

## 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:

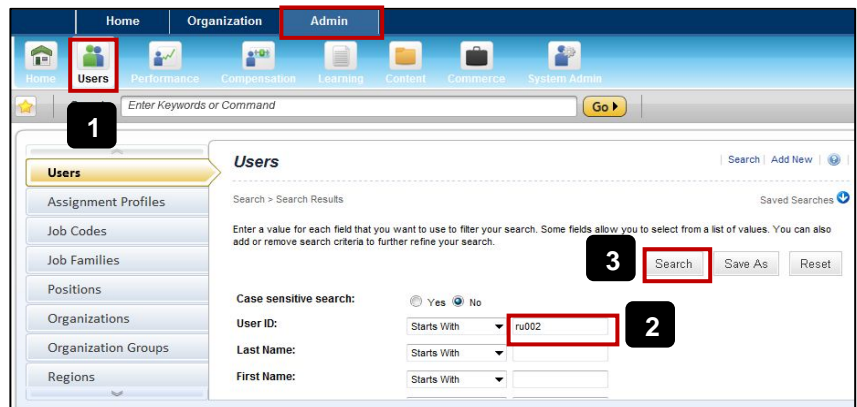
- Assign Items Directly to Users Via Their User Record
- Assign Curriculum Directly to Users Via Their User Record
- Assign Items to Users Via User Needs Management Tool
- Assign Curricula to Users Via User Needs Management Tool



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

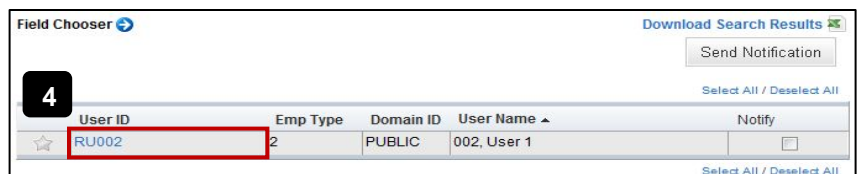
**Note:** Verify that the **Admin** tab is selected.

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



The screenshot shows the TMS Admin interface. The 'Admin' tab is selected in the top navigation bar. The 'Users' menu is expanded, and the 'Users' sub-menu is selected. The search criteria 'ru002' is entered in the 'User ID' field. The 'Search' button is highlighted.

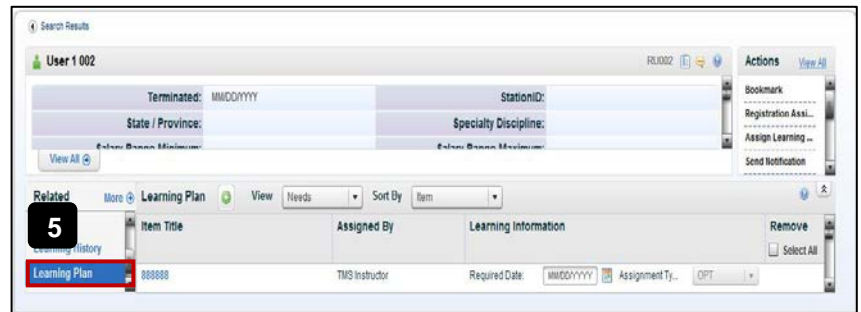
4. In the search results list, click the **User ID** to select the user record.



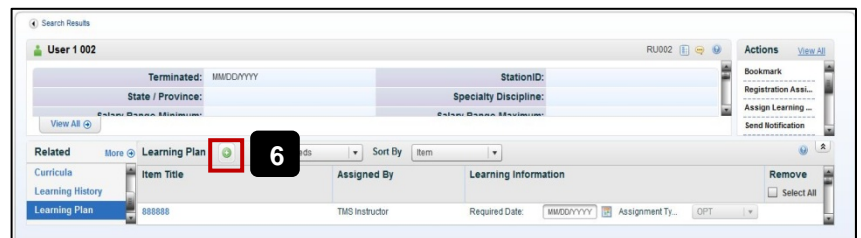
The screenshot shows the search results list. The 'User ID' 'RU002' is highlighted in the table. The table has columns for 'User ID', 'Emp Type', 'Domain ID', 'User Name', and 'Notify'.

