



# **VA TMS Domain Manager and Learning Manager Administrator Course**

## **Session 3 of 3**

Virtual Instructor-Led Training  
Participant Guide

May 2015

## Table of Contents

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1.0 Session 3 of 3 .....	3
1.1 Welcome and Introduction.....	3
1.2 Lesson 1: The Evaluation Process .....	9
1.3 Lesson 2: Item Evaluation .....	13
1.4 Lesson 3: Learning Evaluation .....	33
1.5 Lesson 4: Follow-Up Evaluation .....	38
1.6 Lesson 5: User Survey Completion .....	46
1.7 Lesson 6: Evaluation Reports .....	49
1.8 Lesson 7: Running Reports.....	56



## 1.0 Session 3 of 3

### 1.1 Welcome and Introduction



Notes:

Slide 1: VA TMS Domain Manager and Learning Manager Administrator Course: Welcome and Introduction



Notes:

Slide 2: Participant Introductions

Session 3 VA Talent Management System

## Logistics

-  Scheduled breaks
-  Mute phone lines/don't put call on hold
-  Feel free to ask questions

3

Notes:

Slide 3: Logistics

Session 3 VA Talent Management System

## Course Goal

Provide instruction and interactive practice on the core concepts and administrative functions of the VA TMS specific to DM and LM job functions.



4

Notes:

Slide 4: Course Goal

Session 3 VA Talent Management System

## Course Objectives

After completing this course, you will be able to:

- Navigate and utilize Veterans Administration (VA) Talent Management System (TMS) functionality
- Create and configure items and curricula
- Create and configure online learning
- Create and configure scheduled offerings
- Create learning evaluations
- Assign learning, register participants, and record learning events
- Run, schedule, and save reports

5

Notes:

Slide 5: Course Objectives

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## Course Structure

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

6

Notes:

Slide 6: Course Structure

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## Training Methods

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

7

Notes:

Slide 7: Training Methods

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## Participant Guide

This guide contains:

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



8

Notes:

Slide 8: Participant Guide

Session 3 VA Talent Management System

### Session 3 Overview

- Lesson 1: The Evaluation Process
- Lesson 2: Item Evaluation
- Lesson 3: Learning Evaluation
- Lesson 4: Follow-Up Evaluation
- Lesson 5: User Survey Completion
- Lesson 6: Evaluation Reports
- Lesson 7: Running VA TMS Reports

9

Notes:

Slide 9: Session 3 Overview

Session 3 VA Talent Management System

### Session 3 Objectives

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

10

Notes:

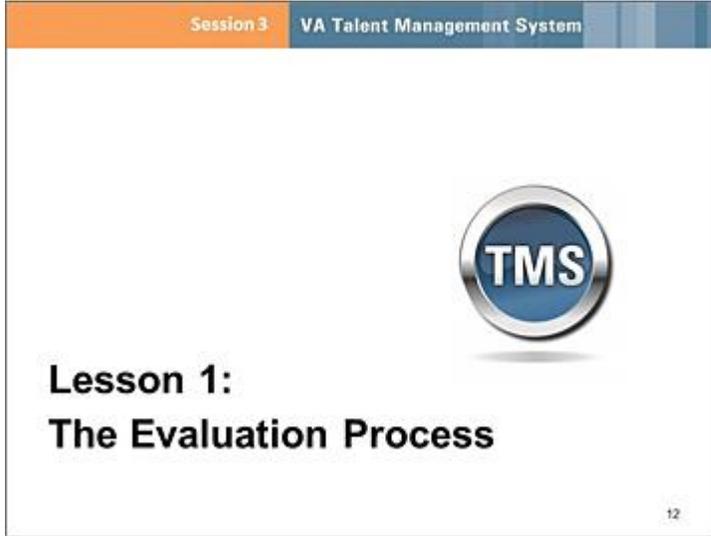
Slide 10: Session 3 Objectives



Notes:

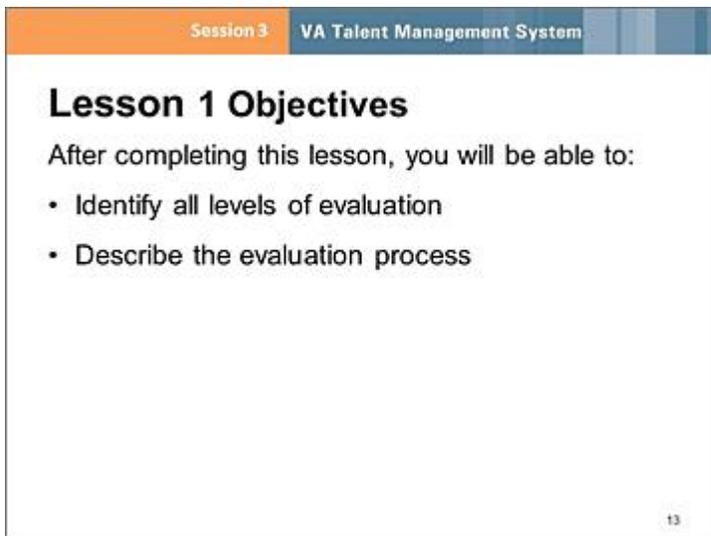
Slide 11: Questions?

## 1.2 Lesson 1: The Evaluation Process



Notes:

Slide 12: Lesson 1: The Evaluation Process



Notes:

Slide 13: Lesson 1 Objectives

Session 3 VA Talent Management System

## Kirkpatrick's Evaluation Model

The four levels of Kirkpatrick's Evaluation Model measure:

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

14

Notes:

Slide 14: Kirkpatrick's Evaluation Model

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## Steps to Implement the Model

1. Identify training program(s) (item) to be evaluated – *Online communication course*.
2. Create survey to capture users' reactions to the training.
3. Create pre- and post-exams (using Question Editor (QE)).
4. Create survey to follow-up on behavioral change or application of learning after the training.
5. Configure item(s) survey tab.
6. Assign learning needs to users.
7. User completes survey(s) upon completion of item.
8. Run report(s) to analyze results.

15

Notes:

Slide 15: Steps to Implement the Model

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## Preconfigured Requirements

**Exams:**

- Created using Question Editor
- Pre- and post-exams created ahead of time

**Item Record:**

- Must exist before survey can be associated

**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

16

Notes:

Slide 16: Preconfigured Requirements

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## Sample Rating Scales

Commonly used five-point rating scale (evaluation):

Unsatisfactory	Needs Work	Satisfactory	Exceeds Expectations	Excellent
1	2	3	4	5

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

Never	Seldom	Mostly	Frequently	Always
1	2	3	4	5

17

Notes:

Slide 17: Sample Rating Scales

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## Knowledge Check

What is the final step in any training program?

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



18

Notes:

Slide 18: Knowledge Check

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## Questions?

