VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

May 2015
# Table of Contents

1.0 About This Training

1.1 Training Purpose

1.2 Target Audience

1.3 Training Length

1.4 Participant Guide

1.4.1 Participant Guide Icons

1.5 Participant Preparation and Guidelines

1.5.1 Requirements

1.5.2 Demonstrations and System Practice Activities in VA TMS

1.5.3 Virtual Instructor-Led Training Guidelines

1.6 VA TMS Administrators Role-Based Training Sessions and Target Audiences

1.7 VA TMS Functions and Associated Roles

2.0 Training Content

2.1 Welcome

2.2 Lesson 1: Scheduled Offerings

2.3 Lesson 2: Segments

2.4 Lesson 3: Registration

2.5 Lesson 4: Record Learning Events

3.0 Terminology
1.0 About This Training

1.1 Training Purpose
The purpose of the VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers is to review concepts, define key terminology, and practice processes associated with scheduling instructor-led items in the VA TMS.

1.2 Target Audience
This session is intended for VA TMS administrators responsible for creating and modifying scheduled offerings and classes in the VA TMS. It is a requirement for the following target audience:

- Scheduling Managers
- Assignment Managers
- Registration Managers

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.png" alt="Icon 1" /></td>
<td>This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon 2" /></td>
<td>This icon indicates that participants will complete an activity.</td>
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<tr>
<td><img src="image3.png" alt="Icon 3" /></td>
<td>This icon indicates that there is a job aid available for the task.</td>
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</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Session</th>
<th>Required for</th>
<th>Recommended for</th>
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</table>
| 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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2.0 Training Content

2.1 Welcome

Slide 1: Session Preparation

VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers
Registration Questions/No TRAIN ADMIN ID?
Email: clarence.bashhar@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.platseau.com/learning/admin/login.do. Use your TRAIN ADMIN ID and PASSWORD

Slide 2: VA TMS Administrators Role-Based Training

VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers
Session Agenda

- Welcome and Introductions
- Lesson 1: Scheduled Offerings
- Lesson 2: Segments
- Lesson 3: Registration
- Lesson 4: Record Learning Events
- Question and Answer

Slide 3: Session Agenda

Session Objectives

At the end of this session, you should be able to:

- Create a scheduled offering of an instructor-led item
- Add, copy, and revise segments of scheduled offerings
- Manage resources for segments of scheduled offerings
- Use the Record Learning tool to record completed learning for users

Slide 4: Session Objectives
Introductions

- Name
- Division of VA
- Experience with VA TMS
- Personal training goal

Session 5: Introductions
2.2 Lesson 1: Scheduled Offerings

Slide 6: Lesson 1: Scheduled Offerings

Lesson 1: Scheduled Offerings

Notes:

Lesson 1 Objectives

After completing this lesson, you will be able to:

- Create a new scheduled offering
- Identify the main areas of a scheduled offering record
- Copy a scheduled offering
- Cancel a scheduled offering

Slide 7: Lesson 1 Objectives
Scheduling Management

Scheduling management is a term used to describe the process of creating scheduled offerings within the VA TMS for instructor-led/blended items or schedule blocks.

Slide 8: Scheduling Management

Scheduled Offering

Scheduled offerings are scheduled items used to manage resources, user registration, and course duration.

- Places an instance of the item on the calendar
- Allows resources to be associated to it
- Allows users to be registered into it

After creating instructor-led/blended items, the next step is to schedule them for a specific date, time, and location in order to track user registration.

Slide 9: Scheduled Offering
Adding a New Scheduled Offering

- To add a new scheduled offering, select the item to schedule and determine a start date and time.
- Each scheduled offering is comprised of one or more segments. A segment is a block of time that can have resources assigned to it.
- Like items, scheduled offerings are made available to users via catalogs.

Slide 10: Adding a New Scheduled Offering

Ways to Add a New Scheduled Offering

1. Add Scheduled Offering
   Quick Link
2. Learning > Scheduled Offering > Add New
3. Add Scheduled Offering in the Search field
4. From the Item Record, choose “Schedule” in the Actions area

Slide 11: Ways to Add a New Scheduled Offering
Ad Hoc Facilities

- The Add New Scheduled Offering page now has a feature for entering Ad Hoc Facilities.

