

Job Aid: Manage Period-Based Curricula

Purpose

The purpose of the Manage Period-Based Curricula job aid is to guide you through the step-by-step process of configuring item periods using both event and calendar basis for initial and retraining assignments.

In this Job Aid, you will learn how to:

- Configure Item Periods: Initial Basis – Event
- Configure Item Periods: Initial Basis – Calendar (Configure Fixed Initial Required by Date)
- Configure Item Periods: Retraining Basis – Event
- Configure Item Periods: Retraining Basis – Calendar



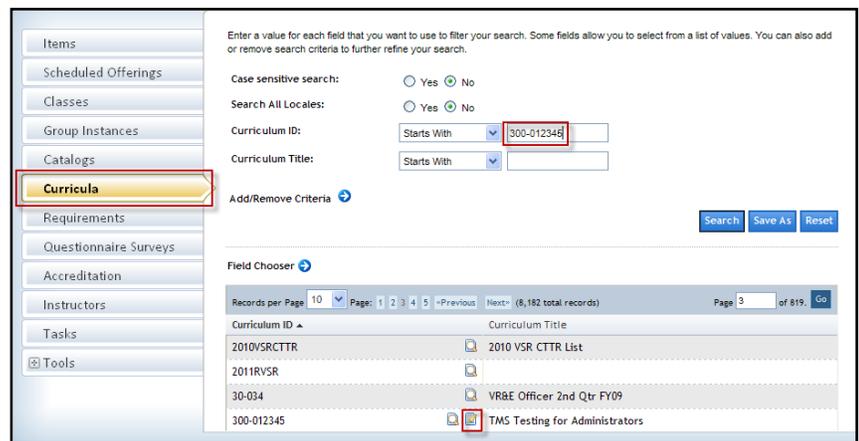
Task A. Configure Item Periods: Initial Basis - Event

Initial basis event uses the assignment date of the curriculum (item) to determine the original required by date (initial assignment) and the Learning History completion date to determine the next required by date (retaining assignment).

Example: A user is assigned an item with an initial assignment of 30 days, initial basis - event, and an assignment date of 10/16/2010. Plateau Learning calculates a required by date of 11/16/2010. It completes the current day period 10/16, then counts 30 days.

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

1. Navigate to **Learning > Curricula**.
2. Enter criteria to find the curriculum in which to edit item periods.
3. Click **Search**.
4. In the search results list, click the **Edit** icon to select the curriculum.



Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

Search All Locales: Yes No

Curriculum ID: Starts With

Curriculum Title: Starts With

Add/Remove Criteria

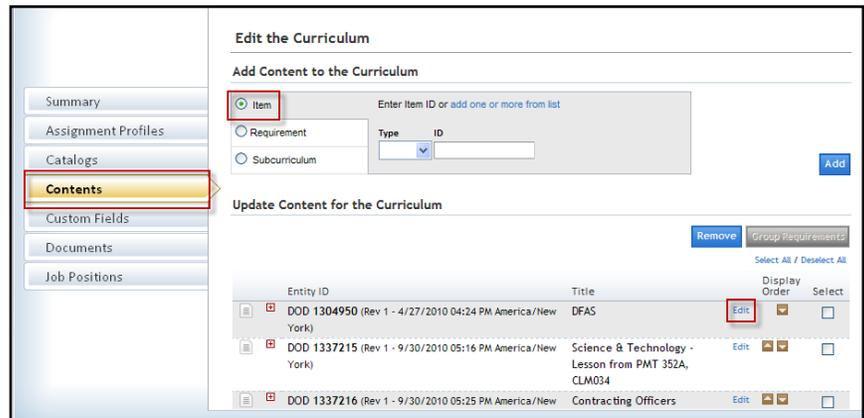
Search Save As Reset

Field Chooser

Records per Page: 10 Page: 1 2 3 4 5 -Previous Next (8,162 total records) Page 3 of 819 Go

| Curriculum ID | Curriculum Title |
|---------------|--------------------------------|
| 2010VSRCTTR | 2010 VSR CTRR List |
| 2011RVSR | |
| 30-034 | VR&E Officer 2nd Qtr FY09 |
| 300-012345 | TMS Testing for Administrators |

5. Select the **Contents** tab.
6. Select **Item** from the **Add Content to the Curriculum** section.
7. Click the **Edit** link next to an item in the list under the **Update Content for the Curriculum** section.



