



# Certification Owner Task Aid

## Task Aid Titles

- Log On
- Forgot Password
- Request an Account with the SAAR Form
- View User Record
- Edit User Record
- Edit User Record via Advanced Form
- View Transcript
- View Transcript Status
- Search for a User
- View User's Transcript
- Approve or Deny External Training Request
- Request External Training Credit Within a Certification
- Request External Training Credit from Transcript
- Add External Training to a Certification
- Register for Online Training (OLT)
- Submit an Exception Request
- Register for Instructor-Led Training (ILT)
- Indicate Interest in a Future Session
- Withdraw from an ILT
- Remove Training from Transcript Using Training Removal Tool
- Remove Training from Transcript
- View Certification Information
- Create Certifications
- Edit a Certification
- Request and Manage a Certification
- Revoke a Certification
- Put a Certification on Hold
- Approve or Deny External Training Request
- View and Edit Checklists
- View Submitted Forms
- Request Education/Experience Verification
- Submit an Equivalency/Fulfillment Form
- Create an IDP
- Create an IDP from a Template
- Update IDP
- Cancel IDP
- View Standard Reports
- View Custom Reports
- Filter and Download Custom and Reports

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



<https://www.fai.gov/>



[FAI@mail.mil](mailto: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> (do not use the Internet Explorer browser). You may want to log out of VPN before starting this process.

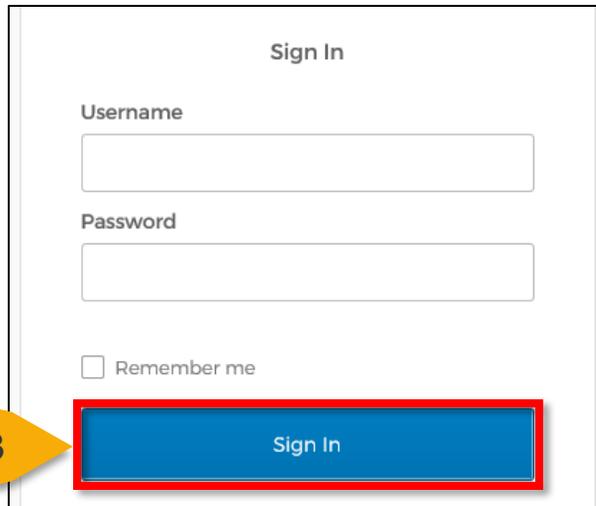


**Step 2:** The login window will pop up. Enter your **Username** (your email) and **Password** in their respective fields.

A screenshot of the DAU Sign In page. The page features the DAU logo at the top, a user icon, and the text "Sign In". Below this, there are two input fields: "Username" and "Password". A red rectangular box highlights both the Username and Password fields. A yellow callout bubble with the number "2" inside points to the Username field. Below the input fields, there is a checkbox labeled "Remember me". At the bottom of the form, there is a blue "Sign In" button, an "OR" separator, and a "Sign in with CAC Card" button. At the very bottom, there is a link that says "Need help signing in?".

# Log On (Cont.1)

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



Sign In

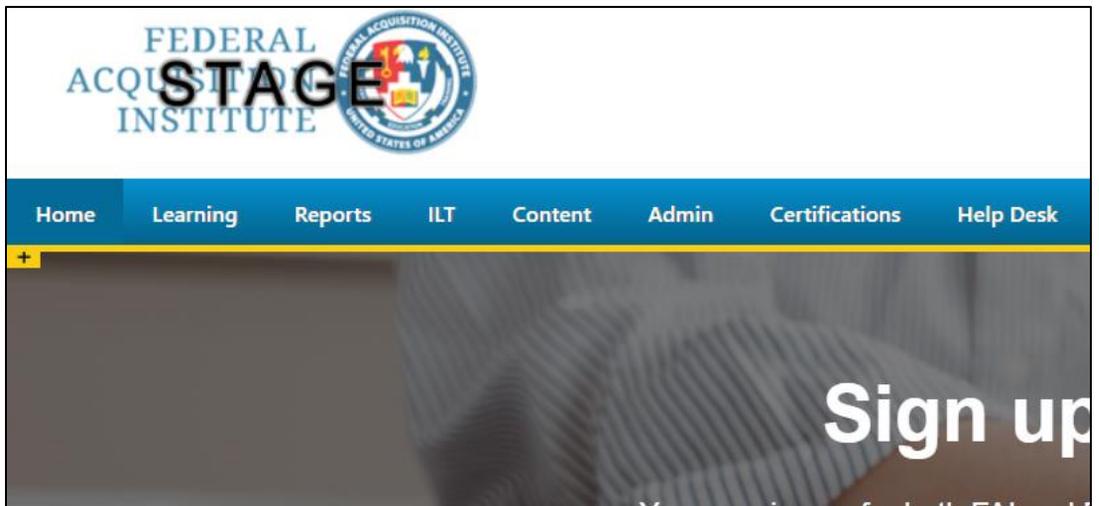
Username

Password

Remember me

**3**

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



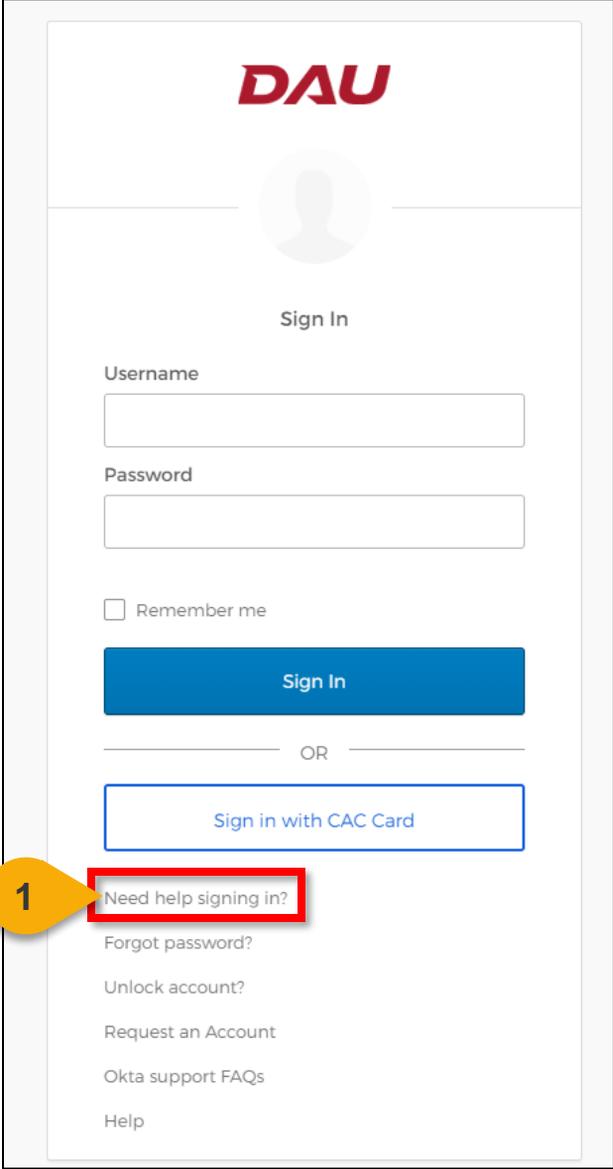
**NOTE:** If you receive an error message:

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

# 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.



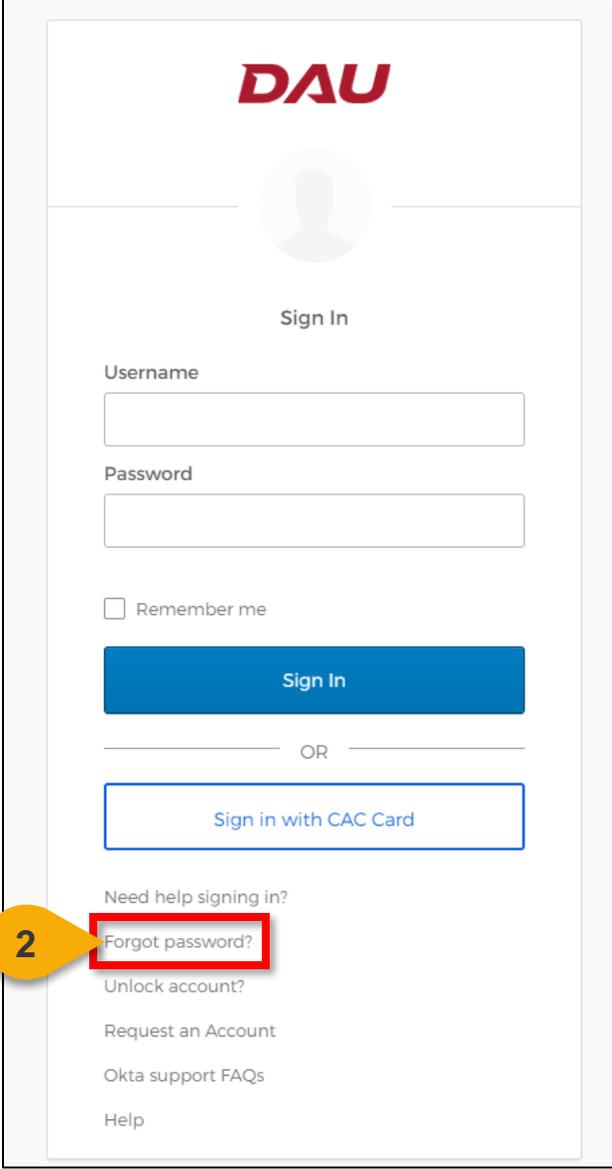
The image shows a screenshot of the DAU (Department of Acquisition) Sign In page. At the top, the DAU logo is displayed in red. Below the logo is a placeholder for a user profile picture. The page is titled "Sign In" and contains the following elements:

- A "Username" input field.
- A "Password" input field.
- A checkbox labeled "Remember me".
- A blue "Sign In" button.
- An "OR" separator.
- A blue "Sign in with CAC Card" button.
- A list of links at the bottom: "Need help signing in?", "Forgot password?", "Unlock account?", "Request an Account", "Okta support FAQs", and "Help".

A yellow callout bubble with the number "1" points to the "Need help signing in?" link, which is highlighted with a red rectangular box.

# 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.



**DAU**

Sign In

Username

Password

Remember me

Sign In

OR

Sign in with CAC Card

Need help signing in?

**Forgot password?**

Unlock account?

Request an Account

Okta support FAQs

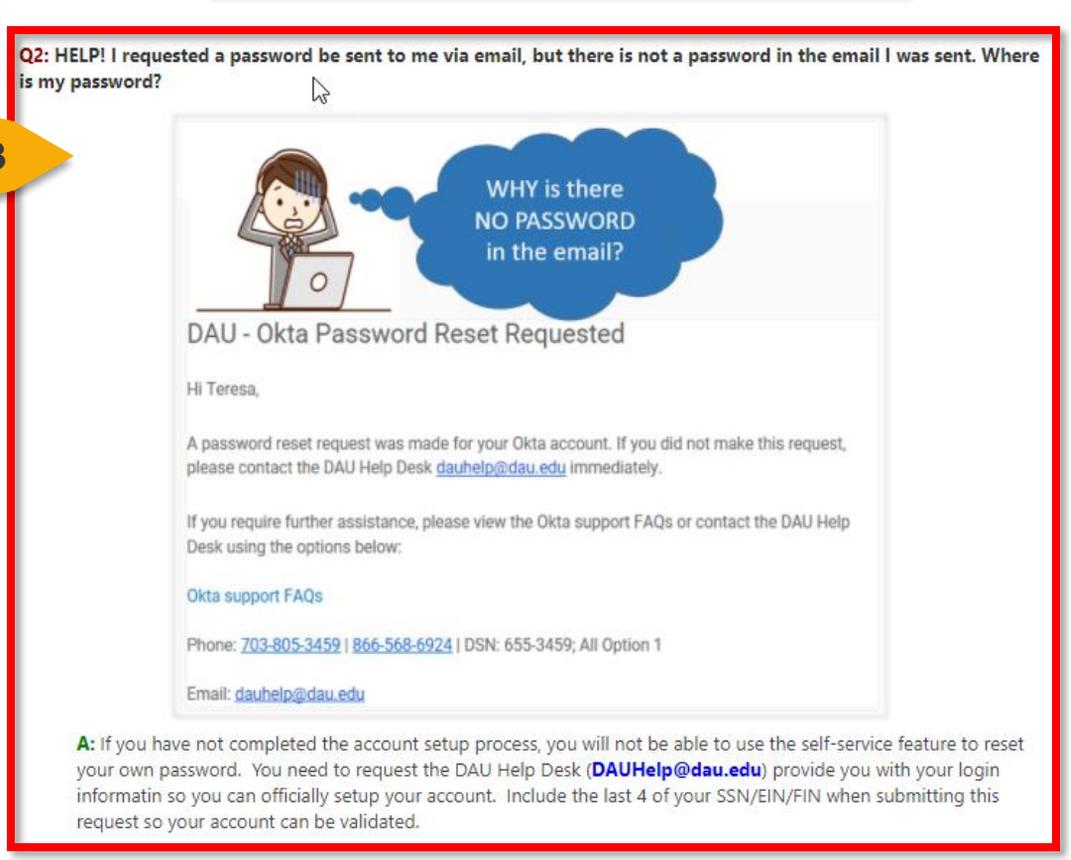
Help

# Forgot Password (Cont.2)

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

**3**

**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?**



WHY is there NO PASSWORD in the email?

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 [dauhhelp@dau.edu](mailto:dauhhelp@dau.edu) immediately.

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

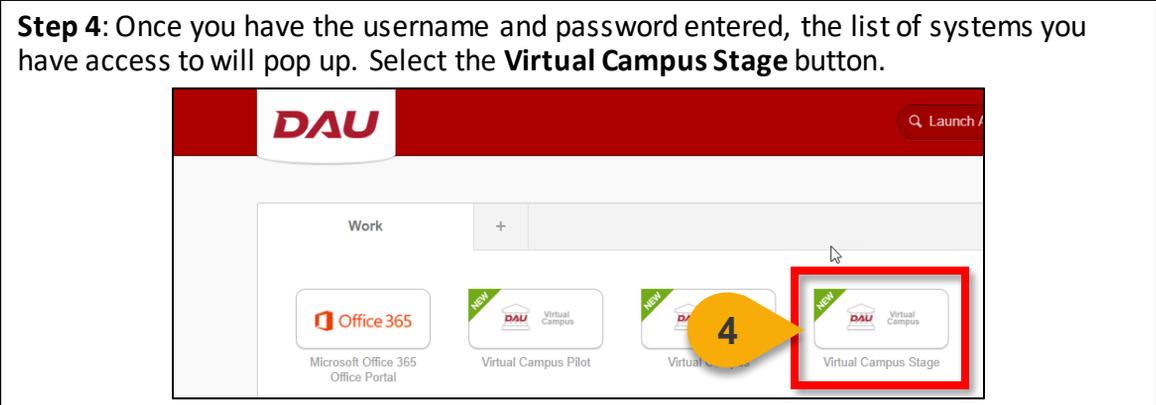
[Okta support FAQs](#)

Phone: [703-805-3459](tel:703-805-3459) | [866-568-6924](tel:866-568-6924) | DSN: 655-3459; All Option 1

Email: [dauhhelp@dau.edu](mailto:dauhhelp@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](mailto: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.



DAU

Launch /

Work +

Office 365  
Microsoft Office 365  
Office Portal

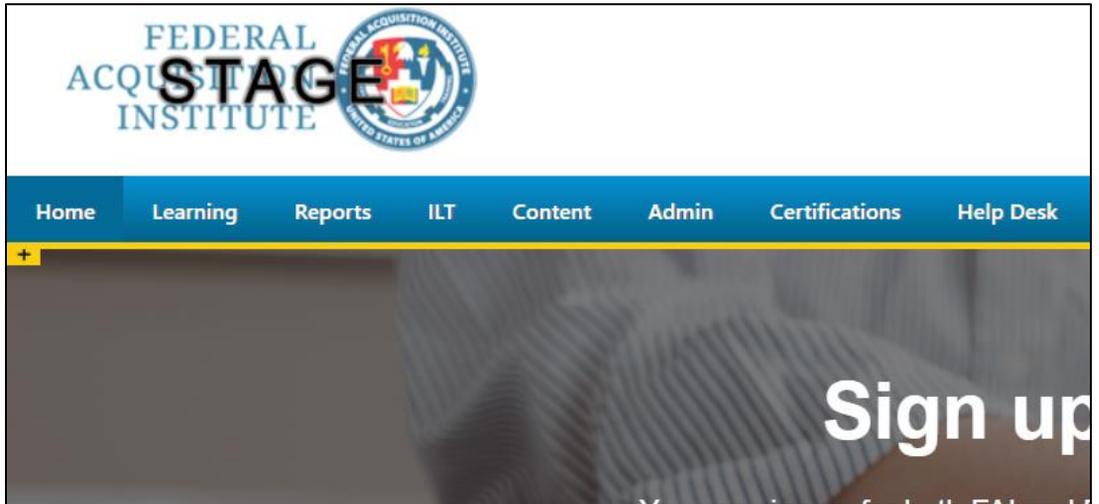
Virtual Campus Pilot

Virtual Campus Stage

**4**

# 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".

**DoD Warning Banner**

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests--not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential.

1 OK

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

*System Authorization Access Request (SAAR)*

**+** AGENCY DISCLOSURE NOTICE & PRIVACY STATEMENTS  
(Click + at left to view)

**▾** DoD Common Access Card (CAC) ASSOCIATION

**\*\*IMPORTANT - PLEASE READ\*\***  
The **REQUIRED** browser to submit this form is Google Chrome or Microsoft Edge.

Do you support the Department of Defense and have a Common Access Card (CAC)?  Yes  No \*

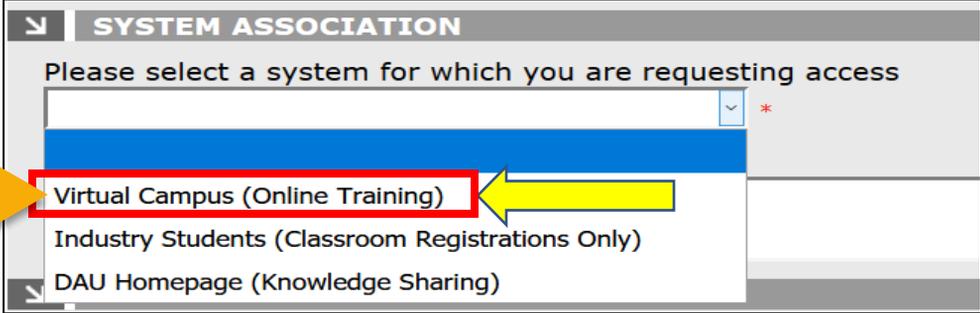
Do you know your DAUID?  Yes  No \*

2

**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.

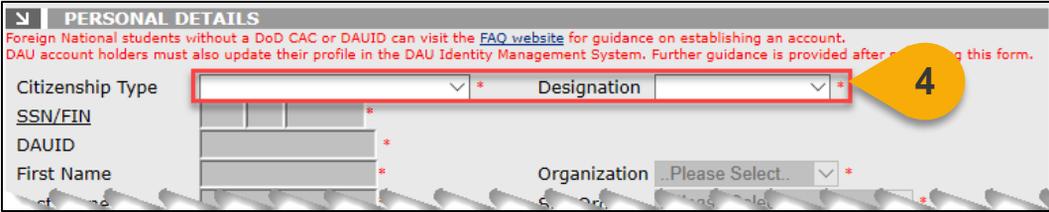
# Request an Account Using the SAAR Form (Cont.1)

**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.



The screenshot shows a dropdown menu titled "SYSTEM ASSOCIATION" with the instruction "Please select a system for which you are requesting access". The menu is open, showing three options: "Virtual Campus (Online Training)", "Industry Students (Classroom Registrations Only)", and "DAU Homepage (Knowledge Sharing)". A yellow callout bubble with the number "3" and a yellow arrow points to the "Virtual Campus (Online Training)" option, which is also highlighted with a red box.

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



The screenshot shows the "PERSONAL DETAILS" section of the form. A red box highlights the "Citizenship Type" and "Designation" dropdown menus. A yellow callout bubble with the number "4" points to the "Designation" field. Other fields like "SSN/FIN", "DAUID", "First Name", and "Organization" are grayed out. A red asterisk is visible next to the "Designation" field.

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



The screenshot shows the "SUPERVISOR DETAILS" section of the form. A red box highlights the "First Name", "Last Name", "Supervisor Email", and "Supervisor Phone" input fields. A yellow callout bubble with the number "5" points to the "Supervisor Phone" field. Red asterisks are visible next to each of these four fields.

# 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 the access is no longer required.

**I Agree**

6

Type the code from the ir

The code is not case sensitive.

7

SUBMIT

[Contact Us](#) | [Suggestion Box](#)

DAU Help Desk [703-805-3459](tel:703-805-3459) | [1-866-568-6924](tel: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.

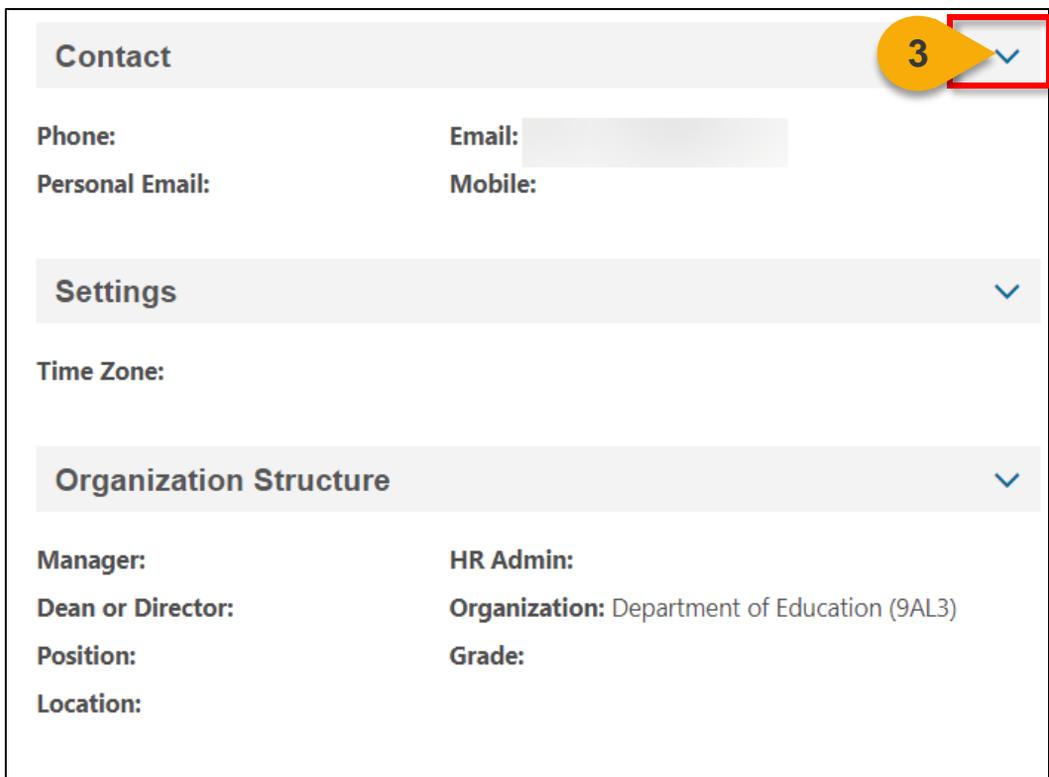
# View User Record

*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.



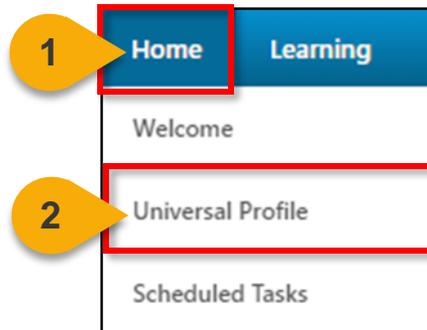
**Step 3:** To expand a section, click on the arrow to the right of that section.



# 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.**

To help FAI accurately report training data, it is important that the data you enter on this page is correct.  
Click the **Edit** button at the bottom of this page to edit fields.

Name: FAI Employee      User Name: FAI\_Employee  
User ID: FAI\_Employee  
Original Hire Date:  
Active Status: Active



**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**

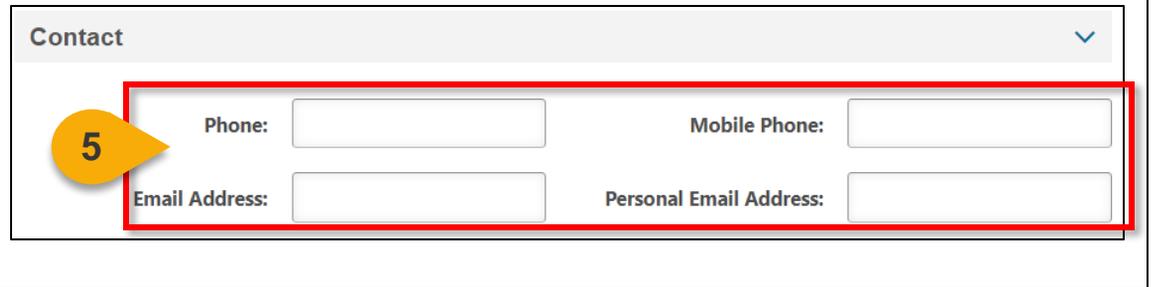
4

First Name: *	<input type="text" value="FAI"/>
Middle Name:	<input type="text"/>
Last Name: *	<input type="text" value="Employee"/>
User Name: *	<input type="text" value="FAI_Employee"/>

The form fields for First Name, Middle Name, Last Name, and User Name are highlighted with a red box. A yellow callout bubble with the number '4' points to the first input field.

