VA TMS Domain Manager and Learning Manager Administrator Course

Session 3 of 3

Virtual Instructor-Led Training
Participant Guide

May 2015
Table of Contents

1.0 Session 3 of 3 ................................................................................................................................. 3
  1.1 Welcome and Introduction ........................................................................................................ 3
  1.2 Lesson 1: The Evaluation Process ........................................................................................... 9
  1.3 Lesson 2: Item Evaluation ........................................................................................................ 13
  1.4 Lesson 3: Learning Evaluation .................................................................................................. 33
  1.5 Lesson 4: Follow-Up Evaluation ................................................................................................ 38
  1.6 Lesson 5: User Survey Completion ............................................................................................ 46
  1.7 Lesson 6: Evaluation Reports .................................................................................................... 49
  1.8 Lesson 7: Running Reports ....................................................................................................... 56
1.0 Session 3 of 3

1.1 Welcome and Introduction

Slide 1: VA TMS Domain Manager and Learning Manager Administrator Course: Welcome and Introduction

Participant Introductions

- Your name
- Where you work
- One expectation for this course

Slide 2: Participant Introductions
Slide 3: Logistics

- Scheduled breaks
- Mute phone lines/don’t put call on hold
- Feel free to ask questions

Slide 4: Course Goal

Course Goal

Provide instruction and interactive practice on the core concepts and administrative functions of the VA TMS specific to DM and LM job functions.
### Course Objectives

After completing this course, you will be able to:
- Navigate and utilize Veterans Administration (VA) Talent Management System (TMS) functionality
- Create and configure items and curricula
- Create and configure online learning
- Create and configure scheduled offerings
- Create learning evaluations
- Assign learning, register participants, and record learning events
- Run, schedule, and save reports

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Slide 5: Course Objectives

### Course Structure

- Three separate web conferencing sessions
- Each no longer than 4 hours in length
- Each session organized into lessons and topics

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Slide 6: Course Structure
Slide 7: Training Methods

Slide 8: Participant Guide

Notes:
Slide 9: Session 3 Overview

- Lesson 1: The Evaluation Process
- Lesson 2: Item Evaluation
- Lesson 3: Learning Evaluation
- Lesson 4: Follow-Up Evaluation
- Lesson 5: User Survey Completion
- Lesson 6: Evaluation Reports
- Lesson 7: Running VA TMS Reports

Slide 10: Session 3 Objectives

- Describe the process for assessing effectiveness of items
- Describe the process for assessing user learning
- Run training evaluation reports
- Run VA TMS reports
Slide 11: Questions?
1.2 Lesson 1: The Evaluation Process

Lesson 1: The Evaluation Process

Slide 12: Lesson 1: The Evaluation Process

Lesson 1 Objectives

After completing this lesson, you will be able to:

- Identify all levels of evaluation
- Describe the evaluation process

Slide 13: Lesson 1 Objectives
Kirkpatrick’s Evaluation Model

The four levels of Kirkpatrick's Evaluation Model measure:

- Level 1: Student Reaction
- Level 2: Learning
- Level 3: Behavior
- Level 4: Results

Steps to Implement the Model

1. Identify training program(s) (item) to be evaluated – Online communication course.
2. Create survey to capture users’ reactions to the training.
3. Create pre- and post-exams (using Question Editor (QE)).
4. Create survey to follow-up on behavioral change or application of learning after the training.
5. Configure item(s) survey tab.
6. Assign learning needs to users.
7. User completes survey(s) upon completion of item.
8. Run report(s) to analyze results.

Slide 14: Kirkpatrick’s Evaluation Model

Slide 15: Steps to Implement the Model
Preconfigured Requirements

Exams:
- Created using Question Editor
- Pre- and post-exams created ahead of time

Item Record:
- Must exist before survey can be associated

Completion Status Configuration:
- Review and revise ahead to allow for follow-up surveys

Rating Scales:
- Establish at least two different rating scales before creating surveys

Sample Rating Scales

Commonly used five-point rating scale (evaluation):

<table>
<thead>
<tr>
<th>Unsatisfactory</th>
<th>Needs Work</th>
<th>Satisfactory</th>
<th>Exceeds Expectations</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Commonly used follow-up evaluation five-point rating scale:

<table>
<thead>
<tr>
<th>Never</th>
<th>Seldom</th>
<th>Mostly</th>
<th>Frequently</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>
Knowledge Check
What is the final step in any training program?
   a) Analysis
   b) Development
   c) Formative Evaluation
   d) Summative Evaluation

Slide 18: Knowledge Check

Questions?

