The Digital Training Management System: Preparatory Functions

Instructor Guide

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

Table of Contents

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

Purpose

This guide provides instructors of the Digital Training Management System (DTMS) with instructional information about **DTMS Preparatory Functions.** This training unit is designed for DTMS operators and is a sequential unit that scaffolds previous knowledge with practical application to develop and refine previous and existing skills. This guide provides instructors the course design and strategy to allow instructors to achieve the instructional goals and unit learning outcomes.

Context

The DTMS Course is designed instruction consisting of 80-hours: 40 independent practicum hours and 40-hours in a classroom learning environment. During this course, learners will be given the opportunity to test their knowledge through hands-on system demonstrations and Student Workbook activities. After completion of this course, learners will possess the requisite skills and knowledge to manage unit training in your organization.

The Preparatory Functions are necessary to properly use DTMS to its fullest potential. There are certain functions in DTMS that need to be setup prior to attempting to perform other functions. Items such as Locations and Signature Blocks are necessary for developing proper training schedules. Platoon Manager allows the building of subordinate units to better manage personnel records at the platoon or below levels. User Management will primarily be used by Managers to give users at all levels access to DTMS.

During this lesson, instructors will demonstrate to learners the following DTMS functions:

- Locations
- Platoon Manager
- Signature Blocks
- User Management Overview
- Manage Personnel

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

Learning Objectives

- Properly add, edit, and/or assign training locations in the DTMS

- DTMS Operator(s) effectively demonstrate the ability to add, remove, assign platoon personnel in the DTMS.

- DTMS Operator(s) demonstrate the management of personnel, signature blocks, users, and personnel in the DTMS.

- Demonstrate proper data pull to manage reports and unit training proficiency statuses without error.

Instructional Event Sequencing

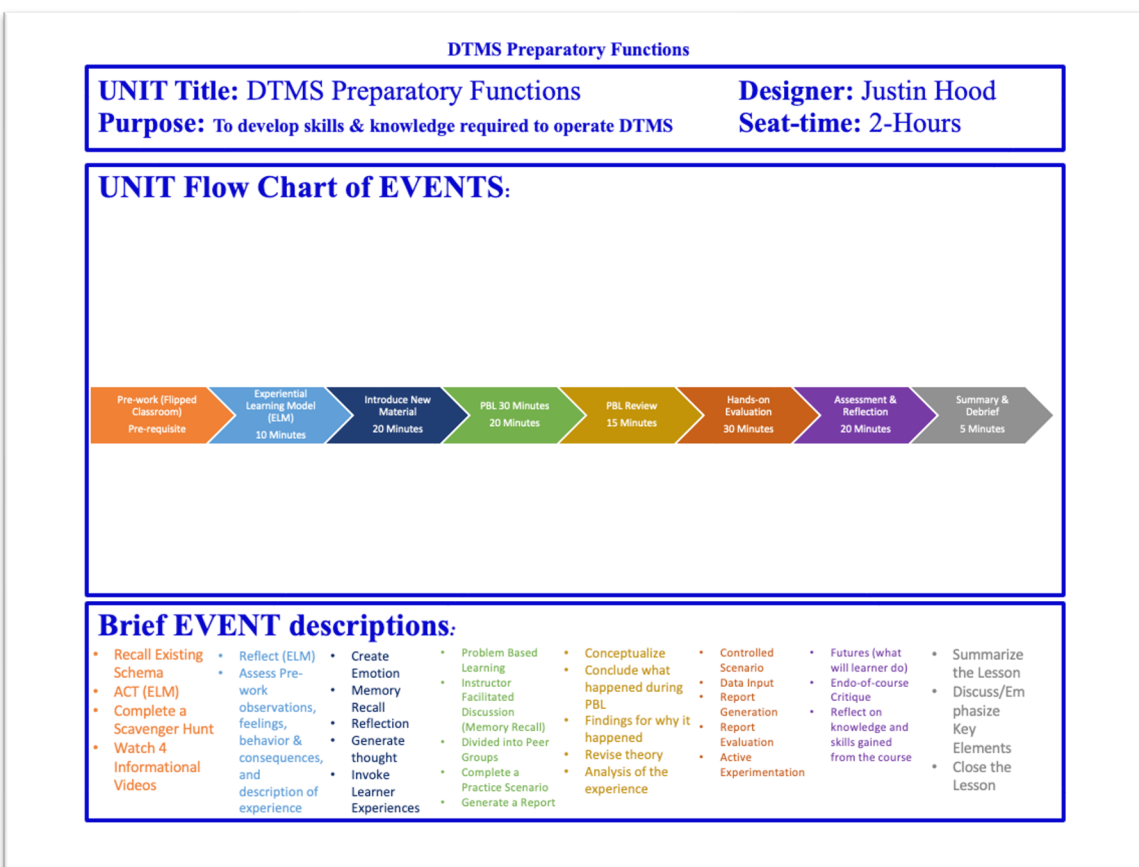This designed instruction for DTMS Preparatory Functions is sequenced as follows:

Figure 1: Sequence of Events

INSTRUCTOR GUIDE

This instructional unit is designed using Kolb's Experiential Learning Model (ELM) and Merrill's First Principles of Instruction:
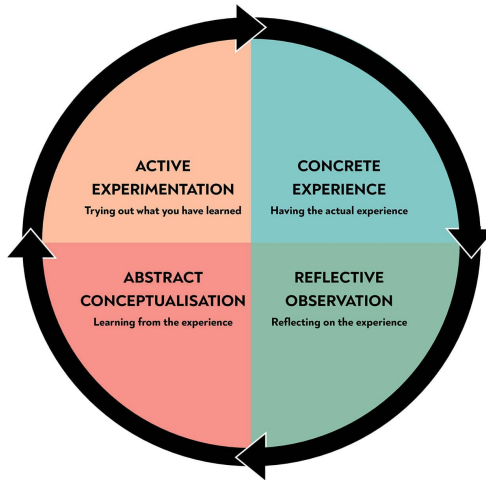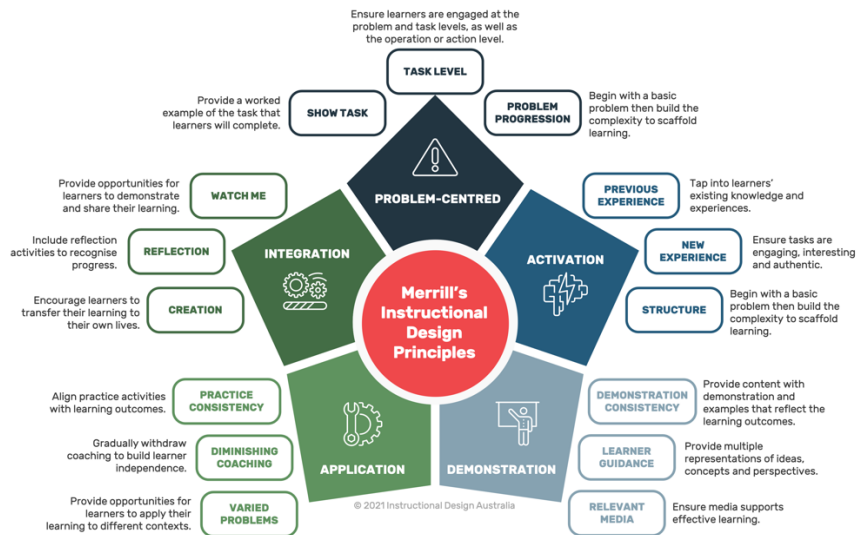

Figure 2: Kolb's ELM Model

Figure 3: Merrill's First Principles

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

The DTMS system requires both knowledge and skills to manage and operate effectively. As such, this course is designed by building on users existing knowledge and skills about computers and like computer programs (existing knowledge) while allowing users to internalize and rationalize the similarities, differences, and nuances to operate the DTMS properly and effectively. Like most systems in which there are several different ways to accomplish tasks, the same is true about the DTMS. However, for the DTMS to produce reports with necessary and required data requires users to enter critical and essential data in the required fields. By design, this course will provide and demonstrate to users the knowledge of the required fields in the DTMS while allowing learners to practice and develop their data entry skills, processes, and procedures to operate the DTMS.

