



# Instructor Task Aid

## Task Aid Titles

- Log On
- Forgot Password
- Request an Account Using a SAAR Form
- View User Record
- Edit User Record
- Edit User Record via Advanced Form
- View Transcript
- View Transcript Status
- Use Global Search
- Request External Training Credit Within a Certification
- Request External Training Credit from Transcript
- Add External Training from the Transcript 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
- View Roster
- Manage Roster
- Update Roster via Upload
- Add Walk-Ins to Roster or Users to Waitlist
- Upload Attendance
- Manually Complete Attendance
- Move Users Between Sessions
- Send Emails from Roster
- View Submitted Forms
- Submit an Equivalency/Fulfillment Form
- Request Education/Experience Verification
- View Submitted Forms
- Submit an Equivalency/Fulfillment Form
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- Request and Manage a Certification
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- Create an IDP from a Template
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- Cancel IDP
- View User's Exam Results
- View Standard Reports
- View Custom and Shared Reports
- Filter and Download Reports

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



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



FAI@mail.mil

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# User Account Management



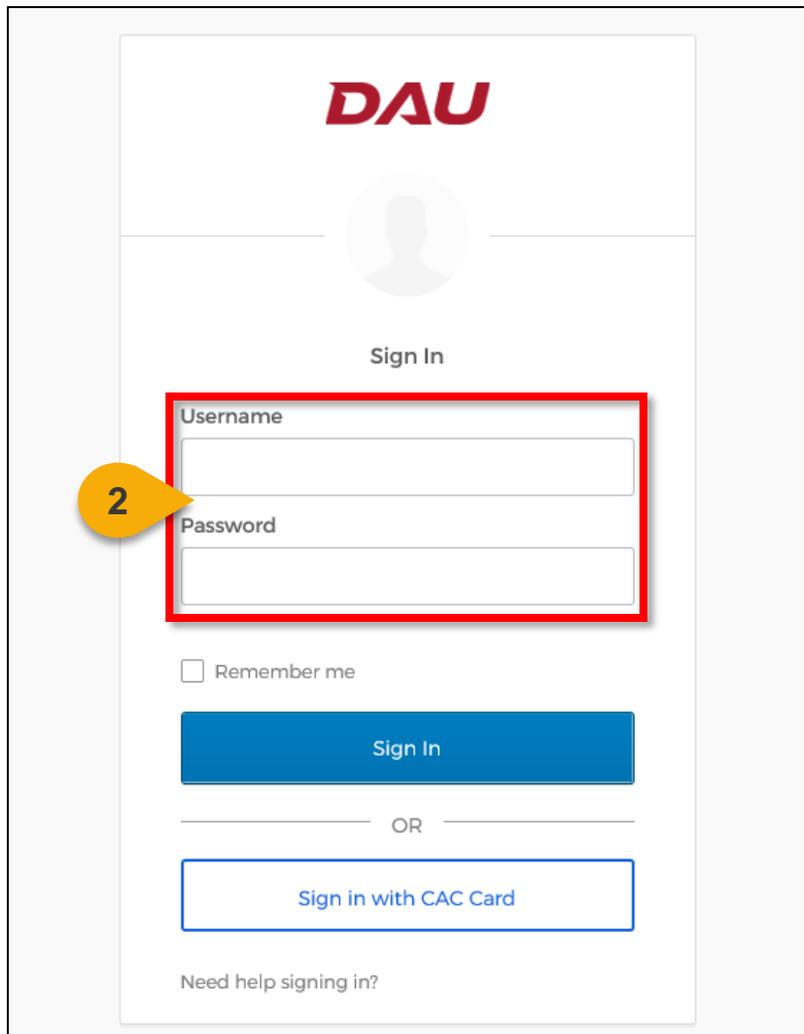
# Log On

*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.

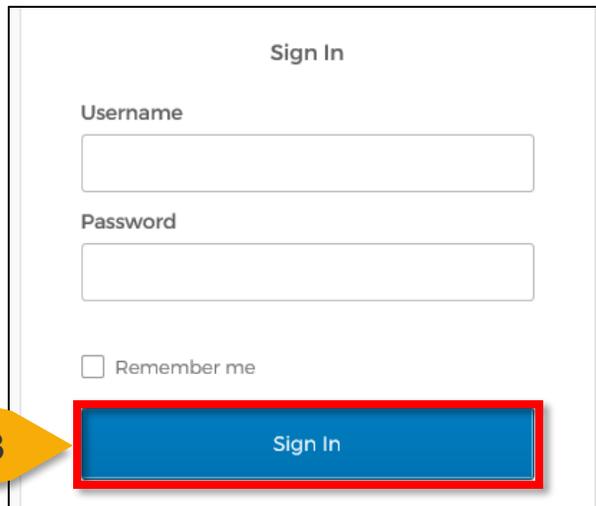


**Step 2:** The log on window will pop up. Enter your **Username** (your email) and **Password** in their respective fields.

A screenshot of the DAU Sign In page. At the top is the DAU logo in red. Below it is a grey silhouette of a person's head and shoulders. Underneath is the text 'Sign In'. There are two input fields: 'Username' and 'Password'. A yellow callout bubble with the number '2' points to the Username field. Below the input fields is a checkbox labeled 'Remember me'. Below that is a blue button labeled 'Sign In'. Below the button is the text 'OR'. Below that is a blue button labeled 'Sign in with CAC Card'. At the bottom is a link that says 'Need help signing in?'.

# Log On (Cont.1)

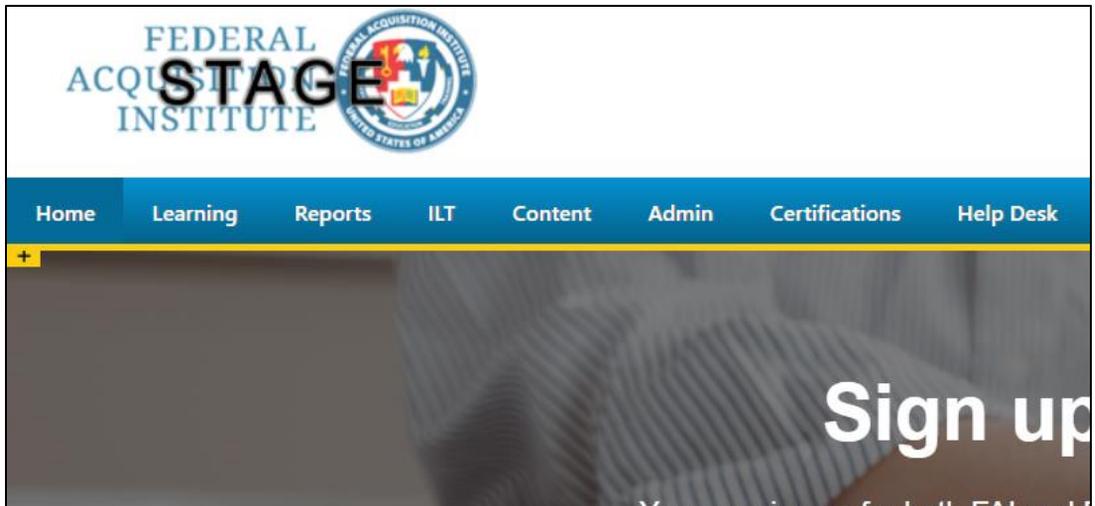
**Step 3:** Click **Sign In**.



The screenshot shows a 'Sign In' form with the following elements:

- Sign In** (title)
- Username** (label) with an input field below it.
- Password** (label) with an input field below it.
- Remember me
- Sign In** (button) highlighted with a red border and a yellow callout bubble containing the number '3'.

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



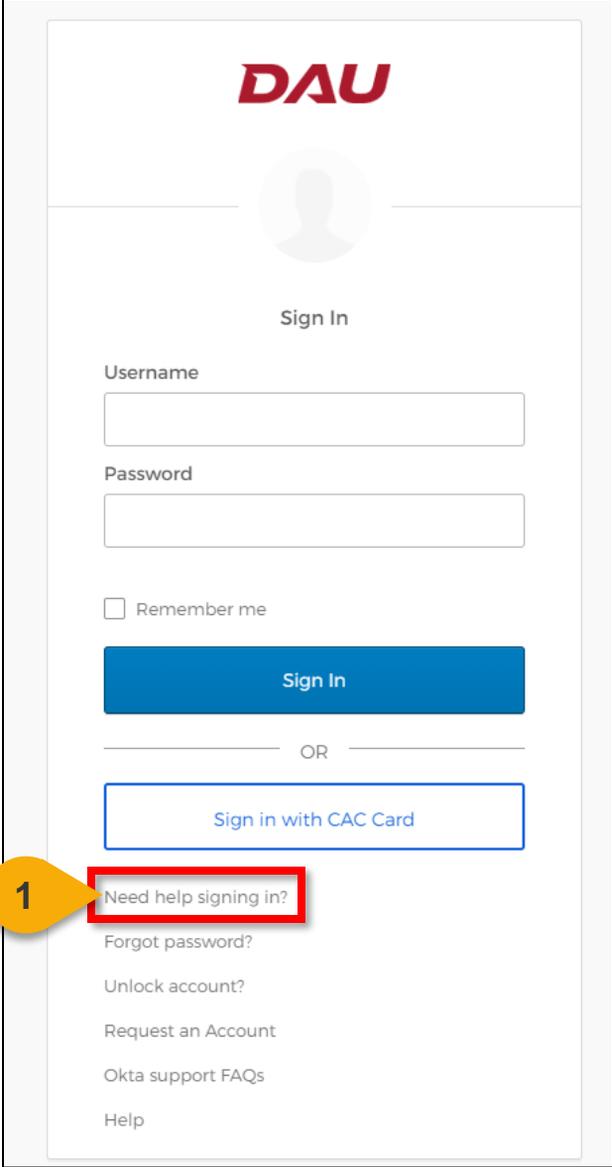
**NOTE:** If you receive an error message:

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

# Forgot Password

*When you can't log on...*

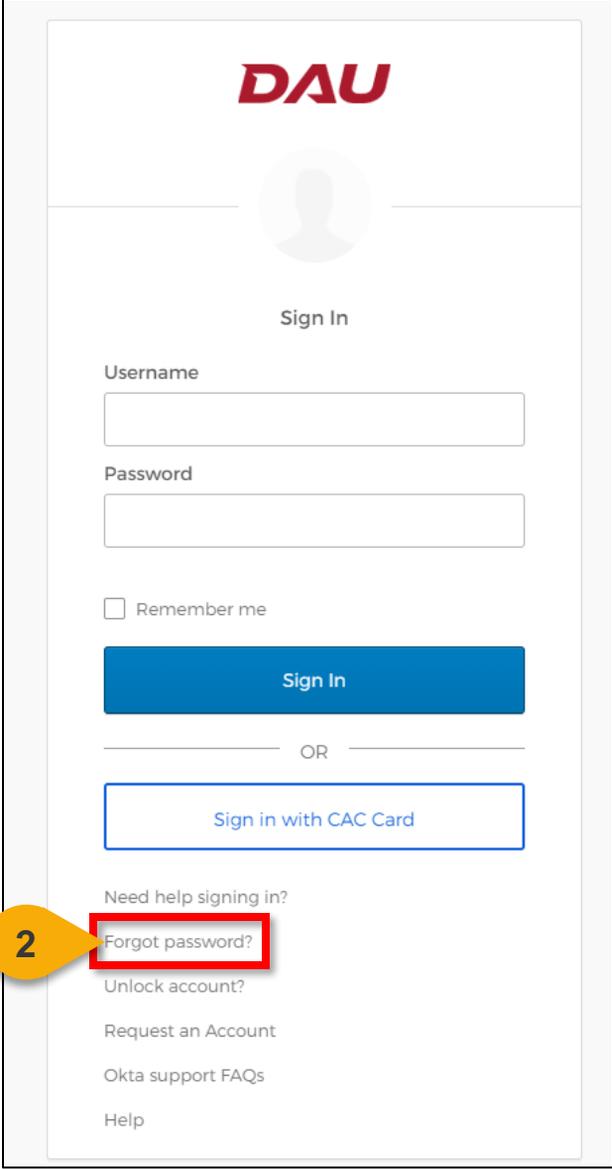
**Step 1:** If you need help signing in, select the **Need help signing in?** link at the bottom of the window.



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 grey silhouette of a person's head and shoulders. Underneath the silhouette, the text "Sign In" is centered. The page contains two input fields: "Username" and "Password". Below these fields is a checkbox labeled "Remember me". A blue "Sign In" button is positioned below the checkbox. Below the button, the word "OR" is centered between two horizontal lines. Underneath the lines is a blue-outlined button labeled "Sign in with CAC Card". At the bottom of the page, there is a list of links: "Need help signing in?", "Forgot password?", "Unlock account?", "Request an Account", "Okta support FAQs", and "Help". A yellow callout bubble with the number "1" inside points to the "Need help signing in?" link, which is also highlighted with a red rectangular border.

# Forgot Password (Cont.1)

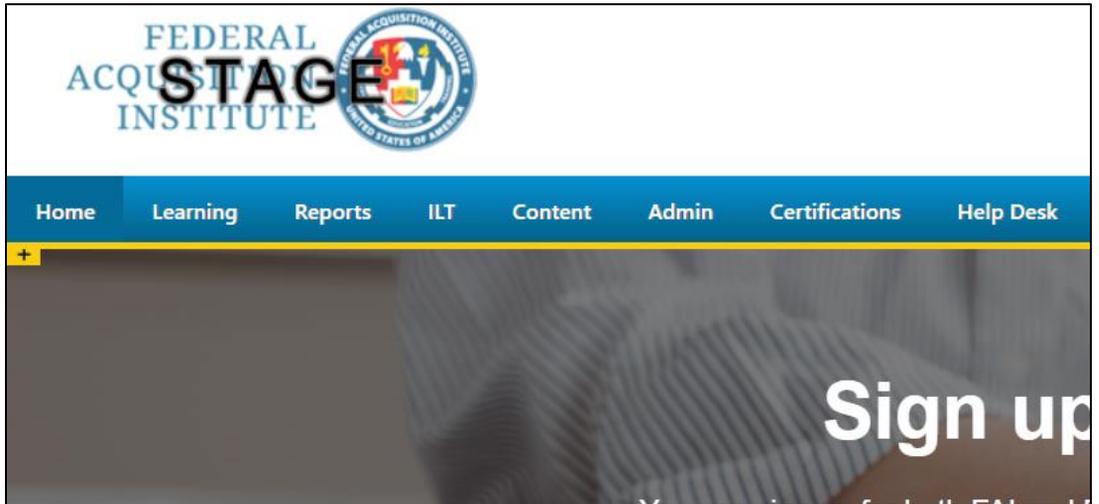
**Step 2:** If you already set up OKTA to reset your password, select the **Forgot Password?** option to have a new password/PIN sent to your email or phone.



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 grey silhouette of a person's head and shoulders. Underneath the silhouette, the text "Sign In" is centered. The page contains two input fields: "Username" and "Password". Below these fields is a checkbox labeled "Remember me". A blue "Sign In" button is positioned below the checkbox. Below the button, the word "OR" is centered between two horizontal lines. Underneath the lines is a button labeled "Sign in with CAC Card". At the bottom of the page, there is a list of links: "Need help signing in?", "Forgot password?", "Unlock account?", "Request an Account", "Okta support FAQs", and "Help". A yellow callout bubble with the number "2" points to the "Forgot password?" link, which is also highlighted with a red rectangular box.

# 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".

**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 \*

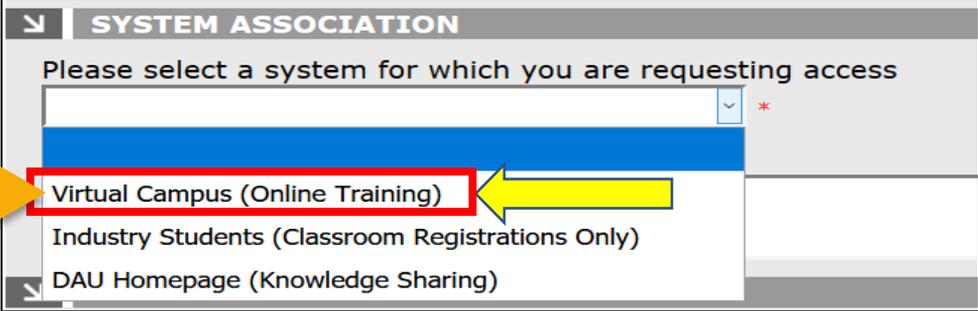
Do you know your DAUID?  Yes  No \*

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.

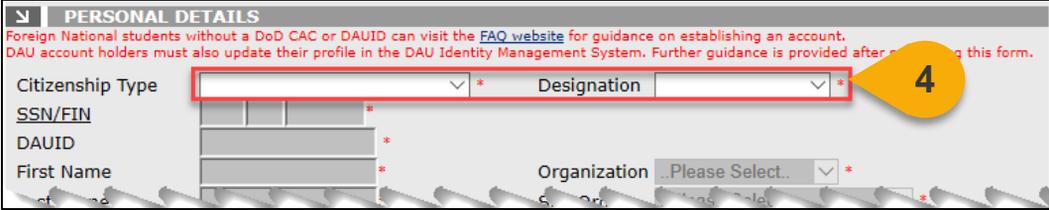
# Request an Account Using the SAAR Form (Cont.1)

**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 rectangular 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 callout bubble with the number "4" points to the "Designation" dropdown menu. The "Citizenship Type" dropdown menu is also highlighted with a red box. Other fields like "SSN/FIN", "DAUID", "First Name", and "Organization" are visible but grayed out. A red asterisk is present next to the "Designation" field.

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



The screenshot shows the "SUPERVISOR DETAILS" section of the form. A red callout bubble with the number "5" points to the "Supervisor Phone" field. The "First Name", "Last Name", "Supervisor Email", and "Supervisor Phone" fields are all highlighted with a red rectangular box. Red asterisks are present next to each of these 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.

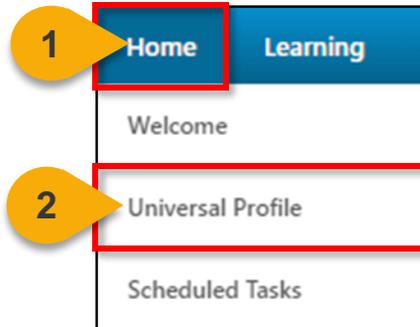
The screenshot shows a web form titled "USER AGREEMENT". The text of the agreement is visible, followed by an "I Agree" checkbox. A yellow callout bubble with the number "6" points to this checkbox. Below the checkbox is a CAPTCHA area with a grid of characters and a "Type the code from the ir" input field. A red error message "The code is not case sensitive." is displayed below the input field. To the right of the CAPTCHA is a "SUBMIT" button, with a yellow callout bubble containing the number "7" pointing to it. At the bottom of the form, there are links for "Contact Us" and "Suggestion Box", and contact information for the DAU Help Desk.

**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.

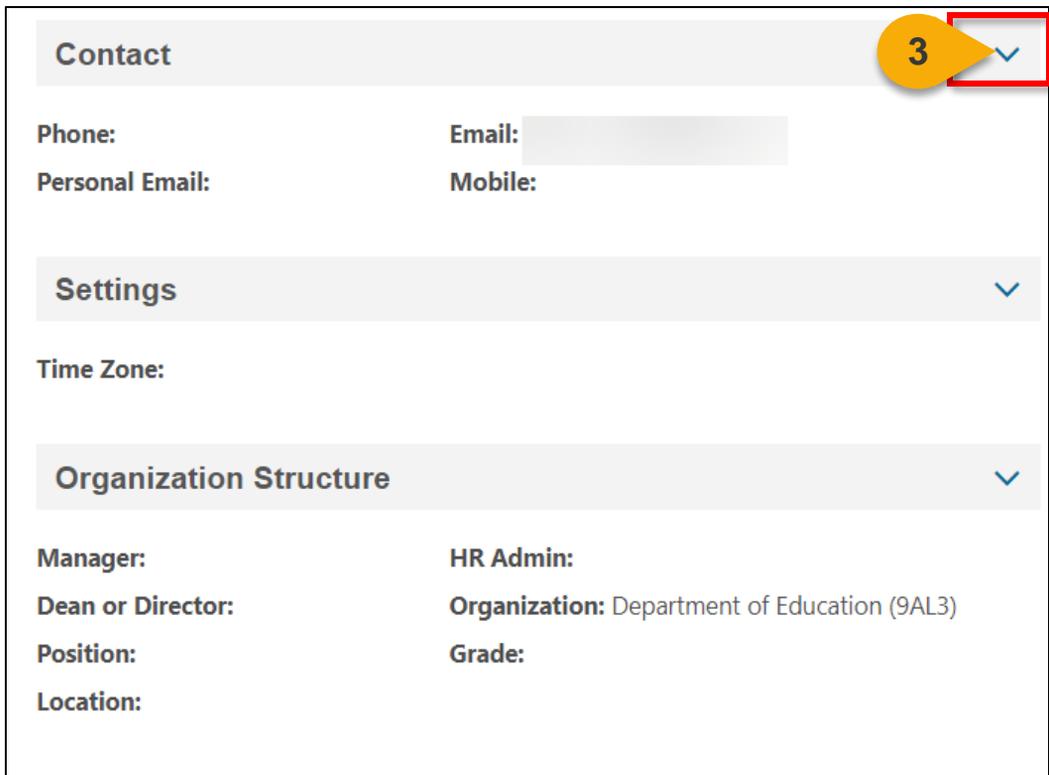
# View User Record

*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.



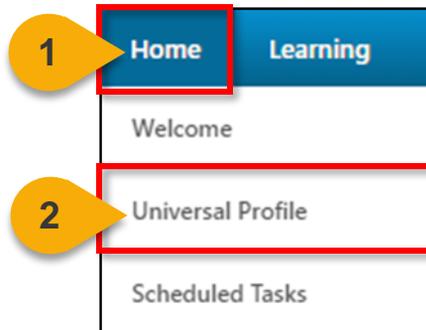
**Step 3:** To expand a section, click on the **arrow** to the right of that section.