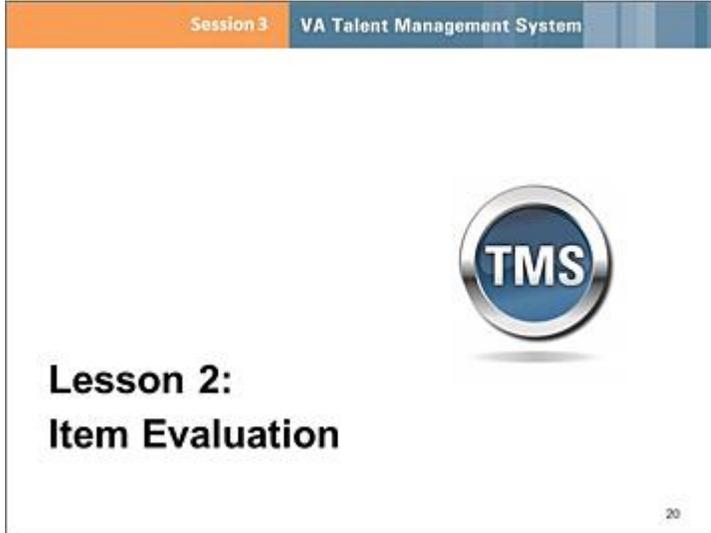


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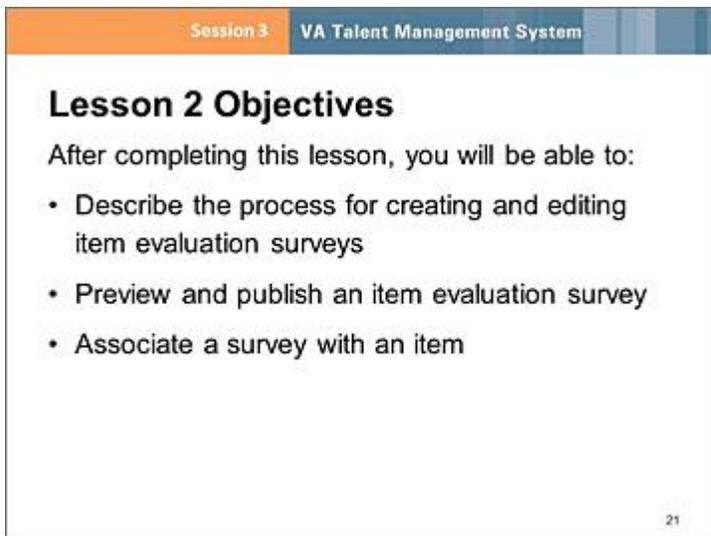
Slide 19: Questions?

### 1.3 Lesson 2: Item Evaluation



Notes:

Slide 20: Lesson 2: Item Evaluation



Notes:

Slide 21: Lesson 2 Objectives

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## Item Evaluation

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



22

Notes:

Slide 22: Item Evaluation

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## Sample Focus Areas

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

23

Notes:

Slide 23: Sample Focus Areas

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## 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

24

Notes:

Slide 24: Types of Questions

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## 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

25

Notes:

Slide 25: Four Question Types



Notes:

Slide 26: Demonstration: Item Evaluation Steps



## Demonstration: Item Evaluation Steps

### To complete an item evaluation:

1. Navigate to **Learning > Questionnaire Surveys**.
2. Select **Add New**.
3. Enter a survey ID.
4. Enter a survey name.
5. Select an evaluation level (for this example, select **Item Evaluation: User Satisfaction**).
6. Enter survey description.
7. Enter comments.
8. Select a domain.
9. Check **Active** checkbox.
10. Select **Add**.
11. Select the **Questions** tab.
12. Enter survey instructions.
13. Enter first page title.
14. Enter first page instructions.
15. Select **Add Question** icon.
16. Enter question stem.
17. Select question type (rating scale).
18. Select a rating scale.
19. Repeat steps 15–18 to add additional questions.
20. Select **Add Page** icon.
21. Enter second page title.
22. Enter second page instructions.
23. Select **Add Question** icon.
24. Enter question stem.

25. Select question type (rating scale).
26. Select a rating scale.
27. Repeat steps 23–26 to add additional questions.
28. Select **Save Draft**.



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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



27

Notes:

Slide 27: System Login

Session 3 VA Talent Management System

## Activity #1: Create a Survey

System Practice



28

Notes:

Slide 28: Activity #1: Create a Survey



### Activity #1: Create a Survey

1. Navigate to **Learning > Questionnaire Surveys**.
2. Select **Add New**.
3. Enter a survey ID.
4. Enter a survey name.
5. Select an evaluation level (for this example, select **Item Evaluation: User Satisfaction**).
6. Enter survey description.
7. Enter comments.
8. Select a domain.
9. Check **Active** checkbox.
10. Select **Add**.
11. Select the **Questions** tab.
12. Enter survey instructions.
13. Enter first page title.
14. Enter first page instructions.
15. Select **Add Question** icon.
16. Enter question stem.
17. Select question type (rating scale).
18. Select a rating scale.
19. Repeat steps 15–18 to add additional questions.
20. Select **Add Page** icon.
21. Enter second page title.
22. Enter second page instructions.
23. Select **Add Question** icon.
24. Enter question stem.
25. Select question type (rating scale).

26. Select a rating scale.
27. Repeat steps 23–26 to add additional questions.
28. Select **Save Draft**.

**Scenario:**

An online course on how to deal with customers, conflict, and confrontation has been created. You are responsible for creating the item evaluation 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.

**Task:**

Write down additional questions for each page of this survey. Each question will be a rating scale type using the five-point scale (created previously). 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.

**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.

1. 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.

1. The visual aids were accurate and of good 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.

1. 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.

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

Session 3 VA Talent Management System

## Configuration Options

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



29

Notes:

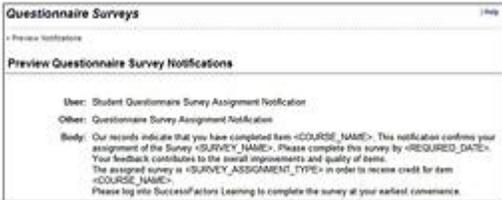
Slide 29: Configuration Options

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## Notifications

There are two notification templates associated with the questionnaire survey functionality:

- Email Template
- Roll-Up Email Template



30

Notes:

Slide 30: Notifications

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## Preview and Publish

- Once created, preview the draft survey before publishing it



31

Notes:

Slide 31: Preview and Publish

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## Demonstration: Configuring, Previewing, and Publishing Surveys

32

Notes:

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



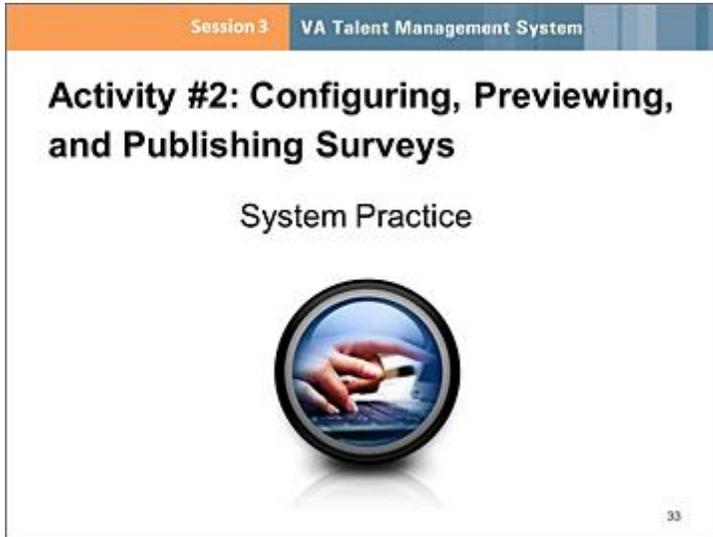
## Demonstration: Configuring, Previewing, and Publishing Surveys

### Configuring Surveys:

1. Access the survey records you created in the previous activity.
2. Select the **Options** tab.
3. Select **Yes** for anonymous surveys.
4. Check the **Required for Item Completion** checkbox.
5. Enter number of days to complete survey from assignment.
6. Select option to include comments field for each question.
7. Select **Apply Changes**.
8. Select the **Notifications** tab.
9. If necessary, edit body of notification message.
10. Select **Apply Changes**.
11. If necessary, select **Browse** to add an attachment to notification.
12. Select **Apply Changes**.

### Previewing and Publishing Surveys:

1. Select the **Questions** tab.
2. Select **Preview**.
3. Select **Draft** from drop-down menu.
4. Review preview of survey.
5. Select **Close** to close preview of 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

### Configuring Surveys:

1. Access the survey record you created in the previous activity.
2. Select the **Options** tab.
3. Select **Yes** for anonymous surveys.
4. Check the **Required for Item Completion** checkbox.
5. Enter number of days to complete survey from assignment.
6. Select option to include comments field for each question.
7. Select **Apply Changes**.
8. Select the **Notifications** tab.
9. If necessary, edit body of notification message.
10. Select **Apply Changes**.
11. If necessary, select **Browse** to add an attachment to notification.
12. Select **Apply Changes**.

### Previewing and Publishing Surveys:

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



The Job Aid: Item Evaluation Survey (Task C) is available in the VA TMS.

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## Associate the Survey

Associate a survey with an item:

- Within an item record from the Evaluations tab



34

Notes:

Slide 34: Associate the Survey

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## Only One Survey per Item

If a survey is already associated with an item, you will receive a warning message if you attempt to associate another survey.



Item	Survey ID (Survey Name)	Survey Assignment Type
COURSE 981 (Item 1 - W04291 1725 AmericaServer)	USER_BKT (Online Communication Course Feedback)	Required for Completion

35

Notes:

Slide 35: Only One Survey per Item



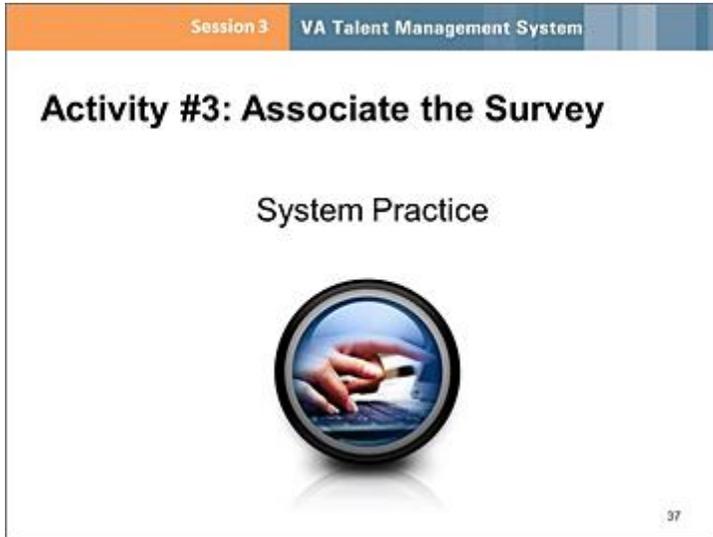
Notes:

Slide 36: Demonstration: Associate the Survey



### **Demonstration: Associate the Survey**

1. Navigate to **Learning**<**Items**.
2. Enter search criteria for the item to which you want to associate a survey.
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 **Evaluations** tab.
7. Select the **Survey** magnifying glass.
8. Enter search criteria for the survey you want to locate.
9. Select **Search**.
10. Select the 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, change these fields. If desired, enter or change the Days to Complete number and check/uncheck the **Required for Item Completion** checkbox.
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

1. Navigate to **Learning<Items**.
2. Enter search criteria for the item to which you want to associate a survey.
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 **Evaluations** tab.
7. Select the **Survey** magnifying glass.
8. Enter search criteria for the survey you want to locate.
9. Select **Search**.
10. Select the 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, change these fields. If desired, enter or change the Days to Complete number and check/uncheck the **Required for Item Completion** checkbox.
13. If any changes are made, select **Apply Changes** to save your modifications



The Job Aid: Item Evaluation Survey is available in the VA TMS.

Session 3 VA Talent Management System

## Knowledge Check

To create a survey, navigate to \_\_\_\_ and select the Questionnaire Surveys tab.

- a) Commerce
- b) Content
- c) Learning
- d) Performance



38

Notes:

Slide 38: Knowledge Check

Session 3 VA Talent Management System

## Questions?

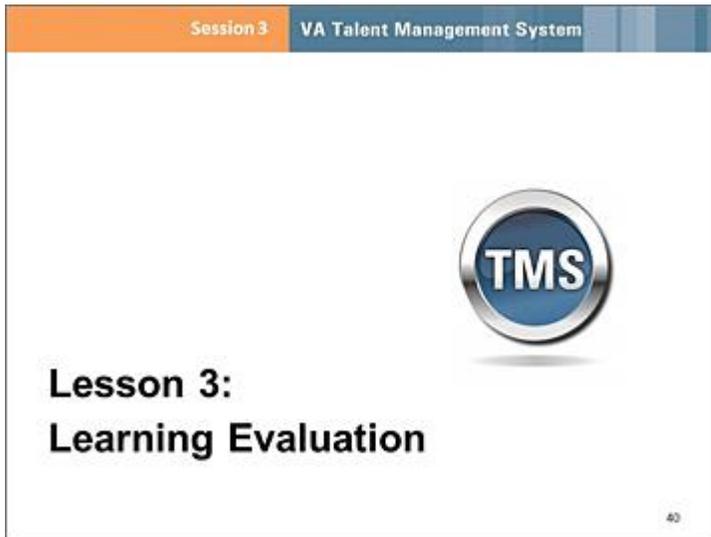


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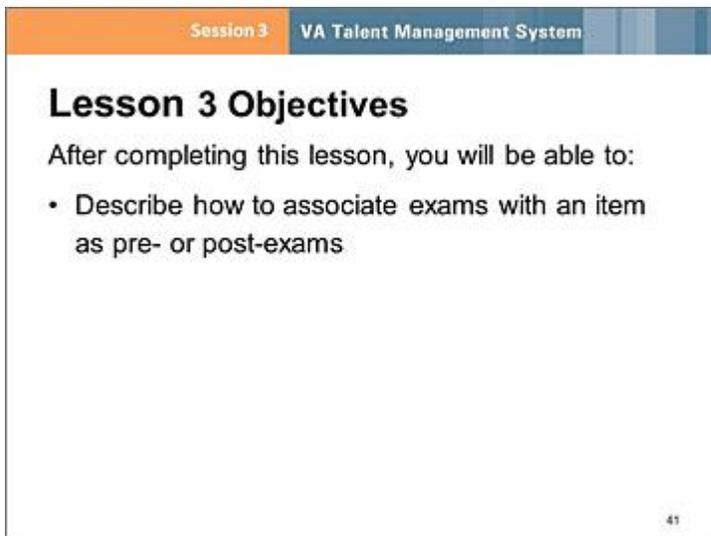
Slide 39: Questions?

## 1.4 Lesson 3: Learning Evaluation



Notes:

Slide 40: Lesson 3: Learning Evaluation



Notes:

Slide 41: Lesson 3 Objectives

Session 3 VA Talent Management System

## Learning Evaluation

- The purpose of the 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 in Question Editor.
- Best practice is to associate questions with objectives.



42

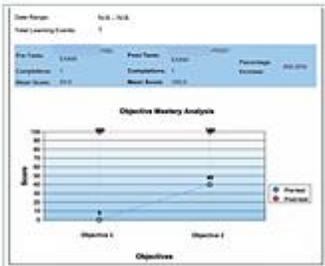
Notes:

Slide 42: Learning Evaluation

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## Sample Learning Evaluation Report

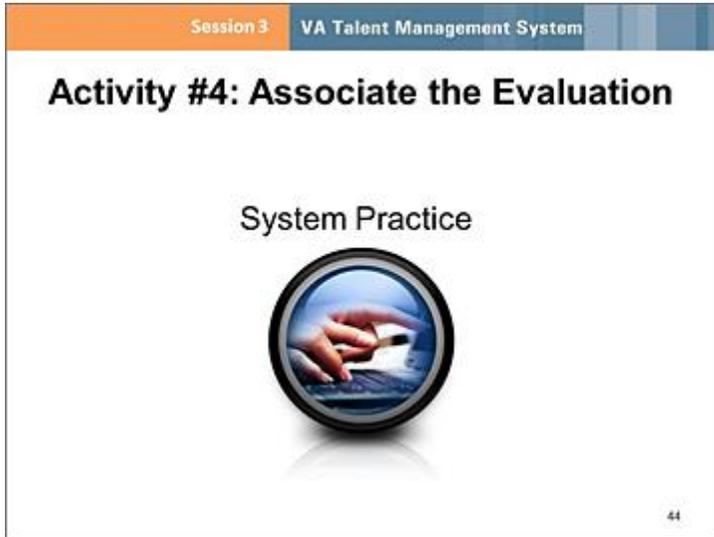
If the training program is effective, there will be a demonstrative increase in knowledge when the two exam results are compared.



43

Notes:

Slide 43: Sample Learning Evaluation Report



Notes:

Slide 44: Activity #4: Associate the Evaluation



#### Activity #4: Associate the Evaluation

##### To associate pre- and post-exams:

1. Navigate to **Learning > Items**.
2. Search for and access an item record in edit mode.
3. Select **More** from the **Related** area.
4. Select the **Evaluations** tab.
5. In the **Learning Evaluation: Mastery of Content** section, select the drop-down menu for pre-exam and select the desired exam.
6. Select the drop-down menu for post-exam 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.
7. Select **Apply Changes**.



The Job Aid: Associate Pre- and Post-Exams—Learning Evaluation is available in the VA TMS.

Session 3 VA Talent Management System

## Knowledge Check

Within an Item Record, which of these best represents the location to associate a survey with an item?

- a) Related Area > More > Evaluations
- b) Area > Summary
- c) Actions Area > Schedule
- d) Related Area > Prerequisites



45

Notes:

Slide 45: Knowledge Check

Session 3 VA Talent Management System

## Questions?

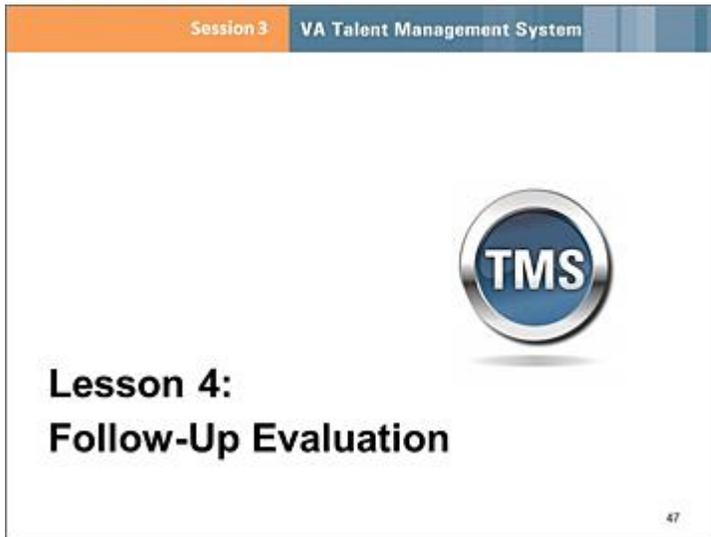


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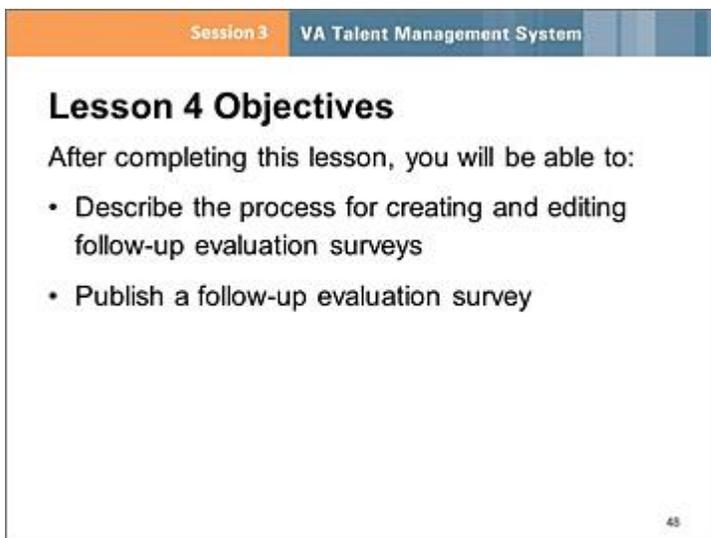
Slide 46: Questions?