Instructional Phases & Schedule

Prework: In the pre-work portion of this unit, Learners are provided a tablet, scavenger hunt, and practical exercise. Before learners attend the classroom portion of this instruction, they are required to view the four videos provided to them on their tablet, all while completing the Scavenger Hunt and practical exercise.

ELM (10 - min.): The classroom portion will begin with the instructor applying the Experiential Learning Model to allow learners to reflect on their pre-work. While learners are reflecting on pre-work, the instructor will guide the discussion towards learners' assessment of their pre-work observations, feelings, behaviors & consequences, and the learner's description of their experience.

Intro (20 – min.): The introduction phase of this instruction is where the instructor will begin to introduce new material to the learners. During the introduction of new material, the instructor will guide the learners to create emotion, memory recall, reflect, generate thought, and invoke learner experiences.

Problem Based Learning Practical Exercise (30 – min.): The Problem Based Learning portion of this designed instruction is where learners will begin to transfer and apply new knowledge towards applicable skills. Learners are divided

into groups of no more than four and provided a practical exercise (PE) that collectively, they will collaborate and complete. The instructor will navigate around the groups to interact with learners and provide insight to facilitate learning. After completing the PE learners will generate a report from the DTMS as directed in the PE and be prepared to collectively discuss their report details during the next phase – PBL review.

Problem Based Learning Practical Exercise Review (10 – min): During the PBL review phase, the instructor will guide the learners to conceptualize their events and actions during the PE. While facilitating the discussion, the instructor will direct the discussion to allow the learners to conclude what happened during the PE, findings for why what happened, happened, to revise their theory, and to analyze their experience.

Hands on Evaluation (30 – min.): The hands-on evaluation assesses the learner's knowledge and skill to apply the new knowledge introduced. It consists of a controlled scenario that protects the integrity of the assessment and prevents cheating. After receiving an evaluation scenario, learners are required to input data into the DTMS and generate a report that they will provide the instructor which indicates the learner's completion of the assessment. This assessment allows learners to use active experimentation to generate and complete and accurate report that matches each controlled scenarios requisite answer key.

Assessment & Reflection (20 – min.): The assessment & reflection phase is designed to allow learners to reflect and analyze their future use of the DTMS while answering an end-of-course critique to provide feedback used to enhance the course. The instructor content points include the instructor facilitating a group discussion that provides feedback about the course/instructional unit,

summarizing the lesson and emphasizing key points, learners reflecting on their knowledge and skills gained, and closure of the lesson.

Instructor Notes:

- Introduce yourself and describe your professional experiences in DTMS. Introduce members of your team (alternate instructors/facilitators).
- Have each learner introduce themselves to include each learners rank & name, unit assigned, and duty position.

U.S. Army Combined Arms Center SOLDIERS AND LEADERS - OUR ASYMMETRIC ADVANTAGE	**Terminal Learning Objective**

Action: Demonstrate Operator Level Functionality Using the Digital Training Management System

Conditions: The Digital Training Management System (DTMS) is the Army's Learning Management System (LMS) for recording individual, unit, and organizational training. Preparatory Functions are the essential functions that serve as the foundation for every other DTMS function. The DTMS preparatory functions unit is an in-course unit designed to allow learners to recall previous knowledge about navigating Army systems while using their previous knowledge and scaffold that knowledge to increase their skills, knowledge, and use of DTMS. This instruction is an online-based, flipped classroom instruction with practical applications, learning activities, small group exercises, and skills-based learning.

Standards: Demonstrate proper operator level functionality that best supports the company commander's guidance; properly add, edit, and/or assign training locations; add, remove, assign platoon personnel; demonstrate the management of personnel, signature blocks, users, and assigned personnel in the DTMS; demonstrate proper data pull to manage reports and unit training proficiency statuses without error.

2

Instructor Notes:

- Emphasize the standards (learning objectives) portion of the slide.

U.S. Army Combined Arms Center SOLDIERS AND LEADERS - OUR ASYMMETRIC ADVANTAGE	**Instructional Lead-in**

The Digital Training Management System (DTMS) is the Army's Learning Management System (LMS) for recording individual, unit, and organizational training. Preparatory Functions are the essential functions that serve as the foundation for every other DTMS function. The DTMS preparatory functions unit is an in-course unit designed to allow learners to recall previous knowledge about navigating Army systems while using their previous knowledge and scaffold that knowledge to increase their skills, knowledge, and use of DTMS. This instruction is an online-based, flipped classroom instruction with practical applications, learning activities, small group exercises, and skills-based learning.

DTMS Operators must possess basic computer skills of computer operating systems. Additionally, DTMS Operators must possesses core competencies which include Access to Army Networks & access to DTMS. DTMS operations need to show resiliency to meet the timely data entry requirements even though they are not receiving timely data, routine or sporadic system outages, and during busy times of multiple exercises requiring simultaneous input into DTMS.

UNCLASSIFIED

3

Instructor Notes:

- Direct students to read the slide

Instructor Notes:

The Preparatory Functions are necessary to properly use DTMS to its fullest potential. There are certain functions in DTMS that need to be setup prior to attempting to perform other functions. Items such as Locations and Signature Blocks are necessary for developing proper training schedules. Platoon Manager allows the building of subordinate units to better manage personnel records at the platoon or below levels. User Management will primarily be used by Managers to give users at all levels access to DTMS.

During this lesson we will demonstrate the following menus:

- Locations

- Platoon Manager

- Signature Blocks

- User Management Overview

- Manage Personnel

Menu items such as **Locations** and **Signature Blocks** are necessary for developing proper Training Schedules. Platoon Manager allows the building of subordinate units to

better manage personnel records at the platoon or below levels. User Management will primarily be used by managers to give Users at all levels access to DTMS.

Are there any questions?
Next slide

INSTRUCTOR NOTES: During this lesson, we will demonstrate the Locations functionality by accessing the following topics:
- Add a Location
- Edit a Location
- Delete a Location

Are there any questions?
Next slide

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

INSTRUCTOR NOTES:

Locations

Step 1

1. Navigate to the **Administration** menu.
2. Select **Locations** from the drop-down menu.
3. The screen refreshes to the **Lookup Management** page.

NOTE
The Administration menu provide users with the ability to perform some preparatory functions necessary to properly use DTMS to its fullest potential. There are certain functions in DTMS that need to be setup prior to attempting to perform other functions.

Next slide

INSTRUCTOR GUIDE

INSTRUCTOR NOTES:

The Locations menu allow units the ability to manage training locations when scheduling events. Units are responsible for entering the training locations that belong to their organization. If your unit does not own the training location, contact the unit that owns the location and request to have the location added.

Step 2
Click the **Select Lookup Table** drop-down menu.
Select **Location**.
Screen refreshes and displays previously added locations.

NOTE 1
The Class Location only applies to Course Manager and the Location applies to the unit used in scheduling.

NOTE 2
It is recommended that units add only the locations they control. When adding a location to an event, there is a de-confliction capability in DTMS that will alert users if they are trying to use the same location.

Add Location

Step 3
Click the **Plus** icon to add a location.
The screen refreshes to the **Edit Lookup** window.

Step 4
Enter required entries to add and a location:

Location Name: TA54
Location Type: Select Company Area from drop-down menu.
Is Active: Place a checkmark in the checkbox.
Select the **Save** button to record the location.
The screen refreshes and the new location is added.

