

Job Aid: Assign Learning via Basic Methods

Purpose

The purpose of the Assign Learning via Basic Methods job aid is to guide you through the step-by-step process of assigning items and curricula to users.

In this Job Aid, you will learn how to:

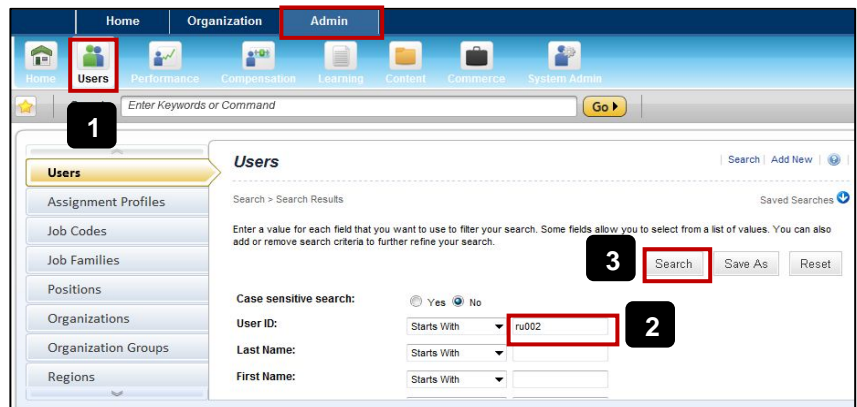
- Assign Items Directly to Users Via Their User Record
- Assign Curriculum Directly to Users Via Their User Record
- Assign Items to Users Via User Needs Management Tool
- Assign Curricula to Users Via User Needs Management Tool



Task A. Assign Items Directly to Users Via Their User Record

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Users**.
2. Enter search criteria to find the user record.
3. Click the **Search** button.

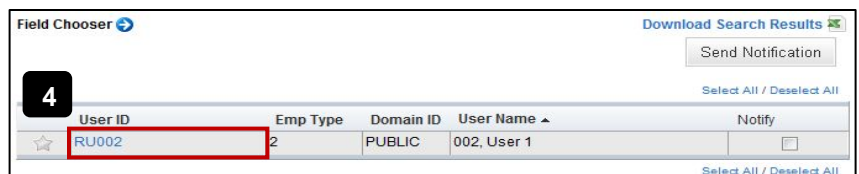


1

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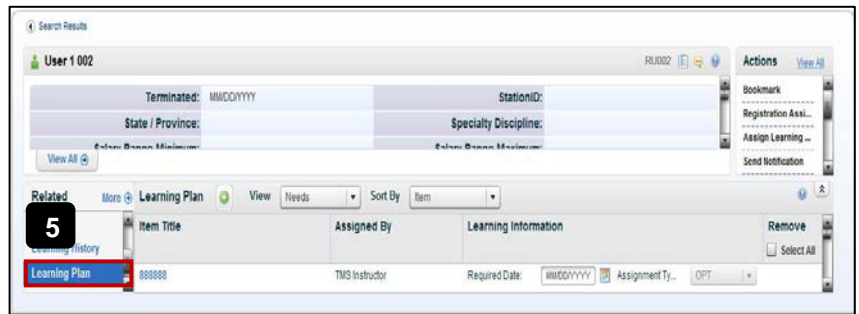
4. In the search results list, click the **User ID** to select the user record.



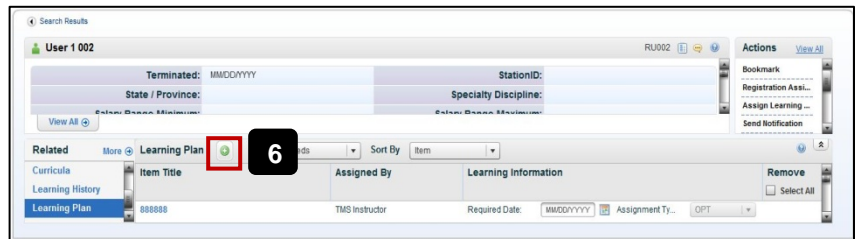
4

| User ID | Emp Type | Domain ID | User Name |
|---------|----------|-----------|-------------|
| RU002 | 2 | PUBLIC | 002, User 1 |

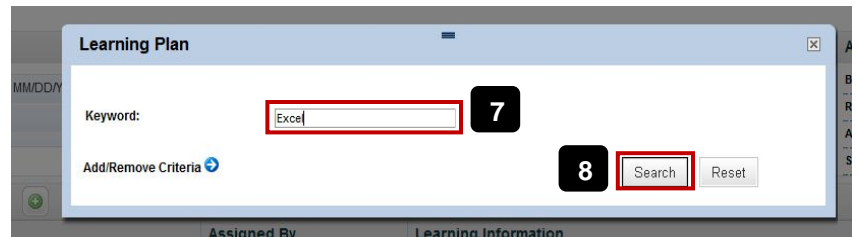
5. Select the **Learning Plan** tab under Related.



