Total Workforce Management Services (TWMS) Quick User Guide

Managing Training Requirements



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Training Requirements - Summary

The Training Requirements module in TWMS provides the functionality to assign and manage the required training for your personnel. You will only be able to assign training requirements for those within your scope of access of the TWMS account you are logged into. To use this module you must either have the "Training Requirements – Full Management" or "Training Requirements – Limited Management" privilege. Please contact your TWMS Admin POC for these account privileges.

This module allows you to create a training requirement specific to your needs. For example, you will be able to create and assign a training requirement for all civilian personnel having a specific occupational series.

Using the Automation Rules feature will allow TWMS to auto-manage the members of your training requirement. Using the example above, each time a new civilian employee with that specific occupational series moves into or out of your scope of access that employee will automatically be added to or removed from that training requirement.

Additional features will let you select one or more alternates who will also be able to manage the training requirements you have created. You will also be able to request access to a requirement that you did not create or copy attributes of an existing training requirement for your use that someone else has created. Finally, TWMS allows you to generate email notifications to employees and their supervisors regarding new training requirements and/or email reminders about completing existing ones.

Accessing the Training Requirement Module

TWMS allows you to create a training requirement that can be assigned to employees within your scope of access. You can also select other personnel as alternates to this training requirement so that they may also add employees that are within their scope of access.

To access the Training Requirement module in TWMS*:

 From the Home Page click on the Tools/Function button on the Actions Menu.

- 2. From the Tools & Functions form choose the **Manage Training Requirements** button located within the Training Tools header.
 - * You must have the appropriate privilege to create, view, edit, and copy training requirements.



ACTIONS:

Accessing the Training Requirement Module

The Training Requirements main window is now displayed. Initially, the list of Active training requirements you created will be listed. The four buttons found on the Navigation Menu are described below.

Search -

Displays the list of training requirements based upon your search criteria. Do not confuse this list with the training course(s) that have been selected that will satisfy the requirement.

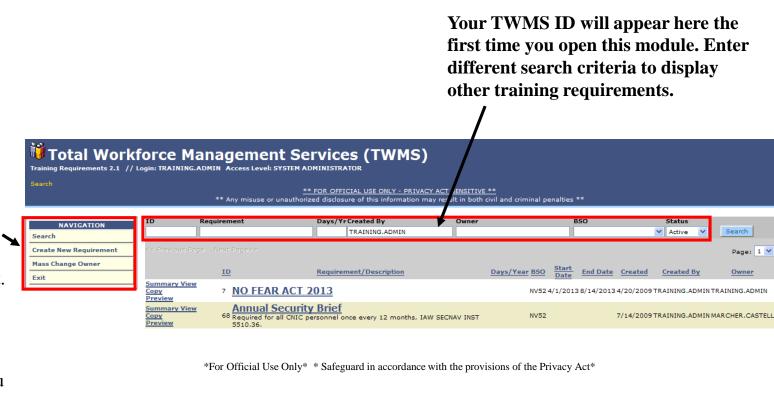
Create New Requirement – Allows you to create a new training requirement.

Mass Change Owner -

Allows you to select a new owner for all the training requirements you have selected.

Exit –

Closes this window.



Creating a training requirement is one way for you to manage your mandatory training. You can also copy an existing training requirement someone else has created for your own use or request access to an existing requirement for your use.

To create a training requirement:

1. Click the Create
New Requirement
button on the
Navigation Menu.



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A new form opens and is displayed here. A brief description of the available fields is found below. Required fields are indicated in yellow.

2. Enter the required fields as necessary for the new training requirement.



3. Click the **Create Requirement** button.

Requirement Name – Enter the name of the training requirement here.

Description/Notes – Useful information about the training requirement can be entered here. This information is displayed for members in self-service when they access the training requirement.

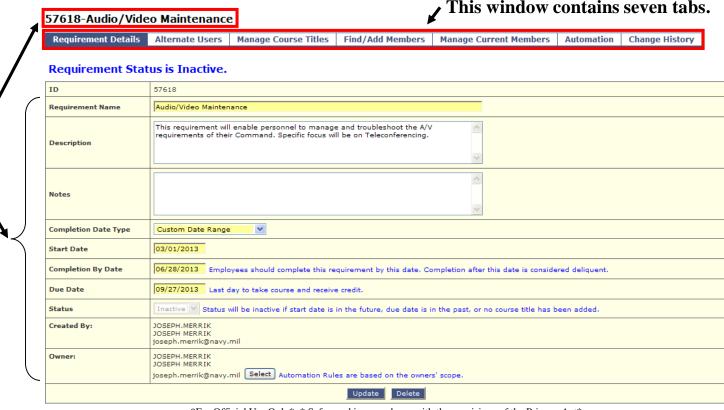
Completion Date Type – Several choices are available that determine when the requirement needs to be completed by. For example, choosing "Custom Date Range" requires a Start Date, A Completion By date, and a Due Date. Other Completion Date Types (shown to the right) require different data to be entered.



After creating the new training requirement the Edit Requirement window is now displayed and is divided into seven tabs. The default tab, "Requirement Details", is shown below.

TWMS auto-generates a Training Requirement ID and is displayed here along with the name of the training requirement you previously entered.

4. Enter updates/changes to this training requirement.



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Each tab allows you to control the attributes for each part of the training requirement such as identifying alternates, managing course titles and assigned personnel, and defining any automation you would like to apply. Together, the information in these tabs will allow you to effectively manage your training requirement.

57618-Audio/Video Maintenance

Manage Course Titles Find/Add Members Manage Current Members Automation Change History Requirement Status is Inactive. *Note: The status of your training* Requirement Name Audio/Video Maintenance requirement will remain This requirement will enable personnel to manage and troubleshoot the A/V requirements of their Command, Specific focus will be on Teleconferencing. "Inactive" if one of three Description conditions are met. 1) The start date is in the future Notes 2) The due date is in the past. 3) There are no course titles Custom Date Range Completion Date Type selected. Start Date 03/01/2013 Completion By Date 06/28/2013 Employees should complete this requirement by this date. Completion after this date is considered deliquent 09/27/2013 Last day to take course and receive credit Due Date Status Inactive 🚩 Status will be inactive if start date is in the future, due date is in the past, or no course title has been added JOSEPH.MERRIK Created By: JOSEPH MERRIK joseph.merrik@navy.mil Click **Update** if you make JOSEPH.MERRIK Owner: joseph.merrik@navy.mil [Select] Automation Rules are based on the owners' scope. any changes.

March 2019

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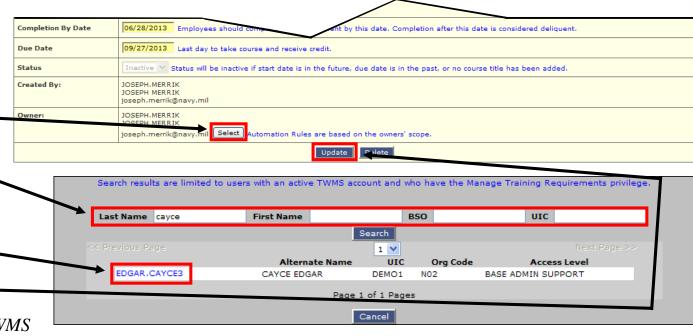
Changing Owners

When a training requirement is initially created the "Owner" is identical to the "Created By" employee. There might be instances where you want the owner to be a different employee than the creator. For example, the scope of the owner's TWMS account is what is used if there are Automation Rules that have been defined and enabled for the training requirement. Please refer to "Defining Automation — Member Rules" discussed later in this guide for more information.

To change the Owner of a training requirement:

- 1. Click the **Select** button.
- 2. Enter your search criteria to find the new Owner.
- 3. Select the name of the employee to add as the Owner.
- 4. Click **Update**.

Note: Only employees with an active TWMS account and having one of the Training Requirements privileges can be selected.



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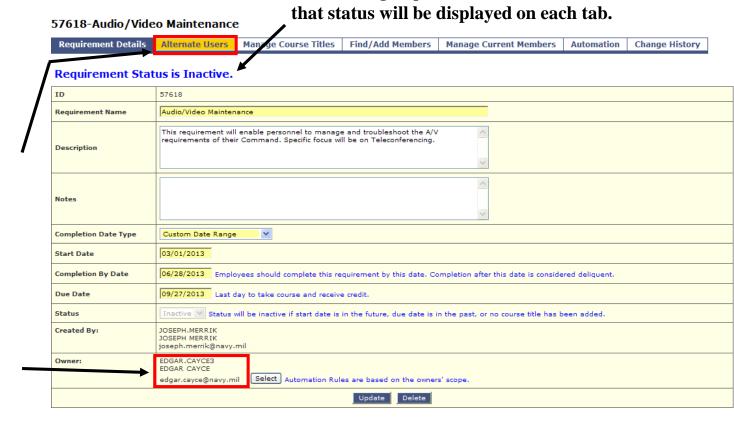
Adding Alternates

Adding one or more alternates will allow you to control who else will also have the ability to manage the training requirement. Only employees with an active TWMS account and who have one of the Training Requirements privileges can be selected as an alternate.

To add an alternate to a Training Requirement:

1. Click the **Alternate Users** tab.

From the previous steps, the new name of the Owner is now displayed.



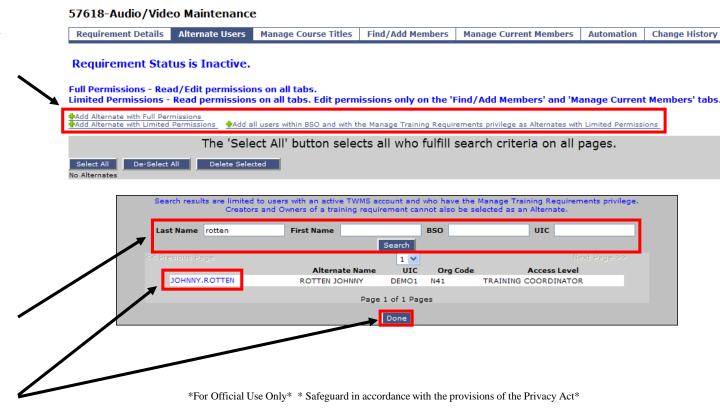
If a training requirement is "Inactive" then

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Adding Alternates

There are two types of alternates: 1) Full permissions - allows full access to make any change to the training requirement, 2) Limited permissions - allows the ability to only add and modify personnel assigned to the training requirement.

- 2. Select one of the three hyperlinks pertaining to the type of alternate(s) you would like to add to this training requirement.
 - Continue to step 3 if the Add Alternate With Full Permissions, or Add Alternate With Limited Permissions hyperlink is selected.
- 3. Enter your search criteria to find the alternate(s) for this training requirement and then click **Search**.
- 4. Select the name of the employee to add as an alternate and then click **Done**.

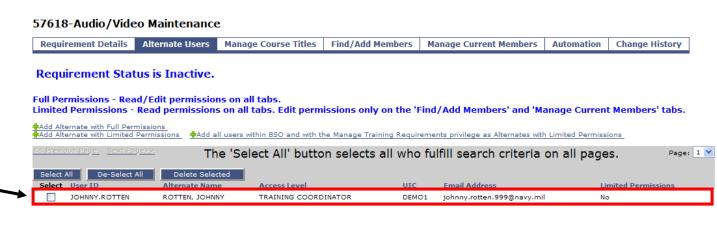


Adding Alternates

Selected Alternates who have full permissions will also be able to manage Owners and Alternates of the training requirement. Alternates having limited permissions can only modify members of the training requirement based upon their scope of access in TWMS. They will NOT be able to change the details of the requirement, modify courses, or manage the automation rules.

5. To add more alternates of the same type, repeat steps 3-4. To add a different type of alternate repeat steps 2-4.

The list of Alternates will be displayed here.



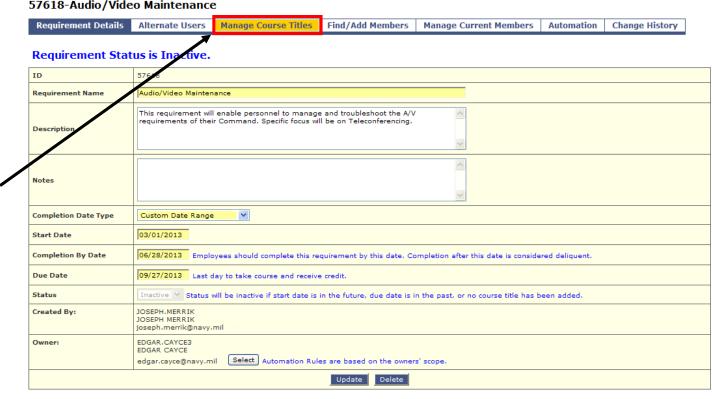
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Note: If the Add all users within BSO and with one of the Training Requirements privilege as an Alternate with Limited Permissions hyperlink is selected then these alternates are automatically added.

