



VA TMS 2.0 Domain Manager and Learning Manager Course

Virtual Instructor-Led Training

Participant Guide

Session 3 of 4

December 2020

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1.0 Training Overview

1.1 About the Training

1.1.1 Introduction

Thank you for attending the Veterans Affairs (VA) Talent Management System (TMS) Domain Manager and Learning Manager Training: Session 3 of 4. Through discussions, demonstrations, and hands-on activities, this training teaches DM/LM responsibilities, including creating item evaluation, follow-up evaluation, and learning evaluation surveys.

1.1.2 Course Delivery Methods

The DM/LM Training is a blended learning experience comprised of four prerequisite courses and four VILT sessions. The following courses are a prerequisite and must be completed **prior to attending** the DM/LM VILT sessions:

- Introduction to VA TMS for Administrators (VILT or WBT)
- VA TMS Training for Scheduling Managers (VILT or WBT)
- VA TMS Training for Assignment Managers (VILT or WBT)
- VA TMS Training for Registration Managers (VILT or WBT)

The DM/LM VILT sessions will be presented as four separate live webinars. A Web conferencing software tool will be used to conduct the training sessions.

1.1.3 Course Goal

Domain Managers and Learning Managers play an important role in helping VA employees grow professionally. Therefore, it is imperative that they are familiar with their responsibilities within the VA TMS.

The goal of the DM/LM Training is to provide instruction and interactive practice on the core concepts and administrative functions of the VA TMS specific to DM and LM roles.




1.2 Participant Guide

There is a separate Participant Guide for each of the four DM/LM VILT sessions. This Participant Guide is for Session 3 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. |

1.3 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.

1.4 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.

1.5 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.

1.6 Course Length

The table below includes a list of all training lessons in the four DM/LM sessions, along with estimated times. Only Session 3 will be covered in today's training and Participant Guide.

Table 2: DM/LM Session 3 of 4 Lessons and Durations

| Lessons | Estimated Time |
|--------------------------------------|----------------|
| Welcome and Introduction | 15 minutes |
| Lesson 1: The Evaluation Process | 15 minutes |
| Lesson 2: Course Feedback Surveys | 70 minutes |
| Lesson 3: Adding Pre- and Post-Tests | 25 minutes |
| Lesson 4: Follow-Up Surveys | 30 minutes |
| Lesson 5: User Survey Completion | 20 minutes |
| Lesson 6: Evaluation Reports | 20 minutes |

Total: 3 hours, 15 minutes

2.0 Domain Manager and Learning Manager Training Session 3 of 4

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 meeting 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 1: VA TMS Domain Manager and Learning Manager Course:
Session 3 of 4

Welcome


Welcome to Session 3 of the VA TMS Domain Manager and Learning Manager 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 Introductions

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

PARTICIPANT GUIDE

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




Slide 4: Participant Introductions

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

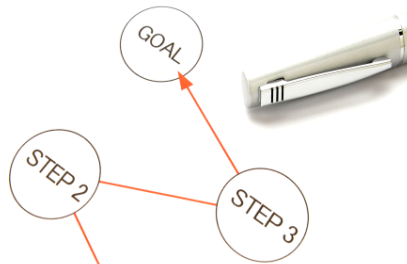
Logistics

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 phone and do not put the call on hold at any time during the training.

COURSE GOALS

Provide instruction and interactive practice of the core concepts and administrative functions of the VA TMS specific Domain Manager and Learning Manager job functions.



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 Domain Manager and Learning Manager job functions.

Slide 6: Course Goal

COURSE STRUCTURE

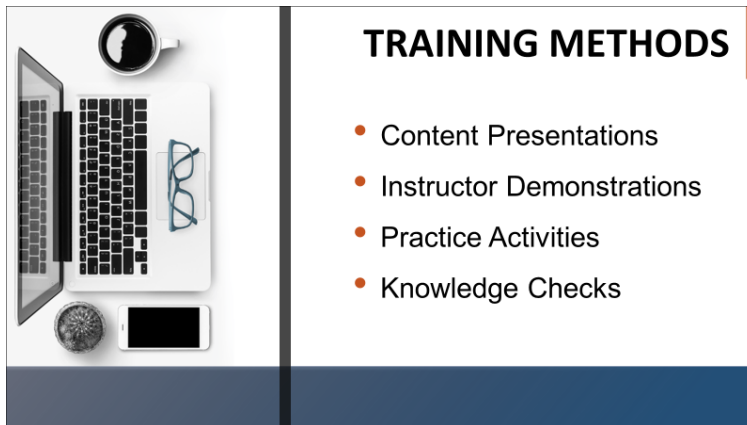
- Four separate web conferencing sessions
- Each no longer than 4 hours in length
- Each session organized into lessons and topics



Course Structure

The DM/LM VILT consists of four web-conferencing sessions, each no longer than four hours. Each session is organized into lessons and topics.

Slide 7: Course Structure



TRAINING METHODS

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

Slide 8: Training Methods

Training Methods

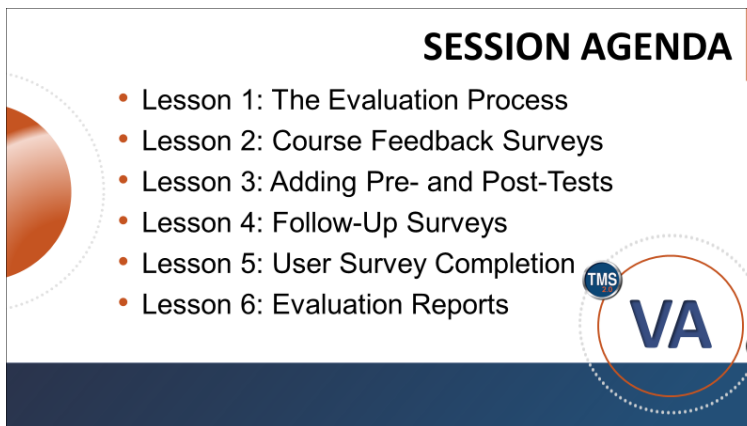
Although there will be session-specific variations, each VILT session will include the following training methods:

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 multiple-choice/true-false knowledge checks.



SESSION AGENDA

- Lesson 1: The Evaluation Process
- Lesson 2: Course Feedback Surveys
- Lesson 3: Adding Pre- and Post-Tests
- Lesson 4: Follow-Up Surveys
- Lesson 5: User Survey Completion
- Lesson 6: Evaluation Reports

Slide 9: Session 3 Agenda

Session 3 Agenda

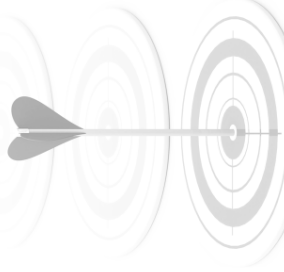
This session is about evaluating learning in the VA TMS. Session 3 is organized into the following lessons:

- Lesson 1: The Evaluation Process
- Lesson 2: Course Feedback Surveys
- Lesson 3: Adding Pre- and Post-Tests
- Lesson 4: Follow-Up Surveys
- Lesson 5: User Survey Completion
- Lesson 6: Evaluation Reports

SESSION OBJECTIVES

After completing this session, you will be able to:

- Describe the process for assessing effectiveness of items
- Describe the process for assessing user learning
- Run training evaluation reports



Session 3 Objectives

After completing this session, you will be able to:

- Describe the process for assessing effectiveness of items
- Describe the process for assessing user learning
- Run training evaluation reports

Slide 10: Session 3 Objectives

QUESTIONS?

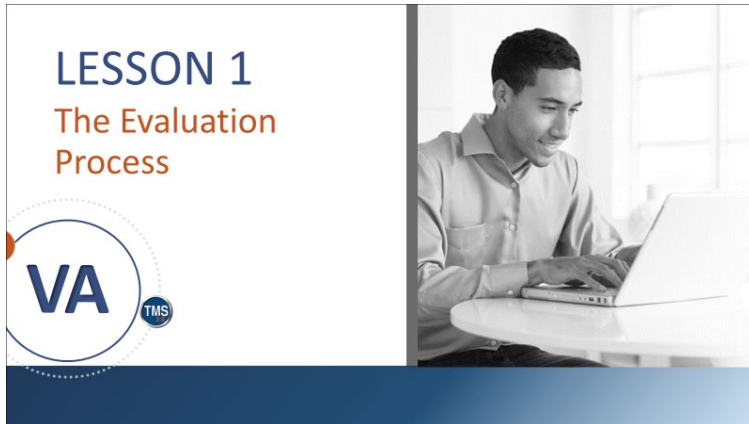


Questions?

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.

Slide 11: Questions?

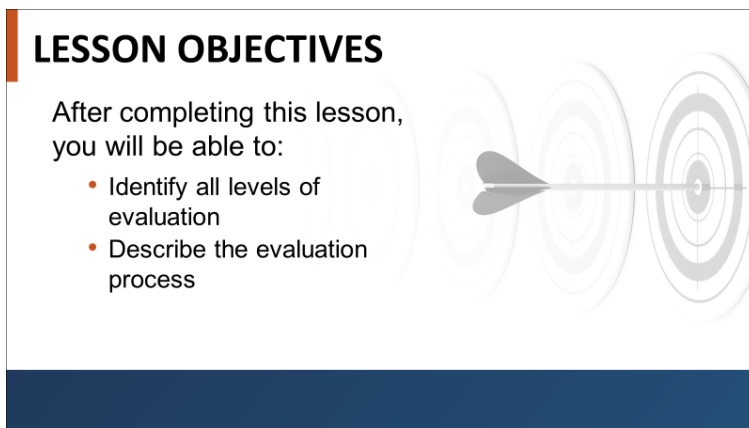
2.2 Lesson 1: The Evaluation Process



Slide 12: Lesson 1: The Evaluation Process

Lesson 1: The Evaluation Process

Lesson 1 introduces the evaluation process. Let's look at the learning objectives for Lesson 1.



Slide 13: Lesson 1 Objectives

Lesson 1 Objectives

After completing this lesson, you will be able to:

- Identify levels of evaluation
- Describe the evaluation process

Notes: _____

Kirkpatrick's Evaluation Model

The four levels of Kirkpatrick's Evaluation Model measure are:

- Level 1: Student Reaction
- Level 2: Learning
- Level 3: Behavior
- Level 4: Results

Slide 14: Kirkpatrick's Evaluation Model

Kirkpatrick's Evaluation Model

The final step in any training program is summative evaluation. A summative evaluation is the assessment of the *outcome* of the training. What did the participant learn? What did they retain? A formative evaluation is a way of judging the worth or *value* of the program.

The four levels of Kirkpatrick's Evaluation Model measure:

- Level 1: Student Reaction
- Level 2: Learning
- Level 3: Behavior
- Level 4: Results

Notes: _____

Steps to Implement the Model

1. Identify training program(s) (item) to be evaluated.
2. Create survey to capture users' reactions to the training.
3. Create pre- and post-exams in Assessments.
4. Create survey to follow-up on behavioral change or application of learning after the training.
5. Associate the surveys and assessments to an item.
6. Assign learning needs to users.
7. User completes survey(s) upon completion of item.
8. Run report(s) to analyze results.