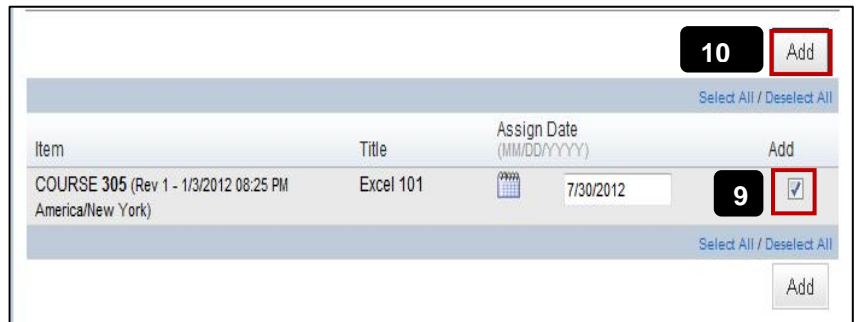
6. Click the add new item icon (green plus sign) to the right of Learning Plan to add an item.



7. Enter a keyword value to find the item and
8. click the **Search** button.



9. Check the box to the right of the item(s) to be added.
The **Assign Date** field pre-fills with the current date by default. You may enter another date; future dates are not accepted.
10. Click the **Add** button to complete the selection and close the window.



11. On the **Learning Plan** tab, view the user's learning plan to verify the item was added.

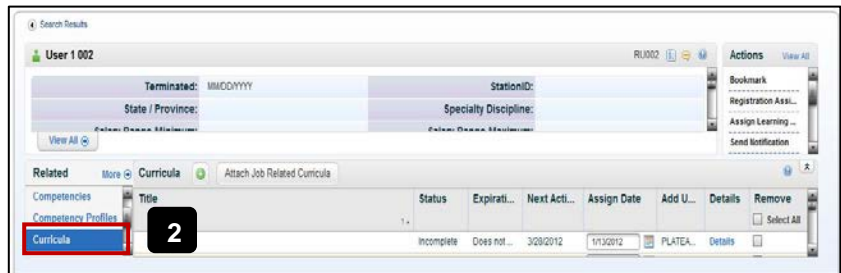




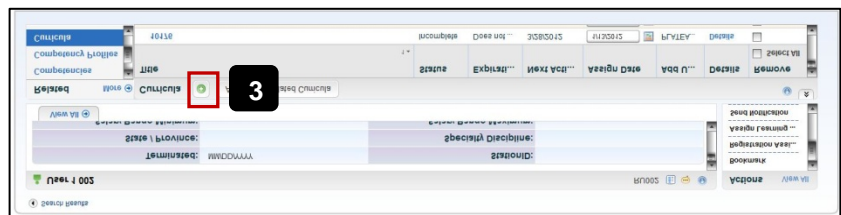
Task B. Assign Curriculum Directly to User Record

Note: Verify that the **Admin** tab is selected.

1. Complete Steps 1-4 in **Task A** above.
2. Select the **Curricula** tab under Related.



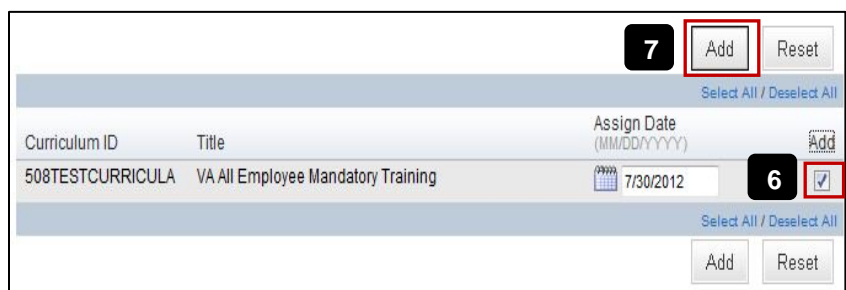
3. Click the **add new curricula** icon (green plus sign) to the right of Curricula.