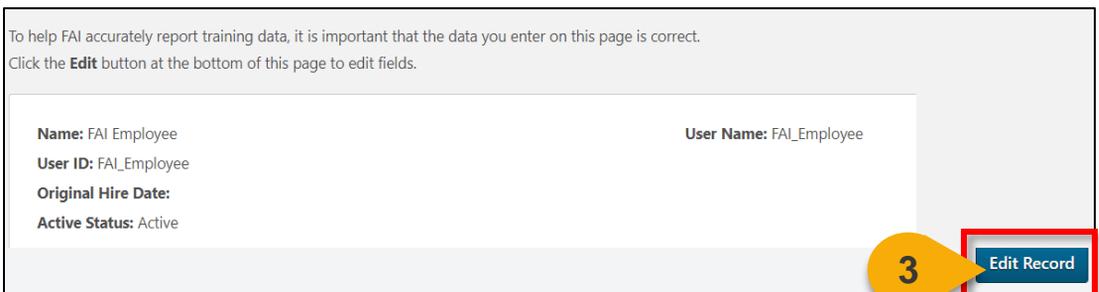
# Edit User Record

*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.

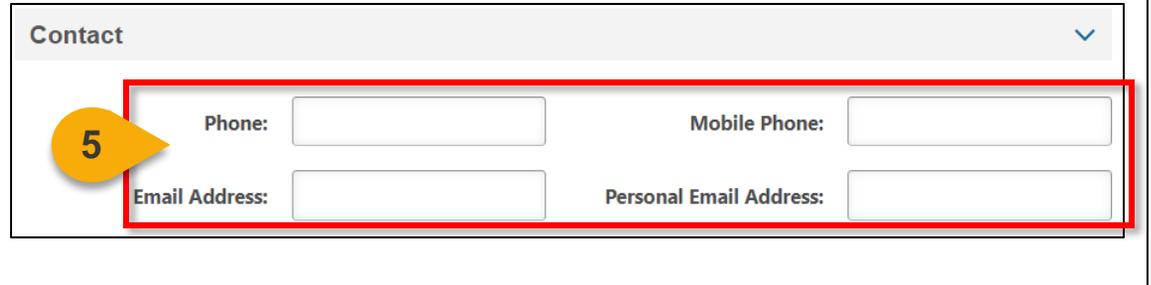


**Step 4:** In the first section at the top of the screen, you can edit **your First Name, Middle Name, Last Name, and User Name.**

A screenshot of the "Edit User Record" form. The form has a title "Edit User Record" and four input fields: "First Name: \* FAI", "Middle Name:", "Last Name: \* Employee", and "User Name: \* FAI\_Employee". A red box highlights the entire form area, and a yellow callout bubble containing the number '4' points to the form.

# 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

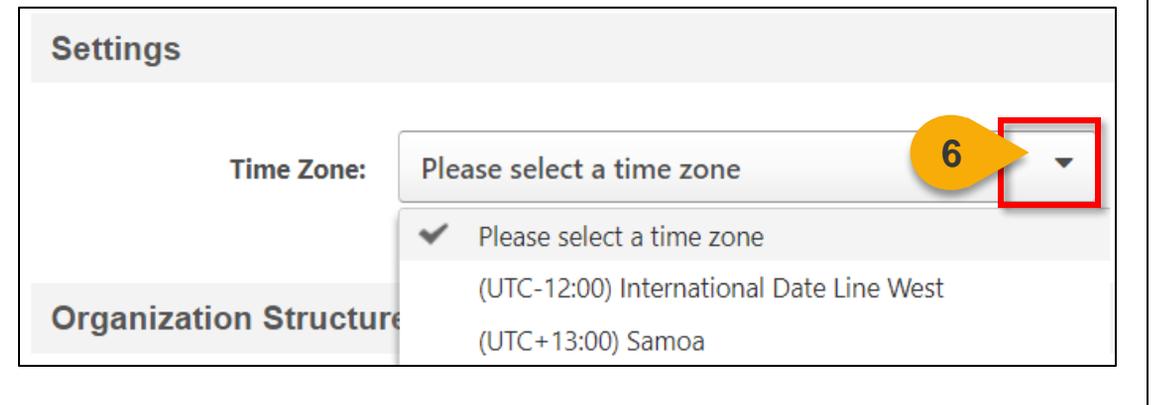
Phone:

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

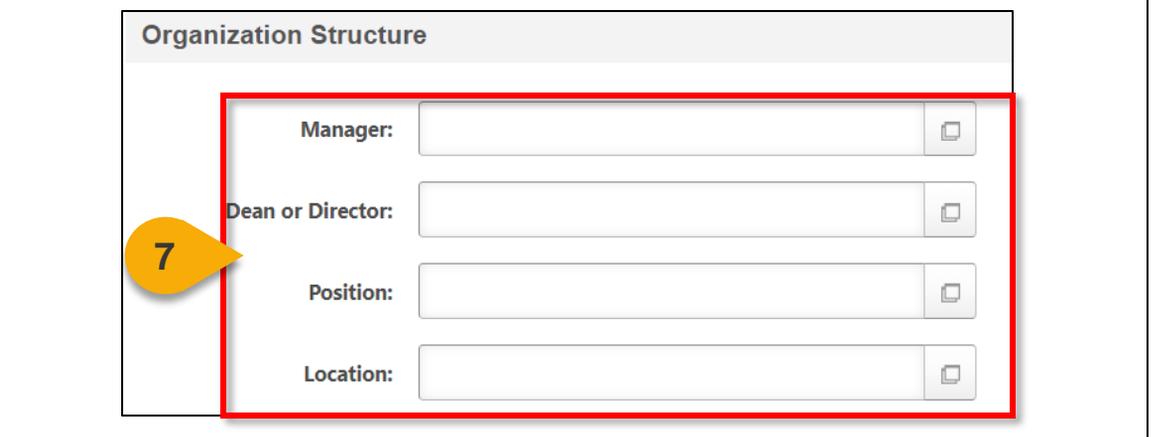
✓ Please select a time zone

(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:

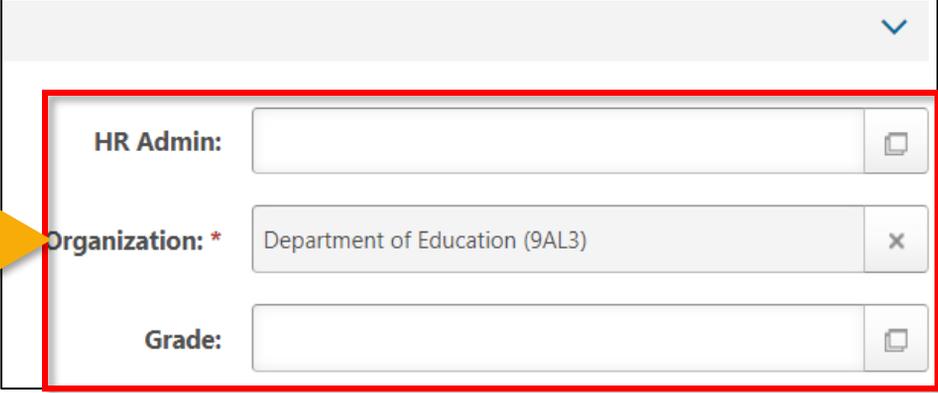
Dean or Director:

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:

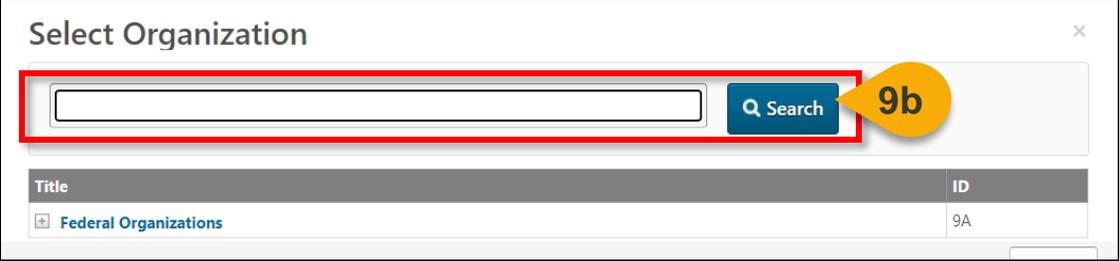
**Step 9a:** To search for your organization, Click on **the box next to Organization**. A popout box will appear.



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
Federal Organizations	9A

# Edit User Record (Cont.3)

**Step 9c:** You can also click **Federal Organizations** 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.

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.

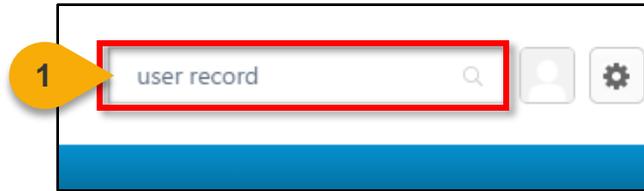
Cancel Save



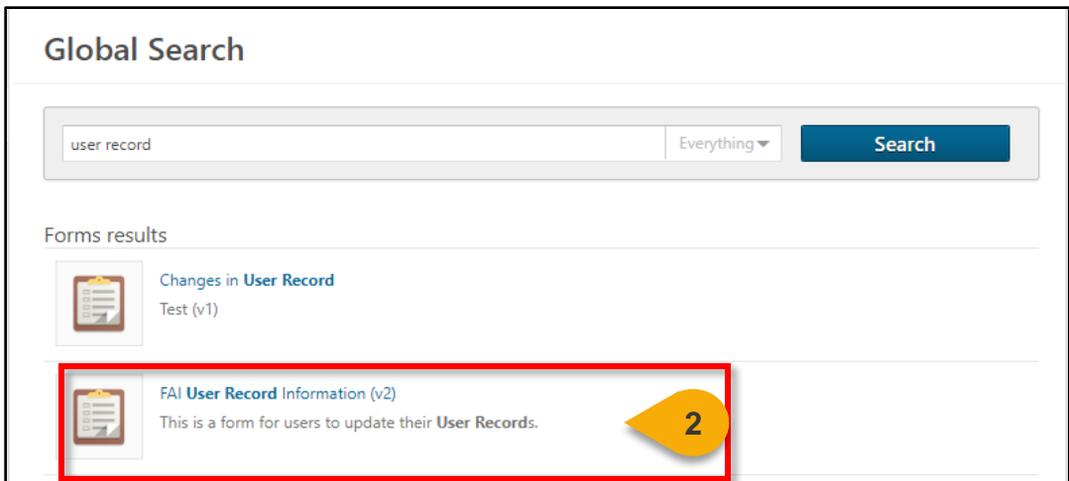
# Edit User Record via Advanced Forms

*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.

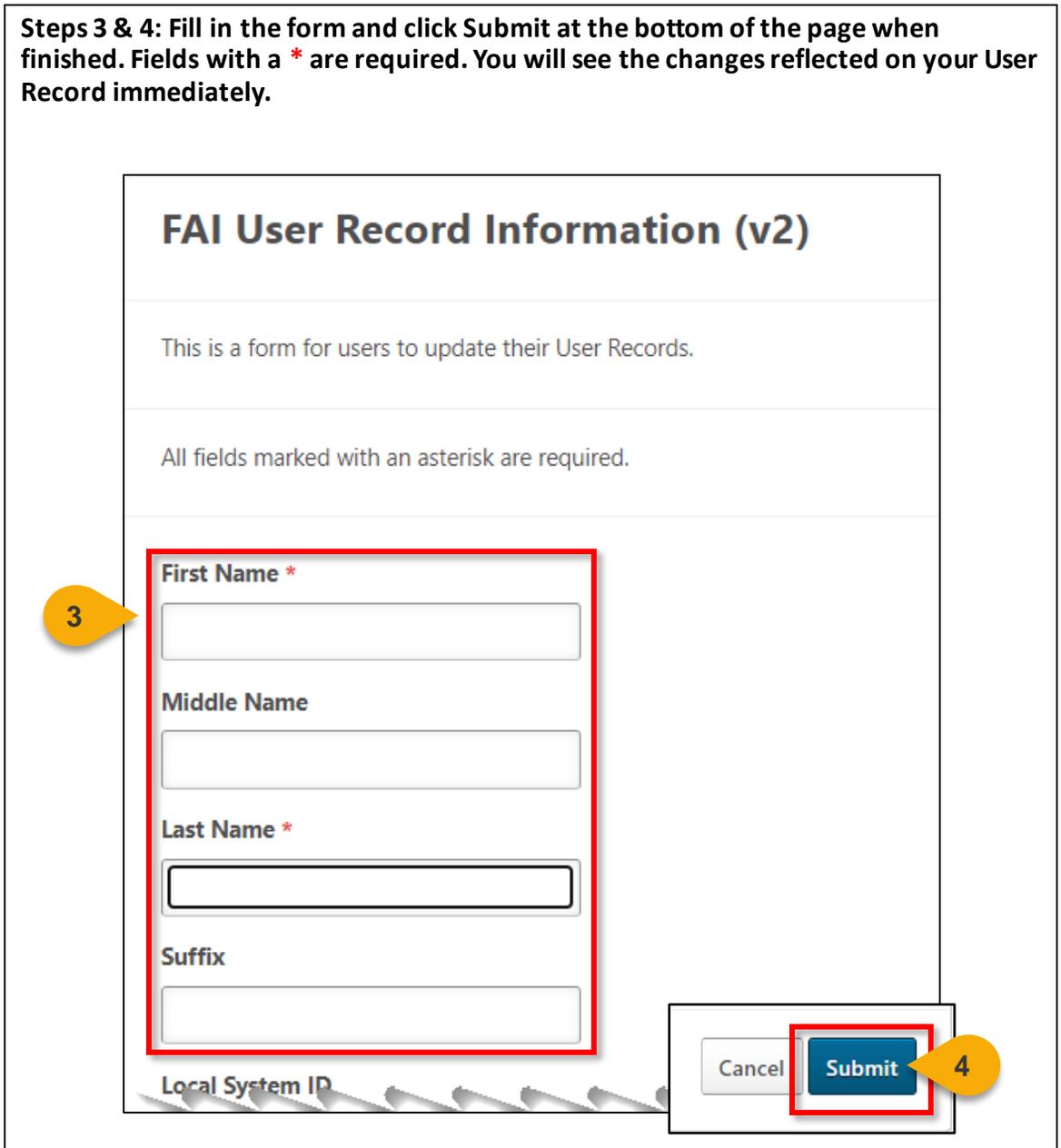
**First Name \***

**Middle Name**

**Last Name \***

**Suffix**

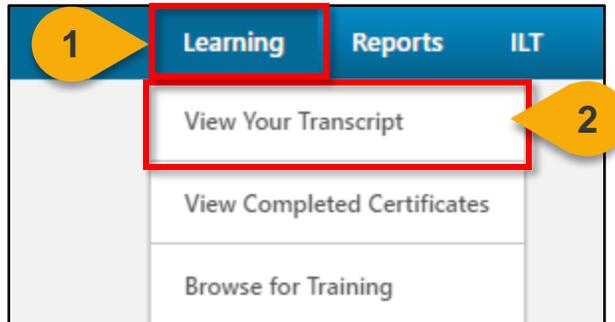
Local System ID



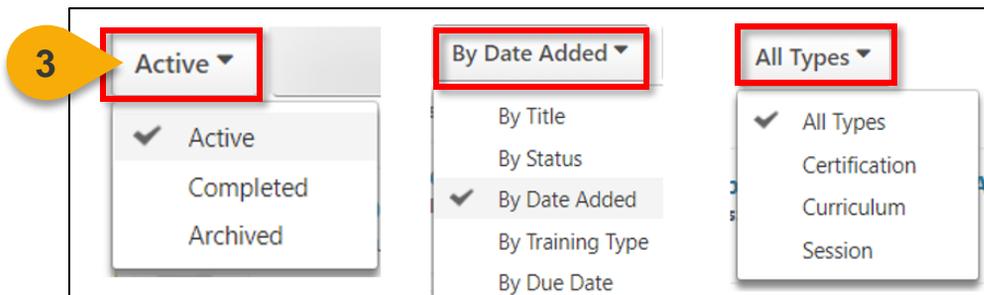
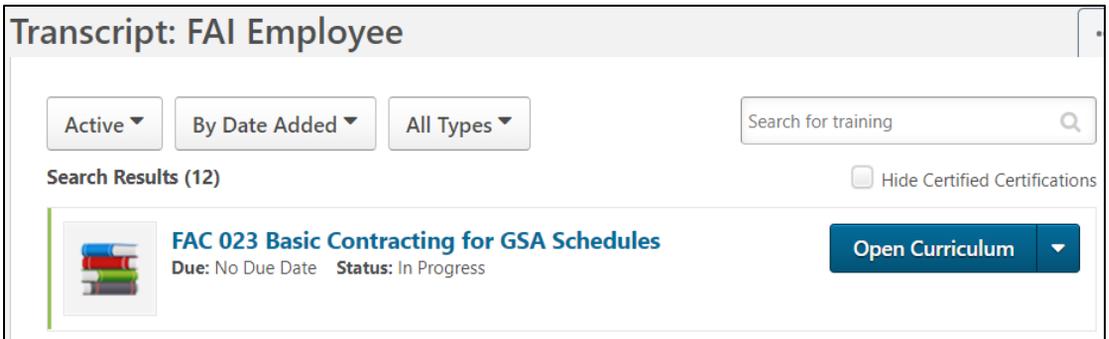
# View Transcript

When you want to view your Transcript...

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



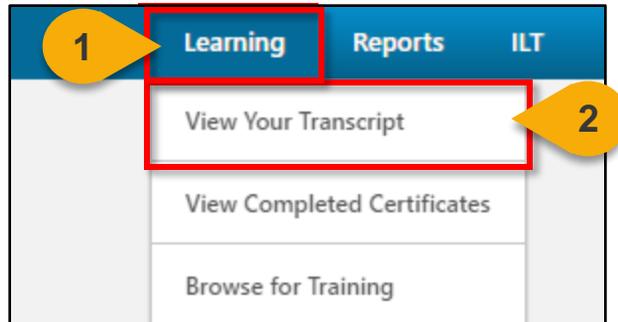
**Step 3:** You will be taken to your Transcript. You can click the **dropdown arrow** filter to show Active, Completed, and Archived courses. By default, only active courses you have not completed will be listed. Click on the **arrows** by each filter for dropdowns to sort the courses.



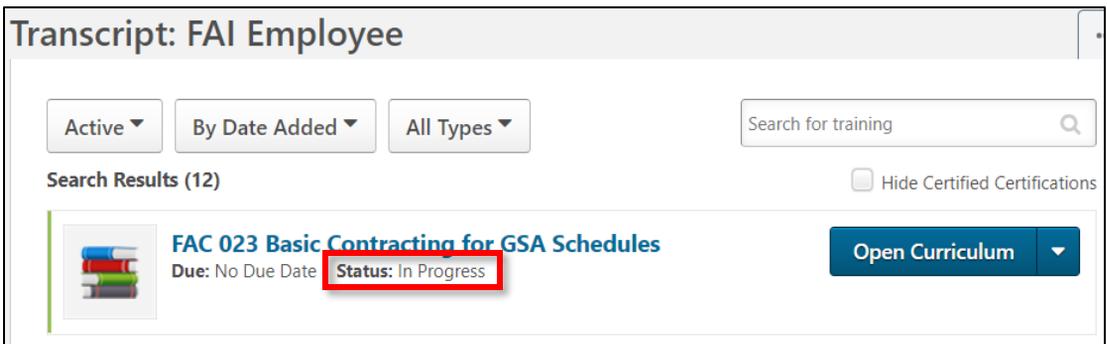
# View Transcript Status

*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.**

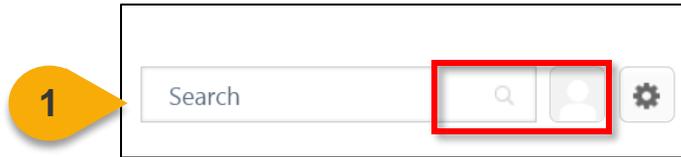


# Use Global Search

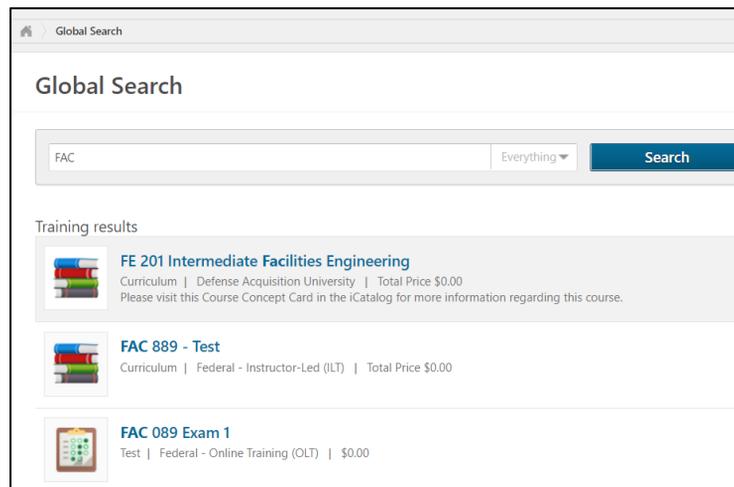
*When you want to search for Training, Certifications, or Forms...*

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

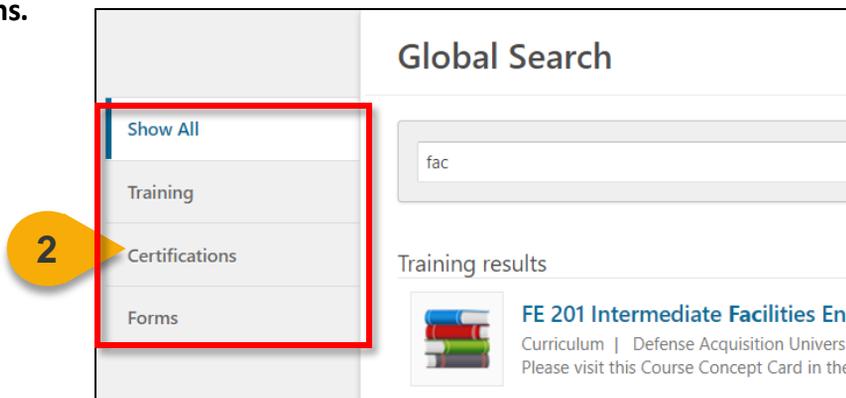
**Step 1:** Enter your desired Search Terms and click the **Magnifying Glass** or hit enter to search.



