



VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

May 2015

Table of Contents

1.0 About This Training.....	3
1.1 Training Purpose.....	3
1.2 Target Audience.....	3
1.3 Training Length	3
1.4 Participant Guide	3
1.4.1 Participant Guide Icons.....	4
1.5 Participant Preparation and Guidelines.....	4
1.5.1 Requirements	4
1.5.2 Demonstrations and System Practice Activities in VA TMS	4
1.5.3 Virtual Instructor-Led Training Guidelines	4
1.6 VA TMS Administrators Role-Based Training Sessions and Target Audiences	5
1.7 VA TMS Functions and Associated Roles	6
2.0 Training Content	7
2.1 Welcome	7
2.2 Lesson 1: Scheduled Offerings	10
2.3 Lesson 2: Segments.....	32
2.4 Lesson 3: Registration.....	46
2.5 Lesson 4: Record Learning Events	62
3.0 Terminology.....	76

1.0 About This Training

1.1 Training Purpose

The purpose of the VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers is to review concepts, define key terminology, and practice processes associated with scheduling instructor-led items in the VA TMS.

1.2 Target Audience

This session is intended for VA TMS administrators responsible for creating and modifying scheduled offerings and classes in the VA TMS. It is a requirement for the following target audience:

- Scheduling Managers
- Assignment Managers
- Registration Managers

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

**VA TMS Training for Scheduling Managers,
Assignment Managers, and Registration Managers**

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

VATMS Administrators Role-Based Training:
**VA TMS Training for Scheduling Managers,
Assignment Managers, and Registration Managers**



Notes:

Slide 2: VA TMS Administrators Role-Based Training

Scheduling Management VA Talent Management System

Session Agenda

- Welcome and Introductions
- Lesson 1: Scheduled Offerings
- Lesson 2: Segments
- Lesson 3: Registration
- Lesson 4: Record Learning Events
- Question and Answer

3

Notes:

Slide 3: Session Agenda

Scheduling Management VA Talent Management System

Session Objectives

At the end of this session, you should be able to:

- Create a scheduled offering of an instructor-led item
- Add, copy, and revise segments of scheduled offerings
- Manage resources for segments of scheduled offerings
- Use the Record Learning tool to record completed learning for users

4

Notes

Slide 4: Session Objectives

Scheduling Management VA Talent Management System

Introductions

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

5

Notes:

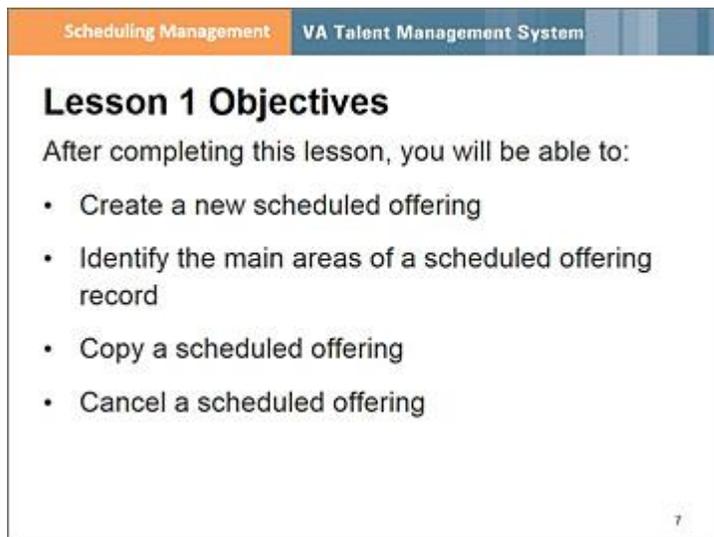
Session 5: Introductions

2.2 Lesson 1: Scheduled Offerings



Notes:

Slide 6: Lesson 1: Scheduled Offerings



Notes:

Slide 7: Lesson 1 Objectives

Scheduling Management VA Talent Management System

Scheduling Management

Scheduling management is a term used to describe the process of creating scheduled offerings within the VA TMS for instructor-led/blended items or schedule blocks.

8

Notes:

Slide 8: Scheduling Management

Scheduling Management VA Talent Management System

Scheduled Offering

Scheduled offerings are scheduled items used to manage resources, user registration, and course duration.

- Places an instance of the item on the calendar
- Allows resources to be associated to it
- Allows users to be registered into it

After creating instructor-led/blended items, the next step is to schedule them for a specific date, time, and location in order to track user registration.

9

Notes:

Slide 9: Scheduled Offering

Scheduling Management VA Talent Management System

Adding a New Scheduled Offering

- To add a new scheduled offering, select the item to schedule and determine a start date and time.
- Each scheduled offering is comprised of one or more segments. A segment is a block of time that can have resources assigned to it.
- Like items, scheduled offerings are made available to users via catalogs.

10

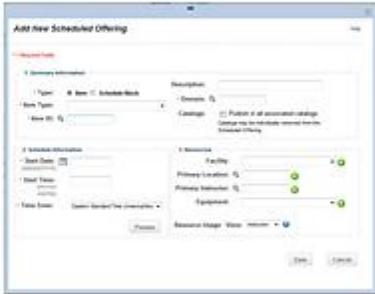
Notes:

Slide 10: Adding a New Scheduled Offering

Scheduling Management VA Talent Management System

Ways to Add a New Scheduled Offering

1. Add Scheduled Offering Quick Link
2. Learning > Scheduled Offering > Add New
3. Add Scheduled Offering in the Search field
4. From the Item Record, choose "Schedule" in the Actions area



10

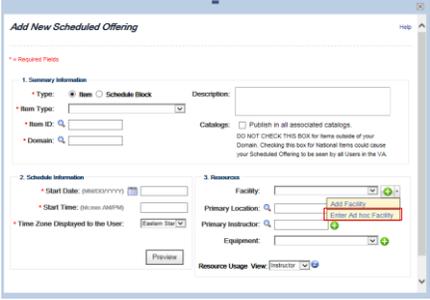
Notes:

Slide 11: Ways to Add a New Scheduled Offering

Scheduling Management VA Talent Management System

Ad Hoc Facilities

- The Add New Scheduled Offering page now has a feature for entering Ad Hoc Facilities.



12

Notes:

Slide 12: Ad Hoc Facilities

Scheduling Management VA Talent Management System

Ad Hoc Facilities (Cont'd)

- Scheduled offerings now support the assignment of an ad hoc facility for those offerings scheduled to take place at an external facility (e.g. hotel conference room).
- This is ideal when training is scheduled at locations that are not available as system records for re-use.

