VA TMS Upgrade Training: Versions b1408-b1502

Virtual Instructor-Led Training

Participant Guide

Final

July 28, 2015
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1.0 About This Course

1.1 Course Purpose
The purpose of the VA TMS Upgrade Training is to provide information regarding new functionality within the VA TMS as a result of a recent upgrade to all administrators who may use the new features in their position.

1.2 Participant Guide
The Participant Guide contains copies of all PowerPoint slides with room for taking notes and step-by-step instructions for each demonstration.

The Participant Guide is divided into two sections:

- About This Course
- Course Content

1.3 Target Audience
The target audience for this upgrade training is all VA TMS administrators who may use the new features in their position.

1.4 Participant Preparation
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 Demonstrations
During this training session, the instructor will demonstrate the new features in the VA TMS. The instructor asks that you watch the screen and take any notes if necessary. In this guide, the steps for completing each demonstration are included so that you can either read them and follow along or complete them yourself in the VA TMS at a later time.

1.6 Web Conferencing Software Policies
Please mute your phone line for the duration of the training session. If you have any questions during the session, you may send a chat message to the host. The instructor may answer your question immediately or wait until the end, but all questions will be answered. Please do not unmute your phone to ask a question during the training session.
1.7 Participant Guide Icons

Table 1 illustrates the icons that are used throughout this Participant Guide.

Table 1: Icons and Descriptions

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon.png" alt="Icon" /></td>
<td>This icon indicates that there will be a demonstration conducted by the instructor using VA TMS.</td>
</tr>
</tbody>
</table>
2.0 Course Content

2.1 Welcome and Training Overview

Slide 1: VA TMS Upgrade Training: Versions b1408-b1502

Notes:

Training Agenda

- Feature #1: Custom Columns in Scheduled Offering Registration Form
- Feature #2: Catalog Search Enhancements
- Feature #3: Curricula Deactivation Wizard
- Feature #4: Multi-Instructor Surveys
- Feature #5: Document Attachment to Scheduled Offerings
- Feature #6: Improved Content Import
- Feature #7: Assignment Profile Inactivation

Slide 2: Training Agenda

Notes:
Slide 3: Training Agenda (cont’d)

- Feature #8: Reporting Alternate Subordinates
- Feature #9: Assignment Profile and Organization Search Enhancements
- Feature #10: Status Indicators on Scheduled Offering Record
- Feature #11: Recording Learning from Users’ To-Do Lists
- Feature #12: Waitlist Auto-Fill When Max Registration is Increased

Notes:

Slide 4: Training Purpose

- Introduce new features and functionality in VA TMS: Versions b1408-b1502.
- Prepare you to perform your admin job in the VA TMS successfully.

Notes:
2.2 Feature #1: Custom Columns in Scheduled Offering Registration Form

Feature #1: Custom Columns in Scheduled Offering Registration Form

- Admins can assign custom columns to scheduled offerings to collect data during the registration process.
- Users can complete the custom column information on the form.
- Admins can modify at any time and sign the registration form.

Slide 5: Feature #1: Custom Columns in Scheduled Offering Registration Form

Notes:

Demonstration: Custom Columns in Scheduled Offering Registration Form

Slide 6: Demonstration: Custom Columns in Scheduled Offering Registration Form

Notes:
Demonstration: Custom Columns in Scheduled Offering Registration Form

Create Custom Columns:

From the admin home page:

1. Select **Learning**.
2. Select **Scheduled Offering**.
3. Select **Add New**.
4. Select the **Item** radio button.
5. Select **Department of Veteran Affairs (VA)** for the **Item Type**.
6. Select the magnifying glass for **Item ID**.
7. Enter **3730266** in the Item ID field.
8. Select **Search**.
9. Select **Item ID: 3730266** from the search results.
10. Select the magnifying glass for **Domain**.
11. Enter **DVA** in **Domain ID**.
12. Select **Search**.
13. Select **DVA** from the search results.
14. Enter **08/04/15** in the **Start Date**.
15. Enter **1:00 PM** in the **Start Time**.
16. Select the **Custom Columns** drop-down arrow.
17. Select **Custom Columns**.
18. Select **Search**.
19. Place a checkmark in the **Add** box in **Column 5: Will you be utilizing Government reimbursed travel?**
20. Select **Add**.
21. Select **Save**.
22. You have successfully added a custom column to scheduled offering.
2.3 Feature #2: Catalog Search Enhancements

Feature #2: Catalog Search Enhancements

- Keyword searching
- Splits the search phrase into tokens
- Can force an exact phrase search with double quotes ("")
- Results displayed by relevancy rather than alphabetical
- Type ahead search term suggestions
- Additional search character for wildcard: an asterisk (*)
- Calendar month and weekly views display item titles
- My Region searches

Notes:

Slide 7: Feature #2: Catalog Search Enhancements

Feature #2: Catalog Search Enhancements (cont’d)

Notes:

Slide 8: Feature #2: Catalog Search Enhancements (cont’d)
2.4 Feature #3: Curricula Deactivation Wizard

Feature #3: Curricula Deactivation Wizard

- Curricula deactivation wizard resolves relationships while deactivating items or curricula.
- Curricula have many relationships.
- Previously, admins managed the deactivation individually.

Slide 9: Feature #3: Curricula Deactivation Wizard

Feature #3: Curricula Deactivation Wizard (cont’d)

Slide 10: Feature #3: Curricula Deactivation Wizard (cont’d)
2.5 Feature #4: Multi-Instructor Surveys

Feature #4: Multi-Instructor Surveys

- Admins can now create course feedback surveys for courses that include more than one instructor.
- Previously, course feedback surveys supported only one instructor.
- The survey must be attached to a learning item; item must have an instructor resource.