NOTE 3
There are times when locations have been added that are duplicated at different echelons. Locations can only be deleted at the organization that built them. Be cautious when deleting locations, since the location may be linked to an event on the calendar. It is better to uncheck the box next to "Is Active" to remove the location from the drop-down menu rather than deleting the entire location, since it can then leave previous training schedules without locations for the events that were linked to the location.

Edit Location (Not shown on illustration)

Click the **Pencil** icon.
The screen refreshes and opens the **Edit Lookup** window.
Make any necessary changes.
Click the **Save** button to record your changes.

Delete Location (Not shown on illustration)

Click the **Delete** icon.
Dialog box opens to confirmation your selection.
Click the **OK** button

Are there any questions?

Next, we will demonstrate the **Platoon Manager** functionality.

Next slide

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

INSTRUCTOR NOTES:

Platoon Manager

NOTE
Platoon, Squad/Section, and Crew/Team drop-downs will only appear if that type of subordinate unit has been added using Platoon Manager.

The Platoon Manager function is valid only for company level DTMS users. Platoon Manager allow users to create subordinate PLT's, SQDs and Teams; assign personnel to those subordinate units and assign duty positions to those Soldiers within the platoons. During this lesson we will demonstrate the following menus: 1) Manage Subordinates, 2) Manage duty positions, 3) Align personnel, and 4) Subordinate unit menus (if built).

First, we will demonstrate how to Manage Subordinates.

Manage Subordinates

Access the Manage Subordinates fly-out menu.
Hover cursor over the **Administration** menu, the drop-down submenu opens.
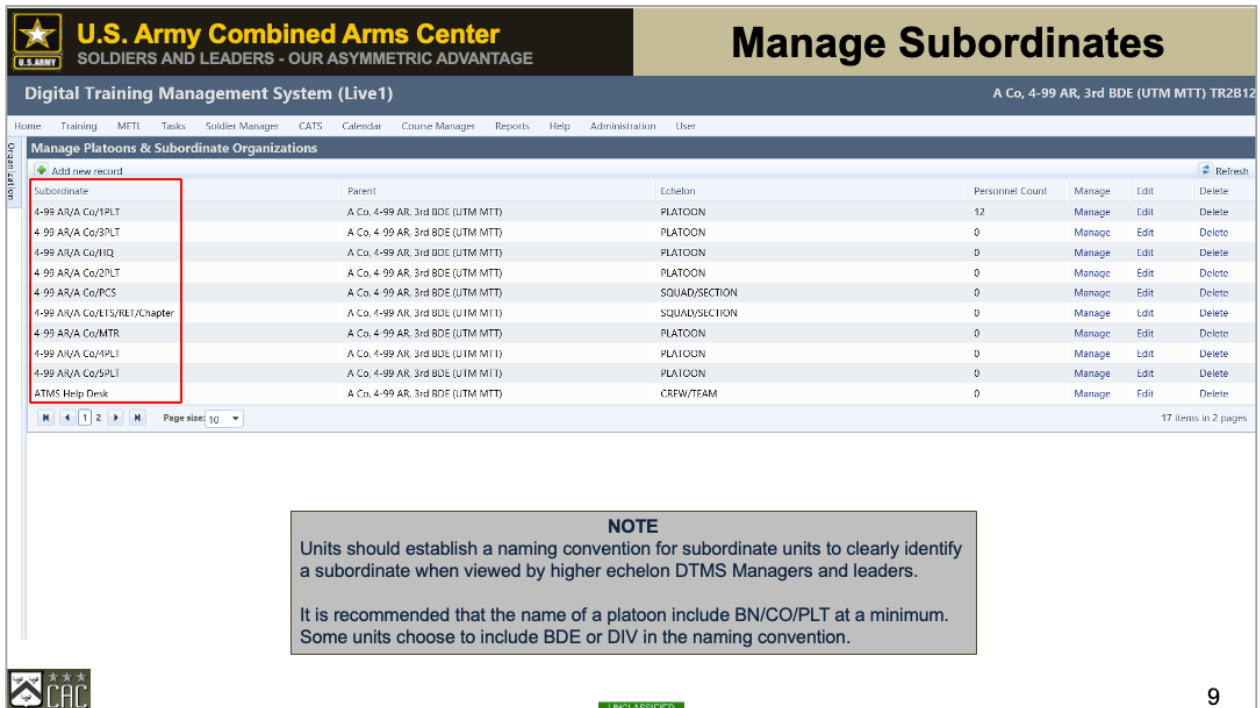
Hover cursor over the **Platoon Manager** submenu, the fly-out menu opens.
Click the **Manage Subordinates** fly-out menu.
The screen refreshes and the **Manage Platoons & Subordinate Organizations**
window opens.

Next slide

INSTRUCTOR NOTES:

Manage Subordinates

From the **Manage Platoons & Subordinate Organizations** window users have the
ability to **Add new record**, **Manage**, **Edit**, **Delete Subordinate Units**, and **Manage
Personnel Assignments/Duty Positions** for the subordinate units.

Next, we will add a new record.

Next slide

INSTRUCTOR NOTES:

Add New Record

To add new record, click the (+) **Plus** icon.
The screen refreshes and an additional row opens.
Enter the **Subordinate Unit** name in the text field.
Select the **Parent Unit** from the drop-down menu.
Select the **Echelon** of the subordinate platoon/section/squad from the drop-down menu.
Select the **Insert** button to record the new record.

Personnel can be aligned with the subordinate unit using the **Manage** button next to each Subordinate. This will lead to the same location shown later in the discussion of Aligning personnel and using the subordinate unit menus.

Every company level unit should add a subordinate for personnel that are no longer in the unit (PCS) and one for personnel that are no longer in the military (ETS/Chapter/RET). By placing personnel in these subordinates, a unit can identify the personnel that are no longer present and should not be included in statistics.

Are there any questions?

Next, we will demonstrate how to edit/delete subordinates.

Next slide

INSTRUCTOR NOTES:

Edit Subordinate

To edit a subordinate, click the **Edit** button for the appropriate subordinate.
The screen refreshes, and the fields become editable.
Edit the text field by changing the subordinate name.
Change the **Parent** unit by selecting from the drop-down menu.
Change the **Echelon** by selecting from the drop-down menu.
Click the **Update** button to record the changes.

If personnel do not show up in the Integrated Total Army Personnel Database (ITAPdB) for five consecutive days, they are supposed to be removed from DTMS. This has improved the previous issue of personnel remaining in units after they leave the military.

Delete Subordinates (Not shown on illustration)

NOTE

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

Before deleting a subordinate unit, ensure no personnel are aligned with that subordinate unit.

To delete a subordinate, click the **Delete** button.
A dialog box opens to confirm your selection.
Click the **OK** button to delete the subordinate.

Are there any questions? …Solicit learner response and gain feedback from learning session (Below)

==Solicit Learner Response and Gain Feedback: Ask the students an open-ended question about the topic. Encourage student dialogue and interaction with each other. The instructor will inject as required to assist learning and student engagement.==

Next, we will demonstrate how to Manage Duty Positions.

Next slide

INSTRUCTOR NOTES:

Manage Duty Positions

The Manage Duty Positions allow users the ability to create a duty position that can also apply to subordinate units. Not all units use Duty Positions and this should be based on SOP. If Duty Positions are built in this location, they can be assigned to personnel when assigning them to subordinate units.

Add New Record

Step 1
Navigate back to the **Administration** menu.
Hover cursor over **Platoon Manager**, click the **Manage Duty Positions** fly-out.

Step 2
To add a new record, click the **Add new record** icon.
The screen refreshes and opens the **Manage Duty Positions** window.