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.**



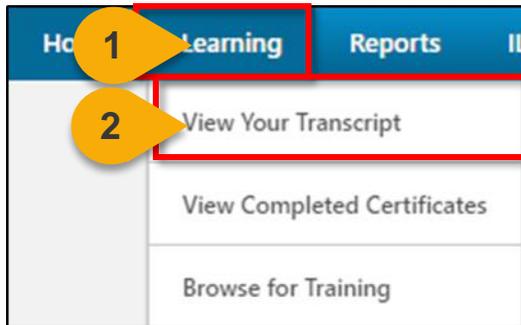
# External Training



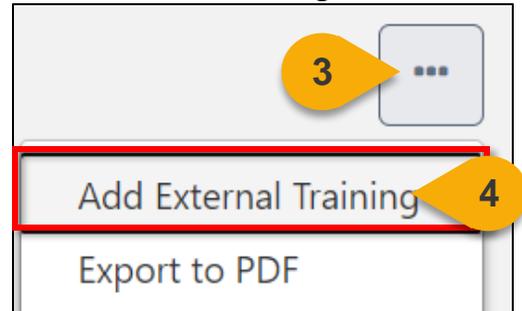
# Request External Training Credit from Transcript

*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.

A form field labeled 'Title \*' with a red border. A yellow callout '5' points to the input area.

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

A form field labeled 'Training Description \*' with a red border. A yellow callout '6' points to the input area.

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

A form field labeled 'Provider \*' with a red border. A yellow callout '7' points to the input area.

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

Form fields for 'Training Dates \*'. It includes 'Start Date' and 'End Date' fields, each with a calendar icon. A red box highlights both fields, and a yellow callout '8' points to the 'End Date' field.

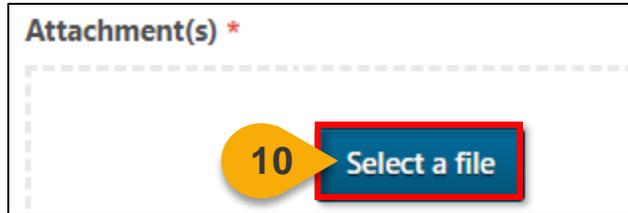
**Step 9:** Enter the training hours for your external training in the respective **Hours** and **Minutes** fields.

Form fields for 'Training Hours \*'. It includes 'Hours' and 'Minutes' fields, each with a numeric input box. A red box highlights both fields, and a yellow callout '9' points to the 'Minutes' field.

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

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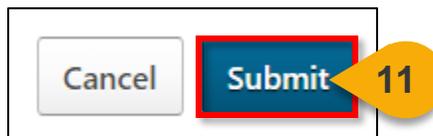
**Step 10:** Click **Select File** to add proof of your successful completion of your External Training.



Attachment(s) \*

10 Select a file

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

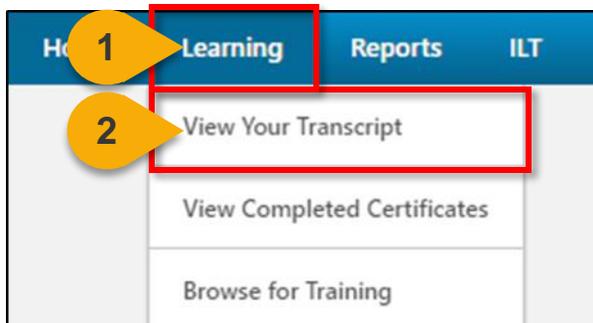


Cancel Submit 11

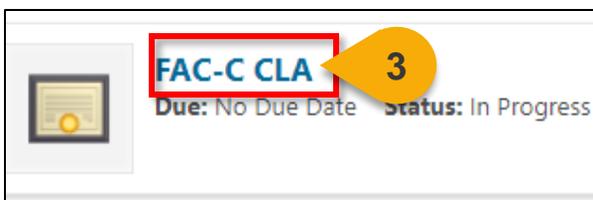
# Request External Training Credit Within a Certification

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

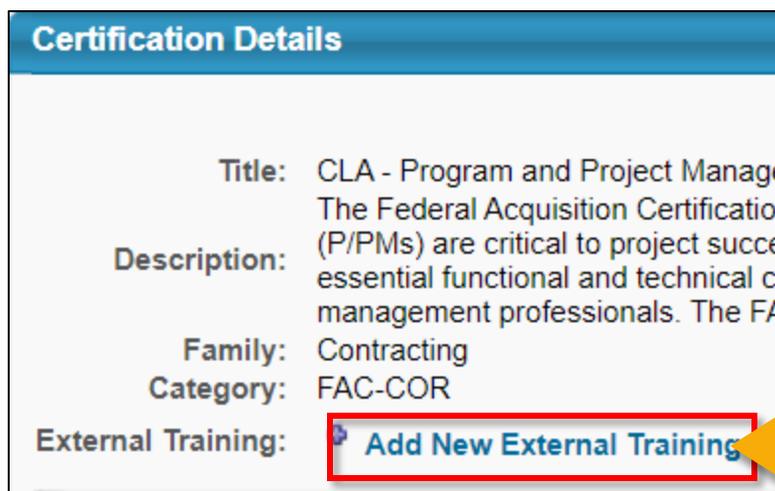
**Steps 1 & 2:** Hover over the **Learning** tab and click **View Your Transcript**.



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

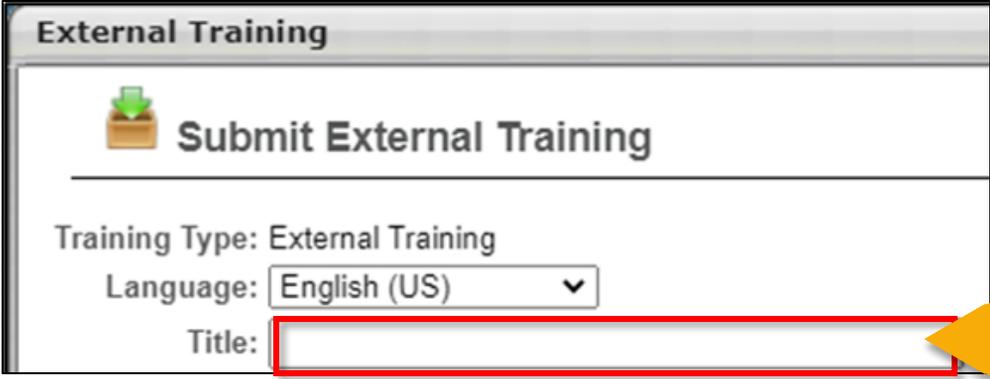


**Step 4:** Click on **Add New External Training**.



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

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



**External Training**

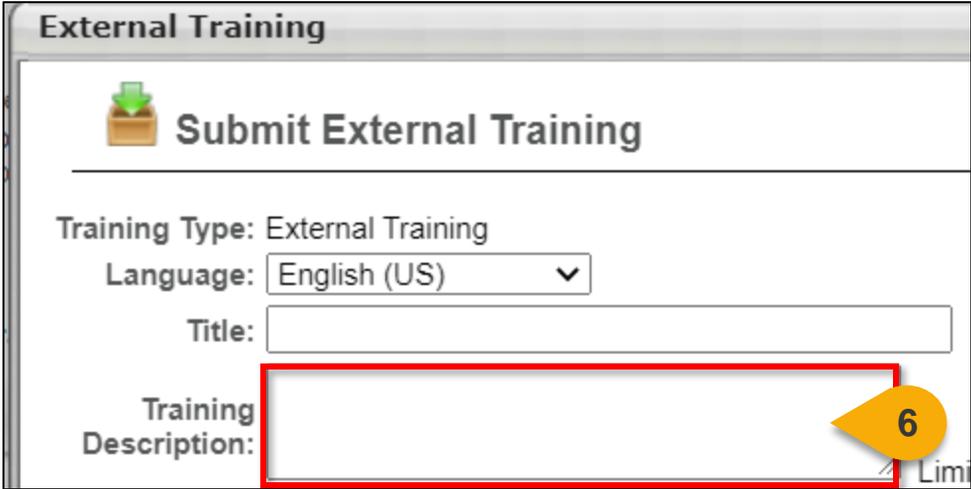
 **Submit External Training**

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   

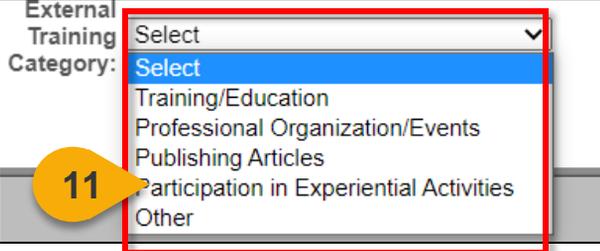
**Step 9:** Enter the number of hours and minutes of the external training into the **Training Hours** text fields.

Training Hours:  Hours  Minutes 

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

External Training Category:   

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

External Training Category:  

- Select
- 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:  

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

15

**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:

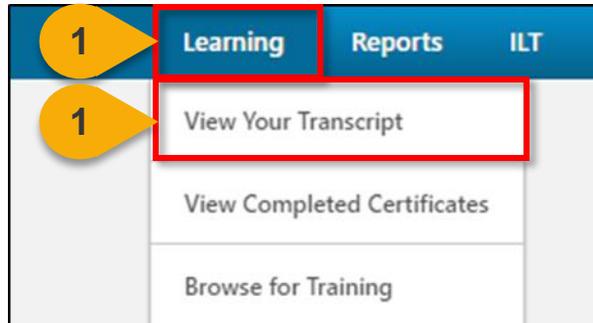
**17**



# Add External Training to a Certification

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

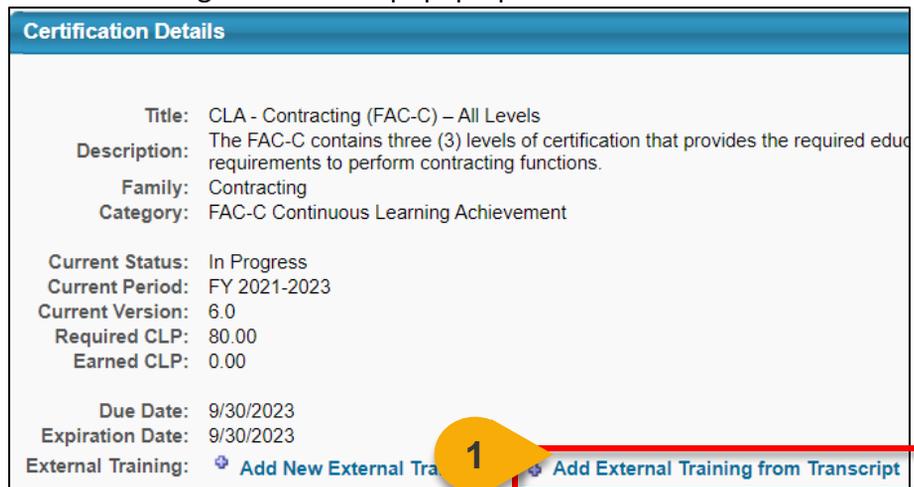
**Steps 1 & 2:** Hover over the **Learning** tab and then click **View Your Transcript**.



**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.

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

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

TITLE	CLP	STATUS
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)

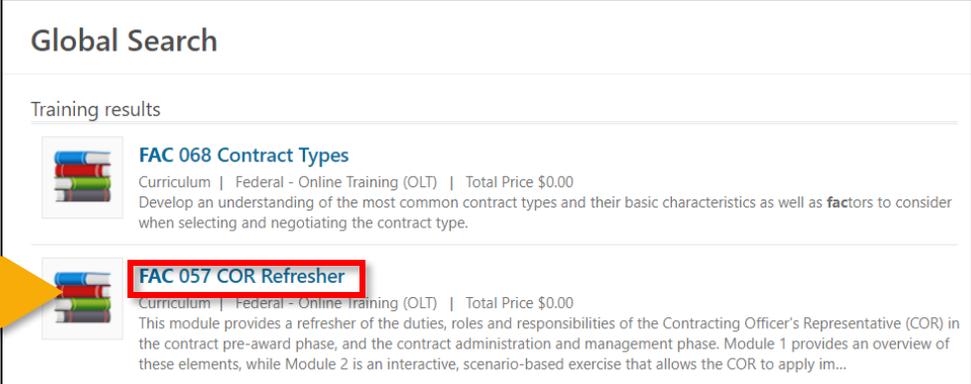
*When you want to register for Online Training...*

**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 box with the word "Search" on the left, a magnifying glass icon in the center, and a gear icon on the right. A red box highlights the magnifying glass icon, and a yellow callout bubble with the number "1" points to it.

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



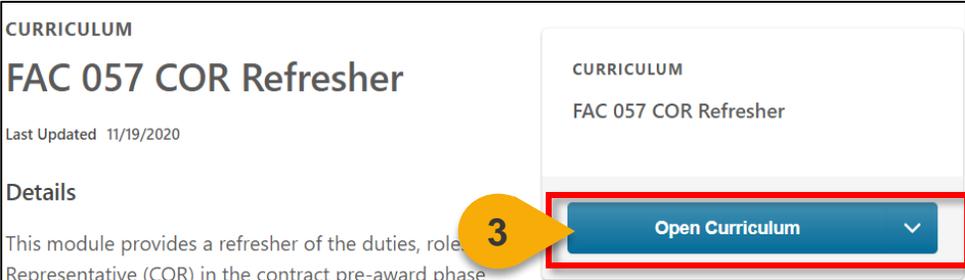
**Global Search**

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 "FAC 057 COR Refresher" title.

**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** ▾

A yellow callout bubble with the number "3" points to the "Open Curriculum" button.



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

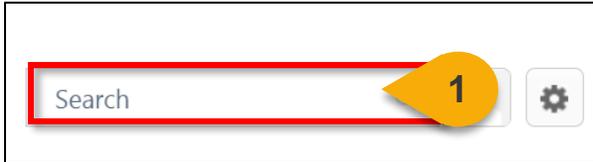
# Instructor -Led Training



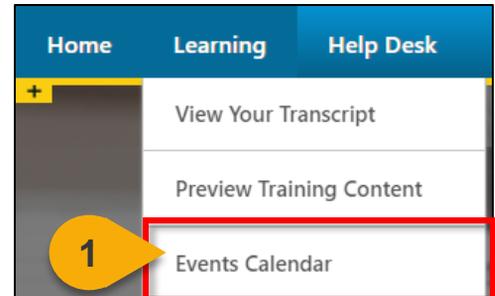
# Register for Instructor-Led Training (ILT)

*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.**



Search



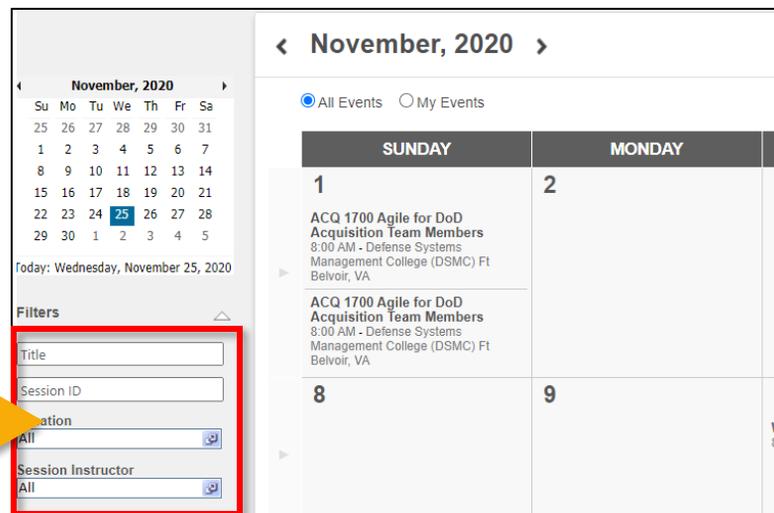
Home Learning Help Desk

View Your Transcript

Preview Training Content

Events Calendar

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



< November, 2020 >

All Events My Events

SUNDAY	MONDAY
1 ACQ 1700 Agile for DoD Acquisition Team Members 3:00 AM - Defense Systems Management College (DSMC) Ft Belvoir, VA	2 ACQ 1700 Agile for DoD Acquisition Team Members 3:00 AM - Defense Systems Management College (DSMC) Ft Belvoir, VA
8	9

Filters

Title

Session ID

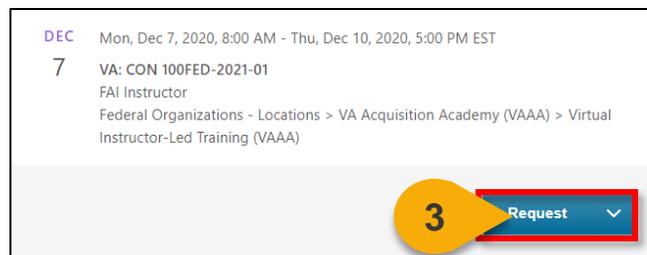
Location

All

Session Instructor

All

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



DEC Mon, Dec 7, 2020, 8:00 AM - Thu, Dec 10, 2020, 5:00 PM EST

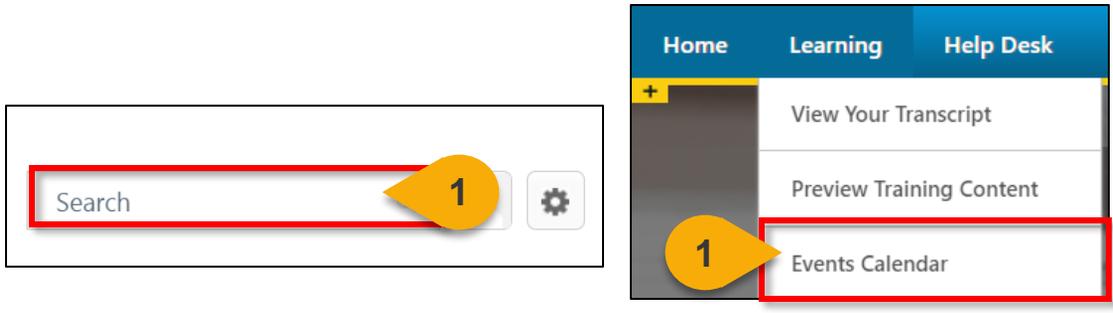
7 VA: CON 100FED-2021-01  
FAI Instructor  
Federal Organizations - Locations > VA Acquisition Academy (VAAA) > Virtual Instructor-Led Training (VAAA)

Request

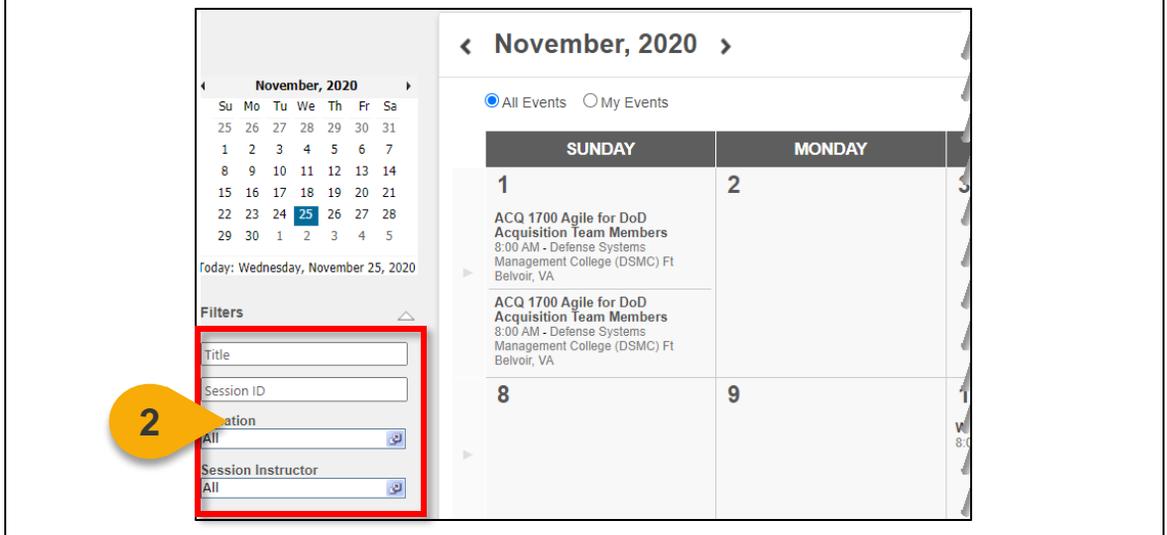
# Register for Instructor-Led Training (ILT)

*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**.

Global Search

1  Training Search

Refine search

Training results (132)

2 **CMC 200 Fees, Financing, and Payments**  
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.

3 **Notify Me** ▾

EVENT

Select a Session ▾

Save for Later

3 **Notify Me of New Sessions**

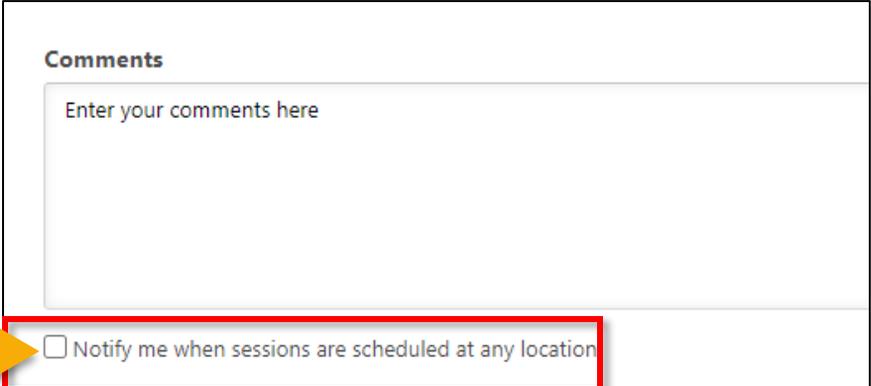
**Step 4:** You have the option to select to be notified of Sessions held in a specific location. Enter the **Location** field to do this.

