FEDERAL ACQUISITION INSTITUTE

Registrar and Student Services Task Aid

Task Aid Titles

- Log On
- Forgot Password
- Request and Account Using the SAAR Form
- View User Record
- Edit User Record
- Edit User Record via Advanced Forms
- View User Transcript
- View Transcript Status
- Use Global Search
- Register for Instructor-Led Training
- Assign ILTs
- View ILTs in Catalog
- Indicate Interest in a Future Session
- Withdraw from an ILT
- View Instructors for Your Schoolhouse
- Add CSOD User as an Instructor
- Add an External Instructor
- View Facilities for Your Schoolhouse
- Add Facilities for Your Schoolhouse
- Register for Online Training (OLT)
- Assign OLTs
- Submit an Exception Request
- Approve Training Requests
- Create Event
- Edit Event
- Create Sessions
- Edit Sessions
- Cancel Sessions
- View Roster
- Manage Roster
- Update Roster via Upload
- Manually Add Walk-Ins to Roster or Users to Waitlist
- Upload Attendance
- Manually Complete Attendance
- Move Users Between Sessions
- Send Emails from Roster
- Request External Training Credit Within a Certification
- Request External Training Credit from Transcript
- Add External Training from the Transcript to a Certification
- Request and Manage a Certification
- Assign Certifications
- View Submitted Forms
- Request Education/Experience Verification
- Submit an Equivalency/Fulfillment Form
- Approve or Deny Exception Requests

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

https://www.fai.gov/

FAI@mail.mil

Table of Contents

User Account Management	Page #
Log On	p.6
Forgot Password	p.8
Request an Account Using a SAAR Form	p.12
View User Record	p.15
Edit User Record	p.16
Edit User Record via Advanced Form	p.21
View Transcript	p.23
View Transcript Status	p.24
Use Global Search	p.25
Instructor Led Training	
View ILTs in Catalog	p.27
Assign ILTs	p.29
Register for Instructor Led Training (ILTs)	p.33
Indicate Interest in a Future Session	p.34
Withdraw from an ILT	p.36
View Instructors for Your Schoolhouse	p.37
Add CSOD User as an Instructor	p.38
Add an External Instructor	p.42
View Facilities for Your Schoolhouse	p.46
Add Facilities for Your Schoolhouse	p.48
Online Training	
View Online Training in Catalog	p.55
Assign OLTs	p.57
Register for Online Training (OLT)	p.60
Submit an Exception Request	p.61
Approve Training Requests	p.62

Table of Contents (Cont. 1)

Sessions and Rosters	Page #
Create Event	p.64
Edit Event	p.73
Create Sessions	p.78
Edit Sessions	p.90
Cancel Sessions	p.93
View Roster	p.96
Manage Roster	p.98
Update Roster via Upload	p.101
Manually Add Walk-Ins to Roster or Users to Waitlist	p.104
Upload Attendance	p.109
Manually Complete Attendance	p.113
Move Users Between Sessions	p.116
Send Emails from Roster	p.120
External Training	
Request External Training Credit from Transcript	p.127
Request External Training Credit Within a Certification	p.129
Add External Training from the Transcript to a Certification	p.134
Certifications	
Request and Manager a Certification	p.138
Assign Certifications	p.140
Checklists and Forms	
View Submitted Forms	p.143
Request Education/Experience Verification	p.144
Submit an Equivalency/Fulfillment Form	p.148
Approve or Deny Exception Requests	p.151

Table of Contents (Cont.2)

Individual Development Plans	Page #
Create an IDP	p.155
Create an IDP from a Template	p.161
Update IDP	p.162
Cancel IDP	p.166
Reports	
View Standard Reports	p.168
View Custom Reports	p.170
Filer and Download Reports	p.172

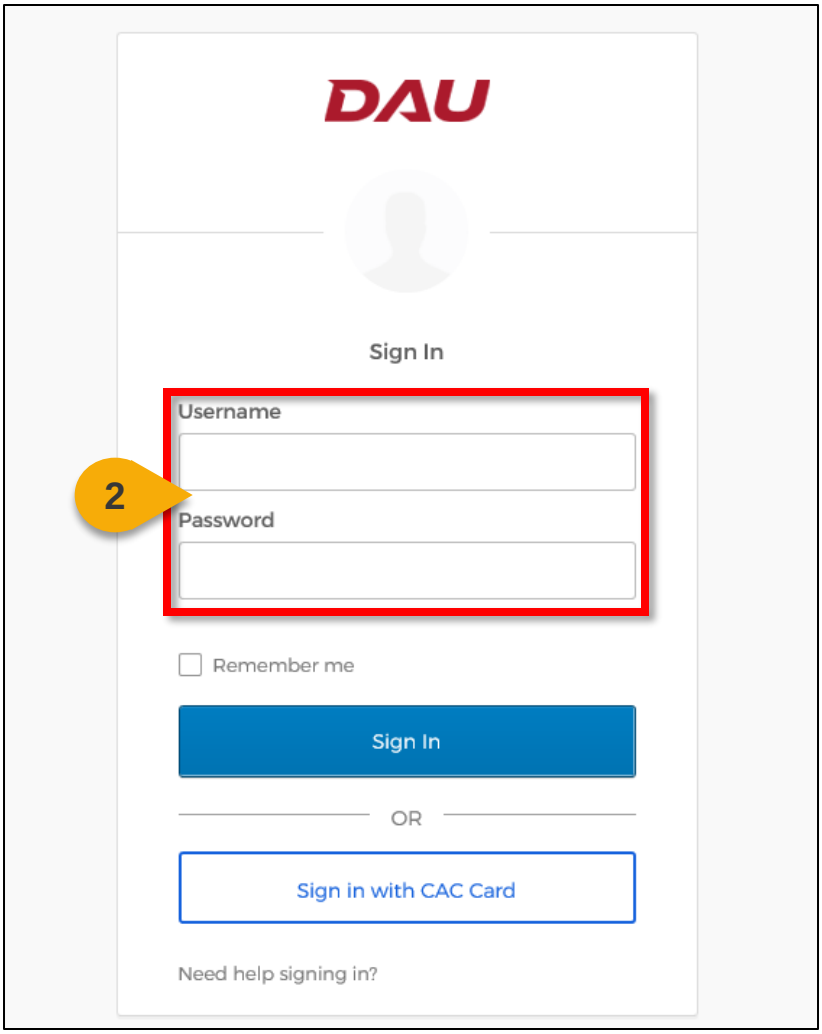
User Account Management

Log On

When you want to login…

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

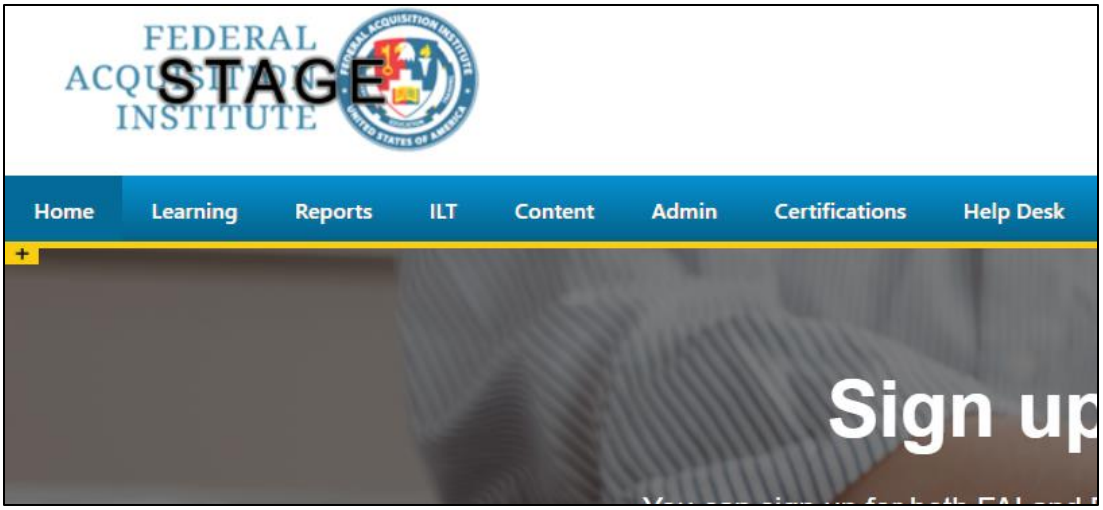
Step 2: The log on window will pop up. Enter your **Username** (your email) and **Password** in their respective fields.



Log On (Cont.1)

Step 3: Click **Sign In.**

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



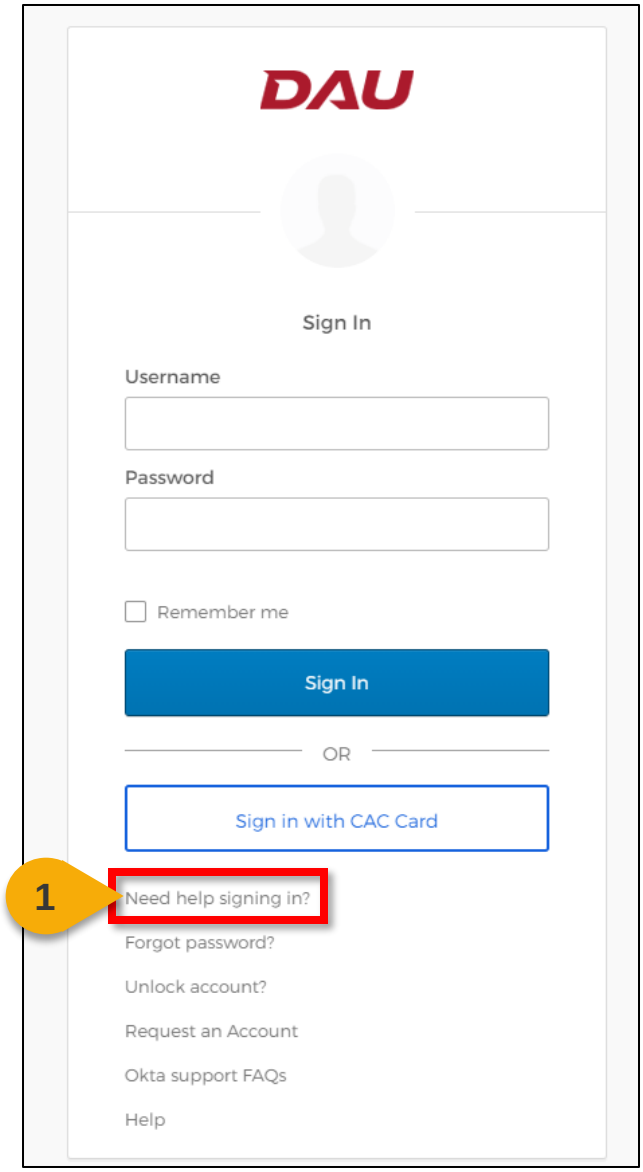
NOTE: If you receive an error message:

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

Forgot Password

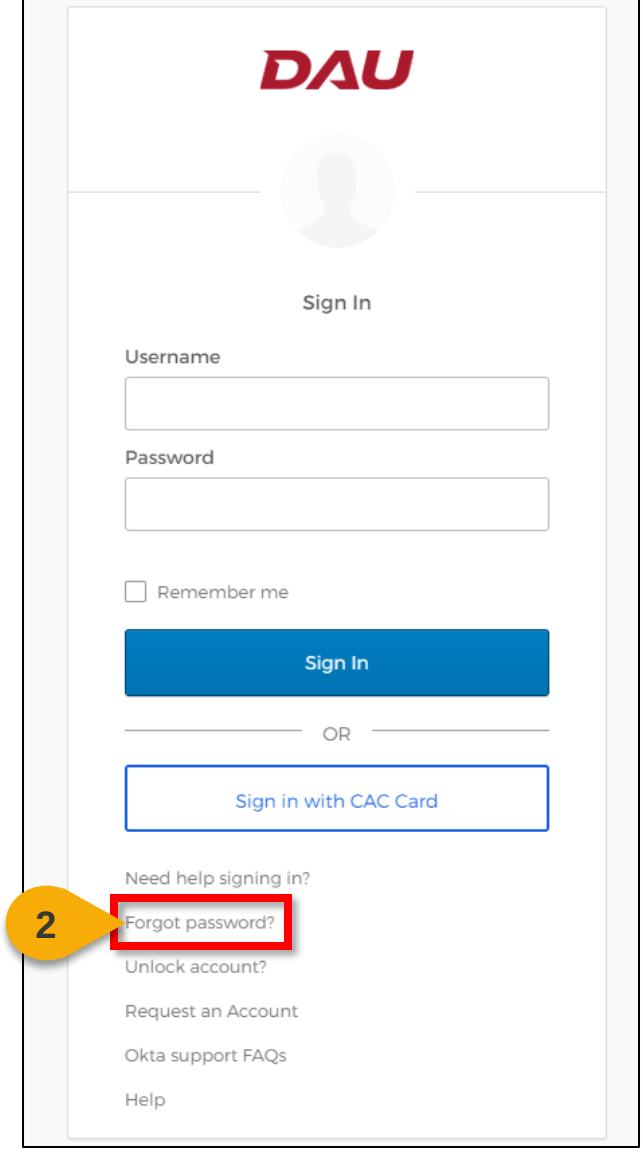
When you can't log on…

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



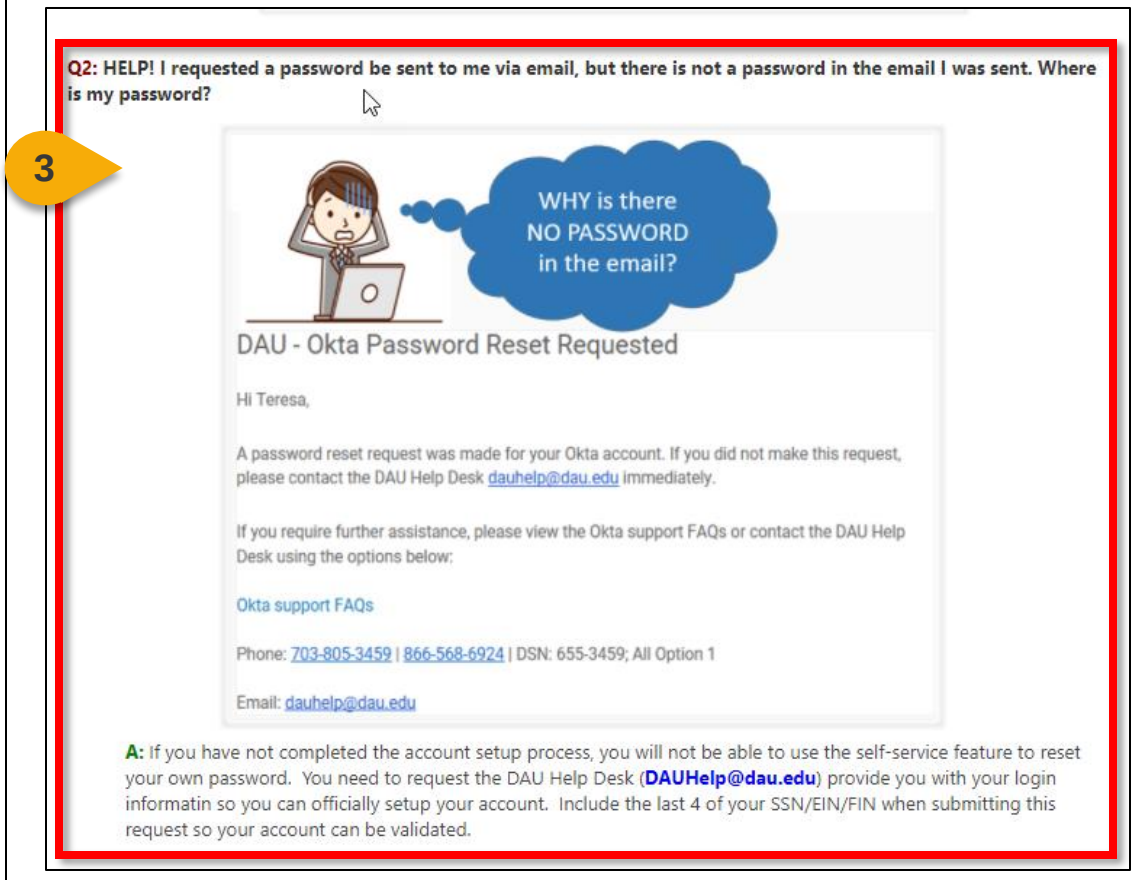
Forgot Password (Cont.1)

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

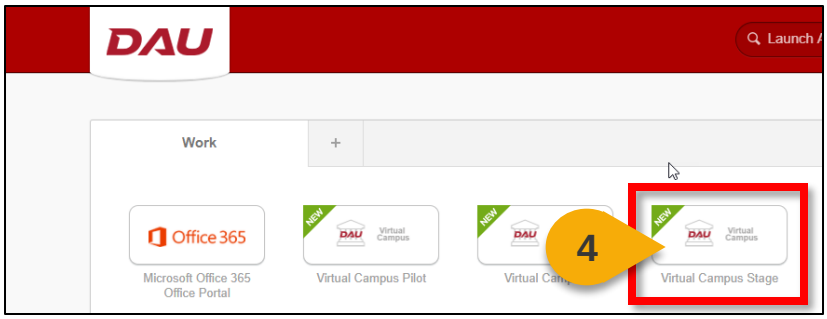


Forgot Password (Cont.2)

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

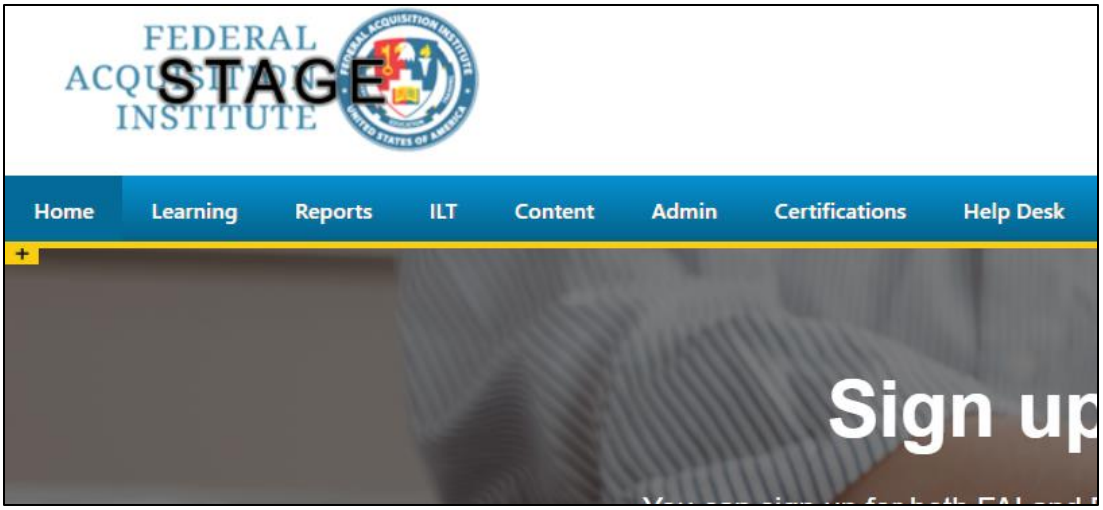


Step 4: Once you have the username and password entered, the list of systems you have access to will pop up. Select the **Virtual Campus Stage** button.