# 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.**



Contact

5

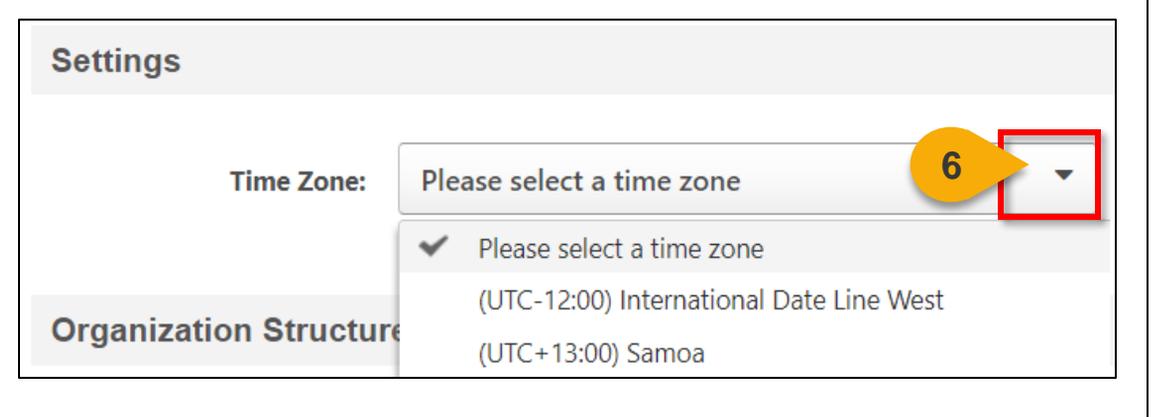
Phone:

Mobile Phone:

Email Address:

Personal Email Address:

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



Settings

Time Zone: Please select a time zone

6

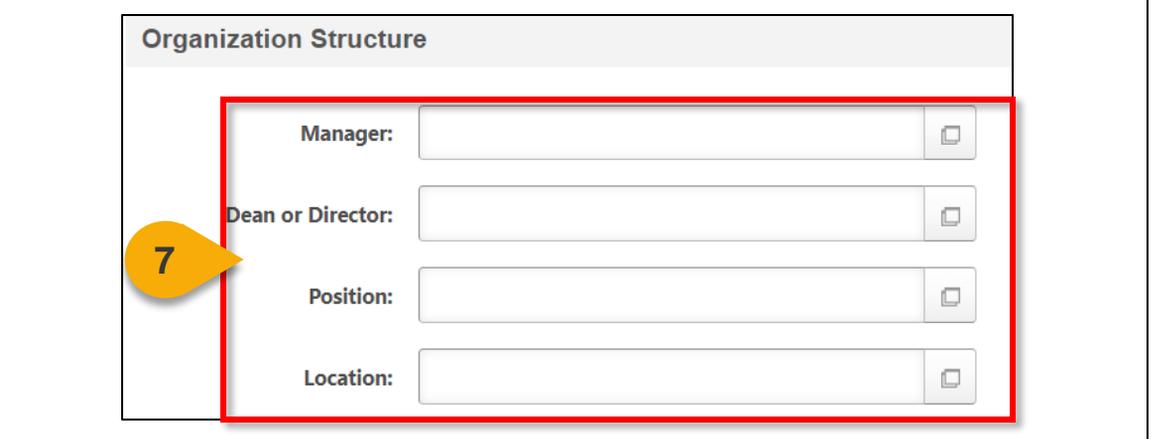
✓ Please select a time zone

(UTC-12:00) International Date Line West

(UTC+13:00) Samoa

Organization Structure

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



Organization Structure

7

Manager:

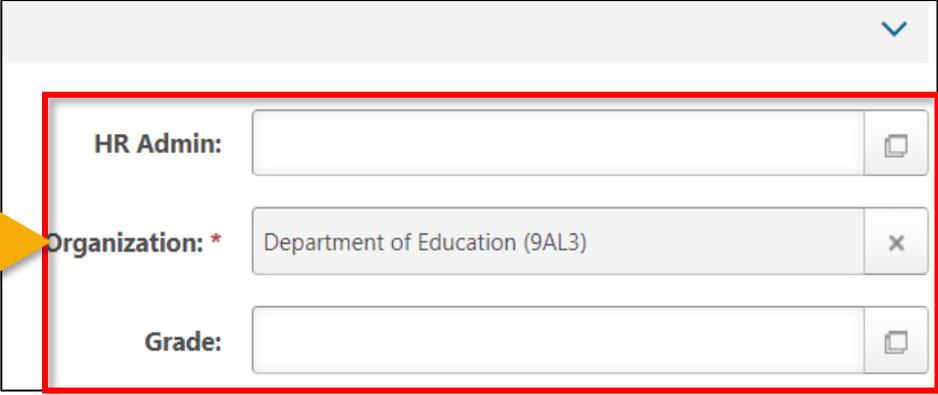
Dean or Director:

Position:

Location:

# Edit User Record (Cont.2)

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

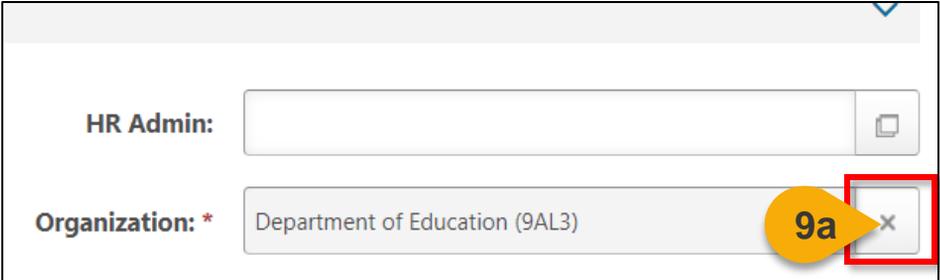


HR Admin:

**8** Organization: \* Department of Education (9AL3)

Grade:

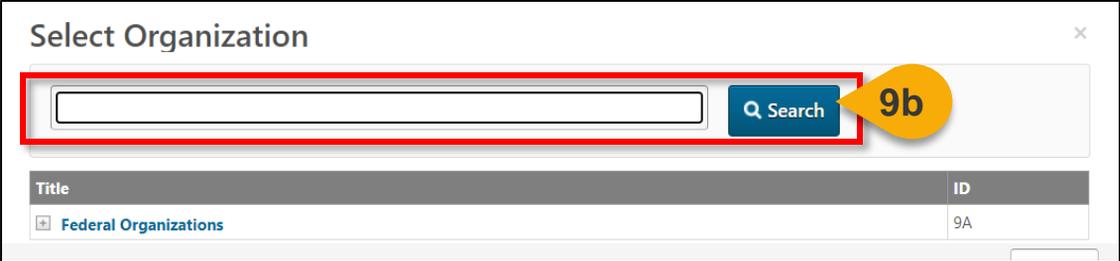
**Step 9a:** To search for your organization, Click on the box next to Organization. A popout box will appear.



HR Admin:

Organization: \* Department of Education (9AL3)

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



Select Organization

Title	ID
<input type="checkbox"/> Federal Organizations	9A

# Edit User Record (Cont.3)

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

Title	ID
Federal Organizations	9A

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

All • Federal Organizations

Title	ID
ATRRS Federal Orgs	AFO
Department of Agriculture	9ALA
Department of Commerce	9ALB
Department of Education	9AL3

**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.

Other Demographics

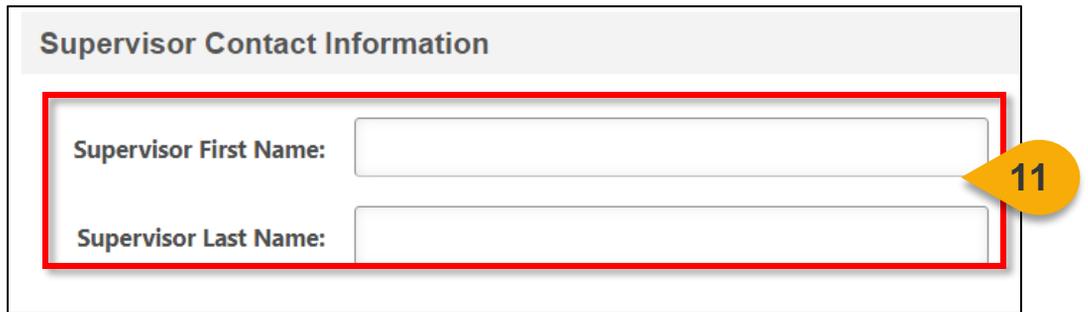
Work City:

Work Zip Code:

Disability:

# 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.

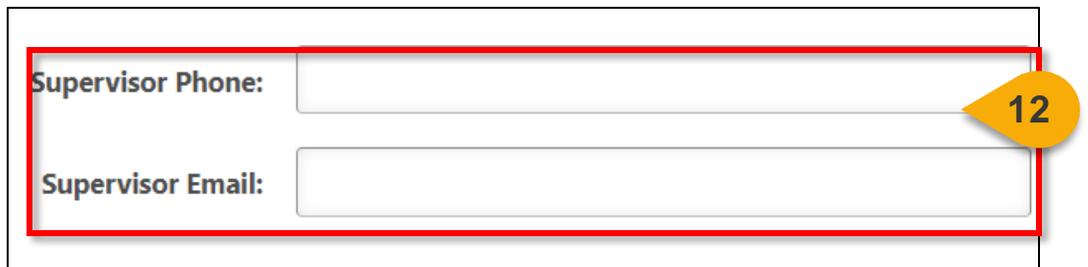


Supervisor Contact Information

Supervisor First Name:

Supervisor Last Name:

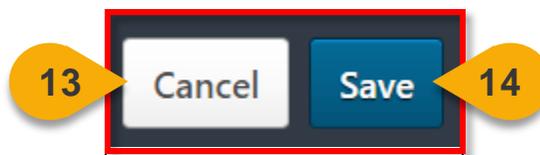
**Step 12:** In the Supervisor Contact Information section, you can also enter your Supervisor's Phone and Email.



Supervisor Phone:

Supervisor Email:

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

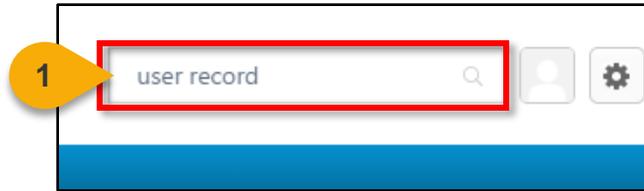


13 Cancel 14 Save

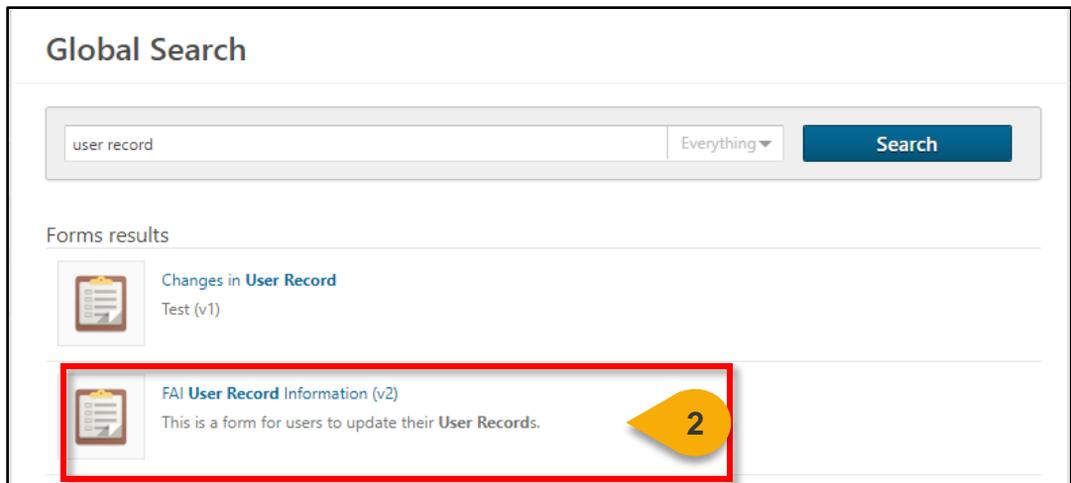
# Edit User Record via Advanced Forms

*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.

## FAI User Record Information (v2)

This is a form for users to update their User Records.

All fields marked with an asterisk are required.

**First Name \***

**Middle Name**

**Last Name \***

**Suffix**

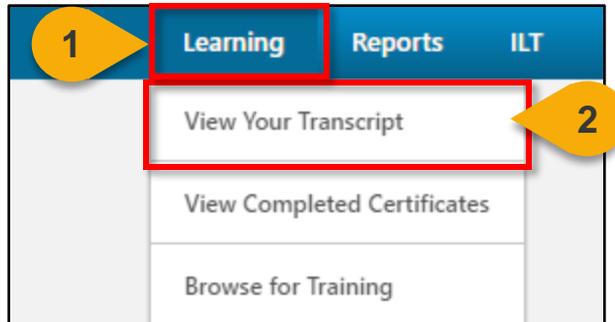
Local System ID

Cancel **Submit**

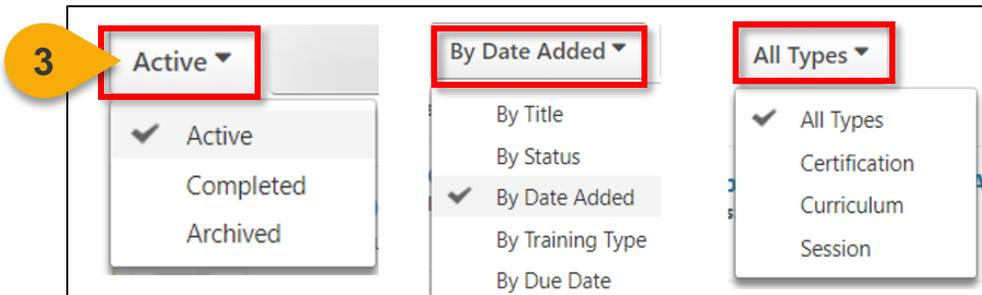
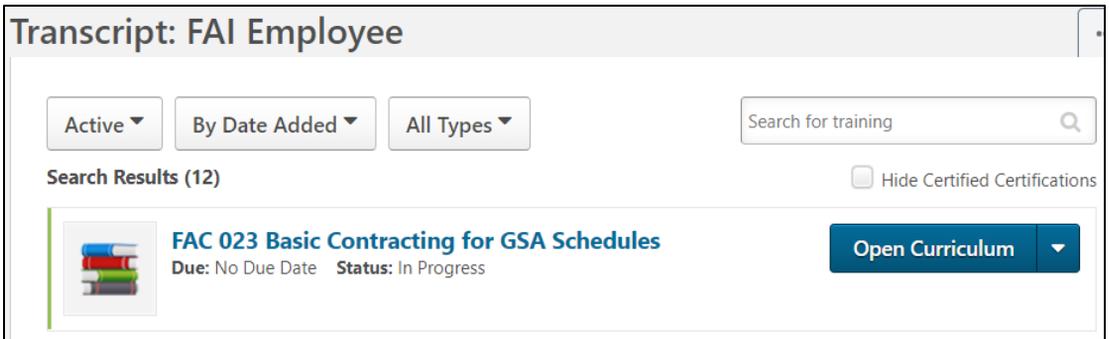
# View Transcript

*When you want to view your Transcript...*

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



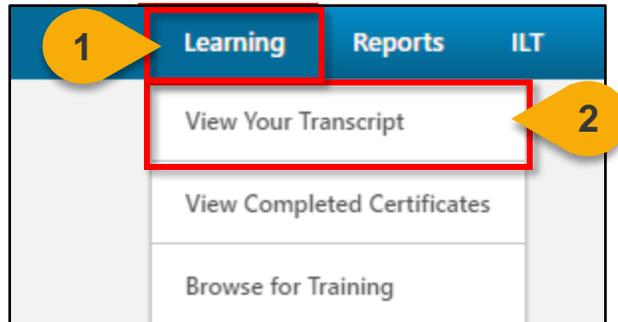
**Step 3:** You will be taken to your Transcript. You can click the dropdown arrow filter to show Active, Completed, and Archived courses. By default, only active courses you have not completed will be listed. Click on the arrows by each filter for dropdowns to sort the courses.



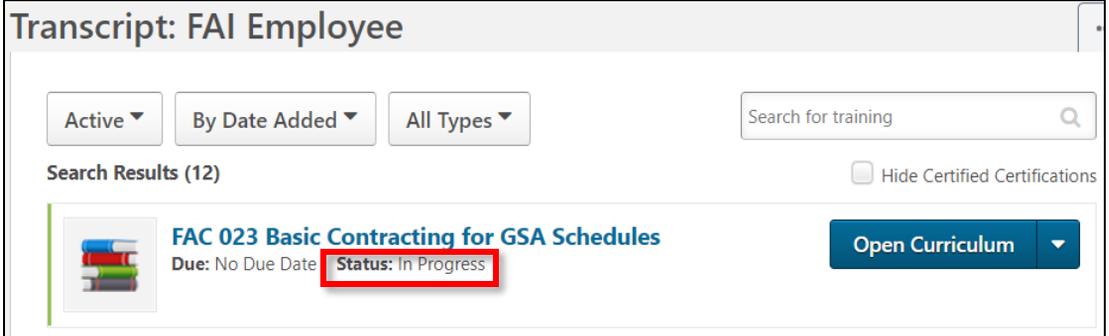
# View Transcript Status

*When you want to view your Transcript status...*

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



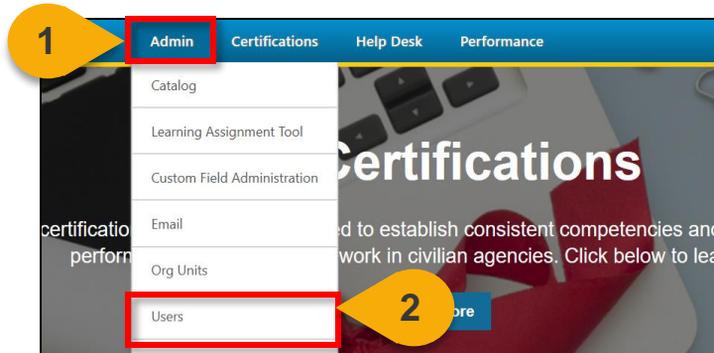
**Your Transcript will display in the screen. The status of your courses will be listed underneath the title of the course.**



# 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**.

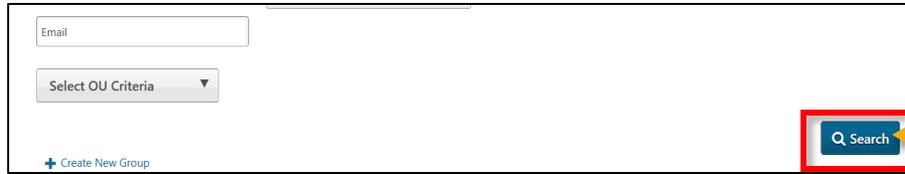
A screenshot of the 'Users' search form. The form contains several input fields: 'Last Name', 'City', 'Manager', 'First Name', 'State', 'Approver', 'User ID', 'Zip', 'Active', 'User Name', 'Country', and 'Email'. A red box highlights the entire search form area, and a yellow callout bubble with the number '3' points to the right side of the form. Below the search fields is a 'Select OU Criteria' dropdown menu.

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

A screenshot of the 'Users' search form, identical to the previous one. A red box highlights the 'Select OU Criteria' dropdown menu at the bottom of the form, and a yellow callout bubble with the number '4' points to it.

# Search for a User (Cont.1)

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

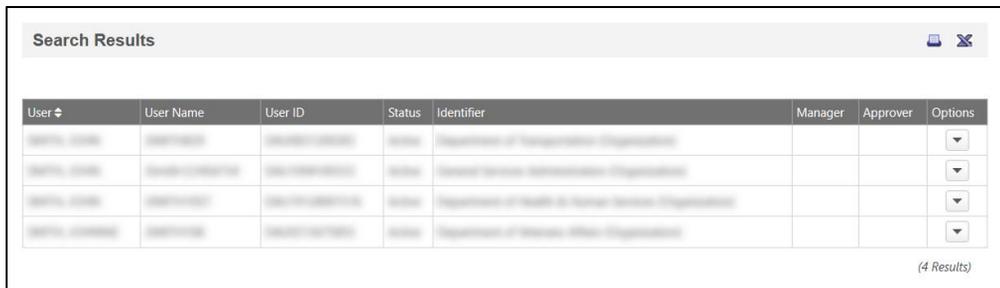


The screenshot shows a search interface with the following elements:

- An input field labeled "Email".
- A dropdown menu labeled "Select OU Criteria".
- A blue button with a magnifying glass icon and the text "Search".
- A link labeled "+ Create New Group".

The "Search" button is highlighted with a red rectangular box, and a yellow callout bubble with the number "5" points to it.

**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.**



The screenshot shows a "Search Results" window with a table of results. The table has the following columns: User, User Name, User ID, Status, Identifier, Manager, Approver, and Options. There are 4 rows of data, each with a dropdown arrow in the Options column. Below the table, it says "(4 Results)".

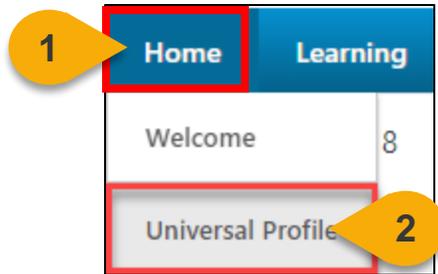
User	User Name	User ID	Status	Identifier	Manager	Approver	Options
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]			▼
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]			▼
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]			▼
[blurred]	[blurred]	[blurred]	[blurred]	[blurred]			▼

(4 Results)

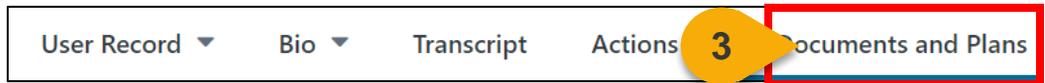
# View User's Record

*When you want to view your subordinate's user record...*

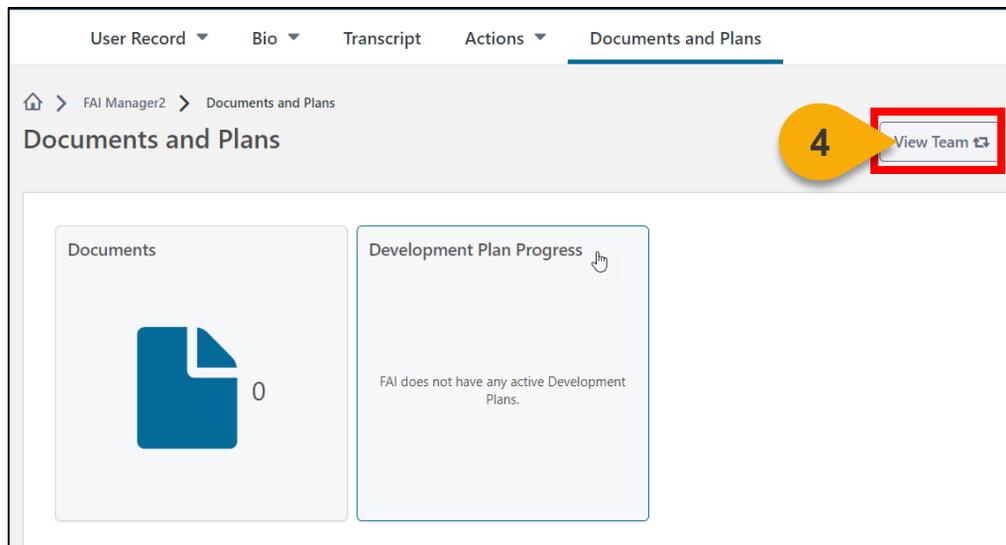
**Steps 1 & 2:** Hover over **Home**, then select **Universal Profile**.



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

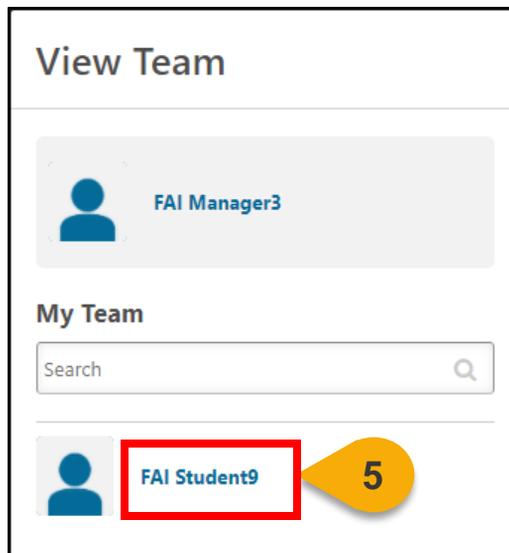


**Step 4:** Click on **View Team**.

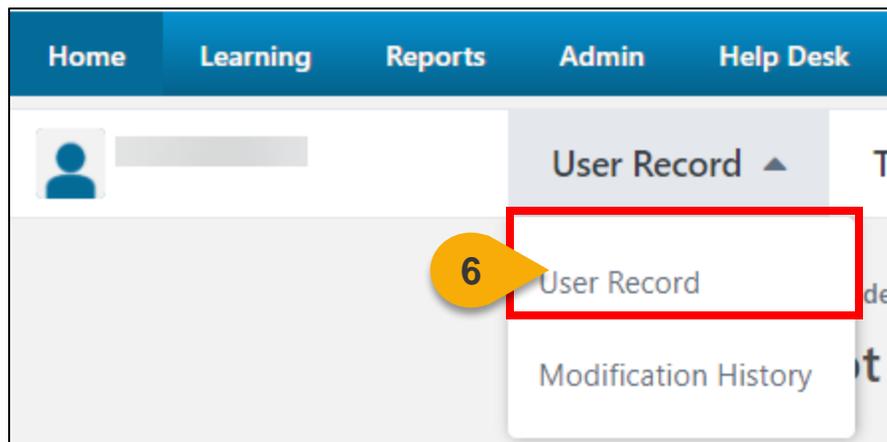


# View User's Record (Cont.1)

**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**.

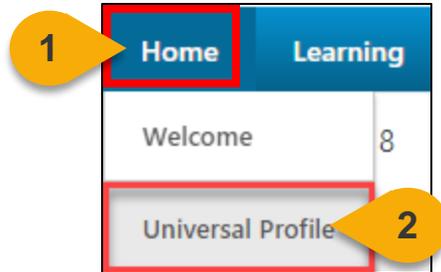


**Note:** Using the breadcrumbs on the page will take you back to YOUR User Record, not your subordinates.

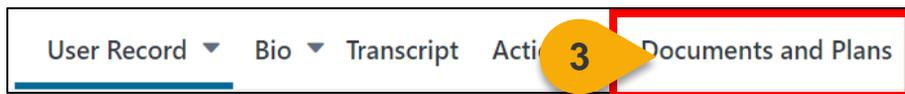
# View User's Transcript

*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**.



