FEDERAL ACQUISITION INSTITUTE

Instructor Task Aid

Task Aid Titles

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- Edit User Record
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https://www.fai.gov/

FAI@mail.mil

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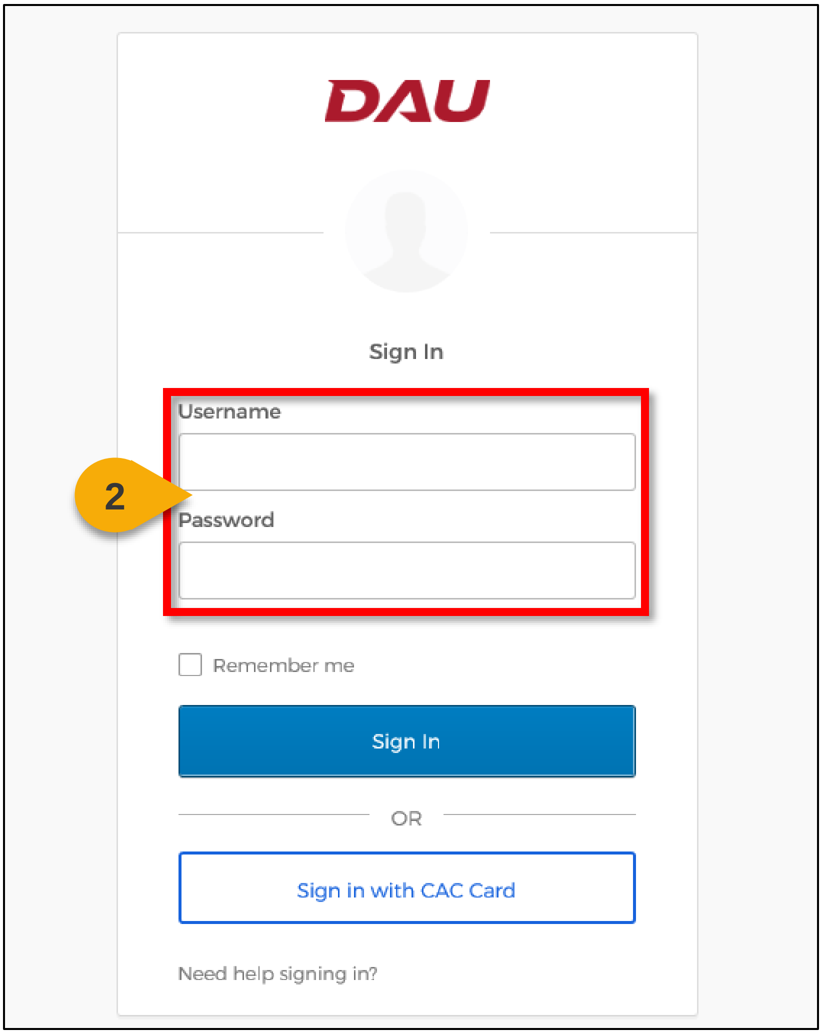
User Account Management

Log On

When you want to login…

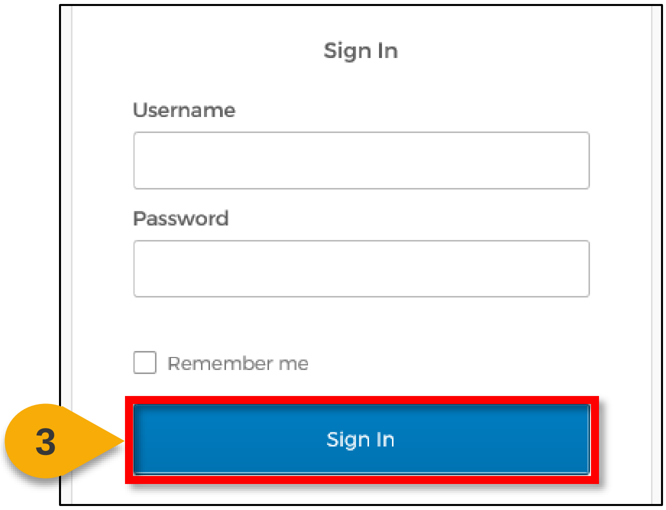
Step 1: Go to URL: https://dau-stg.csod.com (do not use the Internet Explorer browser). You may want to log out of VPN before starting this process.

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

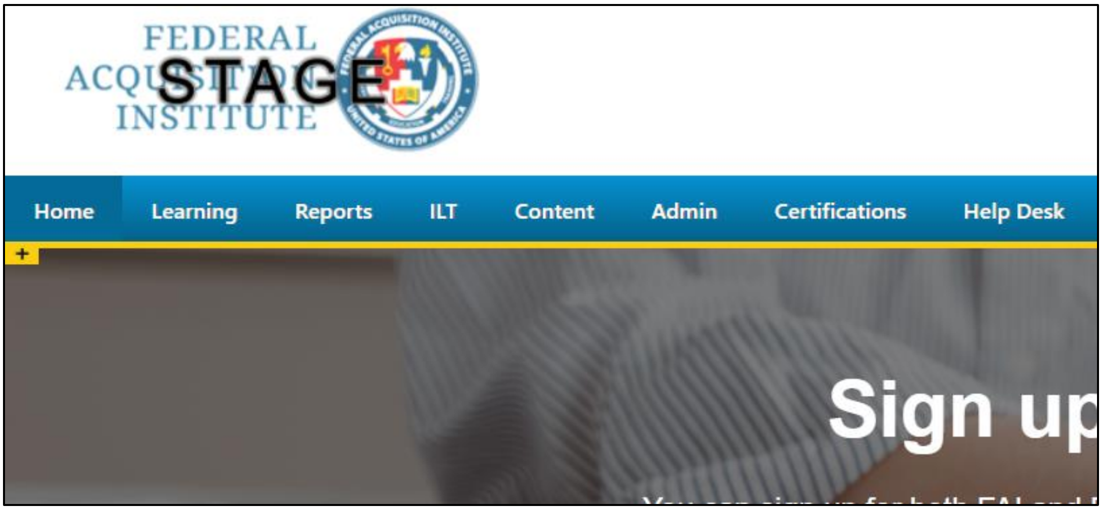


Log On (Cont.1)

Step 3: Click **Sign In.**



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



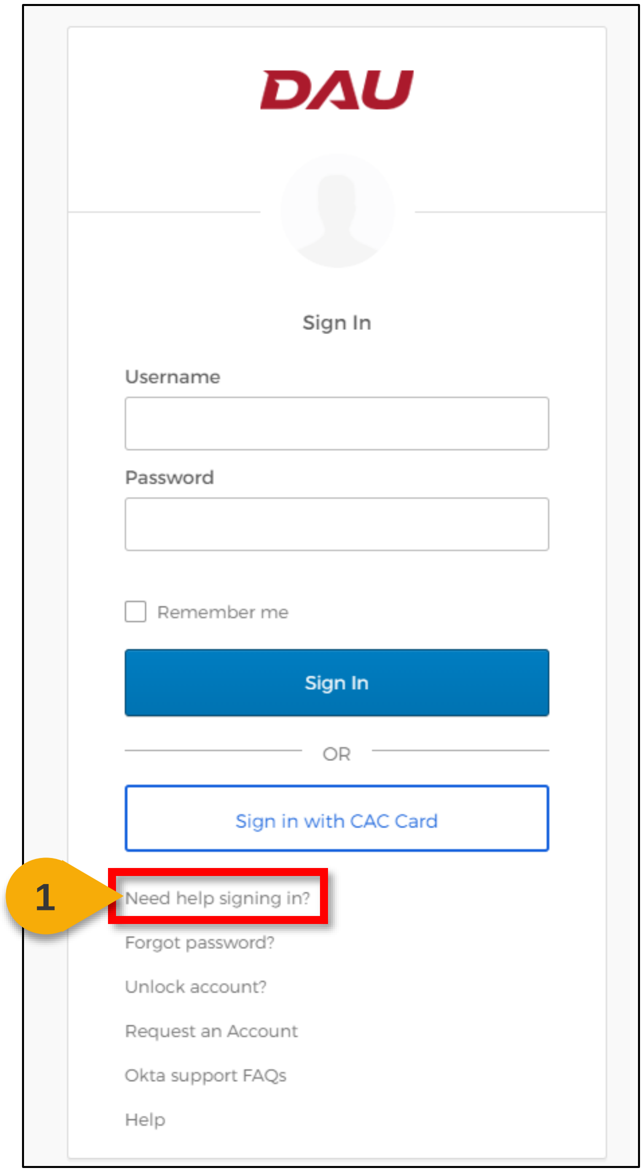
NOTE: If you receive an error message:

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

Forgot Password

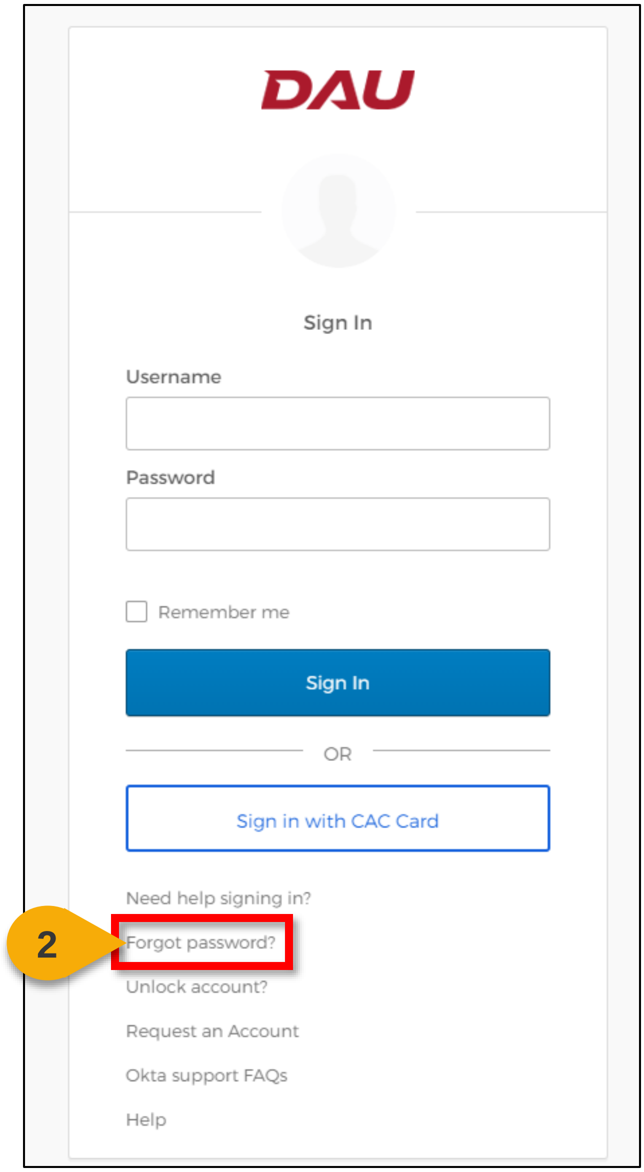
When you can't log on…

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



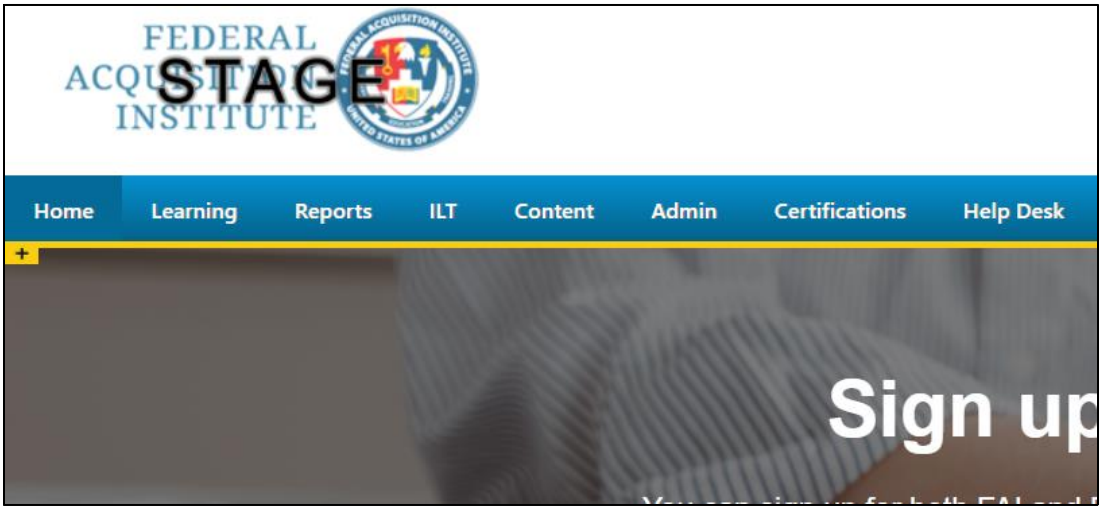
Forgot Password (Cont.1)

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



Forgot Password (Cont.3)

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



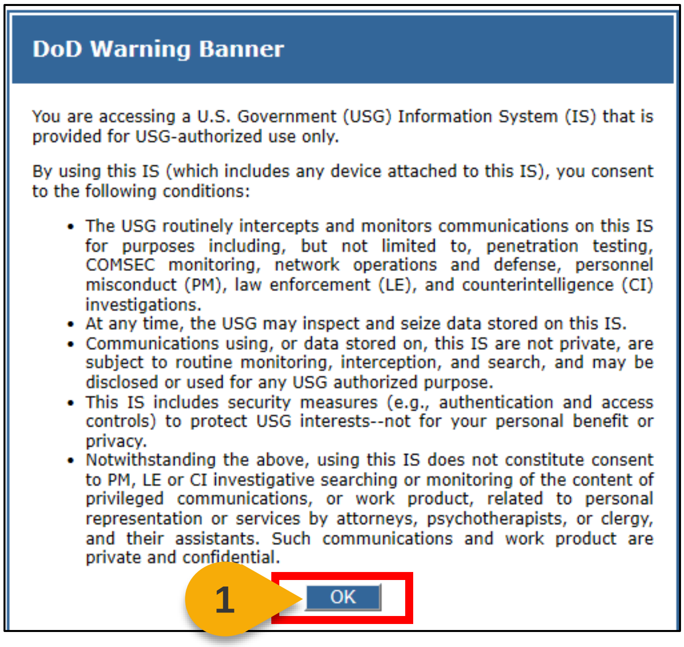
NOTE: If you receive an error message:

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

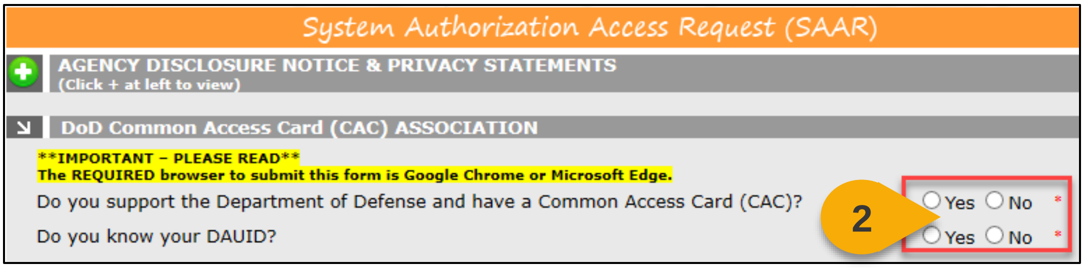
Request an Account Using the SAAR Form

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

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



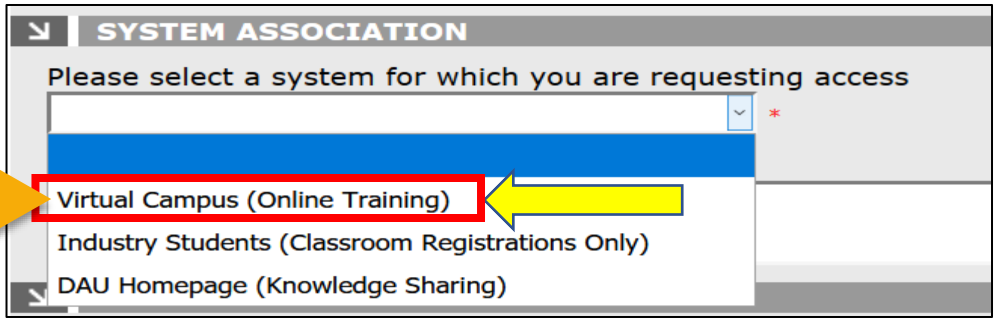
Step 2: Click the **radio buttons** to answer the questions regarding having a DoD CAC and/or DAUID.



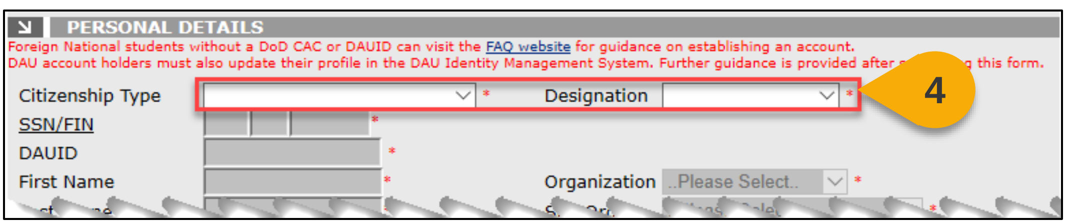
NOTE: If you support the Department of Defense and have a Common Access Card (CAC), the system can determine if there is already a DAUID associated to your information. If you select "Yes" and the system does find your account, the fields for your DAUID, Name, and Email address under PERSONAL DETAILS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

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

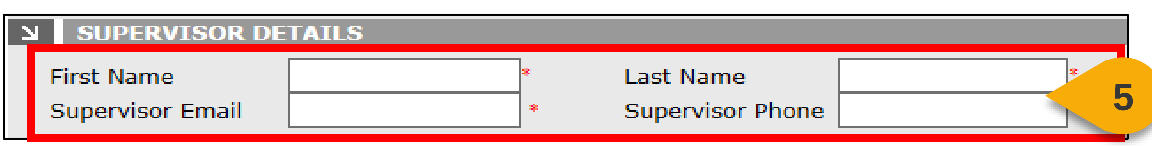
Step 3: Under SYSTEM ASSOCIATION you must select “**Virtual Campus (Online Training)”**. If you choose one of the other options, this will significantly delay the process to have an account created to take a course.



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



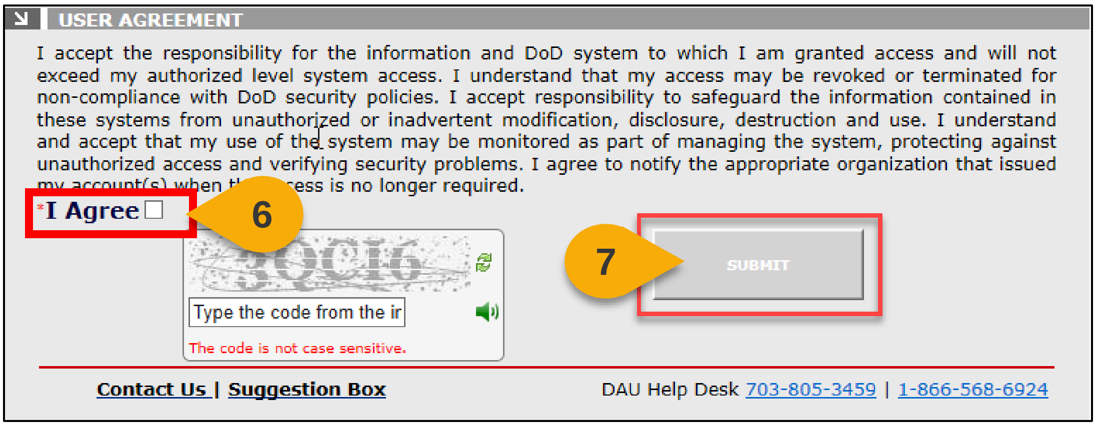
Step 5: Enter your **SUPERVISOR DETAILS**.



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

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

.

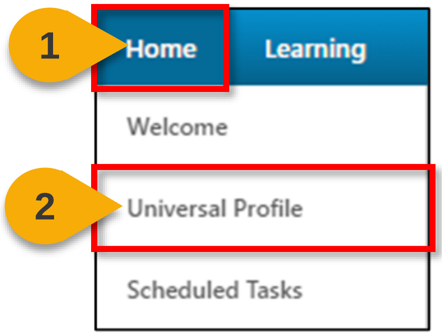


IMPORTANT: If there was any information that was not filled in correctly, there will be red text in the area of the form that requires your attention for correction. Afterwards, you will need to select the "**I Agree**" check box again and enter the new code in the image box for your SAAR to be submitted.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

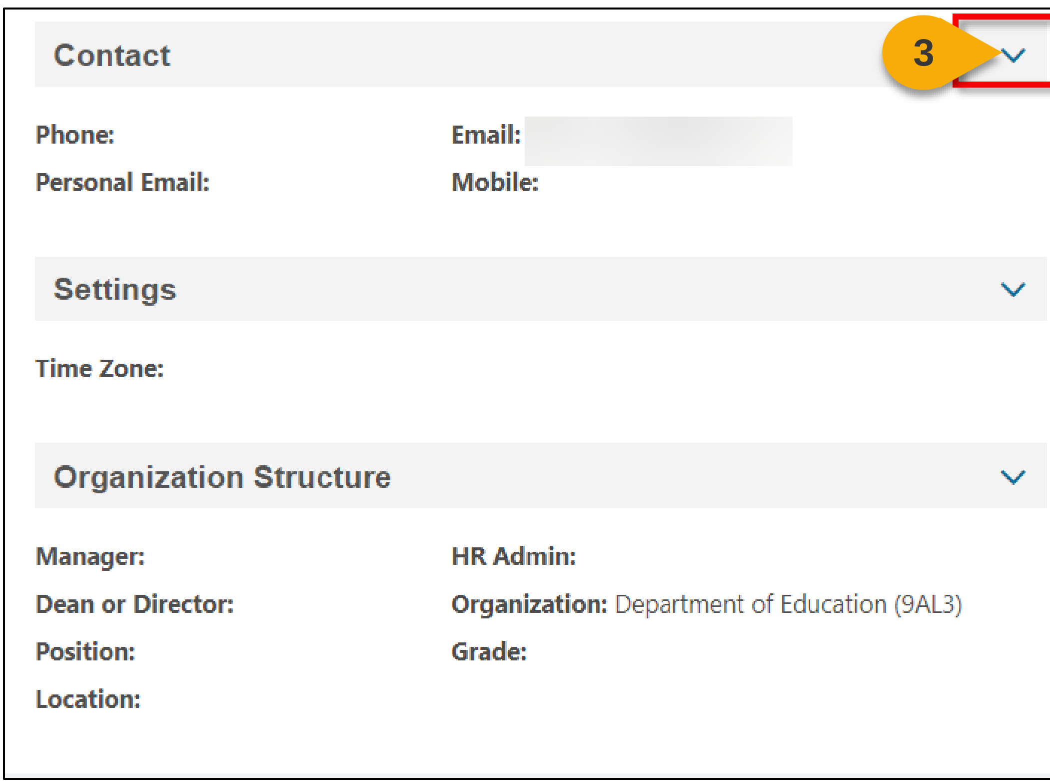
View User Record

When you want to view your User Record…

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



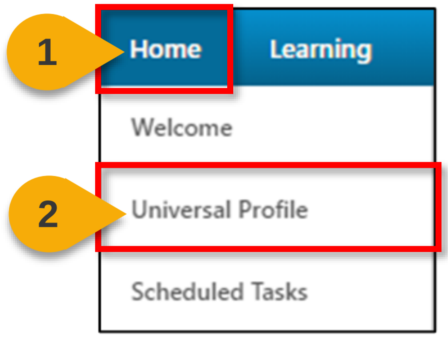
Step 3: To expand a section, click on the **arrow** to the right of that section.



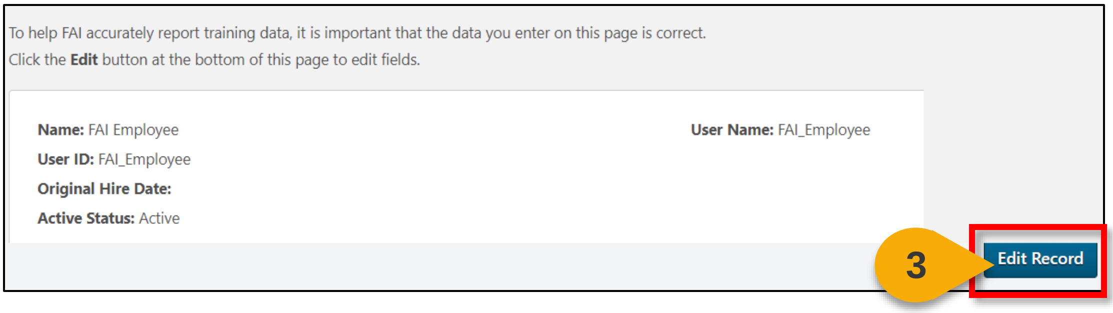
Edit User Record

When you want to edit information on the user record…

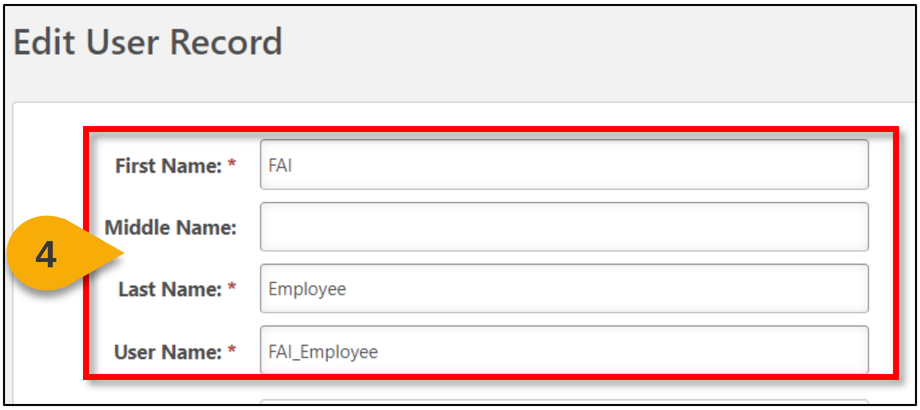
Steps 1 & 2: Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



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



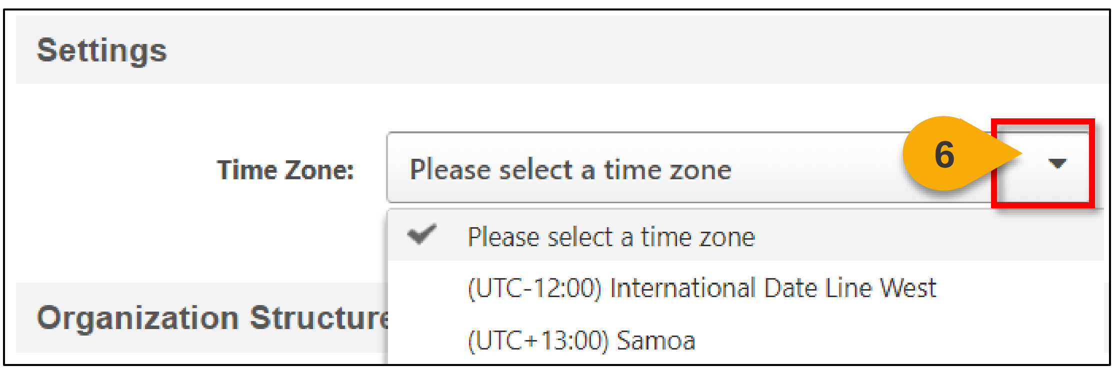
Step 4: In the first section at the top of the screen, you can edit **your First Name, Middle Name, Last Name, and User Name.**



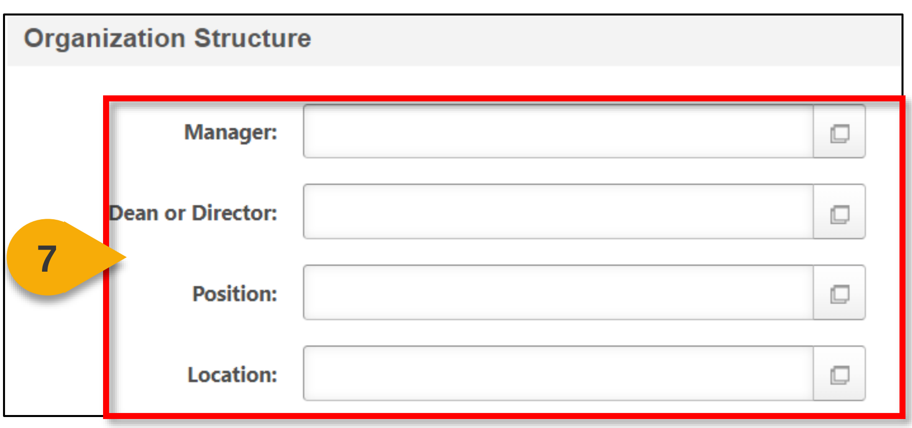
Edit User Record (Cont.1)

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

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

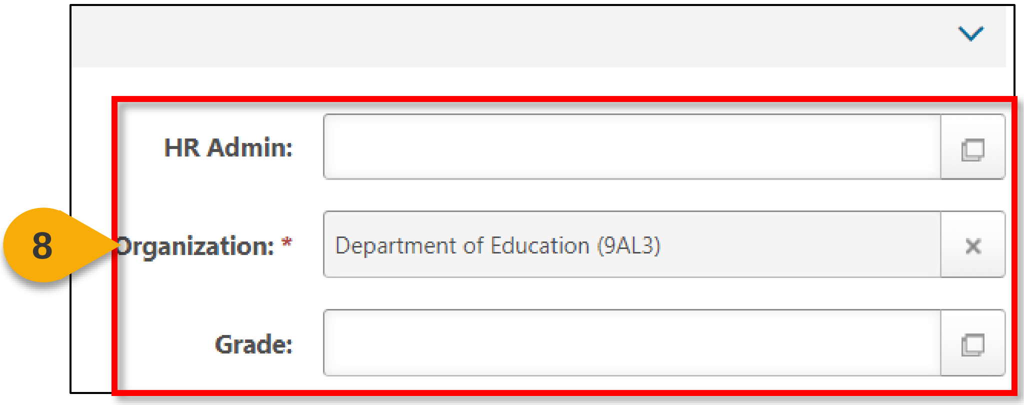


Step 7: In the Organization Structure section, you can input your **Manager, Dean or Director, Position, Location**.

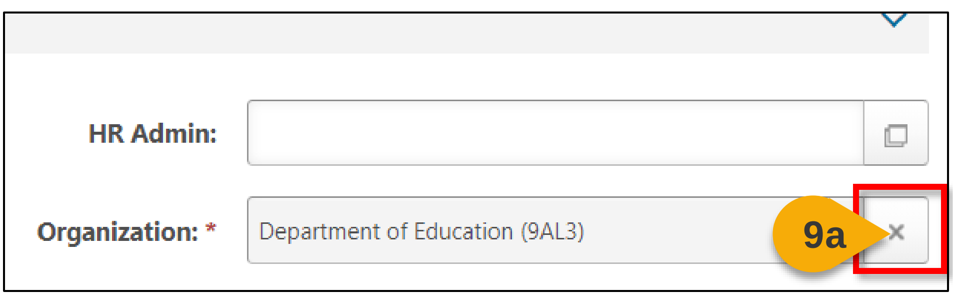


Edit User Record (Cont.2)

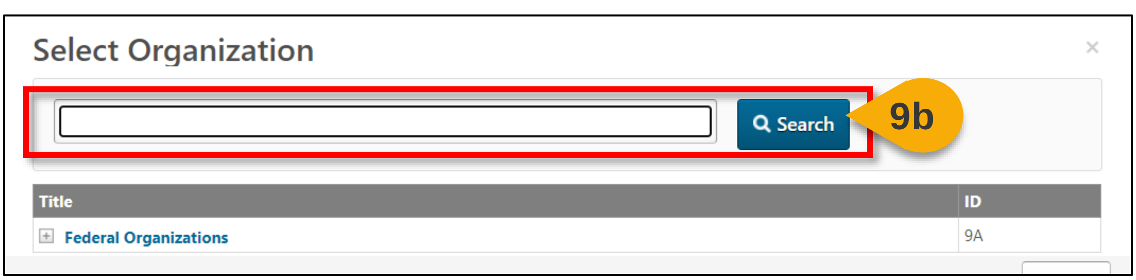
Step 8: In the Organization Structure, you can also edit the **HR Admin, Organization, and Grade.**



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

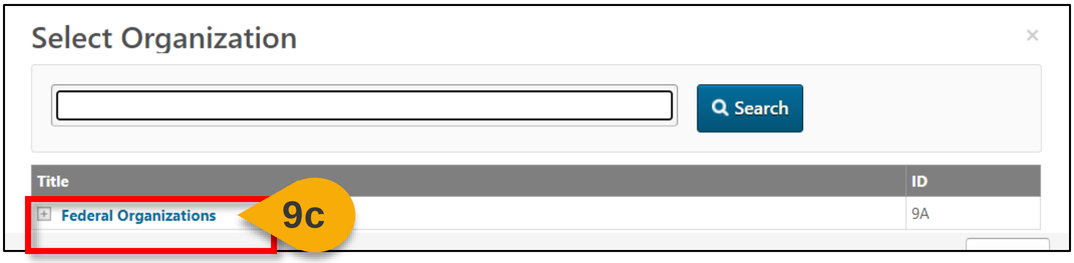


Step 9b: You can manually ente**r the name of your organization** in the search box.

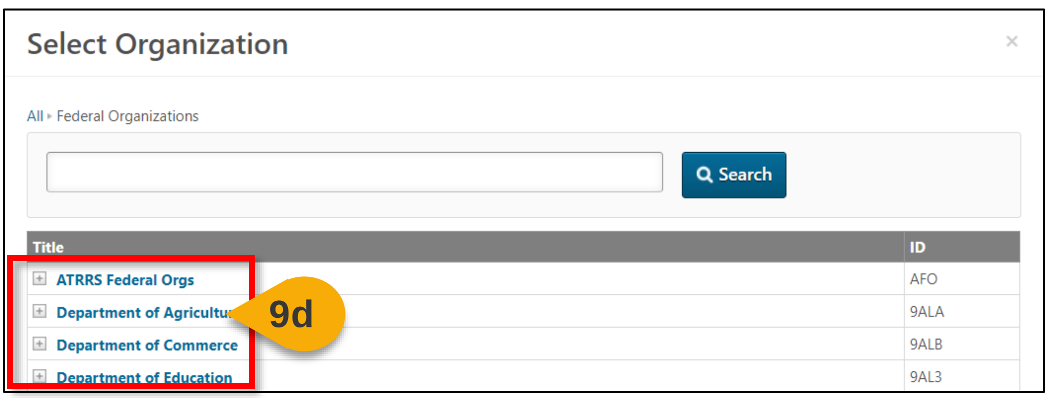


Edit User Record (Cont.3)

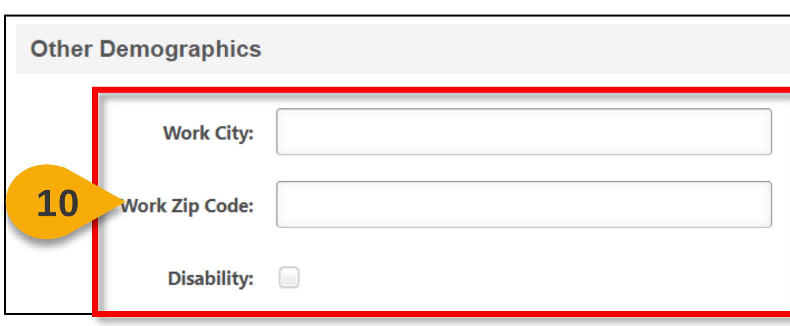
Step 9c: You can also click **Federal Organizations** to drill down to see more organizations and search manually.



