs to be performed once after Assignment Profile is created (or when changes are made to its rules)

Execute Changes

To “push” the assignment profile out to users who currently match the profile criteria, select the **Execute Changes** link in the **Actions** area. Manual execution only needs to be done, and will only be visible, when the assignment profile is initially created or if the security domains or attributes in the rule change.

Slide 20: Execute Changes

Notes: _____



Slide 21: Demonstration: Add a New Assignment Profile

Demonstration: Add a New Assignment Profile

Now I'll demonstrate how to add a new assignment profile in the VA TMS.

Notes: _____



Demonstration: Add a New Assignment Profile

To Add a New Assignment Profile:

1. Navigate to **Manage User Learning > Assignment Profile**.
2. Select **Add New**.
3. Enter an **Assignment Profile ID** (TRA-Your Initials-Today's Date).
4. Enter a **Description** (Test).
5. Enter a **Security Domain** (TRAIN).
6. Enter a **Contact Email Address** for the person responsible for the Assignment Profile.
Note: The Created For field is optional and identifies the person who requested the Assignment Profile to be created. You can also enter applicable Notes as needed.
7. Select **Add**.

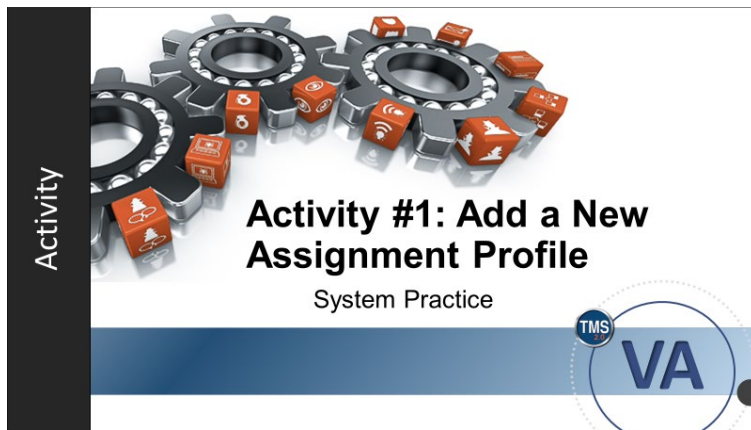
To Set Up Rules for an Assignment Profile:

1. Select the **Rules** tab in the Related Area.
2. In the Security Domains section, select the **Add Security Domain(s)** icon.
3. Select **Search** in the popup window.
4. Check the box for the **LMS Training Domain** in the Top Level Only column.
5. Select **Add**.
6. In the **Setup Rules** section, select **Create Group**.
7. Enter "Group 1" in the **Enter Group Name** field.
8. Select **Is Full-Time** from the Attribute dropdown menu.
9. Select **Equals** from the Operator dropdown menu.
10. Select **Yes** from the Value dropdown menu.
11. Select **Add Rule** to populate a new rule row. **Note:** When you add more than one rule to the same group, you are establishing an **AND** relationship.
12. Select **Hire Date** from the Attribute dropdown menu.
13. Select **On or Before** from the Operator dropdown menu.
14. Select the **calendar icon** in the Value field to select a random date on the calendar.

Notes: _____

15. Select **Save**.
16. Select **Create Group** to add a new group. **Note:** When you create another group, you are establishing an **OR** relationship.
17. Enter “Group 2” in the **Enter Group Name** field.
18. Select **VA State** from the Attribute dropdown menu.
19. Select **Matches** from the Operator dropdown menu.
20. Select the **icon** in the Value field in order to check the box next to a state. Select **Add**.
21. Select **Save**. **Note:** When you select **Download Preview Users**, it will generate an Excel report that shows which users currently match the assignment profile’s criteria.

Notes: _____



Slide 22: Activity #1: Add a New Assignment Profile

Activity #1: Add a New Assignment Profile

Now you will have an opportunity to practice adding an assignment profile in the VA TMS.

Complete the steps for this activity on the next page. If you have any questions during the activity, send them to the instructor using the Chat feature.

Notes: _____



Activity #1: Add a New Assignment Profile

To Add a New Assignment Profile:

1. Navigate to **Manage User Learning > Assignment Profile**.
2. Select **Add New**.
3. Enter an **Assignment Profile ID** (TRA-Your Initials-Today's Date).
4. Enter a **Description** (Test).
5. Enter a **Security Domain** (TRAIN).
6. Enter a **Contact Email Address** for the person responsible for the Assignment Profile.
Note: The Created For field is optional and identifies the person who requested the Assignment Profile to be created. You can also enter applicable Notes as needed.
7. Select **Add**.