## 1.5 Lesson 4: Follow-Up Evaluation



Notes:

Slide 47: Lesson 4: Follow-Up Evaluation



Notes:

Slide 48: Lesson 4 Objectives

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## Follow-Up Evaluation

- Follow-up evaluations attempt to answer whether learners' behaviors actually change as a result of new learning
- Functionally, the creation of a follow-up evaluation is the same as an item evaluation questionnaire survey

49

Notes:

Slide 49: Follow-Up Evaluation

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## Questions for Follow-Up Evaluations

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

**Before:**

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

**Once reworded:**

- *How often* did the representative open each customer dialogue with a product benefit statement, followed by a request to proceed?

50

Notes:

Slide 50: Questions for Follow-Up Evaluations



Notes:

Slide 51: Activity #5: Create the Follow-Up Evaluation



## Activity #5: Create the Follow-Up Evaluation

**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 evaluation survey. You are responsible for creating the questions for the follow-up evaluation survey to be assigned to all users and supervisors. In the next activity, we will configure the survey.

**Task:** Using the previous labs in this course as a guide, complete the following tasks on your own:

1. Create a follow-up evaluation survey using the sample questions on the next page.
2. Write additional questions for each page of this survey. The comments question at the end of each page is an open-ended question type.

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

**Page 1 Title:** Rate your capability before the training. How did you deal with customer confrontation?

**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.

**Page 2 Title:** Rate your capability after the training: How are you now able to deal with customer confrontation?

**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.

Session 3 VA Talent Management System

## Configuration Options

- The follow-up evaluation 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 supervisor only, or both.
- A comments section can be added after each question for additional feedback.

52

Notes:

Slide 52: Configuration Options

Session 3 VA Talent Management System

## Activity #6: Configure the Follow-Up Evaluation

System Practice



53

Notes:

Slide 53: Activity #6: Configure the Follow-Up Evaluation



### Activity #6: Configure the Follow-Up Evaluation

1. Navigate to **Learning > Questionnaire Survey**.
2. Search for and select the follow-up survey just created in the activity.
3. Select the **Options** tab.
4. 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.
5. Select the follow-up survey participants (employee, supervisor, or both).
6. Select **option to include comments** field for each question.
7. Select **Apply Changes**.
8. Select the **Notifications** tab.
9. If necessary, edit body of notification message.
10. Select **Apply Changes**.
11. If necessary, select **Browse** to add an attachment to notification.
12. Select **Apply Changes**.
13. Select the **Questions** tab.
14. Select **Preview** and then select **Draft** from drop-down menu.
15. Select **Close** to close preview of survey.
16. Select **Publish**. The survey is now ready for use.



The Job Aid: Follow-up Evaluation Survey is available in the VA TMS.

**Scenario:** The online course on how to deal with customers, conflict, and confrontation is ready to be released to users. You have created the follow-up evaluation survey questions, and configured the survey to be assigned to all users and supervisors 120 days after the course is completed, with seven (7) days to complete. Now associate the survey with the online item.

**Task:** Using the previous labs in this course as a guide, complete the following task on your own.

- a) Associate the follow-up survey with the online item

The next activity will introduce how to configure the automatic process to trigger the evaluation.

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## Knowledge Check

If the same kind of survey is already associated with an item, \_\_\_\_\_.

- a second survey can be associated with the item after a set date
- 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
- additional surveys can be associated with the item at any time
- the system will not allow additional surveys to be associated with the item

55

Notes:

Slide 54: Knowledge Check

Session 3 VA Talent Management System

## Questions?

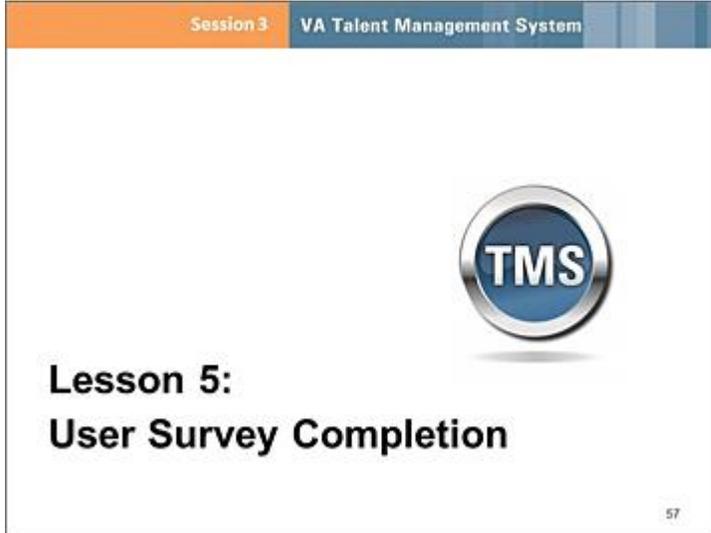


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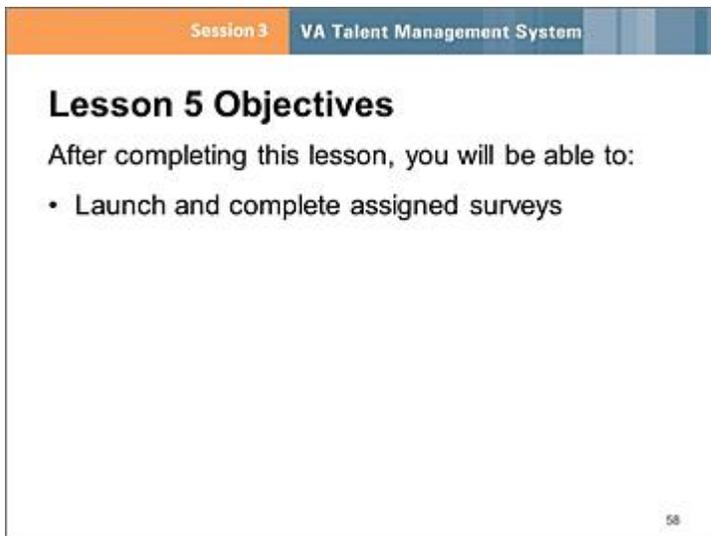
Slide 55: Questions?

## 1.6 Lesson 5: User Survey Completion



Notes:

Slide 56: Lesson 5: User Survey Completion



Notes:

Slide 57: Lesson 5 Objectives

Session 3 VA Talent Management System

## Survey Completion

When a survey is assigned to a user, he or she will receive an e-mail and the survey displays in the user's To-Do List.



59

Notes:

Slide 58: Survey Completion

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## Survey Completion Last Page

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 at a later time.