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

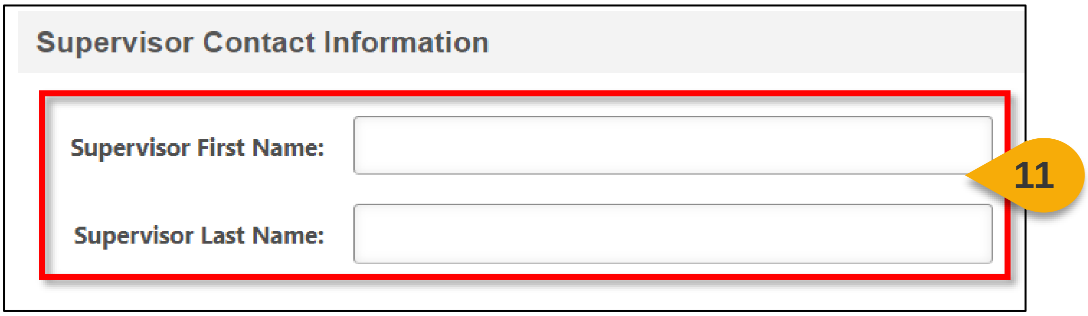


Step 10: In the Other Demographics section, you have the option to fill in additional information on your **demographics such as Work City, Zip Code, Disability, etc**.

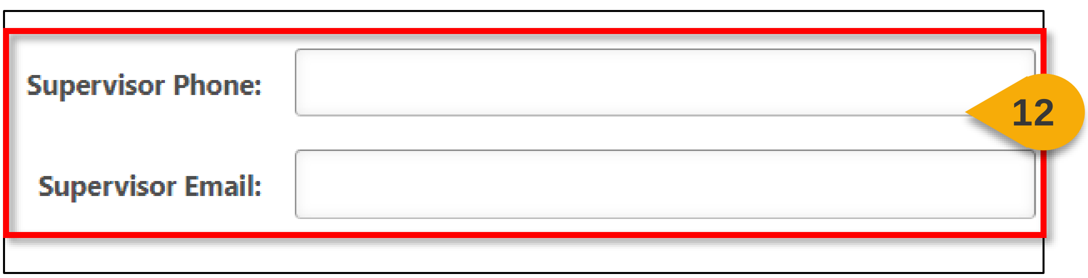


Edit User Record (Cont.4)

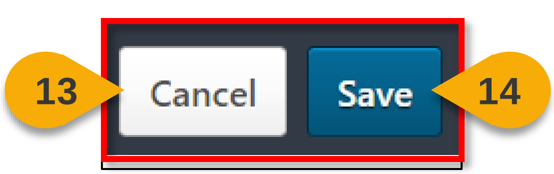
Step 11: In the **Supervisor Contact Information** section, you can fill in the first and last name of your supervisor.



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



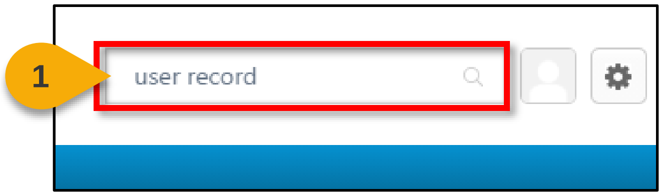
Steps 13 & 14: Click Save to keep all the changes or click Cancel to discard the changes.



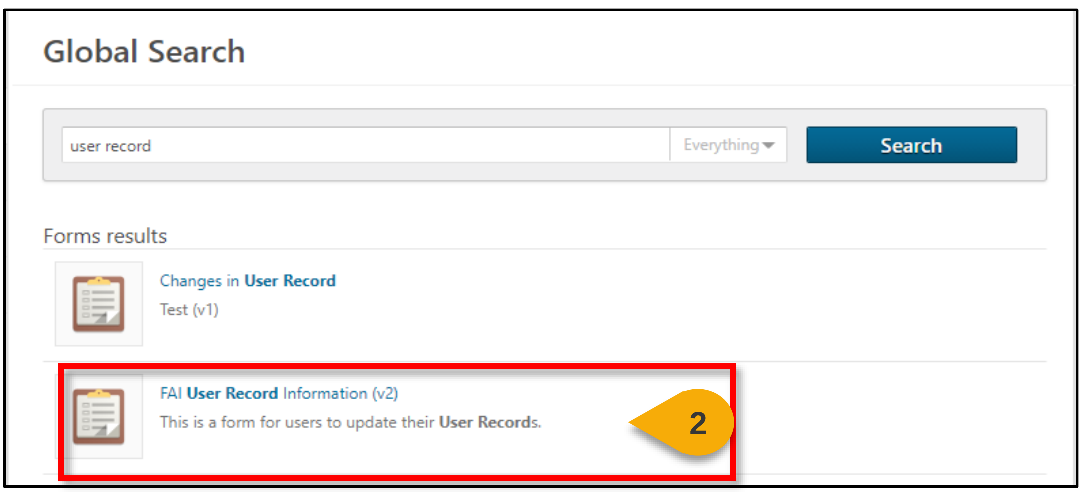
Edit User Record via Advanced Forms

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

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

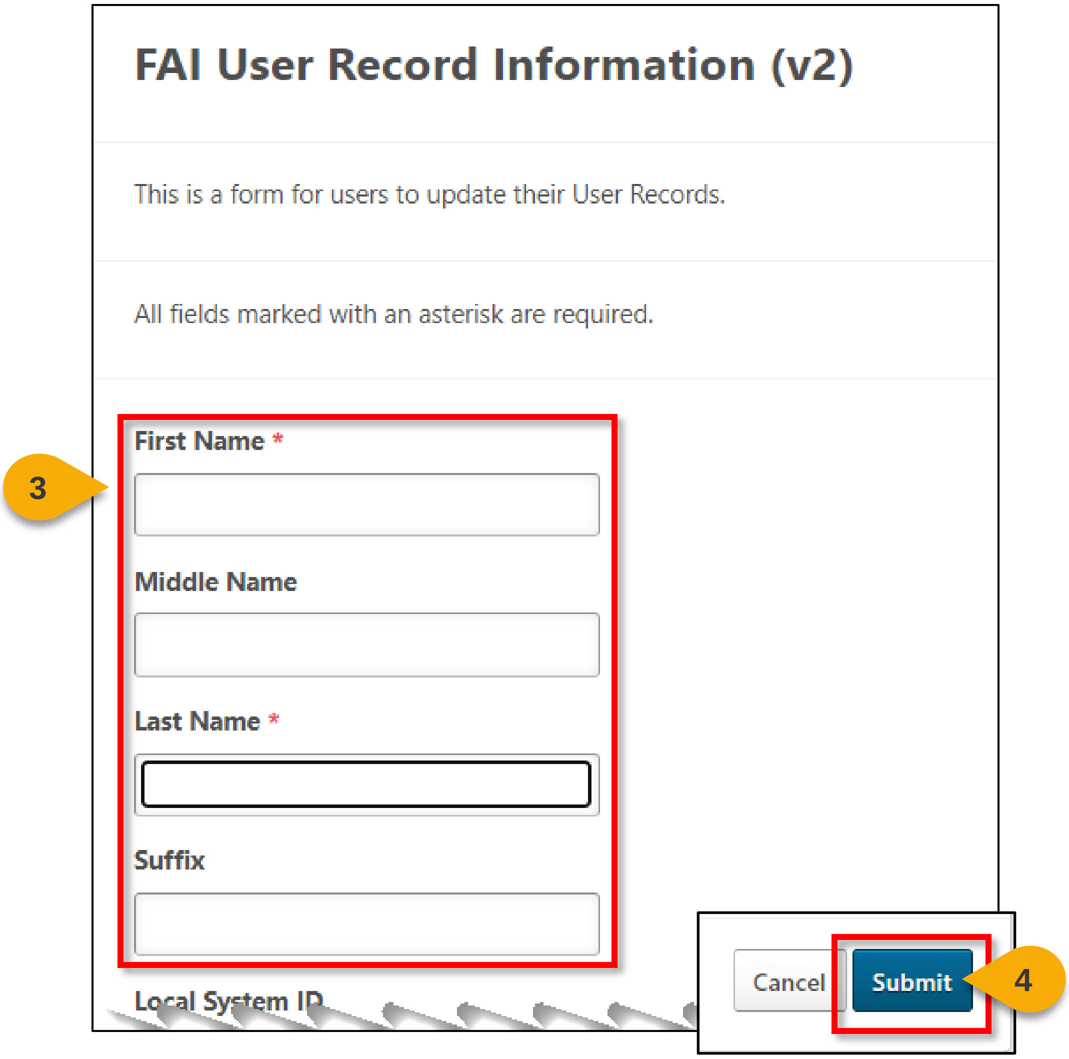


Step 2: Select the FAI User Record Information form.



Edit User Record via Advanced Forms (Cont.1)

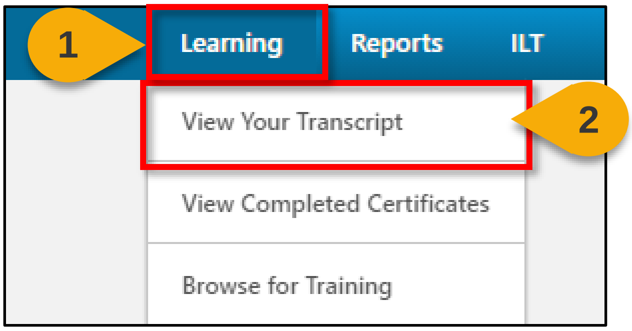
Steps 3 & 4: Fill in the form and click Submit at the bottom of the page when finished. Fields with a * are required. You will see the changes reflected on your User Record immediately.



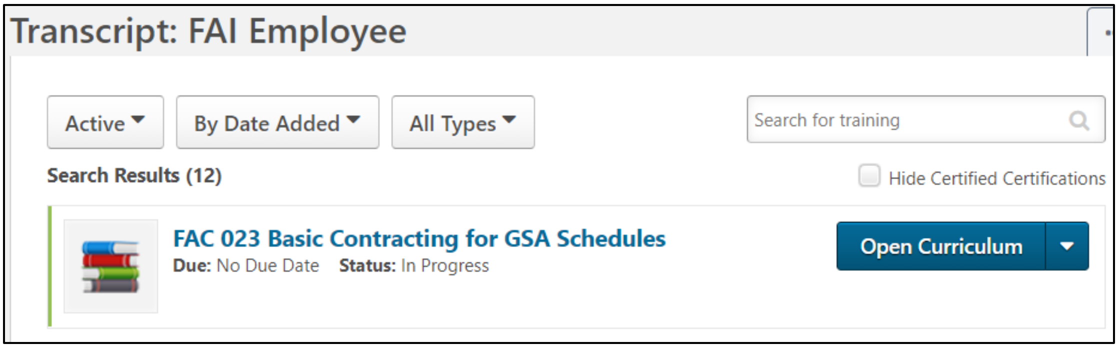
View Transcript

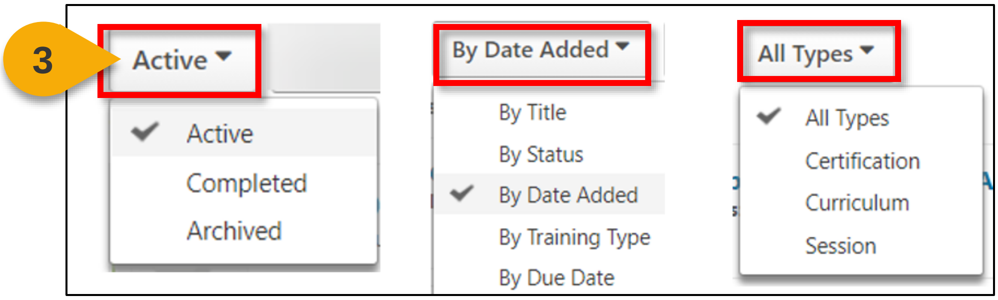
When you want to view your Transcript…

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



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

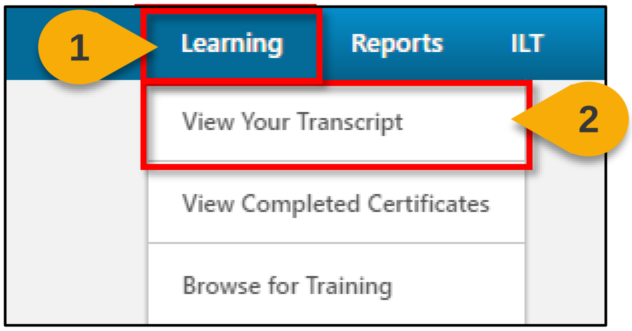




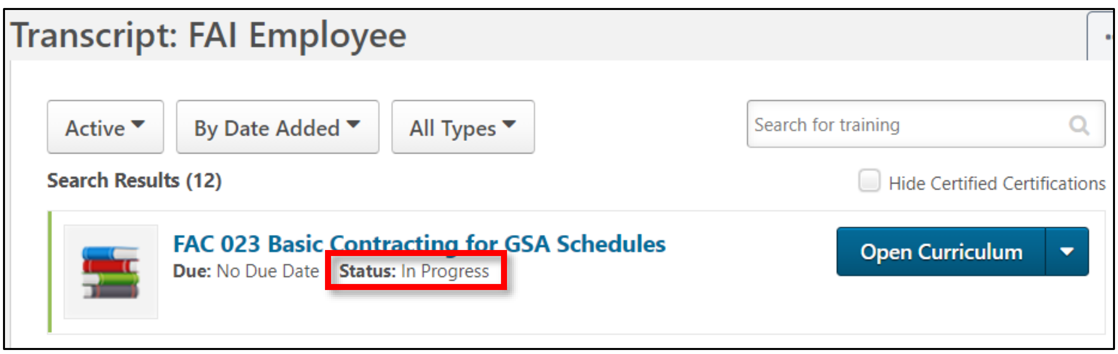
View Transcript Status

When you want to view your Transcript status…

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



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

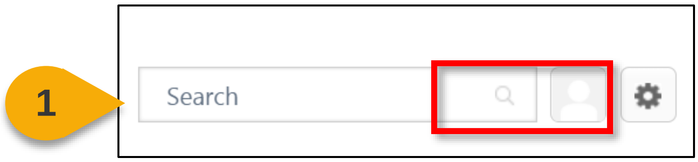


Use Global Search

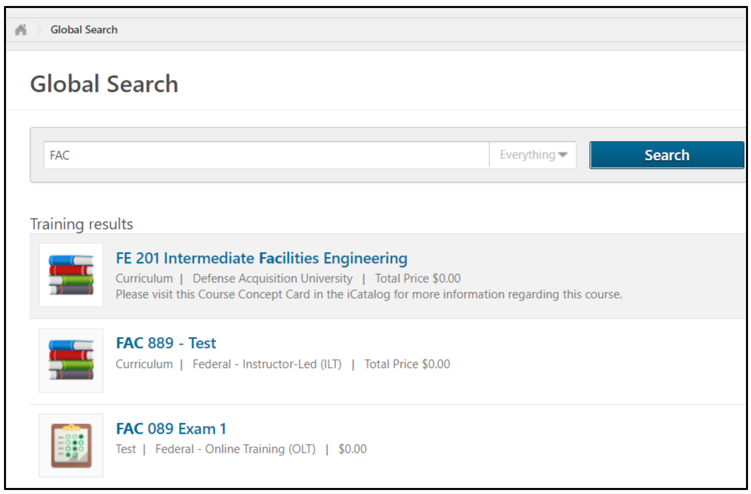
When you want to search for Training, Certifications, or Forms…

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

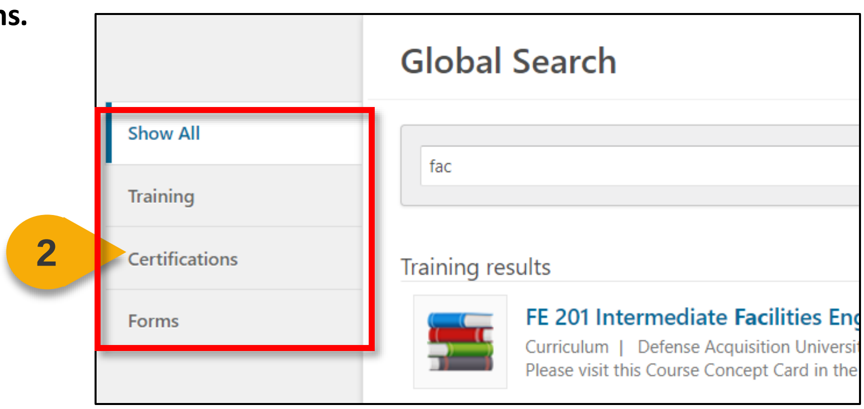
Step 1: Enter your desired Search Terms and click the **Magnifying Glass** or hit enter to search.



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.**

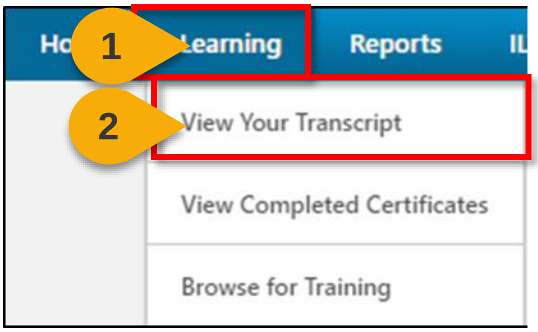


External Training

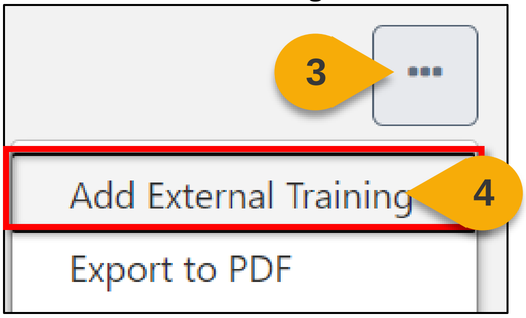
Request External Training Credit from Transcript

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

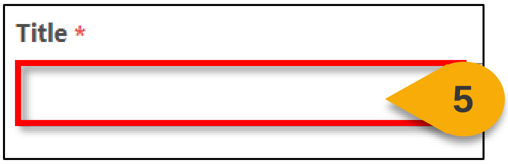
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript.**



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

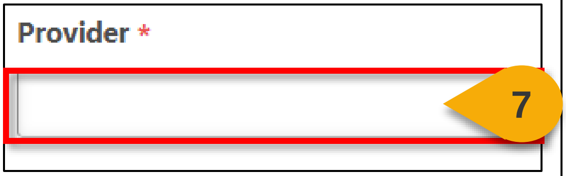


Step 5: Enter the title of your external training in the **Title** field.

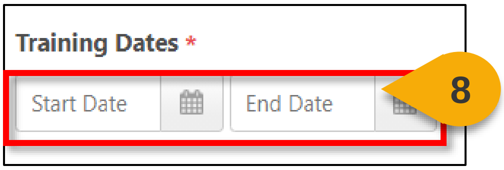


Step 6: Enter a description of the external training in the **Training Description** field.

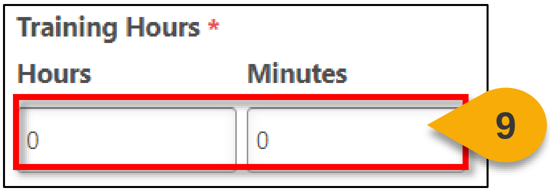
Step 7: Enter the name of the provider of the external training in the **Provider** field.



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

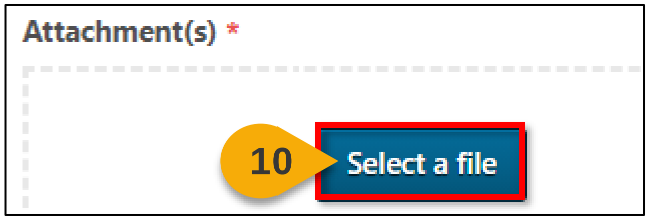


Step 9: Enter the training hours for your external training in the respective **Hours** and **Minutes** fields.



Request External Training Credit from Transcript (Cont.1)

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

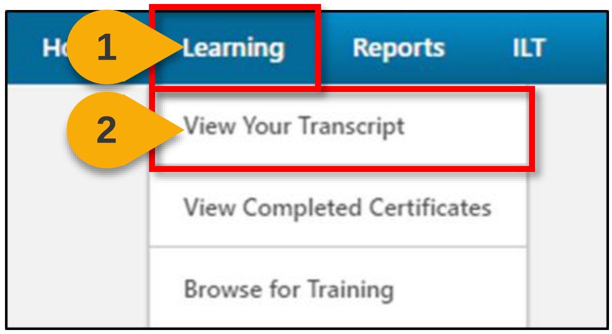


Step 11: Click **Submit** to submit the form for approval.

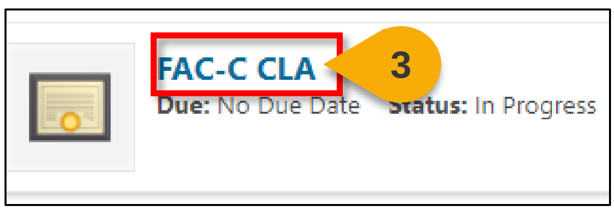
Request External Training Credit Within a Certification

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

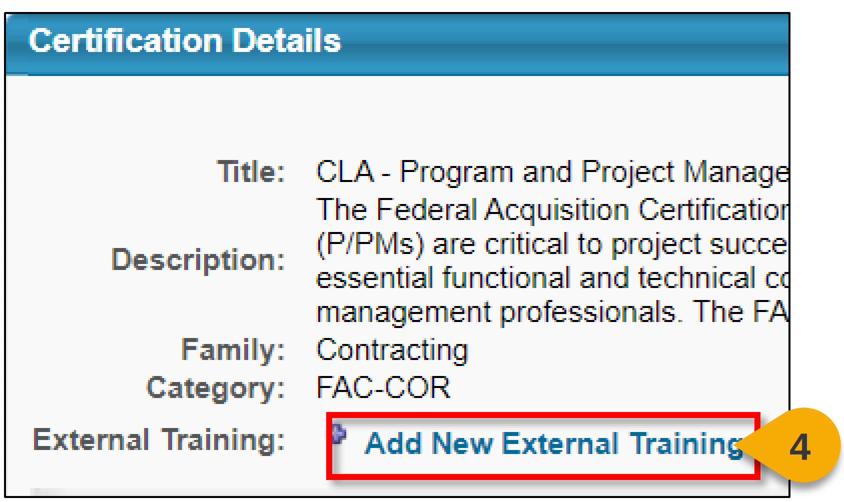
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript**.



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

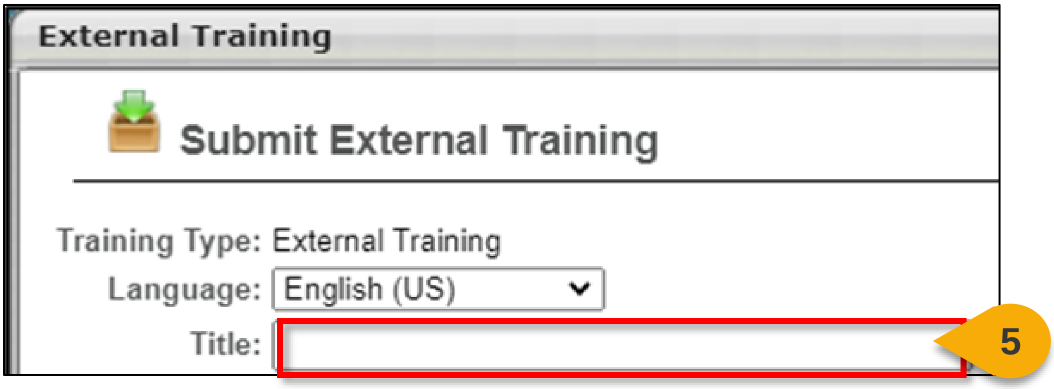


Step 4: Click on **Add New External Training.**

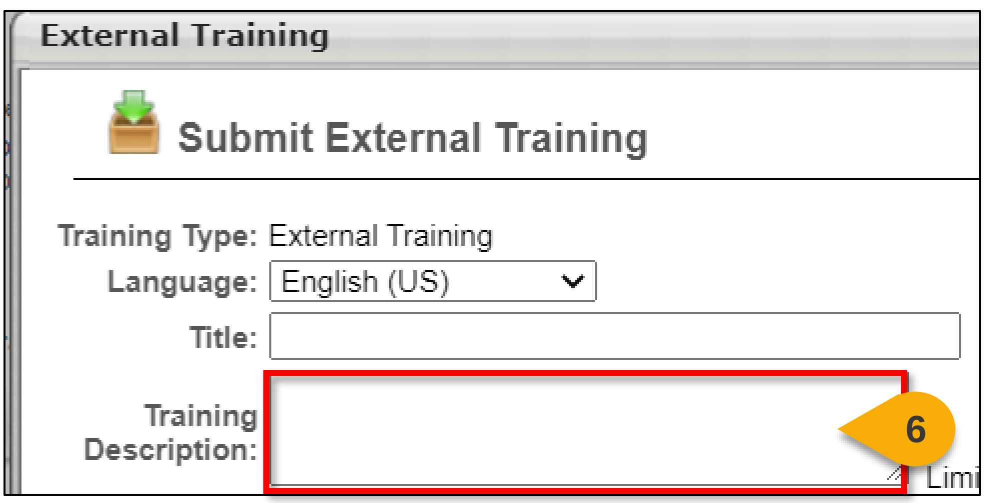


Request External Training Credit Within a Certification (Cont.1)

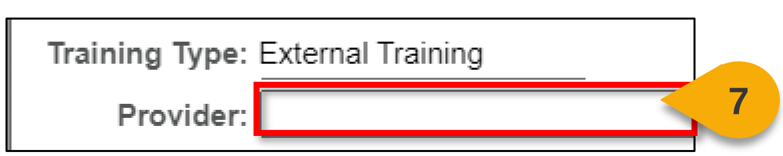
Step 5: A popup will appear. Enter the title in the **Title** field.



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

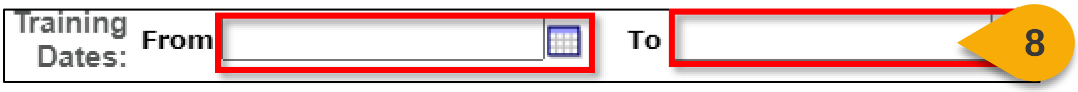


Step 7: Enter the name of the institution into the **Institution** field.

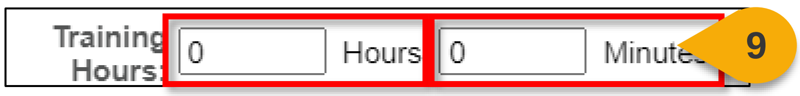


Request External Training Credit Within a Certification (Cont.2)

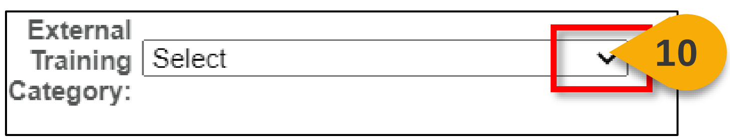
Step 8: Enter the dates of your external training in the **Training Dates** field.



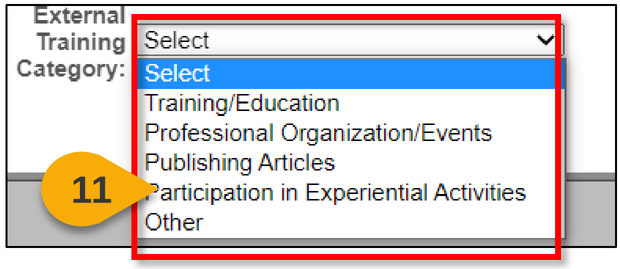
Step 9: Enter the number of hours and minutes of the external training into the **Training Hours** text fields.



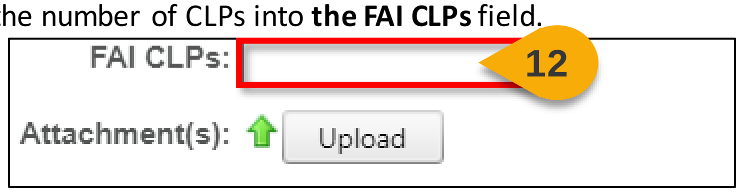
Step 10: Click the **dropdown button** next to the External Training category field



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



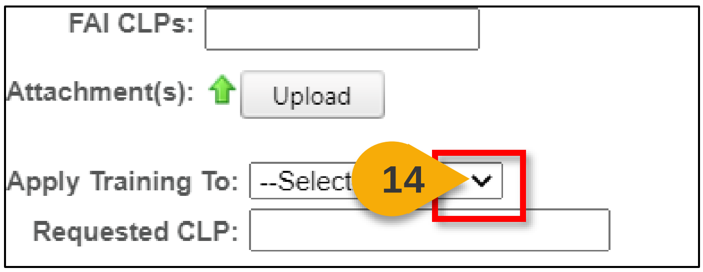
Step 12: Enter the number of CLPs into **the FAI CLPs** field.



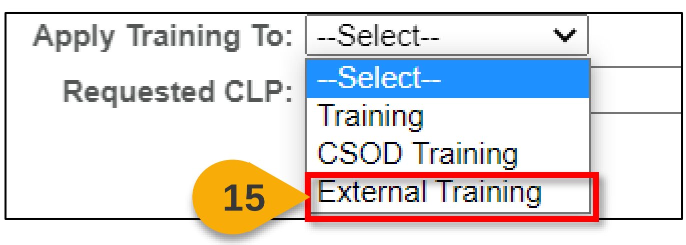
Request External Training Credit Within a Certification (Cont.3)

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

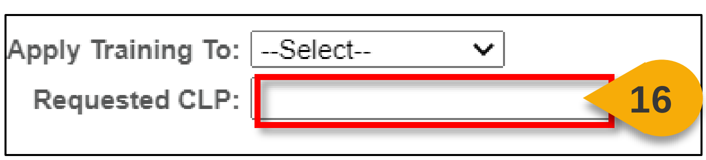
Step 14:: Click the **dropdown button** next to the Apply Training To field.



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

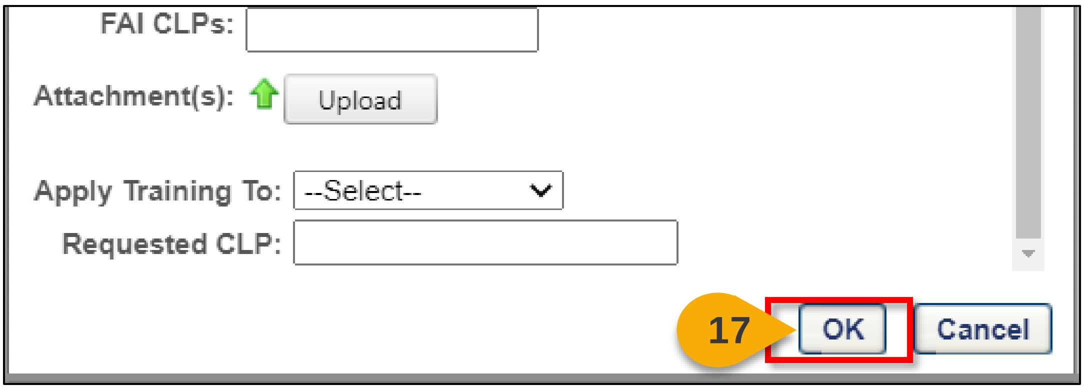


Step 16: Enter the **number of CLPs** earned in the Requested CLP field.



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

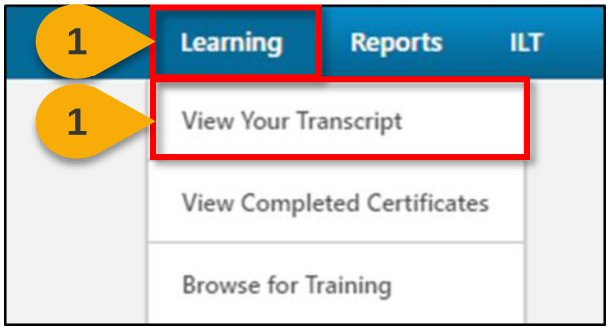
Step 17: Click **Ok** when you you've finished entering the information on your external training. This will submit the form to an External Training Approver.



Add External Training to a Certification

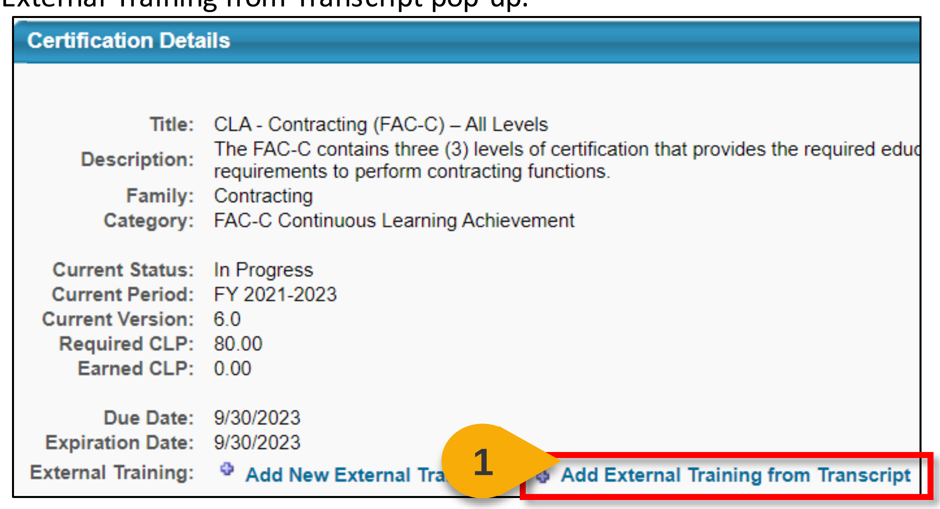
When you want to submit external training from your transcript to fulfill a certification requirement…

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



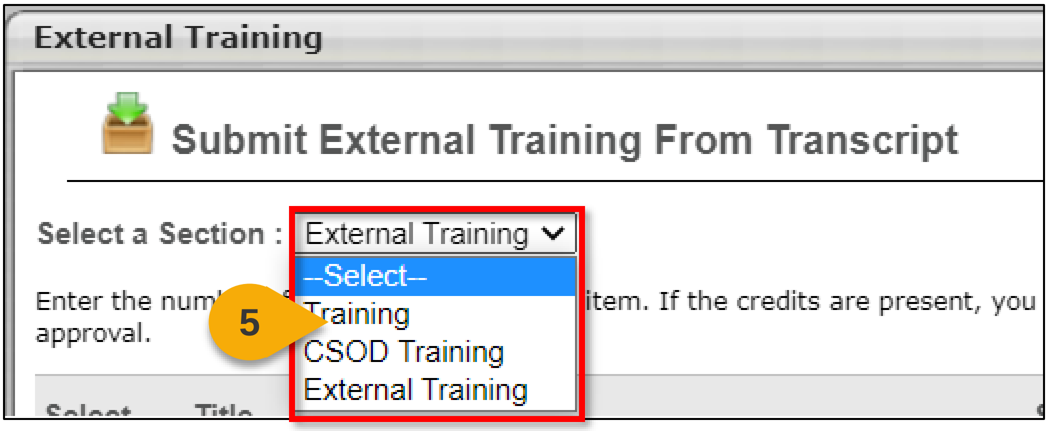
Step 3: Click on the **title** of the Certificate to which you'd like to add your external training.