Ad Hoc Facilities (Cont’d)

- Scheduled offerings now support the assignment of an ad hoc facility for those offerings scheduled to take place at an external facility (e.g. hotel conference room).
- This is ideal when training is scheduled at locations that are not available as system records for re-use.
Delete Ad Hoc Facility
Admins can remove the ad hoc facility by selecting the link and then selecting **Delete**.

Preferred Region and Facility
- Users can now enter a preferred region and facility when requesting a scheduled offering.
- When region is selected, the facility list will default to those facilities in the selected region.
- No defined regions in VA TMS -- admins will need to identify and enter the information.
- Admins should **not** enable requests unless really necessary.
Slide 16: Preferred Region – User View

Notes:

Slide 17: Enable User Requests – Admin View
Item Requests Report

Admins can also run an Item Requests report which will generate a report to the point of contact.

- Item Requests
- Item Requests Group By User
- Item Requests Group By Request Reason
- Item Requests Group By Item
- Item Requests Group By Request Date
- Item Requests (CSV)
- Item Requests Group By Request Date

The Item Requests report returns a list of users and items, the users who have requested items but who have not yet.

Notes:

Slide 18: Item Requests Report

Filter Requests

Admins can filter the request list from the offering to facilitate registering the right people into the right offerings.

Notes:

Slide 19: Filter Requests
Equipment Search Defaults

- Equipment search defaults to location/facility on Add Scheduled Offering page.
- If equipment is not associated with the location/facility, all records will show unless there are domain restrictions.
- This feature will behave as it did in the past.

New Equipment Search Criteria

New search criteria is now available for equipment when adding a scheduled offering:

- **Availability** (can choose if available for entire offering)
- **Include Free Floating** (not associated with any other resources)
Slide 22: Search Equipment – Version B1305

Slide 23: Search Equipment – Version B1311
Demonstration: Add New Scheduled Offering

Slide 24: Add New Scheduled Offering
Demonstration: Add New Scheduled Offering

1. Log in to the VA TMS.
2. Select the Learning tab.
3. Select Scheduled Offerings tab on the left-hand side of the screen.
4. Select Add New. This opens the Add New Scheduled Offering window.
5. Select the Item type radio button.
6. Select the Item ID magnifying glass icon to search for the item to schedule.
7. Select an item from your search results.
8. Enter a description for this scheduled offering.
9. Specify a domain for the scheduled offering.
10. Check the Publish in all associated catalogs checkbox. NOTE: If you select the Publish in all associated catalogs checkbox, when you save the new scheduled offering the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes the scheduled offering visible and possibly available for users to self-register.
11. Select a start date, start time, and time zone. NOTE: The scheduled start date and time and the scheduled end date and time will appear below the scheduled information.
12. Select Preview to view the basic information for the offering (Optional).
13. Select the drop-down menu next to the plus sign by Facility.
14. Select Enter Ad Hoc Facility.
15. Enter information for the ad hoc facility on this page.
16. When you are finished, select Save.
17. Select Apply Changes.
18. Select “X” in the upper right-hand corner to return to the Add Scheduled Offering page.
19. You can remove what was added by selecting the link to the ad hoc facility and then selecting Delete.
20. If applicable, select the other resources associated with the scheduled offering: location, instructor, and equipment. Show the new equipment search criteria.

NOTE: Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.
21. Select **Save**.

22. If there are any warnings, the **Warning Details** screen displays. If this occurs, select **Yes** to continue.

23. The Schedule Offering record displays allowing you to make further configurations.

24. For use in future activities, record the system-generated **Scheduled Offering ID**, which is the numeric value located in the upper right corner of the Core area.

The Job Aid: Creating Scheduled Offerings is available in the VA TMS.
VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers
Participant Guide

Slide 25: System Login

Notes:

Go to https://va-train2.plat...Admin Password

Activity #1: Add New Scheduled Offering

System Practice

Slide 26: Activity #1: Add New Scheduled Offering
Activity #1: Add New Scheduled Offering