Slide 15: Steps to Implement the Model

Steps to Implement the Model

With the training evaluation tool in the VA TMS, an admin can create surveys to support a course feedback and follow-up evaluation.

Using the Assessments tool to create pre- and post-exams rounds out the necessary tools in the VA TMS to fully support the implementation of the first three levels of a training evaluation model.

The 8 steps needed to implement the Kirkpatrick Model are:

1. Identify training program(s) (item) to be evaluated.
2. Create survey to capture users' reactions to the training.
3. Create pre- and post-exams in Assessments.
4. Create survey to follow-up on behavioral change or application of learning after the training.
5. Associate the surveys and assessments to an item.
6. Assign learning needs to users.
7. User completes survey(s) upon completion of item.
8. Run report(s) to analyze results.

Notes: _____

Preconfigured Requirements

Item Record:

- Must exist before survey can be associated

Exams:

- Created using the Assessments tool
- Pre- and post-exams created ahead of time

Completion Status Configuration:

- Review and revise ahead to allow for follow-up surveys

Rating Scales:

- Establish at least two different rating scales before creating surveys

Slide 16: Preconfigured Requirements

Preconfigured Requirements

Preconfigured requirements are all the things that need to be considered before creating an evaluation — these things need to be configured within the system.

The ability to support a training evaluation model within the VA TMS relies on some pre-configured entities.

- **Item Record:** An item must exist in the VA TMS; surveys are associated with item records.
- **Exams:** The pre- and post-exams used for a learning evaluation are exams created using the Assessments tool. An exam must be online and available to be used as a pre-or post-exam.
- **Completion Status Configuration:** Review, or create, completion status references. For each completion status, there is an option to include learning events with this completion status for course feedback and/or follow-up surveys. For example, the completion status of Read and Acknowledged is not eligible for a follow-up survey assignment
- **Rating:** Establish at least two rating scales; one could be an agreement scale for the course feedback survey, and the second rating scale could be a frequency scale used for a follow-up evaluation survey.

Notes: _____

Sample Rating Scales

Commonly used five-point rating scale (evaluation):

| Does not apply | Strongly disagree | Disagree | Neither agree nor disagree | Agree | Strongly agree |
|----------------|-------------------|----------|----------------------------|-------|----------------|
| 0 | 1 | 2 | 3 | 4 | 5 |

Commonly used follow-up evaluation five-point rating scale:

| Never | Seldom | Mostly | Frequently | Always |
|-------|--------|--------|------------|--------|
| 1 | 2 | 3 | 4 | 5 |

Slide 17: Sample Rating Scales

Sample Rating Scales

Rating scale questions can be used with surveys. It is recommended when implementing course feedback and follow-up surveys to use at least two applicable rating scales.

To continue the example from the last slide, the first rating scale could be a five-point agreement scale used for a course feedback survey. The second rating scale could be a frequency scale used for a follow-up survey.

What is the final step in any training program?

- a) Analysis
- b) Development
- c) Formative Evaluation
- d) Summative Evaluation



KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature.

What is the final step in any training program?

- a) Analysis
- b) Development
- c) Formative Evaluation
- d) Summative Evaluation

Slide 18: Knowledge Check

Notes: _____



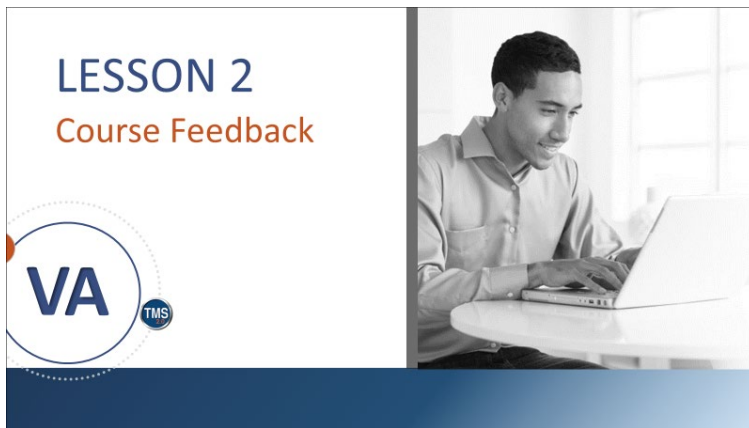
Slide 19: Questions?

Questions?

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

Notes: _____

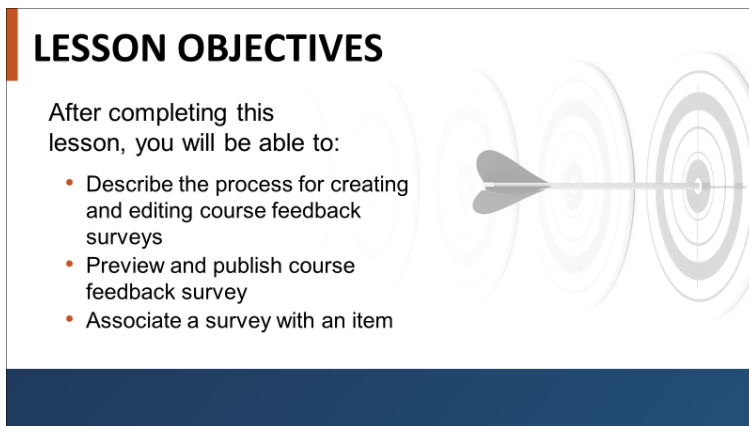
2.3 Lesson 2: Course Feedback



Slide 20: Lesson 2: Item Evaluation Surveys

Lesson 2: Item Evaluation Surveys

Lesson 2 introduces the course feedback process. Let's look at the learning objectives for Lesson 2.



Slide 21: Lesson 2 Objectives

Lesson 2 Objectives

After completing this lesson, you will be able to:

- Describe the process for creating and editing course feedback surveys
- Preview and publish course feedback survey
- Associate a survey with an item

Notes: _____

Course Feedback Survey

- A course feedback survey is a questionnaire survey that is built to assess a user's reaction to a training event.
- Questions asked on a typical course feedback survey cover the basics of a course and can be grouped according to focus area.



Slide 22: Course Feedback Survey

Course Feedback Survey

A course feedback survey is a questionnaire that is built to assess a user's reaction to a training event. It is typically most effective if delivered immediately after the training event ends when a user's reaction is still fresh in his or her mind.

Questions asked on a typical course feedback survey cover the basics of a course and can be grouped according to focus areas, such as instructor or materials.

In its simplest form, course feedback measures how well users liked the training.

Sample Focus Areas

- General Feedback
- Materials
- Instructor
- Goals of Program Met

Slide 23: Sample Focus Areas

Sample Focus Areas

Questions asked on a typical course feedback survey cover the basics of a course and can be grouped according to focus areas.

For example, one set of questions might be related to the effectiveness of the instructor, and another set of questions might inquire about the usefulness of the materials.

Because this type of evaluation is so easy and inexpensive to administer, it is conducted in many organizations, including the VA.

Within the VA TMS, a course feedback survey can be structured with one or more pages and one or more questions per page.

Notes: _____

Types of Questions

- Relevance of the objectives
- Ability of the course to maintain interest
- Number and appropriateness of interactive exercises
- Ease of navigation
- Perceived value and transferability to the workplace

Slide 24: Types of Questions

Types of Questions

This type of evaluation can reveal valuable data if the questions asked are more complex. For example, this questionnaire could move beyond how well the users liked the training to questions about:

- Relevance of the objectives
- Ability of the course to maintain interest
- Appropriateness of interactive exercises
- Ease of navigation
- Perceived value and transferability to the workplace

Notes: _____

Four Question Types

1. Rating Scale:
 - Use for quantitative results
2. One Choice:
 - Use when you want the user to choose one answer from a group
3. Multiple Choice:
 - Use when you want the user to be able to choose multiple answers
4. Open Ended:
 - Use when you want the user to type an answer

Slide 25: Four Question Types

Four Question Types

When building your course feedback survey, you must create questions and answer choices. There are four types of questions:

- **Rating Scale:** Use this question type when you want to get quantitative results.
- **One Choice:** Use this question type when you want the user to choose one answer from a group. The choices appear next to radio buttons.
- **Multiple Choice:** Use this question type when you want the user to be able to choose multiple answers from a group. The choices appear next to checkboxes.
- **Open-Ended:** Use this question type when you want the user to type an answer (up to 3,990 characters).

NOTE: You are encouraged to use the same rating scale per question throughout a survey to provide a mean score across the entire survey.

It is important to keep in mind the type of training event the survey is used to assess. Ensure that the questions being asked are applicable and relevant. For example, a set of questions on how well an instructor kept the class engaged might not apply to an online course.

Notes: _____



Slide 262: Demonstration: Creating a Survey

Demonstration: Creating a Survey

Now the instructor will demonstrate how to create a course feedback survey.

Notes: _____



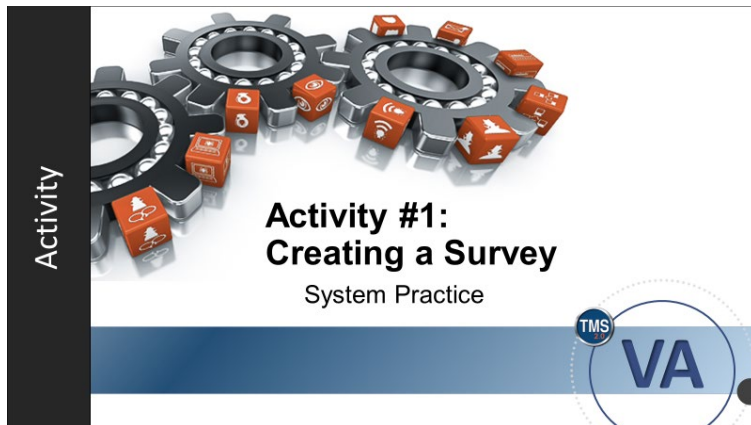
Demonstration: Creating a Survey

1. Navigate to **Content > Surveys**.
 2. Select **Add New**.
 3. Enter a survey ID.
 4. Enter a survey name.
 5. Select an evaluation level (for this example, select **Course Feedback**).
 6. Enter survey description.
 7. Enter comments.
 8. Select a **security domain** (OHRA).
 9. Ensure **Active** checkbox is selected.
 10. Select **Add**.
 11. Select the **Questions** tab.
 12. Enter survey instructions. These are the general instructions for how you want the user to move through the survey.
 13. Enter first page title. This doubles as an indication of your chosen focus area.
 14. Enter first page instructions.
 15. Select **Add Question** icon (Page with red question mark and green plus sign).
 16. Enter question stem.
 17. Select question type (rating scale).
 18. Select a rating scale.
 19. Select the delete icon (garbage can) to delete either the question or an answer.
 20. Repeat steps 15–18 to add additional questions.
- Note:** You can use the **Green Plus** icon to add additional Answer Choices for each question on Multiple Choice and One Choice type questions. You can also use the **Open/Close** page icon to expand/collapse each page to view all questions.
21. Select the **Add Page** icon (Page with blue plus sign).
 22. Enter second page title.
 23. Enter second page instructions.

Notes: _____

24. Select **Add Question** icon.
25. Enter question stem.
26. Select question type (rating scale).
27. Select a rating scale.
28. Repeat steps 23–26 to add additional questions.
29. Demonstrate moving questions to a different page. Select the **Move Question** icon.
30. From the dropdown box, select where to move the question.
31. Select Move.
32. Select the up/down arrows to rearrange questions on a page.
33. Select **Save Draft**.

Notes: _____



Slide 27: Activity #1: Creating a Survey

Activity #1: Creating a Survey

Now you will have an opportunity to create a survey 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 #1: Create a Survey

Please read through the scenario and use the information provided to create a survey.

Scenario:

An online course on how to deal with customers, conflict, and confrontation has been created. You are responsible for creating the course feedback survey to be assigned to all users immediately after the course is completed. This is the general course evaluation survey to be used after every online HR course.

Each question will be a rating scale type using the five-point scale (as demonstrated).

The comments question at the end of each page is an open-ended question type.

Note: This data will be used to complete the next activity.

Information:

Survey Instructions: Please help us improve our quality. Your feedback is important to us. Complete the survey to the best of your ability.

Page 1 Title: General Course Feedback (question type: rating scale).

Page 1 Instructions: Please complete the following questions to the best of your ability.

- The training was relevant to my job.

Page 2 Title: Training Materials Feedback (question type: same rating scale as above).

Page 2 Instructions: Please complete the following questions to the best of your ability.

- The visual aids were accurate and of satisfactory quality.

Page 3 Title: Online Instructions (question type: same rating scale as above).

Page 3 Instructions: Please complete the following questions to the best of your ability.

- The directions on how to use the online course were communicated effectively.

Page 4 Title: Training Methods Feedback (question type: same rating scale as above).

Page 4 Instructions: Please complete the following questions to the best of your ability.

- The right information was covered at the right speed for me.

Actions:

1. Navigate to **Content > Surveys**.
2. Select **Add New**.

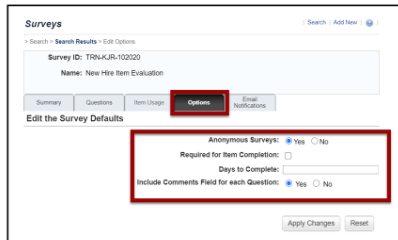
Notes: _____

3. Enter a survey ID and name.
4. Select an evaluation level (for this example, select **Course Feedback**).
5. Enter survey description.
6. Enter comments.
7. Select a **security domain** (OHRA)
8. Check **Active** checkbox.
9. Select **Add**.
10. Select the **Questions** tab.
11. Enter survey instructions.
12. Enter first page title and instructions.
13. Select **Add Question** icon.
14. Enter question stem.
15. Select question type (rating scale).
16. Select a rating scale.
17. Select the **Add Question** icon.
18. Enter "Please leave any comments or suggestions you have" in the **Questions** field.
19. Select **Open Ended** from the Question Type dropdown list.
20. Select **Add Page** icon.
21. Repeat steps 12-20 for each page mentioned in the **Information** section at the beginning of this activity.
22. When all pages have been completed, select **Save Draft**.

Notes: _____

Configuration Options

- Anonymous completion
- Completion required to move to Learning History
- Required-By date
- A comments section can be added after each question for additional feedback



Slide 28: Configuration Options

Configuration Options

Each course feedback survey can be configured uniquely. A survey can be configured to be submitted anonymously by users.

This prevents an administrator from accessing reports from identifying certain feedback from a specific user.

A survey can be required for item completion, causing the item to sit in a pending state until the survey has been completed and submitted by the user, at which time the item will be moved to the user's Completed Work. This also makes all questions within the survey required. The opposite is also true. If the survey is not set to required, all questions are optional.

To ensure there is a defined period in which users should submit feedback, a configurable number of days can be entered to determine a date by which the user should complete and submit the survey. If the user does not complete the survey in the timeframe configured, the survey will move into an overdue status. However, even though the survey is considered overdue, the user can still open, complete, and submit the survey.

The admin can remove course feedback and follow-up surveys from user records, which is especially useful for overdue surveys. This can be done by accessing the Surveys tab of the user record or using the Manage Assignments tool.

Notes: _____

A comments section can be added after each question for additional feedback per question.

Notes: _____

Notifications

Surveys | Search | Add New

Survey ID: TRN-KJR-102020
Name: New Hire Item Evaluation

Summary | Questions | Item Usage | Options | **Email Notifications**

Edit Survey Email Notifications

Edit the Survey Email Notification
Use Editor Content When Sending Email Notification: ☒ **Search Content**

User:

Other:

Body:

Attachment for Survey Email Notification

Current Attachment:

New Attachment: No file chosen

Slide 29: Notifications

Notifications

The notification template associated with the survey functionality is the Survey Notification Email Template

A user is sent a notification upon the assignment of a survey. (It is recommended to embed a questionnaire survey direct link into the notification template to generate an actual link within the email).

A course feedback survey is assigned to a user upon completion of an item (a learning history is recorded).

A follow-up survey is assigned to a user and/or the user's manager in a configurable number of days after item completion and is triggered by an Automatic Process Manager (APM).

To edit the survey, an admin can use the Launch Editor feature. Like other notification areas in the VA TMS, an administrator can also attach a document to notifications.

Notes: _____

Item Usage

| Item | Assigned | Completions | Percentage | Mean Score |
|----------------------------------------------------------|----------|-------------|------------|------------|
| VA 4494945 (Rev 1 - 2/21/2019 08:04 AM America/New York) | 221 | 212 | 95.93 | N/A |
| VA 4508489 (Rev 1 - 5/7/2019 08:56 AM America/New York) | 192 | 183 | 95.31 | N/A |

Slide 30: Item Usage

Item Usage

From the survey record's Item Usage, an admin can view the number of users assigned who have completed the item and been assigned to the survey, the number of completed surveys, the percentage of assigned surveys that have been completed, and a mean score for the survey results.

The mean score is the average of all the rating scale question responses across all completed surveys for that item.

For each item associated with the survey, the system calculates the mean score only if, for all surveys completed for that item, all the rating scale type questions use the same rating scale as specified in the Rating Scale field.

Notes: _____

Preview and Publish

- Once created, preview the draft survey before publishing it.
- Once a survey is published, it can be associated with one or more items.

Slide 31: Preview and Publish

Preview and Publish

Once a survey has been created and configured, it is important to preview the draft survey before publishing and making it available for use.

From the **Questions** tab, select the **Preview** button and select **Draft** for an option to preview the draft version of the survey.

Once you have reviewed your questions and layout, close the preview and return to the **Questions** tab.

Select the **Publish** button to officially publish and make this survey available. Once a survey is published, it can be associated with one or more items.

DEMONSTRATION



Configuring, Previewing, and Publishing Surveys



Slide 32: Demonstration: Configuring, Previewing, and Publishing Surveys

Demonstration: Configuring, Previewing, and Publishing Surveys

Now the instructor will demonstrate how to configure, preview, and publish a survey.

Notes: _____



Demonstration: Configuring, Previewing, and Publishing Surveys

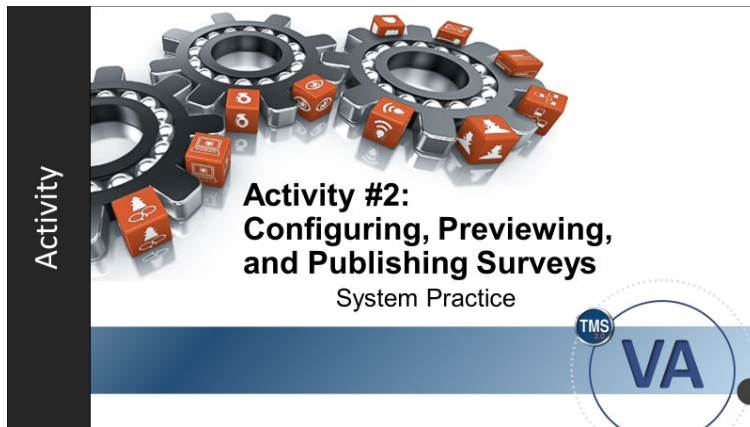
Configuring Surveys:

1. Access the survey record you created in the previous activity. If you've navigated away from the survey, go to **Content > Surveys** and use the search filters to find your survey.
2. Select the **Options** tab.
3. Select **Yes** for anonymous surveys.
4. Check the **Required for Item Completion** checkbox.
5. Enter the number of days to complete survey from assignment.
6. Select **Yes** to include comments field for each question.
7. Select **Apply Changes**.
8. Select the **Email Notifications** tab.
9. Display and explain the **Attachment for Survey Email Notification** area. Note, only one attachment is allowed at a time.
10. Select the **Launch Editor** link.
11. If necessary, edit the template of the notification message. Adjust the message and add any token.
12. Select the **Save** button.
13. Exit the Email Notification Template Editor page.
14. Select the **Use Editor Content When Sending Email Notification** checkbox.
15. Select **Apply Changes**.

Previewing and Publishing Surveys:

1. Select the **Questions** tab.
2. Select **Preview**.
3. Select **Draft** from the dropdown menu.
4. Review the survey pages and questions.
5. Select **Close** to close the preview of the survey.
6. Select **Publish**. The survey is now ready for use.

Notes: _____



Slide 33: Activity #2: Configuring, Previewing, and Publishing Surveys

Activity #2: Configuring, Previewing, and Publishing Surveys

Now you will have an opportunity to configure, preview, and publish a survey. 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: Configuring, Previewing, and Publishing Surveys

Configuring Surveys:

1. Access the survey record you created in the previous activity. If you've navigated away from the survey, go to **Content > Surveys** and use the search filters to find your survey.
2. Select the **Options** tab.
3. Select **Yes** for anonymous surveys.
4. Check the **Required for Item Completion** checkbox.
5. Enter the number of days to complete survey from assignment.
6. Select **Yes** to include comments field for each question.
7. Select **Apply Changes**.
8. Select the **Email Notifications** tab.
9. Select the **Launch Editor** link.
10. If necessary, edit the template of the notification message. Adjust the message and add any token.
11. Select the **Save** button.
12. Exit the Email Notification Template Editor page.
13. Select the **Use Editor Content When Sending Email Notification** checkbox.
14. Select **Apply Changes**.

Previewing and Publishing Surveys:

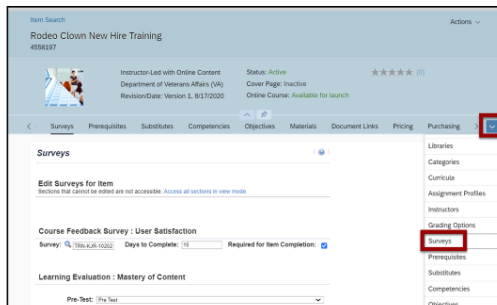
1. Select the **Questions** tab.
2. Select **Preview**.
3. Select **Draft** from the dropdown menu.
4. Review the survey pages and questions.
5. Select **Close** to close the preview of the survey.
6. Select **Publish**. The survey is now ready for use.