4. Enter a keyword value to find the curricula.
5. Click the **Search** button.



6. Check the box to the right of the curricula to be added. The **Assign Date** field pre-fills with the current date by default. You may enter another date; future dates are not accepted.
7. Click the **Add** button to complete the selection and close the window.



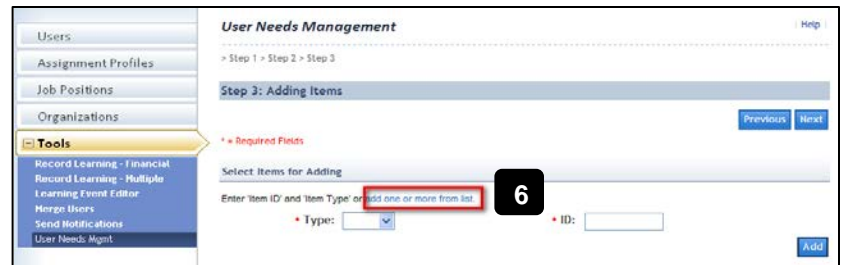
8. On the **Curricula** tab, view the assignments to verify the curriculum was added.



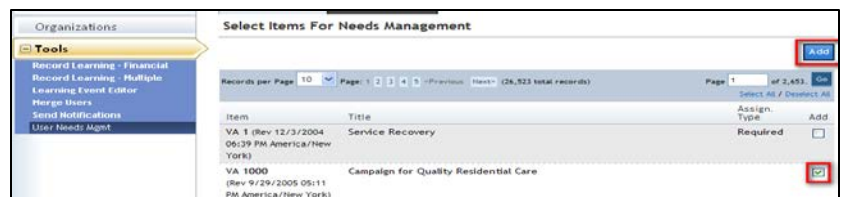
6. To add items, select the item type from the **Type** drop-down menu, enter the exact item ID in the **ID** field and click the **Add** button

OR

Click the **add one or more from list** link to search for and select items.

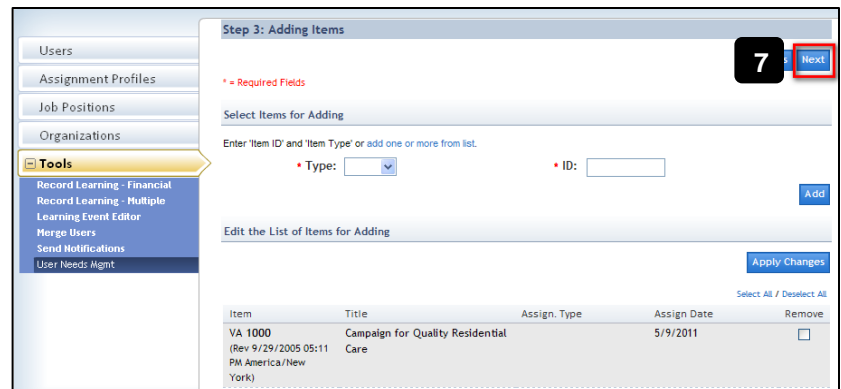



For this example, select any of the courses listed. One or more items can be added using the **Add** checkbox. Click the **Add** button to complete the selection and close the search window.



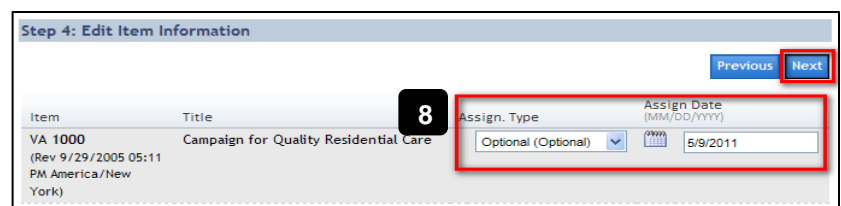
| Item | Title | Assign. Type | Add |
|---|---------------------------------------|--------------|-------------------------------------|
| VA 1 (Rev 12/3/2004 06:39 PM America/New York) | Service Recovery | Required | <input type="checkbox"/> |
| VA 1000 (Rev 9/29/2005 05:11 PM America/New York) | Campaign for Quality Residential Care | Required | <input checked="" type="checkbox"/> |

7. Click the **Next** button. *Step 4: Edit Item Information* of the User Needs Management wizard displays.



8. Select the **assignment type** from the **Assign. Type** drop-down menu.

The **Assign Date** field pre-fills with the current date by default. You may enter another date; future dates are not accepted.