Step 3
Enter the **Duty Position** in the text box.
Enter the **Description** in the text box.
Click the **Insert** button to save new record.

Edit Duty Position (Not illustrated on screenshot)

To edit a duty position, click the **Edit** button.
The screen refreshes and the selected Duty Position and Description are editable.
Edit as needed, click the **Update** button to save changes.

Delete Duty Position (Not illustrated on screenshot)

To delete a duty position, click the Delete icon.
A dialog box opens to confirmation your selection.
Click the **OK** button to delete the duty position.

Are there any questions?

Next, we will demonstrate how use the Align Personnel functionality.

Next slide

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

INSTRUCTOR NOTES:

Align Personnel

The Align Personnel allow users the ability to edit personnel alignments within the subordinate units. It lists all Soldiers in your company and displays the Subordinate Unit they are aligned to (if applicable) and their Duty Position within the subordinate unit.

Step 1
Hover cursor over the **Administration** menu, the drop-down submenu opens.
Hover cursor over the **Platoon Manager** submenu, the fly-out menu opens.
Click the **Align Personnel** fly-out menu.
The screen refreshes and the **Align Personnel to Subordinates** window opens.

Step 2
Either search for a Soldier by entering their **Last Name** and **First Name** or click **Edit** under the **Align Personnel** column to align them to a subordinate.

NOTE
The Platoon Leader is not based on position, rather on the designation that this individual should be able to
update records for the personnel in that subordinate unit.

Edit Personnel

This process is how to Align personnel. Select the checkbox if the Soldier is a Platoon Leader or should be able to update records for the personnel in that subordinate unit. Additional options include, a Pencil icon that gives you the ability to view the Soldier's ITR and Excel icons to export a roster.

Are there any questions?

Next, we will demonstrate the Platoons functionality.

Next slide

INSTRUCTOR NOTES:

Platoons

The Platoons fly-out menu appears only when Subordinate units have been created and personnel are aligned to the proper subordinate units. Once the subordinate units are created and personnel are aligned, you must log out and log back in to DTMS to

activate the fly-out menu. Once the fly-out menu is activated a list of subordinate units will appear. When a subordinate unit is selected, it displays the roster of personnel in that unit. Additional options include Align Personnel, Edit, Delete, or View the Soldier's ITR.

Add Personnel to the Platoon

Step 1
Navigate back to the **Administration** menu.
Hover cursor over **Platoon Manager**, then **Platoons,** click the desired platoon fly-out.

Step 2
To Add Personnel to the subordinate platoon, click the **Align** icon.
The screen refreshes and the **Align Personnel** window opens.

Step 3
Use the filters to refine your search or click the **Search** button to display a roster of available personnel to align.
Place checkmarks in the appropriate checkboxes next to selected personnel.
Select the **Align** button to add the personnel to the roster.
The screen refreshes and the personnel are added to the roster.

Additional options include an **Edit** button, a **Delete** button, and a **View** icon to open the Soldier's ITR.

Are there any questions?

Next, we will demonstrate Signature Blocks.

Next slide

INSTRUCTOR NOTES:

Signature Blocks

The **Signature Blocks** menu allows users the ability to build the Commander's Signature block. Signature blocks will be printed on the training schedules. The commander for the organization is the only one that should be added here. An alternate approval authority can also have a signature block, but this is not normally necessary since the XO can sign for the commander as long as there is a memo signed by the commander designating signature authority.

Add New record

Step 1
Navigate back to the **Administration** menu.
Click on **Signature Blocks.**

Step 2
To add new record, click the **Add new record** icon and the **Add/Edit Signature Block** window opens.

Step 3

Enter the relevant information and select the **Save** button to save the signature block. The screen refreshes and the signature block is added.

NOTE

See AR 25-50 for signature block format. Signature blocks are printed on training schedules only.

Edit Signature Block (Not illustrated on screenshot)

Click on the **Pencil** icon.
The screen refreshes to the **Add/Edit Signature Block** page.
Make the necessary edits.
Click the **Save** button to save the signature block.
The screen refreshes and the signature block is saved.

Delete Signature Block (Not illustrated on screenshot)

Click the **Delete** icon.
A dialog box opens to confirm your selection.
Click the **OK** button to delete the signature.

Are there any questions?

Next, we will discuss the User Management functionality.

Next slide

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

INSTRUCTOR NOTES:

User Management Overview

The User Management allows users the ability to create, edit, remove, and search DTMS Users with access to your unit. Not all users will have this menu option. This menu is roles based; in order to see / use this menu you must have the following individual permission: ManageUsers.

First, we will demonstrate how to Create a User.

To create a user, you must have the individual's User Name exactly like it is recorded in ICAM. To verify the individual's exact User Name you can follow these steps to find it in ICAM:

Login to ICAM (https://www.icamportal.us.army.mil).
Select the "User Search" button in the middle of the screen; and use the search filters to locate the Soldier's ICAM record for whom they are granting access. In the search's return on ICAM, DTMS Managers will then see a column title "Legacy UID", formerly referred to as the "AKO username" and it is what must be used to create the Soldier's DTMS user account. For personnel that have joined the ARMY after 10 November of 2021 they will use the UID provided from the ICAM site.

Copy the User Name to be used in the next step.

NOTE
Granting Users access to a new unit will not deny them access to any other unit the user has access to.

Create a User

To access the **Create a User** fly-out menu.
Navigate to the **Administration** menu, the drop-down submenu expands.
Hover cursor over the **User Management** submenu, the fly-out menu opens.
Click the **Create a User** fly-out menu.
The screen refreshes and the **Add User** window opens.
Paste the Username in the User Name text field.
Press Tab key on keyboard or click outside the test box to auto-populate the additional boxes.
Select the **Unit** from the drop-down menu.
Select the **Save** button.
A dialog box opens to confirm that you want to move the user.
Click the **OK** button to save.
The screen refreshes to the **Edit User** page.

Next slide

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

INSTRUCTOR NOTES:

Edit User Page

On the Edit User page you have the ability to add additional units to the user account from the User Organizations window, determine what type of access is needed by assigning groups to the user account from the User Groups window, and assign permissions to the user account from the **User Permissions** window.

Add User Organizations

Step 1
To add units, click the expand triangle icon next to the parent unit.

Step 2
To select all available units, place a checkmark in the top checkbox next to the parent unit. **OR**
To select individual units, place checkmarks in the appropriate checkboxes.

Step 3
Click the **Add** button, the screen refreshes and display the units the user has access to.

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

NOTE

This list can grow quite large, so you have the option of a filter selection at the top of the page above the unit's name column to filter units down to be able to better manage them.

Next, we will demonstrate how to add User Groups.

Next slide

INSTRUCTOR NOTES:

User Groups

Determine what type of access is needed by assigning groups to the user. The User to Groups window allows you to customize the access to the units you previously selected. Place a checkmark only on Common Access group. This one group gives all of the permissions necessary for any echelon.

Add User to Groups

Step 4
Click the **Plus (+)** icon to add user groups.

INSTRUCTOR GUIDE

The screen refreshes and the **Add User to Groups** window opens.

Step 5

Click the triangle expander icon to view subordinate units.

Step 6

To select all units, place a checkmark in the top checkbox next to parent unit. **OR**
To select individual units, place checkmarks in the appropriate checkboxes.

Step 7

Scroll down the window, select the **Page size** drop-down menu, select 50. This option gives you max visibility of the group names. Place checkmarks in the following checkboxes:

NOTES

The list is not in alphabetical order. These are the most common functions at company, battalion, brigade and often at platoon.

