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

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS TRAIN environment.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>This icon indicates that participants will complete an activity in VA TMS TRAIN environment.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>This icon indicates that there is a job aid available for the task.</td>
</tr>
</tbody>
</table>

1.5 Participant Preparation and Guidelines

Participants must complete the following for this training:

- Register for training through the VA TMS.
- 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>
<thead>
<tr>
<th>Lesson Title</th>
<th>Estimated Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome and Introduction</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Lesson 1: Assignment Profiles</td>
<td>50 minutes</td>
</tr>
<tr>
<td>Lesson 2: Automatic Process Manager (APM) and Update Users and Assignments</td>
<td>50 minutes</td>
</tr>
<tr>
<td>Lesson 3: Reports Related to Assignment Profiles</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Questions and Answers</td>
<td>10 minutes</td>
</tr>
</tbody>
</table>

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.

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#

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

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.

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.
**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

Lesson 1: Assignment Profiles
This lesson covers assignment profiles in the VA TMS.
Let’s look at the learning objectives for lesson one.

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

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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 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.
Attributes

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

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

Groups, Rules, and Attributes

For each Assignment Profile, one or more groups 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.

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
**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.

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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.

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)

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

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.

Notes:
Demonstration: Add a New Assignment Profile

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

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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.
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.
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.

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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.

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**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).

**Assignment Profiles Tab**

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

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**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.

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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.

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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.
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.
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.

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

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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

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

Slide 29: Recommending Items

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 users in the assignment profile.

- 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.

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Statuses

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

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

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.

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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

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**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.

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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

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.
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: 01/01/2000 - 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?

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

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2.4 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.

Lesson 2 Objectives

After completing this lesson, you will be able to:

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

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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.

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.

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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.

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...
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.

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.
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

Questions?

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

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Identify reports associated with Assignment Profiles

Notes:

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________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
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

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:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Learning Plan Report
Here is an example of the:


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.
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?

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

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

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
  VATMCoP@va.gov
- Help Desk: 1-855-673-4357
- Clarence.Bashshar@va.gov