Period-Based Curricula (Advanced Topic)

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

May 2015
Table of Contents

1.0 About This Training .................................................................................................................. 3
  1.1 Training Purpose .................................................................................................................... 3
  1.2 Target Audience .................................................................................................................... 3
  1.3 Training Length ..................................................................................................................... 3
  1.4 Participant Guide .................................................................................................................. 3
    1.4.1 Participant Guide Icons ................................................................................................. 4
  1.5 Participant Preparation and Guidelines .................................................................................. 4
    1.5.1 Requirements .................................................................................................................. 4
    1.5.2 Demonstrations and System Practice Activities in VA TMS .......................................... 4
    1.5.3 Virtual Instructor-Led Training Guidelines ................................................................... 4
  1.6 VA TMS Administrators Role-Based Training Sessions and Target Audiences ............... 5
  1.7 VA TMS Functions and Associated Roles ............................................................................. 6

2.0 Training Content ....................................................................................................................... 7
  2.1 Welcome ............................................................................................................................... 7
  2.2 Lesson 1: Period-Based Curriculum Overview ................................................................. 10
  2.3 Lesson 2: Determining Required-By Dates ......................................................................... 14
  2.4 Lesson 3: Setting Required Dates within an Item .............................................................. 18
  2.5 Lesson 4: Required Dates Editor and Learning Event Synchronization ........................... 24
1.0 About This Training

1.1 Training Purpose
The purpose of the Period-Based Curricula is to provide detailed information about initial and retraining assignments within a curriculum and how to work with them in the VA TMS.

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

1.3 Training Length
This training will run for approximately 3.5 hours. Brief breaks will be given.

1.4 Participant Guide
This Participant Guide contains all key content presented in this training, including PowerPoint slides with room for taking notes, activities, and demonstrations for each lesson.

The Participant Guide is divided into two sections:

- About This Training
- Training Content

**NOTE:** Print a hardcopy of this Participant Guide to use during training. You will need to reference the steps for all demonstrations and activities in this guide while completing steps in the VA TMS.
1.4.1 Participant Guide Icons

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></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" /></td>
<td>This icon indicates that participants will complete an activity.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>This icon indicates that there is a job aid available for the task.</td>
</tr>
</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>
</tr>
</thead>
</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.

<table>
<thead>
<tr>
<th>VA TMS Admin Function</th>
<th>LM</th>
<th>DM</th>
<th>IM</th>
<th>RM</th>
<th>SM</th>
<th>AM</th>
<th>APM</th>
<th>HD</th>
<th>PR</th>
<th>QEM</th>
<th>CM</th>
<th>CIM</th>
<th>HR</th>
<th>RPT</th>
<th>AHN</th>
<th>PM</th>
<th>COM</th>
<th>ACM</th>
<th>ACIM</th>
<th>MSE</th>
<th>MSEHD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unlock User Accounts</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reset User Passwords</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Supervisors for a group of Users</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proxy into Users accounts</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Remove Items to/from Learning Plan</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Remove Curricula Assignments</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Item/External Event/Scheduled Offerings</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit/Delete Recorded Learning Events</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merge User Records</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Edit Items</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Edit Curricula</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send Notifications</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Edit Scheduled Offerings</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Register Users into a Scheduled Offering</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit User's Registration in Scheduled Offering</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign/Remove Competency Profiles to/from Users</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign/Remove Competences to/from Users</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Administrator Accounts</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Edit/Copy/Delete Assignment Profiles</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit User Preferred Accreditations</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit User Occupational Categories</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Edit/Competencies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Remove Competencies from Items</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Edit/Delete Competency Profiles</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter/Delete Competency Assessments for Users</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Edit/Delete Questions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Edit/Delete Exam Objects</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign/Remove Questions to/from Exam Objects</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add Questionnaire/Surveys</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unassign a Survey from Users</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit Organization Dashboard Ownership</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Edit Accreditations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apply Accreditations to Items</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View sensitive information on Users Records</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create and Manage Communities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run various Standard and Custom Reports</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Self Enrolled User</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Validate Self Enrolled User</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bookmark Available Entities</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Download Search Results</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2.0 Training Content

2.1 Welcome

Notes:

Slide 1: Session Preparation

Notes:

Slide 2: VA TMS Administrators Role-Based Training: Period-Based Curricula (Advanced Topic)
**Session Agenda**

- Welcome and Introductions
- Lesson 1: Period-Based Curriculum Overview
- Lesson 2: Determining Required-By Dates
- Lesson 3: Setting Required Dates within an Item
- Lesson 4: Required Dates Editor and Learning Event Synchronization
- Question and Answer

Slide 3: Session Agenda

**Session Objectives**

After completing this session, you will be able to:

- Determine initial and retraining dates
- Set required dates within an item
- Use the Required Dates Editor

Slide 4: Session Objectives
Introductions

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

Slide 5: Introductions
2.2 Lesson 1: Period-Based Curriculum Overview

Slide 6: Lesson 1: Period-Based Curriculum Overview

Notes:

Slide 7: Period-Based Curricula

Notes:

**Period-Based Curricula**

- How much initial completion time should be granted to the user?
- Does an item within a curriculum have a firm required-by date for all users regardless of when it is assigned?
- Do the items within the curriculum require retraining?
### Slide 8: Retraining

**Retraining**

- Items that must be repeated on recurring intervals will have a Retraining assignment
- Once the item is complete and recorded, it is flagged as complete
- The next Required-By date will be calculated by the Retraining assignment

### Slide 9: Item Settings

**Item Settings**

Each item in a curriculum has the following settings:

- Initial Assignment
- Retraining Assignment
- Basis Date
- Effective Date
- Assignment Type
Effective Date

- A user must complete a required item before the effective date to avoid a curriculum status of Incomplete.
- If an effective date is in the future, it will not impact the overall completion status of the curriculum.
- Effective dates only impact Incomplete and Complete curricula status and do not change required dates.

Assignment Type

The assignment type is a status assigned to an item that indicates the level of importance to the user, such as:

- Required
- Optional
- Recommended

A user must complete all required items to obtain a Complete curriculum status.
Event vs. Calendar Basis

Admins have two options available when setting initial and retraining assignments:

- Event Basis: Hire date or assignment date only
- Calendar Basis: A particular date on the calendar

Note: You will see Calendar Basis on your screen, but the VA does not use Calendar Basis requirements.

Slide 12: Event vs. Calendar Basis

Event Basis

Using event basis, the VA TMS calculates the required date by completing the current period and then adding the initial/retraining assignment.

Triggers for required date calculation to begin:

- Assignment Date (initial assignment)
- Learning History completion date (retraining basis event)

Slide 13: Event Basis
2.3 Lesson 2: Determining Required-By Dates

Lesson 2: Determining Required-By Dates

Slide 14: Lesson 2: Determining Required-By Dates

Notes:

Period Start Date
Always remember:

- The system has to complete the current period (day, month, year, quarter) before it can begin counting a new one

Slide 15: Period Start Date
### Required Dates Practice

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Date Period</th>
<th>Number</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/15/2013</td>
<td>Years</td>
<td>1</td>
<td>12/31/2014</td>
</tr>
<tr>
<td>03/15/2013</td>
<td>Days</td>
<td>365</td>
<td>03/15/2013</td>
</tr>
<tr>
<td>03/15/2013</td>
<td>Months</td>
<td>6</td>
<td>09/30/2013</td>
</tr>
<tr>
<td>03/15/2013</td>
<td>Days</td>
<td>183</td>
<td>09/15/2013</td>
</tr>
<tr>
<td>03/15/2013</td>
<td>Quarters</td>
<td>1</td>
<td>06/30/2013</td>
</tr>
<tr>
<td>03/15/2013</td>
<td>Months</td>
<td>3</td>
<td>06/30/2013</td>
</tr>
<tr>
<td>03/15/2013</td>
<td>Days</td>
<td>90</td>
<td>06/15/2013</td>
</tr>
</tbody>
</table>

Slide 16: Required Dates Practice

### Event Basis Example

1 Month vs 30 Days

- **1 month**
  - Date is calculated as one month from the end of the initial period (7/31/13).
  - August 31, 2013

- **30 days**
  - Date is calculated as thirty 30 days from the assignment date.
  - July 31, 2013

Assignment Date: July 1, 2013
Completion Required Date

Slide 17: Event Basis Example
Slide 18: Event Basis Example

1 year vs 365 days

- **Assignment Date:** July 1, 2013
- **Completion Required Date:** December 31, 2014

Slide 19: Knowledge Check

- **Initial Basis:** Event
- **Period:** Months
- **Number:** 5

- **Assignment Date:** January 24, 2013
- **5 months**
Knowledge Check

- Initial Basis: Event
- Period: Days
- Number: 365

Slide 20: Knowledge Check

Knowledge Check

- Initial Basis: Event
- Period: Year
- Number: 1

Slide 21: Knowledge Check
2.4 Lesson 3: Setting Required Dates within an Item

Slide 22: Lesson 3: Setting Required Dates within an Item

Notes:

Lesson 3:
Setting Required Dates within an Item

Note:

Set Required Dates for Initial and Retraining

Remember CCEE:

C Curriculum - navigate to the Curriculum record
C Contents - select Contents from the Related area
E Edit - select the Edit button
E Edit - select the Edit link for the Item you want to set Required Dates for

Slide 23: Setting and Editing Initial and Retraining Dates
Demonstration: Setting Required-By Dates in a Curriculum

Slide 24: Demonstration: Setting Required-By Dates in a Curriculum
Demonstration: Setting Required-By Dates in a Curriculum

For this demonstration, you will find a curriculum, copy it to make it your own, and set dates.

1. Navigate to Learning > Curricula.
2. Search for and select a curriculum.
3. Select Contents from the Related area of the record.
4. Select the Edit button (do not select the item title; this will navigate you to the item entity).
5. Locate the item to modify and select the Edit link.
6. In the Initial Assignments section, enter an initial number.
7. Select days as initial period.
8. Select event as initial basis.
9. In the Retraining Assignments section, enter a retraining number.
10. Select days as the retraining period.
Slide 25: System Login

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

Slide 26: Activity #1: Setting Required-By Dates within a Curriculum
Activity #1: Setting Required-By Dates within a Curriculum

1. Navigate to Learning > Curricula.
2. Search for and select a curriculum.
3. Select Contents from the Related area of the record.
4. Select the Edit button (do not select the item title; this will navigate you to the item entity).
5. Locate the item to modify and select the Edit link.
6. In the Initial Assignments section, enter an initial number.
7. Select days as initial period.
8. Select event as initial basis.
9. In the Retraining Assignments section, enter a retraining number.
   10. Select days as the retraining period.
Knowledge Check

What does the effective date of an item within a curriculum impact?

a) Required-By date
b) Curriculum status
c) Both A & B
d) None of the above

Slide 27: Knowledge Check

Knowledge Check

The system always calculates Required Dates in days.

a) True
b) False

Slide 28: Knowledge Check
Lesson 4:
Required Dates Editor and Learning Event Synchronization

Slide 29: Lesson 4: Required Dates Editor and Learning Event Synchronization

Notes:

Required Dates Editor

Admins can change required dates directly on a user’s To-Do List. This is used when:

- A scheduled offering is not available until a later date
- The scheduled offering has been cancelled owing to lack of resources (classrooms, instructors, etc.), making the user unable to meet the required date

Slide 30: Required Dates Editor
Slide 31: Demonstration: Required Dates Editor
Demonstration: Required Dates Editor

Admins use the Required Dates Editor to update required dates using the same method as assignment. For example, if an admin assigned Item A via curriculum 1, then he/she must update the required date by specifying Item A in curriculum 1 in the Required Dates Editor. Likewise, if an admin assigned an Advanced Project Management item directly to a user’s To-Do List, then he/she must specify the item in the Required Dates Editor.

1. Navigate to Learning > Tools > Required Dates Editor.
2. Select the add one or more from list link to add users.
3. Enter search criteria to search for users.
4. Select Search.
5. Check the Add checkboxes next to each user who needs a required date change.
6. Select Add.
7. Select Next.
8. Select the add one or more from list link to search for curricula to add.
9. Enter search criteria.
10. Select Search.
11. Check Add next to each curriculum to add.
12. Select Add.
13. Select Next.
14. Select Next.
15. Enter a new required date for each item listed.
16. Select Finish to finalize the Required Dates Editor.
Learning Event Synchronization
This process:
- Verifies the learning events of users
- Recalculates required dates
- Overrides all manually updated required dates, including those updated with the Required Dates Editor
- Resets them to calculated dates based on the item assignment

Slide 32: Learning Events Synchronization

Knowledge Check
Where is the Required Dates Editor located in the VA TMS? What is the path?

a) Tools > Required Dates Editor
b) User > Tools > Required Dates Editor
c) Learning > Tools > Required Dates Editor

Slide 33: Knowledge Check
Evaluation & Self-Certification Reminder

- You will be prompted to complete the Evaluation and then you can complete your Self-Certification for this session.
- Evaluations can be found on your To-Do List.

Slide 34: Evaluation & Self-Certification Reminder

Questions?

Slide 35: Questions?