Slide 19: Questions?
1.3 Lesson 2: Item Evaluation

Lesson 2: Item Evaluation

Notes:

Slide 20: Lesson 2: Item Evaluation

Lesson 2 Objectives

After completing this lesson, you will be able to:

- Describe the process for creating and editing item evaluation surveys
- Preview and publish an item evaluation survey
- Associate a survey with an item

Notes:

Slide 21: Lesson 2 Objectives
**Item Evaluation**

- An item evaluation is a questionnaire survey that is built to assess a user’s reaction to a training event.
- Questions asked on a typical item evaluation survey cover the basics of a course and can be grouped according to focus area.

Slide 22: Item Evaluation

**Sample Focus Areas**

- General Feedback
- Materials
- Instructor
- Goals of Program Met

Slide 23: Sample Focus Areas
Types of Questions

- Relevance of the objectives
- Ability of the course to maintain interest
- Number and appropriateness of interactive exercises
- Ease of navigation
- Perceived value and transferability to the workplace

Slide 24: Types of Questions

Four Question Types

1. Rating Scale:
   - Use for quantitative results
2. One Choice:
   - Use when you want the user to choose one answer from a group
3. Multiple Choice:
   - Use when you want the user to be able to choose multiple answers
4. Open Ended:
   - Use when you want the user to type an answer

Slide 25: Four Question Types
Demonstration: Item Evaluation Steps

Notes:

Slide 26: Demonstration: Item Evaluation Steps
Demonstration: Item Evaluation Steps

To complete an item evaluation:

1. Navigate to Learning > Questionnaire Surveys.
2. Select Add New.
3. Enter a survey ID.
4. Enter a survey name.
5. Select an evaluation level (for this example, select Item Evaluation: User Satisfaction).
6. Enter survey description.
7. Enter comments.
8. Select a domain.
9. Check Active checkbox.
10. Select Add.
11. Select the Questions tab.
12. Enter survey instructions.
14. Enter first page instructions.
15. Select Add Question icon.
16. Enter question stem.
17. Select question type (rating scale).
18. Select a rating scale.
19. Repeat steps 15–18 to add additional questions.
20. Select Add Page icon.
22. Enter second page instructions.
23. Select Add Question icon.
24. Enter question stem.
25. Select question type (rating scale).

26. Select a rating scale.

27. Repeat steps 23–26 to add additional questions.

28. Select **Save Draft**.
System Login

- Go to [https://va-train2.plateau.com/learning/admin/login.do](https://va-train2.plateau.com/learning/admin/login.do)
- Enter your TRAIN Admin Username
- Enter your TRAIN Admin Password

Activity #1: Create a Survey

System Practice

Notes:

Slide 27: System Login

Notes:

Slide 28: Activity #1: Create a Survey
Activity #1: Create a Survey

1. Navigate to Learning > Questionnaire Surveys.
2. Select Add New.
3. Enter a survey ID.
4. Enter a survey name.
5. Select an evaluation level (for this example, select Item Evaluation: User Satisfaction).
6. Enter survey description.
7. Enter comments.
8. Select a domain.
9. Check Active checkbox.
10. Select Add.
11. Select the Questions tab.
12. Enter survey instructions.
14. Enter first page instructions.
15. Select Add Question icon.
16. Enter question stem.
17. Select question type (rating scale).
18. Select a rating scale.
19. Repeat steps 15–18 to add additional questions.
20. Select Add Page icon.
22. Enter second page instructions.
23. Select Add Question icon.
24. Enter question stem.
25. Select question type (rating scale).
26. Select a rating scale.

27. Repeat steps 23–26 to add additional questions.

28. Select Save Draft.

Scenario:

An online course on how to deal with customers, conflict, and confrontation has been created. You are responsible for creating the item evaluation survey to be assigned to all users immediately after the course is completed. This is the general course evaluation survey to be used after every online HR course.

Task:

Write down additional questions for each page of this survey. Each question will be a rating scale type using the five-point scale (created previously). The comments question at the end of each page is an open-ended question type.

NOTE: This data will be used to complete the next activity.

Survey Instructions: Please help us improve our quality. Your feedback is important to us. Complete the survey to the best of your ability.

Page 1 Title: General Course Feedback (question type: rating scale)

Page 1 Instructions: Please complete the following questions to the best of your ability.

1. The training was relevant to my job.

Page 2 Title: Training Materials Feedback (question type: same rating scale as above)

Page 2 Instructions: Please complete the following questions to the best of your ability.

1. The visual aids were accurate and of good quality.

Page 3 Title: Online Instructions (question type: same rating scale as above)

Page 3 Instructions: Please complete the following questions to the best of your ability.

1. The directions on how to use the online course were communicated effectively.

Page 4 Title: Training Methods Feedback (question type: same rating scale as above)

Page 4 Instructions: Please complete the following questions to the best of your ability.

1. The right information was covered at the right speed for me.
Configuration Options

- Anonymous completion
- Completion required to move to Completed Work
- Required-By date
- A comments section can be added after each question for additional feedback

Slide 29: Configuration Options

Notifications

There are two notification templates associated with the questionnaire survey functionality:

- Email Template
- Roll-Up Email Template

Slide 30: Notifications
Preview and Publish

- Once created, preview the draft survey before publishing it

Notes:

Slide 31: Preview and Publish

Demonstration: Configuring, Previewing, and Publishing Surveys

Notes:

Slide 32: Demonstration: Configuring, Previewing, and Publishing Surveys
Demonstration: Configuring, Previewing, and Publishing Surveys

Configuring Surveys:
1. Access the survey records you created in the previous activity.
2. Select the Options tab.
3. Select Yes for anonymous surveys.
4. Check the Required for Item Completion checkbox.
5. Enter number of days to complete survey from assignment.
6. Select option to include comments field for each question.
7. Select Apply Changes.
8. Select the Notifications tab.
9. If necessary, edit body of notification message.
10. Select Apply Changes.
11. If necessary, select Browse to add an attachment to notification.
12. Select Apply Changes.

Previewing and Publishing Surveys:
1. Select the Questions tab.
2. Select Preview.
3. Select Draft from drop-down menu.
4. Review preview of survey.
5. Select Close to close preview of survey.
6. Select Publish. The survey is now ready for use.
Activity #2: Configuring, Previewing, and Publishing Surveys

System Practice

Slide 33: Activity #2: Configuring, Previewing, and Publishing Surveys
Activity #2: Configuring, Previewing, and Publishing Surveys

Configuring Surveys:

1. Access the survey record you created in the previous activity.
2. Select the Options tab.
3. Select Yes for anonymous surveys.
4. Check the Required for Item Completion checkbox.
5. Enter number of days to complete survey from assignment.
6. Select option to include comments field for each question.
7. Select Apply Changes.
8. Select the Notifications tab.
9. If necessary, edit body of notification message.
10. Select Apply Changes.
11. If necessary, select Browse to add an attachment to notification.
12. Select Apply Changes.

Previewing and Publishing Surveys:

1. Select the Questions tab.
2. Select Preview.
3. Select Draft from drop-down menu.
4. Review preview of survey.
5. Select Close to close preview of survey.
6. Select Publish. The survey is now ready for use.

The Job Aid: Item Evaluation Survey (Task C) is available in the VA TMS.
**Session 3**

**VA Talent Management System**

### Associate the Survey

Associate a survey with an item:

- Within an item record from the Evaluations tab

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**Slide 34: Associate the Survey**

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### Only One Survey per Item

If a survey is already associated with an item, you will receive a warning message if you attempt to associate another survey.

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**Slide 35: Only One Survey per Item**

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Notes:
Demonstration: Associate the Survey

Slide 36: Demonstration: Associate the Survey
Demonstration: Associate the Survey

1. Navigate to Learning<Items.
2. Enter search criteria for the item to which you want to associate a survey.
3. Select Search.
4. Select the item from the search results.
5. Select More in the Related area of the item record.
6. Select the Evaluations tab.
7. Select the Survey magnifying glass.
8. Enter search criteria for the survey you want to locate.
10. Select the survey from the search results.
11. Select Apply Changes.
12. Depending on how the survey was configured, the Days to Complete field and the Required for Completion checkbox may or may not be auto-filled. If necessary, change these fields. If desired, enter or change the Days to Complete number and check/uncheck the Required for Item Completion checkbox.
13. If any changes are made, select Apply Changes to save your modifications.
Activity #3: Associate the Survey

System Practice

Slide 37: Activity #3: Associate the Survey
Activity #3: Associate the Survey

1. Navigate to Learning<Items.
2. Enter search criteria for the item to which you want to associate a survey.
3. Select Search.
4. Select the item from the search results.
5. Select More in the Related area of the item record.
6. Select the Evaluations tab.
7. Select the Survey magnifying glass.
8. Enter search criteria for the survey you want to locate.
10. Select the survey from the search results.
11. Select Apply Changes.
12. Depending on how the survey was configured, the Days to Complete field and the Required for Completion checkbox may or may not be auto-filled. If necessary, change these fields. If desired, enter or change the Days to Complete number and check/uncheck the Required for Item Completion checkbox.
13. If any changes are made, select Apply Changes to save your modifications.

The Job Aid: Item Evaluation Survey is available in the VA TMS.
Knowledge Check

To create a survey, navigate to _____ and select the Questionnaire Surveys tab:

a) Commerce  
b) Content  
c) Learning  
d) Performance

Slide 38: Knowledge Check

Questions?

Slide 39: Questions?
1.4 Lesson 3: Learning Evaluation

Lesson 3: Learning Evaluation

Slide 40: Lesson 3: Learning Evaluation

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Describe how to associate exams with an item as pre- or post-exams

Slide 41: Lesson 3 Objectives

Notes:
Learning Evaluation

- The purpose of the pre- and post-exams is to assess the user's knowledge of the content prior to the training and then just after the training.
- Questions for exams are created in Question Editor.
- Best practice is to associate questions with objectives.

Sample Learning Evaluation Report

If the training program is effective, there will be a demonstrative increase in knowledge when the two exam results are compared.
Activity #4: Associate the Evaluation

System Practice

Slide 44: Activity #4: Associate the Evaluation
Activity #4: Associate the Evaluation

To associate pre- and post-exams:

1. Navigate to Learning > Items.
2. Search for and access an item record in edit mode.
3. Select More from the Related area.
4. Select the Evaluations tab.
5. In the Learning Evaluation: Mastery of Content section, select the drop-down menu for pre-exam and select the desired exam.
6. Select the drop-down menu for post-exam and select the desired exam. Note: You will not be able to select the same exam for pre- and post-tests. You must select two different exams.
7. Select Apply Changes.

The Job Aid: Associate Pre- and Post-Exams—Learning Evaluation is available in the VA TMS.
Knowledge Check

Within an Item Record, which of these best represents the location to associate a survey with an item?

a) Related Area > More > Evaluations
b) Area > Summary
c) Actions Area > Schedule
d) Related Area > Prerequisites

Slide 45: Knowledge Check

Questions?

Slide 46: Questions?
1.5 Lesson 4: Follow-Up Evaluation

Lesson 4: Follow-Up Evaluation

Slide 47: Lesson 4: Follow-Up Evaluation

Lesson 4 Objectives

After completing this lesson, you will be able to:

- Describe the process for creating and editing follow-up evaluation surveys
- Publish a follow-up evaluation survey

Slide 48: Lesson 4 Objectives
Follow-Up Evaluation

- Follow-up evaluations attempt to answer whether learners’ behaviors actually change as a result of new learning
- Functionally, the creation of a follow-up evaluation is the same as an item evaluation questionnaire survey

Questions for Follow-Up Evaluations

Questions can be reworded from item evaluation surveys to best fit the need of the program and evaluation methodology. For example:

Before:
- Did the representative open each customer dialogue with a product benefit statement, followed by a request to proceed?

Once reworded:
- How often did the representative open each customer dialogue with a product benefit statement, followed by a request to proceed?
Activity #5: Create the Follow-Up Evaluation

System Practice

Slide 51: Activity #5: Create the Follow-Up Evaluation
Activity #5: Create the Follow-Up Evaluation

Scenario: When the online course on how to deal with customers, conflict, and confrontation is finished by employees, they will need to complete a follow-up evaluation survey. You are responsible for creating the questions for the follow-up evaluation survey to be assigned to all users and supervisors. In the next activity, we will configure the survey.

Task: Using the previous labs in this course as a guide, complete the following tasks on your own:

1. Create a follow-up evaluation survey using the sample questions on the next page.
2. Write additional questions for each page of this survey. The comments question at the end of each page is an open-ended question type.

Survey Instructions: Please complete this survey to the best of your ability regarding your capabilities on dealing with confrontation and difficult people, before the training and after.

Page 1 Title: Rate your capability before the training. How did you deal with customer confrontation?

Page 1 Instructions: A lot of people cannot handle confrontation. They shake and lose control of their voice pitch, and cannot control their thoughts properly. It can be frustrating when someone is putting you down and you can’t argue back because you have confrontation jitters. This is the “fight or flight” response kicking in and it pumps adrenaline throughout your body in readiness to fight, or in readiness to run.

Answer these questions to see how you used to deal with confrontation before the training you received.

1. Before this training course, how often did you take a deep breath just before a confrontational situation or during it if necessary? This lowers your heartbeat and blood pressure.

Page 2 Title: Rate your capability after the training: How are you now able to deal with customer confrontation?

Page 2 Instructions: A lot of people cannot handle confrontation and start to shake; they lose control of their voice pitch, and cannot control their thoughts properly. It can be frustrating when someone is putting you down and you can’t argue back as you have a touch of confrontation jitters. This is the “fight or flight” response kicking in and it pumps adrenaline throughout your body in readiness to fight, or in readiness to run.

Answer these questions to see how well you now deal with confrontation since the training you received.
1. Since this training course, how often do you currently take a deep breath just before a confrontational situation or during it if necessary? This lowers your heartbeat and blood pressure.
### Configuration Options

- The follow-up evaluation can be assigned to users in a configurable number of days from item completion.
- A follow-up survey can be completed by the user only, the supervisor only, or both.
- A comments section can be added after each question for additional feedback.

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**Slide 52: Configuration Options**

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### Activity #6: Configure the Follow-Up Evaluation

**System Practice**

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**Slide 53: Activity #6: Configure the Follow-Up Evaluation**
Activity #6: Configure the Follow-Up Evaluation

1. Navigate to Learning > Questionnaire Survey.
2. Search for and select the follow-up survey just created in the activity.
3. Select the Options tab.
4. To configure the post-evaluation settings, enter a number of days from item completion to assign the follow-up survey, and a number of days to complete the survey.
5. Select the follow-up survey participants (employee, supervisor, or both).
6. Select option to include comments field for each question.
7. Select Apply Changes.
8. Select the Notifications tab.
9. If necessary, edit body of notification message.
10. Select Apply Changes.
11. If necessary, select Browse to add an attachment to notification.
12. Select Apply Changes.
13. Select the Questions tab.
14. Select Preview and then select Draft from drop-down menu.
15. Select Close to close preview of survey.
16. Select Publish. The survey is now ready for use.

The Job Aid: Follow-up Evaluation Survey is available in the VA TMS.

Scenario: The online course on how to deal with customers, conflict, and confrontation is ready to be released to users. You have created the follow-up evaluation survey questions, and configured the survey to be assigned to all users and supervisors 120 days after the course is completed, with seven (7) days to complete. Now associate the survey with the online item.

Task: Using the previous labs in this course as a guide, complete the following task on your own.

a) Associate the follow-up survey with the online item

The next activity will introduce how to configure the automatic process to trigger the evaluation.
Knowledge Check

If the same kind of survey is already associated with an item, ________

a) a second survey can be associated with the item after a set date

b) a warning message will appear upon attempts to associate additional surveys with the item, BUT the warning message can be overridden with the correct password

c) additional surveys can be associated with the item at any time

d) the system will not allow additional surveys to be associated with the item

Notes:

Slide 54: Knowledge Check

Questions?

Notes:

Slide 55: Questions?
1.6 Lesson 5: User Survey Completion

Lesson 5: User Survey Completion

Slide 56: Lesson 5: User Survey Completion

Lesson 5 Objectives

After completing this lesson, you will be able to:

• Launch and complete assigned surveys

Slide 57: Lesson 5 Objectives
Survey Completion
When a survey is assigned to a user, he or she will receive an e-mail and the survey displays in the user’s To-Do List.

Slide 58: Survey Completion

Survey Completion Last Page
When the user gets to the last page of the survey, a Submit button will be available to submit the completed survey. If a user does not complete the survey, the Save button allows the user to save and complete at a later time.

Slide 59: Survey Completion Last Page
Knowledge Check

If a user omits a question during an optional survey and attempts to submit the survey, he or she will receive which of the following:

a) A warning message to complete the question
b) An asterisk next to the survey in his or her Learning History
c) An e-mail alerting the user of the omission and instructions explaining how to re-access the survey if necessary
d) Nothing—the survey will submit as is

Slide 60: Knowledge Check

Questions?

Slide 61: Questions?
1.7 Lesson 6: Evaluation Reports

Lesson 6: Evaluation Reports

Slide 62: Lesson 6: Evaluation Reports

Lesson 6 Objectives

After completing this lesson, you will be able to:

- Launch evaluation reports

Slide 63: Lesson 6 Objectives
Slide 64: Item Evaluation Reports

- Item Evaluation Report
- Item Evaluation by Individual Response Report
- Item Evaluation by Instructor Report
- Learning Evaluation Report
- Follow-Up Evaluation Report

Slide 65: Item Evaluation Report

The Item Evaluation by Individual Response Report shows each user’s responses to the survey questions.
Item Evaluation by Instructor Report

The Item Evaluation by Instructor Report shows the mean score for each survey and survey page grouped according to the instructor.