The previous steps discussed how to change owners and select alternates. The five remaining tabs will guide you through how to help you enter/select all the other needed information. There is no order in which this information needs to be completed.

To add a course title to a training requirement:

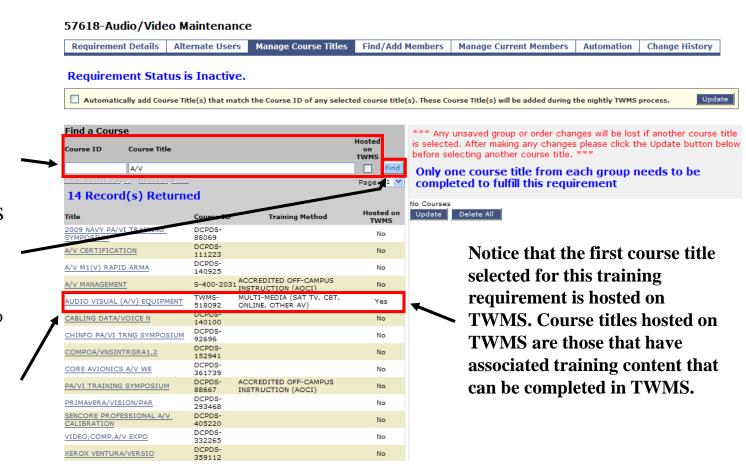
1. Click the Manage Course Titles tab to select the course title(s) that will satisfy this training requirement.



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The Manage Course Titles form now displays and is used to find the course title(s) in the TWMS Course Table that you will select that, when completed, will satisfy this training requirement.

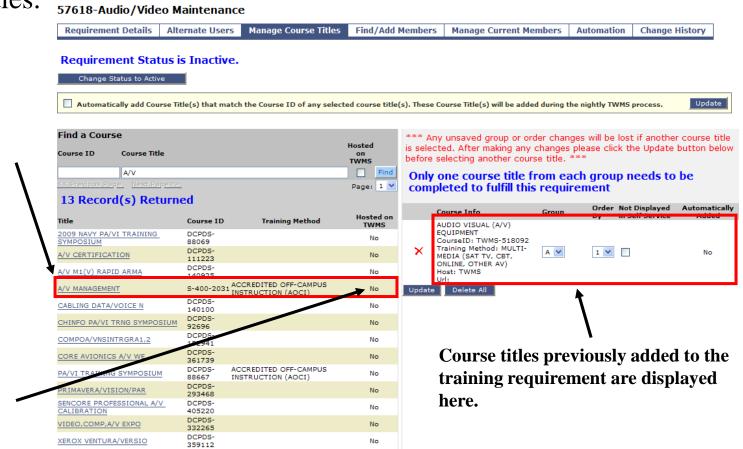
- 2. Enter the Course ID,
 Course Title (or any part of it), and/or select whether the course is currently hosted on TWMS.
- 3. Click **Find** to display the course title(s) in the TWMS
 Course Table that match your search criteria.
- 4. Click the course title hyperlink to add that title to the list of course titles that will satisfy this training requirement.



The attributes of a selected course title will determine if you need to provide additional information before adding it to your training requirement. For example, because the course title previously selected is hosted on TWMS it was immediately added to the training requirement. See the next slide for more information regarding non-TWMS course titles.

5. Repeat step 4 to add other course titles from the same search results or repeat steps 2-4 to search for other course titles.

Notice that the second course title selected for this training requirement is not hosted on TWMS. Course titles not hosted on TWMS may or may not have training content associated with them. See the next slide for more information.



If a selected course title has content hosted on Navy e-Learning (NeL) then members assigned to the training requirement who have completed that course will display as also completing the training requirement. If the selected course title is not hosted on TWMS or NeL then members assigned to the training requirement who have completed that course will need to have their training completions entered manually in TWMS in order to display as completing the training requirement.

- 6a. If the selected course title is identical to a course hosted on NeL then choose this option. The Course URL for these NeL course titles is shown here and can not be changed. For all personnel assigned to the training requirement, the displayed hyperlink will automatically open a new browser window displaying the NeL login page.
- 6b. If the selected course title is identical to a course hosted on another website then choose this option. Enter the URL where this course is hosted. For all personnel assigned to the training requirement, the displayed hyperlink will automatically open a new browser window showing that hosted site. Training completions of course titles having content hosted on other sites will need to be manually entered in TWMS.
- 6c. If the selected course title is not available anywhere as an online course then choose this option. Training completions of course titles without a hyperlink will need to be manually entered in TWMS.

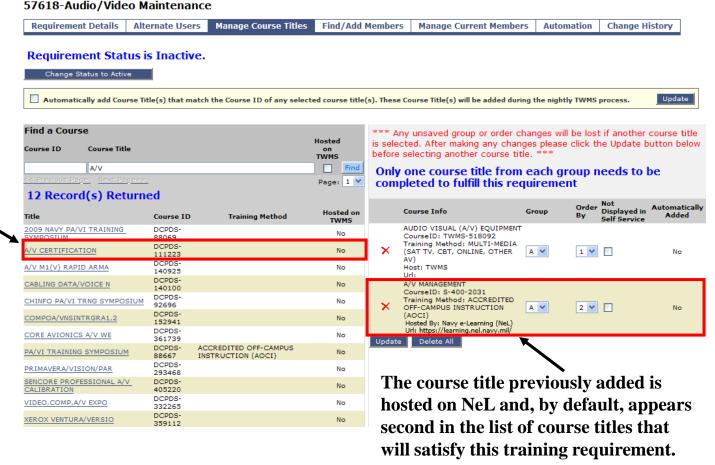


7. Click **Add Course**.

Sometimes you may need to add a course title to a training requirement which has previously been completed by a civilian employee and is already included in their official training record. These course titles in the TWMS Course Table will almost always have the Course ID type, "DCPDS-xxxxxxx".

8. If needed for your training requirement, select a course title with a Course ID type of DCPDS-xxxxxx.

Note: You cannot have a Course ID of this type as the **only** course title to be completed to satisfy a training requirement.



Selecting a course title having this type of Course ID may be added to a training requirement but, by default, will not be included in the displayed list of course titles that will satisfy it. For more information, see "<u>Previewing a Training Requirement</u>" later in this guide.

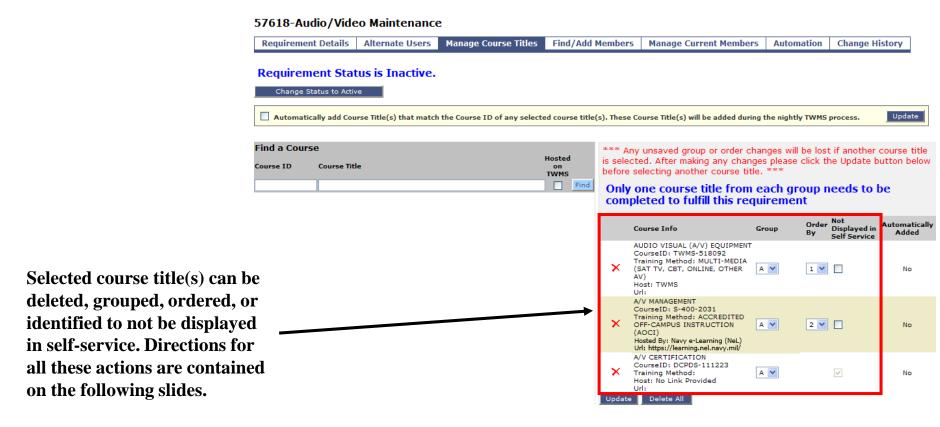
57618-Audio/Video Maintenance

Manage Course Titles Find/Add Members Requirement Details Alternate Users Manage Current Members Automation Change History Requirement Status is Inactive. Change Status to Active Update Automatically add Course Title(s) that match the Course ID of any selected course title(s). These Course Title(s) will be added during the nightly TWMS process. Find a Course *** Any unsaved group or order changes will be lost if another course title Hosted is selected. After making any changes please click the Update button below Course ID Course Title before selecting another course title. *** TWMS Only one course title from each group needs to be Page: 1 V completed to fulfill this requirement 11 Record(s) Returned Order Displayed in Automatically Course Info Hosted on Course ID Training Method TWMS 2009 NAVY PA/VI TRAINING AUDIO VISUAL (A/V) EOUIPMENT DCPDS-No CourseID: TWMS-518092 88069 DCPDS-Training Method: MULTI-MEDIA A/V M1(V) RAPID ARMA 1 💙 A 🕶 (SAT TV, CBT, ONLINE, OTHER 140925 DCPDS-CABLING DATA/VOICE N No Host: TWMS 140100 Url: DCPDS-CHINFO PA/VI TRNG SYMPOSIUM A/V MANAGEMENT 92696 CourseID: S-400-2031 DCPDS-COMPOA/VNSINTRGRA1,2 Training Method: ACCREDITED No 152941 OFF-CAMPUS INSTRUCTION A 🕶 2 🗸 DCPDS-(AOCI) CORE AVIONICS A/V WE No 361739 Hosted By: Navy e-Learning (NeL Url: https://learning.nel.navy.mil/ DCPDS-ACCREDITED OFF-CAMPUS PA/VI TRAINING SYMPOSIUM No INSTRUCTION (AOCI) 88667 A/V CERTIFICATION DCPDS-CourseID: DCPDS-111223 A 💙 Training Method: No Host: No Link Provided SENCORE PROFESSIONAL A/V No 405220 DCPDS-VIDEO, COMP, A/V EXPO 332265 XEROX VENTURA/VERSIO 359112 Note that this course title will never be accessible in self-service.

All course titles having a Course ID type of "DCPDS-xxxxxx" will always appear at the end of the list of course titles that will satisfy a training requirement.

Managing Selected Course Titles

After a course title is added there are many options you have to determine how and if it will be displayed for personnel assigned to complete the training requirement. The results of these display options will all take effect in the self-service view of the training requirement for those personnel. For more information, see "Previewing a Training Requirement" later in this guide.



Deleting Course Titles

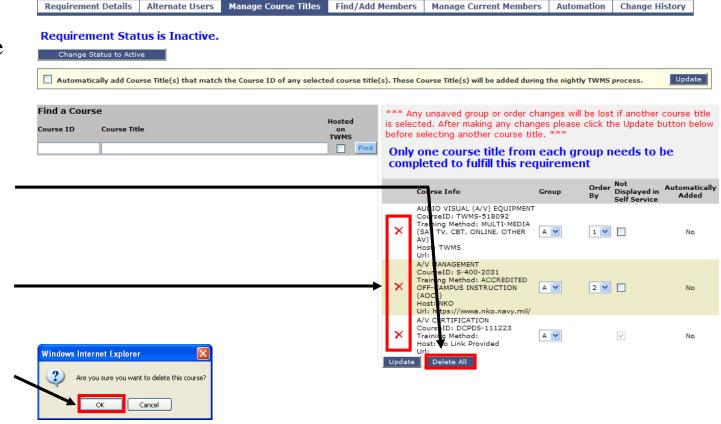
You are able to delete one or more course titles from a training requirement. If the requirement has only one course title then it will no longer be active and the "Completed" status for all members who have completed that course will update to

57618-Audio/Video Maintenance

"No".

To delete one or more course title(s) from a training requirement:

- 1a. Click the **Delete All** button to delete all course titles.
- 1b. Click the Delete icon next to a course title to delete an individual course title.
- 2. Click **OK**.



Ordering the Display of Course Titles

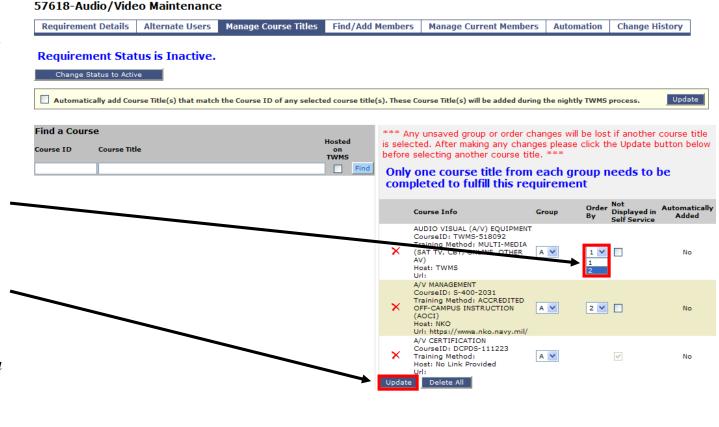
You can determine in what order you would like to have the course titles appear in the training requirement when viewed in self-service. For more information, see "Previewing a Training Requirement" later in this guide.