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

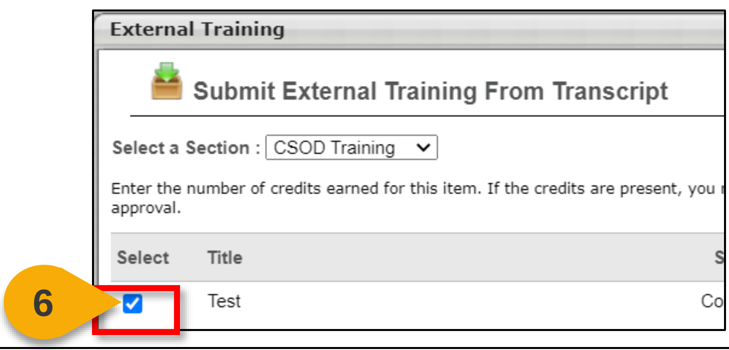


Add External Training to a Certification (Cont.1)

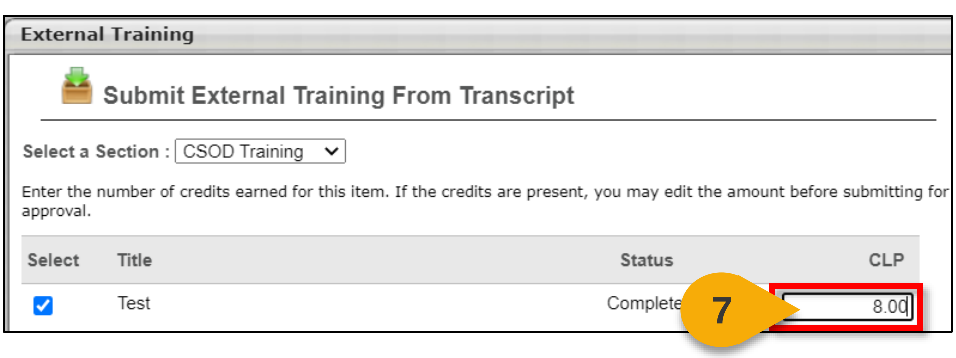
Step 5: Click the **dropdown** next to Select a Section to choose the section of the .certificate that the training will be applied to



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

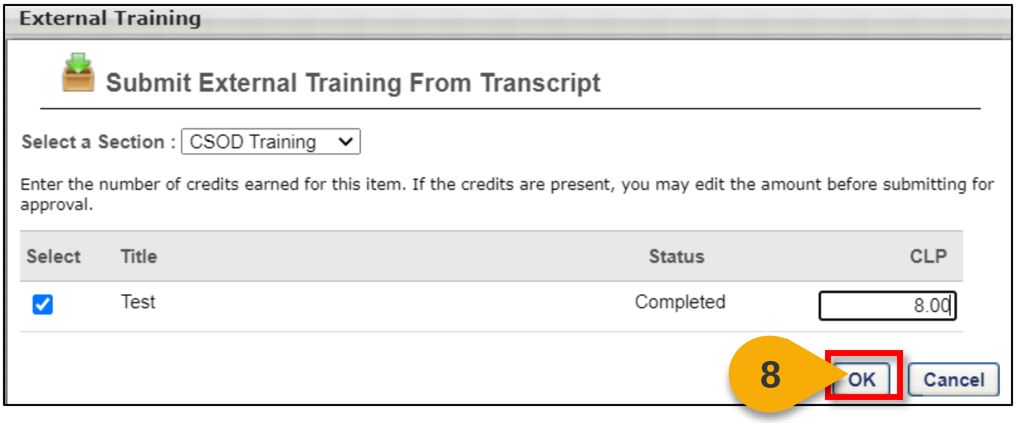


Step 7: In the **CLP** field to the right of the training item, enter the number of credits that were earned from the External Training.

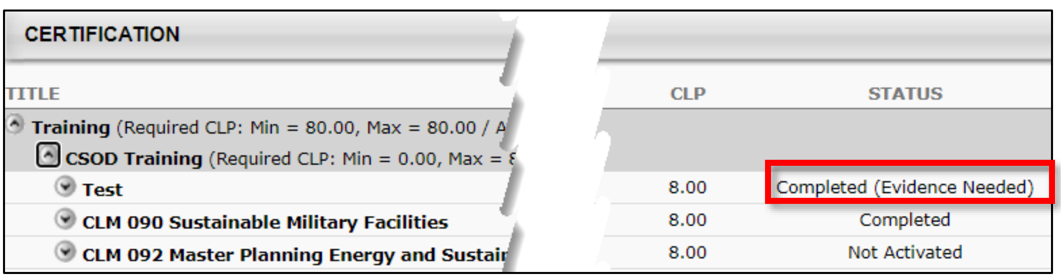


Add External Training to a Certification (Cont.2)

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



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

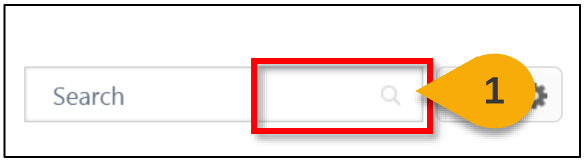


Online Training

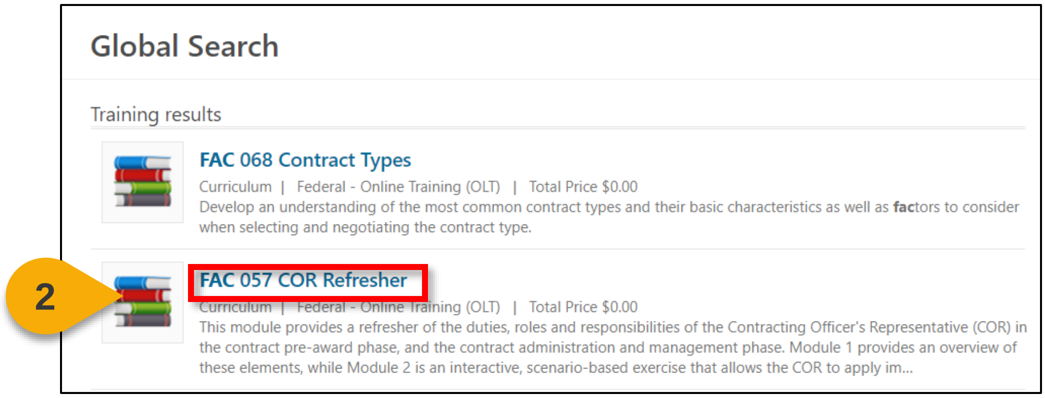
Register for Online Training (OLT)

When you want to register for Online Training…

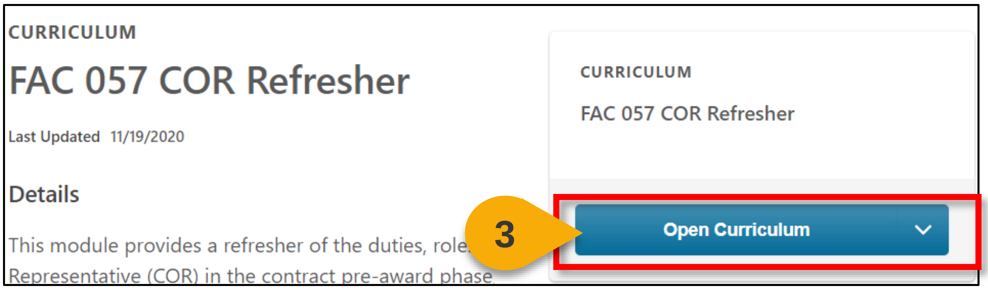
Step 1: Type the name of the OLT you would like to take into the Global Search box and click **the magnifying glass** or hit enter.

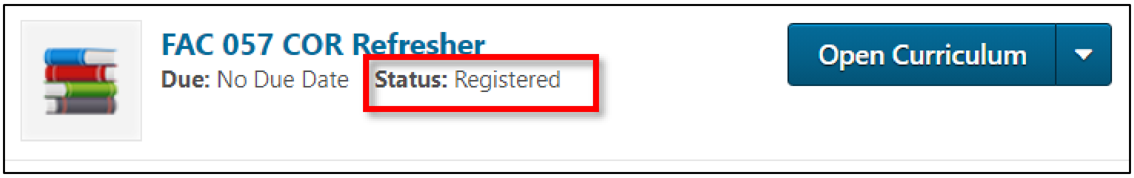


Step 2: Your search results will appear on the next page. Click the **title** of the OLT you would like to take.



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



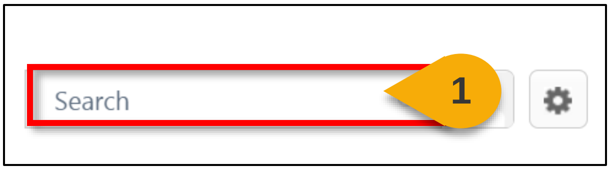


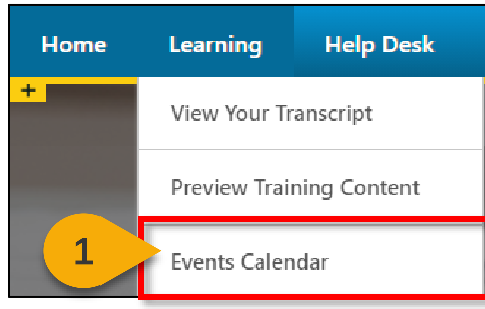
Instructor-Led Training

Register for Instructor-Led Training (ILT)

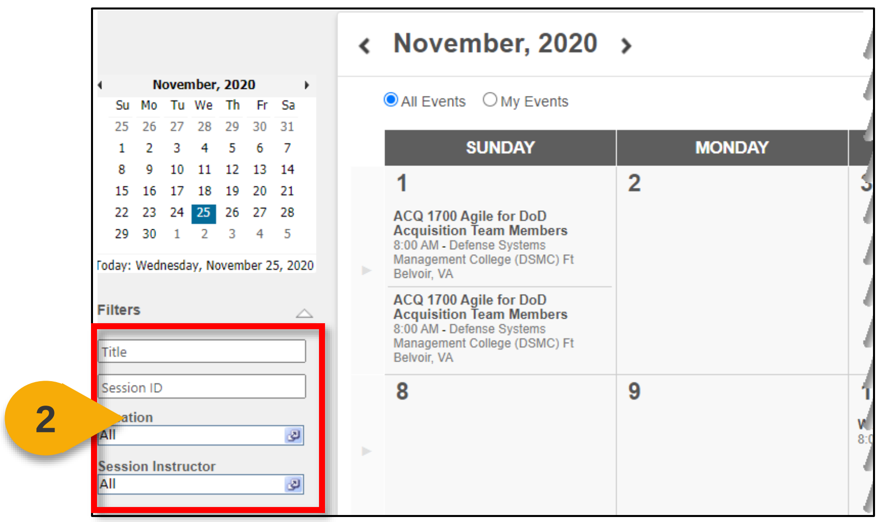
When you want to register for an Instructor Led Training…

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

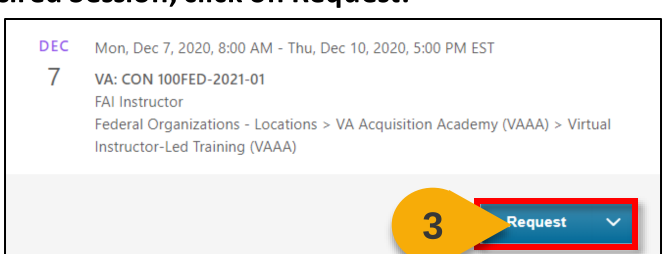




Step 2: On the Events Calendar, you can search by Title, Session ID, Subject, or Instructor.



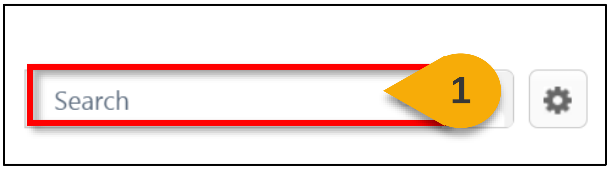
Step 3: The Event will be displayed on the screen. You will see any available Sessions. Next to the desired Session, click on Request.

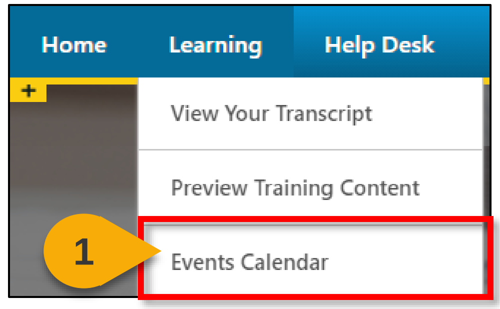


Register for Instructor-Led Training (ILT)

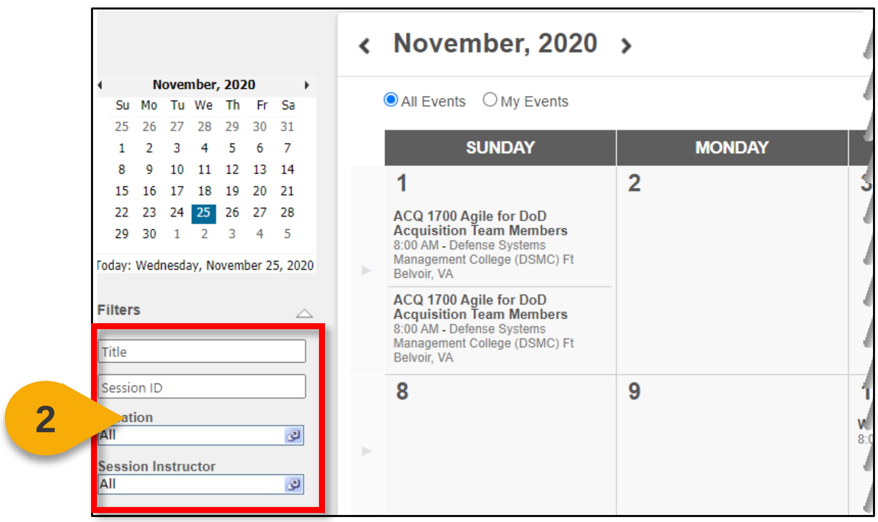
When you want to register for an Instructor Led Training…

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

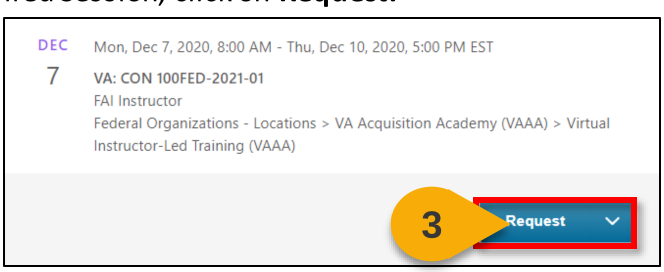




Step 2: On the Events Calendar, you can search **by Title, Session ID, Subject, or Instructor.**



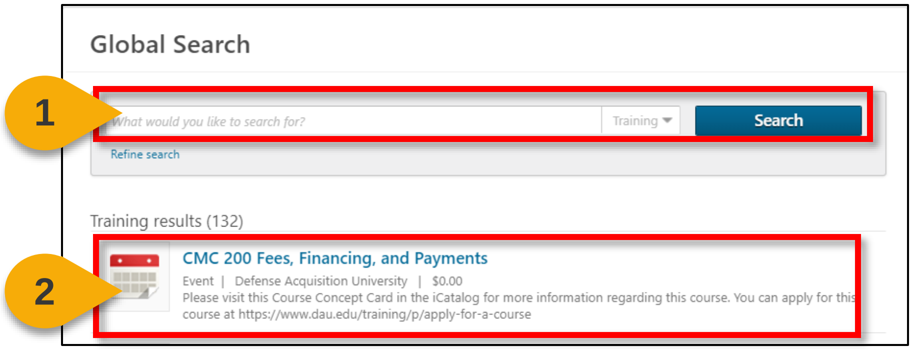
Step 3: The Event will be displayed on the screen. You will see any available Sessions. Next to the desired Session, click on **Request.**



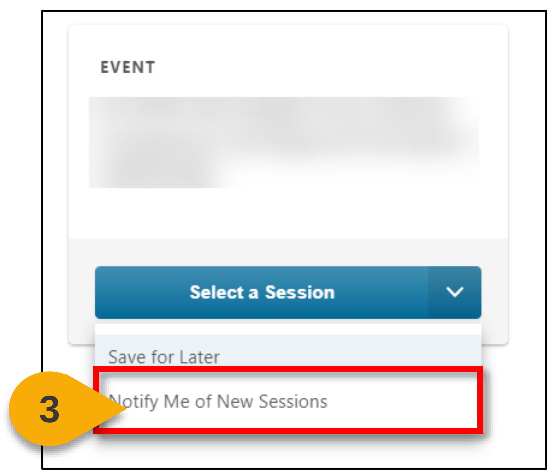
Indicate Interest in a Future Session

When interested in a course once new Sessions become available…

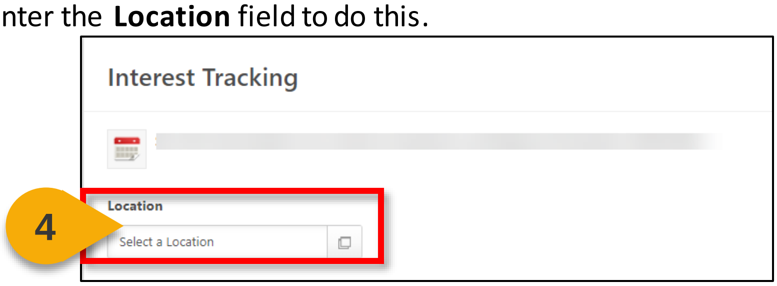
Steps 1 & 2 : Using Global Search, search for the Event you'd like register for. Click on the **Event Title.**



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

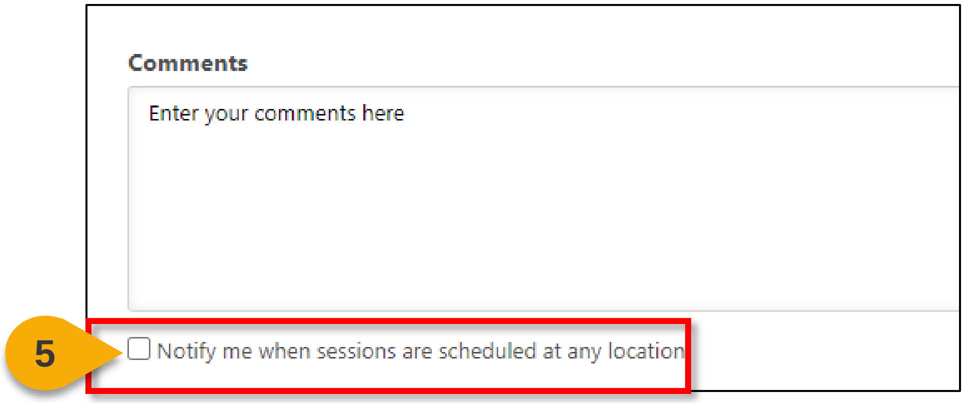


Step 4: You have the option to select to be notified of Sessions held in a specific location. Enter the **Location** field to do this.



Indicate Interest in a Future Session (Cont. 1)

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

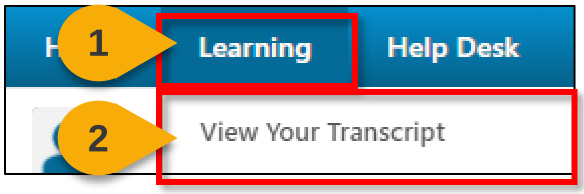


Step 6: Once you have completed selecting the location preferences, click the **Submit** button at the bottom of the page.

Withdraw from an ILT

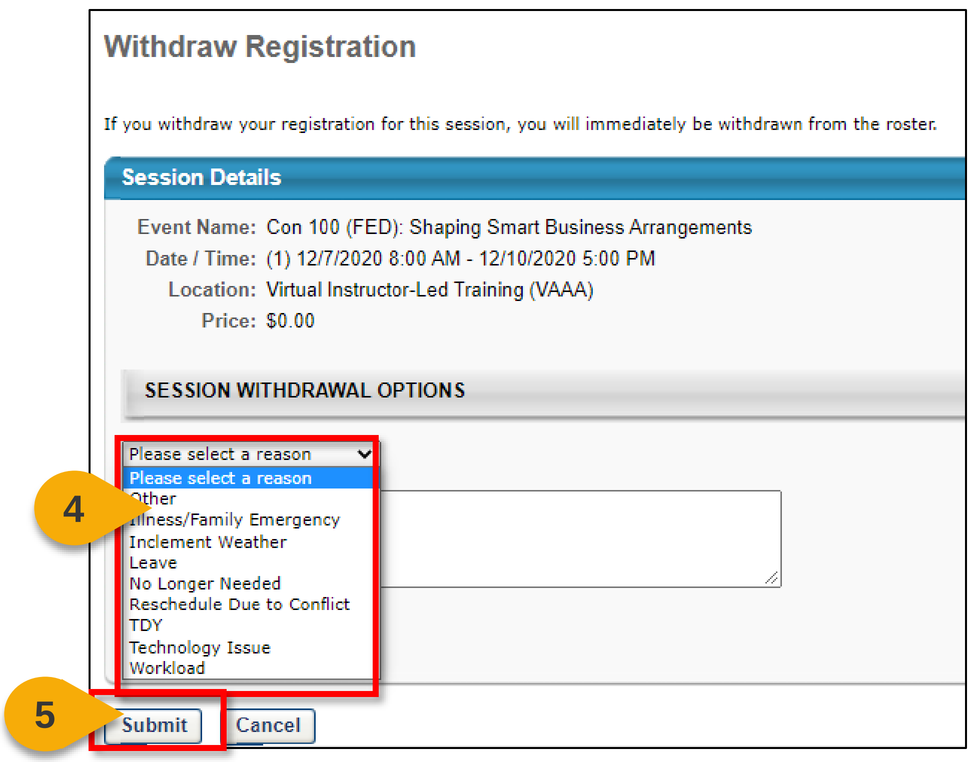
When you need to withdraw from an ILT course…

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



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

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

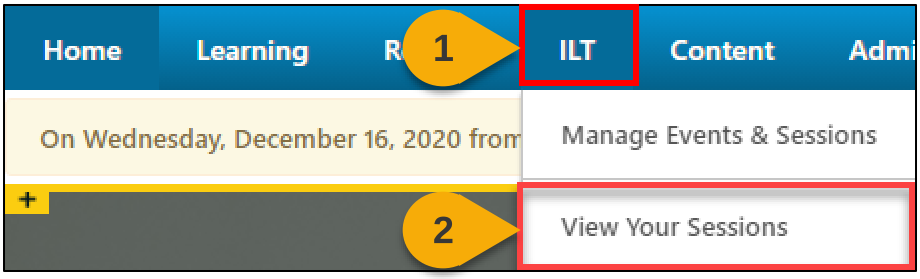


Sessions and Rosters

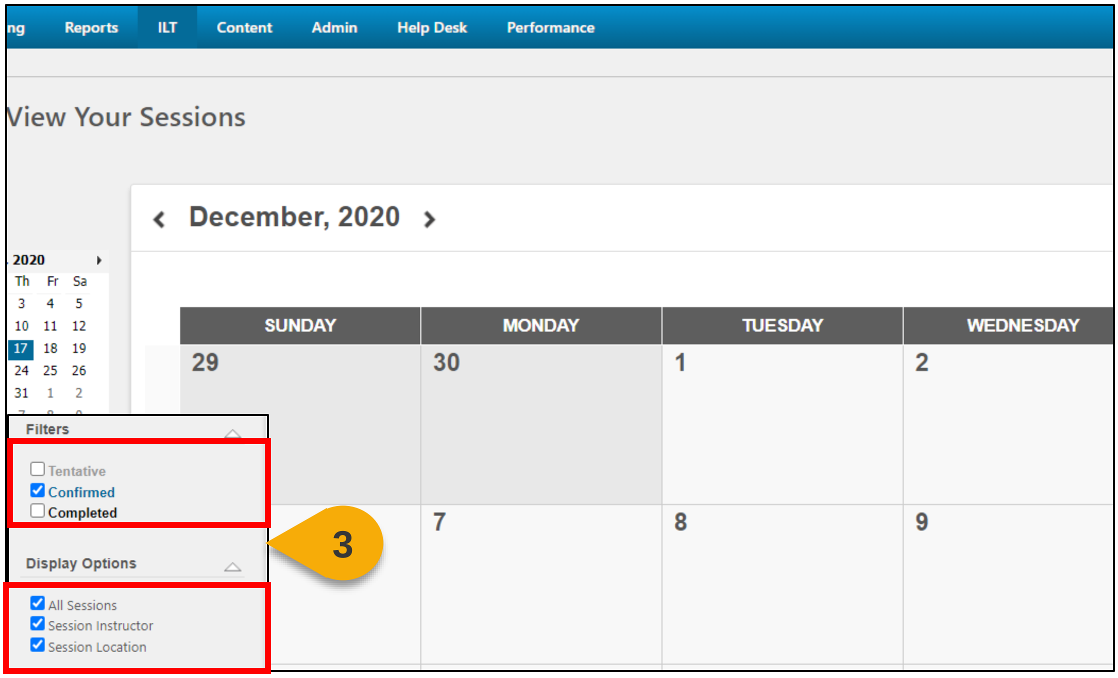
View Upcoming Sessions

When you want to view the Sessions you're an Instructor for…

Steps 1 & 2: Hover over the **ILT** tab and select **View Your Sessions.**



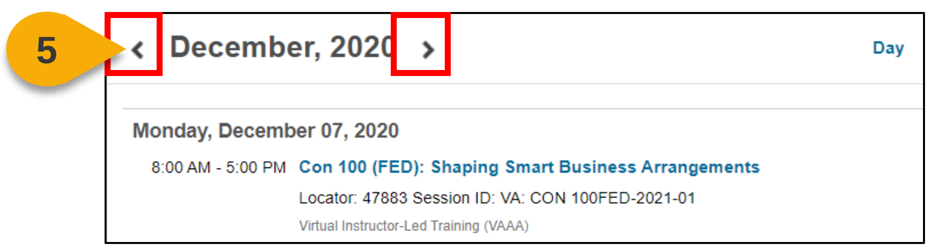
Step 3: You will see the **Calendar** view of your upcoming Sessions and can filter for **Tentative, Confirmed, and Completed Sessions.** You can also change the display options to show **All Instructors, Session Instructor, and Session Location.**



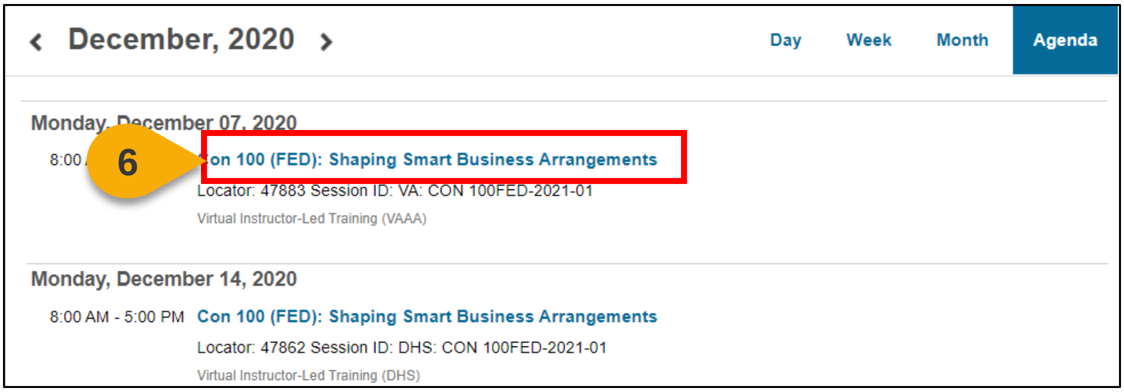
View Upcoming Sessions (Cont.1)

Step 4: Click on the **Agenda tab** to change the view.

Step 5: Use the **arrows** to navigate from month to month.



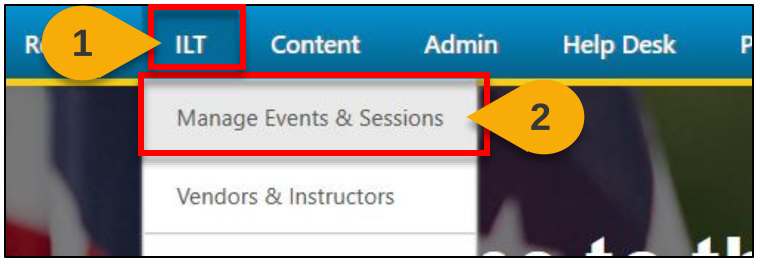
Step 6: Click on the **Event title** to see the information for this Session and access the Roster.



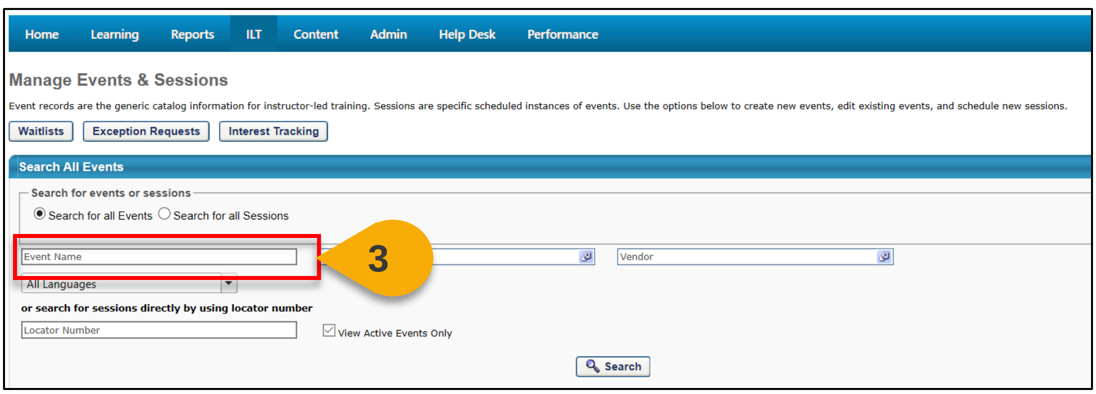
View Session Roster

When you want to view the Roster for an ILT…

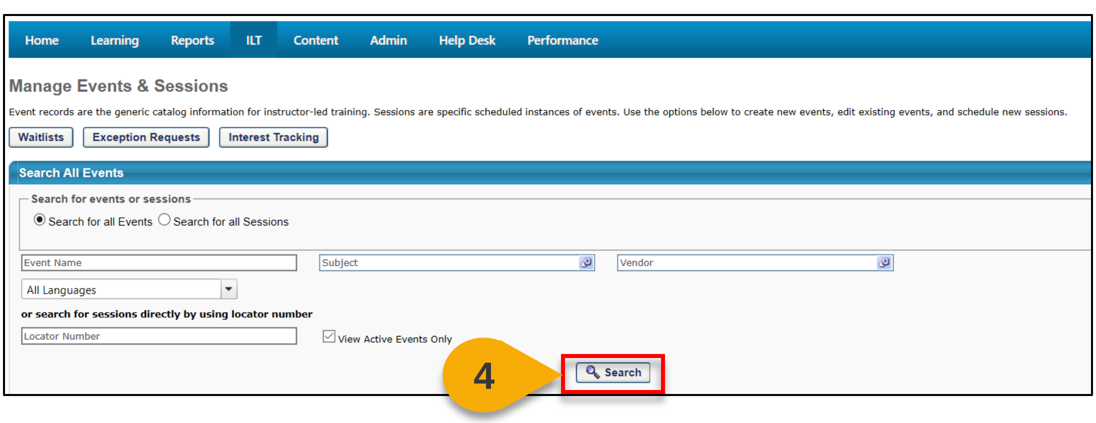
Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events and Sessions.**



Step 3: Search for the Event to which the Session belongs. Enter the **Event Name** into the search field.

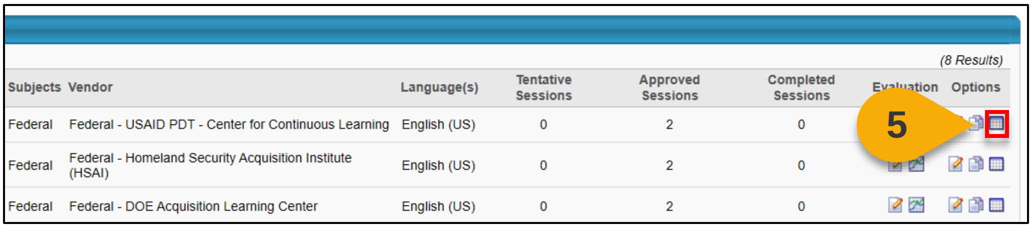


Step 4: Click **Search** or hit **Enter.**

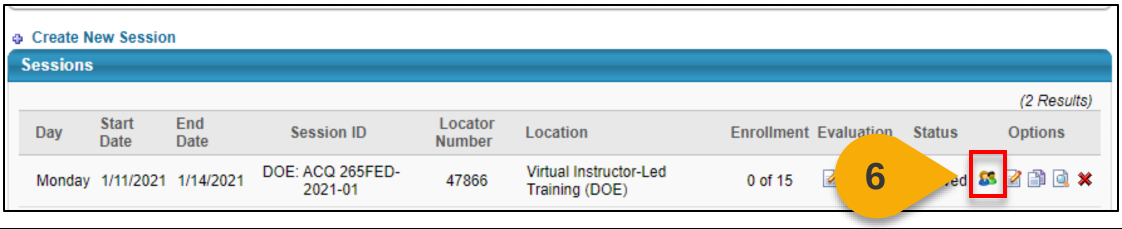


View Session Roster (Cont.1)

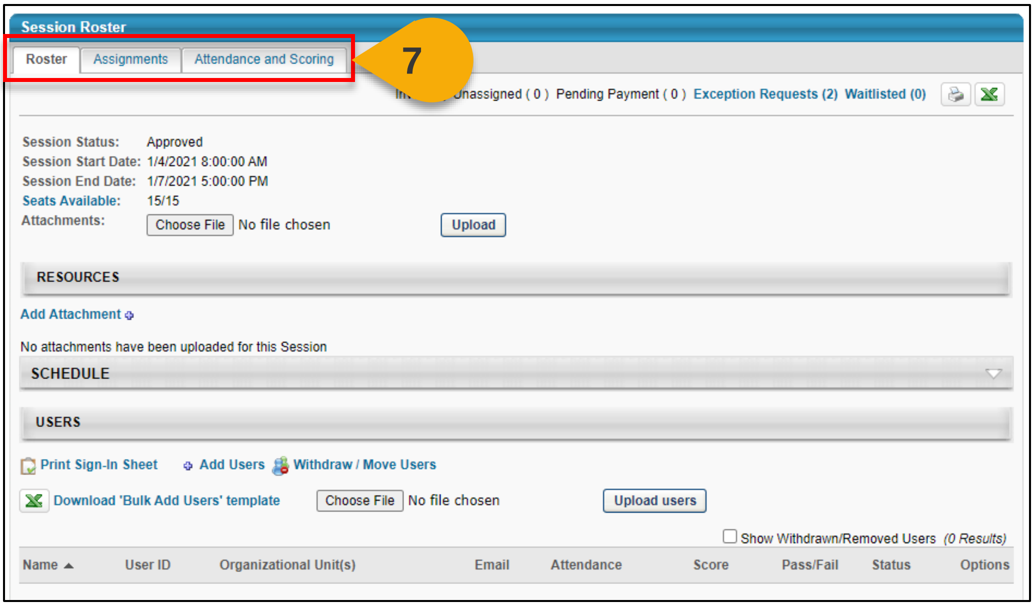
Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



Step 6: Click the **Roster** icon in the Options column to the right of the Session you would like to view the Roster for.