Forgot Password (Cont.3)

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



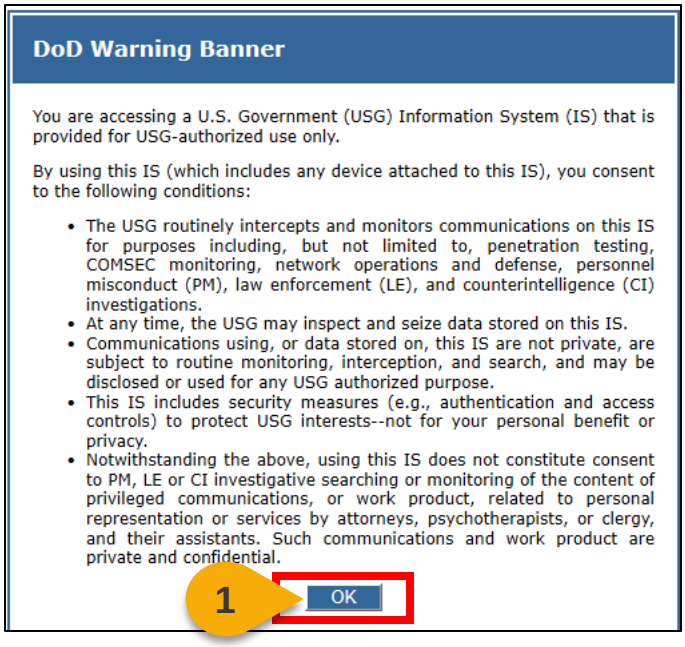
NOTE: If you receive an error message:

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

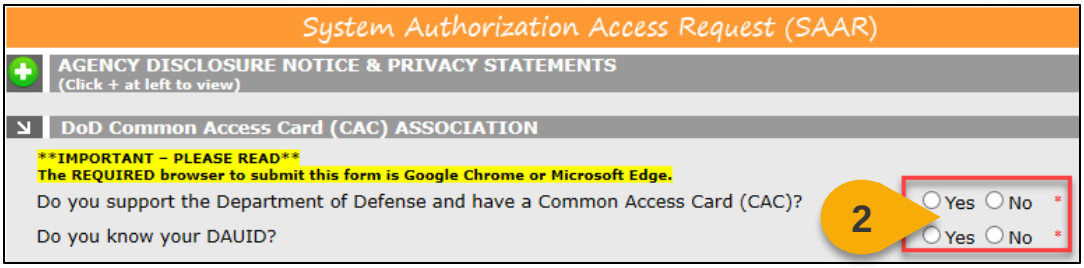
Request an Account Using the SAAR Form

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

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



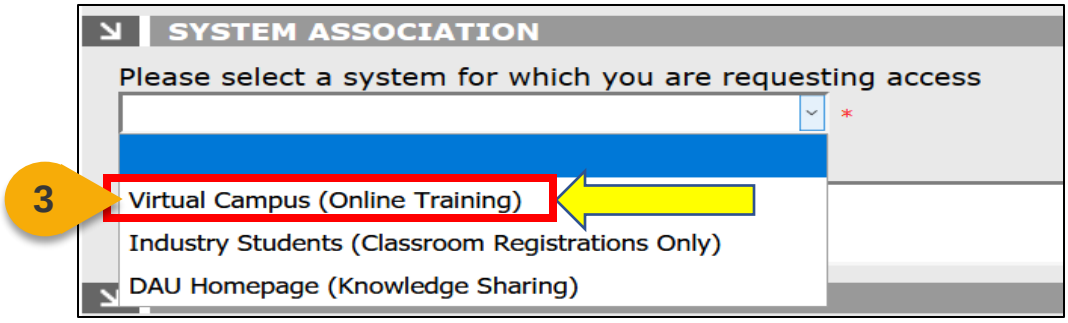
Step 2: Click the **radio buttons** to answer the questions regarding having a DoD CAC and/or DAUID.



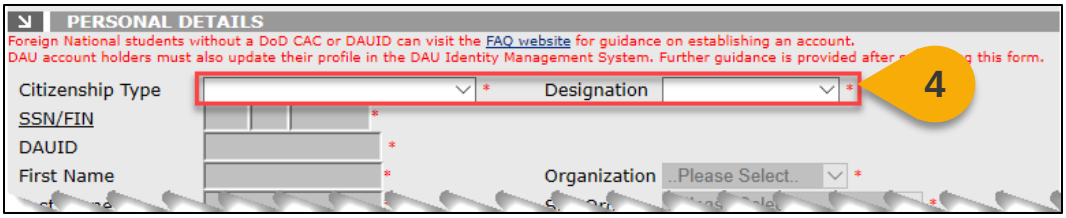
NOTE: If you support the Department of Defense and have a Common Access Card (CAC), the system can determine if there is already a DAUID associated to your information. If you select "Yes" and the system does find your account, the fields for your DAUID, Name, and Email address under PERSONAL DETAILS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

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

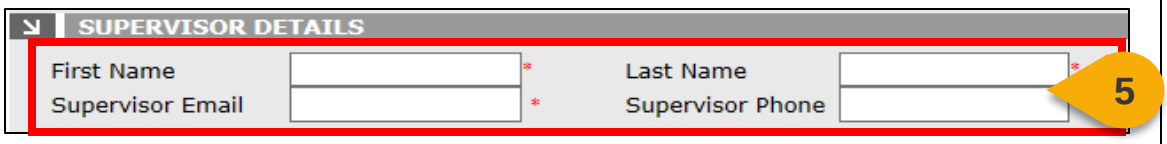
Step 3: Under SYSTEM ASSOCIATION you must select "**Virtual Campus (Online Training)**". If you choose one of the other options, this will significantly delay the process to have an account created to take a course.



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



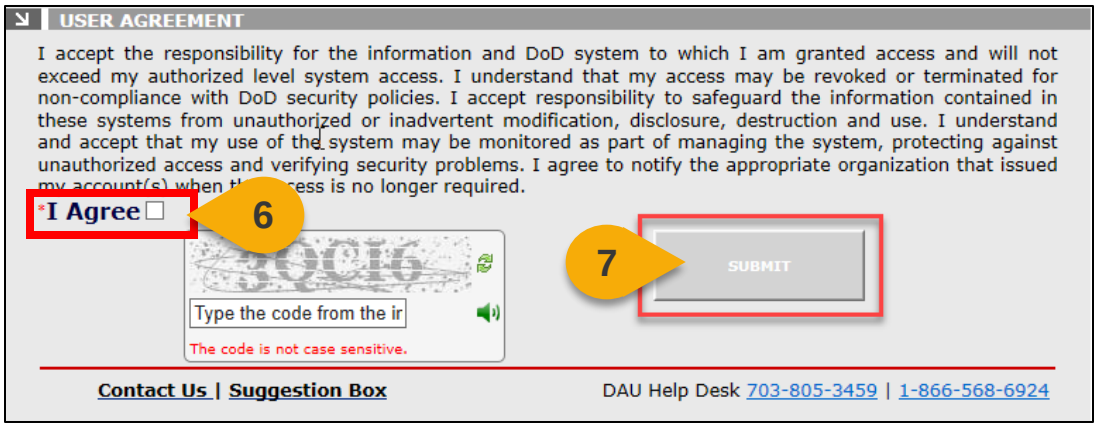
Step 5: Enter your **SUPERVISOR DETAILS**.



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

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

.

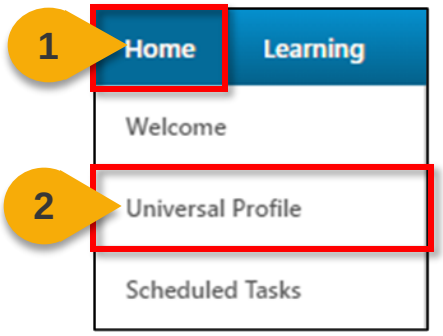


IMPORTANT: If there was any information that was not filled in correctly, there will be red text in the area of the form that requires your attention for correction. Afterwards, you will need to select the "**I Agree**" check box again and enter the new code in the image box for your SAAR to be submitted.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

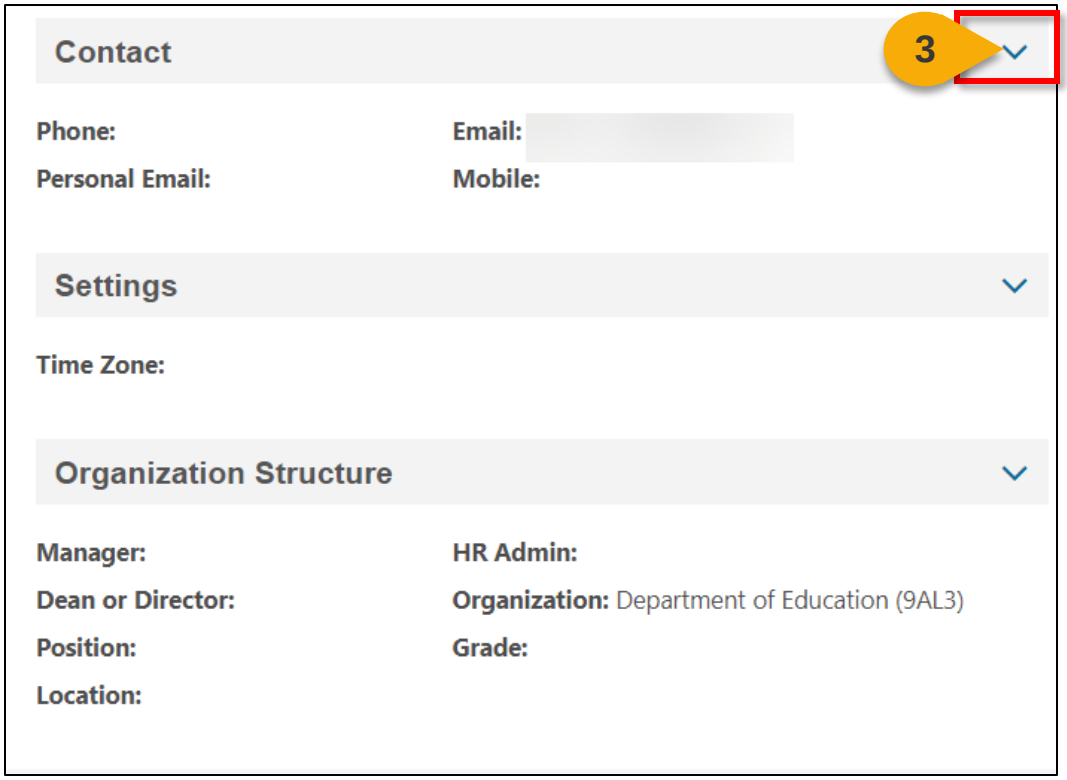
View User Record

When you want to view your User Record…

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



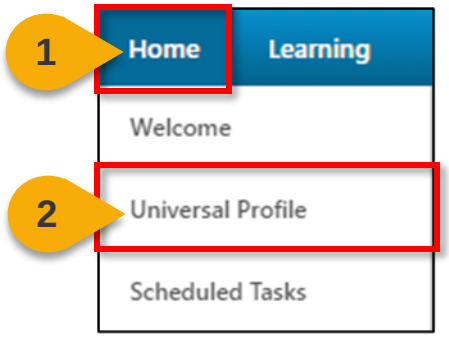
Step 3: To expand a section, click on the **arrow** to the right of that section.



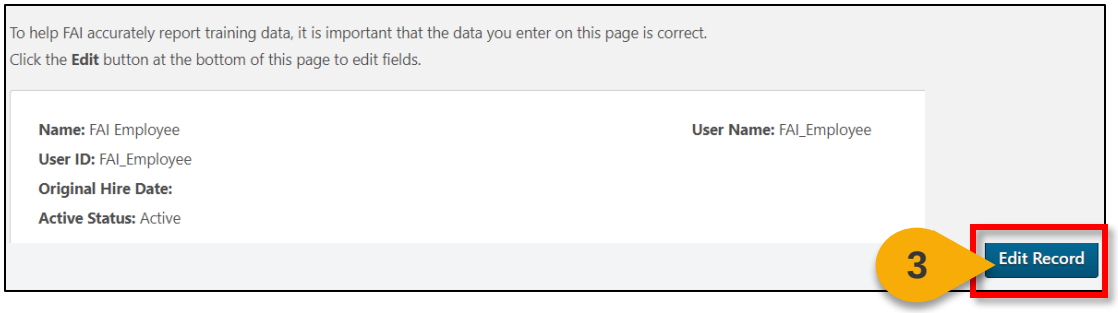
Edit User Record

When you want to edit information on the user record…

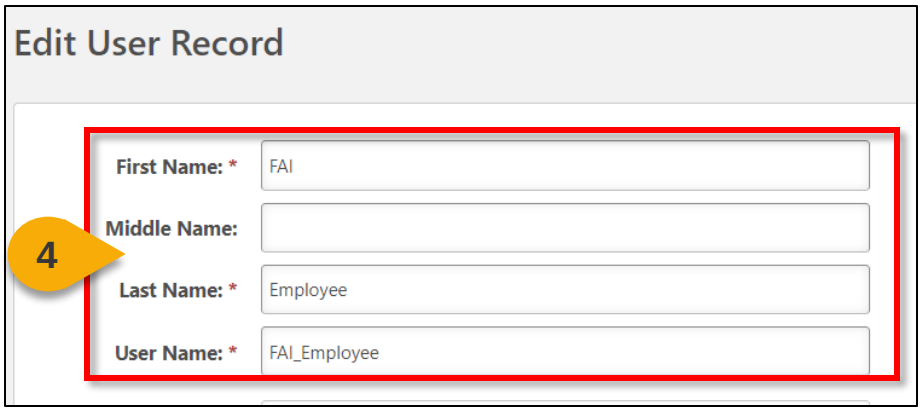
Steps 1 & 2: Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



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

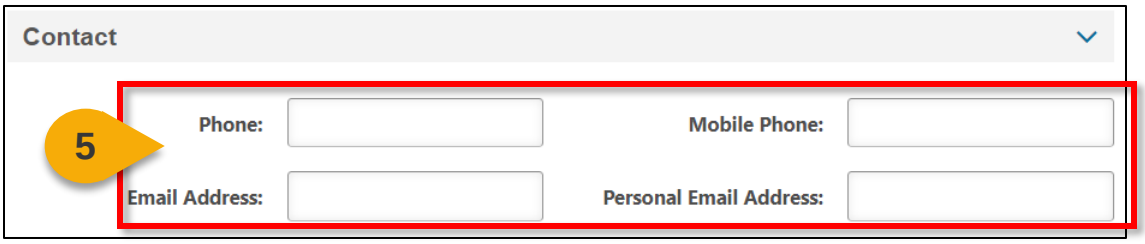


Step 4: In the first section at the top of the screen, you can edit your **First Name, Middle Name, Last Name, and User Name.**