Interest Tracking

4 **Location**  
Select a Location

# 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”.



The screenshot shows a form with a section titled "Comments". Below the title is a text input field with the placeholder text "Enter your comments here". Below the input field is a checkbox labeled "Notify me when sessions are schedule at any location". A red rectangular box highlights the checkbox and its label. A yellow callout bubble with the number "5" points to the checkbox.

**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**.

The 'Withdraw Registration' form contains the following text: 'If you withdraw your registration for this session, you will immediately be withdrawn from the roster.' Below this is a 'Session Details' section with the following information: 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. Below the session details is a 'SESSION WITHDRAWAL OPTIONS' section. It features a dropdown menu with the text 'Please select a reason' and a list of options: 'Please select a reason', 'Other', 'Illness/Family Emergency', 'Inclement Weather', 'Leave', 'No Longer Needed', 'Reschedule Due to Conflict', 'TDY', 'Technology Issue', and 'Workload'. A yellow callout '4' points to the dropdown menu. Below the dropdown menu are two buttons: 'Submit' and 'Cancel'. A yellow callout '5' points to the 'Submit' button.

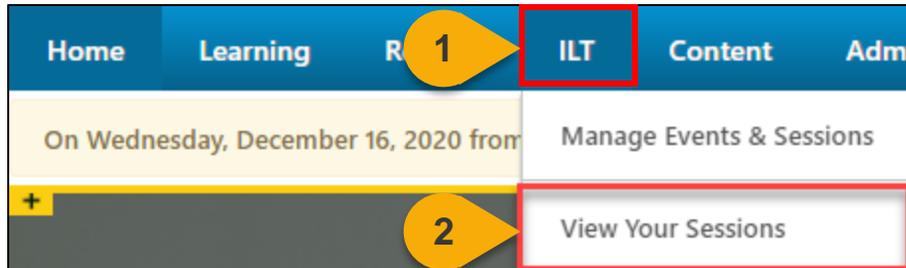


# Sessions and Rosters

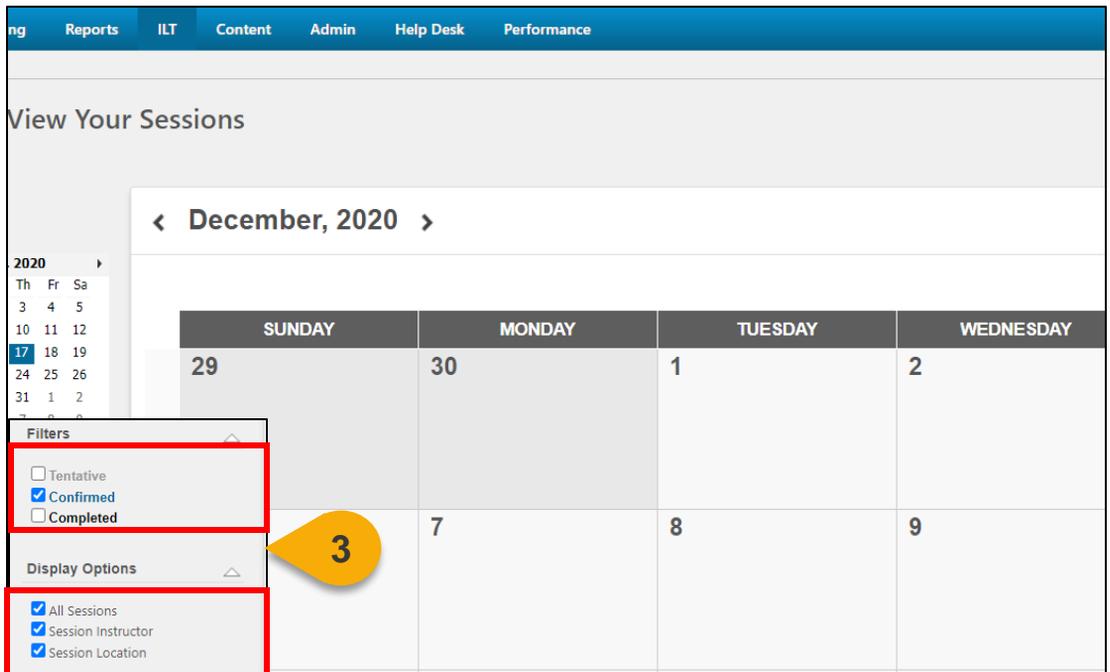
# View Upcoming Sessions

*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.



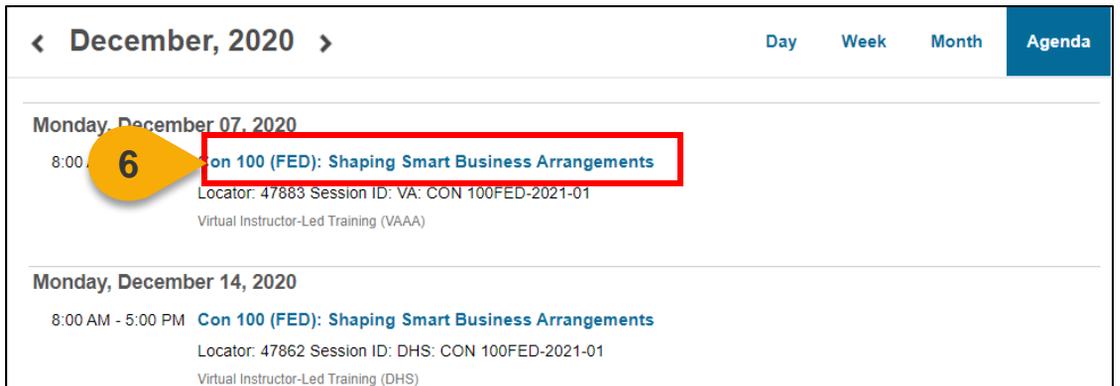
The screenshot shows a calendar interface for December 2020. At the top, there are navigation arrows, the month 'December, 2020', and view options 'Day' and 'Week'. A yellow callout bubble with the number '4' points to a blue 'Agenda' tab, which is highlighted with a red box. Below the navigation, two sessions are listed for Monday, December 07, 2020 and Monday, December 14, 2020. Each session is titled 'Con 100 (FED): Shaping Smart Business Arrangements' and includes details like 'Locator: 47883 Session ID: VA: CON 100FED-2021-01' and 'Virtual Instructor-Led Training (VAAA)'.

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



The screenshot shows the same calendar interface as in Step 4. A yellow callout bubble with the number '5' points to the left and right navigation arrows of the month 'December, 2020', which are highlighted with red boxes. The 'Day' view option is also visible.

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



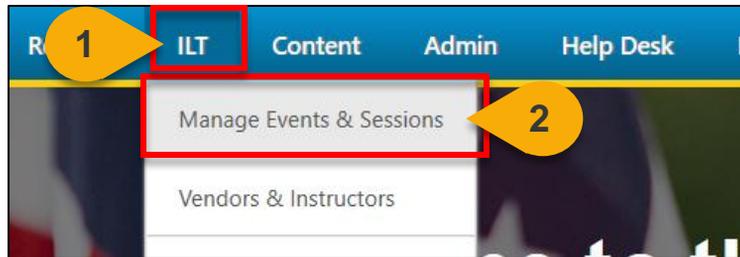
The screenshot shows the same calendar interface. A yellow callout bubble with the number '6' points to the event title 'Con 100 (FED): Shaping Smart Business Arrangements' for Monday, December 07, 2020, which is highlighted with a red box. The 'Agenda' tab is also highlighted with a red box. The session details below the title are visible.



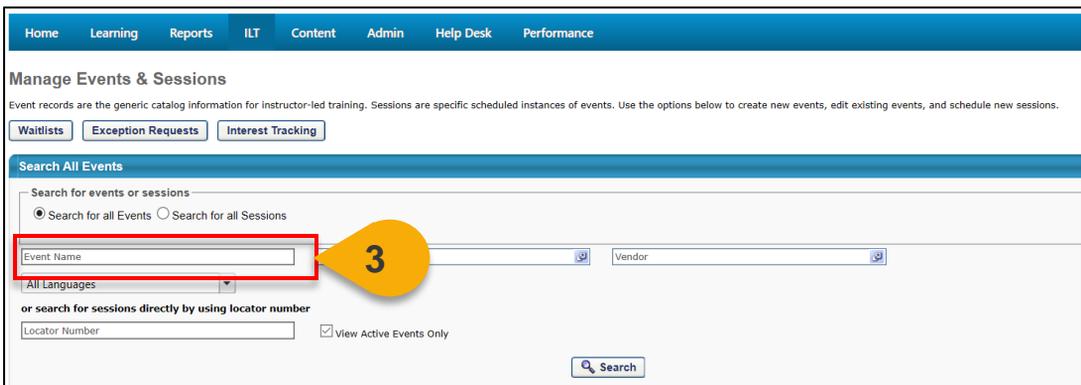
# View Session Roster

*When you want to view the Roster for an ILT...*

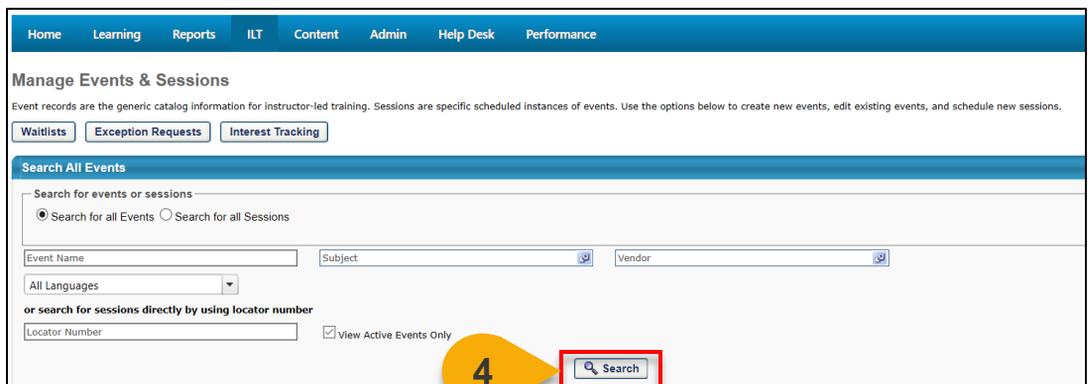
**Steps 1 & 2:** Hover over the ILT tab and select **Manage Events and Sessions**.



**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**.



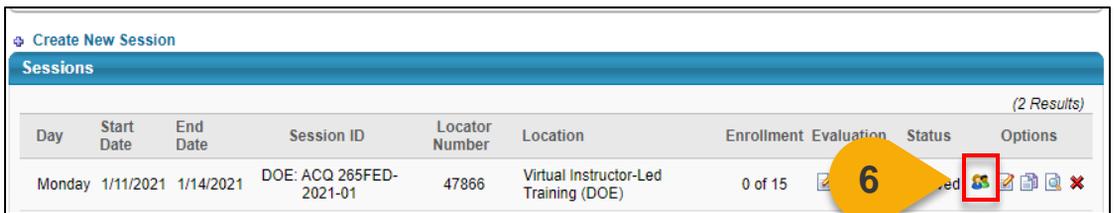
# View Session Roster (Cont.1)

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



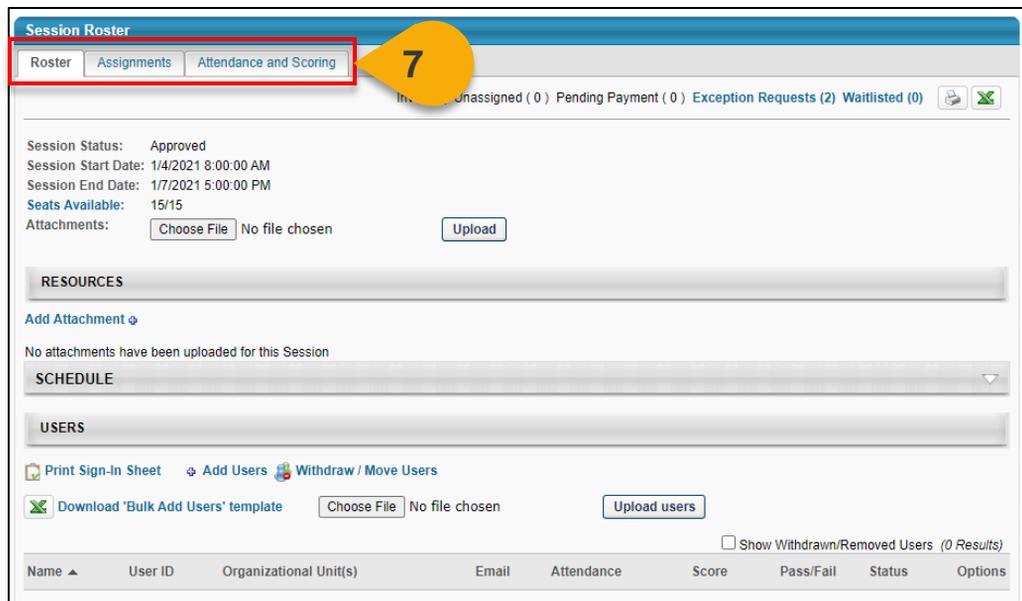
Subjects Vendor	Language(s)	Tentative Sessions	Approved Sessions	Completed Sessions	Evaluation	Options
Federal - USAID PDT - Center for Continuous Learning	English (US)	0	2	0		
Federal - Homeland Security Acquisition Institute (HSAI)	English (US)	0	2	0		
Federal - DOE Acquisition Learning Center	English (US)	0	2	0		

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



Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15			

**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.



**Session Roster**

**Roster** | Assignments | Attendance and Scoring

Unassigned (0) Pending Payment (0) Exception Requests (2) Waitlisted (0)

Session Status: Approved  
Session Start Date: 1/4/2021 8:00:00 AM  
Session End Date: 1/7/2021 5:00:00 PM  
Seats Available: 15/15

Attachments:  No file chosen

**RESOURCES**

Add Attachment

No attachments have been uploaded for this Session

**SCHEDULE**

**USERS**

No file chosen

Show Withdrawn/Removed Users (0 Results)

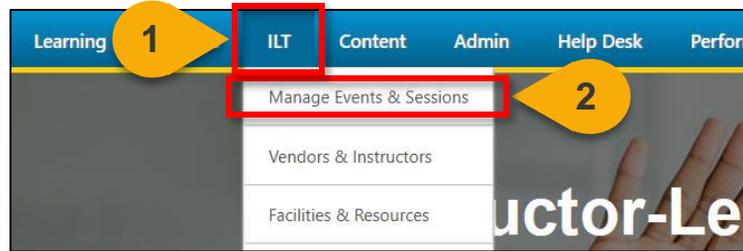
Name	User ID	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options
------	---------	------------------------	-------	------------	-------	-----------	--------	---------



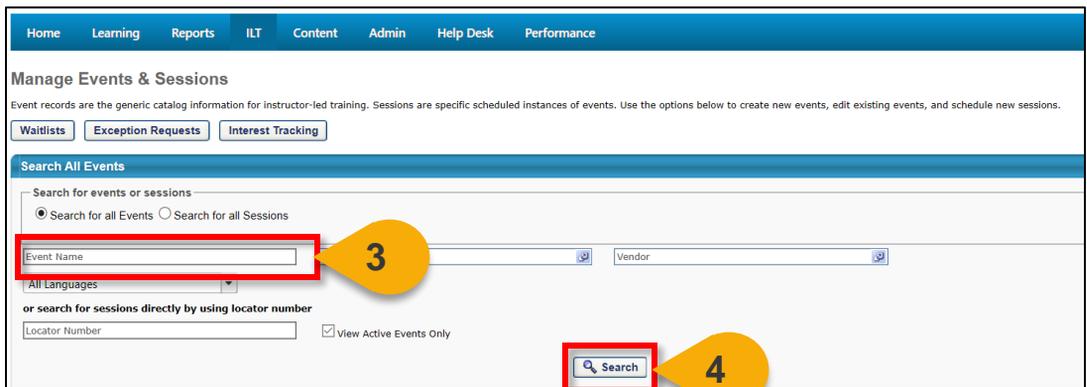
# Manage Roster

When you want to edit a Roster...

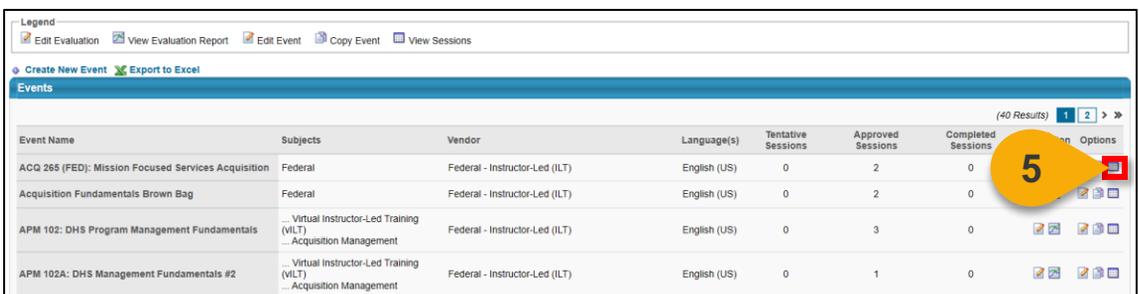
**Steps 1 & 2:** Hover over the **ILT** tab and select **Manage Events & Sessions**.



**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.

[Create New Session](#)

### Sessions

(2 Results)

Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options			
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15						
Monday	1/4/2021	1/7/2021	EPA: ACQ 265FED-2021-01	47875	Virtual Instructor-Led Training (EPA)	0 of 15			Approved			

**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.

### USERS

[Print Sign-In Sheet](#) [Email Registered Users](#) [Add Users](#) [Withdraw / Move Users](#)

[Download 'Bulk Add Users' template](#)  No file chosen

Show Withdrawn/Removed Users (2 Results)

Name	User ID	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options				
		General Services Administration (Organization)		0 of 1 Parts Attended								
		General Services Administration (Organization)		0 of 1 Parts Attended			Registered					

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

### FAI 003 - FAI Registrar Event One Roster

#### Session Roster

[Roster](#) [Attendance and Scoring](#)

Inventory Unassigned ( 0 ) Pending Payment ( 0 ) Excepti **8** [Waitlisted \(2\)](#)

Session Status: Approved  
Session Start Date: 1/28/2021 8:00:00 AM  
Session End Date: 1/28/2021 5:00:00 PM  
[Seats Available:](#) 0/2



# 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.

Order	Name	Organization Unit(s)	Original Request Date	Response Comments	Respond
1		GENERAL SERVICES ADMINISTRATION (GSA) (Organization)	12/16/2020 2:00:43 PM		<input type="radio"/> Grant <input type="radio"/> Deny
2		General Services Administration (Organization)	12/16/2020 2:00:45 PM		<input type="radio"/> Grant <input type="radio"/> Deny

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

2 General Services Administration (Organization)

**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.

Order	Name	Organization Unit(s)	Original Request Date	Response Comments	Respond
1		GENERAL SERVICES ADMINISTRATION (GSA) (Organization)	12/16/2020 2:00:43 PM		<input type="radio"/> Grant <input type="radio"/> Deny
2		General Services Administration (Organization)	12/16/2020 2:00:45 PM		<input type="radio"/> Grant <input type="radio"/> Deny

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

2 General Services Administration (Organization)



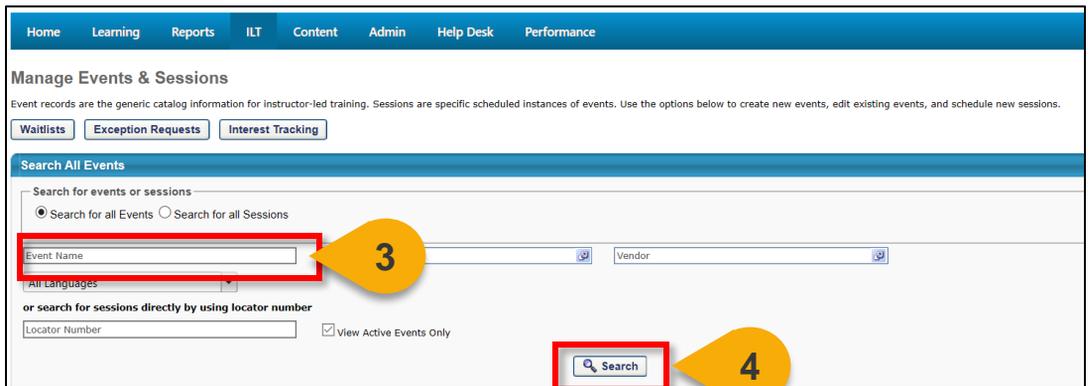
# Update Roster via Upload

*When you want to upload an updated Roster...*

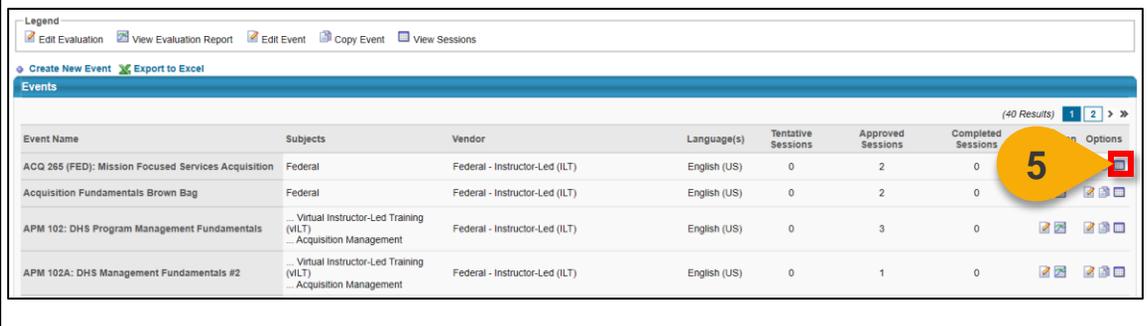
**Steps 1 & 2:** Hover over the **ILT** tab and select **Manage Events & Sessions**.