| Item | Title | Assign. Type | Assign Date (MM/DD/YYYY) |
|---|---------------------------------------|---------------------|--------------------------|
| VA 1000 (Rev 9/29/2005 05:11 PM America/New York) | Campaign for Quality Residential Care | Optional (Optional) | 5/9/2011 |

9. Click **Next**. *Step 5: Complete User Needs Management* of the User Needs Management wizard displays.

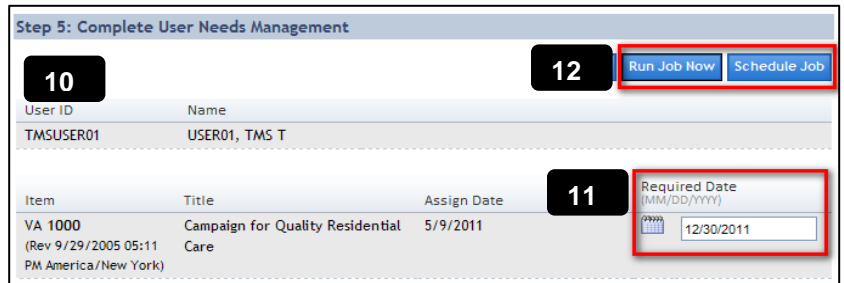


10. Review the **User IDs** and verify the **Item(s)** to be assigned.

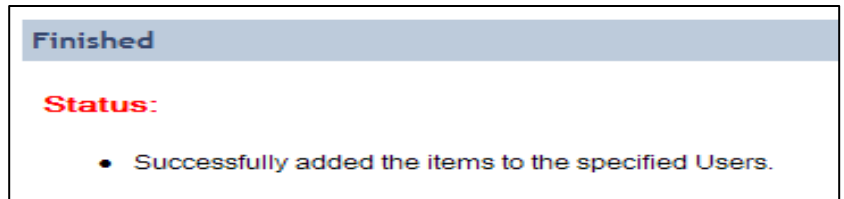
11. Adjust the **Required Date** if necessary.

Note: The required date is calculated based on the item settings.

12. Click **Run Job Now** or **Schedule Job** to complete the User Needs Management wizard.



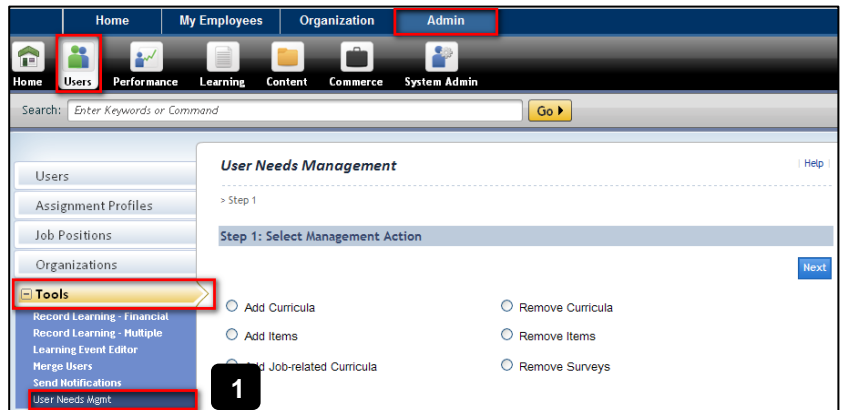
Note: If you click **Run Job Now**, a confirmation page displays with the Status.



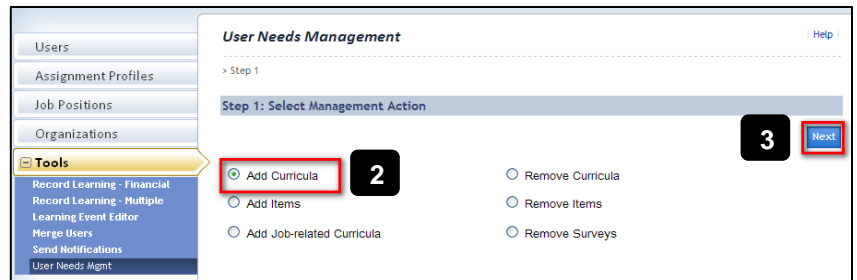
Task D. Assign Curricula to Users Via User Needs Management Tool

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Tools > User Needs Mgmt**. *Step 1: Select Management Action* of User Needs Management wizard displays.



- Select the action you wish to take. For this example, click the **Add Curricula** radio button to add a curriculum to a group of users.
- Click **Next**. *Step 2: Select Users* of User Needs Management wizard displays.



- To add a user, enter the exact user ID in the **User ID** field and click the **Add** button
OR
click the **add one or more from list** link to search for and select users.



