VA TMS Domain Manager and Learning Manager Administrator Course

Session 7: Assign, Register, and Record Learning

Virtual Instructor-Led Training
Participant Guide

March 2014
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1.0 Training Content

1.1 Session 7 Overview

Slide 1: Session 7: Assign, Register, and Record Learning

Notes:

Session Objectives

- Demonstrate the assignment and enrollment process and user registration functions
- Demonstrate the use of slots to reserve space in a scheduled offering
- Demonstrate how to assign items and curricula to users
- Demonstrate how to record an item-based and external event
- Demonstrate how to access record learning tools and record attendance

Slide 2: Session Objectives

Notes:

Commented [MM1]: Update slide if objective is edited (see IG for comment)
1.2 **Lesson 1: Overview of Assignment Methods**

After completing this lesson, you will be able to:

- Explain the assignment and enrollment process
- Demonstrate how to create an Assignment Profile
- Propagate automated learning assignments to users

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**Notes:**

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**Slide 3: Lesson 1: Overview of Assignment Methods**

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**Slide 4: Lesson 1 Objectives**
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Assignment Profiles Overview
Assignment Profiles are the most powerful tool in the VA TMS. They allow you to assign:
- Curricula
- Catalogs
- Competencies

Assigning Learning
Users can be assigned to curriculum in two ways:
1. Manual
   - By selecting the user and assigning curriculum
2. Automated
   - Using Assignment Profiles
1.3 Lesson 2: Manual Assignment Methods

Slide 7: Lesson 2: Manual Assignment Methods

Lesson 2 Objectives

After completing this lesson, you will be able to:
• Assign items through a user record
• Assign learning through the User Needs Management Tool

Slide 8: Lesson 2 Objectives
Manually Assigning Learning

From Learning Plan tab:

From User Needs Management Tool:

Demonstration: Assigning an Item

Notes:

Slide 9: Manually Assigning Learning

Slide 10: Demonstration: Assigning an Item
Demonstration: Assigning an Item

To assigning items directly to user record:

1. Navigate to Users > Users.
2. Enter criteria to search for the user to whom you will assign the item.
3. Select Search.
4. Select the user ID link.
5. Select the To-Do List tab in the Related area.
6. Select Add New To-Do List.
7. Enter criteria to search for the item to assign.
8. Select Search.
9. Select the Add checkbox next to the item(s) to add.
10. Select Add.
11. Locate the item in the displayed list.
12. Add/edit the Required Date using the Calendar icon.
13. Select an assignment type from the drop-down menu.
14. Select Save.

The Job Aid: Assign Learning via Basic Methods is available in the VA TMS.
Activity #1: Assigning Items Directly to User Record

System Practice

Slide 11: System Login

Notes:

Slide 12: Activity #1: Assigning Items Directly to User Record

Notes:
Activity #1: Assigning Items Directly to User Record

1. Navigate to Users > Users.
2. Enter criteria to search for the user to whom you will assign the item.
3. Select Search.
4. Select the user ID link.
5. Select the To-Do List tab in the Related area.
6. Select Add New To-Do List.
7. Enter criteria to search for the item to assign.
8. Select Search.
9. Select the Add checkbox next to the item(s) to add.
10. Select Add.
11. Locate the item in the displayed list.
12. Add/edit the Required Date using the Calendar icon.
13. Select an assignment type from the drop-down menu.
14. Select Save.
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Slide 13: Batch Learning Assignments

For one-time manual batch assignment of one or more items or curricula to a group of users, use the User Needs Management tool.

Slide 14: Demonstration: User Needs Management

Demonstration: User Needs Management
**Demonstration: User Needs Management**

Assigning curriculum using the User Needs Management tool:

1. Navigate to **Users > Tools > User Needs Mgmt.**
   
   **NOTE:** You can also access the tool from the **Quick Links** section of the Home page, or by selecting the **Assign Learning Needs** link from the **Actions** area of the user record.

2. Select the **Add Curricula** radio button and select **Next**.
3. Select the **add one or more from list** link.
4. Enter criteria to search for the users to have the curriculum added.
5. Select **Search**.
6. Select the **Add** checkboxes next to each user who needs the curriculum.
7. Select **Add** and select **Next**.
8. Select the **add one or more from list** link.
9. Enter criteria to search for the curriculum to add.
10. Select **Search**.
11. Select the **Add** checkbox next to the curricula to add.
12. Select **Add**.
13. Select **Next**. Note the assign date.
14. Select **Next**.
15. Select **Run Job Now**.