User ID	Emp Type	Domain ID	User Name	Notify
RU002	2	PUBLIC	002, User 1	<input type="checkbox"/>

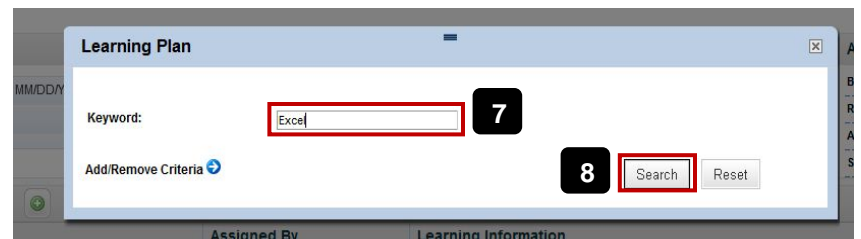
5. Select the **Learning Plan** tab under Related.



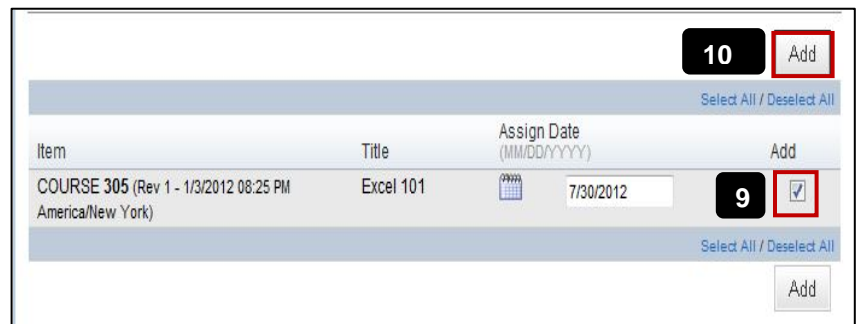
6. Click the add new item icon (green plus sign) to the right of Learning Plan to add an item.



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.

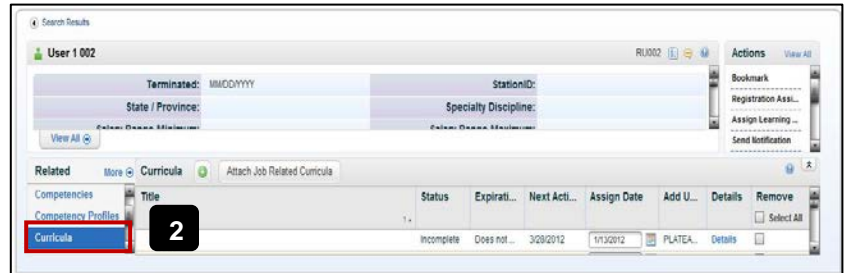




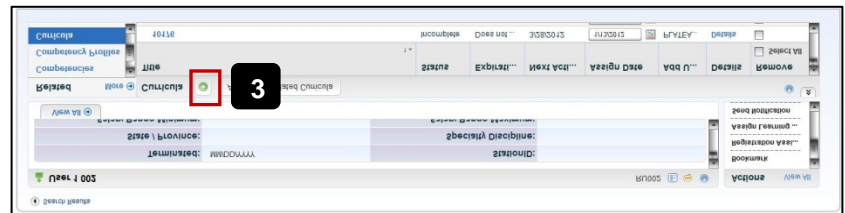
## Task B. Assign Curriculum Directly to User Record

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

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



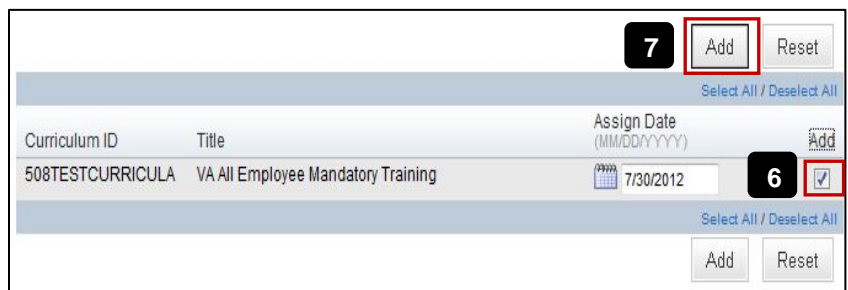
3. Click the **add new curricula** icon (green plus sign) to the right of Curricula.