Job Aid available on the TMS Resource site

Notes: _____

Associate the Survey



Associate a survey from within an item:

- Related Area > More > Surveys tab

Associate the Survey

Associating a survey with an item is the next step. An association between the item and a survey can be created within an item record from the Surveys tab.

The proper pathway to associate a survey to an Item record is **Related Area > More > Surveys** tab.

Slide 34: Associate the Survey

One Survey of Each Type Per Item

- It is only possible to associate one survey of each type (Course Feedback Survey, Pre/Post-Exam, Follow-Up Survey) to an item.
- The same survey can be associated to many items.

One Survey of Each Type Per Item

It is only possible to associate one survey of each type (Course Feedback Survey, Pre/Post-Exam, Follow-Up Survey) per item.

However, the same survey can be associated to many items.

This means you cannot create separate surveys of the same type for users and managers, for example. One way around this is to split the survey into two pages – one to be completed by users and one to be completed by managers.

Slide 35: One Survey of Each Type Per Item

Notes: _____



Slide 36: Demonstration: Associate the Survey

Demonstration: Associate the Survey

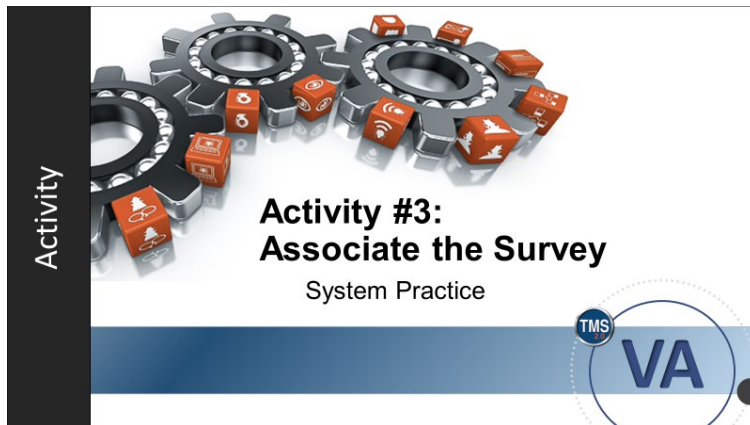
Now the instructor will demonstrate how to associate the survey.

Notes: _____

***Demonstration: Associate the Survey***

1. Navigate to **Learning Activities> Items**.
2. Enter search criteria for the item to which you want to associate a survey. (Select an item from the TRAIN security domain).
3. Select **Search**.
4. Select the item from the search results.
5. Select **More** in the Related area of the item record.
6. Select the **Surveys** tab.
7. Select the **Survey** magnifying glass.
8. Enter search criteria for the survey you want to locate.
9. Select **Search**.
10. Choose the **Select** link next to a survey from the search results.
11. Select **Apply Changes**.
12. Depending on how the survey was configured, the Days to Complete field and the Required for Completion checkbox may or may not be auto-filled. If necessary, enter or change these fields.
13. If any changes are made, select **Apply Changes** to save your modifications.

Notes: _____



Slide 37: Activity #3: Associate the Survey

Activity #3: Associate the Survey

Now you will have an opportunity to practice associating a survey to an item.

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 #3: Associate the Survey**

1. Navigate to **Learning Activities> Items**.
2. Enter search criteria for the item to which you want to associate a survey. (Select an item from the TRAIN security domain).
3. Select **Search**.
4. Select the item from the search results.
5. Select **More** in the Related area of the item record.
6. Select the **Surveys** tab.
7. Select the **Survey** magnifying glass.
8. Enter search criteria for the survey you want to locate.
9. Select **Search**.
10. Choose the **Select** link next to a survey from the search results.
11. Select **Apply Changes**.
12. Depending on how the survey was configured, the Days to Complete field and the Required for Completion checkbox may or may not be auto-filled. If necessary, enter or change these fields.
13. If any changes are made, select **Apply Changes** to save your modifications.



Job Aid available on the TMS Resource site

Notes: _____

Within an Item Record, where can you associate a survey with an item?



- a) Related Area > More > Surveys
- b) Actions Area > Schedule
- c) Related Area > Prerequisites
- d) None of the above

KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature.

Within an Item Record, where can you associate a survey with an item?

- a) Related Area > More > Surveys
- b) Actions Area > Schedule
- c) Related Area > Prerequisites
- d) None of the above

Slide 38: Knowledge Check

If a course feedback survey is already associated with an item, _____.



- a) a second survey can be associated with the item after a set date
- b) a warning message will appear upon attempts to associate additional surveys with the item, BUT the warning message can be overridden with the correct password
- c) additional surveys can be associated with the item at any time
- d) the system will not allow two course feedback surveys to be attached at the same time

KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat feature.

If a course feedback survey is already associated with an item, _____.

- a) a second survey can be associated with the item after a set date.
- b) A warning message will appear upon attempts to associate additional surveys with the item, BUT the warning message can be overridden with the correct password.
- c) additional surveys can be associated with the item at any time.
- d) the system will not allow two course feedback surveys to be attached at the same time

Slide 39: Knowledge Check

Notes: _____



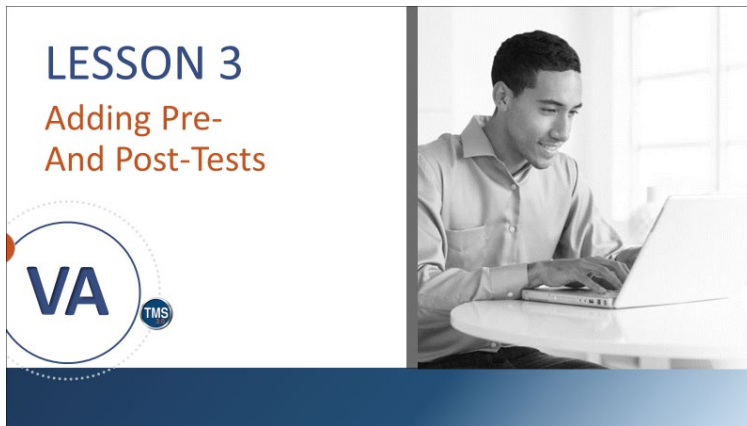
Slide 40: Questions?

Questions?

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

Notes: _____

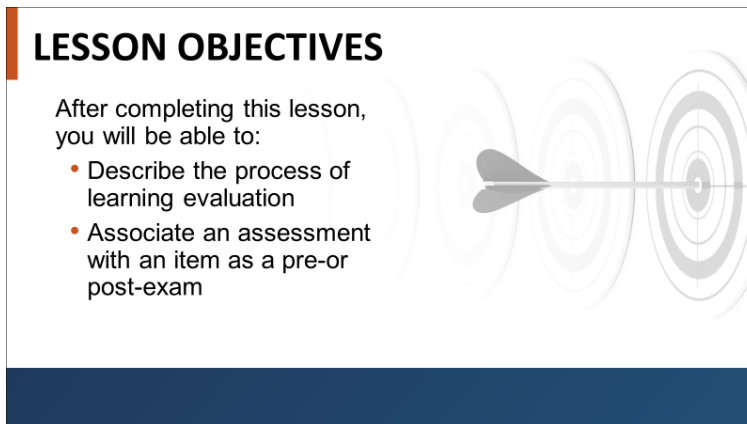
2.4 Lesson 3: Adding Pre- and Post-Tests



Slide 41: Lesson 3: Adding Pre- and Post-Tests

Lesson 3: Adding Pre- and Post-Tests

Lesson 3 introduces learning evaluations. Let's look at the learning objective for Lesson 3.



Slide 42: Lesson 3 Objectives

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Describe the process of learning evaluation
- Associate an assessment with an item as a pre- or post-exam

Notes: _____

Learning Evaluation

- The purpose of pre- and post-exams is to assess the user's knowledge of the content prior to the training and then just after the training.
- Questions for exams are created using the TMS Assessments tool.
- Best practice is to associate questions with objectives.



Slide 43: Learning Evaluation

Learning Evaluation

Configuring an item to support learning evaluations is simple if the exams to be used as pre- and post-exams have already been created. They must be online and available.

Although it is optional to associate objectives with questions using the Assessments tool, it is highly encouraged to use this methodology when creating questions to be used in pre- and post-exams that are part of an evaluation model.

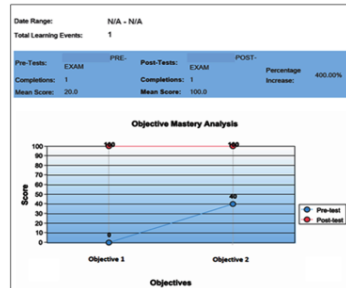
Learning evaluation reports display results per objective; however, this information is not available if the questions are not tied to objectives.

Setting up objectives, and thus question pools, must be completed outside of exam creation. If questions are created within exam creation, an objective cannot be added to the question.

Notes: _____

Sample Learning Evaluation Report

- If the training program is effective, there will be a demonstrative increase in knowledge when the two exam results are compared.



Slide 44: Sample Learning Evaluation Report

Sample Learning Evaluation Report

The purpose of including a pre- and post-exam is to assess the learners' knowledge of the content prior to the training and then just after the training.

If the training program is effective, ideally, there will be a demonstrative increase in knowledge when the two exam results are compared. This can only be reported with the use of objectives.

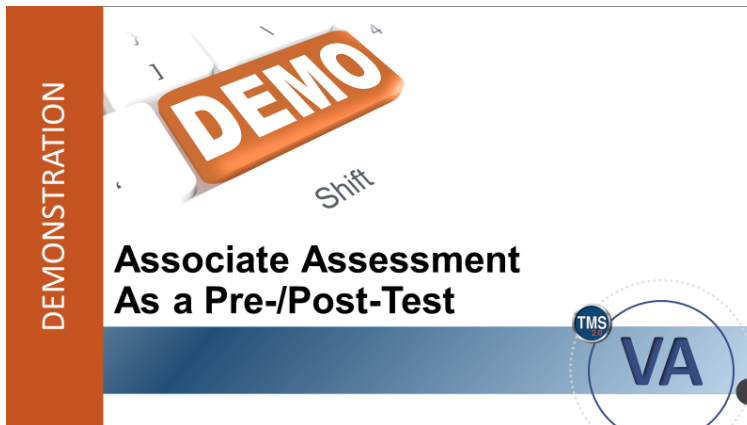
An item's original classification may change when configuring to support a learning evaluation.

If the item is Online Only, associating one or more exams does not affect the online classification.

If the item is Instructor-Led, associating one or more exams to it will change the classification to Instructor-Led with Online Content (Blended).

Demonstration: Associate Assessment as a Pre-/Post-Test

Now the instructor will demonstrate how to associate an assessment as a pre- or post-test.