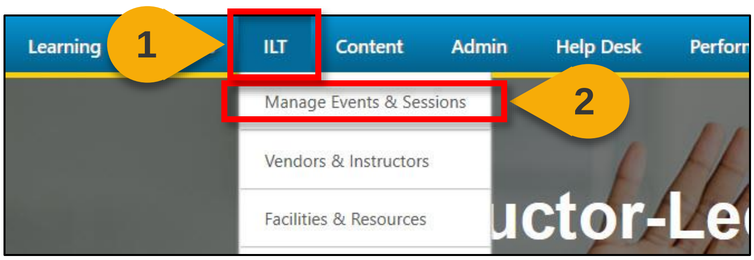
Step 7: From this page, you may **view Users** on the Roster and Waitlist. Additionally, you can manage enrollment and attendance. See the Manage Roster task aid for more information.



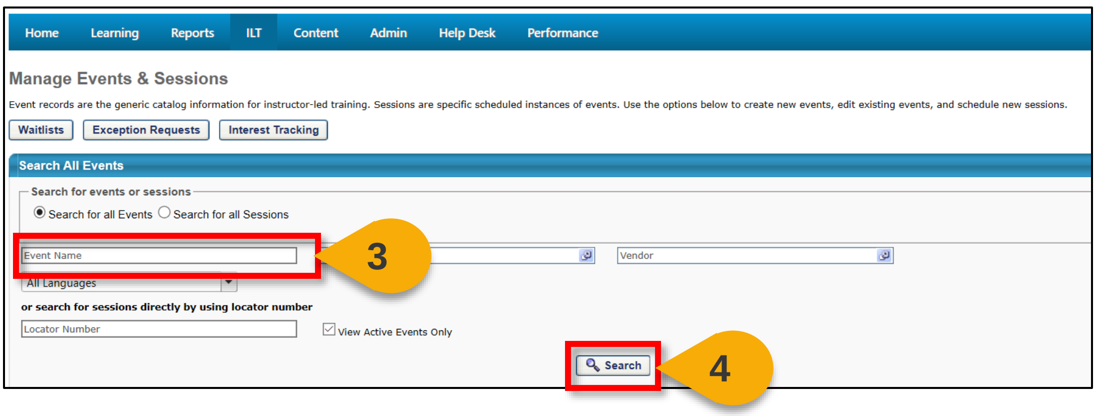
Manage Roster

When you want to edit a Roster…

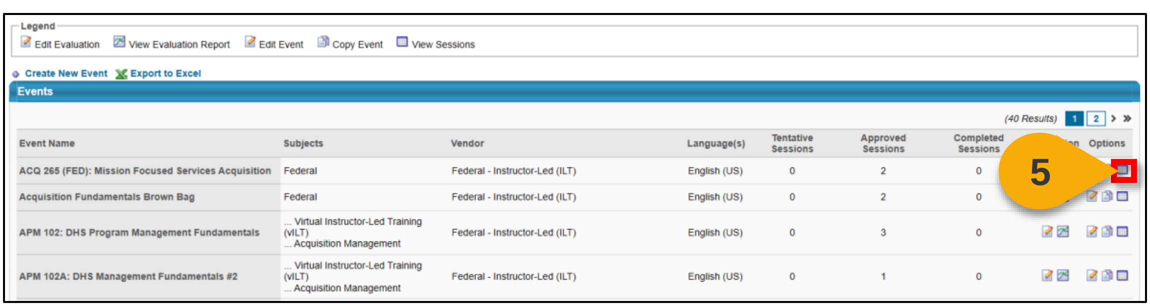
Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events & Sessions.**



Steps 3 & 4: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field. Click Search.

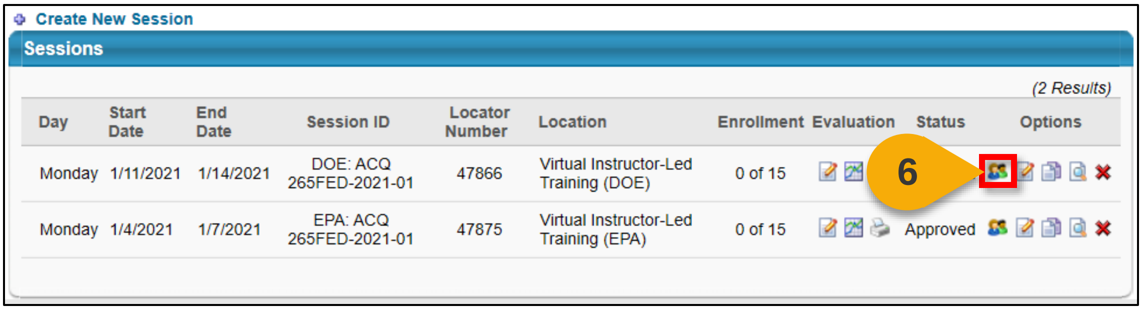


Step 5: Click on the **Calendar** icon to view the Sessions for the Event.

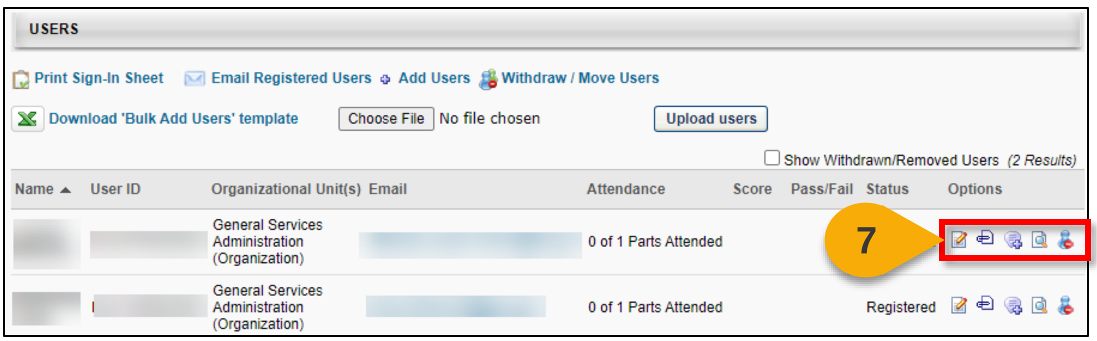


Manage Roster (Cont.1)

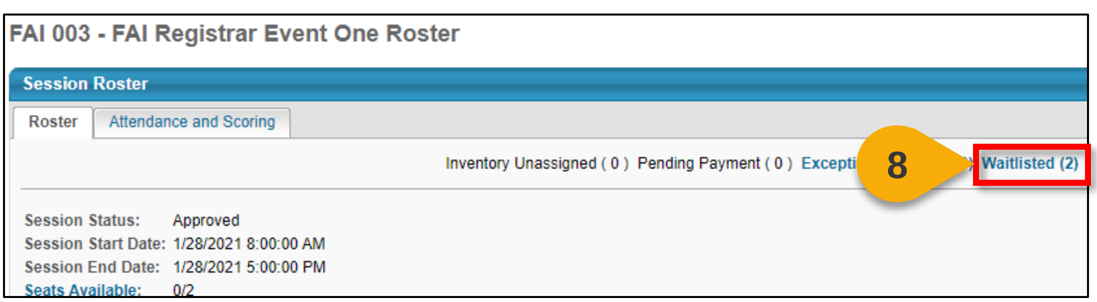
Step 6: Click on the **View Roster** icon to view the Roster.



Step 7: From this page, you may manage the Roster and the Waitlist. In the Users section of the Roster, you will see the Users who have been granted seats in the Session. Use the icons in the **Options** column to edit the User's Transcript, view the user's enrollment history, or remove the User from the Roster.

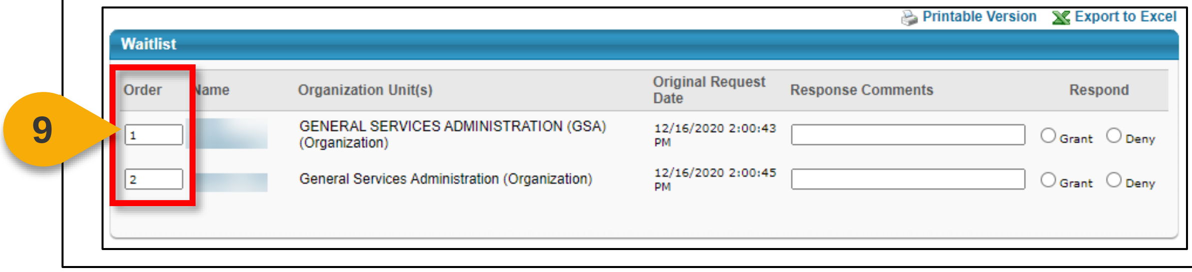


Step 8: See other task aids to learn now to email registered users, withdraw/move users, add users, and complete attendance. Click the **Waitlisted** link to view the Waitlist.

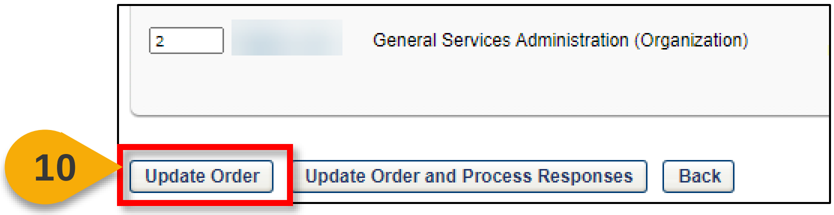


Manage Roster (Cont.2)

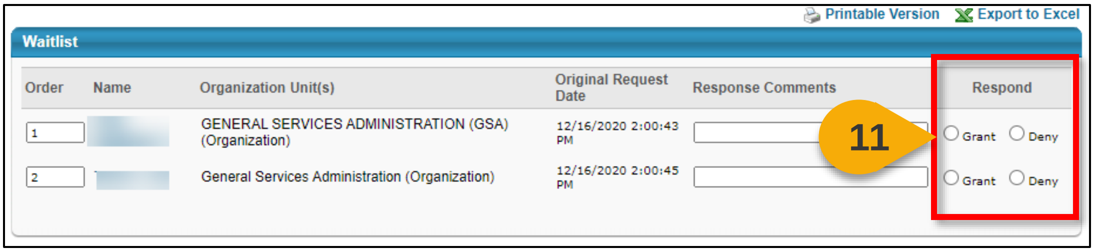
Step 9: The Waitlist will display. Edit Waitlist priority by **changing the numbers** in the Order column. The User with Order 1 will have first priority for an open spot in the course.



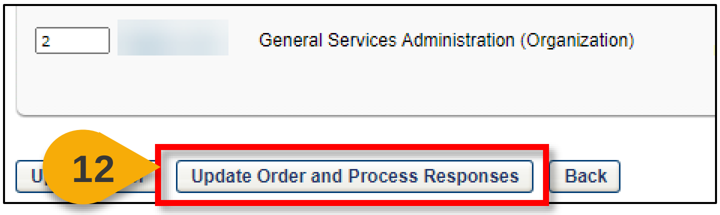
Step 10: Click **Update Order** to save these changes.



Step 11: If you would like add a User to the Roster, select **Grant** in the Respond column. If you would like to remove a user from the Waitlist without granting them a spot in the course, select the **Deny** option in the Respond column.



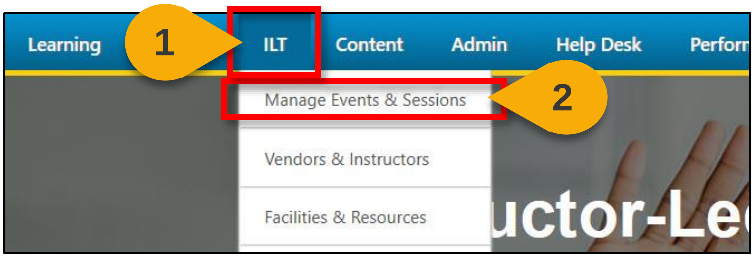
Step 12: Click **Update Order and Process Responses** to save these changes.



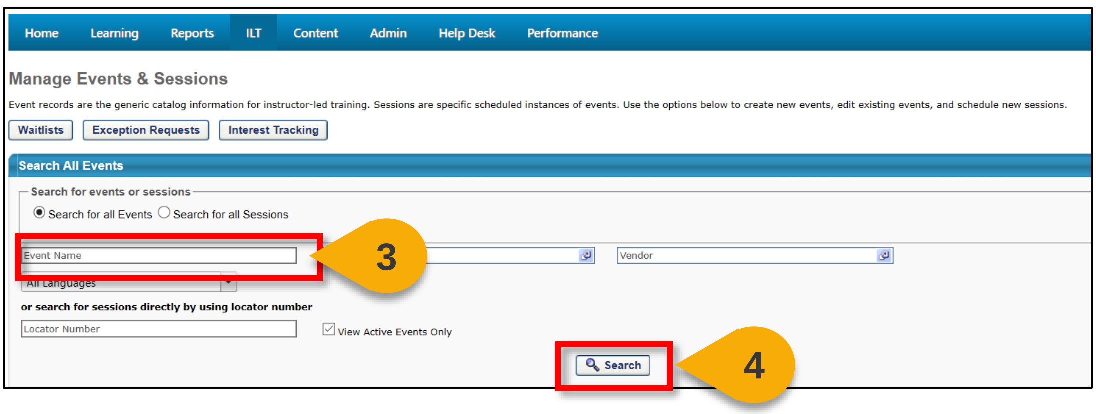
Update Roster via Upload

When you want to upload an updated Roster…

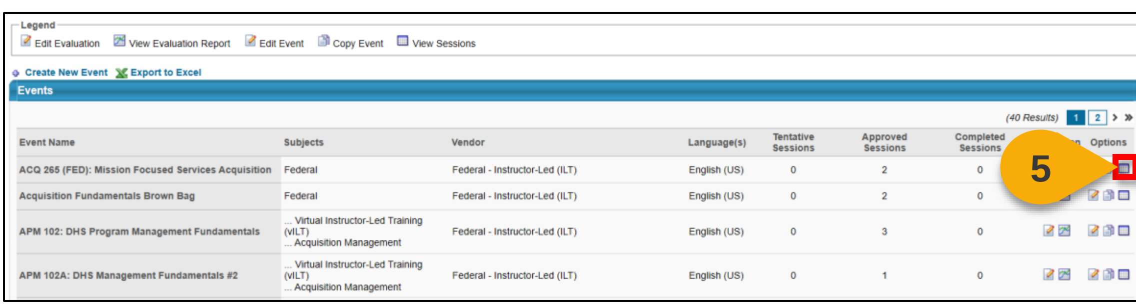
Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events & Sessions.**



Steps 3 & 4: Search for the Event to which the Session will belong. Enter the **Event Name** into the search field. Click **Search**.

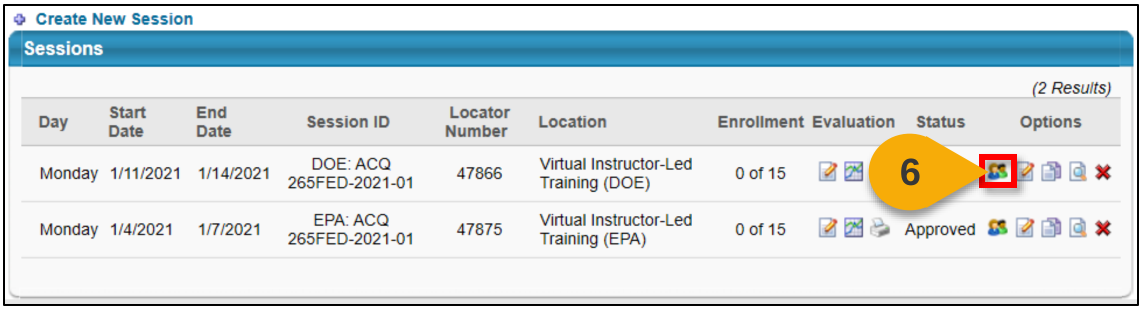


Step 5: Click on the **Calendar** icon to view the sessions for the Event.

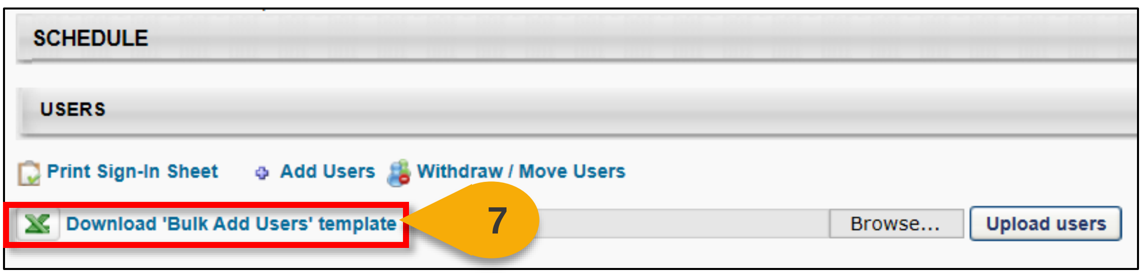


Update Roster via Upload (Cont.1)

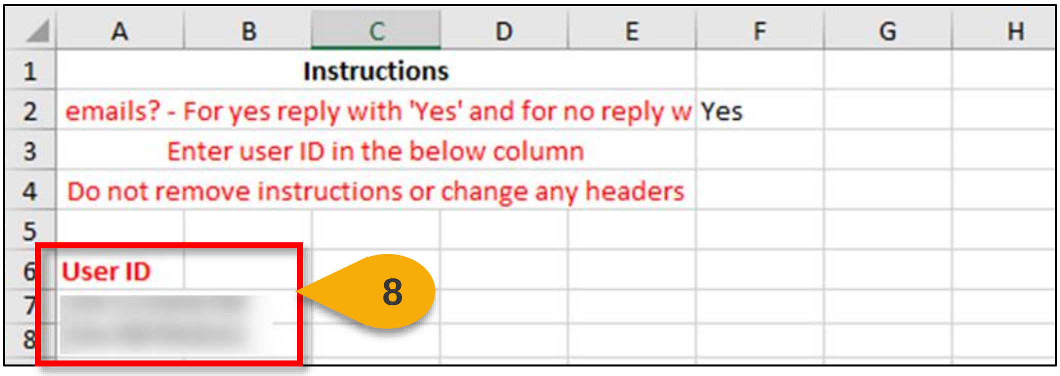
Step 6: Click on the **View Roster icon** for the desired session to see the Roster.



Step 7: Click on **Download 'Bulk Add Users' template**. A Microsoft Excel file will download.

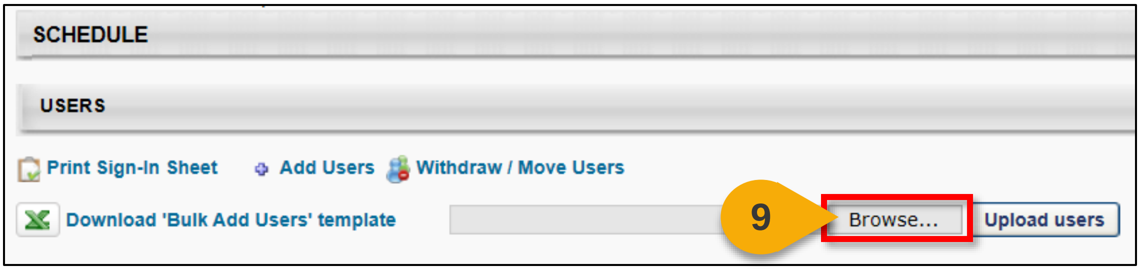


Step 8: Enter the **User ID** of each User you want to add to the Roster into the spreadsheet and save the file.

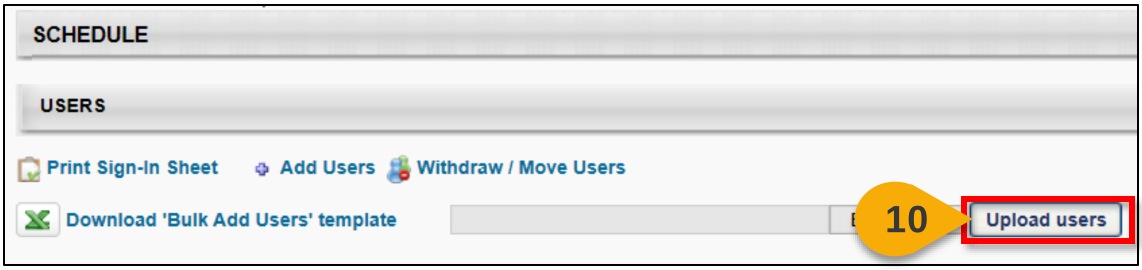


Update Roster via Upload (Cont.2)

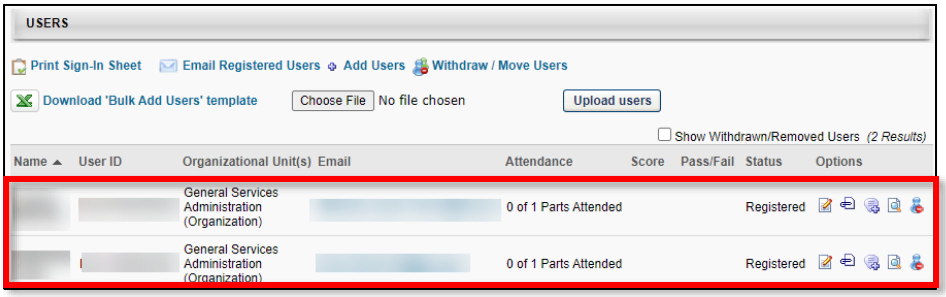
Step 9: On the Roster page, click on **Browse** and choose the Roster file you wish to upload.



Step 10: Click on **Upload Users**.



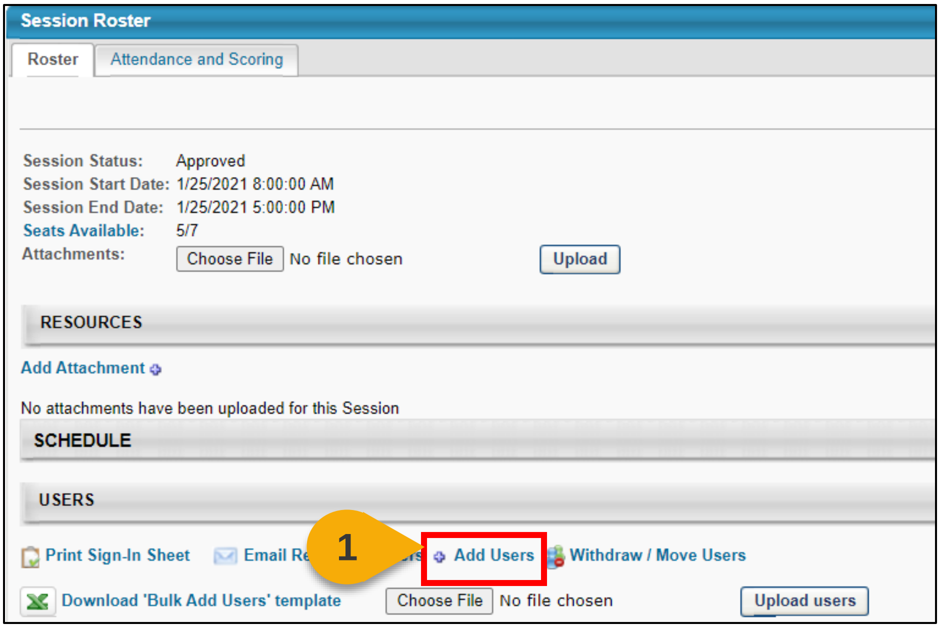
The new Users will appear on the Roster.



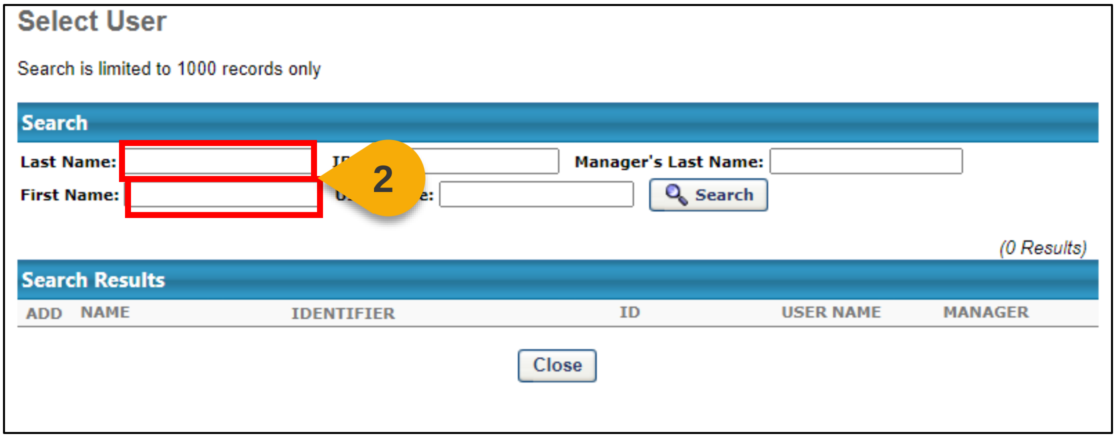
Add Walk-Ins to Roster or Users to Waitlist

When you want to add a User to a Session…

Step 1: Navigate to the Session Roster using the View Session Roster task aid. Click on **Add Users.**

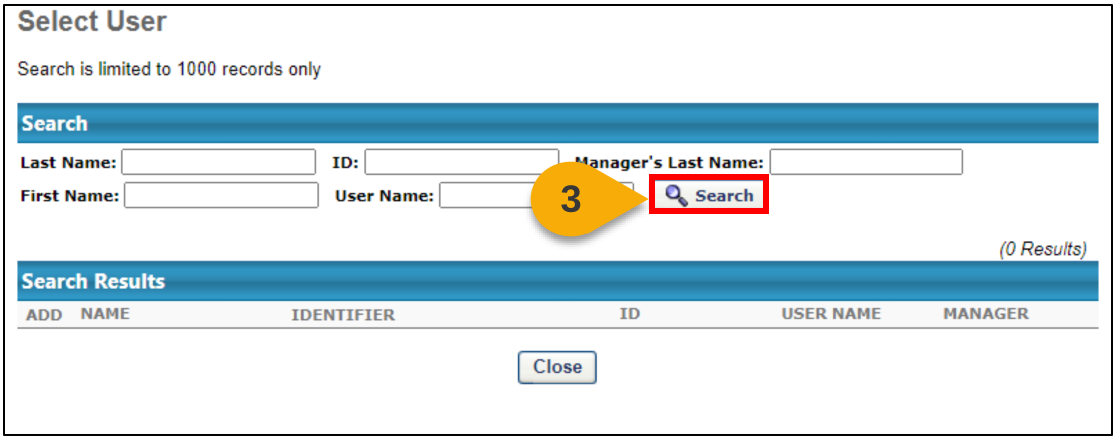


Step 2: A popup will appear. Enter the user's **name** in the appropriate fields. You can also search by User ID, User Name, or Manager's Last Name.

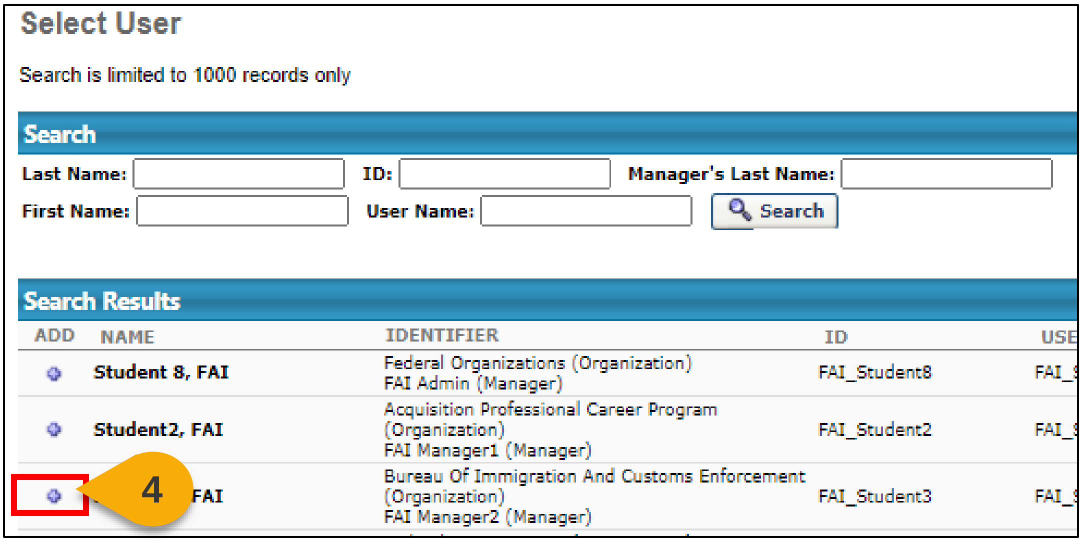


Add Walk-Ins to Roster or Users to Waitlist (Cont.1)

Step 3: Click **Search.**

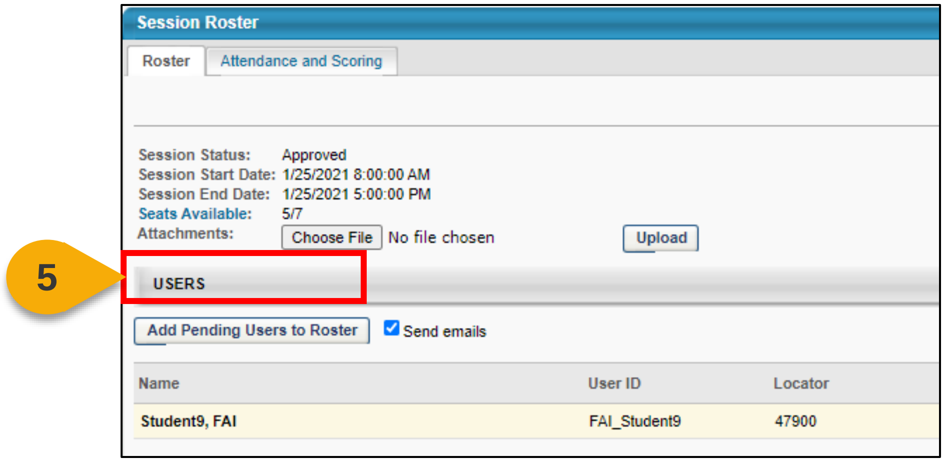


Step 4: Select the **blue plus sign** next to the user you'd like to add to the Roster.

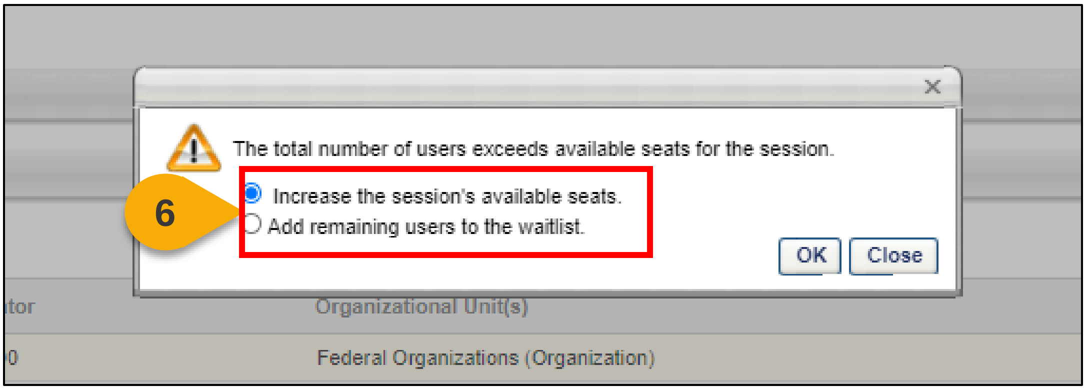


Add Walk-Ins to Roster or Users to Waitlist (Cont.2)

Step 5: The user will appear under the **Users** section. Click **Add Pending Users to Roster.** This button will bypass any approval workflows and add the person to the roster as registered.

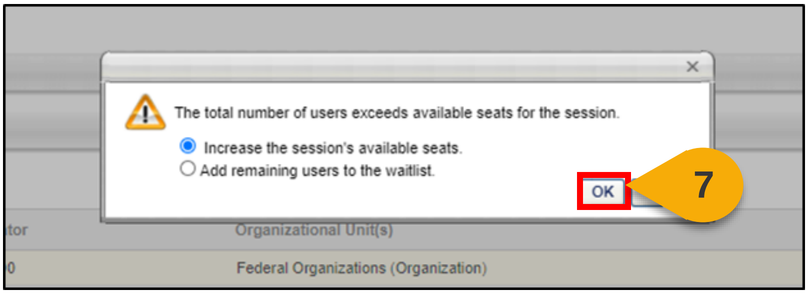


Step 6: If the Roster is full or if you are adding users who fall outside the Enrollment Restrictions, a popup will appear with a warning message. You have the option to either **Increase the Session's available seats** or **Add remaining users to the waitlist.**

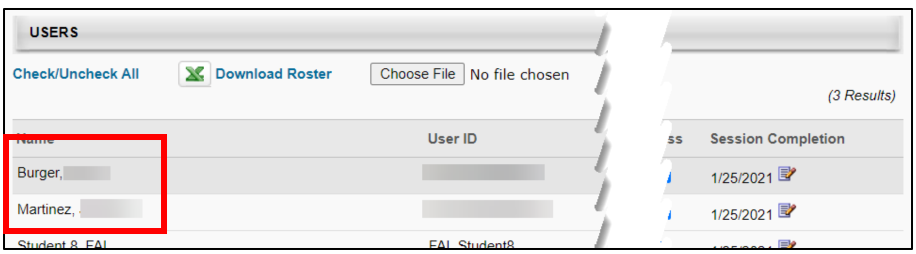


Add Walk-Ins to Roster or Users to Waitlist (Cont.3)

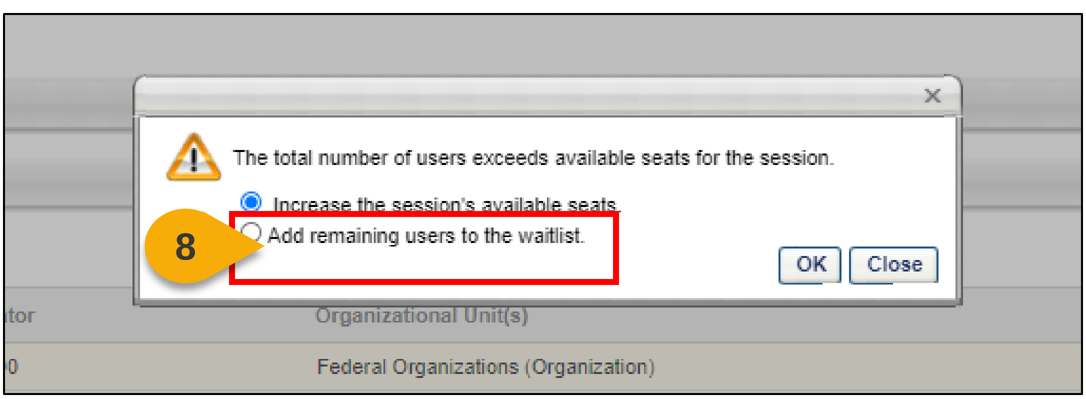
Step 7: After choosing your preferred option, select **OK.**



You will be taken back to the Roster and if you added the User, they would appear on the User list.

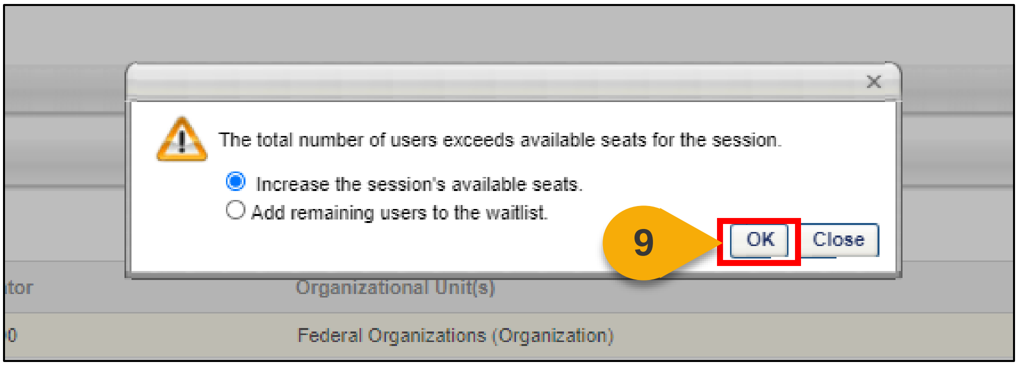


Step 8: If you want to add users to the waitlist, follow the same process for adding a walk in to the Roster. Then select **Add Remaining Users to the waitlist.**

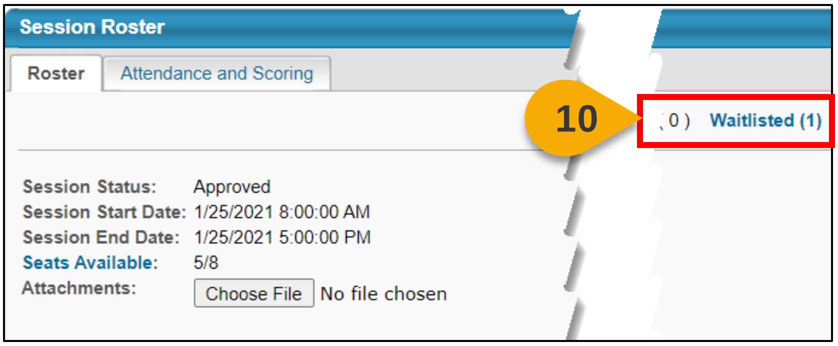


Add Walk-Ins to Roster or Users to Waitlist (Cont.4)

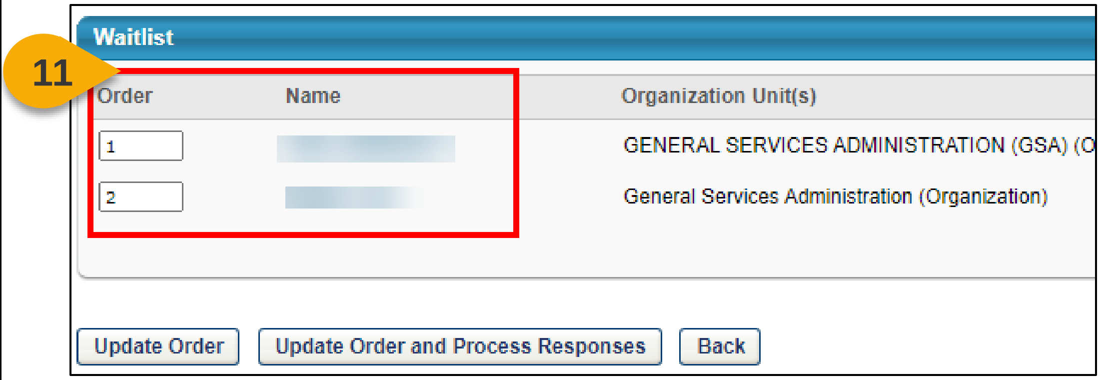
Step 9: Click **OK.**



Step 10: The user will then be added to the waitlist. Click on the **Waitlisted** to access the Waitlist for this Session.



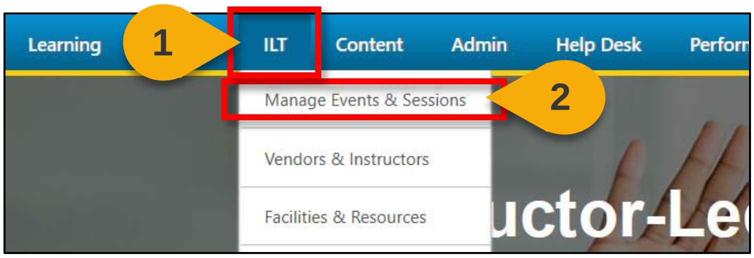
Step 11: The Waitlist page will show **all Users** on the Waitlist and allow for editing of student's priority order on the Waitlist.



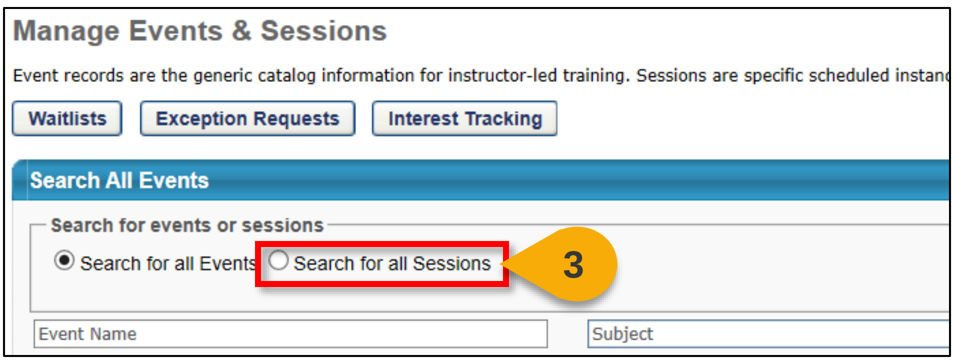
Upload Attendance

When you want to upload an attendance sheet to the Roster…

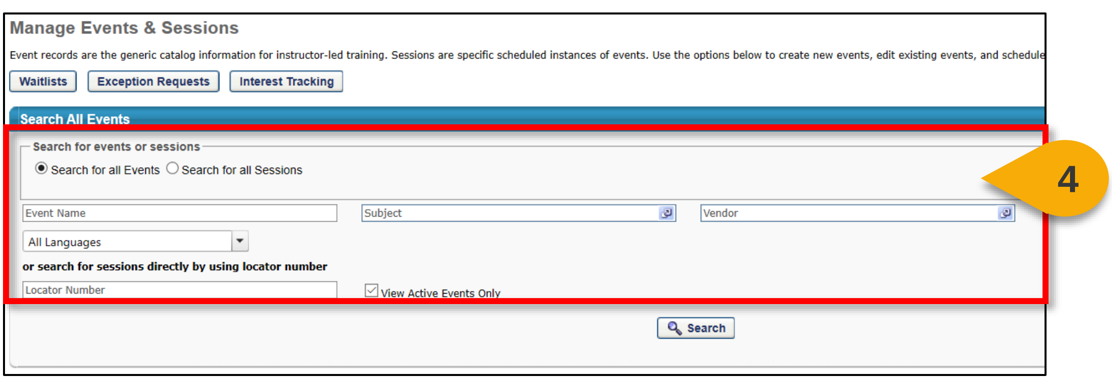
Steps 1 & 2: Hover over ILT, then select **Manage Events & Sessions.**



Step 3: Select **Search for all Sessions.**

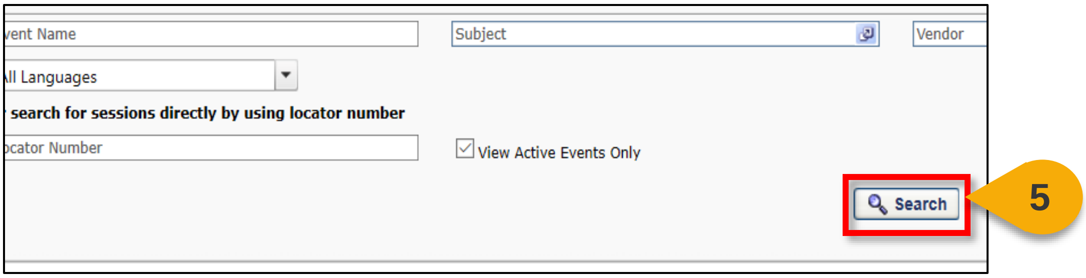


Step 4: Enter the search criteria for the Session.

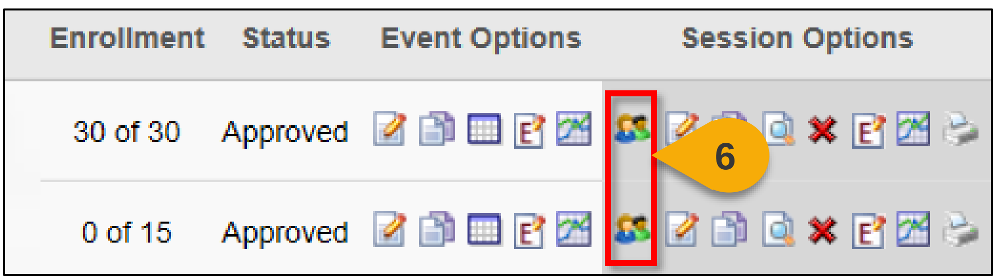


Upload Attendance (Cont.1)

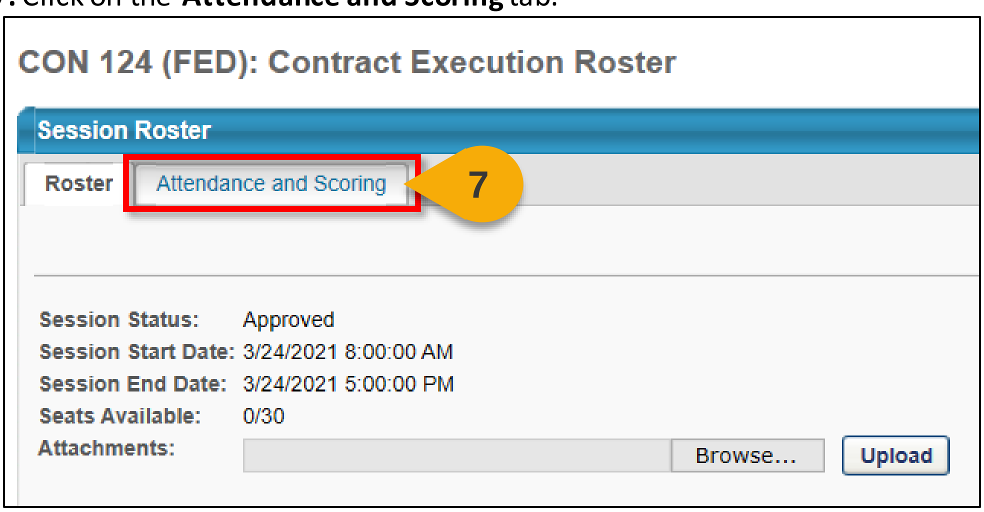
Step 5: Click **Search**.



Step 6: Click on the **Users icon** under the **Session Options** column of the session of your choice**.**

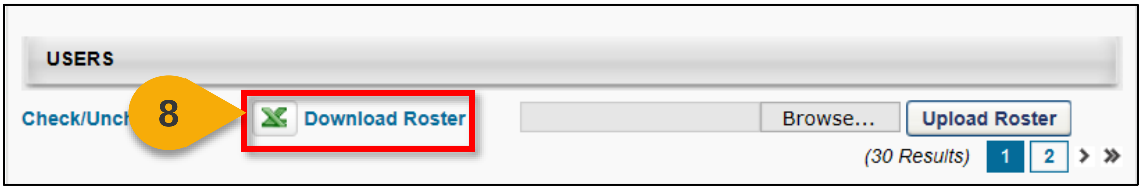


Step 7: Click on the **Attendance and Scoring** tab.

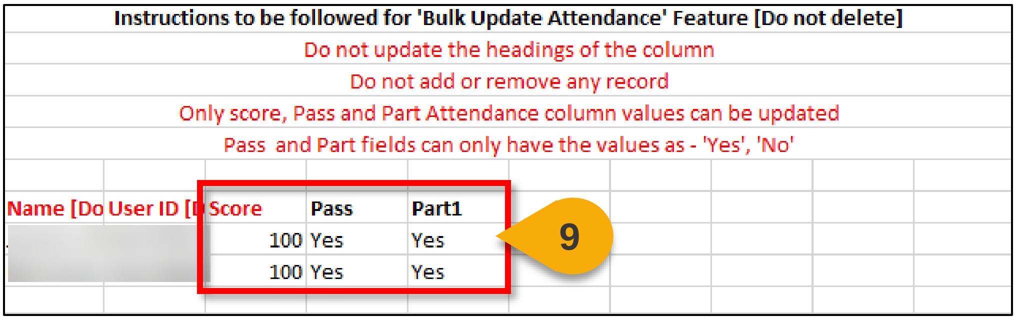


Upload Attendance (Cont.2)

Step 8: Click on **Download Roster**. The file will download to your computer.

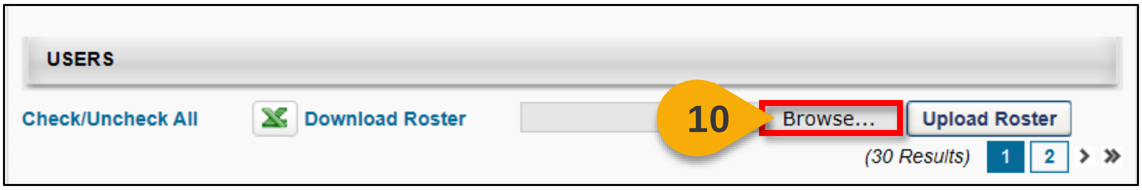


Step 9: In the Excel file you downloaded, update the **Score, Pass, and Part Attendance** columns for each user. Save the file.

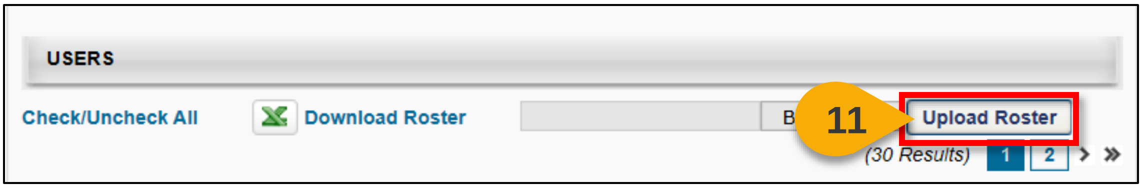


Instructions to be followed for 'Bulk Update Attendance' Feature [Do not delete]				
Do not update the headings of the column				
Do not add or remove any record				
Only score, Pass and Part Attendance column values can be updated				
Pass and Part fields can only have the values as - 'Yes', 'No'				
Name [Do	User ID [I	Score	Pass	Part1
		100	Yes	Yes
		100	Yes	Yes

Step 10: On the Roster page, click on **Browse** and select the attendance sheet you would like to upload.

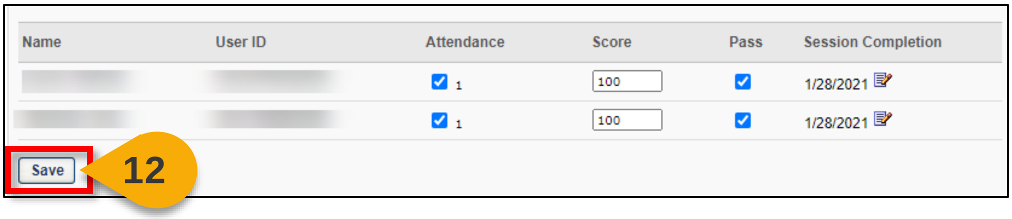


Step 11: Click on **Upload Roster.** The attendance sheet will then be uploaded.

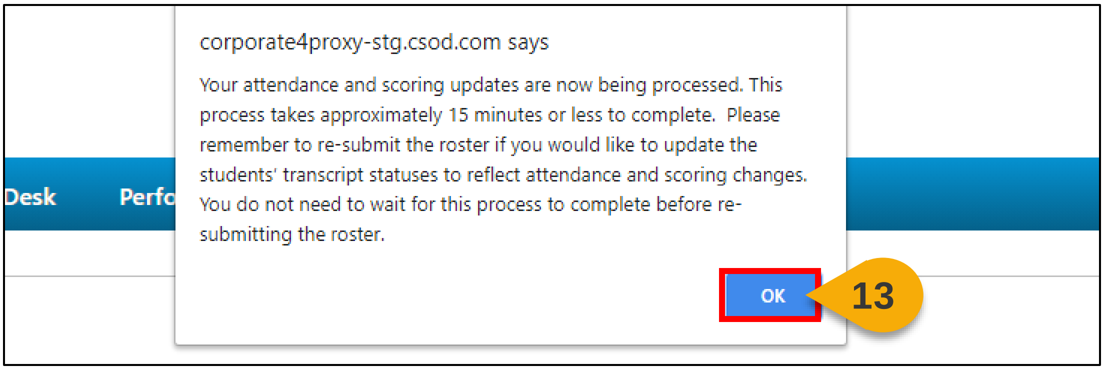


Upload Attendance (Cont.3)

Step 12: The Attendance page will update. Click **Save** to save the updated attendance.



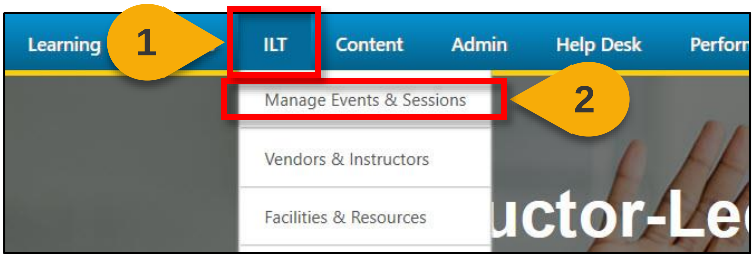
Step 13: A popup will appear to notify you that the attendance is being updated and that the process will take about 15 minutes. Click **Ok.**



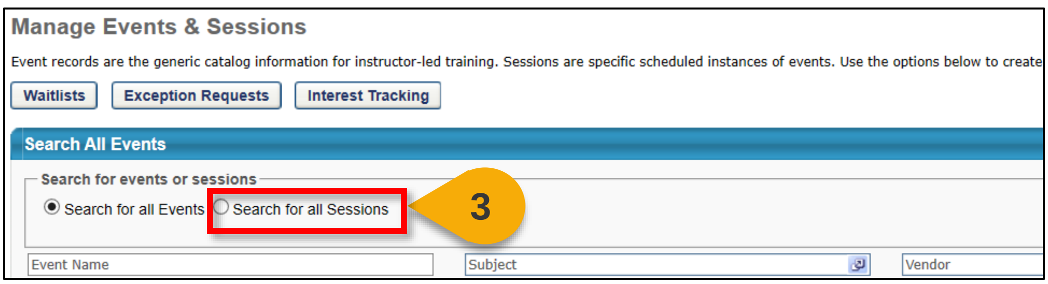
Manually Complete Attendance

When you want to manually update attendance in the Roster…

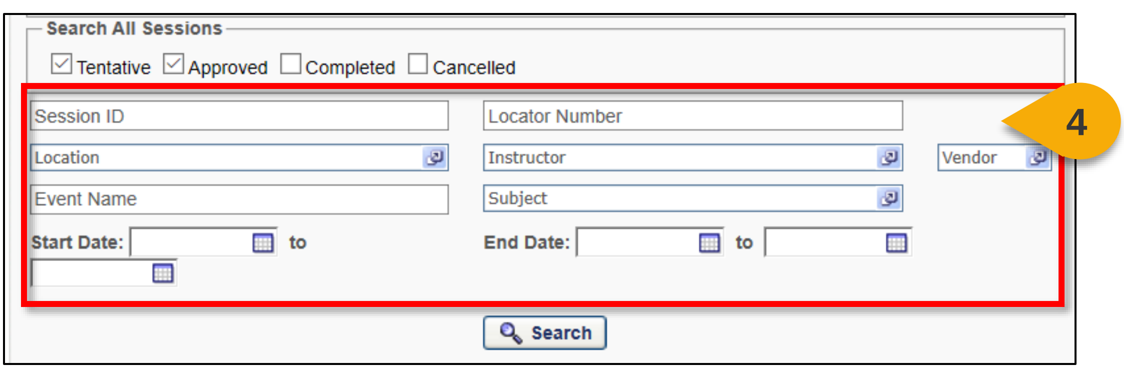
Steps 1 & 2: Hover over ILT, then select **Manage Events & Sessions.**



Step 3: Select **Search for all Sessions.**

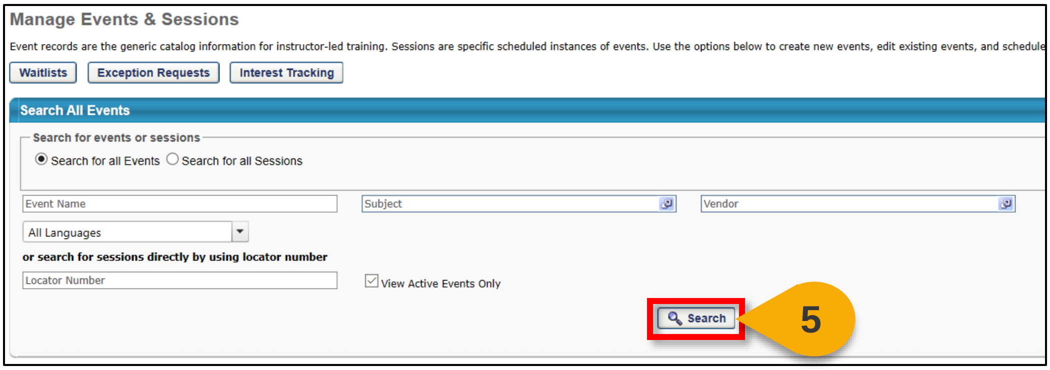


Step 4: Fill out the search criteria for the Session you wish to view.

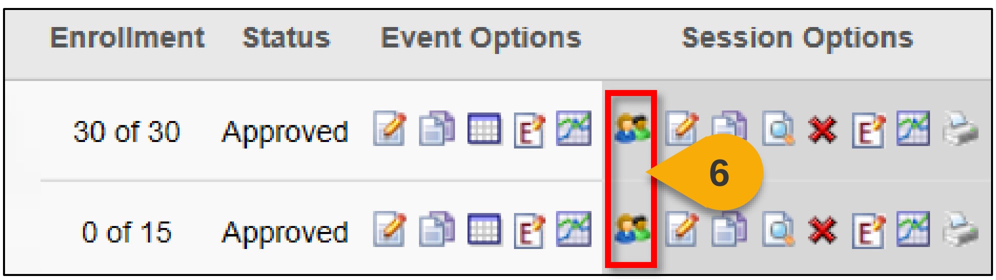


Manually Complete Attendance (Cont.1)

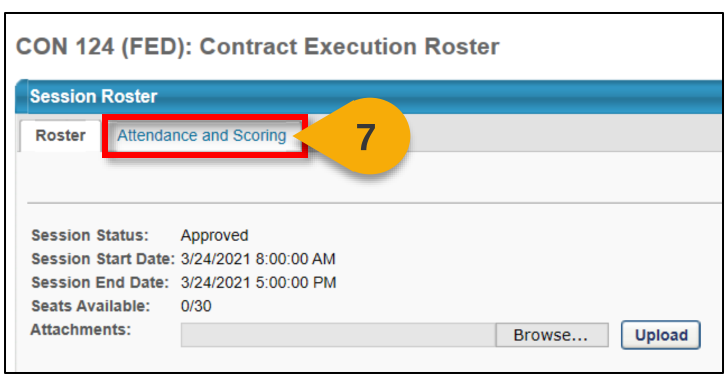
Step 5: Click **Search**.



Step 6: Click the **Users icon** under the Options column of the session of your choice.

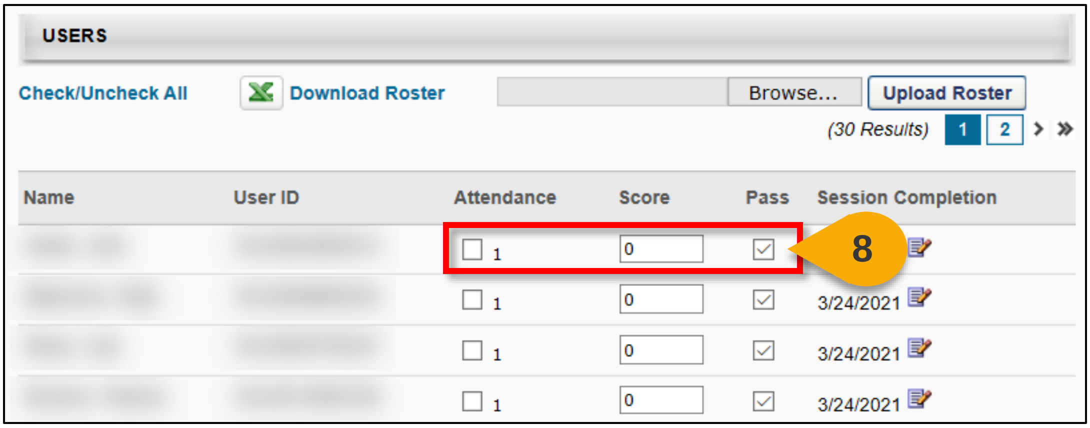


Step 7: Click the **Attendance and Scoring** tab.

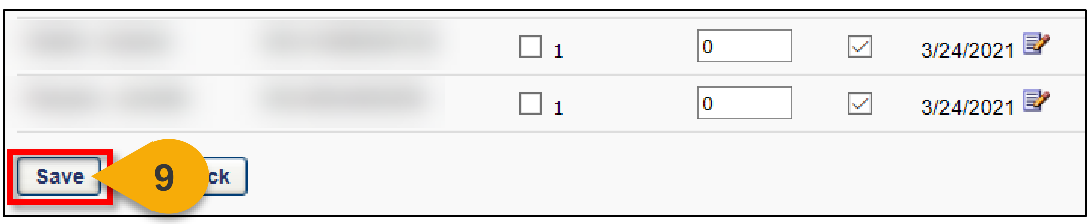


Manually Complete Attendance (Cont.2)

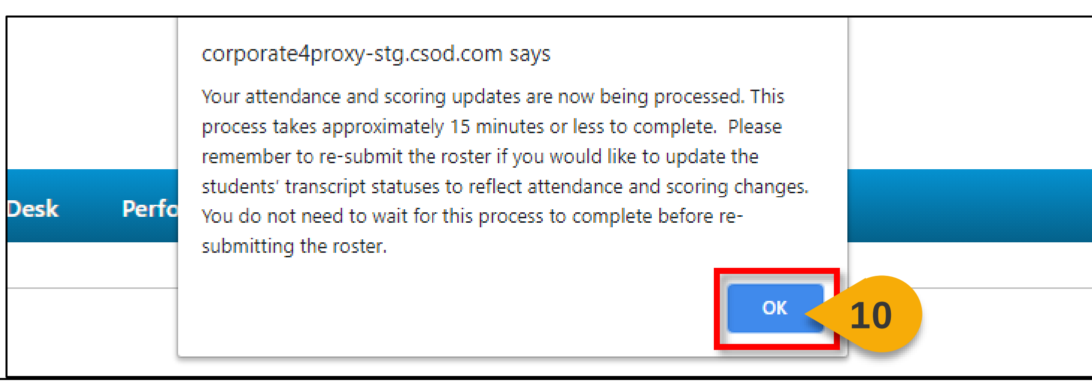
Step 8: For each user, mark the **Attendance, Score,** and **Pass** columns to update attendance.



Step 9 Click **Save.** The Roster's attendance will now be updated.



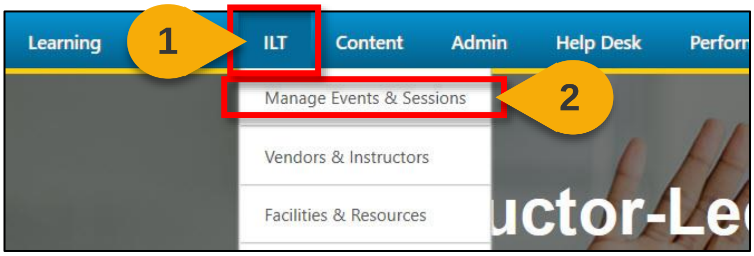
Step 10: A popup will appear to notify you that the attendance is being updated and that the process will take about 15 minutes. Click **Ok.**



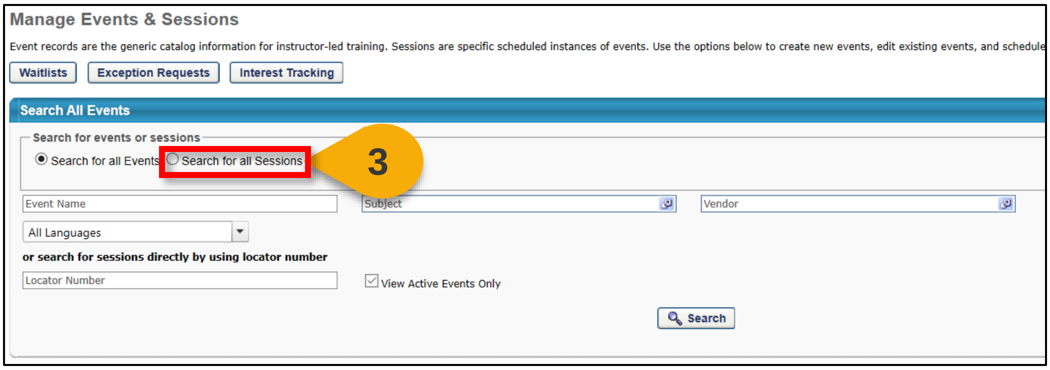
Move Users Between Sessions

When you want to move a User to another Session…

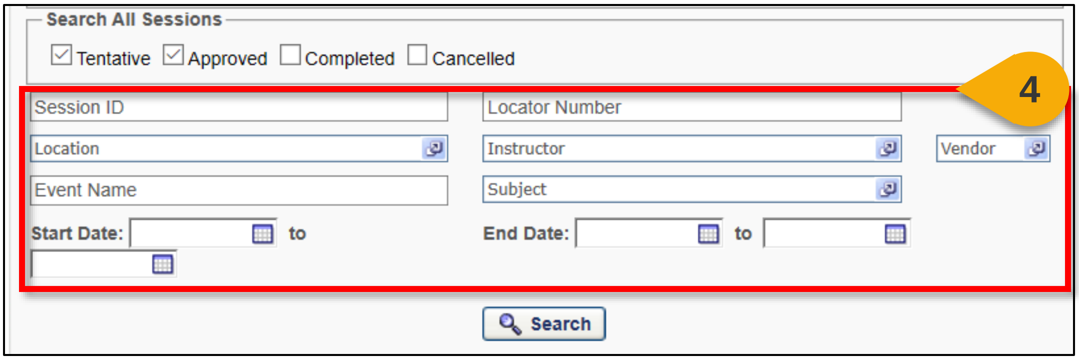
Steps 1 & 2: Hover over ILT, then select **Manage Events & Sessions.**



Step 3: Click on **Search for all Sessions.**

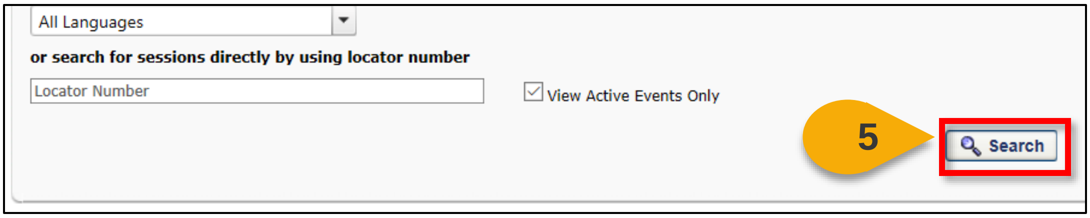


Step 4: Fill out the **search criteria** for the Session you wish to find.

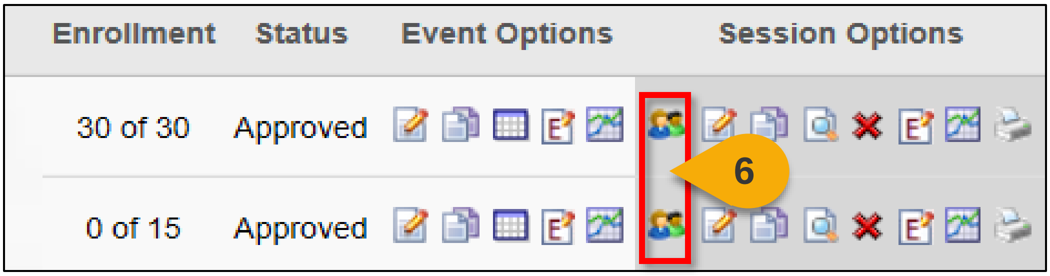


Move Users Between Sessions (Cont.1)

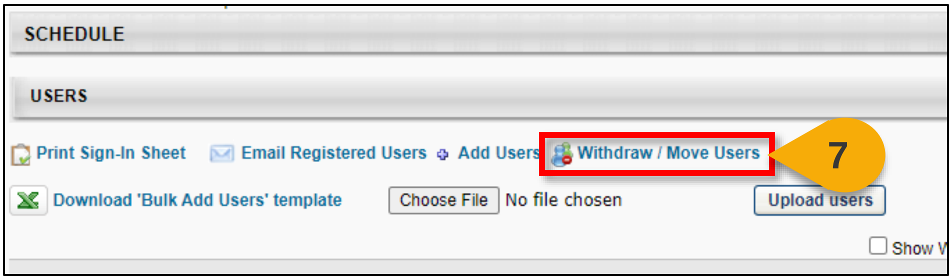
Step 5: Click **Search**.



Step 6: Click on the **Users icon** under the Options column of the session of your choice**.**

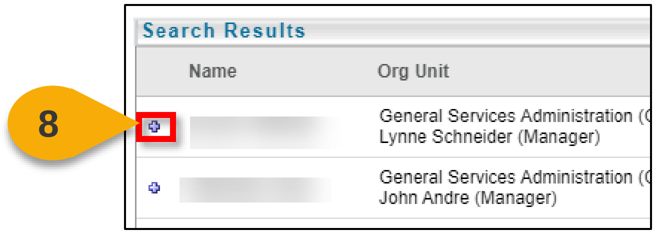


Step 7: In the Users panel, click the **Withdraw/Move Users** link.