Slide 66: Item Evaluation by Instructor Report

Learning Evaluation Report Example

The Learning Evaluation Report shows the training effectiveness of items based on the average pre-test and post-test mean scores.

Slide 67: Learning Evaluation Report Example
Follow-Up Evaluation Report

The Follow-Up Evaluation Report shows the mean score for each follow-up survey, survey page, and survey question.

Slide 68: Follow-Up Evaluation Report

Notes:

Follow-Up Evaluation by Individual Response Report

The Follow-Up Evaluation by Individual Response Report shows the mean score for each follow-up survey and survey page.

Slide 69: Follow-Up Evaluation by Individual Response Report
Activity #7: Report Search

System Practice

Slide 70: Activity #7: Report Search
Activity #7: Report Search

Optional: If there is time left in the training session, have the participants look at these identified reports on their own, and report back to the group on how they might use them.
Knowledge Check

The Learning Evaluation Report shows the training effectiveness of items based on which of the following:

a) Post-test mean scores
b) Pre-test and post-test mean scores
c) Pre-test mean scores
d) The grand mean

Slide 71: Knowledge Check
1.8 Lesson 7: Running Reports

Lesson 7: Running Reports

Slide 72: Lesson 7: Running Reports

Lesson 7 Objectives
After completing this lesson, you will be able to:
• Describe the reports interface tabs
• Demonstrate searching reports
• Review categories of reports
• Create and configure a report
• Run and schedule a report
• Show where to find saved reports
• Review report jobs

Slide 73: Lesson 7 Objectives
Slide 74: Reports Overview

The VA TMS Reports interface is broken down into three main tabs:

- Saved Reports
- Reports
- Report Jobs

Slide 75: Identifying the Reports Sections

The Run Report screen has two main sections:

1. Formatting
2. Criteria
Demonstration: Reports Overview
Demonstration: Reports Overview

Reports:
The most common use of the Reports tab is to run available reports within the system.

- To find the desired report, browse the provided list under the Reports tab or use the Search textbox and Browse By options on the left side of the Reports interface to search for reports by the title or description.

- To further assist in the search for a desired report, narrow the search results by checking the corresponding checkbox in the left-hand corner to select very specific categories of reports.

- Depending on your security privileges, you may also perform advanced report tasks from the Reports tab, such as changing the description of reports, importing and exporting reports and libraries for customization in Report Designer, and publishing and un-publishing reports.

- The functions that you are able to perform in the reports section are controlled by report workflows given to you by the system administrator.

Saved Reports:
Once you create a saved report, you can access the report and run it without reentering filtering options.

- Saved reports are located under the Saved Reports tab and are specific to your admin account, meaning that saved reports are not shared among admins in the system.

- A saved report is very similar to a saved search in the VA TMS—only the admin who created the saved report is able to see it. In this way, the saved report is similar to a saved search or a bookmark. Only the admin who created these can access them in his/her admin account.

Report Jobs:
The Report Jobs tab lists the current background report jobs which are automatically running in the background.

- Jobs are created under this tab when you schedule the report to occur on a recurring basis.

- On this tab, you can delete jobs from recurring or edit the schedule of when the report should run.
Reports Sections:

Section 1: Formatting

The top section of the Run Report screen contains the following formatting options:

- Modify the report title, header, and footer
- Determine the report destination (the location where the report engine returns the data). You can return the data to the browser or to a local file. When you select Browser, the report is displayed in the internet browser window. When Local File is selected, you must save the report to a local drive before you are able to open it.
- Determine the report format

Section 2: Criteria

The selected report dictates the criteria displayed at the bottom of the Run Report screen. This section provides all the tools and functionality for searching. Report pages filter the data that the report returns using specific search fields. Many reports, however, also contain the following controls for filtering the data that you want to return:

- **Mask User IDs:** For security reasons, the VA TMS can mask the user IDs so they display as a series of asterisks. Check the checkbox to hide user IDs
- **Case Sensitive Search:** You can choose to perform a case-sensitive search or a case-insensitive search. Case-sensitive searches return data elements only when the characters and case match. Case-sensitive searches run faster than case-insensitive searches
- **Page Break between Records:** For longer reports, there is an option to insert page breaks between records
- **Filter by Criteria:** Some fields in the report pages contain a Filter by Criteria link. When you select the link, a page opens that contains multiple search fields in which you can select a set of data rather than a single data element. For example, you can return the set of users who are in the job location Washington, DC, rather than entering multiple users in the search field

Filter information:

In this demonstration, we want to run a Learning History Report for all users who report to LMSUser. Specify the supervisor(s) in the user filter and apply that filter as a criterion in order for the report to be dynamic.

