



Admin Job Aid: Create Instructor View

(Revision date: September 9, 2020)

Purpose

The purpose of this job aid is to guide you through the step-by-step process of creating the Instructor View tab for instructors. In order for the Instructor View tab to be visible to instructors when they log into the VA TMS, administrators must add the new instructor to the system, then assign item(s) to the instructor.

A secondary purpose of this job aid is to show how to add instructors to Classes. When administrators complete this task, instructors may use the Instructor View tab to view their classes, manage enrollment, record learning, communicate with participants, and view time slot details.

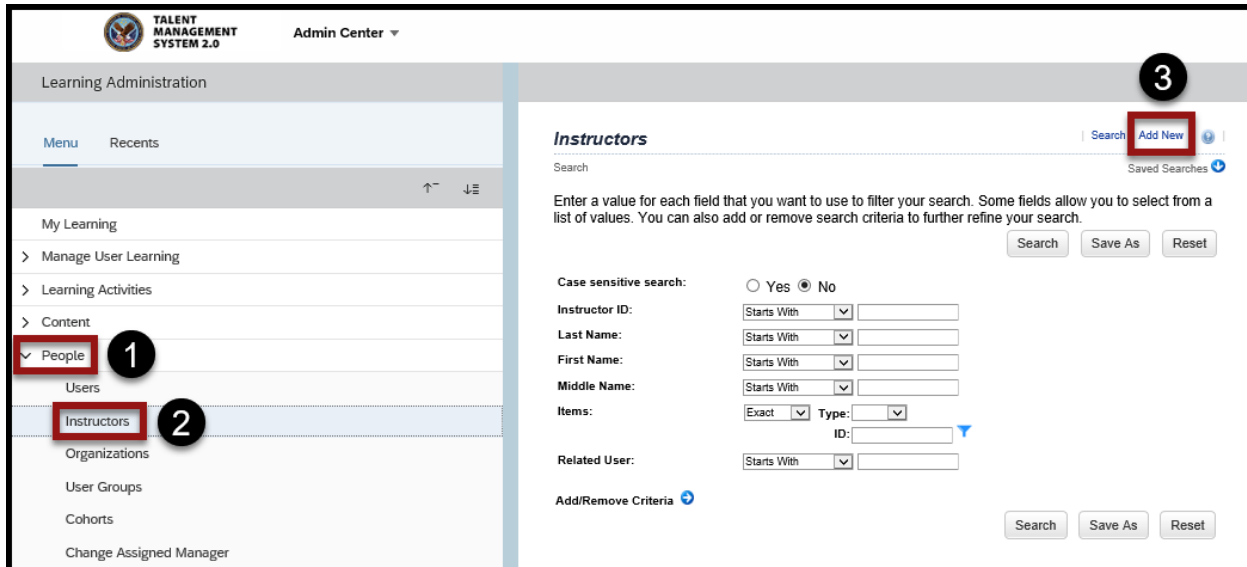
In this job aid, you will learn how to:

- Task A. Add New Instructor to Item(s)
- Task B. Add New Instructor to Class(es)



Task A. Add New Instructor to Item(s)

1. Select **People** to expand the menu of options.
2. Select **Instructors**.
3. Select **Add New**.



The screenshot shows the TMS Admin Center interface. On the left, the 'Learning Administration' sidebar is visible, with the 'People' menu expanded and 'Instructors' selected. The main content area is titled 'Instructors' and contains a search form. The 'Add New' button is highlighted in the top right corner of the search form.

Learning Administration

Menu Recents

My Learning

- > Manage User Learning
- > Learning Activities
- > Content
 - ✓ People
 - Users
 - Instructors
 - Organizations
 - User Groups
 - Cohorts
 - Change Assigned Manager

Instructors

Search Add New

Search Saved Searches

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.