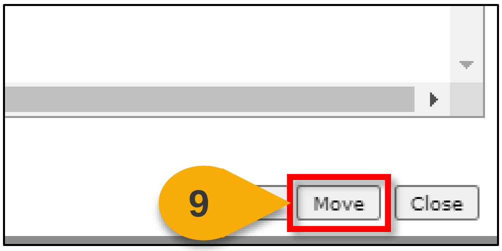


Move Users Between Sessions (Cont.2)

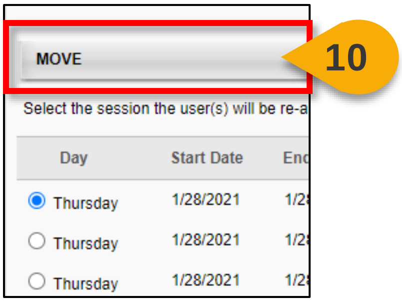
Step 8: In the Withdraw/Move Users window, click the **blue +** next to the Users you wish to move to different Session.



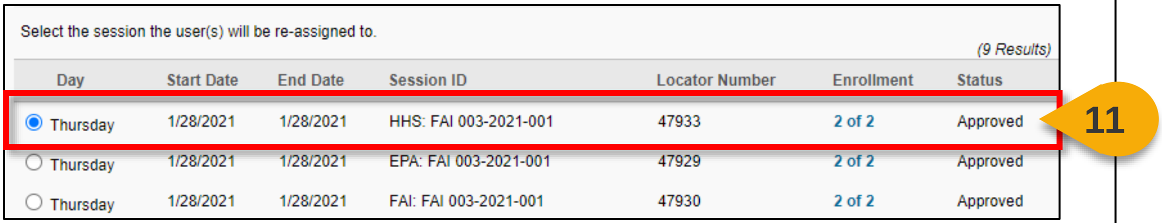
Step 9: After you have selected the desired Users, click **Move** at the bottom of the window.



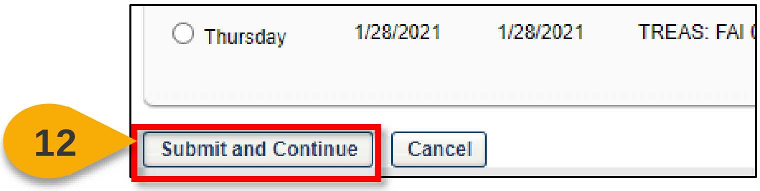
Step 10: A new window will open. Scroll down to the **Move** section.



Step 11: Select **the Session** you would like to move the User(s) to.

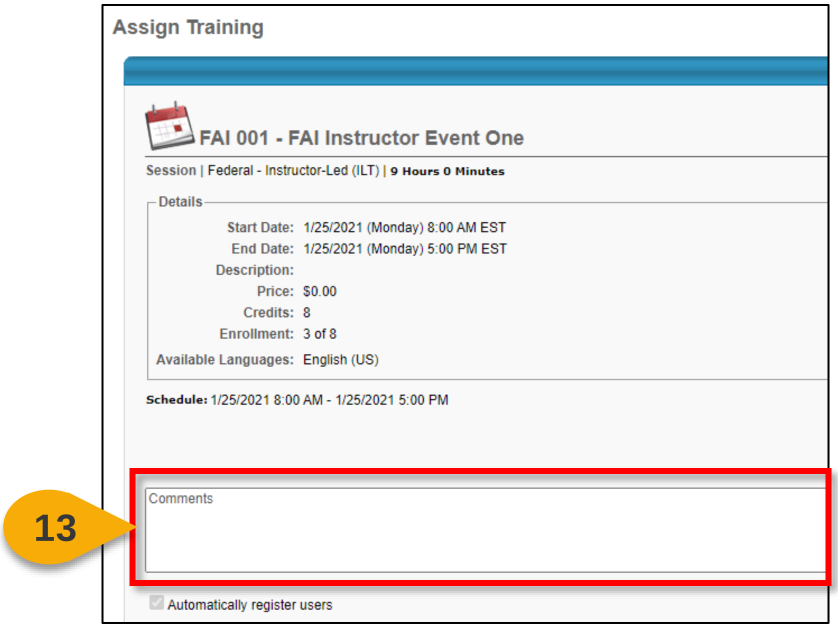


Step 12: Click **Submit and Continue**.

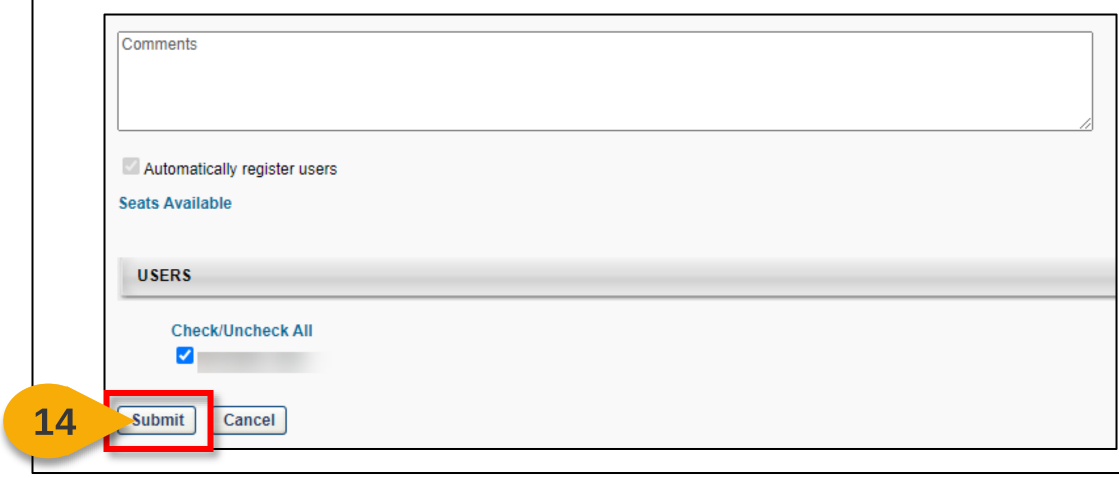


Move Users Between Sessions (Cont.3)

Step 13: You will then need to assign the new training to the User. Add any **comments** on the Assign Training screen.



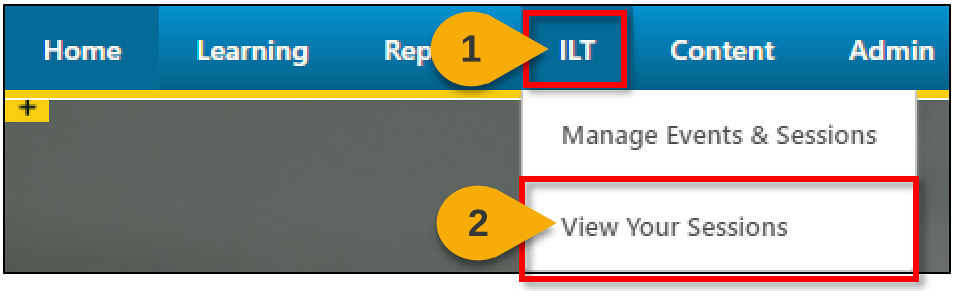
Step 14: Click **Submit** to enroll the User in the new Session. The User will now appear on the new Roster.



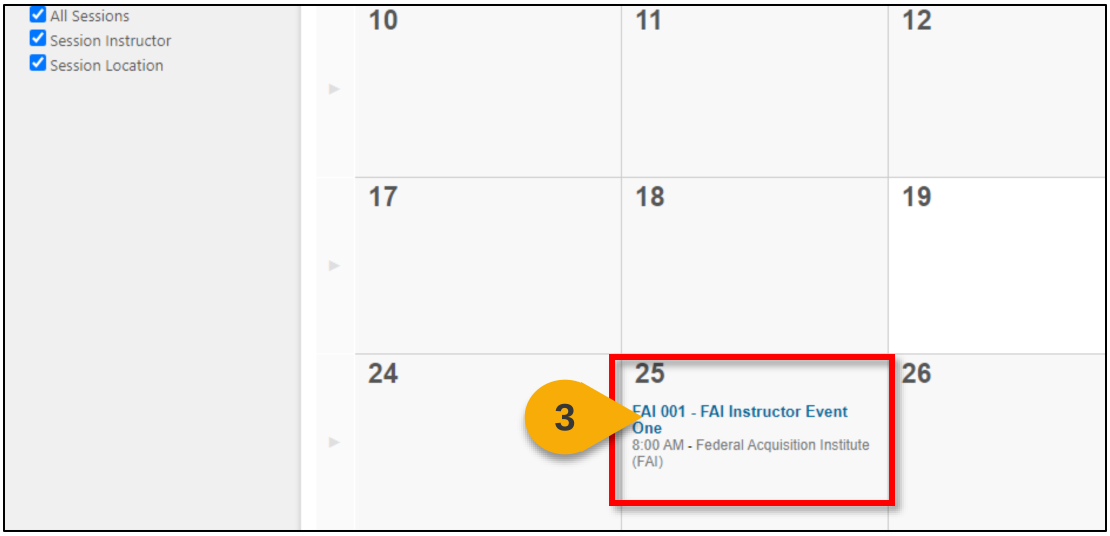
Send Emails from Roster

When you need to email students enrolled in a Session…

Steps 1 & 2: Hover over the **ILT** tab and select **View Your Sessions.**

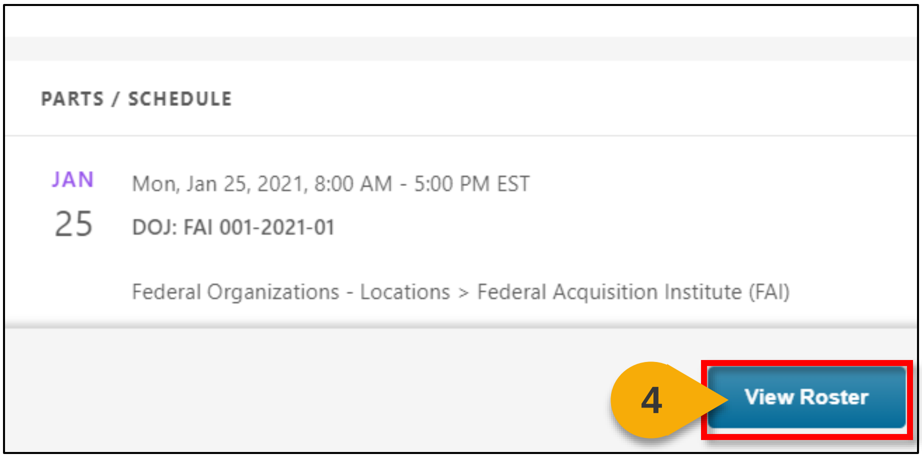


Step 3: Click the **Session** you wish to view the Roster for.

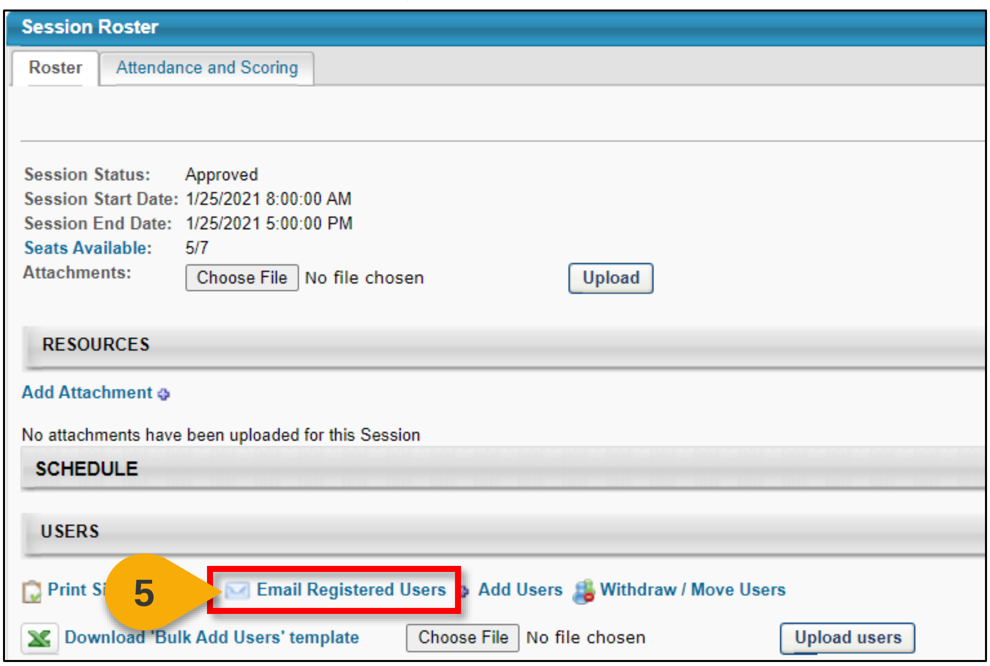


Send Emails from Roster (Cont.1)

Step 4: Click on **View Roster** to view the Roster for this Session.

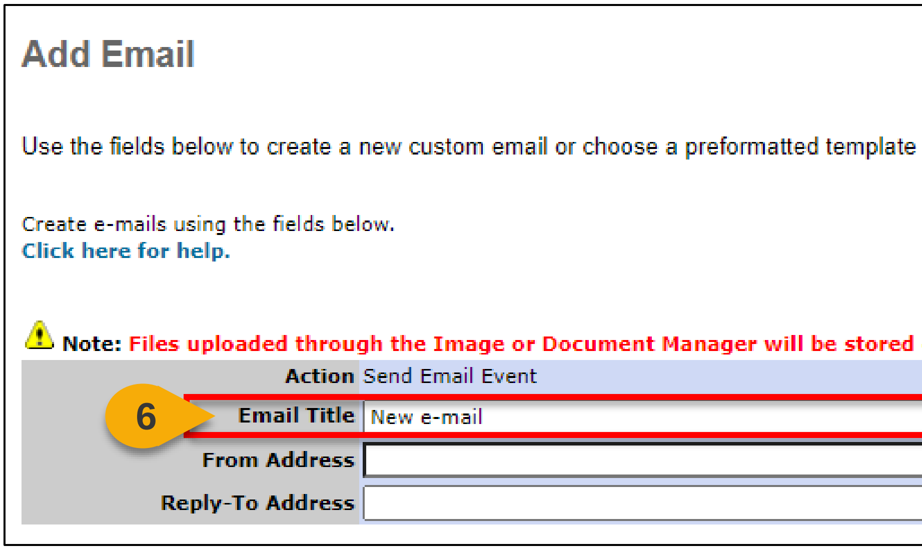


Step 5: On the Roster, click **Email Registered Users.**

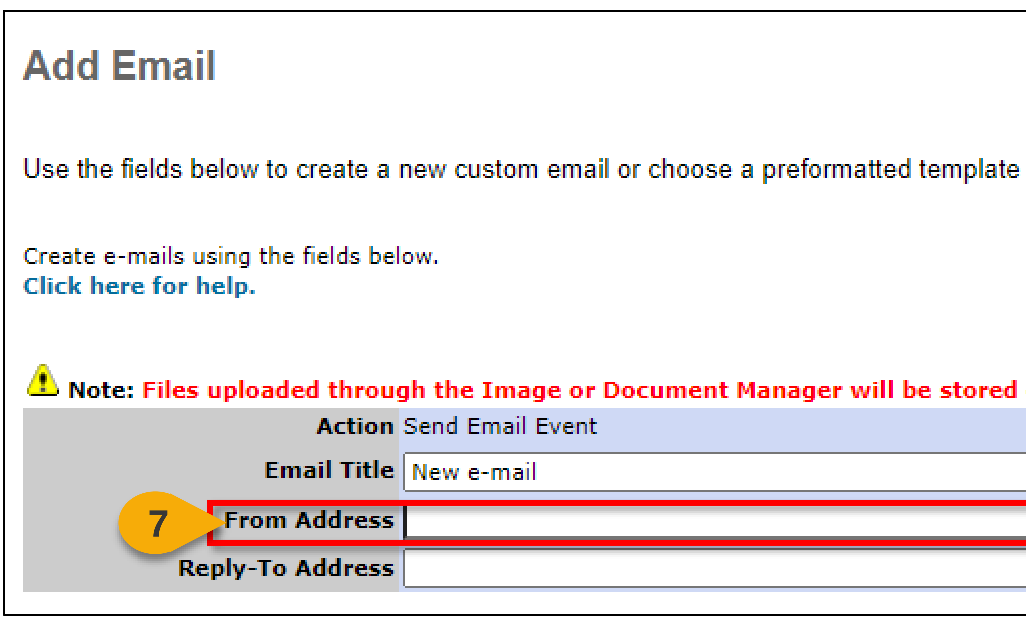


Send Emails from Roster (Cont.2)

Step 6: Enter an **Email Title** to give a description of the nature of this email.

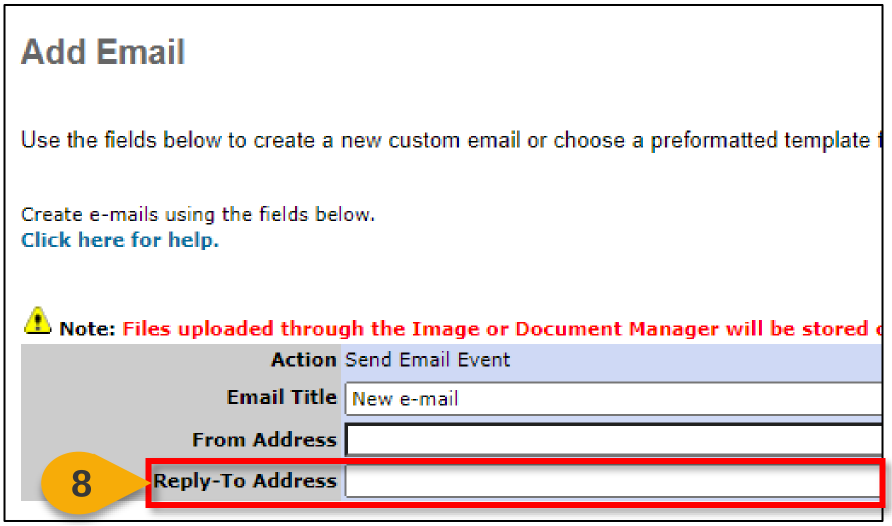


Step 7: Enter a **From Address**.

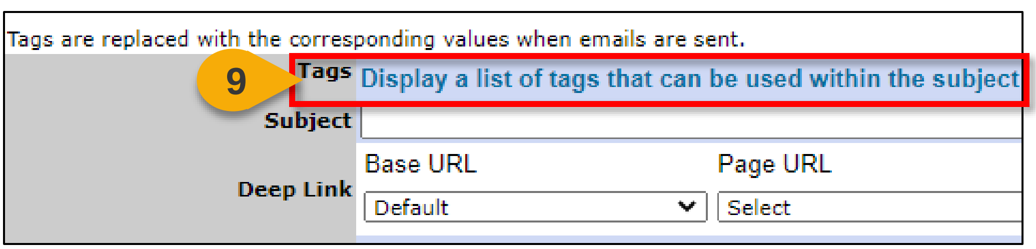


Send Emails from Roster (Cont.3)

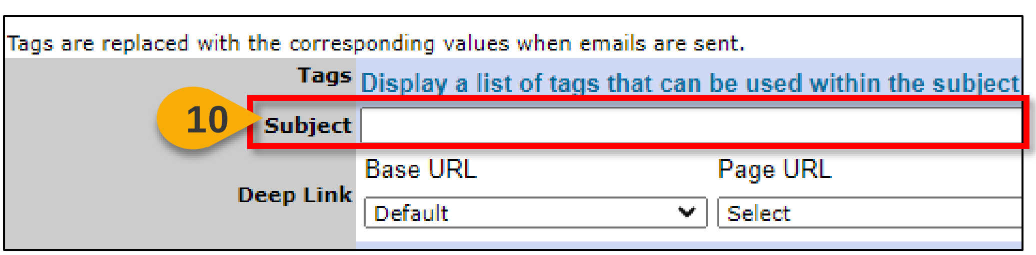
Step 8: Enter a **Reply-To Address** which recipients can respond.



Step 9: Click **Display a list of tags that can be used within the subject** to show a list of available tags you can use in the Subject and Body of the email.

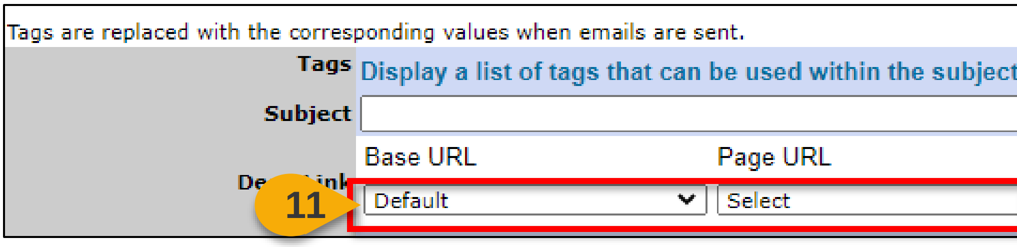


Step 10: Input the **Subject** of your email.

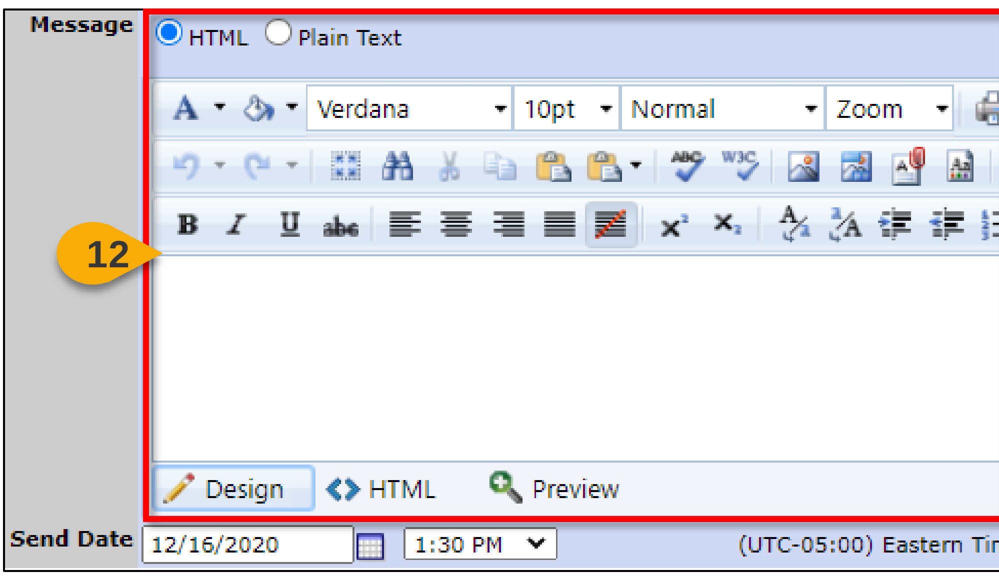


Send Emails from Roster (Cont.4)

Step 11: Use the **Deep Link dropdown** options to create a link to a page in CSOD.

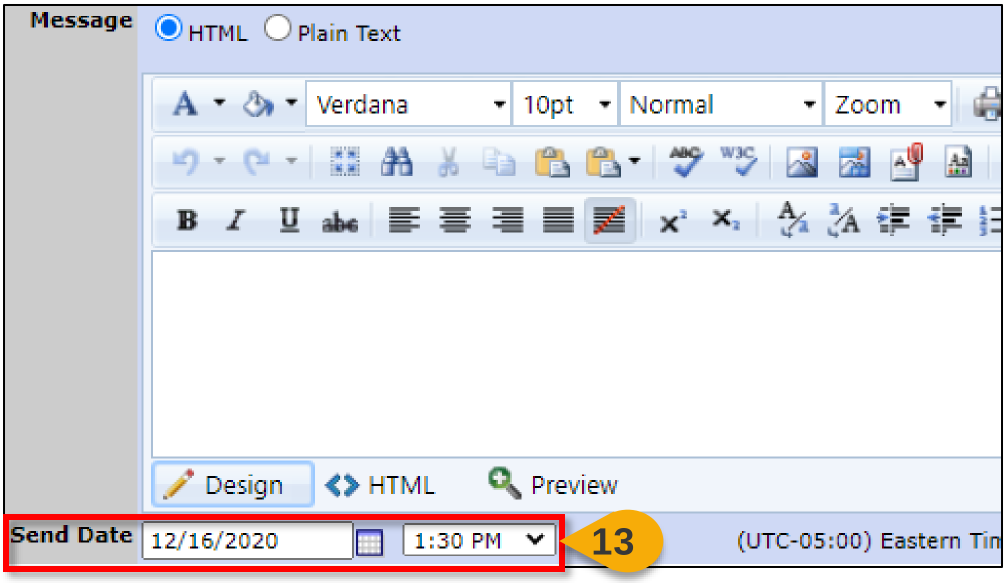


Step 12: Enter the body of the email into the **Message** field. This field is where you write in the body of your email. You can choose to send the email as Plain Text or in HTML.

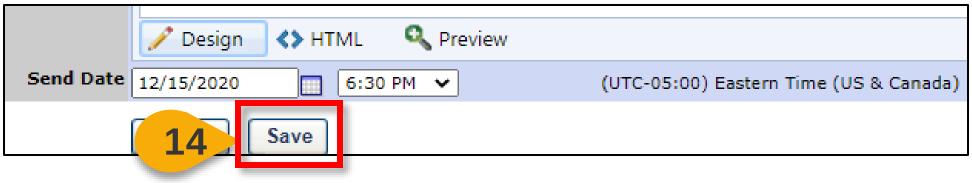


Send Emails from Roster (Cont.5)

Step 13: Select a **Send Date.** This is the date and time at which the email will send.



Step 14: Click **Save** to send the email.

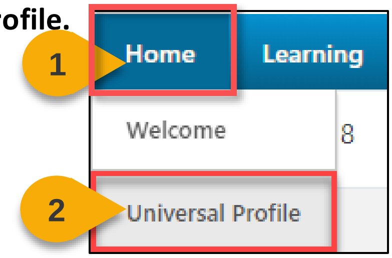


Checklists and Forms

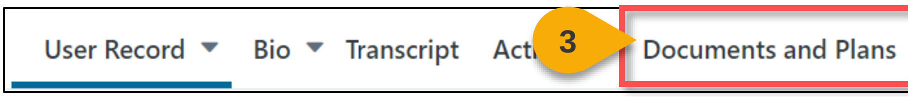
View Submitted Forms

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

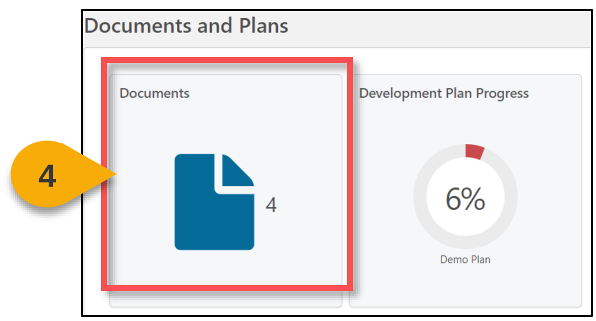
Steps 1 & 2: Hover over **Home** and click **Universal Profile.**



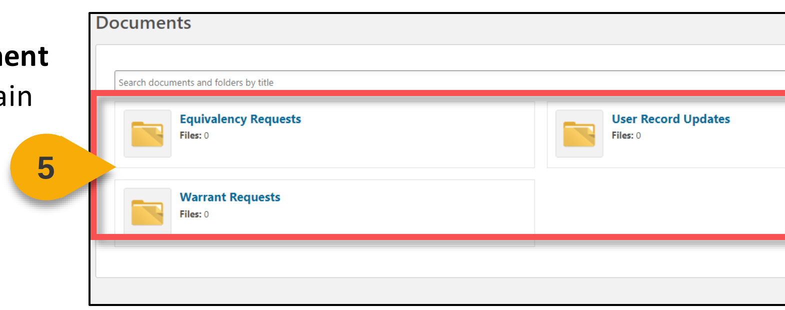
Step 3: Click on **Documents and Plans.**



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



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



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

Warrant Requests: Contains Warrant Forms you have submitted.

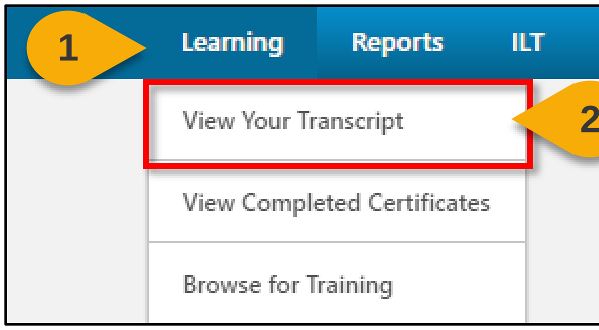
User Record Updates: Contains User Record Update Forms you have submitted.

Request Education/Experience Verification

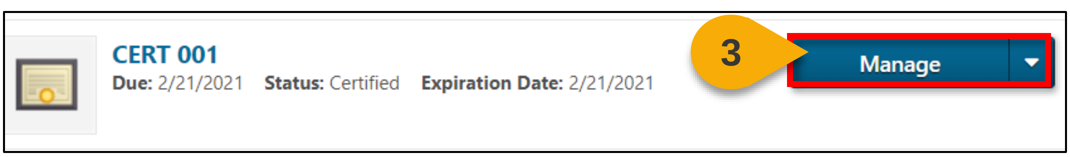
When you need to submit an Education or Experience Verification Checklist for a Certification…

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

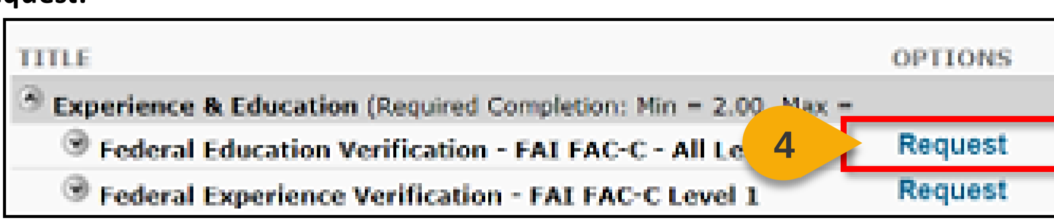
Steps 1 & 2: Hover over the Learning tab and click View Your Transcript.



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



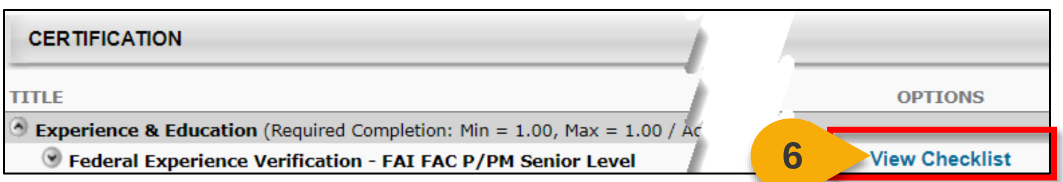
Step 4: Scroll down until you see Experience and/or Education Verification and click Request.



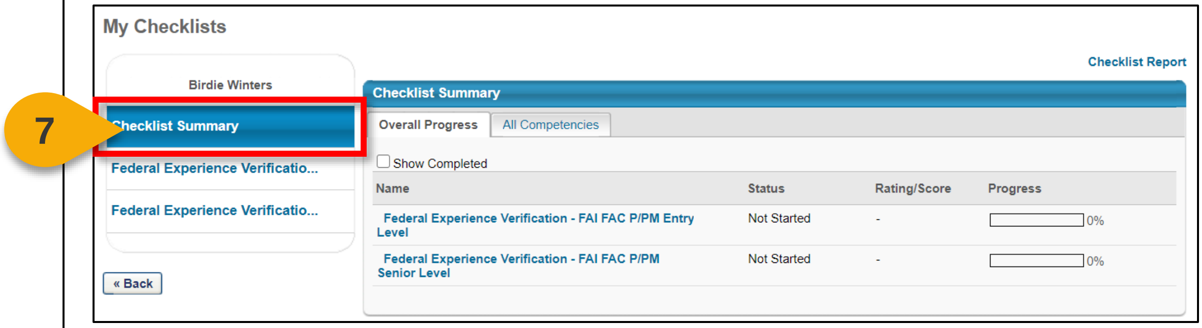
Request Education/Experience Verification (Cont.1)

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

Step 6: Click on View Checklist.

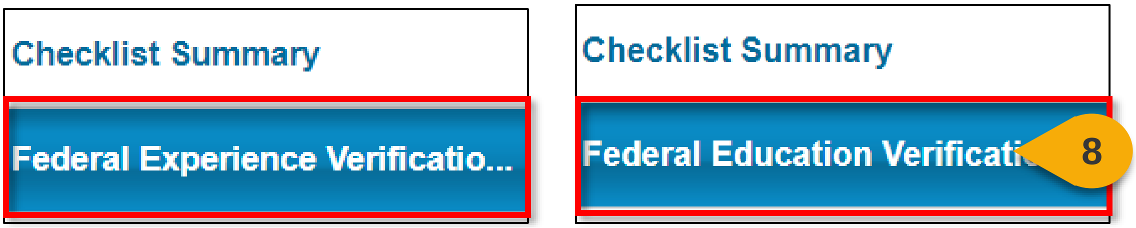


Step 7: Click on **Checklist Summary** to view the overall progress of any checklists associated with a certification.

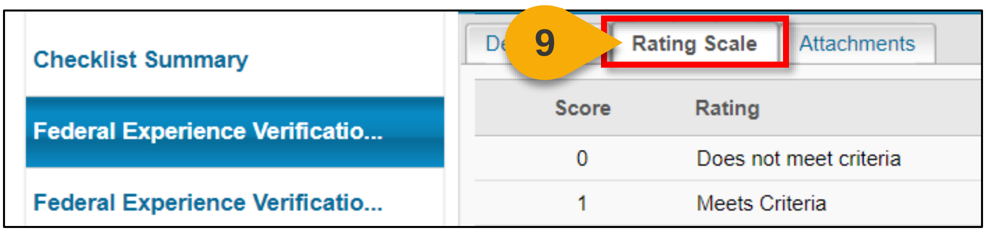


Request Education/Experience Verification (Cont.2)

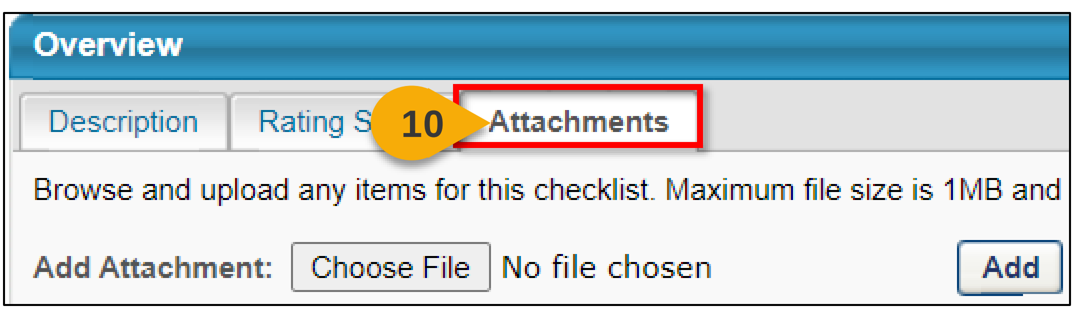
Step 8: Click on **Federal Education/ Experience Verification** to view instructions for the checklist.