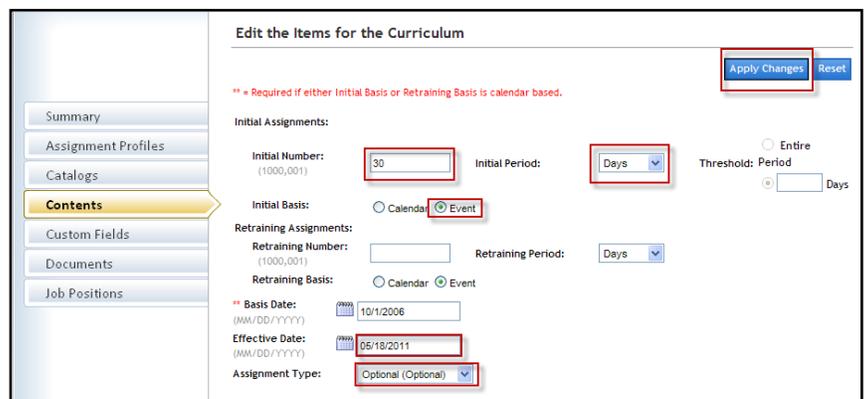
*Initial Assignments Configuration:
30 Day Assignment*

8. Enter an **Initial Number** of **30**.
9. Click the **Event** radio button for **Initial Basis**.
10. Select **Days** from the **Initial Period** drop-down menu (Days, Weeks, Months, Quarter, or Years).

Note: Do not enter retraining assignments.

11. Enter an **Effective Date**.
12. Select an **Assignment Type** from the drop-down menu.
13. Click **Apply Changes**.

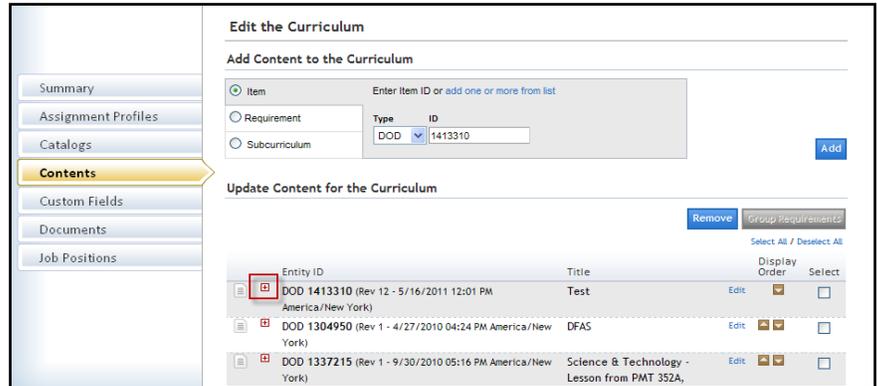
Repeat steps 7 -13 for each item in the curriculum.



Note: For an initial assignment configuration of one month, where TMS completes the current month and then counts one month, enter **1** in the **Initial Number** field and select **Months** from the **Initial Period** drop-down menu. Continue with steps 9-13 above.

For an initial assignment configuration of one year, where TMS completes the current year period and then counts one year, enter **1** in the **Initial Number** field and select **Years** from the **Initial Period** drop-down menu. Continue with steps 9-13 above.

14. Click the **Expand** icon next to each item to review assignment details.



| Entity ID | Title | Display Order | Select |
|--|--|---------------|--------------------------|
| DOD 1413310 (Rev 12 - 5/16/2011 12:01 PM America/New York) | Test | | <input type="checkbox"/> |
| DOD 1304950 (Rev 1 - 4/27/2010 04:24 PM America/New York) | DFAS | | <input type="checkbox"/> |
| DOD 1337215 (Rev 1 - 9/30/2010 05:16 PM America/New York) | Science & Technology - Lesson from PMT 352A, | | <input type="checkbox"/> |

Task B. Configure Item Periods: Initial Basis – Calendar (Configure Fixed Initial Required By Date)

Initial basis calendar uses a basis date which is set at the item level within a curriculum. This prompts the system to start its date calculations from that basis date instead of January 1st. This allows administrators to set a fixed required by date for initial assignments and intervals for retraining periods.