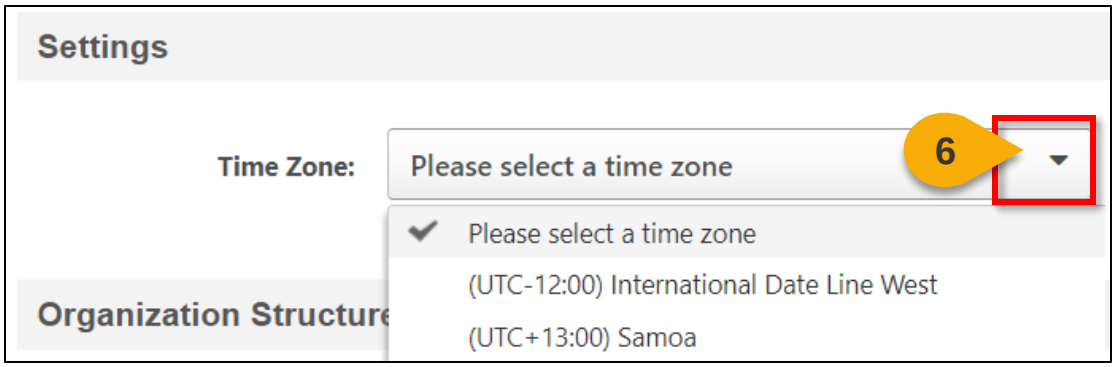


Edit User Record (Cont.1)

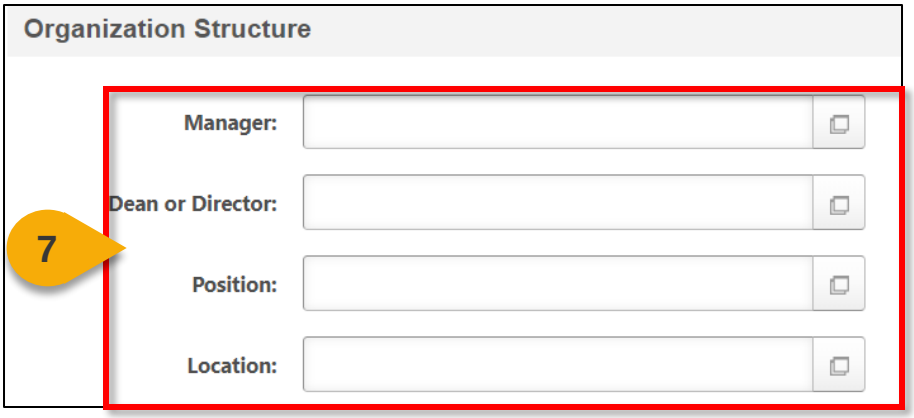
Step 5: In the Contact section, you can fill in your **Phone, Mobile Phone, Email Address, and Personal Email Address.**



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

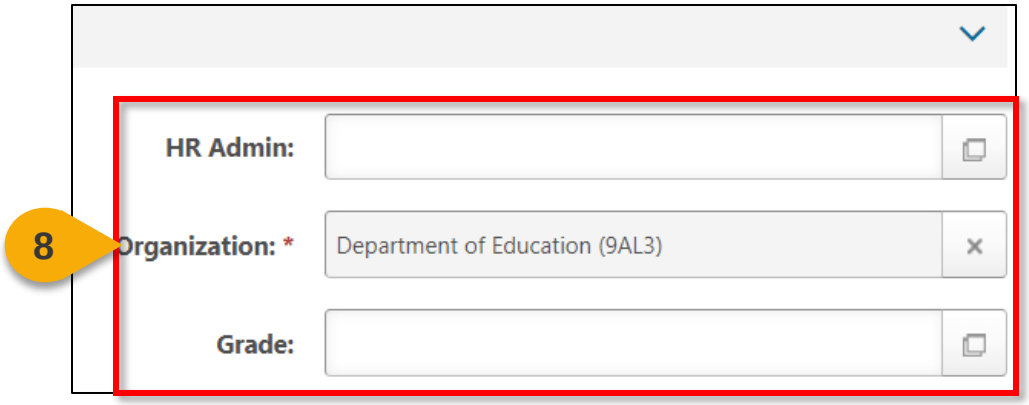


Step 7: In the Organization Structure section, you can input your **Manager, Dean or Director, Position, Location**.

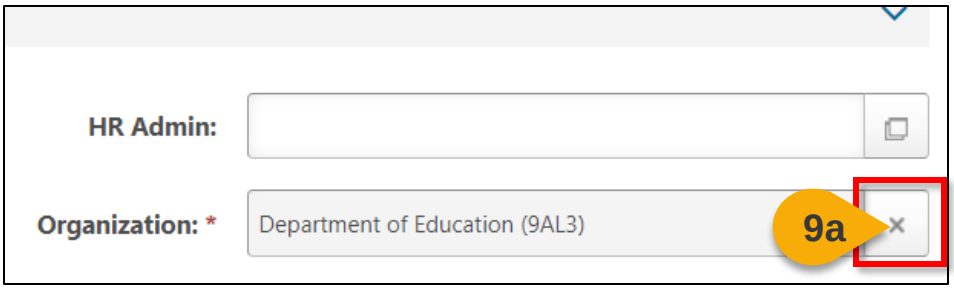


Edit User Record (Cont.2)

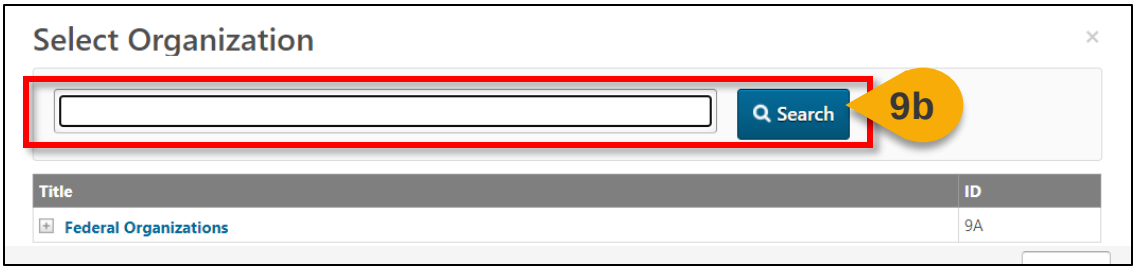
Step 8: In the Organization Structure, you can also edit the **HR Admin, Organization, and Grade.**



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

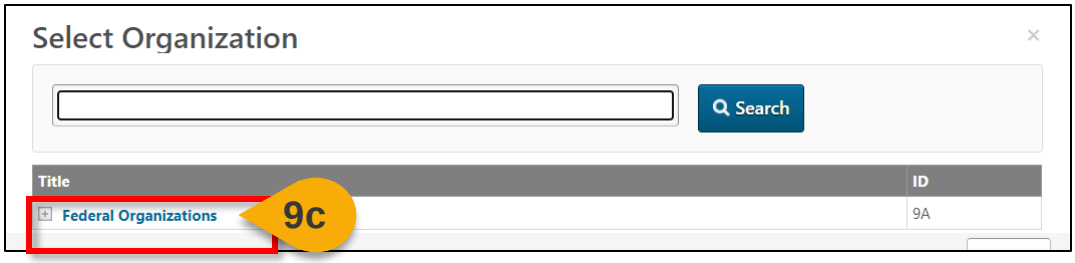


Step 9b: You can manually enter the name of your organization in the **search box.**

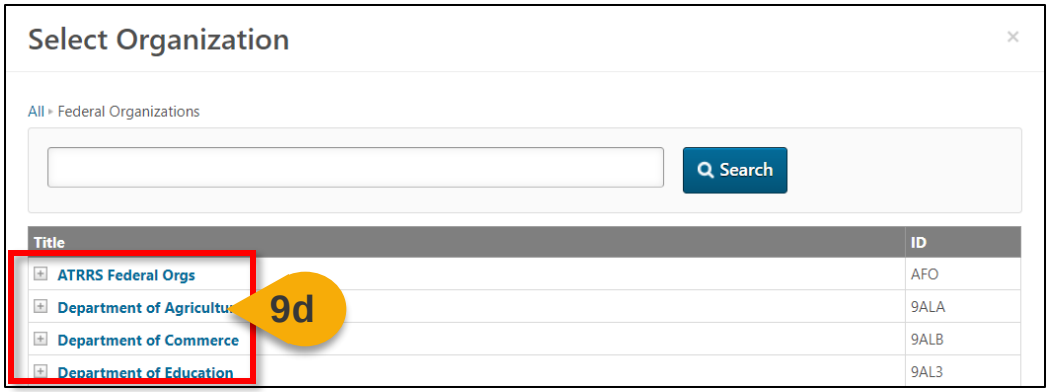


Edit User Record (Cont.3)

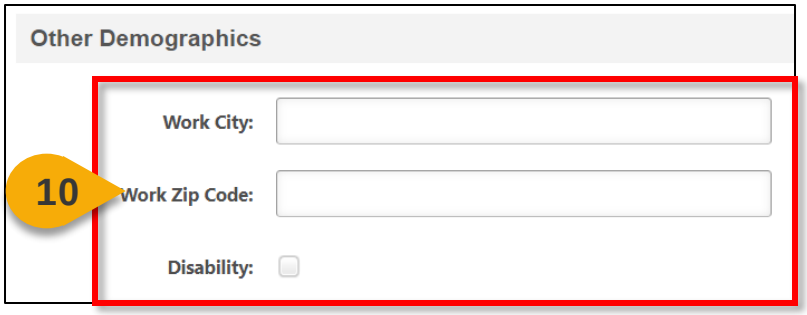
Step 9c: You can also click **Federal Organizations** to drill down to see more organizations and search manually.



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

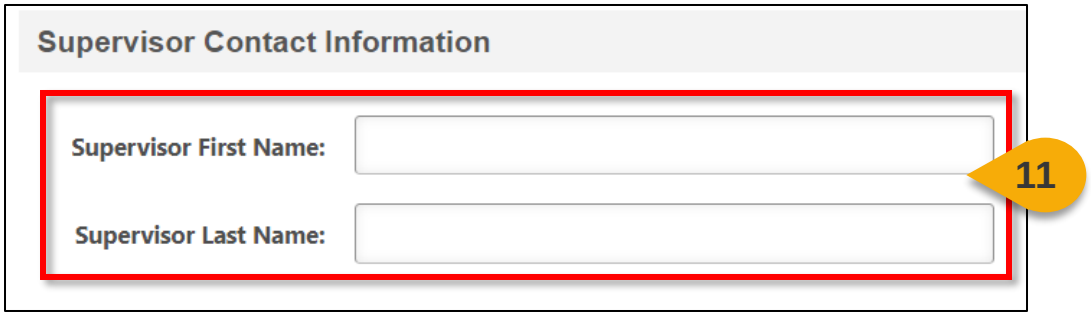


Step 10: In the Other Demographics section, you have the option to fill in additional information on your demographics such as **Work City, Zip Code, Disability, etc.**

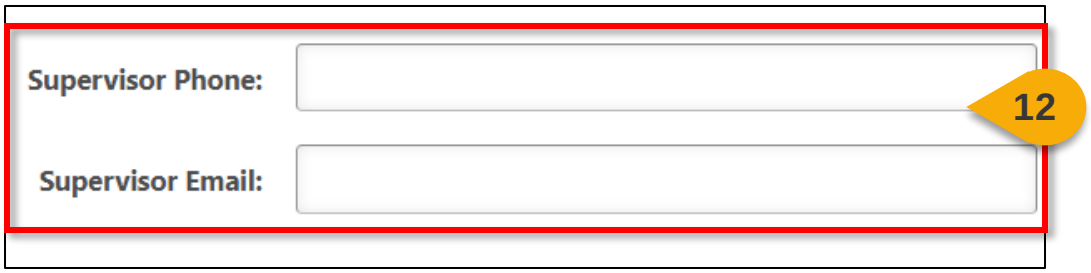


Edit User Record (Cont.4)

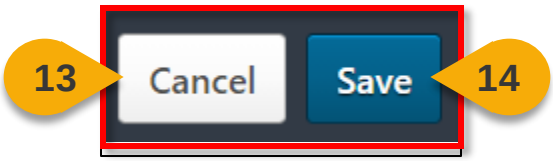
Step 11: In the Supervisor Contact Information section, you can fill in the **first and last name** of your supervisor.



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



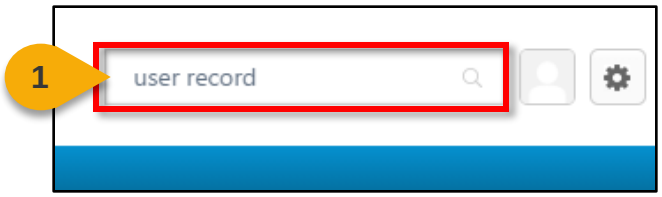
Steps 13 & 14: Click **Save** to keep all the changes or click **Cancel** to discard the changes.



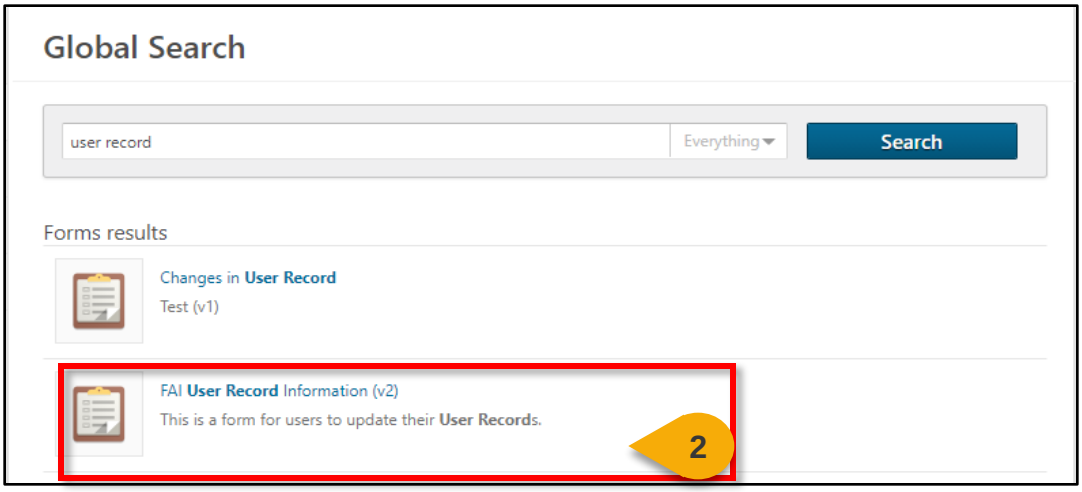
Edit User Record via Advanced Forms

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

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

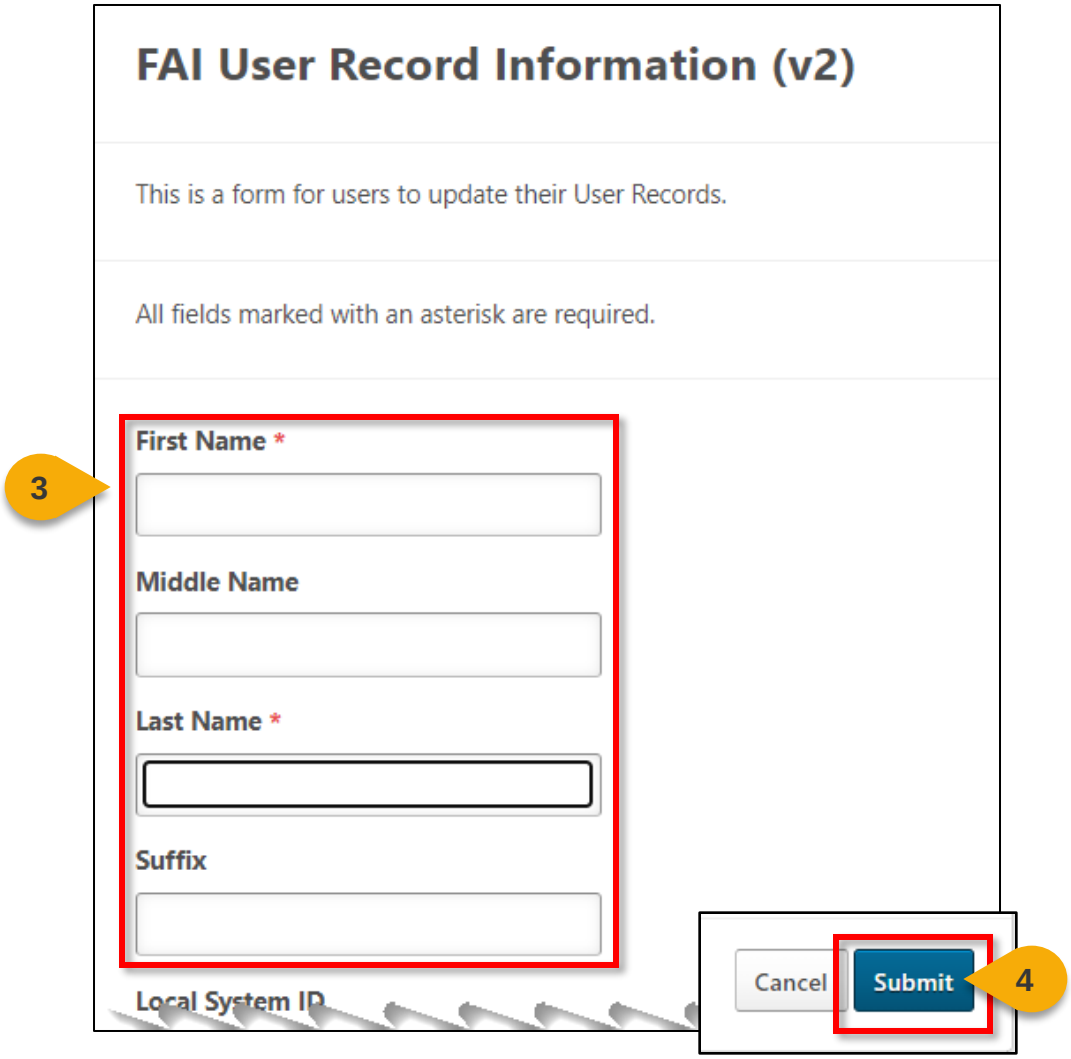


Step 2: Select the **FAI User Record Information** form.