To Set Up Rules for an Assignment Profile:

1. Select the **Rules** tab in the Related Area.
2. In the Security Domains section, select the **Add Security Domain(s)** icon.
3. Select **Search** in the popup window.
4. Check the box for the **LMS Training Domain** in the Top Level Only column.
5. Select **Add**.
6. In the **Setup Rules** section, select **Create Group**.
7. Enter "Group 1" in the **Enter Group Name** field.
8. Select **Is Full-Time** from the Attribute dropdown menu.
9. Select **Equals** from the Operator dropdown menu.
10. Select **Yes** from the Value dropdown menu.
11. Select **Save**.
12. Select **Create Group** to add a new group.
13. Enter "Group 2" in the **Enter Group Name** field.
14. Select **VA State** from the Attribute dropdown menu.
15. Select **Matches** from the Operator dropdown menu.

Notes: _____

16. Select the **icon** in the Value field in order to check the box next to a state. Select **Add**.
17. Select **Save**. **Note:** When you select **Download Preview Users**, it will generate an Excel report that shows which users currently match the assignment profile's criteria.

Notes: _____

Associating Learning

- Curricula and items are added to the assignment profile from the Curricula tab or Items tab in the Related area.
- Multiple curricula or items can be assigned through a single assignment profile
- Free-standing items can be managed from the Assignment Profiles tab on the item record (read-only) or the Items tab in the assignment profile record (editable)

Slide 23: Associating Learning

Associating Learning

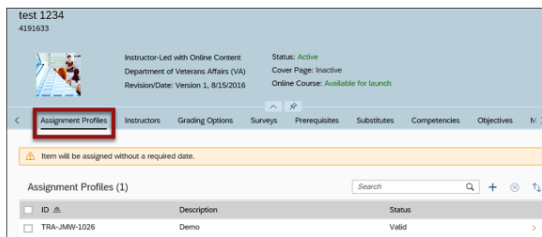
Curricula and items are added to the assignment profile from the Curricula or Items tab from the Related area of the assignment profile record. Multiple curricula or items can be assigned through a single assignment profile if needed.

Free-standing items that are associated can be managed from the Assignment Profiles tab of the item record (read-only) or the Items tab of the assignment profile record (editable and removable).

Note: The Edit functionality is only available for those who are assigned the role of an Assignment Profile Manager. The View functionality is available for most other roles.

Assignment Profiles Tab

- From an **item record**, select the Assignment Profiles tab to display a list of Assignment Profiles to which it belongs.



Slide 24: Assignment Profiles Tab

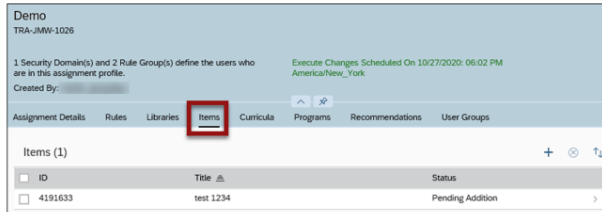
Assignment Profiles Tab

If you are working within an item, you can click the new Assignment Profiles tab. From the Assignment Profiles tab, you can view all assignment profiles that the item is a part of. You can even add the item to another assignment profile or remove it from a listed assignment profile.

Notes: _____

Items Tab

- From the **Assignment Profile** record, select the Items tab to view, add, or remove items from a user's To-Do List.



Slide 25: Items Tab

Items Tab

If you are working within an assignment profile, you can select the new 'Items' tab. From the Items tab, if you have the appropriate permissions, you can view, edit, and remove all single, free-standing items that have been assigned to that assignment profile.

The same method of adding, editing, and removing can be applied to relating curriculum and assignment profiles.

Demonstration: Add Learning to an Assignment Profile

To better understand the relationship between curricula, free-standing items, and assignment profiles, the instructor will add them both to an assignment profile in our next demonstration



Slide 26: Demonstration: Add Learning to an Assignment Profile

Notes: _____



Demonstration: Add Learning to an Assignment Profile

To add Curricula:

1. Access the Assignment Profile record created in Activity #1. Navigate to **Manage User Learning > Assignment Profiles** to perform a search, or you can access the record from your **Recents**.
2. Select the **Curricula** tab.
3. Select the **Add Curriculums** (plus sign) icon.
4. Enter criteria to search for curricula. You can find any curriculum record by searching the TRAIN security domain.
5. Select **Search**.
6. Check the **Add** checkbox for the curricula to associate with the assignment profile.
7. Select **Add**.
8. The Assignment Profile now has Curriculum attached. Repeat **steps 3-7** for each Curriculum to add to the profile.