Slide 45: Demonstration: Associate Assessment as a Pre-/Post-Test

Notes: _____

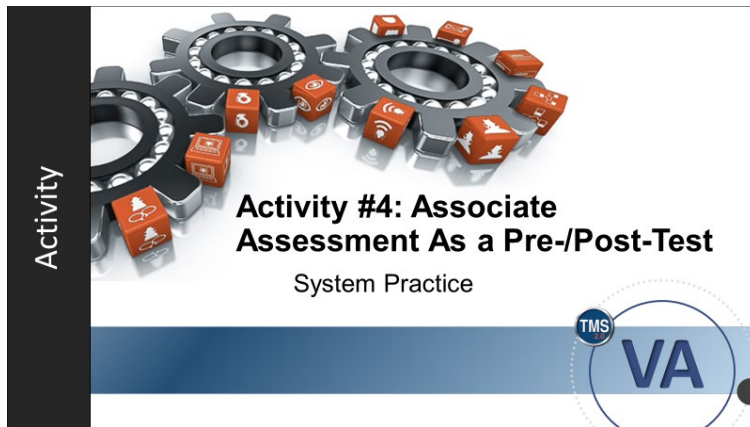
***Demonstration: Associate Assessment as a Pre-/Post-Test***

1. Navigate to **Learning Activities > Items**.
2. Enter search criteria for the item to which you want to associate a survey. (Select an item from the TRAIN security domain).
3. Select **Search**.
4. Select the item from the search results.
5. Select **Online Content** in the Related area of the item record.
6. If there is content already added to the item, select the **More** button at the Root level. If there is no content attached, select the **Add Content Object** dropdown menu.
7. Select **Add Assessment** from the list.
8. Use the Magnifying Glass icon to search for the pre-/post-test to add to the item. **Note:** The assessment you choose must be an Exam. Quizzes cannot be a pre- or post-test.
9. Input an **Assessment Name** in the text box.
10. Select the **OK** button.
11. Select the **Settings** icon (gear icon).
12. From the **Content** tab, ensure **Add to History on Completion of All Content** is set to ON, and select **VA – Complete** from the Completion Status dropdown menu.
13. Select the **Launch** tab.
14. Ensure **Content is available for launch (available for users)** is set to ON.
15. Select the **OK** button.
16. Select the **Save** button at the bottom right portion of the Related area.
17. Add a second assessment to the online content section by following steps 6-10.
18. Select **More** in the Related area.
19. From the dropdown list, select the **Surveys** tab.
20. In the **Learning Evaluation: Mastery of Content** section, select the dropdown menu for **Pre-Test**, and select the desired exam.
21. Select the dropdown menu for **Post-Test** and select the desired exam. **Note:** You will not be able to select the same exam for pre- and post-tests. You must select two different exams.

Notes: _____

22. Select **Apply Changes**.

Notes: _____



Slide 36: Activity #4: Associate Assessment as a Pre-/Post-Test

Activity #4: Associate Assessment as a Pre-/Post-Test

Now you will have an opportunity to associate an assessment as a pre- or post-test.

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 #4: Associate Assessment as a Pre-/Post-Test**

1. Navigate to **Learning Activities > Items**.
2. Enter search criteria for the item to which you want to associate a survey. (Select an item from the TRAIN security domain).
3. Select **Search**.
4. Select the item from the search results.
5. Select **Online Content** in the Related area of the item record.
6. If there is content already added to the item, select the **More** button at the Root level. If there is no content attached, select the **Add Content Object** dropdown menu.
7. Select **Add Assessment** from the list.
8. Use the Magnifying Glass icon to search for the pre-/post-test to add to the item. **Note:** The assessment you choose must be an Exam. Quizzes cannot be a pre- or post-test.
9. Input an **Assessment Name** in the text box.
10. Select the **OK** button.
11. Select the **Settings** icon (gear icon).
12. From the **Content** tab, ensure **Add to History on Completion of All Content** is set to ON, and select **VA – Complete** from the Completion Status dropdown menu.
13. Select the **Launch** tab.
14. Ensure **Content is available for launch (available for users)** is set to ON.
15. Select the **OK** button.
16. Select the **Save** button at the bottom right portion of the Related area.
17. Add a second assessment to the online content section by following steps 6-10.
18. Select **More** in the Related area.
19. From the dropdown list, select the **Surveys** tab.
20. In the **Learning Evaluation: Mastery of Content** section, select the dropdown menu for **Pre-Test**, and select the desired exam.
21. Select the dropdown menu for **Post-Test** and select the desired exam. **Note:** You will not be able to select the same exam for pre- and post-tests. You must select two different exams.

Notes: _____

22. Select **Apply Changes**.



Job Aid available at the TMS Resource Site

Notes: _____

You can assign the same attached assessment as an item's Pre-Test and Post-Test.

- a) True
- b) False



KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat.

You can assign the same attached assessment as an item's Pre-Test and Post-Test.

- a) True
- b) False

Slide 47: Knowledge Check



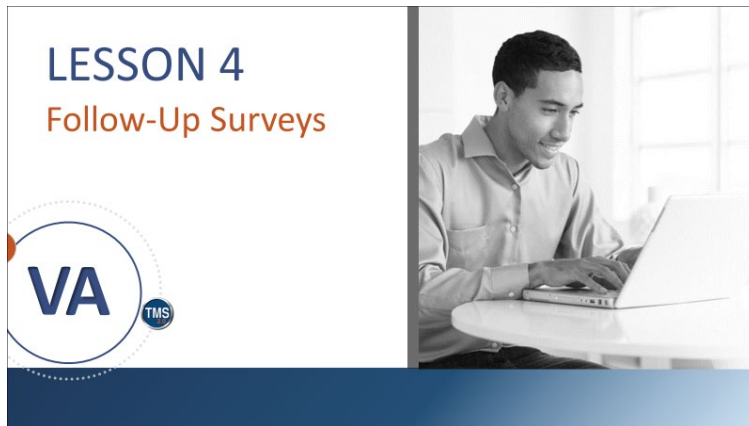
Slide 48: Questions?

Questions?

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

Notes: _____

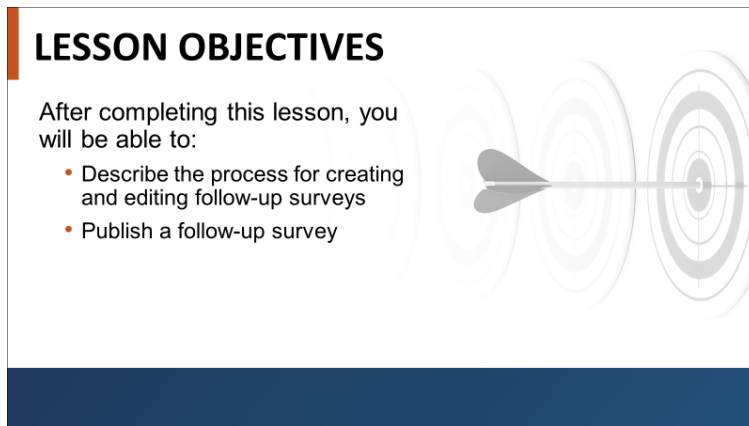
2.5 Lesson 4: Follow-Up Surveys



Slide 49: Lesson 4: Follow-up Surveys

Lesson 4: Follow-Up Surveys

Lesson 4 introduces follow-up surveys. Let's look at the learning objective for Lesson 4.



Slide 50: Lesson 4 Objectives

Lesson 4 Objectives

After completing this lesson, you will be able to:

- Describe the process for creating and editing follow-up surveys
- Publish a follow-up survey

Notes: _____

Follow-Up Survey

- Follow-up surveys attempt to answer whether learners' behaviors actually change as a result of new learning
- Functionally, the creation of a follow-up survey is the same as a course feedback survey

Slide 51: Follow-Up Survey

Follow-Up Survey

Learners typically score well on post-tests, but the real question is whether any of the new knowledge and skills are retained and transferred back on the job.

Follow-up surveys attempt to answer whether learners' behaviors change because of new learning.

Ideally, this measurement is conducted three to six months after the training program. By allowing some time to pass, learners can implement new skills, and retention rates can be checked.

Follow-Up surveys can be completed by the user and/or the user's manager.

In Lesson 2, we created a course feedback survey. For the most part, creating a follow-up survey is the same, though they have two different purposes, and therefore the line of questioning is radically different.

Questions for Follow-Up Surveys

Questions can be reworded from course feedback surveys to best fit the need of the program and evaluation methodology. For example:

Before:

Did the representative **learn** how to open each customer dialogue with a product benefit statement, followed by a request to proceed?

After:

How often in the last month on the job did the representative open each customer dialogue with a product benefit statement, followed by a request to proceed?

Slide 52: Questions for Follow-Up Surveys

Questions for Follow-Up Surveys

Questions can be reworded from course feedback surveys to best fit the need of the program and evaluation methodology. For example, a course feedback survey evaluating a sales training program might seek to answer the following question:

- Did the representative learn how to open each customer dialogue with a product benefit statement, followed by a request to proceed?

These questions can be reworded to best fit the need of the program and evaluation

Notes: _____

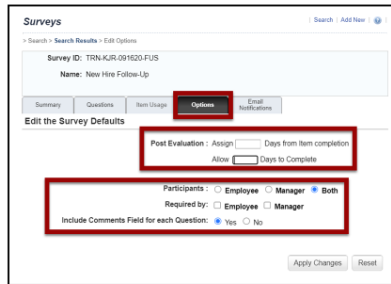
methodology. For example, the same question above may be reworded for use with a rating scale defined by frequency:

- How often in the last month on the job did the representative open each customer dialogue with a product benefit statement, followed by a request to proceed?

Notes: _____

Configuration Options

- The follow-up survey can be assigned to users in a configurable number of days from item completion.
- A follow-up survey can be completed by the user only, the manager only, or both.
- A comments section can be added after each question for additional feedback.



Slide 53: Configuration Options

Configuration Options

Each follow-up survey can be configured uniquely to fit the business needs.

The follow-up survey can be assigned to users in a configurable number of days from completion of the item.

The survey completion date is a configurable number of days from assignment.

A follow-up survey can be completed by the user (employee) only, the manager only, or both.

A comments section can be added after each question for additional feedback per question.

DEMONSTRATION

Create and Configure a Follow-Up Survey



Slide 54: Demonstration: Create and Configure a Follow-Up Survey

Demonstration: Create and Configure a Follow-Up Survey

Now the instructor will demonstrate how to create and configure a follow-up survey.