Edit User Record via Advanced Forms (Cont.1)

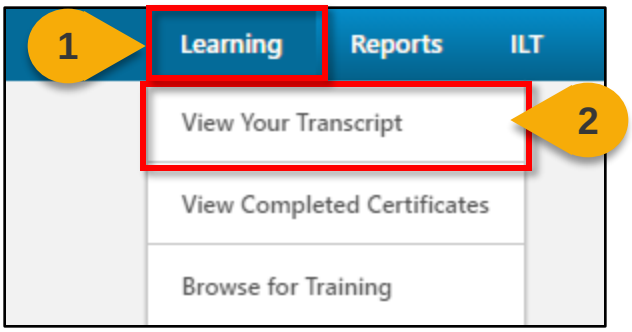
Steps 3 & 4: Fill in the form and click **Submit** at the bottom of the page when finished. Fields with a * are required. You will see the changes reflected on your User Record immediately.



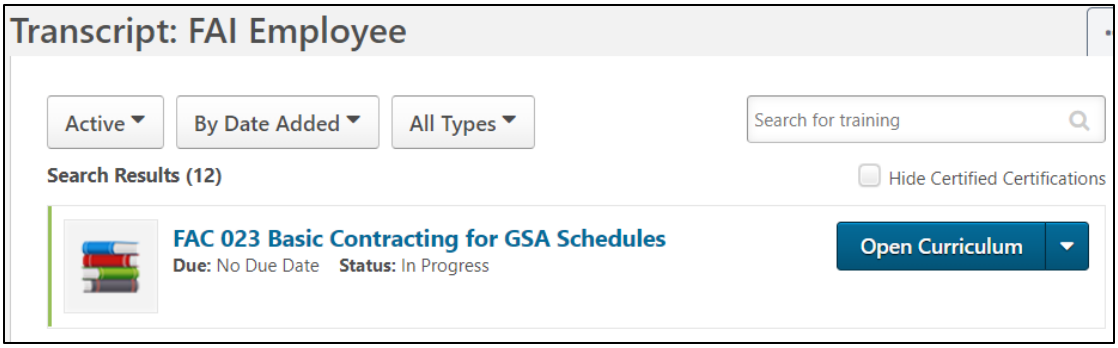
View Transcript

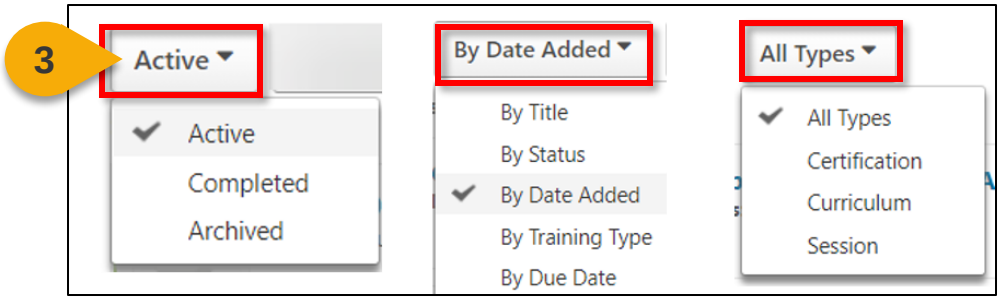
When you want to view your Transcript…

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



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

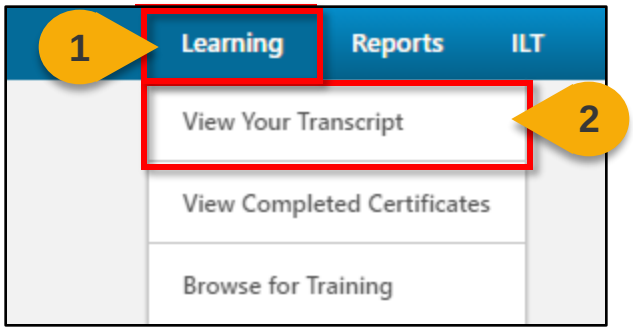




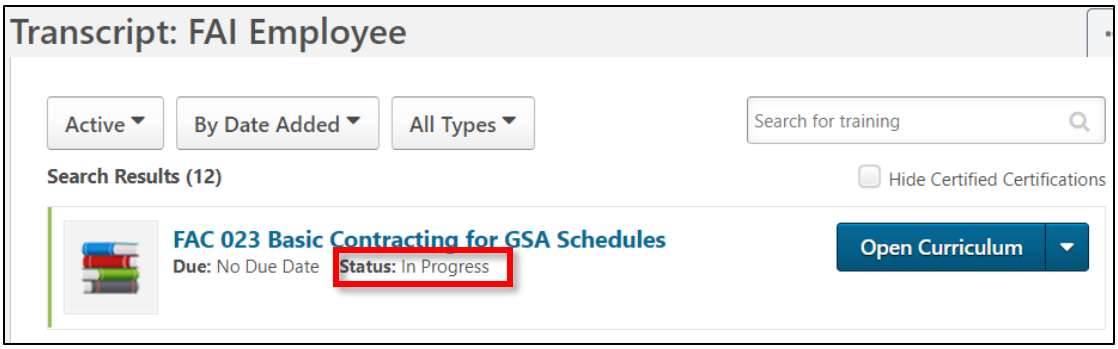
View Transcript Status

When you want to view your Transcript status…

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



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

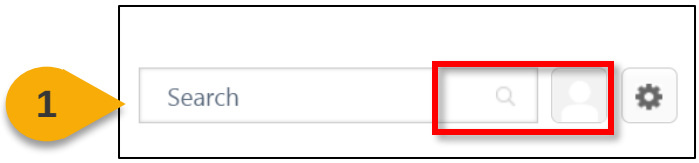


Use Global Search

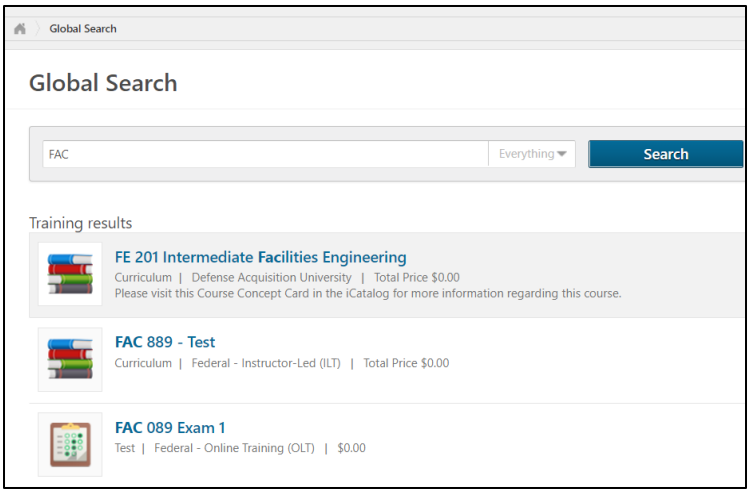
When you want to search for Training, Certifications, or Forms…

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

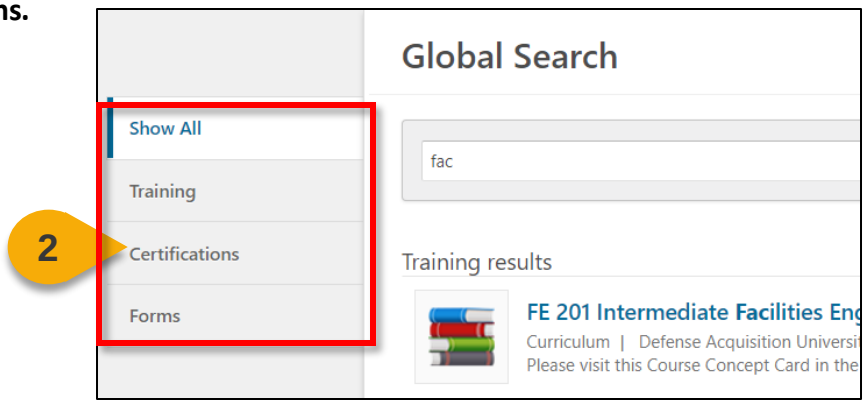
Step 1: Enter your desired Search Terms and click the **Magnifying Glass** or hit enter to search.



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



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

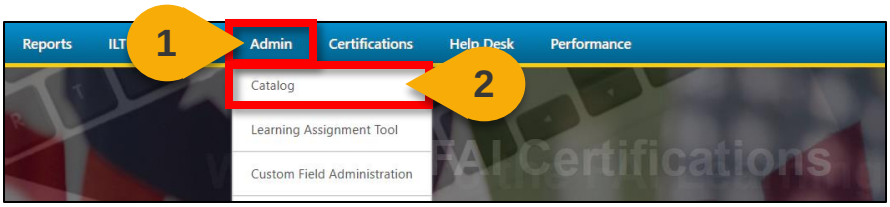


Instructor-Led Training

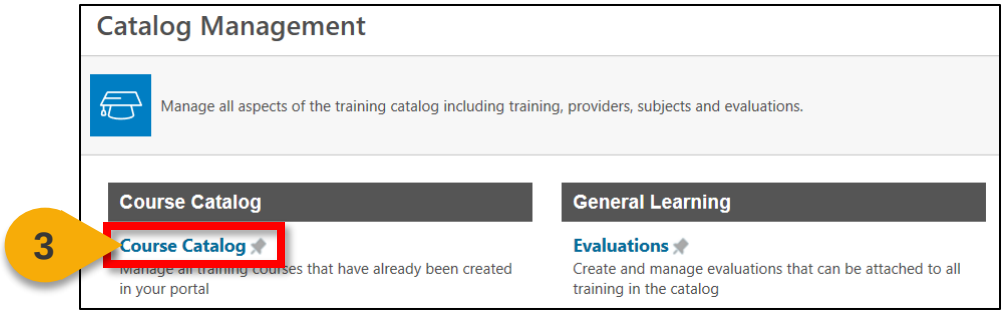
View Instructor-Led Training in Catalog

When you want to view online training…

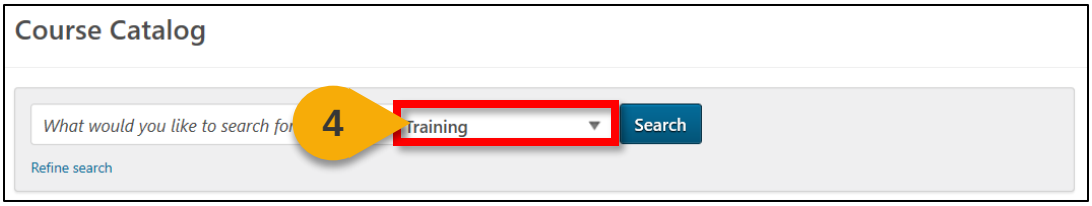
Steps 1 & 2: Go to Admin, then select Catalog.



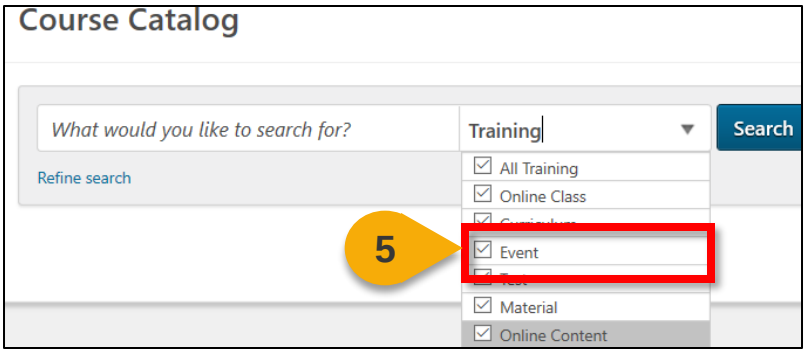
Step 3: Click on Course Catalog.



Step 4: After you enter the name of the course you are searching for click on the Training dropdown next to the search box.

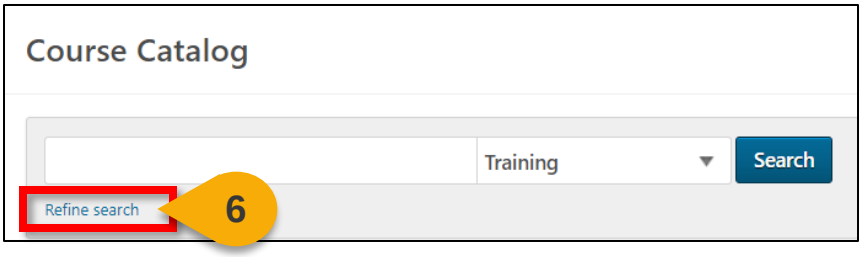


Step 5: Check the box next to Event to filter your search.

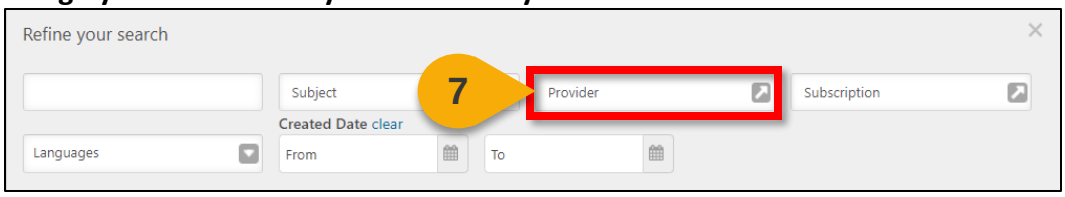


View ILT in Catalog (Cont.1)

Step 6: Click **Refine Search.**

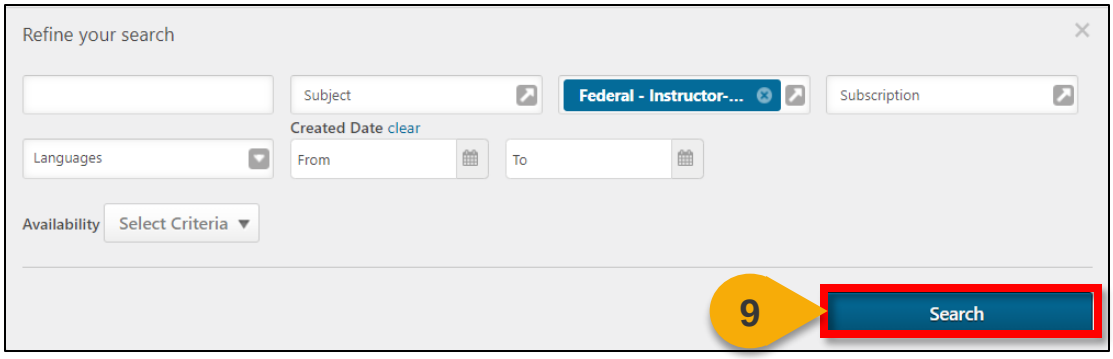


Step 7: Click Provider to filter by Provider. You can follow the instructions below for filtering by Provider for any of the Refine your search fields.



Step 7: Select Provider you wish to filter your search results by.