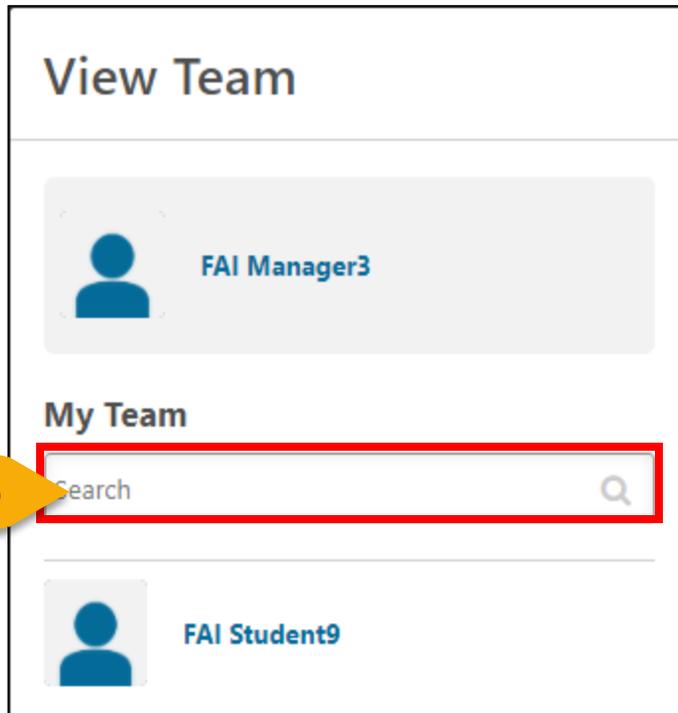
**Step 4:** Click on **View Team**.



# View User's Transcript (Cont.1)

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

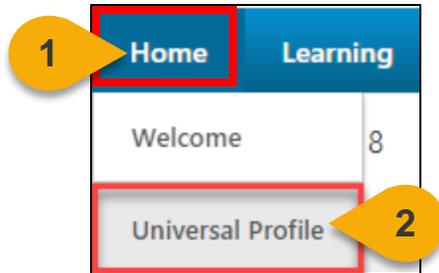
**Step 6:** After selecting the Employee whose transcript you'd like to view, you will be taken to their transcript.



# View Your Team

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

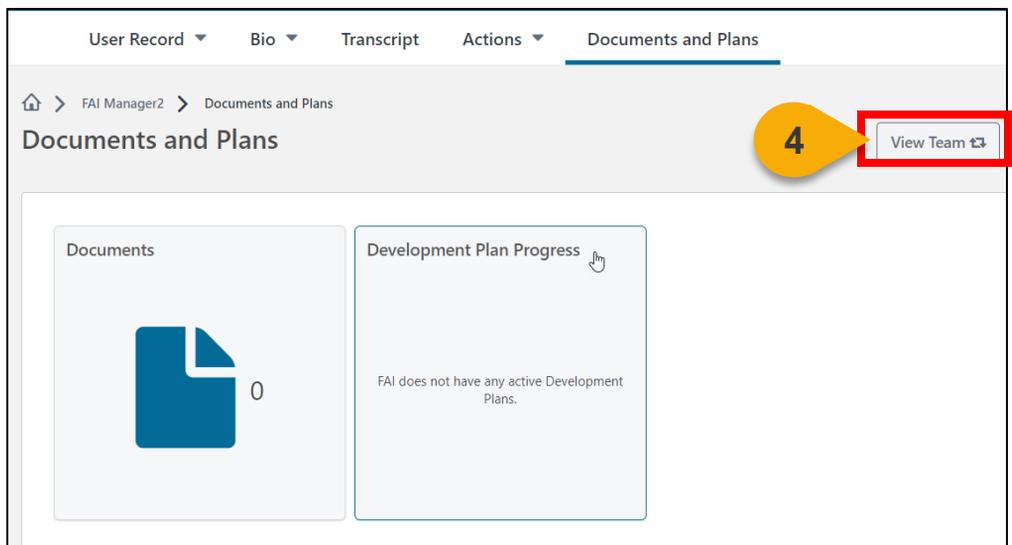
**Steps 1, 2: Hover over Home > select Universal Profile.**



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



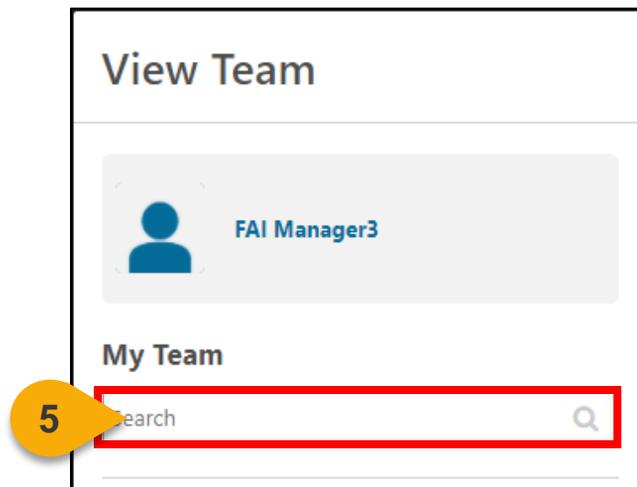
**Step 4: Click on View Team.**



# 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

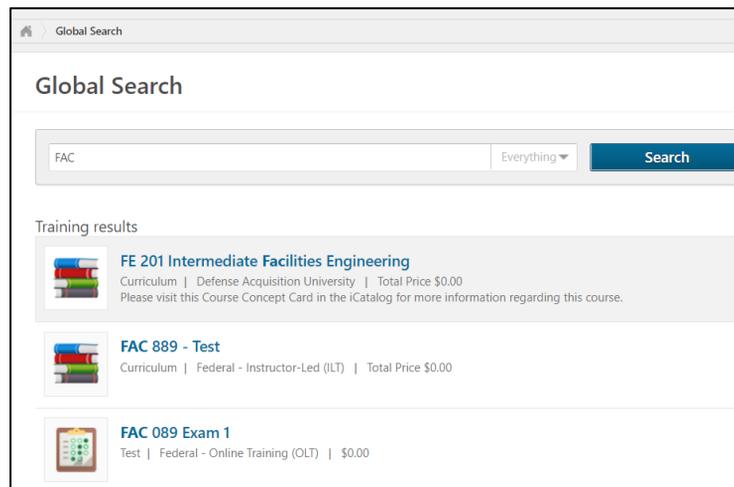
*When you want to search for Training, Certifications, or Forms...*

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

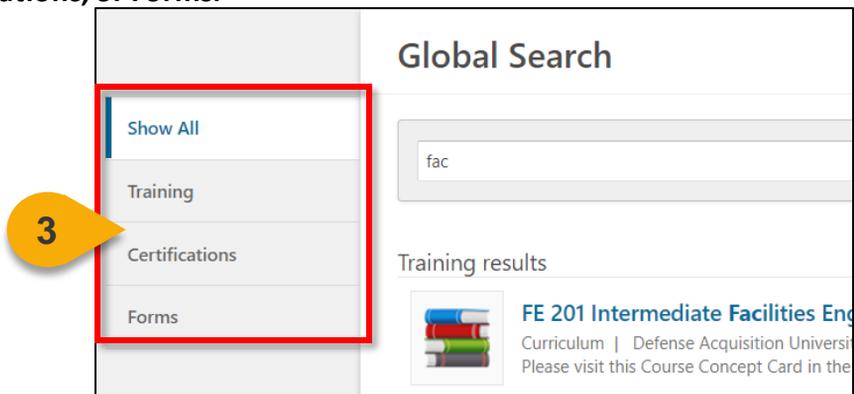
**Step 1:** Enter your desired Search Terms and click the Magnifying Glass or hit enter to search.



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.



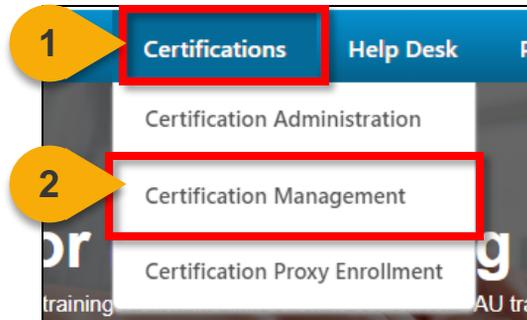
# External Training



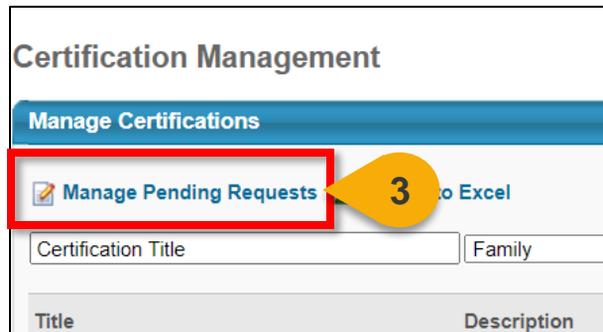
# Approve or Deny External Training Request

*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.

Requested By	Organizational Unit	Requested Date	Request Type	Certification Title	Options
	Federal Organizations (Organization) Virna Winters (Manager)	1/15/2021 4:03 PM	External Training	CLA - Contracting (FAC-C All Levels	

# 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.

Training Description:	Acquisition Topics
Institution:	Acquisition Topics
Training Dates:	From 1/6/2021 To 2/3/2021
Training Hours:	45 Hours 0 Minutes
External Training Category:	Training/Education
Attachment(s):	 Attachments
	 <a href="#">blankdoc.docx</a>
Apply Training To:	External Training ▼

**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.

Category:	
Attachment(s):	 Attachments
	 <a href="#">blankdoc.docx</a>
Apply Training To:	External Training ▼
Requested CLP	45.00
Decision	-- Select -- ▼

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

Category:	
Attachment(s):	 Attachments
	 <a href="#">blankdoc.docx</a>
Apply Training To:	External Training ▼
Requested CLP	45.00
Decision	-- Select -- ▼

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

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

Requested CLP	45.00
Decision	Approve 
Comments	-- Select --
	Approve
	Deny



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

Decision	Approve 
Comments	<input type="text"/>



**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.

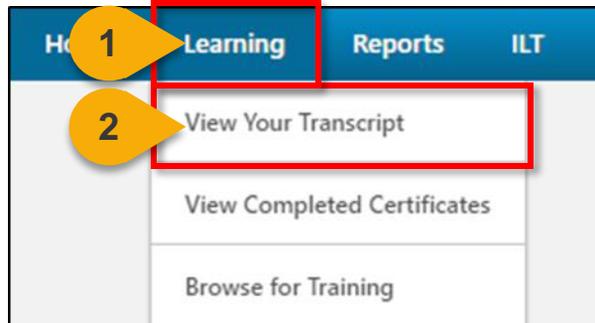
Decision	Approve 
Comments	<input type="text"/>



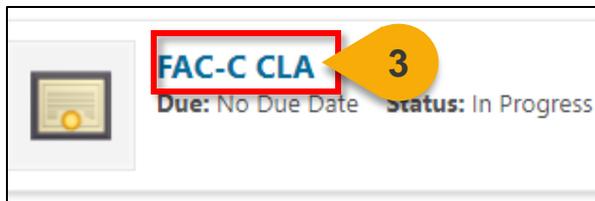
# Request External Training Credit Within a Certification

When you want to request external credit from within the certification...

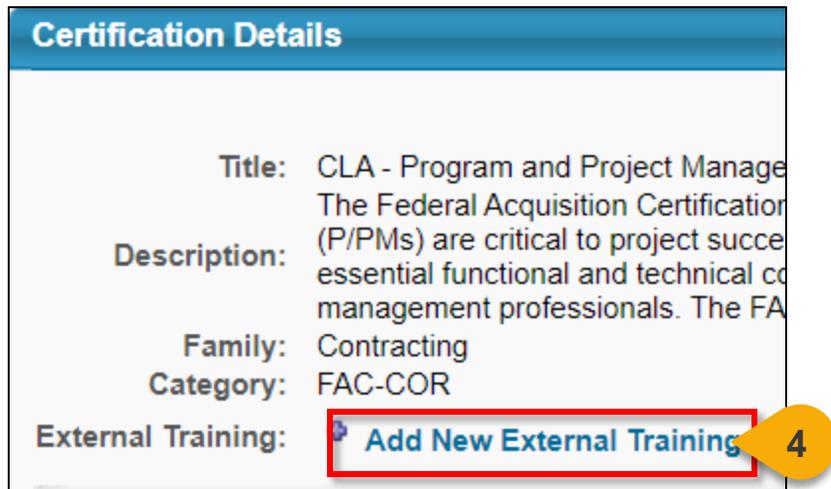
**Steps 1 & 2:** Hover over the **Learning** tab and click **View Your Transcript**.



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

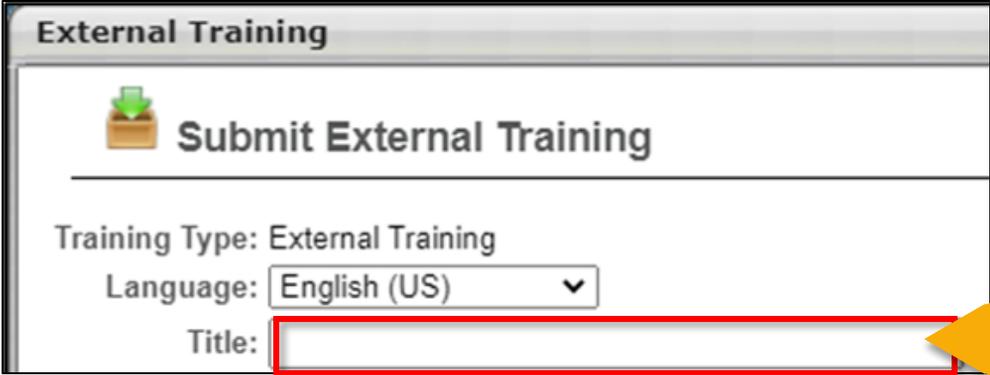


**Step 4:** Click on **Add New External Training**.



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

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



**External Training**

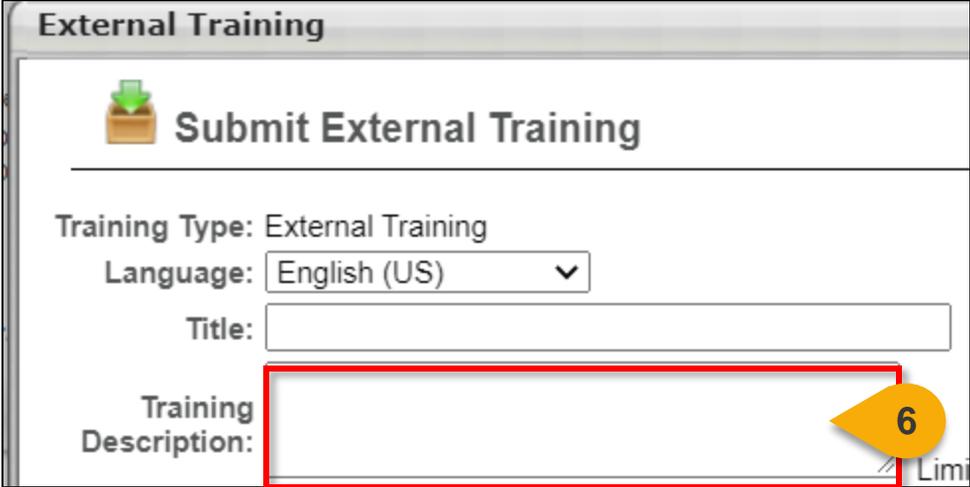
 **Submit External Training**

Training Type: External Training

Language: English (US) ▼

Title:

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



**External Training**

 **Submit External Training**

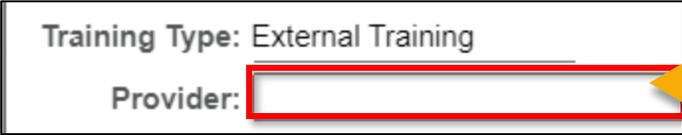
Training Type: External Training

Language: English (US) ▼

Title:

Training Description:

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



Training Type: External Training

Provider:

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

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

Training Dates: From  To  8

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

Training Hours:  Hours  Minutes 9

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

External Training Category:  Select 10

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

External Training Category:  Select 11

- Select
- Training/Education
- Professional Organization/Events
- Publishing Articles
- Participation in Experiential Activities
- Other

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

FAI CLPs:  12

Attachment(s):

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

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

FAI CLPs:

Attachment(s):   13

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

FAI CLPs:

Attachment(s): 

Apply Training To: --Select-- 14

Requested CLP:

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

Apply Training To: --Select--

Requested CLP: --Select--

Training

CSOD Training

External Training

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

Apply Training To: --Select--

Requested CLP:  16

# 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.

FAI CLPs:

Attachment(s): 

Apply Training To:  

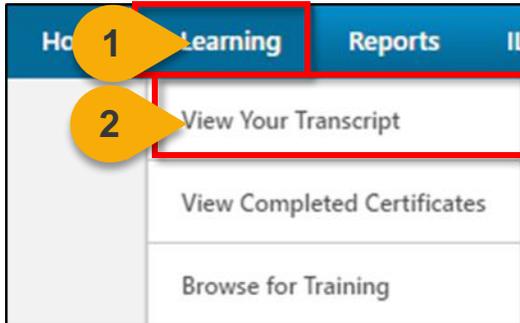
Requested CLP:

**17**

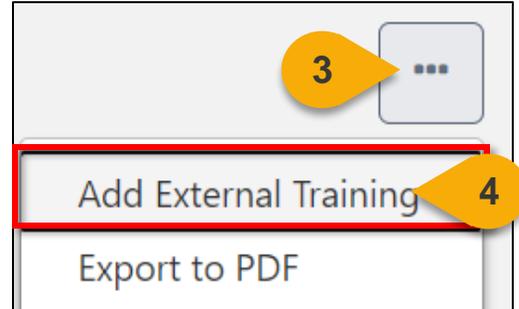
# Request External Training Credit from Transcript

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

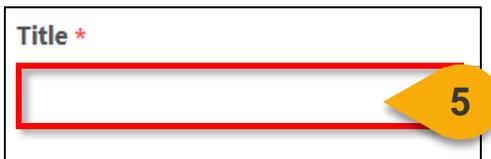
**Steps 1 & 2:** Hover over the **Learning** tab and click **View Your Transcript**.



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

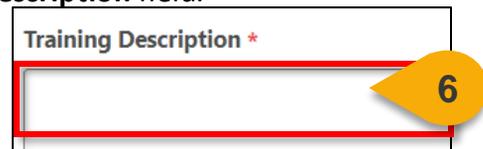


**Step 5:** Enter the title of your external training in the **Title** field.



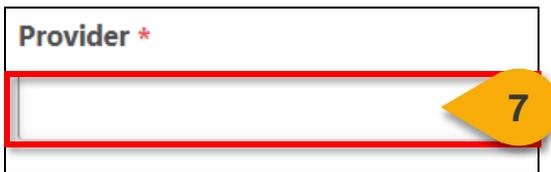
A screenshot of a text input field labeled 'Title \*'. The field is highlighted with a red box and a yellow callout '5'.

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



A screenshot of a text input field labeled 'Training Description \*'. The field is highlighted with a red box and a yellow callout '6'.

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



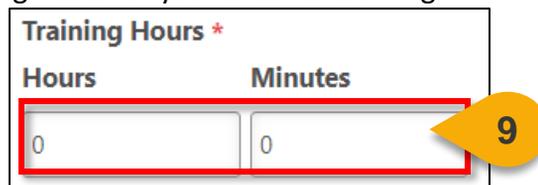
A screenshot of a text input field labeled 'Provider \*'. The field is highlighted with a red box and a yellow callout '7'.

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



A screenshot of a form section labeled 'Training Dates \*'. It contains two date input fields: 'Start Date' and 'End Date'. Both fields are highlighted with a red box and a yellow callout '8'.

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

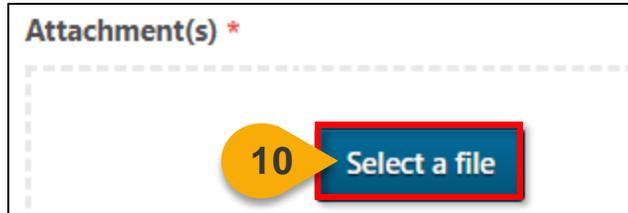


A screenshot of a form section labeled 'Training Hours \*'. It contains two input fields: 'Hours' and 'Minutes'. Both fields are highlighted with a red box and a yellow callout '9'.

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

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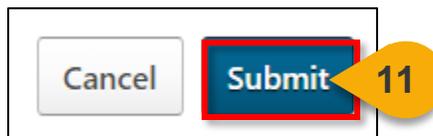
**Step 10:** Click **Select File** to add proof of your successful completion of your External Training.



Attachment(s) \*

10 Select a file

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

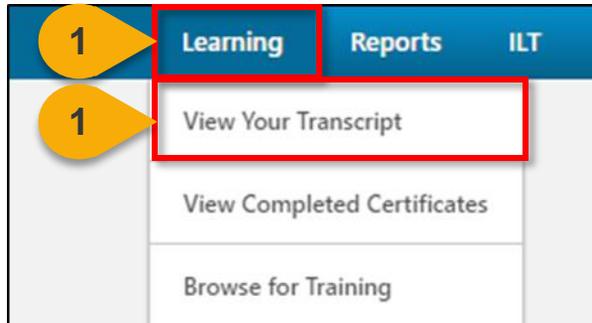


Cancel Submit 11

# Add External Training to a Certification

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

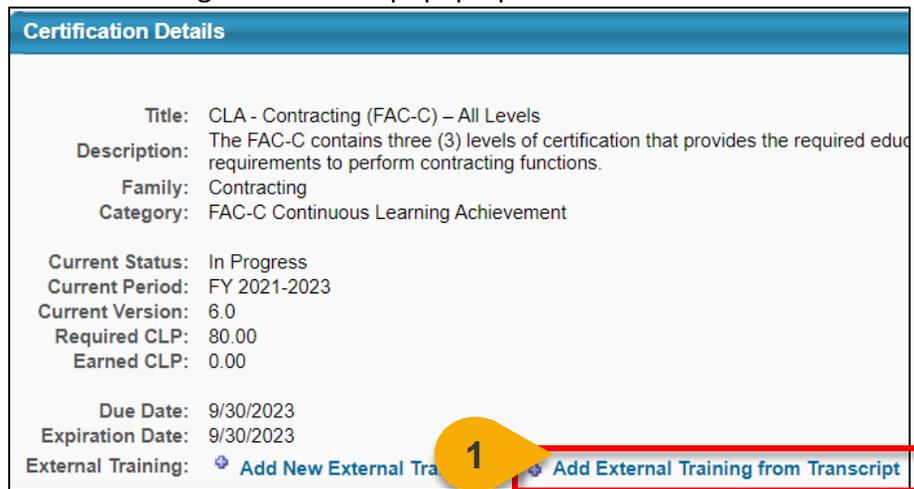
**Steps 1 & 2:** Hover over the **Learning** tab and then click **View Your Transcript**.



**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

External Training

Submit External Training From Transcript

Select a Section : External Training ▾

--Select--  
Training  
CSOD Training  
External Training

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input type="checkbox"/>	Test	Complete	8.00

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

External Training

Submit External Training From Transcript

Select a Section : CSOD Training ▾

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Complete	8.00

**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.

External Training

Submit External Training From Transcript

Select a Section : CSOD Training ▾

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Complete	8.00

# 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.

**External Training**

**Submit External Training From Transcript**

Select a Section :

Enter the number of credits earned for this item. If the credits are present, you may edit the amount before submitting for approval.

Select	Title	Status	CLP
<input checked="" type="checkbox"/>	Test	Completed	<input type="text" value="8.00"/>

**8**

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

CERTIFICATION	CLP	STATUS
<b>TITLE</b>		
Training (Required CLP: Min = 80.00, Max = 80.00 / A		
CSOD Training (Required CLP: Min = 0.00, Max = 8		
Test	8.00	Completed (Evidence Needed)
CLM 090 Sustainable Military Facilities	8.00	Completed
CLM 092 Master Planning Energy and Sustain	8.00	Not Activated



# Online Training



# Register for Online Training (OLT)

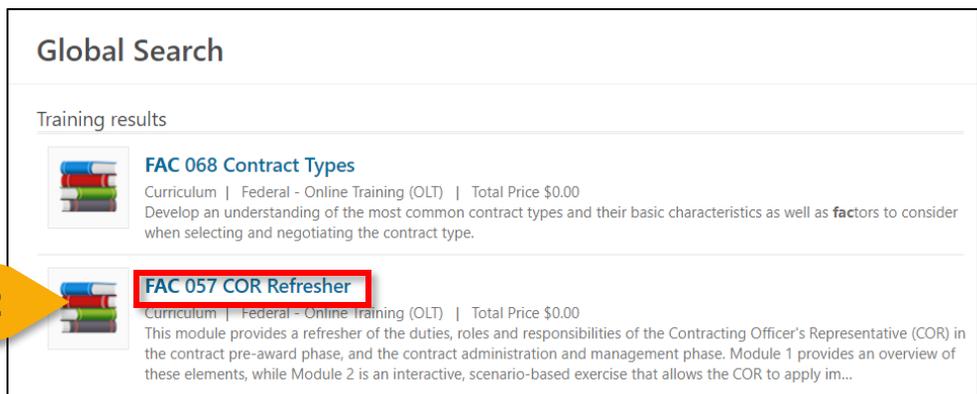
*When you want to register for Online Training...*

**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.**



A search bar with the word "Search" on the left. To the right of the text input field is a magnifying glass icon, which is highlighted by a red rectangular box. A yellow callout bubble with the number "1" points to the magnifying glass icon.