Search Save As Reset

Case sensitive search: ☐ Yes ☒ No

Instructor ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Name: Starts With

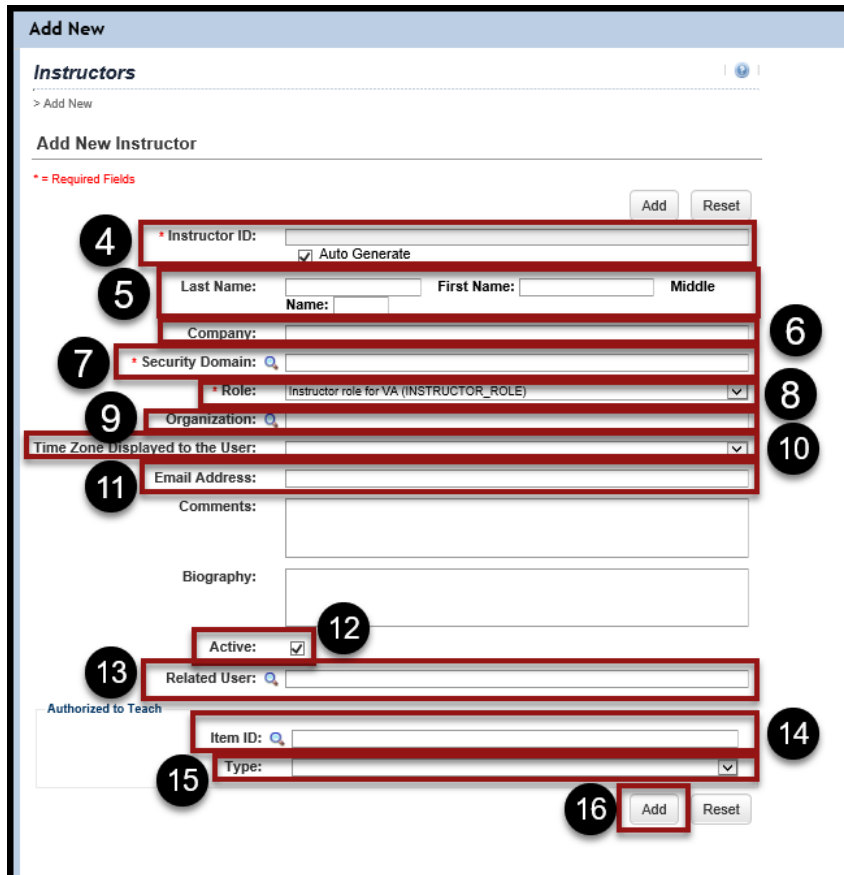
Items: Exact Type ID

Related User: Starts With

Add/Remove Criteria

Search Save As Reset

4. Ensure the **Auto Generate** checkbox is selected for Instructor ID.
5. Enter the **Last Name**, **First Name**, and **Middle Name** for the instructor.
6. Enter the **Company** the instructor works for, if applicable.
7. Enter the **Security Domain**.
8. Select Instructor Role for VA from the **Role** drop-down list.
9. Search for and select an **Organization**.
10. Select a **Time Zone** from the drop-down list.
11. Enter the **Email Address** for the instructor.
12. Ensure the **Active** checkbox is selected.
13. Search for and select a **Related User**.
14. Enter an **Item ID**.
15. Select the Item **Type** from the drop-down list.
16. Select **Add**.