60

Notes:

Slide 59: Survey Completion Last Page

Session 3 VA Talent Management System

## Knowledge Check

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 warning message to complete the question
- An asterisk next to the survey in his or her Learning History
- An e-mail alerting the user of the omission and instructions explaining how to re-access the survey if necessary
- Nothing—the survey will submit as is



61

Notes:

Slide 60: Knowledge Check

Session 3 VA Talent Management System

## Questions?

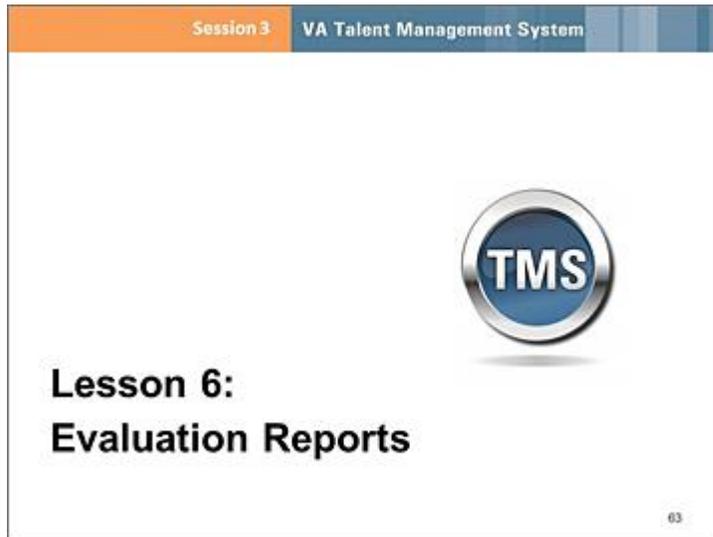


62

Notes:

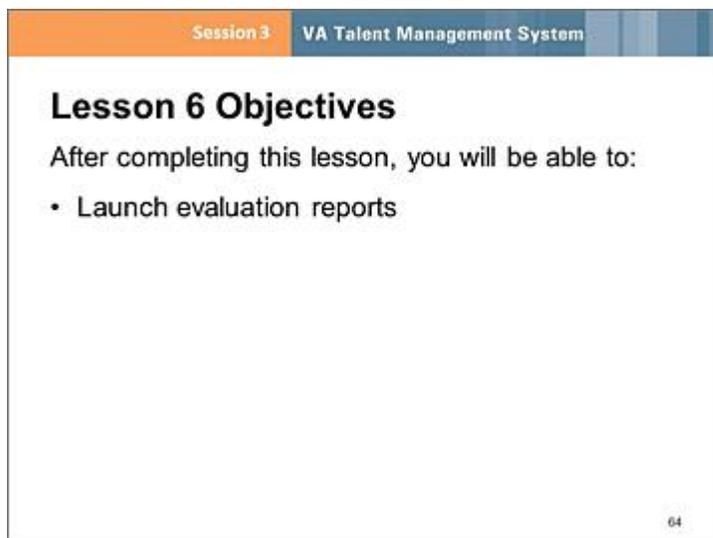
Slide 61: Questions?

## 1.7 Lesson 6: Evaluation Reports



Notes:

Slide 62: Lesson 6: Evaluation Reports



Notes:

Slide 63: Lesson 6 Objectives

Session 3 VA Talent Management System

## Item Evaluation Reports

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

65

Notes:

Slide 64: Item Evaluation Reports

Session 3 VA Talent Management System

## Item Evaluation Report

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



The screenshot displays a survey titled 'End of Course Survey (ECS) (1)'. It shows two questions with their respective response distributions:

**Question 6:** I find this course material interesting and easy to follow.

Response	Count	Percentage
1 - Somewhat Disagree	1	9.1%
2 - Somewhat Agree	7	63.6%
3 - Agree	4	36.3%
<b>Total Respondents</b>	<b>11</b>	

**Question 7:** The instructor's presentation style enhanced my learning experience.

Response	Count	Percentage
1 - Disagree	0	0.0%
2 - Somewhat Agree	4	36.4%
3 - Agree	7	63.6%
<b>Total Respondents</b>	<b>11</b>	

66

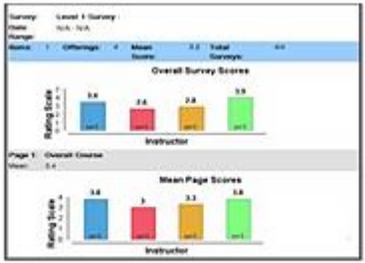
Notes:

Slide 65: Item Evaluation Report

Session 3 VA Talent Management System

## Item Evaluation by Instructor Report

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



The screenshot displays two bar charts. The top chart, 'Overall Survey Scores', shows mean scores for four instructors: Instructor 1 (3.8), Instructor 2 (3.4), Instructor 3 (2.8), and Instructor 4 (3.5). The bottom chart, 'Mean Page Scores', shows mean scores for the same four instructors: Instructor 1 (3.8), Instructor 2 (3.0), Instructor 3 (3.2), and Instructor 4 (3.8). The y-axis for both charts is 'Rating Scale' ranging from 1 to 5.

67

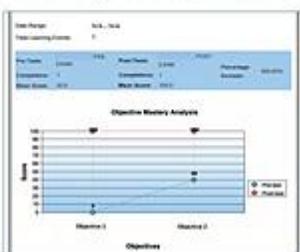
Notes:

Slide 66: Item Evaluation by Instructor Report

Session 3 VA Talent Management System

## 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.



The screenshot displays a table with columns for Pre-Test, Post-Test, Pre-Test %, Post-Test %, and Improvement. Below the table is a line graph titled 'Objective Mastery Analysis' showing mastery percentages for two objectives, Objective 1 and Objective 2, comparing Pre-Test (blue line) and Post-Test (red line) results. The y-axis is 'Mastery' from 0 to 100.

68

Notes:

Slide 67: Learning Evaluation Report Example

Session 3 VA Talent Management System

## Follow-Up Evaluation Report

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

69

Notes:

Slide 68: Follow-Up Evaluation Report

Session 3 VA Talent Management System

## Follow-Up Evaluation by Individual Response Report

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

70

Notes:

Slide 69: Follow-Up Evaluation by Individual Response Report



Notes:

Slide 70: Activity #7: Report Search



### Activity #7: Report Search

**Optional:** If there is time left in the training session, have the participants look at these identified reports on their own, and report back to the group on how they might use them.