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.

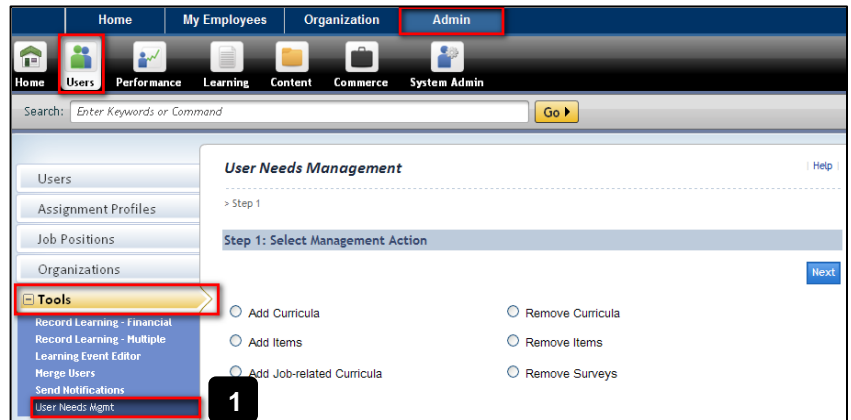




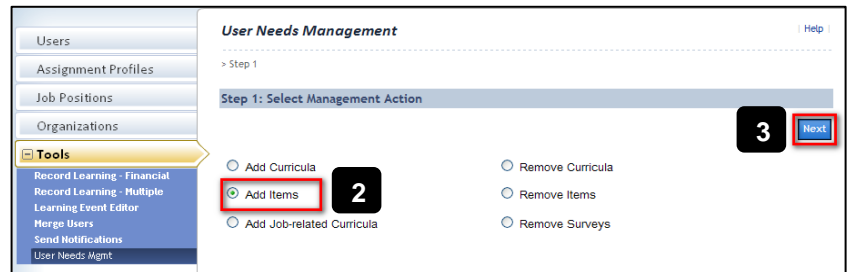
## Task C. Assign Items to Users via User Needs Management Tool

**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.



2. Select the action you wish to take. For this example, click the **Add items** radio button to add a course to users' learning plans.
3. Click the **Next** button. *Step 2: Select Users* of the User Needs Management wizard displays.



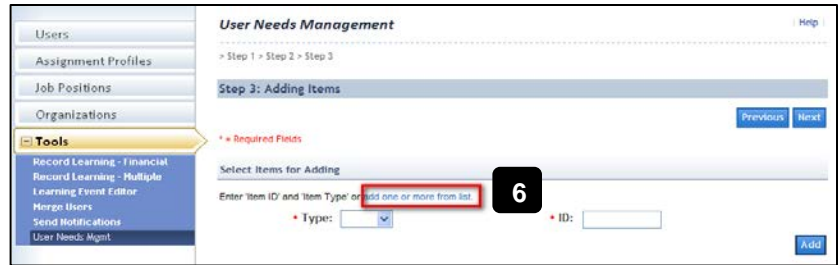
4. To add a user, enter the exact user ID in the **User ID** field and click the **Add** button  
OR  
Click the **add one or more from list** link to search for and select users.
5. Click the **Next** button. *Step 3: Adding Items* of the User Needs Management wizard displays.



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.

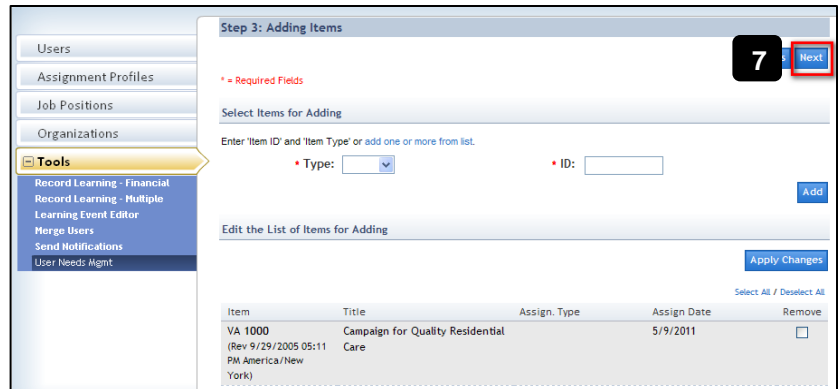



For this example, select any of the courses listed. One or more items can be added using the **Add** checkbox. Click the **Add** button to complete the selection and close the search window.