Slide 11: Feature #4: Multi-Instructor Surveys

Notes:

Feature #4: Multi-Instructor Surveys (cont’d)

Slide 12: Feature #4: Multi-Instructor Surveys (cont’d)
Slide 13: Feature #4: Multi-Instructor Surveys (cont’d)

Slide 14: Demonstration: Multi-Instructor Surveys
Demonstration: Multi-Instructor Survey

From the admin home page:

1. Select **Learning**.
2. Select **Questionnaire Surveys**.
3. Select **Add New**.
4. Enter **DVA Level 1 TMS Survey** in the **Survey ID** field.
5. Enter **VA TMS Survey** in the **Name** field.
6. Select the drop-down arrow for the **Evaluation level**.
7. Select **Item Evaluation: User Satisfaction**.
8. Enter **Survey to assess instructor effectiveness** in the **Description**.
9. Leave **Comments** blank.
10. Select the magnifying glass for **Domain**.
11. Enter **DVA** in **Domain ID. Note**: Admins must be sure to enter their own domain when creating a survey.
12. Select **Search**.
13. Select **DVA**.
14. Select **Questions** in the left-hand menu.
15. Enter **Please complete the survey by responding to the following questions** in the **Survey Instructions**.
16. Select the drop-down arrow next to **Resource Type**. Notice that now you have an Instructor choice. This feature allows you to enter questions for multiple instructors.
17. Select **Instructor**.
18. Explain that you would complete the rest of the questions field per usual, making sure that you enter all instructor questions on page 1. The system will duplicate the instructor questions for all instructors.
2.6 Feature #5: Document Attachment to Scheduled Offerings

Feature #5: Document Attachment to Scheduled Offerings

- Provides the ability for scheduled offerings to have a separate association to documents, just as items do.
- Allows admins to post documents such as agendas and specific offering related material at the scheduled offering level.

Slide 15: Feature #5: Document Attachment to Scheduled Offerings

Demonstration: Document Attachment to Scheduled Offerings

Slide 16: Demonstration: Document Attachment to Scheduled Offerings
Demonstration: Document Attachment to Scheduled Offerings

Attach Documents to Scheduled Offerings

From the admin home page:

1. Select Learning.
2. Select Scheduled Offerings.
3. Enter 2702722 in the Scheduled Offering ID field.
4. Delete the date in the Start Date After field.
5. Select Search.
6. Select 2702272 from the search results.
7. Select More.
8. Select Documents in the left-hand menu.
9. Select add one or more from list.
10. Select Search.
11. Check the Add box for documents you wish to add. NOTE: If admins wish to add additional documents to those listed in the system, they must put in a request to the Help Desk who will then forward it to IPT.
12. Select Add.
13. Select Apply Changes.
14. You have successfully attached documents to a scheduled offering.

View Scheduled Offerings that Use a Particular Document (Content Administrators)

From the admin home page:

1. Select Content.
2. Select Documents.
3. Enter 2702722 in the Scheduled Offering ID field. NOTE: If the Scheduled Offering ID doesn’t appear, add it from Add/Remove Criteria.
4. Select Search.
5. The documents that are attached to the Scheduled Offering are listed.
6. Select the **magnifying glass** to view details about the document.

7. Select the **pencil icon** to edit the document.

8. You have successfully view documents that are attached to a scheduled offering.
2.7 Feature #6: Improved Content Import

Slide 17: Feature #6: Improved Content Import

Notes:
2.8 Feature #7: Assignment Profile Inactivation

**Feature #7: Assignment Profile Inactivation**

- Admins now have the ability to inactivate an assignment profile.
- They also have the option of un-assigning the learning elements assigned through the assignment profile.
- Inactivated assignment profiles can be re-propagated to become active again.

Slide 18: Feature #7: Assignment Profile Inactivation

**Feature #7: Assignment Profile Inactivation (cont’d)**

Notes:

Slide 19: Feature #7: Assignment Profile Inactivation (cont’d)
2.9 Feature #8: Reporting Alternate Subordinates

Slide 20: Feature #8: Reporting Alternate Subordinates
2.10 Feature #9: Assignment Profile and Organizational Search Enhancements

Slide 21: Feature #9: Assignment Profile and Organization Search Enhancements

Slide 22: Feature #9: Assignment Profile and Organization Search Enhancements (cont’d)
Feature #10: Status Indicators on Scheduled Offering Record

- Users who have not completed the scheduled offering have a grey icon.
- Users who have completed the scheduled offering have a green icon.

Slide 23: Feature #10: Status Indicators on Scheduled Offering Record

Feature #10: Status Indicators on Scheduled Offering Record (cont’d)

- Admins can hover over the user to see additional details.

Slide 24: Feature #10: Status Indicators on Scheduled Offering Record (cont’d)
2.11 Feature #11: Record Learning from Users’ To-Do List

Feature #11: Recording Learning from Users’ To-Do Lists

When viewing an employee’s To-Do List, supervisors can now record a learning event.

Slide 25: Feature #11: Recording Learning from Users’ To-Do Lists
2.12 Feature #12: Waitlist Auto-Fill When Max Registration is Increased

- Admins can now auto-fill from the waitlist when the maximum registration is increased.
- Select View All from the Scheduled Offering record to turn Auto Fill Registration On or Off.

Slide 26: Feature #12: Waitlist Auto-Fill When Max Registration is Increased
2.13 Summary

Slide 27: Questions?

Slide 28: Contact Information

Notes: