

Job Aid: Assign Learning via Basic Methods

Purpose

The purpose of the Assign Learning via Basic Methods job aid is to guide you through the step-by-step process of assigning items and curricula to users.

In this Job Aid, you will learn how to:

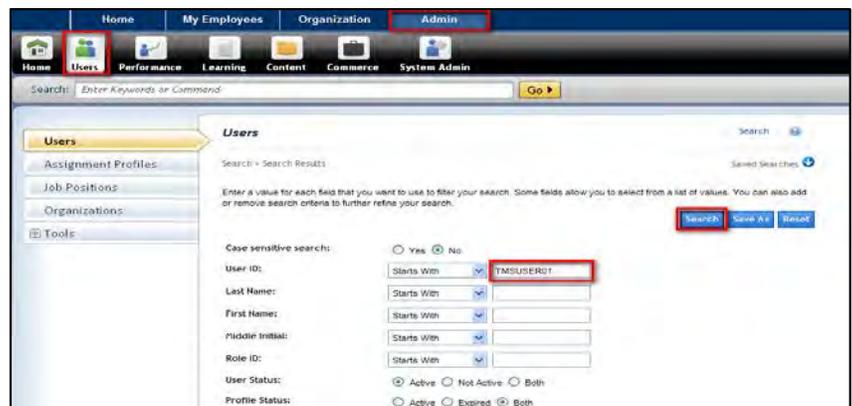
- Assign Items Directly
- Assign Items Directly to User Record
- Assign Curriculum Directly to User Record
- Assign Items to Users Via User Needs Management Tool
- Assign Curricula to Users Via User Needs Management Tool



Task A. Assign Items Directly to User Record

Note: Verify that the **Admin** tab is selected.

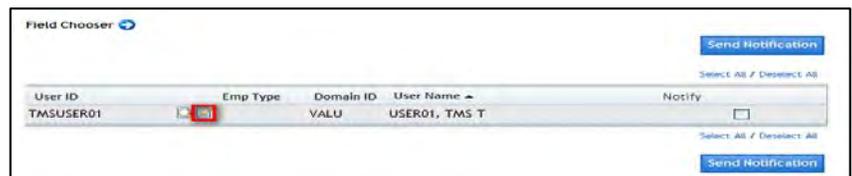
1. Navigate to **Users > Users**.
2. Enter criteria to find the user record.
3. Click the **Search** button.



The screenshot shows the TMS Admin interface. The 'Admin' tab is selected in the top navigation bar. The 'Users' menu is expanded, and the 'Users' sub-menu is selected. The search criteria are as follows:

- Case sensitive search: Yes No
- User ID: Starts With
- Last Name: Starts With
- First Name: Starts With
- Middle Initial: Starts With
- Role ID: Starts With
- User Status: Active Not Active Both
- Profile Status: Active Expired Both

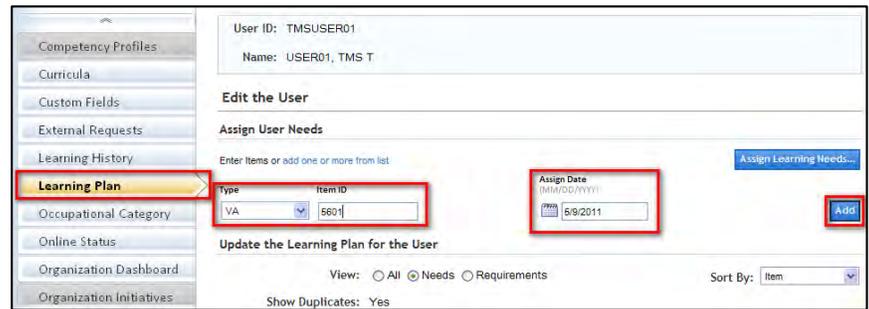
4. In the search results list, click the **Edit** icon to select the user record.



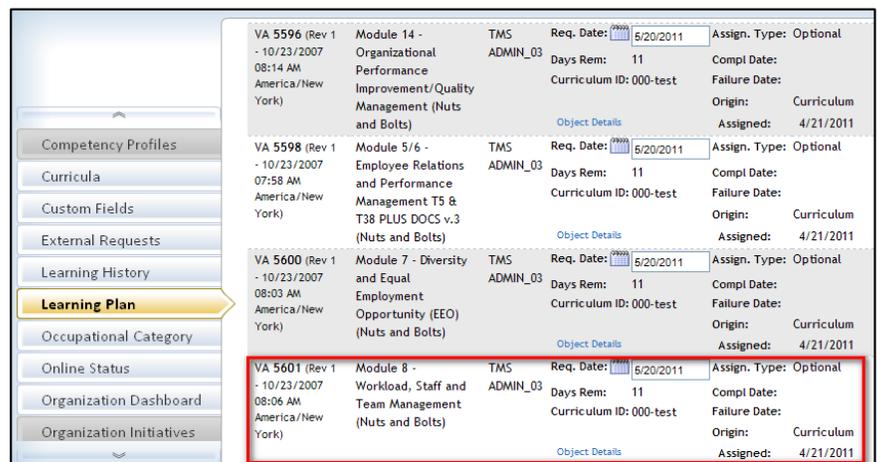
The screenshot shows the search results list. The user record for TMSUSER01 is highlighted. The 'Edit' icon is visible next to the user record.

User ID	Emp Type	Domain ID	User Name	Notify
TMSUSER01		VALU	USER01, TMS T	<input type="checkbox"/>

5. Select the **Learning Plan** tab. To add items, select the item type from the **Type** drop-down menu.
7. Enter the exact **item ID**.
8. The **Assign Date** field pre-fills with the current date by default. You may enter another date; future dates are not accepted.
9. Click **Add** or click the **add one or more from the list** link to search for items.



10. On the **Learning Plan** tab, view the user's learning plan to verify the item was added.



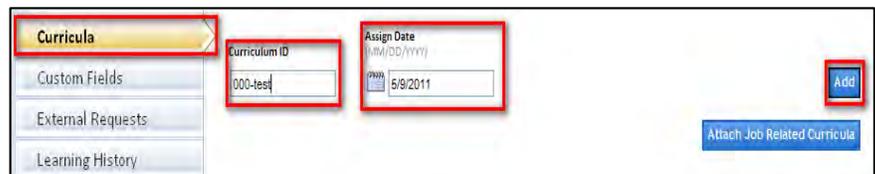
Item ID	Module	Organization	Req. Date	Days Rem	Assign. Type
VA 5596 (Rev 1 - 10/23/2007 08:14 AM America/New York)	Module 14 - Organizational Performance Improvement/Quality Management (Nuts and Bolts)	TMS ADMIN_03	5/20/2011	11	Optional
VA 5598 (Rev 1 - 10/23/2007 07:58 AM America/New York)	Module 5/6 - Employee Relations and Performance Management TS & T38 PLUS DOCS v.3 (Nuts and Bolts)	TMS ADMIN_03	5/20/2011	11	Optional
VA 5600 (Rev 1 - 10/23/2007 08:03 AM America/New York)	Module 7 - Diversity and Equal Employment Opportunity (EEO) (Nuts and Bolts)	TMS ADMIN_03	5/20/2011	11	Optional
VA 5601 (Rev 1 - 10/23/2007 08:06 AM America/New York)	Module 8 - Workload, Staff and Team Management (Nuts and Bolts)	TMS ADMIN_03	5/20/2011	11	Optional



Task B. Assign Curriculum Directly to User Record

Note: Verify that the **Admin** tab is selected.

1. Complete Steps 1-4 in **Task A** above.
2. Select the **Curricula** tab.
3. To add a curriculum, enter the exact **Curriculum ID**.
4. The **Assign Date** field pre-fills with the current date by default. You may enter another date; future dates are not accepted.
5. Click **Add** or click the **add one or more from list** link to search for curricula.



- On the **Curricula** tab, view the assignments to verify the curriculum was added.

Curriculum ID	Title	Status	Expiration Date	Next Action Date	Assign Date (MM/DD/YYYY)	Add User	Remove
000-test	Nuts and Bolts Modules (New Supervisor Training)	Complete	Does not apply	Does not apply	5/9/2011	Admin ADMIN_03, TMS	<input type="checkbox"/>

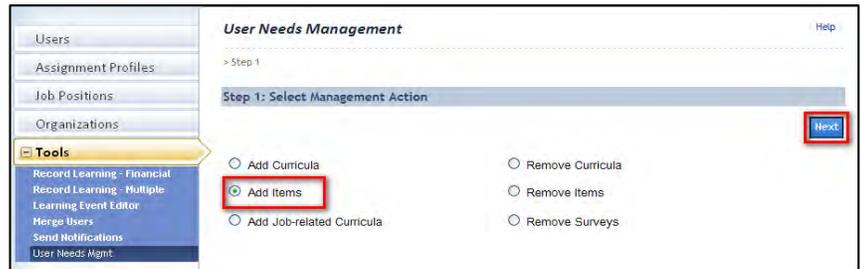


Task C. Assign Items to Users Via User Needs Management Tool

Note: Verify that the **Admin** tab is selected.

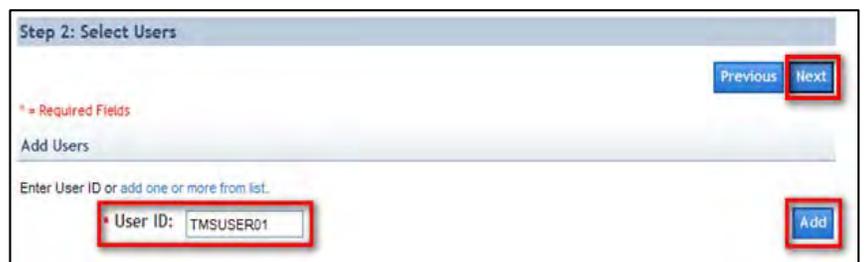
- Navigate to **Users > Tools > User Needs Mgmt.**
Step 1: Select Management Action of User Needs Management wizard displays.

- Select the action you wish to take. For this example, click the **Add items** radio button to add a course to users' learning plans.
- Click **Next**. *Step 2: Select Users* of the User Needs Management wizard displays.



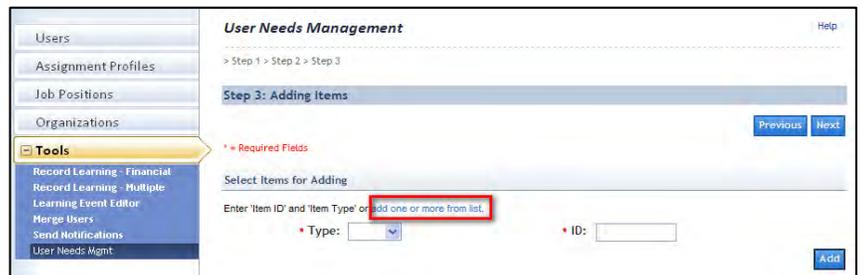
The screenshot shows the 'User Needs Management' wizard at Step 1: 'Select Management Action'. A left-hand navigation menu includes 'Users', 'Assignment Profiles', 'Job Positions', 'Organizations', and 'Tools'. The 'Tools' menu is expanded, showing options like 'Record Learning - Financial', 'Record Learning - Multiple', 'Learning Event Editor', 'Merge Users', 'Send Notifications', and 'User Needs Mgmt'. In the main area, there are four radio button options: 'Add Curricula', 'Add Items' (which is selected and highlighted with a red box), 'Add Job-related Curricula', 'Remove Curricula', 'Remove Items', and 'Remove Surveys'. A 'Next' button is located in the top right corner, also highlighted with a red box.

- To add a user, enter the exact user ID in the **User ID** field.
- Click **Add** or click the **add one or more from list** link to search for and select users.
- Click **Next**. *Step 3: Adding Items* of the User Needs Management wizard displays.



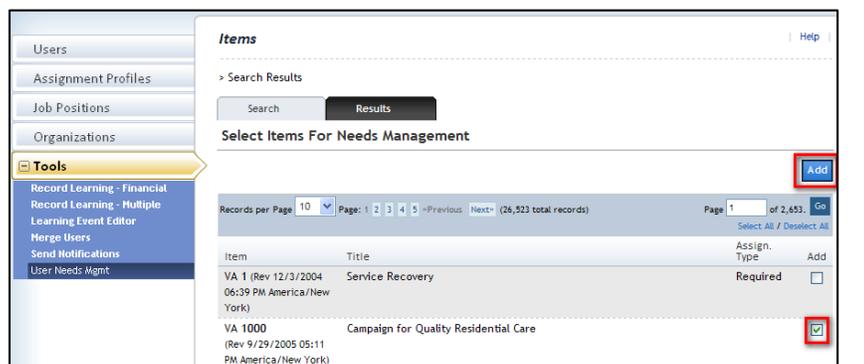
The screenshot shows Step 2: 'Select Users'. It features a 'Previous' button on the left and a 'Next' button on the right, both highlighted with red boxes. Below the navigation buttons, there is a section for 'Add Users' with a red asterisk indicating required fields. A text input field labeled 'User ID' contains the value 'TMSUSER01' and is highlighted with a red box. To the right of this field is an 'Add' button, also highlighted with a red box.

- To add items, select the item type from the **Type** drop-down menu.
- Enter the exact item ID in the **ID** field.
- Click **Add** or click the **add one or more from list** link to search for and select users.



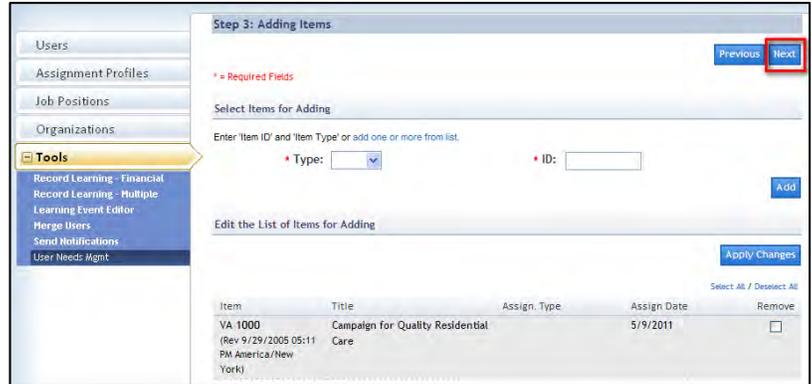
The screenshot shows Step 3: 'Adding Items'. The left-hand navigation menu is the same as in Step 1. The main area has a 'Previous' button on the left and a 'Next' button on the right, both highlighted with red boxes. Below the navigation buttons, there is a section for 'Select Items for Adding' with a red asterisk indicating required fields. A text input field contains the value 'add one or more from list' and is highlighted with a red box. To the right of this field is an 'Add' button, also highlighted with a red box.

- For this example, select any of the courses listed. One or more items can be added using the **Add** checkbox.
- Click the **Add** button.



The screenshot shows Step 4: 'Items'. The left-hand navigation menu is the same as in Step 1. The main area has a 'Search' button on the left and a 'Results' button on the right, both highlighted with red boxes. Below the navigation buttons, there is a section for 'Select Items For Needs Management' with a red asterisk indicating required fields. A table lists items with columns for 'Item', 'Title', 'Assign. Type', and 'Add'. The first item is 'VA 1 (Rev 12/3/2004 06:39 PM America/New York)' with title 'Service Recovery' and 'Required' checkbox. The second item is 'VA 1000 (Rev 9/29/2005 05:11 PM America/New York)' with title 'Campaign for Quality Residential Care' and 'Required' checkbox. The 'Add' checkbox for the second item is checked and highlighted with a red box. A 'Next' button is located in the top right corner, also highlighted with a red box.

12. Click **Next**. *Step 4: Edit Item Information* of the *User Needs Management* wizard displays.



Step 3: Adding Items

Users
Assignment Profiles
Job Positions
Organizations
Tools
Record Learning - Financial
Record Learning - Multiple
Learning Event Editor
Merge Users
Send Notifications
User Needs Mgmt

* = Required Fields

Select Items for Adding

Enter 'Item ID' and 'Item Type' or add one or more from list.

* Type: * ID:

Add

Edit the List of Items for Adding

Apply Changes

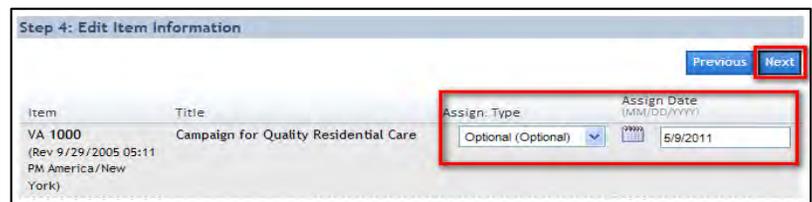
Select All / Deselect All

Item	Title	Assign. Type	Assign Date	Remove
VA 1000 (Rev 9/29/2005 05:11 PM America/New York)	Campaign for Quality Residential Care		5/9/2011	<input type="checkbox"/>

13. Select the **assignment type** from the **Assign. Type** drop-down menu.

14. The **Assign Date** field pre-fills with the current date by default. You may enter another date; future dates are not accepted.

15. Click **Next**. *Step 5: Complete User Needs Management* of the *User Needs Management* wizard displays.



Step 4: Edit Item Information

Previous Next

Item	Title	Assign. Type	Assign Date
VA 1000 (Rev 9/29/2005 05:11 PM America/New York)	Campaign for Quality Residential Care	Optional (Optional)	5/9/2011

16. Review the **User IDs** in the lists of affected users.

17. Verify the **Item** to be assigned.

18. Adjust the **Required Date** if necessary.

Note: The required date is calculated based on the item settings.

19. Click **Run Job Now** or **Schedule Job** to complete the *User Needs Management* wizard.



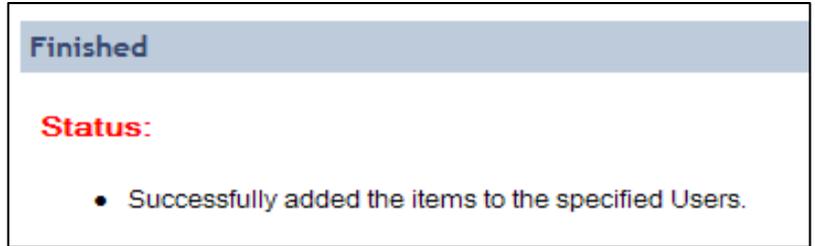
Step 5: Complete User Needs Management

Previous Run Job Now Schedule Job

User ID	Name
TMSUSER01	USER01, TMS T

Item	Title	Assign Date	Required Date
VA 1000 (Rev 9/29/2005 05:11 PM America/New York)	Campaign for Quality Residential Care	5/9/2011	12/30/2011

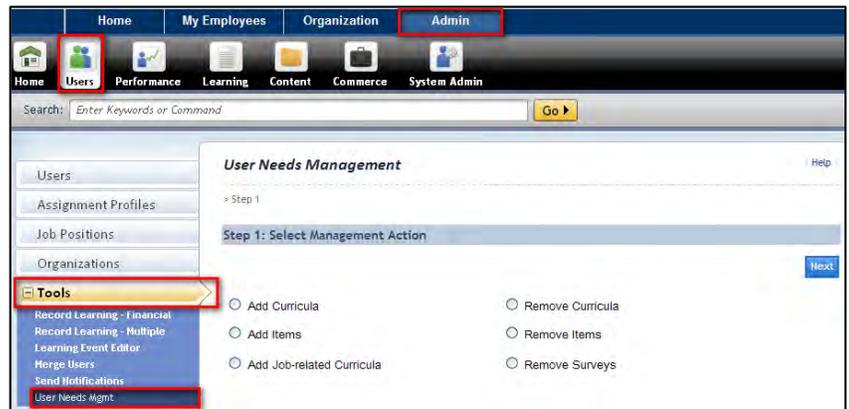
20. If you click **Run Job Now**, a Status page displays. The assignment was completed successfully.



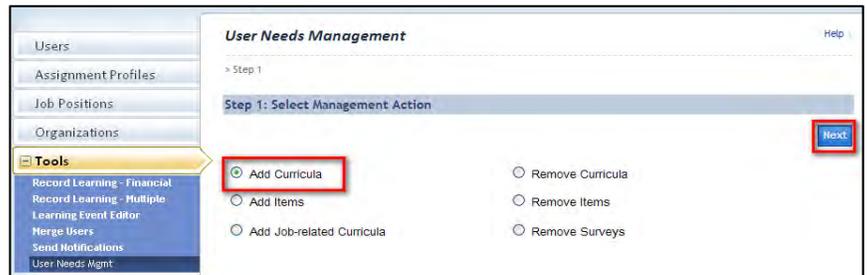

Task D. Assign Curricula to Users Via User Needs Management Tool

Note: Verify that the **Admin** tab is selected.

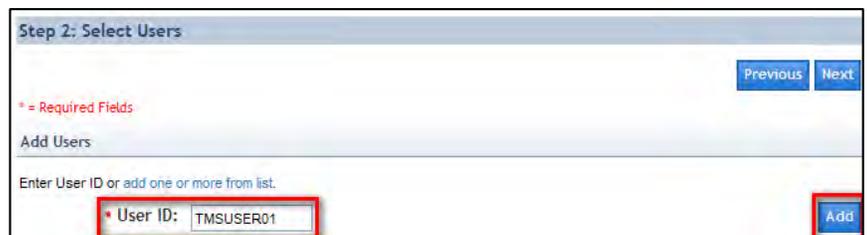
1. Navigate to **Users > Tools > User Needs Mgmt.** *Step 1: Select Management Action of User Needs Management wizard displays.*



2. Select the action you wish to take. For this example, click the **Add Curricula** radio button to add a curriculum to a group of users.
3. Click **Next**. *Step 2: Select Users of User Needs Management wizard displays.*



4. Enter the exact user ID in the **User ID** field.
5. Click **Add** or click the **add one or more from list** link to search for and select users. Now that we have a list of users, we can continue with the tool.



6. Click **Next**. *Step 3: Select Curricula for Adding* of the User Needs Management wizard displays.



Step 2: Select Users

* = Required Fields

Add Users

Enter User ID or add one or more from list.

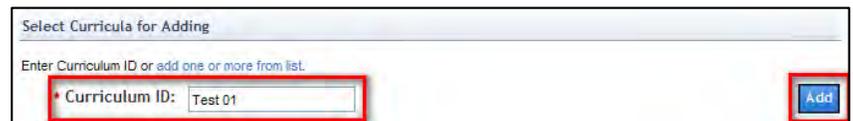
* User ID:

Add

Edit Users

7. To add a curriculum, enter the exact **Curriculum ID**.

8. Click **Add** or click the **add one or more from list** link to search for and select curriculum. Now that we have a list of curriculum, we can continue with the tool.



Select Curricula for Adding

Enter Curriculum ID or add one or more from list.

* Curriculum ID:

Add

9. Click **Next**. *Step 4: Edit Assign Dates* of the User Needs Management wizard displays.



Step 3: Adding Curricula

* = Required Fields

Select Curricula for Adding

Enter Curriculum ID or add one or more from list.

* Curriculum ID:

Add

Edit the List of Curricula for Adding

21. The **Assign Date** field pre-fills with the current date by default. You may enter another date; future dates are not accepted.

10. Click **Next**. *Step 5: Complete User Needs Management* of the User Needs Management wizard displays.



Step 4: Edit Assign Dates

Curriculum ID Title Assign Date (MM/DD/YYYY)

Test 01	Test 01	5/9/2011
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11. Review the **User IDs** in the lists of affected users.
12. Verify the **Item** to be assigned.
13. Adjust the **Required Date** if necessary.
Note: The required date is calculated based on the item settings.
14. Click **Run Job Now** or **Scheduled Job** to complete the User Needs Management wizard.

15. If you click **Run Job Now**, a Status page displays. The assignment was completed successfully.

Step 5: Complete User Needs Management

Previous **Run Job Now** Schedule Job

User ID	Name
TMSUSER01	USER01, TMS T

Curriculum	Title	Assign Date
Test 01	Test 01	5/9/2011

Finished

Status:

- Successfully added the curricula to the specified Users.