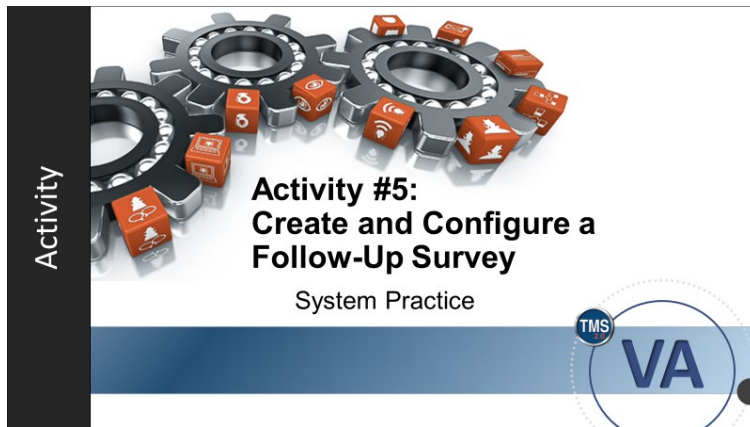
Notes: _____



Demonstration: Create and Configure a Follow-Up Survey

1. Navigate to **Content > Surveys**.
2. Create a Follow-Up Survey using the same process for a Course Feedback Survey, which we learned in Lesson 2.
3. Select the **Questions** tab.
4. Add a simple **Survey Instructions**, **Page Title**, and **Page Instructions**.
5. Select the **Add Question** icon.
6. Insert a **One-Choice** question along with multiple responses.
7. Select **Save Draft**.
8. Select the **Options** tab.
9. To configure the post-evaluation settings, enter a number of days from item completion to assign the follow-up survey and a number of days to complete the survey.
10. Select the follow-up survey participants (employee, manager, or both).
11. Select **Yes** for the option to **include comments field for each question**.
12. Select **Apply Changes**.
13. Select the **Questions** tab.
14. Select **Preview** and then select **Draft** from the dropdown menu.
15. Select **Close** to close preview of the survey.
16. Select **Publish**. The survey is now ready for use.
17. Access the item record used in the earlier demonstration from your **Recents**.
18. Select the **More** button in the Related Area, and choose the **Surveys** tab.
19. Select the magnifying glass icon in the **Follow-up Survey: Application of Learning** to search your newly created Follow-Up Survey.
20. Select **Apply Changes**.

Notes: _____



Activity #5: Create and Configure a Follow-Up Survey

Now you will have an opportunity to create a follow-up survey.

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 #5: Create and Configure a Follow-Up Survey**

Scenario: When the online course on how to deal with customers, conflict, and confrontation is finished by employees, they will need to complete a follow-up survey. You are responsible for creating the questions for the follow-up survey to be assigned to all users. Use the information provided in the training and this scenario to configure the survey options.

Using the previous labs in this course as a guide, complete the following tasks on your own: Create a follow-up survey using the sample questions below. Also, add an open-ended question as a comments field for each page.

Information:

Survey Instructions: Please complete this survey to the best of your ability regarding your capabilities in dealing with confrontation and difficult people, before the training and after.

Page 1 Title: Before Training

Page 1 Instructions: A lot of people cannot handle confrontation. They shake and lose control of their voice pitch and cannot control their thoughts properly. It can be frustrating when someone is putting you down, and you can't argue back because you have confrontation jitters. This is the "fight or flight" response kicking in, and it pumps adrenaline throughout your body in readiness to fight or in readiness to run.

Answer these questions to see how you used to deal with confrontation before the training you received.

1. Before this training course, how often did you take a deep breath just before a confrontational situation or during it if necessary? This lowers your heartbeat and blood pressure.
2. Add an open-ended type question for comments from the user

Page 2 Title: After Training

Page 2 Instructions: A lot of people cannot handle confrontation and start to shake; they lose control of their voice pitch and cannot control their thoughts properly. It can be frustrating when someone is putting you down, and you can't argue back as you have a touch of confrontation jitters. This is the "fight or flight" response kicking in, and it pumps adrenaline throughout your body in readiness to fight or in readiness to run.

Answer these questions to see how well you now deal with confrontation since the training you received.

1. Since this training course, how often do you currently take a deep breath just before a confrontational situation or during it if necessary? This lowers your heartbeat and blood pressure.

Notes: _____

2. Add an open-ended type question for comments from the user

Notes: _____

Follow-up surveys should be administered within the first week after training.

- a) True
- b) False



KNOWLEDGE CHECK

Knowledge Check

Answer the following question using the chat.

Follow-up surveys should be administered within the first week after training.

- a) True
- b) False

Slide 56: Knowledge Check



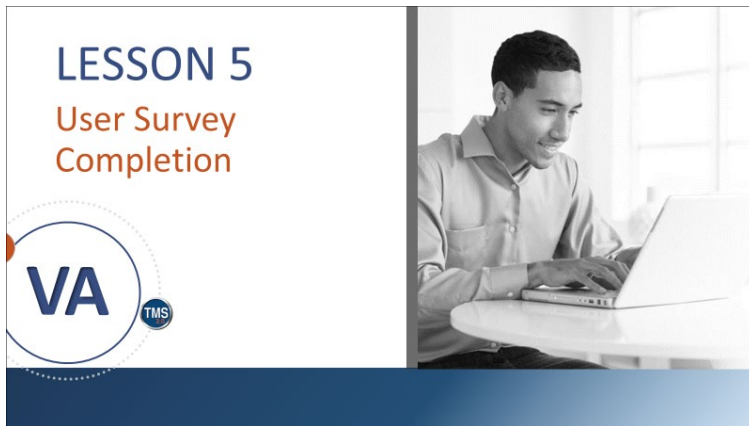
Slide 57: Questions?

Questions?

Does anyone have any questions about this lesson?

Notes: _____

2.6 Lesson 5: User Survey Completion

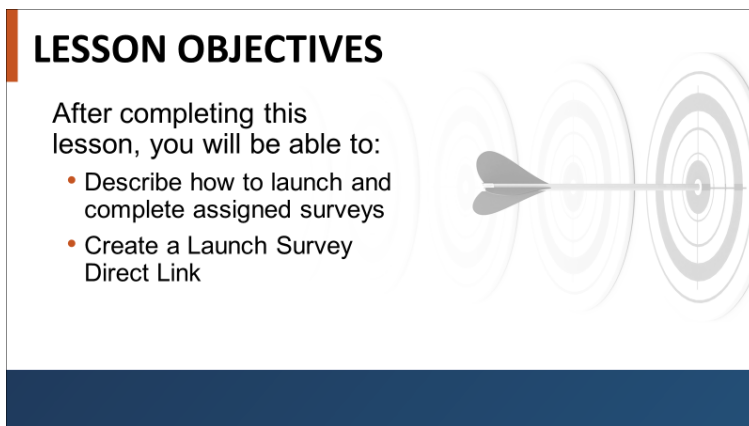


Slide 58: Lesson 5: User Survey Completion

Lesson 5: User Survey Completion

Lesson 5 discusses user survey completion.

Let's look at the learning objective for Lesson 5.



Slide 59: Lesson 5 Objectives

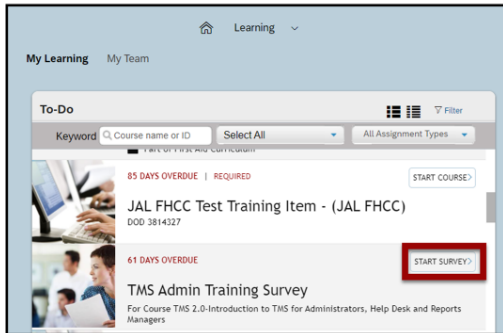
Lesson 5 Objectives

After completing this lesson, you will be able to:

- Describe how to launch and complete assigned surveys
- Create a Questionnaire Survey Direct Link

Notes: _____

Launching a Survey



Slide 60: Survey Completion

Survey Completion

When a survey is assigned to a user, the survey will display in their To-Do List.

When launched, if the survey has been configured to be anonymous, the checkbox at the top of the survey will be inactive.

If the survey is configured to be required for item completion, a warning message displays to the user if he or she had missed or skipped any questions in the survey when submitting.

If the survey is optional (not required for item completion), then the questions within the survey are also considered optional, and the user can omit and skip questions when submitting.

Furthermore, with an optional survey, the user can completely remove the survey from his or her To-Do List, like a self-assigned item.

Notes: _____

Survey Completion

Slide 61: Survey Completion

Survey Completion

To launch the survey, select the Launch Evaluation. You may also select the Return to Content Structure.

When the user gets to the last page of the survey, a Submit button will be available to submit the completed survey.

If a user does not complete the survey, the Save button allows the user to save and complete later.

Once a survey has been submitted, it disappears from the user's view.

There is no record of a survey completion in a user's Learning History.

Survey Direct Links

- Admins may create direct links to Launch Surveys
- This is beneficial when users have not completed a questionnaire survey on their To-Do list.
- Once created the link may be pasted to a reminder email to send to the user.

Slide 62: Survey Direct Link

Survey Direct Link

Occasionally, Users forget to complete evaluations on their My Learning list.

This feature enables administrators to create direct links to surveys. This is beneficial to provide a reminder to users who have not completed a survey on their My Learning list.

Once the link is created, it can be pasted into an email and sent directly to the user. They may select the link and proceed to the survey for completion.

Notes: _____



Slide 63: Demonstration: Launch Survey Direct Link

Demonstration: Launch Survey Direct Link

Now the instructor will demonstrate how to create survey direct links.

Notes: _____



Demonstration: Launch Survey Direct Link

1. Navigate to **System Administration > System Management Tools > Generate Direct Link**.
2. Select the Down Arrow for the **Direct Link Type**.
3. Select the **Launch Survey** option.
4. Leave the **Link Output Format** as URL and **Learning Only Users** as No.
5. Use the Magnifying Glass icon to search for the Item ID.
6. Select the Evaluation Level. The options are **Course Feedback** or **Follow-up Survey**.
7. Select the **Display Link** button. The link is displayed in the window.
8. Copy and paste the link to an email.

Notes: _____



Slide 64: Activity #6: Launch Survey Direct Link

Activity #6: Launch Survey Direct Link

Now you will have an opportunity to create a Launch Survey Direct Link.

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 #6: Launch Survey Direct Link

1. Navigate to **System Administration > System Management Tools > Generate Direct Link**.
2. Select the Down Arrow for the **Direct Link Type**.
3. Select the **Launch Survey** option.
4. Leave the **Link Output Format** as URL and **Learning Only Users** as No.
5. Use the Magnifying Glass icon to search for the Item ID.
6. Select the Evaluation Level. The options are **Course Feedback** or **Follow-up Survey**.
7. Select the **Display Link** button. The link is displayed in the window.
8. Copy and paste the link to an email.

Notes: _____

If a user omits a question during an optional survey and attempts to submit the survey, he or she will receive which of the following:



KNOWLEDGE CHECK

- a) A warning message to complete the question
- b) An asterisk next to the survey in the user's Learning History
- c) An e-mail alerting the user of the omission and instructions explaining how to re-access the survey if necessary
- d) Nothing—the survey will submit as is

Slide 65: Knowledge Check

Knowledge Check

Answer the following question using the chat.