1. Log in to the VA TMS.
2. Select the Learning tab.
3. Select Scheduled Offerings tab on the left-hand side of the screen.
4. Select Add New. This opens the Add New Scheduled Offering window.
5. Select the Item type radio button.
6. Select the Item ID magnifying glass icon to search for the item to schedule.
7. Select an item from your search results.
8. Enter a description for this scheduled offering.
9. Specify a domain for the scheduled offering.
10. Check the Publish in all associated catalogs checkbox. NOTE: If you select the Publish in all associated catalogs checkbox, when you save the new scheduled offering the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes the scheduled offering visible and possibly available for users to self-register.
11. Select a start date, start time, and time zone. NOTE: The scheduled start date and time and the scheduled end date and time will appear below the scheduled information.
12. Select Preview to view the basic information for the offering. (Optional)
13. Select the drop-down menu next to the plus sign by Facility.
14. Select Enter Ad Hoc Facility.
15. Enter information for the ad hoc facility on this page.
16. When you are finished, select Save.
17. Select Apply Changes.
18. Select “X” in the upper right-hand corner to return to the Add Scheduled Offering page.
19. You can remove what was added by selecting the link to the ad hoc facility and then selecting Delete.
20. If applicable, select the other resources associated with the scheduled offering: location, instructor, and equipment. View the new equipment search criteria.

NOTE: Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.
21. Select Save.
22. If there are any warnings, the **Warning Details** screen displays. If this occurs, select **Yes** to continue.

23. The Schedule Offering record displays allowing you to make further configurations.

24. For use in future activities, record the system-generated **Scheduled Offering ID**, which is the numeric value located in the upper right corner of the Core area.

The Job Aid: Creating Scheduled Offerings is available in the VA TMS.
Slide 27: Scheduled Offering Record Main Areas

Notes:

Slide 28: Demonstration: Using Core, Actions, and Related Areas of a Scheduled Offering Record

Notes:
Demonstration: Using Core, Actions, and Related Areas of a Scheduled Offering Record

1. Log in to the VA TMS.
2. Verify that the Admin tab is selected.
3. Select the Learning tab.
4. Select Scheduled Offerings tab on the left-hand side of the screen.
5. Select Search.
6. Select a scheduled offering from the list of results.
7. Once the scheduled offering record is displayed, describe the three main areas of the scheduled offering record as follows:

   **Core Area, located in the upper part of the scheduled offering**
   
   You can use the Core area of the selected scheduled offering record to update the basic attributes of the record (summary information). These attributes could include, for example, the offering description, domain, facility, registration settings, and any other fields deemed required by the global system administrators or added based on your Personalized field preferences.

   Select the View All link to see additional settings for the scheduled offering, including title, description, summary, extended summary, physical schedule, and registration.

   **Actions Area, located to the right of the Core Area**

   In the Actions area, you can bookmark, copy, cancel, or delete a scheduled offering. You can also send notifications to users about scheduled offerings. If you select the View Roster link, this quickly generates the Roster/Sign-In Sheet report that shows all of the users who are enrolled for that scheduled offering.

   **Related Area, located to the left of the Core Area**

   The Related area contains additional information regarding the scheduled offering, including registration information, associated catalogs, and segment details.
Copy a Scheduled Offering

- Allows you to create duplicates
- Copies resources and registration parameters
- Can be scheduled to occur once or in recurrence

Slide 29: Copy a Scheduled Offering

Demonstration: Copying and Canceling Scheduled Offerings

Slide 30: Demonstration: Copying and Canceling Scheduled Offerings
Demonstration: Copying and Canceling Scheduled Offerings

Copying a Scheduled Offering

1. Log in to the VA TMS.
2. Select the Learning tab.
3. Select Scheduled Offerings tab on the left-hand side of the screen.
4. Search for and select a scheduled offering. **Note:** This demo can be completed with the scheduled offering that was created in the last demo.
5. Select the Copy link in the Actions area of the record.
6. Select the Copy Multiple–Monthly Based radio button.
7. Enter a new start date in the New Start Date textbox.
8. Enter “1” in the Schedule every ___ month(s) field.
9. Select the End after ___ schedules radio button.
10. Enter “3” in this field.
11. Check the Include Registration Cut-off Date checkbox.
12. Select Next.
13. On the Confirmation screen, check the Send Notification checkbox.
14. Select Copy. Note the new scheduled offering IDs and start dates.