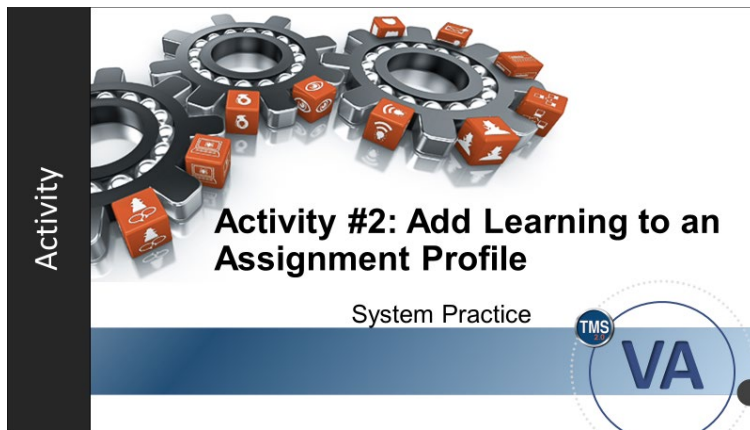
To add an Item:

1. Select the **Items** tab.
2. Select the **Add Items** (plus sign) icon.
3. The **Items** popup window is displayed. You will now search for an item to add to the assignment profile.
4. Find an Item by searching the **TRAIN** security domain.
5. Select **Search**.
6. An item is displayed. Select the **Add checkbox** to the right of the item title. **Note:** If you need to, you can add multiple items at this point.
7. Select **Add**.
8. The Assignment Profile record is now displayed with the free-standing Item attached.
9. Select the newly associated item's row under the Items tab. This displays the Item record. While in the record, find and select the Assignment Profiles tab. Display the options to add and remove assignment profiles. This same option is available in the Curricula record.
10. Navigate back to the Assignment Profile by selecting the profile listed and utilizing the cross-entity link.

Notes: _____

11. In the Assignment Profile record, notice the alert in the Core Area. When an assignment profile is created or when changes are made to the record, the Core Area will display a message alerting the Admin “Execute Changes Required.” In the Actions area, select **Execute Changes**. The system may require you to schedule this as a background job. Once this job runs, all users with the attributes you specified will be assigned the selected learning. The assignment profile is now considered active and will be run by the Automatic Process Manager.

Notes: _____



Slide 27: Activity #2: Add Learning to an Assignment Profile

Activity #2: Add Learning to an Assignment Profile

Now you will have an opportunity to practice adding learning to an assignment profile on your own.

Complete the steps for this activity on the next page. If you have any questions during the activity, send them to the instructor using the chat feature.

Notes: _____



Activity #2: Add Learning to an Assignment Profile

To add Curricula:

1. Access the Assignment Profile record created in Activity #1. Navigate to **Manage User Learning > Assignment Profiles** to perform a search, or you can access the record from your **Recents**.
2. Select the **Curricula** tab.
3. Select the **Add Curriculums** (plus sign) icon.
4. Enter criteria to search for curricula. You can find any curriculum record by searching the TRAIN security domain.
5. Select **Search**.
6. Check the **Add** checkbox for the curricula to associate with the assignment profile.
7. Select **Add**.
8. The Assignment Profile now has Curriculum attached. Repeat **steps 3-7** for each Curriculum to add to the profile.

To add an Item:

1. Select the **Items** tab.
2. Select the **Add Items** (plus sign) icon.
3. The **Items** popup window is displayed. You will now search for an item to add to the assignment profile.
4. Find an Item by searching the **TRAIN** security domain.
5. Select **Search**.
6. An item is displayed. Select the **Add checkbox** to the right of the item title. **Note:** If you need to, you can add multiple items at this point.
7. Select **Add**.
8. The Assignment Profile record is now displayed with the free-standing Item attached. In the **Actions** area, select **Execute Changes**.
9. Ensure **Run this job immediately, if allowable** is selected. Uncheck the **Notify via email upon completion** box. **Note:** In the Live TMS, this option is useful. In Train, there are no emails associated with the usernames we use. We uncheck this box to avoid an error message.

Notes: _____

10. Select **Finish**.

11. Select **Back to Assignment Profile**.

Notes: _____

Other Things to Associate via APs

- **Libraries:** Users must have access to a library to see its items
- **Programs:** Mass assigns program(s) to many users at once
- **Recommendations:** Recommends items to certain users to appear on their home pages

Slide 28: Other Things to Associate via Assignment Profiles

Recommending Items

- As an administrator, you can enable the item recommendations setting.
- Once done, you can add one or more items to the Recommendations tab of an assignment profile when you want to recommend those items to users in the assignment profile.

