



Assignment Profiles (Advanced Topic)

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

May 2015

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1.0 About This Training

1.1 Training Purpose

The purpose of Assignment Profiles is to provide detailed information about setting up and propagating automated learning assignments to users in the VA TMS.

1.2 Target Audience

This session is an Advanced Topic training session for any VA TMS administrators with some experience in Assignment Profiles that are looking for more in-depth instruction.

1.3 Training Length

This training will run for approximately 3.5 hours. Brief breaks will be given.

1.4 Participant Guide

This Participant Guide contains all key content presented in this training, including PowerPoint slides with room for taking notes, activities, and demonstrations for each lesson.

The Participant Guide is divided into two sections:

- About This Training
- Training Content

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

1.4.1 Participant Guide Icons

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

1.5 Participant Preparation and Guidelines

1.5.1 Requirements

Participants must complete the following for this training:

- Register for training through the VA TMS.
- Print a hardcopy of this Participant Guide for use during the training. It will be difficult to access electronically during training.

1.5.2 Demonstrations and System Practice Activities in VA TMS

During this training, you will observe instructor demonstrations and complete system practice activities within the VA TMS. 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 system practice activity have been provided in this guide so you can follow-along. You may also want to reference these steps after the training.

1.5.3 Virtual Instructor-Led Training Guidelines

This training will be delivered as a Virtual Instructor-Led Training (VILT) using a Web conferencing software program. You will need a computer and phone with speakers or headset in order to participate in this training. Follow the guidelines below to ensure the best training experience:

- Print a hardcopy of the Participant Guide for use during training.
- Be sure to log in to the Web conferencing software and dial in to 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 question immediately. Otherwise, he or she will answer at the end of the training, or send an e-mail afterward.

1.6 VA TMS Administrators Role-Based Training Sessions and Target Audiences

The table below includes a list of all training sessions in this training series, along with the target audience.

Session	Required for	Recommended for
Introduction to VA TMS for All Administrators and Help Desk and Reports Managers	<ul style="list-style-type: none"> • Help Desk (as stand-alone training) • Reports Managers (as stand-alone training) • Assignment Managers • Scheduling Managers • Registration Managers • Domain Managers • Learning Managers • Item Managers • AP Managers 	n/a
VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers	<ul style="list-style-type: none"> • Assignment Managers • Scheduling Managers • Registration Managers 	<ul style="list-style-type: none"> • Domain Managers • Learning Managers • Item Managers • AP Managers

NOTE: There are also advanced topic sessions that are optional for managers who already have experience using the VA TMS.

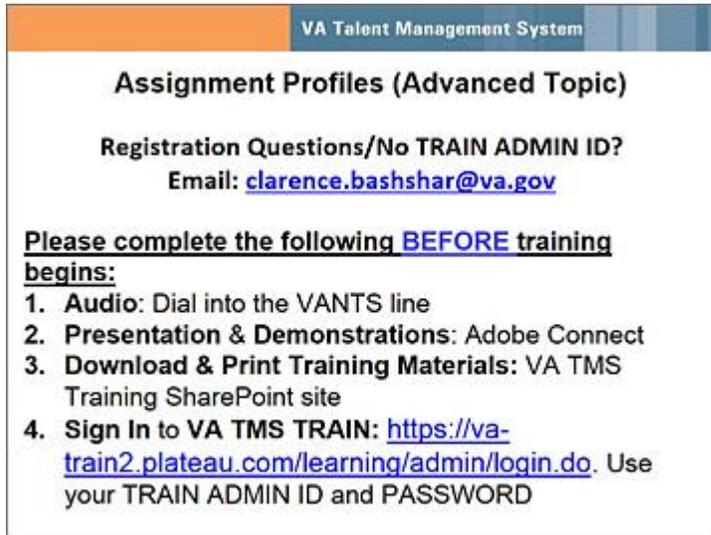
1.7 VA TMS Functions and Associated Roles