Canceling a Scheduled Offering

1. Enter search criteria to search for and locate one of the scheduled offerings just copied.
2. Select Cancel from the Actions area of the Scheduled Offering record.
3. Select Next.
4. Admins don’t need to complete **Step 2: Edit Realized Costs** because this feature is not currently available in the VA TMS.
5. Select Inactivate the Scheduled Offering.
6. Select Next again.
7. On the Confirmation screen, select Finish.
8. On the Finished Confirmation Page, select OK.
Slide 31: Activity #2: Copy and Cancel Scheduled Offerings
Activity #2: Copy and Cancel Scheduled Offerings

Copy a Scheduled Offering

1. Log in to the VA TMS.
2. Select the Learning tab.
3. Select Scheduled Offerings tab on the left-hand side of the screen.
4. Search for and select the scheduled offering you created in Activity #1.
5. Select the Copy link in the Actions area of the record.
6. Select the Copy Multiple–Monthly Based radio button.
7. Enter a new start date in the New Start Date textbox.
8. Enter “1” in the Schedule every ___ month(s) field.
9. Select the End after ___ schedules radio button.
10. Enter “3” in this field.
11. Check the Include Registration Cut-off Date checkbox.
12. Select Next.
13. On the Confirmation screen, check the Send Notification checkbox.
14. Select Copy. Note the new scheduled offering IDs and start dates.

Cancel a Scheduled Offering

1. Enter search criteria to search for and locate one of the scheduled offerings just copied.
2. Select Cancel from the Actions area of the Scheduled Offering record.
3. Select Next.
4. Admins don’t need to complete Step 2: Edit Realized Costs because this feature is not currently available in the VA TMS.
5. Select Inactivate the Scheduled Offering.
6. Select Next again.
7. On the Confirmation screen, select Finish.
8. On the Finished Confirmation Page, select OK.
Knowledge Check

A scheduled offering is:

a) An instance of an item placed on a learning calendar
b) An assignable unit that a user must complete
c) A grouping of curricula
d) None of the above

Notes:

Slide 32: Knowledge Check

Knowledge Check

What are the main areas of a scheduled offering record?

a) Home, Learning, and Status
b) Curricula, Actions, and Records
c) Home, Items, and Related
d) Core, Actions, Related

Notes:

Slide 33: Knowledge Check
2.3 Lesson 2: Segments

Lesson 2: Segments

Slide 34: Lesson 2: Segments

Lesson 2 Objectives

Notes:

After completing this lesson, you will be able to:

- Modify segments of a scheduled offering
- Assign resources to a segment
- Record attendance for a specific segment

Slide 35: Lesson 2 Objectives
Segments

- A segment is a block of time within a scheduled offering primarily used for resource allocation
- If a user is registered in a scheduled offering, he/she is registered in all segments
- Segments contain any applicable resources, such as locations, equipment, and instructors

Slide 36: Segments

Notes:

Two Views in the Segment Section

- List view
- Calendar view

Slide 37: Two Views in the Segment Section

Notes:
Slide 38: List View

**List View**

- Lists all segments and assigned resources in text format
- The only view in which segments can be copied
- The only view in which an admin can record attendance

Notes:

Slide 39: Calendar View

**Calendar View**

- Shows segments in graphical calendar format
- Segment times and dates can be altered by dragging and resizing segment boxes
- View can be altered to reflect day, week, or monthly view
Resources Assigned to Segments

- A segment can have multiple resources of the same type, such as two instructors
- Once a resource is assigned to a segment, it is booked
- If another admin attempts to schedule the resource during the same timeframe, VA TMS will alert him/her that there is a conflict

Slide 40: Resources Assigned to Segments

Adding Resources to a Segment

You can set up scheduled offering resources in the VA TMS. Resources include:

- Instructors
- Equipment
- Materials
- Facilities
- Locations

Slide 41: Adding Resources to a Segment
Custom Resources Search Defaults

- Searches on custom resources will default to the assigned custom resource types on the Edit Segment of Scheduled Offering page.
- If custom resource is not associated with the facility or location, all records will show unless there are domain restrictions that apply.

Notes:

Slide 42: Custom Resources Search Default

Add Custom Resource

Add Segment

- *Required
- *Start Date: MM/DD/YYYY
- *Start Time: 24h AM/PM
- *End Date: MM/DD/YYYY
- *End Time: 24h AM/PM
- *Time Zone: Eastern Standard Time (America/New York)

Description:

Resources:

Type & Title:
- Add Location
- Add Instructor
- Add Equipment

Primary Remove

Add Custom Resource

Notes:

Slide 43: Add Custom Resource
Record Attendance

- Select the Attendance link next to any segment displayed in List view.

Notes:
1. Select Attendance checkbox to record attendance.
2. Enter comments, if desired.
3. Select Apply Changes.
4. For multiple segments, select Copy to Same Day Segments.