13

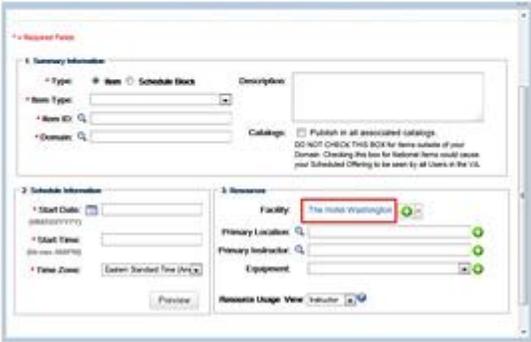
Notes:

Slide 13: Ad Hoc Facilities (Cont'd)

Scheduling Management VA Talent Management System

Delete Ad Hoc Facility

Admins can remove the ad hoc facility by selecting the link and then selecting **Delete**.



14

Notes:

Slide 14: Delete Ad Hoc Facility

Scheduling Management VA Talent Management System

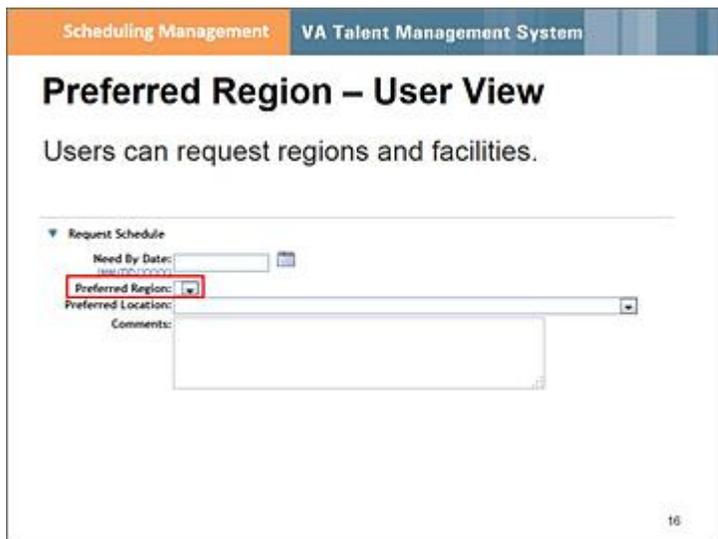
Preferred Region and Facility

- Users can now enter a preferred region and facility when requesting a scheduled offering.
- When region is selected, the facility list will default to those facilities in the selected region.
- No defined regions in VA TMS -- admins will need to identify and enter the information.
- Admins should **not** enable requests unless really necessary.

15

Notes:

Slide 15: Preferred Region and Facility



Notes:

Slide16: Preferred Region – User View



Notes:

Slide 17: Enable User Requests – Admin View

Scheduling Management VA Talent Management System

Item Requests Report

Admins can also run an Item Requests report which will generate a report to the point of contact.

- Item Requests
 - Item Requests Group By User
 - Item Requests Group By Request Reason
 - Item Requests Group By Item
 - Item Requests (CSV)
 - Item Requests Group By Request Date

The Item Requests report returns; for users and items; the users who have requested items but who have not yet...[more](#)

Learning

18

Notes:

Slide18: Item Requests Report

Scheduling Management VA Talent Management System

Filter Requests

Admins can filter the request list from the offering to facilitate registering the right people into the right offerings.



19

Notes:

Slide 19: Filter Requests

Scheduling Management VA Talent Management System

Equipment Search Defaults

- Equipment search defaults to location/facility on Add Scheduled Offering page.
- If equipment is not associated with the location/facility, all records will show unless there are domain restrictions.
- This feature will behave as it did in the past.

20

Notes:

Slide 20: Equipment Search Defaults

Scheduling Management VA Talent Management System

New Equipment Search Criteria

New search criteria is now available for equipment when adding a scheduled offering:

- **Availability** (can choose if available for entire offering)
- **Include Free Floating** (not associated with any other resources)

21

Notes:

Slide 21: New Equipment Search Criteria

Scheduling Management VA Talent Management System

Search Equipment – Version B1305

Search Equipment

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

Equipment ID: Starts With [] []

Description: Starts With [] []

Domains: Starts With [] []

Equipment Type: Starts With [] []

Equipment Status: Starts With [] []

Location: Starts With [] []

Facility: Starts With [] []

[Add/Remove Criteria](#) Search Reset

22

Notes:

Slide 22: Search Equipment – Version B1305

Scheduling Management VA Talent Management System

Search Equipment – Version B1311

Search Equipment

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

Equipment ID: Starts With [] []

Description: Starts With [] []

Availability: Available for Entire Scheduled Offering All

Include Free Floating: Yes No

Domains: Starts With [] []

Equipment Type: Starts With [] []

Equipment Status: Starts With [] []

Location: Starts With [] []

Facility: Starts With [] []

[Add/Remove Criteria](#) Search Reset

23

Notes:

Slide 23: Search Equipment – Version B1311



Notes:

Slide 24: Add New Scheduled Offering



Demonstration: Add New Scheduled Offering

1. Log in to the VA TMS.
2. Select the **Learning** tab.
3. Select **Scheduled Offerings** tab on the left-hand side of the screen.
4. Select **Add New**. This opens the **Add New Scheduled Offering** window.
5. Select the **Item type** radio button.
6. Select the **Item ID magnifying glass** icon to search for the item to schedule.
7. Select an item from your search results.
8. Enter a **description** for this scheduled offering.
9. Specify a **domain** for the scheduled offering.
10. Check the **Publish in all associated catalogs** checkbox. **NOTE:** If you select the Publish in all associated catalogs checkbox, when you save the new scheduled offering the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes the scheduled offering visible and possibly available for users to self-register.
11. Select a **start date, start time, and time zone**. **NOTE:** The scheduled start date and time and the scheduled end date and time will appear below the scheduled information.
12. Select **Preview** to view the basic information for the offering (Optional).
13. Select the **drop-down menu** next to the plus sign by **Facility**.
14. Select **Enter Ad Hoc Facility**.
15. Enter information for the ad hoc facility on this page.
16. When you are finished, select **Save**.
17. Select **Apply Changes**.
18. Select “**X**” in the upper right-hand corner to return to the Add Scheduled Offering page.
19. You can remove what was added by selecting the link to the ad hoc facility and then selecting **Delete**.
20. If applicable, select the other resources associated with the scheduled offering: **location, instructor, and equipment**. Show the new equipment search criteria.