If a user omits a question during an optional survey and attempts to submit the survey, he or she will receive which of the following:

- a) A warning message to complete the question
- b) An asterisk next to the survey in his or her Learning History
- c) An email alerting the user of the omission and instructions explaining how to re-access the survey if necessary
- d) Nothing — the survey will submit as is



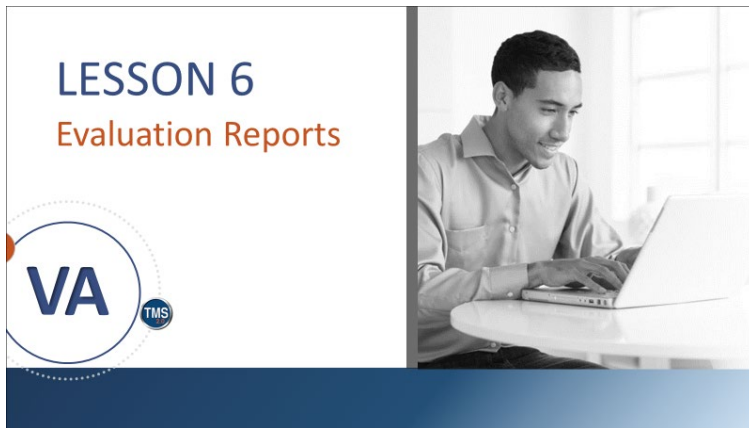
Slide 66: Questions?

Questions?

Does anyone have any questions about this lesson?

Notes: _____

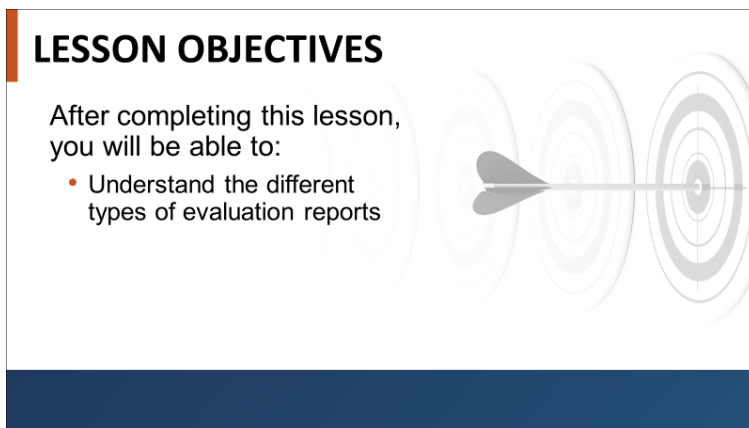
2.7 Lesson 6: Evaluation Reports



Slide 67: Lesson 6: Evaluation Reports

Lesson 6: Evaluation Reports

Lesson 6 explains evaluation reports. Let's look at the learning objective for Lesson 6.



Slide 68: Lesson 6 Objectives

Lesson 6 Objectives

After completing this lesson, you will be able to:

- Understand the different types of evaluation reports

Notes: _____

Evaluation Reports

- Item Evaluation Report
- Survey by Individual Response Report
- Survey Response by Instructor Report
- Learning Evaluation Report
- Follow-Up Survey Report

Slide 69: Evaluation Reports

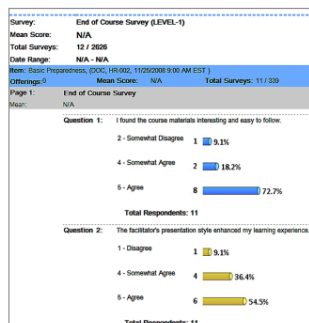
Evaluation Reports

There are specific reports to support analysis of each step of the training evaluation process. These include:

- Item Evaluation Report
- Survey by Individual Response Report
- Survey Response by Instructor Report
- Learning Evaluation Report
- Follow-Up Survey Report

Item Evaluation Report

The Survey by Individual Response Report shows each user's responses to the survey questions.



Slide 70: Item Evaluation Report

Item Evaluation Report

The Item Evaluation Report shows the mean score (the average results of the rating scale questions) for each survey, survey page, and survey question, and the percentage of users who selected each response.

The Survey by Individual Response Report shows each user's responses to the survey questions.

Notes: _____

Survey Response by Instructor Report

The Survey Response by Instructor Report shows the mean score for each survey and survey page grouped according to the instructor.



Slide 71: Survey Response by Instructor Report

Learning Evaluation Report

The Learning Evaluation Report shows the training effectiveness of items based on the average pre-test and post-test mean scores.



Slide 72: Learning Evaluation Report Example

Survey Response by Instructor Report

The Survey Response by Instructor Report shows the mean score (the average results of the rating scale questions) for each survey and survey page, grouped according to the instructor.

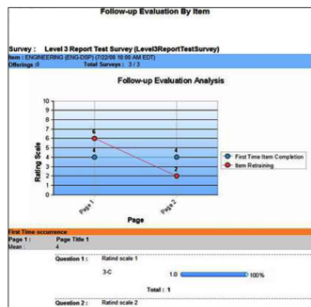
Learning Evaluation Report Example

The Learning Evaluation Report shows the training effectiveness of items based on the average pre-test and post-test mean scores.

Notes: _____

Follow-Up Survey Report

The Follow-Up Survey Report shows the mean score for each follow-up survey, survey page, and survey question.



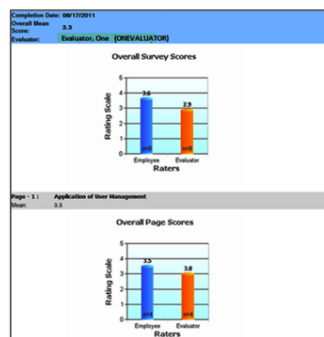
Slide 73: Follow-Up Survey Report

Follow-Up Survey Report

The Follow-up Survey Report shows the mean score (the average results of the rating scale questions) for each follow-up survey, survey page, and survey question.

Follow-Up Survey by Individual Response Report

The Follow-Up Survey by Individual Response Report shows the mean score for each follow-up survey and survey page.



Slide 74: Follow-Up Survey by Individual Response Report

Follow-Up Survey by Individual Response Report

The Follow-up Survey by Individual Response Report shows the mean score (the average results of the rating scale questions) for each follow-up survey and survey page.

Notes: _____

The Learning Evaluation Report shows the training effectiveness of items based on which of the following:



KNOWLEDGE CHECK

- a) Post-test mean scores
- b) Pre-test and post-test mean scores
- c) Pre-test mean scores
- d) The grand mean

Slide 75: Knowledge Check

Knowledge Check

Answer the following question using the chat.

The Learning Evaluation Report shows the training effectiveness of items based on which of the following:

- a) Post-test mean scores
- b) Pre-test and post-test mean scores
- c) Pre-test mean scores
- d) The grand mean



Slide 76: Questions?

Questions?

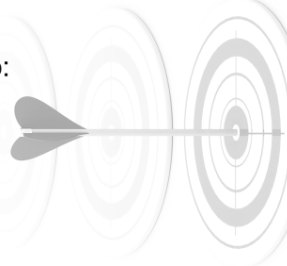
If you have any questions about the material in the session, please ask them using the chat feature at this time.

Notes: _____

SESSION SUMMARY

In this session, you learned how to:

- Describe the process for assessing effectiveness of items
- Describe the process for assessing user learning
- Run training evaluation reports



Slide 77: Session 3 Summary

Session 3 Summary

This concludes DMLM Session 3. You should now be able to:

- Describe the process for assessing effectiveness of items
- Describe the process for assessing user learning
- Run training evaluation reports

SESSION 4 PREVIEW

- Lesson 1: User Records
- Lesson 2: Event-Based Requirements
- Lesson 3: Assignment Profiles
- Lesson 4: Creating Cohorts



Slide 78: Session 4 Preview

Session 4 Preview

Here is a preview of the lessons for Session 4.

- Lesson 1: User Records
- Lesson 2: Event-Based Requirements
- Lesson 3: Assignment Profiles
- Lesson 4: Creating Cohorts

Thank you for taking the time to attend this course and for all your participation and contributions.

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 79: 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):
 - 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: _____

3.0 Appendix

3.1 Appendix A: VA TMS Key Terms

| Term | Definition |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Administrator | An administrator is a person that has been granted special privileges for and an account in the Admin URL of the VA TMS. While we use the same Admin ID for these administrative accounts as was used for the User ID on the User URL, the two accounts are not connected in any way. |
| Assessment | An Assessment is a portion of an online item that contains an examination or quiz. One or more assessments can be included in an online item, so that a single online item may be composed of several assessments. Assessments may be grouped, along with content objects, into one or more groups (called folders) within the same online item. Exams are a critical way to measure users' completion of learning content. |
| Content Object | Content objects are hyperlinks that point to online content that resides on a website outside of the TMS. They are the building blocks of online Items. Most of the material in the TMS is delivered to the user via a content object. |

| Term | Definition |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Curricula | <p>Curricula are building blocks for managing learning activities. Curricula allow groupings of all number of learning requirements together into one unit and track the completion of that required learning as a unit.</p> <p>Based on the learning history of the user, a curriculum shall have one of two statuses:</p> <ul style="list-style-type: none"> • Complete: indicating that all of the Items and sub-curricula of the Curriculum have been completed in the required by date has not been exceeded. • Incomplete: indicating that either one or more Items in this curriculum, or one of its sub-curricula, have not been completed and the required by date has been exceeded. <p>Each item within a curriculum shall have either no retraining interval associated with it (indicating that retraining on this item is not required) or shall have a number of days in the retraining interval, indicating a periodic retraining need for that particular Item. An Item can also be optional, which means that the completion status on an optional item may not affect the curriculum status of the User.</p> |
| Custom Reports | <p>Custom reports allow VA to create customized reports specific to VA. The reports the VA develops are then easily run in the TMS.</p> |
| Days Remaining | <p>Number of days remaining before the expiration of the required-by date for completing a specific item.</p> |
| Delivery Method | <p>The instructional method used to deliver learning. Examples might include instructor-led training, computer-based training, on-the-job training, and self-study. However, delivery methods are defined by the VA to suit our specific needs. The creation and assignment of delivery methods also helps to speed up searches and queries.</p> |

| Term | Definition |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Document | Any type of media (manual, regulation, etc.) for which a record has been created, enabling it to be tracked by the TMS Administration. Documents are associated to Items, to curricula, and/or to tasks. |

| Term | Definition |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Document Type | <p>Document types are categories the VA has set up for the printed materials used in training documents, based upon VA needs. The assignment of document types helps to speed up searches and queries. VA TMS provides the capability to associate documents such as regulations, policy/procedure documents, and reference materials with an Item. The Document Type field contains categories that allow all documents to be grouped into logical areas. VA will also use the Documents tab to attach hyperlinks to course detail information for some Items. The list of Document Types for the VA TMS is:</p> <ul style="list-style-type: none"> • Description: Specific VA Learning library document containing additional information • Link to Web: Hyperlink to supportive website • Link to Conference Site: Hyperlink to conference website • Link to Evaluation and Certificate: Hyperlink to website containing online evaluation and certificate • Link to Registration: Hyperlink registration website or form • Pocketcard: An electronic document of a pocketcard which typically contain reference information and are usually small. • Brochure: Document containing specific accreditation information and program information • Registration: Registration information and/or form • Announcement/Flyer: Promotional Material • Instructions for Travelers: Specific travel information for travelers • Instructions for Use: Implementation, information comma and suggestions for local use |