Slide 44: Record Attendance

Slide 45: Record Attendance (cont’d)
Demonstration: Segments

Slide 46: Demonstration: Segments
Demonstration: Segments

1. Log in to the VA TMS.
2. Select the Learning tab.
3. Select Scheduled Offerings tab on the left-hand side of the screen.
4. Search for and select a scheduled offering you created previously.
5. Now that the scheduled offering record is displayed, let’s discuss the Segment areas.

Assigning Instructors

Once the instructor is identified, he or she can be assigned to the segment(s) within a scheduled offering. To do that, select Segments, select Add New Segments, and then select Add Instructor from the drop-down menu. The VA TMS returns all instructors in the search results. The search results include a column that displays the resource availability, which can help when determining the segment resource allocation:

- Not Available
- Available for entire scheduled offering
- Available for current segment
- Blank (when segment information is not available)

NOTE: The search for authorized instructors is an option per Item—so it’s not necessary to clear out the item information from the filter if you want to search for an instructor who is not specifically authorized to teach this item. To perform “search and select” search filters, select the Search tab, enter your search criteria, then select Search.

Assigning Locations

When the training location has been identified, you can assign it to the segment(s) within a scheduled offering. To assign locations to segments, select Add New Segments, Add Resources then Add Location from the drop-down menu. The VA TMS returns all locations in the search results.

Assigning Equipment

Equipment is any reusable resource that is used in the delivery of scheduled offerings. These include overhead projectors, television monitors, classroom laptops, etc. Equipment can be associated with locations and facilities. You may schedule equipment that does not come with the location that has been scheduled. To schedule these additional resources, select the Add Resources button for the segment in which you want to schedule them.

Resource Conflicts

If you select a resource that is already scheduled for the same time in which you are trying to schedule it, a warning message displays. You can view the conflict and make a decision to
continue and schedule that resource or search for and select another. **Note:** You may need to “force” a conflict to show users how this feature works.

**Apply to All Segments**

In **Edit Segment**, you can add all of the resources that will be needed to deliver the segment. You can also select **Apply to All Segments** to copy the resources that you have applied to the segment that you’re modifying to all other segments of the scheduled offering. Then select **Save & Close**.

**Additional Segments**

Once a scheduled offering is created, you have the ability to add or remove segments from that scheduled offering. The default segment structure is established through the Segments tab of the item record. You can add a new segment to the scheduled offering by either selecting the **Add New Segments** button or by selecting the **Copy Segments** icon. The Copy Segments icon is only available in list view.
Slide 47: Activity #3: Segments
Activity #3: Segments

Assigning Resources to Segments

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1.
3. Select Search.
4. Select the scheduled offering ID link to access the scheduled offering in edit mode.

   **Note:** If you haven’t navigated away from the scheduled offering from the previous activity, you do not need to search for it. If you have, you can also access the scheduled offering record from your Recents panel.

5. Select the Segments tab from the Related area.
6. In list view, select the segment link.
7. For the selected segment, select a primary instructor.
8. Select Add Resources.
9. Select Add Instructor.
10. Select the corresponding checkbox to select the instructor to add for the segment.
11. Select Add.
12. Identify the primary instructor and select the corresponding radio button in the Primary column.
13. Select Save. **NOTE:** When adding an instructor, the VA TMS returns only instructors who are authorized to teach this item.
14. Select a primary location.
15. Select Save and Close. **NOTE:** If there are multiple segments and one or more of the segments do not have a primary instructor and/or location designated, the system displays a warning pop-up box. Select OK to continue.

Adding a Second Instructor to a Segment

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1 and select Search.
3. Select the scheduled offering ID link to access the scheduled offering in edit mode.
4. Select the Segments tab from the Related area.
5. In calendar view, select the segment you want to add a second instructor.
6. Select Add Resources and select Add Instructor from the drop-down menu.
7. Select the corresponding checkbox to select the second instructor to add for the segment.
8. Select Add.
9. Identify the primary instructor and select the corresponding radio button in the Primary column.
10. Select Save.
11. View all the instructors scheduled to teach during the segment. Note the primary instructor.
12. Select Cancel to return to the calendar or list view. **NOTE:** If you did not select Save, in step 12, select Save and Close to save your changes and return to the segment calendar or list view.

**Adding Segments to a Scheduled Offering**

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1.
3. Select Search.
4. Select the scheduled offering ID link to access the scheduled offering in edit mode.
5. Select the Segments tab from the Related area.
6. Select the Add New Segments button.
7. Enter the segment information:
   - Start date and time
   - End date and time
   - Segment description (optional but recommended)

**Copy Daily Segments**

1. Navigate to the segment you just created.
2. Select the List View icon.
3. Next to the segment just created, select the Copy Segments icon.
4. Enter the number of times to copy the segment. **NOTE:** The system is actually copying all segments scheduled on the same date of the segment you selected, not just the segment you selected. This will create each duplicate segment(s) on a different day. You can modify the new segment dates, times, and time zones once they are created.
5. Select Copy.
6. View the new segment(s). **NOTE:** The resources assigned to the original segment are carried over to the new segment(s).
7. Modify the description for each new segment.
8. Select Save and Close.
9. Change the end time of one of the new segments.
10. Select **Save and Close**.

The Job Aid: Creating Scheduled Offerings is available in the VA TMS.
Knowledge Check

What are the two different ways you can view segments?

a) Limited view and Extended view
b) Short view and Detailed view
c) List view and Calendar view
d) Resource view and Schedule view

Slide 48: Knowledge Check

Knowledge Check

List three types of resources that can be assigned to a segment.

Slide 49: Knowledge Check
2.4 Lesson 3: Registration

Lesson 3: Registration

After completing this lesson, you will be able to:

• Define the four registration statuses
• Register users for a scheduled offering
• Control supervisors’ rights to enroll users
• Reserve slots for a scheduled offering
• Use the Registration Assistant tool

Slide 51: Lesson 3 Objectives
How Users Register

- Self-Register
- Supervisor registers
- Admin registers

Registration Statuses

- Enrolled
  - The user has a seat in the scheduled offering
- Waitlisted
  - The user is waiting for a seat to open
- Cancelled
  - The user does not have a seat
- Pending
  - The user is “pending” approval in the VA TMS
Demonstration:
Registration

Slide 54: Demonstration: Registration
Demonstration: Registration

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for the scheduled offering you’ve been using throughout the session (Use “Exact” and the Scheduled Offering ID, or just use Recents or Bookmarks).
3. Select the **Registration** section of the Related area.
4. Select the **Add Users** button and choose **Add Users**.
5. Enter search criteria to search for users; User ID contains “Train.”
6. Select **Search**.
7. Select the **Add** checkbox next to the user you want to register.
8. Select **Add**.
9. Confirm that the user has been added by verifying the user’s name has been added in the Enrolled section.

The Job Aid: Registration Management is available in the VA TMS.
Activity #4: Registration

System Practice

Slide 55: Activity #4: Registration
Activity #4: Registration

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for the scheduled offering you’ve been using throughout the session (Use “Exact” and the Scheduled Offering ID, or just use Recents or Bookmarks).
3. Select the Registration section of the Related area.
4. Select the Add Users button and choose Add Users.
5. Enter search criteria to search for users; User ID contains “Train.”
7. Select the Add checkbox next to the user you want to register.
8. Select Add.
9. Confirm that the user has been added by verifying the user’s name has been added in the Enrolled section.

The Job Aid: Registration Management is available in the VA TMS.
Control Supervisors’ Rights to Enroll Users

- Previously, a single setting called "User Self Registration" on the Item and Scheduled Offering record controlled users’ rights to register.
- A similar setting has been added for supervisors in the Item Record summary information section.
- If Supervisor Registration is set to Yes, then the supervisor can register users for training. If set to No, then the supervisor cannot register users.
- This feature defaults to Yes on all new items.

Notes:

Slide 56: Control Supervisors’ Rights to Enroll Users

Demonstration: Controlling Supervisors’ Rights to Enroll Users

Notes:

Slide 57: Demonstration: Controlling Supervisors’ Rights to Enroll Users
Demonstration: Controlling Supervisors’ Rights to Enroll Users

From the admin home page:

1. Select Learning.
2. Select Scheduled Offerings.
3. Enter search criteria to search for the scheduled offering you’ve been using throughout the session (Use “Exact” and the Scheduled Offering ID, or just use Recents or Bookmarks).
4. Select View All in the Core area of the record.
5. Scroll down to the Supervisor Registration field and select Yes from the drop-down list.
6. Scroll down to the Self Registration field and select Yes from the drop-down list.
7. Select Save.
**Slots**

- Slots allow you to reserve seats in a scheduled offering without having to register specific users.
- As slots are reserved, the number of open seats decreases by that number.

---

**Demonstration: Slots**

Slide 58: Slots

Slide 59: Demonstration: Slots
Demonstration: Slots

NOTE: If short on time, you can demo slots with the previous Registration demonstration.

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for the scheduled offering created (Use “Exact” and the Scheduled Offering ID you created, or just use Recents or Bookmarks).
3. Select the Registration section of the Related area.
4. Select Add Slots from the drop-down menu.
5. In the Add Slots window, select the Organization ID and the number of slots. Then select Save.
6. Once slots are reserved, the number of open seats decreases by that number. For example, if there are 15 seats available in the class and the admin reserves three slots, 12 seats remain available for other users.
Activity #5: Slots

System Practice

Slide 60: Activity #5: Slots
Activity #5: Slots

Reserving Slots for a Scheduled Offering:

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for and locate the scheduled offering created in Activity #1.
3. Select Search.
4. Select the scheduled offering ID link to access the record in edit mode.
5. Select the Registration tab from the Related area.
6. Select Add to Registration menu (green plus sign next to Add Users).
7. Select Add Slots from the drop-down menu.
8. Select an organization for which to reserve the slots.
9. Enter the number of slots to be reserved for the organization.
10. Enter the reservations date (defaults to current date).
11. Enter the reservation time (defaults to current time).
12. Select Save.
Registration Assistant

The Registration Assistant is a tool that helps streamline the process of registering users from the admin side of the VA TMS.

Slide 61: Registration Assistant

Demonstration: Registration Assistant

Slide 62: Demonstration: Registration Assistant
Demonstration: Registration Assistant

1. Navigate to Learning > Tools > Registration Assistant to access the tool.
2. Select Register Users.
3. Select Next.
4. Select the magnifying glass for Scheduled Offering.
5. Enter search criteria for the scheduled offering.
7. Select the scheduled offering.
8. Select Next.
9. Select add one or more from list.
10. Enter search criteria for the user(s) you want to register.
11. Select Search.
12. Select the Add checkbox for the user(s) you want to register.
13. Select Add.
14. Select Next.
15. Add comments, if required.
16. Select Next.
17. Select Next. (Admins don’t add any financial data at this time.)

The Job Aid: Registration Assistant Tool is available in the VA TMS.
Knowledge Check

All of the user registration options on a scheduled offering are determined within the Registration tab.

a) True
b) False

Notes:

Slide 63: Knowledge Check

Knowledge Check

What are the four registration statuses in the VA TMS?

Notes:

Slide 64: Knowledge Check
Knowledge Check

Slots allow you to reserve seats in a scheduled offering without having to register specific users.

a) True
b) False
2.5 Lesson 4: Record Learning Events

Lesson 4: Record Learning Events

Slide 66: Lesson 4: Record Learning Events

Notes:

Lesson 4 Objectives
After completing this lesson, you will be able to:

- Define a learning event
- Record a learning event for a scheduled offering

Slide 67: Lesson 4 Objectives

Notes:
Learning Events
A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of attendance or completion of any external event considered important enough to document (but not related directly to learning needs)

Slide 68: Learning Events

Record Scheduled Offering Before End Date
- Admins may record learning for a scheduled offering before the offering end date.
- They may not record learning before the offering start date.
- They will navigate to:
  
  Users > Tools > Record Learning-Multiple

Slide 69: Record Scheduled Offering Before End Date
Types of Learning Events

Learning events can be:

- Item-based events
- External events

Slide 70: Types of Learning Events

Data Recorded in Learning Event

A learning event captures data such as:

- User information
- Item title
- Item status (grade or code)
- Completion date/time
- Completion status code

Slide 71: Data Recorded in Learning Event
Demonstration: Recording a Learning Event

Slide 72: Demonstration: Recording a Learning Event
Demonstration: Recording a Learning Event

1. From the Quick Links section of the Admin home page, select Record Learning – Multiple.

2. You can also access the Record Learning – Multiple tool by navigating to Users > Tools > Record Learning – Multiple.

3. The Record Learning – Multiple tool can record learning events for multiple items for multiple users as long as the events that you want to record are the same type (for example, all items or all scheduled offerings).
Slide 73: Activity #6: Record a Learning Event
Activity #6: Record Learning