To order the course titles in a training requirement:

 Click the dropdown arrow next to a course title to change the order in which it will be displayed in self-service.

2. Click **Update**.

Note: Your changes will be lost if you find another course title before clicking the Update button.



Hiding the Display of Course Titles

For a course title having content hosted on TWMS, NeL, or through another URL you can decide not to display it in the training requirement. This may be useful for those course titles that are no longer acceptable to complete during the training requirement period but are still "creditable" for the personnel who have already completed the content associated with it.

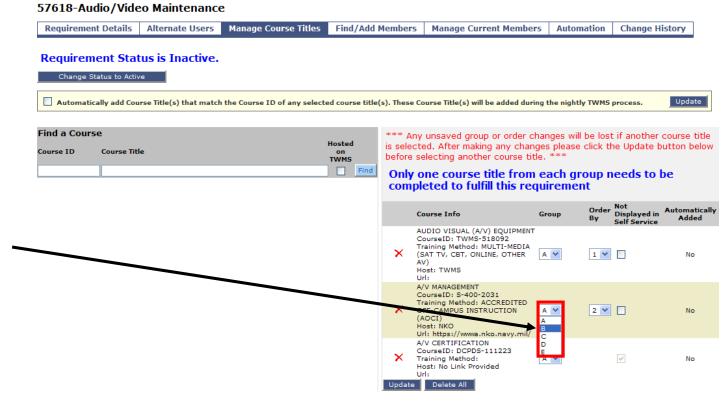
57618-Audio/Video Maintenance To hide one or more course Requirement Details Alternate Users Find/Add Members Manage Course Titles Manage Current Members Change History titles in a training requirement: Requirement Status is Inactive. Change Status to Active Update Automatically add Course Title(s) that match the Course ID of any selected course title(s). These Course Title(s) will be added during the nightly TWMS process Check the box next to each Find a Course *** Any unsaved group or order changes will be lost if another course title Hosted is selected. After making any changes please click the Update button below course title that you would like before selecting another course title. *** TWMS to hide. Only one course title from each group needs to be completed to fulfill this requirement Not Displayed in Order Automatically Course Info Added AUDIO VISUAL (A/V) EQUIPMENT CourseID: TWMS-518092 ing Method: MULTI-MEDIA 1 ٧ Host: TWMS Click **Update**. CourseID: S-400-2031 2 ٧ OFF-CAMPUS INSTRUCTION Note: Your changes will be lost if you find another course title before A/V CERTIFICATION CourseID: DCPDS-111223 A V Training Method: clicking the Update button.

Grouping Course Titles

You may need to create a training requirement where the content associated with more than one course title is required to be completed before the training requirement is satisfied. In this case, you must place these required courses into different "groups".

To change groups for one or more course titles in a training requirement:

1. Click the dropdown arrow next to a course title to change the group which it belongs to.



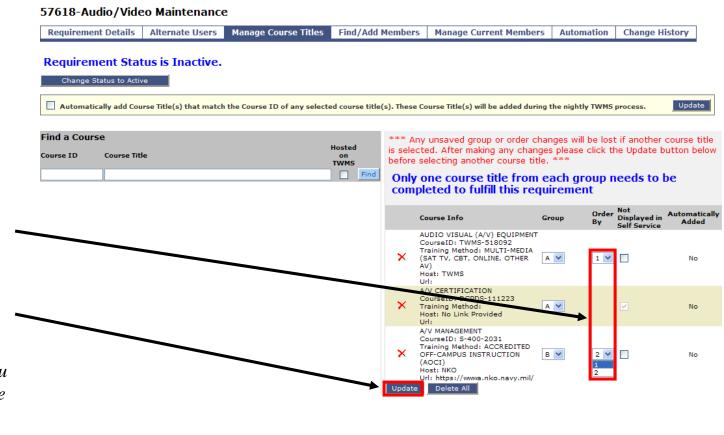
Grouping Course Titles

Each group may contain more than one course title but only one course within each group needs to be completed. The training requirement will be satisfied only after at least one course from all groups have been completed.

2. After making changes to a course titles' group you may need to change the "Order By" number for one or more of the course titles to display them in the way you want them to appear within their respective group.

Click **Update**.

Note: Your changes will be lost if you find another course title before clicking the Update button.



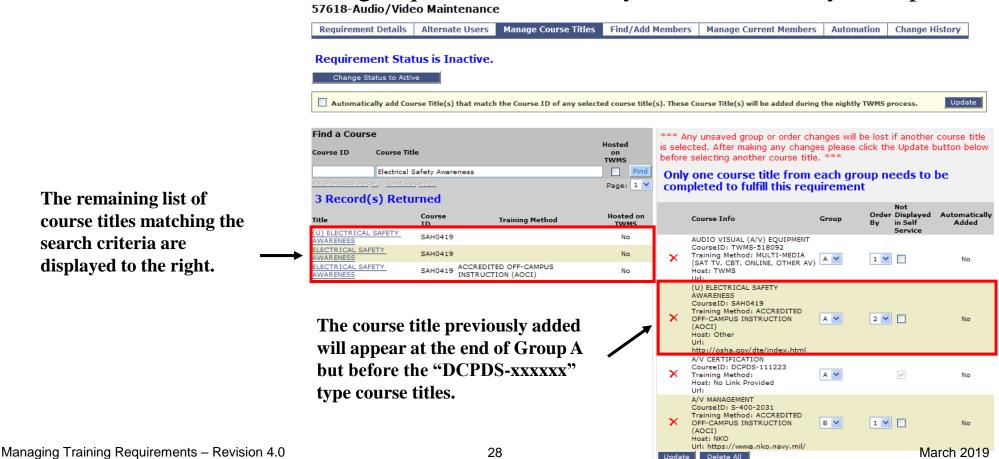
Grouping Course Titles



All course titles added to a training requirement are found using the TWMS Course Table. Because the TWMS Course Table receives these course titles from multiple sources, there are instances where there can be identical Course IDs having different course titles or training methods. For example, the course title entered below resulted in four distinct records in the TWMS Course Table. In some cases you may not know if there are identical Course IDs in the TWMS Course Table.



If the members assigned to complete the training requirement have completed the content associated with the course title just added then they will satisfy Group A of the training requirement. If the members assigned to complete the training requirement have completed content associated with one of the other three course titles NOT added to the training requirement then they will NOT satisfy Group A.

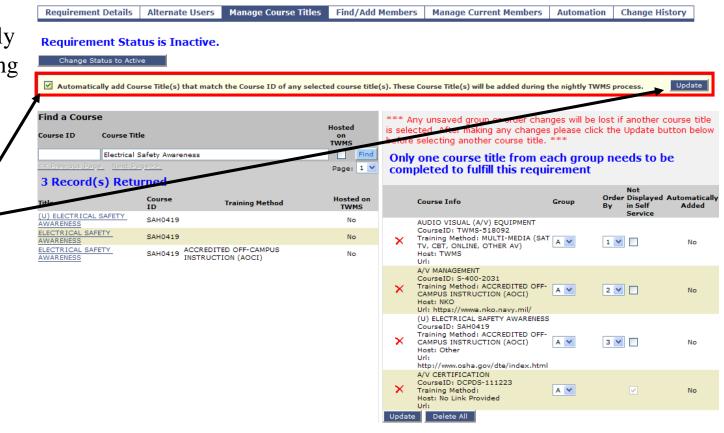


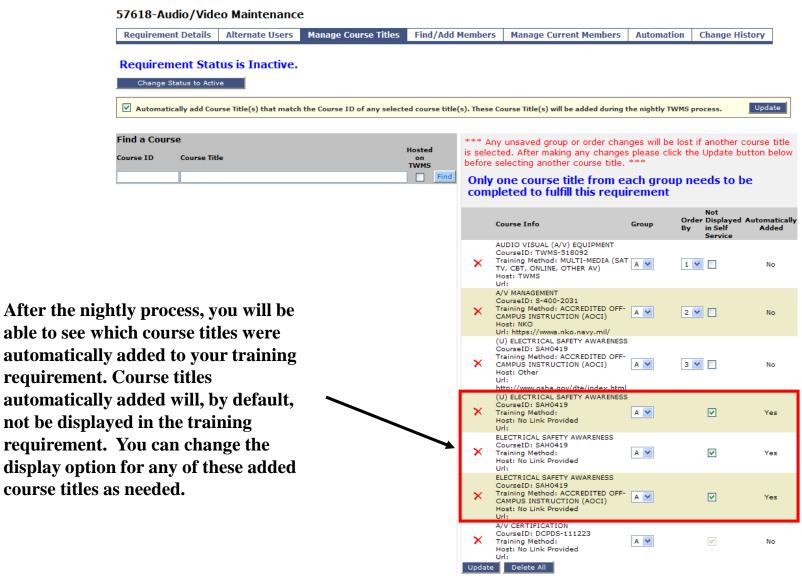
You can choose if you want TWMS to automatically add to the training requirement other course title(s) with the identical Course ID to those that have already been selected. This will ensure that all personnel assigned to complete the training requirement will receive credit for completing the content associated with any of these course titles.

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To have TWMS automatically add course title(s) to a training requirement:

- Check the box to enable this nightly process.
- 2. Click **Update**.

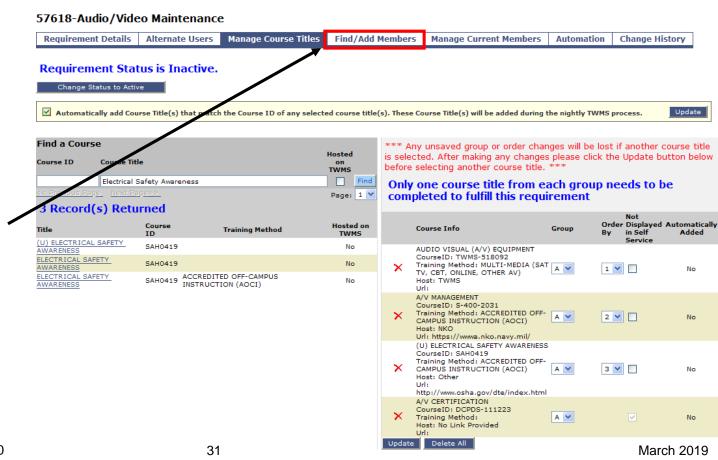




After adding the course title(s) to your training requirement you are now ready to search and add employees who will be required to complete the requirement. Those who have been added to a training requirement are defined as members. Your search results will always be based upon 1) the scope of access of your TWMS account and 2) those who are not already a current member of the training requirement.

To find/add members to a training requirement:

1. Click the **Find/Add Members** tab to find the employees who will be required to complete this training requirement.



You can search for employees to add to this training requirement any number of ways. As needed, use the search criteria to narrow your scope to the relevant population of the training requirement.

57618-Audio/Video Maintenance Enter your search criteria as Requirement Details Alternate Users Manage Course Titles Find/Add Members Manage Current Members required using the fields below. If you need to select Requirement Status is Inactive. one or several UICs in your BSO/SMC/UIC/Org Code Last Name scope click the **Select UICs** Assigned 🗸 ~ Security Clearance Civ Grade Mil Grade Emp Type hyperlink shown below. ACTIVE DUTY No Access Select UICs CIVILIAN-APF LAA Confidential CTV/II TAN-FND LAA Secret Pay Plan Duty/Role Type OGE 450 Duty/Role Agreement Type \sim DPP Career Field Sup Lvl ~ *Note:* Entering no search **DAWIA Employee** criteria will return all Private Owned Purchase Card Holder employees in your scope who are not currently a

member of the training

requirement.

3. If the UIC is already displayed then click its hyperlink to add it to your search criteria. If it is not displayed then you can find it by entering the UIC or Command in the provided fields and then clicking **Search**.