| Term | Definition |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <ul style="list-style-type: none"> • Handout: Handouts that support the educational opportunity • Policy/Regulation: VA policy or regulation • Scantron Instructions: Instructions for completing Scantron form • Ordering Instructions • Evaluation Guide: Detailed information on how to evaluate program and can also include evaluation questions for scantron form. |
| Effective Date | <p>The effective date is the date when a new or revised Item will be used for the calculation of item completion statuses and curriculum statuses. It is set as part of the Item record that will be included in a curriculum; the default date is the current date; but a future date may be set so that a User's curriculum status does not change to "incomplete" when the item is added. By making the effective date a future date, a "grace period" is allowed for users to complete the new Item in the time allotted, without affecting their "complete" curriculum status. During the grace period before the effective day, the Item appears on the learning plans of all users to whom the curriculum has been a sign.</p> |
| Facility | <p>A facility is a grouping of training locations. Facilities maybe buildings, plants, branch locations, or some other way that makes sense for the VA to group locations.</p> |
| Manager | <p>A manager is a user that has been designated to oversee another user's learning. A manager has the ability to log in to the TMS user access on behalf of their direct reports, and to view their direct reports' learning information and assign learning to them. They can also record learning events for their users.</p> |

| Term | Definition |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reserved Seat | A reserved seat is a reservation made by an organization for registrations in a class. Names of specific users may not be available when the organization acquires reserved seats, but at some point, names of users who belong to the organization that acquired the reserved seats can be supplied. Reserved seat requests are recorded using the Seat Reservations tab in the class record or by using the Registration Assistant tool in the user record. |
| Security Domain | The VA TMS is organized in accordance with the current VA organizational chart. For example, each VACO staff and program office, VHA VAMC, VHA VISN, VBA regional office, NCA MSN is a separate entity in the TMS called a "security domain." In VA TMS, security domains are used to manage users, administrators, courses (Items), libraries, facilities and locations. Currently, there are over 300 security domains in VA TMS, grouped in accordance with the VA organizational chart. Within VACO, there are several security domains, each of which is a training management unit in the VA TMS. |
| Sequence Number | A sequence number indicates the order in which the items in the curriculum will be scheduled by the system. It is the order the User is expected to take the assigned items in the curriculum. For online items the system will not prevent a User from taking the items out of the scheduled order (i.e. the user can take the items in any order). |
| Substitutes | A feature of the TMS that allows VA to indicate that the successful completion of a particular item also provides credit for another Item. The substitute is automatically entered by the TMS as a separate learning event for a given user when a learning event for the originating item is entered. |

| Term | Definition |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Task | <p>A task is a discrete unit of work with a definite beginning and end, which can be performed in a relatively short period of time, and which results in one of the following: a finished product- a completed service- a change in the work environment. VA can create records for tasks, which can then be related to items, competences, to job positions, to job locations, and to documents. This results in greater visibility of the relationship between items and particular aspects of actual job performance (e.g., VA can keep track of the tasks that are covered by an on-the-job training (OJT) guide and its associated job performance measure (JPM).</p> |
| Time Slots | <p>Unit of division of a course offering based on duration that facilitates variable resource scheduling. For example, a 40-hour course can be scheduled in any of the following ways:</p> <ul style="list-style-type: none"> • Divide it into five 8-hour time slots, scheduled one time slot per day for five days • Divided into ten 4-hour time slots, scheduled two time slots per day for five days, or into four 10-hour time slots, scheduled one per day for four days • Divided into any number of time slots of uniform or varying duration, scheduled over a period of days in order to fit the particular circumstances <p>Thus, the TMS gives VA flexibility, which allows a course that meets first for a two- hour time slot in an auditorium to be scheduled, then for three-hour time slot in a classroom, even though the time slots may have completely different instructor and resource requirements.</p> |
| User | <p>A User of the VA TMS includes all VA employees and staff (residents, volunteers, WOCs, students, contractors, and federal non-VA employees). Training will prepare all VA employees and staff to use the VA TMS to register for, access, and record training assignments. This training is intended to be delivered at the local level.</p> |

| Term | Definition |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Waitlist | A list of users for whom no space currently exists in a class. VA can set up the TMS administration such that users can be moved automatically from the waitlist to a request list using the Waitlist to Request tool in the Automatic Processes subsection of System Admin. |
| Web Based | A website, online training, CD-ROM or other computer-based training. If an online course, the link will be found in the library details, if a CD-ROM, the information for obtaining this will be found in the description document. |

3.2 Appendix B: VA TMS Records Naming Conventions

| Type of Record | How to Name Record |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Item | ALWAYS let the system assign the number. "Auto Generate" check box is already checked by VA business policy. |
| Class | ALWAYS let the system "auto generate" this number. |
| Document | Domain ID (Hyphen) Number of the document (3 digits) Example: DVA-001 |
| Content Object | Domain ID (Hyphen) Item Type Item ID (Hyphen) Sequential number of the content object (2 digits) Examples: DVA-VA54321-01 DVA-VA54321-02 301-VA3456-01 |
| Curriculum | Domain (Hyphen) Next available number (3 digits) Must perform a search to find next number. Example: NCA-020 |
| Requirement | Domain (Hyphen) Next available number (3 digits) Must perform a search to find next number. Examples: DVA-001 |
| Assignment Profile | Domain (Hyphen) CURR (4- letter abbreviation) (Hyphen) A short description of attributes being used to define the AP Example: IND-CURR-HazMat for Police |
| Cohort | Domain (Hyphen) Next available number (3 digits) Must perform a search to find next number. Example: EES-103 |

3.3 Appendix C: VA TMS Resources Naming Conventions

| Type of Resource | How to Name Resource |
|-------------------|-----------------------------------------------------------------------|
| Instructor | ALWAYS let the system "auto generate" this number. |
| Equipment | ALWAYS let the system "auto generate" this number. |
| Materials | Domain (Hyphen) Description Example: TUC-Books for CREW |
| Facilities | Domain (Hyphen) Description Example: STL-John Cochran |
| Locations | Domain (Hyphen) Description Example: STL-Auditorium |

3.4 Appendix D VA TMS Functions and Associated Roles

| VA TMS Admin Function | LM | DM | UM | IM | RM | SM | AM | APM | PRGM | CTLGM | HD | PR | QEM | CM | CIM | RPT | AHN | ACM | ACIM | MSE | MSEHD | LHM | ISO |
|--------------------------------------------------|----|----|----|----|----|----|----|-----|------|-------|----|------------------|-----|----|-----|-----|-------------|-----|------|-----|-------|-----|-----|
| Unlock User Accounts | X | | | | | | | | | | X | X | | | | | | | | | X | | |
| Reset User Passwords | X | | | | | | | | | | X | X | | | | | | | | | X | | |
| Change Managers for a group of Users | X | | | | | | | | | | | | | | | | | | | | | | |
| Proxy into Users accounts | X | | | | | | | | | | X | | | | | | | | | | | | |
| Add/Remove Items to/from Learning Plan | X | | | | | | X | | | | | | | | | | | | | | | | |
| Add/Remove Curricula Assignments | X | | | | | | X | | | | | | | | | | | | | | | | |
| Record Item/External Event/Classes | X | | | | X | | | | | | | | | | | | | | | | | | |
| Edit/Delete Recorded Learning Events | X | | | | X | | | | | | | | | | | | | | | | | | |
| Merge User Records | | | X | | | | | | | | | | | | | | | | | | | | |
| Add/Edit Items | X | | | X | | | | | | | | | | | | | | | | | | | |
| Add/Edit Curricula | X | | | X | | | | | | | | | | | | | | | | | | | |
| Add/Edit Programs | | | | | | | | | X | | | | | | | | | | | | | | |
| Add/Edit Class | X | | | | X | X | X | | | | | | | | | | | | | | | | |
| Send Email Notifications | X | | | | | | | | | | | | | | | | X | | | | | | |
| Add/Edit Classes | X | | | | | X | | | | | | | | | | | | | | | | | |
| Register/unregister Users into a Class | X | | | | X | X | | | | | | | | | | | | | | | | | |
| Assign/Remove Competency Profiles to/from Users | | | | | | | | | | | | | | X | | | | | | | | | |
| Assign/Remove Competencies to/from Users | | | | | | | | | | | | | | X | | | | | | | | | |
| Manage Administrator Accounts | | X | | | | | | | | | | | | | | | | | | | | | |
| Add/Edit/Copy/Delete Assignment Profiles | | | | | | | | X | | | | | | | | | | | | | | | |
| Edit User Preferred Accreditations | X | | | | | | | | | | X | | | | | | | X | | | | | |
| Edit User Occupational Categories | X | | | | | | | | | | X | | | | | | | X | | | | | |
| Add/Edit/Delete Libraries | | | X | | | | | | | | | | | | | | | | | | | | |
| Set Tier and Relance in Libraries | | | | | | | | | | X | | | | | | | | | | | | | |
| Edit User Approval Role | | | X | | | | | | | | | | | | | | | | | | | | |
| Add/Edit Instructor & Change Instructor Role | X | | | | | | | | | | | | | | | | | | | | | | |
| Add/Edit/Delete Competencies | | | | | | | | | | | | | | X | | | | | | | | | |
| Add/Remove Competencies from Items | | | | | | | | | | | | | | X | X | | | | | | | | |
| Add/Edit/Delete Competency Profiles | | | | | | | | | | | | | | X | | | | | | | | | |
| Add/Edit/Delete Questions | | | | | | | | | | | | | X | | | | | | | | | | |
| Add/Edit/Delete Assessments | | | | | | | | | | | | | X | | | | | | | | | | |
| Assign/Remove Questions to/from Assessments | | | | | | | | | | | | | X | | | | | | | | | | |
| Add/Edit/Delete Surveys | X | | | | | | | | | | | | X | | | | | | | | | | |
| Unassign a Survey from Users | X | | | | | | | | | | | | | | | | | | | | | | |
| Add/Edit Accreditations | | | | | | | | | | | | | | | | | | X | | | | | |
| Apply Accreditations to Items | | | | | | | | | | | | | | | | | | X | X | | | | |
| Create Deep Links | | | X | X | | X | | | | | | | | | | | | | | X | | | |
| Run various Standard and Custom Reports | X | | X | X | X | X | X | | | | | | X | X | X | X | | X | X | | X | | |
| Import Learning History | | | | | | | | | | | | | | | | | | | | | | X | |
| View User Learning History | X | | | | X | | X | | | | X | | | | | | | | | | X | | X |
| Add/Edit/Delete Resources (Equip., Locat., Fac.) | X | | | | | | | | | | | | | | | | | | | | | | |
| View Self Enrolled User | | | | | | | | | | | | | | | | | | | | X | X | | |
| Validate Self Enrolled User | | | | | | | | | | | | | | | | | | | | X | | | |
| Download Search Results | X | | | X | X | X | X | X | | | X | X | | X | X | | | X | X | | X | | X |
| Legend | | | | | | | | | | | X | Stand Alone Role | | | | X | Add-On Role | | | | | | |

NOTE: Green columns indicate add-on roles; white columns indicate stand-alone roles.

Figure 1: VA TMS Functions and Associated Roles