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



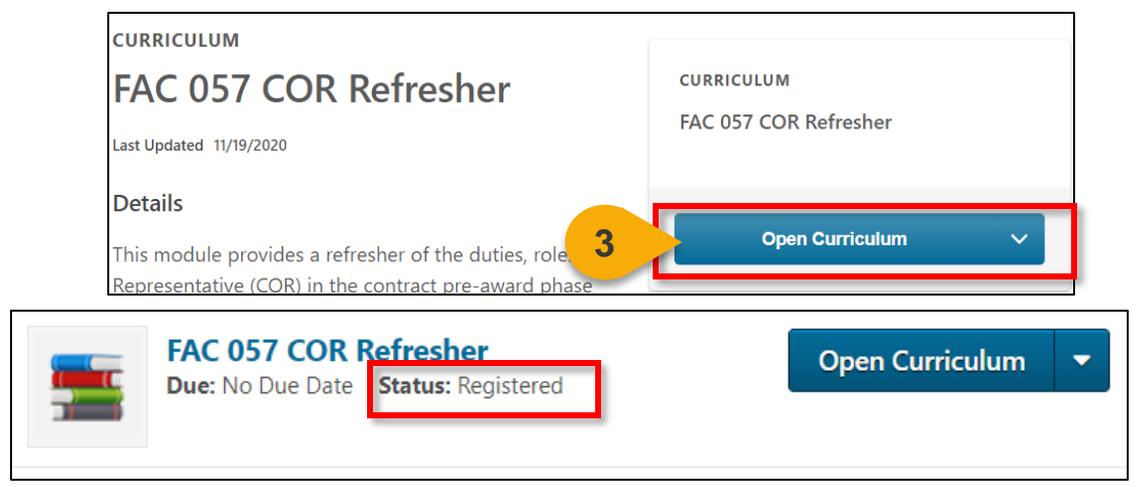
**Global Search**

Training results

-  **FAC 068 Contract Types**  
Curriculum | Federal - Online Training (OLT) | Total Price \$0.00  
Develop an understanding of the most common contract types and their basic characteristics as well as factors to consider when selecting and negotiating the contract type.
-  **FAC 057 COR Refresher**  
Curriculum | Federal - Online Training (OLT) | Total Price \$0.00  
This module provides a refresher of the duties, roles and responsibilities of the Contracting Officer's Representative (COR) in the contract pre-award phase, and the contract administration and management phase. Module 1 provides an overview of these elements, while Module 2 is an interactive, scenario-based exercise that allows the COR to apply im...

A yellow callout bubble with the number "2" points to the title "FAC 057 COR Refresher", which is also enclosed in a red rectangular box.

**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.**



**CURRICULUM**

## FAC 057 COR Refresher

Last Updated 11/19/2020

**Details**

This module provides a refresher of the duties, roles and responsibilities of the Contracting Officer's Representative (COR) in the contract pre-award phase

**Open Curriculum** ▼

**FAC 057 COR Refresher**  
Due: No Due Date **Status: Registered** **Open Curriculum** ▼

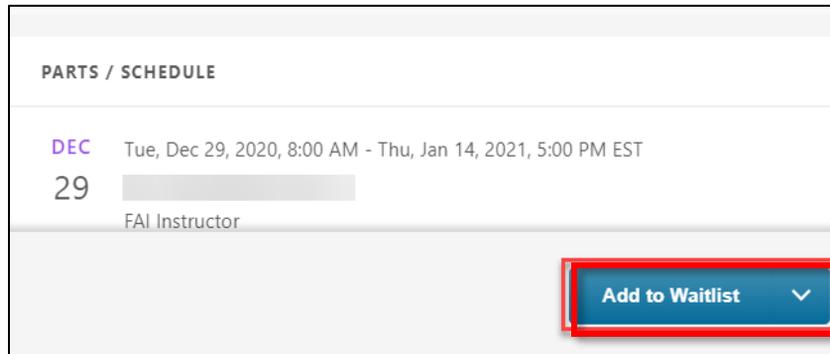
A yellow callout bubble with the number "3" points to the "Open Curriculum" button, which is highlighted with a red rectangular box. In the course card below, the text "Status: Registered" is also highlighted with a red rectangular box.

# Submit an Exception Request

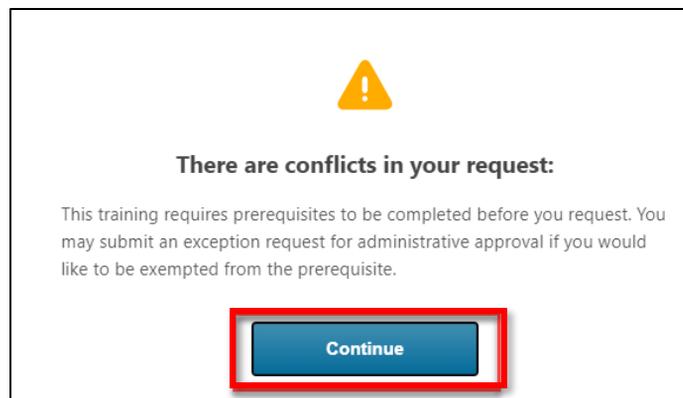
When you want to submit an Exception Request for a course prerequisite...

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.**

The screenshot shows a search bar on the left with a red box around it and a yellow callout bubble with the number '1' pointing to the search input field. On the right, there is a navigation menu with tabs for 'Home', 'Learning', and 'Help Desk'. Under the 'Learning' tab, there are three options: 'View Your Transcript', 'Preview Training Content', and 'Events Calendar'. A red box highlights the 'Events Calendar' option, and a yellow callout bubble with the number '1' points to it.

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

The screenshot shows the 'Events Calendar' interface. On the left, there is a calendar for November 2020. Below it, there are search filters: 'Title', 'Session ID', 'Location', 'Session Instructor', and 'All'. A red box highlights these filters, and a yellow callout bubble with the number '2' points to it. On the right, there is a calendar view for November 2020 with a table of events. The table has columns for 'SUNDAY' and 'MONDAY'. The events listed are 'ACQ 1700 Agile for DoD Acquisition Team Members' on Sunday 1st and Monday 2nd, and another instance on Sunday 8th and Monday 9th.

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

The screenshot shows a session card for an event. The card displays the date 'Mon, Dec 7, 2020, 8:00 AM - Thu, Dec 10, 2020, 5:00 PM EST', the session ID 'VA: CON 100FED-2021-01', and the instructor 'FAI Instructor'. Below this, it shows the location: 'Federal Organizations - Locations > VA Acquisition Academy (VAAA) > Virtual Instructor-Led Training (VAAA)'. At the bottom right of the card, there is a blue 'Request' button with a dropdown arrow. A yellow callout bubble with the number '3' points to the 'Request' button.

# 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.**

The screenshot shows the 'Global Search' interface. A search bar with the placeholder text 'What would you like to search for?' is highlighted with a red box and a yellow callout '1'. Below the search bar is a 'Refine search' link. The search results section is titled 'Training results (132)'. A search result for 'CMC 200 Fees, Financing, and Payments' is highlighted with a red box and a yellow callout '2'. The result includes a small icon, the event title, and a brief description: 'Event | Defense Acquisition University | \$0.00. Please visit this Course Concept Card in the iCatalog for more information regarding this course. You can apply for this course at <https://www.dau.edu/training/p/apply-for-a-course>'.

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

The screenshot shows the 'EVENT' page. A 'Notify Me' button is highlighted with a red box and a yellow callout '3'. Below the button is a dropdown menu with the following options: 'Select a Session', 'Save for Later', and 'Notify Me of New Sessions'. The 'Notify Me of New Sessions' option is highlighted with a red box and a yellow callout '3'.

**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.**

The screenshot shows the 'Interest Tracking' form. A 'Location' field with the placeholder text 'Select a Location' is highlighted with a red box and a yellow callout '4'.

# 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”.**

**Comments**

Enter your comments here

**5**  Notify me when sessions are scheduled at any location

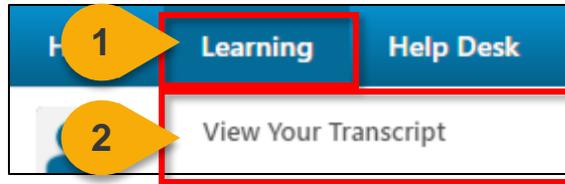
**Step 6: Once you have completed selecting the location preferences, click the Submit button at the bottom of the page.**

**6**

# 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.**

**Withdraw Registration**

If you withdraw your registration for this session, you will immediately be withdrawn from the roster.

**Session Details**

Event Name: Con 100 (FED): Shaping Smart Business Arrangements  
Date / Time: (1) 12/7/2020 8:00 AM - 12/10/2020 5:00 PM  
Location: Virtual Instructor-Led Training (VAAA)  
Price: \$0.00

**SESSION WITHDRAWAL OPTIONS**

Please select a reason

- Please select a reason
- Other
- Sickness/Family Emergency
- Inclement Weather
- Leave
- No Longer Needed
- Reschedule Due to Conflict
- TDY
- Technology Issue
- Workload



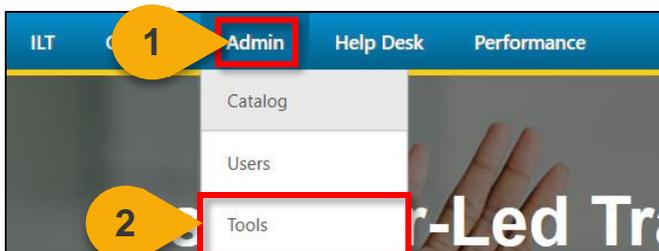
# Remove Training



# Remove Training from Transcript Using Training Removal Tool

When you want to remove the same training for multiple Users...

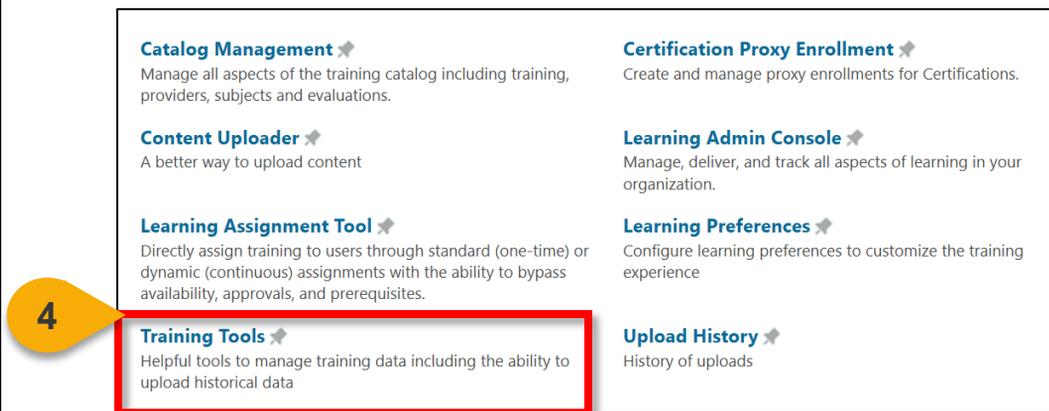
**Steps 1 & 2:** Hover over **Admin**, then select **Tools**.



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

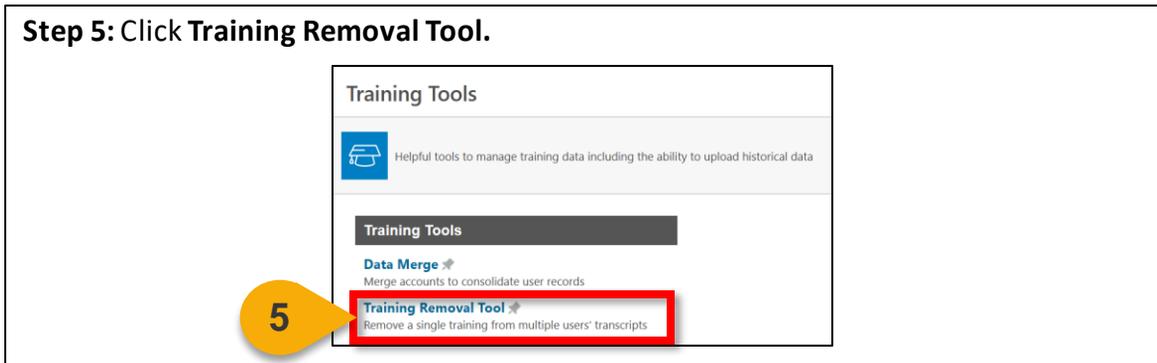


**Step 4:** Click **Training Tools**.



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

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



Training Tools

Helpful tools to manage training data including the ability to upload historical data

**Training Tools**

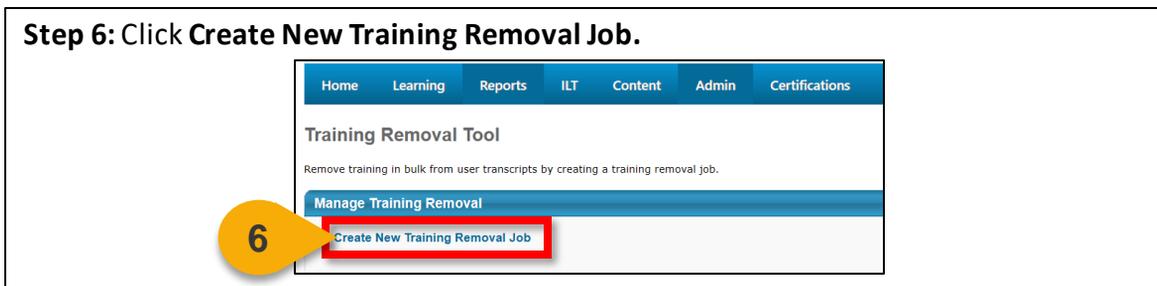
Data Merge

Merge accounts to consolidate user records

**Training Removal Tool**

Remove a single training from multiple users' transcripts

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



Home Learning Reports ILT Content Admin Certifications

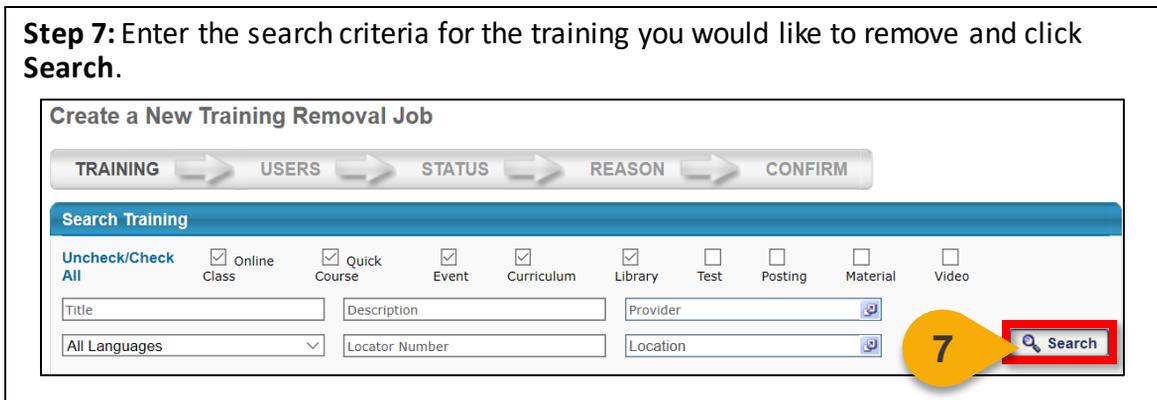
**Training Removal Tool**

Remove training in bulk from user transcripts by creating a training removal job.

Manage Training Removal

**Create New Training Removal Job**

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



Create a New Training Removal Job

TRAINING > USERS > STATUS > REASON > CONFIRM

**Search Training**

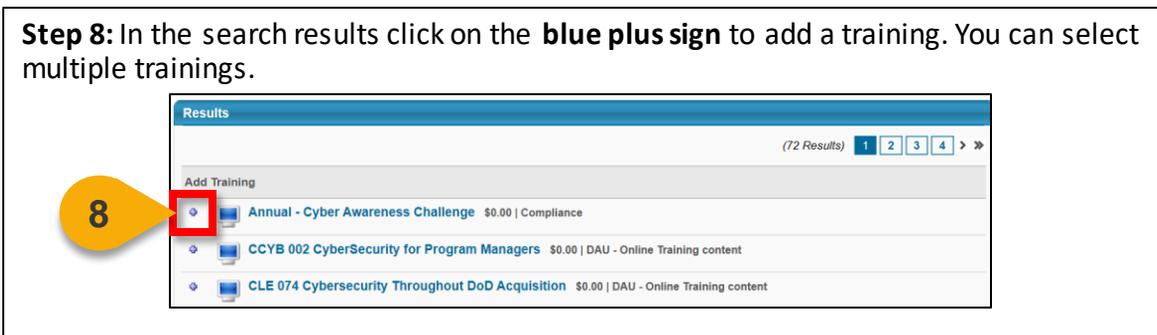
Uncheck/Check All  Online Class  Quick Course  Event  Curriculum  Library  Test  Posting  Material  Video

Title  Description  Provider

All Languages  Locator Number  Location

**Search**

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



Results

(72 Results) 1 2 3 4 >>

Add Training

**+** Annual - Cyber Awareness Challenge \$0.00 | Compliance

CCYB 002 CyberSecurity for Program Managers \$0.00 | DAU - Online Training content

CLE 074 Cybersecurity Throughout DoD Acquisition \$0.00 | DAU - Online Training content

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

## Step 9: Click Next.

**Search Training**

Uncheck/Check All  Online Class  Quick Course  Event  Curriculum  Library  Test  Posting  Material  Video

Intermediate Cross Cultural Competence  Provider

All Languages  Location

Selected Training

Intermediate Cross Cultural Competence and Regional Orientation (CENTCOM) Users will be skipped if they have active sessions under this event on their Transcript.

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

**Select Users**

Availability

The availability criteria that you select will only include employees who meet the following criteria: (Organization is or below Federal Organizations)

Select Criteria

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

**Select Users**

Select at least one user or OU to continue.

Availability

The availability criteria that you select will only include employees who meet the following criteria: (Organization is or below Federal Organizations)

All Users

## Step 12: Click Next.

**Select Users**

Availability

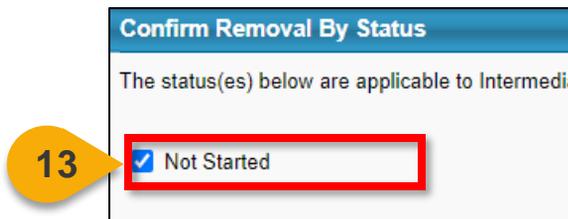
The availability criteria that you select will only include employees who meet the following criteria: (Organization is or below Federal Organizations)

Select Criteria

All users in Corporation: Defense Acquisition University (DAU) (Defense Acquisition University (DAU))

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

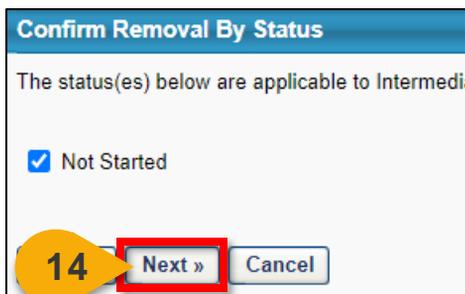
**Step 13:** Select which **training statuses** the learning object (LO) can be in on a User's transcript for the training to be removed.



**Confirm Removal By Status**  
The status(es) below are applicable to Intermedi

Not Started

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



**Confirm Removal By Status**  
The status(es) below are applicable to Intermedi

Not Started

**Next »** Cancel

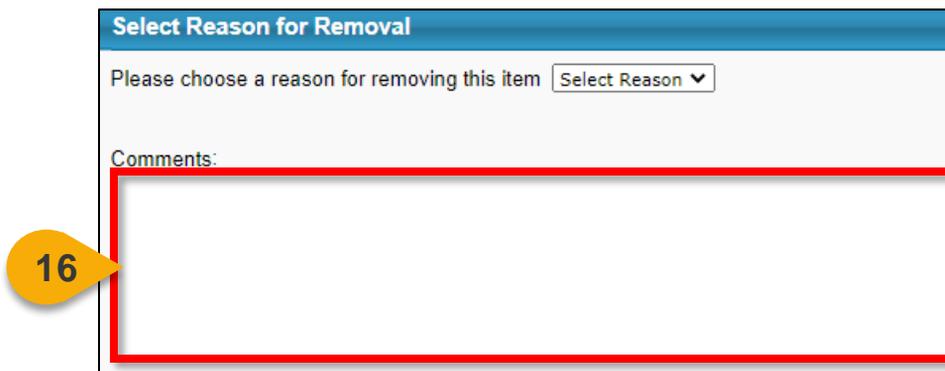
**Step 15:** Click the **Select Reason** drop-down to select the reason for removing the training.



**Select Reason for Removal**  
Please choose a reason for removin

Select Reason ▼

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



**Select Reason for Removal**  
Please choose a reason for removing this item Select Reason ▼

Comments:

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

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

Comments:

17 **Next »** Cancel

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

**Confirm Training Removal and Submit**

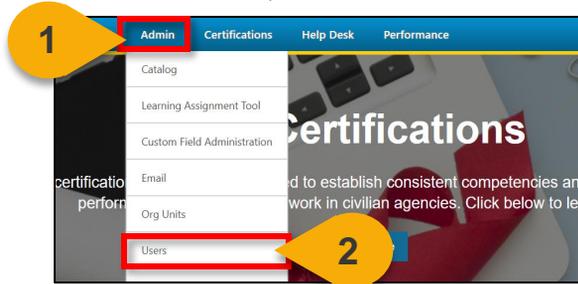
Select/Deselect All	Name	Current Status	User ID
<input checked="" type="checkbox"/>	Winters, Birdie	Not Started	Birdie_W

18 **Submit** Cancel

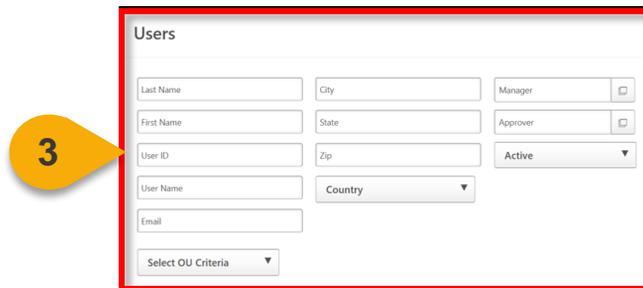
# Remove Training from Transcript

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

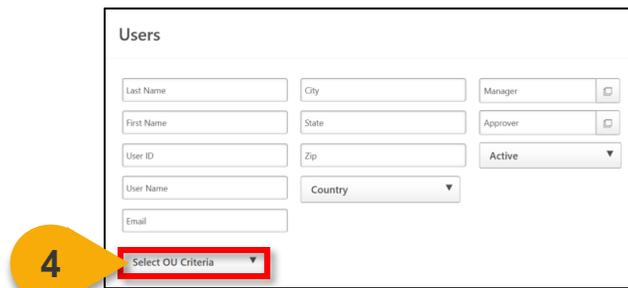
**Steps 1 & 2:** Hover over the **Admin** tab, then select **Users**.



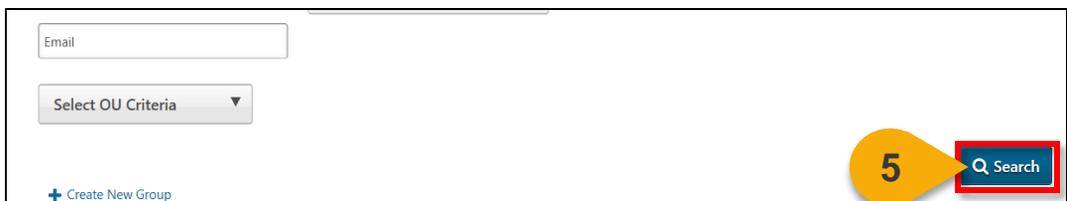
**Step 3:** Enter your search criteria into the **search fields** to look for a User.



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

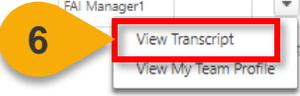


**Step 5:** Hit enter or click **Search**.



# 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.

User	User Name	User ID	Status	Identifier	Manager	Approver	Options
Winters, Birdie	Birdie_Winters	Birdie_Winters	Active	Department of Health & Human Services (Organization) FAI Manager1 (Manager)	FAI Manager1		

**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.

**Removing CLC 112 Contractors Accompanying the Force**

Once you remove this training item, it will no longer appear on the transcript. The following training filters have been added to certain training reports.

Remove training within the Curriculum 

Refund training items to user. Items will be refunded in the original amount. Items that are not refunded will not be refunded.

Please choose a reason for removing this item:

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

**Removing CLC 112 Contractors Accompanying the Force**

Once you remove this training item, it will no longer appear on the transcript. The following training filters have been added to certain training reports.

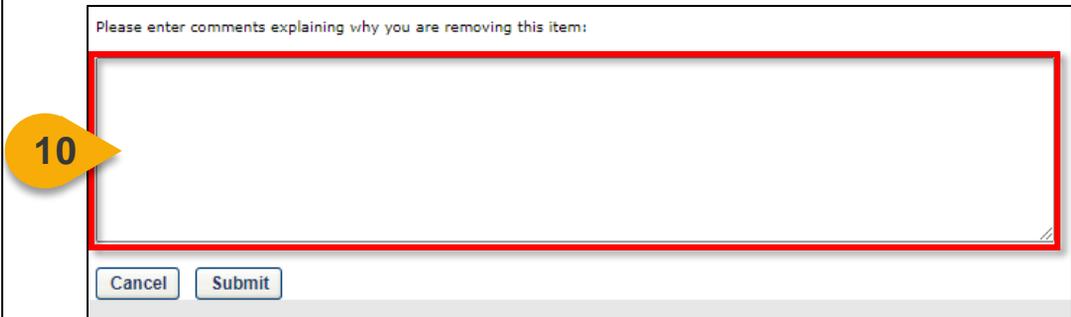
Remove training within the Curriculum

Refund training items to user. Items will be refunded in the original amount. Items that are not refunded will not be refunded.