- Click **Next**. *Step 3: Select Curricula for Adding* of the User Needs Management wizard displays.



- To add a curriculum, enter the exact **Curriculum ID** and click the **Add** button
OR
Click the **add one or more from list** link to search for curriculum.

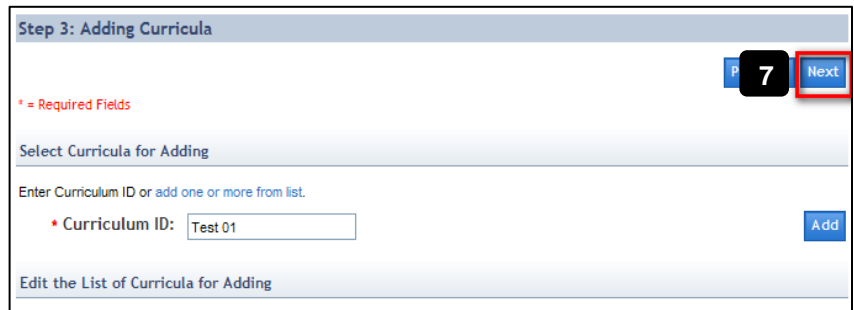



For this example, select any of the curricula listed. Click the **Add** checkbox to select one or more curricula. Click the **Add** button to complete the selection and close the search window



| Curriculum ID | Curriculum Title | Add |
|-------------------|--------------------------------------|-------------------------------------|
| 10176 | 10176 | <input type="checkbox"/> |
| 508TESTCURRICULA | VA All Employee Mandatory Training | <input checked="" type="checkbox"/> |
| 508TEST_CURRICULA | 508TEST_CURRICULA_TITLE | <input type="checkbox"/> |
| AK-CURR-REQUIRED | AK Curricula with Required Item Pool | <input type="checkbox"/> |

- Click **Next**. *Step 4: Edit Assign Dates* of the User Needs Management wizard displays.



Step 3: Adding Curricula

7 Next

* = Required Fields

Select Curricula for Adding

Enter Curriculum ID or add one or more from list.

* Curriculum ID: Add

Edit the List of Curricula for Adding

- The **Assign Date** field pre-fills with the current date by default. You may enter another date; future dates are not accepted. Click **Next**. *Step 5: Complete User Needs Management* of the User Needs Management wizard displays.

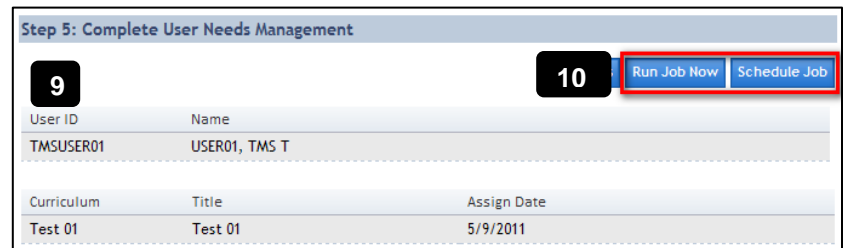


Step 4: Edit Assign Dates

8 Next

| Curriculum ID | Title | Assign Date (MM/DD/YYYY) |
|---------------|---------|--------------------------|
| Test 01 | Test 01 | 5/9/2011 |

- Review the **User IDs** in the lists of affected users and verify the **Curricula** to be assigned. .
- Click **Run Job Now** or **Scheduled Job** to complete the User Needs Management wizard.



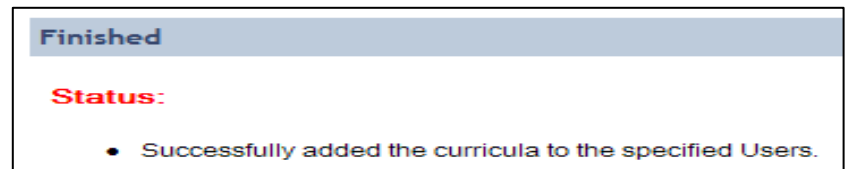
Step 5: Complete User Needs Management

9 10 Run Job Now Schedule Job

| User ID | Name |
|-----------|---------------|
| TMSUSER01 | USER01, TMS T |

| Curriculum | Title | Assign Date |
|------------|---------|-------------|
| Test 01 | Test 01 | 5/9/2011 |

Note: If you click **Run Job Now**, a confirmation page displays with the Status.



Finished

Status:

- Successfully added the curricula to the specified Users.