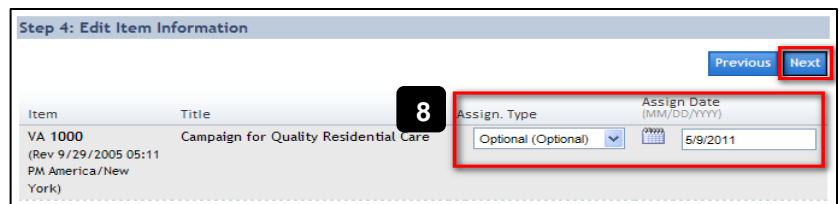
Item	Title	Assign. Type	Add
VA 1 (Rev 12/3/2004 06:39 PM America/New York)	Service Recovery	Required	<input type="checkbox"/>
VA 1000 (Rev 9/29/2005 05:11 PM America/New York)	Campaign for Quality Residential Care	Required	<input checked="" type="checkbox"/>

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.

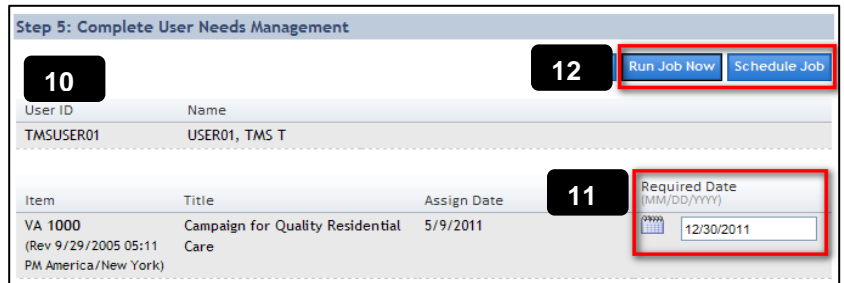


10. Review the **User IDs** and verify the **Item(s)** to be assigned.

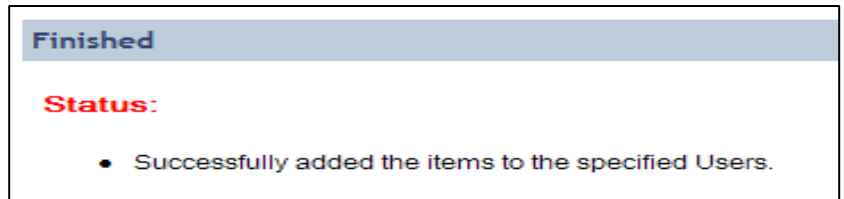
11. Adjust the **Required Date** if necessary.

**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.



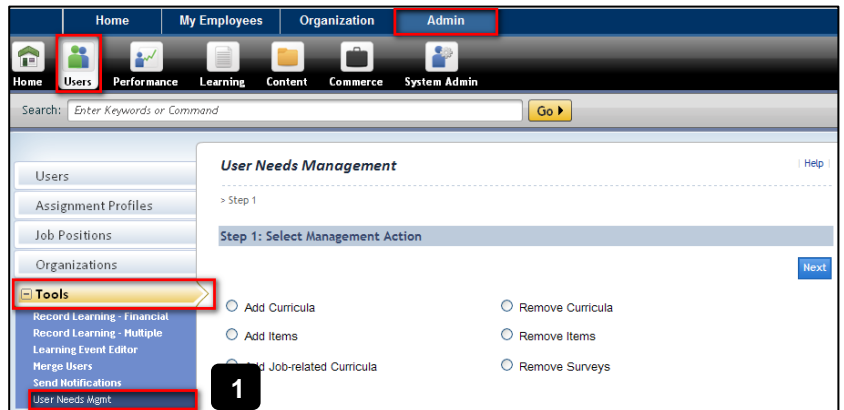
**Note:** If you click **Run Job Now**, a confirmation page displays with the Status.