Please choose a reason for removing this item: 

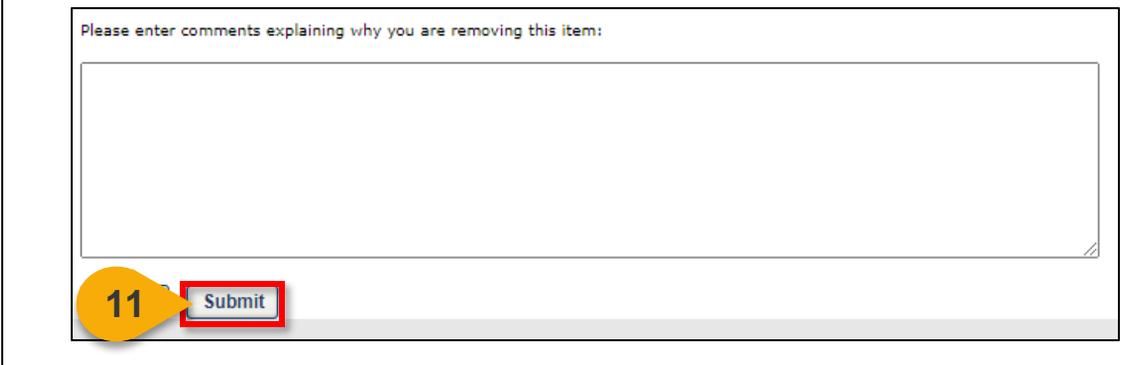
# Remove Training from Transcript (Cont.2)

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



A screenshot of a web form for entering a comment. The form has a title bar that reads "Please enter comments explaining why you are removing this item:". Below the title bar is a large, empty text input area. At the bottom of the form are two buttons: "Cancel" and "Submit". A yellow callout bubble with the number "10" points to the text input area. The entire form is enclosed in a red rectangular border.

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



A screenshot of the same web form as in Step 10. The form is identical, but now the "Submit" button is highlighted with a red rectangular border. A yellow callout bubble with the number "11" points to the "Submit" button.



# Certification Management



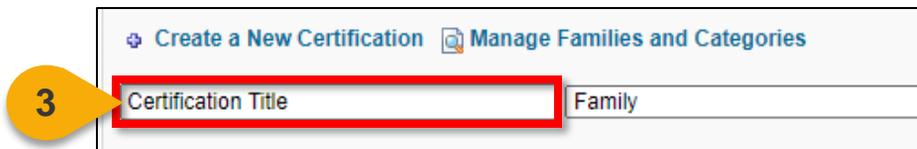
# View Certification Information

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

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



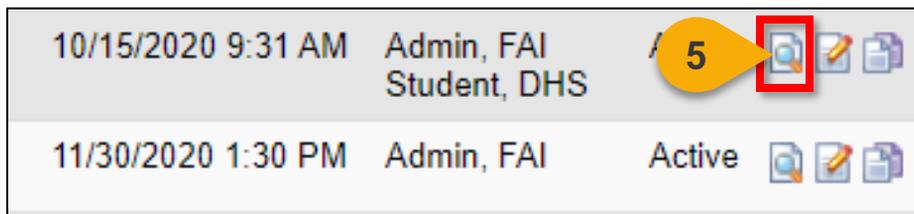
**Step 3:** Type in the name of the Certification in the **Certification Title** field. Alternatively, you can use the other search criteria available on this page.



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



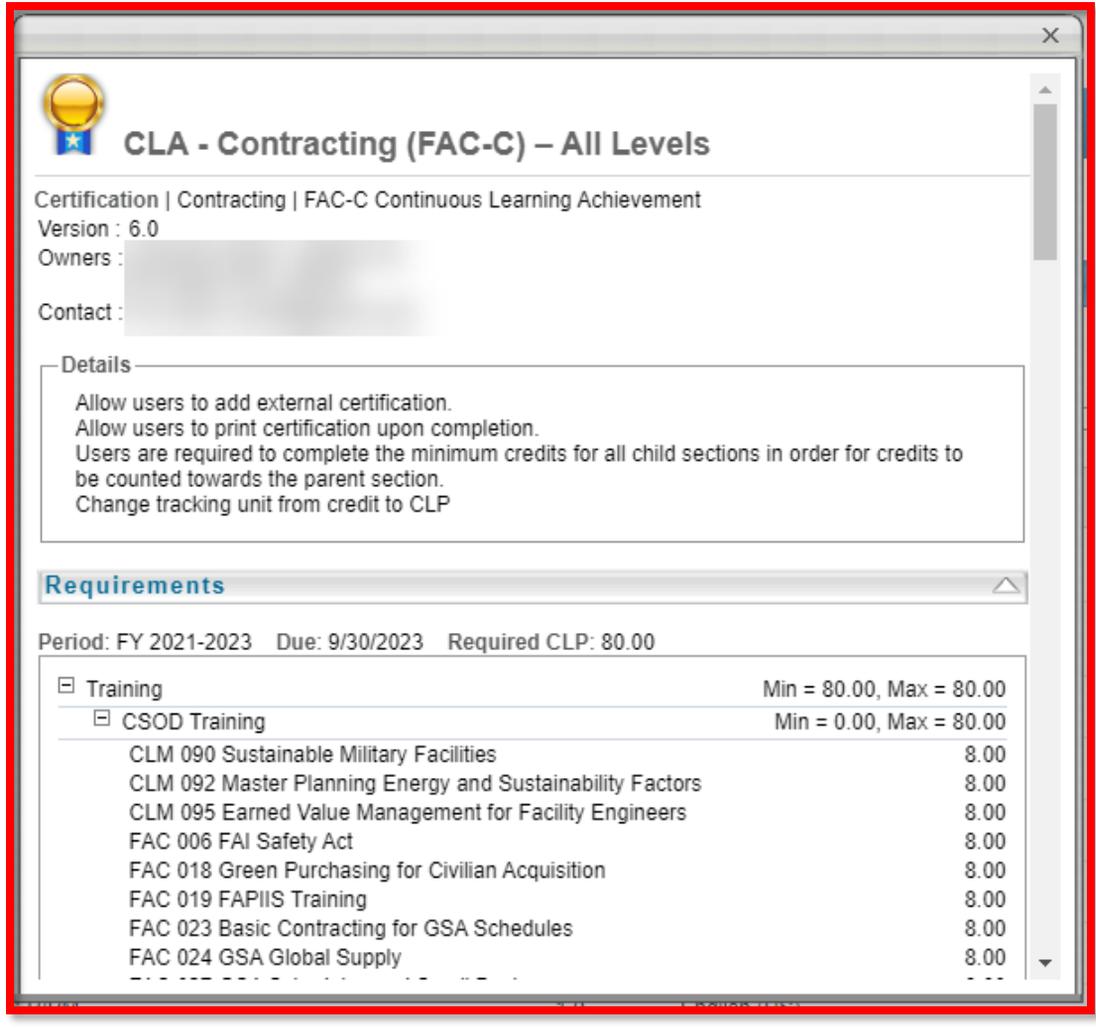
**Step 5:** Click on the **Magnifying Glass** icon to view information on the Certification of your choice.



# 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.



The screenshot displays a web application window titled "CLA - Contracting (FAC-C) - All Levels". The window contains the following information:

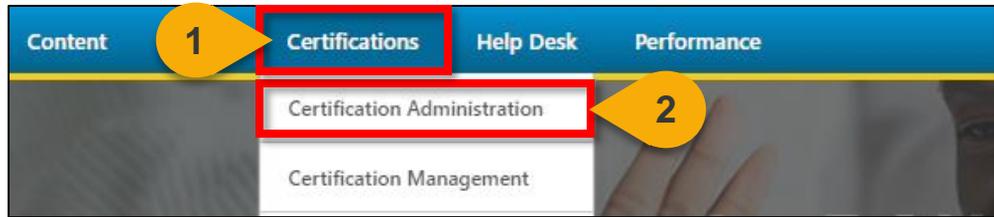
- Header:** CLA - Contracting (FAC-C) – All Levels
- Metadata:** Certification | Contracting | FAC-C Continuous Learning Achievement, Version : 6.0, Owners : [Redacted], Contact : [Redacted]
- Details:**
  - Allow users to add external certification.
  - Allow users to print certification upon completion.
  - Users are required to complete the minimum credits for all child sections in order for credits to be counted towards the parent section.
  - Change tracking unit from credit to CLP
- Requirements:**
  - Period: FY 2021-2023 Due: 9/30/2023 Required CLP: 80.00
  - Training** (Min = 80.00, Max = 80.00)
    - CSOD Training** (Min = 0.00, Max = 80.00)
      - CLM 090 Sustainable Military Facilities 8.00
      - CLM 092 Master Planning Energy and Sustainability Factors 8.00
      - CLM 095 Earned Value Management for Facility Engineers 8.00
      - FAC 006 FAI Safety Act 8.00
      - FAC 018 Green Purchasing for Civilian Acquisition 8.00
      - FAC 019 FAPIIS Training 8.00
      - FAC 023 Basic Contracting for GSA Schedules 8.00
      - FAC 024 GSA Global Supply 8.00



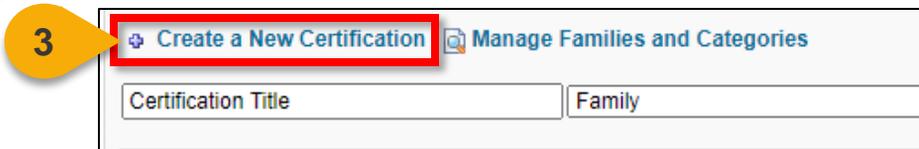
# Create Certifications

*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.



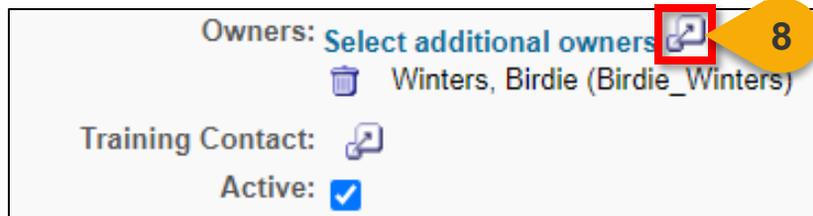
# Create Certifications (Cont.1)

**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.



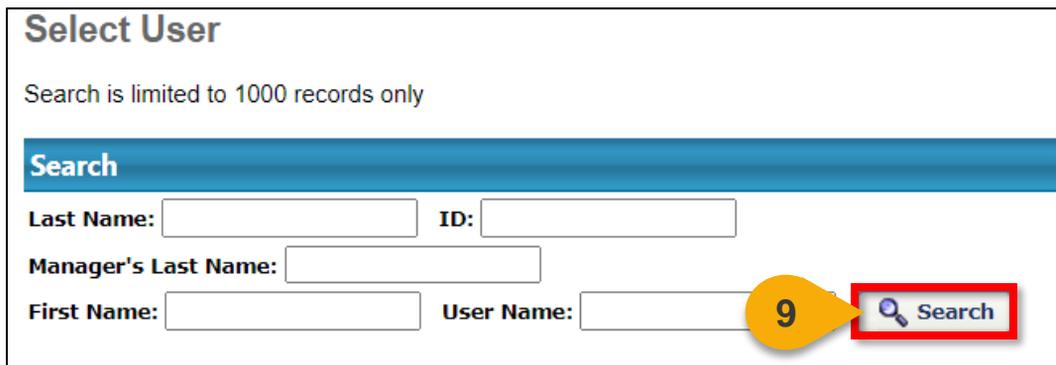
Family: --Select--  
Category: --Select--  
Available Languages: English (US)  
Default Language: English (US) : This is the language in which the certification is shown to the user  
Version: 1.0  
Owners: [Select additional owners](#)

**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.



Owners: [Select additional owners](#)  
Winters, Birdie (Birdie\_Winters)  
Training Contact:  
Active:

**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**.



**Select User**  
Search is limited to 1000 records only

**Search**

Last Name:  ID:   
Manager's Last Name:   
First Name:  User Name:

# Create Certifications (Cont.2)

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

Search Results		
ADD	NAME	IDENTIFIER
	Student 5, DSCU	Defense Security Cooperation Agency (DSCA) (Organization) DSCU Manager 1 (Manager)
	Student 6, DSCU	Defense Security Cooperation Agency (DSCA) (Organization)
	Student 8, FAI	Federal Organizations (Organization) FAI Admin (Manager)

10

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

	Student3, GSA	General Services Administration (Organization) GSA Manager (Manager)	GSA_Student3
	Student4, DHS	Bureau Of Immigration And Customs Enforcement (Organization) DHS Manager (Manager)	DHS_Student4



11

**Step 12:** Click the **popup** 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.

Owners: [Select additional owners](#) 

 Admin, FAI (FAI\_Admin)

Training Contact: 

Active:

# 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**.

**Select User**

Search is limited to 1000 records only

**Search**

Last Name:  ID:

Manager's Last Name:

First Name:  User Name:

**13** 

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

 <b>Admin, DSCU Certification</b>	Defense Security Cooperation Agency (DSCA) (Organization)	<input type="checkbox"/>
 <b>Admin, DTRA</b>	Defense Threat Reduction Agency (DTRA) (Organization)	<input type="checkbox"/>
<b>14</b>  <b>Admin, FAI</b>	Federal Organizations (Organization) FAI Manager1 (Manager)	<input type="checkbox"/>

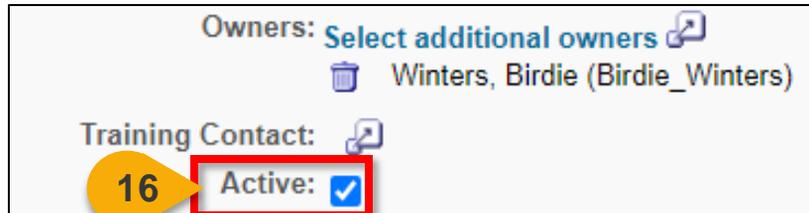
**Step 15:** Click **Done** to close the popup window and confirm the Training Contact.

 <b>Student3, GSA</b>	General Services Administration (Organization) GSA Manager (Manager)	GSA_Student3
 <b>Student4, DHS</b>	Bureau Of Immigration And Customs Enforcement (Organization) DHS Manager (Manager)	DHS_Student4

**15** 

# Create Certifications (Cont.4)

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



Owners: [Select additional owners](#)   
Winters, Birdie (Birdie\_Winters) 

Training Contact: 

**16** Active:

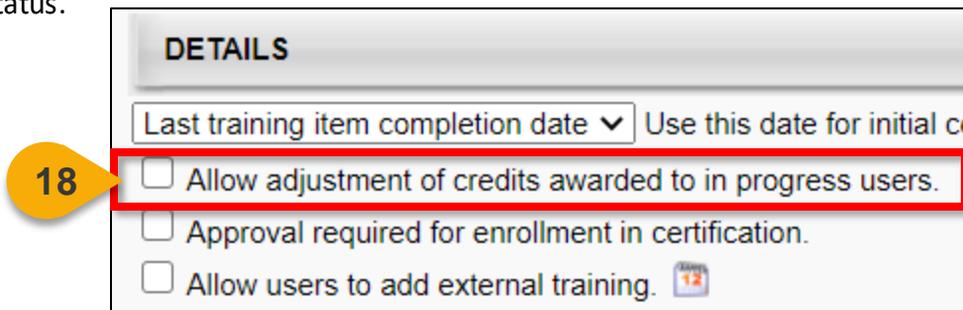
**Step 17:** Click the **first drop-down in the Details section** to select the Initial Certification date. You can choose to have this date be the day the last training item was completed (recommended) or the day the User registered for the Certification.



**DETAILS**

Last training item completion date  **17** date for initial certification d

**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.



**DETAILS**

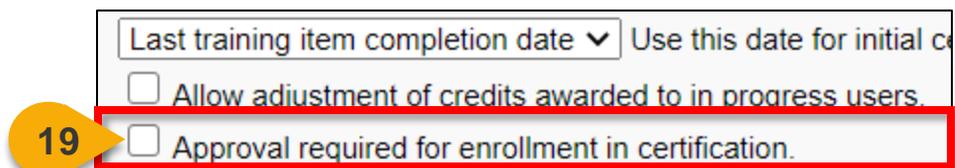
Last training item completion date  Use this date for initial c

**18**  Allow adjustment of credits awarded to in progress users.

Approval required for enrollment in certification.

Allow users to add external training. 

**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.



Last training item completion date  Use this date for initial c

Allow adjustment of credits awarded to in progress users.

**19**  Approval required for enrollment in certification.

# 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.

**DETAILS**

Last training item completion date Use this date for initial c

Allow adjustment of credits awarded to in progress users.

Approval required for enrollment in certification.

Allow users to add external training.

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

Approval required for enrollment in certification.

Allow users to add external

Delegate approval process of external training to user's manager.

Override LO Availability

Allow users to print certificate upon completion.

**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.

Approval required for enrollment in certification.

Allow users to add external training.

Delegate approval process of external training to user's manager.

Override LO Availability

Allow users to print certificate upon completion.

# Create Certifications (Cont.6)

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

23

- Allow users to add external training. 
- Delegate approval process of external training to user's manager.
- Override LO Availability**
- Allow users to print certificate upon completion.
- Allow users to request exemption from prerequisite.

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

24

- Allow users to add external training. 
- Delegate approval process of external training to user's manager.
- Override LO Availability**
- Allow users to print certificate upon completion.**
- Allow users to request exemption from prerequisite.

**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.

25

- Allow users to add external training. 
- Delegate approval process of external training to user's manager.
- Override LO Availability**
- Allow users to print certificate upon completion.
- Allow users to request exemption from prerequisite.**

# 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.

Allow users to request exemption from prerequisite.

Allow training items to recur ignoring the recurrence setting on training level. **26**

Users are required to complete the minimum credits for all child sections in order for credits to be counted towards the parent section.

Change tracking unit from credit to  

**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.

Allow users to request exemption from prerequisite.

Allow training items to recur ignoring the recurrence setting on training level.

Users are required to complete the minimum credits for all child sections in order for credits to be counted towards the parent section. **27**

Change tracking unit from credit to  

**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.

Allow training items to recur ignoring the recurrence setting on training level.

Users are required to complete the minimum credits for all child sections in order for credits to be counted towards the parent section.

Change tracking unit from credit to   **28**

Display a warning for Certification Owners before they approve this certification for completion

Display a warning for Certification Owners before they deny this certification for completion

**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.

Change tracking unit from credit to  

Display a warning for Certification Owners before they approve this certification for completion. **29**

Display a warning for Certification Owners before they deny this certification for 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.

Change tracking unit from credit to  

Display a warning for Certification Owners before they approve this certification for completion

Display a warning for Certification Owners before they deny this certification for completion

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

Display a warning for Certification Owners before they approve this ce

Display a warning for Certification Owners before they deny this certifi

**PREREQUISITES**  **31**

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

**Search for training**

Online Class  Quick Course  Event  Curriculum  L

Title  Description

ng Material  Video  Online Content  Certification

English (US) **32** **Search** 

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

**Search for training**

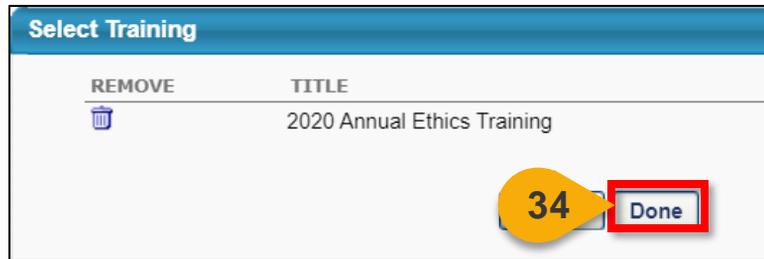
Title  Description  English (US)  **Search** 

 **33** **Ethics Training** Online Class | Defense Threat Reduction Agency (DTRA) | 2 Hours 2 Minutes

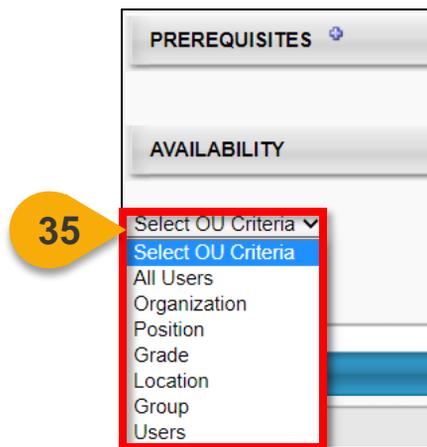
The purpose of this course is to review ethics issues specifically for financial disclosure filers and supervisors. We will review the sources of ethics rules, go over lessons learned from some ethic failures and test your knowledge with ten scenarios.

# Create Certifications (Cont.9)

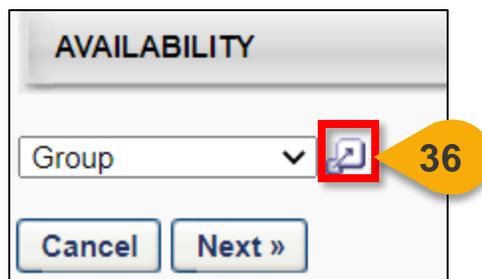
**Step 34:** Click **Done** to close the window and add the course as a Prerequisite.



**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.

**Search Group**

Title:  ID:

Title	ID
 <b>Federal Groups</b>	Federal_Groups
 <b>Hosted Groups</b>	Hosted_Groups
 <b>Other</b>	Other_Groups

37

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

Title	ID
 <b>Federal Groups</b>	Federal_Groups
 <b>Hosted Groups</b>	Hosted_Groups

38

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

**AVAILABILITY**

Group  

 All users in Group: Federal Employees (FO\_Employees)

 **Next »**

39

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

**Framework**

**Framework**

TEST 

40

# Create Certifications (Cont.11)

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

The screenshot shows a dialog box titled "Add Section". It contains a "Title:" label followed by a text input field. This field is highlighted with a red rectangular box. To the right of the box is a yellow callout bubble with the number "41a" and an arrow pointing to the input field. Below the title field is the label "Credits Required:" followed by two input fields: "Min: 0" and "Max: 0".

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

The screenshot shows the "Add Section" dialog box. The "Credits Required:" label and the two input fields for "Min: 0" and "Max: 0" are highlighted with a red rectangular box. A yellow callout bubble with the number "41b" and an arrow points to this area. At the bottom right of the dialog box are "OK" and "Cancel" buttons.

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

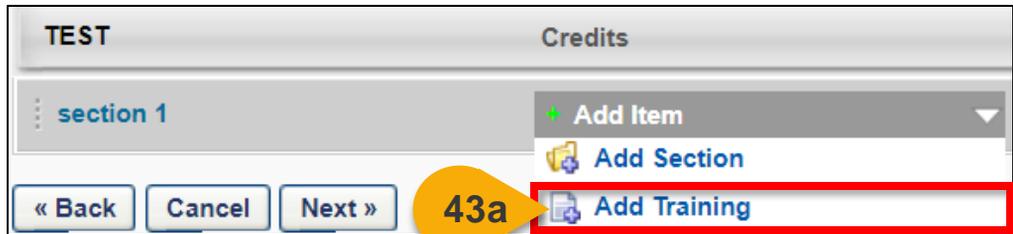
The screenshot shows the "Add Section" dialog box. The "OK" button at the bottom right is highlighted with a red rectangular box. A yellow callout bubble with the number "41c" and an arrow points to the "OK" button.

**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.

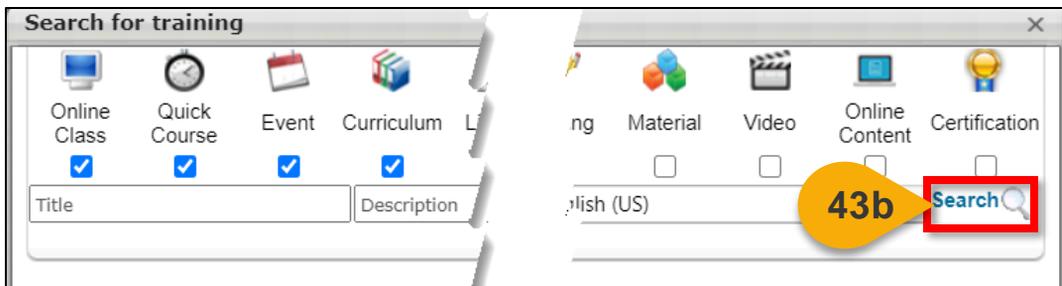
The screenshot shows a table with two columns: "TEST" and "Credits". The "TEST" column contains a row with "section 1" and a vertical ellipsis icon to its left. The "Credits" column contains a row with a red-bordered button labeled "Add Item" and a small downward-pointing arrow to its right. A yellow callout bubble with the number "42" and an arrow points to the "Add Item" button.