Slide 29: Recommending Items

Other Things to Associate via Assignment Profiles

Other items to associate include:

- **Libraries:** Users must have access to a library to see the items in it
- **Programs:** Mass assigns one or more programs to many users at once
- **Recommendations:** Recommends items to certain users to appear on their My Learning page

Recommending Items

As an administrator, you can enable the item recommendations setting.

After you set this value to true, you can add one or more items to the Recommendations tab of an assignment profile when you want to recommend those items to the users in the assignment profile. An item appears in the user's library or on the user's home page if the Item is:

- In a library that is assigned to the user
- Not already on the user's My Learning list
- Not in the user's learning history (completed work)

If a user dismisses an administrator-recommended item, then that Item does not appear on the user's homepage as a recommended item, even if an administrator adds it as a recommended item to a different assignment profile in which the user is included.

Notes: _____

Statutes

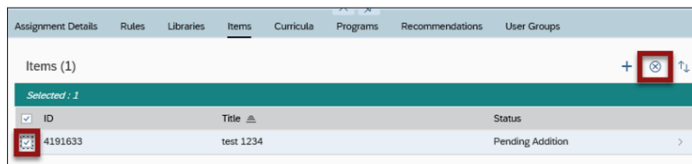
Once components have been added to an assignment profile, they can have one of three statuses:

- **Valid** (the assignment profile has executed changes)
- **Pending Addition** (the assignment profile has not executed changes)
- **Pending Deletion** (the assignment profile has not executed changes)

Slide 30: Statutes

Removing an Item

If you remove an item that has the status Pending Addition, it will not impact the users' To-Do lists.



ID	Title	Status
4191633	test 1234	Pending Addition

Slide 31: Removing an Item

Statutes

Once components have been added to an assignment profile, they can have one of three statuses:

- **Valid:** The assignment profile has executed changes
- **Pending Addition:** The assignment profile has not executed changes
- **Pending Deletion:** The assignment profile has not executed changes

Removing an Item

Let's say you added an item accidentally and need to remove it. If you remove an item, you can cancel the action before you execute changes so that the user's to-do lists are not updated.

To remove an item that has already been executed, you would need to select the Delete checkbox, which would change the status to Delete Pending, and then you would need to execute changes again to officially remove the Item from the assignment profile. This is the same process to remove any component added to an assignment profile that needs to be removed.

Notes: _____

Required Date Assignment

Items with required dates cannot be assigned by an assignment profile if the Initial Basis list has either of the two settings:

- Calendar
- Event, with a blank Initial Number

Required Date Assignment

If an item has a required date, it must be by Event Basis, with an initial number.

From the Item record, you can select the Item Details tab. Within the Assignments section, look for an option called Initial Basis. If this is set to Calendar, or to a blank event, it cannot be assigned to an assignment profile.

Slide 32: Required Date Assignment

Notes: _____

Changing an Initial Assignment

- Any changes to the item's initial assignment are made to assignment profile through the automatic process manager
- Modified item IS NOT reassigned to users who have already been assigned the item
- Modified item IS reassigned with updated attributes if user attributes have changed since the APM

Slide 33: Changing an Initial Assignment

Changing an Initial Assignment

As an admin, you can change an item's initial assignment. When you change the initial assignment attributes of an item, the system will execute an Update Users and Assignments process through the Automatic Process Manager (APM). Unlike Execute Changes, which is a manual update, APM is automatic.

For example, if all HR employees are assigned specific training, and a new employee is hired, APM would automatically assign that training to the new hire.

The APM will not reassign the modified Item (with its updated initial assignment attributes) to users who have already been assigned the Item through the assignment profile.

However, users who move into the assignment profile because their user attributes have changed since the last time the system executed the APM will receive the Item with its updated initial assignment attributes.

So, returning to our example, the modified Item (the training) is not reassigned to users who have already been assigned the Item because the training is already on their To-Do Lists. The training will only appear for the new employee.

Notes: _____

Which user matches the following assignment profile criteria?

Security Domain: **HR, IT**

Job Location Matches: **DC, MD, CA**

Hire Date Between: **01/01/2000- 12/31/2017**



KNOWLEDGE CHECK

- a) Tom: Security Domain= **IT**, Job Location= **DC**, Hire date= **06/15/2016**
- b) Jane: Security Domain= **HR**, Job Location= **MD**, Hire date= **04/05/2018**
- c) Bob: Security Domain= **EHS**, Job Location= **DC**, Hire date= **07/08/2015**
- d) George: Security Domain= **IT**, Job Location= **VA**, Hire date= **10/30/2015**

Slide 34: Knowledge Check

Knowledge Check

Answer the following question using the chat feature.

Which user matches the following assignment profile criteria?