- CalendarMenu
- CATSMenu
- DAFormsMenu
- ITSPMenu
- DATA TransferMenu
- PlatoonManagerMenu
- PlatoonMenu
- ReportingMenu
- TrainingExecuteMenu
- TrainingPlanMenu
- TrainingPrepareMenu

Next, scroll down to bottom of window, select the **Add Selected** button (Not shown on illustration).
Screen refreshes, a dialog box opens to confirm your group assignments have been added.
Click the **OK** button.
Scroll down to bottom of window, select the **Close** button.
NOTE: Do not use the red "X" to exit the window. This is known to "NOT" save your work.

Are there any questions?

Next, we will demonstrate how to add User Permissions.

Next slide

INSTRUCTOR NOTES:

Add User Permissions

The only User Permission that should be added is the ManageUsers permission if the User needs the capability to Create Users or manage user accounts. There are some other User Groups and Permissions that are necessary for personnel using the Course Manager portion of DTMS.

Step 8
Click the **Plus** icon to add user permissions.
The screen refreshes and the **Add User Permissions** window opens

Step 9
Click the triangle expander icon to view subordinate units.

Step 10

To select all units, place a checkmark in the top checkbox next to parent unit. **OR**
To select individual units, place checkmarks in the appropriate checkboxes.

Step 11
Scroll down the window, select the Page size drop-down menu, select 50. This option gives you max visibility of the permission names. Place checkmarks in the following checkboxes:

NOTE 1
The list is not in alphabetical order.

▪ManageUsers
▪SharedEventList
▪ManageCrew
▪ManageGunnerySettings

NOTE 2
Ensure the permission "Admin" is UNCHECKED. This permission will add unnecessary tabs and menu options that the user does not need. If you do not want this account holder to have the ability to manage and create users accounts, ensure that you also uncheck "Manage Users."

Next, scroll down to bottom of window, select the **Add Selected** button (Not shown on illustration).

NOTE 3
If the permissions are not on the current page, you must save your choices before going to the next page.

Screen refreshes, a dialog box opens to confirm your permission assignments have been added.
Click the **OK** button.
Scroll down to bottom of window, select the **Close** button.

NOTE 4
Do not use the red "X" to exit the window. This is known to "NOT" save your work.

Are there any questions?

Next, we will discuss/demonstrate how to Edit or Delete a User.

Next slide

INSTRUCTOR NOTES:

Search Users

The Search Users allows you to search for a user in DTMS. This Search method should be regularly monitored to ensure personnel that are no longer in the unit do not retain access to DTMS and the Individual records that are accessible in DTMS.

Search for Users

Step 1
Navigate back to the **Administration** menu.
Scroll down to the **Unit Management** submenu.
Click the **Search Users** fly-out menu.
The screen refreshes and the **User Search** window opens.

Step 2
Search by Unit using the **Unit** drop-down menu.
Select the parent unit from the drop-down menu.

Click the **Search** button.
The table populates a list of all users with access to DTMS in the parent organization.

NOTE
The Pencil icon gives you access to the **Edit User** window to edit the user account (Not demonstrated on illustration).

Are there any questions?

Next, we will demonstrate how to Edit/delete user.

Next slide

INSTRUCTOR NOTES:

Edit or Delete a User

Navigate back to the **Administration** menu.
Scroll down to the **User Management**.
Click the **Search Users** fly-out menu.
Screen refreshes to the **User Search** window.

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

Step 1
You must specify one of the following values: **unit**, **last name**, **first name**, **user name**, or **email address**.
Next, click the **Search** button.
Screen refreshes and display the name in the grid.

Edit

Step 2
To edit user, click the Pencil icon.
Screen refreshes to the **Edit User** window.
From this screen you can edit the User Group and permissions.

Delete

Step 3
To delete user, select the **Unit** by placing a checkmark in the checkbox.
Click the **Remove** button, screen refreshes and removes the individual from unit.
Next, place **checkmark** in the checkbox underneath the User Groups table next to the Unit.
Click the **Remove Selected** button.
Next, place **checkmark** in the checkbox underneath the User Permissions table next to the Unit.
Click the **Remove Selected** button.
Click the **Save** button (near top of page).

NOTE
If there are 2 or more pages, click the Page Size drop-down and select 50.

NOTE: The user may not disappear immediately from the list but should disappear within 24 hours.

Next, we will demonstrate the User Report functionality.

Next slide

INSTRUCTOR NOTES:

User Reports

The User Reports menu allows you the ability to search for three different reports: **Functions Used**, **Functions Used By Time Period**, and **User Access Report**.

First, we will demonstrate the **Functions Used** report.

Step 1
To access the **Functions Used** fly-out menu.
Navigate to the **Administration** menu.
Scroll down to the **User Management**.
Hover cursor over the **Used Reports** submenu.
Click the **Functions Used** fly-out menu.

NOTE
The screen refreshes and the **Functions Used Report** window opens. Notice the Unit defaults to the unit you are logged into.

Step 2
Select the **Unit** from the Unit drop-down menu.

Select a **Page** from the drop-down menu.
Select a **Page Actions** from the drop-down menu.
The screen refreshes, notice the **Search** button is now activated.
Click the **Search** button to view the search results.
The screen refreshes and the search results are displayed in an Excel table format.

Step 3
You have the option to view the number of items displayed by selecting from the **Page Size** drop-down menu. There is an option to generate an Excel spreadsheet by selecting the **Excel** icon.

Are there any questions? …Solicit learner response and gain feedback from learning session (Below)

<mark>Solicit Learner Response and Gain Feedback: Ask the students an open-ended question about the topic. Encourage student dialogue and interaction with each other. The instructor will inject as required to assist learning and student engagement.</mark>

Next we will demonstrate the Functions Used by Time Period Report.

Next slide

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

INSTRUCTOR NOTES:

Functions Used By Time Period

To access the **Functions Used By Time Period** fly-out menu.

Step 1
Navigate to the **Administration** menu.
Scroll down to the **User Management** submenu.
Hover cursor over the **User Reports** fly-out menu.
Click the **Functions Used By Time Period** fly-out menu.
The screen refreshes and the **Time Period Function Used Report** window opens.
Notice the Unit defaults to the unit you are logged into.

Step 2
Select an option from the **Page** drop-down menu: **APFT**, **Height/Weight**, and **Weapons**.
Notice when the **Page** is selected, it activates the **Fiscal Year** drop-down menu and Date calendar menu.
Select the **Fiscal Year** drop-down menu, this is a mandatory field.
Notice when the Fiscal Year is selected, it activates the Quarter and Month drop-down menus. These fields become activated.
Select either the **Quarter** or **Month** from the drop-down menu. When you select either **Quarter** or **Month** it deactivates the other field.

NOTE
To search by fiscal year, you must select a quarter or month. Select a fiscal year to search by quarter. Select a fiscal year to search by Month. When selected, it activates the Day of week drop-down menu.

Select the **Calendar** icon to select a Date. When the Day of Week is selected, it deactivates the Quarter and Month drop-downs.
To search by day of the week: select the **Day of Week** from the drop-down menu, this is not a mandatory field.
To search by time: select the **Time of Day** from the drop-down menu.
NOTE: Time is in Eastern Standard Time (EST), this is not a mandatory field.
Once you are satisfied with your selections, click the **Search** button to reveal your search results.
The screen refreshes and displays the results in the grid.

Step 3

You have the option to view the number of items displayed by selecting from the **Page Size** drop-down menu, and you have the option to generate an Excel spreadsheet by selecting the **Excel** icon.

Are there any questions?

Next slide

INSTRUCTOR NOTES:

User Access Report

To access the **User Access Report** fly-out menu.

Step 1
Navigate to the **Administration** menu.
Scroll down to the **User Management** submenu.
Scroll over to the **User Reports** fly-out menu.
Click the **User Access Report** fly-out menu.
The screen refreshes and the **User Access Report** window opens.