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

VA TMS Admin Function	LM	DM	IM	RM	SM	AM	APM	HD	PR	QEM	CM	CIM	HR	RPT	AHN	PM	COM	ACM	ACIM	MSE	MSEHD	
Unlock User Accounts	X							X	X													
Reset User Passwords	X							X	X													
Change Supervisors 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/Scheduled Offerings	X			X																		
Edit/Delete Recorded Learning Events	X			X																		
Merge User Records		X																				
Add/Edit Items	X		X																			
Add/Edit Curricula	X		X																			
Send Notifications	X														X							
Add/Edit Scheduled Offerings	X				X																	
Register Users into a Scheduled Offerings	X			X	X																	
Edit User's Registration in Scheduled Offering	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 Competencies											X											
Add/Remove Competencies from Items												X										
Add/Edit/Delete Competency Profiles											X											
Enter/Delete Competency Assessments for Users	X			X		X					X											
Add/Edit/Delete Questions										X												
Add/Edit/Delete Exam Objects										X												
Assign/Remove Questions to/from Exam Objects										X												
Add Questionnaire/Surveys										X												
Unassign a Survey from Users	X																					
Edit Organization Dashboard Ownership		X																				
Add/Edit Accreditations																		X				
Apply Accreditations to Items																		X	X			
View sensitive information on Users Records													X									
Create and Manage Communities																	X					
Run various Standard and Custom Reports	X		X	X	X	X							X	X								
View Self Enrolled User	X					X		X													X	X
Validate Self Enrolled User																					X	
Bookmark Available Entities	X		X	X	X	X		X														
Download Search Results	X		X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X	X

2.0 Training Content

2.1 Welcome



VA Talent Management System

Assignment Profiles (Advanced Topic)

Registration Questions/No TRAIN ADMIN ID?
Email: clarence.bashshar@va.gov

Please complete the following BEFORE training begins:

1. **Audio:** Dial into the VANTS line
2. **Presentation & Demonstrations:** Adobe Connect
3. **Download & Print Training Materials:** VA TMS Training SharePoint site
4. **Sign In to VA TMS TRAIN:** <https://va-train2.plateau.com/learning/admin/login.do>. Use your TRAIN ADMIN ID and PASSWORD

Notes:

Slide 1: Session Preparation



VA Talent Management System

**VA TMS Role-Based Training:
Assignment Profiles (Advanced Topic)**





Notes:

Slide 2: VA TMS Role-Based Training: Assignment Profiles (Advanced Topic)

Advanced Topics VA Talent Management System

Session Agenda

- Welcome and Introduction
- Lesson 1: Assigning Curricula to Job Codes
- Lesson 2: Assignment Profiles
- Lesson 3: Automatic Process Manager (APM) and Manual Synchronization
- Questions and Answers

3

Notes:

Slide 3: Session Agenda

Advanced Topics VA Talent Management System

Session Agenda

- Welcome and Introduction
- Lesson 1: Assigning Curricula to Job Codes
- Lesson 2: Assignment Profiles
- Lesson 3: Automatic Process Manager (APM) and Manual Synchronization
- Questions and Answers

3

Notes:

Slide 4: Session Agenda

Advanced Topics VA Talent Management System

Introductions

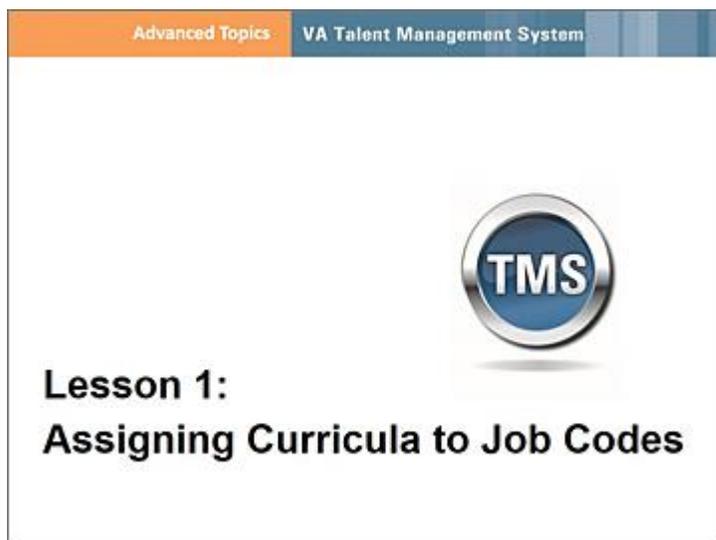
- Name
- Division of VA
- Experience with VA TMS
- Personal training goal