**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.

☛ Create New Session

Sessions (2 Results)

Day	Start Date	End Date	Session ID	Locator Number	Location	Enrollment	Evaluation	Status	Options
Monday	1/11/2021	1/14/2021	DOE: ACQ 265FED-2021-01	47866	Virtual Instructor-Led Training (DOE)	0 of 15			
Monday	1/4/2021	1/7/2021	EPA: ACQ 265FED-2021-01	47875	Virtual Instructor-Led Training (EPA)	0 of 15			Approved

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

SCHEDULE

USERS

Print Sign-In Sheet    ☛ Add Users    Withdraw / Move Users

**Download 'Bulk Add Users' template**    Browse...    Upload users

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

	A	B	C	D	E	F	G	H
1	<b>Instructions</b>							
2	emails? - For yes reply with 'Yes' and for no reply w Yes							
3	Enter user ID in the below column							
4	Do not remove instructions or change any headers							
5								
6			<b>User ID</b>					
7								
8								



# Update Roster via Upload (Cont.2)

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

The screenshot shows the 'USERS' section of the Roster page. At the top are tabs for 'SCHEDULE' and 'USERS'. Below the 'USERS' tab are links for 'Print Sign-In Sheet', 'Add Users', and 'Withdraw / Move Users'. A 'Download 'Bulk Add Users' template' link is also present. A file upload area contains a 'Browse...' button, which is highlighted with a red box and a yellow callout bubble with the number '9'. To the right of the 'Browse...' button is an 'Upload users' button.

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

This screenshot is similar to the previous one, showing the 'USERS' section. The 'Upload users' button is now highlighted with a red box, and a yellow callout bubble with the number '10' points to it.

The new Users will appear on the Roster.

The screenshot shows the 'USERS' section with a table of users. The table has columns for Name, User ID, Organizational Unit(s), Email, Attendance, Score, Pass/Fail, Status, and Options. Two new user entries are highlighted with a red box. Both entries are for 'General Services Administration (Organization)' and show '0 of 1 Parts Attended' and 'Registered' status.

Name	User ID	Organizational Unit(s)	Email	Attendance	Score	Pass/Fail	Status	Options
[Redacted]	[Redacted]	General Services Administration (Organization)	[Redacted]	0 of 1 Parts Attended			Registered	[Icons]
[Redacted]	[Redacted]	General Services Administration (Organization)	[Redacted]	0 of 1 Parts Attended			Registered	[Icons]



# 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**.

The screenshot shows the 'Session Roster' interface. At the top, there are tabs for 'Roster' and 'Attendance and Scoring'. Below the tabs, session details are listed: Session Status: Approved, Session Start Date: 1/25/2021 8:00:00 AM, Session End Date: 1/25/2021 5:00:00 PM, and Seats Available: 5/7. There is an 'Attachments' section with a 'Choose File' button and 'No file chosen' text, and an 'Upload' button. Below this is a 'RESOURCES' section with an 'Add Attachment' link. A message states 'No attachments have been uploaded for this Session'. The 'SCHEDULE' section is empty. The 'USERS' section is at the bottom, containing a 'Print Sign-In Sheet' icon, an 'Email Report' icon, a red-bordered 'Add Users' button with a yellow callout bubble containing the number 1, and a 'Withdraw / Move Users' icon. At the very bottom, there is a 'Download Bulk Add Users template' icon, another 'Choose File' button with 'No file chosen' text, and an 'Upload users' button.

**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.

The screenshot shows the 'Select User' popup window. It starts with the text 'Search is limited to 1000 records only'. Below this is a 'Search' section with a blue header. There are four input fields: 'Last Name:', 'ID:', 'Manager's Last Name:', and 'First Name:'. The 'Last Name' and 'First Name' fields are highlighted with red boxes and a yellow callout bubble containing the number 2. There is also a 'Search' button with a magnifying glass icon. Below the search fields, it says '(0 Results)'. At the bottom, there is a 'Search Results' section with a blue header and a table with columns: 'ADD', 'NAME', 'IDENTIFIER', 'ID', 'USER NAME', and 'MANAGER'. The table is currently empty. A 'Close' button is located at the bottom center.

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

## Step 3: Click Search.

**Select User**

Search is limited to 1000 records only

**Search**

Last Name:  ID:  Manager's Last Name:   
First Name:  User Name:  **3**

(0 Results)

**Search Results**

ADD	NAME	IDENTIFIER	ID	USER NAME	MANAGER
-----	------	------------	----	-----------	---------

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

**Select User**

Search is limited to 1000 records only

**Search**

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

**Search Results**

ADD	NAME	IDENTIFIER	ID	USER NAME
<input type="button" value="⊕"/>	Student 8, FAI	Federal Organizations (Organization) FAI Admin (Manager)	FAI_Student8	FAI_S
<input type="button" value="⊕"/>	Student2, FAI	Acquisition Professional Career Program (Organization) FAI Manager1 (Manager)	FAI_Student2	FAI_S
<input type="button" value="⊕"/>	4 FAI	Bureau Of Immigration And Customs Enforcement (Organization) FAI Manager2 (Manager)	FAI_Student3	FAI_S



# 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.

**Session Roster**

Roster Attendance and Scoring

Session Status: Approved  
Session Start Date: 1/25/2021 8:00:00 AM  
Session End Date: 1/25/2021 5:00:00 PM  
Seats Available: 5/7  
Attachments: Choose File No file chosen Upload

**5** **USERS**

Add Pending Users to Roster  Send emails

Name	User ID	Locator
Student9, FAI	FAI_Student9	47900

**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**.

**6**

The total number of users exceeds available seats for the session.

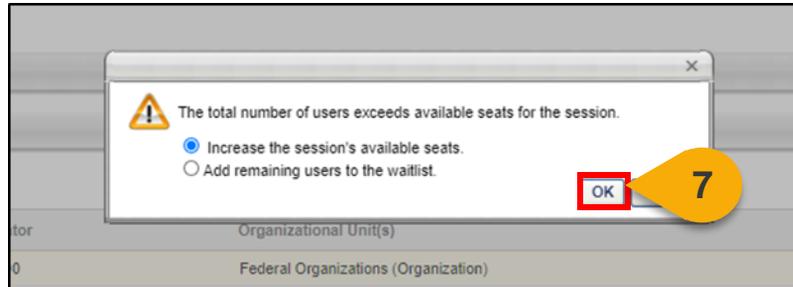
Increase the session's available seats.  
 Add remaining users to the waitlist.

OK Close

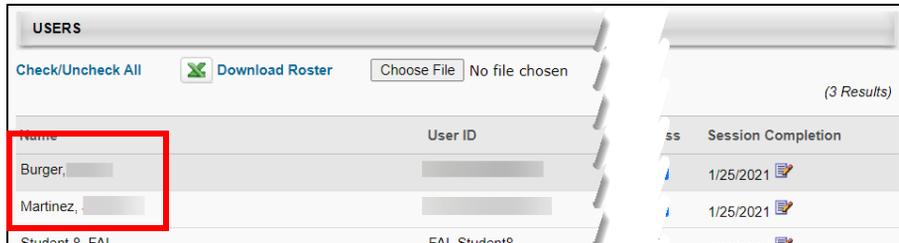
tor Organizational Unit(s)  
0 Federal Organizations (Organization)

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

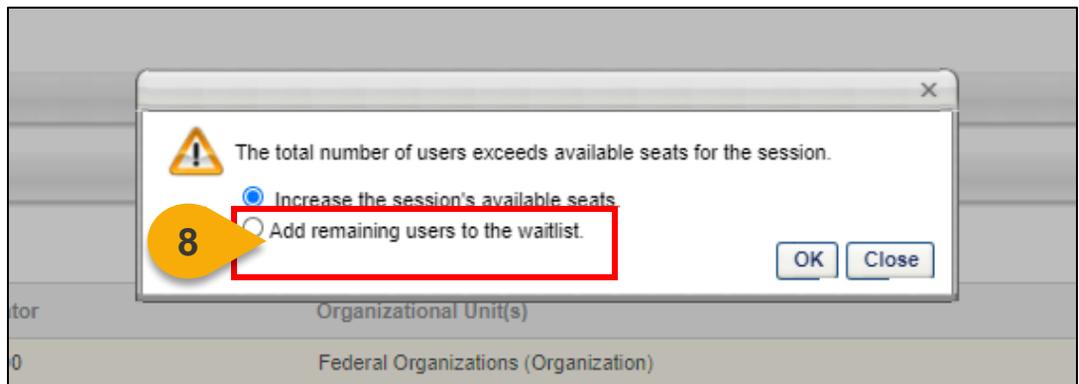
**Step 7:** After choosing your preferred option, select **OK**.



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

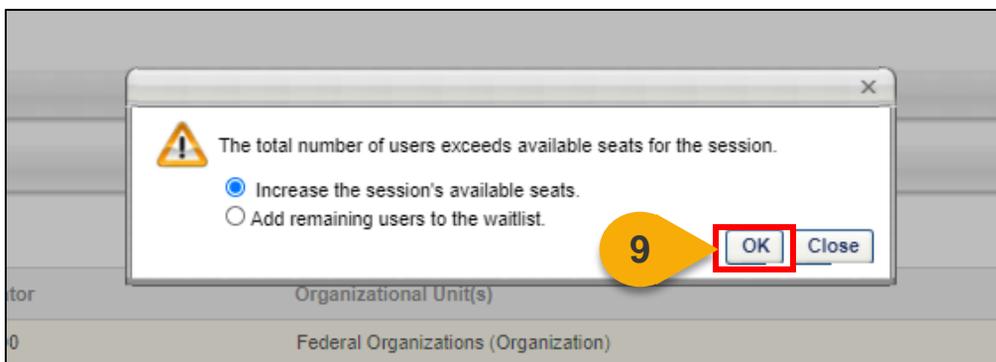


**Step 8:** If you want to add users to the waitlist, follow the same process for adding a walk in to the Roster. Then select **Add Remaining Users to the waitlist**.

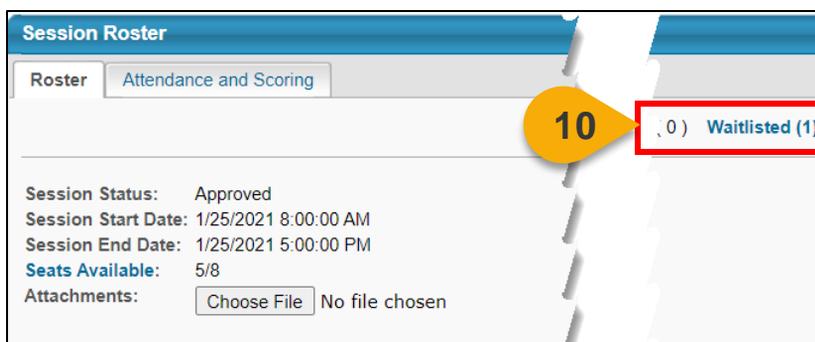


# Add Walk-Ins to Roster or Users to Waitlist (Cont.4)

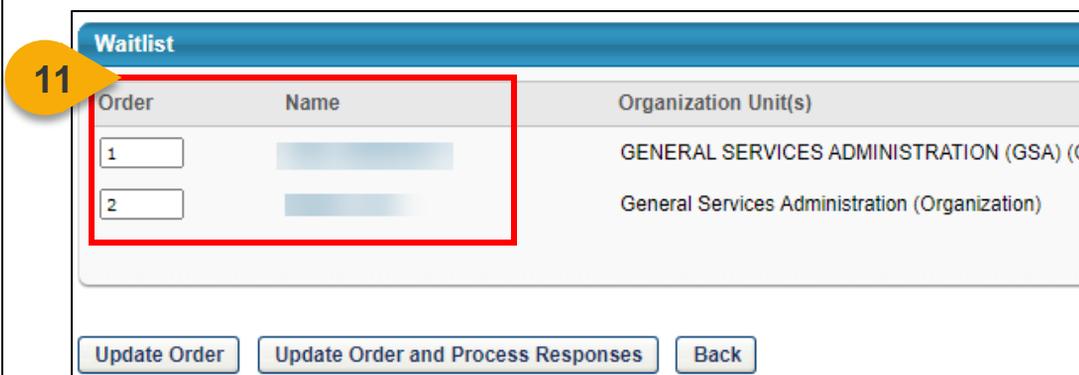
**Step 9:** Click OK.



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



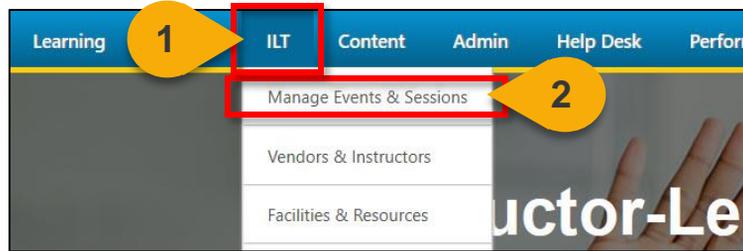
**Step 11:** The Waitlist page will show **all Users** on the Waitlist and allow for editing of student's priority order on the Waitlist.



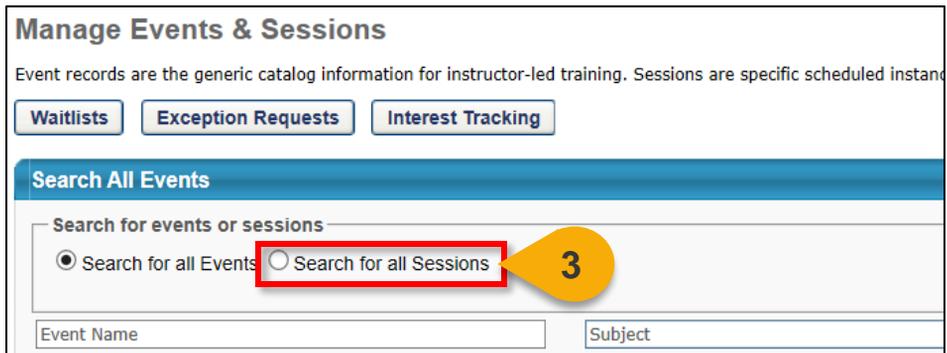
# Upload Attendance

*When you want to upload an attendance sheet to the Roster...*

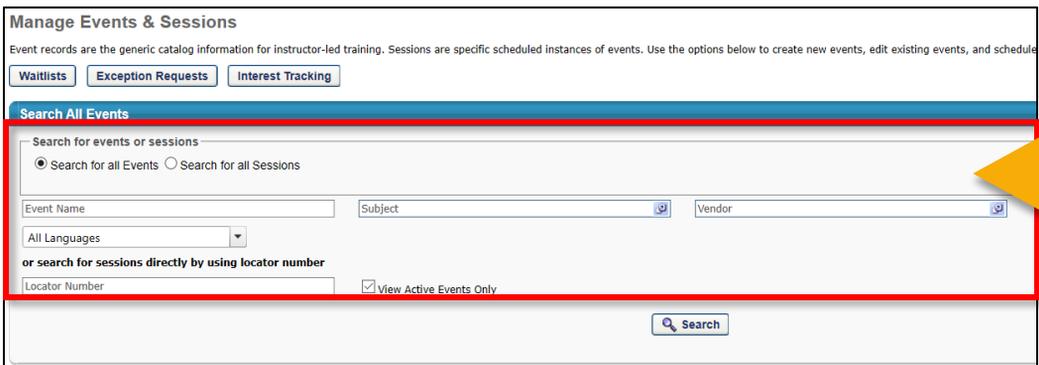
**Steps 1 & 2:** Hover over ILT, then select **Manage Events & Sessions**.



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

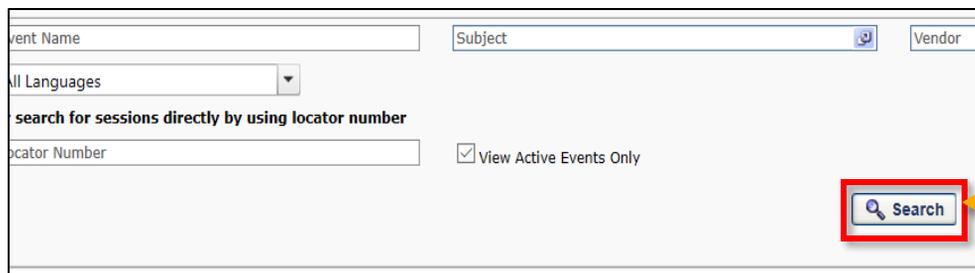


**Step 4:** Enter the search criteria for the Session.



# Upload Attendance (Cont.1)

**Step 5:** Click **Search**.



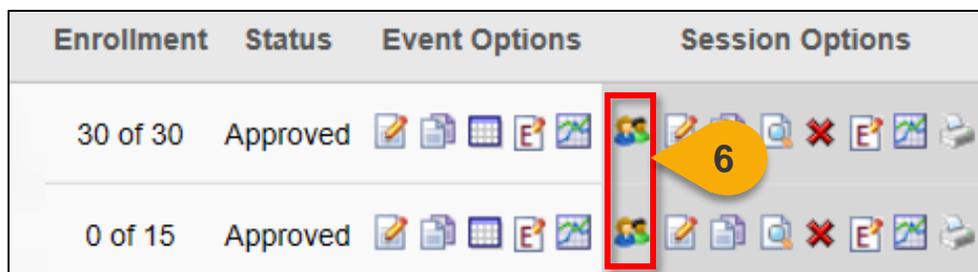
Event Name  Subject  Vendor

All Languages

search for sessions directly by using locator number

Locator Number   View Active Events Only

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



Enrollment	Status	Event Options	Session Options
30 of 30	Approved	    	      
0 of 15	Approved	    	      

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



**CON 124 (FED): Contract Execution Roster**

**Session Roster**

Roster

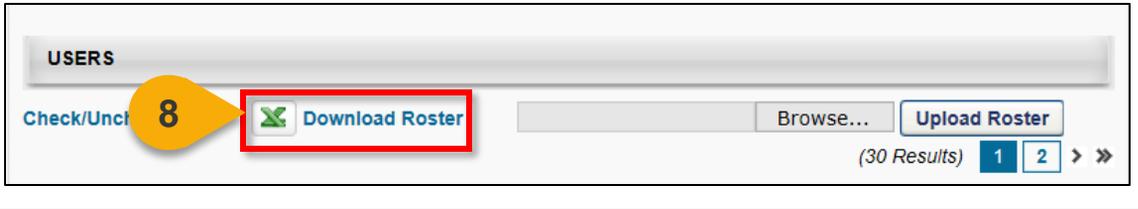
Session Status: Approved  
Session Start Date: 3/24/2021 8:00:00 AM  
Session End Date: 3/24/2021 5:00:00 PM  
Seats Available: 0/30

Attachments:



# Upload Attendance (Cont.2)

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



USERS

Check/Uncheck All **8**  Download Roster Browse... Upload Roster

(30 Results) 1 2 > >>

**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]	Score	Pass	Part1
	100	Yes	Yes
	100	Yes	Yes

**9**

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



USERS

Check/Uncheck All  Download Roster **10** Browse... Upload Roster

(30 Results) 1 2 > >>

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



USERS

Check/Uncheck All  Download Roster Browse **11** Upload Roster

(30 Results) 1 2 > >>



# Upload Attendance (Cont.3)

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

Name	User ID	Attendance	Score	Pass	Session Completion
		<input checked="" type="checkbox"/> 1	<input type="text" value="100"/>	<input checked="" type="checkbox"/>	1/28/2021
		<input checked="" type="checkbox"/> 1	<input type="text" value="100"/>	<input checked="" type="checkbox"/>	1/28/2021

**Save** 12

**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**.

corporate4proxy-stg.csod.com says

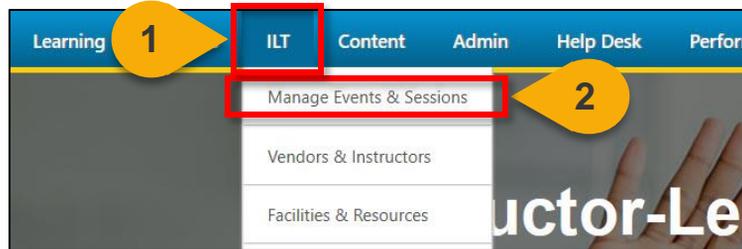
Your attendance and scoring updates are now being processed. This process takes approximately 15 minutes or less to complete. Please remember to re-submit the roster if you would like to update the students' transcript statuses to reflect attendance and scoring changes. You do not need to wait for this process to complete before re-submitting the roster.

**OK** 13

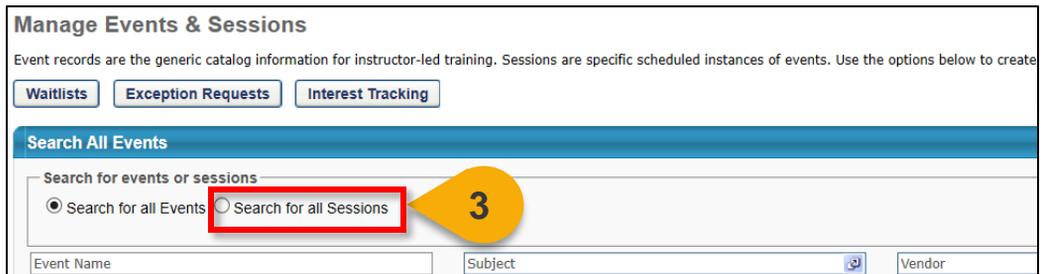
# Manually Complete Attendance

*When you want to manually update attendance in the Roster...*

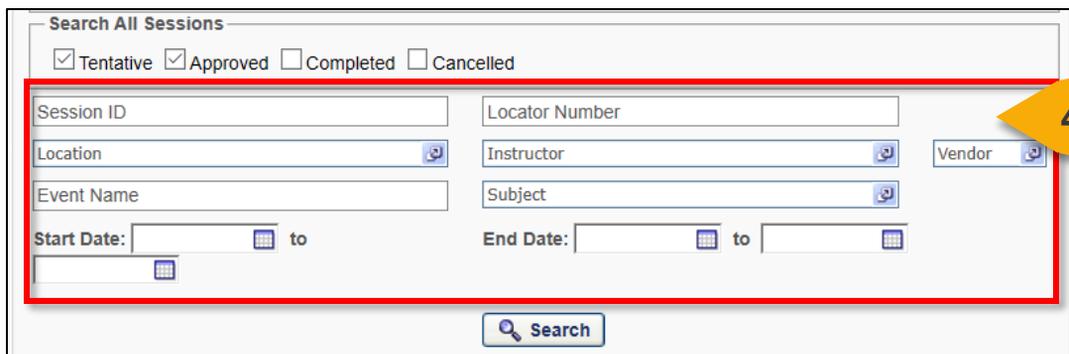
**Steps 1 & 2:** Hover over ILT, then select **Manage Events & Sessions**.