NOTE: Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.

21. Select **Save**.
22. If there are any warnings, the **Warning Details** screen displays. If this occurs, select **Yes** to continue.
23. The Schedule Offering record displays allowing you to make further configurations.
24. For use in future activities, record the system-generated **Scheduled Offering ID**, which is the numeric value located in the upper right corner of the Core area.



The Job Aid: Creating Scheduled Offerings is available in the VA TMS.



Notes:

Slide 25: System Login



Notes:

Slide 26: Activity #1: Add New Scheduled Offering



Activity #1: Add New Scheduled Offering

1. Log in to the VA TMS.
2. Select the **Learning** tab.
3. Select **Scheduled Offerings** tab on the left-hand side of the screen.
4. Select **Add New**. This opens the **Add New Scheduled Offering** window.
5. Select the **Item type** radio button.
6. Select the **Item ID magnifying glass icon** to search for the item to schedule.
7. Select an item from your search results.
8. Enter a **description** for this scheduled offering.
9. Specify a **domain** for the scheduled offering.
10. Check the **Publish in all associated catalogs** checkbox. **NOTE:** If you select the Publish in all associated catalogs checkbox, when you save the new scheduled offering the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes the scheduled offering visible and possibly available for users to self-register.
11. Select a **start date, start time, and time zone**. **NOTE:** The scheduled start date and time and the scheduled end date and time will appear below the scheduled information.
12. Select **Preview** to view the basic information for the offering. (Optional)
13. Select the **drop-down menu** next to the plus sign by **Facility**.
14. Select **Enter Ad Hoc Facility**.
15. Enter information for the ad hoc facility on this page.
16. When you are finished, select **Save**.
17. Select **Apply Changes**.
18. Select “**X**” in the upper right-hand corner to return to the Add Scheduled Offering page.
19. You can remove what was added by selecting the link to the ad hoc facility and then selecting **Delete**.
20. If applicable, select the other resources associated with the scheduled offering: **location, instructor, and equipment**. View the new equipment search criteria.

NOTE: Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.
21. Select **Save**.

22. If there are any warnings, the **Warning Details** screen displays. If this occurs, select **Yes** to continue.
23. The Schedule Offering record displays allowing you to make further configurations.
24. For use in future activities, record the system-generated **Scheduled Offering ID**, which is the numeric value located in the upper right corner of the Core area.



The Job Aid: Creating Scheduled Offerings is available in the VA TMS.



Notes:

Slide 27: Scheduled Offering Record Main Areas



Notes:

Slide 28: Demonstration: Using Core, Actions, and
Related Areas of a Scheduled Offering Record



Demonstration: Using Core, Actions, and Related Areas of a Scheduled Offering Record

1. Log in to the VA TMS.
2. Verify that the **Admin** tab is selected.
3. Select the **Learning** tab.
4. Select **Scheduled Offerings** tab on the left-hand side of the screen.
5. Select **Search**.
6. Select a scheduled offering from the list of results.
7. Once the scheduled offering record is displayed, describe the three main areas of the scheduled offering record as follows:

Core Area, located in the upper part of the scheduled offering

You can use the Core area of the selected scheduled offering record to update the basic attributes of the record (summary information). These attributes could include, for example, the offering description, domain, facility, registration settings, and any other fields deemed required by the global system administrators or added based on your Personalized field preferences.

Select the **View All** link to see additional settings for the scheduled offering, including title, description, summary, extended summary, physical schedule, and registration.

Actions Area, located to the right of the Core Area

In the Actions area, you can bookmark, copy, cancel, or delete a scheduled offering. You can also send notifications to users about scheduled offerings. If you select the **View Roster** link, this quickly generates the Roster/Sign-In Sheet report that shows all of the users who are enrolled for that scheduled offering.

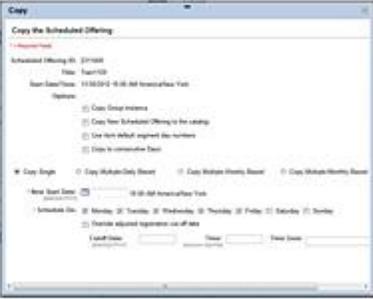
Related Area, located to the left of the Core Area

The Related area contains additional information regarding the scheduled offering, including registration information, associated catalogs, and segment details.

Scheduling Management VA Talent Management System

Copy a Scheduled Offering

- Allows you to create duplicates
- Copies resources and registration parameters
- Can be scheduled to occur once or in recurrence



29

Notes:

Slide 29: Copy a Scheduled Offering

Scheduling Management VA Talent Management System



Demonstration: Copying and Canceling Scheduled Offerings

30

Notes:

Slide 30: Demonstration: Copying and Canceling
Scheduled Offerings



Demonstration: Copying and Canceling Scheduled Offerings

Copying a Scheduled Offering

1. Log in to the VA TMS.
2. Select the **Learning** tab.
3. Select **Scheduled Offerings** tab on the left-hand side of the screen.
4. Search for and select a scheduled offering. **Note:** This demo can be completed with the scheduled offering that was created in the last demo.
5. Select the **Copy** link in the Actions area of the record.
6. Select the **Copy Multiple–Monthly Based** radio button.
7. Enter a new start date in the **New Start Date** textbox.
8. Enter “**1**” in the Schedule every ___ month(s) field.
9. Select the **End after ___ schedules** radio button.
10. Enter “**3**” in this field.
11. Check the **Include Registration Cut-off Date** checkbox.
12. Select **Next**.
13. On the Confirmation screen, check the **Send Notification** checkbox.
14. Select **Copy**. Note the new scheduled offering IDs and start dates.

Canceling a Scheduled Offering

1. Enter search criteria to search for and locate one of the scheduled offerings just copied.
2. Select **Cancel** from the Actions area of the Scheduled Offering record.
3. Select **Next**.
4. Admins don't need to complete **Step 2: Edit Realized Costs** because this feature is not currently available in the VA TMS.
5. Select **Inactivate the Scheduled Offering**.
6. Select **Next** again.
7. On the Confirmation screen, select **Finish**.
8. On the Finished Confirmation Page, select **OK**.