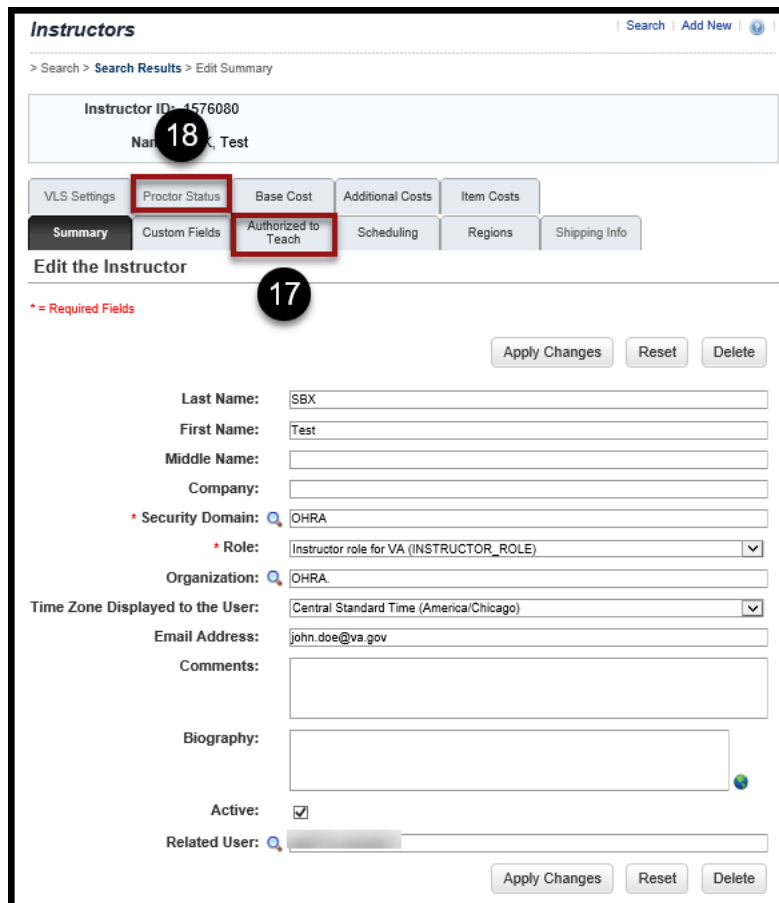
The screenshot shows the 'Add New Instructors' form. Numbered callouts indicate the following steps:

- 4: Instructor ID field with the 'Auto Generate' checkbox checked.
- 5: Last Name, First Name, and Middle Name input fields.
- 6: Company input field.
- 7: Security Domain input field with a search icon.
- 8: Role dropdown menu showing 'Instructor role for VA (INSTRUCTOR_ROLE)'.
- 9: Organization input field with a search icon.
- 10: Time Zone Displayed to the User dropdown menu.
- 11: Email Address input field.
- 12: Active checkbox, which is checked.
- 13: Related User input field with a search icon.
- 14: Item ID input field with a search icon.
- 15: Type dropdown menu.
- 16: The 'Add' button at the bottom right of the form.

17. Select the **Authorized to Teach** tab in to add more items to the instructor.

18. Select the **Proctor Status** tab to set up the instructor as a proctor.

NOTE: By completing Task A, you have successfully created the Instructor View tab which will be visible to your instructors when they log in to VA TMS. However, in order for your instructors to view their classes, manage enrollment, record learning, communicate with participants, and view time slot details, you must complete Task B.