Session 3 VA Talent Management System

## Knowledge Check

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

- Post-test mean scores
- Pre-test and post-test mean scores
- Pre-test mean scores
- The grand mean



72

Notes:

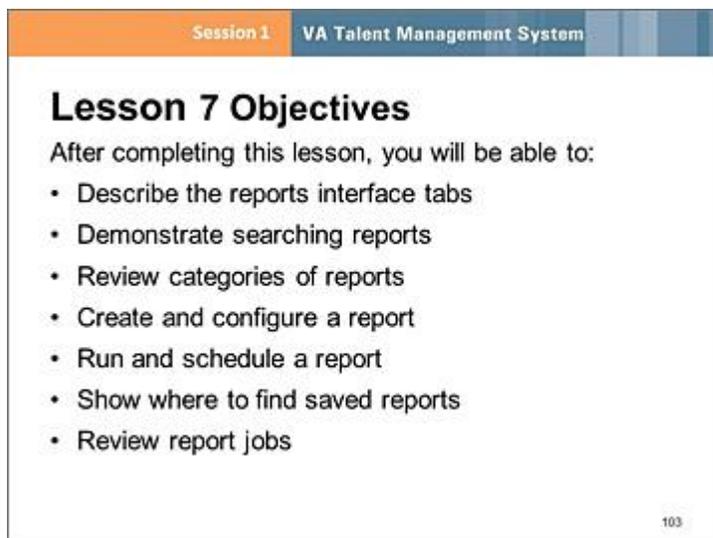
Slide 71: Knowledge Check

## 1.8 Lesson 7: Running Reports



Notes:

Slide 72: Lesson 7: Running Reports



Notes:

Slide 73: Lesson 7 Objectives

Session 1 VA Talent Management System

## Reports Overview

The VA TMS Reports interface is broken down into three main tabs:

- Saved Reports
- Reports
- Report Jobs



104

Notes:

Slide 74: Reports Overview

Session 1 VA Talent Management System

## Identifying the Reports Sections

The Run Report screen has two main sections:

1. Formatting
2. Criteria



108

Notes:

Slide 75: Identifying the Reports Sections



Notes:

Slide 76: Demonstration: Reports Overview



## Demonstration: Reports Overview

### Reports:

The most common use of the **Reports** tab is to run available reports within the system.

- To find the desired report, browse the provided list under the **Reports** tab or use the **Search** textbox and **Browse By** options on the left side of the Reports interface to search for reports by the title or description.
- To further assist in the search for a desired report, narrow the search results by checking the corresponding checkbox in the left-hand corner to select very specific categories of reports.
- Depending on your security privileges, you may also perform advanced report tasks from the **Reports** tab, such as changing the description of reports, importing and exporting reports and libraries for customization in Report Designer, and publishing and un-publishing reports.
- The functions that you are able to perform in the reports section are controlled by report workflows given to you by the system administrator.

### Saved Reports:

Once you create a saved report, you can access the report and run it without reentering filtering options.

- Saved reports are located under the **Saved Reports** tab and are specific to your admin account, meaning that saved reports are not shared among admins in the system.
- A saved report is very similar to a saved search in the VA TMS—only the admin who created the saved report is able to see it. In this way, the saved report is similar to a saved search or a bookmark. Only the admin who created these can access them in his/her admin account.

### Report Jobs:

The **Report Jobs** tab lists the current background report jobs which are automatically running in the background.

- Jobs are created under this tab when you schedule the report to occur on a recurring basis.
- On this tab, you can delete jobs from recurring or edit the schedule of when the report should run.

## Reports Sections:

### Section 1: Formatting

The top section of the **Run Report** screen contains the following formatting options:

- Modify the report title, header, and footer
- Determine the report destination (the location where the report engine returns the data). You can return the data to the browser or to a local file. When you select Browser, the report is displayed in the internet browser window. When Local File is selected, you must save the report to a local drive before you are able to open it.
- Determine the report format

### Section 2: Criteria

The selected report dictates the criteria displayed at the bottom of the **Run Report** screen. This section provides all the tools and functionality for searching. Report pages filter the data that the report returns using specific search fields. Many reports, however, also contain the following controls for filtering the data that you want to return:

- **Mask User IDs:** For security reasons, the VA TMS can mask the user IDs so they display as a series of asterisks. Check the checkbox to hide user IDs
- **Case Sensitive Search:** You can choose to perform a case-sensitive search or a case-insensitive search. Case-sensitive searches return data elements only when the characters and case match. Case-sensitive searches run faster than case-insensitive searches
- **Page Break between Records:** For longer reports, there is an option to insert page breaks between records
- **Filter by Criteria:** Some fields in the report pages contain a **Filter by Criteria** link. When you select the link, a page opens that contains multiple search fields in which you can select a set of data rather than a single data element. For example, you can return the set of users who are in the job location Washington, DC, rather than entering multiple users in the search field

### Filter information:

In this demonstration, we want to run a Learning History Report for all users who report to LMSUser. Specify the supervisor(s) in the user filter and apply that filter as a criterion in order for the report to be dynamic.

1. Access the **Learning History Report**.
2. Select the **Filter by criteria** icon next to the user criteria.
3. If necessary, select **Add/Remove Criteria** to add the supervisor search filter to the search screen.

4. The **Search Criteria** pop-up window displays.
5. Select the **Supervisors** checkbox.
6. Select **Select**.
7. The **Supervisor** search query displays.
8. To create the filter, select the **Filter by criteria** icon.
9. The **Create Filter by Supervisor** screen displays.
10. If you don't know the supervisor's ID, enter search criteria in the **Last Name** and **First Name** textboxes.
11. Select **Search**.
12. Your search results are displayed.
13. Select the **checkbox(es)** to select your choice(s).
14. Select **Add to Filter**. The criteria are added to the filter.
15. Select **Submit Filter**.
16. You are returned to your original search screen.
17. The supervisor search attribute has one (1) criterion selected for this filter.
18. You can modify this filter by selecting the **Filter by criteria** icon, or you can clear the filter by selecting the **Clear Filter** icon.
19. Select **Submit Criteria** to submit LMSUser as a criterion making the search dynamic.
20. You are returned to the original report screen, with a supervisor submitted as a criterion.
21. Now, if the subordinate assignment changes, the system automatically updates the search filter of this report, and runs a Learning History report on all users who report to LMSUser at the time the report is run.

Session 1 VA Talent Management System

## Running Reports in the VA TMS

Each report differs based on the data you are requesting and returns different data elements.

Common reports used by the VA:

- Performance Review Status report
- User Plan Status report

108

Notes:

Slide 77: Running Reports in the VA TMS

Session 1 VA Talent Management System



## Demonstration: Running Reports

109

Notes:

Slide 78: Demonstration: Running Reports



### Demonstration: Running Reports

1. Navigate to **Reports > Reports** tab.
2. Find the report you want to run. Use the **Search** textbox to look for reports by title or description, or browse the reports in the list provided.
3. Select the proper category to narrow your search results.
4. Read the provided report description to verify that it is the report you want to run.
5. If the report is a member of a report group (reports that run the same query but whose results are grouped differently), select the **Expand** icon to the left of the report title to expand the group and see the reports that are part of the group.
6. When you find the report that you wish to run, select its title to open the **Run Report** form.
7. Complete the **Run Report** form to provide the report with the information that it needs to return the data you wish to display.
8. After formatting and criteria options have been determined, select **Run Report** to run the report immediately in the format you choose. If you selected **Browser**, the report displays in a separate browser window. If **Local File** was selected, you must first save the file to a local drive before you are able to open it.