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

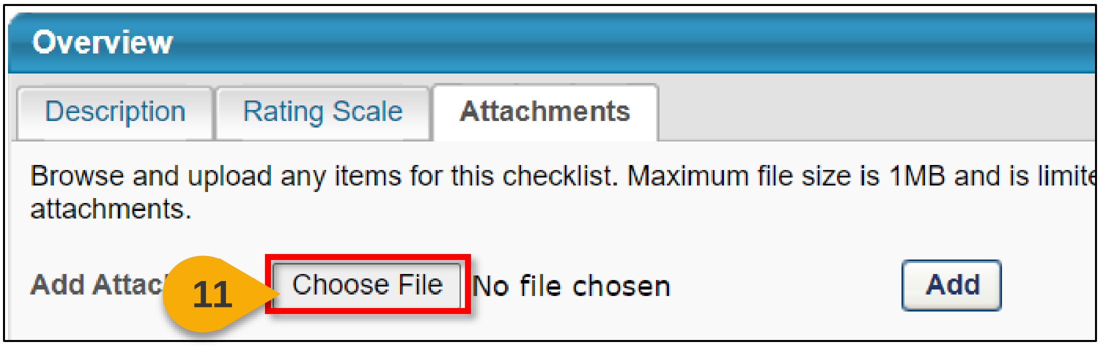


Step 10: Click on the **Attachments tab** to upload any necessary documents for the checklist verifier to review.

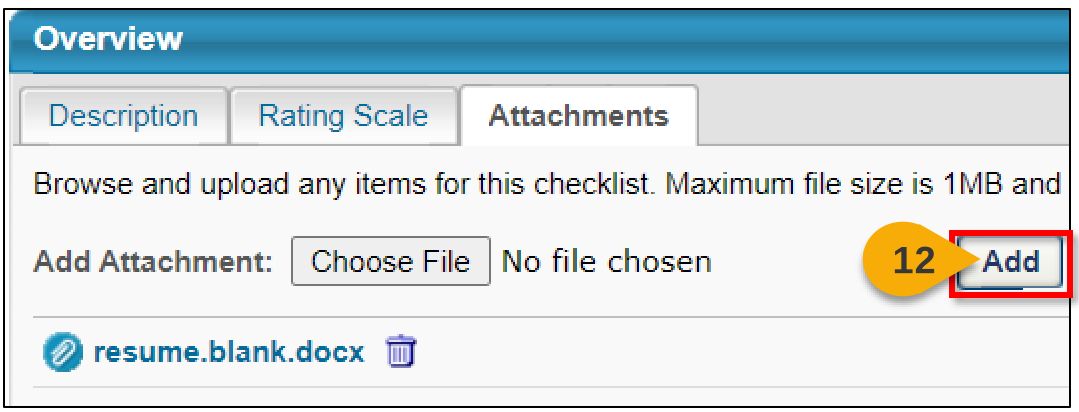


Request Education/Experience Verification (Cont.3)

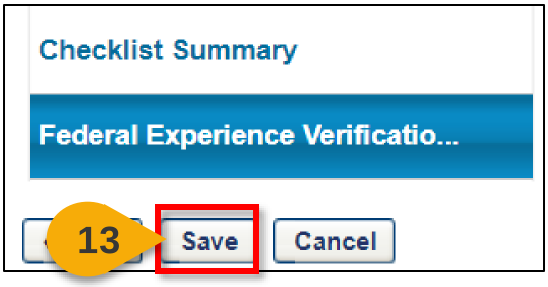
Step 11 : Click **Choose File** to add a copy of your resume or other relevant documents.



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



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

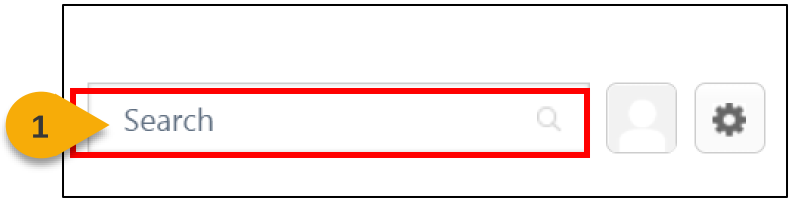


Submit an Equivalency/Fulfillment Form

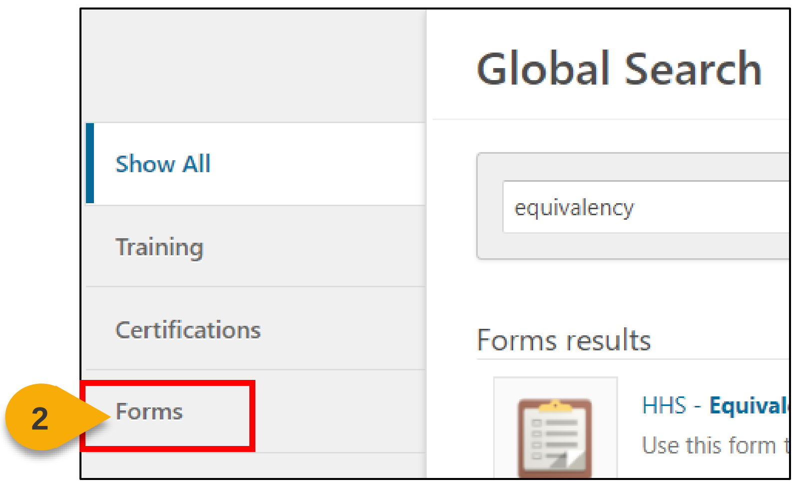
When you want to request Equivalency or Fulfilment for a Course…

Use Global Search to find the Equivalency/Fulfillment form.

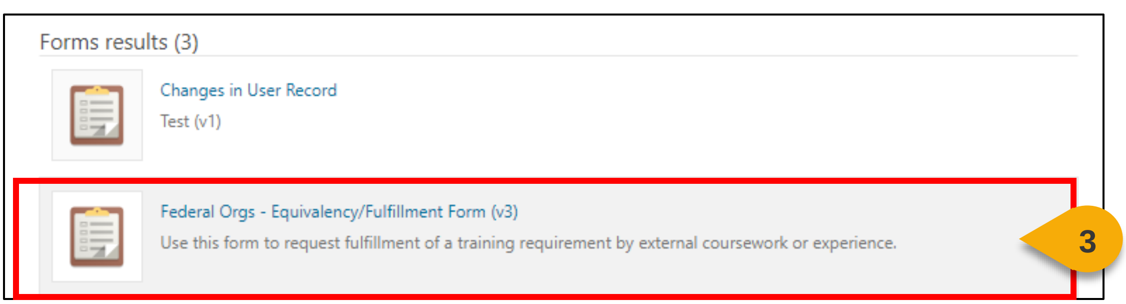
Step 1: Enter **Equivalency** in the Search box and click the Magnifying Glass.



Step 2: Click on **Forms.**

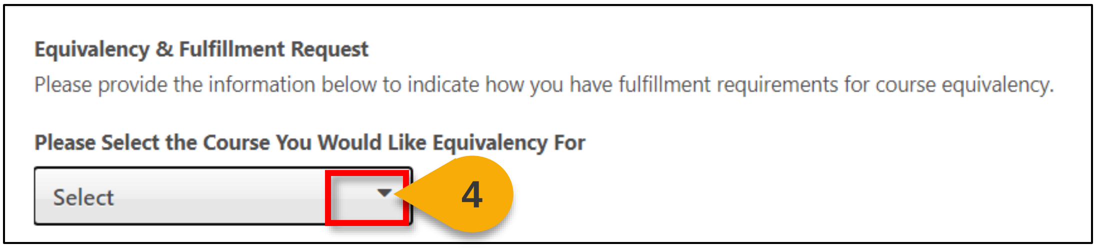


Step 3: Click on the **Equivalency/Fulfillment Form** for your agency.

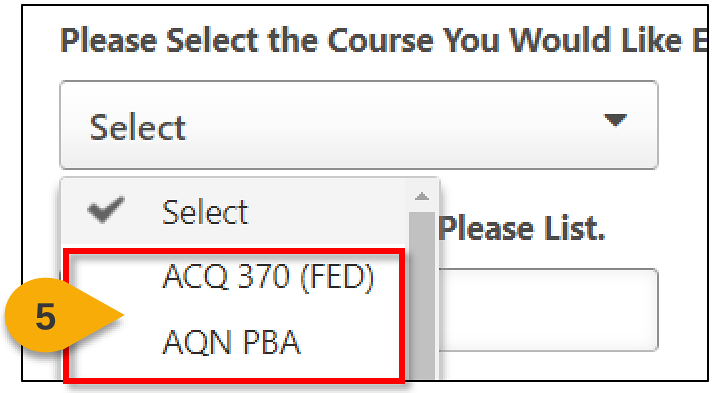


Submit an Equivalency/Fulfillment Form (Cont.1)

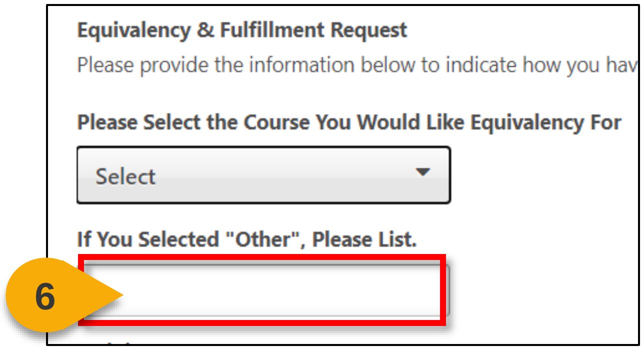
Step 4: Select the dropdown arrow to choose the course for which you would like an equivalency.



Step 5: Select the course from the dropdown menu.

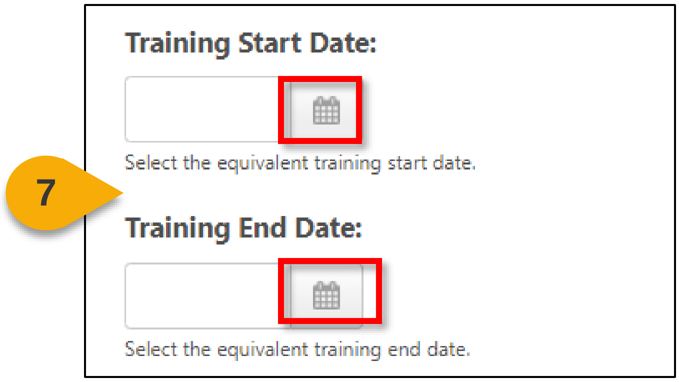


Step 6: If the course you are trying to request an equivalency for is not available, you can enter it in the Other textbox.

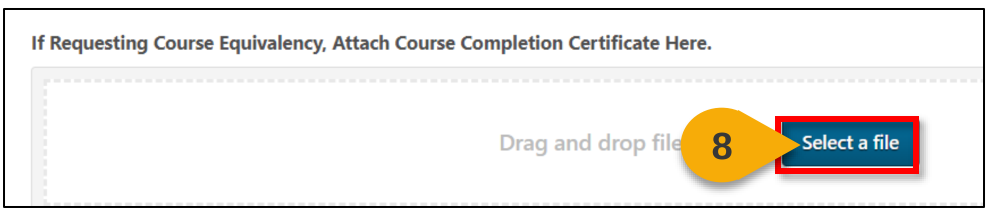


Submit an Equivalency/Fulfillment Form (Cont.2)

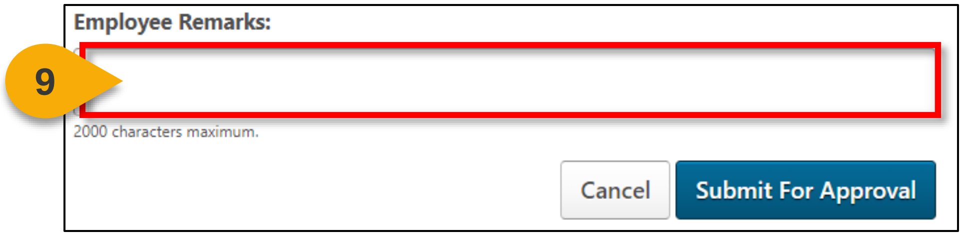
Step 7: Click the calendar icon to enter the Training Start and End dates.



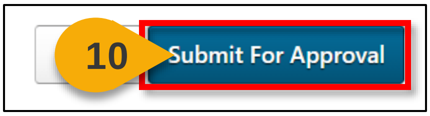
Step 8: Click Select File to add any supporting documentation.



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



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

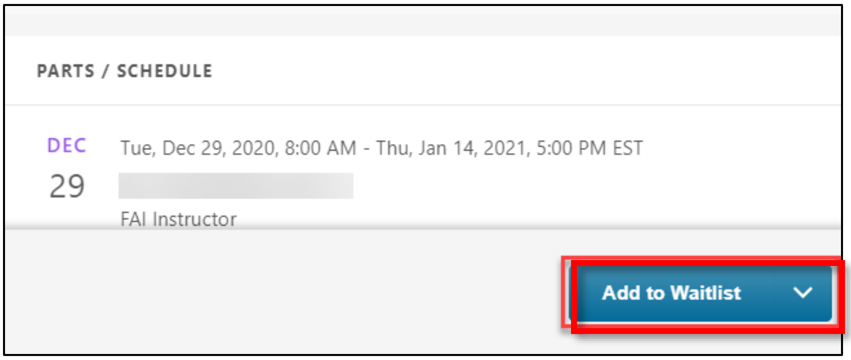


Submit an Exception Request

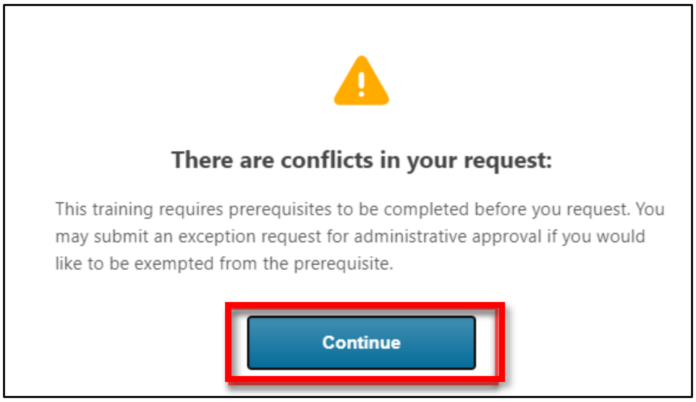
When you want to submit an Exception Request for a course prerequisite…

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.



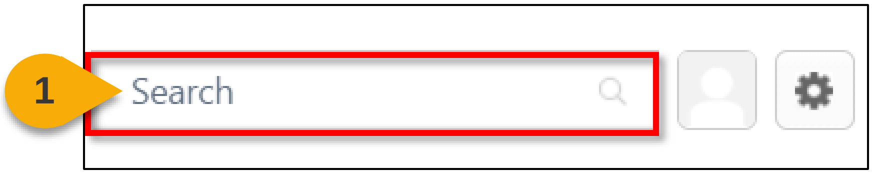
Step 3: The status for the session will change to **Exception Requested** on your transcript.

Certifications

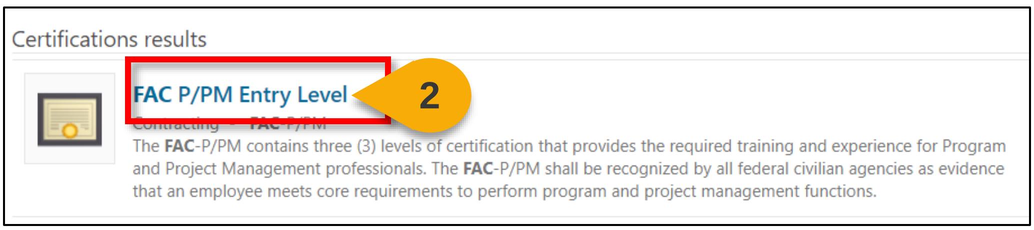
Request and Manage a Certification

When you want to request a Certification…

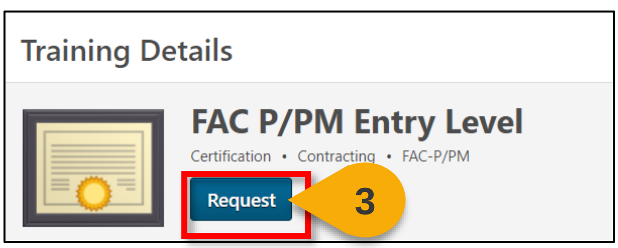
Step 1: In Global Search, type in the Certification you wish to request and click the Magnifying Glass.



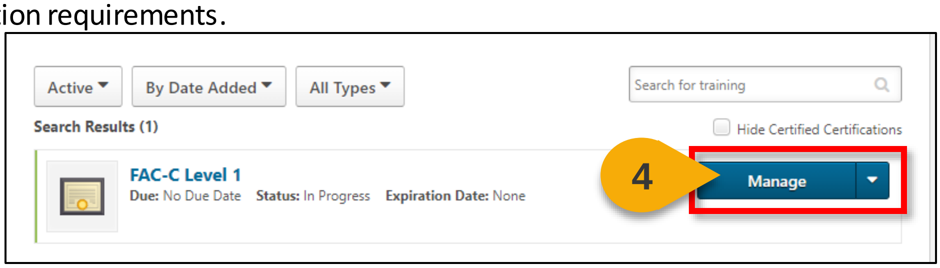
Step 2: Click on the **Certification** you'd like in the results.



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

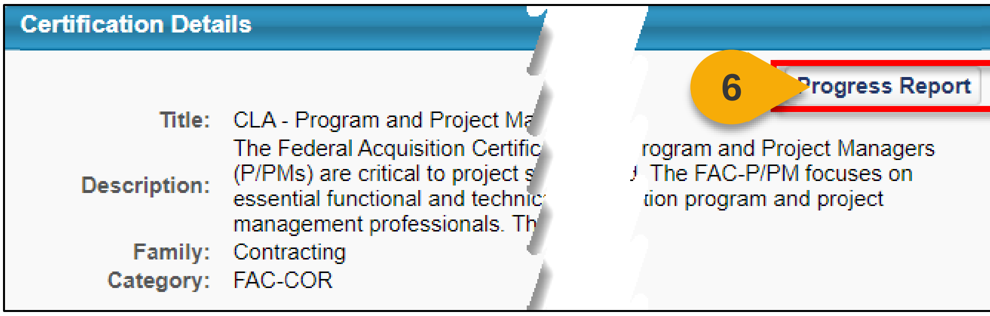


Step 4: You will be directed to your Transcript page. The Certification will be listed on the screen under Active courses with "In Progress" status. Click **Manage** to view the Certification requirements.

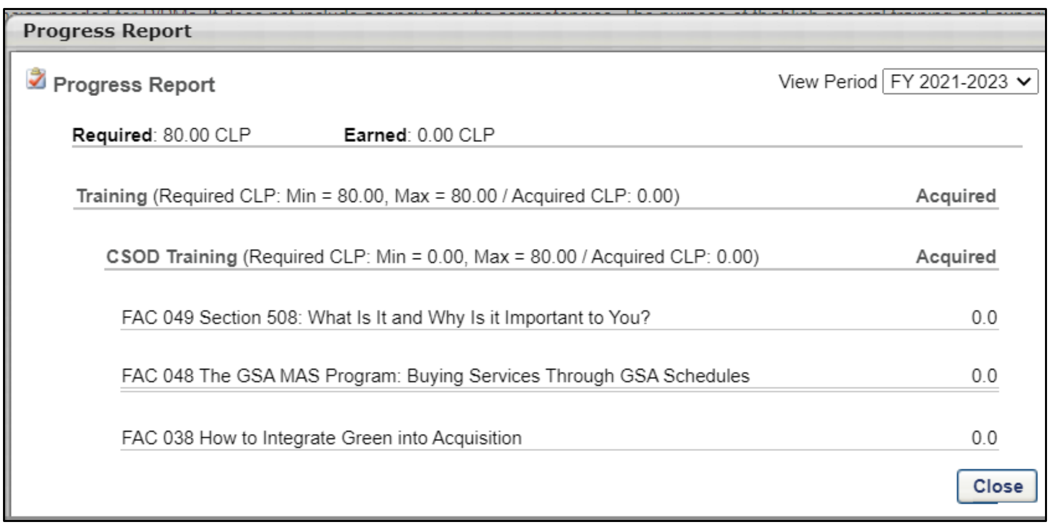


Request and Manage a Certification (Cont.1)

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



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



Individual Development Plans

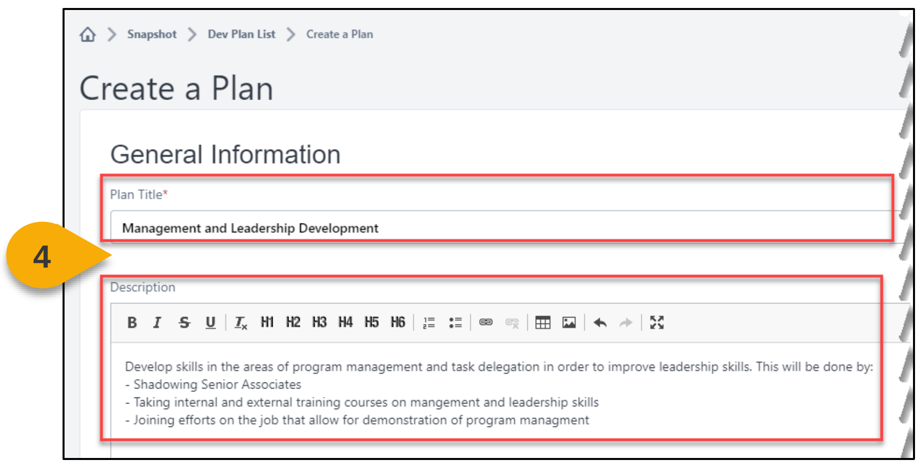
Create an IDP

When you want to create an IDP…

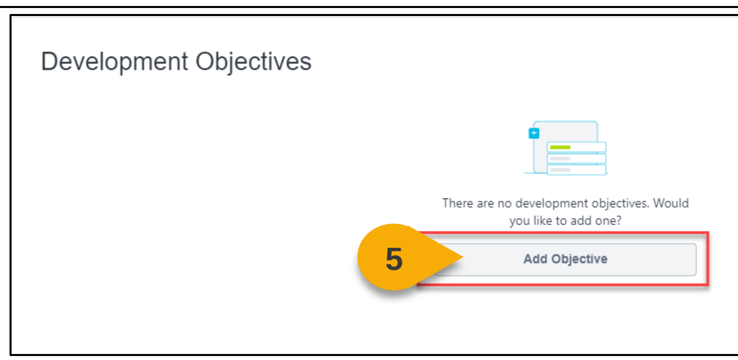
Steps 1 & 2: Hover over **Performance** and click on **Development Plans.**

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

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

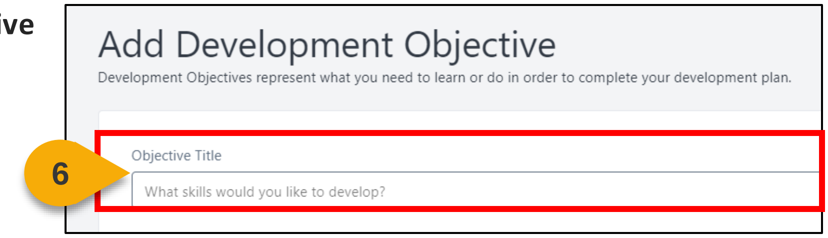


Step 5: Click on the **Add Objective button** in the Development Objectives section.



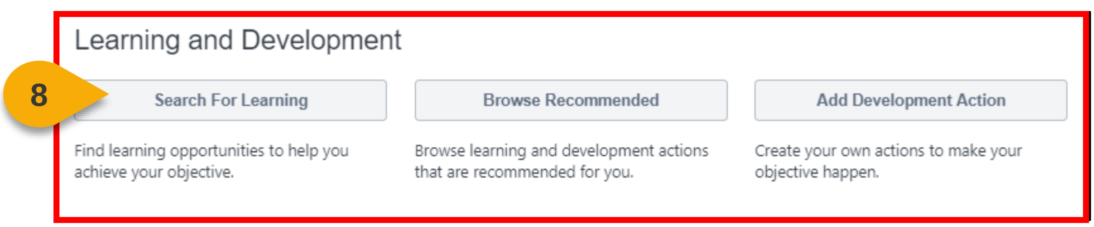
Create an IDP (Cont. 1)

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



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

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



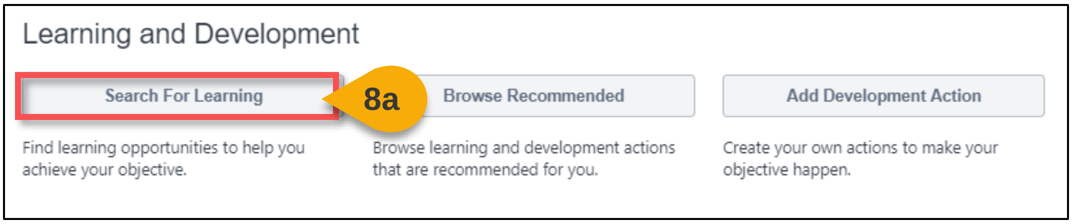
Search for Learning: Encompasses training sessions provided. It allows you to select online sessions.

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

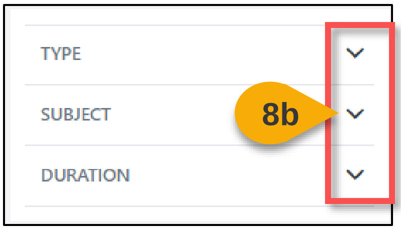
Add Development Action: Free text that allows you to add any external training or action item you wish to include in order to develop yourself professionally.

Create an IDP (Cont. 2)

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

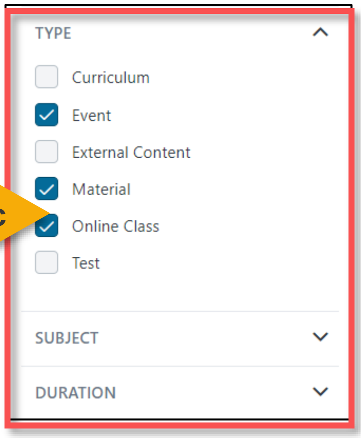


Step 8b: All the available courses will be displayed on the screen. To filter the results displayed, click on the **arrows next to the filter options** to the left of the page.



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

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

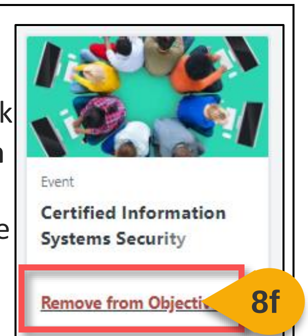


Create an IDP (Cont. 3)

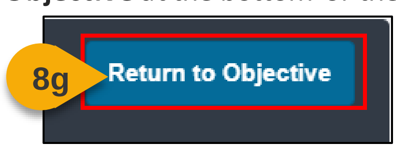
Step 8d: You may also search for a specific training course using the **Search bar**.

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

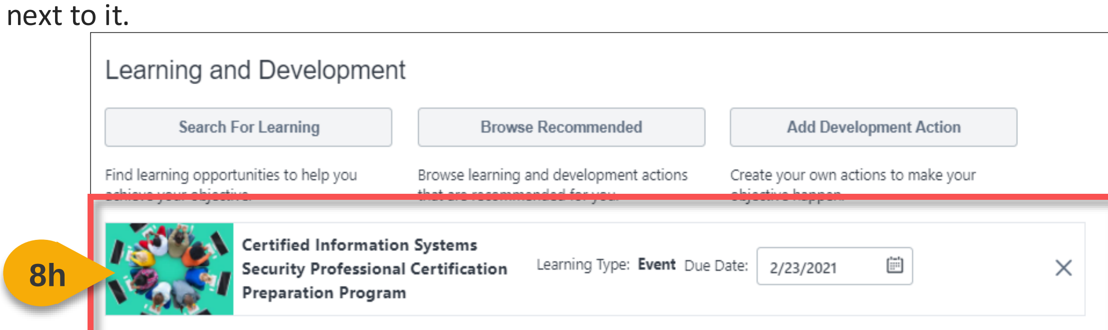
Step 8f: If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.



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

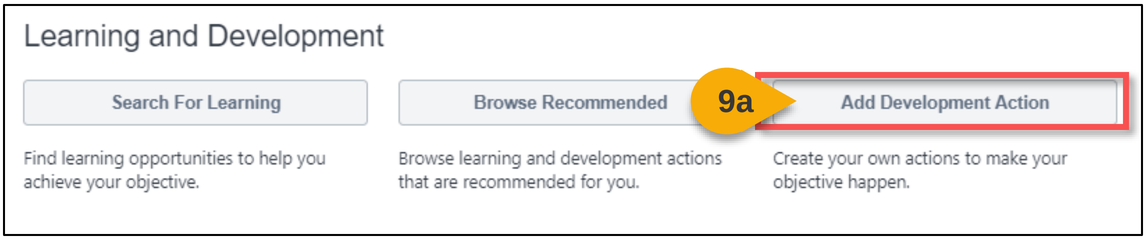


Step 8h: The course(s) selected will appear on the main **Objective** screen. By default, the training due date is set up to be due 6 months from now, but this date is editable. Notice that the training can be removed from your Objective by clicking on the **X icon** next to it.

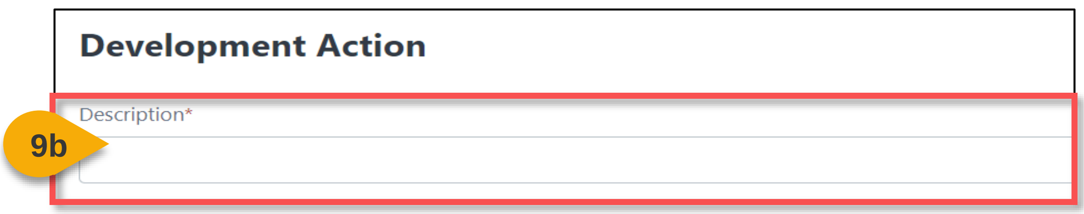


Create an IDP (Cont. 4)

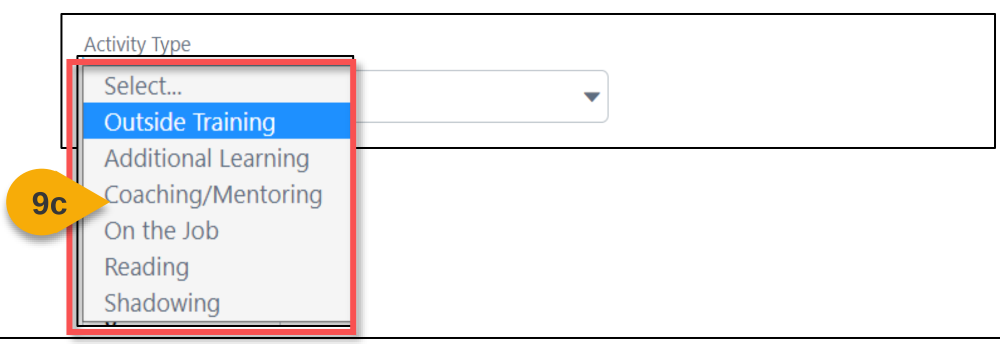
Step 9a: To add action items not in the CSOD catalog to your IDP Objective, click on **Add Development Action**.



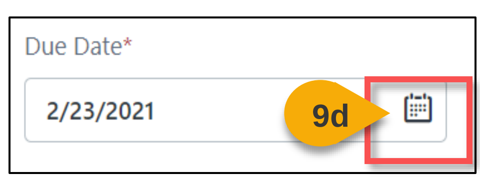
Step 9b: A pop-up window will appear on the screen. You must add at description to your development action in the **Description** field.



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

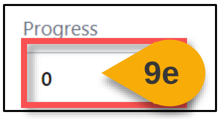


Step 9d: Confirm the due date for the development item. By default, the due date is set up to be due 6 months from when you first create this item. To change the due date, click on the **calendar icon** in the Due Date field, or simply type in the date.

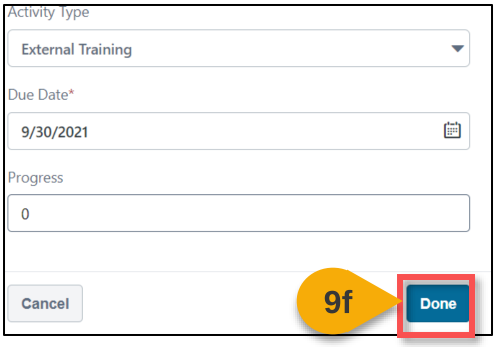


Create an IDP (Cont. 5)

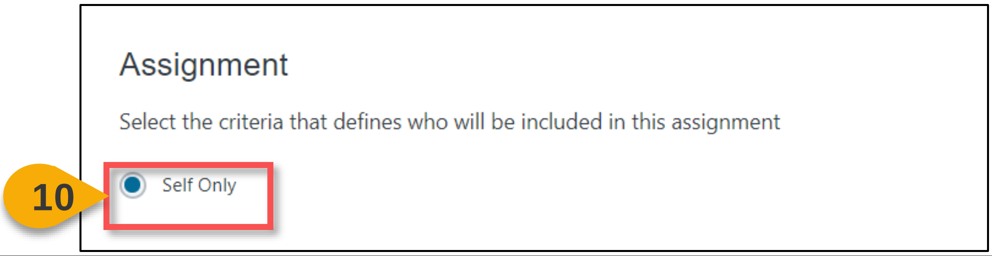
Step 9e: Update the **Progress** you have made as applicable. This is a percentage, but you don't need to type "%", just the number, e.g., for 25%, type in "25".



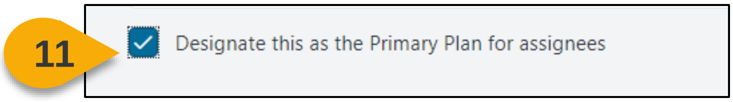
Step 9f: Click **Done** to add the activity to your IDP.



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

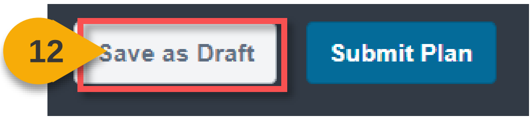


Step 11: To assign this IDP as your primary IDP (you can have multiple IDPs), check the box next to **Designate this as the Primary Plan for assignees**.

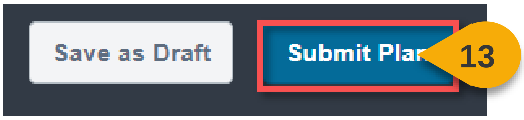


Create an IDP (Cont. 6)

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



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



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

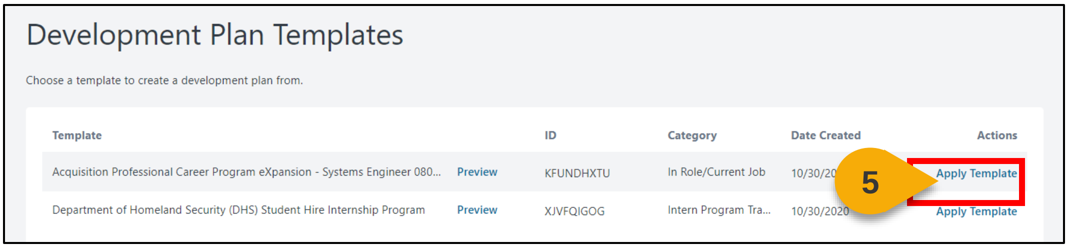
Create an IDP from a Template

When you want to create an IDP using a template…

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

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

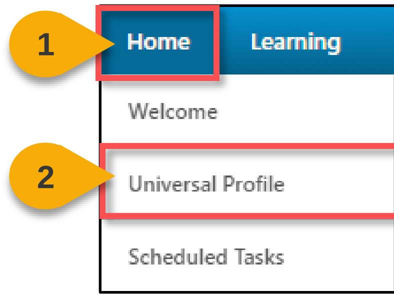
Step 5: Select the template you want to use and click **Apply Template.** You can edit the template or submit it for approval as-is.