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Notes:

Session 5: Introductions

2.2 Lesson 1: Assigning Curricula to Job Codes



Notes:

Slide 6: Lesson 1: Assigning Curricula to Job Codes

	Free-Floating Items	Curricula	Batch Assign?	Automatic Assignment?
User Record	Yes (To-Do List; no retraining)	Yes (Curricula tab or To-Do List)	No	No
User Needs Management	Yes	Yes	Yes (1 time)	No
Job Codes	No	Yes	Yes	Yes
Assignment Profiles	Yes	Yes	Yes	Yes

Notes:

Slide 7: Methods of Assigned Learning

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Curricula and Job Codes

- Curricula can be associated with job codes
- When a user is assigned a job code, curricula can be automatically assigned to the user and the items contained within the curricula added to his/her To-Do List
- The relationship between a curriculum and a job code is created in the job code record

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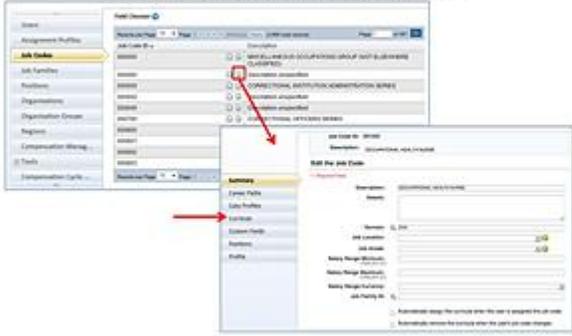
Notes:

Slide 8: Curricula and Job Codes

Advanced Topics VA Talent Management System

Curricula and Job Codes

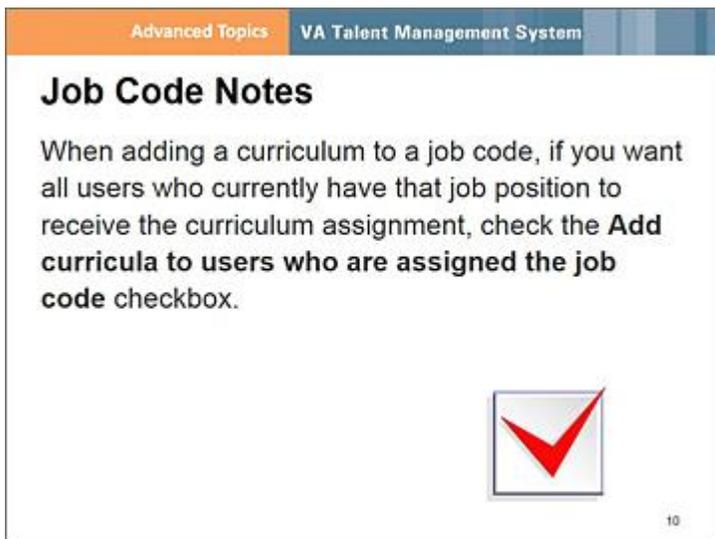
Users > Job Codes > Search > Edit



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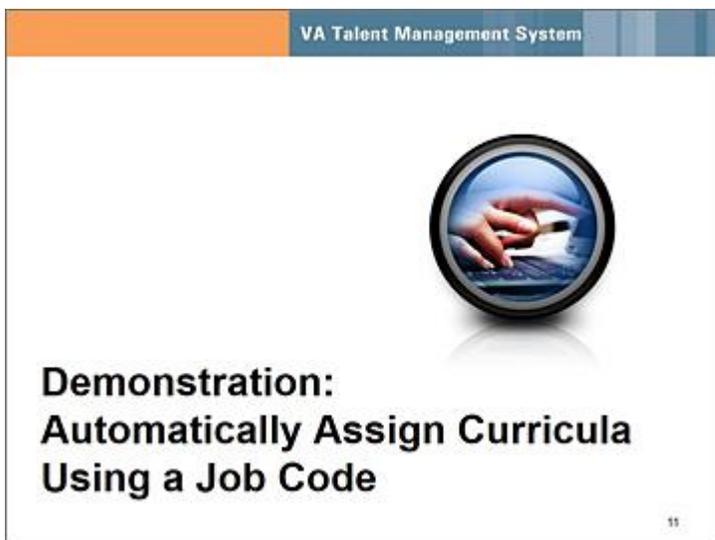
Notes:

Slide 9: Curricula and Job Codes



Notes:

Slide 10: Job Code Notes



Notes:

Slide 11: Demonstration: Automatically Assign Curricula
Using a Job Code



Demonstration: Automatically Assign Curricula Using a Job Code

To associate a curriculum to a job code:

1. Navigate to **Users> Job Codes**.
2. Enter criteria to search for the desired job code and select **Search**.
3. Select the **Edit** icon to access the job position record in edit mode.
4. Scroll to the bottom of the Summary tab page.
5. Select the **Automatically assign the curricula when the user is assigned this job code** and **Automatically remove the curricula when the user's job code changes** checkboxes.
6. Select **Apply Changes**.
7. Select the **Curricula** tab.
8. Select the **add one or more from list** link.
9. Enter criteria to search for the curriculum to add.
10. Select **Search**.
11. Select the **Add** checkbox next to the curriculum to add.
12. Scroll to the bottom of the Search Results page.
13. Check the **Add curricula to users who are assigned this job code** checkbox.
14. Select **Add**. **NOTE:** If this action impacts too many records, the system may require you to schedule the job to run during established off-peak hours.



The Job Aid Manage Curriculum is available in the VA TMS.

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System Login

- Go to <https://va-train2.plateau.com/learning/admin/login.do>
- Enter your TRAIN Admin Username
- Enter your TRAIN Admin Password



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Notes:

Slide 12: System Login

Advanced Topics VA Talent Management System

Activity #1: Associate Curriculum to a Job Code

System Practice



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Notes:

Slide 13: Activity #1: Associate Curriculum to a Job Code



Activity #1: Associate Curriculum to a Job Code

1. Navigate to **Users> Job Codes**.
2. Enter criteria to search for the desired job code and select **Search**.
3. Select the **Edit** icon to access the job code record in edit mode.
4. Scroll to the bottom of the Summary tab page.
5. Select the **Automatically assign the curricula when the user is assigned this job code** and **Automatically remove the curricula when the user's job code changes** checkboxes.
6. Select **Apply Changes**.
7. Select the **Curricula** tab.
8. Select the **add one or more from list** link.
9. Enter criteria to search for the curriculum to add.
10. Select **Search**.
11. Select the **Add** checkbox next to the curriculum to add.
12. Scroll to the bottom of the Search Results page.
13. Check the **Add curricula to users who are assigned this job code** checkbox.
14. Select **Add**.



The Job Aid Manage Curriculum is available in the VA TMS.

2.3 Lesson 2: Assignment Profiles



Notes:

Slide 14: Lesson 2: Assignment Profiles



Assignment Profile

The assignment profile uses the common attributes of a group of users to assign curricula and items.

Key Terms for Assignment Profiles:

- Groups
- Attributes
- Operator
- Value

Notes:

Slide 15: Assignment Profile

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Groups, Rules, and Attributes

- For each assignment profile, one or more groups of attributes may be created
- A user's attributes must match one value from each of the attributes in any one group in order for the user to be assigned the curricula in the assignment profile

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Notes:

Slide 16: Groups, Rules and Attributes

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Creating a Rule

Operators + Attributes + Values = Rule

Rule + Rule = Group

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Notes:

Slide 17: Creating a Rule

Advanced Topics VA Talent Management System

Profile Attributes

Example of assigning users to an assignment profile with the following attributes:

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

Results:

AND

1 group of employees that are in sales and were hired on or before 1/1/12

OR

Group 1: employees that are in sales

Group 2: employees hired on or before 1/1/12

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Notes:

Slide 18: Profile Attributes

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Knowledge Check

Which user matches the following profile?