**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.

**Manage Events & Sessions**

Event records are the generic catalog information for instructor-led training. Sessions are specific scheduled instances of events. Use the options below to create new events, edit existing events, and schedule

[Waitlists](#) [Exception Requests](#) [Interest Tracking](#)

**Search All Events**

Search for events or sessions

Search for all Events  Search for all Sessions

Event Name  Subject  Vendor

All Languages

or search for sessions directly by using locator number

Locator Number   View Active Events Only

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

Enrollment	Status	Event Options	Session Options
30 of 30	Approved	    	        
0 of 15	Approved	    	        

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

**CON 124 (FED): Contract Execution Roster**

**Session Roster**

Roster [Attendance and Scoring](#)

Session Status: Approved  
Session Start Date: 3/24/2021 8:00:00 AM  
Session End Date: 3/24/2021 5:00:00 PM  
Seats Available: 0/30  
Attachments:



# Manually Complete Attendance (Cont.2)

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

**USERS**

Check/Uncheck All Download Roster Browse... Upload Roster

(30 Results) 1 2 > >>

Name	User ID	Attendance	Score	Pass	Session Completion
		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	
		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	3/24/2021
		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	3/24/2021
		<input type="checkbox"/> 1	0	<input checked="" type="checkbox"/>	3/24/2021

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

1 0  3/24/2021

1 0  3/24/2021

**Save**

**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**.

corporate4proxy-stg.csod.com says

Your attendance and scoring updates are now being processed. This process takes approximately 15 minutes or less to complete. Please remember to re-submit the roster if you would like to update the students' transcript statuses to reflect attendance and scoring changes. You do not need to wait for this process to complete before re-submitting the roster.

**OK** 10

# 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**.

The 'Manage Events & Sessions' page includes buttons for 'Waitlists', 'Exception Requests', and 'Interest Tracking'. Under 'Search All Events', there are radio buttons for 'Search for all Events' and 'Search for all Sessions'. A red box highlights the 'Search for all Sessions' option, with a yellow callout '3' pointing to it. Below are input fields for 'Event Name', 'Subject', and 'Vendor', and a 'Search' button.

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

The 'Search All Sessions' form has checkboxes for 'Tentative', 'Approved', 'Completed', and 'Cancelled'. A red box highlights the search criteria fields: 'Session ID', 'Locator Number', 'Location', 'Instructor', 'Vendor', 'Event Name', 'Subject', 'Start Date', and 'End Date'. A yellow callout '4' points to this red box. A 'Search' button is at the bottom.



# Move Users Between Sessions (Cont.1)

**Step 5:** Click **Search**.

All Languages

or search for sessions directly by using locator number

Locator Number

View Active Events Only

**5**

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

Enrollment	Status	Event Options	Session Options
30 of 30	Approved		
0 of 15	Approved		

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

SCHEDULE

USERS

Print Sign-In Sheet Email Registered Users Add Users **Withdraw / Move Users** **7**

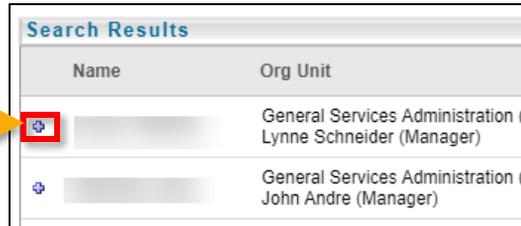
Download 'Bulk Add Users' template  No file chosen

Show V



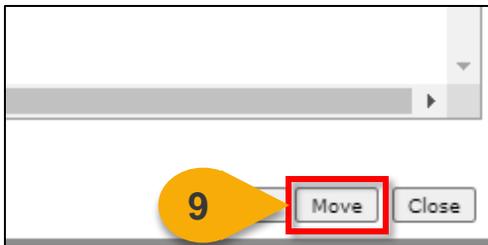
# Move Users Between Sessions (Cont.2)

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

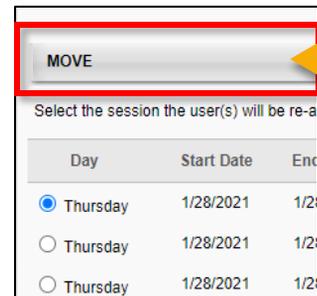


Search Results	
Name	Org Unit
<input type="checkbox"/> [Redacted]	General Services Administration (Lynne Schneider (Manager))
<input type="checkbox"/> [Redacted]	General Services Administration (John Andre (Manager))

**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.



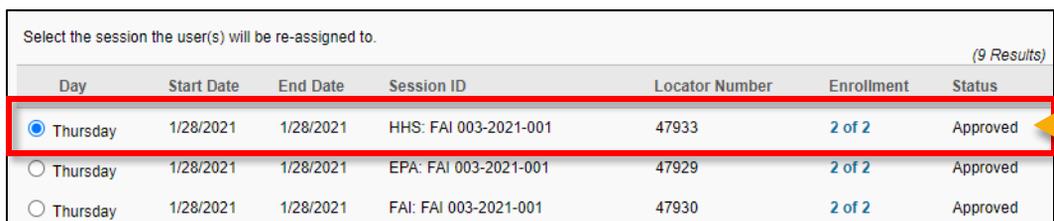
10

MOVE

Select the session the user(s) will be re-assigned to.

Day	Start Date	End Date
<input checked="" type="radio"/> Thursday	1/28/2021	1/28/2021
<input type="radio"/> Thursday	1/28/2021	1/28/2021
<input type="radio"/> Thursday	1/28/2021	1/28/2021

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

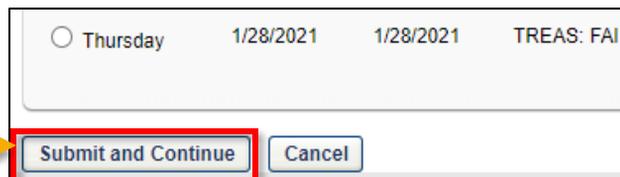


Select the session the user(s) will be re-assigned to. (9 Results)

Day	Start Date	End Date	Session ID	Locator Number	Enrollment	Status
<input checked="" type="radio"/> Thursday	1/28/2021	1/28/2021	HHS: FAI 003-2021-001	47933	2 of 2	Approved
<input type="radio"/> Thursday	1/28/2021	1/28/2021	EPA: FAI 003-2021-001	47929	2 of 2	Approved
<input type="radio"/> Thursday	1/28/2021	1/28/2021	FAI: FAI 003-2021-001	47930	2 of 2	Approved

11

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



12

Thursday 1/28/2021 1/28/2021 TREAS: FAI

Submit and Continue Cancel

# 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.

**Assign Training**

**FAI 001 - FAI Instructor Event One**

Session | Federal - Instructor-Led (ILT) | **9 Hours 0 Minutes**

Details

Start Date: 1/25/2021 (Monday) 8:00 AM EST  
End Date: 1/25/2021 (Monday) 5:00 PM EST  
Description:  
Price: \$0.00  
Credits: 8  
Enrollment: 3 of 8  
Available Languages: English (US)

**Schedule:** 1/25/2021 8:00 AM - 1/25/2021 5:00 PM

Comments

Automatically register users

13

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

Comments

Automatically register users

**Seats Available**

**USERS**

Check/Uncheck All

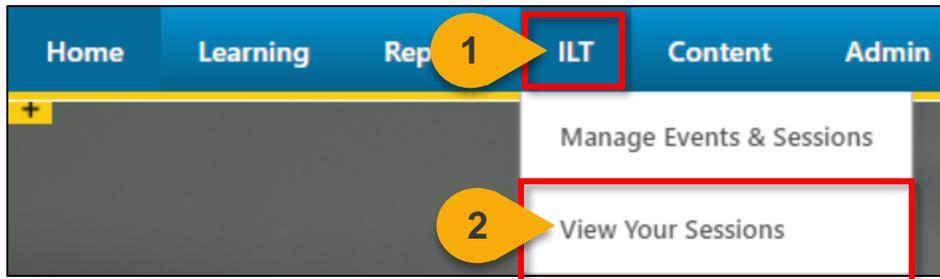
**Submit** **Cancel**

14

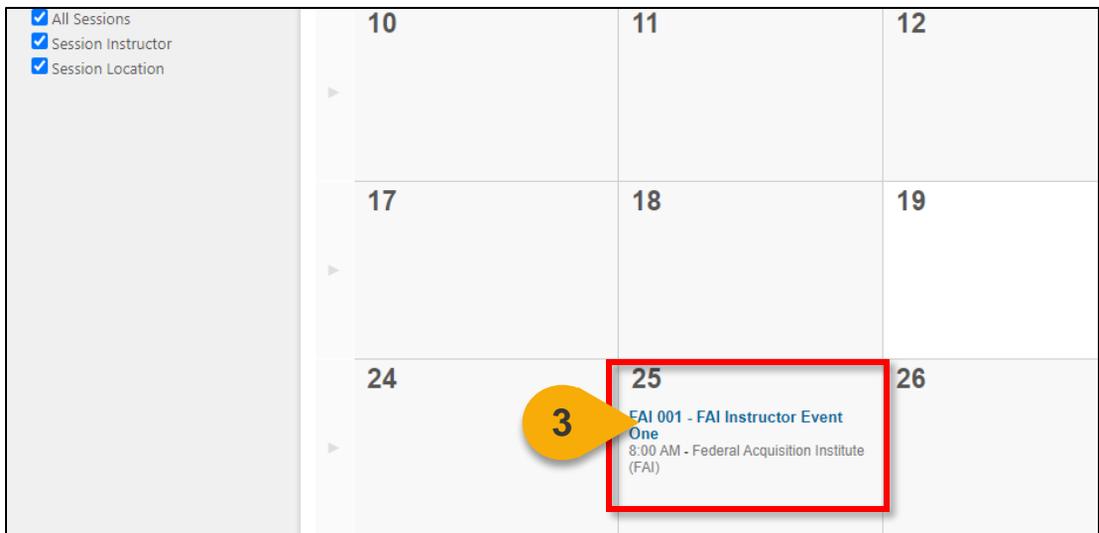
# Send Emails from Roster

*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.

PARTS / SCHEDULE

**JAN** Mon, Jan 25, 2021, 8:00 AM - 5:00 PM EST  
**25** DOJ: FAI 001-2021-01

Federal Organizations - Locations > Federal Acquisition Institute (FAI)

**4** View Roster

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

Session Roster

Roster Attendance and Scoring

Session Status: Approved  
Session Start Date: 1/25/2021 8:00:00 AM  
Session End Date: 1/25/2021 5:00:00 PM  
Seats Available: 5/7  
Attachments: Choose File No file chosen Upload

RESOURCES

Add Attachment

No attachments have been uploaded for this Session

SCHEDULE

USERS

Print Session **5** Email Registered Users Add Users Withdraw / Move Users

Download 'Bulk Add Users' template Choose File No file chosen Upload users



# Send Emails from Roster (Cont.2)

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

## Add Email

Use the fields below to create a new custom email or choose a preformatted template

Create e-mails using the fields below.  
[Click here for help.](#)

**Note:** Files uploaded through the Image or Document Manager will be stored

Action	Send Email Event
Email Title	New e-mail
From Address	
Reply-To Address	

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

## Add Email

Use the fields below to create a new custom email or choose a preformatted template

Create e-mails using the fields below.  
[Click here for help.](#)

**Note:** Files uploaded through the Image or Document Manager will be stored

Action	Send Email Event
Email Title	New e-mail
From Address	
Reply-To Address	

# Send Emails from Roster (Cont.3)

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

**Add Email**

Use the fields below to create a new custom email or choose a preformatted template

Create e-mails using the fields below.  
[Click here for help.](#)

**Note:** Files uploaded through the Image or Document Manager will be stored

<b>Action</b>	Send Email Event
<b>Email Title</b>	New e-mail
<b>From Address</b>	
<b>Reply-To Address</b>	

**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.

Tags are replaced with the corresponding values when emails are sent.

<b>Tags</b>	Display a list of tags that can be used within the subject
<b>Subject</b>	
<b>Deep Link</b>	Base URL Page URL Default Select

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

Tags are replaced with the corresponding values when emails are sent.

<b>Tags</b>	Display a list of tags that can be used within the subject
<b>Subject</b>	
<b>Deep Link</b>	Base URL Page URL Default Select

# Send Emails from Roster (Cont.4)

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

Tags are replaced with the corresponding values when emails are sent.

**Tags** Display a list of tags that can be used within the subject

**Subject**

**Deep Link** Base URL Page URL

**11** Default  Select

**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.

**Message**  HTML  Plain Text

Verdana 10pt Normal Zoom

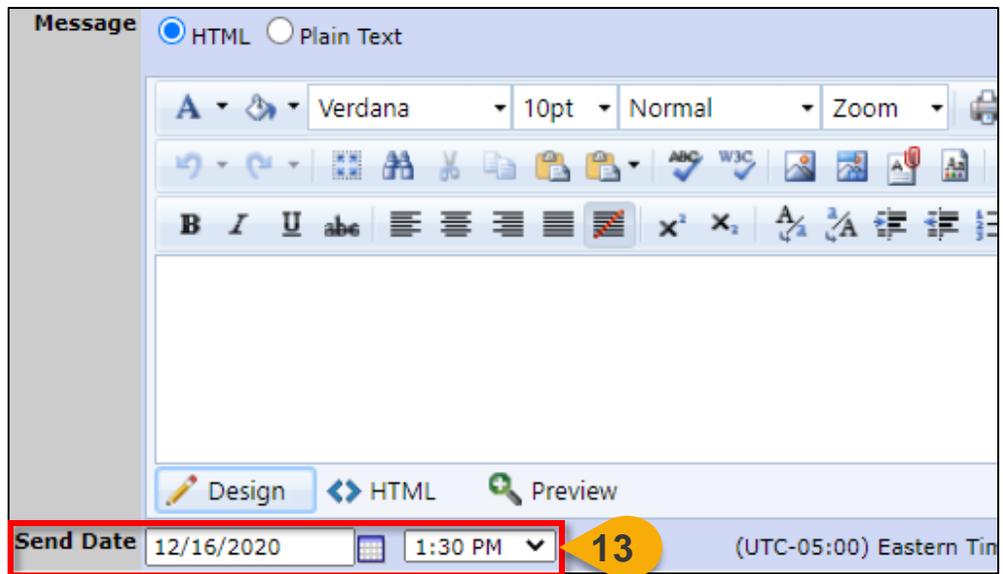
**12**

Design HTML Preview

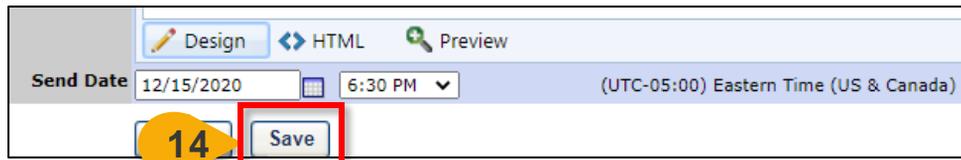
**Send Date** 12/16/2020 1:30 PM (UTC-05:00) Eastern Time

# 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



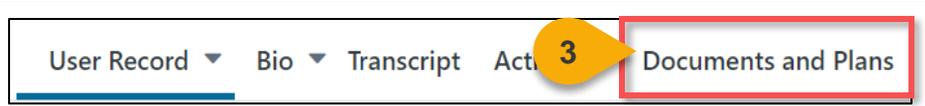
# View Submitted Forms

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

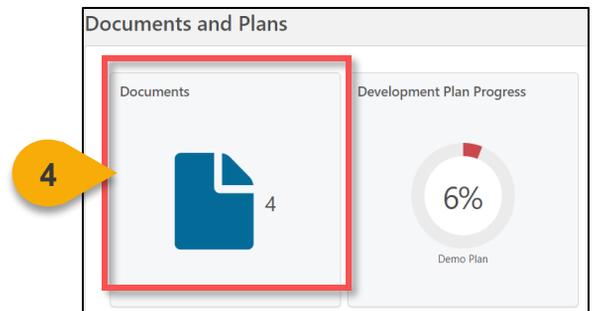
**Steps 1 & 2:** Hover over **Home** and click **Universal Profile**.



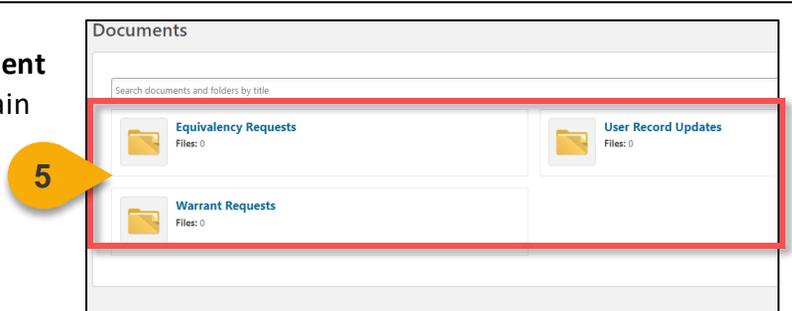
**Step 3:** Click on **Documents and Plans**.



**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.

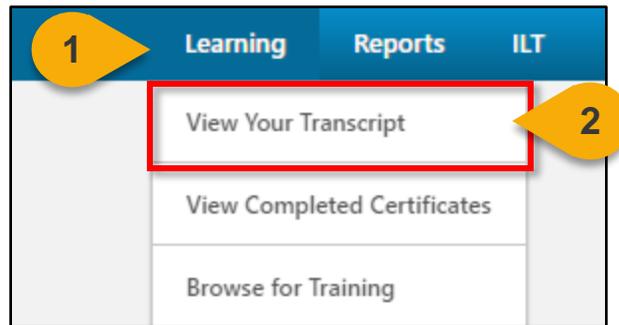
**User Record Updates:**  
Contains User Record  
Update Forms you have  
submitted.

# Request Education/Experience Verification

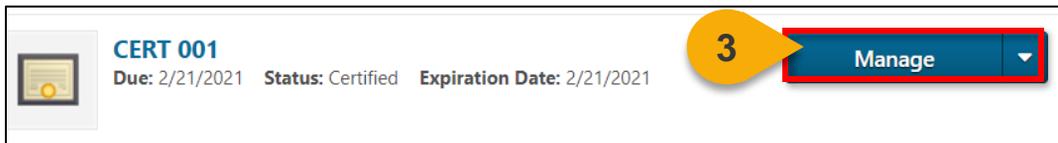
*When you need to submit an Education or Experience Verification Checklist for a Certification...*

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

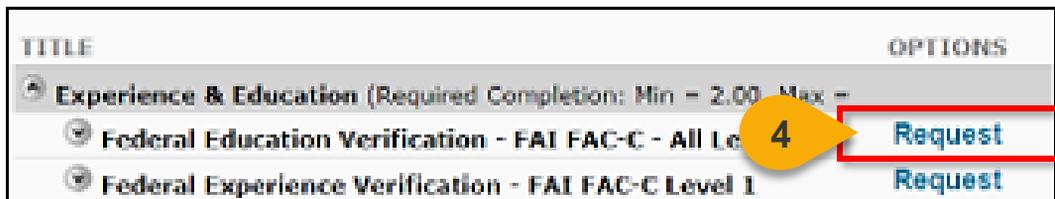
**Steps 1 & 2: Hover over the Learning tab and click View Your Transcript.**



**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.

**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

Federal Experience Verificatio...

Federal Experience Verificatio...

« Back

Checklist Summary

Overall 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%

# 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...

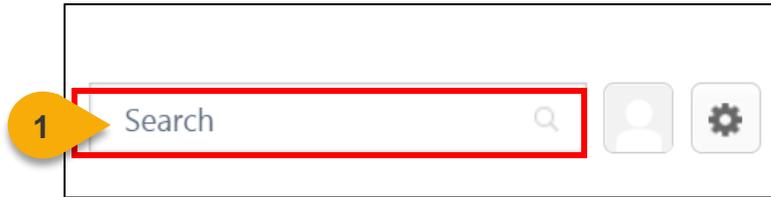
**13** Save Cancel

# Submit an Equivalency/Fulfillment Form

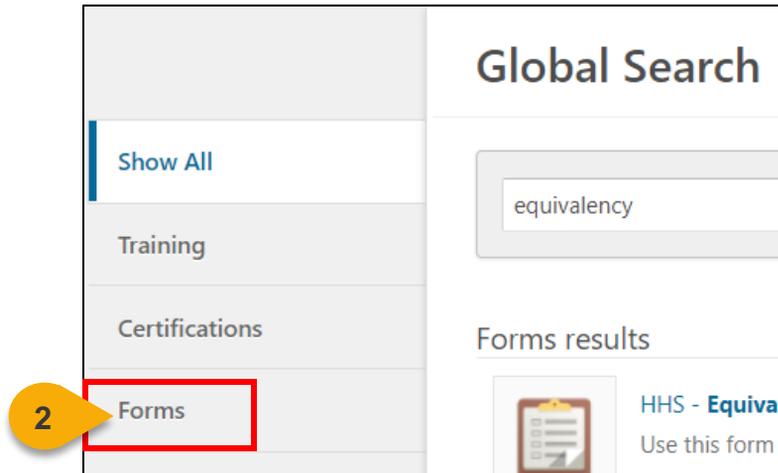
*When you want to request Equivalency or Fulfillment for a Course...*

Use Global Search to find the Equivalency/Fulfillment form.