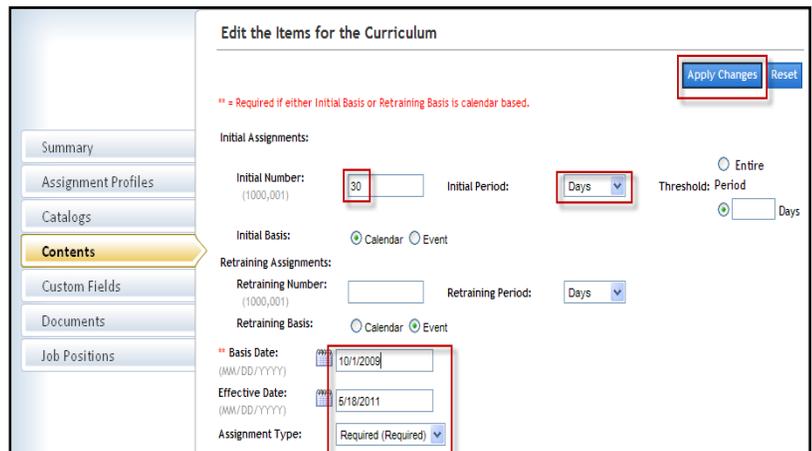
Example: For initial assignments, if an administrator uses initial basis - calendar, a fixed required by date can be set for all users regardless of what date the curriculum (item) is assigned. Using a basis date of 10/01/2009, and a 30 day initial assignment period, TMS creates intervals starting on 10/01/2009, each running for 30 days. If an item is assigned anywhere within that 30 day interval (10/01/2009 - 10/30/2009), TMS calculates a required by date of 10/30/2009.

- Interval 1: 10/01/2009 – 10/30/2009
- Interval 2: 10/31/2009 – 11/30/2009
- Interval 3: 12/01/2009 – 12/30/2009
- Interval 4: 12/31/2009 – 01/30/2010

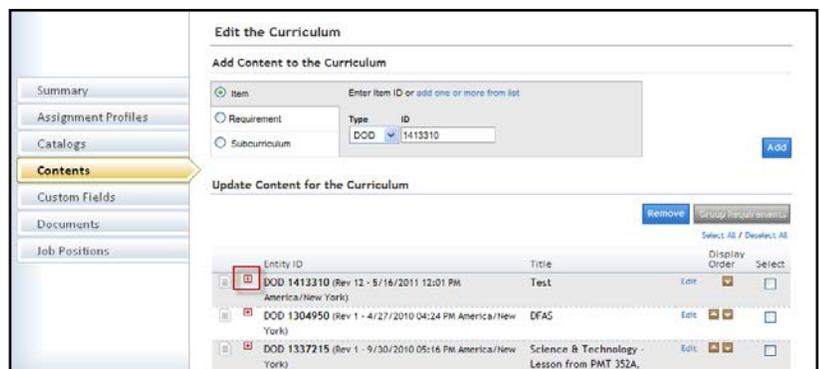
Note: Navigate to the **Edit** link for an item using Steps 1-7 in Task A above.

Initial Assignments Configuration: 30 Day Assignment

1. Enter an **Initial Number** of **30**.
 2. Click the **Calendar** radio button for **Initial Basis**.
 3. Select **Days** from the **Initial Period** drop-down menu (Days, Weeks, Months, Quarter, or Years).
- Note:** Do not enter retraining assignments.
4. Enter a **Basis Date**.
 5. Enter an **Effective Date** (equivalent to a grace period) of today's date, or any date in the past.
 6. Select an **Assignment Type** from the drop-down menu.
 7. Click **Apply Changes**.
- Repeat steps 1-7 for each item in the curriculum.



8. Click the **Expand** icon next to each item to review assignment details.



Initial Assignments Configuration: One Month Assignment

Example: Using the same basis date of 10/01/2009, and a 1 month initial assignment period (instead of 30 days), TMS creates intervals starting on 10/01/2009, each running for 1 month. If an item is assigned anywhere within that 1 month interval (10/01/2009 - 10/31/2009), TMS calculates a required by date of 10/31/2009.

- Interval 1: October 2009
- Interval 2: November 2009
- Interval 3: December 2009
- Interval 4: January 2010

For an initial assignment configuration of one month, enter **1** in the **Initial Number** field and select **Months** from the **Initial Period** drop-down menu. Continue with steps 2-7 under Task B above.

Initial Assignments Configuration: 6 Month Assignment

Example: Using the same basis date of 10/01/2009, and a 6 month initial assignment period (instead of 1 month), TMS creates intervals starting on 10/01/2009, each running for 6 months. If an item is assigned anywhere within that 6 month interval (10/01/2009 - 03/31/2010), TMS calculates a required by date of 03/31/2010.

Interval 1: October 2009, November 2009, December 2009, January 2010, February 2010, March 2010

Interval 2: April 2010, May 2010, June 2010, July 2010, August 2010, September 2010

For an initial assignment configuration of six months, enter **6** in the **Initial Number** field and select **Months** from the **Initial Period** drop-down menu. Continue with steps 2-7 under Task B above.