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

NOTE

You have the ability to select a **Unit**, a **Group Role**, or the **Individual Role** from the drop-down menus. The Unit is populated with your current unit. Notice the **Search** button is deactivated.

Step 2

Select either a **Group Role** or an **Individual Role** from the drop-down menu. It activates the **Search** button.
To reveal the results of the selected role, click the **Search** button.
The screen refreshes and displays the results in the grid.

Step 3

You have the option to view the number of items displayed by selecting from the **Page Size** drop-down menu, and you have the option to generate an Excel spreadsheet by selecting the **Excel** icon.

Are there any questions?

Next, we will demonstrate Manage Personnel from the Soldier Manager menu.

Next slide

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

INSTRUCTOR ONLY: The instructor/facilitator must demonstrate the functionality on a live network (depending on network availability). When network connectivity is not available, the instructor/facilitator must initiate contingency plan.

INSTRUCTOR NOTES:

Manage Personnel

Actions taken using Manage Personnel do not constitute actual personnel moves. Only personnel actions through ITAPdb can change a Soldier's UIC assignment. This role is designed to help units manage the training records of attachments and Soldiers transitioning into or out of the unit until actual personnel actions are reflected in DTMS.

Navigate to the **Soldier Manager** menu.
Scroll down and click the **Manage Personnel** submenu.
The screen refreshes and the **Manage Personnel** window opens.

The **Manage Personnel Soldier Search** page contains multiple filters by which the user can select from to locate the desired Soldier(s). These filters include **Last Name**, **First Name**, **Skill Level**, **MOS**, **Rank**, and **Organization** along with the **MOS** filters of **Primary Only**, **Secondary Only**, and **Any**, and personnel status filters of **Assigned**, **Attached**, and **Detached**.

Step 1
Enter your search criteria using the filters to conduct a specific search, or click the **Search** button to view all personnel in the organization you are logged into.

Step 2
To create an **Excel Real-Time Data Transfer** template.
Select the appropriate training type from the drop-down menu.
Select Soldiers by placing checkmarks in the checkboxes next to the desired Soldiers.
Next, select the **Excel Export** icon, Excel spreadsheet opens, save spreadsheet to your local computer to be used in a later lesson.

Are there any questions?

Next, we will demonstrate how to Attach personnel.

Next slide

INSTRUCTOR ONLY: The instructor/facilitator must demonstrate the functionality on a live network (depending on network availability). When network connectivity is not available, the instructor/facilitator must initiate contingency plan.

INSTRUCTOR NOTES:

Attach Soldier

This function gives you the ability to attach a Soldier not in the unit's UIC but is participating in training events and needs
their training recorded in DTMS.

To begin, select the Attach button, the attachment window opens.
Enter full Social Security Number (no hyphens).
Enter Last Name
Enter Start Date.
Enter End Date.
Click the Attach button.
The screen refreshes and the personnel is attached to the unit.
To confirm, select the **Attached** checkbox in the **Soldier Search** window, click the **Search** button.

NOTE 1
Once the user has attached the personnel, the personnel's training record will then be available as attached to the unit; and the training record will be automatically counted as detached from their assigned unit.

NOTE 2
The user can confirm the attachment by selecting the 'Administrative' tab from the home menu, and scrolling down to the 'Personnel' section.

Next, we will demonstrate how to re-attach personnel.

Re-Attach Personnel

Re-Attach function is best performed at the company level. This allows Users to return personnel to the UIC to which they belong in ITAPdb. This is the proper way to release personnel that have been attached to the unit and this is the way to return personnel from a detached status and allow the system to place them where they should be according to UIC.

First, you must check the **Attach** checkbox in the **Soldier Search** window.
Next, click the **Search** button, screen refreshes and displays name(s).
Next, place checkmark(s) in the checkbox(es) next to the personnel name(s).
Click the **Re-attach** button.

NOTE: If this does not remove them from the status of Detached or Attached, contact the Help Desk for assistance.

Are there any questions?

Next, we will discuss how to Detach personnel.

Detach Personnel

NOTE: The Detach personnel functionality is not recommend to use to detach personnel.

Detach button is a holdover from previous versions of DTMS. The intended use of this function is no longer viable. DO NOT detach personnel in DTMS. This is NOT the way to clean up the personnel in the unit. By detaching personnel, the personnel
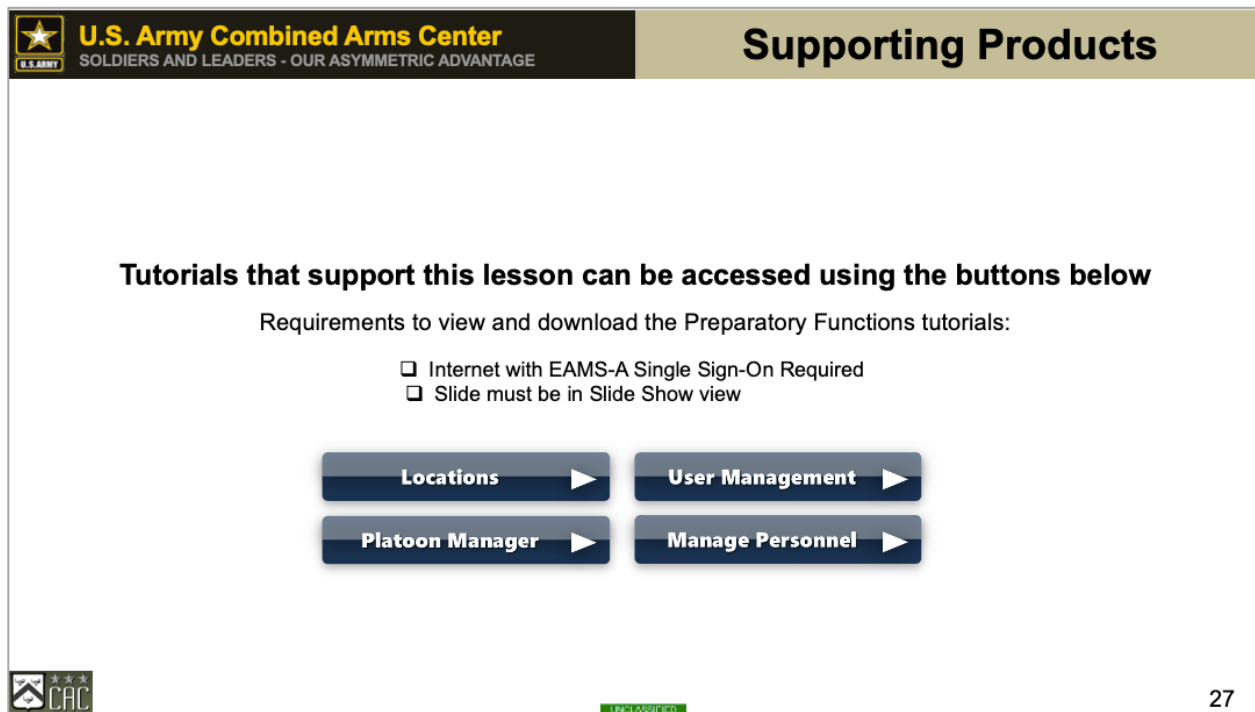
become invisible and cannot be managed properly by the automated systems in place and moved to the correct unit based on their UIC. This does not improve your statistics and should not be done.

Are there any questions?

Next, we will introduce the supporting products for this lesson.

Next slide

INSTRUCTOR NOTES: The tutorials can be found on the DTMS Knowledge Base. The buttons link to PowerPoint tutorials for this lesson. Students are encouraged to review these tutorials. The tutorials can be used as refresher training.

Are there any questions?

Next, we will conduct a check on learning.