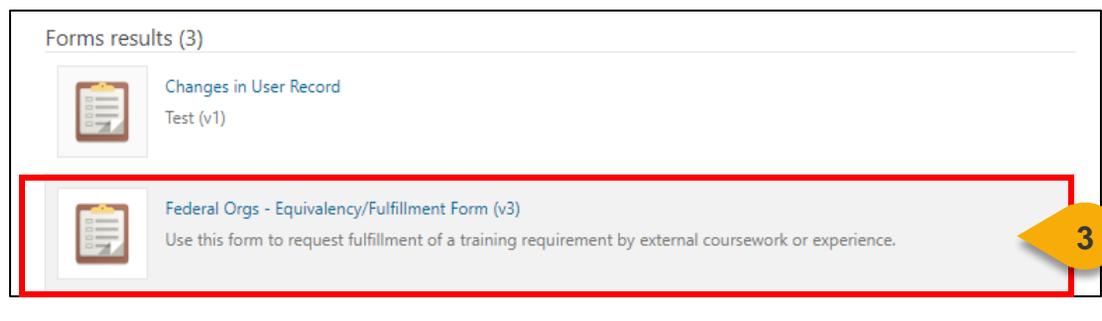
**Step 1:** Enter **Equivalency** in the Search box and click the Magnifying Glass.



**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**

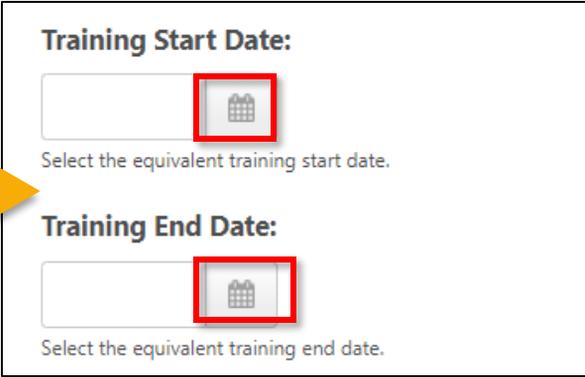
Select 

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

**6**

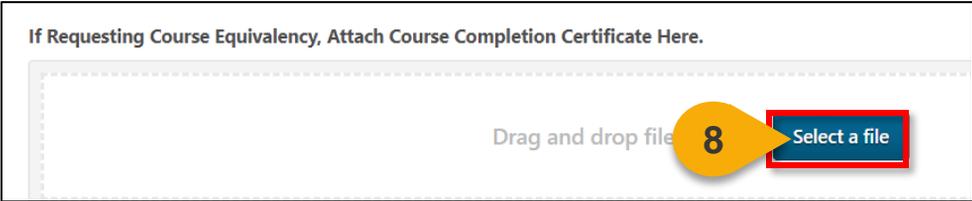
# Submit an Equivalency/Fulfillment Form (Cont.2)

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



The screenshot shows two date selection fields. The first is labeled "Training Start Date:" and the second is labeled "Training End Date:". Each field consists of a text input box and a calendar icon to its right. Red boxes highlight the calendar icons. A yellow callout bubble with the number "7" points to the first calendar icon. Below each input box is the text "Select the equivalent training [start/end] date."

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



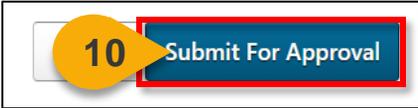
The screenshot shows a file upload area with a dashed border. Above the area is the text "If Requesting Course Equivalency, Attach Course Completion Certificate Here." Below the area is the text "Drag and drop file". A yellow callout bubble with the number "8" points to a blue button labeled "Select a file" which is highlighted with a red box.

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



The screenshot shows a text input field labeled "Employee Remarks:". The field is highlighted with a red border. A yellow callout bubble with the number "9" points to the field. Below the field is the text "2000 characters maximum." At the bottom right of the field are two buttons: "Cancel" and "Submit For Approval".

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



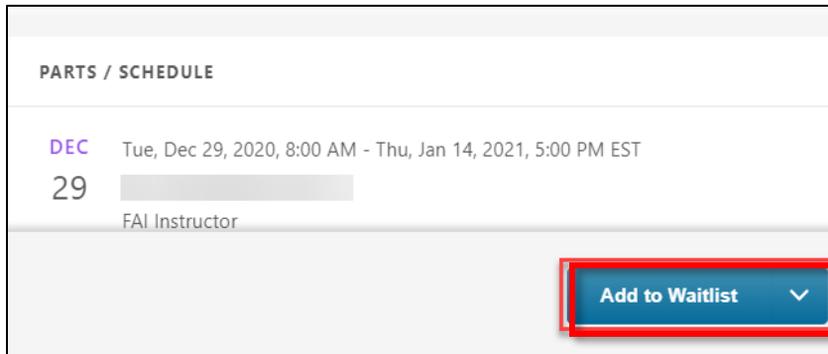
The screenshot shows a blue button labeled "Submit For Approval" highlighted with a red box. A yellow callout bubble with the number "10" points to the button.

# Submit an Exception Request

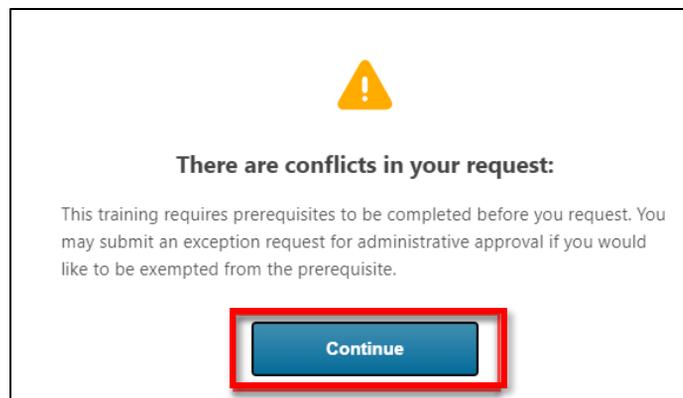
When you want to submit an Exception Request for a course prerequisite...

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.**



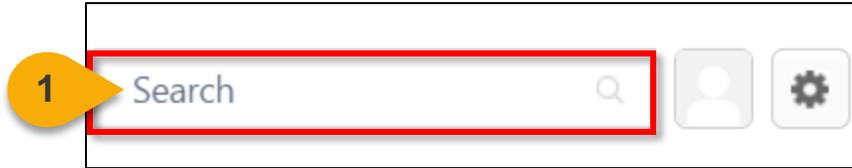
# Certifications



# Request and Manage a Certification

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

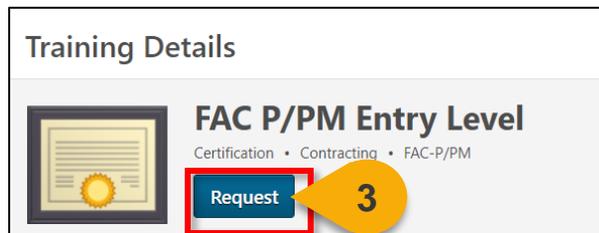
**Step 1:** In Global Search, type in the Certification you wish to request and click the Magnifying Glass.



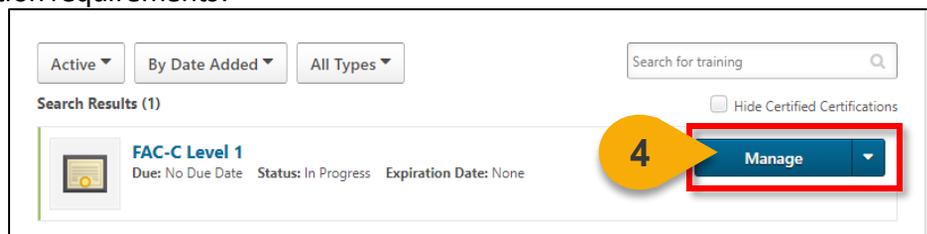
**Step 2:** Click on the **Certification** you'd like in the results.



**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**.

The screenshot shows a 'Certification Details' page. On the left, there is a list of details: Title: CLA - Program and Project Management; Description: The Federal Acquisition Certification (P/PMs) are critical to project success. They are essential functional and technical management professionals. They...; Family: Contracting; Category: FAC-COR. On the right, there is a 'Progress Report' button highlighted with a red box. A yellow callout bubble with the number '6' points to this button.

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

The screenshot shows a 'Progress Report' popup window. At the top, it says 'Progress Report' and 'View Period' is set to 'FY 2021-2023'. Below this, it shows 'Required: 80.00 CLP' and 'Earned: 0.00 CLP'. A table follows with the following data:

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

A 'Close' button is located at the bottom right of the window.

# Individual Development Plans



# Create an IDP

When you want to create an IDP...

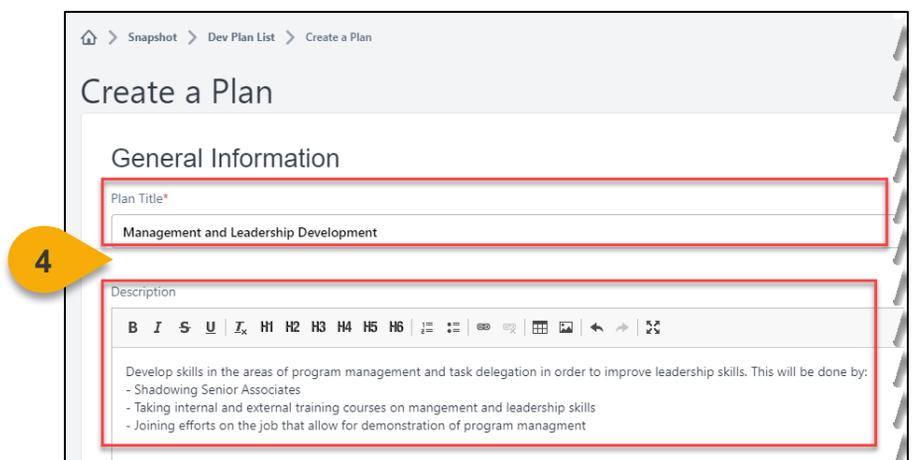
**Steps 1 & 2:** Hover over **Performance** and click on **Development Plans**.



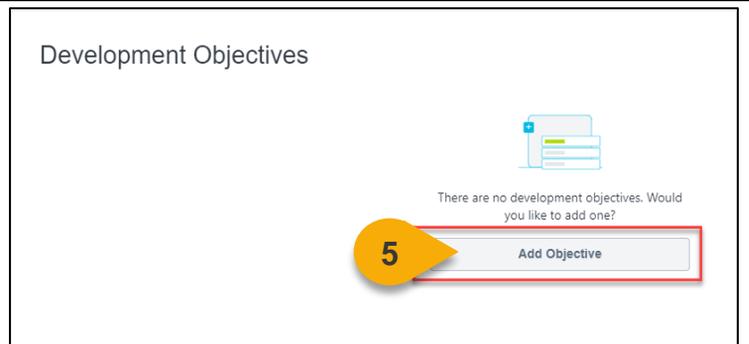
**Step 3:** Click on the **Create New Plan** button.



**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.**

## 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.

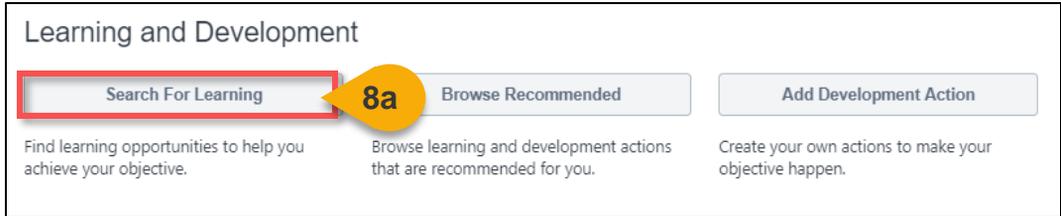
**Search for Learning:**  
Encompasses training sessions provided. It allows you to select online sessions.

**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**.

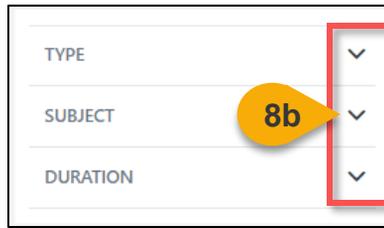


Learning and Development

**Search For Learning** **8a** 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.



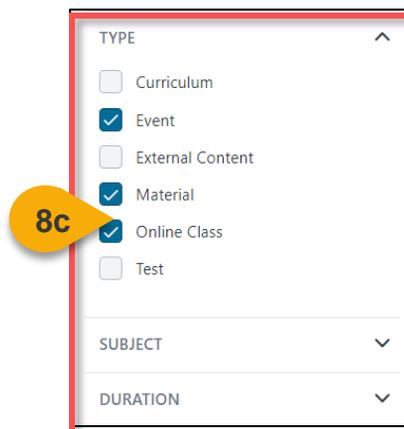
TYPE

SUBJECT **8b**

DURATION

**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 **8c**

External Content

Material

Online Class

Test

SUBJECT

DURATION

# Create an IDP (Cont. 3)

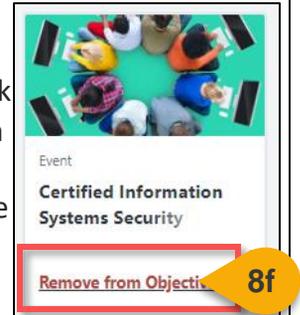
**Step 8d:** You may also search for a specific training course using the **Search bar**.



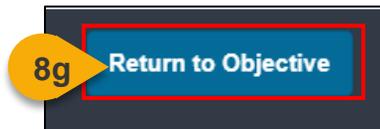
**Step 8e:** Select the **Add to Objective** link beneath any training you want to add. Multiple training courses can be selected.



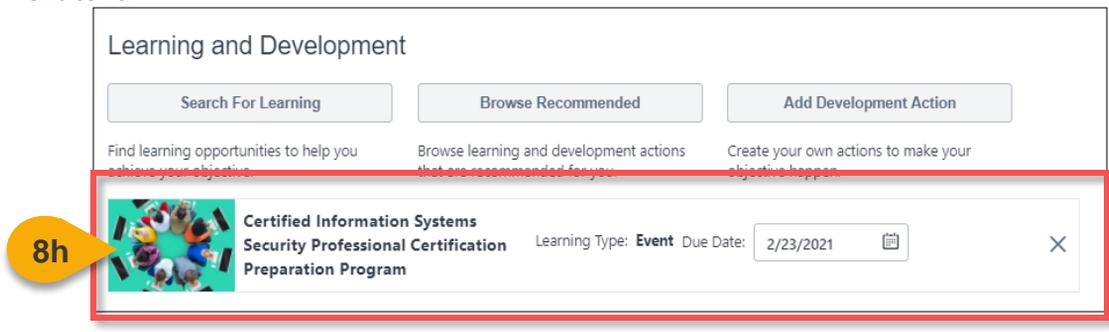
**Step 8f:** If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.



**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** 

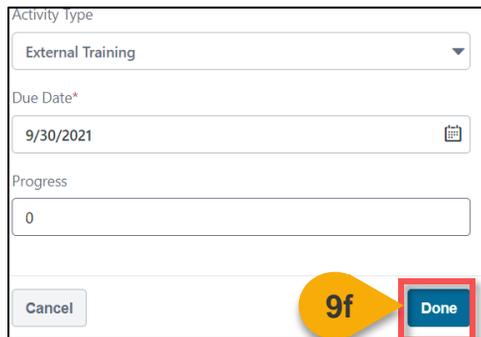
# Create an IDP (Cont. 5)

**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**.

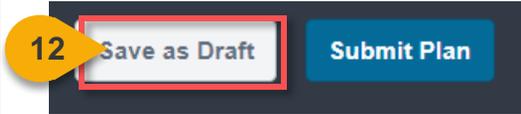
11

Designate this as the Primary Plan for assignees

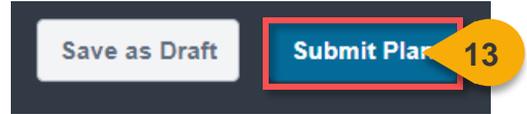
# Create an IDP (Cont. 6)

---

**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.

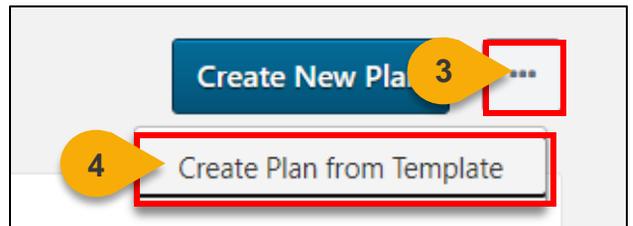
# Create an IDP from a Template

*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>

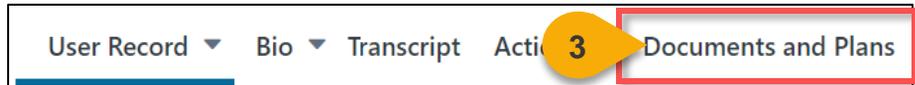
# Update IDP

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

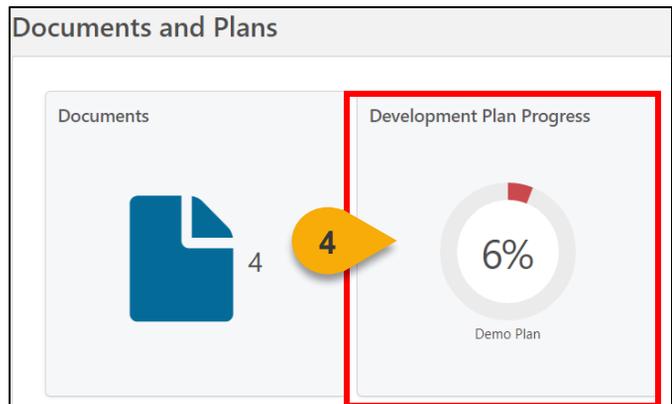
**Steps 1 & 2:** Hover over **Home** then navigate to **Universal Profile**.



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



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

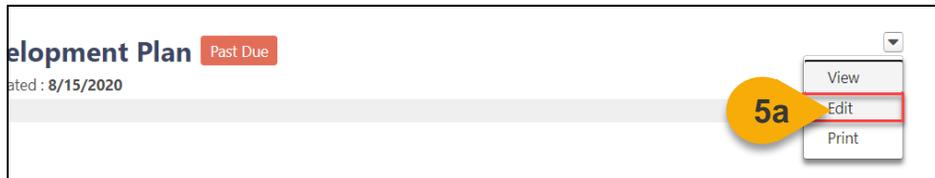


**Note:** You can also navigate to the IDP using the Performance tab and then clicking on Development Plans.

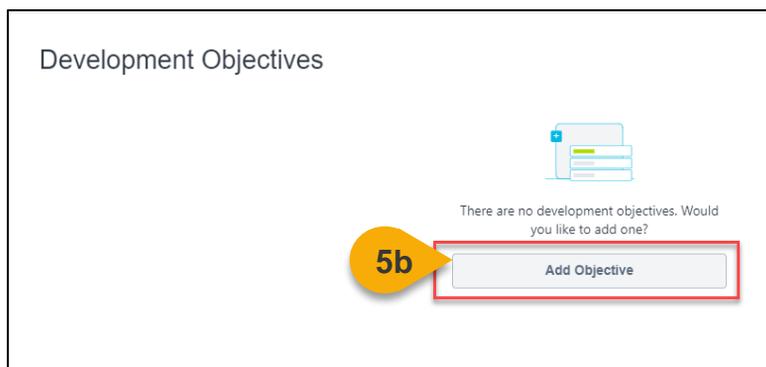
# Update IDP (Cont. 1)

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

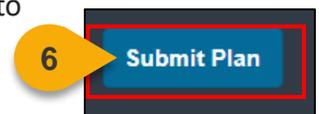
**Step 5a:** Select the dropdown icon **Edit** option next to the IDP to which you want to add a new Objective.



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



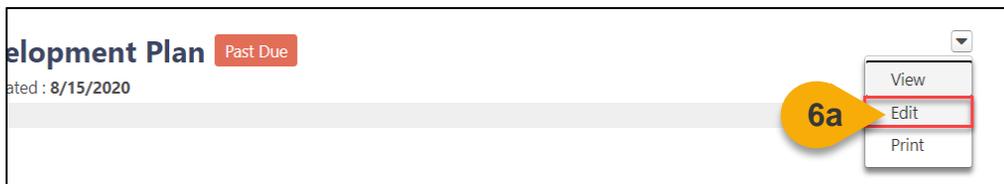
**Step 6:** Click on the **Submit Plan** button when you are ready to resubmit your plan for approval.



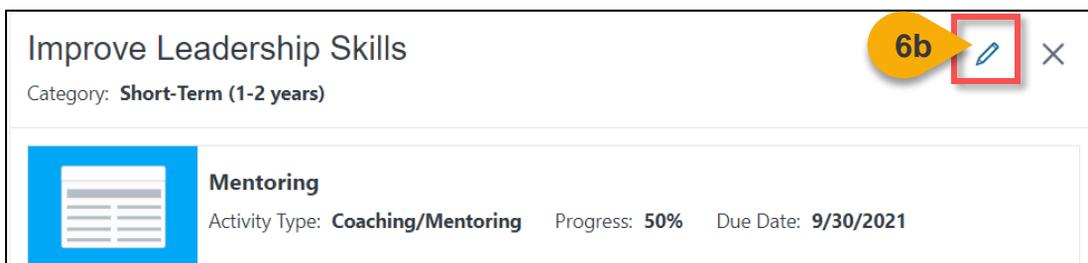
# Update IDP (Cont. 2)

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.

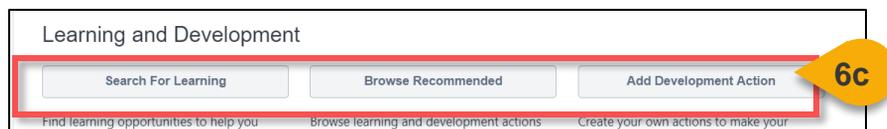
**Step 6a:** Select the dropdown icon **Edit** option next to the plan with the Objective you want to update.



**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

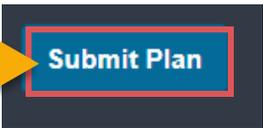
Find learning opportunities to help you achieve your objective.    Browse learning and development actions that are recommended for you.    Create your own actions to make your objective happen.