The Job Aid: Assign Learning via Basic Methods is available in the VA TMS.
Activity #2: Assigning Curriculum Using the User Needs Management Tool

System Practice
Activity #2: Assigning Curriculum Using the User Needs Management Tool

   NOTE: You can also access the tool from the Quick Links section of the Home page, or by selecting the Assign Learning Needs link from the Actions area of the user record.

2. Select the Add Curricula radio button and select Next.

3. Select the add one or more from list link.

4. Enter criteria to search for the users to have the curriculum added.

5. Select Search.

6. Select the Add checkboxes next to each user who needs the curriculum.

7. Select Add and select Next.

8. Select the add one or more from list link.

9. Enter criteria to search for the curriculum to add.

10. Select Search.

11. Select the Add checkbox next to the curricula to add.

12. Select Add.

13. Select Next. Note the assign date.

14. Select Next.

15. Select Run Job Now.
Knowledge Check

Recording a learning event creates a ____ record for users.

a) Registration request
b) Curriculum items
c) Class ID
d) Learning History
1.4 Lesson 3: Automatic Assignment Methods

Lesson 3 Objectives
After completing this lesson, you will be able to:
• Assign training through a job code
• Describe the elements of Assignment Profiles

Notes:
Attributes
Assignment Profiles are used to define, by attributes, groups of users for the purpose of making assignments. Attributes include:
- Job position
- Organization
- Employee type
- Supervisory level
- Hire date

Methods of Assigning Learning

<table>
<thead>
<tr>
<th>Free-Floating Items</th>
<th>Curricula</th>
<th>Batch Assign?</th>
<th>Automatic Assignment?</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Record</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>User Needs Management</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Job Codes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Assignment Profiles</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Curricula and Job Codes

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

When adding a curriculum to a job code, if you want all users who currently have that job position to receive the curriculum assignment, check the Add curricula to users who are assigned the job code checkbox.

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Notes:

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

To associate a curriculum to a job code:

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

NOTE: If this action affects too many records, the system may require you to schedule the job to run during established off-peak hours.

The Job Aid: Manage Curriculum is available in the VA TMS.
Activity #3: Associate Curriculum to a Job Code

System Practice

Slide 25: Activity #3: Associate Curriculum to a Job Code
Activity #3: Associate Curriculum to a Job Code

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

The Job Aid: Manage Curriculum is available in the VA TMS.
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Session 7: The Assignment Profile uses the common attributes of a group of users to assign curricula and items.

Key terms for assignment profiles:
- Groups
- Attributes
- Operator
- Value

Groups, Rules, and Attributes

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

Creating a Rule

Operators + Attributes + Values = Rule

Rule + Rule = Group

Slide 28: Creating a Rule

Profile Attributes

Example of assigning users to an Assignment Profile (AP) with the following attributes:
- Job Code: Sales
- Hire Date: On or before 1/1/12

Results:

AND
- Group 1: employees that are in sales and were hired on or before 1/1/12

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

Slide 29: Profile Attributes
1. Use Advanced Search first to determine the correct number of users for the profile.
2. Create rules by adding attributes and values from the bottom of the screen up.
   - Rules in the same group create an AND relationship.
   - Adding a new group creates an OR relationship.
3. Add domains last.
4. Use Preview Users in Assignment Profile to check that number of users matches first search.

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Notes:

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

Slide 32: Demonstration: Assignment Profile
Demonstration: Assignment Profile

To add a new Assignment Profile:

1. Navigate to Users > Assignment Profile.
2. Select Add New.
   
   **NOTE:** You can also enter Add Assignment Profile into the Search field below the Button bar and select Go.
3. Enter an Assignment Profile ID.
4. Enter a description.
5. Select a domain.
6. Enter an e-mail address for the person responsible for the Assignment Profile.
7. Enter the Created For Information. This identifies the person who requested the Assignment Profile to be created.
8. Enter any applicable notes.
9. Select Add.
10. In the Recommended Next box, select Define User Pool.
11. Select OK on the Create Assignment Rules pop-up message.
12. In the Set up Rules section, select Job Location ID from the Select Attribute drop-down menu.
13. Select Matches from the Select Operator drop-down menu.
14. In the values box (currently blank), enter DC, MD. You can also use the magnifying glass icon to search for the desired values.
15. Select Save.
16. In the Set up Domain section, select Add Domain(s).
17. Enter criteria to search for the desired domains. For this activity, enter the keyword AIR.
18. Select Search.
19. Check the Top Level Only checkbox.
20. Select Add.