Next slide

INSTRUCTOR NOTES: The tutorials can be found on the DTMS Knowledge Base. The buttons link to PowerPoint tutorials for this lesson. Students are encouraged to review these tutorials. The tutorials can be used as refresher training.

Are there any questions?

Next, we will conduct a check on learning.

Next slide

INSTRUCTOR ONLY: Determine if students have gained familiarity with the material discussed by soliciting student questions and explanations. Ask the students questions and correct misunderstandings.

Next slide

INSTRUCTOR NOTES:

Q1. True or False. FM 7-0 supports the idea that training a unit does not fundamentally differ from preparing a unit for an operation.

Q2. True or False. Training Management today is accomplished through the processes outlined in the doctrine and FM 7-0, but it is also the disciplined use of enabling web-based tools.

Q3. True or False. CATS are composed of a number of Event Sets (ES). An ES is a grouping of individual tasks that could logically be trained together during a Training Event.

Q4. What does the Align Personnel allow users to do?

Q5. True or False. The User Reports menu allows you the ability to search for three different reports: They are Functions Used, Functions Used By Date, and Personnel Access Report.

Q6. What provides units a snapshot of the information shared with NetUSR?

Next slide

INSTRUCTOR ONLY: Determine if students have gained familiarity with the material discussed by soliciting student questions and explanations. Ask the students questions and correct misunderstandings.

INSTRUCTOR NOTES:

Q1. True or False. The three Training Proficiencies are MET, Weapons and Collective Live-Fire Proficiencies.
A1. True

Q2. True or False. Training Management today is accomplished through the processes outlined in the doctrine and FM 7-0, but it is also the disciplined use of enabling web-based tools.
A2. True

Q3. True or False. CATS are composed of a number of Event Sets (ES). An ES is a grouping of individual tasks that could logically be trained together during a Training Event.
A3. False. CATS are composed of a number of Task Sets (TS). A TS is a grouping of collective tasks that could logically be trained together during a Training Event.
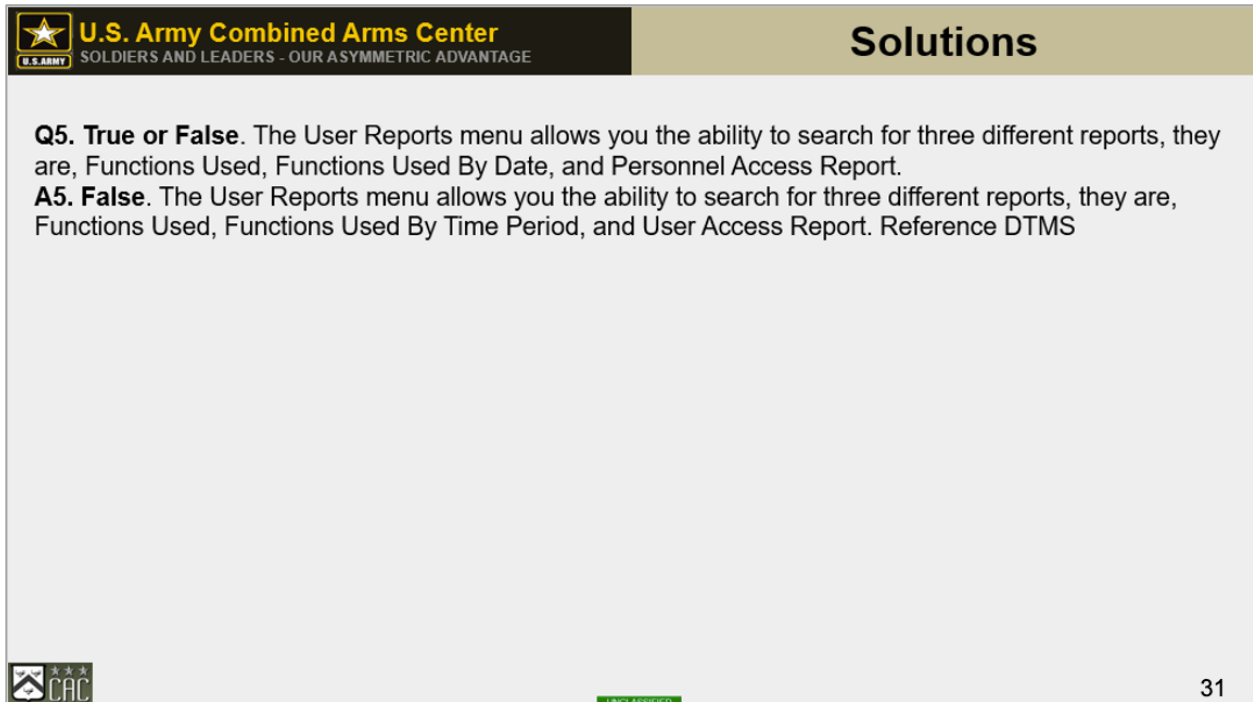
Q4. What does the Align Personnel allow users to do?

A4. The Align Personnel allow users the ability to edit personnel alignments within the subordinate units. Reference DTMS, Administration tab, Platoon Manager submenu

Next slide

INSTRUCTOR ONLY: Determine if students have gained familiarity with the material discussed by soliciting student questions and explanations. Ask the students questions and correct misunderstandings.

INSTRUCTOR NOTES:

Q5. **True or False**. The User Reports menu allows you the ability to search for three different reports: They are Functions Used, Functions Used By Date, and Personnel Access Report.
A5. False. The User Reports menu allows you the ability to search for three different reports, they are, Functions Used, Functions Used By Time Period, and User Access Report.

This concludes the check on learning.

Are there any questions?

Next Slide

Instructor:
- Provide learners with the PBL practical exercise scenario (Appendix C)
- Interact with learner groups while the complete/participate in the PE
- Provide insight to facilitate learning

Next Slide

Instructor:

- Facilitate a group interactive review of the displayed scenario results
- Learner's report should look identical to the displayed report
- If any learner's reports look different, analyze the discrepancy, and provide insight to the learners to highlight the correct procedures

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

Appendix A: DTMS Preparatory Functions Pre-work – Scavenger Hunt

Step 1: Watch the following five videos that are found on your DTMS course tablet while answering the scavenger hunt questions in Step 2 below:

- ***Adding, Editing, and Assigning Training Locations in the DTMS***

- ***Adding, Editing, and Assigning Platoon Personnel in the DTMS***

- ***Managing Personnel in the DTMS***

- ***Managing Signature Blocks in the DTMS***

- ***Managing Users in the DTMS***

Step 2: Answer the following questions about the information provided from the five videos required in step 1:

1) What tab of the DTMS includes the data field "**LOCATIONS**?"

    _____

2) To add a location to the DTMS, what icon must you click in the **LOCATION'S LOOKUP MENU**?
    _____

3) When **MANAGING SUBORDINATES** in the DTMS and making required edits, what is the **last step** you must take for the **DTMS to record the changes**?

    _____

4) When MANAGING PERSONNEL in the DTMS, what **ICON** must you click to **ADD PERSONNEL TO A PLATOON**?

    _____

5) When **CREATING USERS** in the DTMS, what **SYMBOL** indicates units the user has access to?

    _____

6) When **MANAGING PERSONNEL** in the DTMS, what format options are available to **EXPORT** the selected data?

    _____

Step 3: Bring the completed scavenger hunt to class and be prepared to talk about steps and processes you took to complete it, ease of use, complications, and techniques used.

Appendix B: DTMS Preparatory Functions Pre-work – Practical Application Scenario

Directions

1) Read the scenario provided below and determine what entries you are required to make in the DTMS.
2) Enter the DTMS user training site using the icon provided on the home screen of your course tablet.
3) Login to the DTMS training site and add, edit, or delete the data you determine essential from the provided scenario.
4) Save the following reports to your tablet:
   - 90-day training calendar
   - Platoon roster for "A TRP, 4-99AR, 3rd BDE."
   - A user roster for "A TRP, 4-99AR, 3rd BDE."
5) Bring the completed PE to class and be prepared to talk about steps and processes you took to complete it, ease of use, complications, and techniques used.

Scenario

You are the new training manager for 4-99AR, 3rd BDE. As the training manager, you are responsible for the training management and the DTMS for 400 people. After gaining access to DTMS you start to look at the unit rosters, personnel assignment and alignment, signature blocks, and scheduled training.

- Your unit recently had a change of command – **CPT Look Atme** recently changed command with the incoming commander, **CPT Good Idea**.

- Your unit has scheduled an **ACFT** but could not find a location for the event. The Battalion S3 just called to inform you that **Hurling Field** just became available for your units scheduled ACFT on **September 3rd** of this year.

- After comparing your unit's accountability roster, you determine that **SPC Dead Weight** and **SPC Complains Alot** have departed the unit but are still assigned in the DTMS. Additionally, **SPC High Speed** and **SPC Low Drag** have arrived at the unit but are not input in the DTMS.

- **SPC Complains Alot** is assigned to **1st Platoon** under the leadership of **SGT Oxygen Thief** and **SPC Low Drag** is assigned to **2nd Platoon** under the leadership of **SGT Lost Sauce**.

- **SGT Cold Asice** approached you requesting viewing rights to his platoon personnel – **3rd Platoon**.

- **CPT Good Idea** needs to sign the **training schedule** for the units ACFT. He requests a **report** ready for his **signature** by the **end of the day**.

- The First Sergeant is requesting the entire **units training status**, broken down **by platoon**, **printed** and on his desk before the **end of the day**.

Appendix C: Problem Based Learning – Practical Exercise (PE) Scenario

U.S. Army Combined Arms Center SOLDIERS AND LEADERS - OUR ASYMMETRIC ADVANTAGE	Practical Exercise

Practical Exercise

- Divide into groups of no more than four people
- The instructor will provide each group with a scenario
- Each group will have 30 minutes to follow the directions provided in the scenario
- Each group is encouraged to collaborate with each other while completing the scenario
- Groups are allowed to communicate with other groups
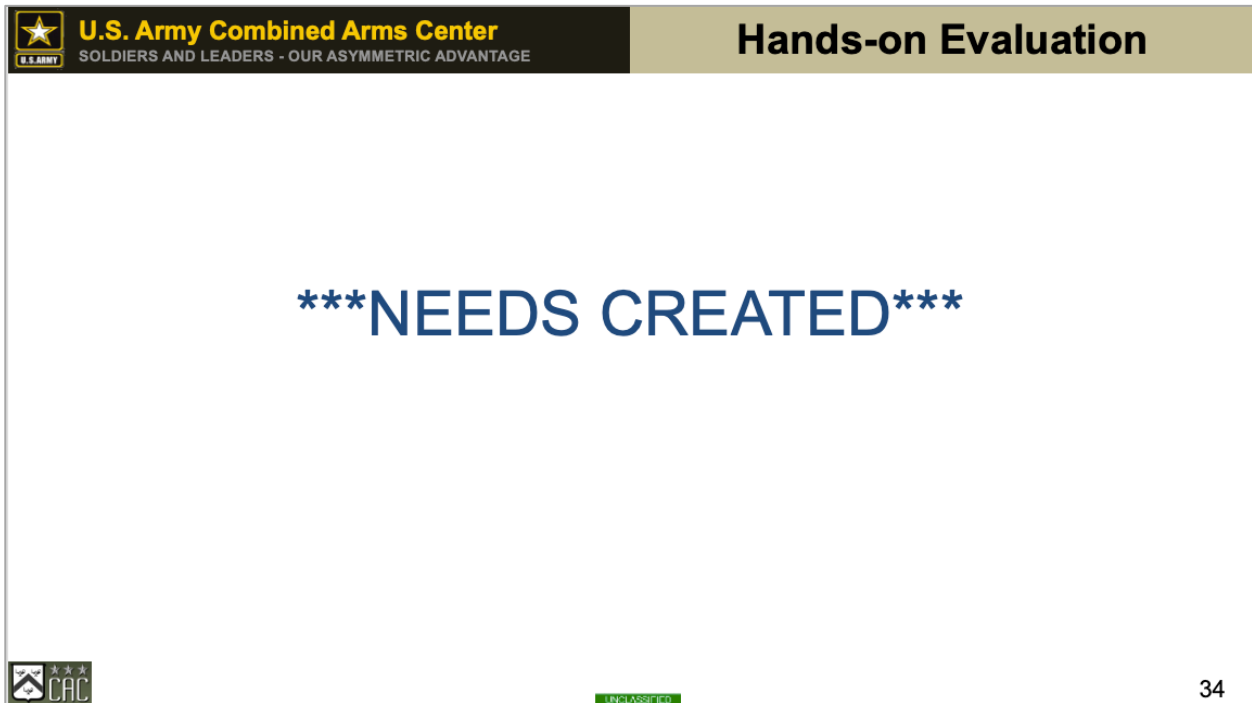- After completing the scenario, take a break

32

Instructor:

- Walk around and monitor each group to assess their knowledge, performance, techniques, and offer assistance/guidance to concrete their knowledge and facilitate learning.

Appendix D: Hands-on Evaluation

U.S. Army Combined Arms Center	Hands-on Evaluation
SOLDIERS AND LEADERS - OUR ASYMMETRIC ADVANTAGE	

NEEDS CREATED

34

Instructor:

- Learners are provided a tablet and a controlled scenario with data they will input into DTMS
- After entering the scenario data into DTMS, learners will generate a report as indicated in the scenario
- After generating the report indicating that the learner has completed the evaluation, the instructor will evaluate the report and ensure accuracy and completeness

Note: When created, the controlled hands-on evaluation should emulate the scenario included in Appendix B of this guide. When using the term controlled, this means there are several versions that learners are provided with for the hands-on evaluation and return their specific version to instructor after completing their evaluation. Learners are prohibited from copy, re-producing, or distributing their evaluation scenario.

DTMS PREPARATORY FUNCTIONS
INSTRUCTOR GUIDE

Appendix E: Hands-on Evaluation Rubric

GRADED COMPONENT	YES	NO	N/A	COMMENTS
Add, Edit, and/or Assign Training Locations				
EDIT: "*Auditorium*" is removed from the training location in the supplied report?				
ADD: "*Gymnasium*" is added to the report as one of the many possible training locations?				
ASSIGN: The training location for the "*NCOPD*" on 17 September 2022 now states "*Post Theatre*?"				
Add, Remove, and Assign Platoon Personnel				
ADD: Added "*PVT Joe Snuffy*" to first platoon?				
REMOVE: Removed "*PVT Lost Sauce*" from 2nd Platoon?				
ASSIGN: Assigned "*SPC Smooth Sailing*" to easy riders?				
Management of Personnel				
Align: Align "*PVT Joe Snuffy*" under the leadership of "*SGT Joe Cool*."				
MOVE: Move "*PVT Lost Sauce*" from alignment of "*SGT Joe Cool*" to the leadership of "*SGT Iced Tea*."				
Manage Signature Blocks				
REMOVE: Deleted "CPT Lost Cause" from the signature block list?				
ADD: Added "CPT Daddy Cool" to the signature list?				
Manage Users				
REMOVE: Deleted "*SGT Send Help*" from the list of DTMS User list?				
ADD: Added "*SGT Watch This*" to the DTMS User List				
GRADING CRITERON: To receive a passing score, learners cannot score a "NO" more than once in any category, or twice for the entirety of this assessment.				

Students Name: _____   **Date:** _____

Comments:_____

_____

_____

_____