Domain: HR, IT

Group	Attribute	Operator	Value
1	Job location	Matches	DC, MD, CA
1	Hire Date	Between	01/01/2000-12/31/2010

a) Tom Smith, Domain = IT, Job Location= DC, Hire date=06/15/2008
 b) Jane Doe, Domain = HR, Job Location= MD, Hire date= 04/05/2007
 c) Bob Thomas, Domain= EHS, Job Location= DC, Hire date= 07/08/2007
 d) Jan Jones, Domain= IT, Job Location= VA, Hire date= 10/30/2006

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Notes:

Slide 19: Knowledge Check

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Adding Rules to the AP

1. Use Advanced Search first to determine the correct number of users for the profile.
2. Create rules by adding attributes and values from the bottom of the screen up.
 - Rules in the same group create an AND relationship.
 - Adding a new group creates an OR relationship.
3. Add domains last.
4. Use Preview Users in Assignment Profile to check that number of users matches first search.

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Notes:

Slide 20: Adding Rules to the AP

Advanced Topics VA Talent Management System

Associating Learning

- Curricula and Items are added to the assignment profile from the Curricula tab or Items tab in the Related area
- To “push” the curricula or items out to users who currently match the assignment profile criteria, select Propagate in the Actions area. Manual propagation only needs to be done when the assignment profile is initially created or if the domains or attributes change

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Notes:

Slide 21: Associating Learning



Notes:

Slide 22: Demonstration: Assignment Profile



Demonstration: Assignment Profile

To add a new assignment profile:

1. Navigate to **Users > Assignment Profiles**.
2. Select **Add New**. **NOTE:** You can also enter **Add Assignment Profile** into the Search field below the button bar and select **Go**.
3. Enter an assignment profile ID.
4. Enter a description.
5. Select a domain.
6. Enter an email address for the person responsible for the assignment profile.
7. Enter the **Created For information**. This identifies the person who requested the assignment profile to be created.
8. Enter any applicable notes.
9. Select **Add**.
10. In the Recommended Next box, select **Define User Pool**.
11. Select **OK** on the Create Assignment Rules pop-up message.
12. In the Set up Rules section, select **Job Location ID** from the Select Attribute drop-down menu.
13. Select **Matches** from the Select Operator drop-down menu.
14. In the values box (currently blank), enter **DC, MD**. You can also use the magnifying glass icon to search for the desired values.
15. Select **Save**.
- 16.** In the Set up Domain section, select **Add Domain(s)**.
17. Enter criteria to search for the desired domains.
18. Select **Search**.
19. Check the **Top Level Only** checkbox.
20. Select **Add**.
21. Select in the rule title textbox and enter a rule description.
22. Select **Save**. **NOTE:** You must enter the rule name, attribute, operator, and value.
23. Select **Preview Users in Assignment Profile** to see which users currently match the criteria.
24. Close the preview window.
25. Select **"X"**.
26. Select **Cancel** to return to the main assignment profile screen.

27. In the Recommended Next box, select **Add Curricula**.
28. Select **Add Curricula**.
29. Enter criteria to search for curricula.
30. Select **Search**.
31. Check the **Add** checkbox for the curricula to associate with the assignment profile.
32. Select **Add**.
33. Repeat **steps 28–32** for each curriculum to add to the profile.
34. In the Actions area, select **Propagate**. The system may require you to schedule this as a background job. Once this job runs, all users with the attributes you specified will be assigned the selected curricula.
35. Once the assignment profile has been successfully propagated, the **Existing Users in Assignment Profile** link in the Actions areas can be used to display the users that are currently being impacted by the assignment profile.



The Job Aid: Assign Learning via Assignment Profile is available in the VA TMS.