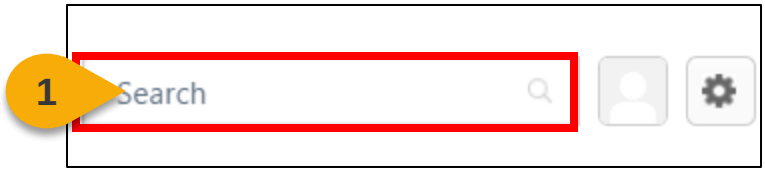
Step 9: Click Search. All relevant ILT will appear in the search



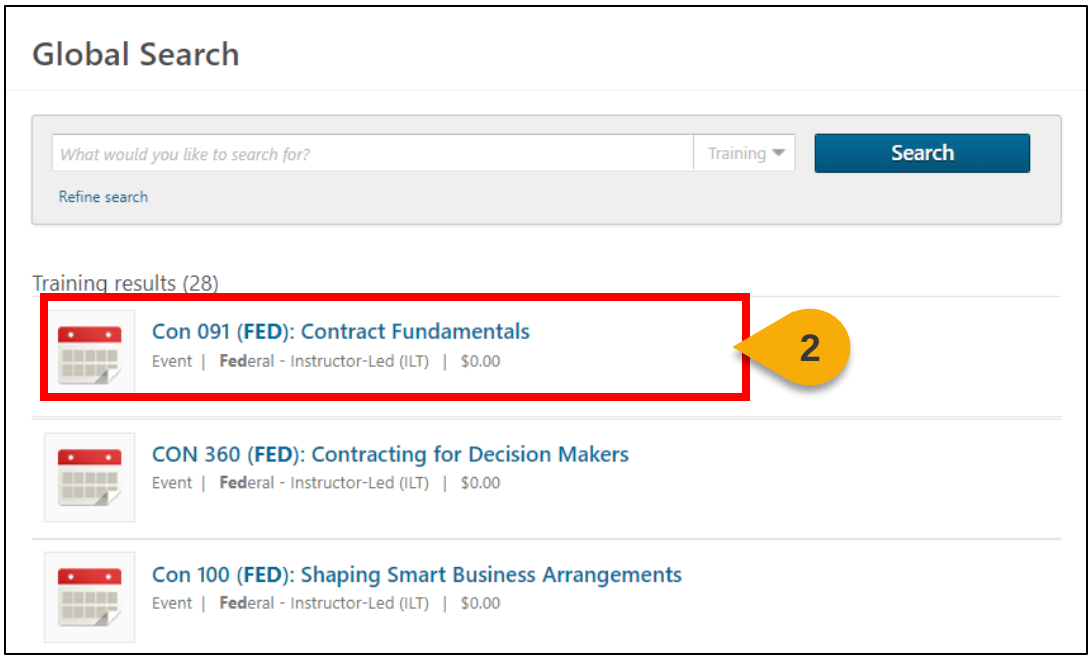
Assign Instructor-Led Training (ILTs)

When you want to assign an instructor led training course to your subordinates…

Step 1: Search for the event that you would like to find using Global Search.

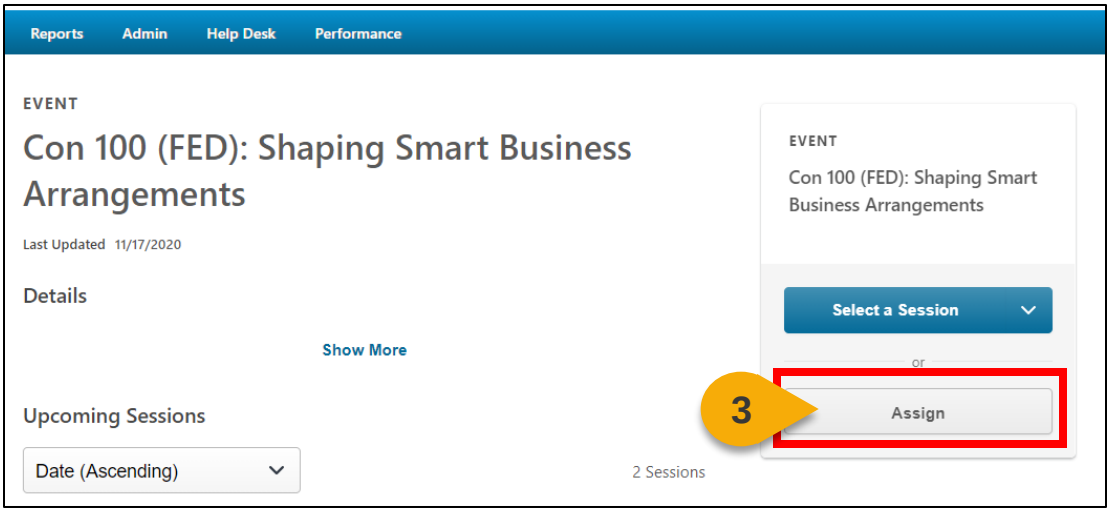


Step 2: Select the **Event** you want to assign to users.

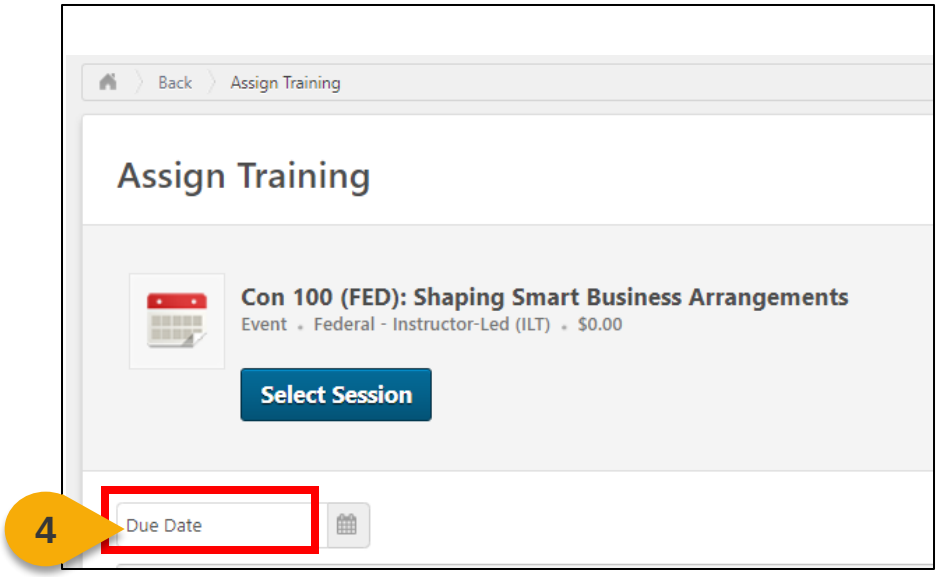


Assign ILTs (Cont. 1)

Step 3: Click **Assign** in the panel on the right to assign the Event but allow the assignee to choose their own Session.



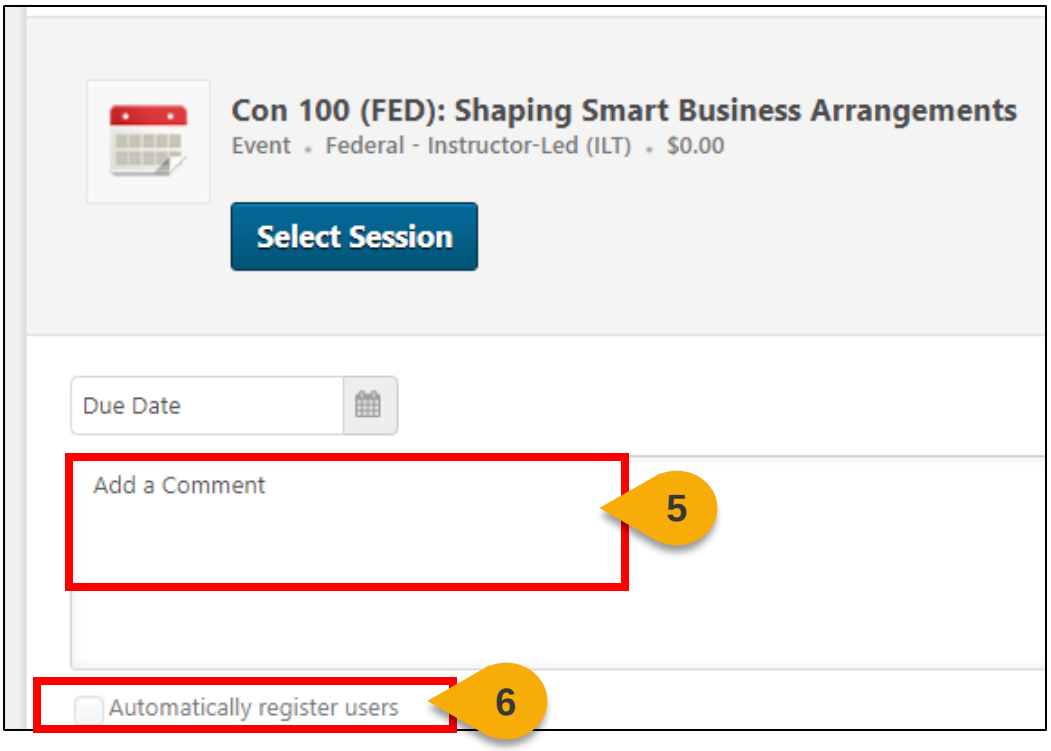
Step 4: Enter a **Due Date** for the training, if applicable.



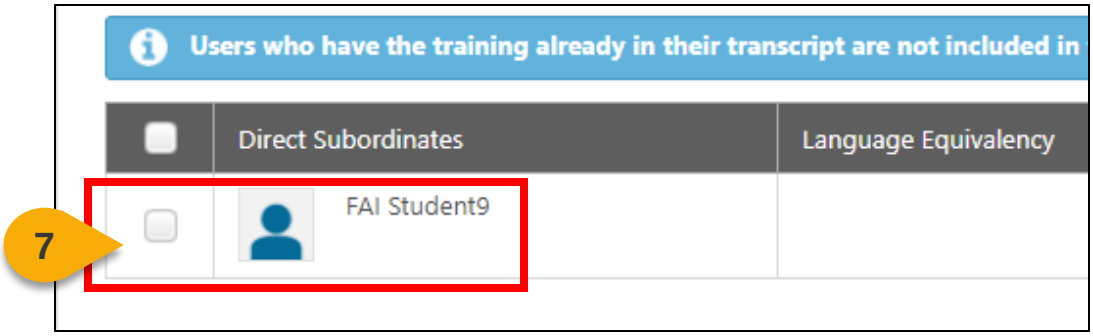
Assign ILTs (Cont. 2)

Step 5: Enter any comments in the **Comment box.**

Step 6: You can decide to automatically register subordinates into the ILT (by passing approval workflows) by click the checkbox next to "Automatically Registers Users" (recommended).

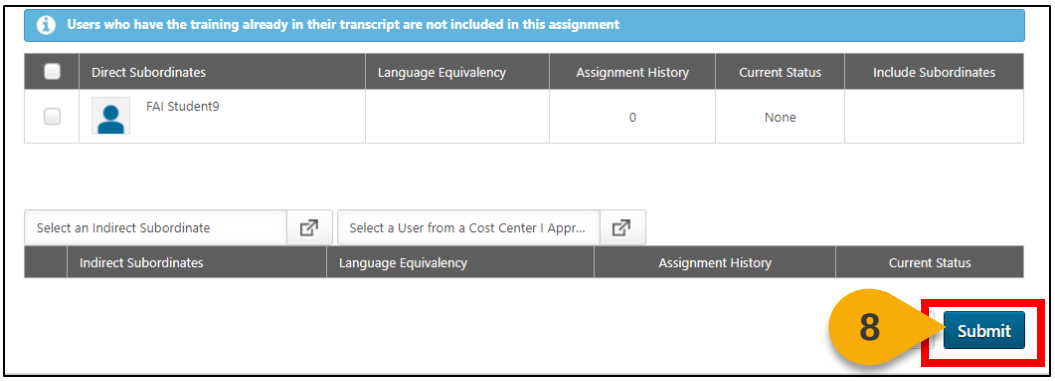


Step 7: Select the **subordinates** you want to assign the training to. You may assign to your direct and indirect subordinates.



Assign ILTs (Cont. 3)

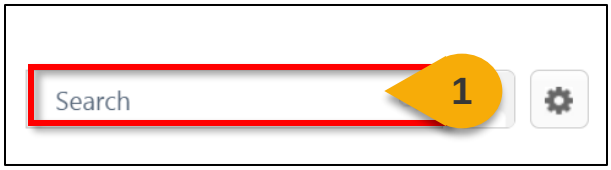
Step 8: Click the **Submit** button at the bottom of the page.

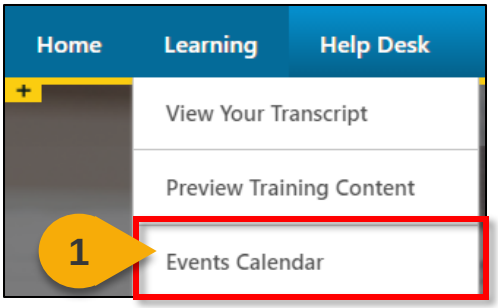


Register for Instructor-Led Training (ILT)

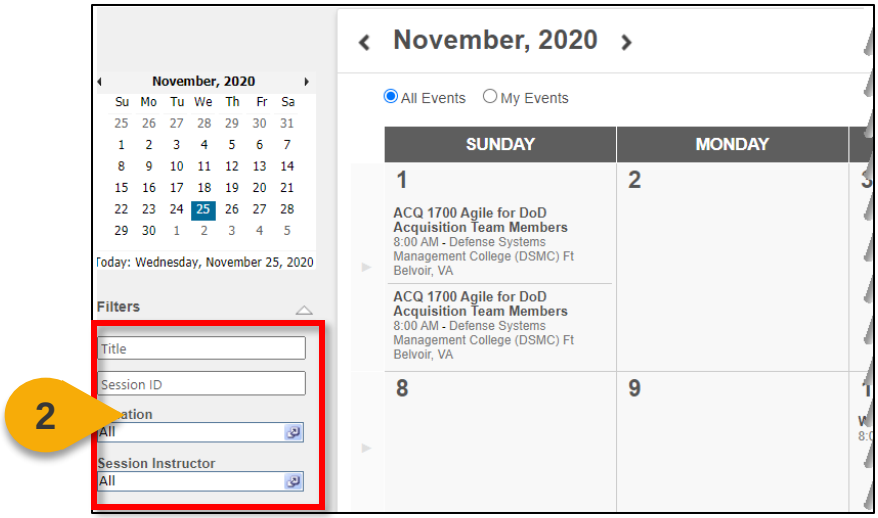
When you want to register for an Instructor Led Training…

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

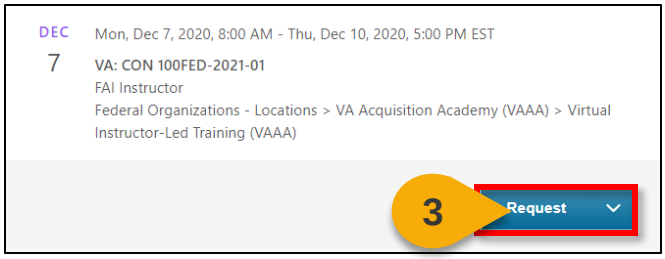




Step 2: On the Events Calendar, you can search by Title, Session ID, Subject, or Instructor.



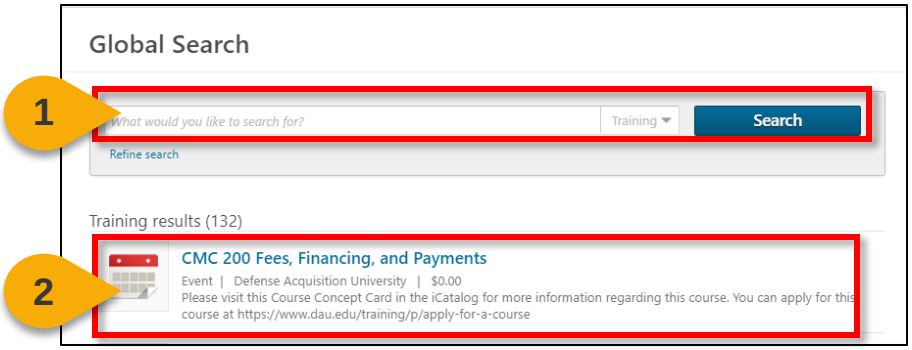
Step 3: The Event will be displayed on the screen. You will see any available Sessions. Next to the desired Session, click on **Request.**



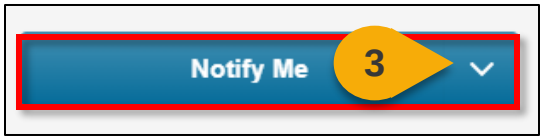
Indicate Interest in a Future Session

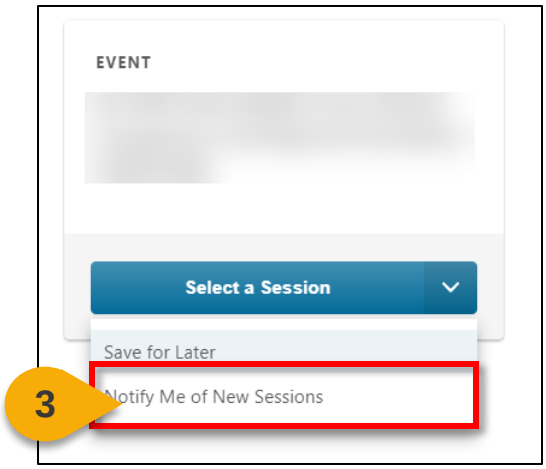
When you want to express interest in a course once new Sessions become available…

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

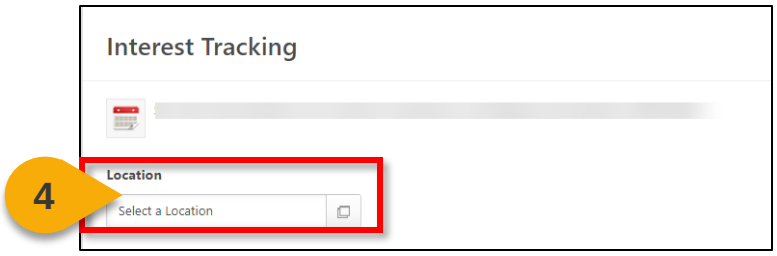


Step 3: On the on the Event page, click either the **Notify Me** or **Notify Me of New Sessions** button.