Notes:

Slide 31: Activity #2: Copy and Cancel Scheduled Offerings



Activity #2: Copy and Cancel Scheduled Offerings

Copy a Scheduled Offering

1. Log in to the VA TMS.
2. Select the **Learning** tab.
3. Select **Scheduled Offerings** tab on the left-hand side of the screen.
4. Search for and select the scheduled offering you created in Activity #1..
5. Select the **Copy** link in the Actions area of the record.
6. Select the **Copy Multiple–Monthly Based** radio button.
7. Enter a new start date in the **New Start Date** textbox.
8. Enter “**1**” in the Schedule every ___ month(s) field.
9. Select the **End after ___ schedules** radio button.
10. Enter “**3**” in this field.
11. Check the **Include Registration Cut-off Date** checkbox.
12. Select **Next**.
13. On the Confirmation screen, check the **Send Notification** checkbox.
14. Select **Copy**. Note the new scheduled offering IDs and start dates.

Cancel a Scheduled Offering

1. Enter search criteria to search for and locate one of the scheduled offerings just copied.
2. Select **Cancel** from the Actions area of the Scheduled Offering record.
3. Select **Next**.
4. Admins don't need to complete **Step 2: Edit Realized Costs** because this feature is not currently available in the VA TMS.
5. Select **Inactivate the Scheduled Offering**.
6. Select **Next** again.
7. On the Confirmation screen, select **Finish**.
8. On the Finished Confirmation Page, select **OK**.

Scheduling Management VA Talent Management System

Knowledge Check

A scheduled offering is:

- a) An instance of an item placed on a learning calendar
- b) An assignable unit that a user must complete
- c) A grouping of curricula
- d) None of the above



32

Notes:

Slide 32: Knowledge Check

Scheduling Management VA Talent Management System

Knowledge Check

What are the main areas of a scheduled offering record?

- a) Home, Learning, and Status
- b) Curricula, Actions, and Records
- c) Home, Items, and Related
- d) Core, Actions, Related



33

Notes:

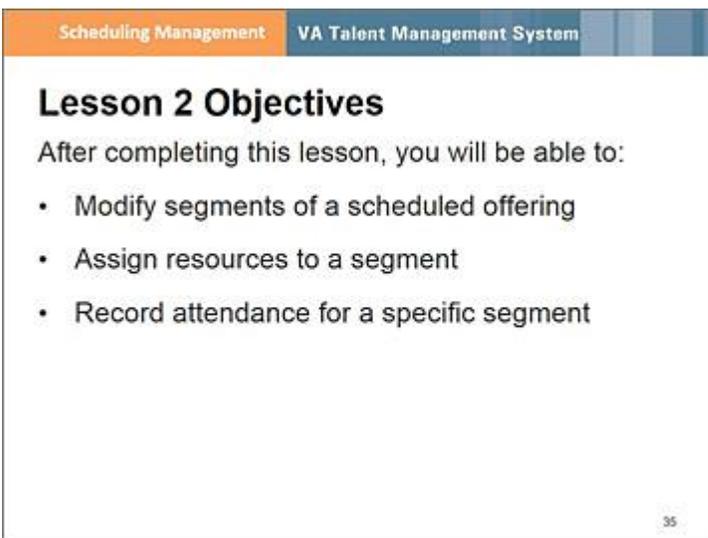
Slide 33: Knowledge Check

2.3 Lesson 2: Segments



Notes:

Slide 34: Lesson 2: Segments



Notes:

Slide 35: Lesson 2 Objectives

Scheduling Management VA Talent Management System

Segments

- A segment is a block of time within a scheduled offering primarily used for resource allocation
- If a user is registered in a scheduled offering, he/she is registered in all segments
- Segments contain any applicable resources, such as locations, equipment, and instructors

36

Notes:

Slide 36: Segments

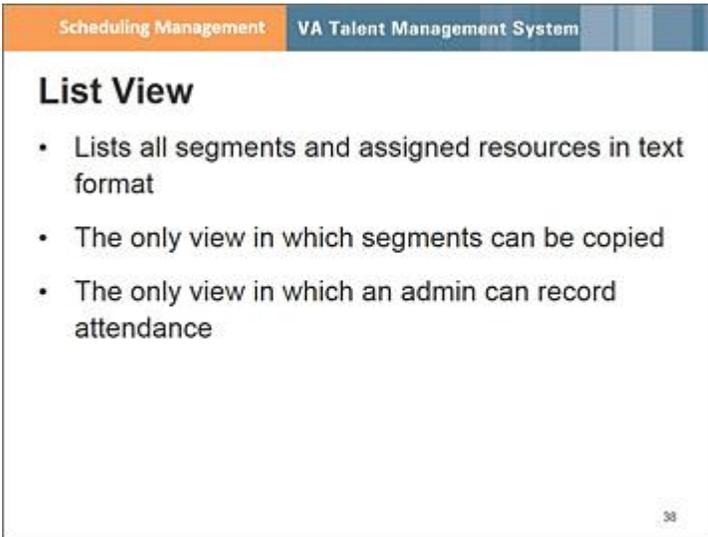
Scheduling Management VA Talent Management System

Two Views in the Segment Section

The screenshot displays two views of the Segment Section in the VA TMS. The top view is the 'List view', which shows a table of segments with columns for Description, Primary Location, Primary Instructor, Actions, and Register. A red box highlights the 'Filter' button, and a red arrow points to the 'List view' label. The bottom view is the 'Calendar view', which shows a calendar grid for the week of November 4-10, 2012, with two green segments highlighted. A red arrow points to the 'Calendar view' label. The slide number '37' is visible in the bottom right corner.

Notes:

Slide 37: Two Views in the Segment Section



Scheduling Management VA Talent Management System

List View

- Lists all segments and assigned resources in text format
- The only view in which segments can be copied
- The only view in which an admin can record attendance

38

Notes:

Slide 38: List View



Scheduling Management VA Talent Management System

Calendar View

- Shows segments in graphical calendar format
- Segment times and dates can be altered by dragging and resizing segment boxes
- View can be altered to reflect day, week, or monthly view

39

Notes:

Slide 39: Calendar View

Scheduling Management VA Talent Management System

Resources Assigned to Segments

- A segment can have multiple resources of the same type, such as two instructors
- Once a resource is assigned to a segment, it is booked
- If another admin attempts to schedule the resource during the same timeframe, VA TMS will alert him/her that there is a conflict

40

Notes:

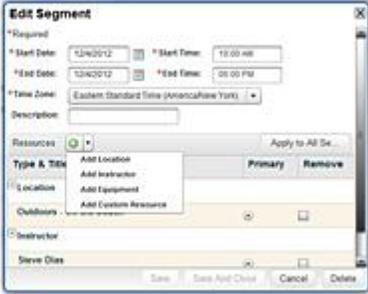
Slide 40: Resources Assigned to Segments

Scheduling Management VA Talent Management System

Adding Resources to a Segment

You can set up scheduled offering resources in the VA TMS. Resources include:

- Instructors
- Equipment
- Materials
- Facilities
- Locations



41

Notes:

Slide 41: Adding Resources to a Segment

Scheduling Management VA Talent Management System

Custom Resources Search Defaults

- Searches on custom resources will default to the assigned custom resource types on the Edit Segment of Scheduled Offering page.
- If custom resource is not associated with the facility or location, all records will show unless there are domain restrictions that apply.