Search

Command

Search

Command Name

DEMO1

COMMANDER, NAVY APPLICATION DEMO COMMAND

DEMO2

DEMO3

USMC TWMS APPLICATION DEMO COMMAND

DEMO4

USMC TWMS APPLICATION DEMO COMMAND

DEMO8

CNIC HQ-SD

DEMO9

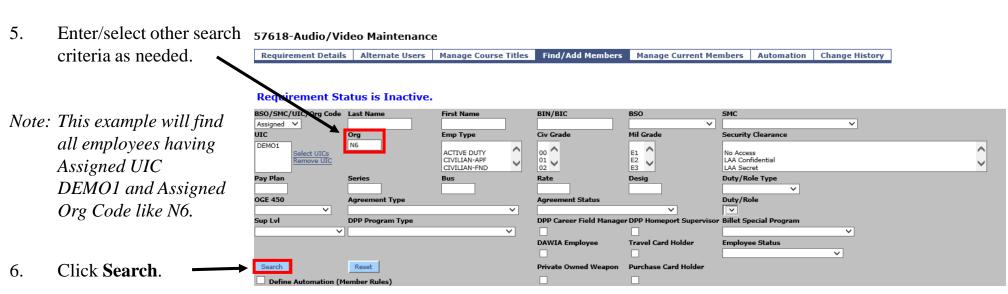
DEMO9

DEMO9

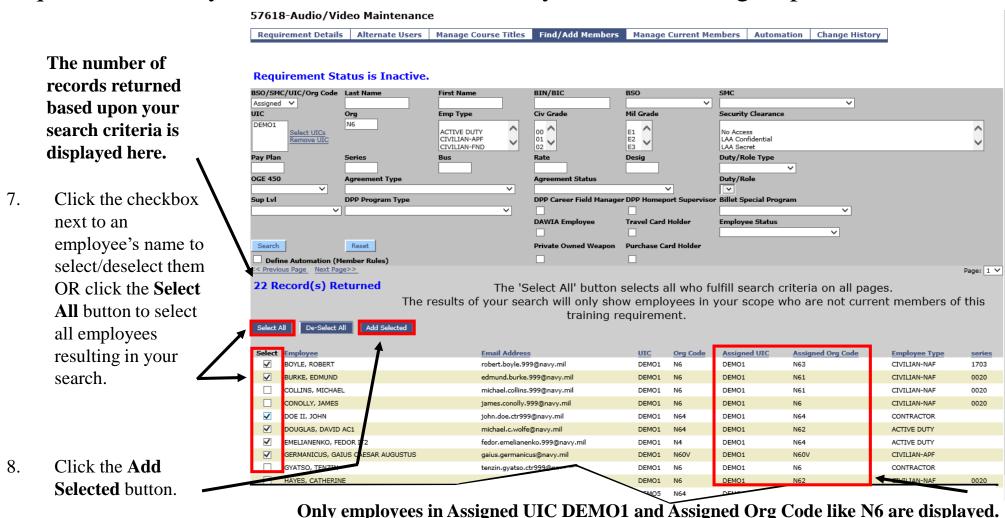
Page 1 of 1 Pages

Done

4. Click **Done** when finished.



You can now select the employees who are required to be a member of this training requirement. They can be selected individually or as an entire group.



Viewing Current Members

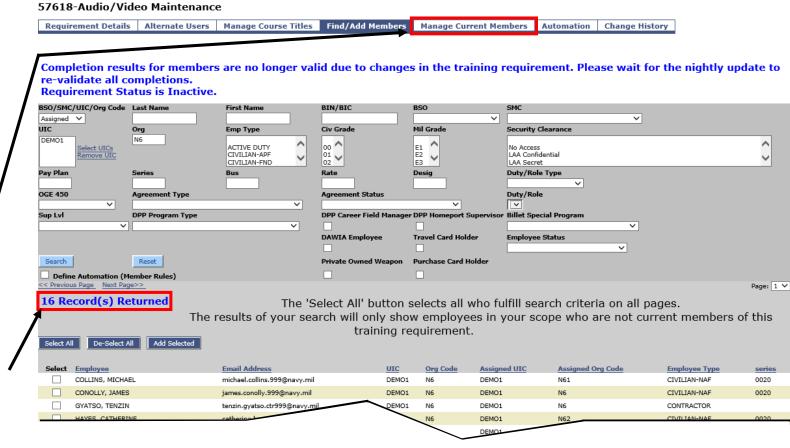
There are several things you can do regarding the selected members of a training requirement.

After members are added to a requirement, this message will be displayed on each tab.

To view the current members of a training requirement:

1. Click the Manage
Current Members
tab to view the
members who are
in the training
requirement.

The number of remaining records that have not been added to the training requirement is displayed here.



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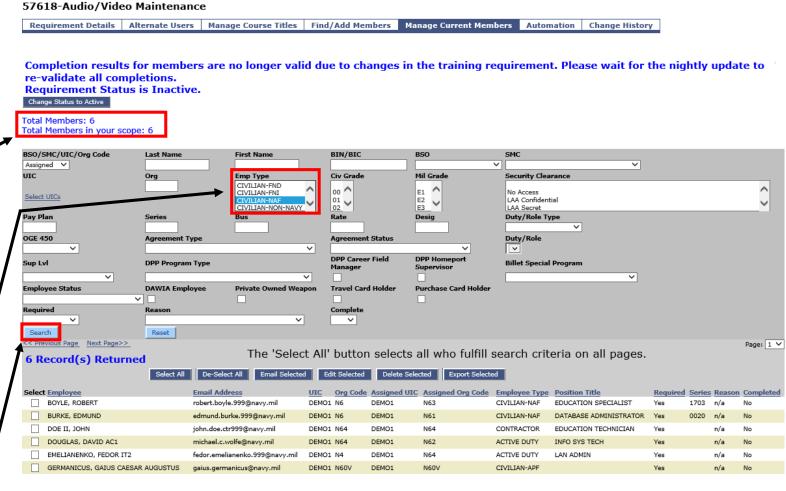
Searching Current Members

You can search for members in the training requirement by using any of the available search fields.

The total number of members and the total number of members that are in your scope in this training requirement are displayed here. These numbers may be different.

To search for members of a training requirement:

- 1. Enter your search criteria using the available fields. Here, only Civilian-NAF members will be searched.
- 2. Click **Search**.



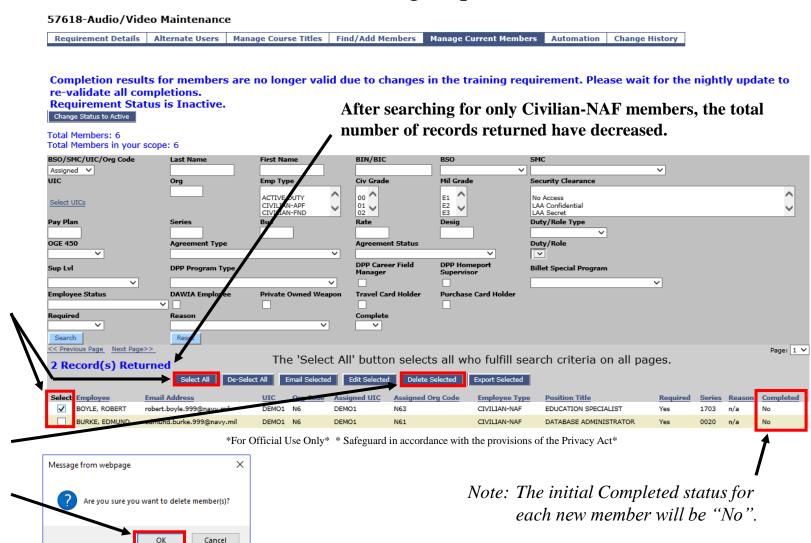
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Deleting Current Members

If necessary, you can delete members of the training requirement.

To delete members of a training requirement:

- 1. Click the checkbox next to a member to select/deselect them or click the **Select All** button to select all members.
- 2. Click the **Delete**Selected button
 to delete all
 selected
 members.
- 3. Click **OK**.

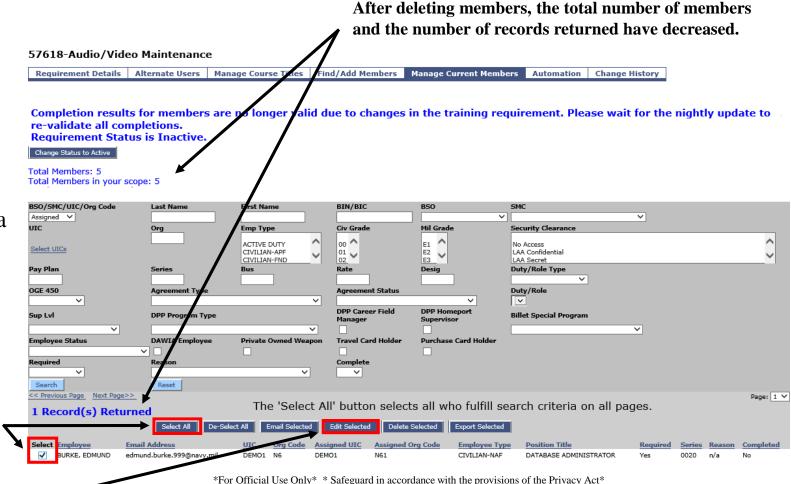


Editing the Details of Current Members

You can change whether or not a member of a requirement is required to complete the training requirement.

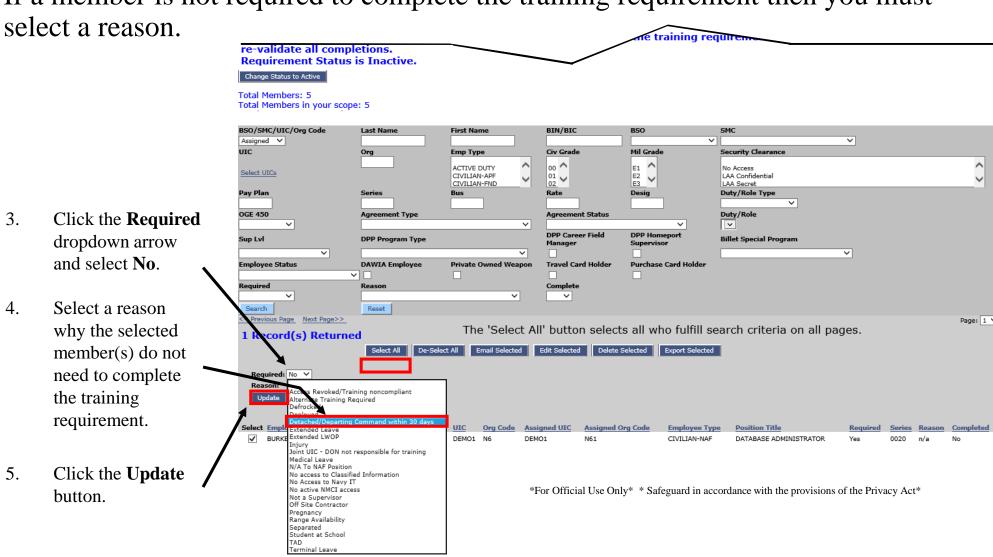
To edit the details of selected members of a training requirement:

- 1. Click the checkbox next to a member to select/deselect them or click the **Select All** button to select all members.
- Click the Edit Selected button.



Editing the Details of Current Members

If a member is not required to complete the training requirement then you must

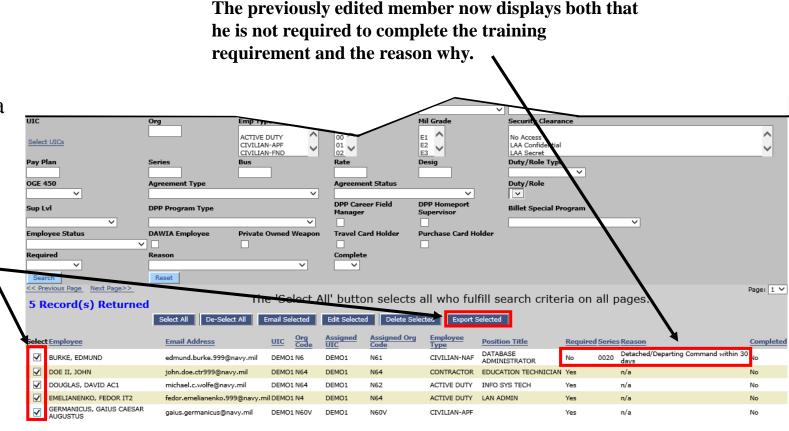


Exporting a List of Current Members

You can export a list of selected members of a training requirement.

To export the list of selected members of a training requirement:

1. After selecting the members click the **Export Selected** button.



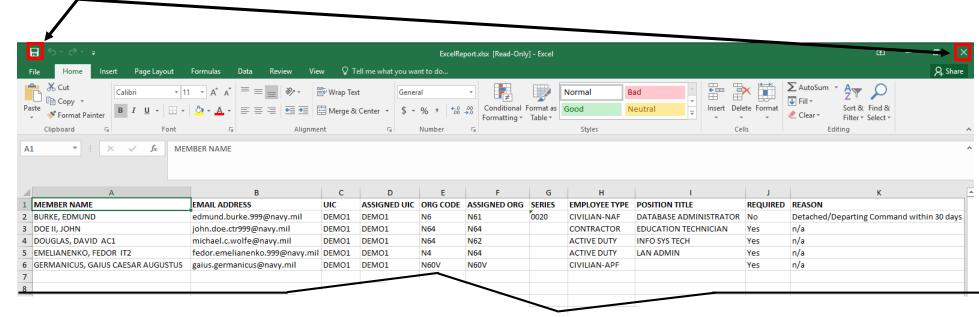
Exporting a List of Current Members

The list of selected employees and other relevant information will be displayed in an Excel spreadsheet. You can open or save this file for later use.