Task C. Configure Item Periods: Retraining Basis – Event

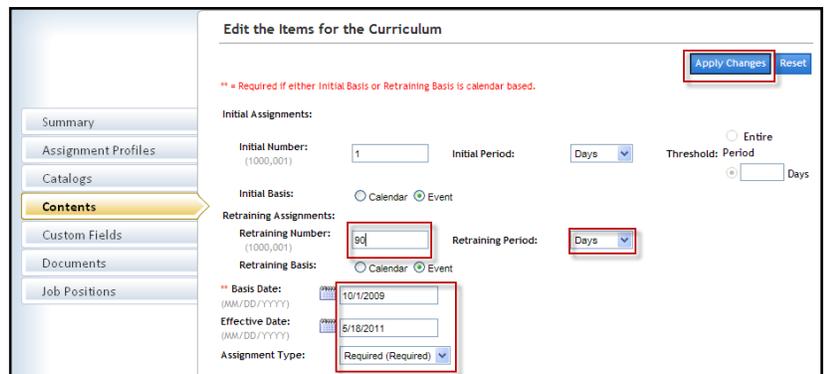
Retraining basis event uses the Learning History completion date to determine the next required by date (retraining assignment).

Example: A user is assigned an item with an initial assignment of 30 days, initial basis - event, and an assignment date of 10/16/2010. This item requires retraining every 90 days, retraining basis - event. TMS calculates an initial required by date of 11/16/2010. (It completes the current day period 10/16, then counts 30 days.) If the user completes the item on 11/01/2010 (this date is recorded in Learning History), then it will be due again 90 days from date of initial completion, 01/30/2011.

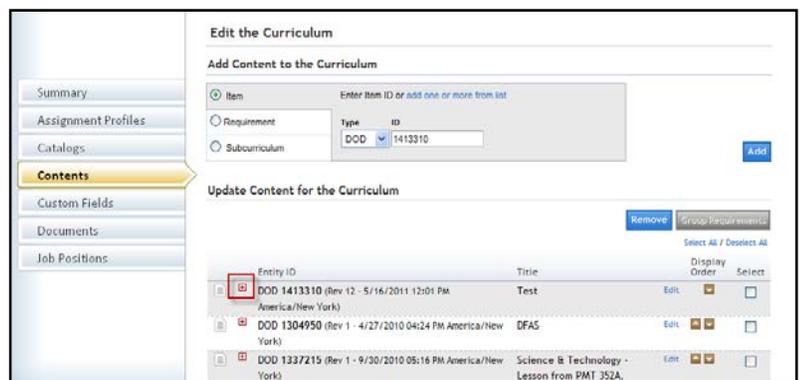
Note: Navigate to the **Edit** link for an item using Steps 1-7 in Task A above.

Retraining Assignments Configuration: 90 Day Retraining Period

1. Enter a **Retraining Number** of **90**.
 2. Select **Days** from the **Retraining Period** drop-down menu (Days, Weeks, Months, Quarter, or Years).
 3. Click the **Event** radio button for **Retraining Basis**.
 4. Enter an **Effective Date** (equivalent to a grace period) of today's date, or any date in the past.
 5. Select an **Assignment Type** from the drop-down menu.
 6. Click **Apply Changes**.
- Repeat steps 1-6 for each item in the curriculum.



7. Click the **Expand** icon next to each item to review assignment details.



Retraining Assignments Configuration: Three Month Retraining Period

Example: Using the same assignment date of 10/16/2010 with an initial assignment of 30 days, but instead of a 90 day retraining period it is a 3-month period, TMS generates an initial required by date of 11/16/2010. If the user completes the item on 11/01/2010 (this date is recorded in Learning History), then it will be due again on 02/28/2011. The system completes the current month period, November, then counts three full months.

For a retraining assignment configuration of three months, enter **3** in the **Retraining Number** field and select **Months** from the **Retraining Period** drop-down menu. Continue with steps 3-7 under Task C above.

Retraining Assignments Configuration: One Year Retraining Period

Example: Using the same assignment date of 10/16/2010 with an initial assignment of 30 days, but instead of a 3-month retraining period it is a 1 year period, TMS generates an initial required by date of 11/16/2010. If the user completes the item on 11/01/2010 (this date is recorded in Learning History), then it will be due again on 12/31/2011. The system completes the current year period, 2010, then counts 1 year.

