FEDERAL ACQUISITION INSTITUTE

# Certification Owner Task Aid

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*To foster a high-performing, qualified civilian acquisition workforce.*

[https://www.fai.gov/](https://www.fai.gov/)

FAI@mail.mil

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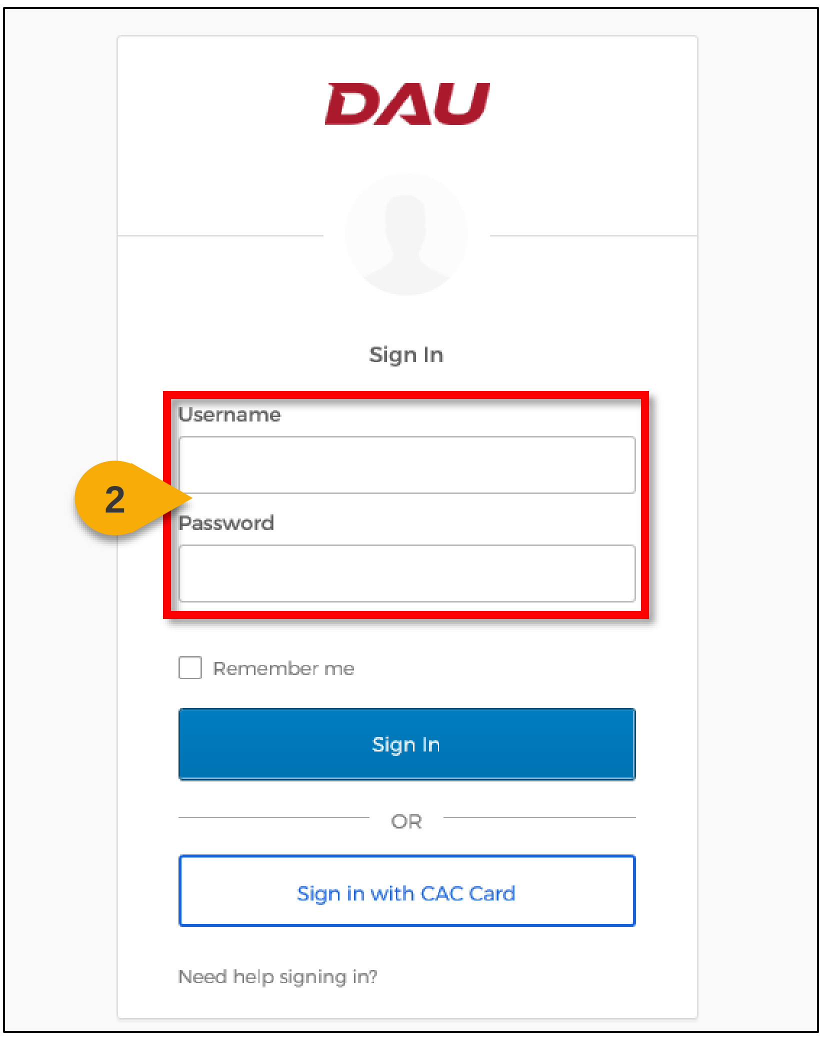
# User Account Management

# Log On

*When you want to log in…*

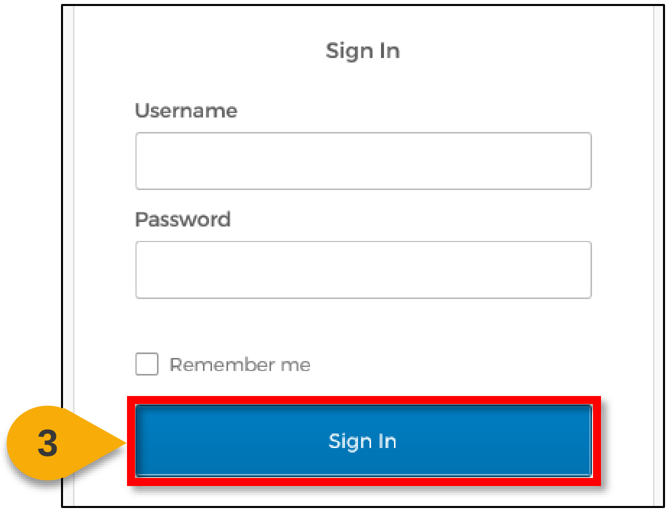
**Step 1:** Go to URL: [https://dau-stg.csod.com](https://dau-stg.csod.com) (do not use the Internet Explorer browser). You may want to log out of VPN before starting this process.


**Step 2:** The login window will pop up. Enter your **Username** (your email) and **Password** in their respective fields.

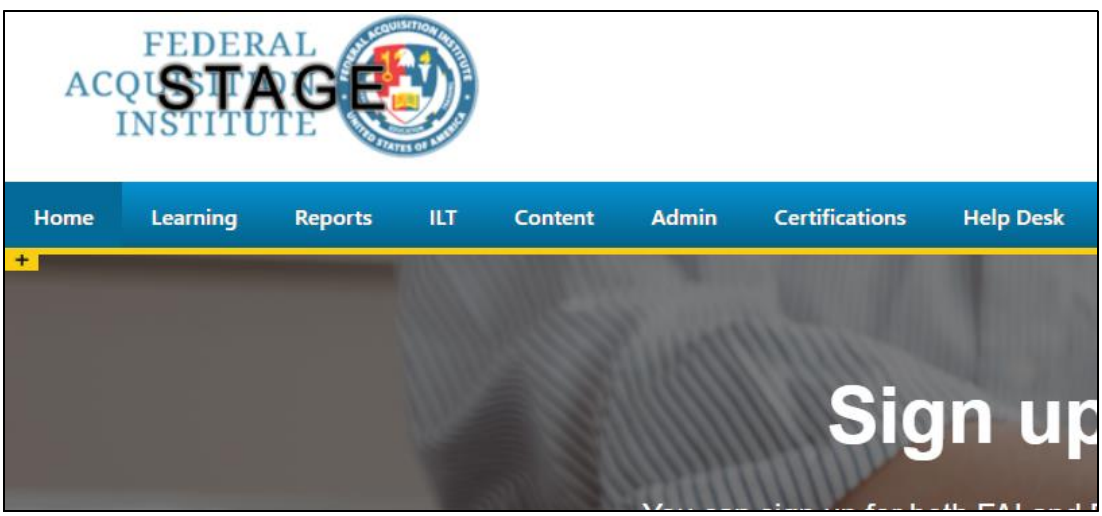


# Log On (Cont.1)

**Step 3:** Click **Sign In.**




Once you successfully complete the SSO login process, CSOD should open with your organization's logo in the upper left corner.



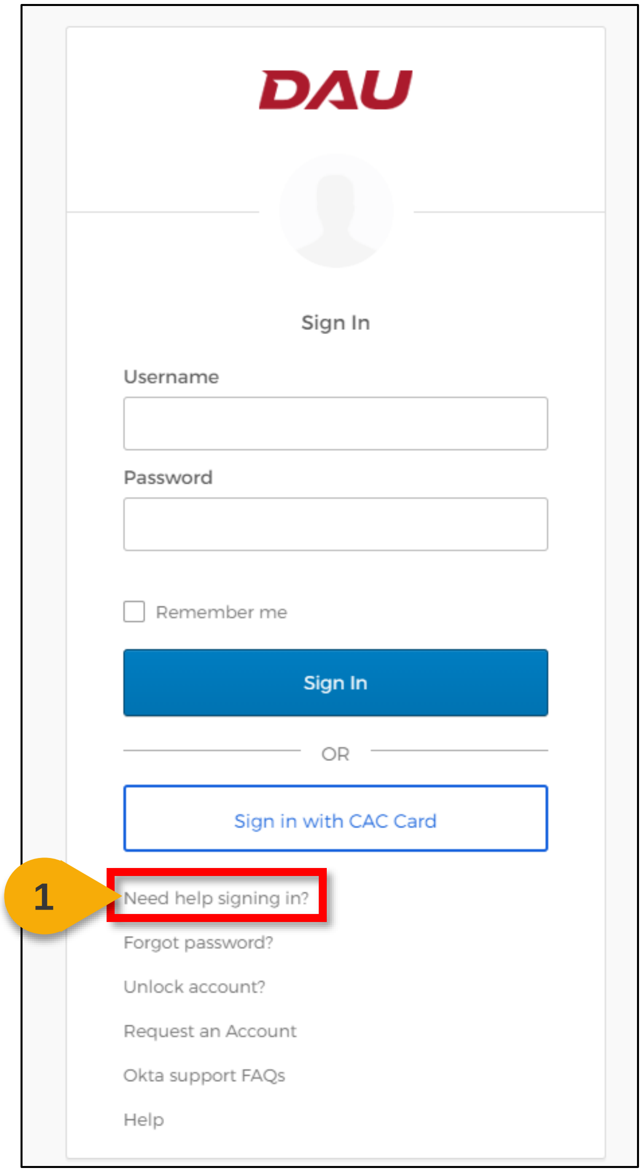

**NOTE:** If you receive an error message:

- Clear your cache
- Try a different browser
- Disconnect from the VPN

# Forgot Password

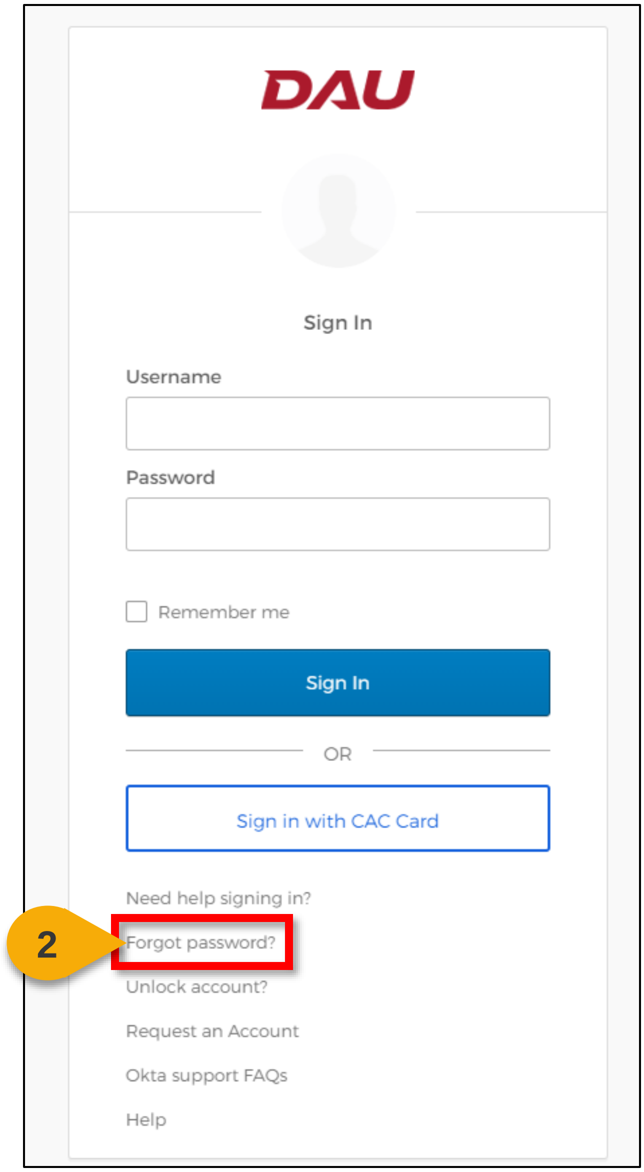
*When you can't log in…*

**Step 1:** If need help signing in, select the **Need help signing in?** link at the bottom of the window.



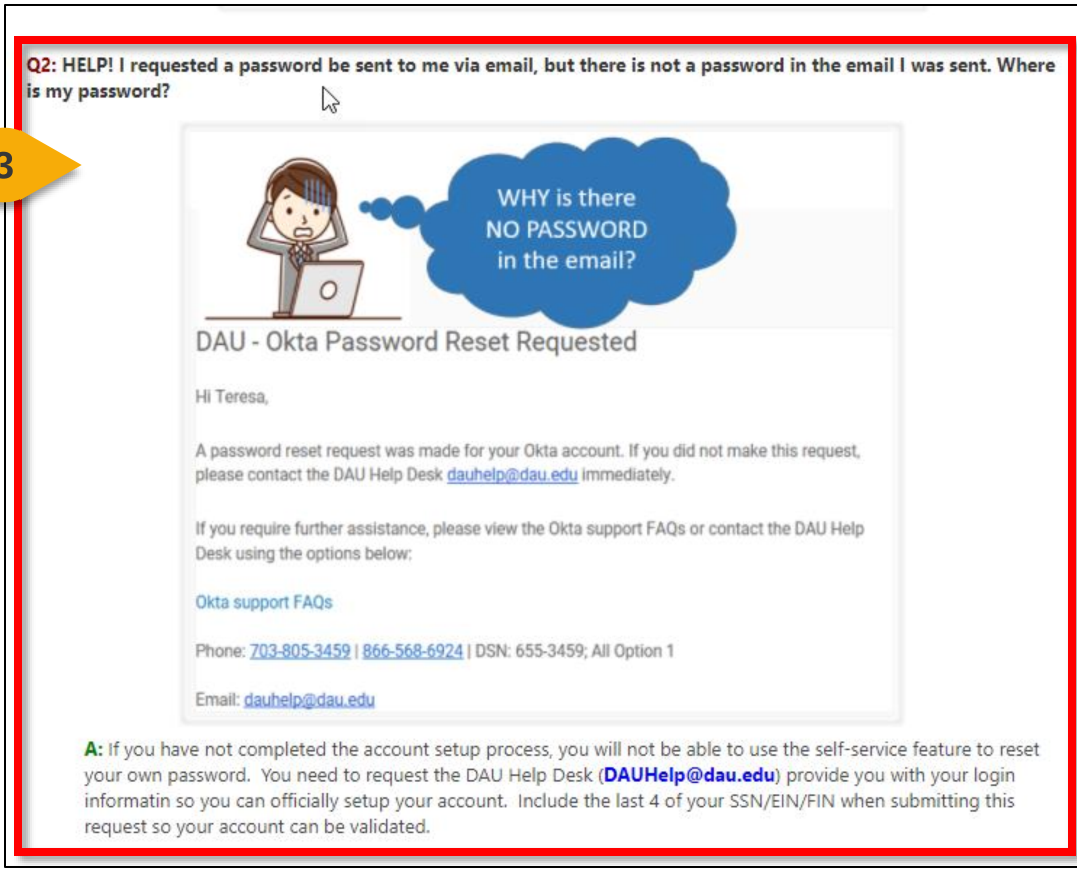
# Forgot Password (Cont.1)

**Step 2:** If you already set up OKTA to reset your password, select **Forgot Password?** option to have a new password/PIN sent to your email or phone.



# Forgot Password (Cont.2)

**Step 3:** Select the OKTA support FAQs option and follow the directions for **Q2.**



**Q2: HELP! I requested a password be sent to me via email, but there is not a password in the email I was sent. Where is my password?**



DAU - Okta Password Reset Requested

Hi Teresa,

A password reset request was made for your Okta account. If you did not make this request, please contact the DAU Help Desk dauhelp@dau.edu immediately.

If you require further assistance, please view the Okta support FAQs or contact the DAU Help Desk using the options below:

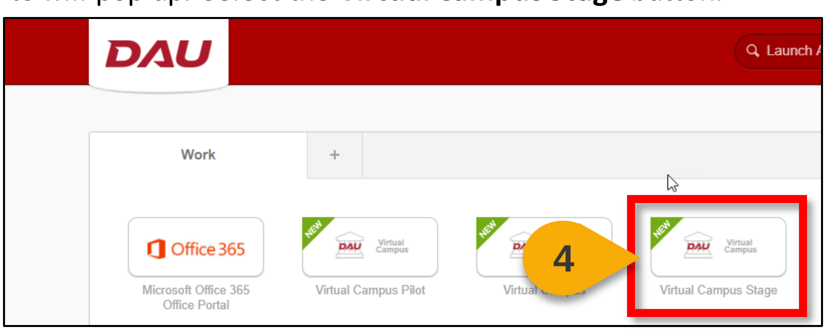
Okta support FAQs

Phone: 703-805-3459 | 866-568-6924 | DSN: 655-3459; All Option 1

Email: dauhelp@dau.edu

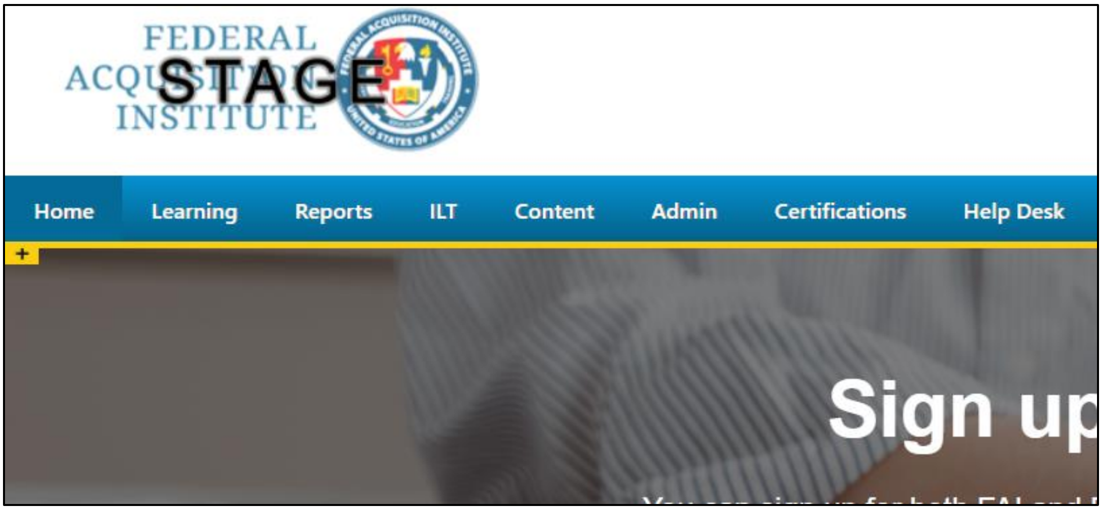
**A:** If you have not completed the account setup process, you will not be able to use the self-service feature to reset your own password. You need to request the DAU Help Desk (**DAUHelp@dau.edu**) provide you with your login informatin so you can officially setup your account. Include the last 4 of your SSN/EIN/FIN when submitting this request so your account can be validated.

**Step 4**: Once you have the username and password entered, the list of systems you have access to will pop up. Select the **Virtual Campus Stage** button.



# Forgot Password (Cont.3)

Once you successfully complete the SSO login process, CSOD should open with your organization's logo in the upper left corner.



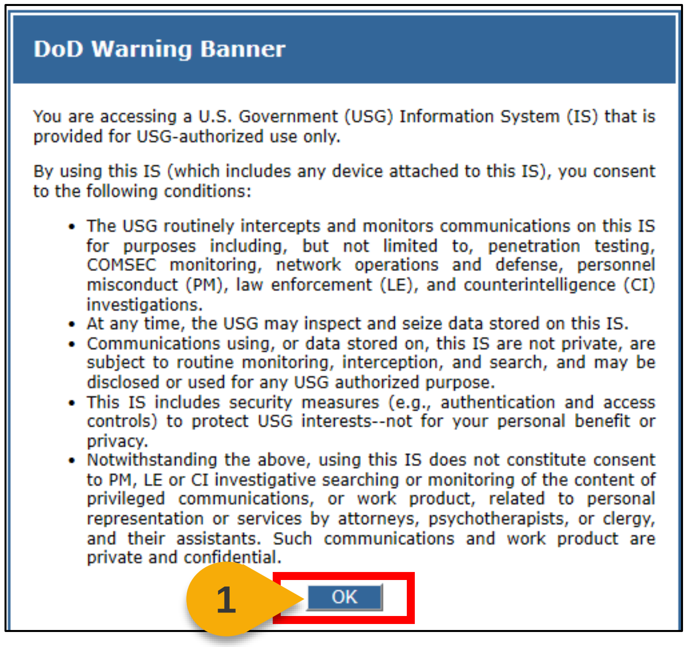

**NOTE:** If you receive an error message:

- Clear your cache
- Try a different browser
- Disconnect from the VPN

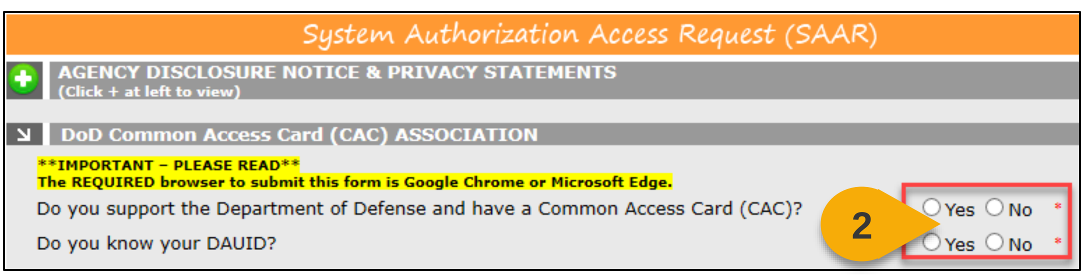
# Request an Account Using the SAAR Form

*When you need to complete the DAU SAAR for access to the Virtual Campus…*

**Step 1:** Navigate to https://saar.dau.edu. You will see a DoD Warning Banner. **Click "Ok".**



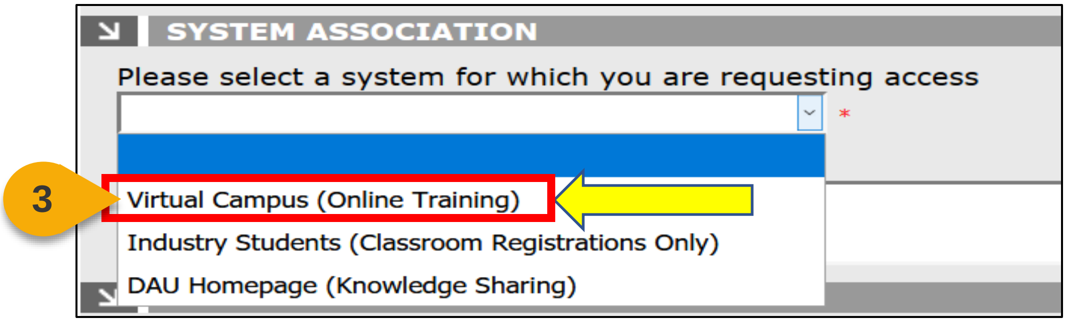

**Step 2:** Click the **radio buttons** to answer the questions regarding having a DoD CAC and/or DAUID.



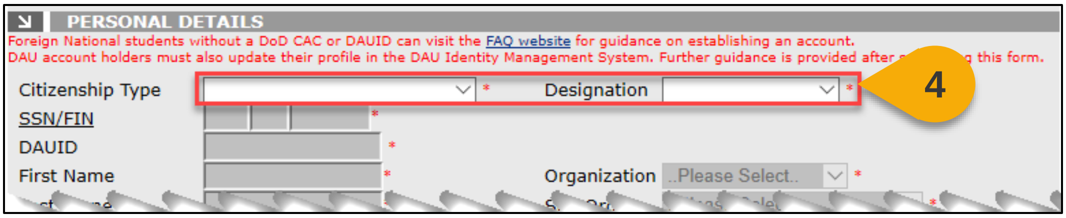

**NOTE:** If you support the Department of Defense and have a Common Access Card (CAC), the system can determine if there is already a DAUID associated to your information. If you select "Yes" and the system does find your account, the fields for your DAUID, Name, and Email address under PERSONAL DETAILS will automatically be filled in.

# Request an Account Using the SAAR Form (Cont.1)

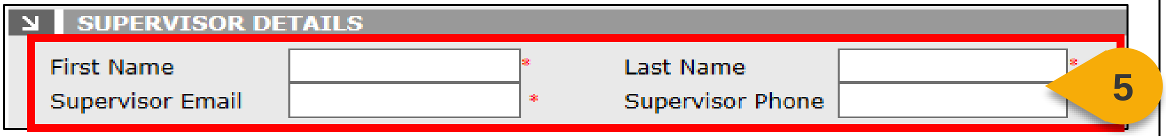
**Step 3:** Under SYSTEM ASSOCIATION you must select "**Virtual Campus (Online Training)**". If you choose one of the other options, this will significantly delay the process to have an account created to take a course.




**Step 4**: Enter the required information in all fields that have not been grayed out.



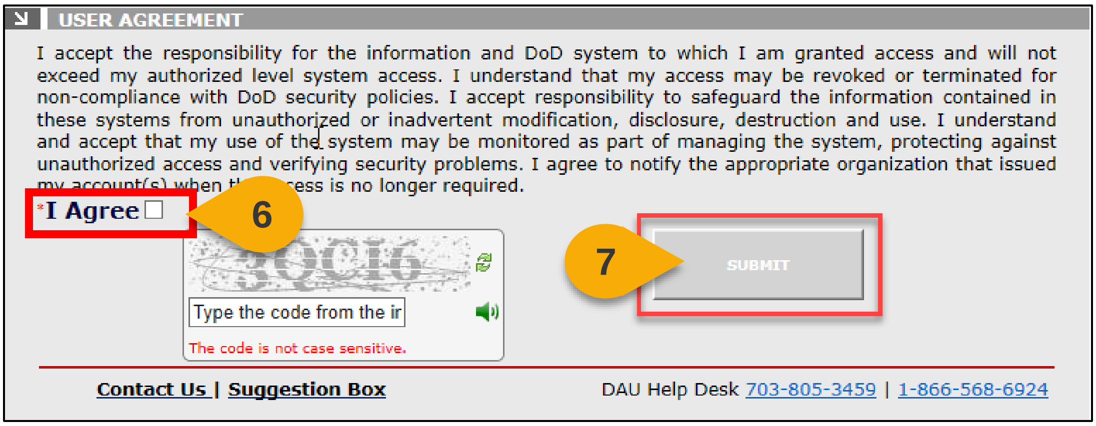

**Step 5**: Enter your **SUPERVISOR DETAILS**.



# Request an Account Using the SAAR Form (Cont.2)

**Steps 6 & 7**: Read the USER AGREEMENT and check the "**I Agree**" box. Enter the code, which is not case sensitive, from the image in the box. You can select the green arrows to generate a new code or select the green sound image for the code to be vocalized. Afterwards select the **"Submit"** button.

.



USER AGREEMENT

I accept the responsibility for the information and DoD system to which I am granted access and will not exceed my authorized level system access. I understand that my access may be revoked or terminated for non-compliance with DoD security policies. I accept responsibility to safeguard the information contained in these systems from unauthorized or inadvertent modification, disclosure, destruction and use. I understand and accept that my use of the system may be monitored as part of managing the system, protecting against unauthorized access and verifying security problems. I agree to notify the appropriate organization that issued my account(s) when th cess is no longer required.

*I Agree

6

7

SUBMIT

Type the code from the ir

The code is not case sensitive.

Contact Us | Suggestion Box

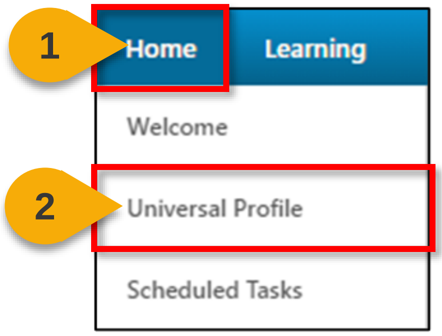
DAU Help Desk 703-805-3459 | 1-866-568-6924

**IMPORTANT:** If there was any information that was not filled in correctly, there will be red text in the area of the form that requires your attention for correction. Afterwards, you will need to select the "**I Agree**" check box again and enter the new code in the image box for your SAAR to be submitted. Select the "**Submit**" button once you have completed the form. Afterwards the screen below will be generated.

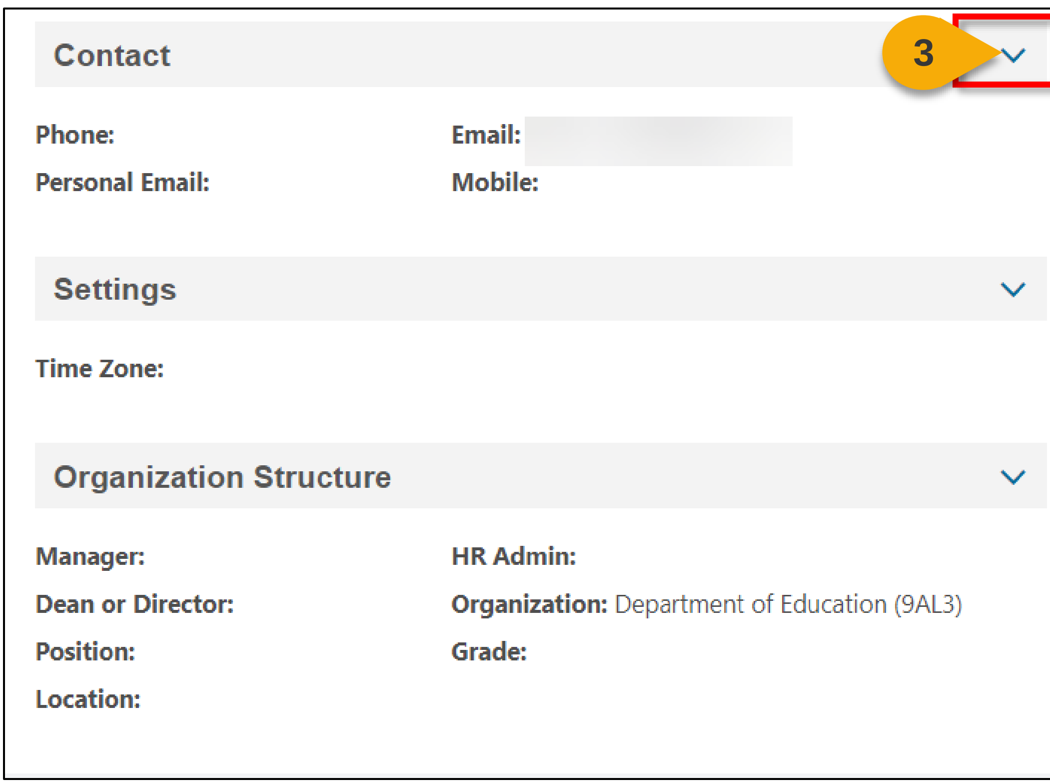
# View User Record

*When you want to view your User Record…*

**Steps 1 & 2: Hover over the Home tab, then select the Universal Profile tab. You will be taken to the User Record page.**



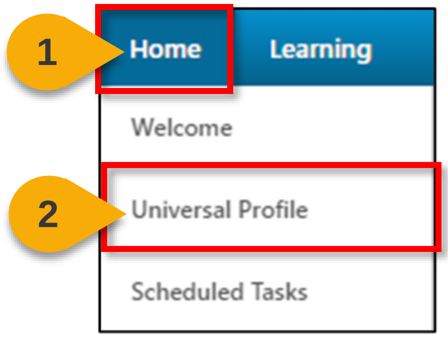

**Step 3: To expand a section, click on the arrow to the right of that section.**



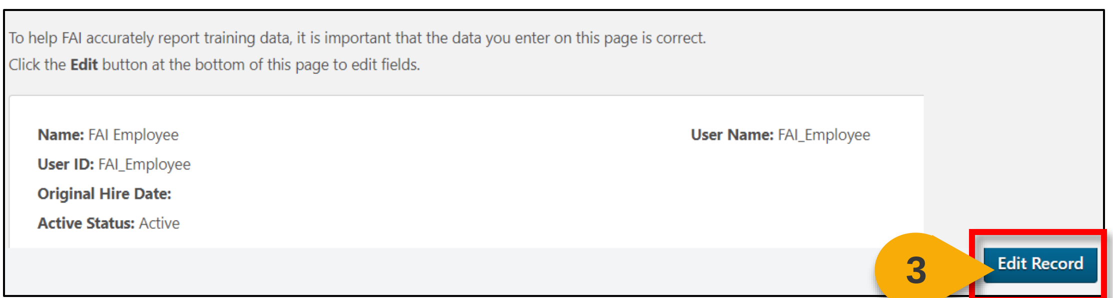
# Edit User Record

*When you want to edit information on the user record…*

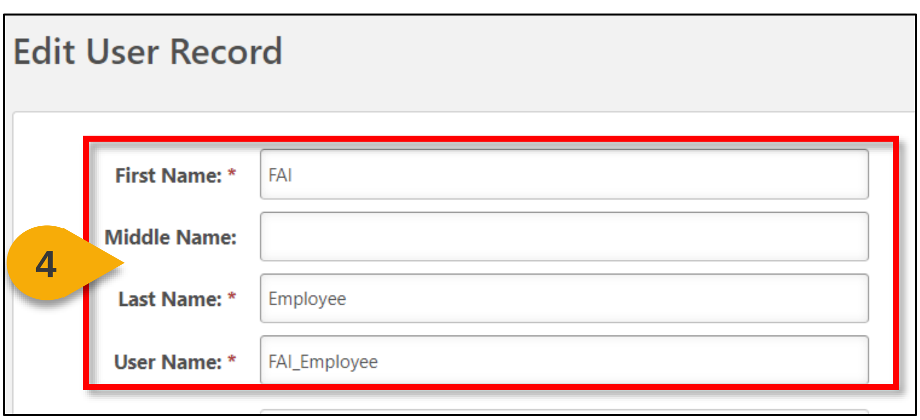
**Steps 1 & 2: Hover over the Home tab, then select the Universal Profile tab. You will be taken to the User Record page.**




**Step 3: Click the Edit Record button at the bottom left side of the screen to edit your User Record.**

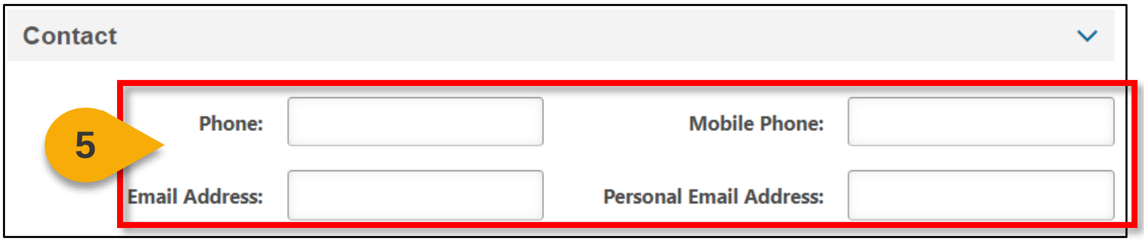



**Step 4: In the first section at the top of the screen, you can edit your First Name, Middle Name, Last Name, and User Name.**

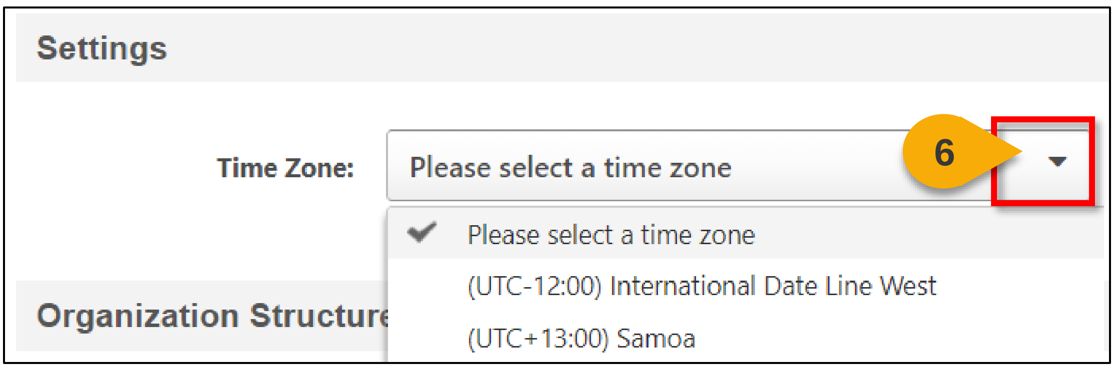


# Edit User Record (Cont.1)

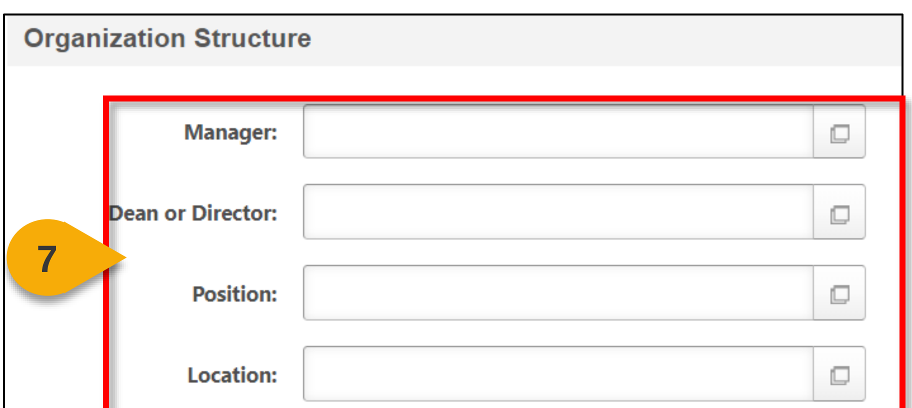
**Step 5:** In the Contact section, you can fill in your **Phone, Mobile Phone, Email Address, and Personal Email Address.**




**Step 6:** In the Time Zone section, you can click the dropdown to select the appropriate time zone for your location.

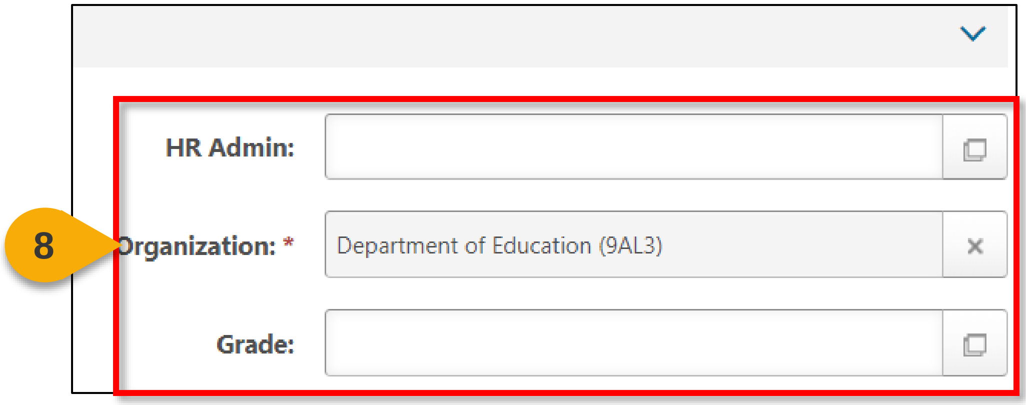



**Step 7**: In the Organization Structure section, you can input your **Manager, Dean or Director, Position, Location**.

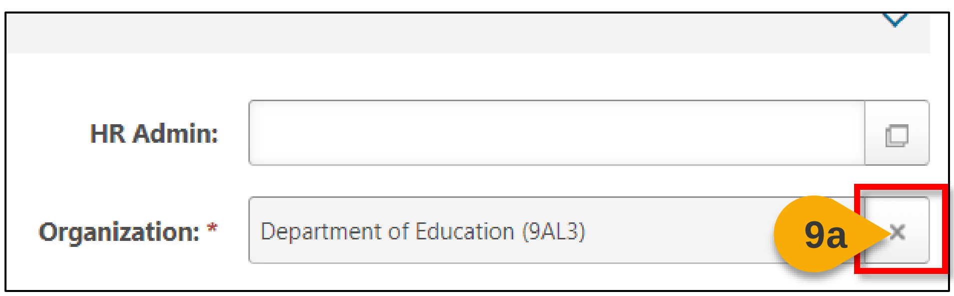


# Edit User Record (Cont.2)

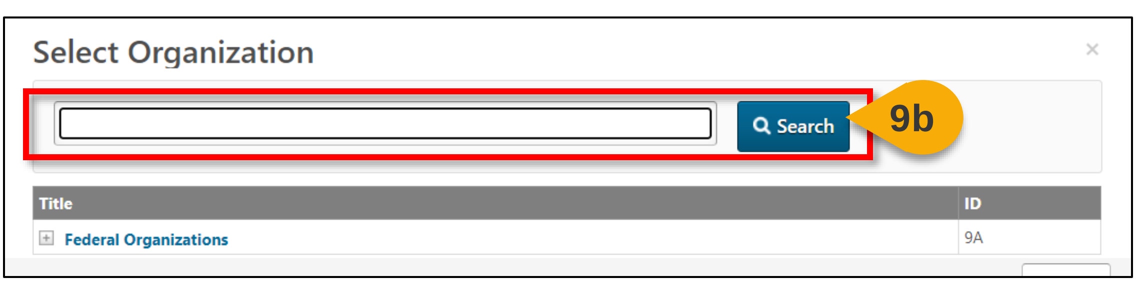
**Step 8: In the Organization Structure, you can also edit the HR Admin, Organization, and Grade.**




**Step 9a: To search for your organization, Click on the box next to Organization. A popout box will appear.**

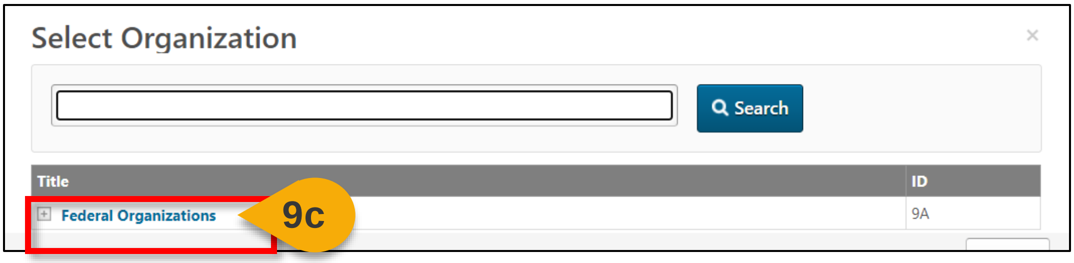



**Step 9b: You can manually enter the name of your organization in the search box.**

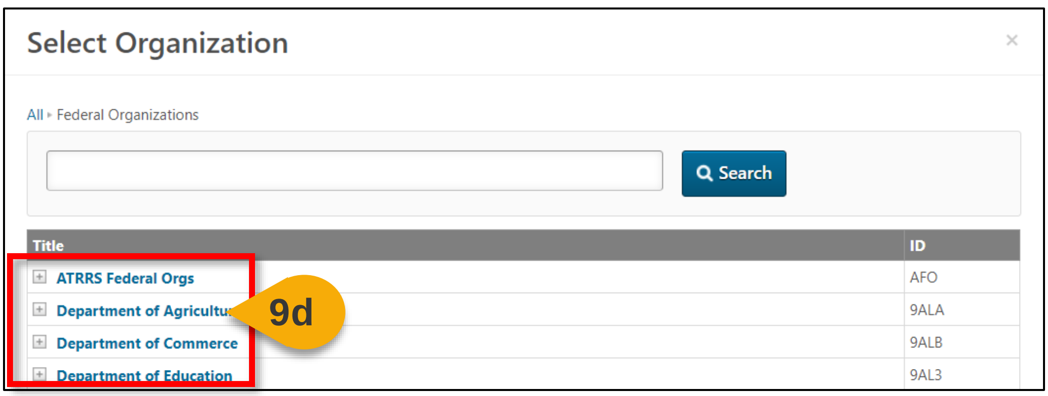


# Edit User Record (Cont.3)

**Step 9c: You can also click Federal Organization to drill down to see more organizations and search manually.**



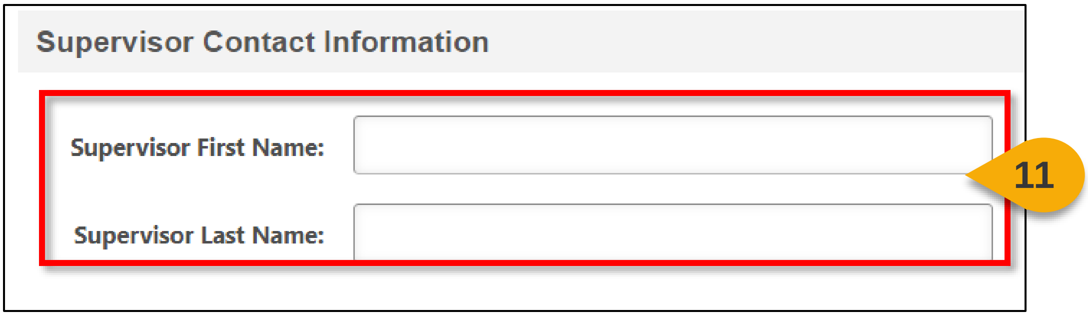

**Step 9d:** Click on the name of your **organization** to add it to your User Record.



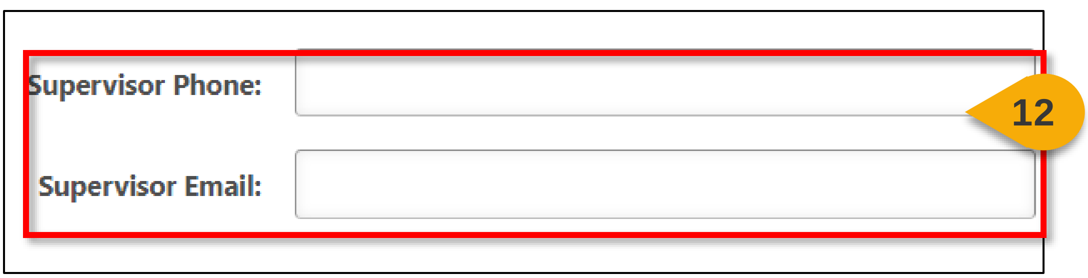

**Step 10: In the Other Demographics section, you have the option to fill in additional information on your demographics such as Work City, Zip Code, Disability, etc.**

# Edit User Record (Cont.4)

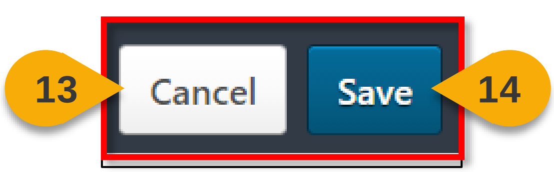
**Step 11: In the Supervisor Contact Information section, you can fill in the first and last name of your supervisor.**




**Step 12:** In the Supervisor Contact Information section, you can also enter your **Supervisor's Phone and Email**.



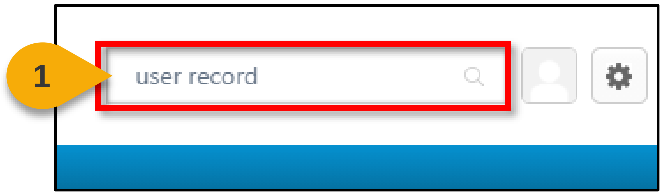

**Steps 13 & 14: Click Save to keep all the changes or click Cancel to discard the changes.**



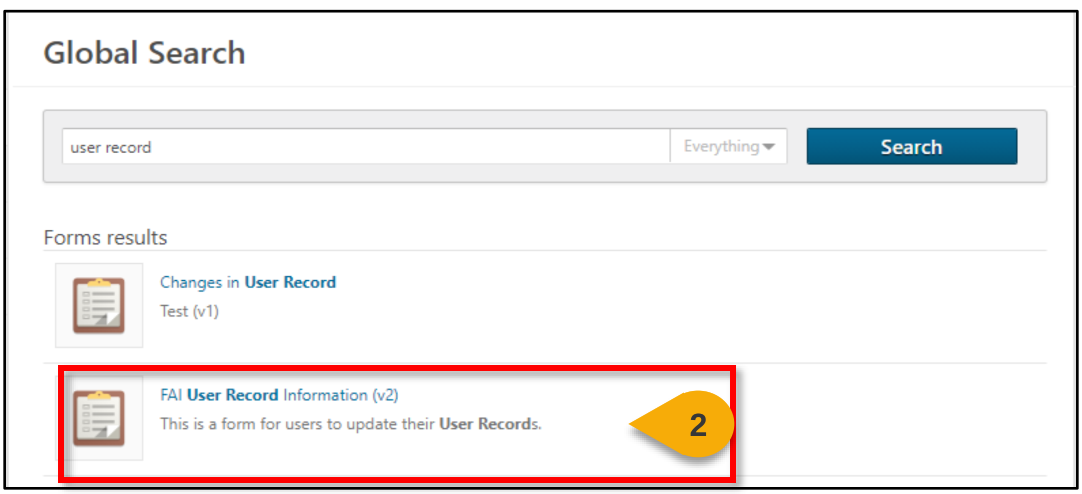
# Edit User Record via Advanced Forms

*When you want to edit the User Record using Advanced Forms…*

**Step 1: In the Global Search box, type "User Record" and click the magnifying glass.**

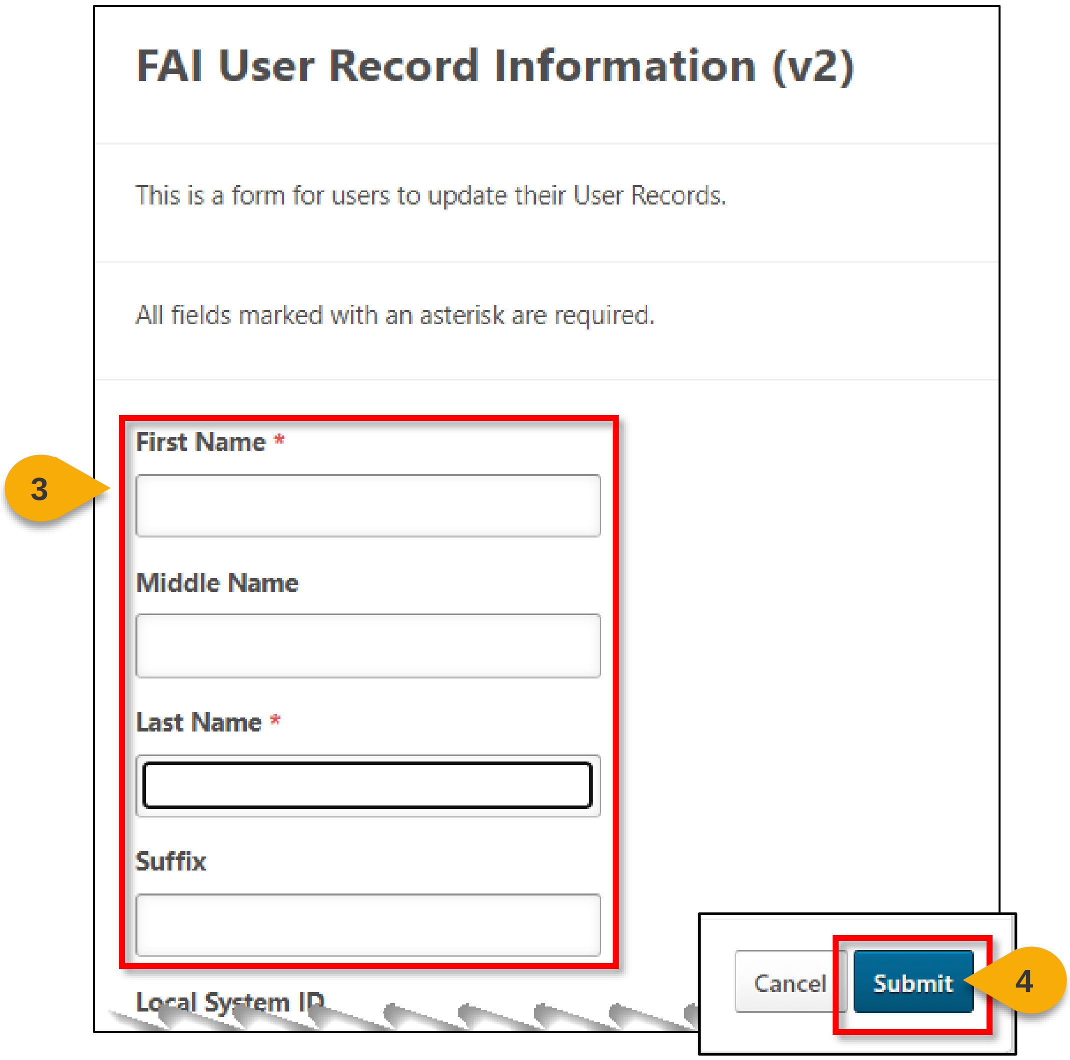



**Step 2: Select the FAI User Record Information form.**



# Edit User Record via Advanced Forms (Cont.1)

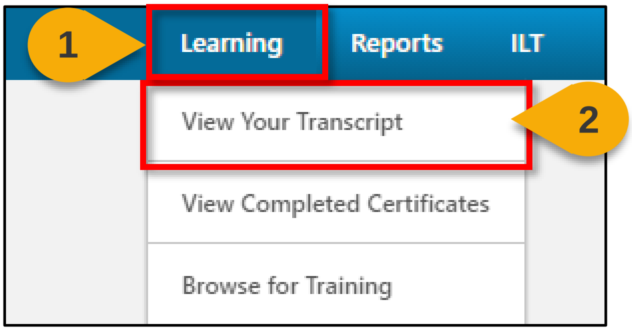
**Steps 3 & 4: Fill in the form and click Submit at the bottom of the page when finished. Fields with a * are required. You will see the changes reflected on your User Record immediately.**



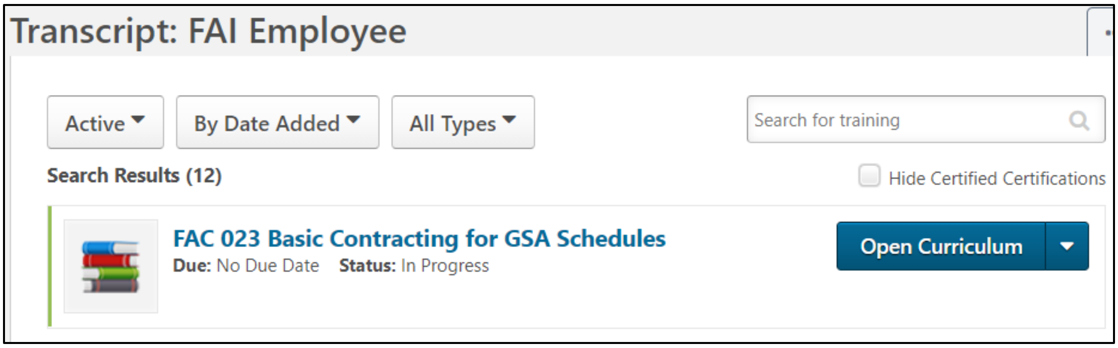
# View Transcript

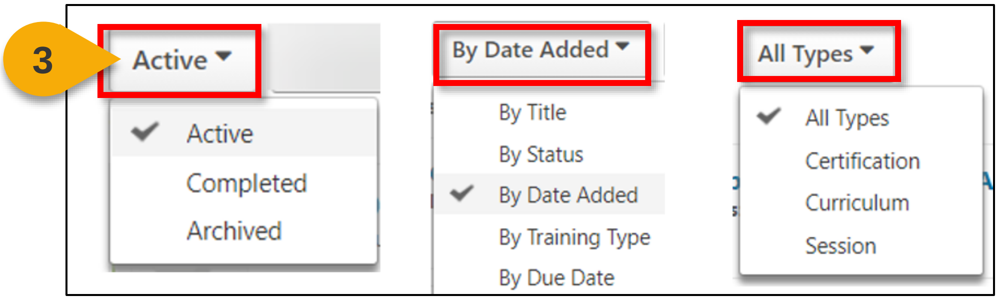
*When you want to view your Transcript…*

**Steps 1 & 2:** Hover over the **Learning tab** and then select **View Your Transcript.**




**Step 3: You will be taken to your Transcript. You can click the dropdown arrow filter to show Active, Completed, and Archived courses. By default, only active courses you have not completed will be listed. Click on the arrows by each filter for dropdowns to sort the courses.**

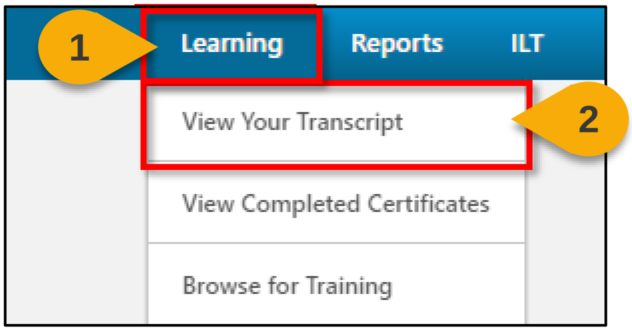


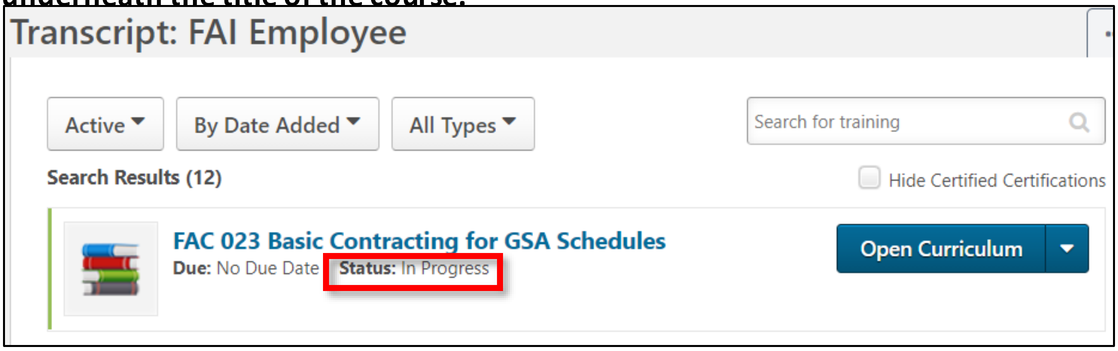
# View Transcript Status

*When you want to view your Transcript status…*

**Steps 1 & 2: Hover over the Learning tab and then select View Your Transcript.**



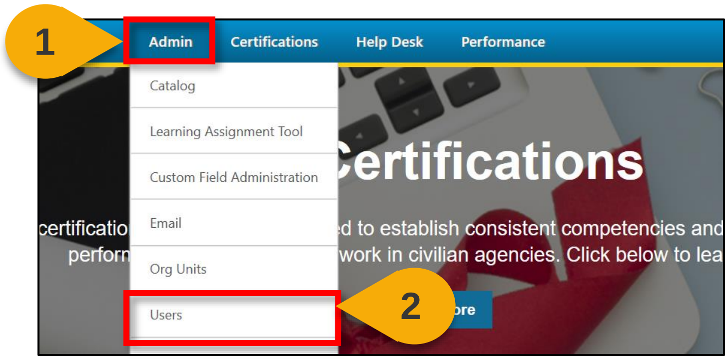

**Your Transcript will display in the screen. The status of your courses will be listed underneath the title of the course.**



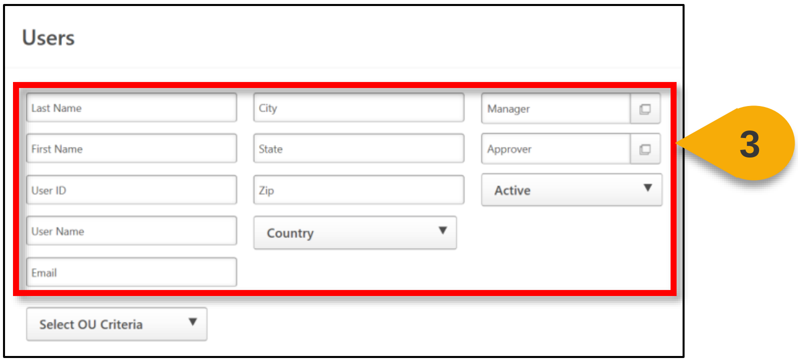
# Search for a User

*When you want to look up a User…*

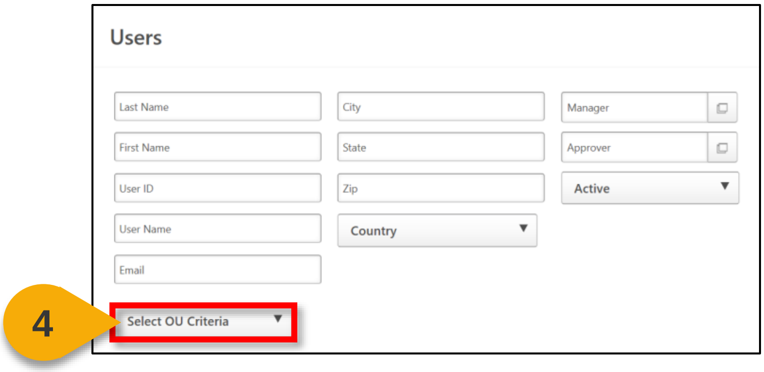
**Steps 1 & 2:** Hover over the **Admin** tab and then select **Users**.




**Step 3:** Enter User information into the **search fields**.



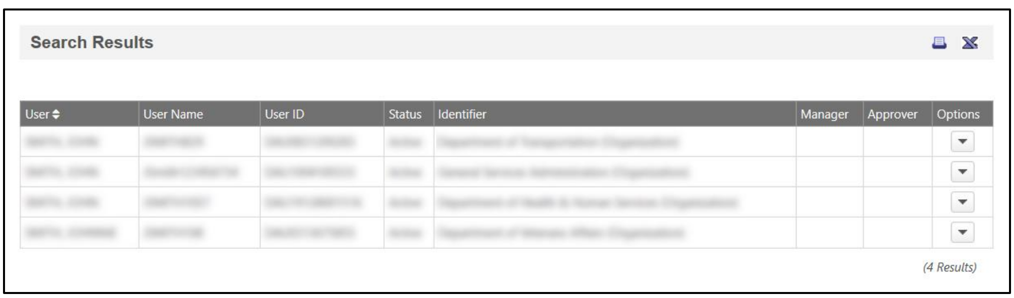

**Step 4:** Click on **Select OU Criteria** to further filter your search if desired.



# Search for a User (Cont.1)

**Step 5: Hit enter or click Search.**

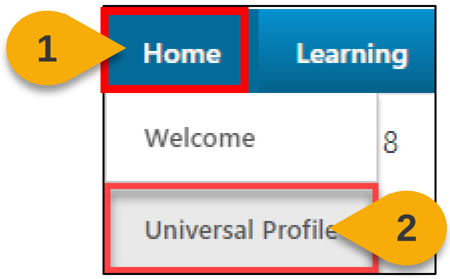

**The search results will populate. From here you can view the User Record or Transcript for the User. See the “View User’s Record” and “View User’s Transcript” task aids for more information on how perform these functions.**



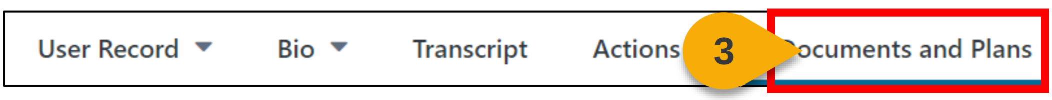
# View User’s Record

*When you want to view your subordinate’s user record…*

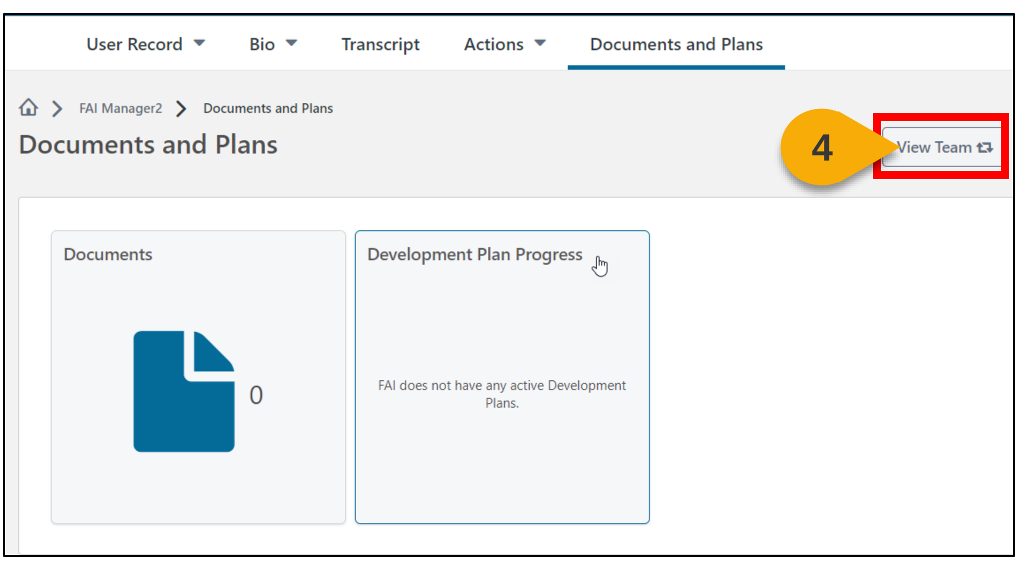
**Steps 1 & 2:** Hover over **Home,** then select **Universal Profile.**




**Step 3:** Click on **Documents and Plans.**

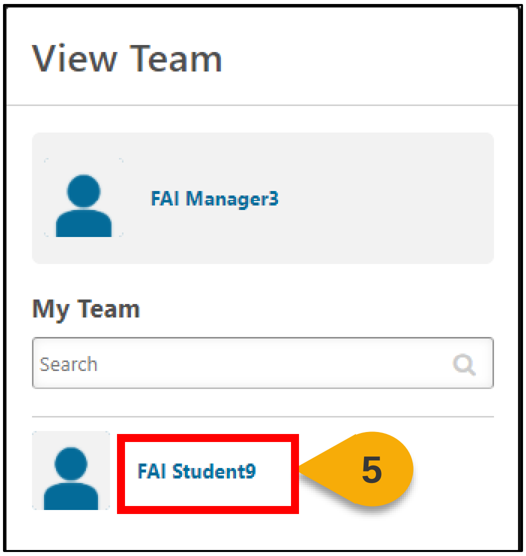



**Step 4:** Click on **View Team.**

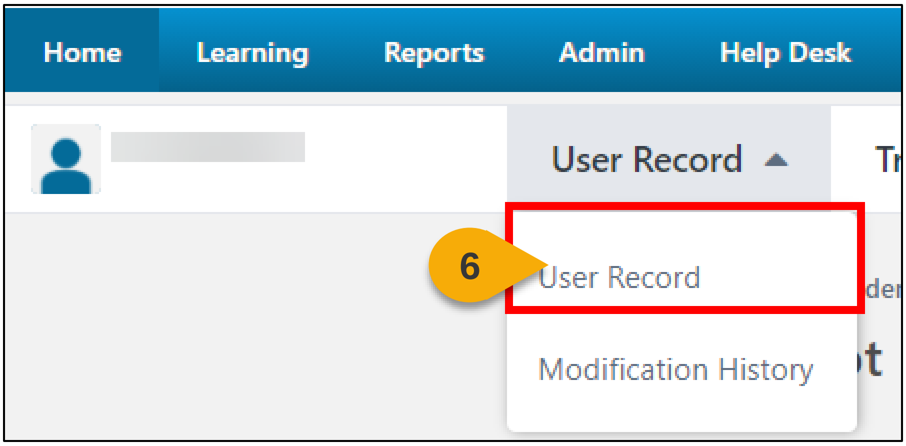


# View User’s Record (Cont.1)

**Step 5**: Select the **name** of the user whose record you’d like to view.




**Step 6:** You will now see your subordinate’s account. Click on **User Record**.



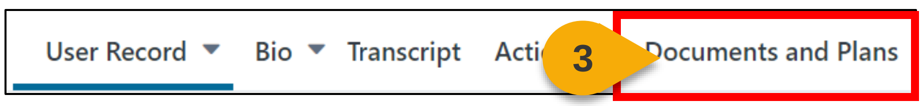

**Note:** Using the breadcrumbs on the page will take you back to YOUR User Record, not your subordinates.

# View User's Transcript

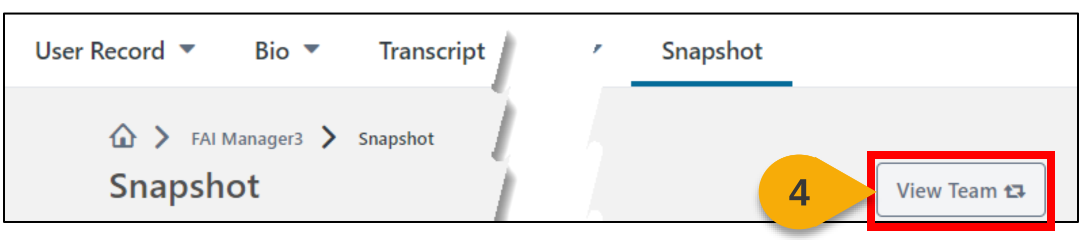
*When you want to view your subordinate's transcript…*

**Steps 1 & 2:** Hover over **Home,** then select **Universal Profile.**


**Step 3:** Click on **Documents and Plans.**



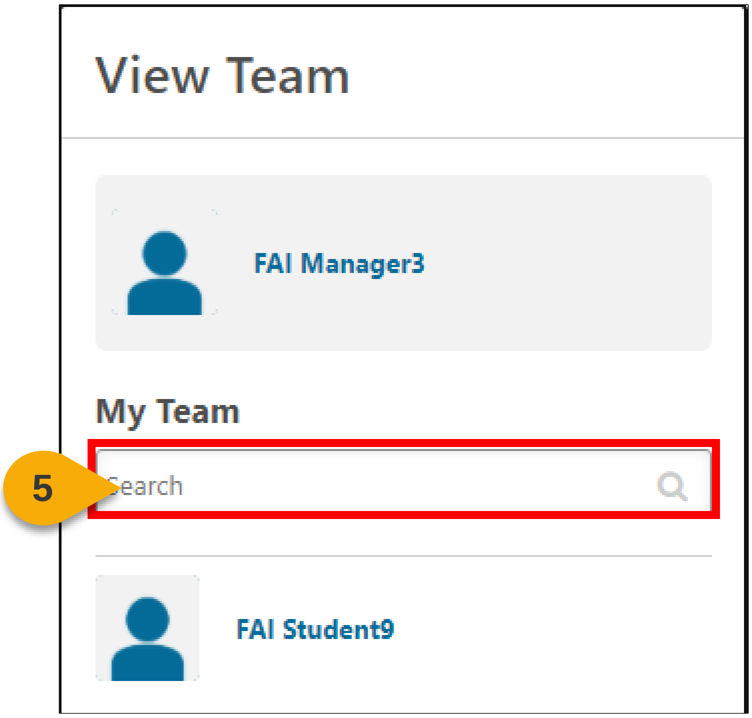

**Step 4:** Click on **View Team.**



# View User's Transcript (Cont.1)

**Step 5**: A popup window will show your direct reports. Search for specific reports using the **Search bar**.

**Step 6:** After selecting the Employee whose transcript you'd like to view, you will be taken to their transcript.



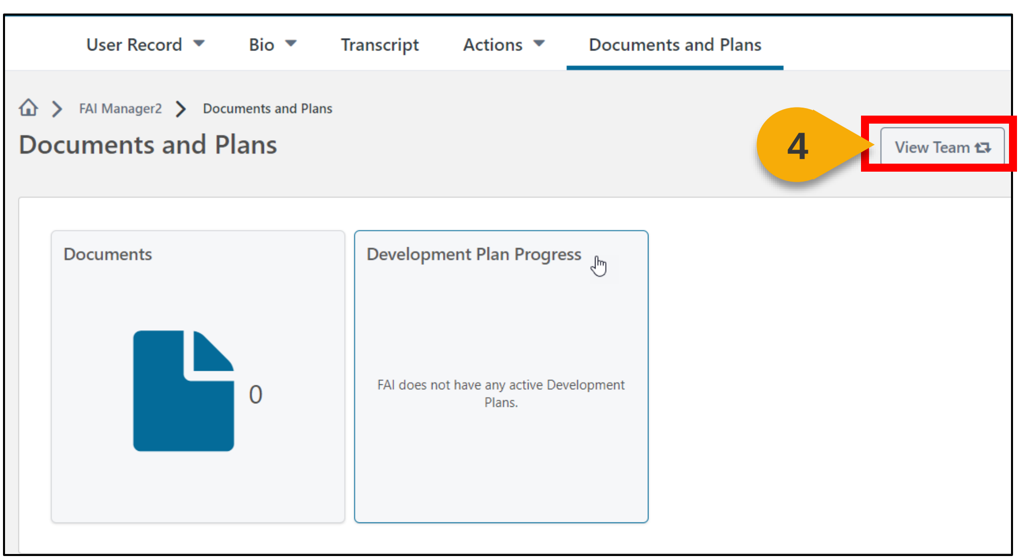
# View Your Team

*When you want to view all the members of your team…*

**Steps 1, 2: Hover over Home > select Universal Profile.**

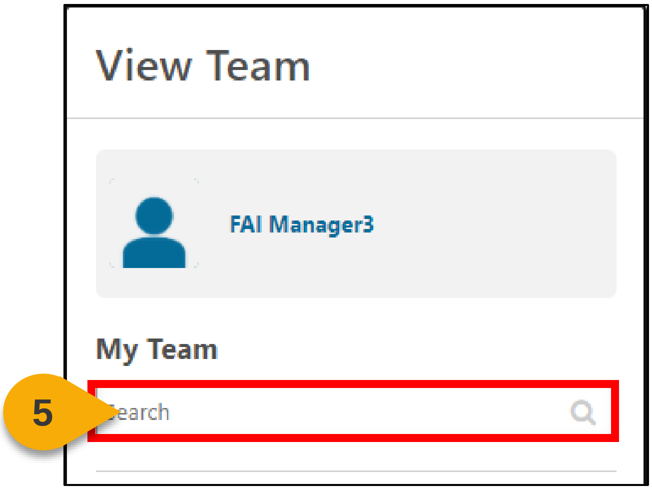

**Step 3:** Click on **Documents and Plans.**


**Step 4:** Click on **View Team.**



# View Your Team (Cont.1)

**Step 5: A popup window will show your direct reports. Search for specific employees by using the Search bar.**

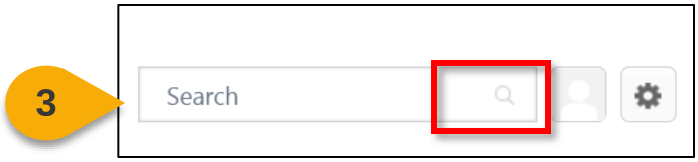


# Use Global Search

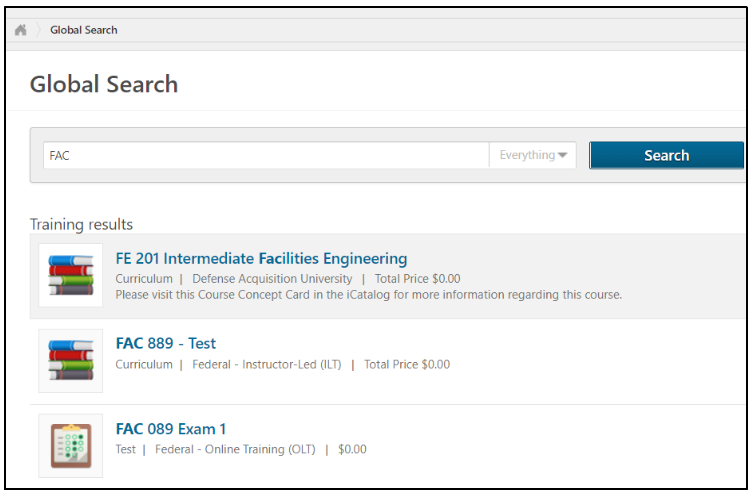
*When you want to search for Training, Certifications, or Forms…*

**Global Search: This predictive search bar, found at the top right of the home page, helps users search for training, certification and forms.**

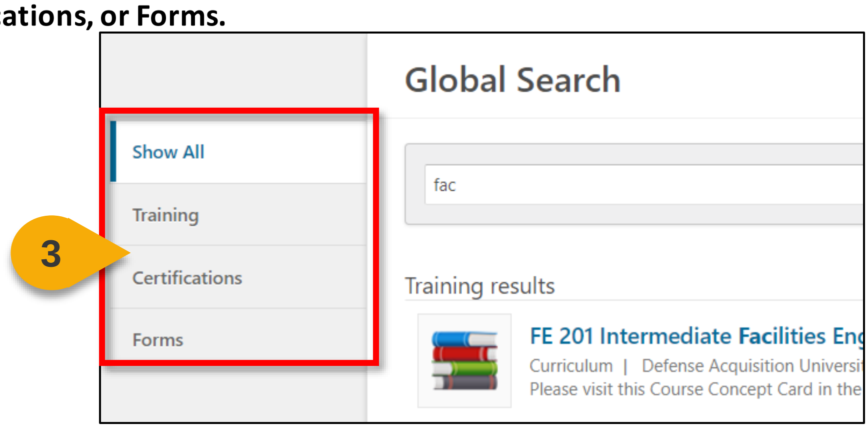
**Step 1: Enter your desired Search Terms and click the Magnifying Glass or hit enter to search.**




**The page will refresh, and your results will be listed on the page.**




**Step 2: To the left of the search bar, you can choose to filter by Training, Certifications, or Forms.**

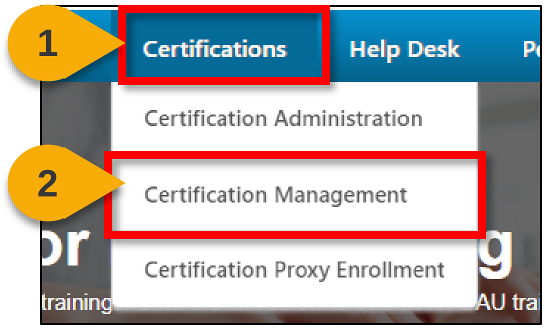


# External Training

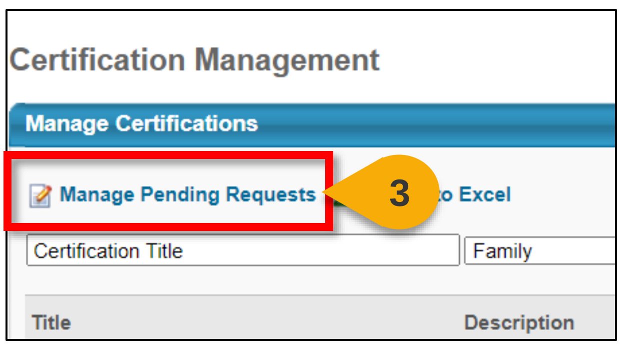
# Approve or Deny External Training Request

*When you want to approve or deny an external training request…*

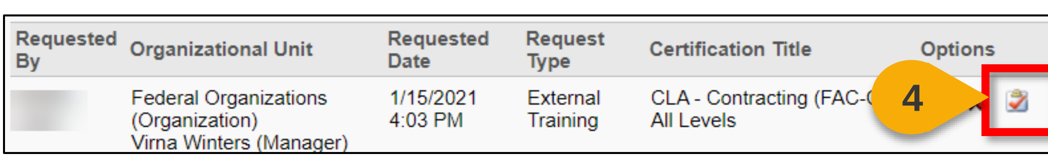
**Steps 1 & 2:** Hover over the **Certifications** tab and then click **Certification Management**.




**Step 3:** At the top of the page, click the **Manage Pending Requests** link.

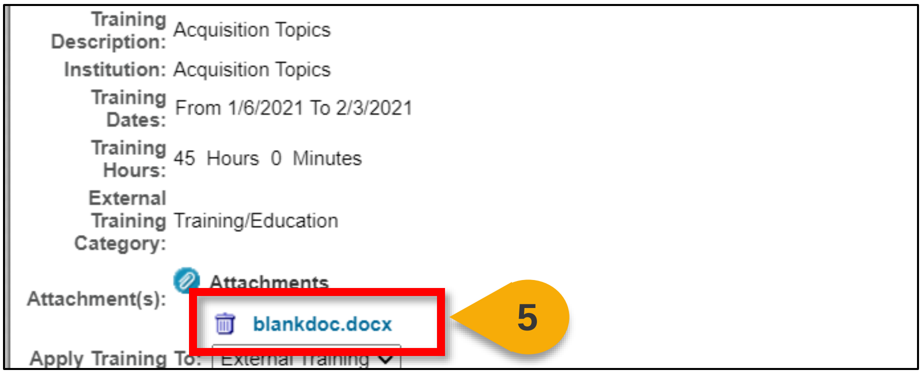



**Step 4:** You will see all Pending External Training Requests for Certifications you are a Certification Owner for. For each item you wish to take action on, click the **clipboard** icon to manage the request.

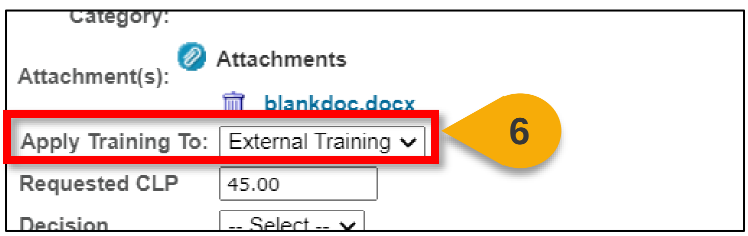


# Approve or Deny External Training Request (Cont.1)

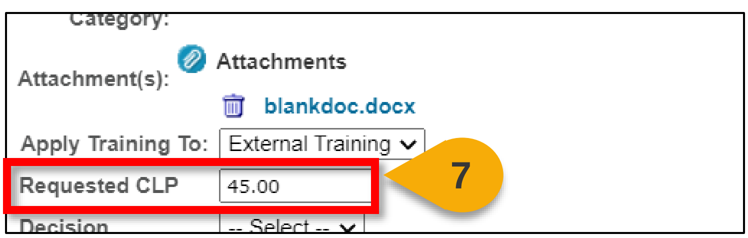
**Step 5:** Review the information entered by the User who submitted the request. Click the **links** in the Attachments field to view the attachments provided by the User.




**Step 6:** In the Apply Training To field, ensure the User has selected **External Training** to add the CLPs to the External Training section of the Certification.

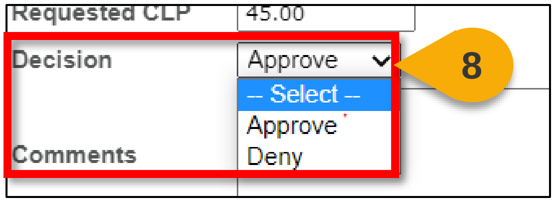



**Step 7:** If necessary, adjust the CLPs for this External Training by editing the **Requested CLP** field.

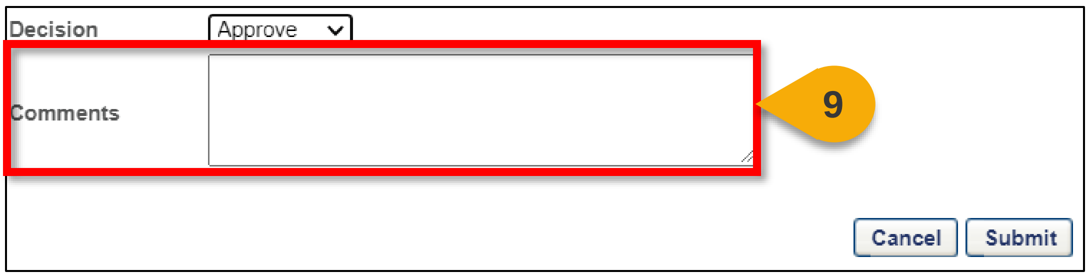


# Approve or Deny External Training Request (Cont.2)

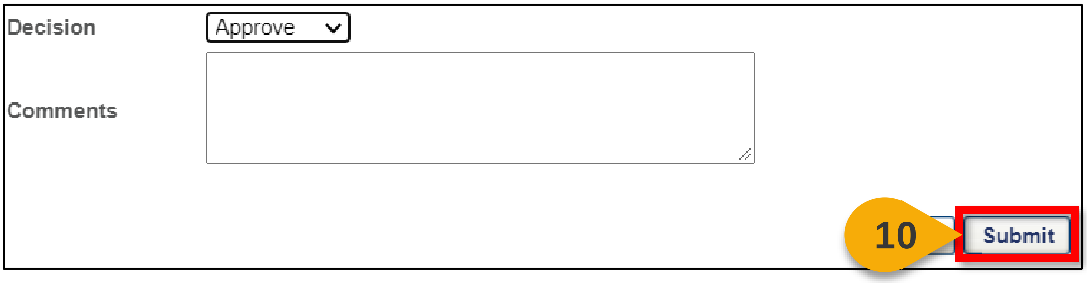
**Step 8:** Use the **Decision** drop-down to indicate whether the request is Approved or Denied.




**Step 9:** Enter comments in the **Comments** field to justify the approval or denial.



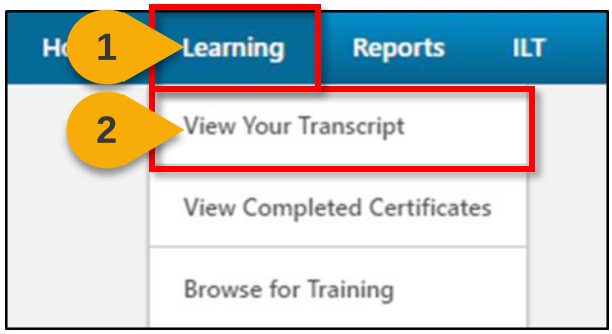

**Step 10:** Click **Submit**. The approval or denial will process and be updated on the User's Transcript. You will be returned to the View Certification Requests page.



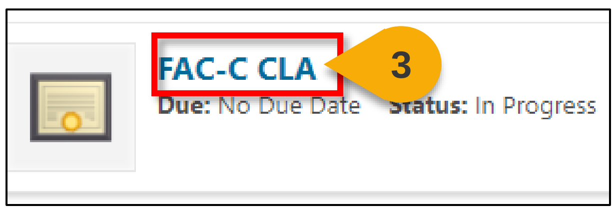
# Request External Training Credit Within a Certification

*When you want to request external credit from within the certification…*

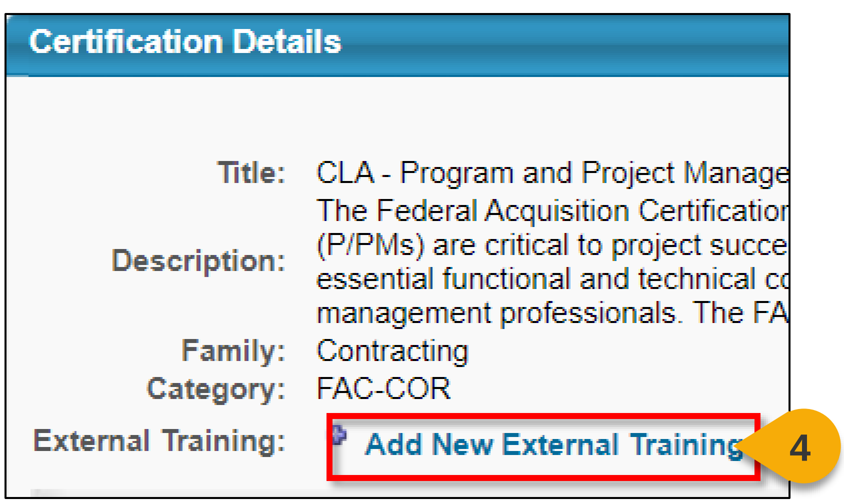
**Steps 1 & 2**: Hover over the **Learning** tab and click **View Your Transcript.**




**Step 3**: Click on the **title of the certification** where you want to add an external training.

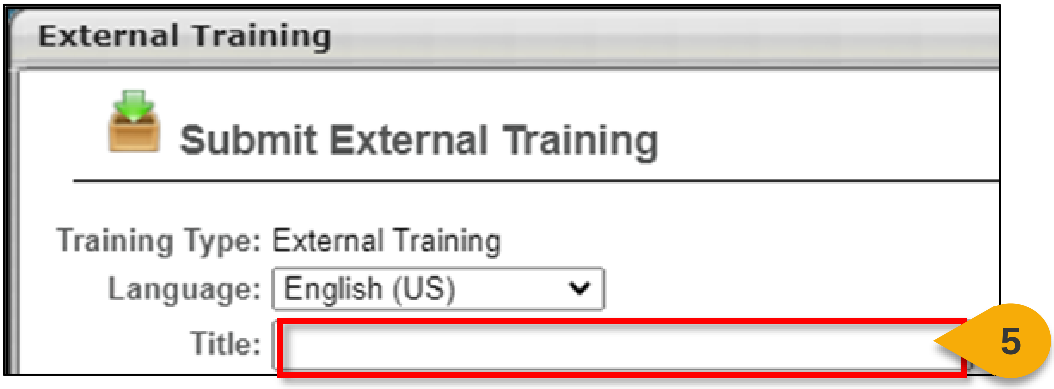



**Step 4**: Click on **Add New External Training.**

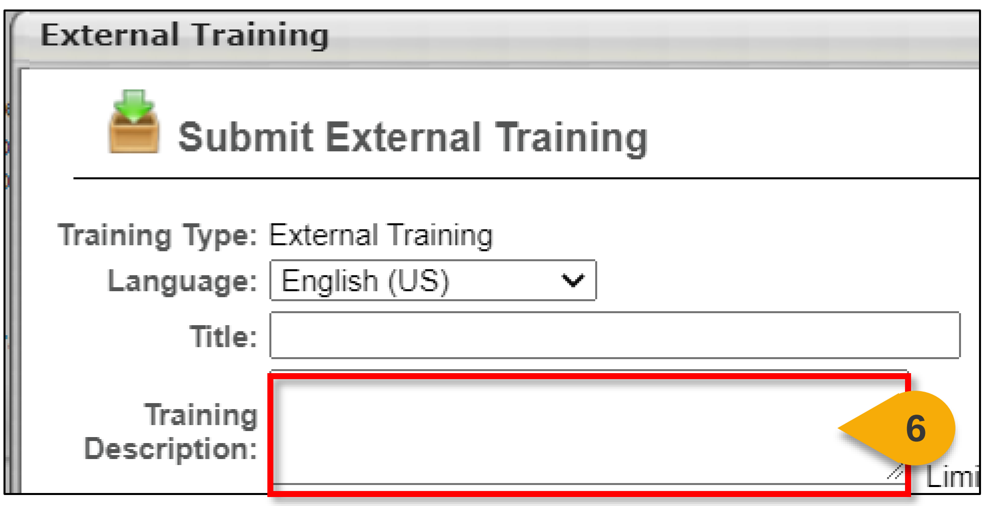


# Request External Training Credit Within a Certification (Cont.1)

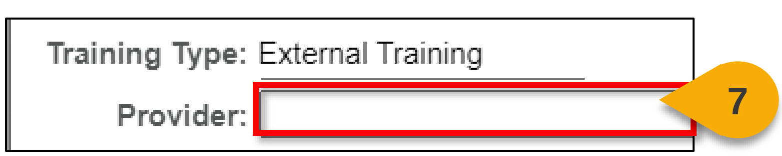
**Step 5:** A popup will appear. Enter the **title** in the Title field.




**Step 6:** Enter a description of the external training into the **Training Description** field.

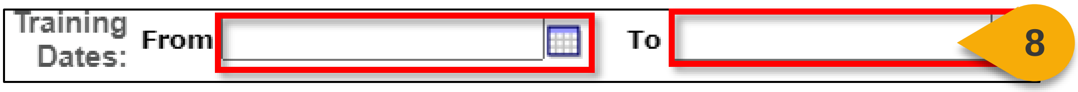



**Step 7:** Enter the name of the institution into the **Institution** field.

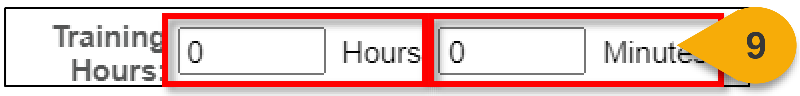


# Request External Training Credit Within a Certification (Cont.2)

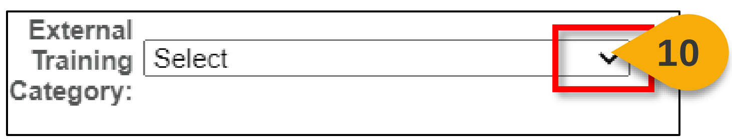
**Step 8:** Enter the dates of your external training in the **Training Dates** field.



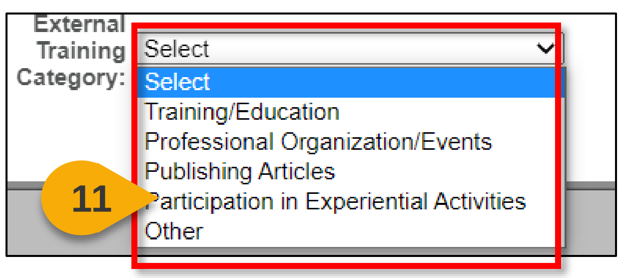

**Step 9:** Enter the number of hours and minutes of the external training into the **Training Hours** text fields.



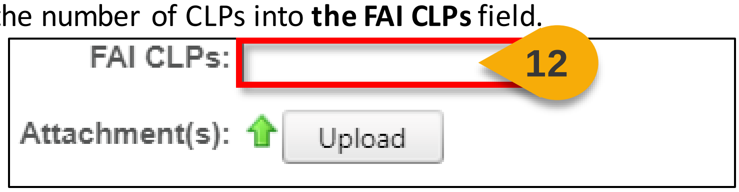

**Step 10:** Click the **dropdown button** next to the External Training category field




**Step 11:** Select the applicable type of training from **the External Training Category dropdown.**



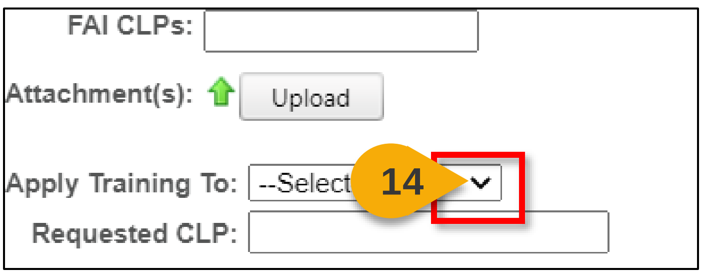

**Step 12**: Enter the number of CLPs into **the FAI CLPs** field.



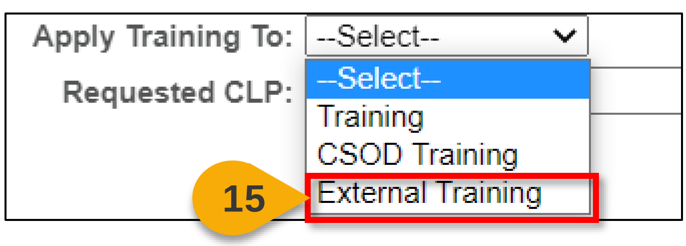
# Request External Training Credit Within a Certification (Cont.3)

**Step 13:** Click **Upload** to add any supporting documents to the Attachments section if necessary.

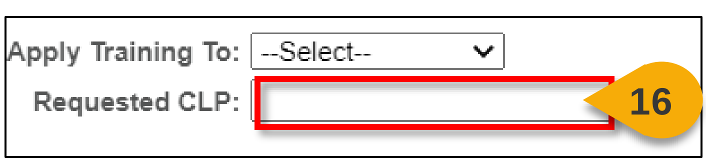

**Step 14:** Click the **dropdown button** next to the Apply Training To field.




**Step 15:** Select **External Training** from the dropdown.

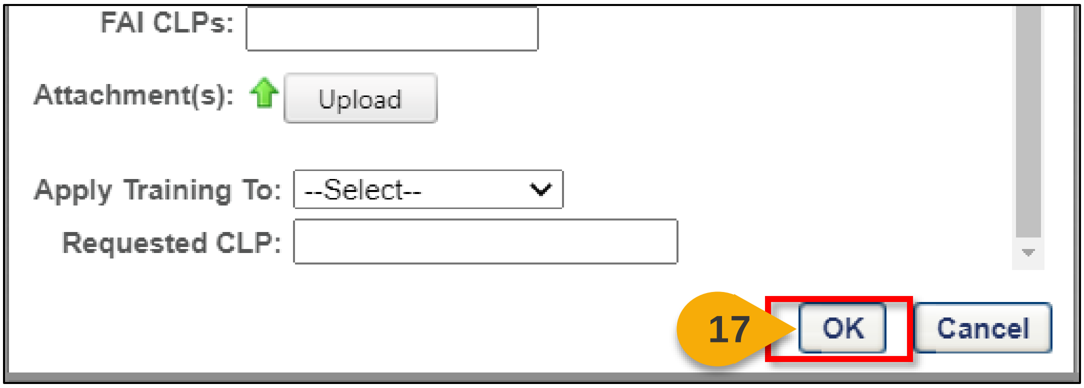



**Step 16:** Enter the number of CLPs earned in the **Requested CLP** field.



# Request External Training Credit Within a Certification (Cont.4)

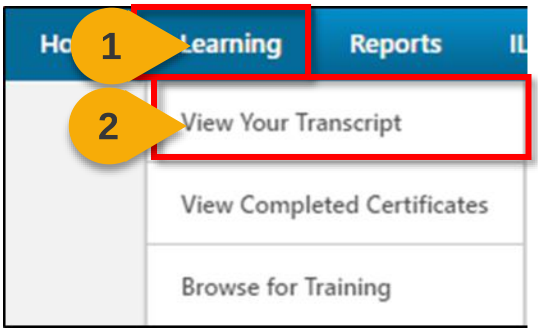
**Step 17:** Click **Ok** when you you've finished entering the information on your external training. This will submit the form to an External Training Approver.



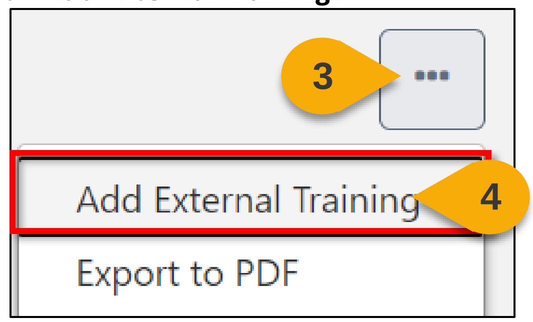
# Request External Training Credit from Transcript

*When you want to add an external training to your Transcript…*

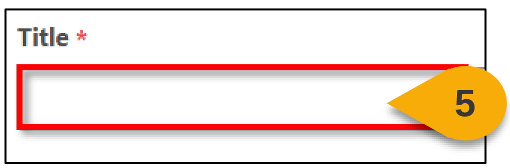
**Steps 1 & 2: Hover over the Learning tab and click View Your Transcript.**



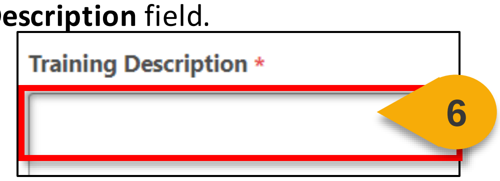

**Steps 3 & 4:** Click on the **ellipsis** button at the top left-hand corner. Then click on **Add External Training**.



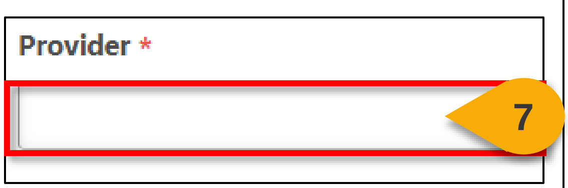

**Step 5:** Enter the title of your external training in the **Title** field.



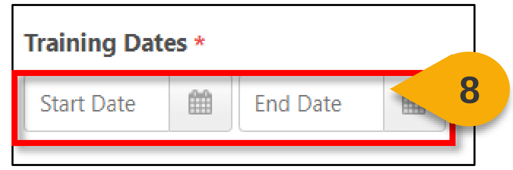

**Step 6:** Enter a description of the external training in the **Training Description** field.



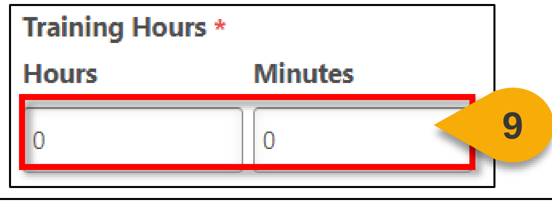

**Step 7:** Enter the name of the provider of the external training in the **Provider** field.




**Step 8:** Enter the start and end dates of your external training in the **Start Date** and **End Date** fields.

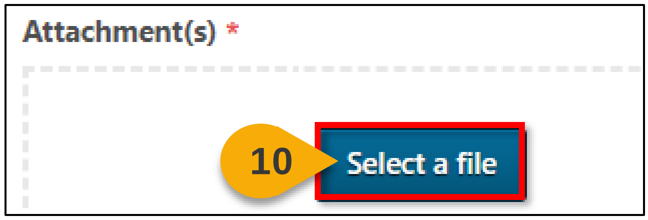



**Step 9:** Enter the training hours for your external training in the respective **Hours** and **Minutes** fields.



# Request External Training Credit from Transcript (Cont.1)

**Step 10**: Click **Select File** to add proof of your successful completion of your External Training.

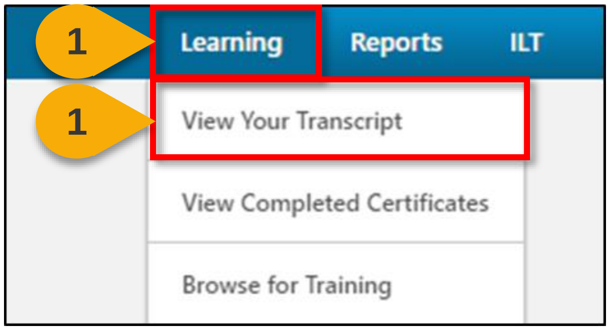



**Step 11:** Click **Submit** to submit the form for approval.

# Add External Training to a Certification

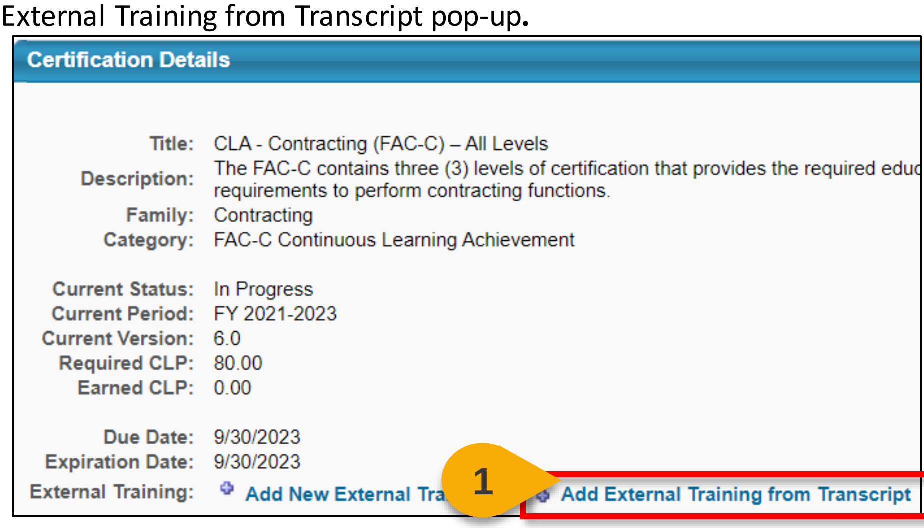
*When you want to submit external training from your transcript to fulfill a certification requirement…*

**Steps 1 & 2:** Hover over the **Learning** tab and then click **View Your Transcript**.



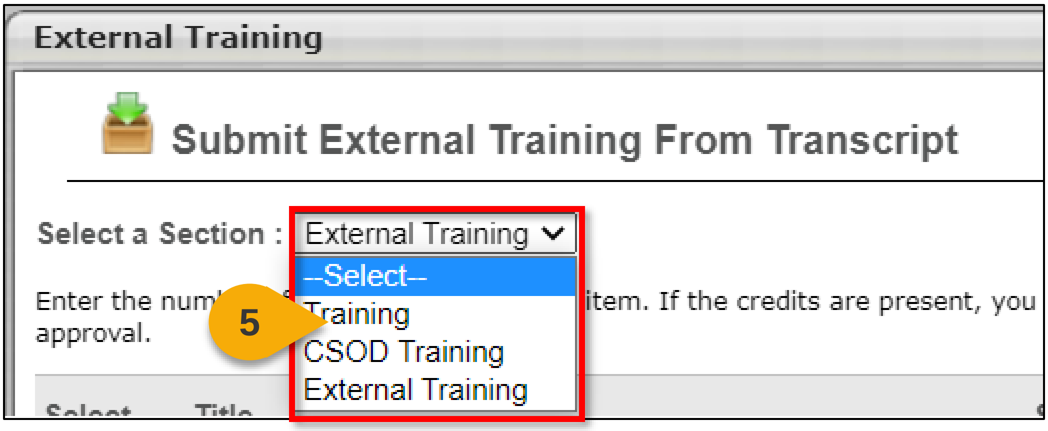

**Step 3:** Click on the **title of the Certificate** to which you'd like to add your external training.


**Step 4**: Click the **Add External Training** from Transcript link. This opens the Submit External Training from Transcript pop-up.

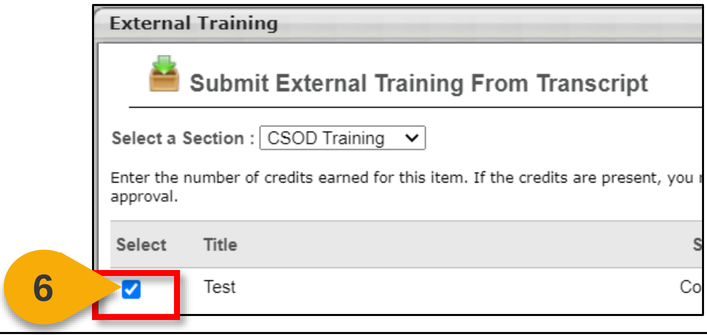


# Add External Training to a Certification (Cont.1)

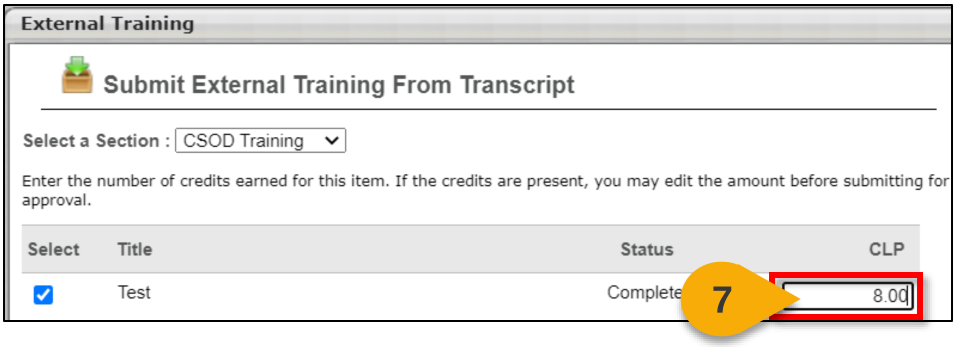
**Step 5:** Click the **dropdown** next to Select a Section to choose the section of the .certificate that the training will be applied to




**Step 6:** Mark the **checkbox** next to the training item that you'd like to submit external training for.

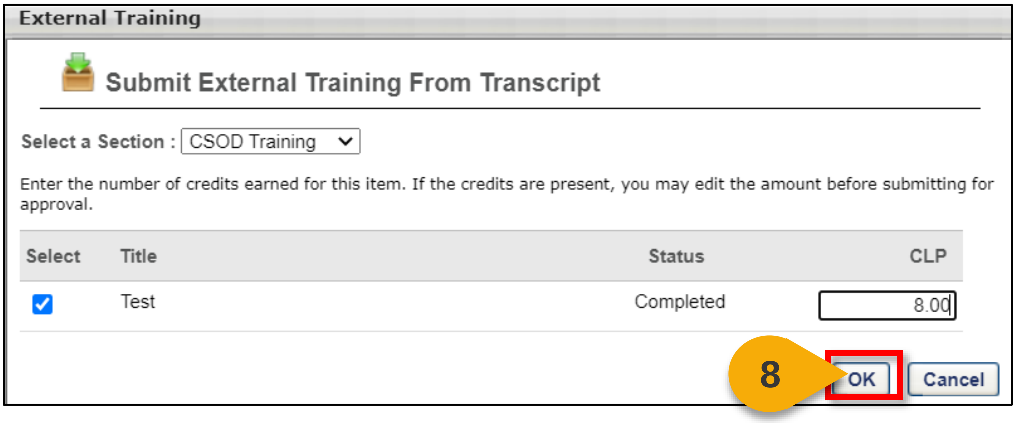



**Step 7:** In the CLP field to the right of the training item, enter the **number of credits** that were earned from the External Training.

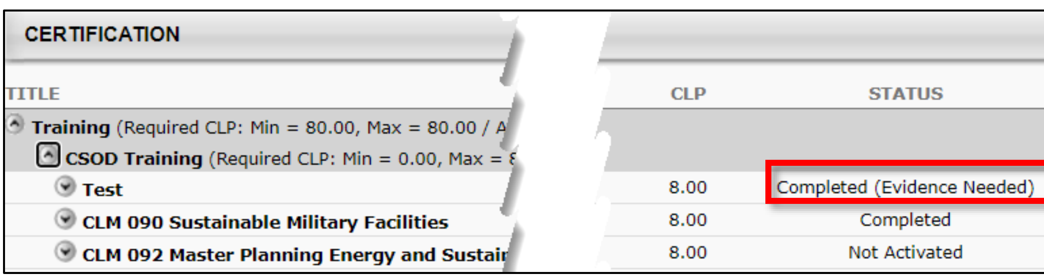


# Add External Training to a Certification (Cont.2)

**Step 8:** Click **OK** to submit the training for approval. If multiple training items are selected, each item is submitted as a separate request to the certification owner, even though they are submitted at the same time.




Your External Training will be submitted for approval. The status of the training will be marked as Completed(Evidence Needed) until approved.

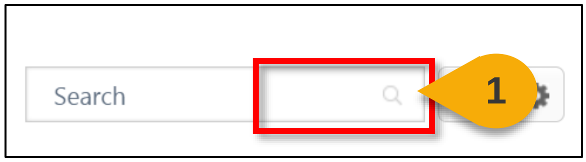


# Online Training

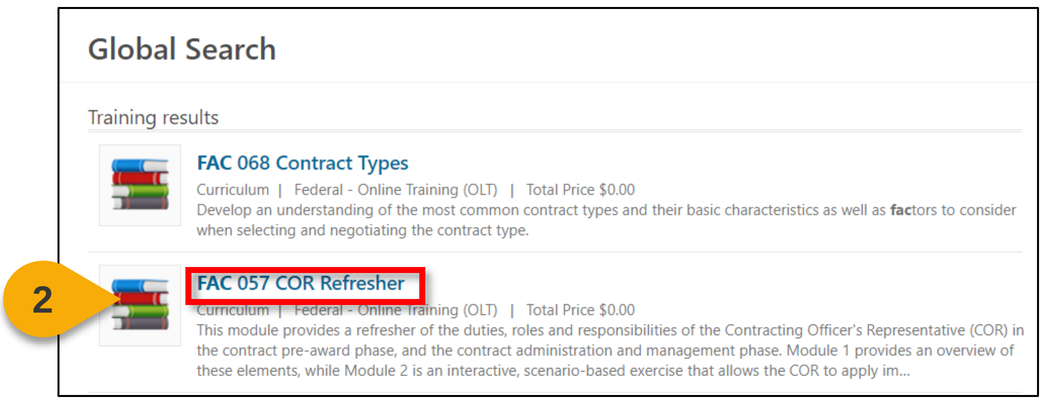
# Register for Online Training (OLT)

*When you want to register for Online Training…*

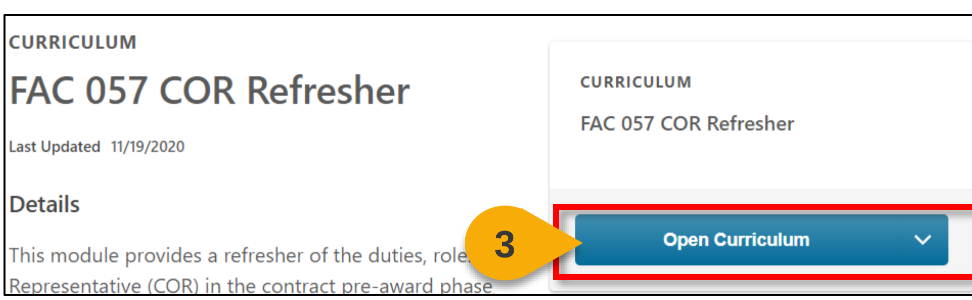
**Step 1: Type the name of the OLT you would like to take into the Global Search box and click the magnifying glass or hit enter.**

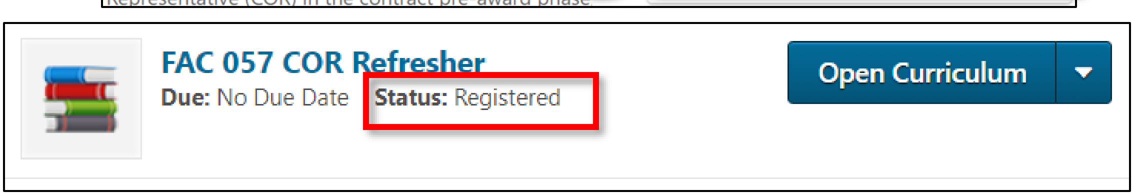



**Step 2: Your search results will appear on the next page. Click the title of the OLT you would like to take.**




**Step 3: Click the Open Curriculum button to register for the OLT. The course will then be added to your Transcript with a status of Registered.**



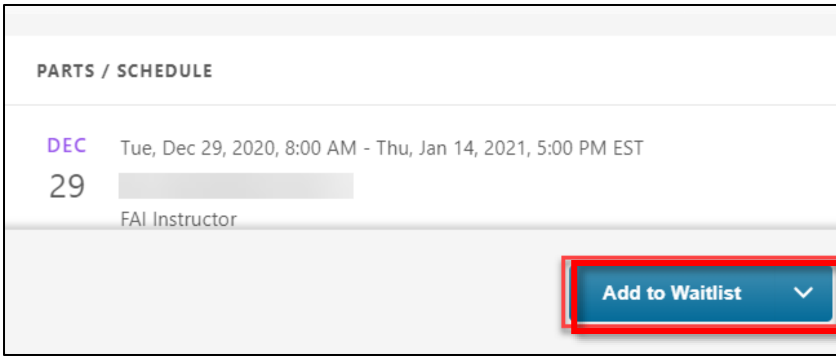



# Submit an Exception Request

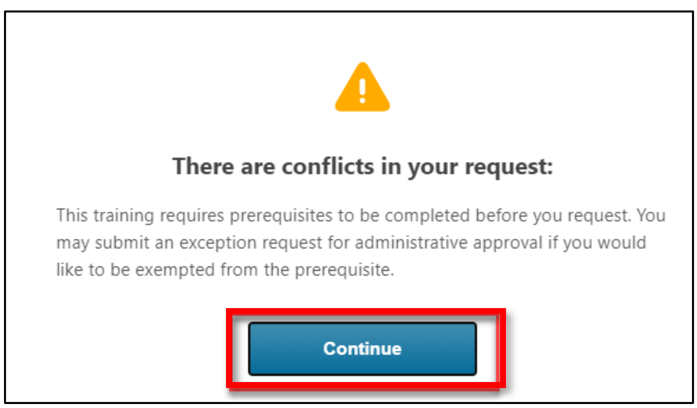
*When you want to submit an Exception Request for a course prerequisite…*

You will submit an Exception Request when you would like to register for a Session that has a prerequisite requirement that you do not meet. If granted, this request will allow you attend the course without having the prerequisite on your Transcript.

**Step 1: Select the Session you would like to join and click Add to Waitlist or Request.**




**Step 2: A Warning will pop-up. Select Continue to submit an Exception Request.**



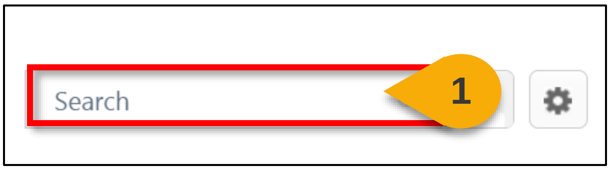

**Step 3**: The status for the session will change to **Exception Requested** on your transcript.

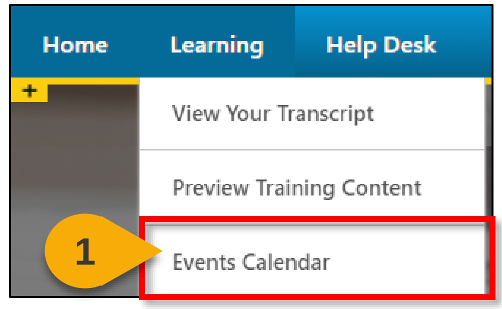
# Instructor-Led Training

# Register for Instructor-Led Training (ILT)

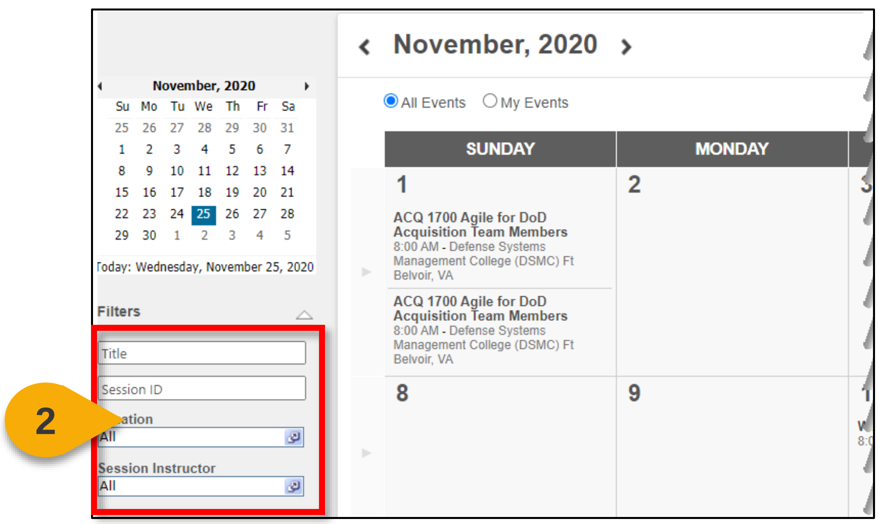
*When you want to register for an Instructor Led Training…*

**Step 1: Use Global Search or Events Calendar to find the instructor-led training course you'd like to take.**

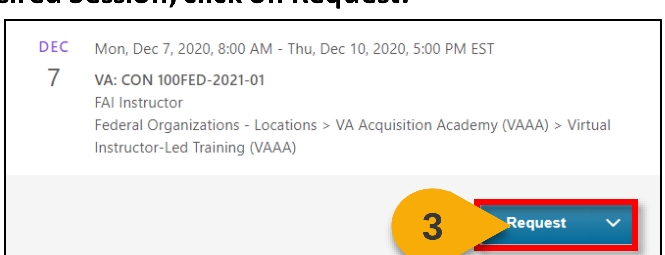



**Step 2: On the Events Calendar, you can search by Title, Session ID, Subject, or Instructor.**



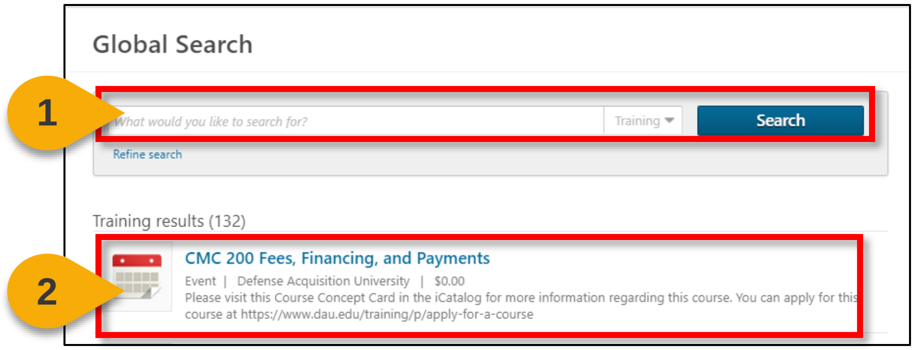

**Step 3: The Event will be displayed on the screen. You will see any available Sessions. Next to the desired Session, click on Request.**



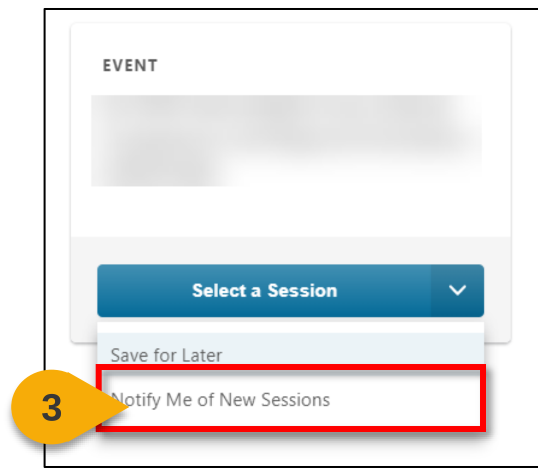
# Indicate Interest in a Future Session

*When you want to express interest in a course once new Sessions become available…*

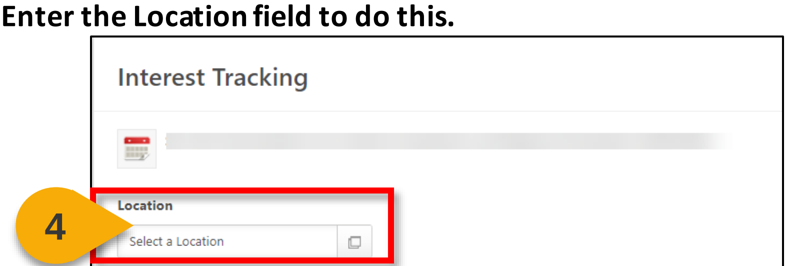
**Steps 1 & 2 : Using Global Search, search for the Event you'd like register for. Click on the Event Title.**




**Step 3: On the on the Event page, click either the Notify Me or Notify Me of New Sessions button.**

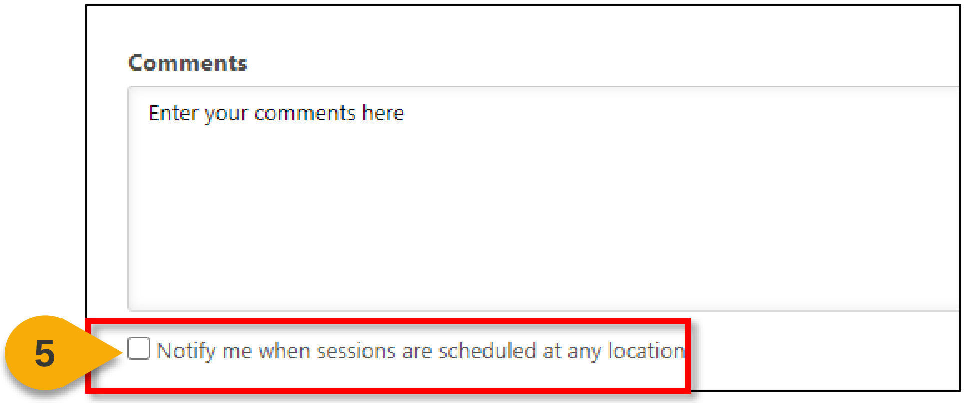




**Step 4: You have the option to select to be notified of Sessions held in a specific location. Enter the Location field to do this.**



# Indicate Interest in a Future Session (Cont. 1)

**Step 5: Enter any comments and to be notified for all sessions in any location, check the box next to "Notify me when sessions are schedule at any location".**

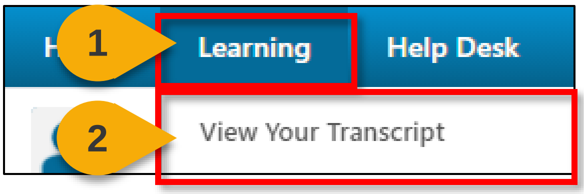



**Step 6: Once you have completed selecting the location preferences, click the Submit button at the bottom of the page.**

# Withdraw from an ILT

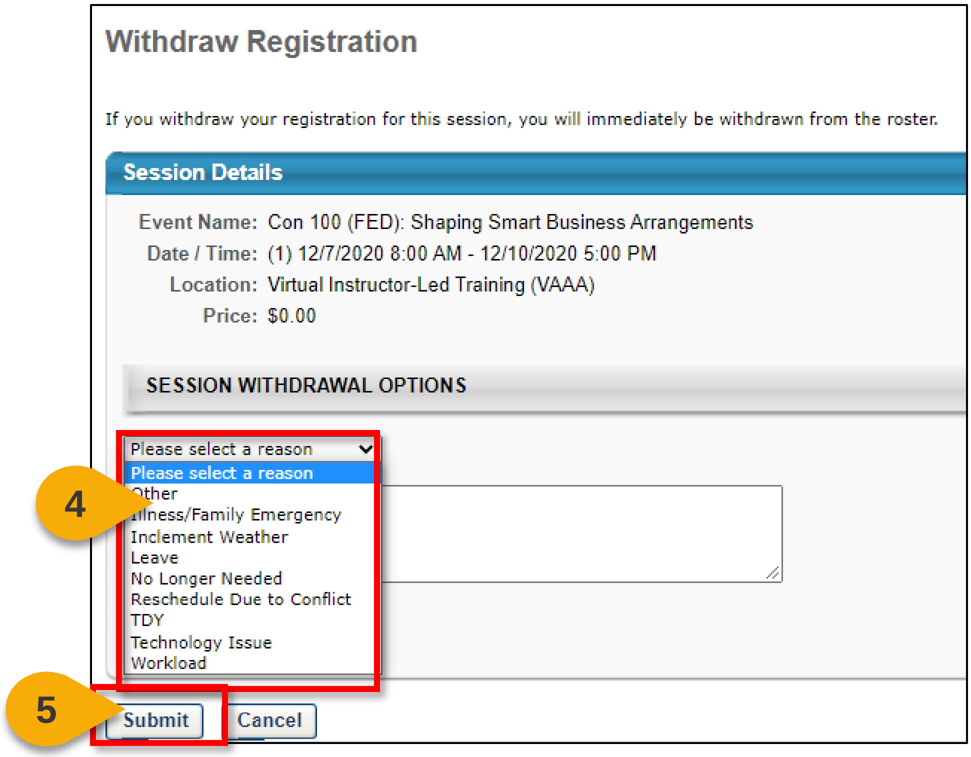
*When you need to withdraw from an ILT course…*

**Steps 1 & 2: Hover over the Learning tab and select View Your Transcript.**




**Step 3: Search and find the course you wish to withdraw. Select Withdraw.**


**Step 4 & 5: Select a reason for withdrawal and then click Submit.**

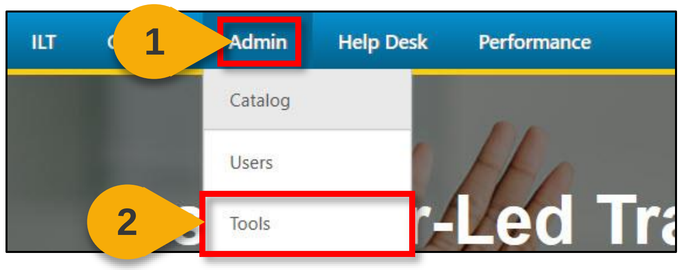


# Remove Training

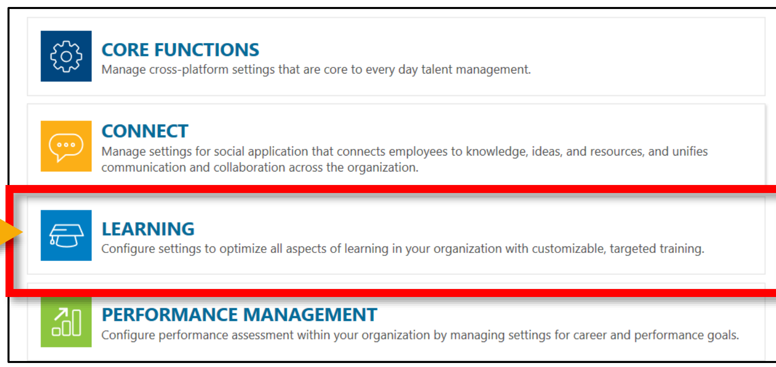
# Remove Training from Transcript Using Training Removal Tool

*When you want to remove the same training for multiple Users…*

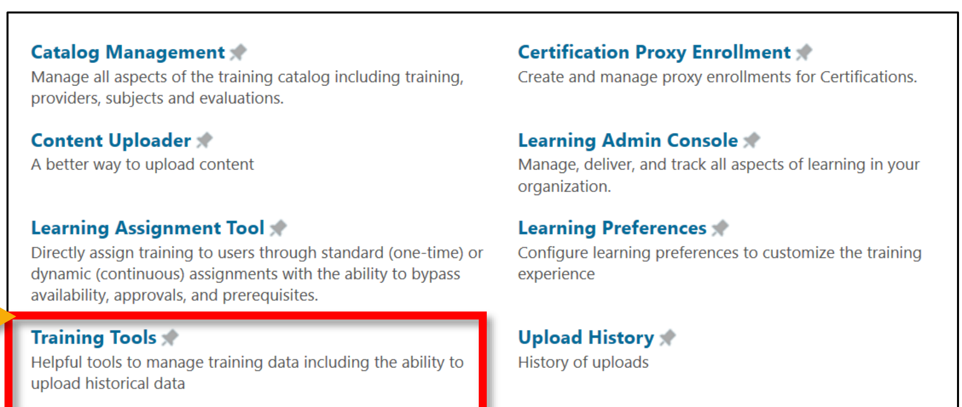
**Steps 1 & 2:** Hover over **Admin,** then select **Tools.**




**Step 3:** Click **Learning.**

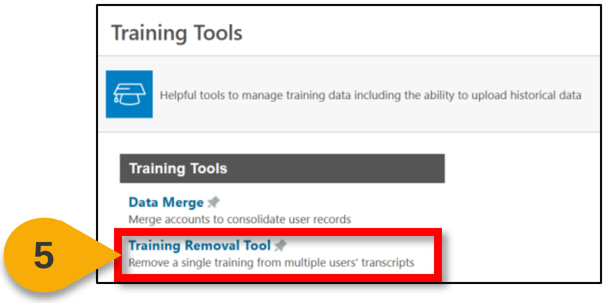



**Step 4:** Click **Training Tools.**

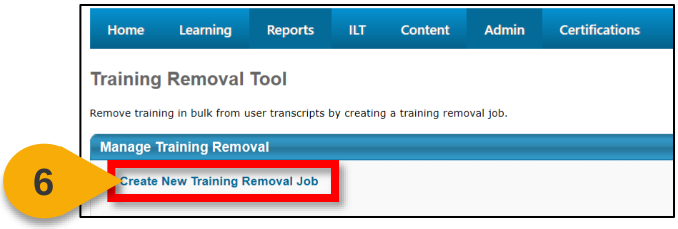


# Remove Training from Transcript Using Training Removal Tool (Cont.1)

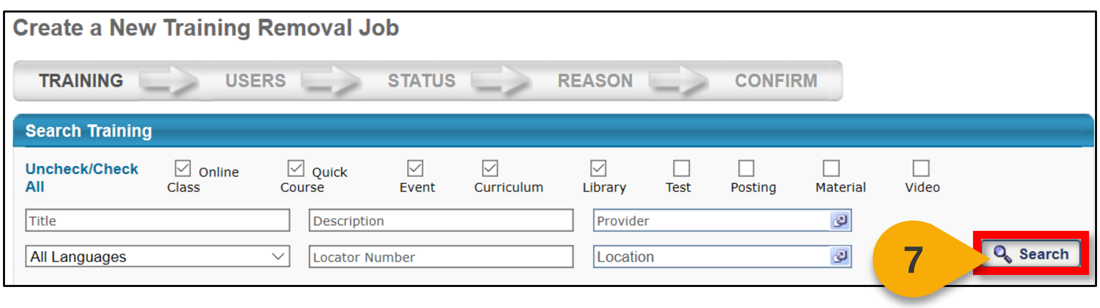
**Step 5:** Click **Training Removal Tool.**



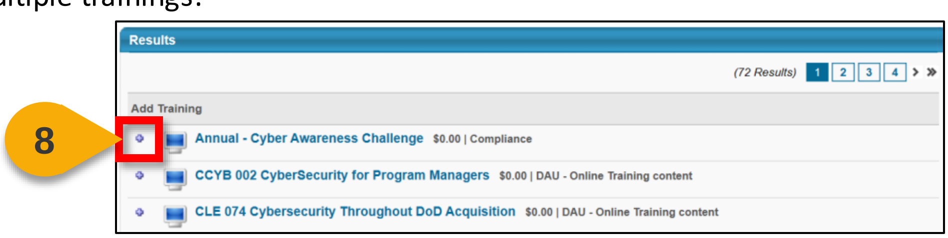

**Step 6:** Click **Create New Training Removal Job.**




**Step 7:** Enter the search criteria for the training you would like to remove and click **Search**.

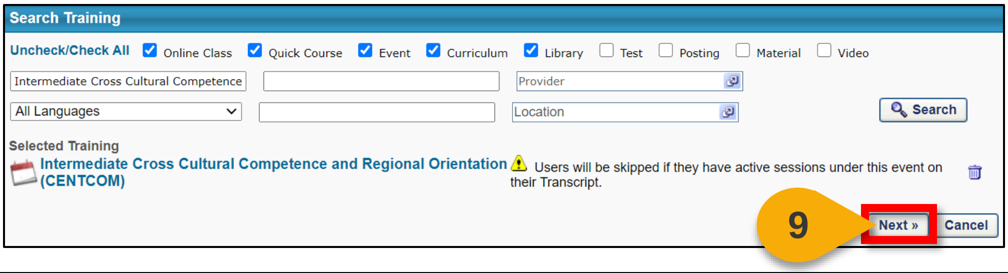



**Step 8:** In the search results click on the **blue plus sign** to add a training. You can select multiple trainings.

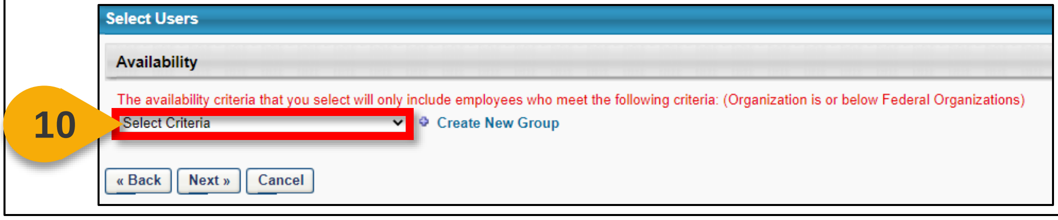


# Remove Training from Transcript Using Training Removal Tool (Cont.2)

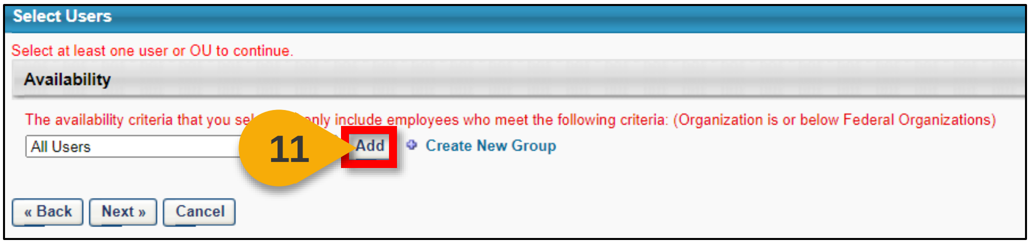
**Step 9:** Click **Next.**



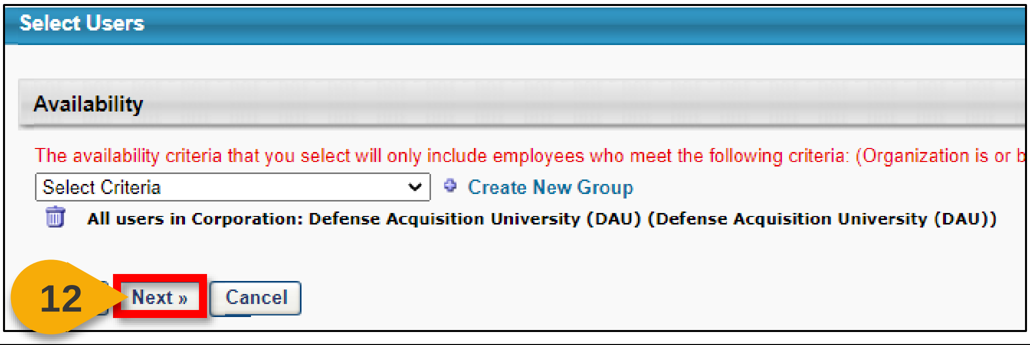

**Step 10:** Select the **availability criteria** to identify who will have the training removed from their Transcript.




**Step 11:** Click **Add** once you have identified your criteria.

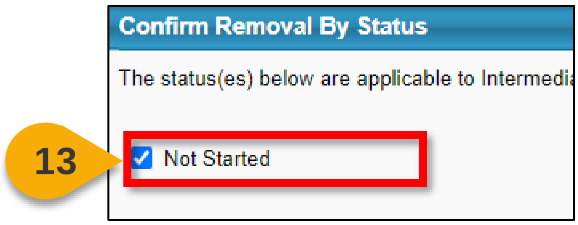



**Step 12:** Click **Next.**

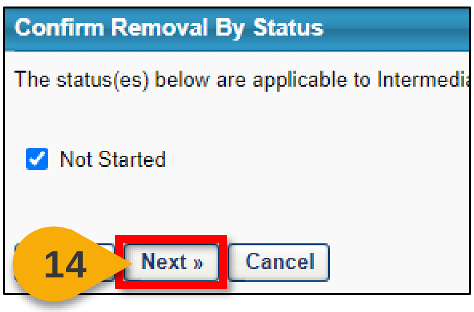


# Remove Training from Transcript Using Training Removal Tool (Cont.3)

**Step 13:** Select which **training statuses** the learning object (LO) can be in on a User's transcript for the training to be removed.

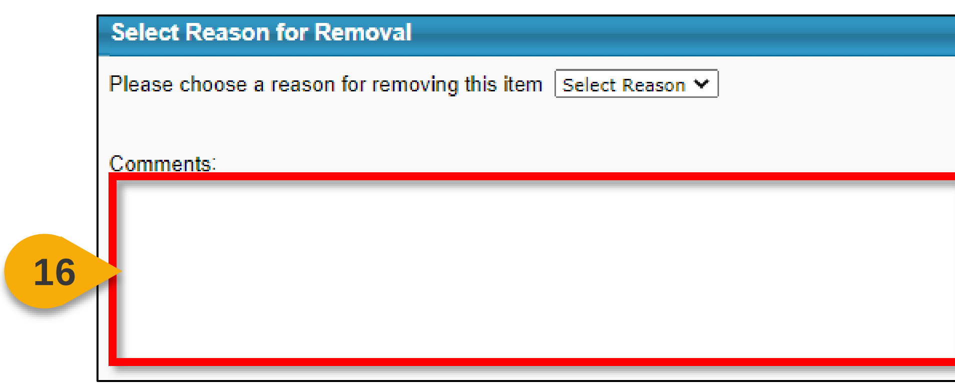



**Step 14:** After selecting the statuses, click **Next**.



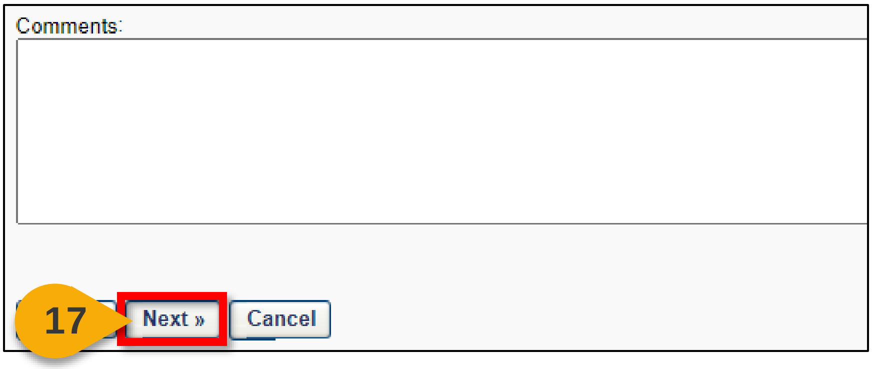

**Step 15:** Click the **Select Reason** drop-down to select the reason for removing the training.


**Step 16:** Enter a comment in the Comments field to further explain why the training is being removed.

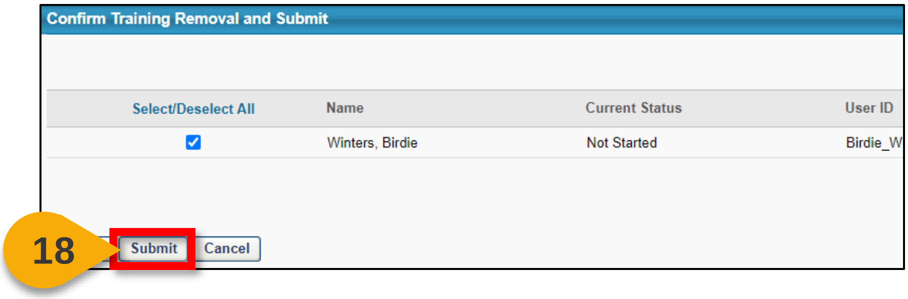


# Remove Training from Transcript Using Training Removal Tool (Cont.4)

**Step 17:** Click **Next.**



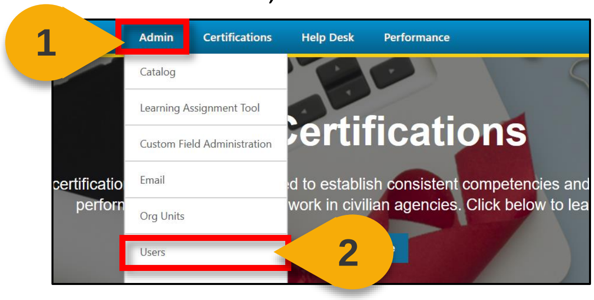

**Step 18:** Review all the details and click **Submit**. The training removal job will process.



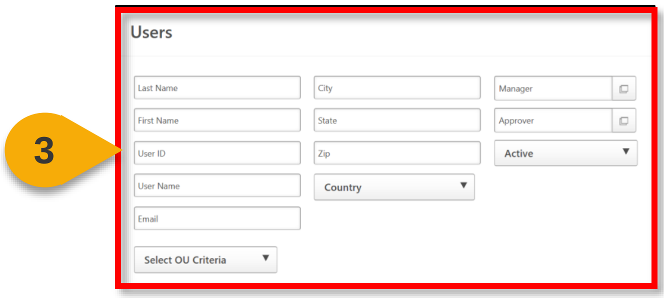
# Remove Training from Transcript

*When you want to remove an individual training from a User's transcript…*

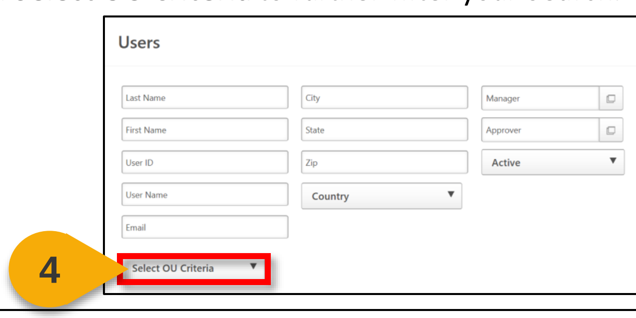
**Steps 1 & 2:** Hover over the **Admin** tab, then select **Users**.




**Step 3:** Enter your search criteria into the **search fields** to look for a User.



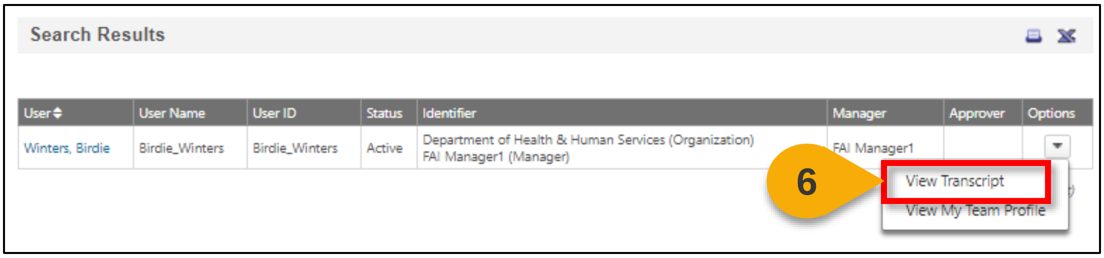

**Step 4:** Click on **Select OU Criteria** to further filter your search.



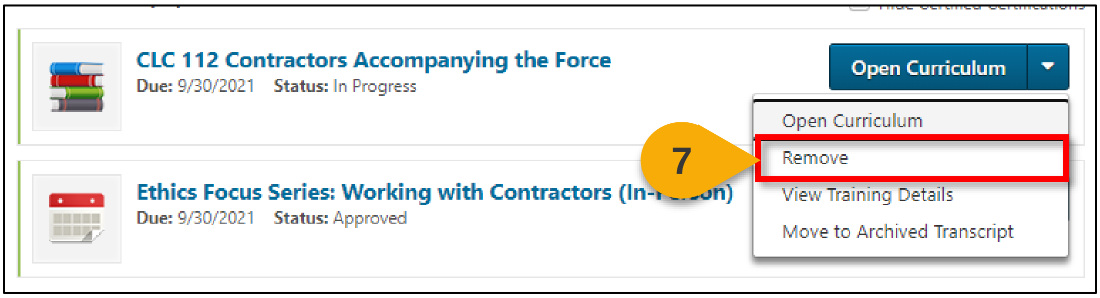

**Step 5:** Hit enter or click **Search**.

# Remove Training from Transcript (Cont.1)

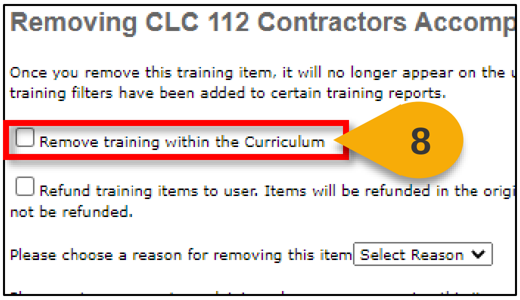
**Step 6:** Choose the User who you'd like to remove and select **View Transcript** from the drop-down menu under the Options column.



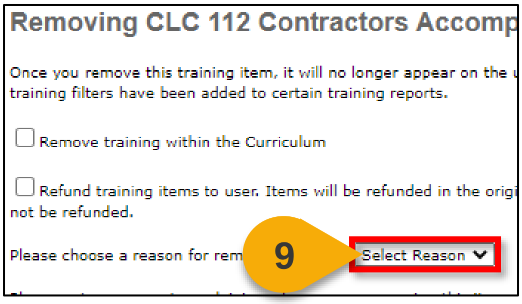

**Step 7:** Find the training you'd like to remove. From the Action drop-down menu on the left, click **Remove**.




**Step 8:** Check **Remove training within the Curriculum** to remove this training when it appears within a Curriculum on the Transcript.

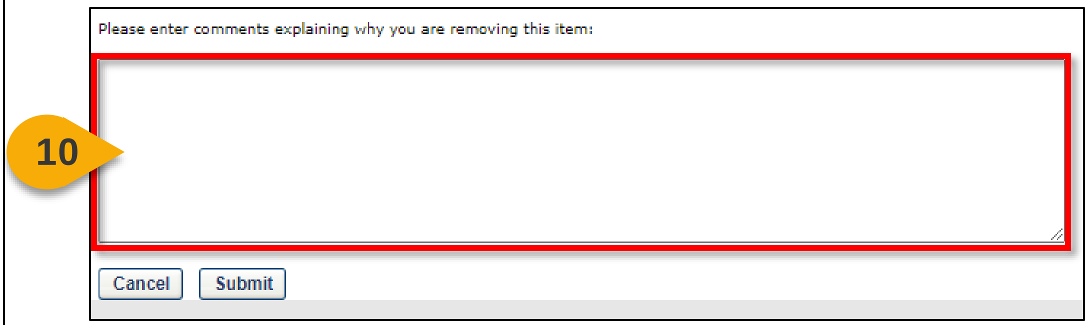



**Step 9:** Select a reason from the **Select Reason** drop-down for removing the course.

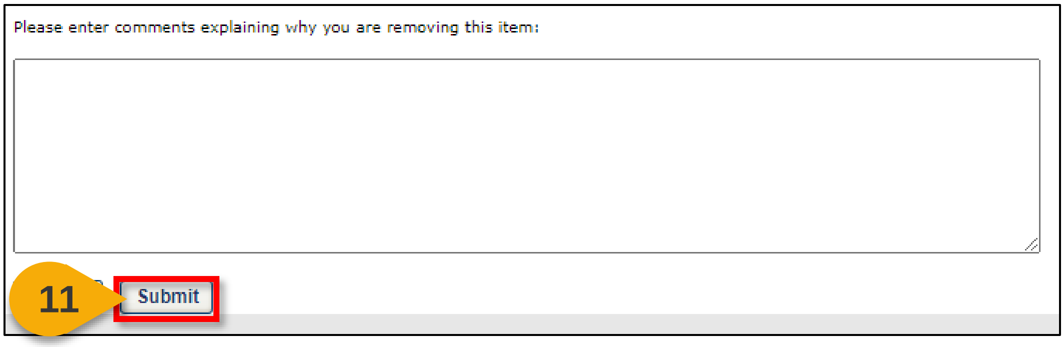


# Remove Training from Transcript (Cont.2)

**Step 10:** Enter a **comment** explaining why the training was removed.




**Step 11:** Click **Submit**. The course will be deleted from the User's Transcript and you will be returned to their Transcript.

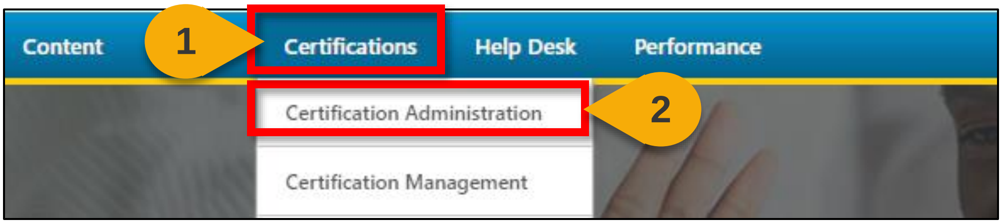


# Certification Management

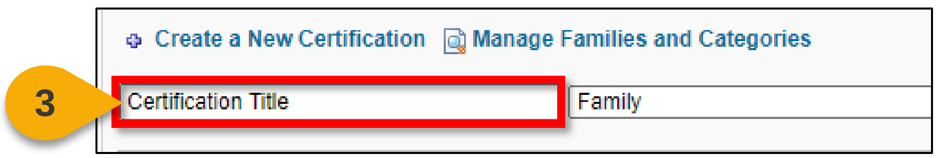
# View Certification Information

*When you want to view information about a Certification…*

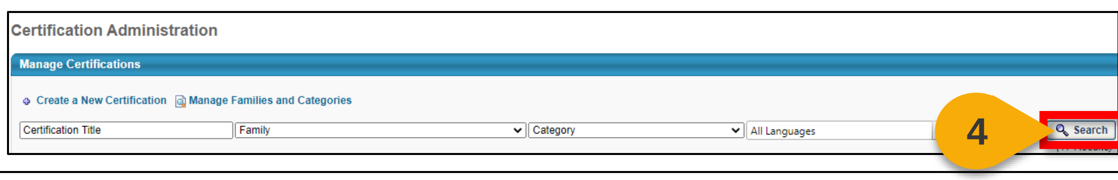
**Steps 1 & 2:** Hover over the **Certifications** tab, then click **Certification Administration**.



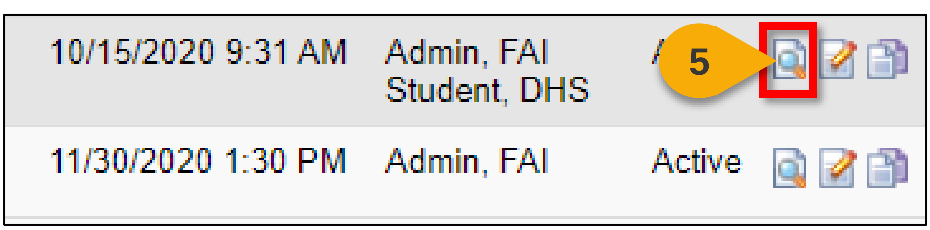

**Step 3:** Type in the name of the Certification in the **Certification Title** field. Alternatively, you can use the other search criteria available on this page.




**Step 4:** Click **Search**.



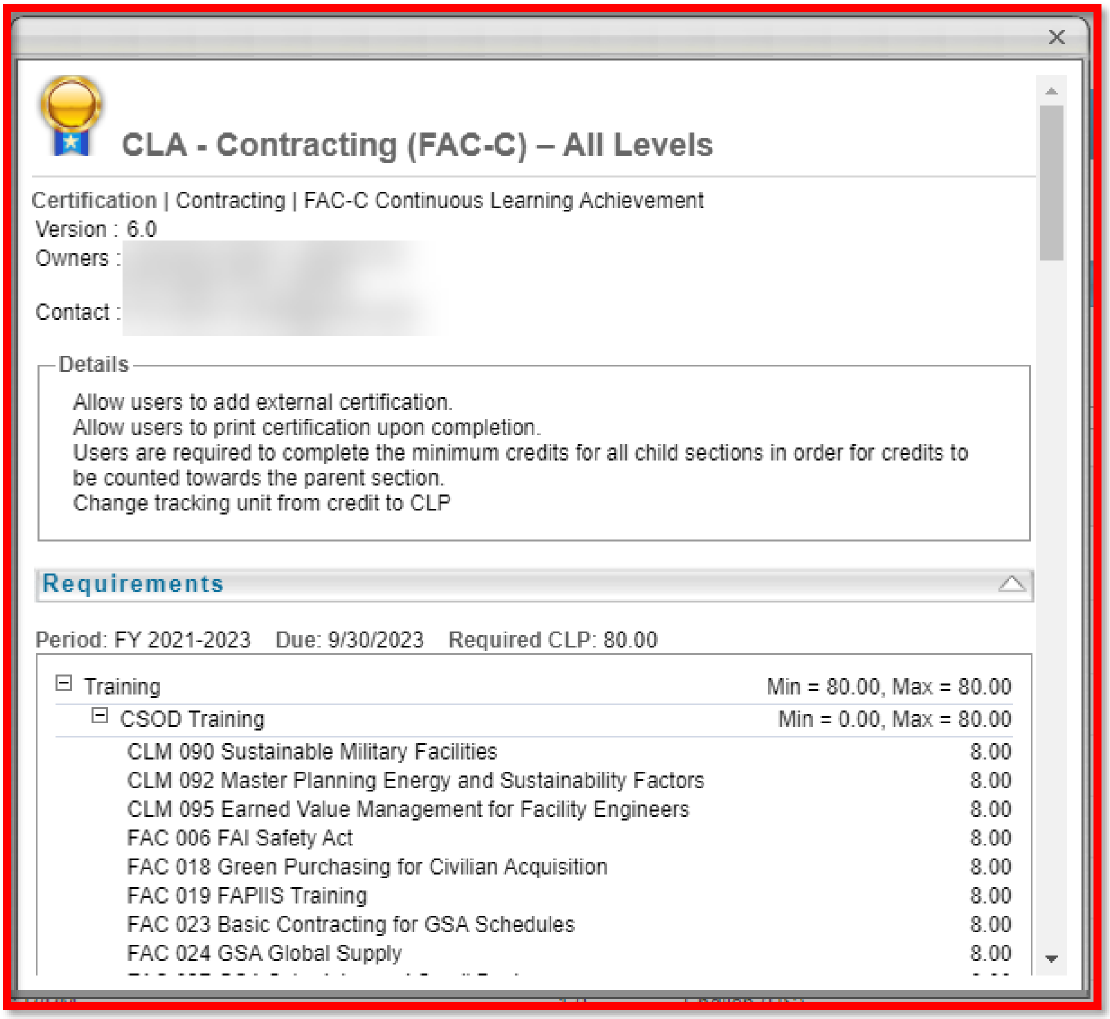

**Step 5:** Click on the **Magnifying Glass** icon to view information on the Certification of your choice.



# View Certification Information (Cont.1)

*When you want to view information about a Certification…*

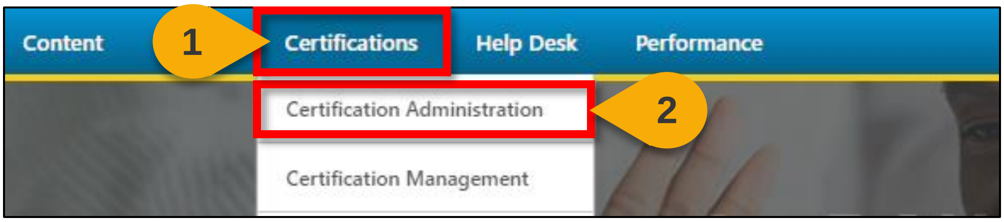
**Step 6:** You will now see basic details about the Certification, along with Certification Requirements.



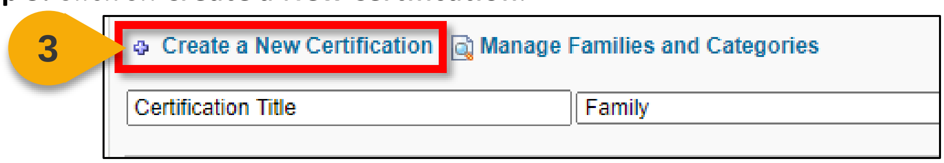
# Create Certifications

*When you want to create a Certification…*

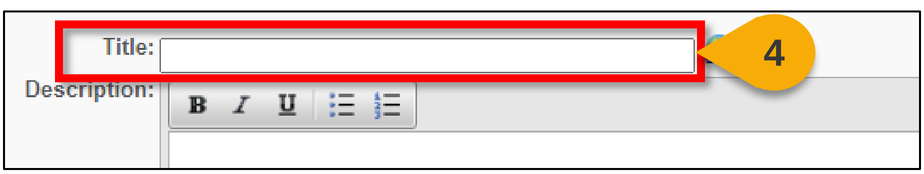
**Steps 1 & 2:** Hover over the **Certifications** tab and click **Certification Administration**.



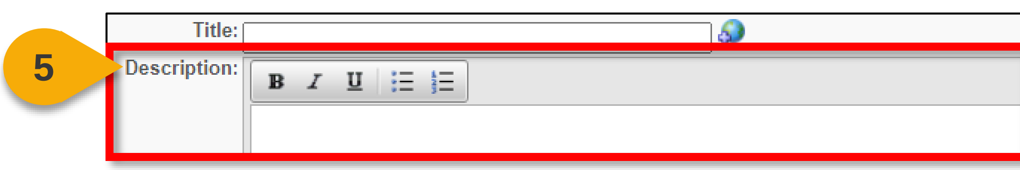

**Step 3:** Click on **Create a New Certification**.



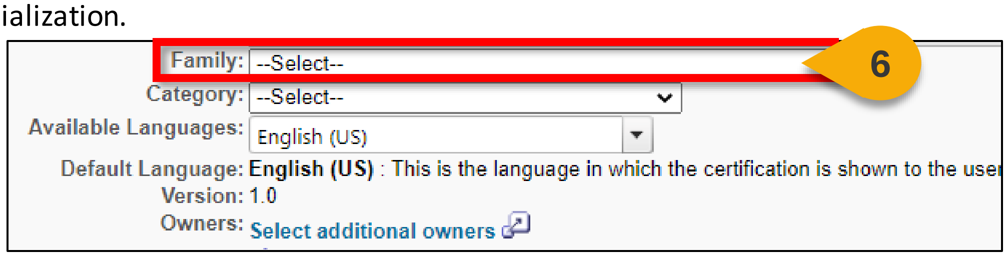

**Step 4**: Enter the title name in the **Title** field.




**Step 5:** Enter a description in the **Description** field.

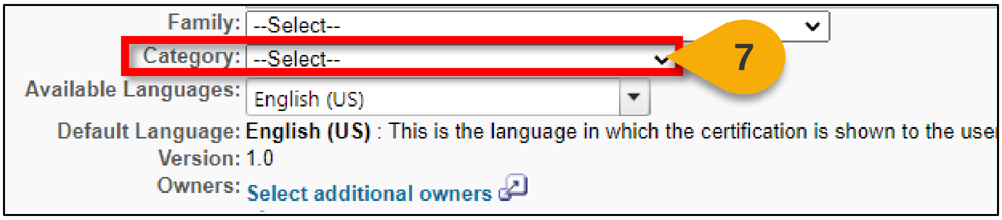



**Step 6:** Click the **Family** drop-down to select a Family for the Certification. The Certification Family is the Certification topic/subject, such as Contracting or Specialization.

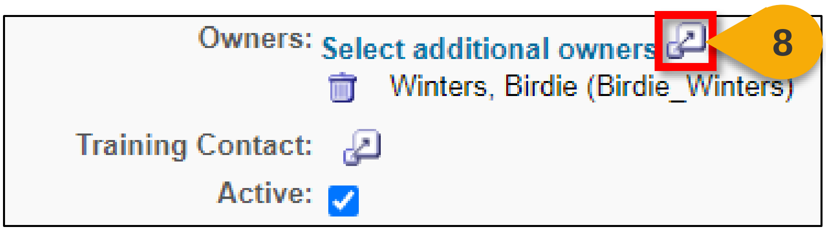


# Create Certifications (Cont.1)

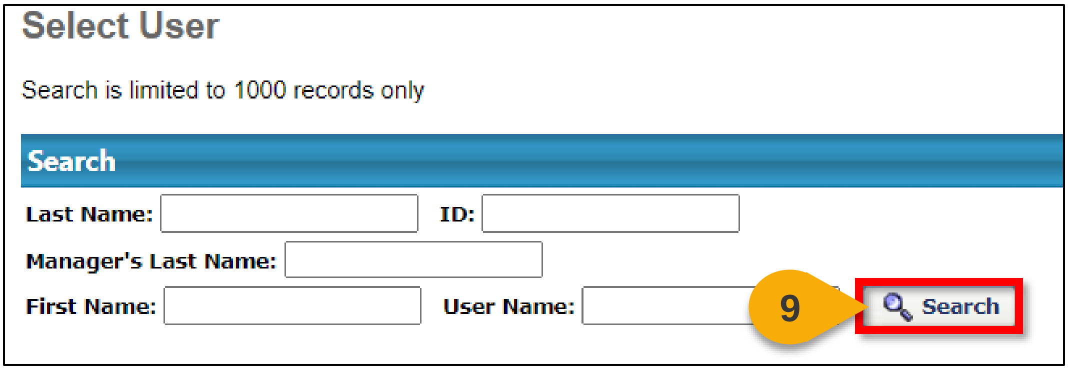
**Step 7:** Click the **Category** drop-down to select a Category for the Certification. The Certification Category is the Certification group this specific Certification is a part of, for example, FAC-C or FAC P/PM.




**Step 8:** The User who creates the Certification is always listed as the owner. The Certification Owner is the only individual who will have the power to Revoke/Put on Hold this Certification. You can have multiple Certification Owners. If you wish to add an additional owner, click the **blue popout** icon.

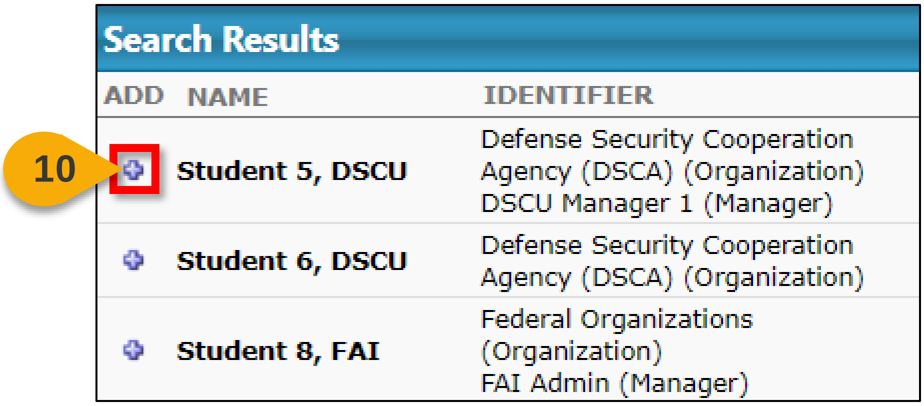



**Step 9:** A new window will appear. Enter the Certification Owner's name into the Last Name and First Name field or the DAU ID into the ID field. Click **Search.**

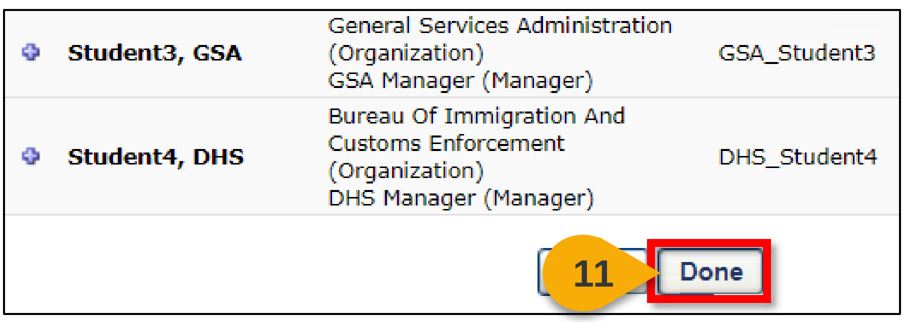


# Create Certifications (Cont.2)

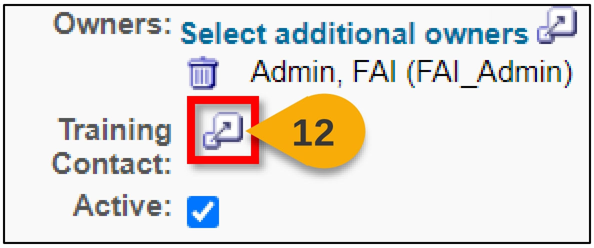
**Step 10:** Click the **blue plus sign** to add a User as a Certification owner.




**Step 11:** Click **Done** to close the window and confirm the User.

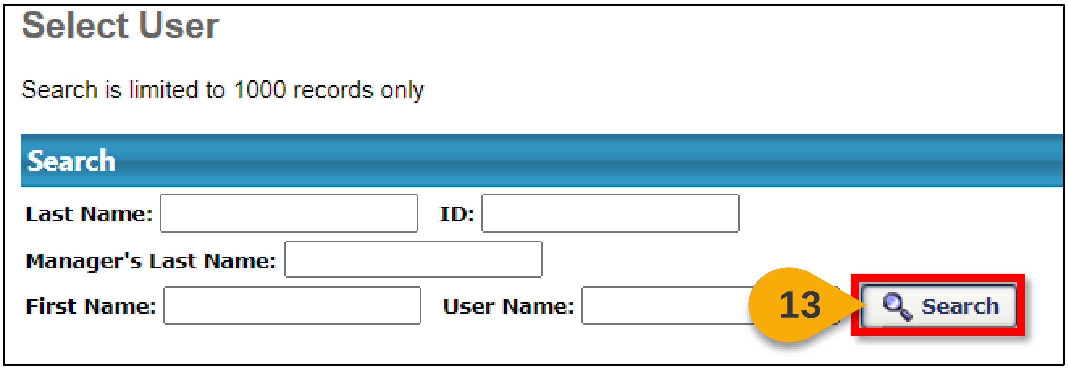



**Step 12:** Click the **popout** icon to add a Training Contact. Training Contacts are listed as the main contact for the Certification. When viewing a Certification, the Training Contact is visible to end Users.

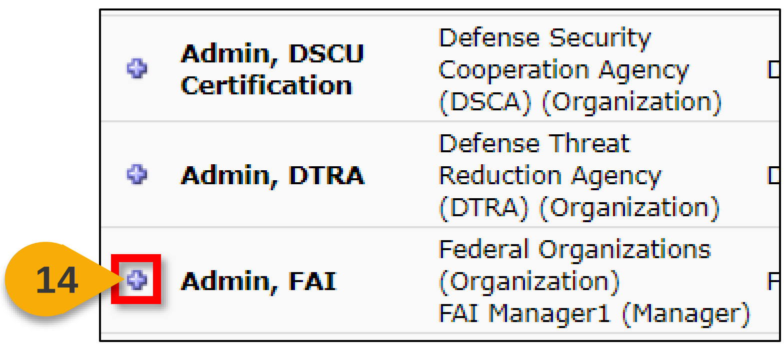


# Create Certifications (Cont.3)

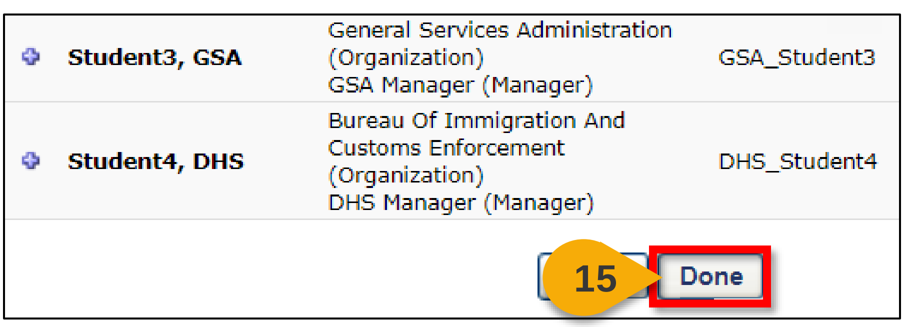
**Step 13:** A new window will appear. Enter the Certification Owner's name into the Last Name and First Name field or the DAU ID into the ID field. Click **Search.**




**Step 14:** Click the **blue plus sign** to add a User as a Training Contact.



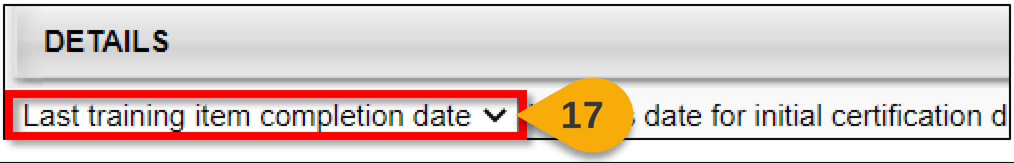

**Step 15:** Click **Done** to close the popup window and confirm the Training Contact.



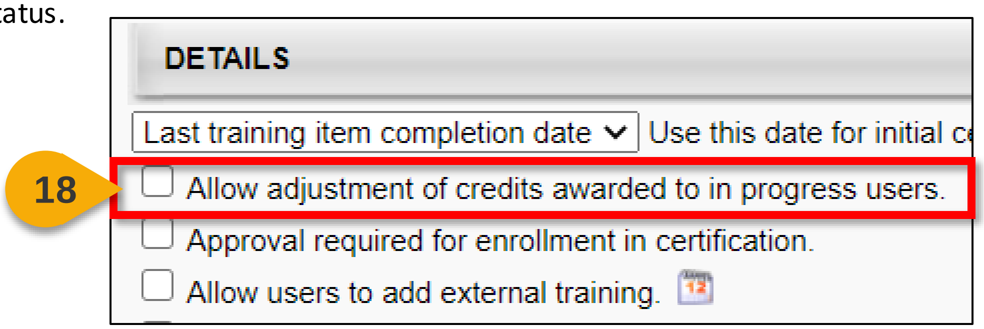
# Create Certifications (Cont.4)

**Step 16:** Leave the checkbox in the **Active** field checked to create the Certification as Active in CSOD.

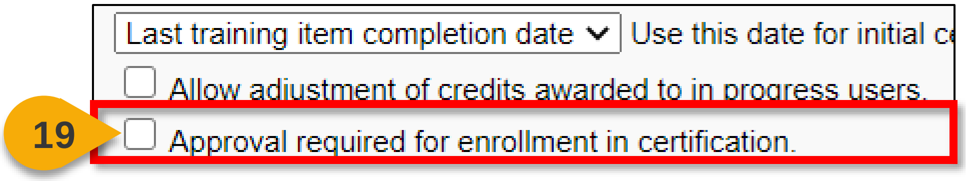

**Step 17:** Click the **first drop-down in the Details section** to select the Initial Certification date. You can choose to have this date be the day the last training item was completed (recommended) or the day the User registered for the Certification.




**Step 18:** Check the box for **Allow adjustment of credits awarded to in progress users** if you want the ability to update the credits awarded to Users with an In Progress status.

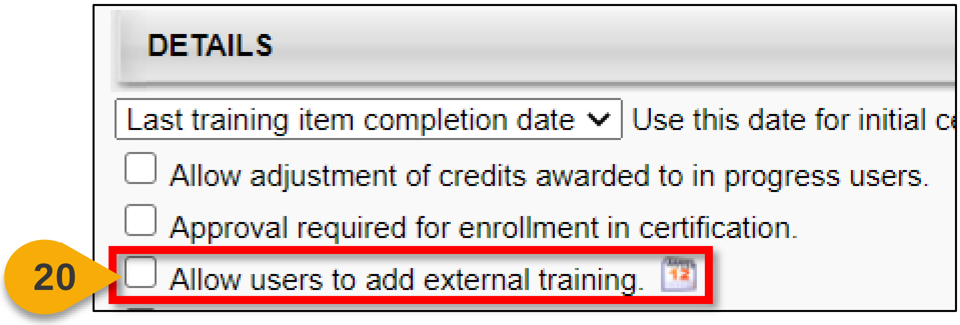



**Step 19:** Check the box for **Approval required for enrollment in Certification** if you want to require Users go through an approval workflow prior to being able to register for the Certification. We recommend you do not check this.

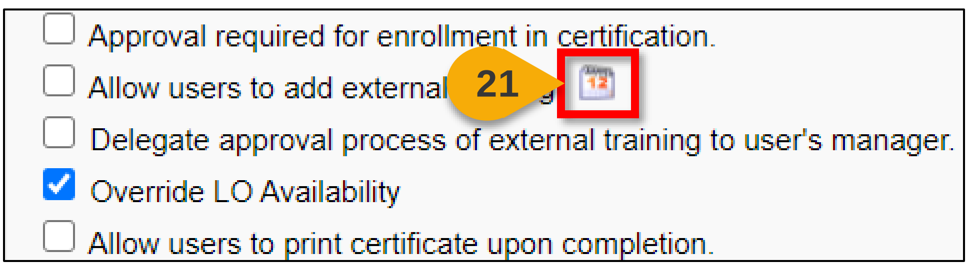


# Create Certifications (Cont.5)

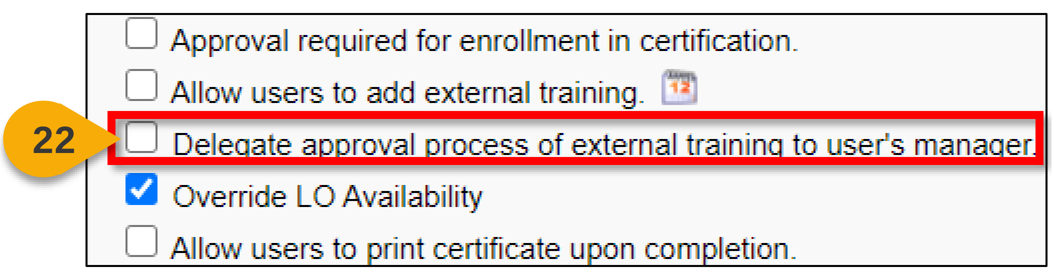
**Step 20:** Check the box for **Allow Users to add external training** if you want Users to have the option to receive CLPs for external training. This option is only recommended for CLA Certifications.




**Step 21:** If you select to allow Users to add external training, click the **Calendar** icon to set the parameters for submitting credit.

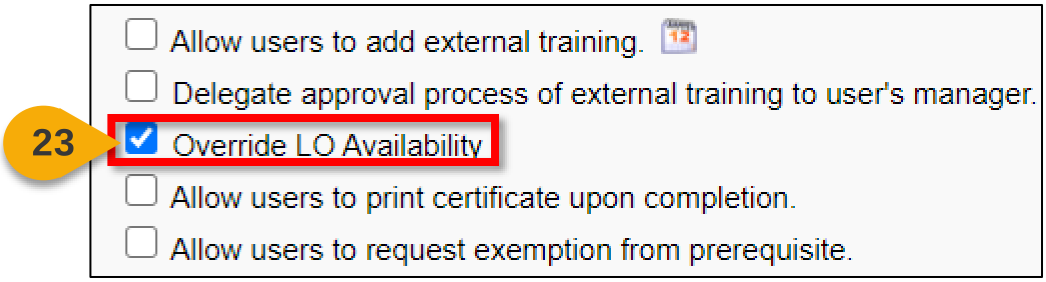



**Step 22:** Check the box for **Delegate approval process of external training to user's manager** if you want to allow for the manager to approve registration for the Certification.

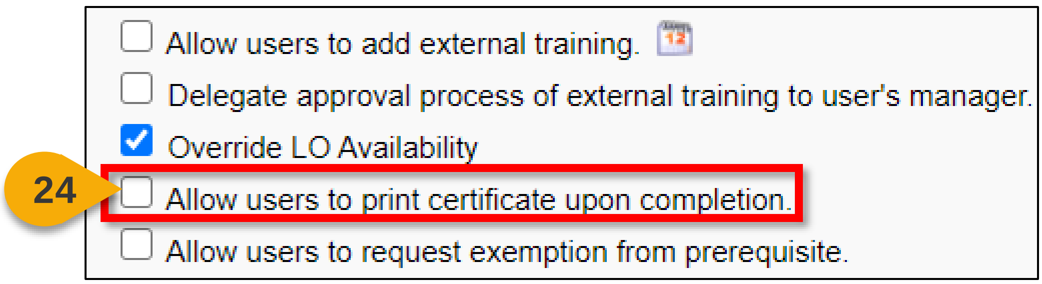


# Create Certifications (Cont.6)

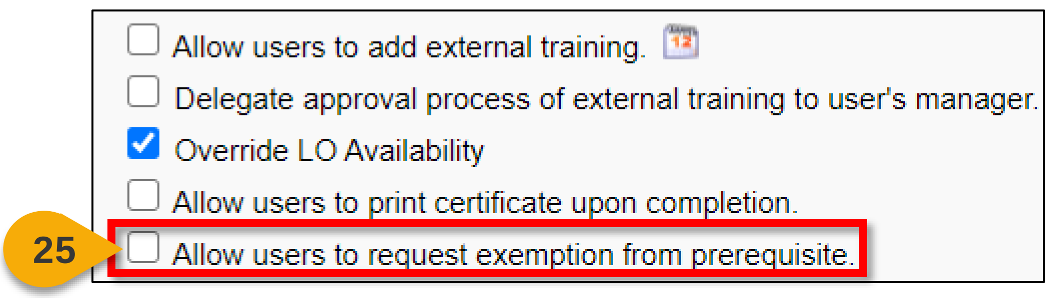
**Step 23:** Check the box for **Override LO Availability** to override the set availability for Learning Objects.




**Step 24:** Check the box **Allow users to print certificate upon completion** if you want to allow Users to print their certificate.

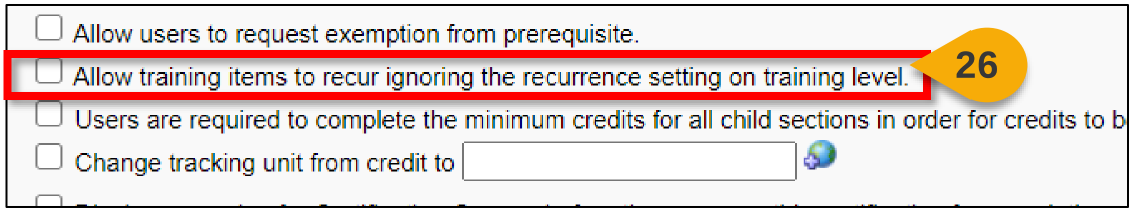



**Step 25:** Check the box for **Allow users to request exemption from prerequisite** if you want Users to be able to submit an exemption request for prerequisites.

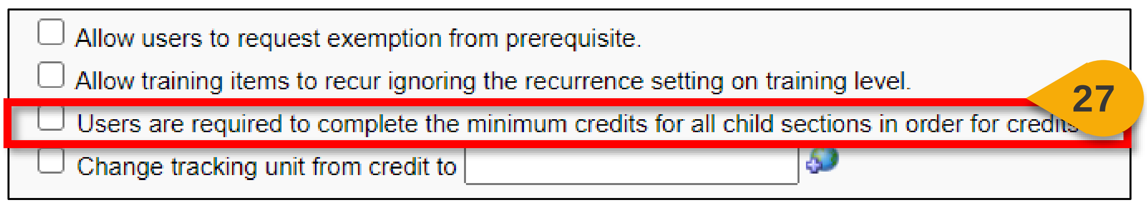


# Create Certifications (Cont.7)

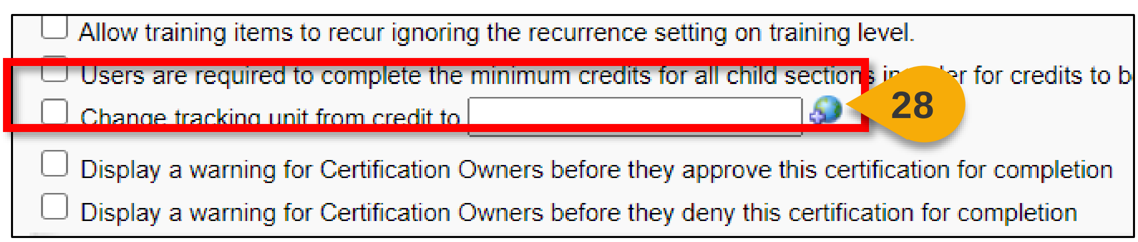
**Step 26:** Check the box to **Allow training items to recur ignoring the recurrence setting on training level** if you want training items to recur more often than indicated at the training level.



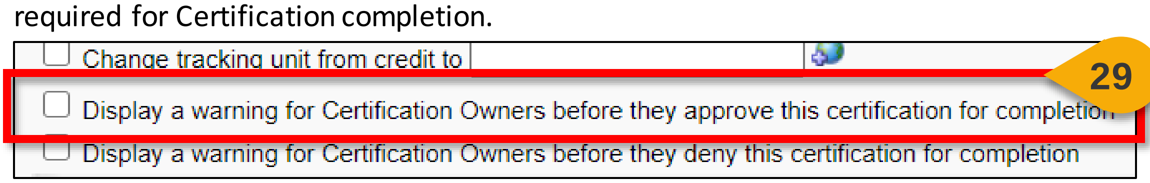

**Step 27:** Check the box for **Users are required to complete the minimum credits for all child sections in order for credits to be counted towards the parent section** if you want Users to satisfy the minimum credit requirements for each section in order for those credits to be counted towards completion of the Certification.




**Step 28:** Check the box to **Change tracking unit from credits to ____** if you want to change how the credits are counted. For Initial Certifications, check this box and enter “Completion” into the field. For CLA Certifications check this box and enter “CLP” into the field.

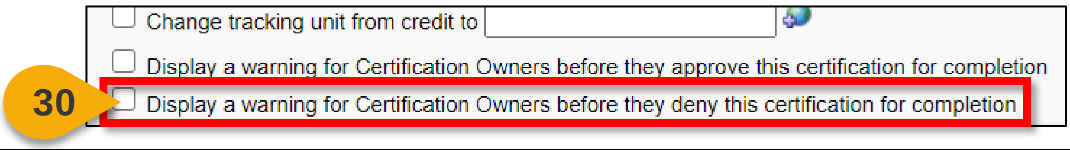



**Step 29:** Check the box to **Display a warning for Certification Owners before they approve this Certification for completion** only if you have indicated that approval is required for Certification completion.

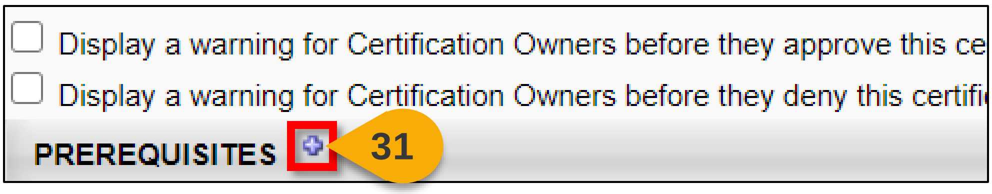


# Create Certifications (Cont.8)

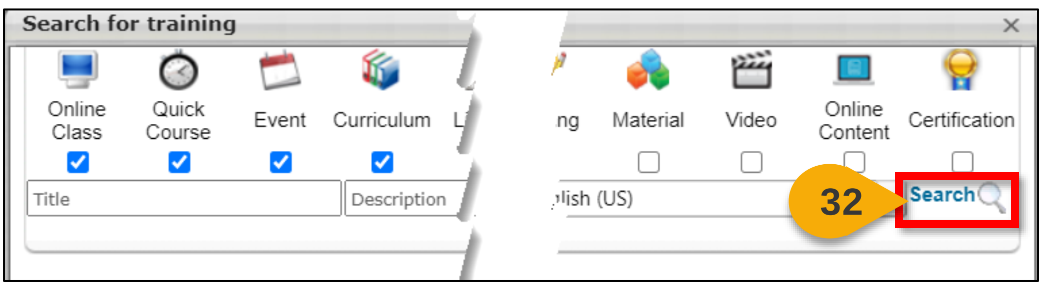
**Step 30:** Check the box **Display a warning for Certification Owners before they deny this Certification for completion** only if you have indicated that approval is required for Certification completion.



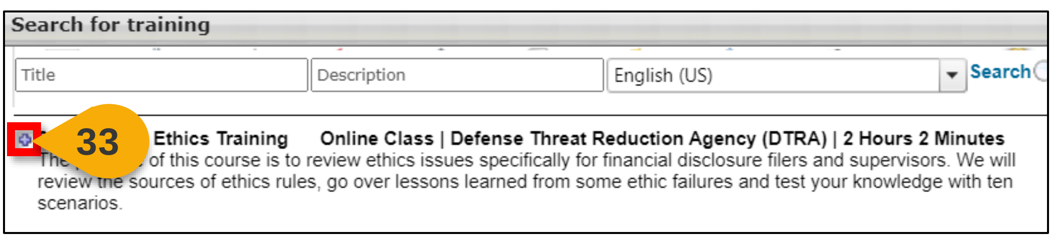

**Step 31:** In the Prerequisites section, click the **blue plus sign** to add any Prerequisites, if applicable. A new window will open.




**Step 32:** Enter a prerequisite course title and click **Search.**

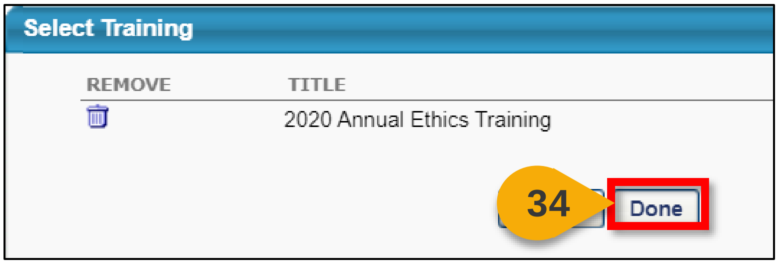



**Step 33:** Click the **blue plus sign** to add a course as a prerequisite.

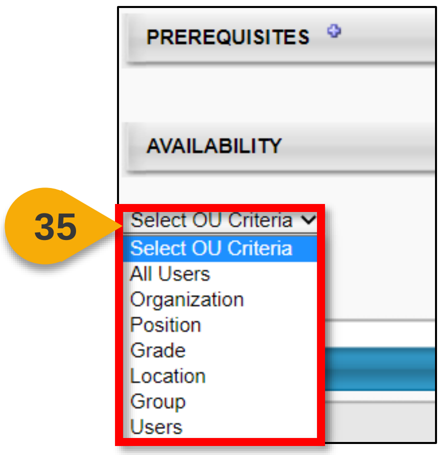


# Create Certifications (Cont.9)

**Step 34:** Click **Done** to close the window and add the course as a Prerequisite.



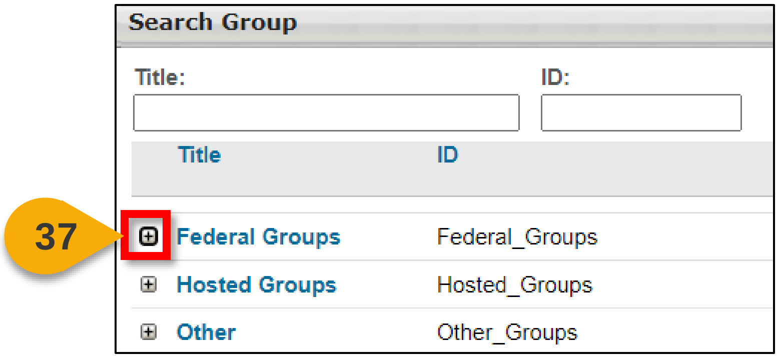

**Step 35:** In the Availability section, click the **Select OU Criteria** drop-down to select the Availability for the Certification.



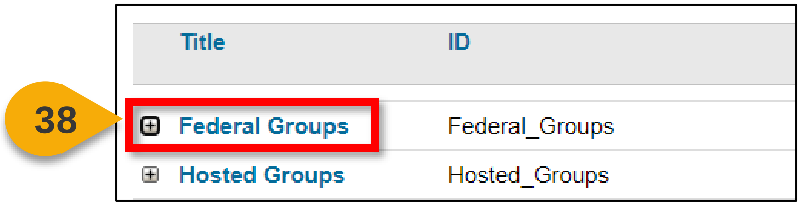

**Step 36:** Click the **blue popout** icon to select the appropriate Groups, Users, Organizations, etc.

# Create Certifications (Cont.10)

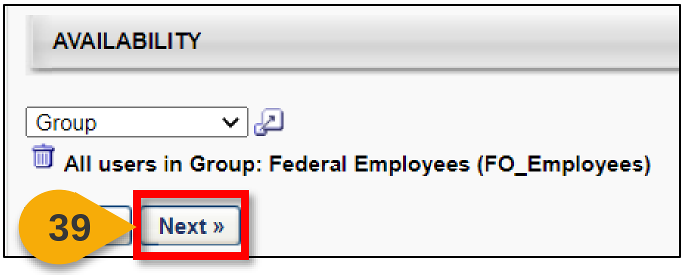
**Step 37:** In the new window that opens, **search for** or **drill down to** the Organizational Unit (OU) desired.



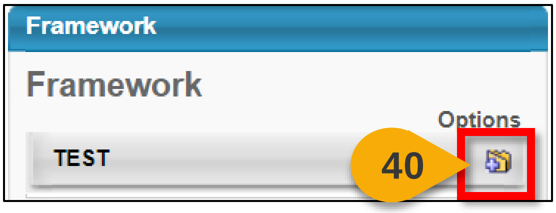

**Step 38:** Click on the **name** of the Group, OU, or User to add them to the Availability.




**Step 39:** Click **Next** to advance to the Framework tab**.**

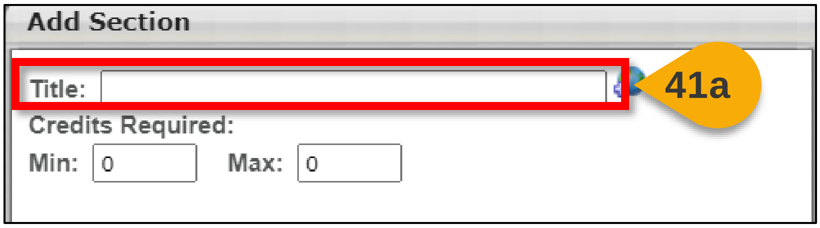



**Step 40:** Click the **folder and blue plus sign** in the Options column to add a section to the framework.

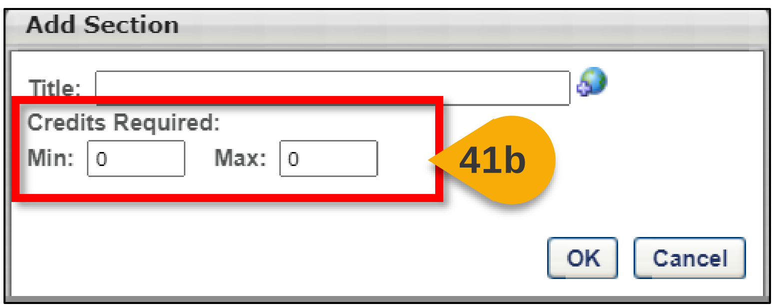


# Create Certifications (Cont.11)

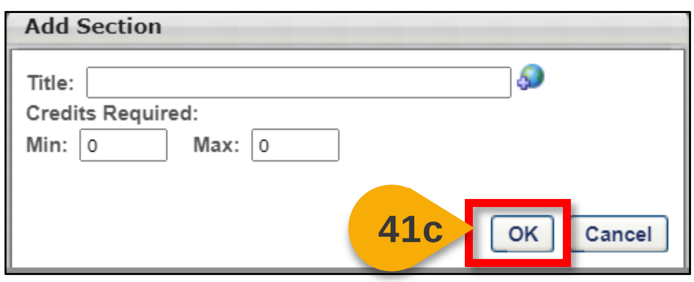
**Step 41a:** A Add Section window will open. Enter the section title in the **Title** field.



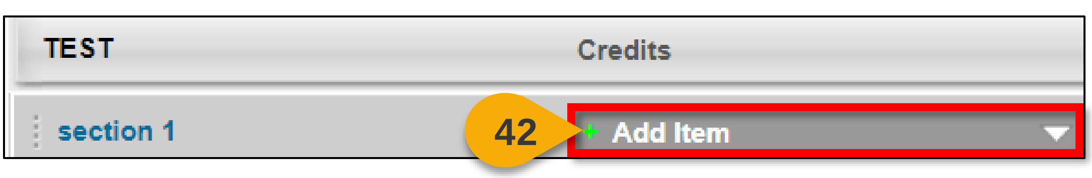

**Step 41b:** Enter the Credits needed for satisfaction of section requirements in the **Credits Required** fields.




**Step 41c:** Click **OK** to save the section and close the popup window.

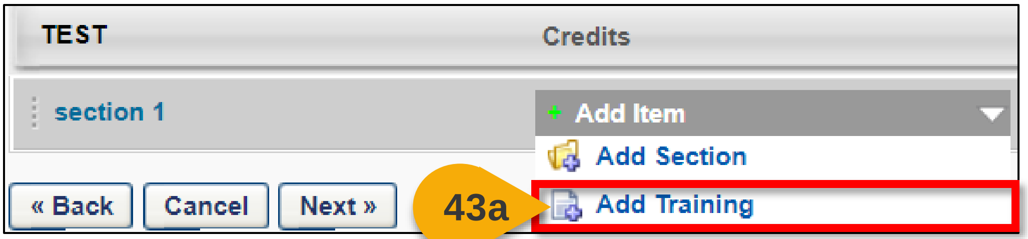



**Step 42:** In the Credits column, over over the **Add Item** to show a drop-down of other items you can add to the section.

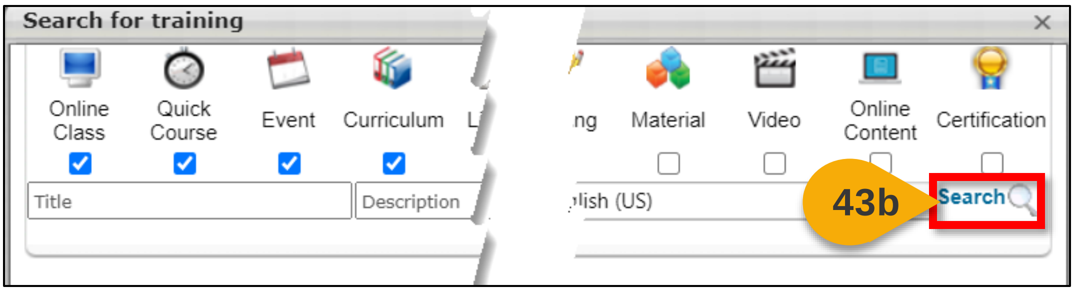


# Create Certifications (Cont.12)

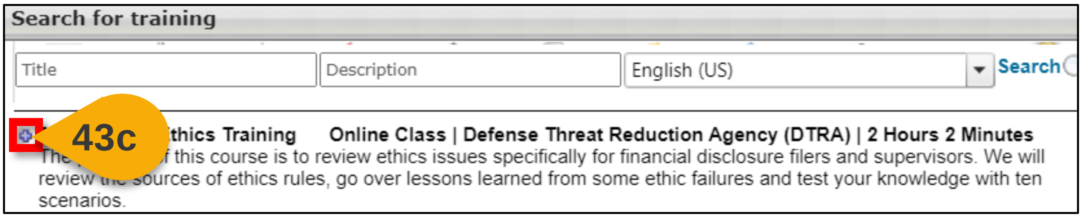
**Step 43a:** Click **Add Training** to add a Learning Object to the section.



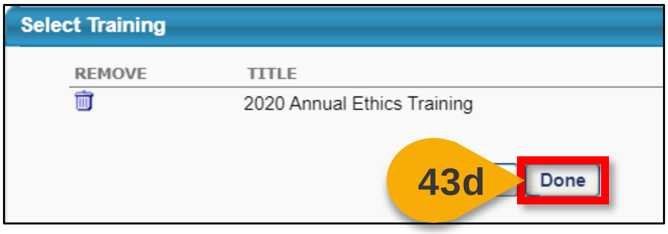

**Step 43b:** A new window will open. Enter a title and/or click **Search.**




**Step 43c:** Click the **blue plus sign** to add a course to the Framework.

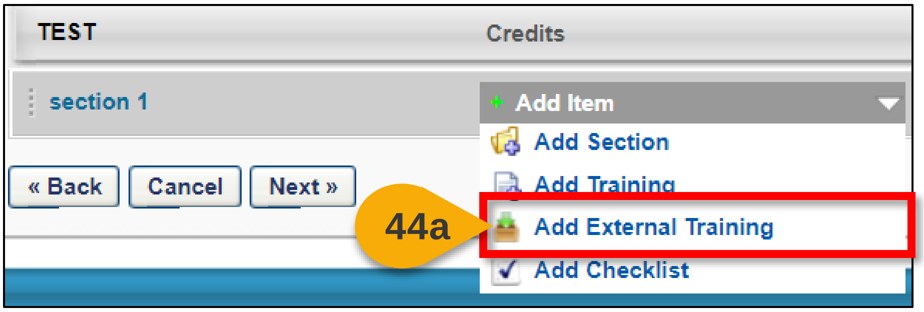



**Step 43d:** Click **Done** to close the popup window.

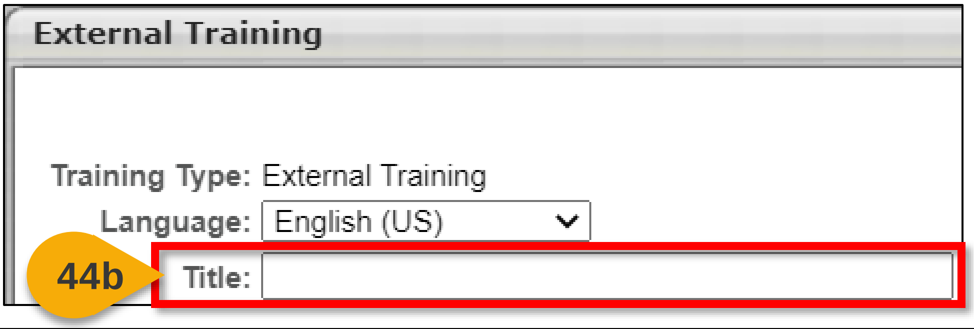


# Create Certifications (Cont.13)

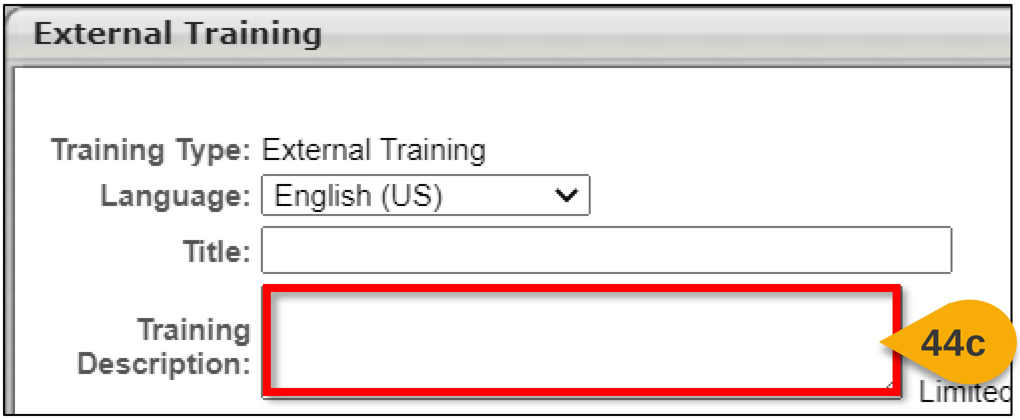
**Step 44a:** Click **Add External Training** to add External Training to the section.




**Step 44b:** Enter the title in the **Title** field.

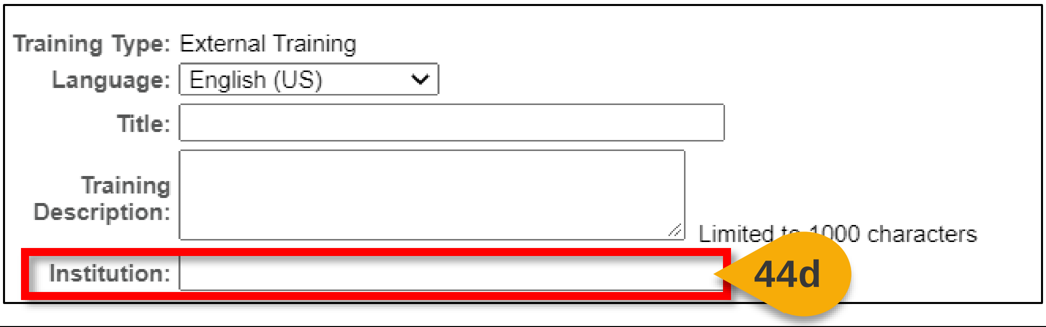



**Step 44c:** Enter a description of the training in the **Training Description** field.

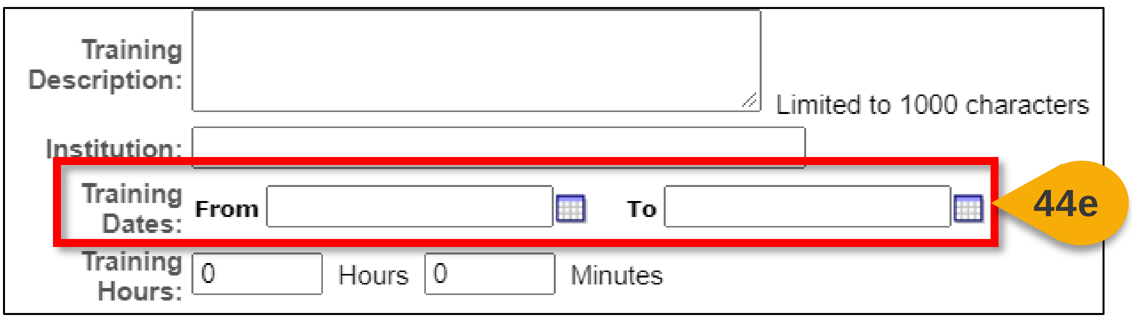


# Create Certifications (Cont.14)

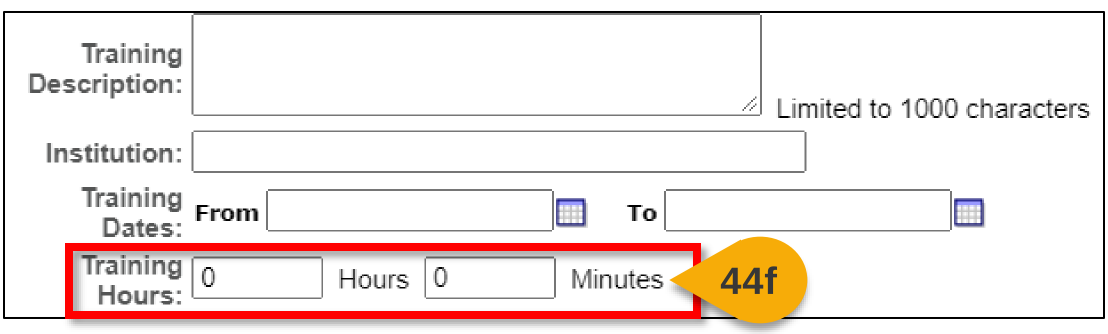
**Step 44d:** Enter the institution in the **Institution** field.




**Step 44e:** Click on the **Calendar** icons to enter the dates for the training in the Training Dates field.

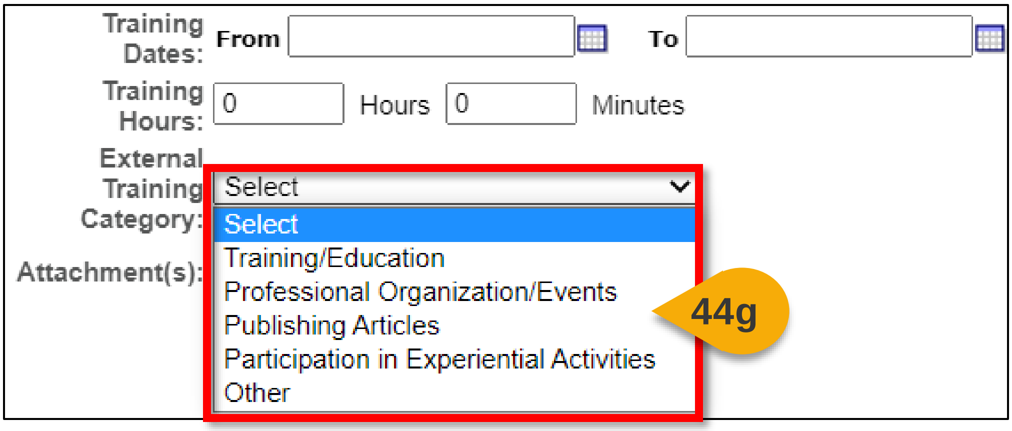



**Step 44f:** Enter the training hours for this course in the **Training Hours** field.

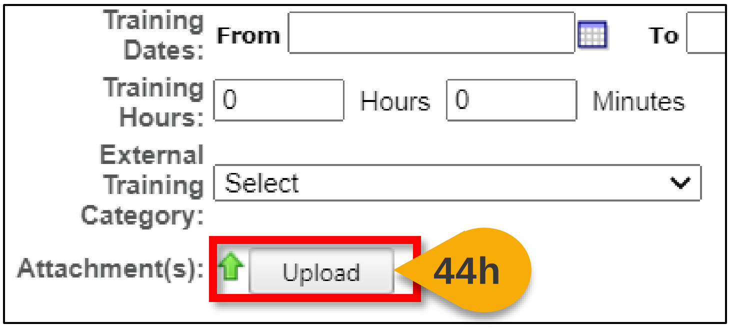


# Create Certifications (Cont.15)

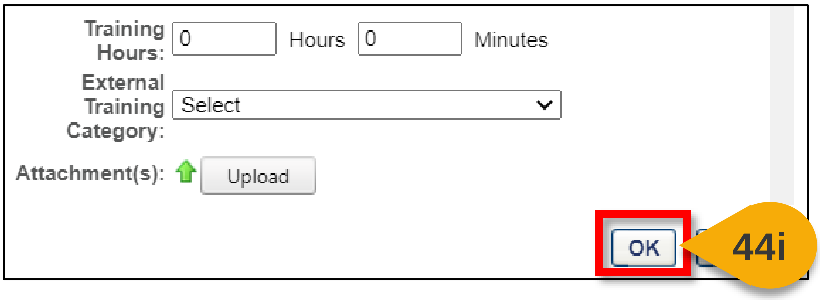
**Step 44g:** Click on the **External Training Category** drop-down to select the type of training.




**Step 44h:** Click the **Upload** button to add any attachments.

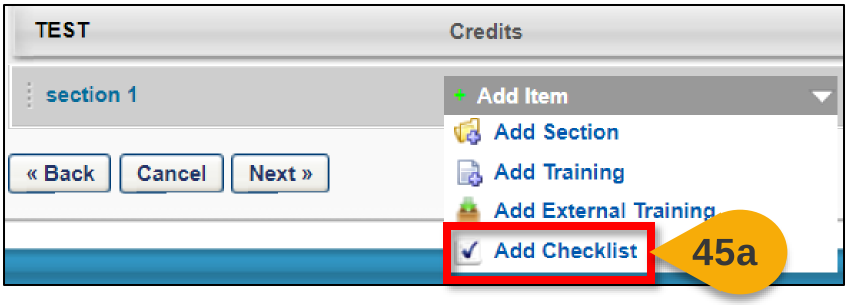



**Step 44i:** Click **OK** to save your changes and the External Training.

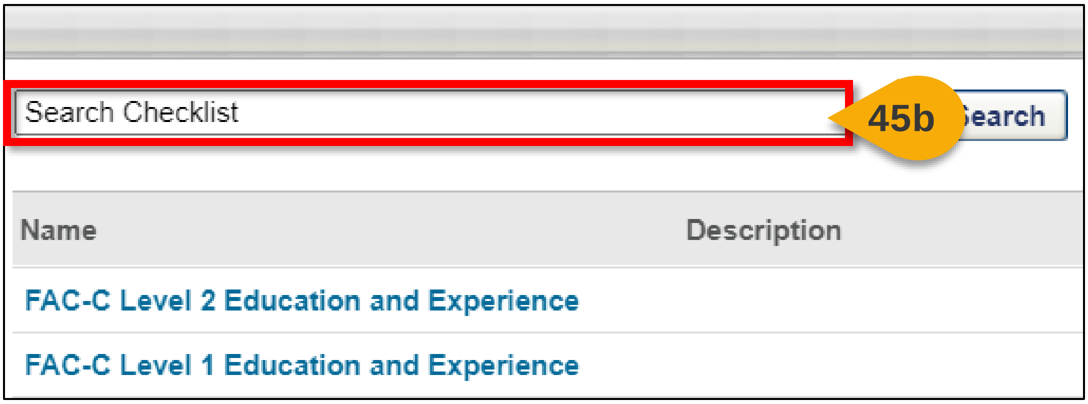


# Create Certifications (Cont.16)

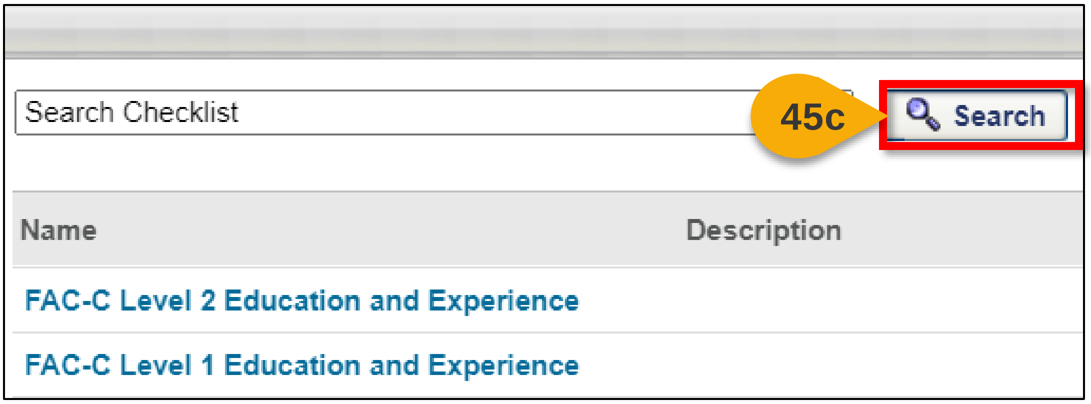
**Step 45a:** Click **Add Checklist** to add a Checklist to the section.




**Step 45b:** Type the name of the Checklist in the **Search Checklist** field.

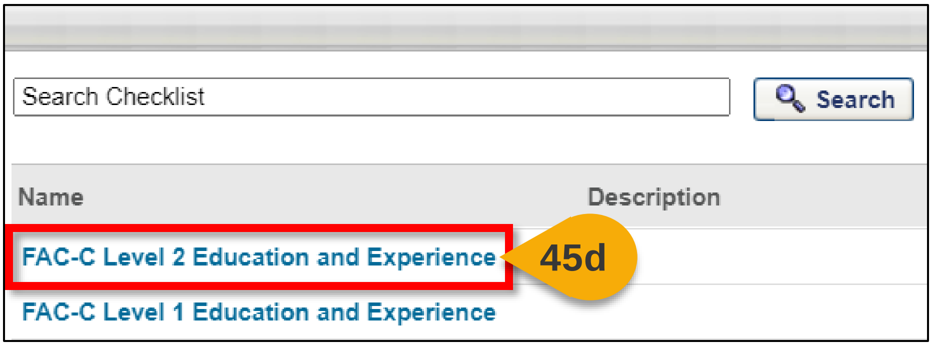



**Step 45c:** Click **Search**.

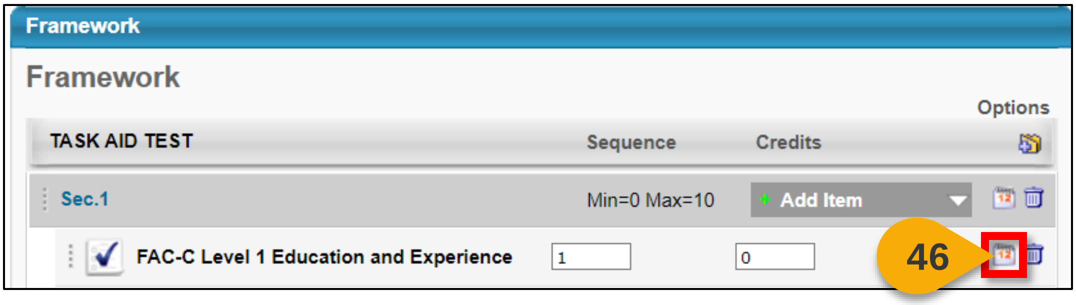


# Create Certifications (Cont.17)

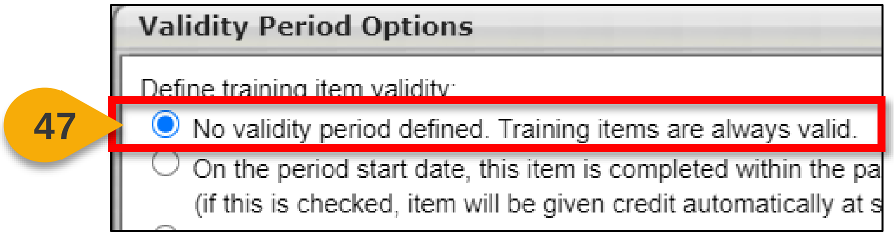
**Step 45d**: Click on the **title of the checklist** to add it to the framework. It will then appear under the section you're working on.




**Step 46:** If desired, you can set a validity period for each Learning Object and/or section. Click the **Calendar icon** to choose the Validity Period options. You will also have the ability to set this for the entire Certification on the next tab.

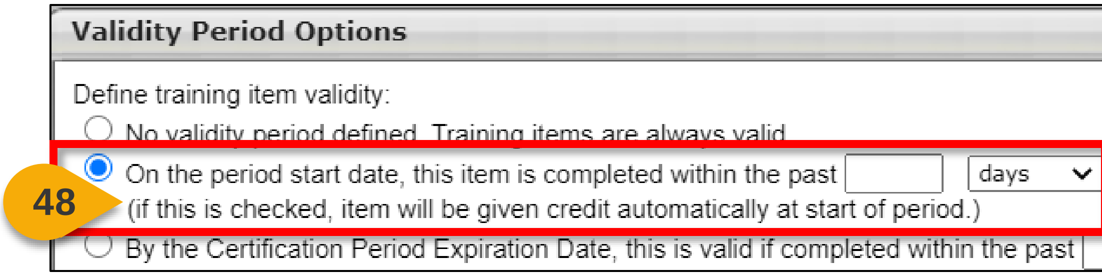



**Step 47:** Click **No Validity Period defined. Training items are always valid.** to allow users to apply training taken at any time.

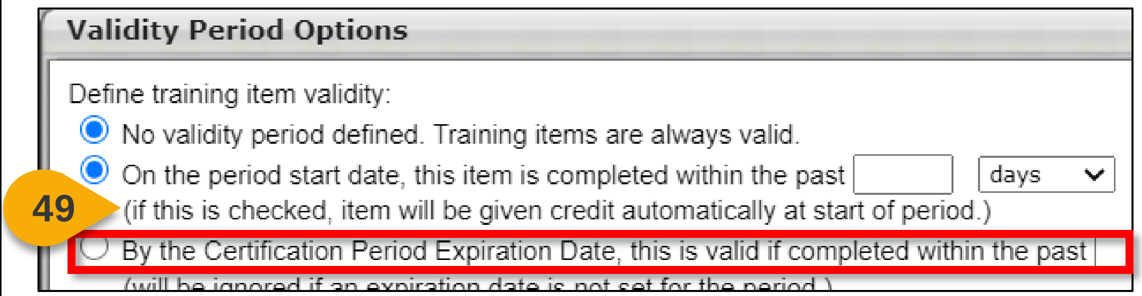


# Create Certifications (Cont.18)

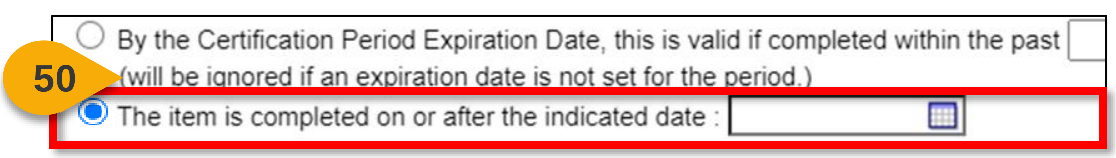
**Step 48**: Click **On the period start date, this item is completed within the past ____** to have the training item be valid if taken within the number of days entered when the period for the Certification begins.



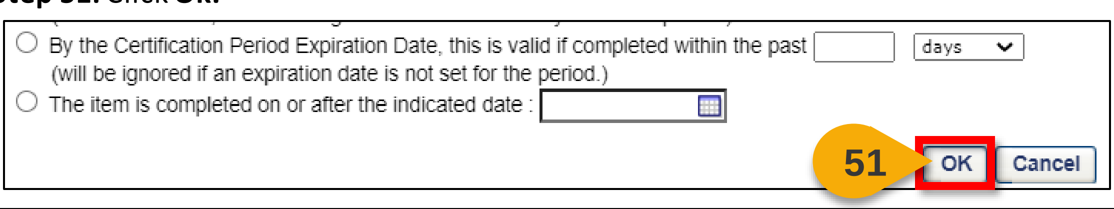

**Step 49:** Click **By the Certification Period Expiration Date, this is valid if completed within the past __** to have the training item be valid if taken with the number of days entered prior to when the Certification expires.




**Step 50:** Click **The item is completed on or after the indicated date** to set a specific date for the Validity Period.

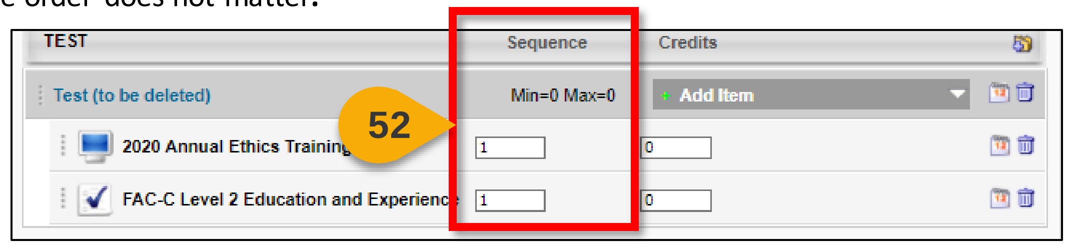



**Step 51:** Click **Ok.**

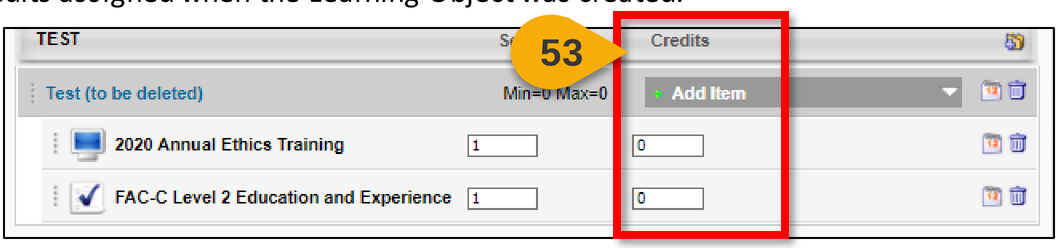


# Create Certifications (Cont.19)

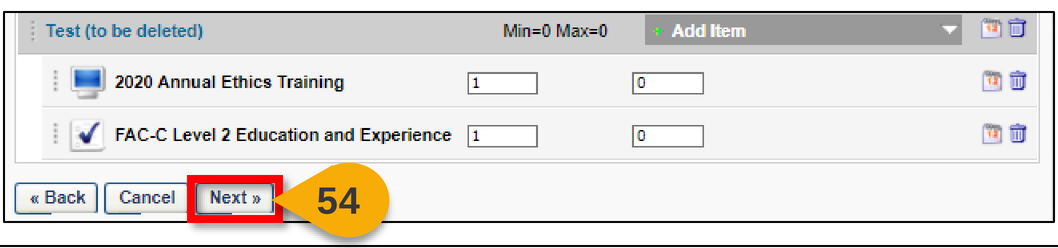
**Step 52:** For each Learning Object, you can define a required sequence for objects to be taken in by applying an order in the **Sequence** column. Leave all fields equal to 1 if the order does not matter**.**



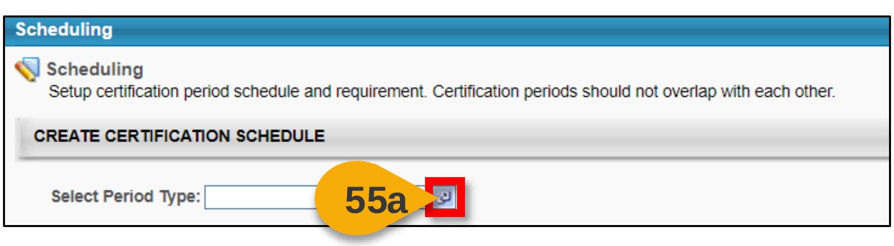

**Step 53:** For each Learning Object, define the number of CLPs or Completions the Learning Object is worth in the **Credits** column. The value put here will override any credits assigned when the Learning Object was created.




**Step 54:** Click **Next** to navigate to the Scheduling tab.




**Step 55a:** Click the blue **popout** icon next to the Select Period Type field to select an option for the Certification Period.



# Create Certifications (Cont.20)

**Step 55b:** Select **One Time Only** to only have this period occur once and not expire.

All of the renewal periods must be consistent within a certification.
Please select certification period type

**One Time Only:** This Certification does not have a renewal period. **55b**

**Fixed Date:** Renews the same time every year.
*(e.g. Every year on April 15th)*

**Step 55c:** Select **Fixed Date** to have the period renew at the same time each year.

All of the renewal periods must be consistent within a certification.
Please select certification period type

**One Time Only:** This Certification does not have a renewal period.

**Fixed Date:** Renews the same time every year. **55c**
*(e.g. Every year on April 15th)*

**Step 55d:** Select **Relative** to have the renewal periods are based on the date Users get certified for the first time.

**Relative:** Renewal periods are based on the date users getting certified for the first time. **55d**
*(e.g. 180 days after user's initial certification and every 180 days thereafter)*

**Relative with Rolling period:** Renewal period begins immediately upon users getting certified.
*(e.g. If certification expiration date is 12/31/2010, but the user completes training on 6/30/2010, next renewal period will begin immediately from 6/30/2010)*

**Step 55e:** Select **Relative with Rolling period** to have the renewal period begin immediately upon Users getting certified.

**Relative:** Renewal periods are based on the date users getting certified for the first time.
*(e.g. 180 days after user's initial certification and every 180 days thereafter)*

**Relative with Rolling period:** Renewal period begins immediately upon users getting certified. **55e**
*(e.g. If certification expiration date is 12/31/2010, but the user completes training on 6/30/2010, next renewal period will begin immediately from 6/30/2010)*

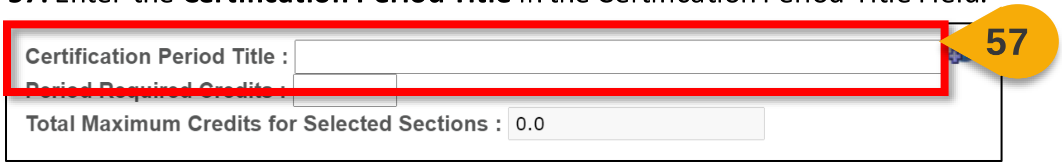
**Step 56:** Click **Select.**

*6/30/2010, next renewal period will begin immediately from 6/30/2010)*

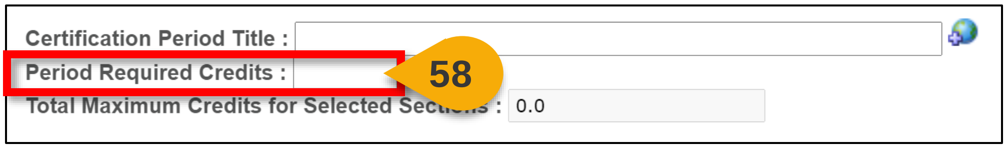
**56** Select Cancel

# Create Certifications (Cont.21)

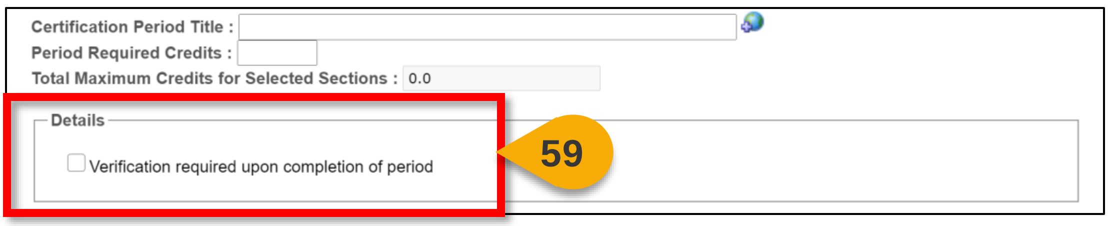
**Step 57:** Enter the **Certification Period Title** in the Certification Period Title Field.




**Step 58:** Enter the required credits to satisfy requirements for this period in the **Period Required Credits** field.



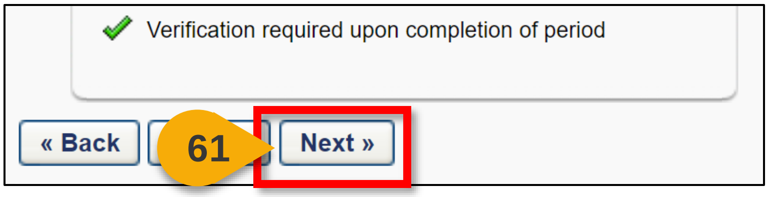

**Step 59**: Mark the **Verification required upon completion of period** checkbox to require the certification to be verified after the period for training for the Certification has ended. The User's status remains In Progress until the administrator verifies completion. We do not recommend using this setting.



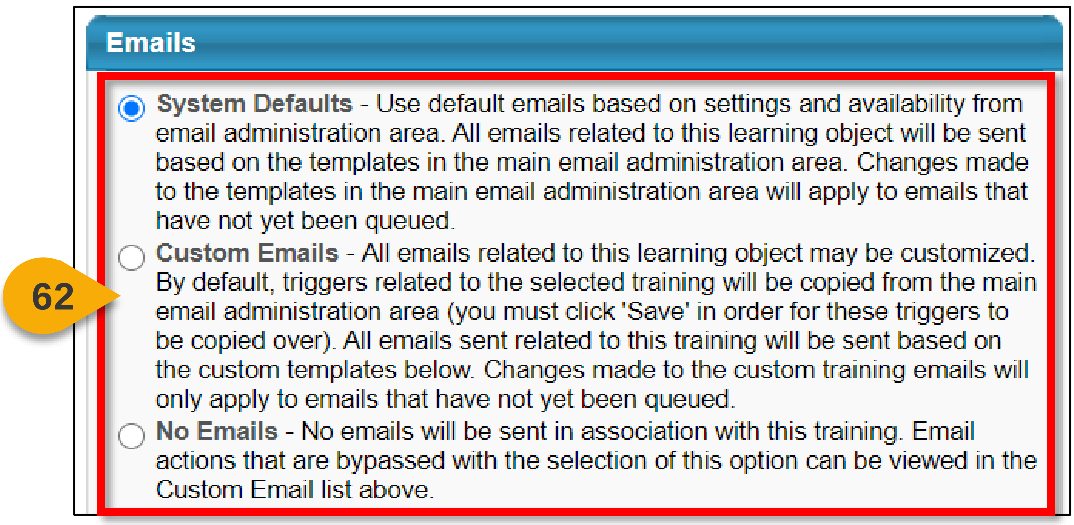

**Step 60:** In the **Select Applicable Sections** field, mark the checkboxes next to the Sections you want to include in the Certification. Your selection will appear on the Scheduling page. These selections will populate the Total Maximum Credits for Selected Sessions field above.

# Create Certifications (Cont.22)

**Step 61:** Click **Next** to navigate to the Emails tab.

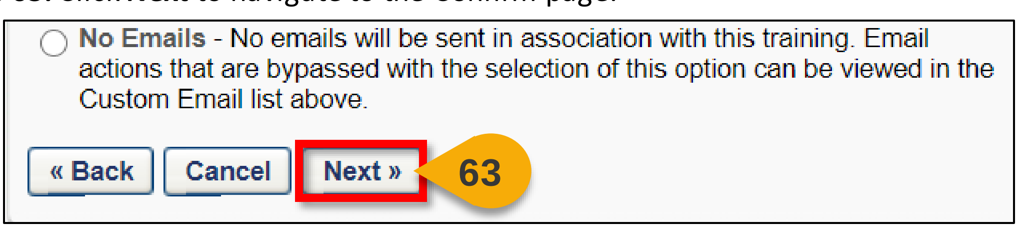



**Step 62:** Select one of the three **Email Configuration options.**



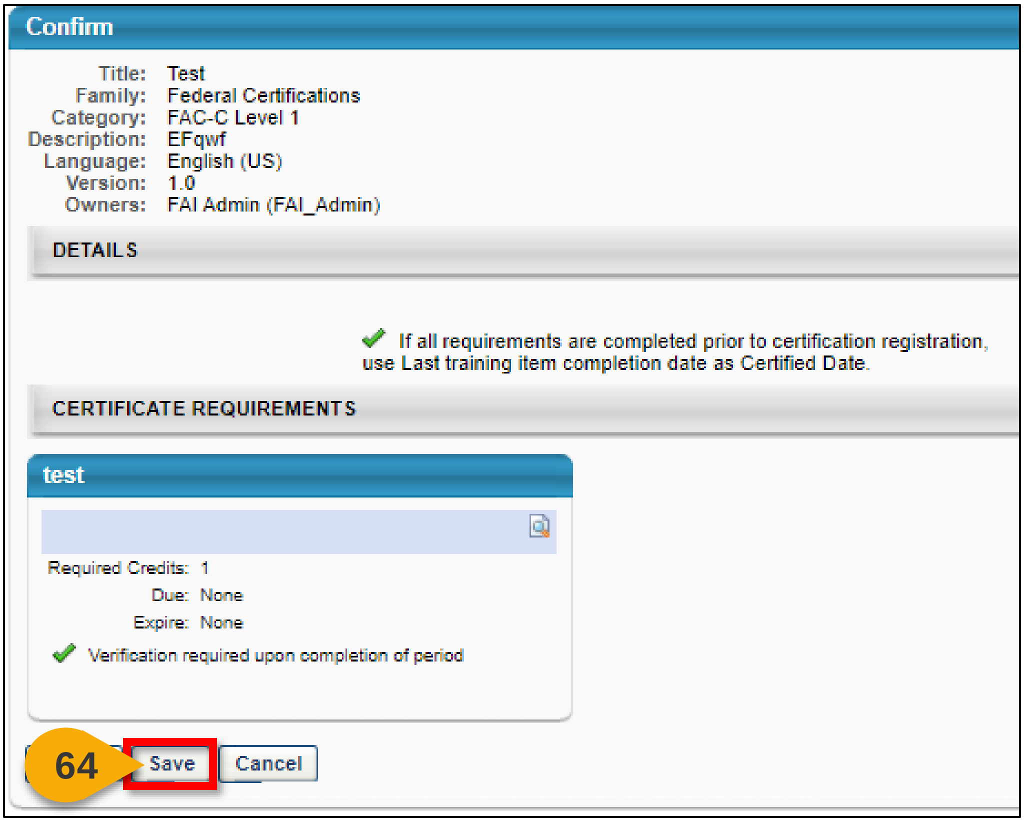

1. **System Defaults**: All emails related to this learning object type will be triggered based on the active email templates in Email Administration.
2. **Custom Emails**: All emails related to this training will be sent based on the custom templates setup.
3. **No Emails**: No emails will be sent in association with this learning object.

**Step 63:** Click **Next** to navigate to the Confirm page.



# Create Certifications (Cont.23)

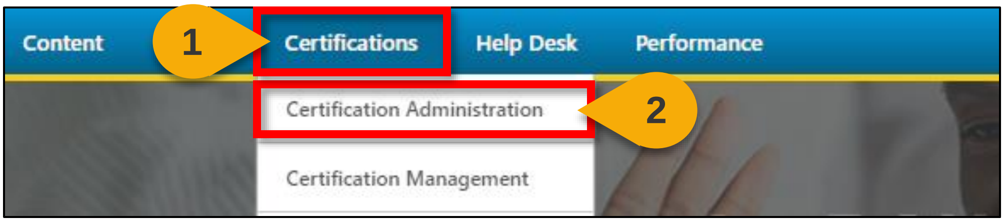
**Step 64:** Review the configurations on the Confirm page and click **Save.** The Certification will now appear on the Certification Management page.



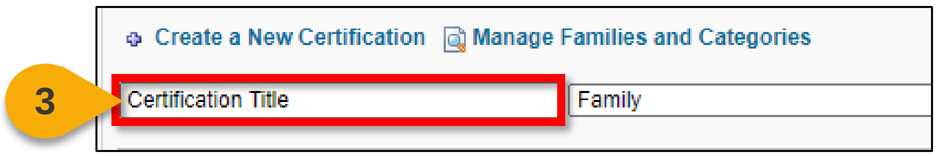
# Edit a Certification

*When you want to modify a Certification…*

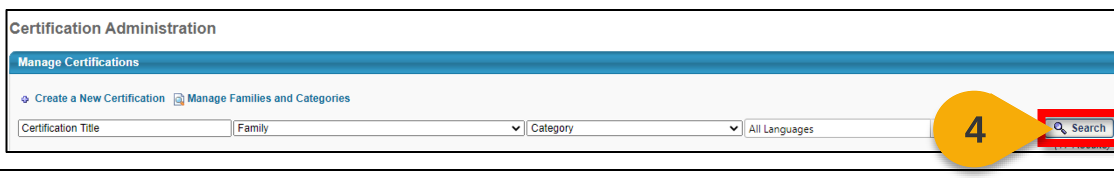
**Steps 1 & 2:** Hover over the **Certification** tab, then click **Certification Administration**.



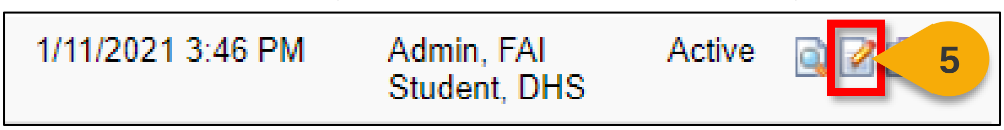

**Step 3:** Type in the name of the Certification in the **Certification Title** field. Alternatively, you can use the other search criteria available on this page.



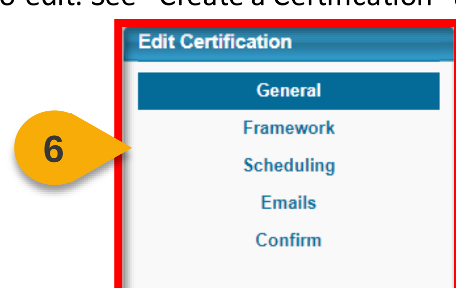

**Step 4:** Click **Search**.




**Step 5:** Click the **Pencil and Paper** icon to edit the Certification of your choice.



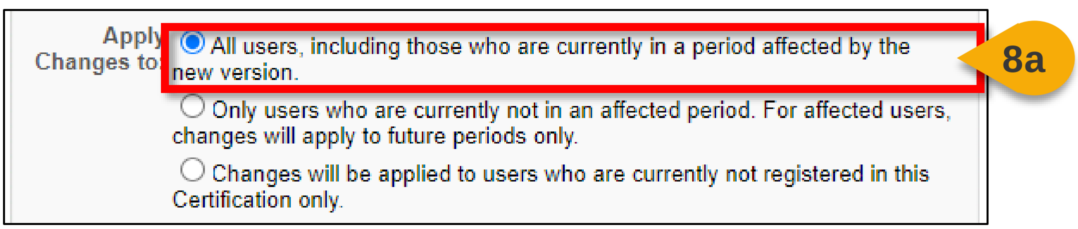

**Step 6:** Use the **Navigation Links** in the box on the left side of the screen to move to the sections you wish to edit. See "Create a Certification" task aid for specifics on each section.



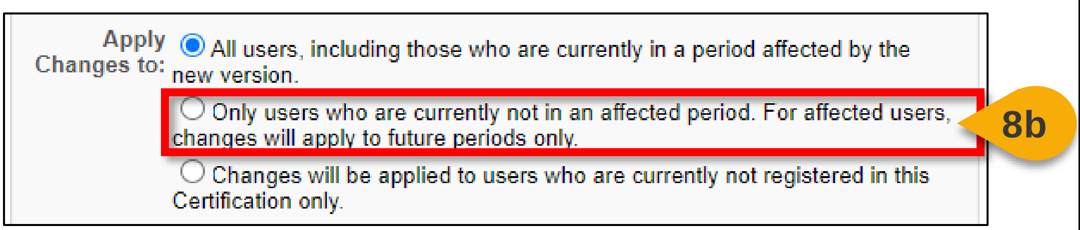
# Edit a Certification (Cont.1)

**Step 7:** Click **Save** on any tab when you are finished. Click Cancel to undo any changes that have not been saved. You will be taken back to the Certification Administration page.


**Step 8a:** A popout will appear that will ask you to define the versioning option you prefer. Select **All users, including those who are currently in a period affected by the new version** to apply the new version to all Users, including Users who are currently within in the Certification period.

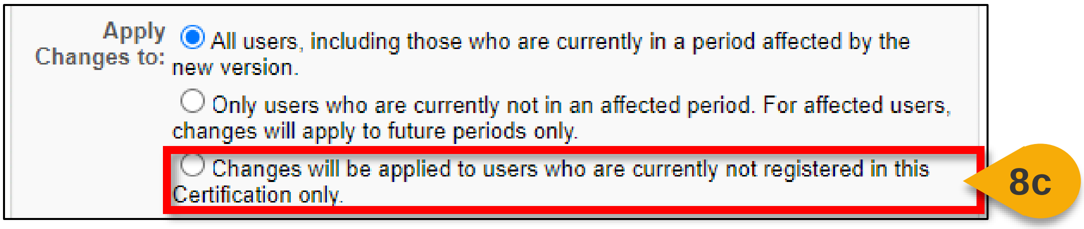



**Step 8b:** Select **Only users who are currently not in an affected period. For affected users, changes will apply to future periods only** to apply the new version to future Users periods of the Certification only.

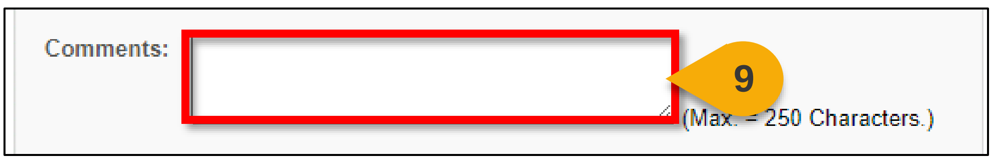


# Edit a Certification (Cont.2)

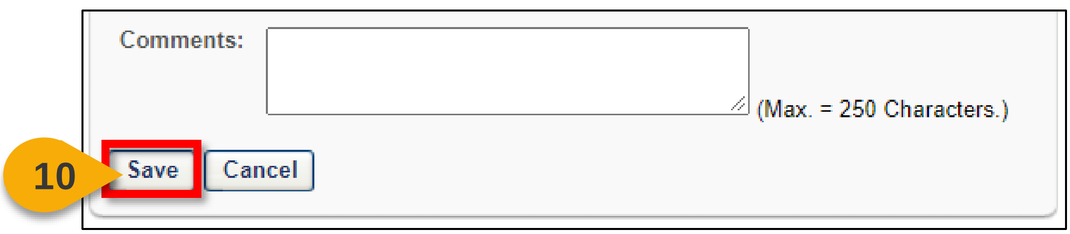
**Step 8c:** Select **Changes will be applied to users who are currently not registered in this Certification only** to apply the new version only to people who are not currently registered for the Certification.




**Step 9:** Enter any comments in the **Comment** field.



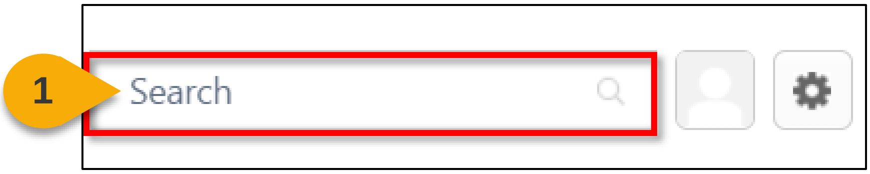

**Step 10:** Click **Save**. You will be taken back to the Curriculum Administration page.



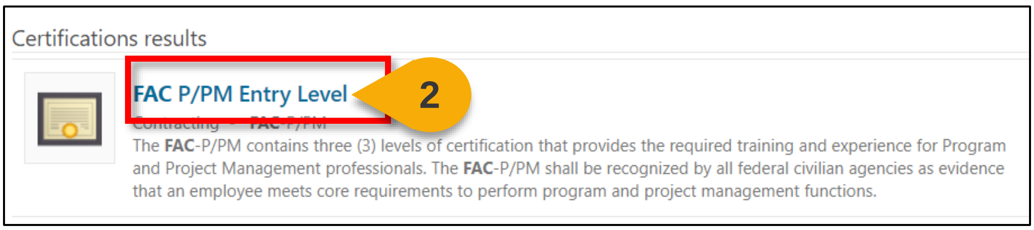
# Request and Manage a Certification

*When you want to request a Certification…*

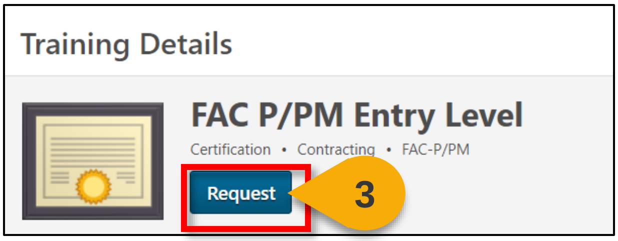
**Step 1: In Global Search, type in the Certification you wish to request and click the Magnifying Glass.**



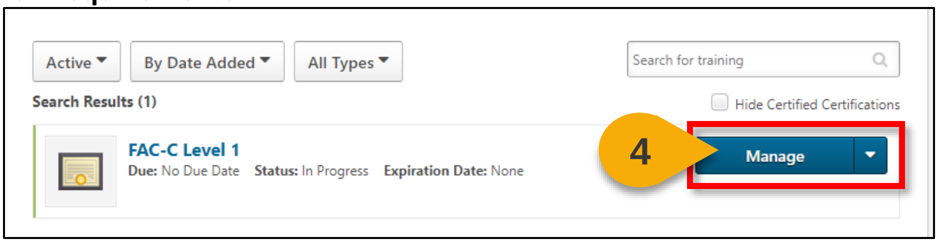

**Step 2: Click on the Certification you'd like in the results.**




**Step 3: Click the Request button for the Certification of your choice.**

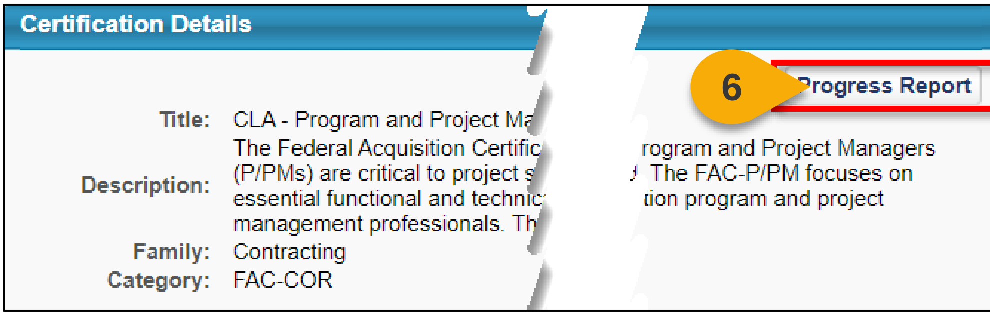



**Step 4: You will be directed to your Transcript page. The Certification will be listed on the screen under Active courses with "In Progress" status. Click Manage to view the Certification requirements.**

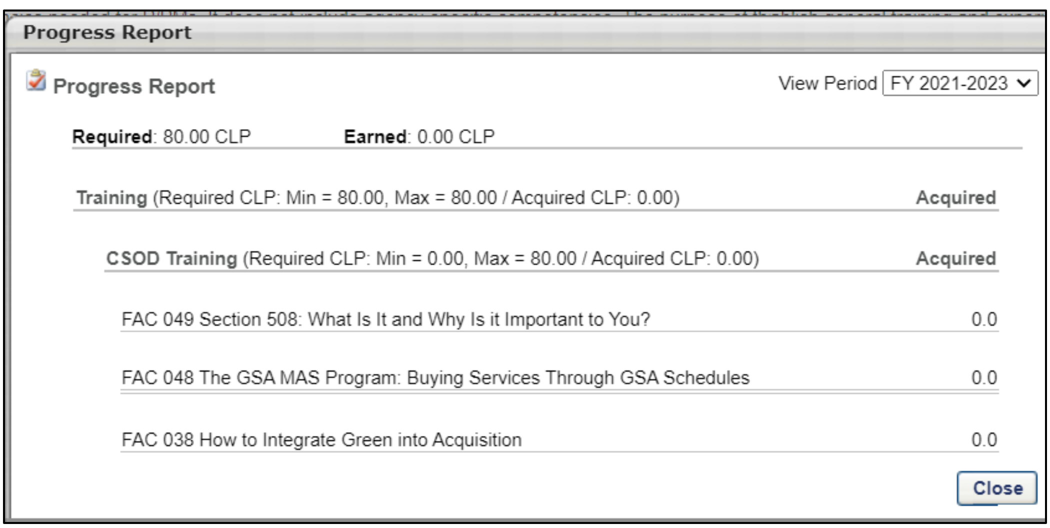


# Request and Manage a Certification (Cont.1)

**Step 6: From the Certification Details page, you can see what training needs to be completed to satisfy the certification requirements by clicking Progress Report.**



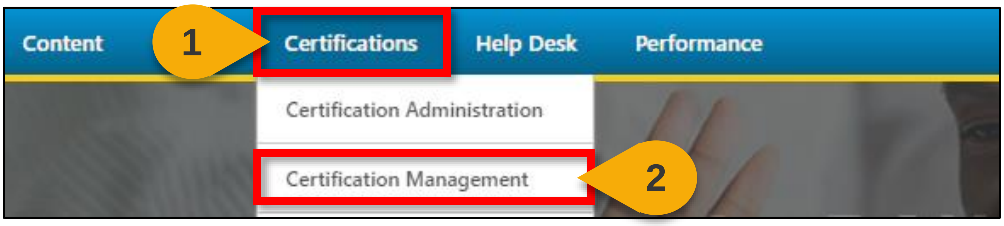

**A popup window will appear that displays the required CLPs, the CLPs earned so far, and list of trainings needed to complete the certification.**



# Revoke a Certification

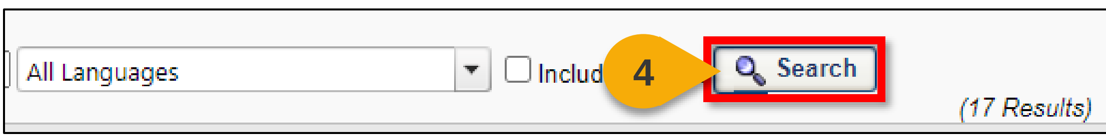
*When you want to revoke a Certification for a particular User…*

**Steps 1 & 2:** Hover over the **Certifications** tab and click **Certification Management**.



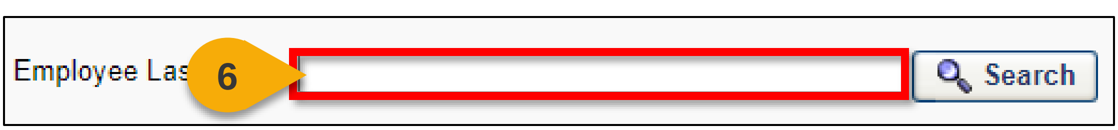

**Step 3:** Type in the name of the Certification in the **Certification Title** field. Alternatively, you can use the other search criteria available on this page.


**Step 4:** Click **Search**.



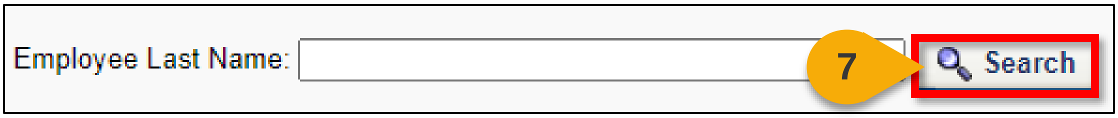

**Step 5:** Locate the Certification you wish to revoke and click the **View Users** icon in the Options column.


**Step 6:** A page will open with all the Users who have this Certification on their Transcript. Search for the User whose Certification you wish to revoke by entering their last name in the **Employee Last Name** search box.



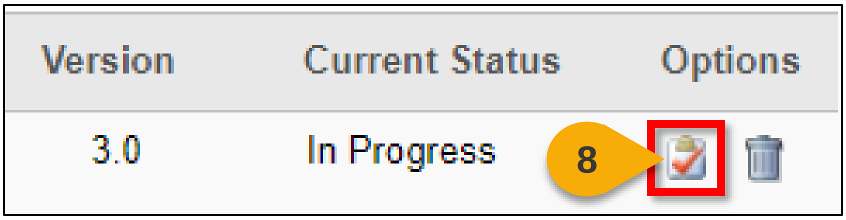
# Revoke a Certification (Cont.1)

**Step 7:** Click **Search**.

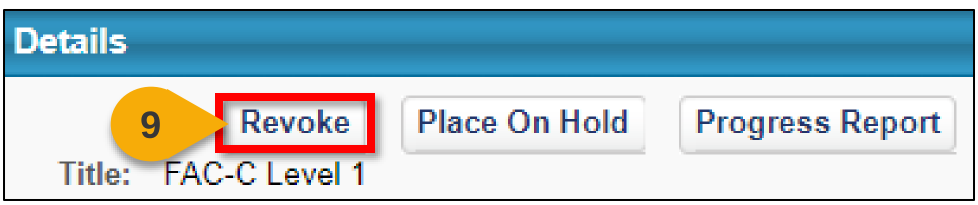



**Step 8:** Locate the User whose certification you wish to revoke. Click the **clipboard** icon in the Options column.

`



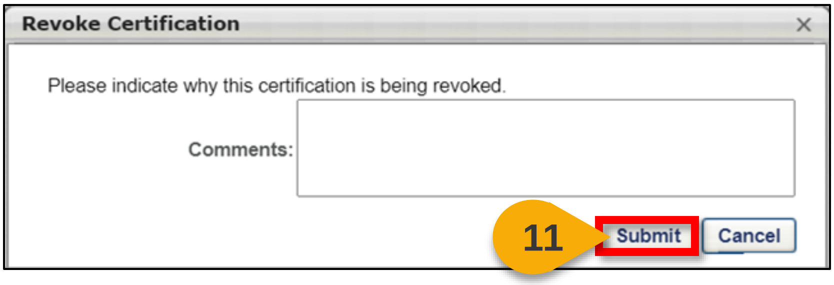

**Step 9:** In the top right corner of the screen, click the **Revoke** button.




**Step 10:** A popup warning will appear. Enter a comment in the **Comments** field to explain why the Certification is being revoked.

# Revoke a Certification (Cont.2)

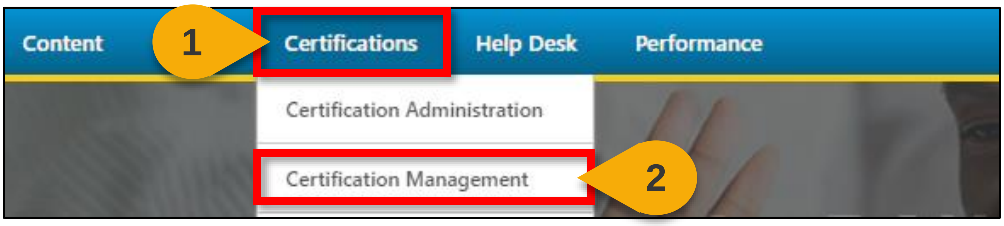
**Step 11:** Click **Submit.** The Certification Transcript page will reflect the Revoked status in the Status column. If the User would like to become re-certified, they must re-request the Certification or it must be reassigned.



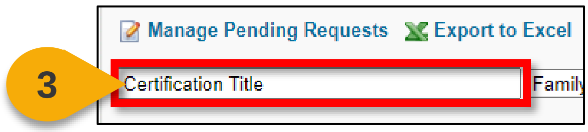
# Put a Certification on Hold

*When you want to put a User’s Certification on hold…*

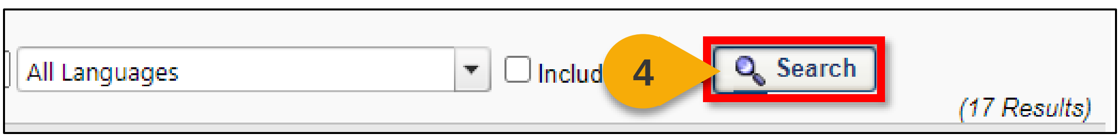
**Steps 1 & 2:** Hover over the **Certifications** tab and click **Certification Management**.




**Step 3:** Type in the name of the Certification in the **Certification Title** field. Alternatively, you can use the other search criteria available on this page.

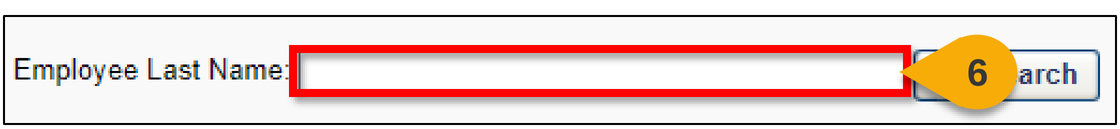



**Step 4:** Click **Search**.



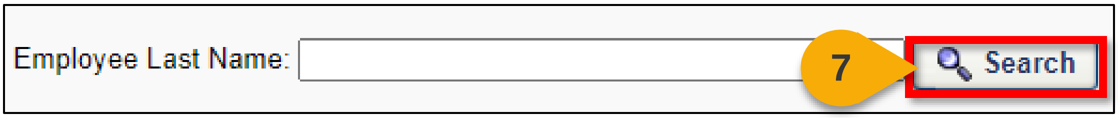

**Step 5:** Locate the Certification you wish to put on hold and click the **View Users** icon in the Options column.


**Steps 6:** A page will open with all the Users who have this Certification on their Transcript. Search for the User you wish to place on hold by entering their last name in the **Employee Last Name** search box.

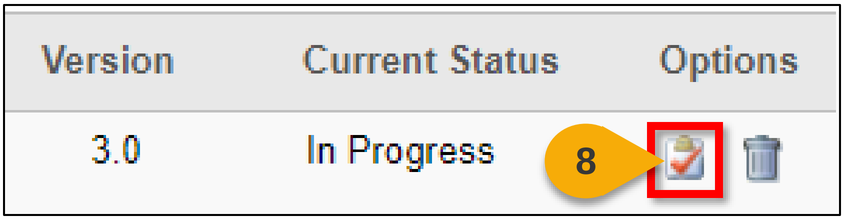


# Put a Certification on Hold (Cont.1)

**Step 7:** Click **Search**.

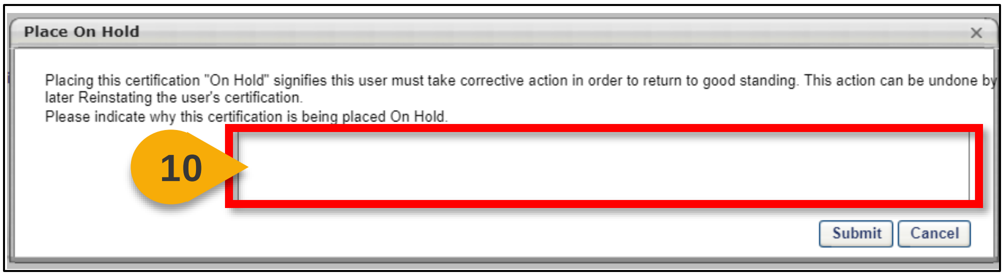



**Step 8:** Locate the User you wish to place on hold. Click the **clipboard** icon in the Options column.



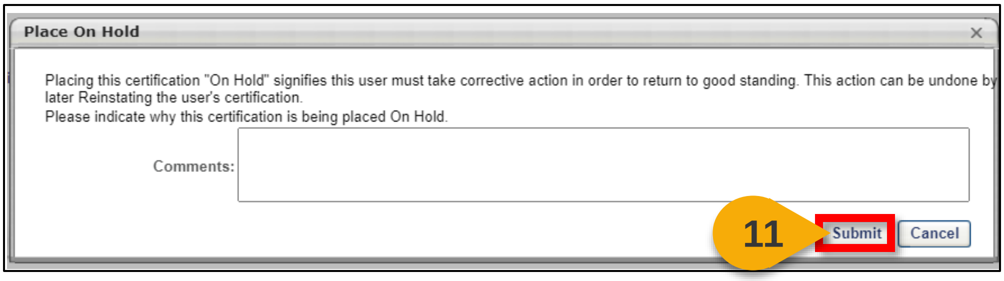

**Step 9:** In the top right corner of the screen, click the **Place On Hold** button.


**Steps 10:** A popup window will appear. Enter a comment in the **Comments** field to explain why the Certification is being put on hold.



# Put a Certification on Hold (Cont.2)

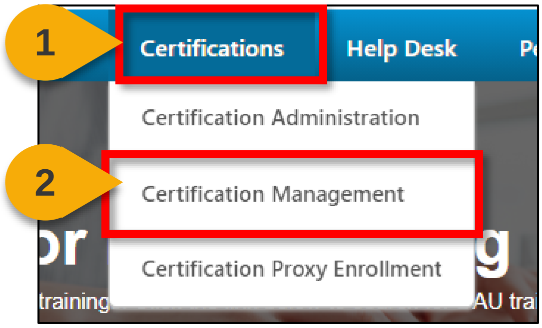
**Step 11:** Click **Submit**. The Certification will show as On Hold on the User's Transcript. To reinstate the Certificate, follow the steps in this task aid. You will see an option to Reinstate the Certification where the On Hold option was previously.



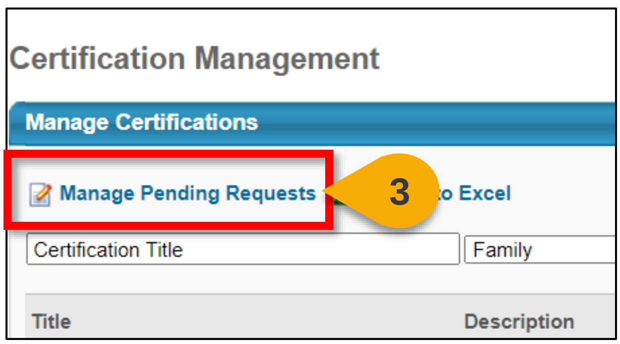
# Approve or Deny External Training Request

*When you want to approve or deny an external training request…*

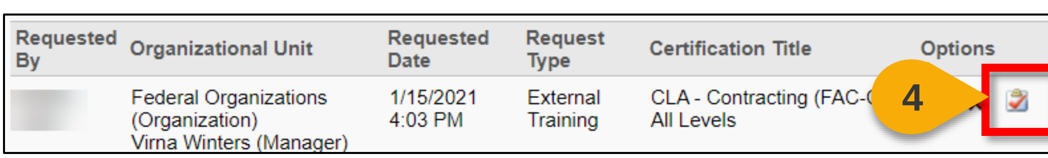
**Steps 1 & 2:** Hover over the **Certifications** tab and then click **Certification Management**.




**Step 3:** At the top of the page, click the **Manage Pending Requests** link.

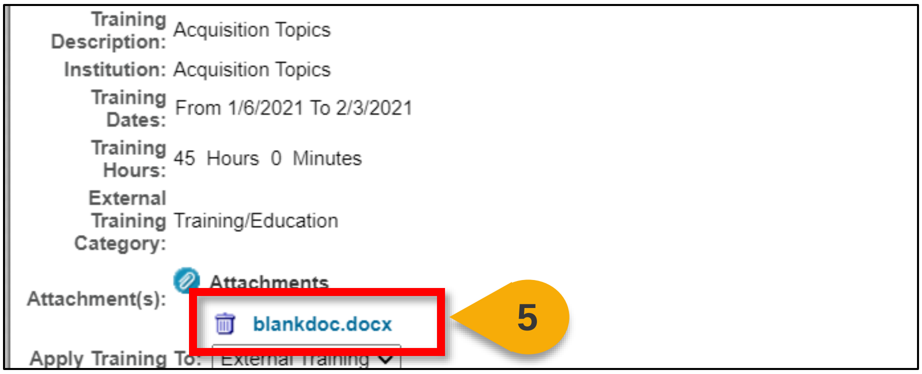



**Step 4:** You will see all Pending External Training Requests for Certifications you are a Certification Owner for. For each item you wish to take action on, click the **clipboard** icon to manage the request.

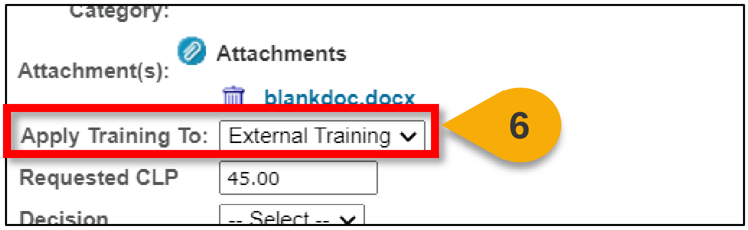


# Approve or Deny External Training Request (Cont.1)

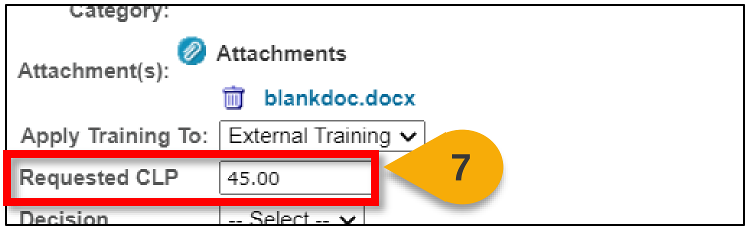
**Step 5:** Review the information entered by the User who submitted the request. Click the **links** in the Attachments field to view the attachments provided by the User.




**Step 6:** In the Apply Training To field, ensure the User has selected **External Training** to add the CLPs to the External Training section of the Certification.

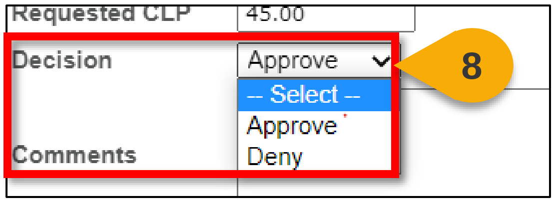



**Step 7:** If necessary, adjust the CLPs for this External Training by editing the **Requested CLP** field.

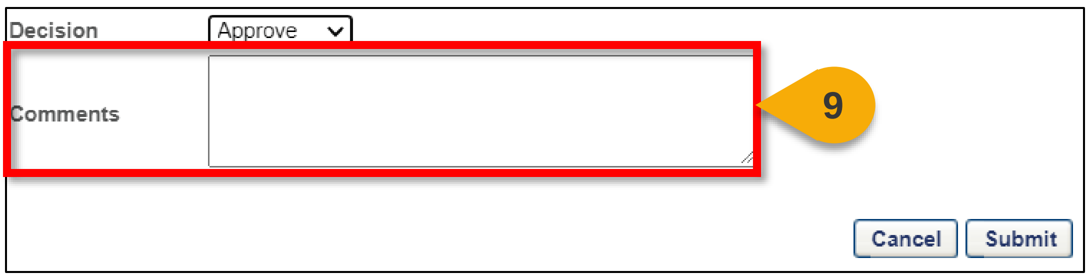


# Approve or Deny External Training Request (Cont.2)

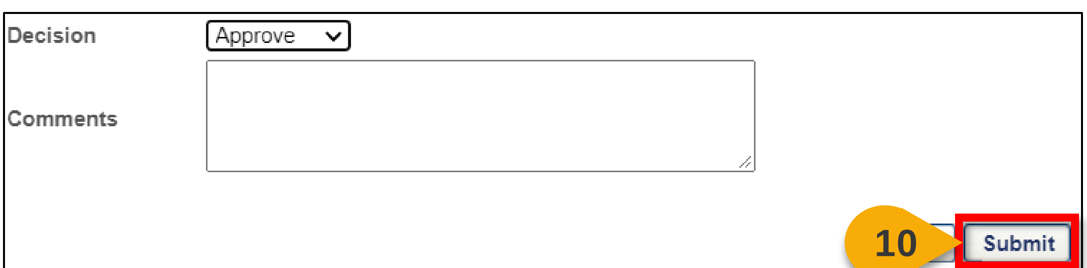
**Step 8:** Use the **Decision** drop-down to indicate whether the request is Approved or Denied.




**Step 9:** Enter comments in the **Comments** field to justify the approval or denial.




**Step 10:** Click **Submit**. The approval or denial will process and be updated on the User's Transcript. You will be returned to the View Certification Requests page.

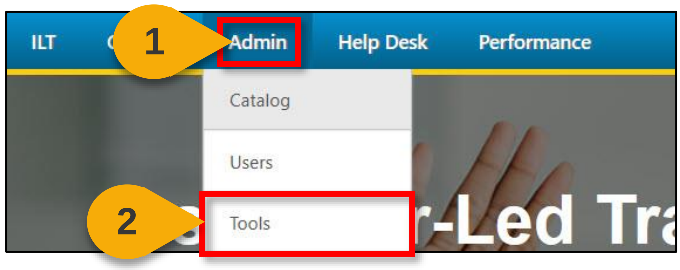


# Checklist Management

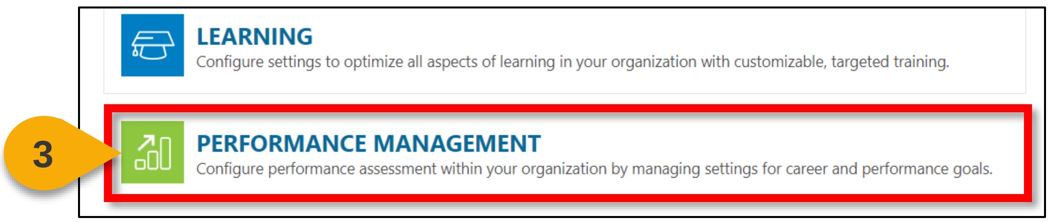
# View and Edit Checklists

*When you want to access and modify a Checklist…*

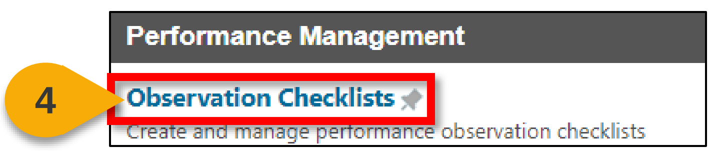
**Steps 1 & 2:** Hover over the **Admin** tab, then select **Tools.**



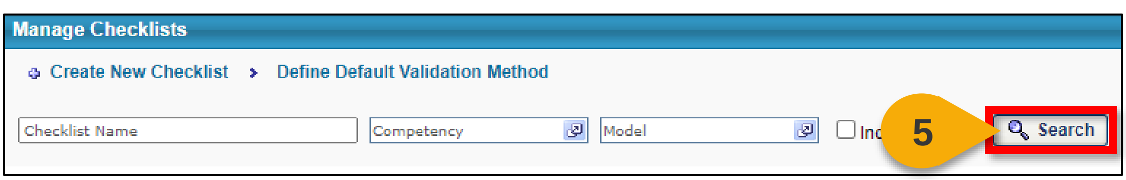

**Step 3:** Select **Performance Management**.



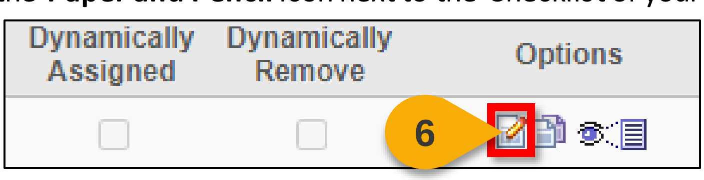

**Step 4:** Click on **Observation Checklists**.




**Step 5:** Enter the appropriate search criteria for the Checklist you'd like to locate and click **Search**.



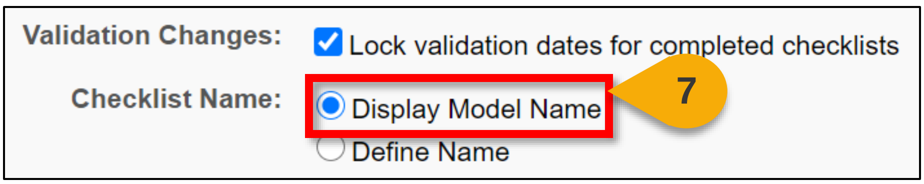

**Step 6:** Click on the **Paper and Pencil** icon next to the Checklist of your choice.



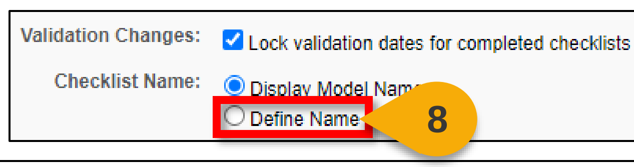
# View and Edit Checklists (Cont.1)

**Step 7:** You will only be able to edit certain fields. To change fields that cannot be edited, you must create a copy of the checklist and then change the required fields, creating a new version of the Checklist.

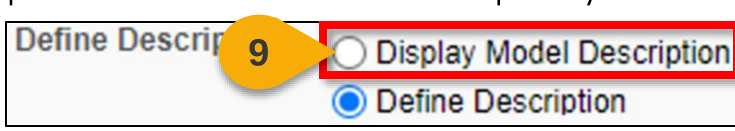
Next to Checklist Name, you can choose to how you want the name of the Checklist to display. If you choose **Display Model Name**, this option will keep the Checklist name the same as the associated competency model.



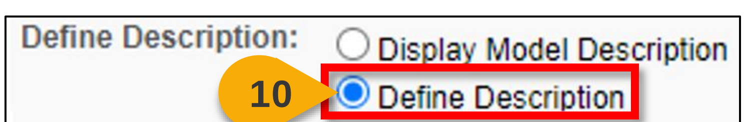

**Step 8:** Next to Checklist Name, you can choose **Define Name**. A text field will appear where you can enter the desired checklist name.




**Step 9:** Next to Define Description, select **Display Model Description** to keep the checklist description the same as the associated competency model.

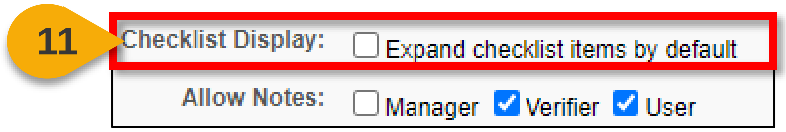



**Step 10:** Next to Define Description, select **Define Description** to define a unique description for the competency model. A blank text field displays below the radio button. Enter the description you would like to use. It is automatically updated for end Users, verifiers, and the administrator.

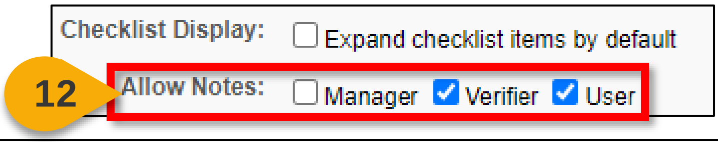


# View and Edit Checklists (Cont.2)

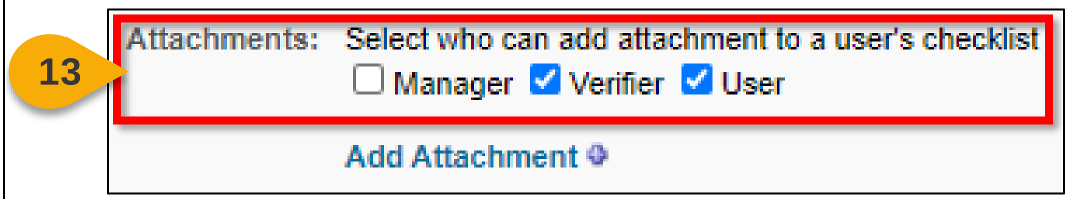
**Step 11:** Mark the **Checklist Display** checkbox to automatically expand checklist items by default. Leave it unmarked to keep the checklist items minimized.




**Step 12:** Mark the **Allow Notes** checkboxes to select which roles (Manager, Verifier, and/or User) can leave comments or notes at the Competency Details page level. If no role is selected, notes and comments are disabled for the checklist.



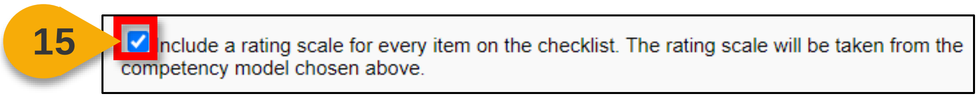

**Step 13:** Mark the **Attachments** checkboxes to select which roles can add attachments to a User's checklist. Options are Manager, Verifier, and/or User. If no role is selected, attachments are disabled for the checklist. Up to three attachments can be added total between all Users with the ability to add an attachment. Acceptable file types are: Word, Excel, PowerPoint, pdf, txt, rtf, gif, jpg and the maximum size is 1 MB.



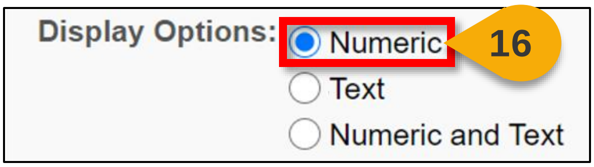

**Step 14:** Click **Add Attachment** to add any attachments to the checklist. Acceptable file types are: Word, Excel, PowerPoint, pdf, txt, rtf, gif, jpg and the maximum size is 1 MB.

# View and Edit Checklists (Cont.3)

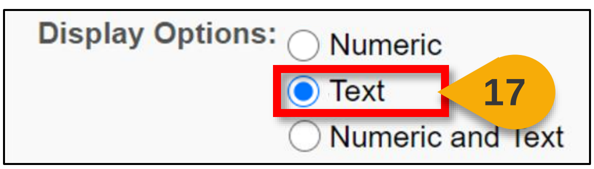
**Step 15:** Under the Rating Scale options, select Include a rating scale for every item on the checklist. The rating scale will be taken from the competency model chosen above.



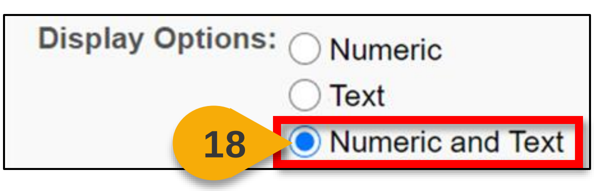

**Step 16:** In the Display Options, you can select how the checklist appears: numerically, textually, or both. When **Numeric** is selected, only the numeric score value is displayed.




**Step 17:** When **Text** is selected in Display Options, only the text rating value is displayed; this option is only available if Rating is selected as the Scale Type.

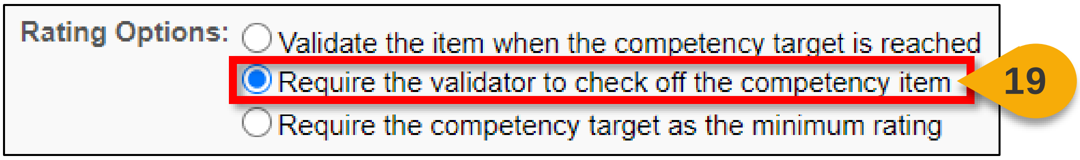



**Step 18:** When the **Numeric and Text** option in Display Options is selected, it displays both the numeric and text rating values.

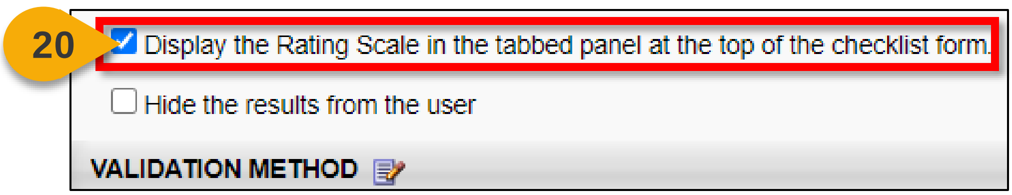


# View and Edit Checklists (Cont.4)

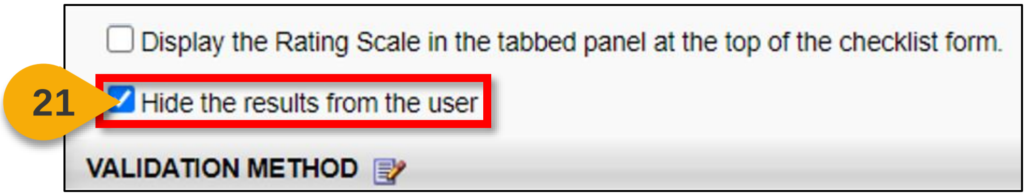
**Step 19:** In the Rating Options field, you can select the Rating Options for the competency. It is recommended to select **Require the validator to check off the competency item** for Federal Organizations Users.



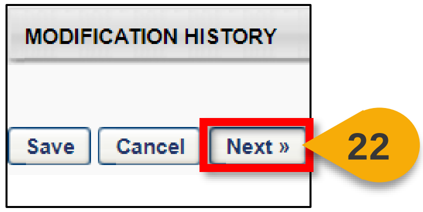

**Step 20:** Mark the **Display the rating scale in the tabbed panel at the top of the Checklist form** checkbox to display the rating scale in a tab within the Checklist.




**Step 21:** Leave the **Hide the results from the user** checkbox unchecked to allow User's to see their results after the Checklist is complete.

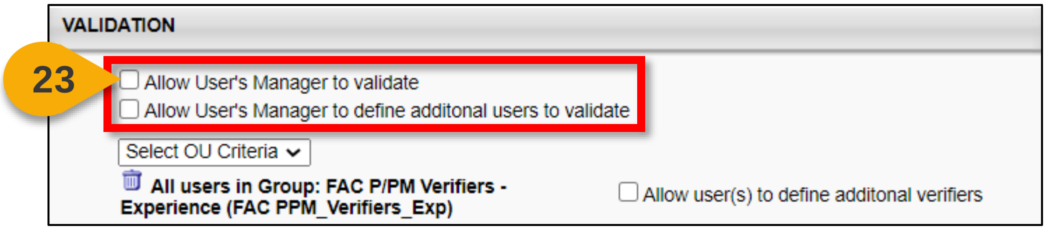



**Step 22:** Click **Next** to move to the Preferences page.

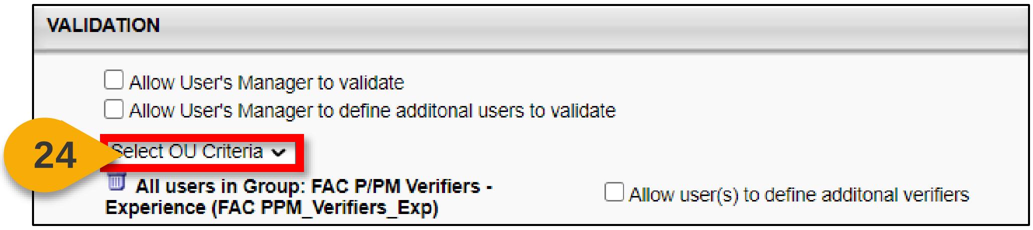


# View and Edit Checklists (Cont.5)

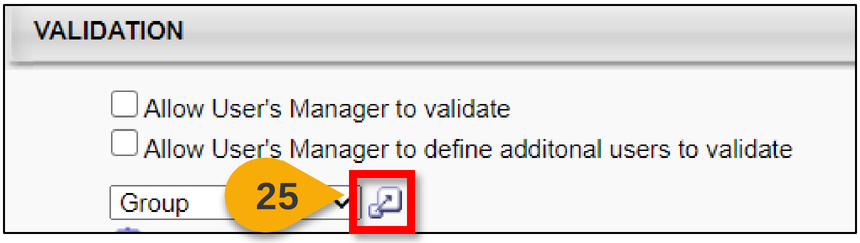
**Step 23:** In the **Validation** section, select who can act as a verifier for a User's checklist.



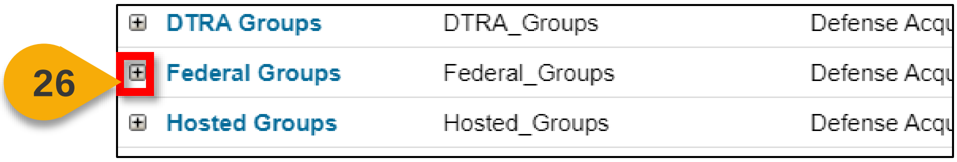

**Step 24:** For Federal Organizations checklists, click the **Select OU Criteria** dropdown to define verifiers for the Checklist by Organizational Unit (OU).




**Step 25:** Use the **popout** icon that appears after you make your selection to define the Group you wish to have the ability to validate this checklist.

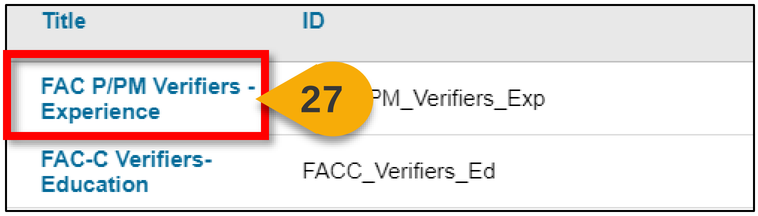



**Step 26:** In the new window that opens, use the gray plus sign to drill down to the Group you'd like to select.

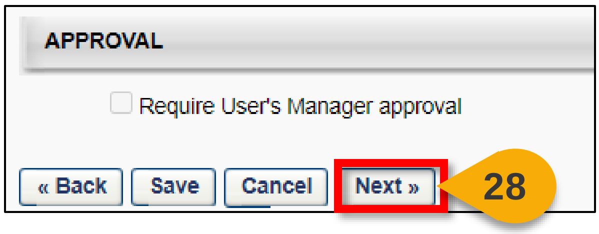


# View and Edit Checklists (Cont.6)

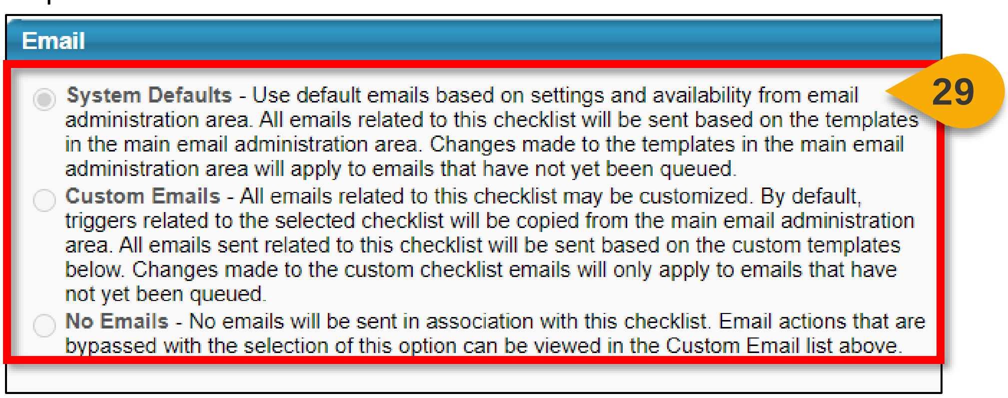
**Step 27:** Click the **Group Name** to add it to the Checklist.



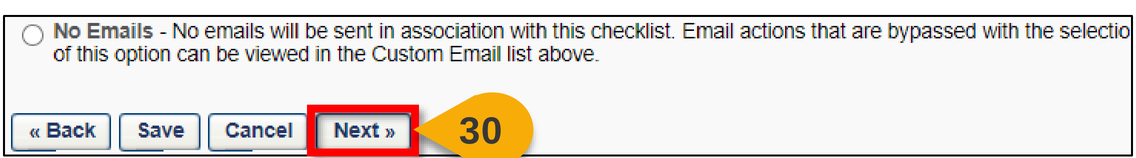

**Step 28:** Click **Next** to go to the Email tab.




**Step 29:** Select **System Defaults, Custom Emails,** or **No Emails**. You can edit the email options, but emails that are already triggered or are in queue are not updated. Only newly assigned Users or triggers firing after the change recognize the edits made to the email preference.

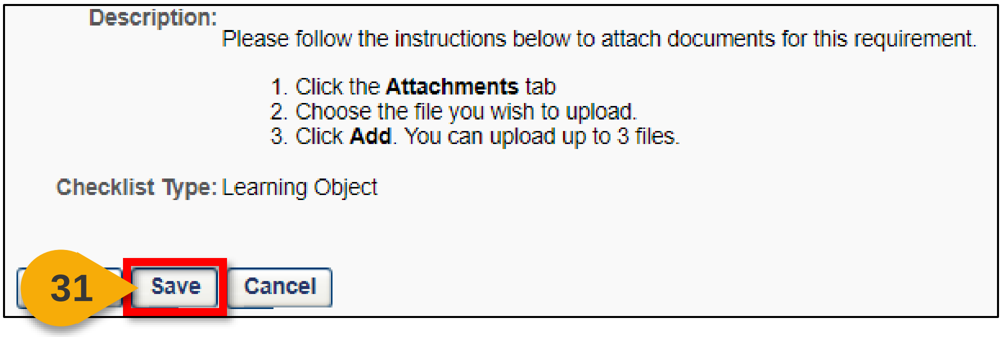



**Step 30:** Click **Next** to go to the Confirm tab.



# View and Edit Checklists (Cont.7)

**Step 31:** Review any changes on the Confirm page and then click **Save**. You will be taken back to the Checklist Administration page.

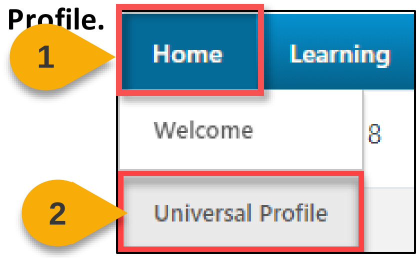


# Forms

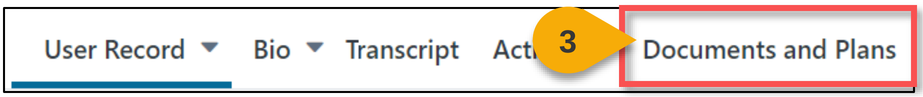
# View Submitted Forms

*When you want to see the forms you've submitted…*

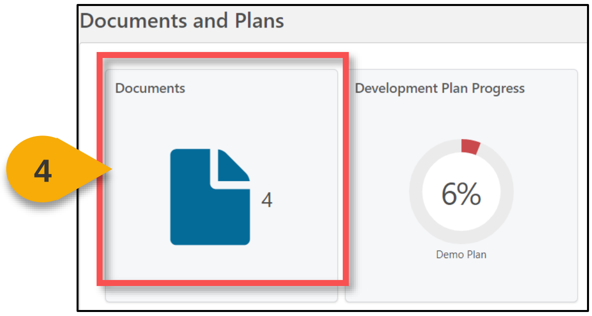
**Steps 1 & 2: Hover over Home and click Universal Profile.**



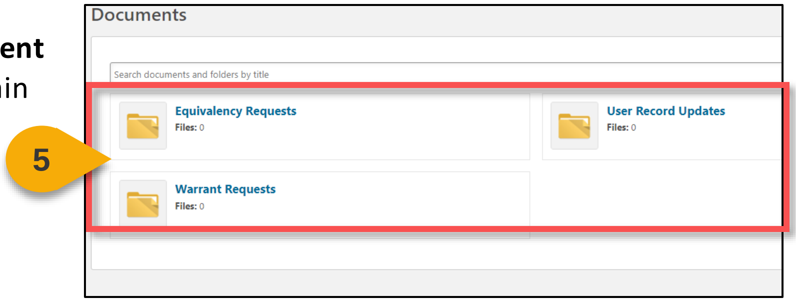

**Step 3:** Click on **Documents and Plans.**




**Step 4:** On the Documents and Plans page, click **Documents.**




**Step 5:** On the Documents page, you view your **document folders** and see which contain files.




**Equivalent Requests:** Contains Equivalent/Fulfillment Forms you have submitted.

**Warrant Requests:** Contains Warrant Forms you have submitted.

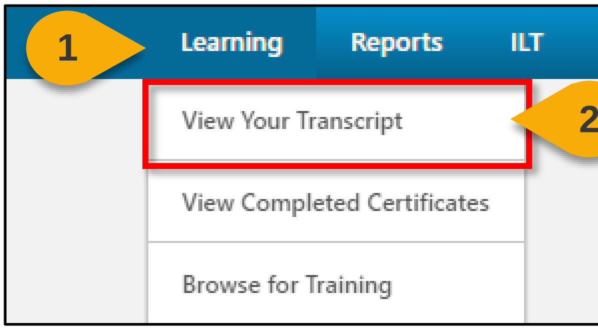
**User Record Updates:** Contains User Record Update Forms you have submitted.

# Request Education/Experience Verification

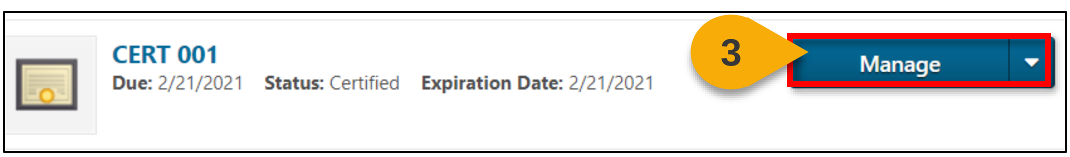
*When you need to submit an Education or Experience Verification Checklist for a Certification…*

Experience and Education Verification Checklists are used to validate experience and education requirements for Certifications.

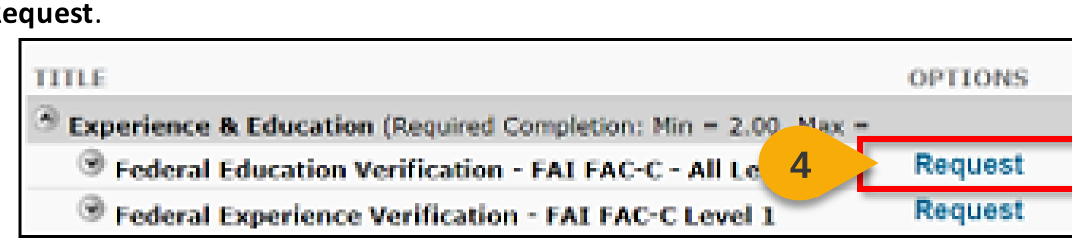
**Steps 1 & 2:** Hover over the **Learning** tab and click **View Your Transcript.**




**Step 3:** Click **Manage** next to the certification that you've completed



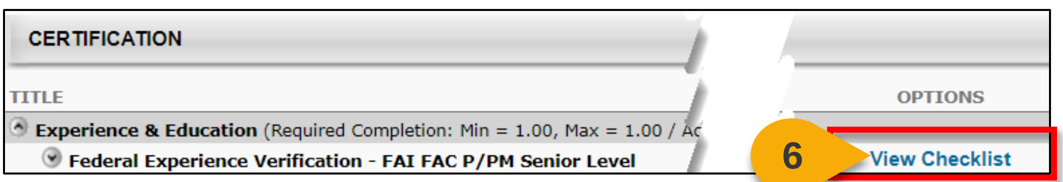

**Step 4:** Scroll down until you see **Experience and/or Education Verification** and click **Request**.



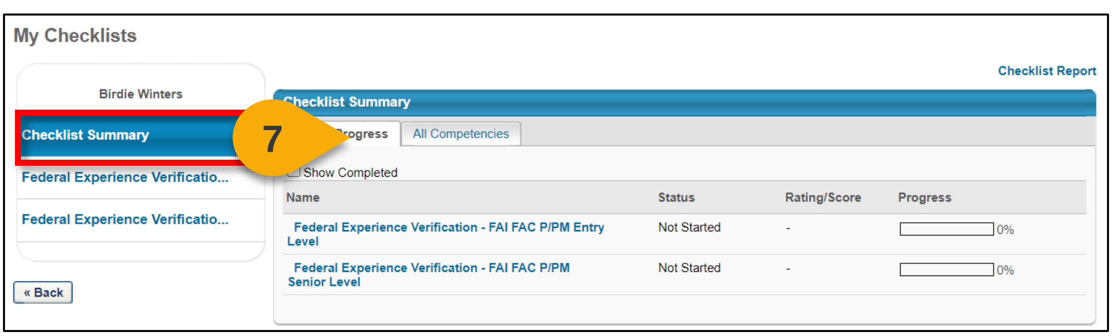
# Request Education/Experience Verification (Cont.1)

**Step 5:** After you click on Request. A popup will appear, click **Request** again.


**Step 6:** Click on **View Checklist.**

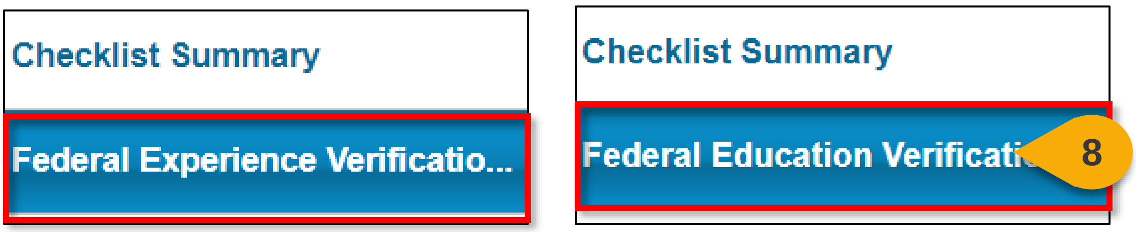



**Step 7:** Click on **Checklist Summary** to view the overall progress of any checklists associated with a certification.

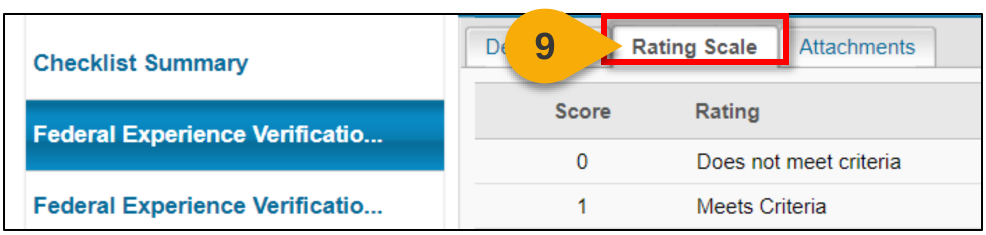


# Request Education/Experience Verification (Cont.2)

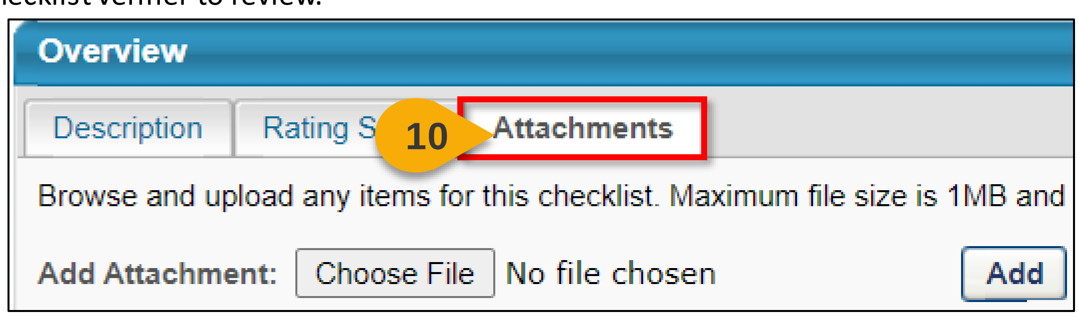
**Step 8:** Click on **Federal Education/ Experience Verification** to view instructions for the checklist.




**Step 9:** Click on the **Rating Scale** tab to view the rating scale for the checklist.

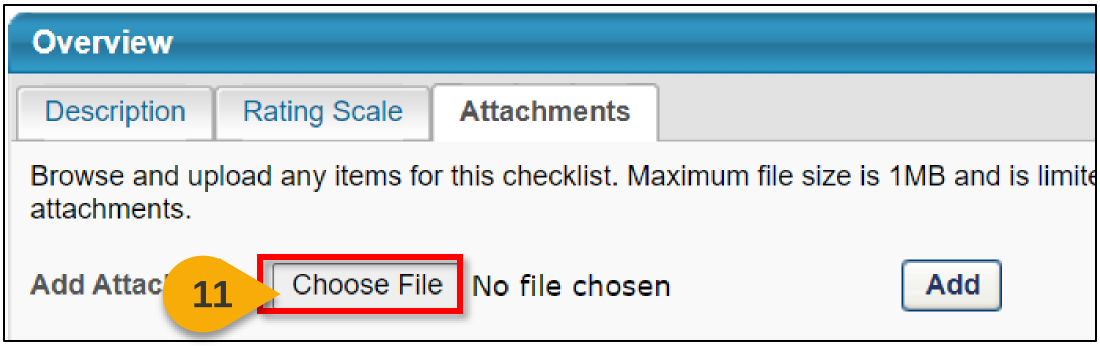



**Step 10:** Click on the **Attachments** tab to upload any necessary documents for the checklist verifier to review.

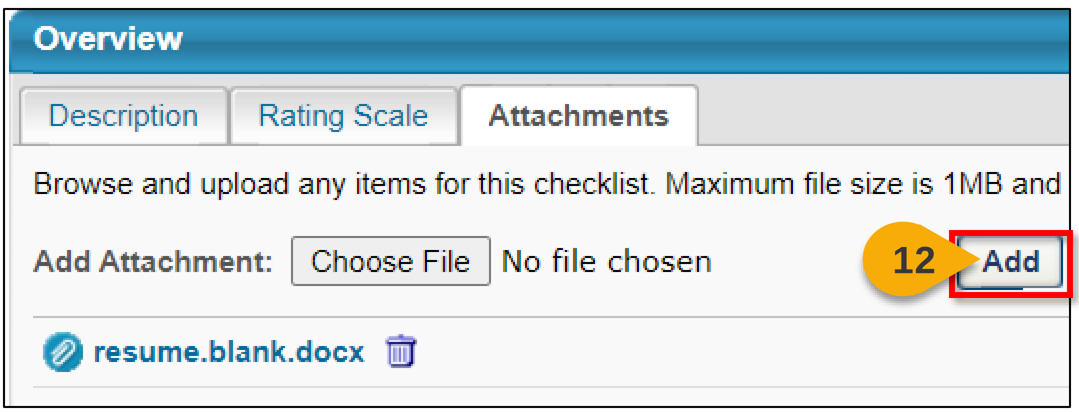


# Request Education/Experience Verification (Cont.3)

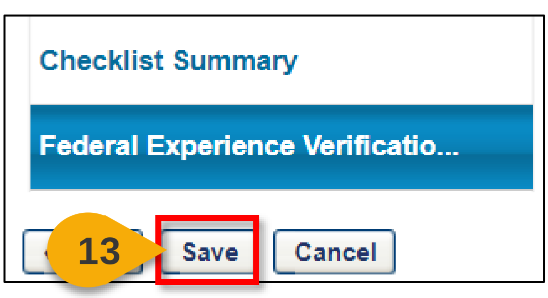
**Step 11 :** Click **Choose File** to add a copy of your resume or other relevant documents.




**Step 12 :** After you select the file, click **Add** to add the file to your Checklist.




**Step 13:** Once all the desired attachments have been added (up to 3), click **Save**. The Checklist will be routed for approval.

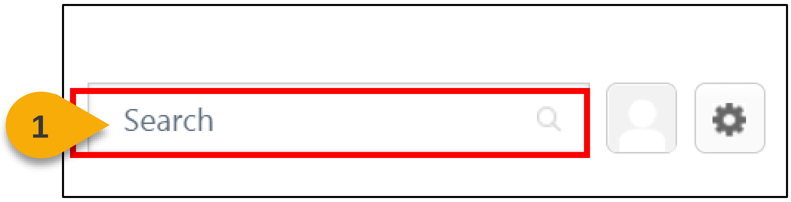


# Submit an Equivalency/Fulfillment Form

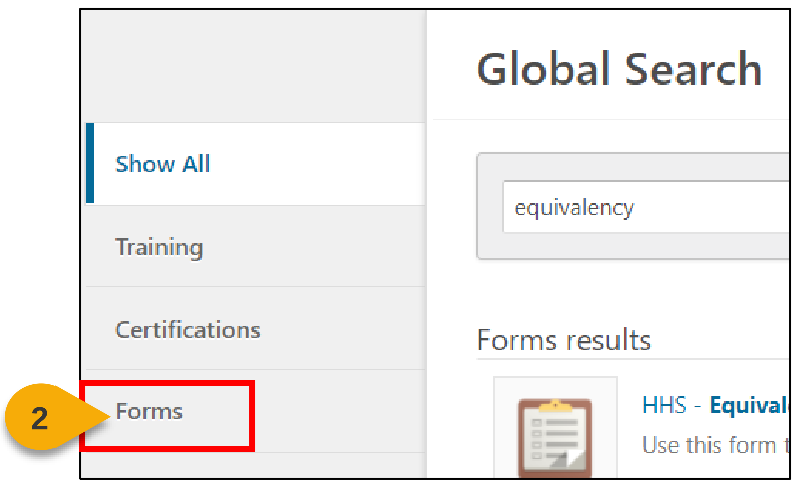
*When you want to request Equivalency or Fulfilment for a Course…*

**Use Global Search to find the Equivalency/Fulfillment form.**

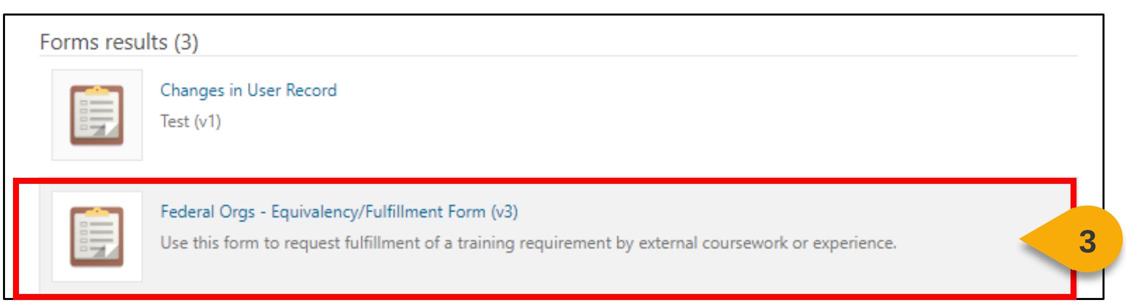
**Step 1:** Enter **Equivalency** in the Search box and click the Magnifying Glass.




**Step 2:** Click on **Forms.**

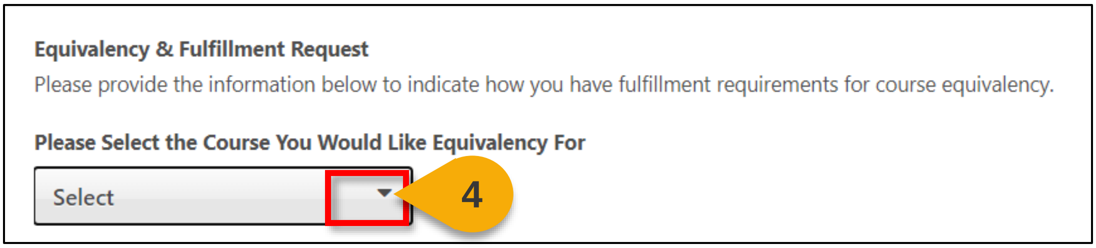



**Step 3:** Click on the **Equivalency/Fulfillment Form** for your agency.

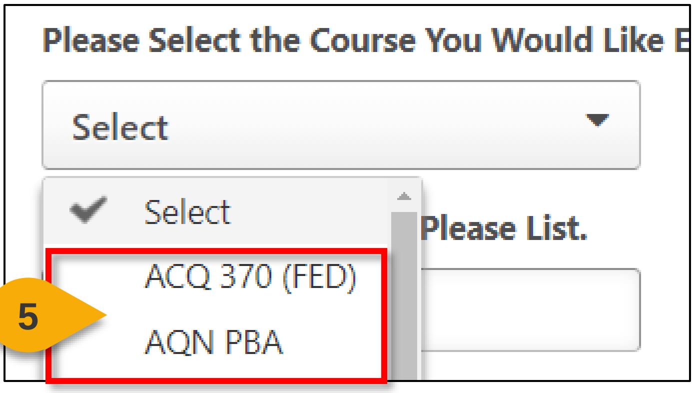


# Submit an Equivalency/Fulfillment Form (Cont.1)

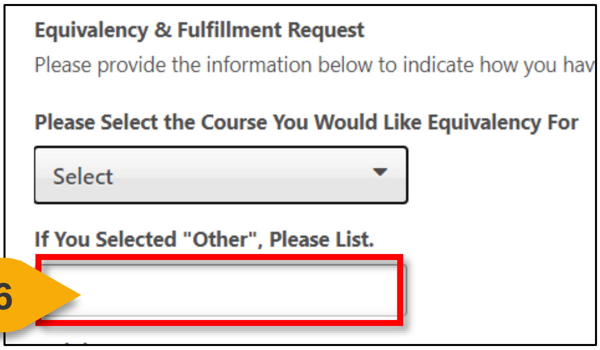
**Step 4**: Select the **dropdown arrow** to choose the course for which you would like an equivalency.




**Step 5**: Select the **course** from the dropdown menu.

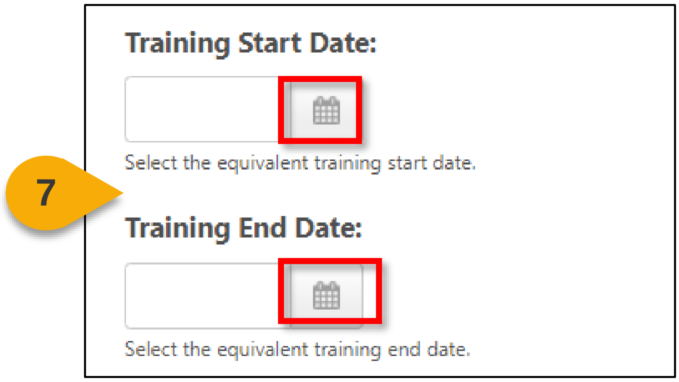



**Step 6**: If the course you are trying to request an equivalency for is not available, you can enter it in the **Other** textbox.

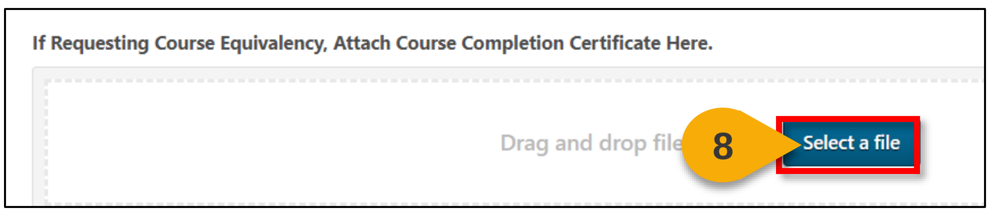


# Submit an Equivalency/Fulfillment Form (Cont.2)

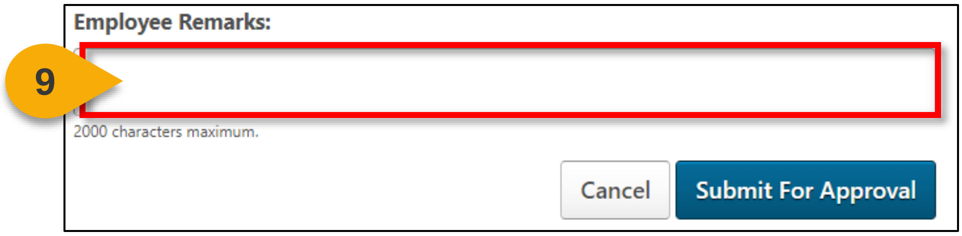
**Step 7:** Click the **calendar** icon to enter the Training Start and End dates.



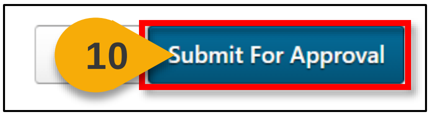

**Step 8**: Click **Select File** to add any supporting documentation.




**Step 9**: Enter any supporting comments in the **Employee Remarks** field.




**Step 10**: Click **Submit for Approval** to route to Equivalency and Fulfillment Approvers.



# Individual Development Plans

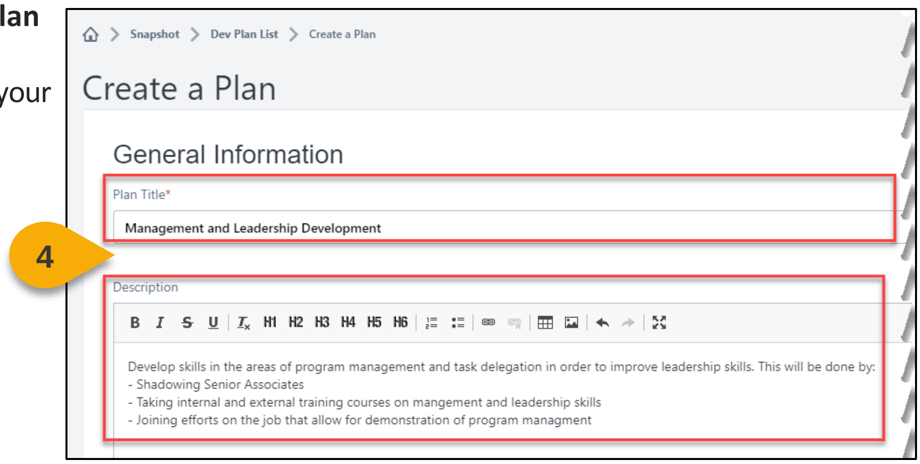
# Create an IDP

*When you want to create an IDP…*

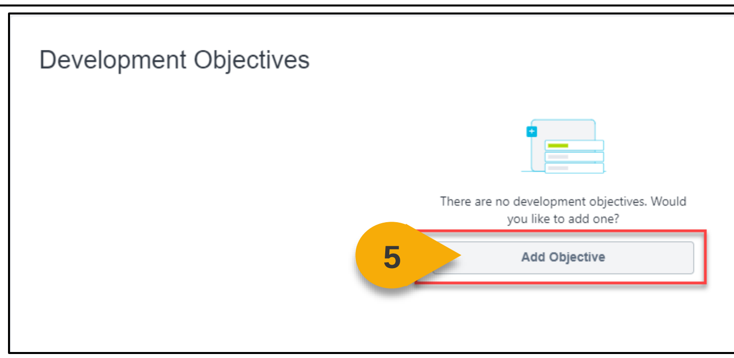
**Steps 1 & 2:** Hover over **Performance** and click on **Development Plans.**


**Step 3:** Click on the **Create New Plan button.**


**Step 4:** Add a **Plan Title** and **Description** to your IDP.

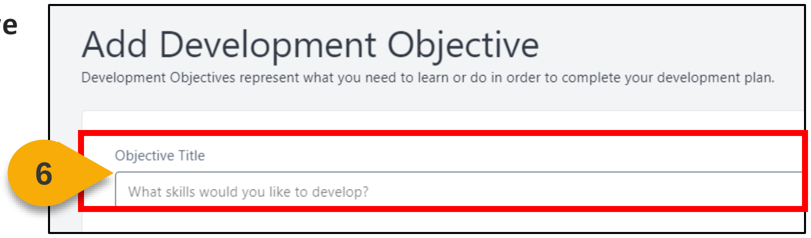



**Step 5:** Click on the **Add Objective button** in the Development Objectives section.



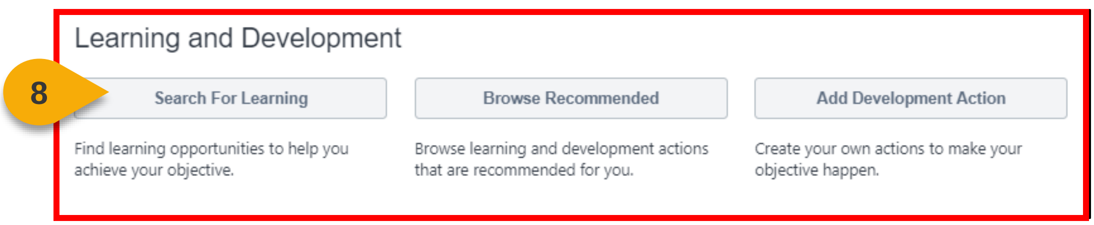
# Create an IDP (Cont. 1)

**Step 6:** Enter an **Objective Title**.




**Step 7:** Select a category from the **Category** dropdown.


**Step 8:** Add **Development Actions**. Under Learning and Development there are three options you can utilize to add training/development actions to your Objective: **Search for Training, Browse Recommended, and Add Development Action**.



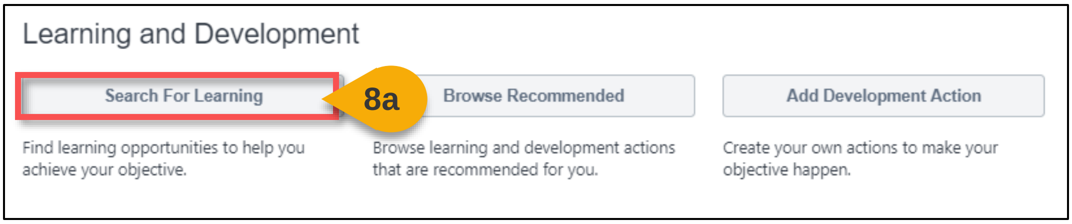

**Search for Learning:** Encompasses training sessions provided. It allows you to select online sessions.

**Browse Recommended:** Allows you to select learning and development courses.

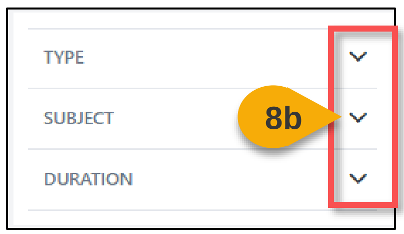
**Add Development Action:** Free text that allows you to add any external training or action item you wish to include in order to develop yourself professionally.

# Create an IDP (Cont. 2)

**Step 8a:** To add training courses available online in Cornerstone, click on **Search For Learning**.

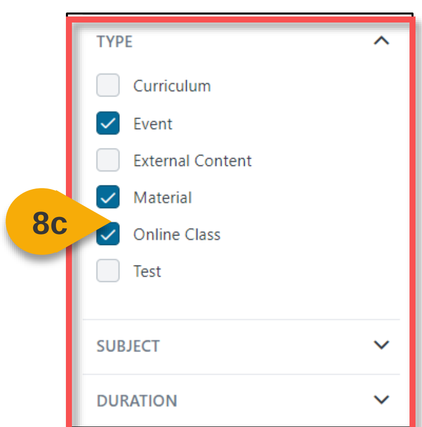



**Step 8b:** All the available courses will be displayed on the screen. To filter the results displayed, click on the **arrows next to the filter options** to the left of the page.




**Step 8c:** The filter options will expand on the screen. Select the filter you wish to apply by clicking on the **checkboxes** next to each option.

The results will be updated on the screen based on the filters you select.

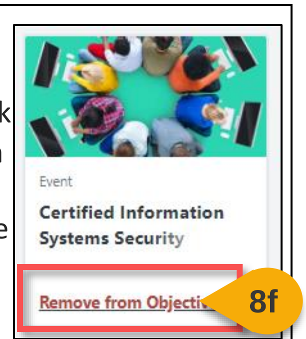


# Create an IDP (Cont. 3)

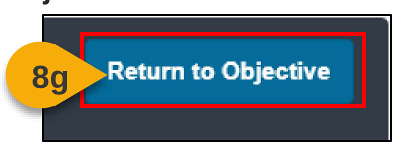
**Step 8d:** You may also search for a specific training course using the **Search bar**.


**Step 8e:** Select the **Add to Objective** link beneath any training you want to add. Multiple training courses can be selected.

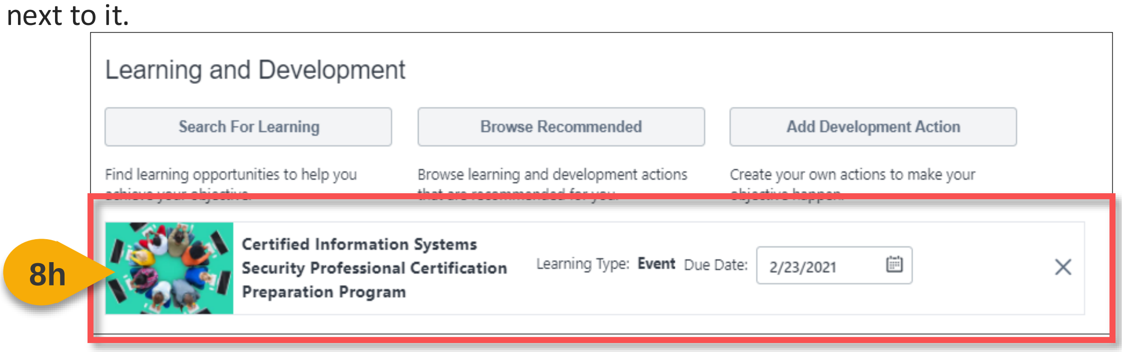

**Step 8f:** If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.




**Step 8g:** Once you are done selecting the training courses to be added to your Objective, click **Return to Objective** at the bottom of the page.

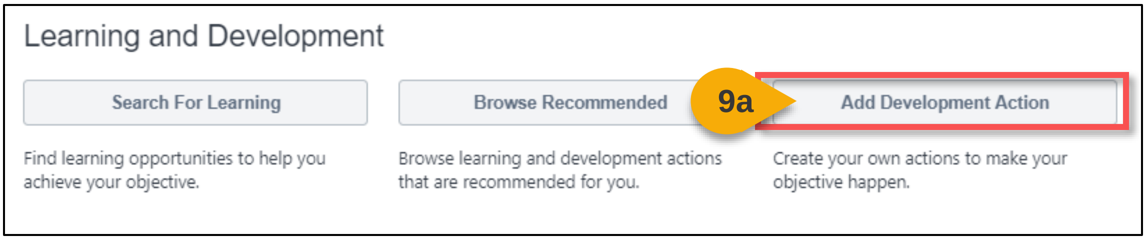



**Step 8h:** The course(s) selected will appear on the main **Objective** screen. By default, the training due date is set up to be due 6 months from now, but this date is editable. Notice that the training can be removed from your Objective by clicking on the **X icon** next to it.

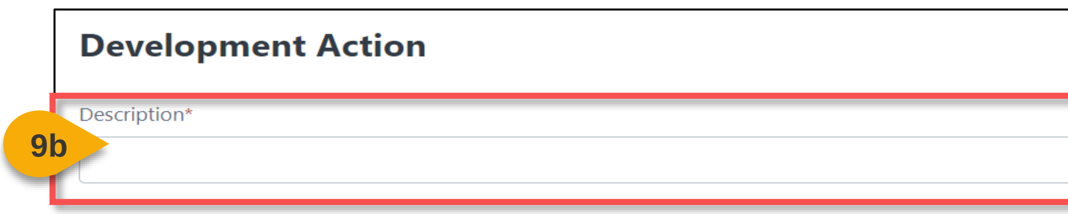


# Create an IDP (Cont. 4)

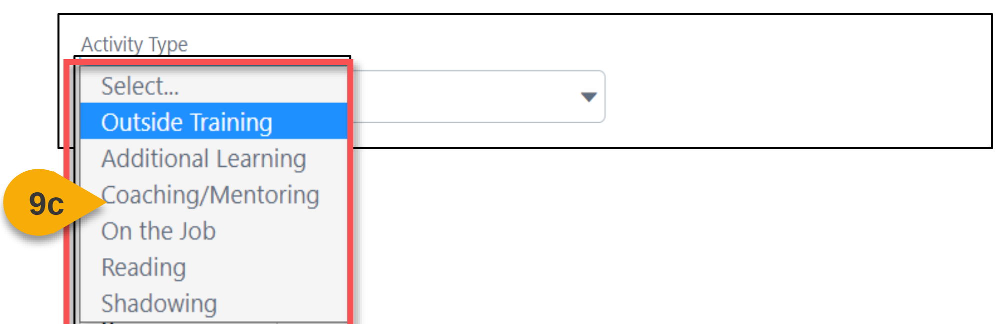
**Step 9a:** To add action items not in the CSOD catalog to your IDP Objective, click on **Add Development Action**.



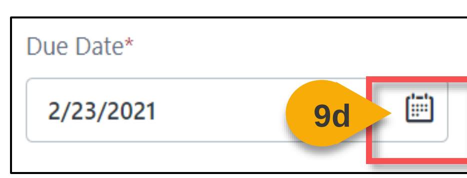

**Step 9b:** A pop-up window will appear on the screen. You must add at description to your development action in the **Description** field.




**Step 9c:** Select the **activity type** from the Activity Type dropdown menu.

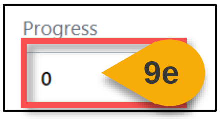



**Step 9d:** Confirm the due date for the development item. By default, the due date is set up to be due 6 months from when you first create this item. To change the due date, click on the **calendar icon** in the Due Date field, or simply type in the date.

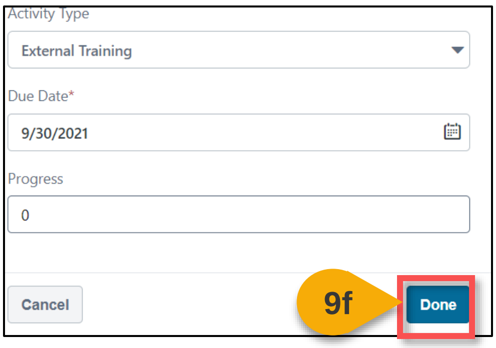


# Create an IDP (Cont. 5)

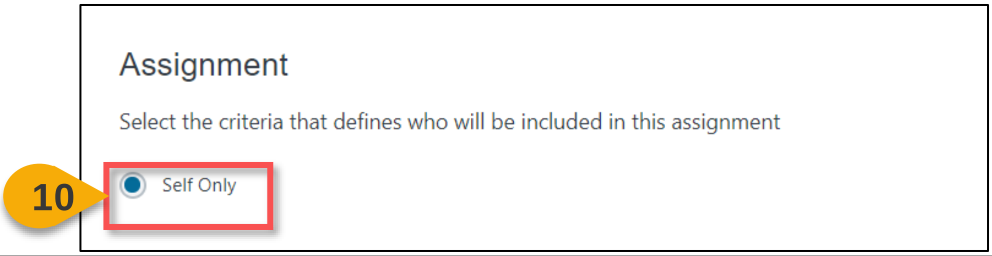
**Step 9e:** Update the **Progress** you have made as applicable. This is a percentage, but you don't need to type "%", just the number, e.g., for 25%, type in "25".



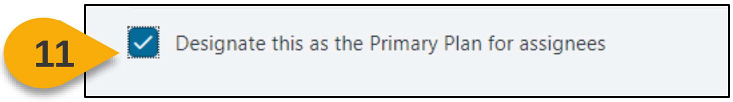

**Step 9f:** Click **Done** to add the activity to your IDP.




**Step 10:** Under Assignment, select **Self Only** to assign this IDP to yourself. If you are a Supervisor, you can assign this IDP to your employees. To assign IDPs to employees, view the Manager task aids.

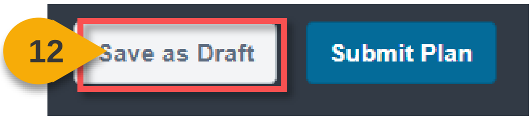



**Step 11:** To assign this IDP as your primary IDP (you can have multiple IDPs), check the box next to **Designate this as the Primary Plan for assignees**.

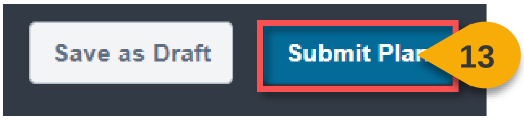


# Create an IDP (Cont. 6)

**Step 12:** To save the plan as a draft and return to it later, click **Save as Draft**.




**Step 13:** To submit the plan for Manager approval, click **Submit Plan**.




Primary IDPs should be utilized as the main formal development plan for the employee. However, if the Employee would like to have other secondary development plans, they can create more IDPs, which will be listed under Other Plans.

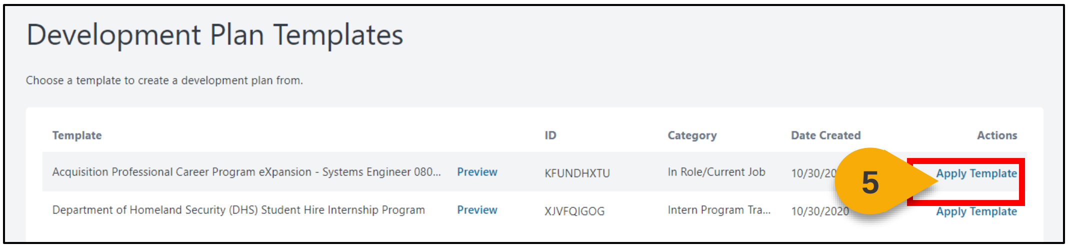
# Create an IDP from a Template

*When you want to create an IDP using a template…*

**Steps 1 & 2:** Hover over **Performance** and click on **Development Plans.**


**Steps 3 & 4:** Click on the **ellipsis** and then choose **Create Plan from Template.**

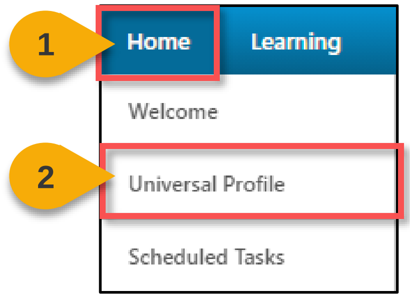

**Step 5:** Select the template you want to use and click **Apply Template.** You can edit the template or submit it for approval as-is.



# Update IDP

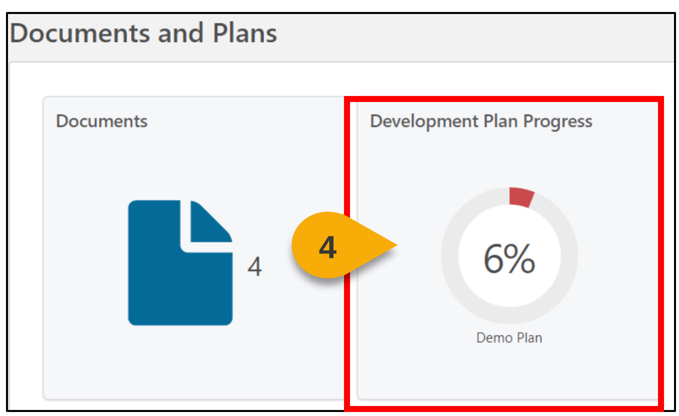
*When you want to update an IDP Objective, Training or Action Step…*

**Steps 1 & 2:** Hover over **Home** then navigate to **Universal Profile**.




**Step 3:** Click on the **Documents and Plans** tab.


**Step 4:** Click on the **Development Plan Progress** widget.

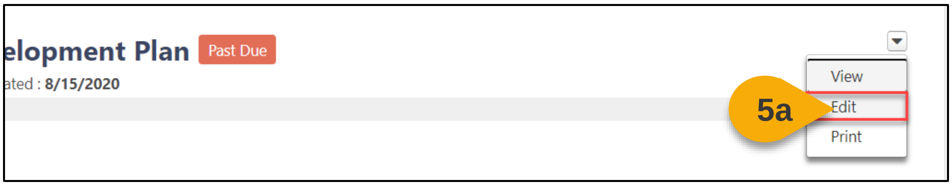



**Note:** You can also navigate to the IDP using the Performance tab and then clicking on Development Plans.

# Update IDP (Cont. 1)

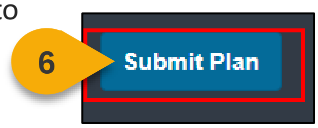
If you wish to add a new Objective to your IDP, follow steps 5a – 5b below.

**Step 5a:** Select the dropdown icon **Edit** option next to the IDP to which you want to add a new Objective.




**Step 5b:** Click on the **Add Objective button** and create the new Objective (see Creating IDPs task aid for further assistance).

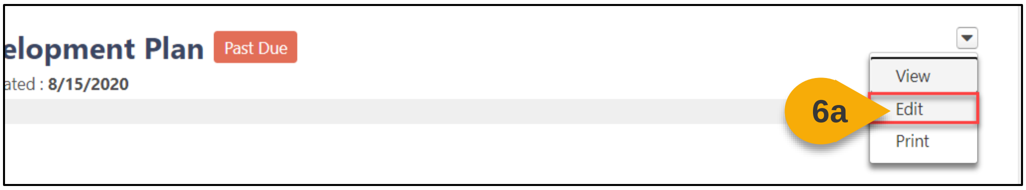

**Step 6:** Click on the **Submit Plan** button when you are ready to resubmit your plan for approval.



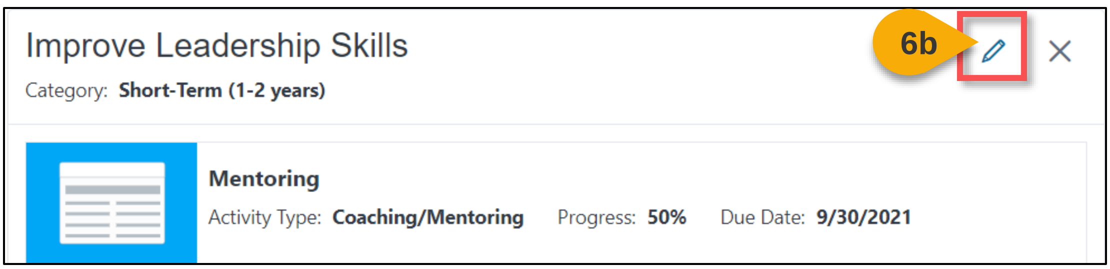
# Update IDP (Cont. 2)

If you only wish to update a Training or Action Step on an Objective in your IDP, follow the steps 6a – 6g on the following pages.

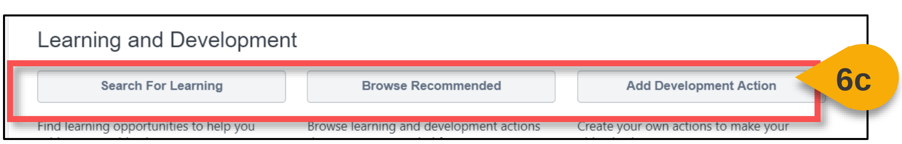
**Step 6a:** Select the dropdown icon **Edit** option next to the plan with the Objective you want to update.




**Step 6b:** Select the **Edit** icon next to the Objective for which you want to update Training or Actions Items.

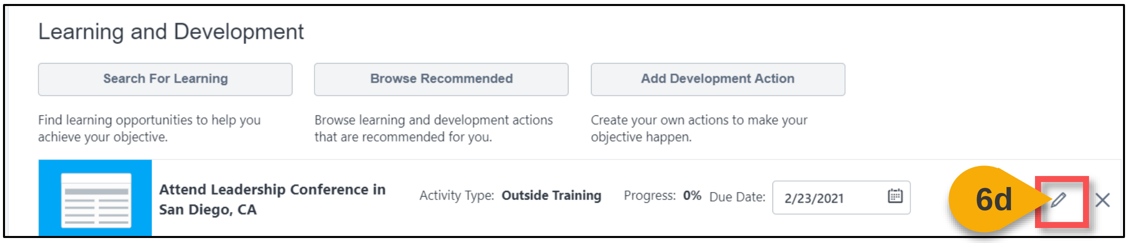



**Step 6c:** To add training or Development Actions, choose from the options within **Learning and Development.**

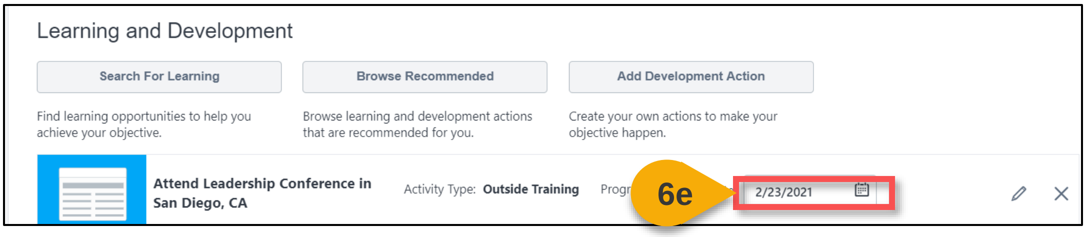


# Update IDP (Cont. 3)

**Step 6d:** You can edit Development Actions by clicking on the **Edit** icon next to it. When in editing mode, you can update anything in the Development Action, including its progress. You can only cancel IDPs after they've been approved.

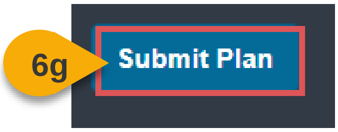



**Step 6e:** For training courses that are NOT Development Actions, you may update the due date by clicking on the **Due Date field** or delete it by clicking on the **X icon** next to it. Training course completions will be updated automatically as you complete these training courses on your transcript.




**Step 6f:** Once all the changes have been made to your IDP's Objective, click on the **Save and Return to Plan.**


**Step 6g** When ready, click **Submit Plan** to resubmit the IDP for approval.

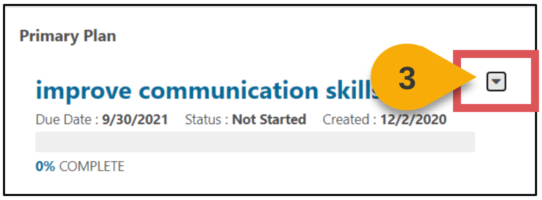


# Cancel IDP

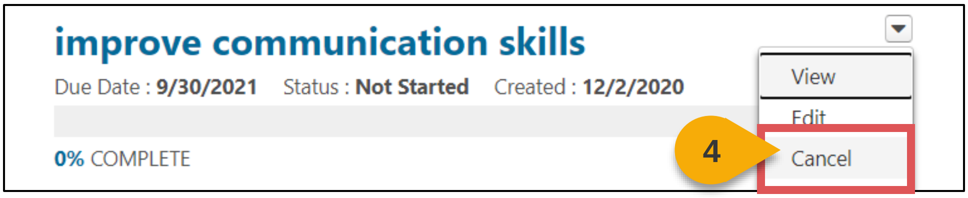
*When you want to cancel an IDP…*

**Steps 1 & 2**: Hover over the **Performance** tab and then click **Development Plans**.

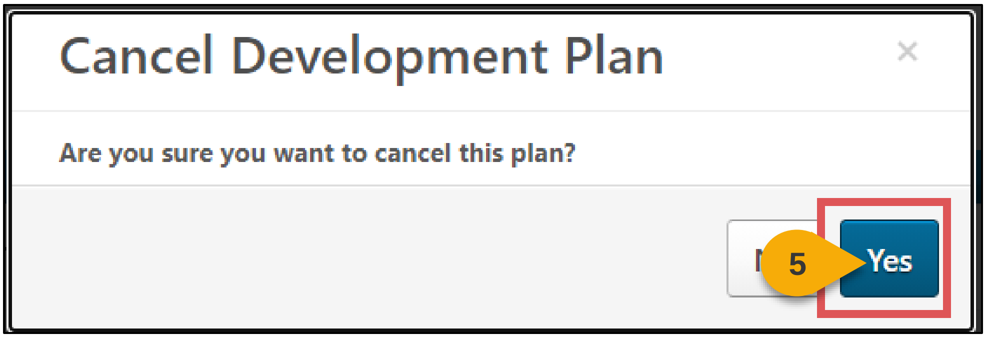

**Step 3:** Click the **dropdown arrow** next to the plan you would like to cancel.



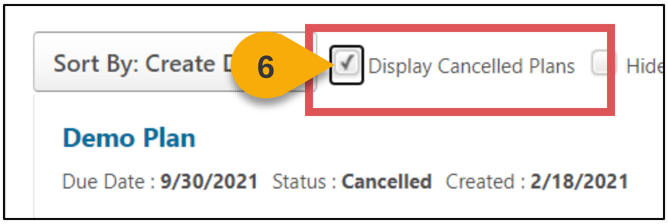

**Step 4:** Select **Cancel** from the dropdown menu.




**Step 5**: A popup will appear. Select **Yes** to cancel the IDP.




**Step 6**: Click the **checkbox** for Display Cancelled Plans to view the IDP you cancelled.

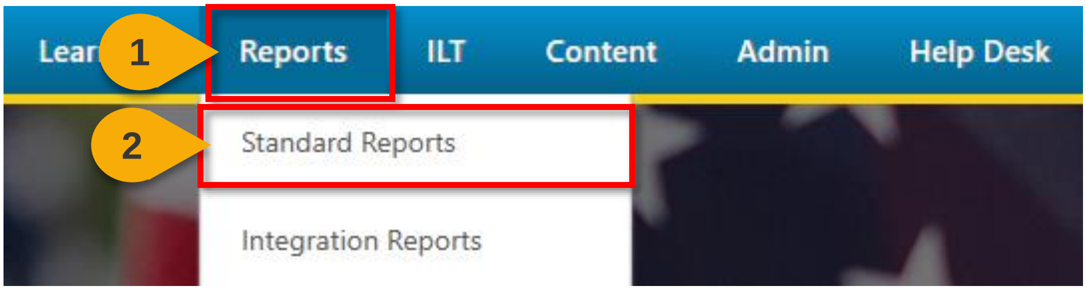


# Reports

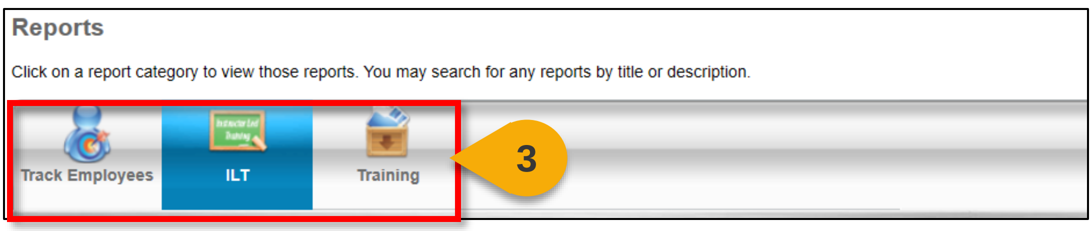
# View Standard Reports

*When you want to view Standard Reports…*

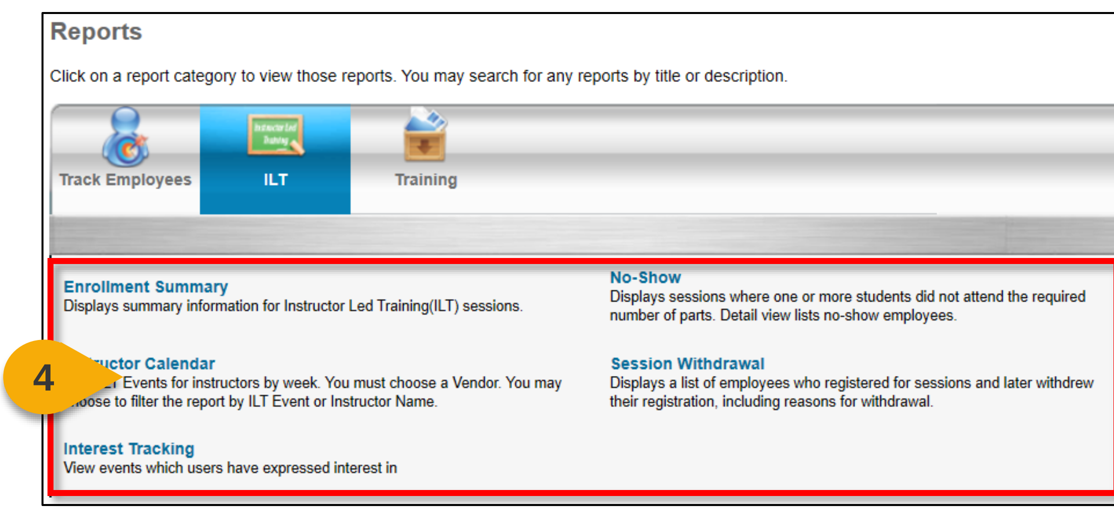
**Steps 1 & 2**: Hover over the Reports tab and then click Standard Reports.




**Step 3:** Choose the Report Category.

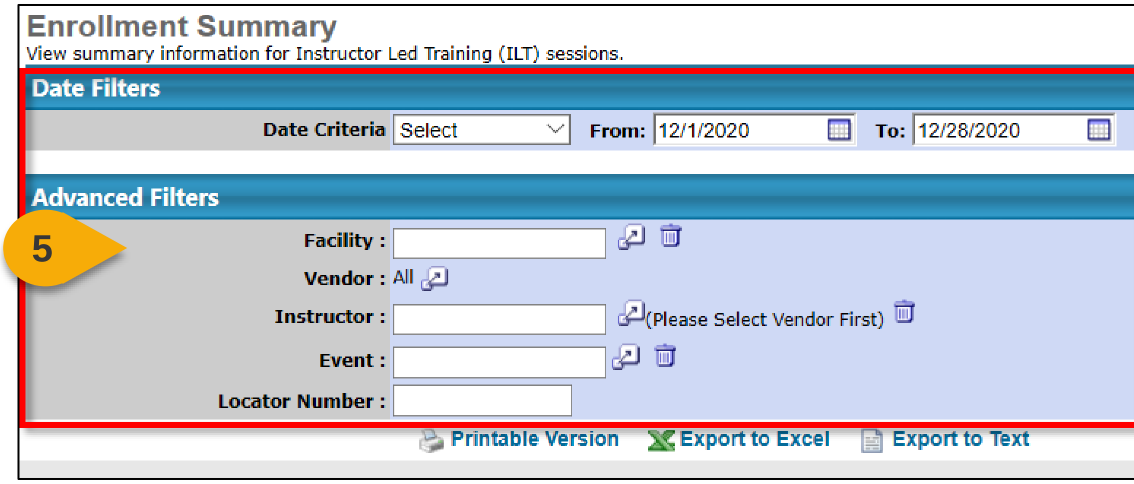



**Step 4:** Select the type of report you would like to view by clicking on the **name of the report**.

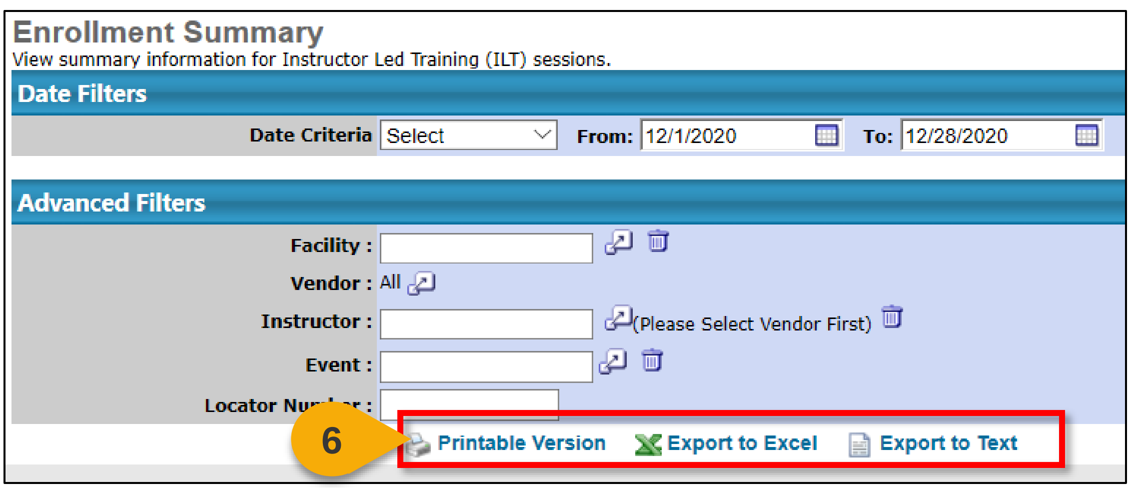


# View Standard Reports (Cont.1)

**Step 5:** Enter data into the filters you would like to apply to the report. The filters available will vary depending on the report selected. The system will alert you if you try to run a Standard Report with required fields missing.




**Step 6:** Choose how you would like the report to export: Printable Version, Export to Excel, or (when available), Export to Text. The file will download to your computer.

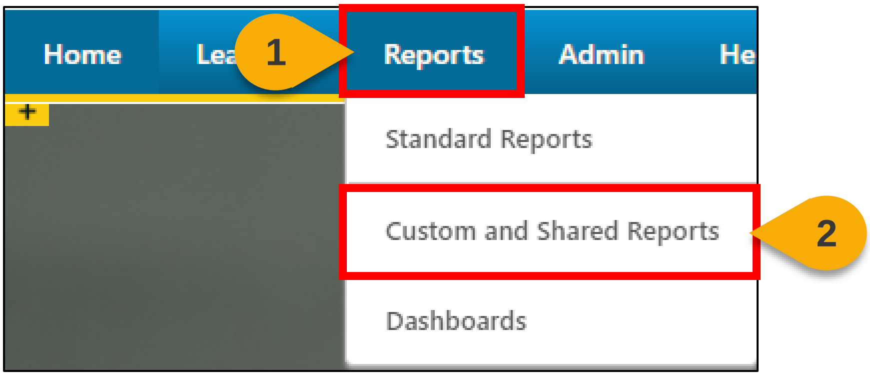



Note: Click “Yes” to open the Excel option after the download has completed.

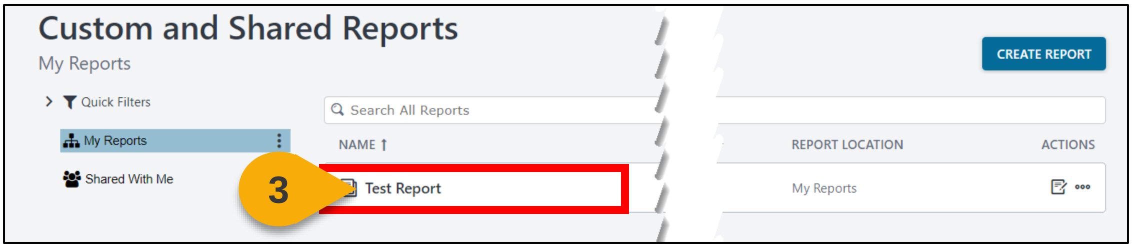
# View Custom Reports

*When you want view custom or shared reports…*

**Steps 1 & 2**: Navigate to **Reports,** then select **Custom and Shared Reports.**

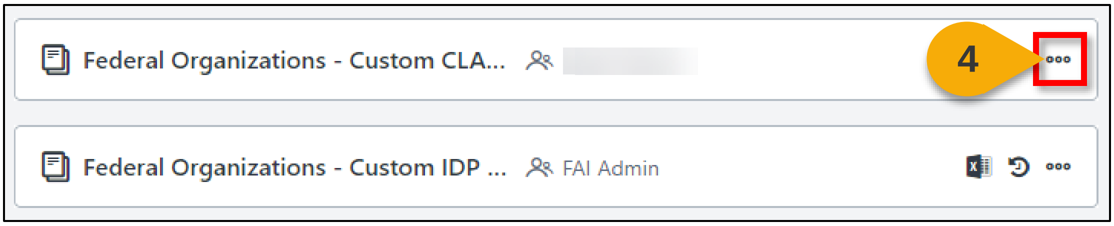



**Step 3:** You will arrive at the Custom and Shared Reports page. Here you will see all custom reports that you have created. Click on the **title** of the report to view it.

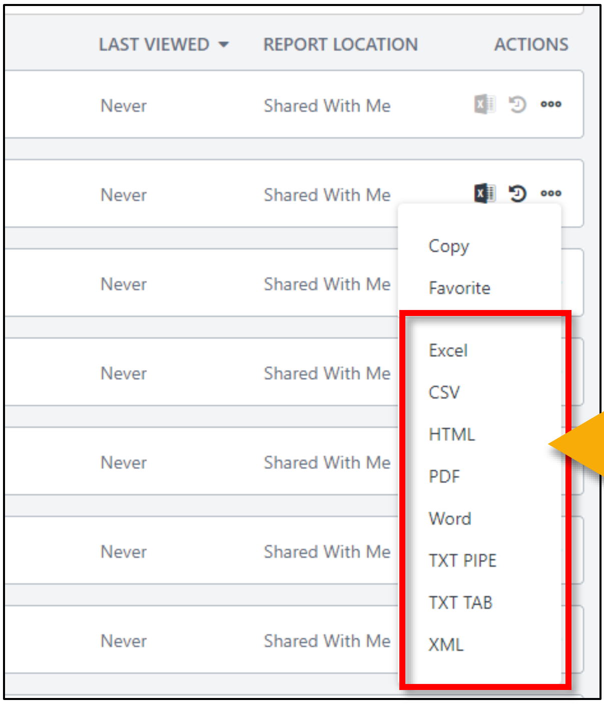


# View Custom Reports (Cont.1)

**Step 4: To see other report format options, click the ellipses (...) icon.**



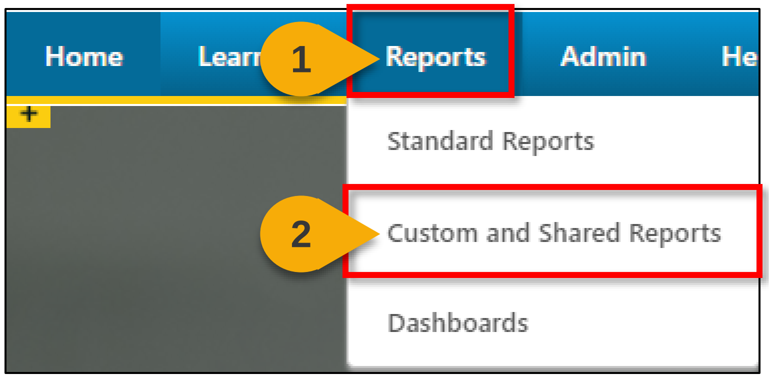

**Step 5:** Click the **file format** you wish to download. It will download to your computer.



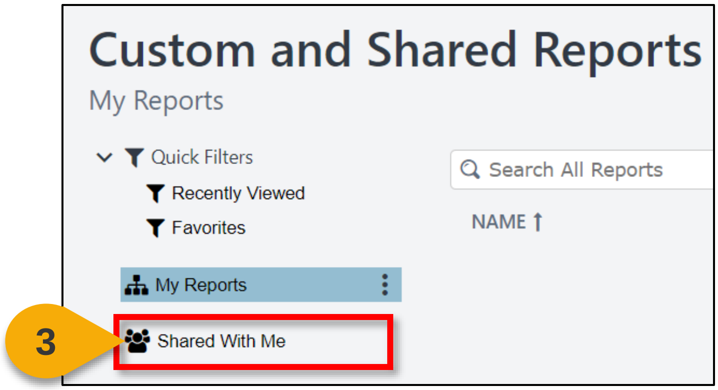
# Filter and Download Custom Reports

*When you want to filter and download a report…*

**Steps 1 & 2: Navigate to the Reports tab and then select Custom and Shared Reports.**



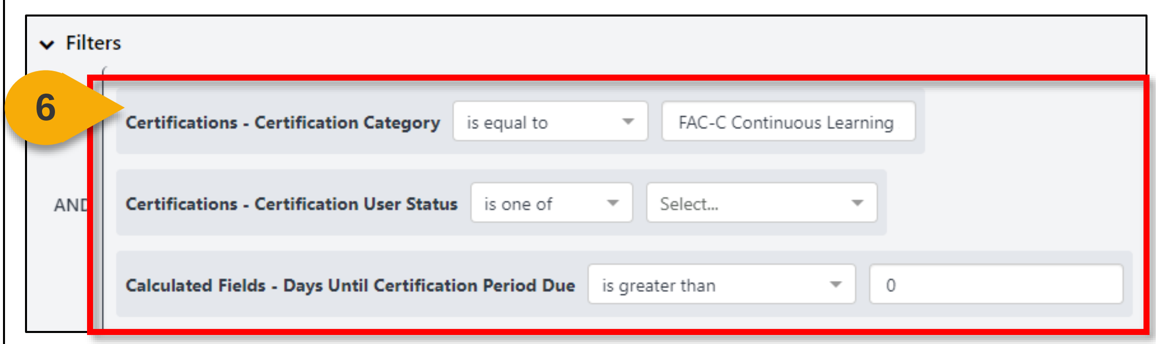

**Step 3:** On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you.



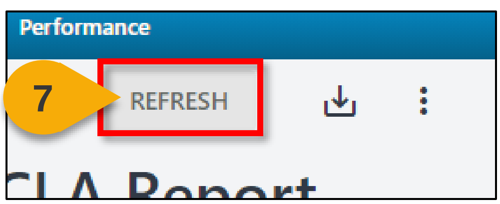

**Step 4:** Click the **Report Name** you want to view to update the report filters.

# Filter and Download Custom Reports (Cont. 1)

**Step 5: Update the filters as needed. The filters will vary based on the report.**




**Step 7:** Click **Refresh** in the top right corner to see a sample of the newly-filtered report on the bottom portion of the page.




**Step 8:** Click the **Download Options icon** in the top right corner to see the formats available for this report.


**Step 9:** Choose the **File Format** in which you would like to download the report. The report will download to your computer.