Assignment Profiles
(Advanced Topic)

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

May 2015
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1.0 About This Training

1.1 Training Purpose
The purpose of Assignment Profiles is to provide detailed information about setting up and propagating automated learning assignments to users in the VA TMS.

1.2 Target Audience
This session is an Advanced Topic training session for any VA TMS administrators with some experience in Assignment Profiles that are looking for more in-depth instruction.

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

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
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<tbody>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS.</td>
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<tr>
<td><img src="image2" alt="Icon" /></td>
<td>This icon indicates that participants will complete an activity.</td>
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<tr>
<td><img src="image3" alt="Icon" /></td>
<td>This icon indicates that there is a job aid available for the task.</td>
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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.

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<th>Session</th>
<th>Required for</th>
<th>Recommended for</th>
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| Introduction to VA TMS for All Administrators and Help Desk and Reports Managers | • 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 | • Assignment Managers  
• Scheduling Managers  
• Registration Managers | • 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.

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</tbody>
</table>
2.0 Training Content

2.1 Welcome

Notes:

Slide 1: Session Preparation

VA TMS Role-Based Training: Assignment Profiles (Advanced Topic)

Notes:

Slide 2: VA TMS Role-Based Training: Assignment Profiles (Advanced Topic)

VA TMS Role-Based Training:
Assignment Profiles (Advanced Topic)

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
Session Agenda

- Welcome and Introduction
- Lesson 1: Assigning Curricula to Job Codes
- Lesson 2: Assignment Profiles
- Lesson 3: Automatic Process Manager (APM) and Manual Synchronization
- Questions and Answers

Notes:

Slide 3: Session Agenda

Session Agenda

- Welcome and Introduction
- Lesson 1: Assigning Curricula to Job Codes
- Lesson 2: Assignment Profiles
- Lesson 3: Automatic Process Manager (APM) and Manual Synchronization
- Questions and Answers

Notes:

Slide 4: Session Agenda
Session 5: Introductions

- Name
- Division of VA
- Experience with VA TMS
- Personal training goal
2.2 Lesson 1: Assigning Curricula to Job Codes

Lesson 1:
Assigning Curricula to Job Codes

Slide 6: Lesson 1: Assigning Curricula to Job Codes

Methods of Assigning Learning

<table>
<thead>
<tr>
<th></th>
<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 (To-Do List; no retraining)</td>
<td>Yes (Curricula tab or To-Do List)</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>User Needs Management</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes (1 time)</td>
<td>No</td>
</tr>
<tr>
<td>Job Codes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Assignment Profiles</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Slide 7: Methods of Assigned Learning

Notes:
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 To-Do List
- The relationship between a curriculum and a job code is created in the job code record

Slide 8: Curricula and Job Codes

Curricula and Job Codes

Users > Job Codes > Search > Edit

Slide 9: Curricula and Job Codes
Job Code Notes

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.

Slide 10: Job Code Notes

Demonstration: Automatically Assign Curricula Using a Job Code

Slide 11: 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 impacts 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.
System Login

- Go to https://va-train2.platfor.com/learning/admin/login.do
- Enter your TRAIN Admin Username
- Enter your TRAIN Admin Password

Activity #1: Associate Curriculum to a Job Code

System Practice
Activity #1: 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.
2.3 Lesson 2: Assignment Profiles

Lesson 2:
Assignment Profiles

Slide 14: Lesson 2: Assignment Profiles

Assignment Profile
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

Slide 15: Assignment Profile
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.

Slide 16: Groups, Rules and Attributes

Creating a Rule

Operators + Attributes + Values = Rule

Rule + Rule = Group

Slide 17: Creating a Rule
Profile Attributes
Example of assigning users to an assignment profile with the following attributes:
- Job Code: Sales
- Hire Date: On or before 1/1/12

Results:

**AND**
1 group of employees that are in sales and were hired on or before 1/1/12

**OR**
- Group 1: employees that are in sales
- Group 2: employees hired on or before 1/1/12

Slide 18: Profile Attributes

Knowledge Check
Which user matches the following profile?
**Domain:** HR, IT

<table>
<thead>
<tr>
<th>Group</th>
<th>Attribute</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Job Location</td>
<td>Matches</td>
<td>DC, MD, CA</td>
</tr>
<tr>
<td>1</td>
<td>Hire Date</td>
<td>Between</td>
<td>01/01/2000-12/31/2010</td>
</tr>
</tbody>
</table>

a) Tom Smith, Domain = IT, Job Location = DC, Hire date = 06/15/2008
b) Jane Doe, Domain = HR, Job Location = MD, Hire date = 04/05/2007
c) Bob Thomas, Domain = EHS, Job Location = DC, Hire date = 07/08/2007
d) Jan Jones, Domain = IT, Job Location = VA, Hire date = 10/30/2006

Slide 19: Knowledge Check
### Adding Rules to the AP

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.

---

### Associating Learning

- 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, select 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.