2. Click **Open** to view the list of selected employees or **Save** to view it at a later time.



3. If you opened the file then click the Save icon if you want to view this file at a later time or close the window.

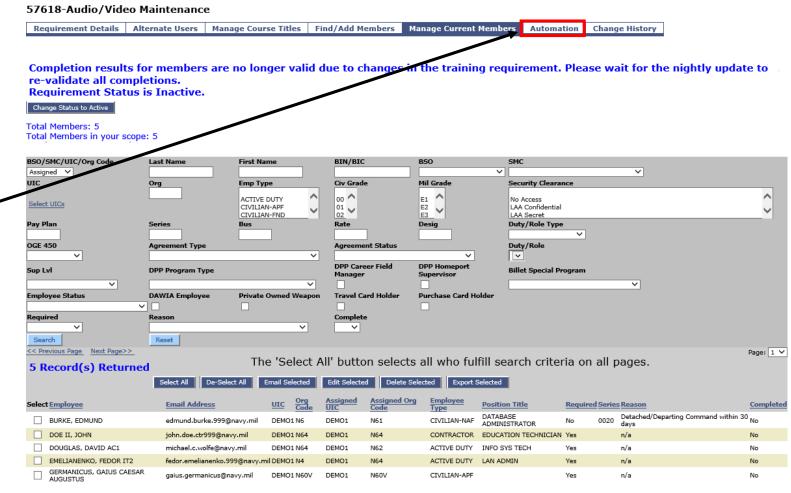


Viewing Automation

There are several ways you can automate how members are added or removed, when reminders will be sent, and how alternate users are added.

To view the automation of a training requirement:

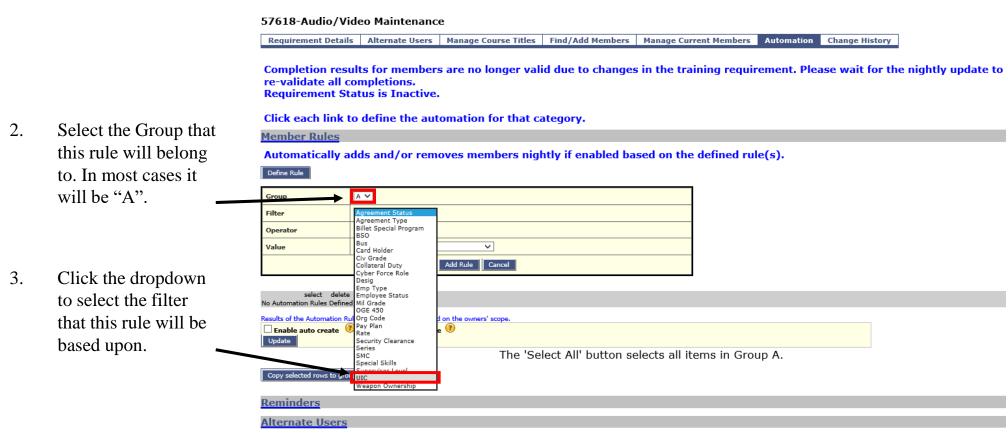
 Click the Automation tab.



There are three automation categories that can be managed for a training requirement: 1) Member Rules, 2) Reminders, and 3) Alternate Users. The Member Rules category is displayed by default.

To define the 57618-Audio/Video Maintenance Requirement Details Alternate Users Find/Add Members Manage Course Titles Manage Current Members automation rules for Completion results for members are no longer valid due to changes in the training requirement. Please wait for the nightly update to members of a re-validate all completions. Requirement Status is Inactive. training requirement: Click each link to define the automation for that category. Member Rules Click the **Define** Automatically adds and/or removes members nightly if enabled based on the defined rule(s). Rule button. select delete Results of the Automation Rules are further limited based on the owners' scope The 'Select All' button selects all items in Group A. Copy selected rows to group B Reminders Alternate Users

Generally, four pieces of data are required to define a rule. 1) a group, 2) a filter, 3) an operator, and 4) a value.



All rules are defined and processed based upon the shared scope of the owner of the training requirement.

- 3. Click the dropdown to define whether the rule for this UIC filter will be based upon the Official or Assigned UIC.
- 4. Click the dropdown to select the appropriate Operator for this rule.
- 5. Click the **Add UIC** button to select the value for this UIC filter.
- 6. If necessary, enter the UIC or part of the command name and click **Search**.
- 7. Select the UIC(s) from the resulting list and then click **Done** when finished.



Completion results for members are no longer valid due to changes in the training requirement. Please wait for the nightly update to re-validate all completions.

Requirement Status is Inactive.

Click each link to define the automation for that category.

Member Rules

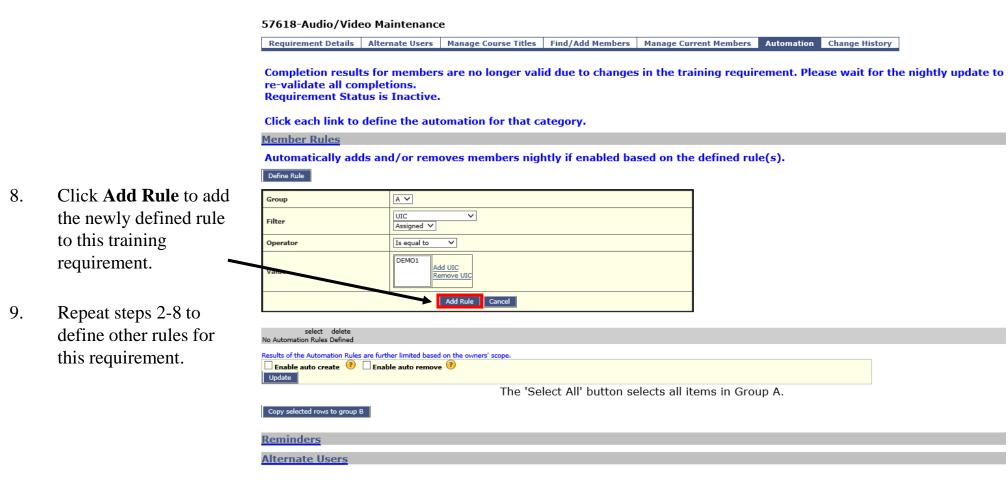
durantically adds and/or removes members nightly if enabled based on the defined rule(s).





The TWMS User ID of the owner of this training requirement is displayed here.
All rules are defined and enabled based upon the shared scope of this owner.

Other filters may require different data to complete before adding it.



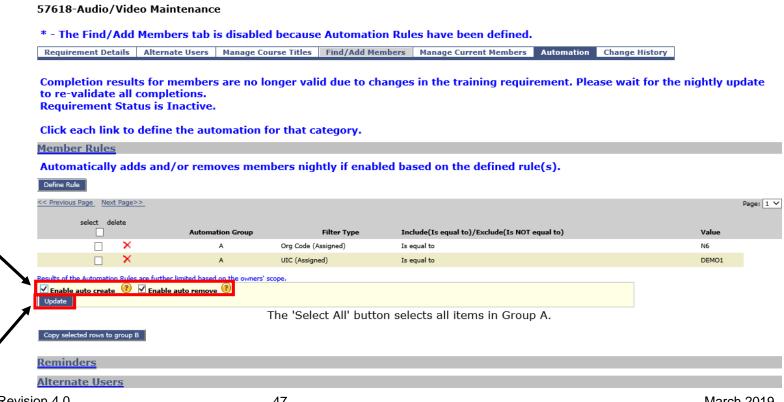
Enabling Automation – Member Rules

For TWMS to automatically add and remove members you must enable the defined rules. Once enabled, every night TWMS will add or remove members based upon the rules of the training requirement. If "Enable auto create" is selected TWMS will add employees to the training requirement who match the defined rules. If "Enable auto remove" is selected TWMS will remove employees from the training requirement who do not match the defined rules.

To enable the Member Rules of a training requirement:

Select one or both 1. checkboxes to enable the rule(s) that will add or remove members from this training requirement.

Click Update.



Auto-Defining Member Rules

Sometimes the Member Rules you will define will be the same as the search criteria you used for finding/adding members to the requirement. If so then TWMS can auto-define these Member Rules for you based upon this search criteria. These auto-defined rules will still need to be "turned on". Please refer to "Enabling Automation — Member Rules" discussed earlier in this guide for more information.

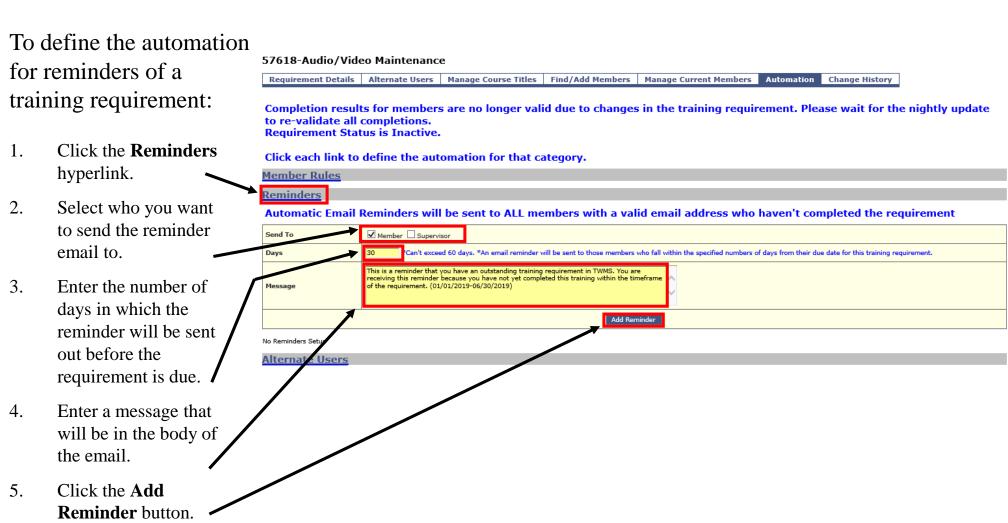
To auto-define the 57618-Audio/Video Maintenance Requirement Details Manage Course Titles Find/Add Members Manage Current Members Member Rules for a training requirement: Requirement Status is Inactive. BSO/SMC/UIC/Org Code Last Name \checkmark Security Clearance Emp Type N6 Select the checkbox to have TWMS Pay Plan Series automatically define OGE 450 Duty/Role your Automation Rules Sup Lvl based upon your Employee Status current search criteria. Define Automation (Member Rules) Click Search

Note: This example will find all employees

having Assigned UIC DEMO1 and Assigned Org Code equal to N6.

Defining Automation – Reminders

Email reminders can be automatically sent based upon the criteria you have defined.



Defining Automation – Reminders

This reminder will send an email to all members 30 days before the due date of the training requirement.

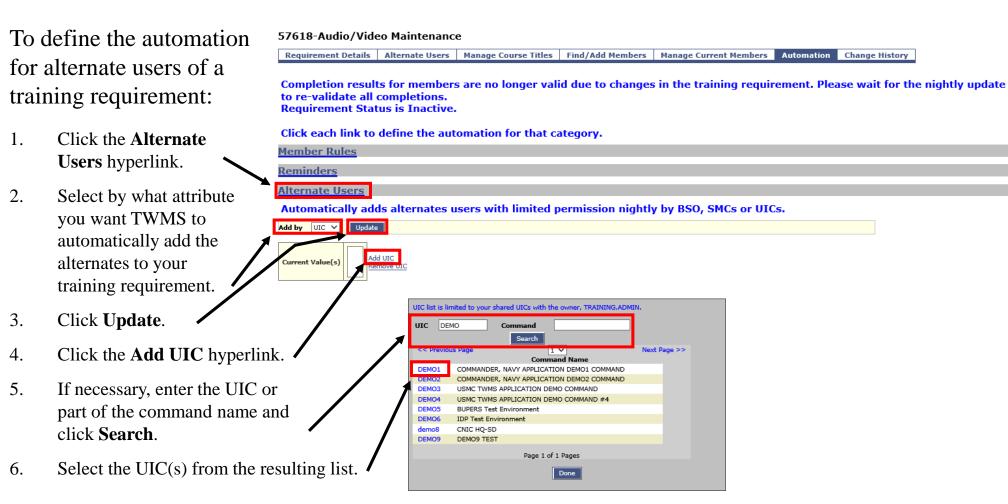
57618-Audio/Video Maintenance

Alternate Users Manage Course Titles Find/Add Members Manage Current Members Completion results for members are no longer valid due to changes in the training requirement. Please wait for the nightly update to re-validate all completions. Requirement Status is Inactive. Click each link to define the automation for that category. Repeat steps 2-5 to add Member Rules other reminders. Reminders Automatic Email Reminders will be sent to ALL members with a valid email address who haven't completed the requirement Member Supervisor Days Message Add Reminder This is a reminder that you have an outstanding training requirement in TWMS. You are receiving this reminder because you have not yet completed this training within the timeframe of the requirement, (01/01/2019-06/30/2019) Alternate Users The reminder previously added is now displayed.