42

Notes:

Slide 42: Custom Resources Search Default

Scheduling Management VA Talent Management System

Add Custom Resource

Add Segment

* Required

* Start Date: MM/DD/YYYY * Start Time: hh:mm AMPM

* End Date: MM/DD/YYYY * End Time: hh:mm AMPM

* Time Zone: Eastern Standard Time (America/New York)

Description:

Resources: [Add Location] [Add Instructor] [Add Equipment] [Add Custom Resource] [Apply to A...]

Type & Title Primary Remove

Save Save And ... Cancel

43

Notes:

Slide 43: Add Custom Resource

Scheduling Management VA Talent Management System

Record Attendance

- Select the **Attendance** link next to any segment displayed in List view.



44

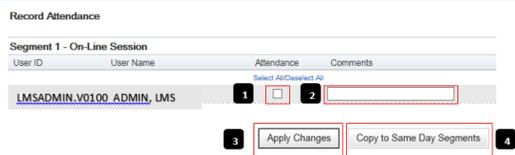
Notes:

Slide 44: Record Attendance

Scheduling Management VA Talent Management System

Record Attendance

- Select **Attendance** checkbox to record attendance.
- Enter **comments**, if desired.
- Select **Apply Changes**.
- For multiple segments, select **Copy to Same Day Segments**.



45

Notes:

Slide 45: Record Attendance (cont'd)



Notes:

Slide 46: Demonstration: Segments



Demonstration: Segments

1. Log in to the VA TMS.
2. Select the **Learning** tab.
3. Select **Scheduled Offerings** tab on the left-hand side of the screen.
4. Search for and select a scheduled offering you created previously.
5. Now that the scheduled offering record is displayed, let's discuss the Segment areas.

Assigning Instructors

Once the instructor is identified, he or she can be assigned to the segment(s) within a scheduled offering. To do that, select **Segments**, select **Add New Segments**, and then select **Add Instructor** from the drop-down menu. The VA TMS returns all instructors in the search results. The search results include a column that displays the resource availability, which can help when determining the segment resource allocation:

- Not Available
- Available for entire scheduled offering
- Available for current segment
- Blank (when segment information is not available)

NOTE: The search for authorized instructors is an option per Item—so it's not necessary to clear out the item information from the filter if you want to search for an instructor who is not specifically authorized to teach this item. To perform “search and select” search filters, select the **Search** tab, enter your search criteria, then select **Search**.

Assigning Locations

When the training location has been identified, you can assign it to the segment(s) within a scheduled offering. To assign locations to segments, select **Add New Segments**, **Add Resources** then **Add Location** from the drop-down menu. The VA TMS returns all locations in the search results.

Assigning Equipment

Equipment is any reusable resource that is used in the delivery of scheduled offerings. These include overhead projectors, television monitors, classroom laptops, etc. Equipment can be associated with locations and facilities. You may schedule equipment that does not come with the location that has been scheduled. To schedule these additional resources, select the **Add Resources** button for the segment in which you want to schedule them.

Resource Conflicts

If you select a resource that is already scheduled for the same time in which you are trying to schedule it, a warning message displays. You can view the conflict and make a decision to

continue and schedule that resource or search for and select another. **Note:** You may need to “force” a conflict to show users how this feature works.

Apply to All Segments

In **Edit Segment**, you can add all of the resources that will be needed to deliver the segment. You can also select **Apply to All Segments** to copy the resources that you have applied to the segment that you’re modifying to all other segments of the scheduled offering. Then select **Save & Close**.

Additional Segments

Once a scheduled offering is created, you have the ability to add or remove segments from that scheduled offering. The default segment structure is established through the Segments tab of the item record. You can add a new segment to the scheduled offering by either selecting the **Add New Segments** button or by selecting the **Copy Segments** icon. The Copy Segments icon is only available in list view.



Notes:

Slide 47: Activity #3: Segments



Activity #3: Segments

Assigning Resources to Segments

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1.
3. Select **Search**.
4. Select the **scheduled offering ID** link to access the scheduled offering in edit mode.

Note: If you haven't navigated away from the scheduled offering from the previous activity, you do not need to search for it. If you have, you can also access the scheduled offering record from your Recents panel.

5. Select the **Segments** tab from the Related area.
6. In list view, select the segment link.
7. For the selected segment, select a primary instructor.
8. Select **Add Resources**.
9. Select **Add Instructor**.
10. Select the corresponding checkbox to select the instructor to add for the segment.
11. Select **Add**.
12. Identify the primary instructor and select the corresponding radio button in the Primary column.
13. Select **Save**. **NOTE:** When adding an instructor, the VA TMS returns only instructors who are authorized to teach this item.
14. Select a primary location.
15. Select **Save and Close**. **NOTE:** If there are multiple segments and one or more of the segments do not have a primary instructor and/or location designated, the system displays a warning pop-up box. Select **OK** to continue.

Adding a Second Instructor to a Segment

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1 and select Search.
3. Select the **scheduled offering ID** link to access the scheduled offering in edit mode.
4. Select the **Segments** tab from the Related area.
5. In calendar view, select the segment you want to add a second instructor.
6. Select **Add Resources** and select **Add Instructor** from the drop-down menu.

7. Select the corresponding checkbox to select the second instructor to add for the segment.
8. Select **Add**.
9. Identify the primary instructor and select the corresponding radio button in the Primary column.
10. Select **Save**.
11. View all the instructors scheduled to teach during the segment. Note the primary instructor.
12. Select **Cancel** to return to the calendar or list view. **NOTE:** If you did not select **Save**, in step 12, select **Save and Close** to save your changes and return to the segment calendar or list view.