---

Slide 20: Adding Rules to the AP

Slide 21: Associating Learning
Demonstration: Assignment Profile

Slide 22: Demonstration: Assignment Profile
Demonstration: Assignment Profile

To add a new assignment profile:

1. Navigate to Users > Assignment Profiles.
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 email 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.
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 “X”.
26. Select Cancel to return to the main assignment profile screen.
27. In the Recommended Next box, select **Add Curricula**.

28. Select **Add 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.

35. 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 impacted by the assignment profile.

The Job Aid: Assign Learning via Assignment Profile is available in the VA TMS.
Activity #2: Assignment Profile

System Practice

Slide 23: Activity #2: Assignment Profile
**Activity #2: Assignment Profile**

To add a new assignment profile:

1. Navigate to Users > Assignment Profiles.
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 email 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, search in the TRAIN domain.
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 “X”.
26. Select Cancel to return to the main assignment profile screen.
27. In the Recommended Next box, select **Add Curricula**.
28. Select **Add 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.
35. 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 impacted by the assignment profile.

The Job Aid: Assign Learning via Assignment Profile is available in the VA TMS.
Use Assignment Profiles for Free Standing Items

- Previously, free-standing items did not exist.
- Any items that were used in the VA TMS had to be attached to a curriculum, and it was that curriculum that was used in reports, profiles, assignments, and so on.
- With the recent VA TMS upgrade, there are now free-standing items and they can be linked to assignment profiles.

Slide 24: Use Assignment Profiles for Free Standing Items

New Feature

The VA TMS now supports free-standing items. As a result, there are two new tabs to help manage functionality:

- A read-only Assignment Profiles tab on the item record
- An editable Items tab on the assignment profile record

Slide 25: New Feature
Read-Only Assignment Profiles Tab
From an item, select the new Assignment Profiles tab to display a list of Assignment Profiles to which it belongs.

Slide 26: Read-Only Assignment Profiles Tab

Items Tab
From an assignment profile, select the new Items tab to view, add, or remove items from a user’s To-Do List.

Slide 27: Items Tab
Demonstration: Adding an Item to an Assignment Profile from the Items Tab

Slide 28: Demonstration: Adding an Item to an Assignment Profile from the Items Tab
Demonstration: Adding an Item to an Assignment Profile from the Items Tab

From the VA TMS homepage:

1. To add an item to an assignment profile, you will first need to open an assignment profile.
2. Navigate to Users and select Assignment Profile.
3. Search for a current assignment profile. First, click in the Assignment Profile ID field.
4. For this example, enter “KN-Test”.
5. Select Search.
6. A list of results is displayed. Select the first option, KN-Test.
7. The assignment profile is now displayed. Select the Items tab.
8. Select the green Add Item icon.
9. The Add Item pop-up window is displayed. You will now search for an item to add to the assignment profile. Click in the Description field.
10. Enter “Learning Web Design”.
11. Select Search.
12. An item is displayed. Select the check box to the right of the Learning Web Design title.
   
   Note: If you need to, you can add multiple items at this point.
13. Select Add.
14. The Assignment Profile record is now displayed with the free-standing item attached.
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

Slide 29: Other Items to Associate

Recommendating Items

- As an administrator, you can enable the item recommendations setting.
- Once done, you can add one or more items to the Recommended Items tab of an assignment profile when you want to recommend those items to the users in the assignment profile.

Slide 30: Recommending Items
Recommended Item Statuses

Once an item has been recommended, it can have one of three statuses:

- Valid Status (the assignment profile has been propagated)
- Add Pending (the assignment profile has not been propagated)
- Delete Pending (the assignment profile has not been propagated)

Slide 31: Recommended Item Statuses

Removing an Item

If you remove an item that has the status Add Pending, you can cancel the action without propagating it.

Slide 32: Removing an Item
### Required Date Assignment

Items with required dates cannot be assigned by an assignment profile if the Initial Basis list has either of the two settings:

- Calendar
- Event, with a blank Initial Number

To be assigned, it must have neither option selected, or a number entered for the event.

---

### Changing an Initial Assignment

- Assignment Profile Synchronization (APM) automatic process begins
- Modified Item IS NOT reassigned to users who have already been assigned the item
- Modified Item IS reassigned with updated attributes if user attributes have changed since the APM
2.4 Lesson 3: Automatic Process Manager (APM) and Synchronization

Lesson 3:
Automatic Process Manager (APM) and Synchronization

Slide 35: Lesson 3: Automatic Process Manager (APM) and Synchronization

Notes:

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.

Slide 36: Automatic Process Manager (APM)
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 select Synchronize, you can schedule the job to run immediately or in the background

Slide 37: Manual Synchronization

Related Reports

The following are reports in VA TMS that relate to Assignment Profiles:
- Learning Needs
- To-Do List
- Curriculum Status
- Curriculum Item Status

Slide 38: Related Reports
Knowledge Check

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

a) True  
b) False

Slide 39: Knowledge Check

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.

Slide 40: Evaluation & Self-Certification Reminder
Slide 41: Questions