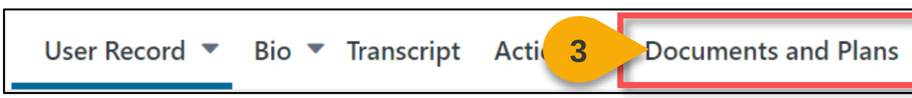
Update IDP

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

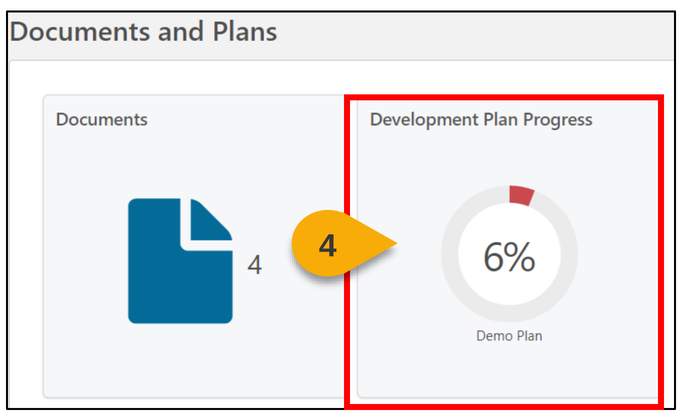
Steps 1 & 2: Hover over **Home** then navigate to **Universal Profile**.



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



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

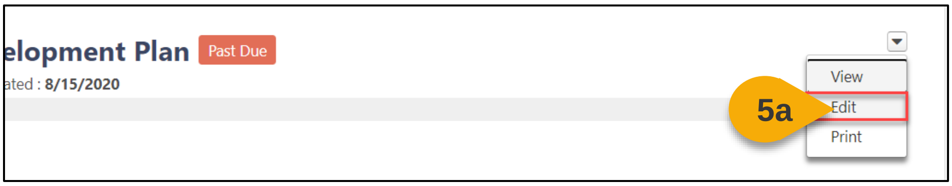


Note: You can also navigate to the IDP using the Performance tab and then clicking on Development Plans.

Update IDP (Cont. 1)

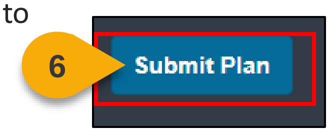
If you wish to add a new Objective to your IDP, follow steps 5a – 5b below.

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



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

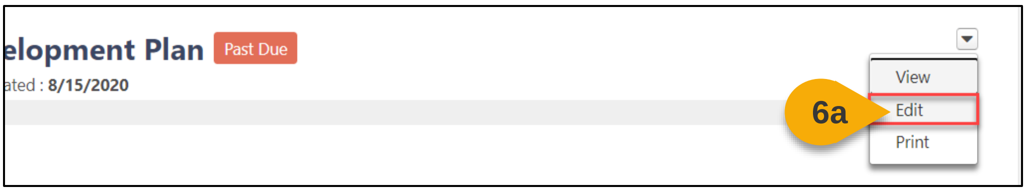
Step 6: Click on the **Submit Plan** button when you are ready to resubmit your plan for approval.



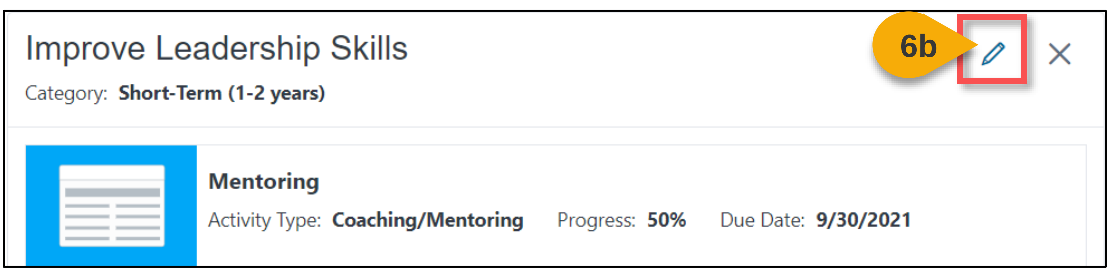
Update IDP (Cont. 2)

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

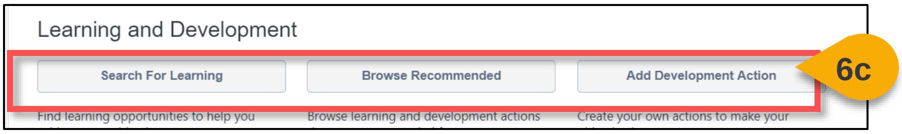
Step 6a: Select the dropdown icon **Edit** option next to the plan with the Objective you want to update.



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

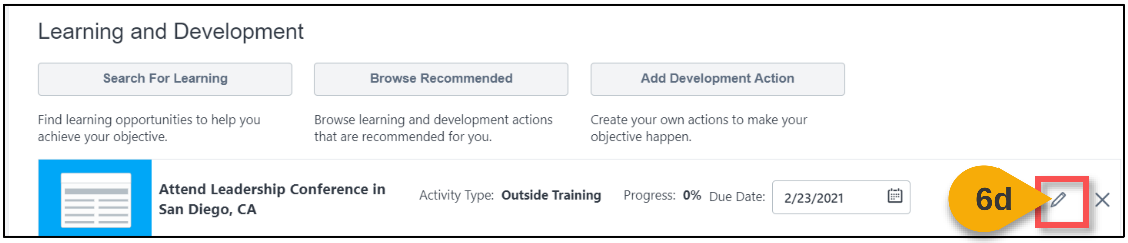


Step 6c: To add training or Development Actions, choose from the options within **Learning and Development.**

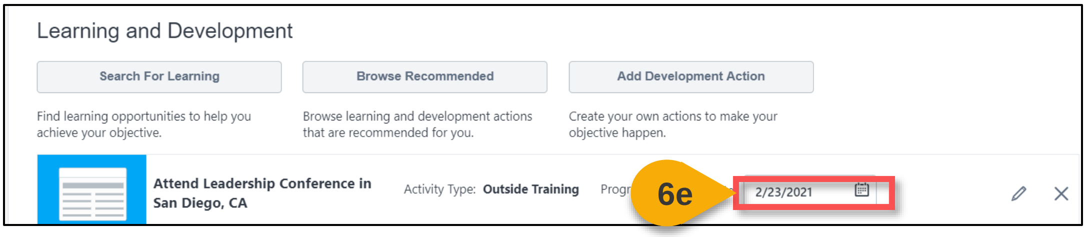


Update IDP (Cont. 3)

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

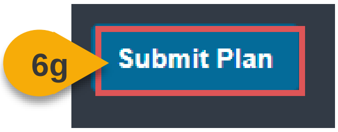


Step 6e: For training courses that are NOT Development Actions, you may update the due date by clicking on the **Due Date field** or delete it by clicking on the **X icon** next to it. Training course completions will be updated automatically as you complete these training courses on your transcript.



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

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

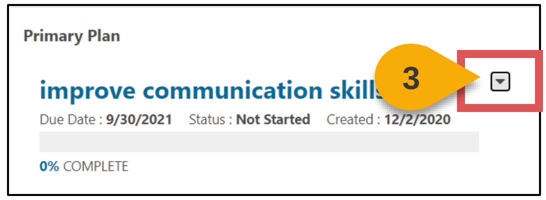


Cancel IDP

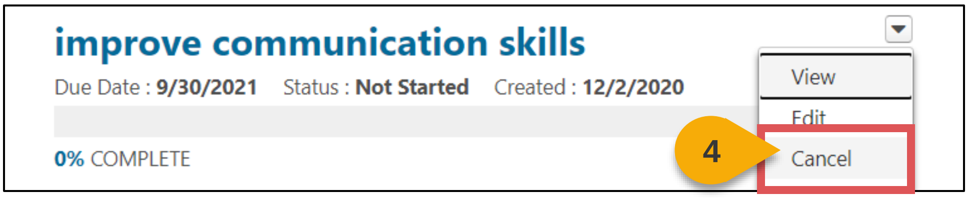
When you want to cancel an IDP…

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

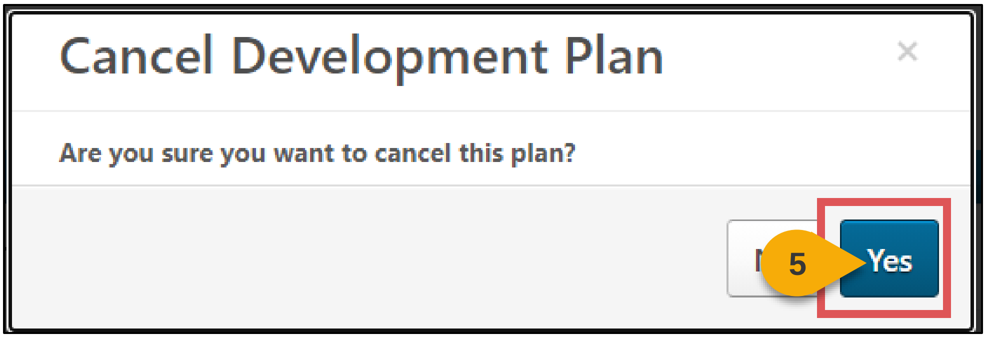
Step 3: Click the **dropdown arrow** next to the plan you would like to cancel.



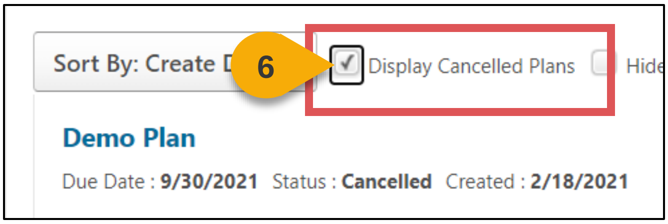
Step 4: Select **Cancel** from the dropdown menu.



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



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

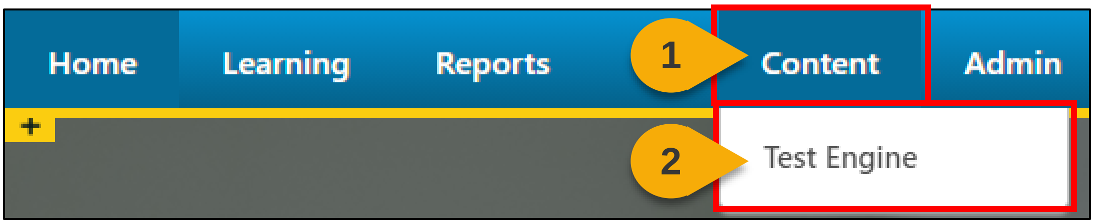


Test Engine

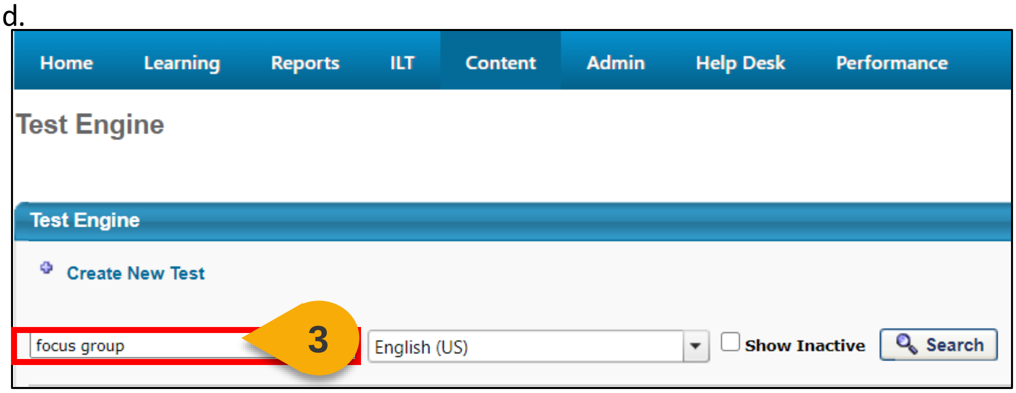
View User’s Exam Results

When you want to view exam results…

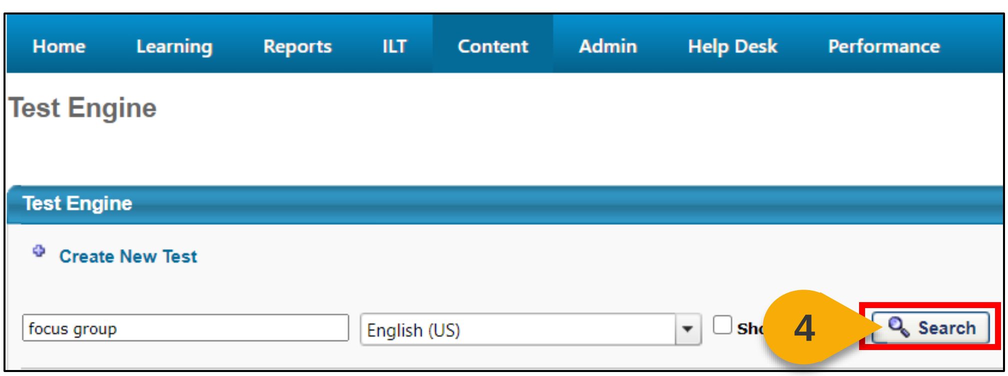
Steps 1 & 2: Navigate to the **Content tab** and click on **Test Engine**.



Step 3: Type in the **name of the test** that you want to view results for in the Search field.

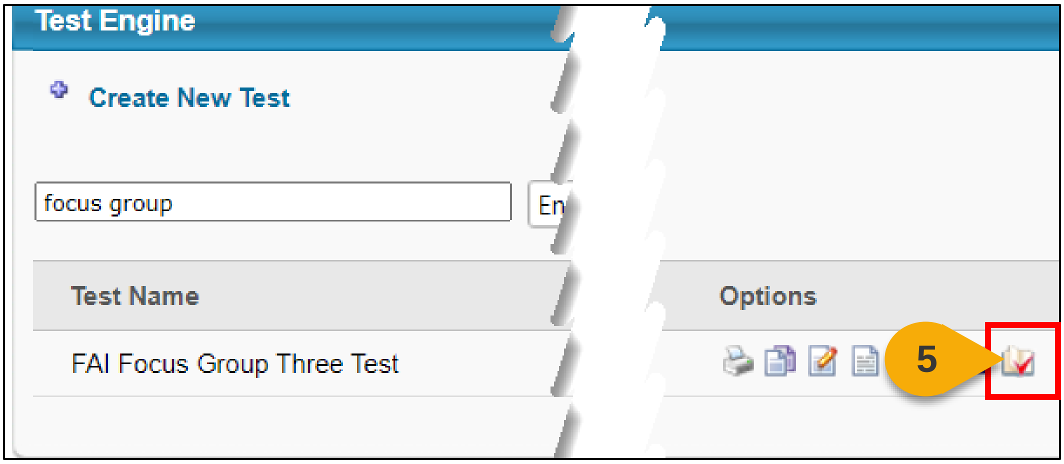


Step 4: Click the **Search button** or hit enter.

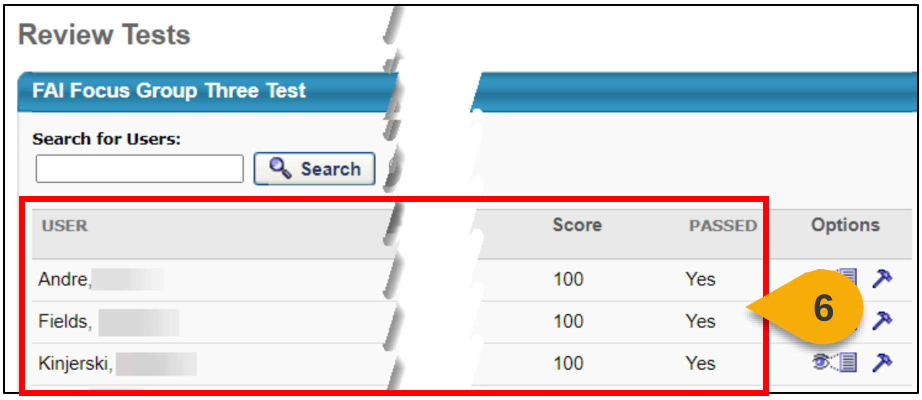


View User’s Exam Results (Cont.1)

Step 5: Click on the **Checkmark icon** to review the test results.



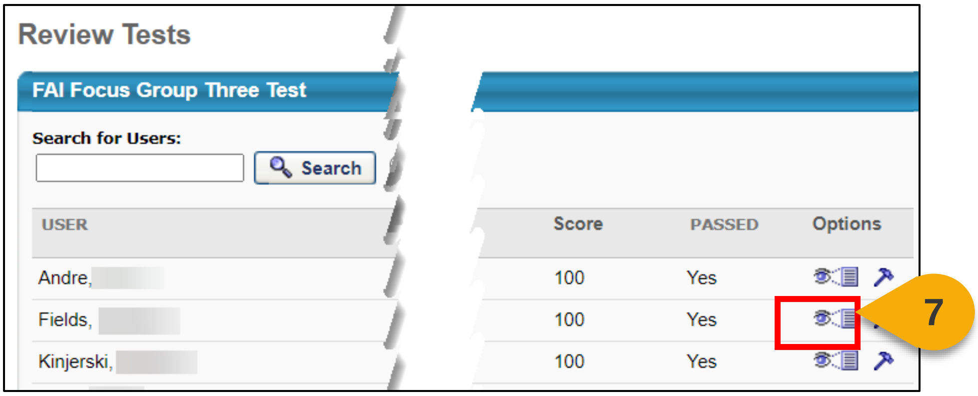
Step 6: You will be taken to the Review Tests page. Here you can view Users’ **Score** and **Passed** status.



- **Score** - This column displays the user's score on the test.
- **Passed** - This column indicates whether the user passed the test.

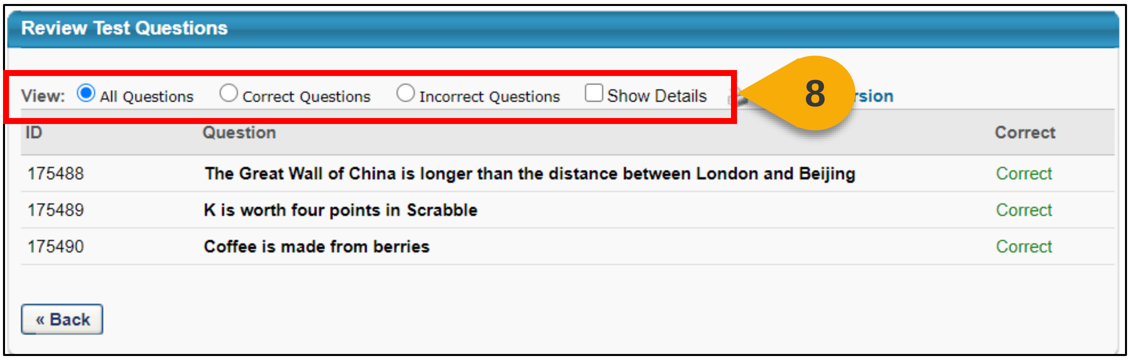
View User’s Exam Results (Cont.2)

Step 7: Click on the **Eye** Icon to view details on a specific User’s test results.



Step 8: On the Review Test Questions page, you will be able to see details for the User’s test. You can change the view to display.

- **All Questions:** Shows all questions; default view
- **Correct Questions:** Shows only questions answered correctly
- **Incorrect questions:** Shows only questions answered incorrectly
- **Show Details:** Shows the answer choices and what the user chose; if an answer explanation was included, it will also display.

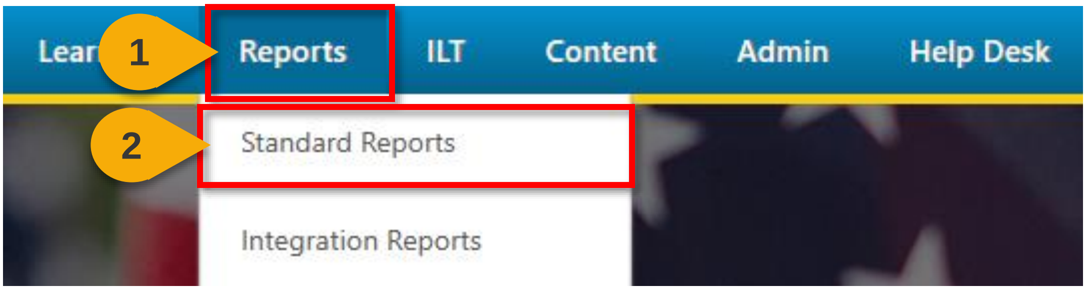


Reports

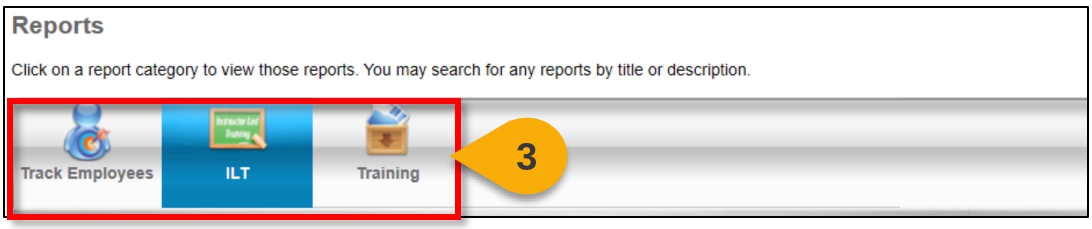
View Standard Reports

When you want to view Standard Reports…

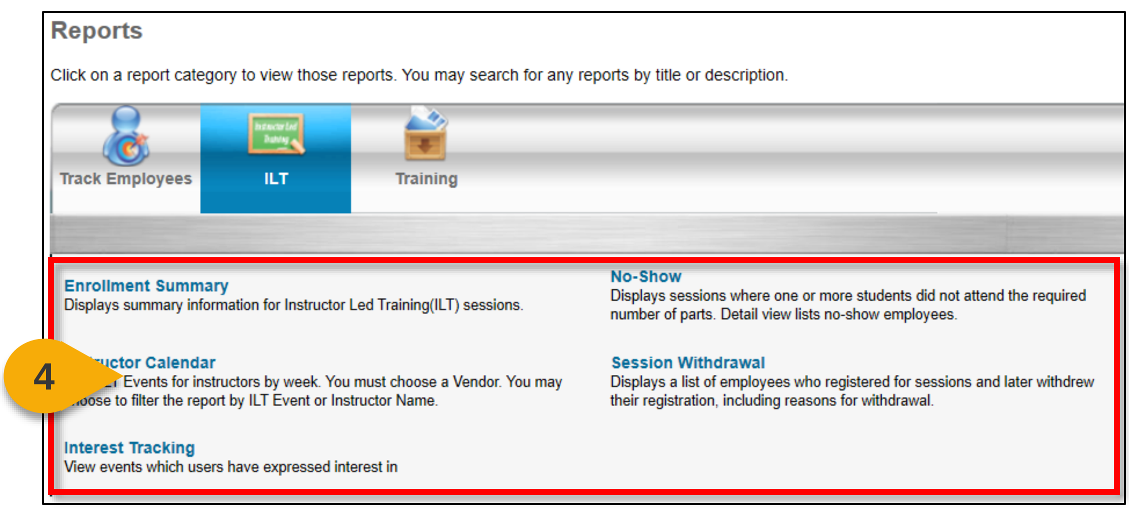
Steps 1 & 2: Hover over the **Reports tab** and then click **Standard Reports**.



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

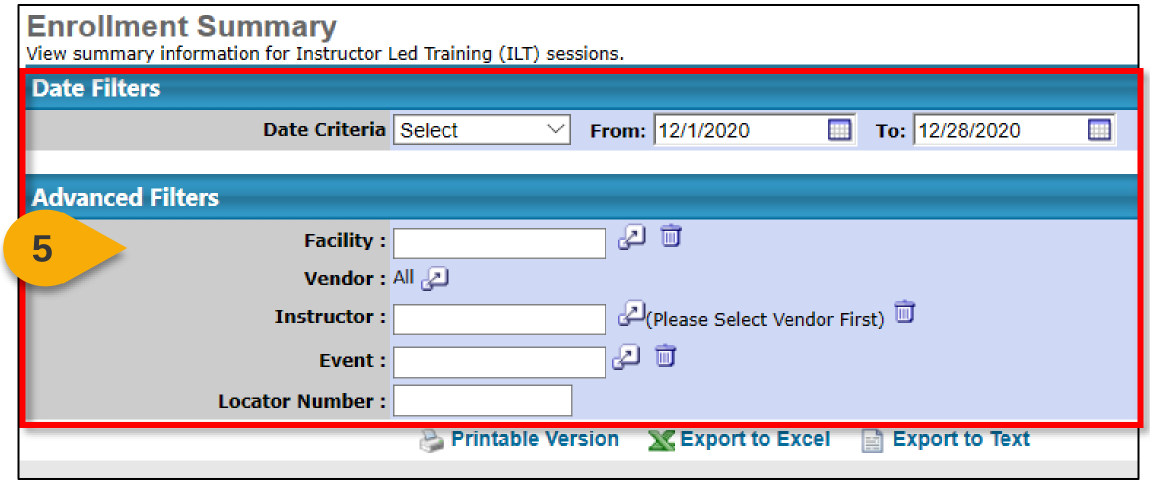


Step 4: Select the type of report you would like to view by clicking on the **name of the report**.

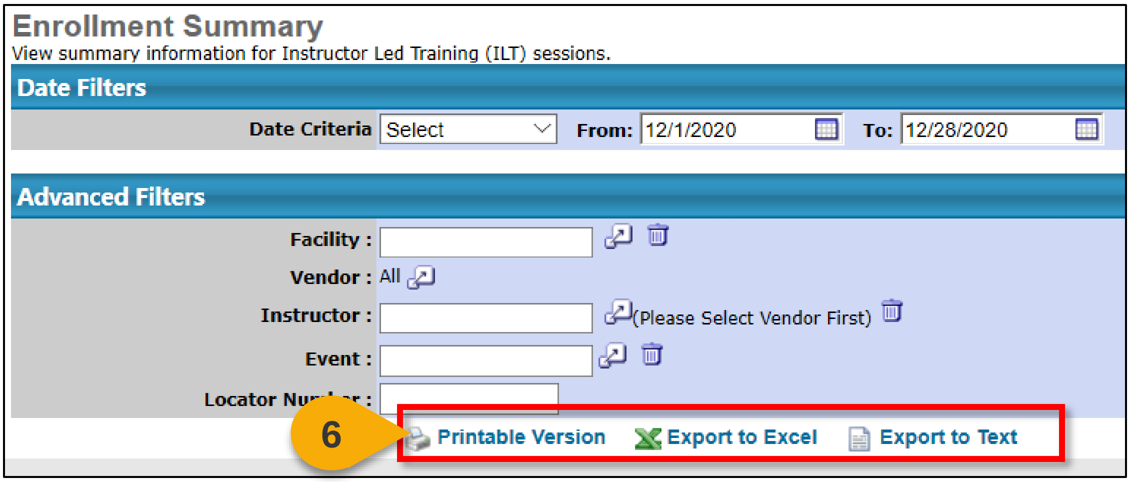


View Standard Reports (Cont.1)

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



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

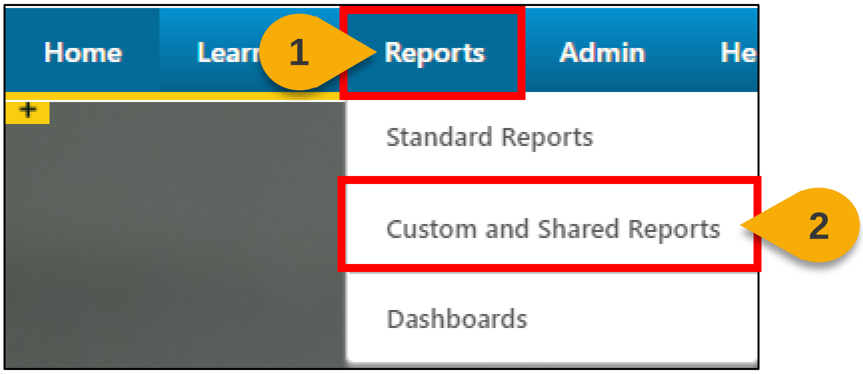


Note: Click "Yes" to open the Excel option after the download has completed.

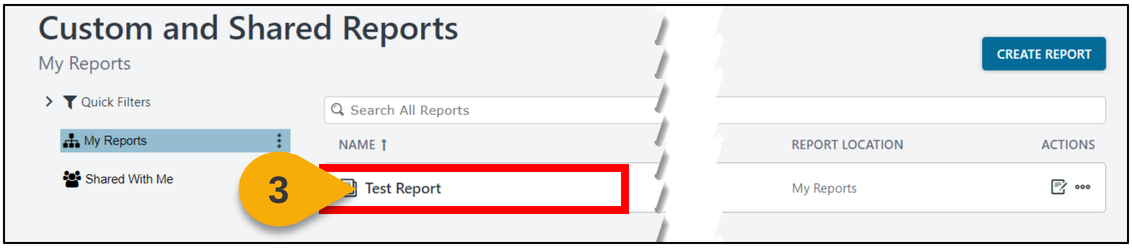
View Custom Reports

When you want view custom or shared reports…

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

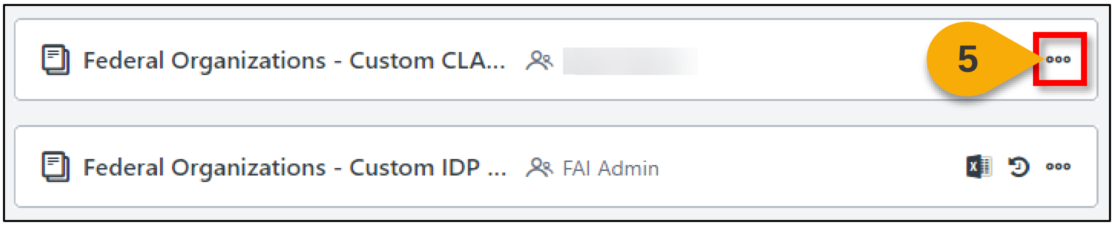


Step 3: You will arrive at the Custom and Shared Reports page. Here you will see all custom reports that you have created. Click on the **title** of the report to view it.

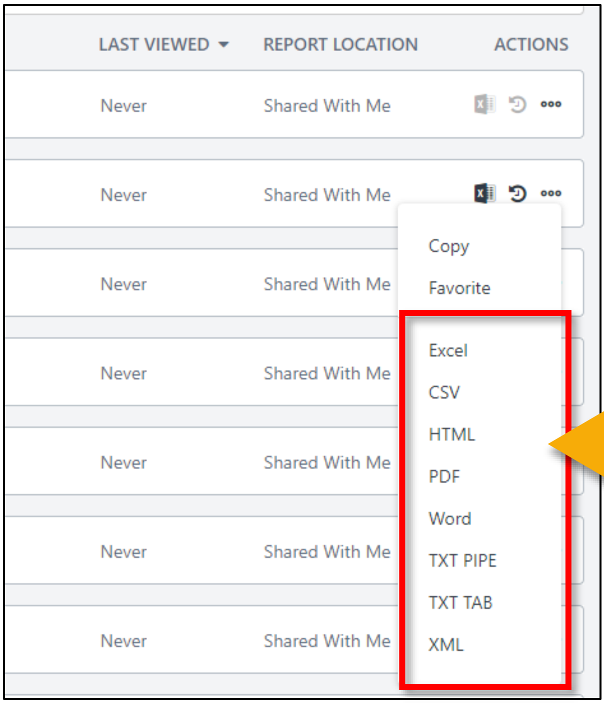


View Custom Reports (Cont.1)

Step 5: To see other report format options, click the **ellipses** (...) icon.



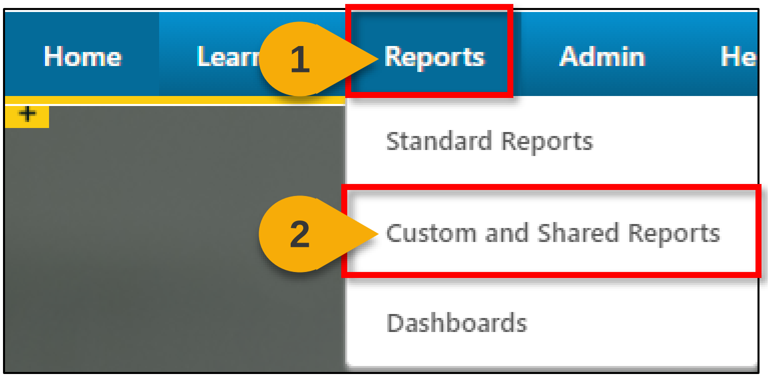
Step 6: Click the **file format** you wish to download. It will download to your computer.



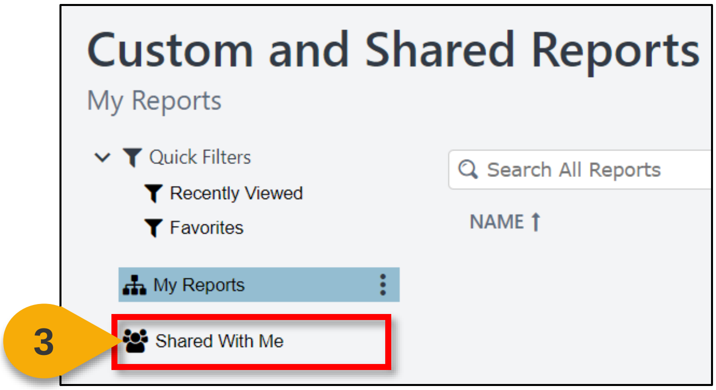
Filter and Download Custom Reports

When you want to filter and download a report…

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



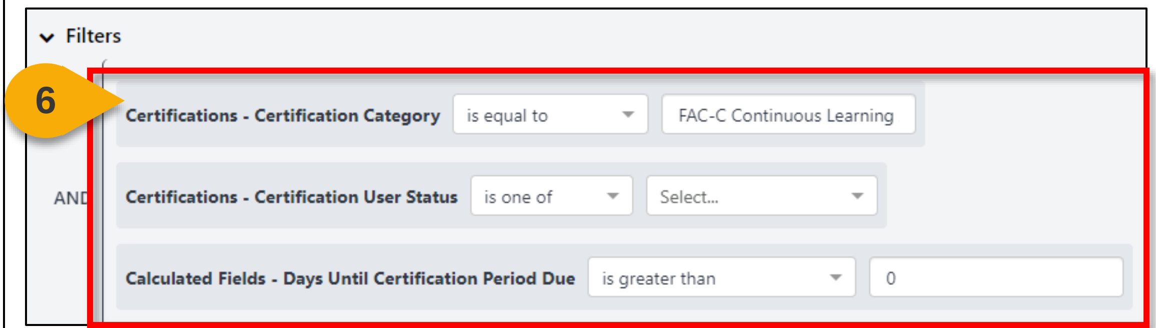
Step 3: On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you.



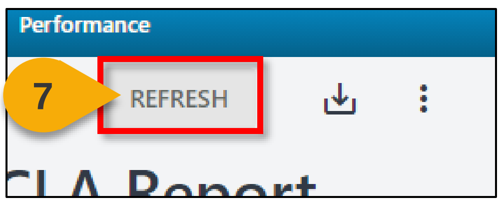
Step 4: Click the **Report Name** you want to view to update the report filters.

Filter and Download Custom Reports (Cont. 1)

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



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



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

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