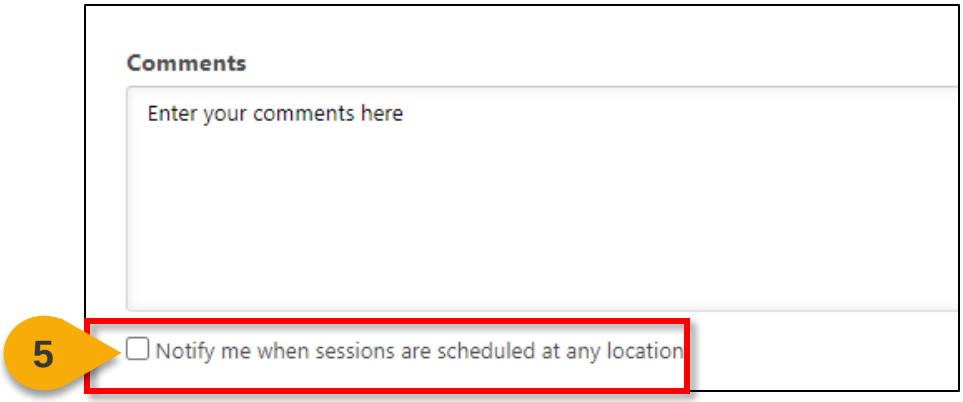


Step 4: You have the option to select to be notified of Sessions held in a specific location. Enter the **Location** field to do this.



Indicate Interest in a Future Session (Cont. 1)

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

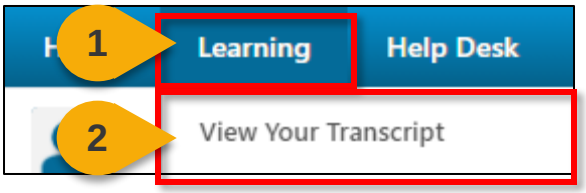


Step 6: Once you have completed selecting the location preferences, click the **Submit** button at the bottom of the page.

Withdraw from an ILT

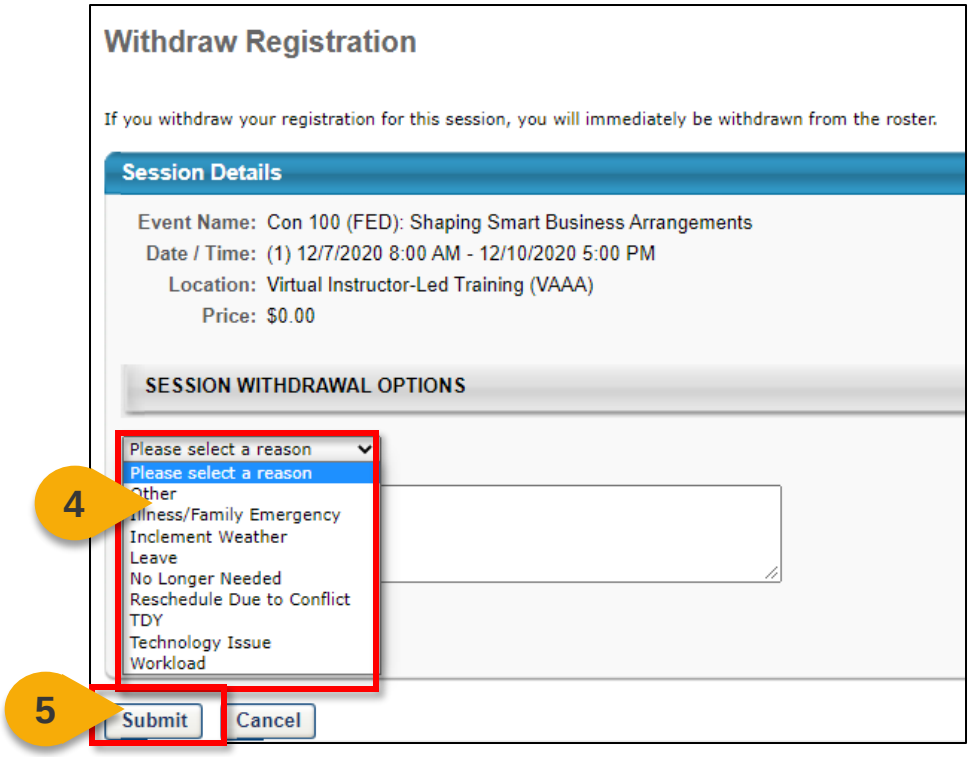
When you need to withdraw from an ILT course…

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



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

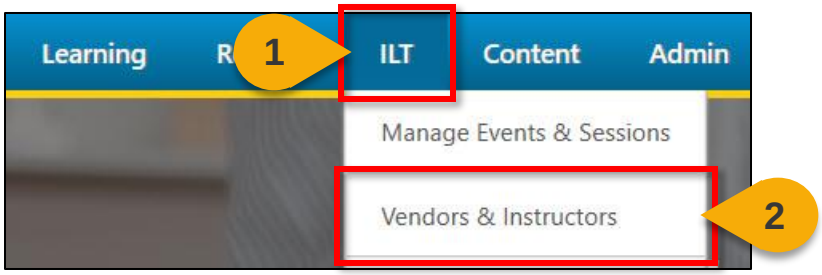
Step 4 & 5: Select a reason for withdrawal and then click **Submit.**



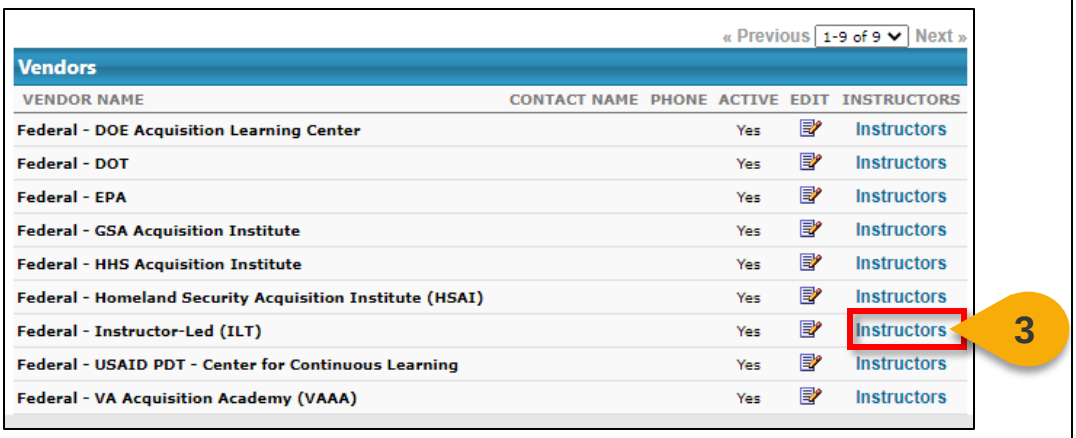
View Instructors for Your Schoolhouse

When you want to view available Instructors…

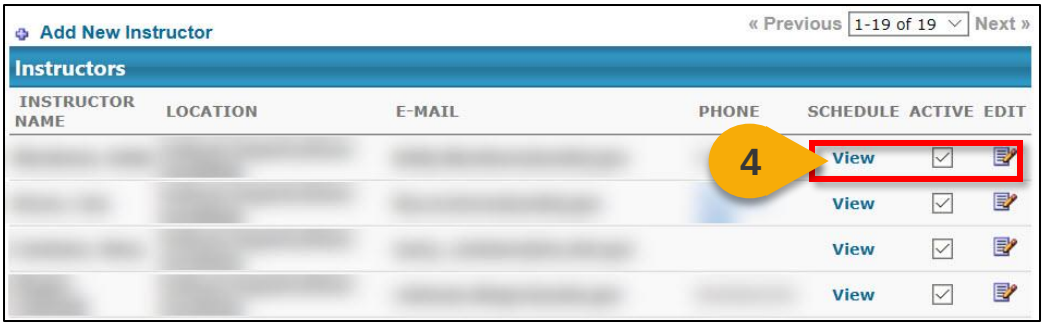
Steps 1 & 2: Hover over the **ILT** tab, then select **Vendors & Instructors.**



Step 3: Click on the **Instructors** link to the right of the Vendor or Training Provider for which you wish to view Instructors.



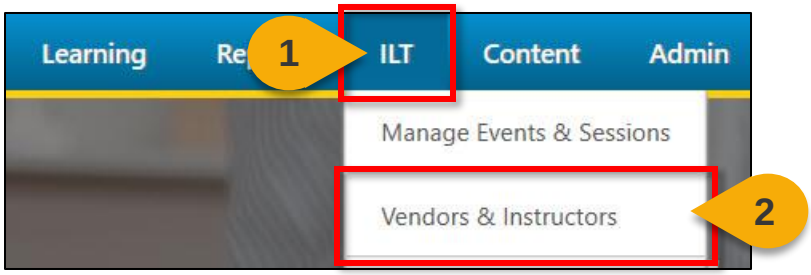
Step 4: You will then be directed to the **Instructors** page. From here, you can take action to **view their schedule, inactivate the Instructor,** or **edit their information**.



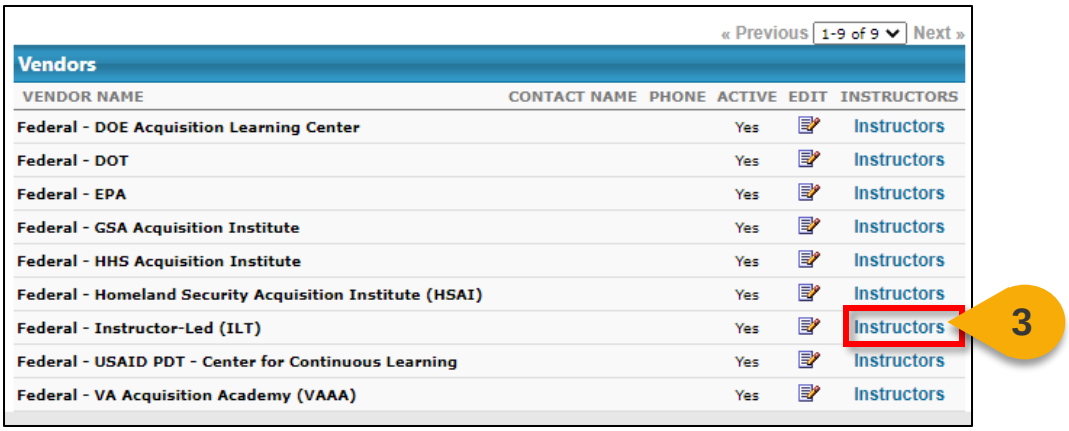
Add CSOD User as an Instructor

When you want to add an Instructor who is already a CSOD user…

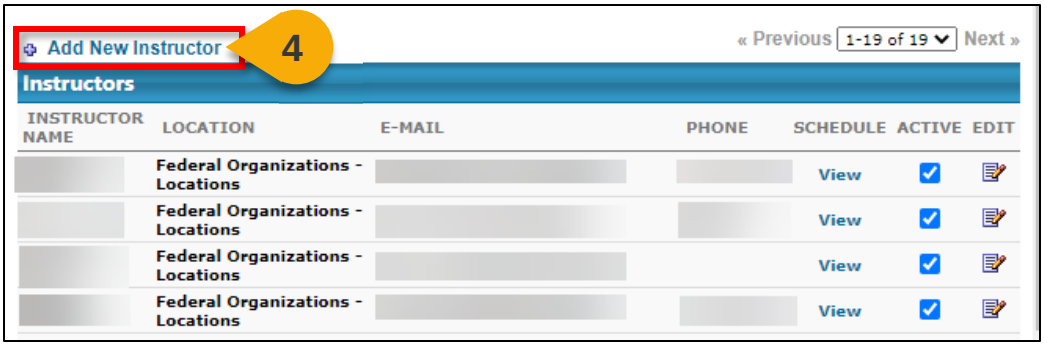
Steps 1 & 2: Hover over the **ILT** tab, then select **Vendors & Instructors**.



Step 3: To the right of the appropriate Vendor, click the **Instructors** link.

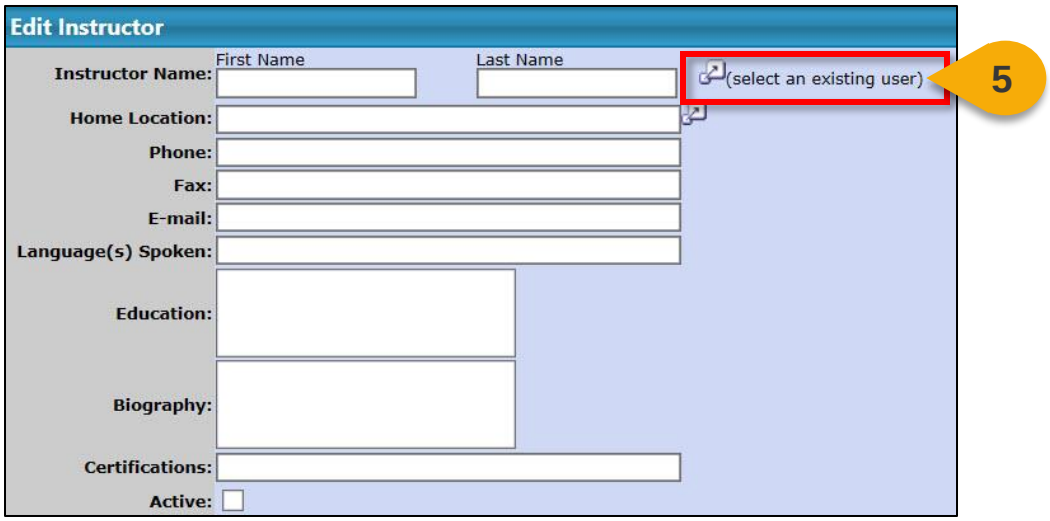


Step 4: On the Instructors page, click the **Add New Instructor** link.

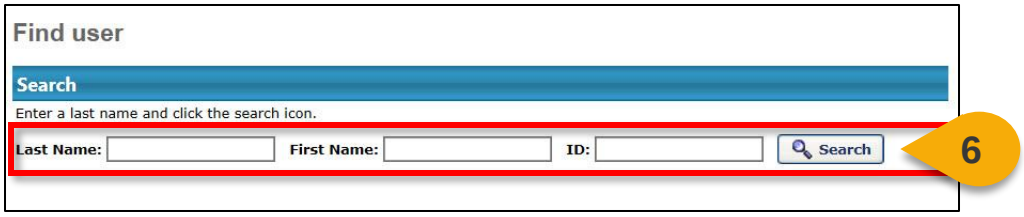


Add CSOD User as an Instructor (Cont. 1)

Step 5: Click on the (select an existing User) pop out next to the Last Name field.



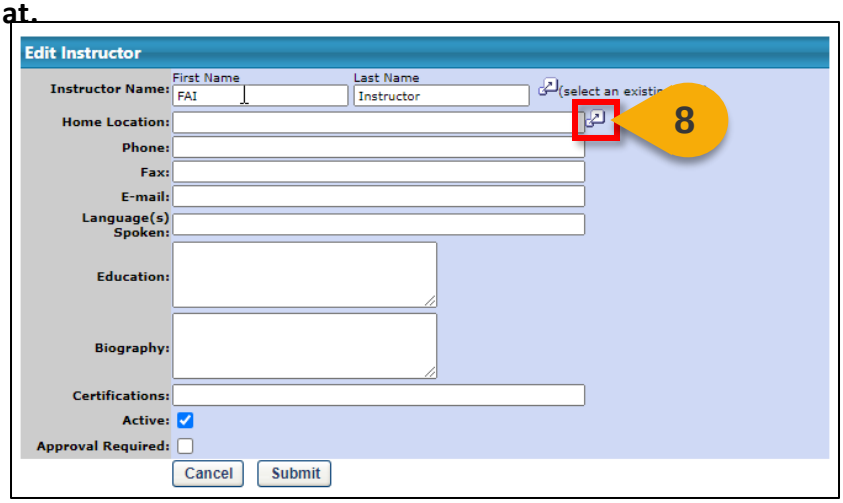
Step 6: Search for the User by First Name, Last name, or User ID. Click Search or hit Enter.