Security Domain: **HR, IT**

Job Location (Matches): **DC, MD, CA**

Hire Date (Between): **1/1/2000 – 12/31/2017**

- a) Tom, Security Domain = **IT**, Job Location = **DC**, Hire date = **06/15/2016**
- b) Jane, Security Domain = **HR**, Job Location = **MD**, Hire date = **04/05/2018**
- c) Bob, Security Domain = **EHS**, Job Location = **DC**, Hire date = **07/08/2015**
- d) George, Security Domain = **IT**, Job Location = **VA**, Hire date = **10/30/2015**

QUESTIONS?



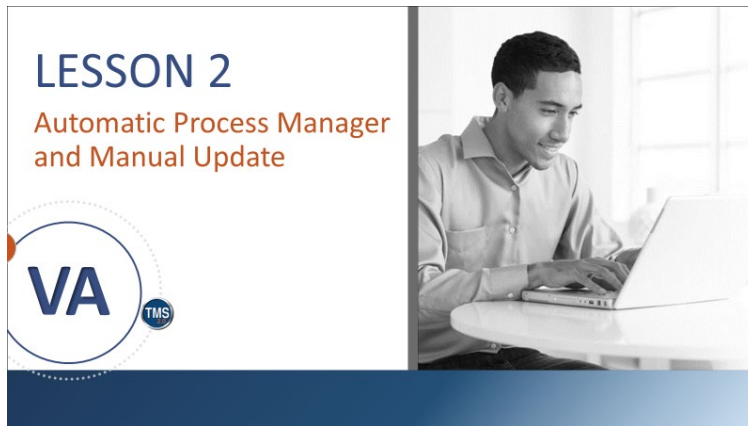
Slide 35: Questions?

Questions?

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

Notes: _____

2.4 Lesson 2: Automatic Process Manager and Manual Update

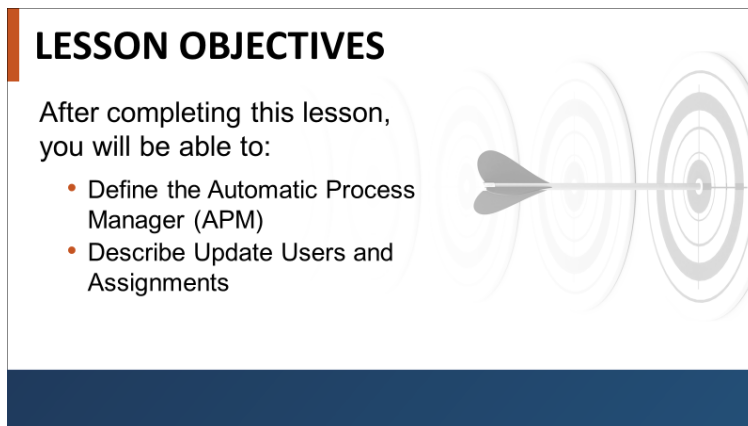


Slide 36: Lesson 2: Automatic Process Manager and Manual Update

Lesson 2: Automatic Process Manager and Manual Update

This lesson addresses the Automatic Process Manager (APM) and Update Users and Assignments features in TMS 2.0.

Let's look at the learning objectives for Lesson 2.



Slide 37: Lesson 2 Objectives

Lesson 2 Objectives

After completing this lesson, you will be able to:

- Define the Automatic Process Manager (APM)
- Describe Update Users and Assignments

Notes: _____

Automatic Process Manager (APM)

- Any time an Assignment Profile is created or changed, you must Execute Changes through a background job before it can be synchronized through the automatic process.
- Assignment Profiles that have not Execute Changes are skipped during the APM.

Slide 38: Automatic Process Manager (APM)

Automatic Process Manager (APM)

Administrators set up assignment profiles in the VA TMS and configure the Assignment Profile APM to periodically synchronize the assignment profiles by running through new and changed user attributes to sort users in accordance with their profile.

For example, you can configure an assignment profile to include all users in a selected city. The system looks for the city attribute of the user object and assigns all matching users to the new assignment profile. When you add or change an assignment profile, you must execute changes, meaning that the system runs through all user records to find users in a matching city to put in the new assignment profile.

Execute Changes and Update Users and Assignments are two different processes. Any time an assignment profile is created or changed, an Admin must Execute Changes through a background job before it can be synchronized through the automatic process. Assignment profiles that have not Executed Changes are skipped during the assignment profile APM.

Notes: _____

Update Users and Assignments

- The system only allows you to update an Assignment Profile after you have selected Execute Changes.
- When you select Update Users and Assignments from the Actions area, you can schedule the job to run immediately or in the background rather than wait for APM.