1. Navigate to Users > Tools > Record Learning – Multiple.
2. Select the Scheduled Offering radio button.
3. Select the Scheduled Offering ID select icon to search for and select a scheduled offering.
4. Select Add. The scheduled offering displays.
5. Search and add users by selecting the User ID icon and select Add or select Auto Fill from Registration to populate the user list from registered users. The list of users appears.
6. Select Next.
7. Select expand next to the scheduled offering to view all user records.
8. Enter Completion Status, and Hours next to the scheduled offering title.
9. Select Apply Changes to apply to all user records.
10. Make changes as necessary to individual user records.
11. Select Next.
12. Review the summary of the learning history to be recorded by the system.
13. Select Submit.
Record Learning Events from Scheduled Offering Page

- Admins can now record a learning event from the scheduled offering page.
- The wizard populates the scheduled offering details and the enrolled users.
- To use this feature, administrators must have the required role to record learning events.

Notes:

Slide 74: Record Learning Events from Scheduled Offering Page

Demonstration: Recording a Learning Event from Scheduled Offering Page

Notes:

Slide 75: Demonstration: Recording a Learning Event from Scheduled Offering Page
Demonstration: Recording a Learning Event from Scheduled Offering Page

From the admin home page:

1. Select **Learning**.
2. Select **Scheduled Offering**.
3. Enter search criteria for the scheduled offering.
4. Select **Search**.
5. Select the scheduled offering from the search results.
6. In the **Actions** area of the Scheduled Offering record, select **Record Learning**.
7. Select **Users** for whom you want to record learning.
8. Select **Next**.
9. Enter **Comments** and **Status** of the learning event for each user. **Note:** VA TMS does not recognize grades so leave this field blank.
10. Select **Next**.
11. Select **Next. Note:** The VA TMS does not recognize costs so leave this page blank.
12. Select Finish.
Slide 76: Activity #7: Record a Learning Event from Scheduled Offering Page
Activity #7: Record a Learning Event from Scheduled Offering Page

From the admin home page:

1. Select **Learning**.
2. Select **Scheduled Offering**.
3. Enter search criteria for the scheduled offering.
4. Select **Search**.
5. Select the scheduled offering from the search results.
6. In the **Actions** area of the Scheduled Offering record, select **Record Learning**.
7. Select **Users** for whom you want to record learning.
8. Select **Next**.
9. Enter **Comments** and **Status** of the learning event for each user. **Note:** VA TMS does not recognize grades so leave this field blank.
10. Select **Next**.
11. Select **Next**. **Note:** The VA TMS does not recognize costs so leave this page blank.
12. Select Finish.
Knowledge Check

What data can be recorded in a learning event?

a) Completion date and status
b) User information
c) Item information
d) All of the above

Slide 77: Knowledge Check

Knowledge Check

Admins can record learning events for users who were not registered in the scheduled offering originally.

a) True
b) False

Slide 78: Knowledge Check
Related Reports

The following are reports in VA TMS that relate to scheduled offerings:

- Scheduled Offering Roster (Print from Scheduled Offering Record)
- Scheduled Offering Data
- Learning Calendar
- Registration Status

Slide 79: Related Reports

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 80: Evaluation & Self Certification Reminder
Slide 81: Questions?
### 3.0 Terminology

<table>
<thead>
<tr>
<th>Scheduled Offering</th>
<th>An item that has been scheduled and placed on the training calendar with a start date and start time. It is made available to users via catalogs. It can’t be in a catalog that the item is not in.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule Block</td>
<td>A schedule block prevents resources from being scheduled into another offering during a given time.</td>
</tr>
<tr>
<td>Segment</td>
<td>A unit of time within a scheduled offering. A scheduled offering must have at least one segment, but can have multiple segments. Segments are used primarily for resource management.</td>
</tr>
<tr>
<td>Class</td>
<td>A group of users who are tracked as a group and perhaps complete a series of scheduled training requirements.</td>
</tr>
<tr>
<td>Group Instance</td>
<td>A method to group scheduled offerings for reports.</td>
</tr>
<tr>
<td>Resources</td>
<td>Assets that are assigned and reserved to a segment within a scheduled offering: Instructor, Facility, Location, Equipment, Materials</td>
</tr>
</tbody>
</table>