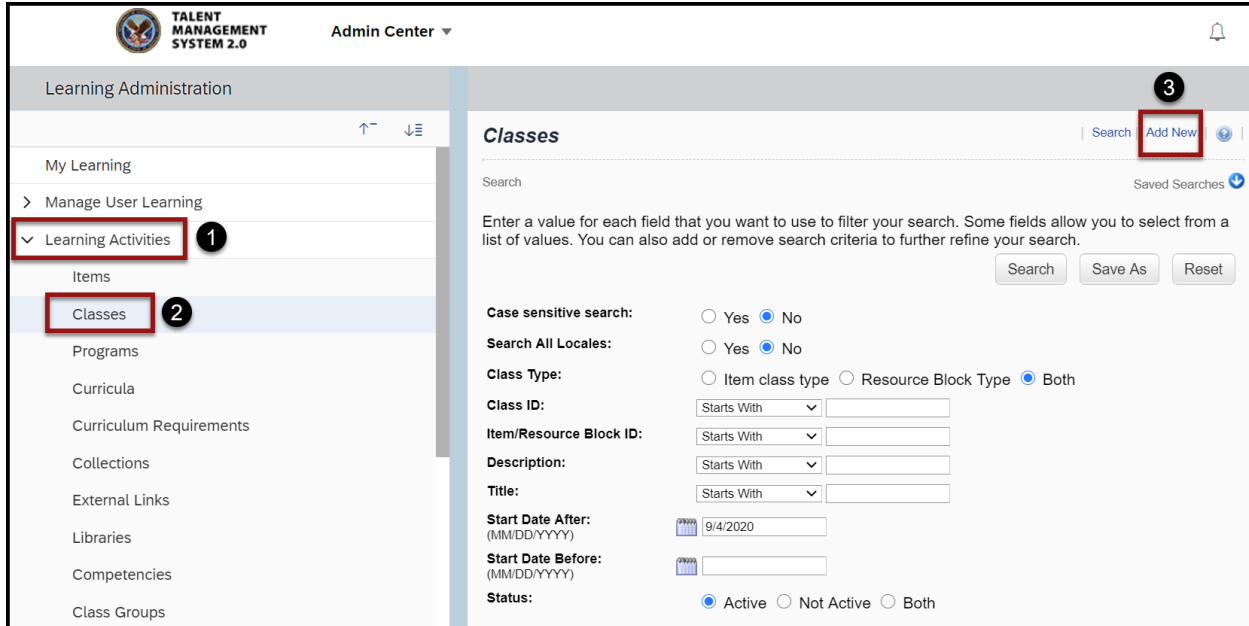


The screenshot shows the 'Instructors' management interface. At the top, there's a search bar and a breadcrumb trail: '> Search > Search Results > Edit Summary'. Below this, the 'Instructor ID: 1576080' is displayed. The 'Name' field shows 'SBX, Test'. A row of tabs is visible: 'VLS Settings', 'Proctor Status', 'Base Cost', 'Additional Costs', 'Item Costs', 'Summary', 'Custom Fields', 'Authorized to Teach', 'Scheduling', 'Regions', and 'Shipping Info'. The 'Proctor Status' tab is highlighted with a red box and labeled '18'. The 'Authorized to Teach' tab is also highlighted with a red box and labeled '17'. Below the tabs, the 'Edit the Instructor' section is shown. It includes a legend '* = Required Fields' and buttons for 'Apply Changes', 'Reset', and 'Delete'. The form fields include: 'Last Name' (SBX), 'First Name' (Test), 'Middle Name' (empty), 'Company' (empty), 'Security Domain' (OHRA), 'Role' (Instructor role for VA (INSTRUCTOR_ROLE)), 'Organization' (OHRA), 'Time Zone Displayed to the User' (Central Standard Time (America/Chicago)), 'Email Address' (john.doe@va.gov), 'Comments' (empty text area), 'Biography' (empty text area), 'Active' (checked checkbox), and 'Related User' (empty dropdown). At the bottom, there are 'Apply Changes', 'Reset', and 'Delete' buttons.



Task B. Add New Instructor to Class(es)

1. Select **Learning Activities** to expand the menu of options.
2. Select **Classes**.
3. Select **Add New** link.



TALENT MANAGEMENT SYSTEM 2.0 Admin Center

Learning Administration

- My Learning
- > Manage User Learning
- ✓ Learning Activities **1**
 - Items
 - Classes** **2**
 - Programs
 - Curricula
 - Curriculum Requirements
 - Collections
 - External Links
 - Libraries
 - Competencies
 - Class Groups

Classes **3** [Add New](#)

Search

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.