Notes:

Slide 23: Activity #2: Assignment Profile



Activity #2: Assignment Profile

To add a new assignment profile:

1. Navigate to **Users > Assignment Profiles**.
2. Select **Add New**. **NOTE:** You can also enter **Add Assignment Profile** into the Search field below the button bar and select **Go**.
3. Enter an assignment profile ID.
4. Enter a description.
5. Select a domain.
6. Enter an email address for the person responsible for the assignment profile.
7. Enter the **Created For information**. This identifies the person who requested the assignment profile to be created.
8. Enter any applicable notes.
9. Select **Add**.
10. In the Recommended Next: box, select **Define User Pool**.
11. Select **OK** on the Create Assignment Rules pop-up message.
12. In the Set up Rules section, select **Job Location ID** from the Select Attribute drop-down menu.
13. Select **Matches** from the Select Operator drop-down menu.
14. In the values box (currently blank), enter **DC, MD**. You can also use the magnifying glass icon to search for the desired values.
15. Select **Save**.
16. In the Set up Domain section, select **Add Domain(s)**.
17. Enter criteria to search for the desired domains. For this activity, search in the TRAIN domain.
18. Select **Search**.
19. Check the **Top Level Only** checkbox.
20. Select **Add**.
21. Select in the rule title textbox and enter a rule description.
22. Select **Save**. **NOTE:** You must enter the rule name, attribute, operator, and value.
23. Select **Preview Users in Assignment Profile** to see which users currently match the criteria.
24. Close the preview window.
25. Select **"X"**.
26. Select **Cancel** to return to the main assignment profile screen.

27. In the Recommended Next box, select **Add Curricula**.
28. Select **Add Curricula**.
29. Enter criteria to search for curricula.
30. Select **Search**.
31. Check the **Add** checkbox for the curricula to associate with the assignment profile.
32. Select **Add**.
33. Repeat steps 28–32 for each curriculum to add to the profile.
34. In the Actions area, select **Propagate**. The system may require you to schedule this as a background job. Once this job runs, all users with the attributes you specified will be assigned the selected curricula.
35. Once the assignment profile has been successfully propagated, the **Existing Users in Assignment Profile** link in the Actions areas can be used to display the users that are currently being impacted by the assignment profile.



The Job Aid: Assign Learning via Assignment Profile is available in the VA TMS.

Advanced Topics VA Talent Management System

Use Assignment Profiles for Free Standing Items

- Previously, free-standing items did not exist.
- Any items that were used in the VA TMS had to be attached to a curriculum, and it was that curriculum that was used in reports, profiles, assignments, and so on.
- With the recent VA TMS upgrade, there are now free-standing items and they can be linked to assignment profiles.

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Notes:

Slide 24: Use Assignment Profiles for Free Standing Items

Advanced Topics VA Talent Management System

New Feature

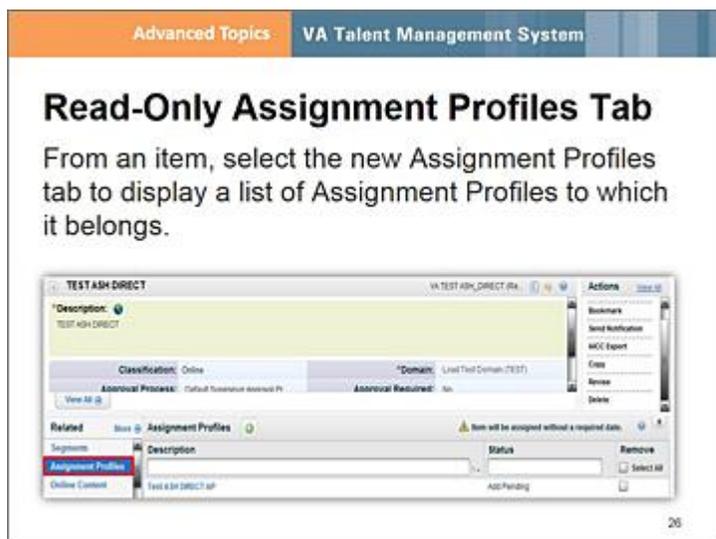
The VA TMS now supports free-standing items. As a result, there are two new tabs to help manage functionality:

- A read-only Assignment Profiles tab on the item record
- An editable Items tab on the assignment profile record