### FISMA Compliance Reports:

1. Navigate to **Reports > Reports** tab.
2. Enter **FISMA** in the search textbox.
3. Select the **FISMA Compliance Reports** link.
4. Select the **FISMA Domain Summary** link.
5. Make the desired changes to the formatting section.
6. Select **Schedule Job**.
7. Select **Run this job immediately, if allowable**.
8. Uncheck **Notify via email upon completion**.
9. Select **Finish**.
10. Select **Done**.

### User Plan Status Report:

1. Navigate to **Reports**.
2. Enter **User Plan Status** in the **Search** textbox.

3. Check the **Performance** category checkbox.
4. Select **Submit**.
5. Select the report title's link.
6. In this case, select to generate the **User Plan Status** report as a CSV file.
7. Select **User Plan Status (CSV)**.
8. The **User Plan Status (CSV)** screen displays.
9. Select the report destination from the drop-down menu.
10. Select the format for the report output.
11. You can select the users from a list by selecting the **Create Filter** icon to filter the search or by entering the ID into the **User ID** textbox.
12. Select **Submit Criteria** to return to the **Run Report** screen.
13. Specify the date range as desired for the report.
14. Select **Run Report**.
15. Select to open the file with Microsoft Excel or save the file locally.
16. Select **OK**.



Notes:

Slide 79: Activity #8: Running Reports



## Activity #8: Running Reports

### Run a report:

1. Navigate to **Reports > Reports** tab.
2. Find the **Training Compliance Detail** report for at least three users in the TRAIN domain. You can use the users you created from Session 1, or use the search filter to find other users.
3. When you find the report that you wish to run, select its title to open the **Run Report** form.
4. Select **HTML** as its Report Format.
5. Search and select at least three random users.
6. Uncheck the **Summary** checkbox.
7. After formatting and criteria options have been determined, select **Run Report** to run the report immediately.

Session 1 VA Talent Management System

## Create Saved Reports

- Keep the parameters you entered on the Run Report page
- It may be beneficial to submit criteria as filter options
- Stored under the **Saved Reports** tab of the Reports interface

111

Notes:

Slide 80: Create Saved Reports

Session 1 VA Talent Management System

## Running Report Jobs

You can schedule a report job three ways:

1. Run a job one time immediately
2. Run a job one time at a future date
3. Run a job on a recurring basis

The VA TMS provides two ways to receive the scheduled reports: by e-mail or by downloading a copy.

115

Notes:

Slide 81: Running Report Jobs

Session 1 VA Talent Management System

## Creating Recurring Reports

You can schedule recurring reports on a:

- Daily basis
- Weekly basis (must select day of week)
- Monthly basis (must select date of month)

You must select time of day for report to run.

116

Notes:

Slide 82: Creating Recurring Reports

Session 1 VA Talent Management System



## Demonstration: Saved and Recurring Reports

113

Notes:

Slide 83: Demonstration: Saved and Recurring Reports



## Demonstration: Saved and Recurring Reports

### Save a report:

1. Using the report you generated in the previous activity, add search and/or filtering criteria.
2. Select the **Save Report** button.
3. Enter a **Saved Report ID**.
4. Give the report an intuitive **description**. (**Note:** This will help you identify the report in the Saved Reports tab later.)
5. Select **Save**.
6. Retrieve the report from your **Saved Report** tab.

### Schedule a job:

1. Access the saved report.
2. From the **Run Report** page, select the **Schedule Job** button.
3. Select the radio button for **Schedule this job** to recur as follows:
4. Select the radio button for **Weekly**.
5. Select **Monday** from the drop-down options.
6. Enter the time, **1:00 p.m. EST**.
7. Ensure that the Time Zone is for America/New York (Eastern Standard Time).
8. Select the **Finish** button.



Notes:

Slide 84: Activity #9: Saved and Recurring Reports



## Activity #9: Saved and Recurring Reports

### Save a report:

7. Using the report you generated in the previous activity, add search and/or filtering criteria.
8. Select the **Save Report** button.
9. Enter a **Saved Report ID**.
10. Give the report an intuitive **description**. (**Note:** This will help you identify the report in the Saved Reports tab later.)
11. Select **Save**.
12. Retrieve the report from your **Saved Report** tab.

### Schedule a job:

9. Access the saved report.
10. From the **Run Report** page, select the **Schedule Job** button.
11. Select the radio button for **Schedule this job** to recur as follows:
12. Select the radio button for **Weekly**.
13. Select **Monday** from the drop-down options.
14. Enter the time, **1:00 p.m. EST**.
15. Ensure that the Time Zone is for America/New York (Eastern Standard Time).
16. Select the **Finish** button.



Notes:

Slide 85: Activity #10: Reports



## Activity #10: Reports

Now that you have had a chance to look at the features of reports, go into the VA TMS on your own and complete the following scenario. Take about five to ten minutes to complete this activity.

### Item Status Report (Grouped by Items) Scenario:

LMSADMIN.V0100 is the reports manager in the Train domain. Her domain manager just received a request from the Designated Learning Officer (DLO) to provide her with a list of names for everyone who has taken the Introduction to VA TMS Administrators Course (VA 3730266 ) and the Scheduling, Assignment, and Registrations Managers Course (VA 3730267) from 03/10/15 thru 04/10/15.

LMSADMIN.V0100 has been tasked to provide this information. After reviewing the task she decides she can provide the requested information to her domain manager by running an Item Status Report. She also decides that it is best to group the report by items.

Perform the required actions that LMSADMIN. V0100 must take to complete this task. Please save the report after completing this task.

Session 1 VA Talent Management System

## Knowledge Check

To look for reports by title or description, you can use the \_\_\_\_\_.

- a) Email text box
- b) Last Name text box
- c) Search text box
- d) User ID text box



115

Notes:

Slide 86: Knowledge Check

Session 1 VA Talent Management System

## Knowledge Check

Which of the following is an available report format?

- a) AVI
- b) PDF
- c) MP4
- d) WMV



116

Notes:

Slide 87: Knowledge Check

Session 1 VA Talent Management System

## Knowledge Check

Saved reports are available to whom?

- a) All admins
- b) All users
- c) The admin who created them
- d) The Scheduling Manager



117

Notes:

Slide 88: Knowledge Check

Session 1 VA Talent Management System

## Knowledge Check

To run a report in the background, you can do which of the following:

- a) Adjust the report format
- b) Create a saved report
- c) Bookmark a report
- d) Schedule a job



118

Notes:

Slide 89: Knowledge Check

Session 3 VA Talent Management System

## Session 3 Summary

- Describe the process for assessing effectiveness of items
- Describe the process for assessing user learning
- Demonstrate how to run training evaluation reports

73

Notes:

Slide 90: Session 3 Summary

Session 3 VA Talent Management System

## Questions?



74

Notes:

Slide 91: Questions?

Session 3 VA Talent Management System

## Course Evaluation Form

- Please take a few minutes to complete the course evaluation.
- Your feedback is important for improving future offerings of this course.



75

Notes:

Slide 92: Course Evaluation Form