1. Access the Learning History Report.
2. Select the Filter by criteria icon next to the user criteria.
3. If necessary, select Add/Remove Criteria to add the supervisor search filter to the search screen.
4. The **Search Criteria** pop-up window displays.

5. Select the **Supervisors** checkbox.

6. Select **Select**.

7. The **Supervisor** search query displays.

8. To create the filter, select the **Filter by criteria** icon.

9. The **Create Filter by Supervisor** screen displays.

10. If you don’t know the supervisor’s ID, enter search criteria in the **Last Name** and **First Name** textboxes.

11. Select **Search**.

12. Your search results are displayed.

13. Select the **checkbox(es)** to select your choice(s).

14. Select **Add to Filter**. The criteria are added to the filter.

15. Select **Submit Filter**.

16. You are returned to your original search screen.

17. The supervisor search attribute has one (1) criterion selected for this filter.

18. You can modify this filter by selecting the **Filter by criteria** icon, or you can clear the filter by selecting the **Clear Filter** icon.

19. Select **Submit Criteria** to submit LMSUser as a criterion making the search dynamic.

20. You are returned to the original report screen, with a supervisor submitted as a criterion.

21. Now, if the subordinate assignment changes, the system automatically updates the search filter of this report, and runs a Learning History report on all users who report to LMSUser at the time the report is run.
Running Reports in the VA TMS

Each report differs based on the data you are requesting and returns different data elements.

Common reports used by the VA:
- Performance Review Status report
- User Plan Status report

Slide 77: Running Reports in the VA TMS

Demonstration: Running Reports

Slide 78: Demonstration: Running Reports
Demonstration: Running Reports

1. Navigate to Reports > Reports tab.

2. Find the report you want to run. Use the Search textbox to look for reports by title or description, or browse the reports in the list provided.

3. Select the proper category to narrow your search results.

4. Read the provided report description to verify that it is the report you want to run.

5. If the report is a member of a report group (reports that run the same query but whose results are grouped differently), select the Expand icon to the left of the report title to expand the group and see the reports that are part of the group.

6. When you find the report that you wish to run, select its title to open the Run Report form.

7. Complete the Run Report form to provide the report with the information that it needs to return the data you wish to display.

8. After formatting and criteria options have been determined, select Run Report to run the report immediately in the format you choose. If you selected Browser, the report displays in a separate browser window. If Local File was selected, you must first save the file to a local drive before you are able to open it.

FISMA Compliance Reports:

1. Navigate to Reports > Reports tab.

2. Enter FISMA in the search textbox.

3. Select the FISMA Compliance Reports link.

4. Select the FISMA Domain Summary link.

5. Make the desired changes to the formatting section.


7. Select Run this job immediately, if allowable.

8. Uncheck Notify via email upon completion.


10. Select Done.

User Plan Status Report:

1. Navigate to Reports.

2. Enter User Plan Status in the Search textbox.
3. Check the **Performance** category checkbox.

4. Select **Submit**.

5. Select the report title’s link.

6. In this case, select to generate the **User Plan Status** report as a CSV file.

7. Select **User Plan Status (CSV)**.

8. The **User Plan Status (CSV)** screen displays.

9. Select the report destination from the drop-down menu.

10. Select the format for the report output.

11. You can select the users from a list by selecting the **Create Filter** icon to filter the search or by entering the ID into the **User ID** textbox.

12. Select **Submit Criteria** to return to the **Run Report** screen.

13. Specify the date range as desired for the report.

14. Select **Run Report**.

15. Select to open the file with Microsoft Excel or save the file locally.

16. Select **OK**.
Activity #8: Running Reports

System Practice

Slide 79: Activity #8: Running Reports
Activity #8: Running Reports

Run a report:

1. Navigate to Reports > Reports tab.

2. Find the Training Compliance Detail report for at least three users in the TRAIN domain. You can use the users you created from Session 1, or use the search filter to find other users.