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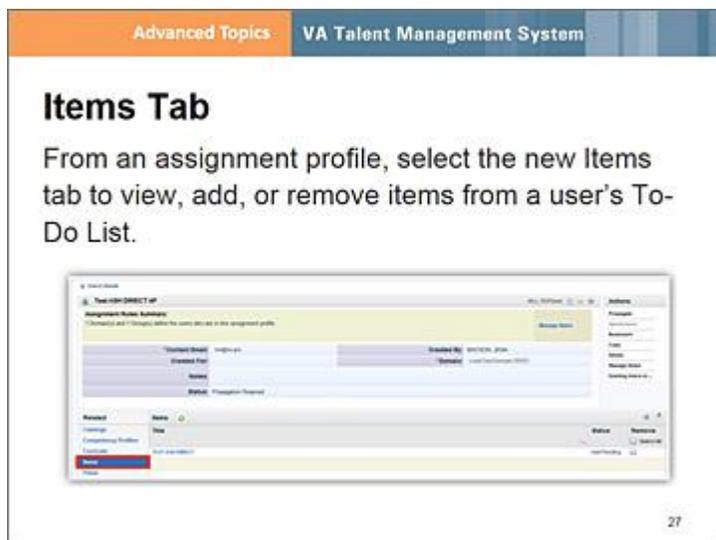
Notes:

Slide 25: New Feature



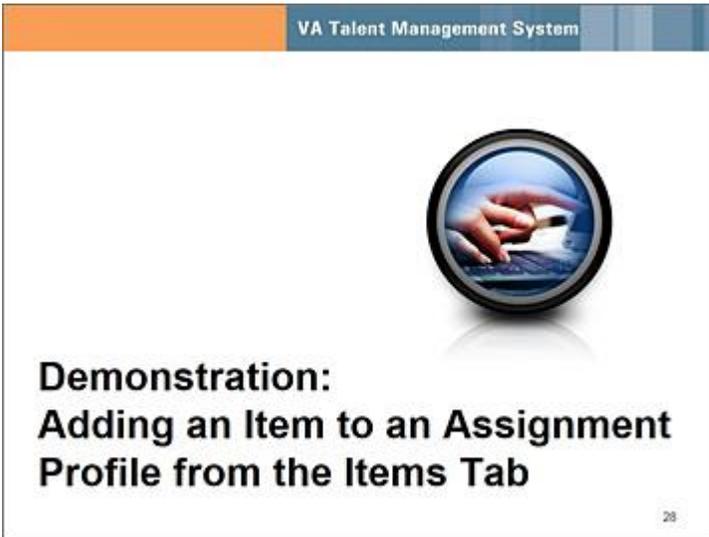
Notes:

Slide 26: Read-Only Assignment Profiles Tab



Notes:

Slide 27: Items Tab



Notes:

Slide 28: Demonstration: Adding an Item to an
Assignment Profile from the Items Tab



Demonstration: Adding an Item to an Assignment Profile from the Items Tab

From the VA TMS homepage:

1. To add an item to an assignment profile, you will first need to open an assignment profile.
2. Navigate to **Users** and select **Assignment Profile**.
3. Search for a current assignment profile. First, click in the **Assignment Profile ID** field.
4. For this example, enter “**KN-Test**”.
5. Select **Search**.
6. A list of results is displayed. Select the first option, **KN-Test**.
7. The assignment profile is now displayed. Select the **Items** tab.
8. Select the green **Add Item** icon.
9. The **Add Item** pop-up window is displayed. You will now search for an item to add to the assignment profile. Click in the **Description** field.
10. Enter “**Learning Web Design**”.
11. Select **Search**.
12. An item is displayed. Select the **check box** to the right of the Learning Web Design title.
Note: If you need to, you can add multiple items at this point.
13. Select **Add**.
14. The Assignment Profile record is now displayed with the free-standing item attached.

Advanced Topics VA Talent Management System

Other Items to Associate

- Catalogs—Users must have access to a catalog to see the items in it
- Roles—Mass assigns a new role to many users
- Recommended Items—Recommends items to certain users to appear on their home pages
- Competency Profiles—Assigns profiles to many users at once

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Notes:

Slide 29: Other Items to Associate

Advanced Topics VA Talent Management System

Recommending Items

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

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Notes:

Slide 30: Recommending Items

VA Talent Management System

Recommended Item Statuses

Once an item has been recommended, it can have one of three statuses:

- Valid Status (the assignment profile has been propagated)
- Add Pending (the assignment profile has not been propagated)
- Delete Pending (the assignment profile has not been propagated)