21. Select in the rule title textbox and enter a rule description.

22. Select Save.

   **NOTE:** You must enter the rule name, attribute, operator, and value.

23. Select **Preview Users in Assignment Profile** to see which users currently match the criteria.

24. Close the preview window.

25. Select Save.

26. Select Cancel to return to the main Assignment Profile screen.

27. In the **Recommended Next** box, select **Add Curricula**.

28. Select **Add New Curricula**.

29. Enter criteria to search for curricula.

30. Select **Search**.

31. Check the **Add** checkbox for the curricula to associate with the Assignment Profile.

32. Select **Add**.

33. Repeat steps 28–32 for each curriculum to add to the profile.

34. In the Actions area, select **Propagate**. The system may require you to schedule this as a background job. Once this job runs, all users with the attributes you specified will be assigned the selected curricula. Once the Assignment Profile has been successfully propagated, the **Existing Users in Assignment Profile** link in the Actions areas can be used to display the users that are currently being affected by the Assignment Profile.

The Job Aid: Assign Learning via Assignment Profile is available in the VA TMS.
Activity #4: Assignment Profile

System Practice

Slide 33: Activity #4: Assignment Profile
Activity #4: Assignment Profile

To add a new Assignment Profile:

1. Navigate to Users > Assignment Profile.
2. Select Add New.
   
   **NOTE:** You can also enter Add Assignment Profile into the Search field below the Button bar and select Go.
3. Enter an Assignment Profile ID.
4. Enter a description.
5. Select a domain.
6. Enter an e-mail address for the person responsible for the Assignment Profile.
7. Enter the Created For Information. This identifies the person who requested the Assignment Profile to be created.
8. Enter any applicable notes.
9. Select Add.
10. In the Recommended Next box, select Define User Pool.
11. Select OK on the Create Assignment Rules pop-up message.
12. In the Set up Rules section, select Job Location ID from the Select Attribute drop-down menu.
13. Select Matches from the Select Operator drop-down menu.
14. In the values box (currently blank), enter DC, MD. You can also use the magnifying glass icon to search for the desired values.
15. Select Save.
16. In the Set up Domain section, select Add Domain(s).
17. Enter criteria to search for the desired domains. For this activity, enter the keyword AIR.
18. Select Search.
19. Check the Top Level Only checkbox.
20. Select Add.
21. Select in the rule title textbox and enter a rule description.

22. Select Save.

   NOTE: You must enter the rule name, attribute, operator, and value.

23. Select Preview Users in Assignment Profile to see which users currently match the criteria.

24. Close the preview window.

25. Select Save.

26. Select Cancel to return to the main Assignment Profile screen.

27. In the Recommended Next box, select Add Curricula.

28. Select Add New Curricula.

29. Enter criteria to search for curricula.

30. Select Search.

31. Check the Add checkbox for the curricula to associate with the Assignment Profile.

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33. Repeat steps 28–32 for each curriculum to add to the profile.

34. In the Actions area, select Propagate. The system may require you to schedule this as a background job. Once this job runs, all users with the attributes you specified will be assigned the selected curricula. Once the Assignment Profile has been successfully propagated, the Existing Users in Assignment Profile link in the Actions areas can be used to display the users that are currently being affected by the Assignment Profile.

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

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

Automatic Process Manager (APM)

Any time an Assignment Profile is created or changed, it must be propagated through a background job before it can be synchronized through the automatic process. Assignment Profiles that are not propagated are skipped during the APM process.
Manual Synchronization

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

Notes:

Slide 36: Manual Synchronization

Assignment Profile Record

Slide 37: Assignment Profile Record
Knowledge Check

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

a) True
b) False
1.5 **Lesson 4: Record Learning**

**Lesson 4 Objectives**

After completing this lesson, you will be able to:
- Record a learning event for a scheduled offering
- Define a learning event

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**Notes:**

*Slide 39: Lesson 4: Record Learning*

*Slide 40: Lesson 4 Objectives*
Session 7: Assign, Register, and Record Learning
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Notes:

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)

Types of Learning Events
Learning events can be:
• Item-based events
• External events

Slide 41: Learning Events

Slide 42: Types of Learning Events
Session 7: Assign, Register, and Record Learning
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Item-Based Events
• Items are the primary events found in list of learning events for users
• Includes items created as scheduled offerings
• All items may have a learning event recorded against them for any user

External Events
• A learning activity outside of the organization, such as a college course
• External events allow a description and comment field to identify the nature of training

Notes:
Record Learning-Multiple Tool
This tool can record learning events for multiple items for multiple users as long as the events you want to record are the same type.

Demonstration:
Record Learning-Multiple Tool

Slide 45: Record Learning-Multiple Tool

Slide 46: Demonstration: Record Learning-Multiple Tool
Demonstration: Record Learning-Multiple Tool

You can access the tool in one of two ways:

- Select Record Learning-Multiple from the Quick Links section on the Home page
- Navigate to Users > Tools > Record Learning-Multiple
Activity #5: Record a Learning Event Item for Completion

System Practice

Notes:

Slide 47: Activity #5: Record a Learning Event Item for Completion
Activity #5: Record a Learning Event Item for Completion

Recording a learning event for item(s) completion:

1. Use one of the two ways to access the Record Learning-Multiple tool.
2. Select the Scheduled Offering radio button.
3. In the Search and Add Items section, enter the Scheduled Offering ID.
4. Select Add.
   
   **NOTE:** You can also use the magnifying glass icon to search for and select the item.
5. Repeat steps 3–4 to add additional scheduled offerings.
6. In the Search and Add Users section, select the Auto Fill From Registration button or enter the user ID.
7. Select Add.
8. Repeat sets 6–7 to add additional users.
9. Select Next.
10. In the Edit Details section, enter details for the item:
    
    - Completion date and time
    - Time zone
    - Grade of completion status
    - Total hours, credit hours, contact hours, and CPE
11. Select the More Options icon to enter instructor information and comments.
12. Select Apply Changes to make the changes apply to all users.
13. Select the Expand icon.
14. If the details are different for each user, change the item details accordingly. Enter the completion date, time, and time zone for each user for the item.
15. If you modified the details for any user, select Apply Changes in the yellow section of the screen.
16. Repeat steps 10–15 for all other items.
17. Select Next.
18. If competencies are to be assessed as a result of recording a learning event for these items, select one of the assessment options.
19. Select **Submit**.

The Job Aid: Record Learning is available in the VA TMS.
Activity #6: Record a Learning Event Item for External Event

System Practice

Slide 48: Activity #6: Record a Learning Event Item for External Event
Activity #6: Record a Learning Event Item for External Event

1. Use one of the two ways to access the Record Learning-Multiple tool.
2. Select the External Event radio button.
3. In the Add External Events section, enter a description.
4. Select Add.
5. In the Search and Add Users section, enter the user ID.
6. Select Add.
7. Select Next.
8. In the Edit Details section, enter details for the item:
   - Completion date and time
   - Time zone
   - Grade (if applicable)
   - Total hours, credit hours, contact hours, and CPE
9. Select the More Options icon to enter instructor information and comments.
10. Select Apply Changes to make the changes apply to all users.
11. Select Next.
12. Select Submit.
After a learning event is recorded, the Learning History tab of the user record displays the learning events that have just been completed.

Admin side (User Record)

Certificate of Completion

- Admins or users can print certificates upon successful completion of an item
- Certificates are generated in .PDF format and will open in Adobe Acrobat Reader
- Certificates are not generated for external events
Learning Events Editor

- Learning events may be edited and files may be attached to records with Learning Event Editor tool
- Permissions required to edit or delete learning event records
- Admins can attach files to learning events, such as certificates, transcripts, or written tests, scanned to computer of admin making changes

Slide 51: Learning Events Editor

Demonstration: Learning Events Editor

Slide 52: Demonstration: Learning Events Editor
Demonstration: Learning Events Editor

An attachment framework is used to allow you to attach external documents to records in the VA TMS. For example, if a user completed a course that required a paper-based test at the end, the paper-based test could be digitized (scanned into a PDF or MSWord document using other means) and attached to the learning history record using the Learning Event Editor tool for future reference.

The attachment interface shows all attachments related to the entity. In addition, it allows for additions and removals of attachments. When you select the File Attachments link on the Summary tab of the record, you can browse for a file to attach to the record. It is recommended that you enter a description to identify each file more easily (you cannot modify a description after you upload the file). Select Upload to finish the attachment process.

File Attachment Interface:

If you attempt to attach a file that is of an unsupported type, a validation error displays. If you attempt to attach a file that is larger in size than allowable, another similar validation error also displays.

File Attachment Validation Error:

Users can access attached files in the user interface by reviewing the completed work details of the recorded item, and administrators can access the attached files in SuccessFactors Administration on the Learning History tab from the Related area of a user record.
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Knowledge Check
You can record learning for all of the following except:
   a) Items
   b) Scheduled Offerings
   c) External Events
   d) Schedule Block

Session 7 Summary
- Demonstrate the assignment and enrollment process and user registration functions
- Demonstrate the use of slots to reserve space in a scheduled offering
- Demonstrate how to assign items and curricula to users
- Demonstrate how to record an item-based and external event
- Demonstrate how to access record learning tools and record attendance
Session 8 Preview

• Title: Running Reports
• Lessons:
  1. Reports: Interface, Searches, and Categories
  2. Demonstrate How to Run, Schedule, and Save Reports
  3. Organizational Dashboard and Charts

Notes:

Slide 55: Session 8 Preview

Questions?

Slide 56: Questions?