Adding Segments to a Scheduled Offering

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1.
3. Select **Search**.
4. Select the **scheduled offering ID** link to access the scheduled offering in edit mode.
5. Select the **Segments** tab from the Related area.
6. Select the **Add New Segments** button.
7. Enter the segment information:
 - Start date and time
 - End date and time
 - Segment description (optional but recommended)

Copy Daily Segments

1. Navigate to the segment you just created.
2. Select the **List View** icon.
3. Next to the segment just created, select the **Copy Segments** icon.
4. Enter the number of times to copy the segment. **NOTE:** The system is actually copying all segments scheduled on the same date of the segment you selected, not just the segment you selected. This will create each duplicate segment(s) on a different day. You can modify the new segment dates, times, and time zones once they are created.
5. Select **Copy**.
6. View the new segment(s). **NOTE:** The resources assigned to the original segment are carried over to the new segment(s).
7. Modify the description for each new segment.
8. Select **Save and Close**.
9. Change the end time of one of the new segments.

10. Select **Save and Close**.



The Job Aid: Creating Scheduled Offerings is available in the VA TMS.

Scheduling Management VA Talent Management System

Knowledge Check

What are the two different ways you can view segments?

- a) Limited view and Extended view
- b) Short view and Detailed view
- c) List view and Calendar view
- d) Resource view and Schedule view



47

Notes:

Slide 48: Knowledge Check

Scheduling Management VA Talent Management System

Knowledge Check

List three types of resources that can be assigned to a segment.



48

Notes:

Slide 49: Knowledge Check

2.4 Lesson 3: Registration



Notes:

Slide 50: Lesson 3: Registration



Notes:

Slide 51: Lesson 3 Objectives



Scheduling Management VA Talent Management System

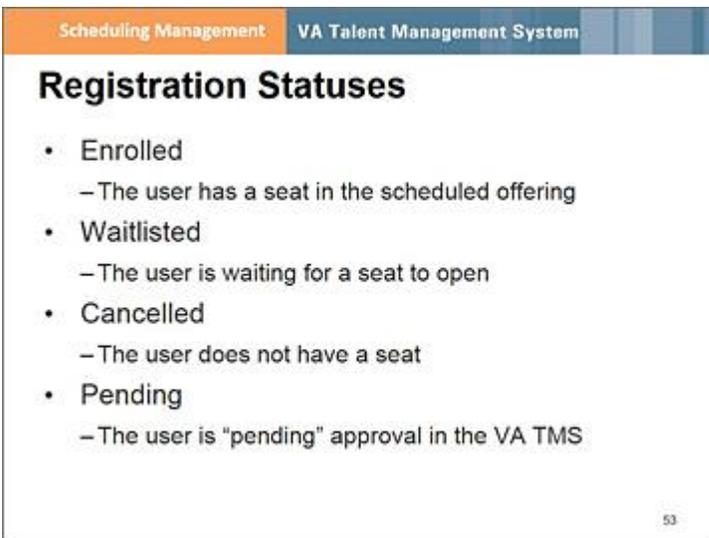
How Users Register

- Self-Register
- Supervisor registers
- Admin registers

52

Notes:

Slide 52: How Users Register



Scheduling Management VA Talent Management System

Registration Statuses

- Enrolled
 - The user has a seat in the scheduled offering
- Waitlisted
 - The user is waiting for a seat to open
- Cancelled
 - The user does not have a seat
- Pending
 - The user is "pending" approval in the VA TMS

53

Notes:

Slide 53: Registration Statuses



Notes:

Slide 54: Demonstration: Registration



Demonstration: Registration

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for the scheduled offering you've been using throughout the session (Use "Exact" and the Scheduled Offering ID, or just use Recents or Bookmarks).
3. Select the **Registration** section of the Related area.
4. Select the **Add Users** button and choose **Add Users**.
5. Enter search criteria to search for users; User ID contains "Train."
6. Select **Search**.
7. Select the **Add** checkbox next to the user you want to register.
8. Select **Add**.
9. Confirm that the user has been added by verifying the user's name has been added in the Enrolled section.



The Job Aid: Registration Management is available in the VA TMS.



Notes:

Slide 55: Activity #4: Registration



Activity #4: Registration

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for the scheduled offering you've been using throughout the session (Use "Exact" and the Scheduled Offering ID, or just use Recents or Bookmarks).
3. Select the **Registration** section of the Related area.
4. Select the **Add Users** button and choose **Add Users**.
5. Enter search criteria to search for users; User ID contains "Train."
6. Select **Search**.
7. Select the **Add** checkbox next to the user you want to register.
8. Select **Add**.
9. Confirm that the user has been added by verifying the user's name has been added in the Enrolled section.



The Job Aid: Registration Management is available in the VA TMS.

Scheduling Management VA Talent Management System

Control Supervisors' Rights to Enroll Users

- Previously, a single setting called "User Self Registration" on the Item and Scheduled Offering record controlled users' rights to register.
- A similar setting has been added for supervisors in the Item Record summary information section.
- If Supervisor Registration is set to **Yes**, then the supervisor can register users for training. If set to **No**, then the supervisor cannot register users.
- This feature defaults to **Yes** on all new items.

56

Notes:

Slide 56: Control Supervisors' Rights to Enroll Users

Scheduling Management VA Talent Management System



Demonstration: Controlling Supervisors' Rights to Enroll Users

57

Notes:

Slide 57: Demonstration: Controlling Supervisors'
Rights to Enroll Users



Demonstration: Controlling Supervisors' Rights to Enroll Users

From the admin home page:

1. Select **Learning**.
2. Select **Scheduled Offerings**.
3. Enter search criteria to search for the scheduled offering you've been using throughout the session (Use "Exact" and the Scheduled Offering ID, or just use Recents or Bookmarks).
4. Select **View All** in the Core area of the record.
5. Scroll down to the **Supervisor Registration** field and select **Yes** from the drop-down list.
6. Scroll down to the **Self Registration** field and select **Yes** from the drop-down list.
7. Select **Save**.

Scheduling Management VA Talent Management System

Slots

- Slots allow you to reserve seats in a scheduled offering without having to register specific users
- As slots are reserved, the number of open seats decreases by that number

56

Notes:

Slide 58: Slots

Scheduling Management VA Talent Management System



Demonstration: Slots

57

Notes:

Slide 59: Demonstration: Slots



Demonstration: Slots

NOTE: If short on time, you can demo slots with the previous Registration demonstration.