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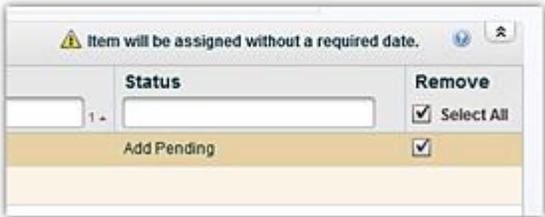
Notes:

Slide 31: Recommended Item Statuses

VA Talent Management System

Removing an Item

If you remove an item that has the status Add Pending, you can cancel the action without propagating it.



The screenshot shows a warning message: "Item will be assigned without a required date." Below the message is a table with a 'Status' column and a 'Remove' column. The 'Status' column contains the text "Add Pending". The 'Remove' column contains a checked checkbox and the text "Select All".

Status	Remove
Add Pending	<input checked="" type="checkbox"/> Select All

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Notes:

Slide 32: Removing an Item

VA Talent Management System

Required Date Assignment

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

- Calendar
- Event, with a blank Initial Number

To be assigned, it must have neither option selected, or a number entered for the event.

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Notes:

Slide 33: Required Date Assignment

VA Talent Management System

Changing an Initial Assignment

- Assignment Profile Synchronization (APM) automatic process begins
- Modified Item IS NOT reassigned to users who have already been assigned the item
- Modified Item IS reassigned with updated attributes if user attributes have changed since the APM

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Notes:

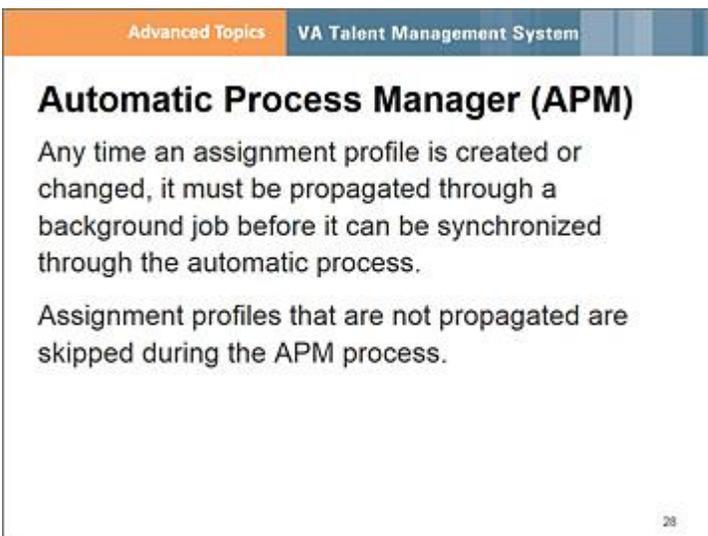
Slide 34: Changing an Initial Assignment

2.4 Lesson 3: Automatic Process Manager (APM) and Synchronization



Notes:

Slide 35: Lesson 3: Automatic Process Manager (APM) and Synchronization



Notes:

Slide 36: Automatic Process Manager (APM)

Advanced Topics VA Talent Management System

Manual Synchronization

- When you have new users who meet the attributes of an Assignment Profile and need to access the content right away
- The system allows you to synchronize an assignment profile only after you have propagated it
- When you select Synchronize, you can schedule the job to run immediately or in the background

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Notes:

Slide 37: Manual Synchronization

Advanced Topics VA Talent Management System

Related Reports

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

- Learning Needs
- To-Do List
- Curriculum Status
- Curriculum Item Status



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Notes:

Slide 38: Related Reports

Advanced Topics VA Talent Management System

Knowledge Check

New users can be added to an Assignment Profile before the APM process runs by using synchronization.

a) True
b) False



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Notes:

Slide 39: Knowledge Check

Advanced Topics VA Talent Management System

Evaluation & Self-Certification Reminder

- You will be prompted to complete the Evaluation and then you can complete your Self-Certification for this session.
- Evaluations can be found on your To-Do List.



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Notes:

Slide 40: Evaluation & Self-Certification Reminder



Notes:

Slide 41: Questions