# 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.

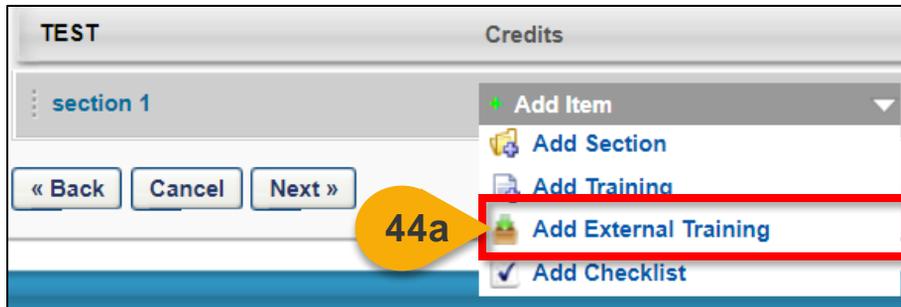


**Step 43d:** Click **Done** to close the popup window.



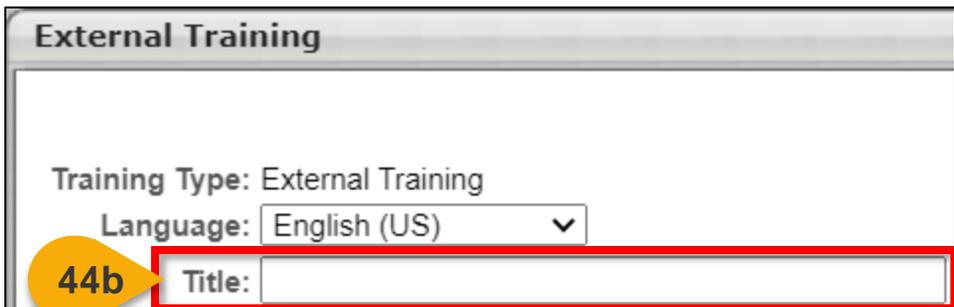
# Create Certifications (Cont.13)

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



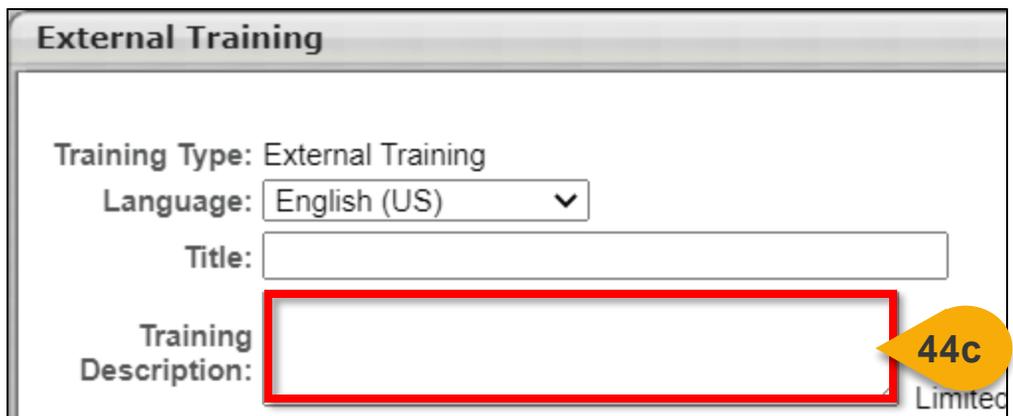
The screenshot shows a 'TEST' interface with a 'Credits' section. A dropdown menu is open, showing options: '+ Add Item', 'Add Section', 'Add Training', 'Add External Training', and 'Add Checklist'. The 'Add External Training' option is highlighted with a red box. A yellow callout bubble labeled '44a' points to this option. Below the dropdown are buttons for '« Back', 'Cancel', and 'Next »'.

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



The screenshot shows the 'External Training' form. The 'Training Type' is set to 'External Training' and the 'Language' is 'English (US)'. The 'Title' field is highlighted with a red box. A yellow callout bubble labeled '44b' points to this field.

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



The screenshot shows the 'External Training' form. The 'Training Type' is 'External Training' and the 'Language' is 'English (US)'. The 'Title' field is empty. The 'Training Description' field is highlighted with a red box. A yellow callout bubble labeled '44c' points to this field. The text 'Limited' is visible at the bottom right of the form.

# Create Certifications (Cont.14)

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

Training Type: External Training  
Language: English (US) ▾  
Title:   
Training Description:  Limited to 1000 characters  
**Institution:**

44d

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

Training Description:  Limited to 1000 characters  
Institution:   
Training Dates: From   To    
Training Hours: 0 Hours 0 Minutes

44e

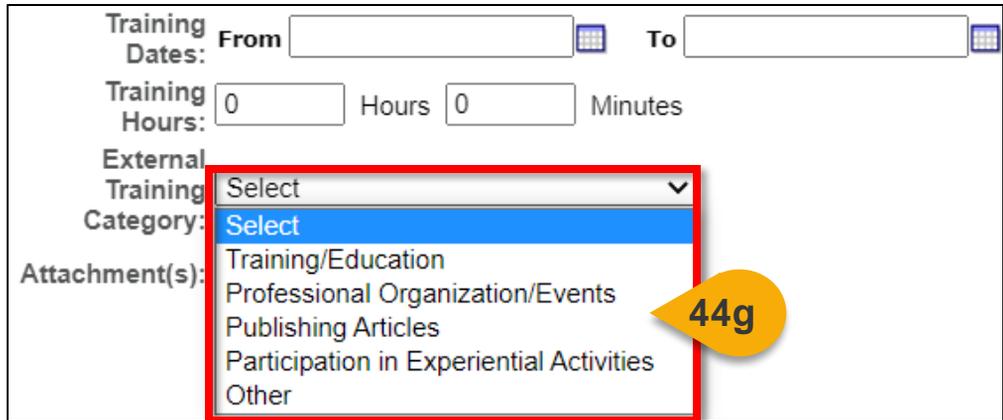
**Step 44f:** Enter the training hours for this course in the **Training Hours** field.

Training Description:  Limited to 1000 characters  
Institution:   
Training Dates: From   To    
Training Hours: 0 Hours 0 Minutes

44f

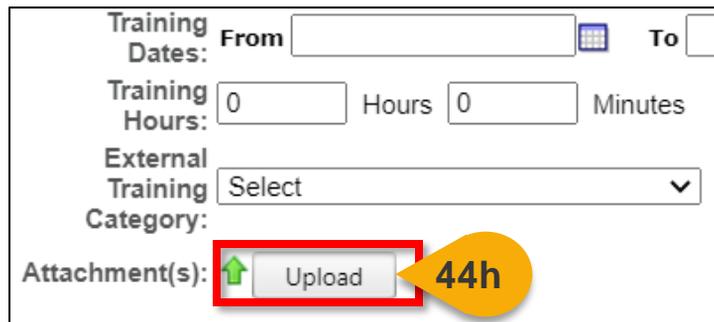
# Create Certifications (Cont.15)

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



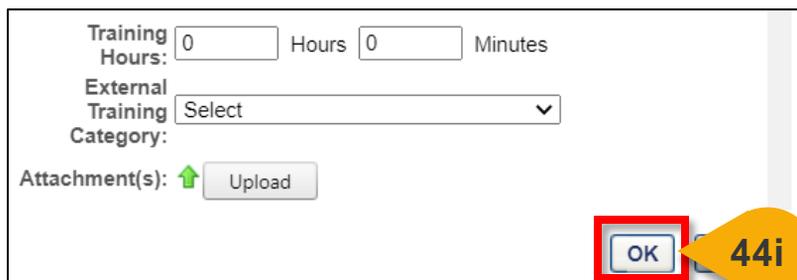
The screenshot shows a form with the following fields: Training Dates (From and To), Training Hours (0) and Minutes (0), External Training Category (a dropdown menu), and Attachment(s). The dropdown menu is open, showing options: Select, Training/Education, Professional Organization/Events, Publishing Articles, Participation in Experiential Activities, and Other. A red box highlights the dropdown menu, and a yellow callout bubble labeled '44g' points to it.

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



The screenshot shows the same form as in Step 44g, but the External Training Category dropdown is now closed and set to 'Select'. The Attachment(s) field has a green upload icon and an 'Upload' button. A red box highlights the 'Upload' button, and a yellow callout bubble labeled '44h' points to it.

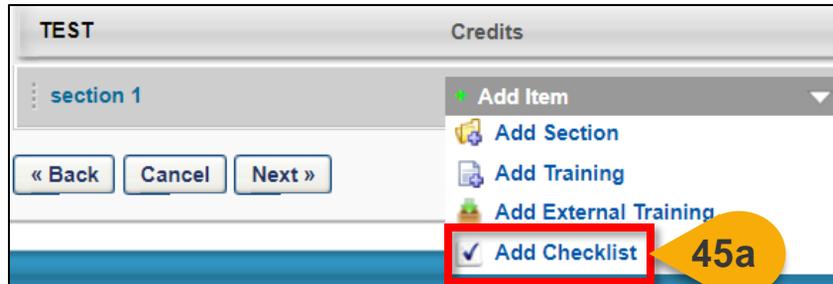
**Step 44i:** Click **OK** to save your changes and the External Training.



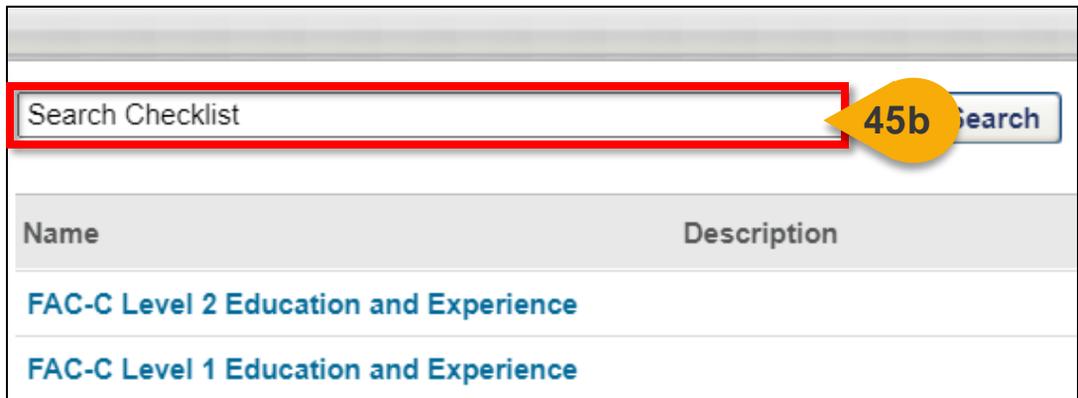
The screenshot shows the same form as in Step 44h, but the 'Upload' button is now disabled. The Attachment(s) field has a green upload icon and a disabled 'Upload' button. The 'OK' button is highlighted with a red box, and a yellow callout bubble labeled '44i' points to it.

# Create Certifications (Cont.16)

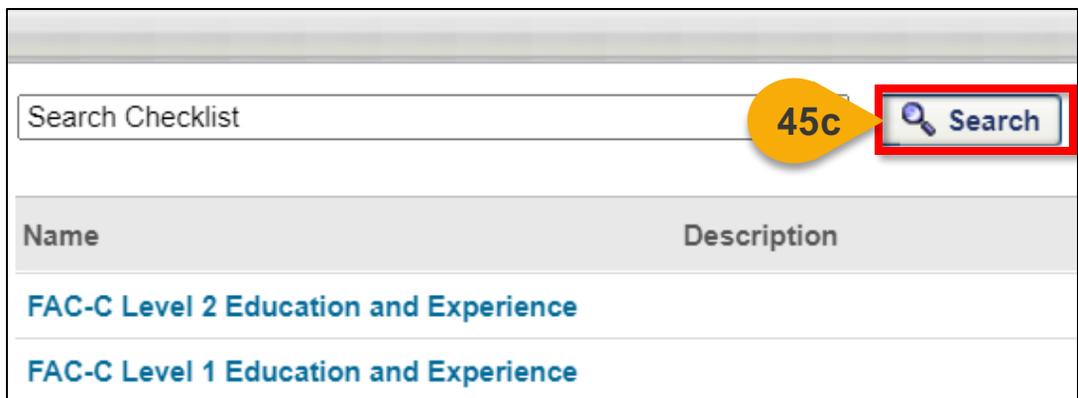
**Step 45a:** Click **Add Checklist** to add a Checklist to the section.



**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.

Name	Description
FAC-C Level 2 Education and Experience	
FAC-C Level 1 Education and Experience	

**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.

TASK AID TEST	Sequence	Credits	Options
Sec.1	Min=0 Max=10	+ Add Item	
<input checked="" type="checkbox"/> FAC-C Level 1 Education and Experience	1	0	

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

Define training item validity:

- No validity period defined. Training items are always valid.
- On the period start date, this item is completed within the pa (if this is checked, item will be given credit automatically at s

# 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.

**Validity Period Options**

Define training item validity:

- No validity period defined. Training items are always valid.
- On the period start date, this item is completed within the past  days   
(if this is checked, item will be given credit automatically at start of period.)
- By the Certification Period Expiration Date, this is valid if completed within the past

48

**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.

**Validity Period Options**

Define training item validity:

- No validity period defined. Training items are always valid.
- On the period start date, this item is completed within the past  days   
(if this is checked, item will be given credit automatically at start of period.)
- By the Certification Period Expiration Date, this is valid if completed within the past   
(will be ignored if an expiration date is not set for the period.)

49

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

- By the Certification Period Expiration Date, this is valid if completed within the past   
(will be ignored if an expiration date is not set for the period.)
- The item is completed on or after the indicated date :

50

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

- By the Certification Period Expiration Date, this is valid if completed within the past  days   
(will be ignored if an expiration date is not set for the period.)
- The item is completed on or after the indicated date :

51

# 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.

TEST	Sequence	Credits
Test (to be deleted)	Min=0 Max=0	+ Add Item
2020 Annual Ethics Training	1	0
FAC-C Level 2 Education and Experience	1	0

**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.

TEST	Sequence	Credits
Test (to be deleted)	Min=0 Max=0	+ Add Item
2020 Annual Ethics Training	1	0
FAC-C Level 2 Education and Experience	1	0

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

« Back   Cancel   **Next >**

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

**Scheduling**

Scheduling  
Setup certification period schedule and requirement. Certification periods should not overlap with each other.

**CREATE CERTIFICATION SCHEDULE**

Select Period Type:

# 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.  
(e.g. *Every year on April 15th*)

55c

**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.  
(e.g. *180 days after user's initial certification and every 180 days thereafter*)

55d

**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.  
(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*)

55e

**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.

Certification Period Title :   
Period Required Credits :   
Total Maximum Credits for Selected Sections : 0.0

57

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

Certification Period Title :   
Period Required Credits :   
Total Maximum Credits for Selected Sections : 0.0

58

**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.

Certification Period Title :   
Period Required Credits :   
Total Maximum Credits for Selected Sections : 0.0

Details  
 Verification required upon completion of period

59

**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.

Select Applicable Sections :

Test (Maximum Credits: 0)

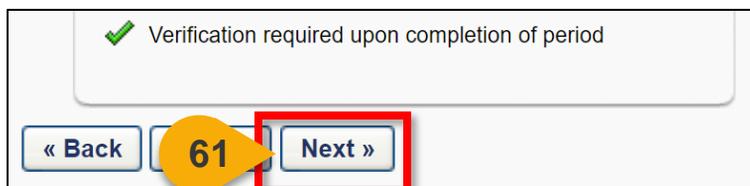
60

Select

Cancel

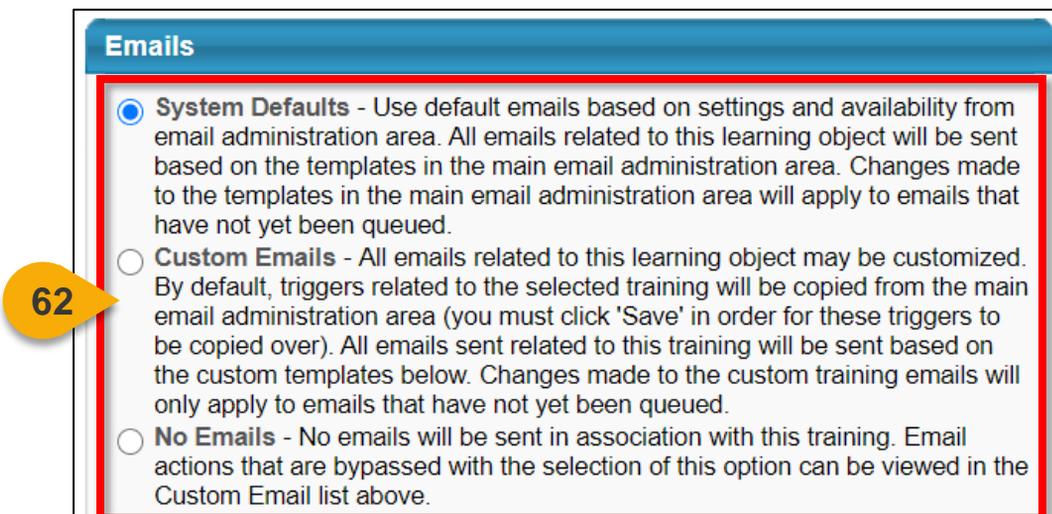
# Create Certifications (Cont.22)

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



A screenshot of a user interface showing a verification message: "Verification required upon completion of period" with a green checkmark icon. Below the message are three buttons: "« Back", "Next »", and a partially visible "Cancel" button. The "Next »" button is highlighted with a red border, and a yellow callout bubble with the number "61" points to it.

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



A screenshot of the "Emails" configuration page. The page title is "Emails". There are three radio button options, each with a description. The first option, "System Defaults", is selected and highlighted with a red border. A yellow callout bubble with the number "62" points to the "System Defaults" option.

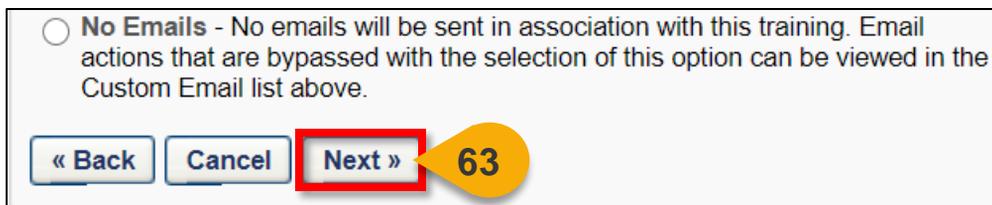
**System Defaults** - Use default emails based on settings and availability from email administration area. All emails related to this learning object will be sent based on the templates in the main email administration area. Changes made to the templates in the main email administration area will apply to emails that have not yet been queued.

**Custom Emails** - All emails related to this learning object may be customized. By default, triggers related to the selected training will be copied from the main email administration area (you must click 'Save' in order for these triggers to be copied over). All emails sent related to this training will be sent based on the custom templates below. Changes made to the custom training emails will only apply to emails that have not yet been queued.

**No Emails** - No emails will be sent in association with this training. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above.

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.



A screenshot of a user interface showing the "No Emails" option selected. The text reads: "No Emails - No emails will be sent in association with this training. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above." Below the text are three buttons: "« Back", "Cancel", and "Next »". The "Next »" button is highlighted with a red border, and a yellow callout bubble with the number "63" points to it.

# 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.

### Confirm

Title: Test  
Family: Federal Certifications  
Category: FAC-C Level 1  
Description: EFqwf  
Language: English (US)  
Version: 1.0  
Owners: FAI Admin (FAI\_Admin)

**DETAILS**

✔ If all requirements are completed prior to certification registration, use Last training item completion date as Certified Date.

**CERTIFICATE REQUIREMENTS**

#### test

Required Credits: 1  
Due: None  
Expire: None  
✔ Verification required upon completion of period

64 Save Cancel

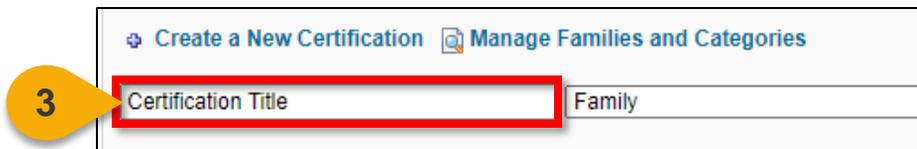
# Edit a Certification

*When you want to modify a Certification...*

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



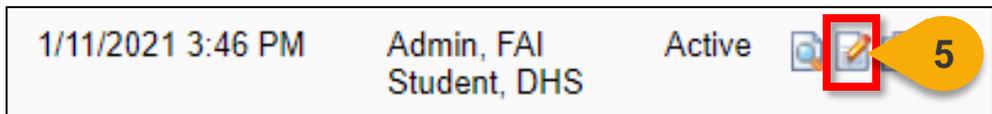
**Step 3:** Type in the name of the Certification in the **Certification Title** field. Alternatively, you can use the other search criteria available on this page.



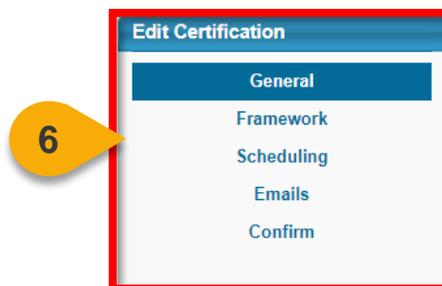
**Step 4:** Click **Search**.



**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.



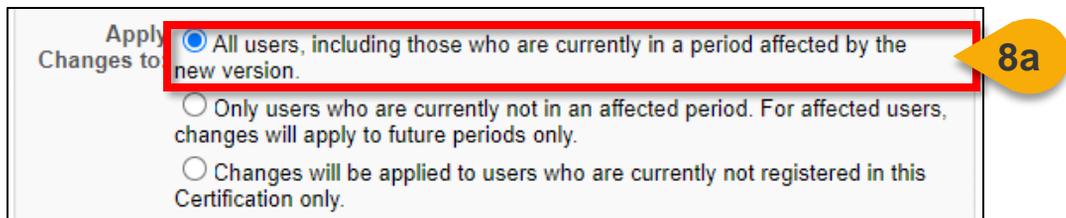
# Edit a Certification (Cont.1)

**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.



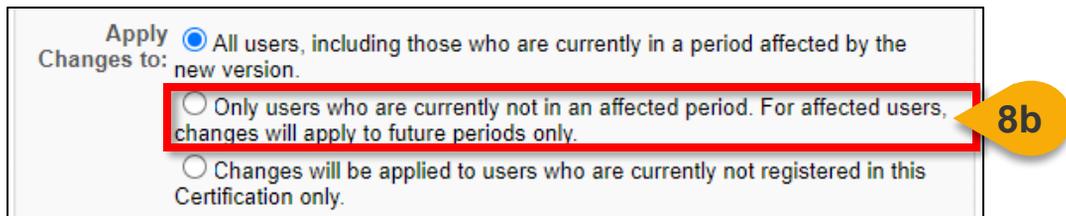
Select OU Criteria ▾  
All users in Organization: Federal Organizations (9A)  
**Save** Cancel Next »

**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.



Apply Changes to:  All users, including those who are currently in a period affected by the new version. **8a**  
 Only users who are currently not in an affected period. For affected users, changes will apply to future periods only.  
 Changes will be applied to users who are currently not registered in this Certification only.

**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.



Apply Changes to:  All users, including those who are currently in a period affected by the new version.  
 Only users who are currently not in an affected period. For affected users, changes will apply to future periods only. **8b**  
 Changes will be applied to users who are currently not registered in this 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.

- Apply Changes to:
- All users, including those who are currently in a period affected by the new version.
  - Only users who are currently not in an affected period. For affected users, changes will apply to future periods only.
  - Changes will be applied to users who are currently not registered in this Certification only.

8c

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

Comments:  (Max. = 250 Characters.)

9

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

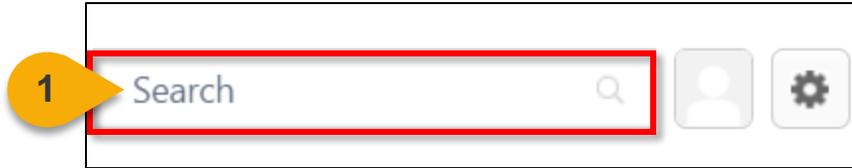
Comments:  (Max. = 250 Characters.)

10

# Request and Manage a Certification

*When you want to request a Certification...*

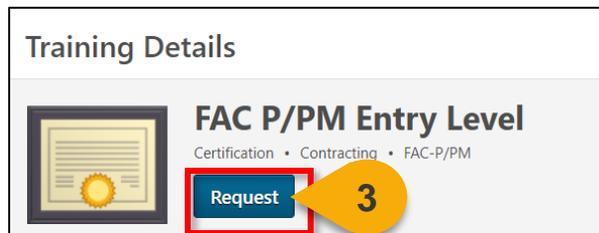
**Step 1: In Global Search, type in the Certification you wish to request and click the Magnifying Glass.**



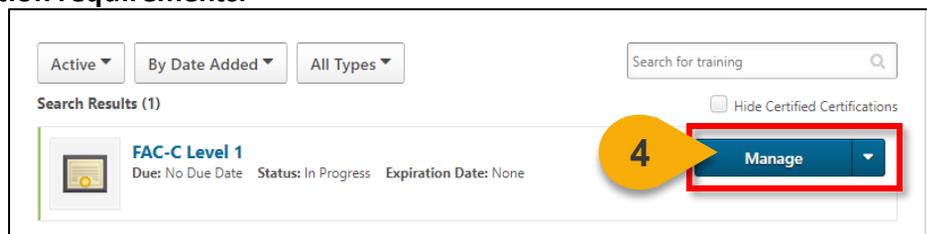
**Step 2: Click on the Certification you'd like in the results.**



**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.**

**Certification Details**

**Title:** CLA - Program and Project Management  
The Federal Acquisition Certification (P/PMs) are critical to project success. They are essential functional and technical management professionals. They are responsible for the program and Project Managers.

**Description:** The FAC-P/PM focuses on the certification program and project management professionals. They are responsible for the program and Project Managers.

**Family:** Contracting

**Category:** FAC-COR

**6 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.**

**Progress Report**

View Period: FY 2021-2023

**Required:** 80.00 CLP      **Earned:** 0.00 CLP

Training (Required CLP: Min = 80.00, Max = 80.00 / Acquired CLP: 0.00)	Acquired
CSOD Training (Required CLP: Min = 0.00, Max = 80.00 / Acquired CLP: 0.00)	Acquired
FAC 049 Section 508: What Is It and Why Is it Important to You?	0.0
FAC 048 The GSA MAS Program: Buying Services Through GSA Schedules	0.0
FAC 038 How to Integrate Green into Acquisition	0.0

[Close](#)

# Revoke a Certification

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

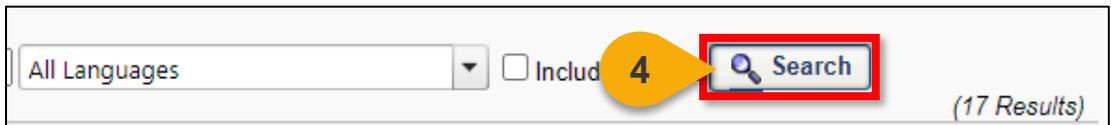
**Steps 1 & 2:** Hover over the **Certifications** tab and click **Certification Management**.



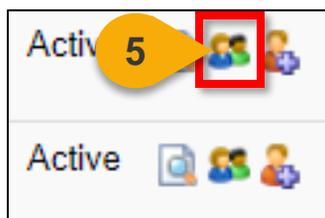
**Step 3:** Type in the name of the Certification in the **Certification Title** field. Alternatively, you can use the other search criteria available on this page.



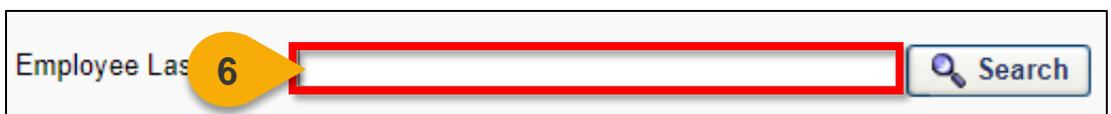
**Step 4:** Click **Search**.