6.

Defining Automation – Alternate Users

Alternate users of a training requirement can be automatically added based upon the BSO, SMC(s), or UIC(s) you have selected. You will only be able to select those within your BSO.



Defining Automation – Alternate Users

Only users who have active TWMS accounts and the Training Requirements privilege matching the selected attribute and value(s) will be automatically added as alternate users to the training requirement.

- 7. Repeat steps 5-6 to add other UICs.
- 8. Click **Done** when finished.



57618-Audio/Video Maintenance

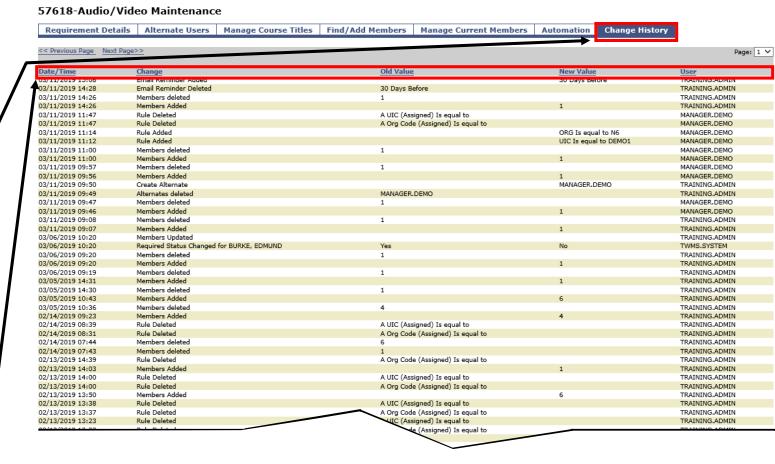
Manage Course Titles Find/Add Members | Manage Current Members Completion results for members are no longer valid due to changes in the training requirement. Please wait for the nightly update to re-validate all completions. Requirement Status is Inactive. Click each link to define the automation for that category. Member Rules TWMS will use this Reminders criteria to automatically Alternate Users add alternate users to the Automatically adds alternates users with limited permission nightly by BSO, SMCs or UICs. training requirement. Add by UIC V Update Current Value(s)

Viewing Change History

Most relevant changes to a training requirement can be viewed so you can determine how and when a particular change took place. By default, the most recent changes are displayed first but you can sort the changes by any of the column headers.

To view the history of changes for a training requirement:

- Click the Change History tab.
- 2. Click any of the column header hyperlinks to change the sort order by that column. Clicking the same hyperlink a second time will change the displayed order from ascending to descending order or from descending to ascending order.



Activating a Training Requirement

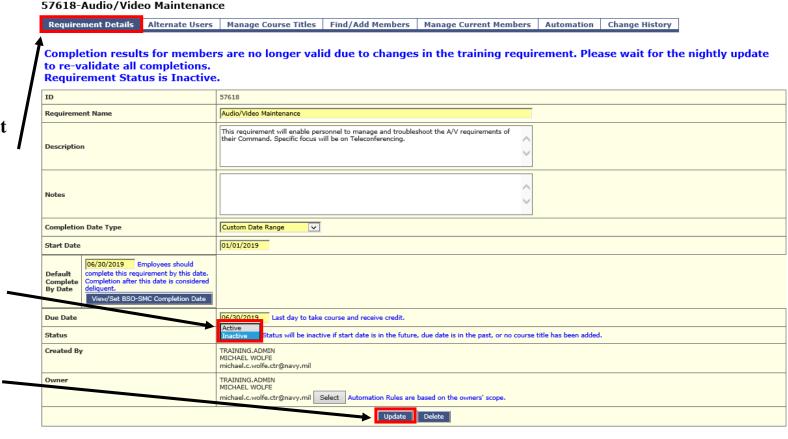
All the topics previously discussed were applied to an Inactive training requirement. The status of your training requirement can be changed to "Active" if all of the following conditions are met: 1) the start date is in the past, 2) the due date is in the future, and 3) at least one valid course title has been selected.

To activate a training requirement:

Method 1

 Click the Requirement Details tab.

- Click the dropdown and select **Active**.
- 3. Click the **Update** button.

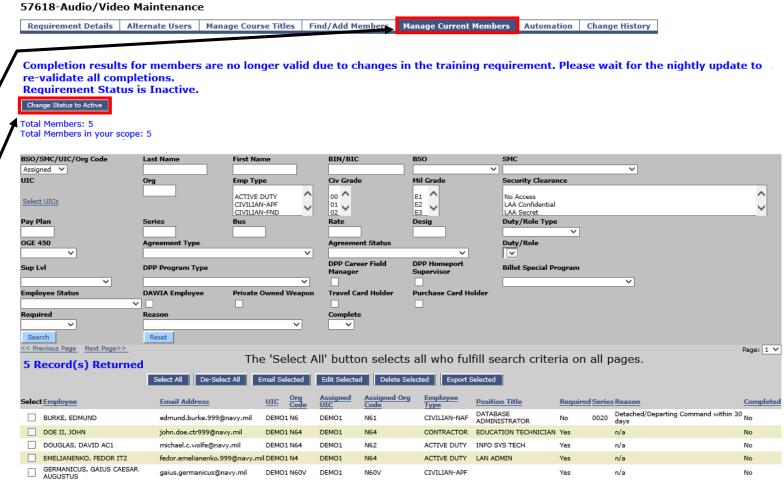


Activating a Training Requirement

Alternatively, you can also activate a training requirement from the Manage Current Members tab.

Method 2

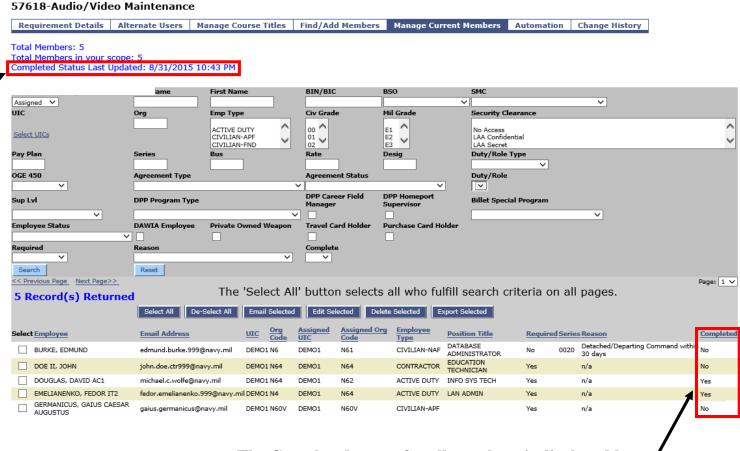
- Click the
 Manage Current
 Members tab.
- Click the "Change Status to Active" button.



Understanding the Completed Status

During the lifespan of all active training requirements, the nightly TWMS update process will validate the Completed status for all members in the requirement.

A date and time stamp always displays the most recent update.



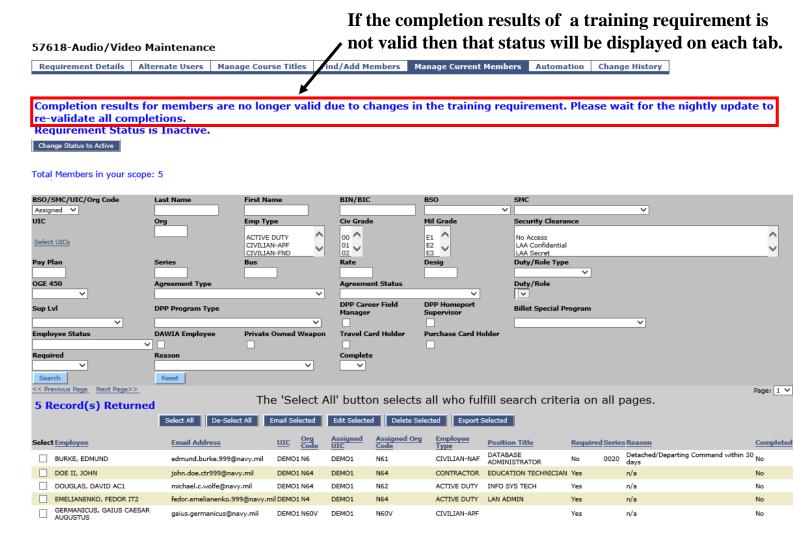
The Completed status for all members is displayed here.

Understanding the Completed Status

Noted below are the three reasons why the completion results for members of a training requirement may not be valid from its most recent update.

Completion results may not be valid if:

- The Date Type or Date Range in the Requirement Details tab was updated.
- 2) Course titles were added or deleted or the groupings of course titles selected for the training requirement was updated.
- Members were added to the training requirement.



Emailing Current Members

Emailing selected members allows you to communicate specific information regarding the training requirement.

57618-Audio/Video Maintenance

Requirement Details Alternate Users Manage Course Titles Find/Add Members Manage Current Members Automation Completion results for members are no longer valid due to changes in the training requirement. Please wait for the nightly update to re-validate all completions. Requirement Status is Inactive. Change Status to Active To send an email to Total Members: 5 Total Members in your scope: 5 selected members of a BSO/SMC/UIC/Org Code First Name BIN/BIC BSO training requirement: Assigned V Civ Grade Mil Grade Security Clearance Emp Type ACTIVE DUTY No Access Select UICs CIVILIAN-APF LAA Confidential CIVILIAN-FND LAA Secret Pay Plan Duty/Role Type Desig Search for and OGE 450 Duty/Role select the DPP Career Field DPP Homeport Sup Lvl Billet Special Program DPP Program Type members you mployee Status **DAWIA Employee Private Owned Weapon** want to send an email to. Reset Page: 1 V The 'Select All' button selects all who fulfill search criteria on all pages. 5 Record(s) Returned Email Selected Select Employee Position Title Detached/Departing Command within 30 BURKE, EDMUND DEMO1 N6 DEMO1 N61 CIVILIAN-NAF Click the Email DOE II, JOHN DEMO1 N64 DEMO1 N64 EDUCATION TECHNICIAN Yes michael.c.wolfe@navv.mil DEMO1 N64 DEMO1 N62 ACTIVE DUTY n/a Yes **Selected** button. n/a DEMO1 N64 ACTIVE DUTY I AN ADMIN DEMO1 N60V CIVILIAN-APP gaius.germanicus@navv.mil DEMO1 N60V

Emailing Current Members

The default reply email address is the person who is currently logged into TWMS. The default message details information about the current training requirement. You can change this message as needed.



Click Send.

N62

N64

DEMO1

DEMO1

training. These are

selected by default.

gaius.germanicus@navy.mil

DEMO1 N64

DOUGLAS, DAVID AC1

EMELIANENKO, FEDOR IT2

GERMANICUS, GAIUS CAESAR

Yes

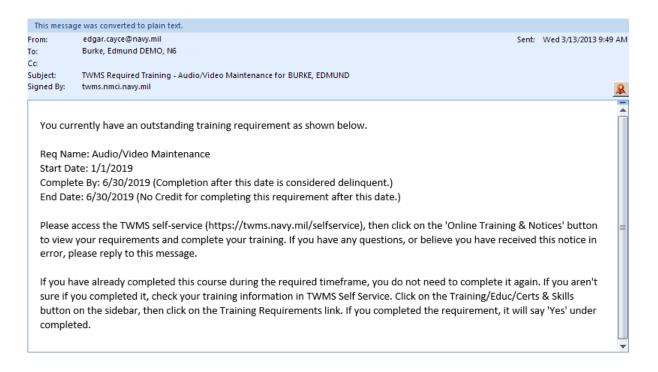
n/a

INFO SYS TECH

CIVILIAN-APF

Emailing Current Members

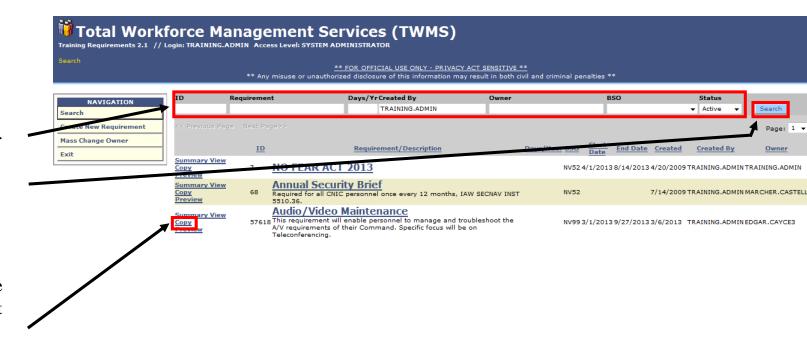
Below is a sample email that is sent to each selected member. Please note that the name of the training requirement is included in the subject line of the email. The body of the email was not changed from the default message. It is recommended to always include the self-service link in the email you send to members.