Search Save As Reset

Case sensitive search: ☐ Yes ☒ No

Search All Locales: ☐ Yes ☒ No

Class Type: ☐ Item class type ☐ Resource Block Type ☒ Both

Class ID: Starts With

Item/Resource Block ID: Starts With

Description: Starts With

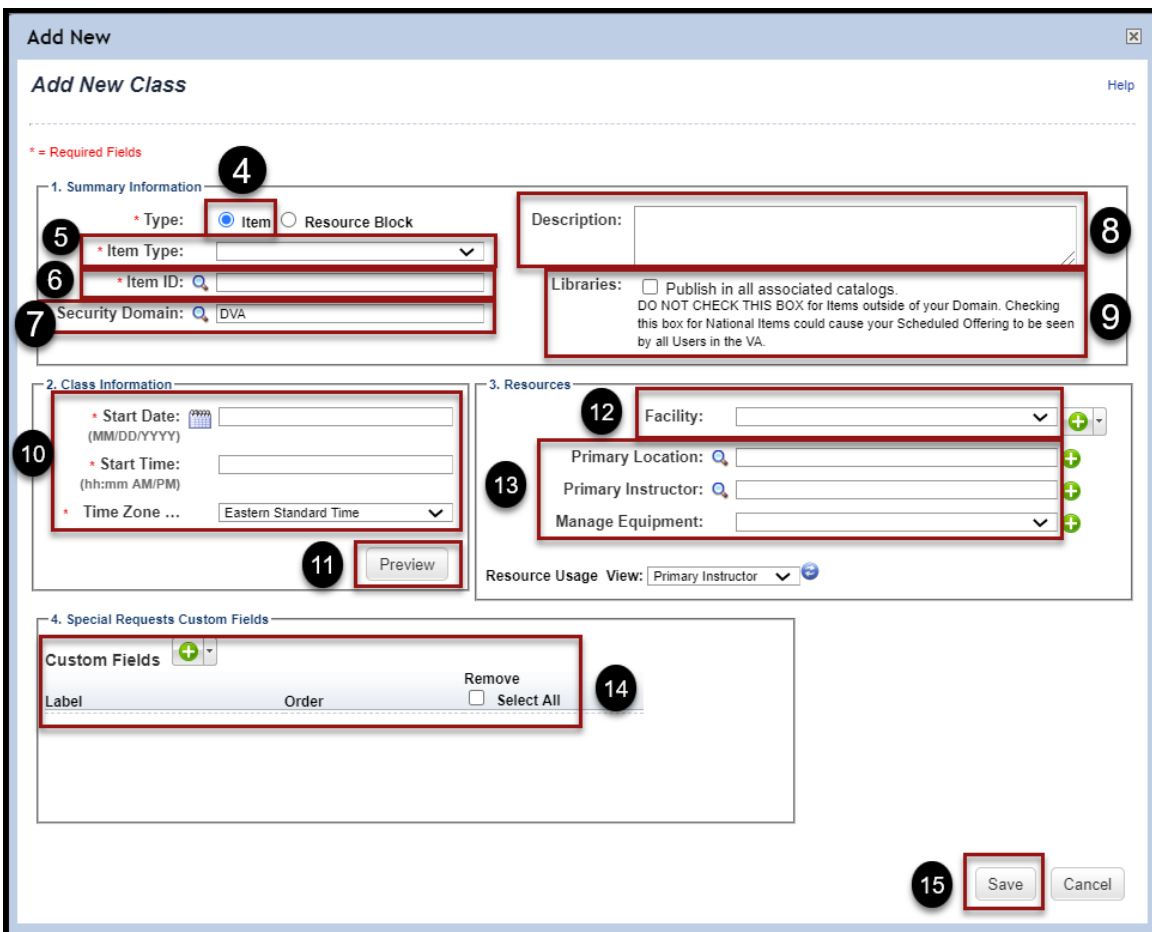
Title: Starts With

Start Date After: (MM/DD/YYYY) 9/4/2020

Start Date Before: (MM/DD/YYYY)

Status: ☒ Active ☐ Not Active ☐ Both

4. Select **Item** as the Type.
5. Select **Item Type** from the drop-down list.
6. Select the **magnifying glass search icon** to search for and select an Item.
7. Enter the **Security Domain**.
8. Enter a **Description** for the class.
9. Check the box to **publish** the class in all associated libraries.
10. Select a start date, start time, and time zone.
11. Select **Preview** to view the basic information of the class.
12. Select a **Facility** from the drop-down list.
13. If applicable, select other resources associated with the class.
14. If appropriate, complete the Special Requests **Custom Fields**.
15. Select **Save**.



Add New

Add New Class Help

* = Required Fields

1. Summary Information

4. * Type: ☒ Item ☐ Resource Block

5. * Item Type:

6. * Item ID:

7. Security Domain: DVA

Description:

8. Libraries: ☐ Publish in all associated catalogs.
DO NOT CHECK THIS BOX for Items outside of your Domain. Checking this box for National Items could cause your Scheduled Offering to be seen by all Users in the VA.

2. Class Information

10. * Start Date: (MM/DD/YYYY)

* Start Time: (hh:mm AM/PM)

* Time Zone: Eastern Standard Time

11.

3. Resources

12. Facility:

13. Primary Location:

Primary Instructor:

Manage Equipment:

Resource Usage View: Primary Instructor

4. Special Requests Custom Fields

Custom Fields

Label	Order	Remove
		<input type="checkbox"/> Select All

14.

15.