Slide 39: Update Users and Assignments

Update Users and Assignments

When and why would you manually update an assignment profile?

Let's say that you just added ten new user records for individuals who are starting with your company today. If they log in to the user interface, they have no items in their To-Do List and no access to any libraries. For all new hires, though, your company wants them to take some "New Hire" orientation training, and your company has created a "New Hire" assignment profile that includes all new hires. In this situation, you could access the "New Hire" assignment profile and select **Update Users and Assignments** in the Actions area. If you run the job immediately, then the new hires could log in to the user interface and access their orientation training on their first day of employment.

The system allows you to manually update an assignment profile only after you have executed changes. When you select Update Users and Assignments, you can schedule the job to run immediately or in the background. When the job runs, the system executes the Assignment Profile update automatic process but only for this assignment profile.

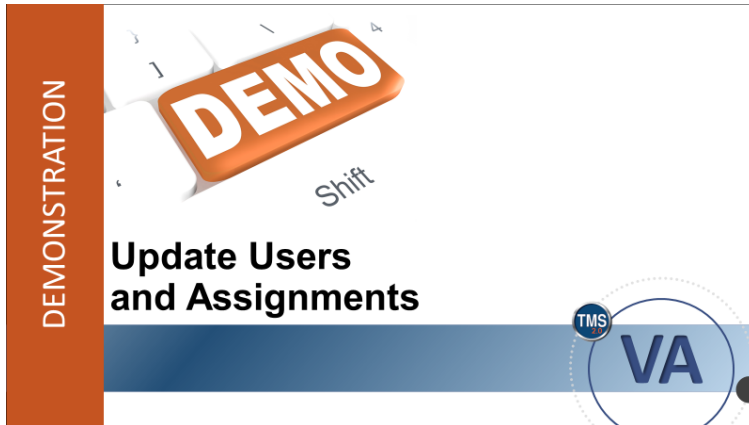
Once the assignment profile has Executed Changes, the Assignment Profile APM runs on a regularly scheduled basis. The Assignment Profile APM looks at every active user record to see whether there are any users who now meet or no longer meet the assignment profile criteria. For users who now meet the criteria, the learning

Notes: _____

assignment is made; for users who no longer meet the criteria, if the learning assignment was originally made through the assignment profile, the learning is removed (unassigned) from the user.

Demonstration: Update Users and Assignments

The instructor will now demonstrate how to update users and assignments for an assignment profile.



Slide 40: Demonstration: Update Users and Assignments

Notes: _____



Demonstration: Update User and Assignments

1. Access the Assignment Profile record created in Activity #1. Navigate to **Manage User Learning > Assignment Profiles** to perform a search, or you can access the record from your **Recents**.
2. Select **Update Users and Assignments** from the **Actions** area dropdown menu.
3. Select “Run this job immediately, if allowable.”
4. Uncheck the **Notify via email upon completion** checkbox (for the purpose of training).
5. Select **Finish**.
6. Select **Back to Assignment Profile**.

Notes: _____

What is the name of the process to update an assignment profile's user pool manually?



- a) Update Users and Assignments
- b) Libraries
- c) Recommendations
- d) Execute Changes

KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature.

What is the name of the process to update an AP's user pool manually?

- a) Update Users and Assignments
- b) Libraries
- c) Recommendations
- d) Execute Changes

Slide 41: 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 42: Questions?

Notes: _____

2.5 Lesson 3: Reports Related To Assignment Profiles

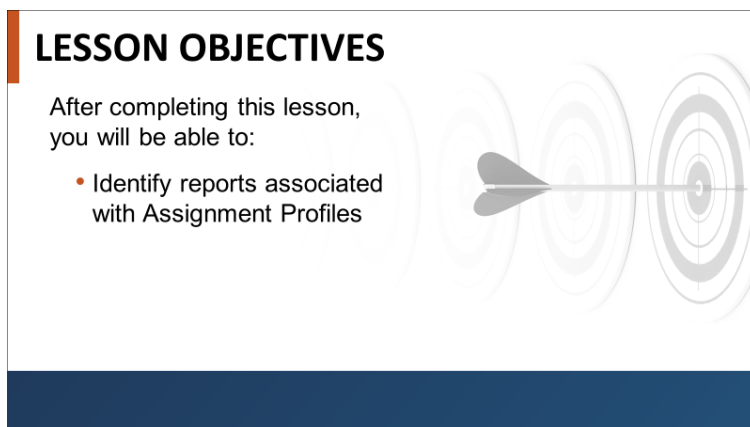


Slide 43: Lesson 3: Reports Related to Assignment Profiles

Lesson 3: Reports Related to Assignment Profiles

There are different reports available in TMS 2.0 that provide administrators data associated with Assignment Profiles.