TWMS allows you to create a new training requirement by copying one or more attributes of an existing one.

To copy a training requirement:

- Enter your search criteria to find an existing training requirement to copy.
- Click Search.
- 3. Click the **Copy**hyperlink
 corresponding to the
 training requirement
 you want to copy.



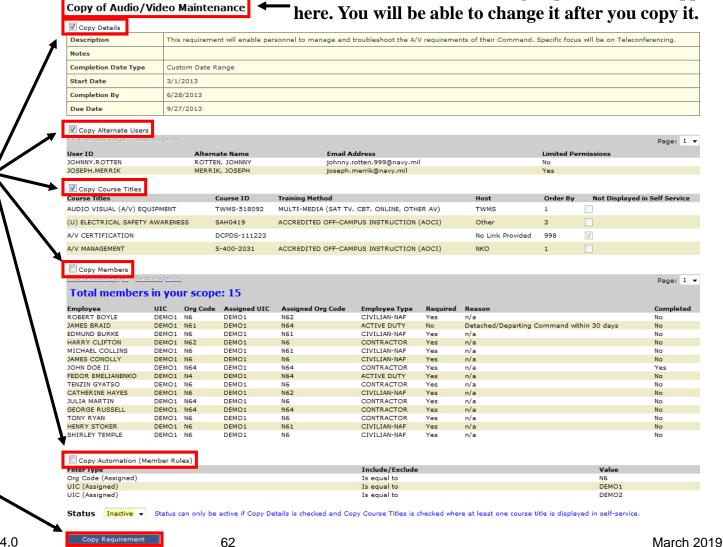
Select the attributes you would like to copy from the existing training requirement

to the new one you are creating.

4. Select the checkboxes for each attribute of the existing training requirement you want to copy to your new training requirement.

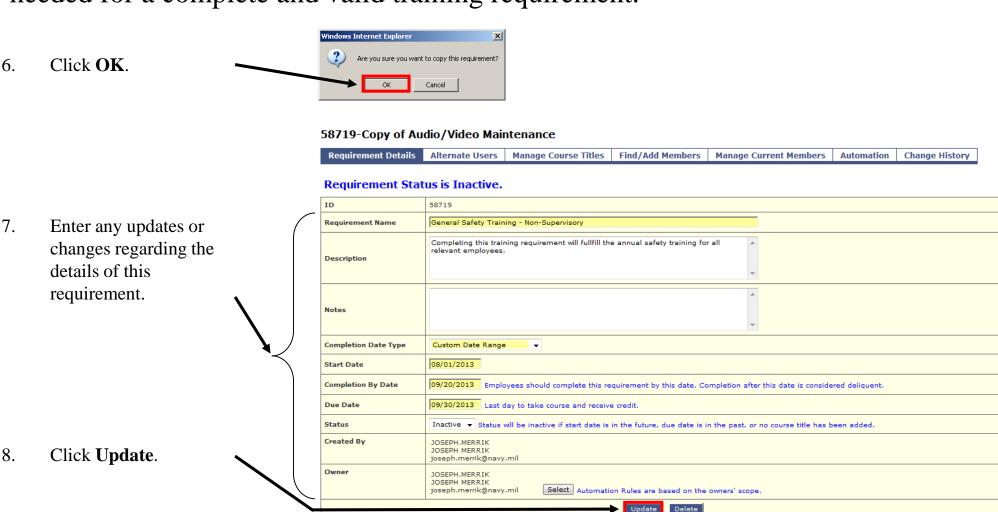
Note: Only those members or rules that are within your scope of access will be displayed.

5. Click Copy Requirement.



The new name of the training requirement will appear

After copying your new training requirement you can now provide all the details needed for a complete and valid training requirement.

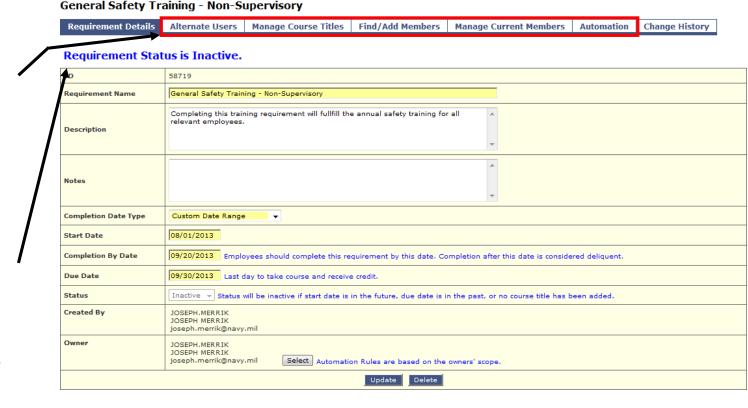


Continue to enter the other details of this new training requirement. Refer to "Creating a Training Requirement" discussed earlier in this guide for more information. Your requirement will also have a new Training Requirement ID.

Click the other tabs in any order to add alternates, manage course titles, find/add members, etc.

Note: Remember, the status of your training requirement will remain "Inactive" if one of three conditions are met.

- 1) The start date is in the future.
- 2) The due date is in the past.
- 3) There are no course titles selected.



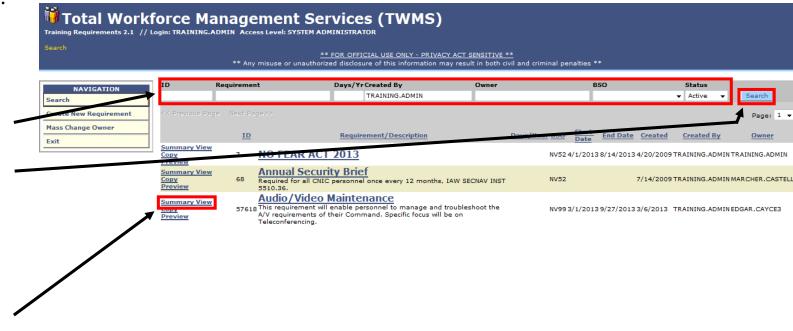
Summary View

TWMS allows you to view all the relevant details of training requirement in a summary format.

To view the summary of

a training requirement:

- Enter your search criteria to find an existing training requirement to copy.
- 2. Click **Search**.
- 3. Click the **Summary View** hyperlink
 corresponding to the
 training requirement
 you want to view.



Summary View

Audio/Video Maintenance

Automation Rules

UIC (Assigned)

UIC (Assigned)

Org Code (Assigned)

Filter Type

Requirement Details							
Description	This requirement will enable personnel to manage and troubleshoot the A/V requirements of their Command. Specific focus will be on Teleconferencing.						
Notes							
Completion Date Type	Custom Date Range						
Year							
Start Date	3/1/2013						
Completion By	6/28/2013						
Due Date	9/27/2013						
Status	Active						

Alternate Users					
<< Previous Page Next Page>>					Page: 1 ▼
User ID	Alternate Name	Email Address		Limited Pe	rmissions
JOHNNY.ROTTEN	ROTTEN, JOHNNY	johnny.rotten.999@navy.mil		No	
JOSEPH.MERRIK	MERRIK, JOSEPH	joseph.merrik@navy.mil		Yes	
Course Titles					
Course Titles	Course ID	Training Method	Host	Order By	Not Displayed in Self Service
AUDIO VISUAL (A/V) EQUIPMENT	TWMS-518092	MULTI-MEDIA (SAT TV, CBT, ONLINE, OTHER AV)	TWMS	1	
(U) ELECTRICAL SAFETY AWARENESS	SAH0419	ACCREDITED OFF-CAMPUS INSTRUCTION (AOCI)	Other	3	
A/V CERTIFICATION	DCPDS-111223		No Link Provided	998	✓
A/V MANAGEMENT	S-400-2031	ACCREDITED OFF-CAMPUS INSTRUCTION (AOCI)	NKO	1	

<< Previous Page Nex	d Page>>	_						Page: 1		
Total members in your scope: 15										
Employee	UIC	Org Code	Assigned UIC	Assigned Org Code	Employee Type	Required	Reason	Completed		
ROBERT BOYLE	DEMO1	N6	DEMO1	N62	CIVILIAN-NAF	Yes	n/a	No		
JAMES BRAID	DEMO1	N61	DEMO1	N64	ACTIVE DUTY	No	Detached/Departing Command within 30 days	No		
EDMUND BURKE	DEMO1	N6	DEMO1	N61	CIVILIAN-NAF	Yes	n/a	No		
HARRY CLIFTON	DEMO1	N62	DEMO1	N6	CONTRACTOR	Yes	n/a	No		
MICHAEL COLLINS	DEMO1	N6	DEMO1	N61	CIVILIAN-NAF	Yes	n/a	No		
JAMES CONOLLY	DEMO1	N6	DEMO1	N6	CIVILIAN-NAF	Yes	n/a	No		
JOHN DOE II	DEMO1	N64	DEMO1	N64	CONTRACTOR	Yes	n/a	Yes		
FEDOR EMELIANENKO	DEMO1	N4	DEMO1	N64	ACTIVE DUTY	Yes	n/a	No		
TENZIN GYATSO	DEMO1	N6	DEMO1	N6	CONTRACTOR	Yes	n/a	No		
CATHERINE HAYES	DEMO1	N6	DEMO1	N62	CIVILIAN-NAF	Yes	n/a	No		
JULIA MARTIN	DEMO1	N64	DEMO1	N6	CONTRACTOR	Yes	n/a	No		
GEORGE RUSSELL	DEMO1	N64	DEMO1	N64	CONTRACTOR	Yes	n/a	No		
TONY RYAN	DEMO1	N6	DEMO1	N6	CONTRACTOR	Yes	n/a	No		
HENRY STOKER	DEMO1	N6	DEMO1	N61	CIVILIAN-NAF	Yes	n/a	No		
SHIRLEY TEMPLE	DEMO1	N6	DEMO1	N6	CIVILIAN-NAF	Yes	n/a	No		

Include/Exclude

Is equal to

Is equal to

Is equal to

All the details of this requirement are compressed into one form for easy viewing.

Note: Only those members and automation rules that are within your scope of access will be displayed.

Value

DEMO1 DEMO2

Previewing a Training Requirement

TWMS allows you to preview how the selected training requirements will display for a member from their self-service. You will only be able to preview training requirements of those in which you are the creator, owner, or an alternate.

To preview a training requirement:

- 1. Enter your search criteria to find an existing training requirement to preview.
- Click Search.
- 3. Click the **Preview**hyperlink
 corresponding to the
 training requirement
 you want to preview.

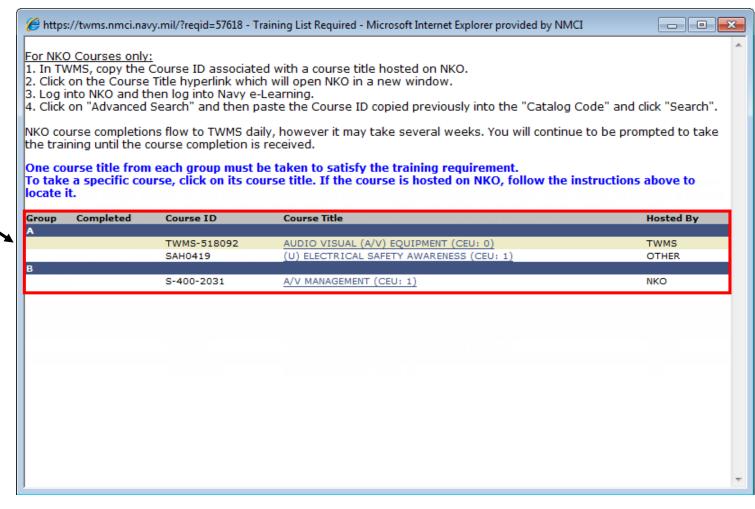


Previewing a Training Requirement

Previewing a training requirement is useful to ensure it is displaying as expected and that all hyperlinks are working correctly.