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for the scheduled offering created (Use “Exact” and the Scheduled Offering ID you created, or just use Recents or Bookmarks).
3. Select the **Registration** section of the Related area.
4. Select **Add Slots** from the drop-down menu.
5. In the Add Slots window, select the **Organization ID** and the **number of slots**. Then select **Save**.
6. Once slots are reserved, the number of open seats decreases by that number. For example, if there are 15 seats available in the class and the admin reserves three slots, 12 seats remain available for other users.



Notes:

Slide 60: Activity #5: Slots



Activity #5: Slots

Reserving Slots for a Scheduled Offering:

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1.
3. Select **Search**.
4. Select the **scheduled offering ID** link to access the record in edit mode.
5. Select the **Registration** tab from the Related area.
6. Select **Add to Registration** menu (green plus sign next to **Add Users**).
7. Select **Add Slots** from the drop-down menu.
8. Select an organization for which to reserve the slots.
9. Enter the number of slots to be reserved for the organization.
10. Enter the reservations date (defaults to current date).
11. Enter the reservation time (defaults to current time).
12. Select **Save**.

Scheduling Management VA Talent Management System

Registration Assistant

The Registration Assistant is a tool that helps streamline the process of registering users from the admin side of the VA TMS.



59

Notes:

Slide 61: Registration Assistant

Scheduling Management VA Talent Management System



Demonstration: Registration Assistant

60

Notes:

Slide 62: Demonstration: Registration Assistant



Demonstration: Registration Assistant

1. Navigate to **Learning > Tools > Registration Assistant** to access the tool.
2. Select **Register Users**.
3. Select **Next**.
4. Select the magnifying glass for Scheduled Offering.
5. Enter search criteria for the scheduled offering.
6. Select **Search**.
7. Select the scheduled offering.
8. Select **Next**.
9. Select **add one or more from list**.
10. Enter search criteria for the user(s) you want to register.
11. Select **Search**.
12. Select the **Add** checkbox for the user(s) you want to register.
13. Select **Add**.
14. Select **Next**.
15. Add comments, if required.
16. Select **Next**.
17. Select **Next**. (Admins don't add any financial data at this time.)
18. Select **Finish**.



The Job Aid: Registration Assistant Tool is available in the VA TMS.

Scheduling Management VA Talent Management System

Knowledge Check

All of the user registration options on a scheduled offering are determined within the Registration tab.

- a) True
- b) False



61

Notes:

Slide 63: Knowledge Check

Scheduling Management VA Talent Management System

Knowledge Check

What are the four registration statuses in the VA TMS?



63

Notes:

Slide 64: Knowledge Check

Scheduling Management VA Talent Management System

Knowledge Check

Slots allow you to reserve seats in a scheduled offering without having to register specific users.

- a) True
- b) False



63

Notes:

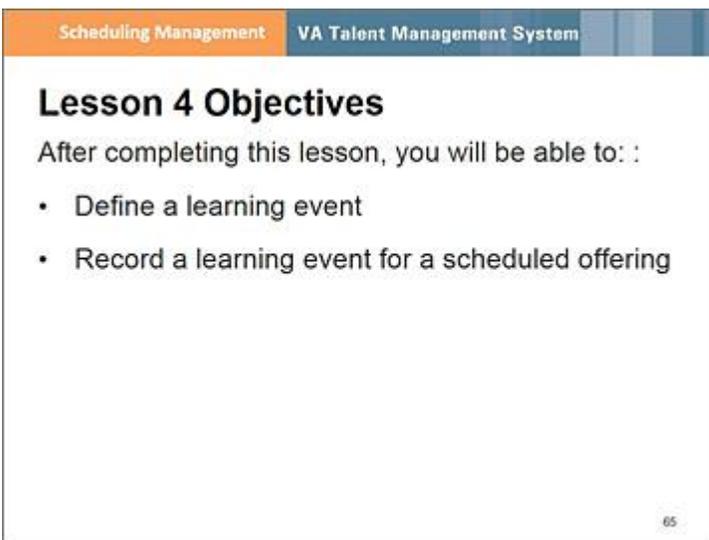
Slide 65: Knowledge Check

2.5 Lesson 4: Record Learning Events



Notes:

Slide 66: Lesson 4: Record Learning Events



Notes:

Slide 67: Lesson 4 Objectives

Scheduling Management VA Talent Management System

Learning Events

A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of attendance or completion of any external event considered important enough to document (but not related directly to learning needs)

66

Notes:

Slide 68: Learning Events

Scheduling Management VA Talent Management System

Record Scheduled Offering Before End Date

- Admins may record learning for a scheduled offering before the offering end date.
- They may **not** record learning before the offering start date.
- They will navigate to:

Users > Tools > Record Learning-Multiple

67

Notes:

Slide 69: Record Scheduled Offering Before End Date



Scheduling Management VA Talent Management System

Types of Learning Events

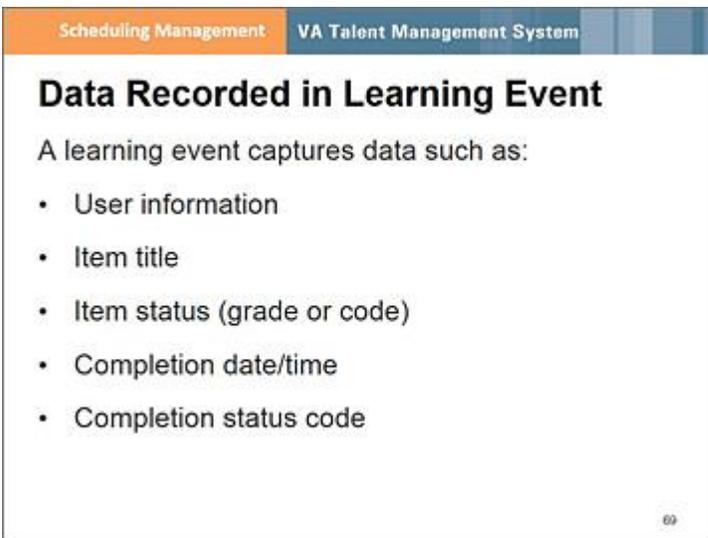
Learning events can be:

- Item-based events
- External events

68

Notes:

Slide 70: Types of Learning Events



Scheduling Management VA Talent Management System

Data Recorded in Learning Event

A learning event captures data such as:

- User information
- Item title
- Item status (grade or code)
- Completion date/time
- Completion status code

69

Notes:

Slide 71: Data Recorded in Learning Event



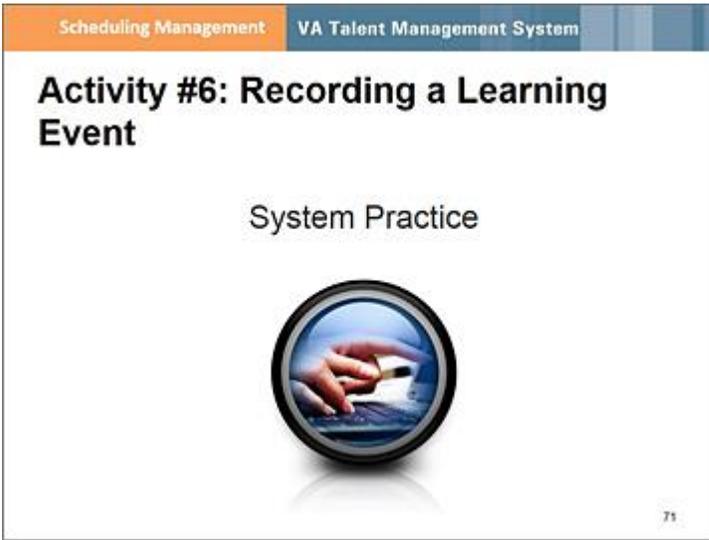
Notes:

Slide 72: Demonstration: Recording a Learning Event



Demonstration: Recording a Learning Event

1. From the Quick Links section of the Admin home page, select **Record Learning – Multiple**.
2. You can also access the **Record Learning – Multiple** tool by navigating to Users > Tools > Record Learning – Multiple.
3. The **Record Learning – Multiple** tool can record learning events for multiple items for multiple users as long as the events that you want to record are the same type (for example, all items or all scheduled offerings).



Notes:

Slide 73: Activity #6: Record a Learning Event



Activity #6: Record Learning

1. Navigate to **Users > Tools > Record Learning – Multiple**.
2. Select the **Scheduled Offering** radio button.
3. Select the **Scheduled Offering ID select** icon to search for and select a scheduled offering.
4. Select **Add**. The scheduled offering displays.
5. Search and add users by selecting the **User ID** icon and select **Add** or select **Auto Fill from Registration** to populate the user list from registered users. The list of users appears.
6. Select **Next**.
7. Select **expand** next to the scheduled offering to view all user records.
8. Enter **Completion Status**, and **Hours** next to the scheduled offering title.
9. Select **Apply Changes** to apply to all user records.
10. Make changes as necessary to individual user records.
11. Select **Next**.
12. Review the summary of the learning history to be recorded by the system.
13. Select **Submit**.

Scheduling Management VA Talent Management System

Record Learning Events from Scheduled Offering Page

- Admins can now record a learning event from the scheduled offering page.
- The wizard populates the scheduled offering details and the enrolled users.
- To use this feature, administrators must have the required role to record learning events.

74

Notes:

Slide 74: Record Learning Events from Scheduled Offering Page

Scheduling Management VA Talent Management System



Demonstration: Recording a Learning Event from Scheduled Offering Page

75

Notes:

Slide 75: Demonstration: Recording a Learning Event from Scheduled Offering Page



Demonstration: Recording a Learning Event from Scheduled Offering Page

From the admin home page:

1. Select **Learning**.
2. Select **Scheduled Offering**.
3. Enter search criteria for the scheduled offering.
4. Select **Search**.
5. Select the scheduled offering from the search results.
6. In the **Actions** area of the Scheduled Offering record, select **Record Learning**.
7. Select **Users** for whom you want to record learning.
8. Select **Next**.
9. Enter **Comments** and **Status** of the learning event for each user. **Note:** VA TMS does not recognize grades so leave this field blank.
10. Select **Next**.
11. Select **Next**. **Note:** The VA TMS does not recognize costs so leave this page blank.
12. Select **Finish**.

Scheduling Management VA Talent Management System

Activity #7: Record a Learning Event from Scheduled Offering Page

System Practice



76

Notes:

Slide 76: Activity #7: Record a Learning Event from
Scheduled Offering Page



Activity #7: Record a Learning Event from Scheduled Offering Page

From the admin home page:

1. Select **Learning**.
2. Select **Scheduled Offering**.
3. Enter search criteria for the scheduled offering.
4. Select **Search**.
5. Select the scheduled offering from the search results.
6. In the **Actions** area of the Scheduled Offering record, select **Record Learning**.
7. Select **Users** for whom you want to record learning.
8. Select **Next**.
9. Enter **Comments** and **Status** of the learning event for each user. **Note:** VA TMS does not recognize grades so leave this field blank.
10. Select **Next**.
11. Select **Next**. **Note:** The VA TMS does not recognize costs so leave this page blank.
12. Select **Finish**.

Scheduling Management VA Talent Management System

Knowledge Check

What data can be recorded in a learning event?

- a) Completion date and status
- b) User information
- c) Item information
- d) All of the above



72

Notes:

Slide 77: Knowledge Check

Scheduling Management VA Talent Management System

Knowledge Check

Admins can record learning events for users who were not registered in the scheduled offering originally.

- a) True
- b) False



73

Notes:

Slide 78: Knowledge Check

Scheduling Management VA Talent Management System

Related Reports

The following are reports in VA TMS that relate to scheduled offerings:

- Scheduled Offering Roster (Print from Scheduled Offering Record)
- Scheduled Offering Data
- Learning Calendar
- Registration Status



74

Notes:

Slide 79: Related Reports

Scheduling Management 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.



75

Notes:

Slide 80: Evaluation & Self Certification Reminder



Notes:

Slide 81: Questions?

3.0 Terminology

Scheduled Offering	An item that has been scheduled and placed on the training calendar with a start date and start time. It is made available to users via catalogs. It can't be in a catalog that the item is not in.
Schedule Block	A schedule block prevents resources from being scheduled into another offering during a given time.
Segment	A unit of time within a scheduled offering. A scheduled offering must have at least one segment, but can have multiple segments. Segments are used primarily for resource management.
Class	A group of users who are tracked as a group and perhaps complete a series of scheduled training requirements.
Group Instance	A method to group scheduled offerings for reports.
Resources	Assets that are assigned and reserved to a segment within a scheduled offering: Instructor, Facility, Location, Equipment, Materials