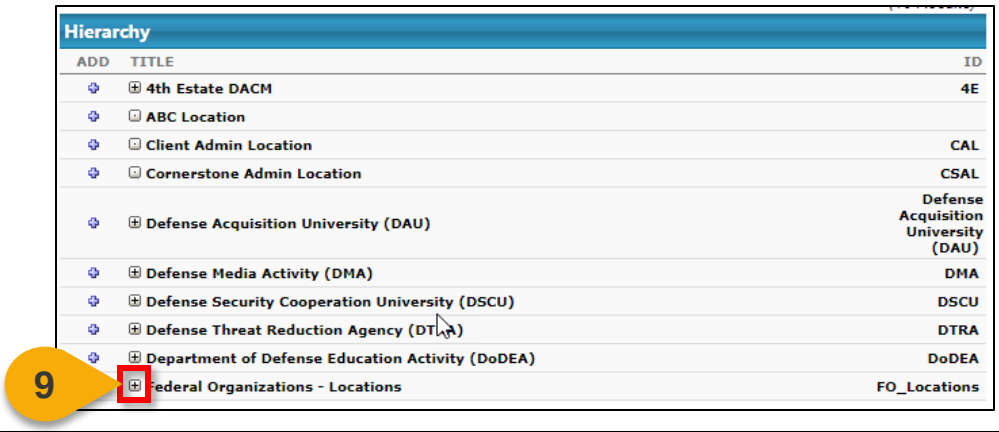
Step 7: In the search results, select the **Name** of the Instructor you wish to add.

Add CSOD User as an Instructor (Cont. 2)

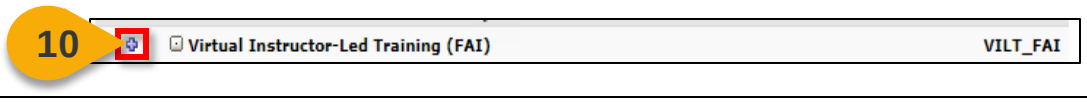
Step 8: The User's name will appear in the Edit Instructor panel of the Add Instructor page. Click the pop out next to Home Location to choose a location the Instructor will teach at.



Step 9: A new window will open. Click on the gray + next to Federal Organizations – Locations to drill down to the location you would like to select.

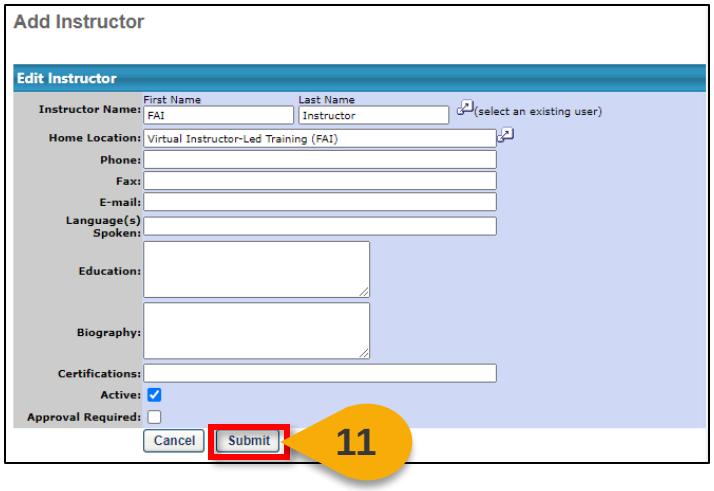


Step 10: When you find the location you need, click the **blue +** next to it to select it.

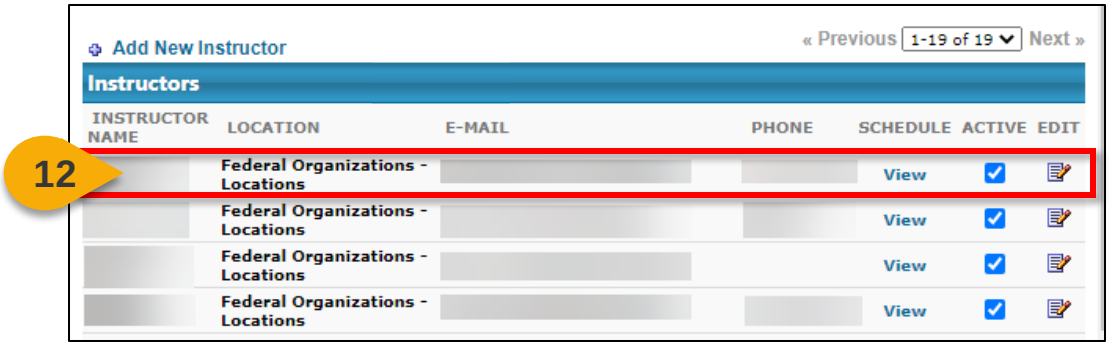


Add CSOD User as an Instructor (Cont. 3)

Step 11: The location will appear on the Edit Instructor panel on the Add Instructor page. You may fill in any additional information if desired. Then, click Submit to add the Instructor.



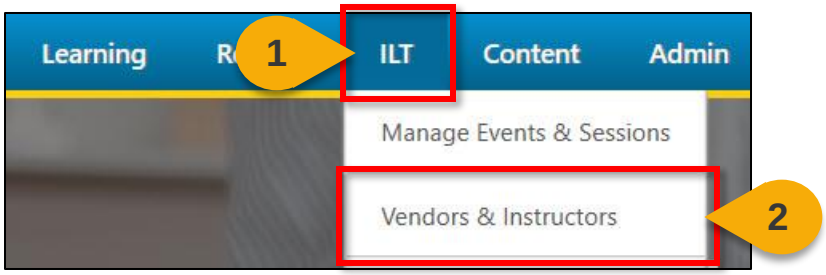
Step 12: You will be returned to the Instructor list for your location. You will be able to view and edit the Instructor you added.



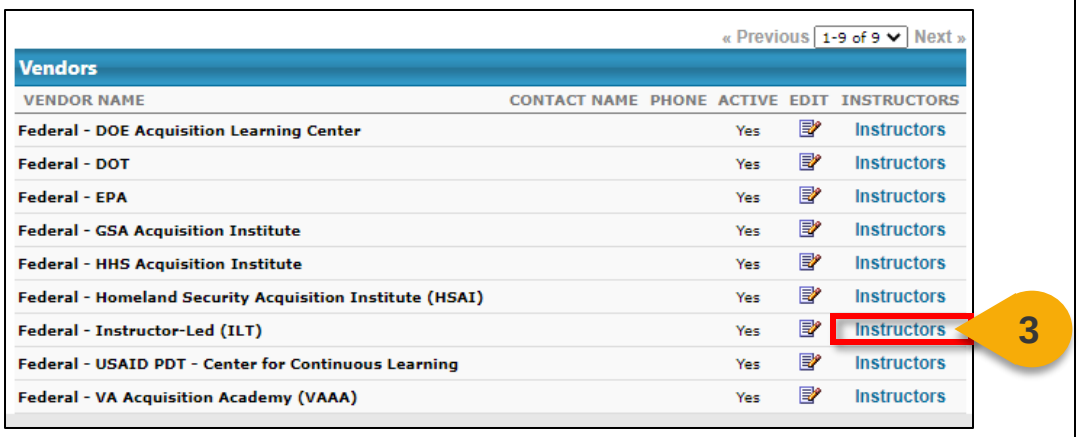
Add an External Instructor

When you want to add an Instructor who is not a CSOD User…

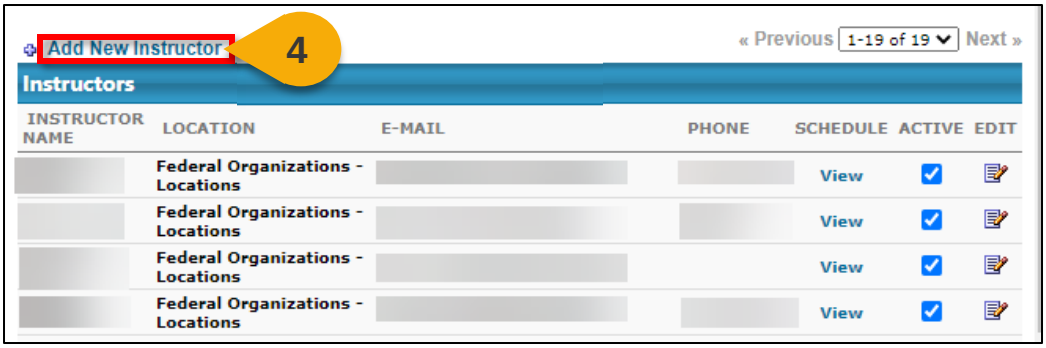
Steps 1 & 2: Hover over the **ILT** tab, then select **Vendors & Instructors**.



Step 3: To the right of the appropriate vendor, click the **Instructors** link.

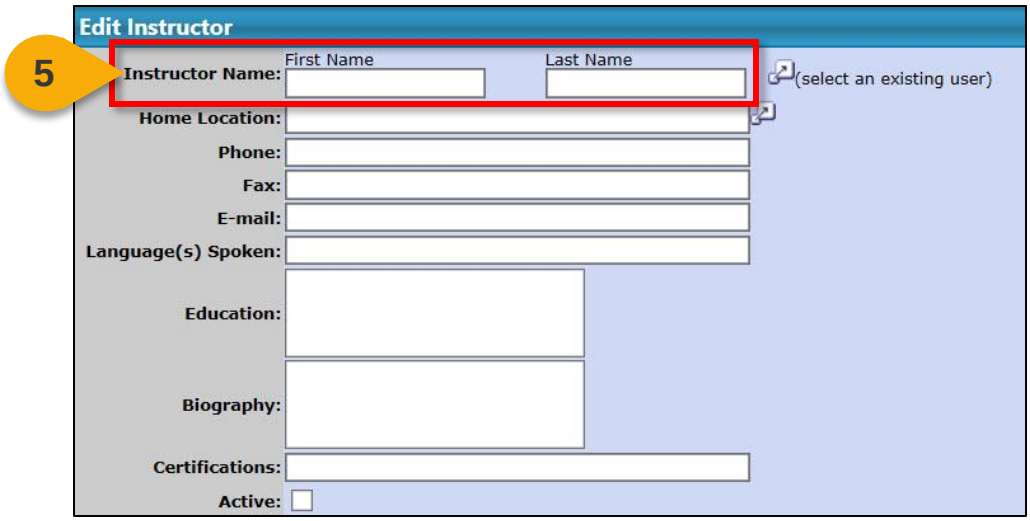


Step 4: Click the **Add New Instructor** link.

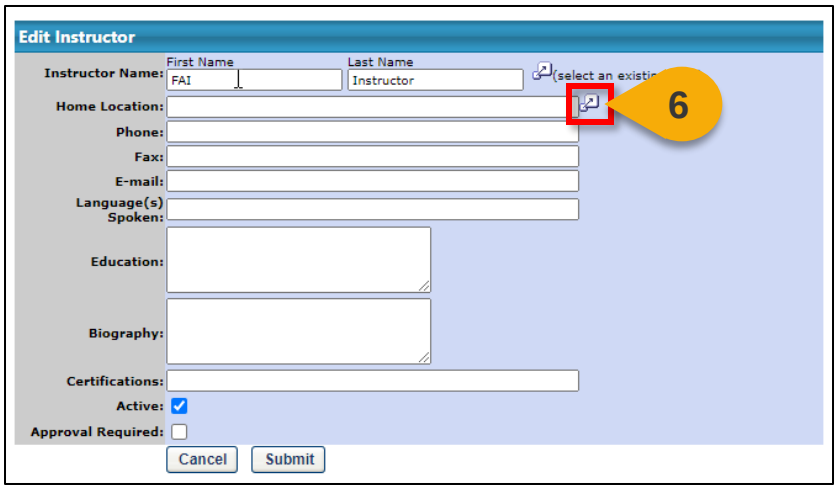


Add an External Instructor (Cont.1)

Step 5: Enter the Instructor's First Name and Last Name.

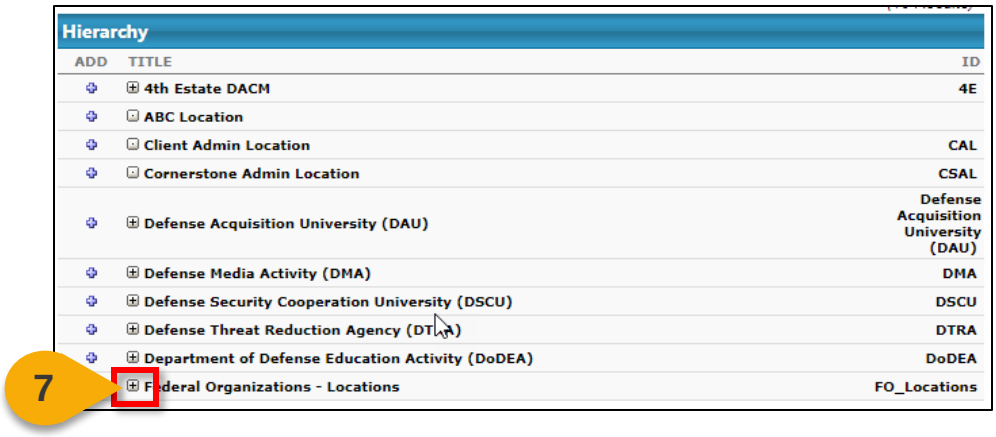


Step 6: Click the **pop out** next to **Home Location** to choose a location the Instructor will teach at.

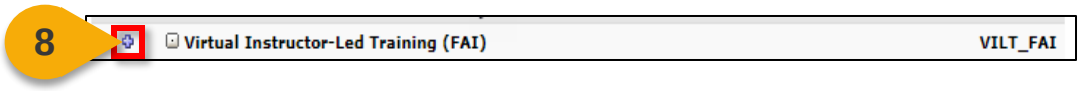


Add an External Instructor (Cont.2)

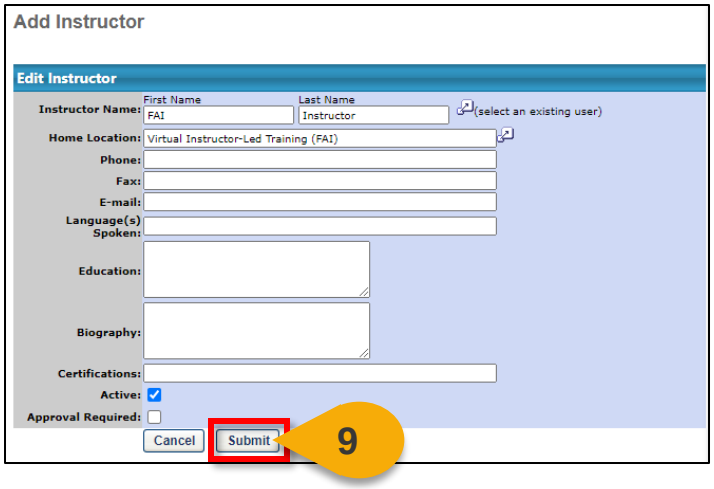
Step 7: A new window will open. Click on **the gray +** next to Federal Organizations – Locations to drill down to the location you would like to select.



Step 8: When you find the location you need, click the **blue +** next to it to select it.

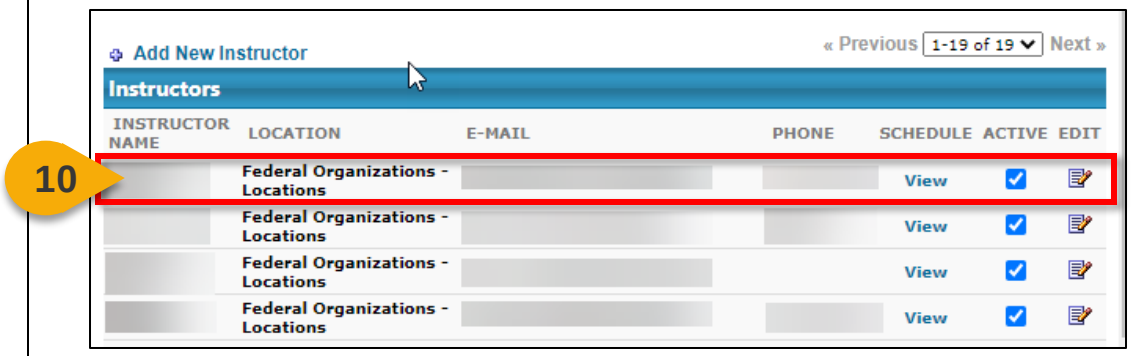


Step 9: The location will appear on the Edit Instructor panel on the Add Instructor page. You may fill in any additional information if desired. Then, click **Submit** to add the Instructor.