Let's look at the learning objectives for Lesson 3.



Slide 44: Lesson 3 Objectives

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Identify reports associated with Assignment Profiles

Notes: _____

Related Reports

The following are reports in VA TMS that relate to Assignment Profiles:

- Learning Needs
- User Learning Plan
- Curriculum Status
- Curriculum Item Status

Related Reports

The following are reports in VA TMS that relate to Assignment Profiles:

- Learning Needs
- User Learning Plan
- Curriculum Status
- Curriculum Item Status

Slide 45: Related Reports

Learning Needs Report

User Learning Needs Group By Item

Item :

VA 3730296 (Rev 1 - 5/31/2012 05:04 PM America/New York)

Title :

TMS Part 1 of 1-Introduction to TMS for All Administrators, Help Desk and Reports Managers

Users

User ID	User Name	Required Date	Assignment Type	Days Remaining
*****		7/16/2017 America/New York	Required (Required)	-27
*****		6/1/2017 America/New York	Required (Required)	-9
*****		5/2/2017 America/Los Angeles	Required (Required)	-84
*****		5/21/2017 America/New York	Required (Required)	-71

7:11:26:31 PM Eastern Daylight Time

Page

1 of 1

7/11/2017 11:26:31 PM Eastern Daylight Time

Page 1 of 1

Learning Needs Report

Here is an example of the:

Learning Needs Report: The Learning Needs report returns the learning needs of users. Learning needs are learning items or curricula that users need to complete.

Slide 46: Learning Needs Report

Notes: _____

User Learning Plan Report

Learning Plan							
User		User Name					
Learning Plan							
Entry ID	Entry Title	Entry Type	Required Date	Days Rem	Assignment Type	Curriculum ID	Complete Date
AFED 127810 (New) 1 - 2/26/2010 08:28	Leadership Essentials: Motivating Employees	Item					
PM AmericanNew York							
AFED 127810 (New) 1 - 2/26/2010 08:37	Leadership Essentials: Communicating Vision	Item					
PM AmericanNew York							
AFED 127810 (New) 1 - 2/26/2010 08:47	Leadership Essentials: Building Your Influence as a Leader	Item					
PM AmericanNew York							
AFED 127810 (New) 1 - 2/26/2010 05:51	Leadership Essentials: Leading with Emotional Intelligence	Item					
PM AmericanNew York							
AFED 127810 (New) 1 - 2/26/2010 06:26	Leadership Essentials: Leading with Emotional Intelligence	Item					
PM AmericanNew York							
AFED 127810 (New) 1 - 2/26/2010 05:53	Leadership Essentials: Creating Your Own Leadership Development Plan	Item					
PM AmericanNew York							
AFED 106615 (New) 1 - 2/26/2011 04:33	Delivering Bad News Effectively - Challenge Center	Item					
PM AmericanNew York							
AFED 106615 (New) 1 - 2/26/2011 04:38	Delivering Bad News Effectively - Challenge Center	Item					
PM AmericanNew York							
AFED 172326 (New) 1 - 6/24/2011 03:24	Developing a Presentation	Item					
PM AmericanNew York							
AFED 172326 (New) 1 - 6/24/2011 03:24	Developing a High-Performance Organization	Item					
PM AmericanNew York							
AFED 172430 (New) 1 - 6/25/2011 03:43	The Value of Leadership	Item					
PM AmericanNew York							
AFED 106467 (New) 1 - 9/30/2010	Responding to Bad Copynets	Item					
PM AmericanNew York							