3. When you find the report that you wish to run, select its title to open the Run Report form.


5. Search and select at least three random users.

6. Uncheck the Summary checkbox.

7. After formatting and criteria options have been determined, select Run Report to run the report immediately.
Slide 80: Create Saved Reports

**Create Saved Reports**

- Keep the parameters you entered on the Run Report page
- It may be beneficial to submit criteria as filter options
- Stored under the Saved Reports tab of the Reports interface

Slide 81: Running Report Jobs

**Running Report Jobs**

You can schedule a report job three ways:
1. Run a job one time immediately
2. Run a job one time at a future date
3. Run a job on a recurring basis

The VA TMS provides two ways to receive the scheduled reports: by e-mail or by downloading a copy.
Creating Recurring Reports

You can schedule recurring reports on a:
- Daily basis
- Weekly basis (must select day of week)
- Monthly basis (must select date of month)

You must select time of day for report to run.

Slide 82: Creating Recurring Reports

Demonstration: Saved and Recurring Reports

Slide 83: Demonstration: Saved and Recurring Reports
Demonstration: Saved and Recurring Reports

Save a report:

1. Using the report you generated in the previous activity, add search and/or filtering criteria.
2. Select the Save Report button.
3. Enter a Saved Report ID.
4. Give the report an intuitive description. (Note: This will help you identify the report in the Saved Reports tab later.)
5. Select Save.
6. Retrieve the report from your Saved Report tab.

Schedule a job:

1. Access the saved report.
2. From the Run Report page, select the Schedule Job button.
3. Select the radio button for Schedule this job to recur as follows:
4. Select the radio button for Weekly.
5. Select Monday from the drop-down options.
6. Enter the time, 1:00 p.m. EST.
7. Ensure that the Time Zone is for America/New York (Eastern Standard Time).
8. Select the Finish button.
Activity #9: Saved and Recurring Reports

System Practice

Slide 84: Activity #9: Saved and Recurring Reports
Activity #9: Saved and Recurring Reports

Save a report:

7. Using the report you generated in the previous activity, add search and/or filtering criteria.

8. Select the Save Report button.

9. Enter a Saved Report ID.

10. Give the report an intuitive description. (Note: This will help you identify the report in the Saved Reports tab later.)

11. Select Save.

12. Retrieve the report from your Saved Report tab.

Schedule a job:

9. Access the saved report.

10. From the Run Report page, select the Schedule Job button.

11. Select the radio button for Schedule this job to recur as follows:

12. Select the radio button for Weekly.

13. Select Monday from the drop-down options.

14. Enter the time, 1:00 p.m. EST.

15. Ensure that the Time Zone is for America/New York (Eastern Standard Time).

16. Select the Finish button.
Slide 85: Activity #10: Reports Overview
Activity #10: Reports

Now that you have had a chance to look at the features of reports, go into the VA TMS on your own and complete the following scenario. Take about five to ten minutes to complete this activity.

**Item Status Report (Grouped by Items) Scenario:**

LMSADMIN.V0100 is the reports manager in the Train domain. Her domain manager just received a request from the Designated Learning Officer (DLO) to provide her with a list of names for everyone who has taken the Introduction to VA TMS Administrators Course (VA 3730266) and the Scheduling, Assignment, and Registrations Managers Course (VA 3730267) from 03/10/15 thru 04/10/15.

LMSADMIN.V0100 has been tasked to provide this information. After reviewing the task she decides she can provide the requested information to her domain manager by running an Item Status Report. She also decides that it is best to group the report by items.

Perform the required actions that LMSADMIN.V0100 must take to complete this task. Please save the report after completing this task.
Knowledge Check

To look for reports by title or description, you can use the ___.

a) Email text box
b) Last Name text box
c) Search text box
d) User ID text box

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Slide 86: Knowledge Check

Knowledge Check

Which of the following is an available report format?

a) AVI
b) PDF
c) MP4
d) WMV

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Slide 87: Knowledge Check
**Knowledge Check**

Saved reports are available to whom?

- a) All admins
- b) All users
- c) The admin who created them
- d) The Scheduling Manager

Slide 88: Knowledge Check

**Knowledge Check**

To run a report in the background, you can do which of the following:

- a) Adjust the report format
- b) Create a saved report
- c) Bookmark a report
- d) Schedule a job

Slide 89: Knowledge Check
Session 3 Summary

- Describe the process for assessing effectiveness of items
- Describe the process for assessing user learning
- Demonstrate how to run training evaluation reports

Slide 90: Session 3 Summary

Questions?

Slide 91: Questions?
Course Evaluation Form

- Please take a few minutes to complete the course evaluation.
- Your feedback is important for improving future offerings of this course.

Slide 92: Course Evaluation Form