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

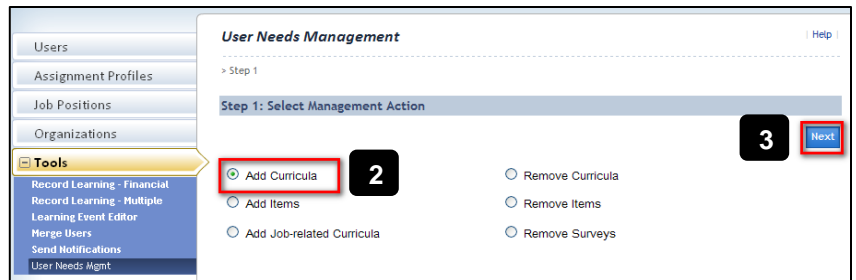
**Note:** Verify that the **Admin** tab is selected.

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.



**User Needs Management**

> Step 1

Step 1: Select Management Action

Add Curricula **2**

Add Items

Add Job-related Curricula

Remove Curricula

Remove Items

Remove Surveys

**3**

- 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.



Step 2: Select Users

\* = Required Fields

Add Users

Enter User ID or add one or more from list.

\* User ID: TMSUSER01 **4**

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



Step 2: Select Users

**5**

\* = Required Fields

Add Users

Enter User ID or add one or more from list.

\* User ID:

Edit Users

- 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.



Select Curricula for Adding

Enter Curriculum ID or add one or more from list.

\* Curriculum ID: Test 01 **6**



Select Curricula for Adding

Enter Curriculum ID or add one or more from list. **6**

\* Curriculum ID:

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

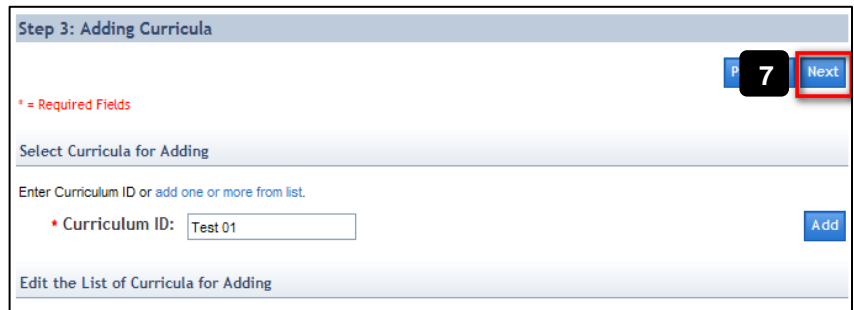


Select Curricula For Needs Management

Records per Page: 10 Page: 1 2 3 4 5 <Previous Next> (41 total records) Page 1 of 5. Go Select All / Deselect All

Curriculum ID	Curriculum Title	<input type="checkbox"/>
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:

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.

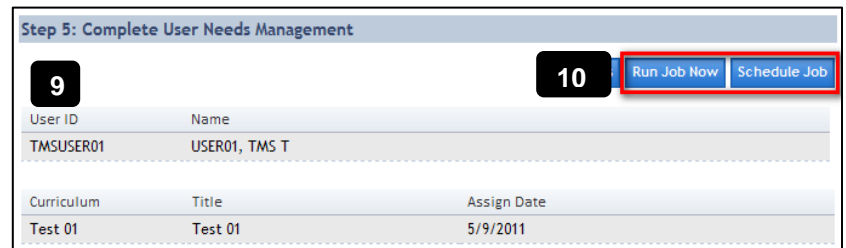


Step 4: Edit Assign Dates

8 Next

Curriculum ID	Title	Assign Date (MM/DD/YYYY)
Test 01	Test 01	<input type="text" value="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.



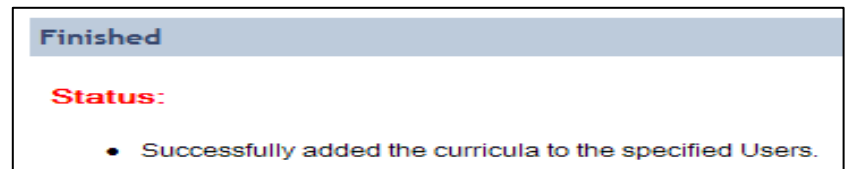
Step 5: Complete User Needs Management

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.