Completing one course from Group B will satisfy this training requirement.

Note: Only course titles having online content associated with them are displayed in self-service.

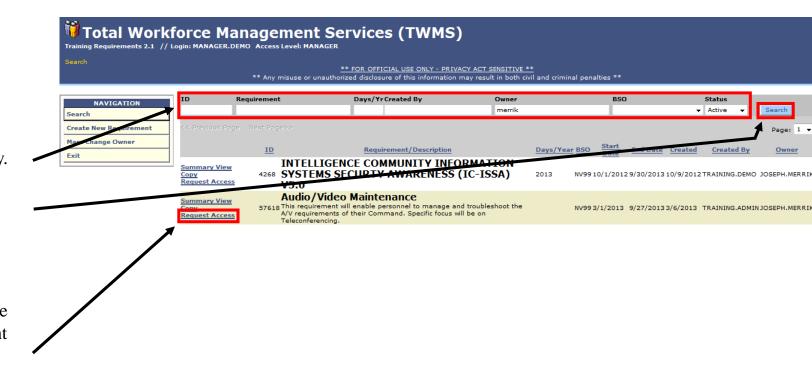


Requesting Access to a Training Requirement

TWMS allows you to request access to another training requirement for your use. If your request is approved then you will be an alternate of that requirement with limited permissions.

To request access to another training requirement:

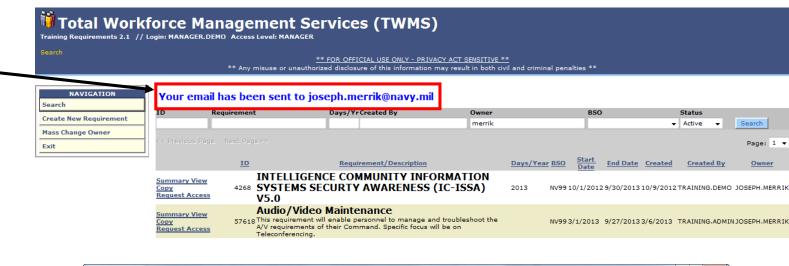
- 1. Enter your search criteria to find an existing training requirement to copy.
- 2. Click **Search**.
- 3. Click the **Request**Access hyperlink
 corresponding to the
 training requirement
 you want to access.



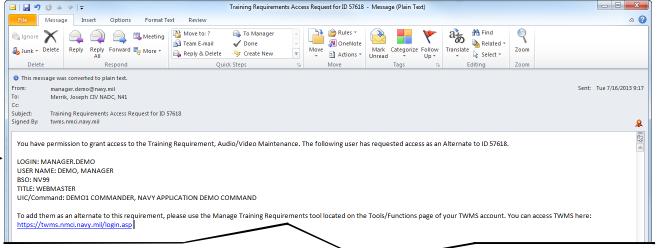
Requesting Access to a Training Requirement

You will only be able to request access to the training requirements in which you are already not the creator, owner, or an alternate of.

Feedback that an email was sent is displayed here.



This is an example of an email that is received when a request is sent.



Mass Change Owner

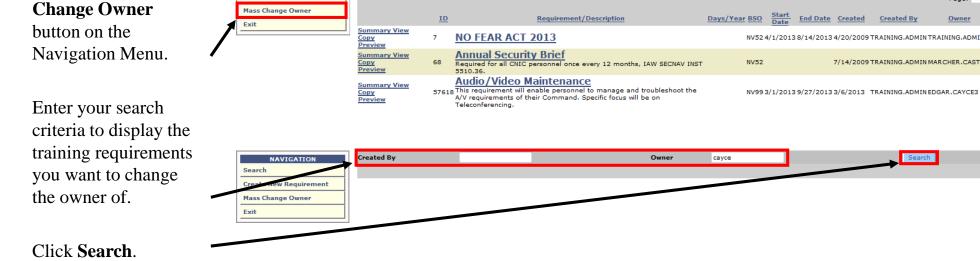
TWMS allows you to mass change the owner of several training requirements to another owner that you select. A new owner is often needed because the previous owner has separated or changed commands. You will only be able to make this mass change to a training requirement if you are the creator, current owner, or an alternate with full permissions.

🎁 Total Workforce Management Services (TWMS)

Create New Requirement

To mass change the owner of more than one training requirement:

- Click the Mass **Change Owner** button on the Navigation Menu.
- Enter your search you want to change the owner of.



TRAINING.ADMIN

→ Active

Search

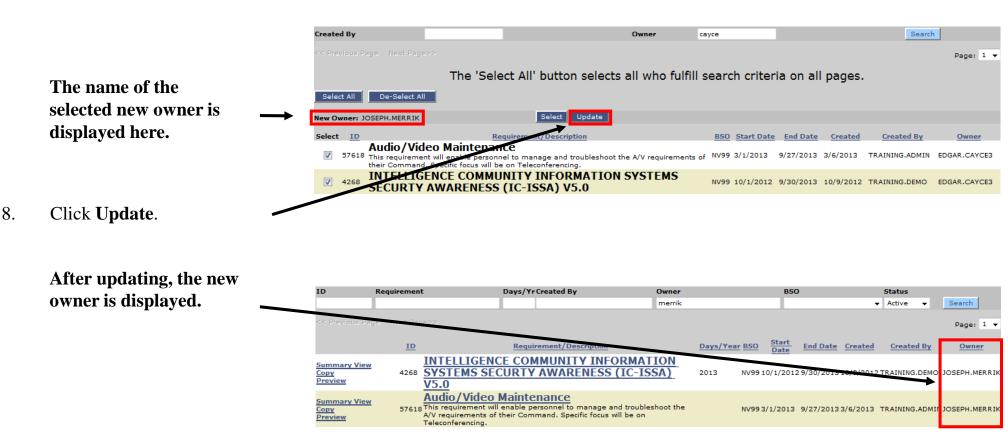
Mass Change Owner

- 4. Select the training requirements you want to change the owner of. You can select them individually or click the **Select All** button.
- 5. Click the **Select** button to search for the new owner.
- 6. Enter your search criteria and then click **Search**.
- 7. Select the hyperlink of the listed employee to add as the Owner.



Mass Change Owner

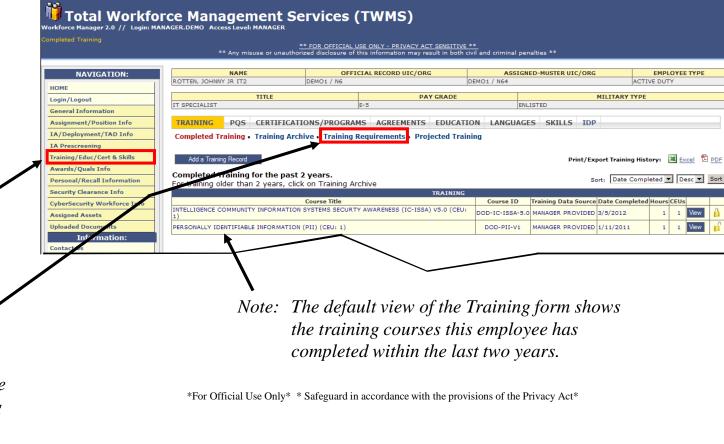
Remember that the Automation Rules may be affected by changing owners.



Information about an employee's required training can be managed and viewed in the employee's training form.

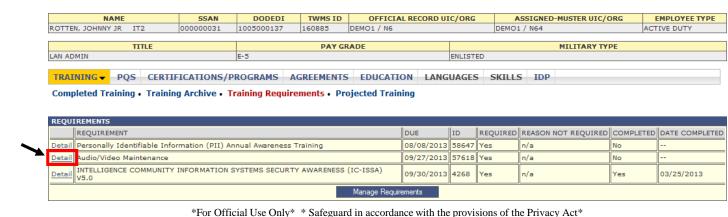
To view required training for an employee*:

- Donce an employee has been selected, click the **Training/Educ/Cert & Skills** button to display the Completed Training form shown here.
- Click **Training Requirements** to display the required courses for this employee.
 - * You must have the appropriate privileges to view the training information for an employee.



All requirements for this employee will be listed as shown below. Additional details of each of the required courses can be viewed here.

- 3. Click the **Detail** hyperlink to view other information about the selected training requirement.
- 4. Details of the selected training requirement will be displayed in this new window including the list of courses that will satisfy the requirement. Close this window when you are finished.





If you have the appropriate privileges, you can manage an individual's training requirements by adding or removing them.

To manage a training requirement for an individual employee*:

- 1. From the Training
 Requirements form of the
 employee's training record,
 click **Manage Requirements**.
- 2. Click the **Edit** hyperlink corresponding to the training requirement you want to make changes to.
 - * You must have the appropriate privilege to view the training information for an employee.



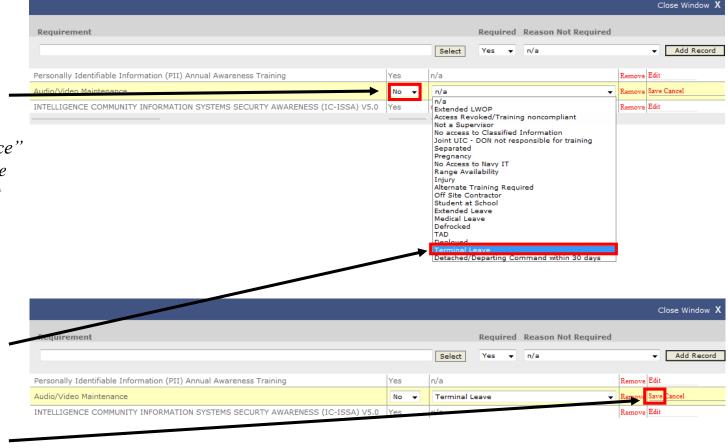


If a training requirement is selected then you can remove it or edit whether the employee is required to complete it.

3. Click the first dropdown arrow and choose **No**. This indicates that this requirement is not required for this employee.

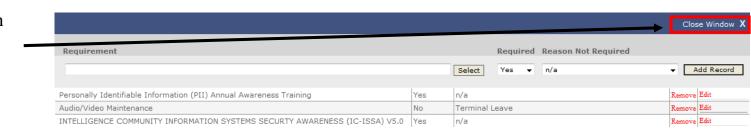
Note: The "Audio/Video Maintenance" training requirement is the one that has been used throughout this guide.

- 4. Click the second drop down arrow and select the appropriate reason why this training requirement is not required for this employee.
- 5. Click **Save** to accept these changes or **Cancel** to disregard them.



Changing or editing the details of a training requirement for an individual employee is identical to changing or editing the details of a member using the Manage Training Requirements module from the Tools/Functions area of TWMS.

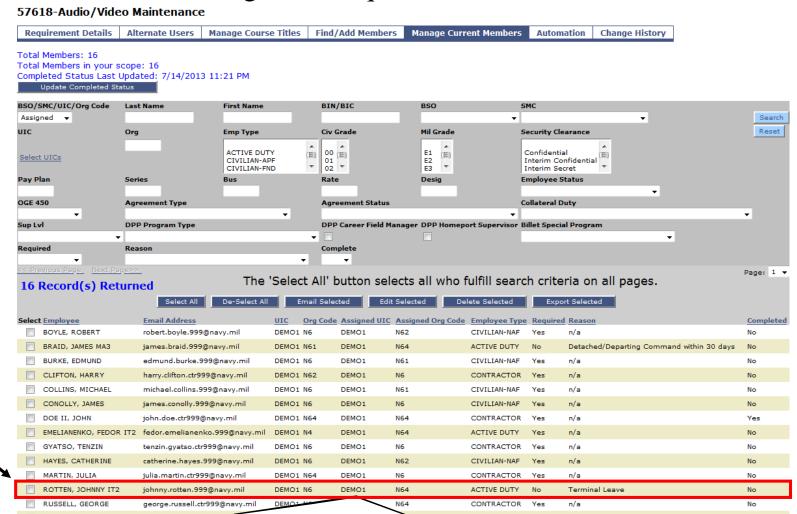
6. Click **Close Window** when you are finished.



Note: The Training Requirements form for the employee now shows that this requirement is not required and displays the reason not required.



Returning to the Manage Current Members tab of this training requirement also shows for this member that the training is not required.



The required status and the reason why it isn't required for this member is also displayed here.