 **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** 

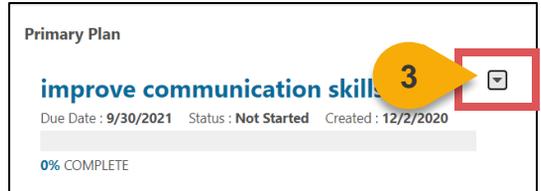
# Cancel IDP

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

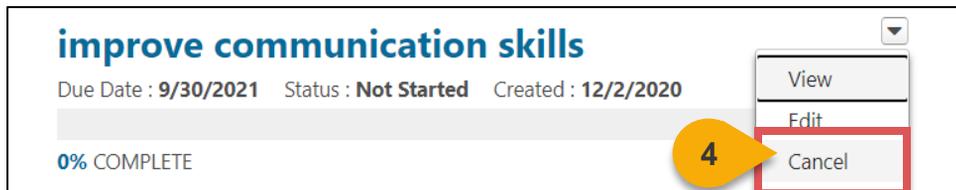
**Steps 1 & 2:** Hover over the **Performance** tab and then click **Development Plans**.



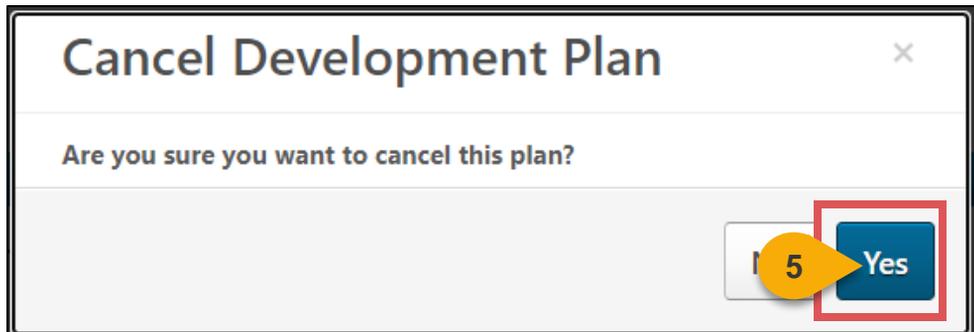
**Step 3:** Click the **dropdown arrow** next to the plan you would like to cancel.



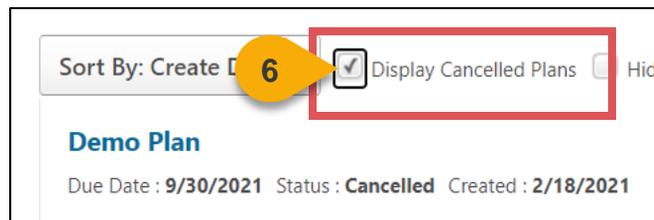
**Step 4:** Select **Cancel** from the dropdown menu.



**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.



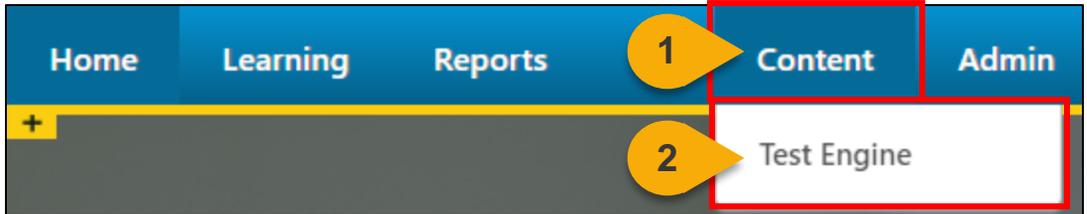


# Test Engine

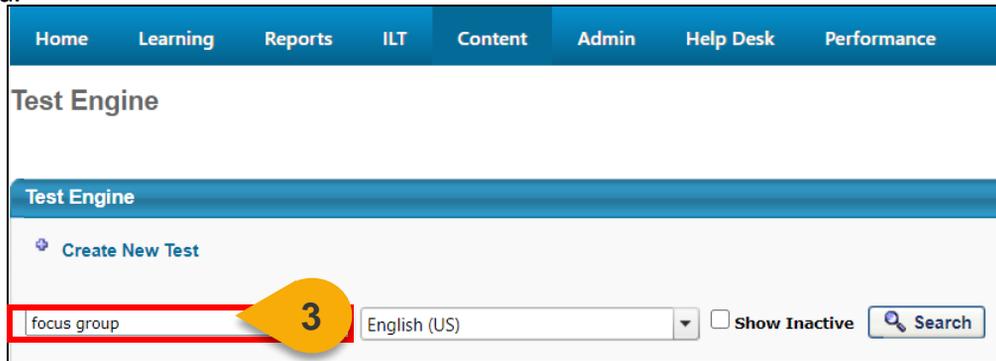
# View User's Exam Results

*When you want to view exam results...*

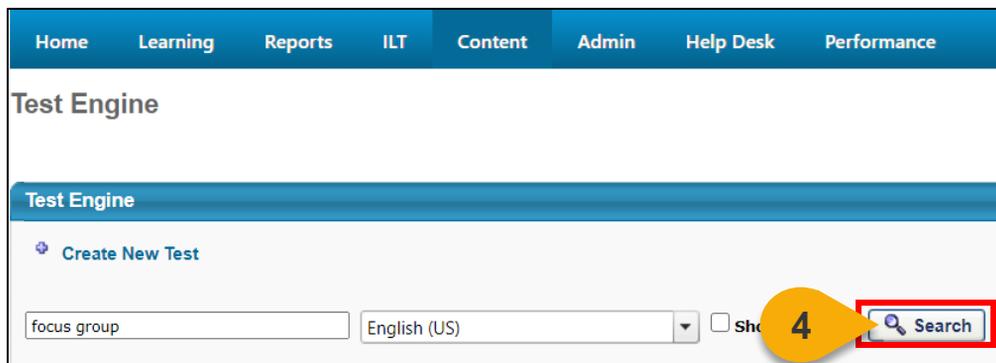
**Steps 1 & 2:** Navigate to the **Content** tab and click on **Test Engine**.



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

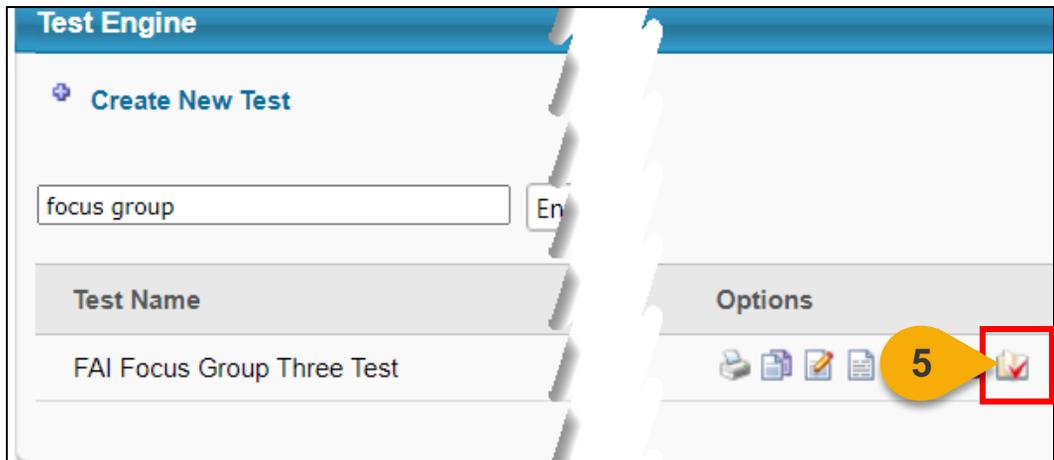


**Step 4:** Click the **Search** button or hit enter.



# 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.

The screenshot shows the 'Review Tests' interface. At the top, there is a blue header with the text 'FAI Focus Group Three Test'. Below the header, there is a search bar labeled 'Search for Users:' with a search button. Below the search bar, there is a table with the following columns: 'USER', 'Score', 'PASSED', and 'Options'. The table contains three rows of user data. A red box highlights the table, and a yellow callout bubble with the number '6' points to the 'Options' column.

USER	Score	PASSED	Options
Andre, [redacted]	100	Yes	[icon] [icon]
Fields, [redacted]	100	Yes	[icon] [icon]
Kinjerski, [redacted]	100	Yes	[icon] [icon]

- **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.

**Review Tests**

**FAI Focus Group Three Test**

Search for Users:

USER	Score	PASSED	Options
Andre, <input type="text"/>	100	Yes	  
Fields, <input type="text"/>	100	Yes	  
Kinjerski, <input type="text"/>	100	Yes	  

**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.

**Review Test Questions**

View:  All Questions  Correct Questions  Incorrect Questions  Show Details

ID	Question	Correct
175488	The Great Wall of China is longer than the distance between London and Beijing	Correct
175489	K is worth four points in Scrabble	Correct
175490	Coffee is made from berries	Correct

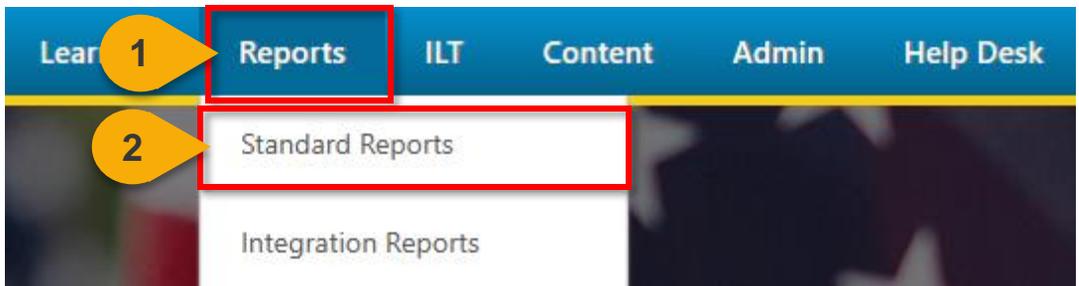
# Reports



# View Standard Reports

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

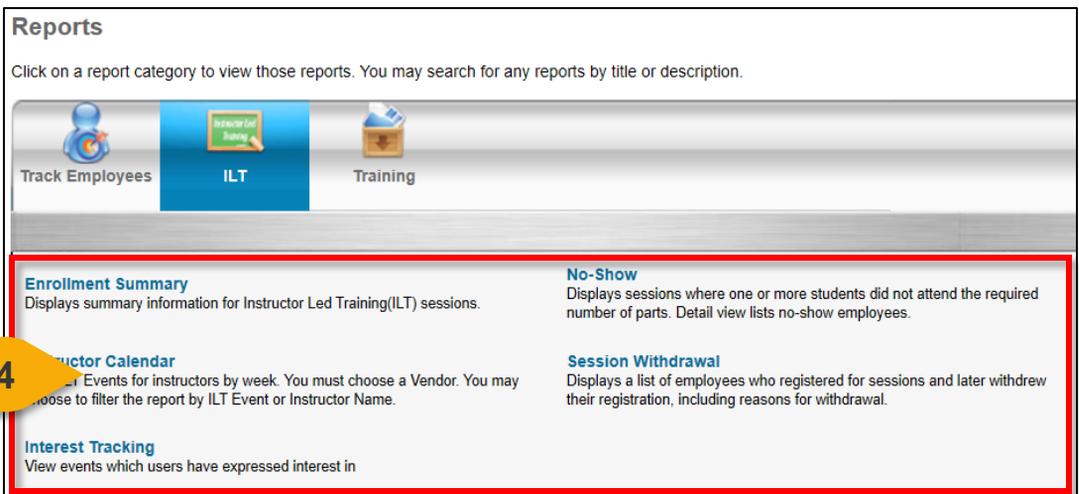
**Steps 1 & 2:** Hover over the **Reports** tab and then click **Standard Reports**.



**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**

6 Facility :

Vendor : All

Instructor :  (Please Select Vendor First)

Event :

Locator Number :

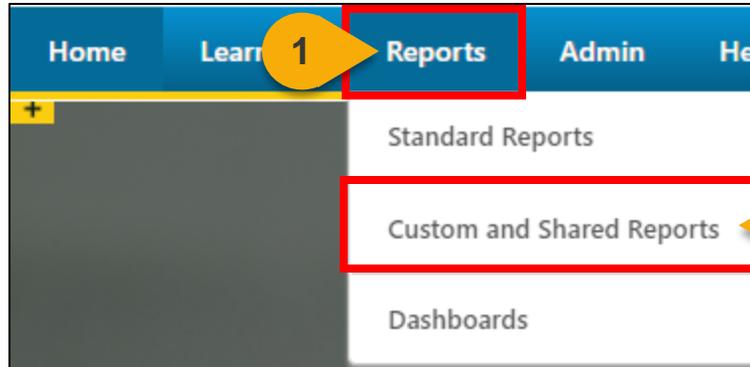
Printable Version Export to Excel Export to Text

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

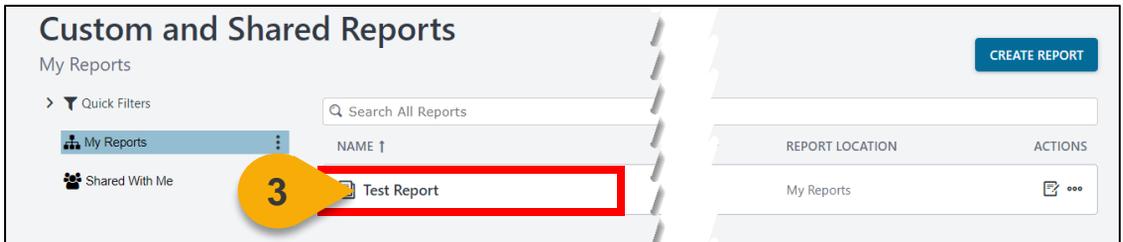
# View Custom Reports

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

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

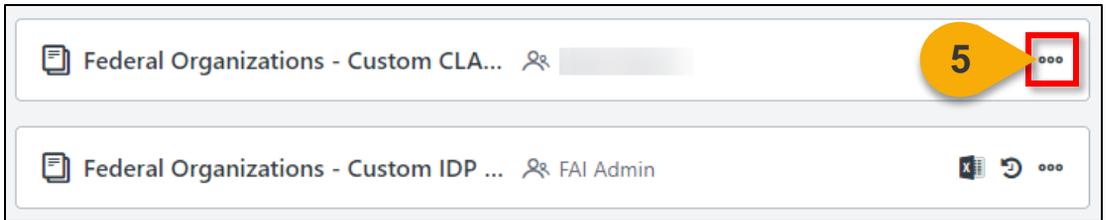


**Step 3:** You will arrive at the Custom and Shared Reports page. Here you will see all custom reports that you have created. Click on the **title** of the report to view it.

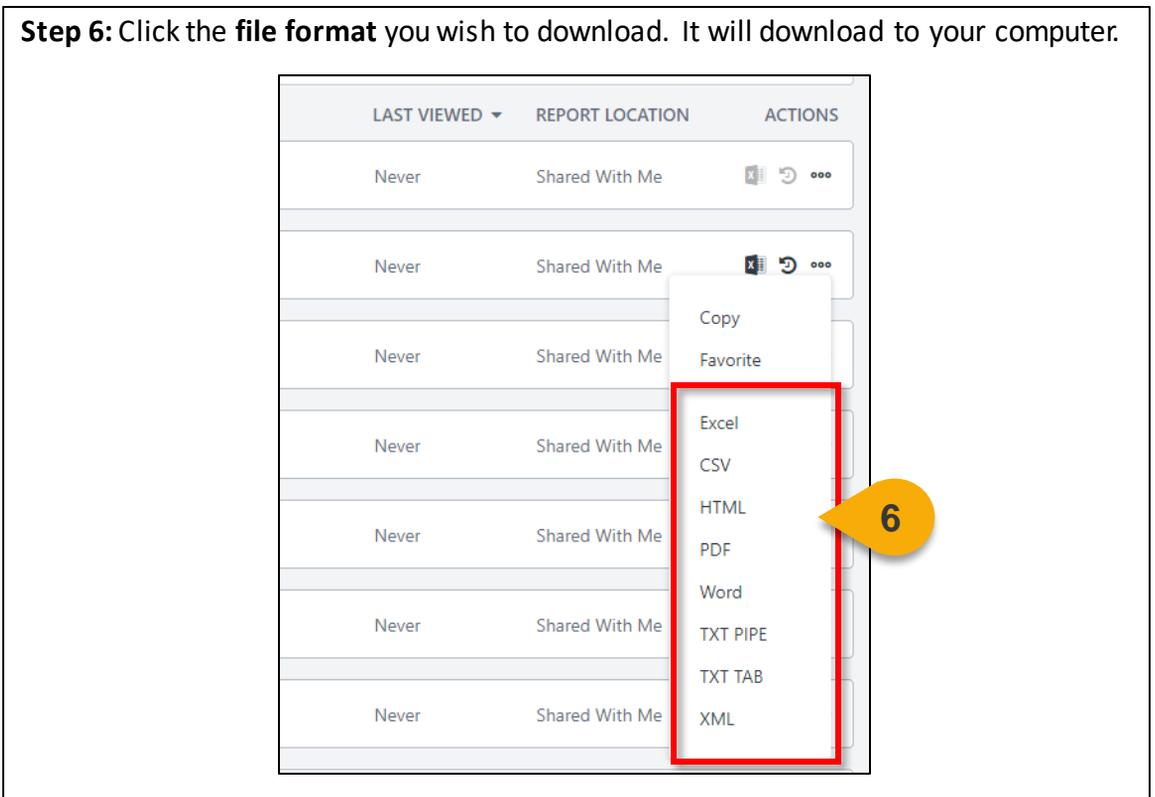


# View Custom Reports (Cont.1)

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



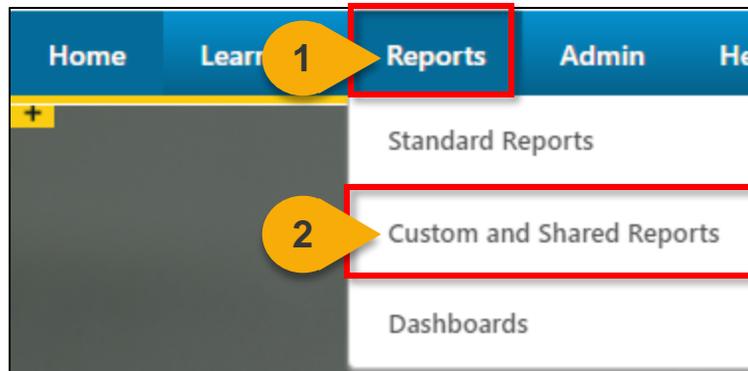
**Step 6:** Click the **file format** you wish to download. It will download to your computer.



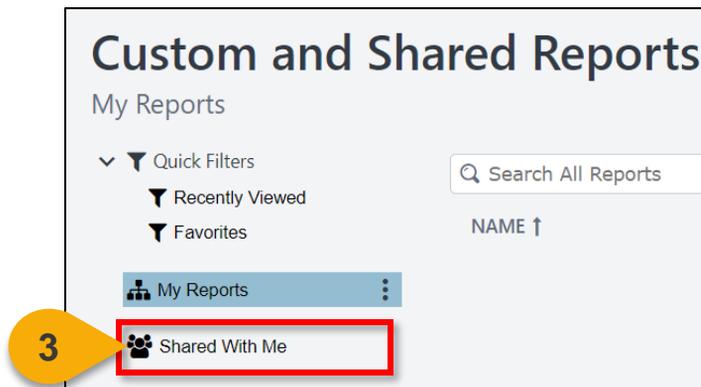
# Filter and Download Custom Reports

*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.

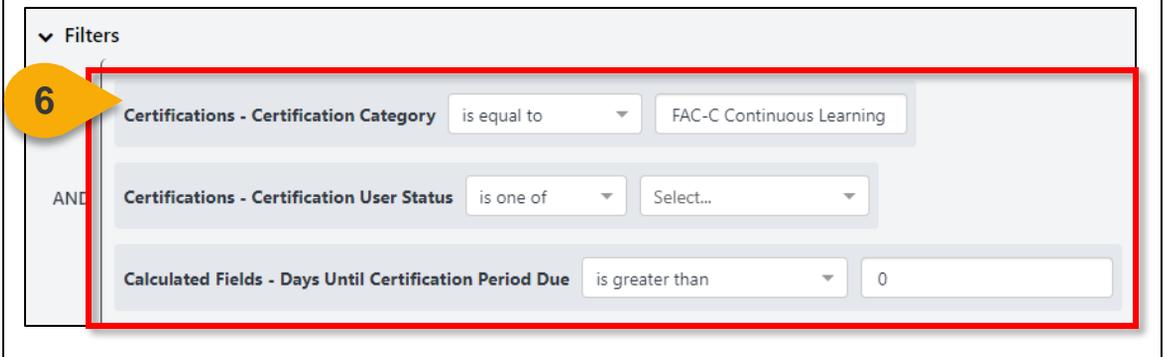


**Step 4:** Click the **Report Name** you want to view to update the report filters.

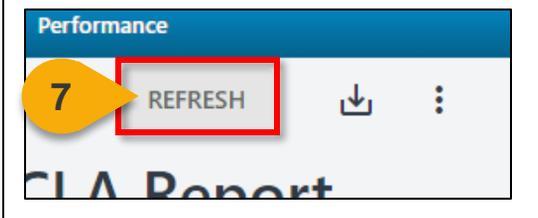


# Filter and Download Custom Reports (Cont. 1)

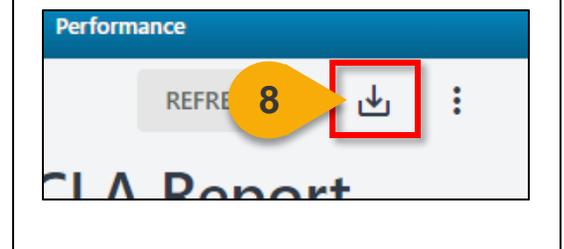
**Step 5:** Update the **filters** as needed. The filters will vary based on the report.



**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.