**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**.

Employee Last Name:   7

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

Version	Current Status	Options
3.0	In Progress	 

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

**Details**

Title: FAC-C Level 1

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

**Revoke Certification** [X]

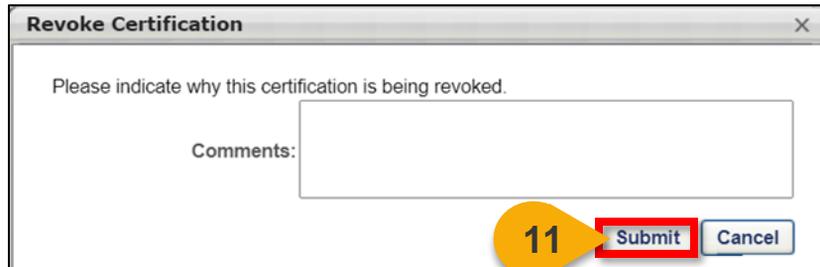
Please indicate why this certification is being revoked.

 10

# 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.



Revoke Certification

Please indicate why this certification is being revoked.

Comments:

11 **Submit** Cancel

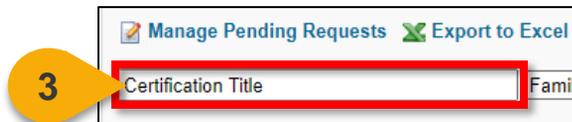
# Put a Certification on Hold

*When you want to put a User's Certification on hold...*

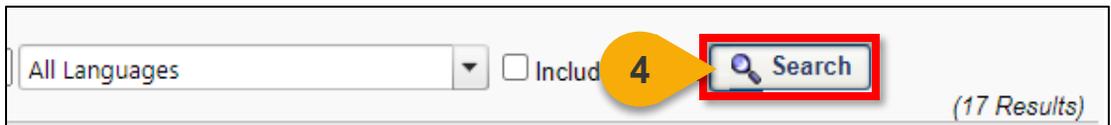
**Steps 1 & 2:** Hover over the **Certifications** tab and click **Certification Management**.



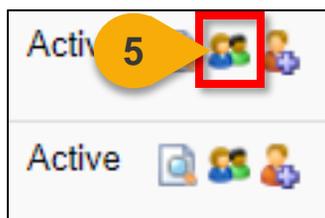
**Step 3:** Type in the name of the Certification in the **Certification Title** field. Alternatively, you can use the other search criteria available on this page.



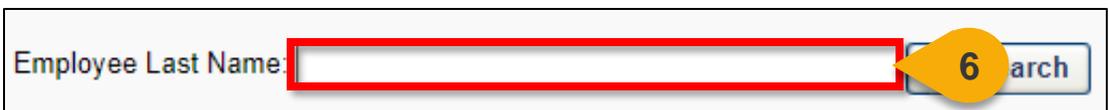
**Step 4:** Click **Search**.



**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**.

Employee Last Name:   **Search**

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

Version	Current Status	Options
3.0	In Progress	 

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

**Details**

Rev **9** **Place On Hold** **Progress Report**

Title: FAC-C Level 1

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

**Place On Hold**

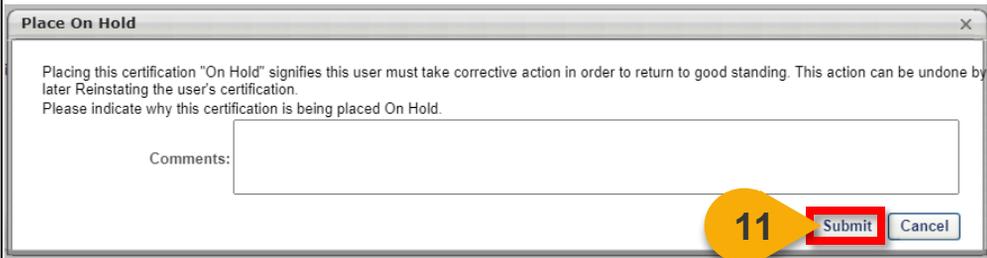
Placing this certification "On Hold" signifies this user must take corrective action in order to return to good standing. This action can be undone by later Reinstating the user's certification.  
Please indicate why this certification is being placed On Hold.

**10**

**Submit** **Cancel**

# 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 Reinstatement the Certification where the On Hold option was previously.



**Place On Hold**

Placing this certification "On Hold" signifies this user must take corrective action in order to return to good standing. This action can be undone by later Reinstating the user's certification.  
Please indicate why this certification is being placed On Hold.

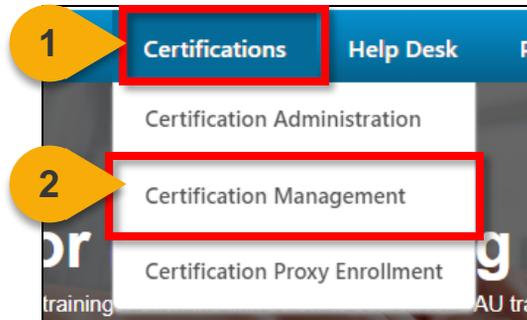
Comments:

**11**

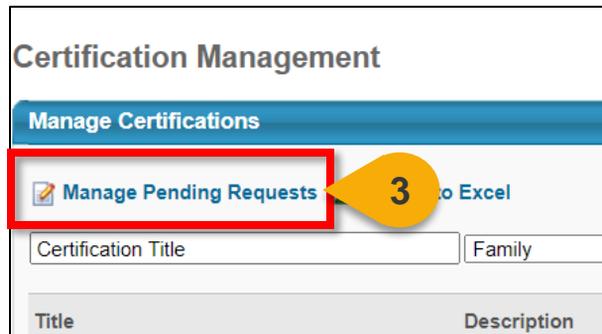
# Approve or Deny External Training Request

*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.

Requested By	Organizational Unit	Requested Date	Request Type	Certification Title	Options
	Federal Organizations (Organization) Virna Winters (Manager)	1/15/2021 4:03 PM	External Training	CLA - Contracting (FAC-C All Levels	

# 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.

Training Description:	Acquisition Topics
Institution:	Acquisition Topics
Training Dates:	From 1/6/2021 To 2/3/2021
Training Hours:	45 Hours 0 Minutes
External Training Category:	Training/Education
Attachment(s):	 Attachments
	 <a href="#">blankdoc.docx</a>
Apply Training To:	External Training 

**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.

Category:	
Attachment(s):	 Attachments
	 <a href="#">blankdoc.docx</a>
Apply Training To:	External Training 
Requested CLP	45.00
Decision	-- Select -- 

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

Category:	
Attachment(s):	 Attachments
	 <a href="#">blankdoc.docx</a>
Apply Training To:	External Training 
Requested CLP	45.00
Decision	-- Select -- 

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

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

Requested CLP	45.00
Decision	Approve 
Comments	-- Select -- Approve Deny



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

Decision	Approve 
Comments	<input type="text"/>



**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.

Decision	Approve 
Comments	<input type="text"/>





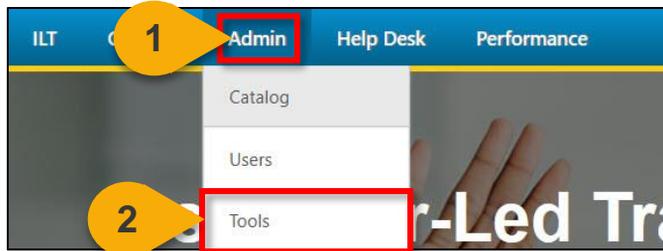
# Checklist Management



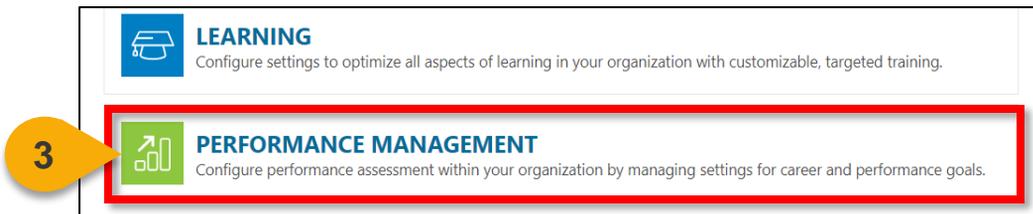
# View and Edit Checklists

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

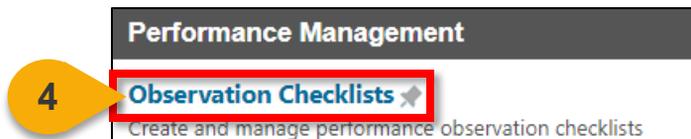
**Steps 1 & 2:** Hover over the **Admin** tab, then select **Tools**.



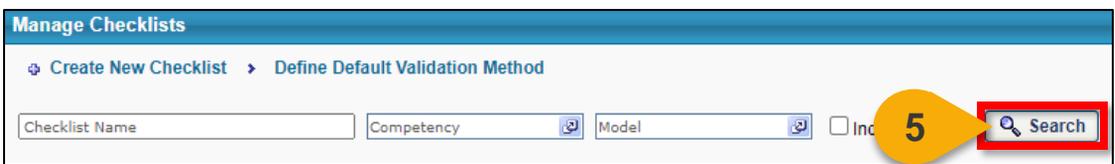
**Step 3:** Select **Performance Management**.



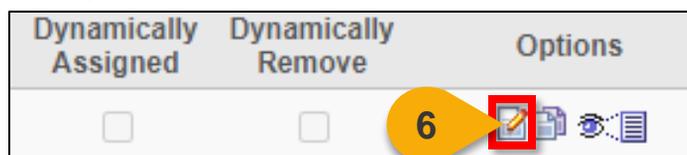
**Step 4:** Click on **Observation Checklists**.



**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.

Validation Changes:  Lock validation dates for completed checklists

Checklist Name:  Display Model Name **7**

Define Name

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

Validation Changes:  Lock validation dates for completed checklists

Checklist Name:  Display Model Name

Define Name **8**

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

Define Description:  Display Model Description **9**

Define Description

**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.

Define Description:  Display Model Description

Define Description **10**

# 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.

11

Checklist Display:  Expand checklist items by default

Allow Notes:  Manager  Verifier  User

**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.

12

Checklist Display:  Expand checklist items by default

Allow Notes:  Manager  Verifier  User

**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.

13

Attachments: Select who can add attachment to a user's checklist

Manager  Verifier  User

Add Attachment ↕

**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.

14

Attachments: Select who can add attachment to a user's checklist

Manager  Verifier  User

Add Attachment ↕

# 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.

15



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.

Display Options:  Numeric

16

Text

Numeric and Text

**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.

Display Options:  Numeric

Text

17

Numeric and Text

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

Display Options:  Numeric

Text

18

Numeric and Text

# 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.

Rating Options:  Validate the item when the competency target is reached  
 **Require the validator to check off the competency item**  
 Require the competency target as the minimum rating

19

**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.

20  **Display the Rating Scale in the tabbed panel at the top of the checklist form.**  
 Hide the results from the user  
VALIDATION METHOD 

**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.

Display the Rating Scale in the tabbed panel at the top of the checklist form.  
21  **Hide the results from the user**  
VALIDATION METHOD 

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

MODIFICATION HISTORY

Save Cancel **Next »**

22

# View and Edit Checklists (Cont.5)

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

VALIDATION

Allow User's Manager to validate

Allow User's Manager to define additional users to validate

Select OU Criteria ▾

All users in Group: FAC P/PM Verifiers - Experience (FAC PPM\_Verifiers\_Exp)  Allow user(s) to define additional verifiers

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

VALIDATION

Allow User's Manager to validate

Allow User's Manager to define additional users to validate

**Select OU Criteria ▾**

All users in Group: FAC P/PM Verifiers - Experience (FAC PPM\_Verifiers\_Exp)  Allow user(s) to define additional verifiers

**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.

VALIDATION

Allow User's Manager to validate

Allow User's Manager to define additional users to validate

Group ▾

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

	DTRA Groups	DTRA_Groups	Defense Acq
	Federal Groups	Federal_Groups	Defense Acq
	Hosted Groups	Hosted_Groups	Defense Acq

# View and Edit Checklists (Cont.6)

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

Title	ID
FAC P/PM Verifiers - Experience	PM_Verifiers_Exp
FAC-C Verifiers- Education	FACC_Verifiers_Ed

27

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

**APPROVAL**

Require User's Manager approval

« Back Save Cancel **Next »**

28

**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.

**Email**

- System Defaults** - Use default emails based on settings and availability from email administration area. All emails related to this checklist will be sent based on the templates in the main email administration area. Changes made to the templates in the main email administration area will apply to emails that have not yet been queued.
- Custom Emails** - All emails related to this checklist may be customized. By default, triggers related to the selected checklist will be copied from the main email administration area. All emails sent related to this checklist will be sent based on the custom templates below. Changes made to the custom checklist emails will only apply to emails that have not yet been queued.
- No Emails** - No emails will be sent in association with this checklist. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above.

29

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

**No Emails** - No emails will be sent in association with this checklist. Email actions that are bypassed with the selection of this option can be viewed in the Custom Email list above.

« Back Save Cancel **Next »**

30

# 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.

**Description:**

Please follow the instructions below to attach documents for this requirement.

1. Click the **Attachments** tab
2. Choose the file you wish to upload.
3. Click **Add**. You can upload up to 3 files.

Checklist Type: Learning Object

31

Save

Cancel

# Forms



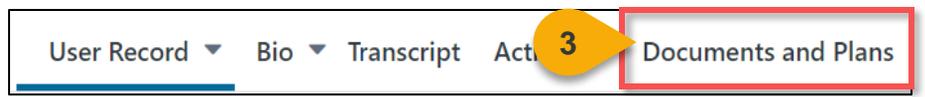
# View Submitted Forms

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

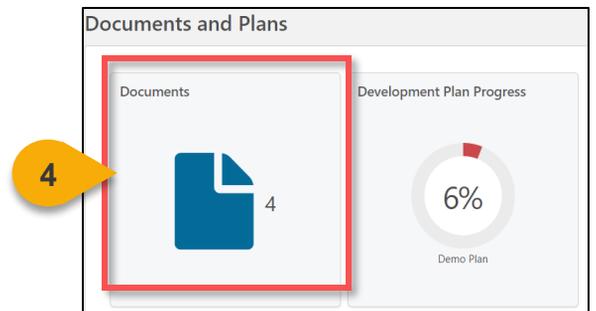
**Steps 1 & 2: Hover over Home and click Universal Profile.**



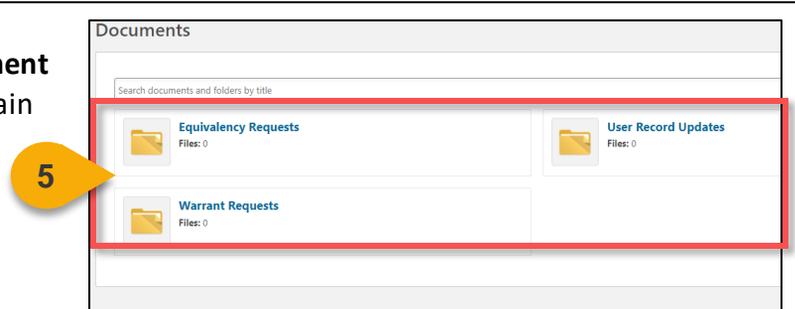
**Step 3: Click on Documents and Plans.**



**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.

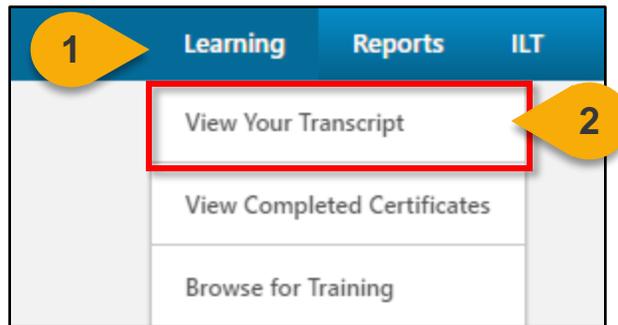
**User Record Updates:**  
Contains User Record  
Update Forms you have  
submitted.

# Request Education/Experience Verification

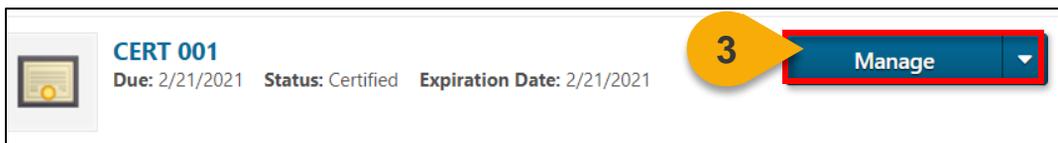
*When you need to submit an Education or Experience Verification Checklist for a Certification...*

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

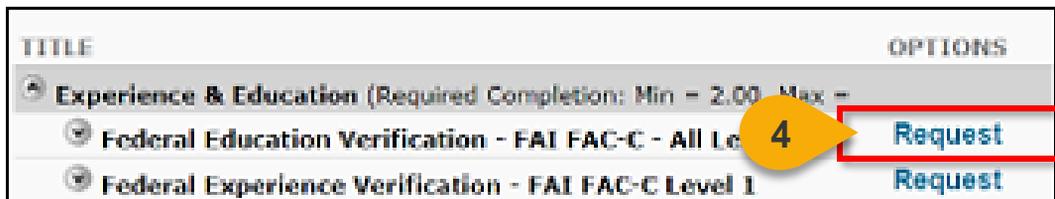
**Steps 1 & 2:** Hover over the **Learning** tab and click **View Your Transcript**.



**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.

**Federal Education Verification - FAI FAC-C - All Levels**

Observation Checklist

Details

Description: Please follow the instructions below to attach documents for this requirement.

1. Click the **Attachments** tab
2. Choose the file you wish to upload.
3. Click **Add**. You can upload up to 3 files.

**5** Request Close

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

CERTIFICATION	OPTIONS
<b>TITLE</b>	
Experience & Education (Required Completion: Min = 1.00, Max = 1.00 / Ac	
Federal Experience Verification - FAI FAC P/PM Senior Level	<b>6</b> View Checklist

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

My Checklists

Birdie Winters Checklist Report

**7** Checklist Summary Progress All Competencies

Show Completed

Name	Status	Rating/Score	Progress
Federal Experience Verification - FAI FAC P/PM Entry Level	Not Started	-	0%
Federal Experience Verification - FAI FAC P/PM Senior Level	Not Started	-	0%

« Back

# Request Education/Experience Verification (Cont.2)

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

Checklist Summary

Checklist Summary

Federal Experience Verificatio...

Federal Education Verificatio... 8

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

Checklist Summary

Federal Experience Verificatio...

Federal Experience Verificatio...

9 Rating Scale Attachments

Score	Rating
0	Does not meet criteria
1	Meets Criteria

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

Overview

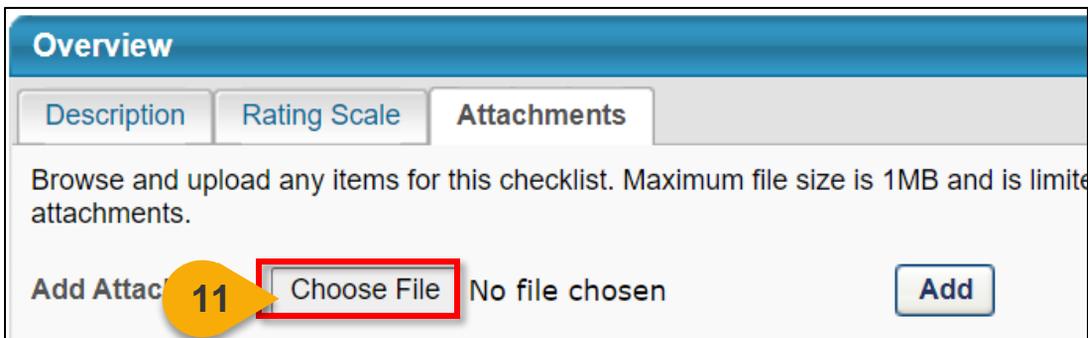
Description Rating S 10 Attachments

Browse and upload any items for this checklist. Maximum file size is 1MB and

Add Attachment: Choose File No file chosen Add

# Request Education/Experience Verification (Cont.3)

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



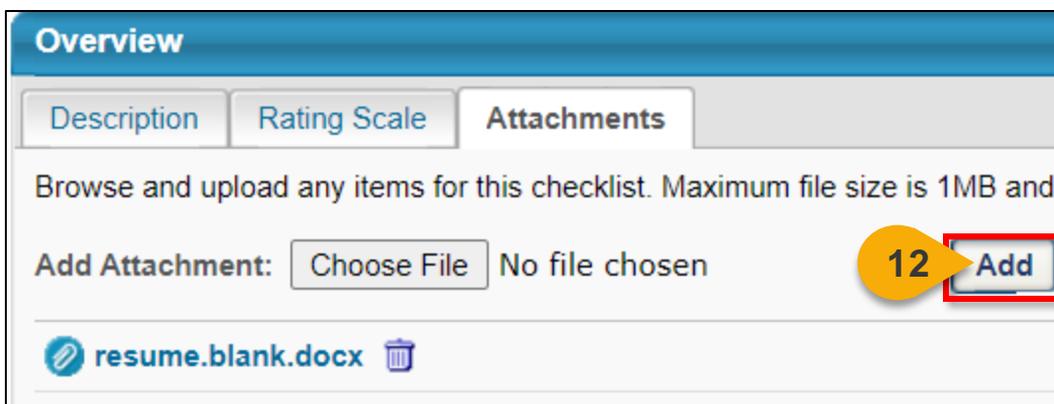
**Overview**

Description Rating Scale **Attachments**

Browse and upload any items for this checklist. Maximum file size is 1MB and is limited to 3 attachments.

Add Attachments **11** Choose File No file chosen **Add**

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



**Overview**

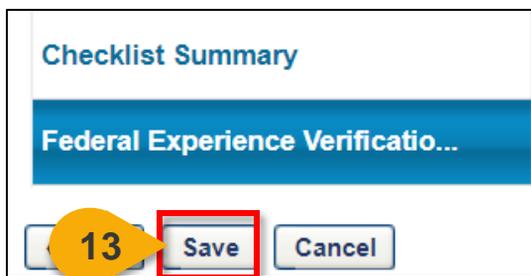
Description Rating Scale **Attachments**

Browse and upload any items for this checklist. Maximum file size is 1MB and is limited to 3 attachments.

Add Attachment: Choose File No file chosen **12** **Add**

 resume.blank.docx 

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



**Checklist Summary**

**Federal Experience Verificatio...**

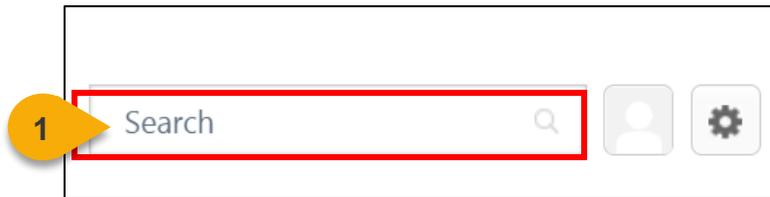
**13** **Save** **Cancel**

# Submit an Equivalency/Fulfillment Form

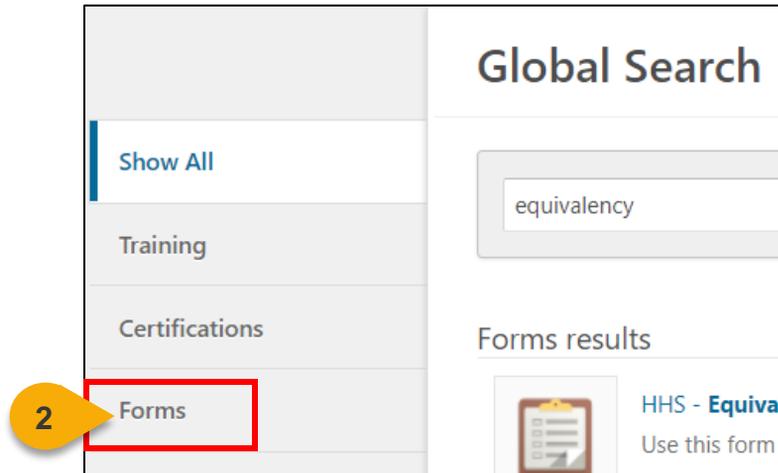
*When you want to request Equivalency or Fulfillment for a Course...*

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

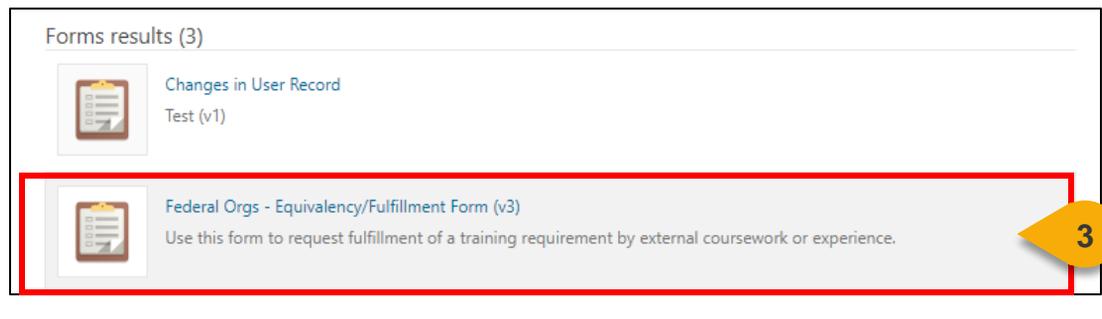
**Step 1:** Enter **Equivalency** in the Search box and click the Magnifying Glass.



**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.

**Equivalency & Fulfillment Request**  
Please provide the information below to indicate how you have fulfillment requirements for course equivalency.