For a retraining assignment configuration of one year, enter **1** in the **Retraining Number** field and select **Years** from the **Retraining Period** drop-down menu. Continue with steps 3-7 under Task C above.



Task D. Configure Item Periods: Retraining Basis – Calendar

Retraining basis calendar, for retraining periods, allows admins to create different intervals using the basis date. This prompts the system to start its date calculations from the identified basis date instead of January 1st. This can be useful for training that is due at the end of a fiscal year. If an administrator uses retraining basis - calendar, fixed retraining intervals can be set for all users regardless of what date the curriculum (item) is assigned. An admin specifies the start of the calendar basis date in the item details. In the following grid, the basis date is 10/01/2010 and has a calendar basis period of 30 days. Therefore, TMS creates intervals starting on 10/01/2010, each running for 30 days.

Example: If a user completes the item on 10/15/2010 with a retraining assignment of 30 days using the below retraining basis – calendar, TMS generates a new required by date of 11/30/2010. It completes the current calendar period, Interval 1, and then looks for the end of the next interval.

Interval 1: 10/01/2009 – 10/30/2009

Interval 2: 10/31/2009 – 11/30/2009

Interval 3: 12/01/2009 – 12/30/2009

Interval 4: 12/31/2009 – 01/30/2010

Note: Navigate to the **Edit** link for an item using Steps 1-7 in Task A above.



Retraining Assignments Configuration: 30 Day Configuration

1. Enter a **Retraining Number** of **30**.
2. Select **Days** from the **Retraining Period** drop-down menu (Days, Weeks, Months, Quarter, or Years).
3. Click the **Calendar** radio button for **Retraining Basis**.
4. Enter a **Basis Date** of 10/01/2010.
5. Enter an **Effective Date** (equivalent to a grace period) of today's date, or any date in the past.
6. Select an **Assignment Type** drop-down menu.
7. Click **Apply Changes**. Repeat steps 1-7 for each item in the curriculum.
8. Click the **Expand** icon next to each item to review assignment details.

Edit the Items for the Curriculum

Apply Changes Reset

** = Required if either Initial Basis or Retraining Basis is calendar based.

Initial Assignments:

Initial Number: 1 Initial Period: Days Threshold: Entire Days

Initial Basis: Calendar Event

Retraining Assignments:

Retraining Number: 30 Retraining Period: Days

Retraining Basis: Calendar Event

** Basis Date: 10/1/2010

Effective Date: 5/18/2011

Assignment Type: Required (Required)

Edit the Curriculum

Add Content to the Curriculum

Item Enter Item ID or add one or more from list

Requirement Type ID

Subcurriculum DOD 1413310

Add

Update Content for the Curriculum

Remove Group Requirement

Select All / Deselect All

| Entity ID | Title | Display Order | Select |
|--|--|---------------|--------------------------|
| DOD 1413310 (Rev 12 - 5/16/2011 12:01 PM America/New York) | Test | Edit | <input type="checkbox"/> |
| DOD 1304950 (Rev 1 - 4/27/2010 04:24 PM America/New York) | DFAS | Edit | <input type="checkbox"/> |
| DOD 1337215 (Rev 1 - 9/30/2010 05:16 PM America/New York) | Science & Technology - Lesson from PMT 352A, | Edit | <input type="checkbox"/> |

Retraining Assignments Configuration: One Month Retraining Period

Example: If a user completes the item on 10/15/2010 with a retraining assignment of 1 month using the below retraining basis - calendar, TMS generates a new required by date of 11/30/2010. It completes the current calendar period, Interval 1, and then looks for the end of the next interval.

Interval 1: October 2010
Interval 2: November 2010
Interval 3: December 2010
Interval 4: January 2011

For a retraining assignment configuration of one month, enter **1** in the **Retraining Number** field and select **Months** from the **Retraining Period** drop-down menu. Continue with steps 3-7 under Task D above.

Retraining Assignments Configuration: Six Month Retraining Period

Example: If a user completes the item on 10/15/2010 with a retraining assignment of 6 months using the below retraining basis - calendar, TMS generates a new required by date of 09/30/2011. It completes the current calendar period, Interval 1, and then looks for the end of the next interval.

Interval 1: October 2009, November 2009, December 2009, January 2010, February 2010, March 2010
Interval 2: April 2010, May 2010, June 2010, July 2010, August 2010, September 2010

For a retraining assignment configuration of six months, enter **6** in the **Retraining Number** field and select **Months** from the **Retraining Period** drop-down menu. Continue with steps 3-7 under Task D above.