Slide 47: User Learning Plan Report

Curriculum Status Report

User	Active	First Name	Last Name	Middle Initial	Parent Curriculum	Career Curriculum	Career Curriculum Days	Rem Item ID	Item Type	Item Rev	Revision / Last Date	Item Comp	Item Comp / Revision
*****	No	HUN-09	HUN-09	TMS AdmVns	*****	*****	*****	3780266 VA	5/3/2012	1 TMS Part: ***** VA - COMI/VA-Compl			
*****	No	HUN-09	HUN-09	TMS AdmVns	*****	*****	*****	3780266 VA	5/3/2012	1 TMS Part: ***** VA - COMI/VA-Compl			
*****	Yes	HUN-09	HUN-09	TMS AdmVns	*****	*****	5/3/2013	3780266 VA	5/3/2012	1 TMS Part: ***** VA - COMI/VA-Compl			
*****	No	HUN-09	HUN-09	TMS AdmVns	*****	*****	5/3/2013	3780266 VA	5/3/2012	1 TMS Part: ***** VA - COMI/VA-Compl			
*****	No	HUN-09	HUN-09	TMS AdmVns	*****	*****	*****	3780266 VA	5/3/2012	1 TMS Part: ***** VA - COMI/VA-Compl			
*****	Yes	HUN-09	HUN-09	TMS AdmVns	*****	*****	*****	3780266 VA	5/3/2012	1 TMS Part: ***** VA - COMI/VA-Compl			
*****	No	HUN-09	HUN-09	TMS AdmVns	*****	*****	*****	*****	*****	*****	*****	*****	*****
*****	Yes	HUN-09	HUN-09	TMS AdmVns	*****	*****	*****	*****	*****	*****	*****	*****	*****
*****	No	HUN-09	HUN-09	TMS AdmVns	*****	*****	*****	*****	*****	*****	*****	*****	*****
*****	No	310-TMS	310-TMS	TMS HrmNo	*****	*****	*****	-1213 1133280 NFD	7/21/2011	1 Talent Management System (TMS) Trainin			
*****	No	310-TMS	310-TMS	TMS HrmNo	*****	*****	*****	-1213 1117 VA	12/17/2006 10:00 APALMS ASD Teleconferences				
*****	No	310-TMS	310-TMS	TMS HrmNo	*****	*****	*****	-1213 1118 VA	12/17/2006 10:00 APALMS SCAM Teleconferences				

Slide 48: Curriculum Status Report

Curriculum Item Status Report

Curriculum Item Status					
User: [Name] User Name: [Name] [Add] [Edit] [Delete]					
Curricula	Completed	Assignment Date	Days Remaining		
CHS-820 Exam for T&B Admin (4 Ratings)	Yes	2/20/21			
Name	Type	Completion Date	Completion Status	Required Date	
86.375098 (Rev 5/1/2012) (8/24 PM America/New York)	T&B Part 1 of 1 Introduction to T&B for All Administrators, Help (12/2/2013) (8/24 PM America/New York) and Reports Managers	Yes	Yes - COMPLETE (Job Completed)		
User: [Name] User Name: [Name] [Add] [Edit] [Delete]					
Curricula	Completed	Assignment Date	Days Remaining		
CHS-820 Exam for T&B Admin (4 Ratings)	Yes	2/20/21			
Name	Type	Completion Date	Completion Status	Required Date	
86.375098 (Rev 5/1/2012) (8/24 PM America/New York)	T&B Part 1 of 1 Introduction to T&B for All Administrators, Help (12/2/2013) (8/24 PM America/New York) and Reports Managers	Yes	Yes - COMPLETE (Job Completed)		

Slide 49: Curriculum Item Status Report

Learning Plan Report

Here is an example of the:

User Learning Plan Report: The User Learning Plan report returns the Learning Plan of users. User Learning Plans are users' personal dockets of learning items and curricula.

Curriculum Status Report

Here is an example of the:

Curriculum Status Report: The user Curriculum Status report returns the curriculum assigned to each user and his or her curriculum status, and if applicable, the number of days remaining before required retraining to keep the curriculum current.

Curriculum Item Status Report

Here is an example of the:

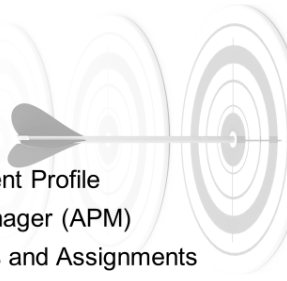
Curriculum Item Status Report: The user Curriculum Item Status report returns, for each user, the curriculum assigned to each user and his or her curriculum status, the items assigned to each curriculum and the completion date, completion status, and required date for each item.

Notes: _____

SESSION SUMMARY

In this session, you learned how to:

- Explain the Assignment Profile groups and attributes
- Associate learning to an Assignment Profile
- Define the Automatic Process Manager (APM)
- Execute Changes & Update Users and Assignments
- Identify reports associated with Assignment Profiles



Slide 50: Session Summary

Session Summary

This concludes today's session. You should now be able to:

- Explain the Assignment Profile groups and attributes
- Associate learning to an Assignment Profile
- Define the Automatic Process Manager (APM)
- Execute Changes & Update Users and Assignments
- Identify reports associated with Assignment Profiles

QUESTIONS?



Slide 51: Questions?

Questions?

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

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. Bashshar: Clarence.Bashshar@va.gov

Slide 52: Additional Resources

Additional Resources

Here are some additional TMS resources to use if needed:

- TMS Resource Site:
<https://www.hcsc.va.gov/>
- TMS Administrators Community of Practice (COP): gain access through emailing
VATMSCoP@va.gov
- Help Desk: 1-855-673-4357
- Clarence.Bashshar@va.gov

Notes: _____