**Please Select the Course You Would Like Equivalency For**

Select  **4**

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

**Please Select the Course You Would Like E**

Select 

✓ Select **Please List.**

**5** ACQ 370 (FED)

AQN PBA

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

**Equivalency & Fulfillment Request**  
Please provide the information below to indicate how you have fulfillment requirements for course equivalency.

**Please Select the Course You Would Like Equivalency For**

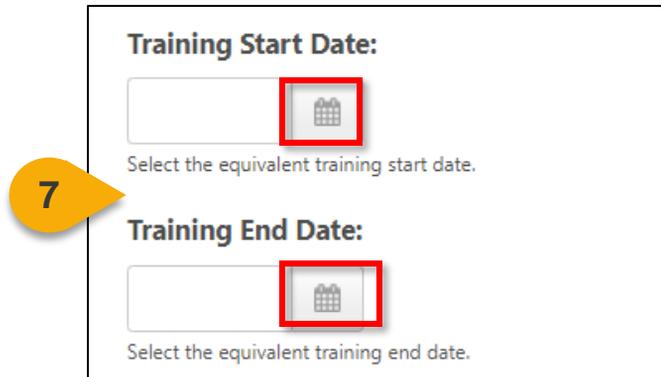
Select 

**If You Selected "Other", Please List.**

**6**

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

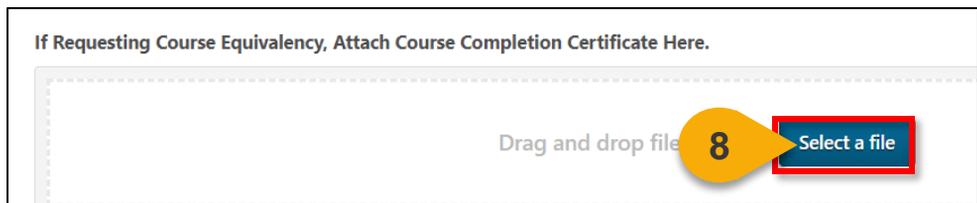
**Step 7:** Click the **calendar** icon to enter the Training Start and End dates.



**Training Start Date:**  
Select the equivalent training start date.

**Training End Date:**  
Select the equivalent training end date.

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



If Requesting Course Equivalency, Attach Course Completion Certificate Here.

Drag and drop file

Select a file

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



**Employee Remarks:**

2000 characters maximum.

Cancel Submit For Approval

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



10 Submit For Approval



# 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.

Development Plan

3

Create New Plan

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

A screenshot of the 'Create a Plan' form. The breadcrumb trail at the top reads 'Home > Snapshot > Dev Plan List > Create a Plan'. The main heading is 'Create a Plan'. Below it is the 'General Information' section. The 'Plan Title\*' field contains the text 'Management and Leadership Development'. The 'Description' field contains a rich text editor with a toolbar and the following text: 'Develop skills in the areas of program management and task delegation in order to improve leadership skills. This will be done by: - Shadowing Senior Associates - Taking internal and external training courses on mangement and leadership skills - Joining efforts on the job that allow for demonstration of program management'. A yellow callout bubble with the number '4' points to the 'Plan Title\*' field.

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

Development Objectives



There are no development objectives. Would you like to add one?

5

Add Objective

# Create an IDP (Cont. 1)

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

## Add Development Objective

Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

What skills would you like to develop?

6

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

## Add Development Objective

Development Objectives represent what you need to learn or do in order to complete your development plan.

Objective Title

What skills would you like to develop?

Category

Development Objectives

7

**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.**

### Learning and Development

8

Search For Learning

Find learning opportunities to help you achieve your objective.

Browse Recommended

Browse learning and development actions that are recommended for you.

Add Development Action

Create your own actions to make your objective happen.

**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**.

Learning and Development

**8a** Search For Learning Browse Recommended Add Development Action

Find learning opportunities to help you achieve your objective. Browse learning and development actions that are recommended for you. Create your own actions to make your objective happen.

**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.

TYPE

SUBJECT

DURATION

**8b**

**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.

TYPE

Curriculum

Event

External Content

Material

Online Class

Test

SUBJECT

DURATION

**8c**

# Create an IDP (Cont. 3)

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



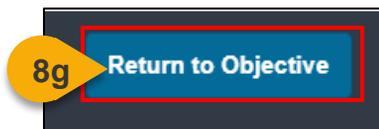
**Step 8e:** Select the **Add to Objective** link beneath any training you want to add. Multiple training courses can be selected.



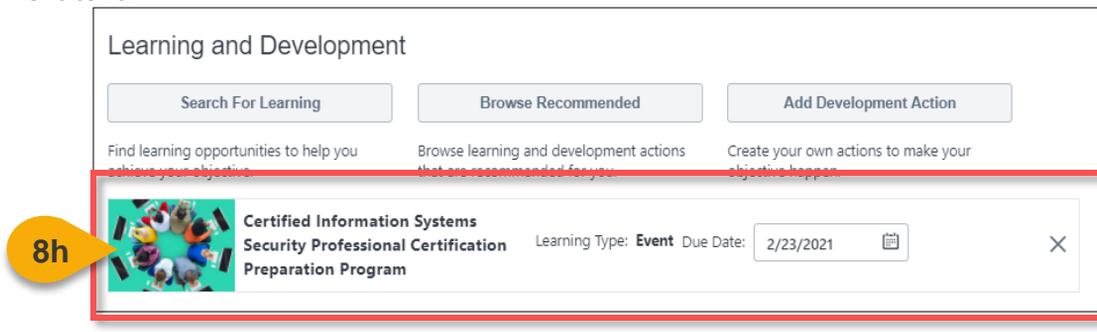
**Step 8f:** If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.



**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**.

Learning and Development

Search For Learning      Browse Recommended      **9a** Add Development Action

Find learning opportunities to help you achieve your objective.      Browse learning and development actions that are recommended for you.      Create your own actions to make your objective happen.

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

**Development Action**

Description\*

**9b**

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

Activity Type

Select...  
Outside Training  
Additional Learning  
Coaching/Mentoring  
On the Job  
Reading  
Shadowing

**9c**

**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.

Due Date\*

2/23/2021      **9d** 

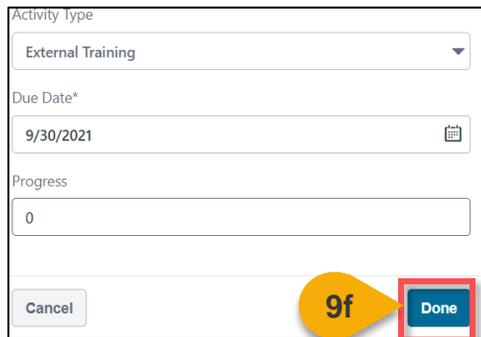
# Create an IDP (Cont. 5)

**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".



Progress  
0

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



Activity type  
External Training

Due Date\*  
9/30/2021

Progress  
0

Cancel Done

**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.

## Assignment

Select the criteria that defines who will be included in this assignment

10

Self Only

**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**.

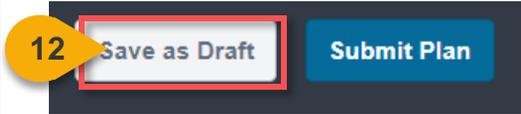
11

Designate this as the Primary Plan for assignees

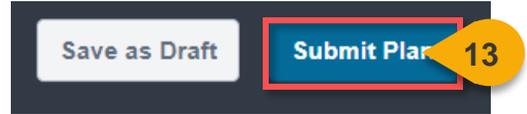
# Create an IDP (Cont. 6)

---

**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.

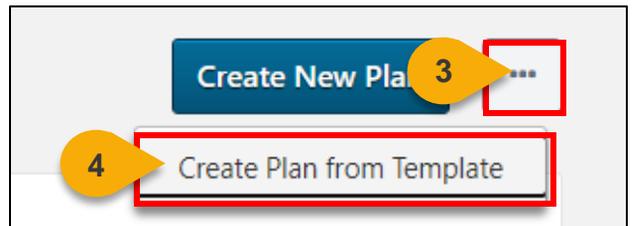
# Create an IDP from a Template

*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.

Development Plan Templates

Choose a template to create a development plan from.

Template	ID	Category	Date Created	Actions
Acquisition Professional Career Program eXpansion - Systems Engineer 080...	KFUNDHXTU	In Role/Current Job	10/30/20...	Preview <b>Apply Template</b>
Department of Homeland Security (DHS) Student Hire Internship Program	XJVFQIGOG	Intern Program Tra...	10/30/2020	Preview <b>Apply template</b>

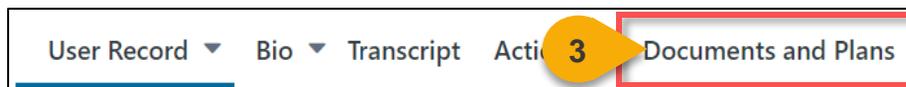
# Update IDP

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

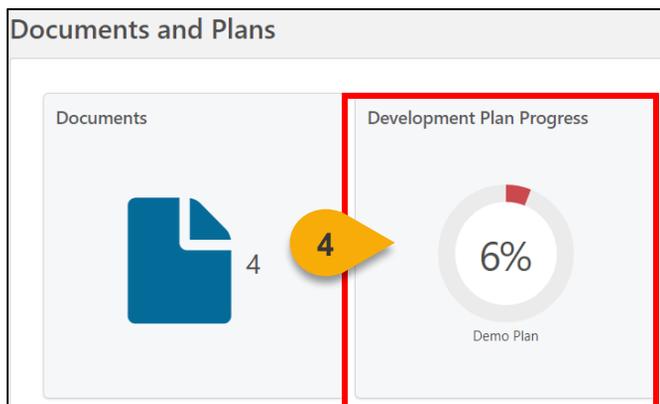
**Steps 1 & 2:** Hover over **Home** then navigate to **Universal Profile**.



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



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

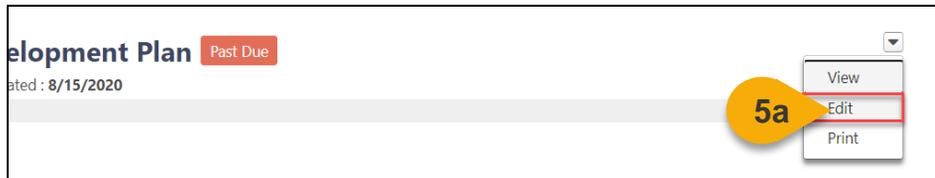


**Note:** You can also navigate to the IDP using the Performance tab and then clicking on Development Plans.

# Update IDP (Cont. 1)

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

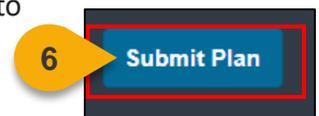
**Step 5a:** Select the dropdown icon **Edit** option next to the IDP to which you want to add a new Objective.



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



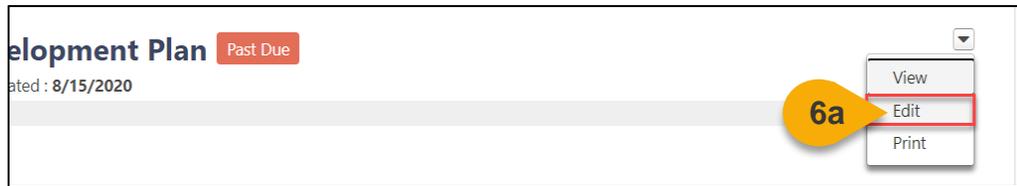
**Step 6:** Click on the **Submit Plan** button when you are ready to resubmit your plan for approval.



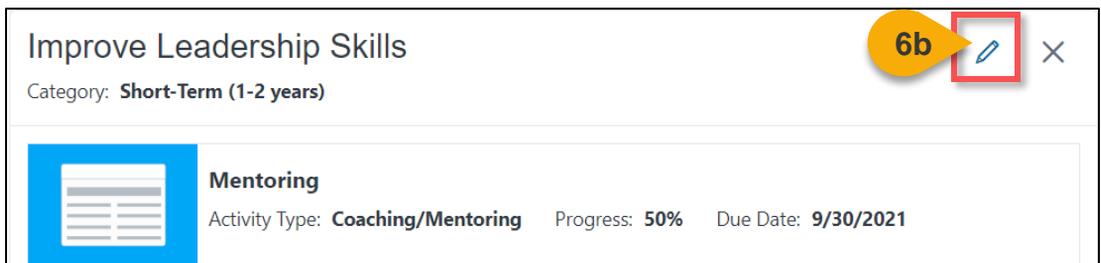
# Update IDP (Cont. 2)

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.

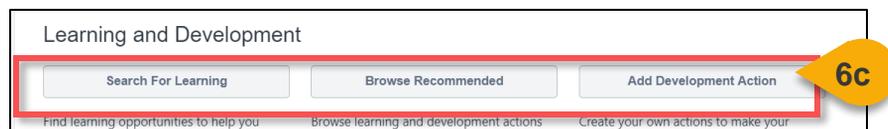
**Step 6a:** Select the dropdown icon **Edit** option next to the plan with the Objective you want to update.



**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.

Learning and Development

Search For Learning    Browse Recommended    Add Development Action

Find learning opportunities to help you achieve your objective.    Browse learning and development actions that are recommended for you.    Create your own actions to make your objective happen.

**Attend Leadership Conference in San Diego, CA**    Activity Type: **Outside Training**    Progress: **0%**    Due Date: **2/23/2021** **6d**

**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.

Learning and Development

Search For Learning    Browse Recommended    Add Development Action

Find learning opportunities to help you achieve your objective.    Browse learning and development actions that are recommended for you.    Create your own actions to make your objective happen.

**Attend Leadership Conference in San Diego, CA**    Activity Type: **Outside Training**    Progress: **0%**    Due Date: **2/23/2021** **6e**

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

**6f**

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

**6g**

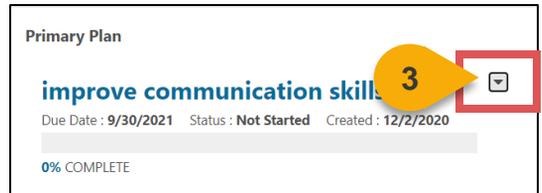
# Cancel IDP

*When you want to cancel an IDP...*

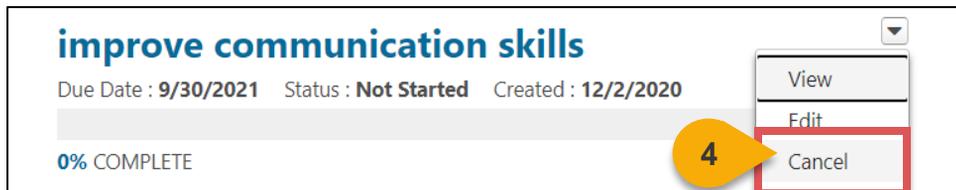
**Steps 1 & 2:** Hover over the **Performance** tab and then click **Development Plans**.



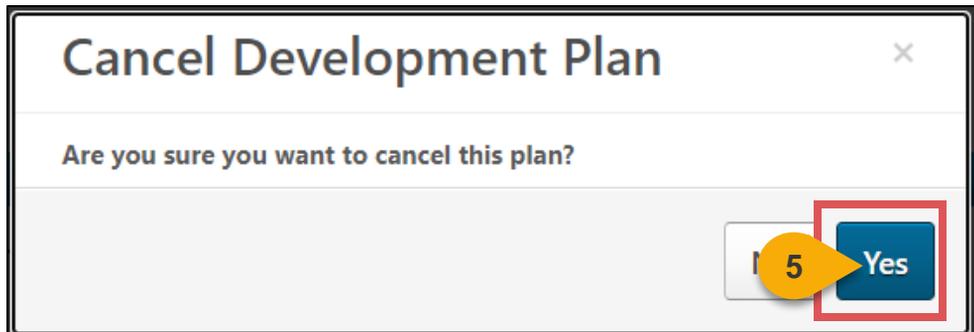
**Step 3:** Click the **dropdown arrow** next to the plan you would like to cancel.



**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.



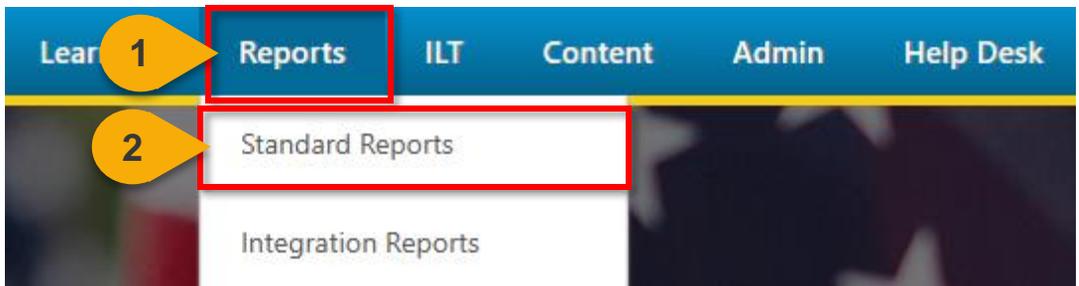
# Reports



# View Standard Reports

*When you want to view Standard Reports...*

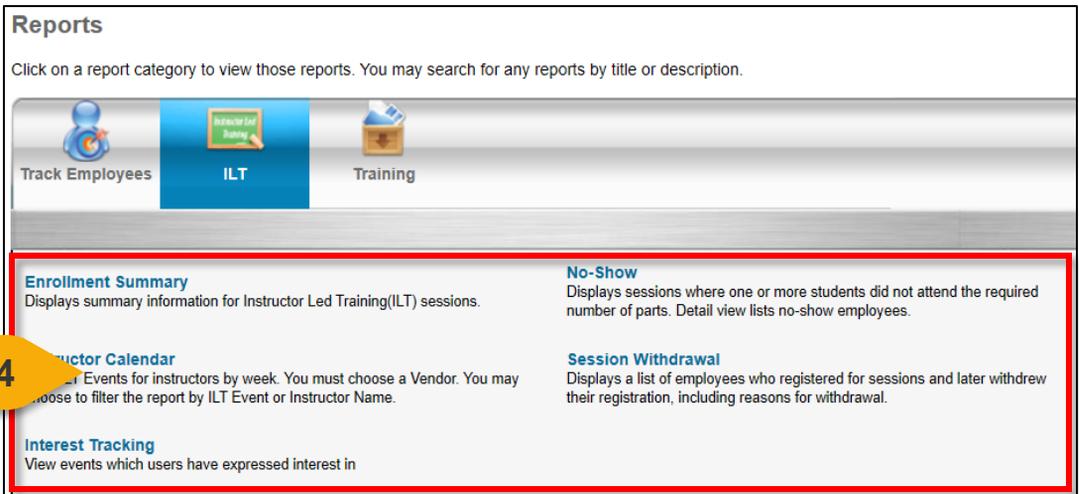
**Steps 1 & 2:** Hover over the Reports tab and then click Standard Reports.



**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.

**Enrollment Summary**  
View summary information for Instructor Led Training (ILT) sessions.

**Date Filters**

Date Criteria: Select ▼ From: 12/1/2020 To: 12/28/2020

**Advanced Filters**

5 Facility :

Vendor : All

Instructor :  (Please Select Vendor First)

Event :

Locator Number :

Printable Version Export to Excel Export to Text

**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.

**Enrollment Summary**  
View summary information for Instructor Led Training (ILT) sessions.

**Date Filters**

Date Criteria: Select ▼ From: 12/1/2020 To: 12/28/2020

**Advanced Filters**

Facility :

Vendor : All

Instructor :  (Please Select Vendor First)

Event :

Locator Number :

Printable Version Export to Excel Export to Text

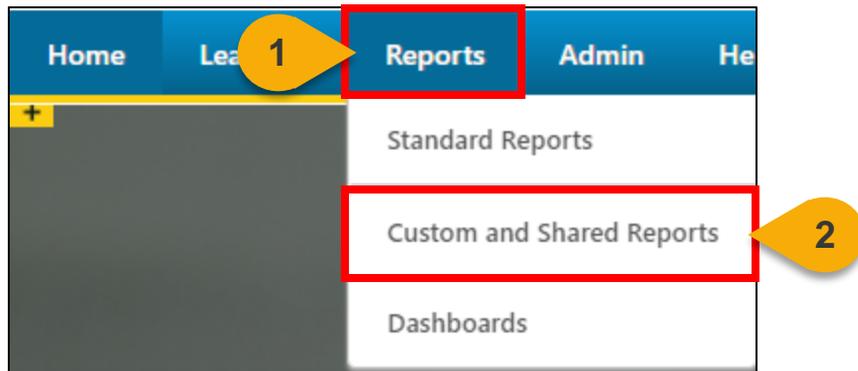
6

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

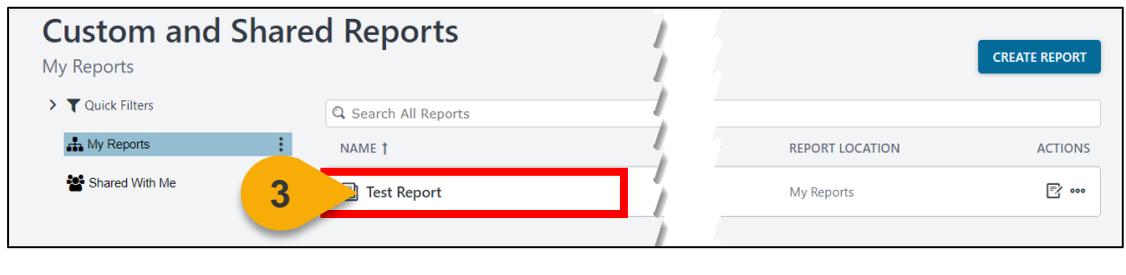
# View Custom Reports

*When you want view custom or shared reports...*

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

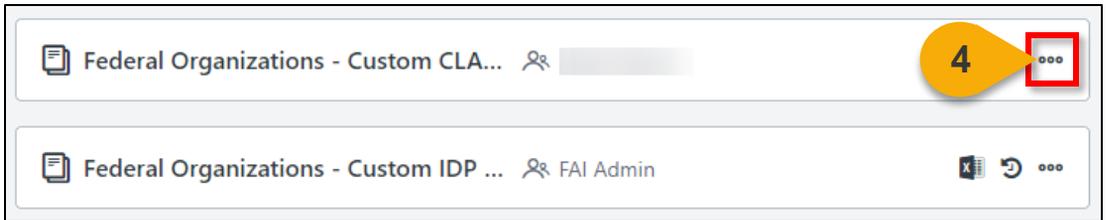


**Step 3:** You will arrive at the Custom and Shared Reports page. Here you will see all custom reports that you have created. Click on the **title** of the report to view it.

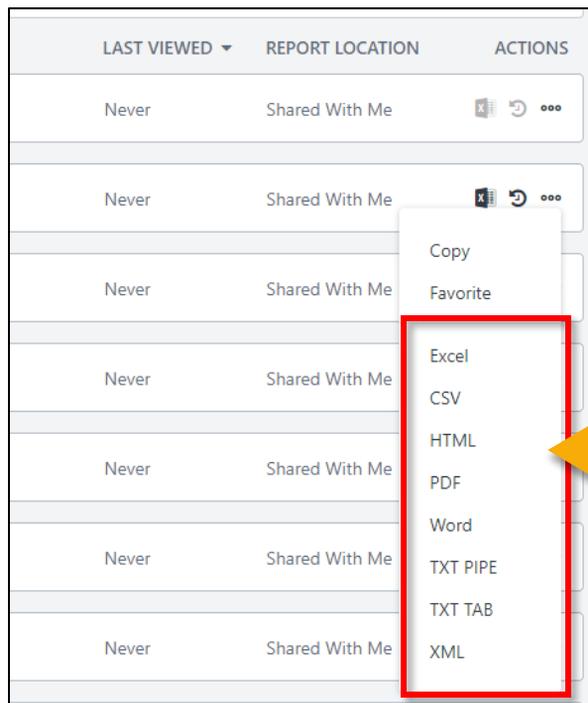


# View Custom Reports (Cont.1)

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



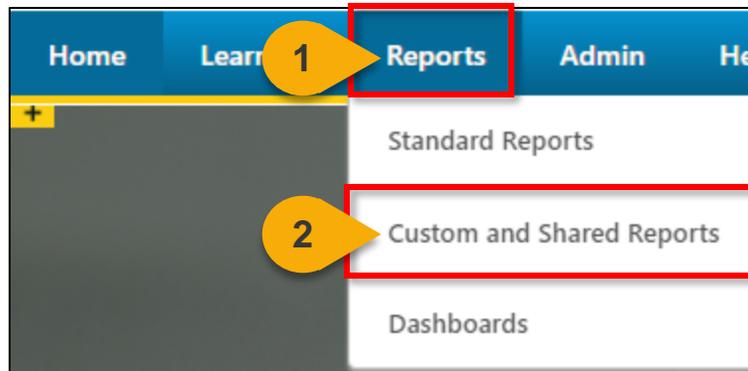
**Step 5:** Click the **file format** you wish to download. It will download to your computer.



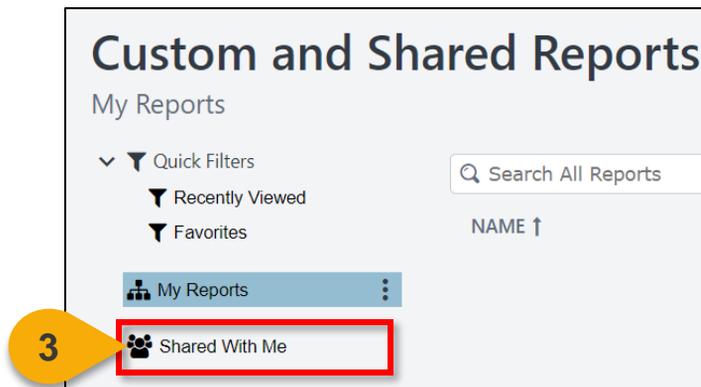
# Filter and Download Custom Reports

*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.**

6

Filters

Certifications - Certification Category is equal to FAC-C Continuous Learning

AND Certifications - Certification User Status is one of Select...

Calculated Fields - Days Until Certification Period Due is greater than 0

**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.

7

Performance

REFRESH

CLA Report

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

8

Performance

REFRESH

Download Options

CLA Report

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

9

min Help Desk Performance

Custom CLA

Excel

CSV

HTML

PDF

Word

TXT PIPE

TXT TAB

XML