Add an External Instructor (Cont.3)

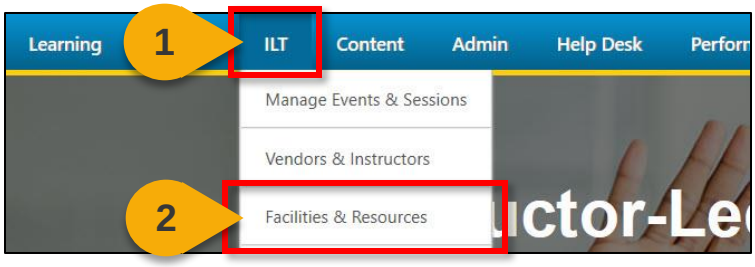
Step 10: You will be returned to the Instructor list for your location. You will be able to view and edit the Instructor you added.



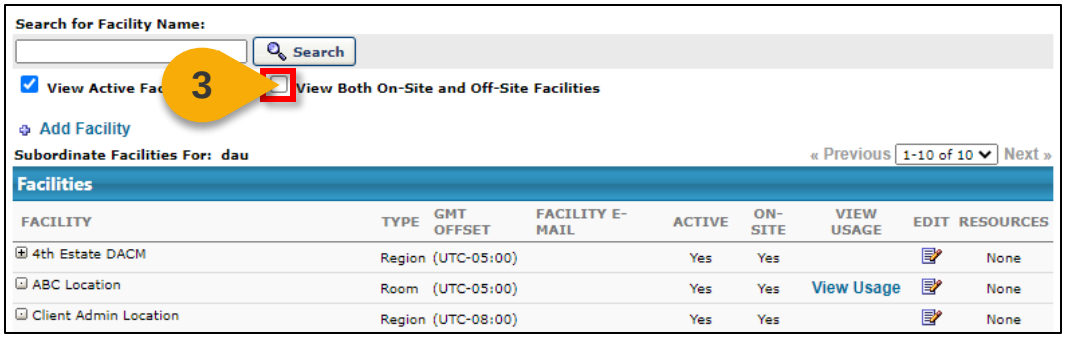
View Facilities for Your Schoolhouse

When you want to view available Facilities…

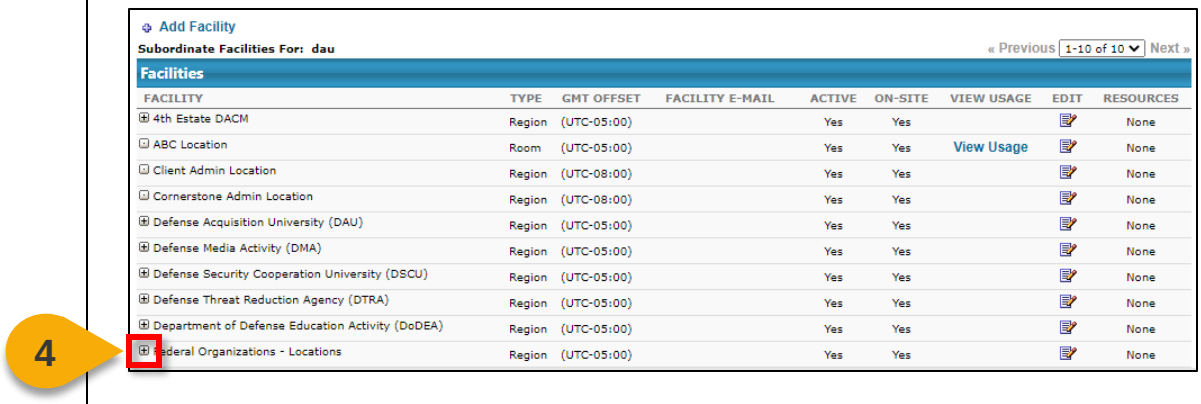
Steps 1 & 2: Hover of the **ILT** tab, then select **Facilities & Resources.**



Step 3: Select **View Both On-Site and Off-Site Facilities** to view both government and non-government Facilities that have been entered.

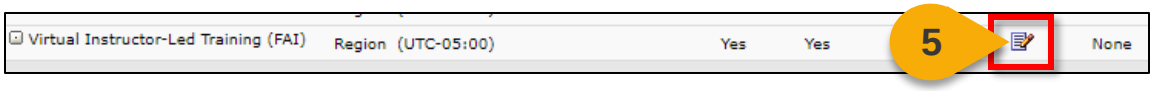


Step 4: On the Facilities and Resources page, click the **gray +** to drill down into Federal Organizations – Locations to the Facility you wish to view.

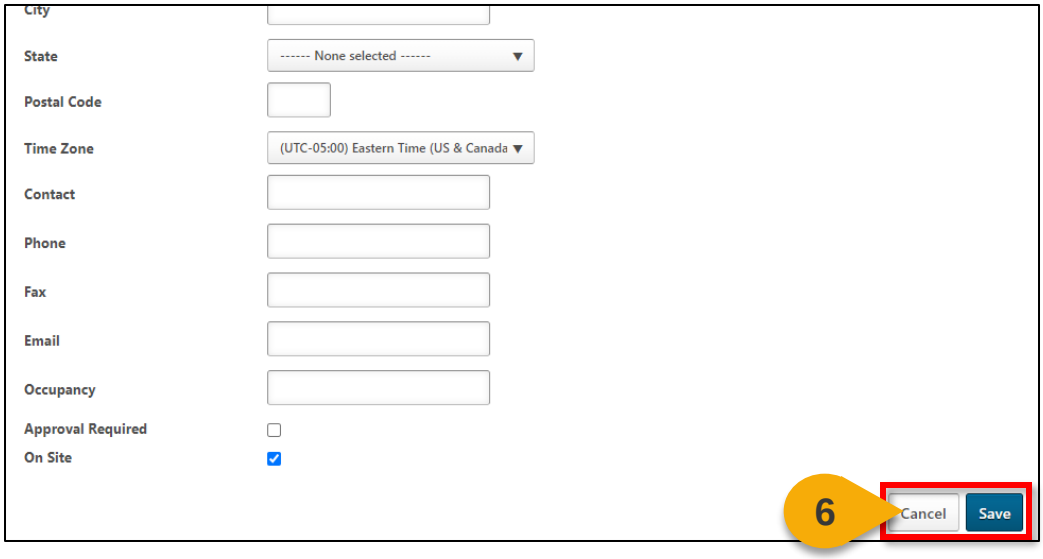


View Facilities for Your Schoolhouse (Cont.1)

Steps 5: Click **Edit** icon to view or edit the information for this Facility.



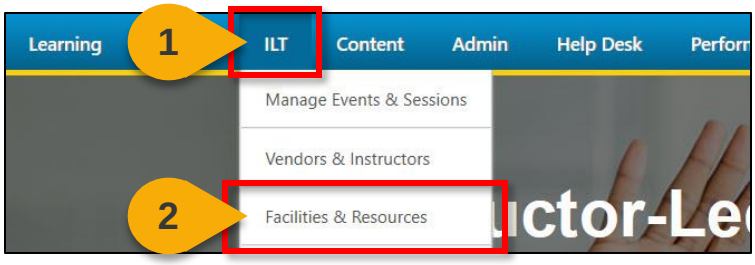
Step 6: View or edit the information for the Facility. Click **Save** to save any information you entered or **Cancel** to exit without saving any information.



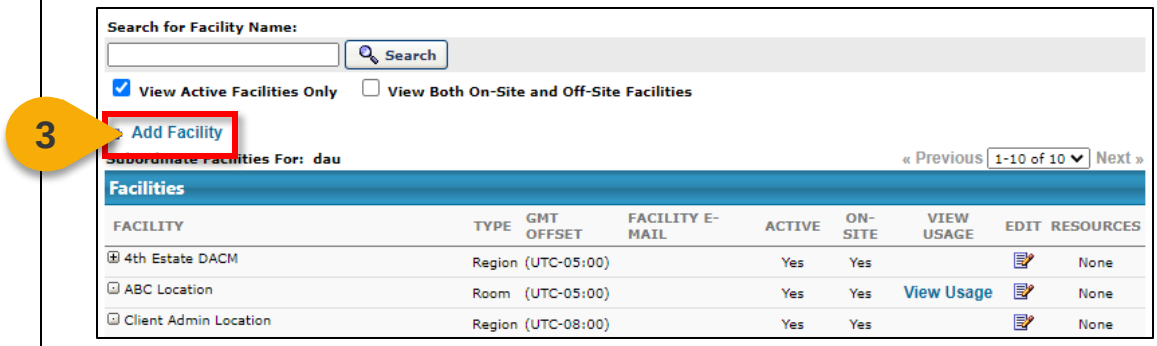
Add Facilities for Your Schoolhouse

When you want to add a Facility…

Steps 1 & 2: Hover of the **ILT** tab, then select **Facilities & Resources.**



Step 3: Click the **Add Facility** link.



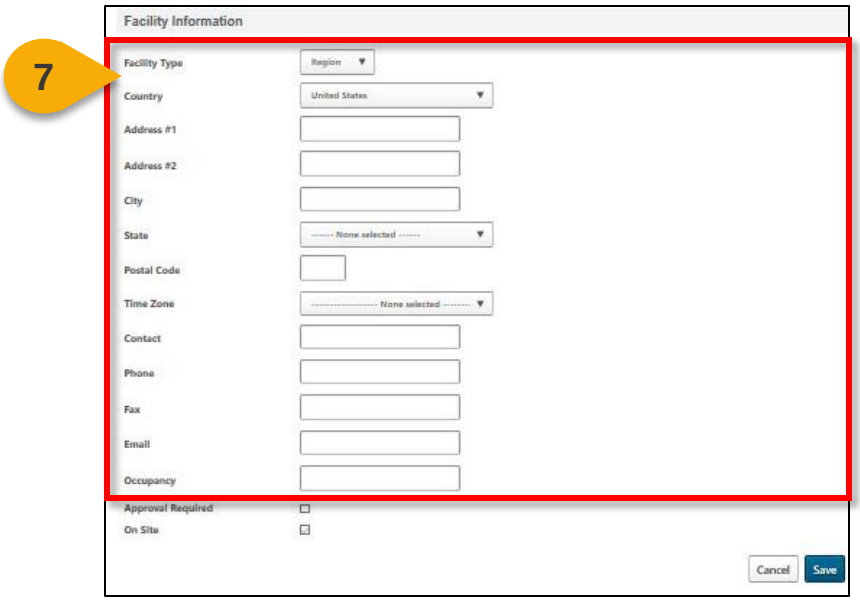
Step 4: The Create Location page will open. Note Locations and Facilities are used interchangeably in CSOD. In the Define Location section, enter the following information for the Facility/Location: **Name**, a unique **ID**, and a brief **Description**.

Add Facilities for Your Schoolhouse (Cont.1)

Step 5: In the Details Section, select a **Parent Location**. The Parent Location is the Location/Facility under which this new Location/Facility will appear. You may also choose an individual to be the **Owner** of this Location/Facility. This is optional.

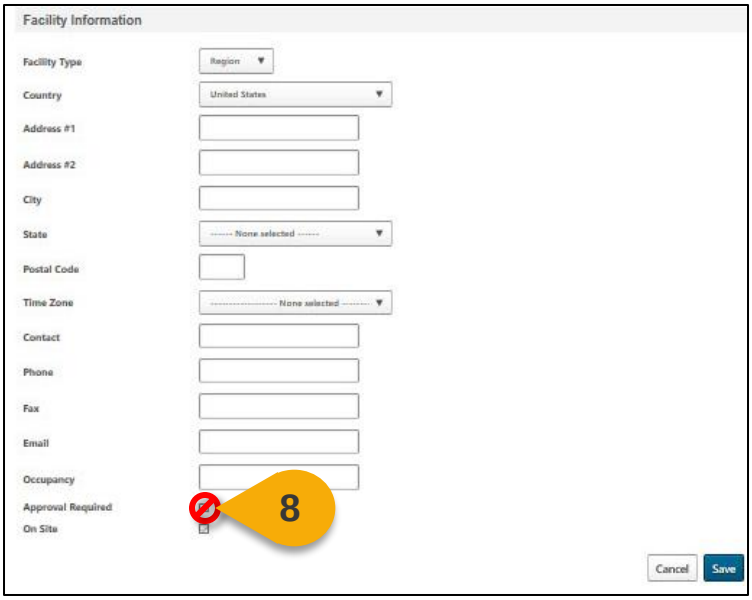
Step 6: Check the **Active** box to make this Facility/Location active in CSOD.

Step 7: In the **Facility Information** section, Enter as many details as you can to help students find this Facility/Location. Note: The only required field is Time Zone. If you decide to add Occupancy, you won't be allowed to add more registrations than the Occupancy number when creating a Session.

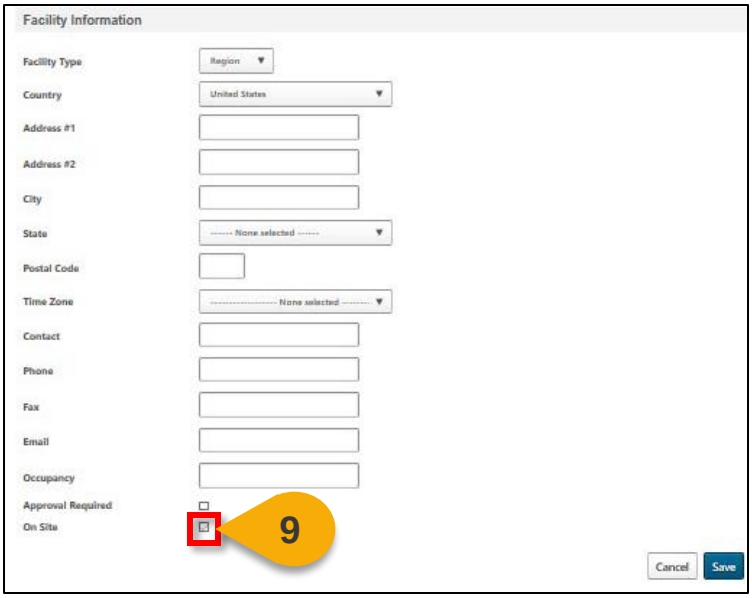


Add Facilities for Your Schoolhouse (Cont.2)

Step 8: Do not check the **Approval Required** box. The Federal Organizations are not using this CSOD feature.

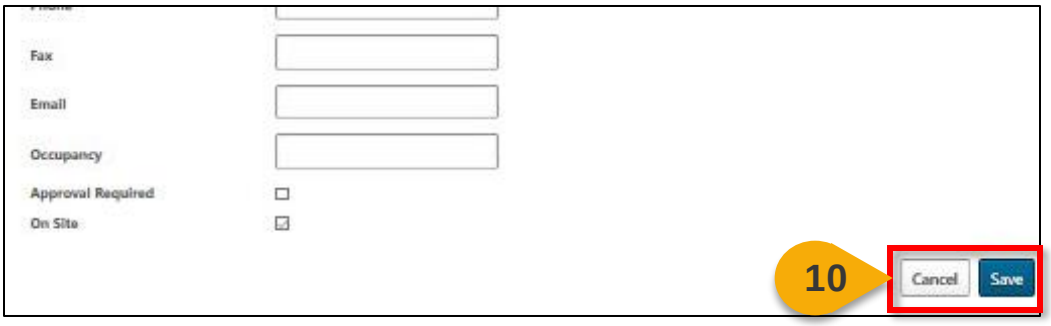


Step 9: Check the **On-Site** box if this is a government Facility/Location. Otherwise, leave this box unchecked.

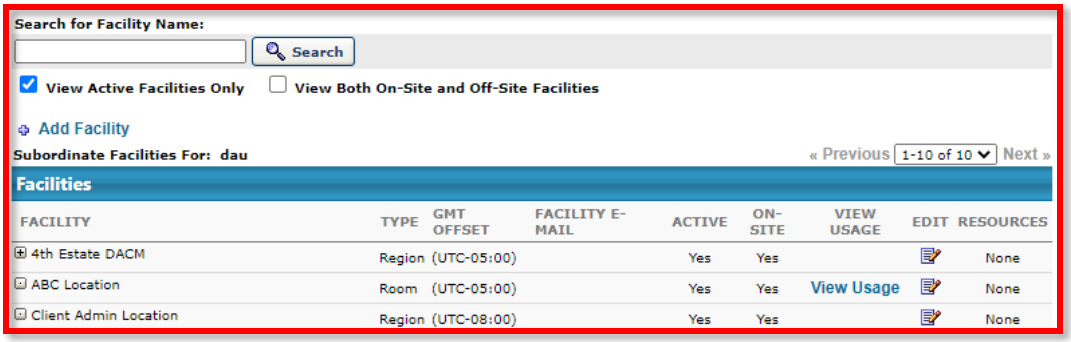


Add Facilities for Your Schoolhouse (Cont.3)

Step 10: Click **Save** to save the Facility/Location. Click **Cancel** to return to the Facility page without saving.



You will return to the main **Facilities** page. From here, you can search for and view the Facility/Location you just added or add another Facility/Location.

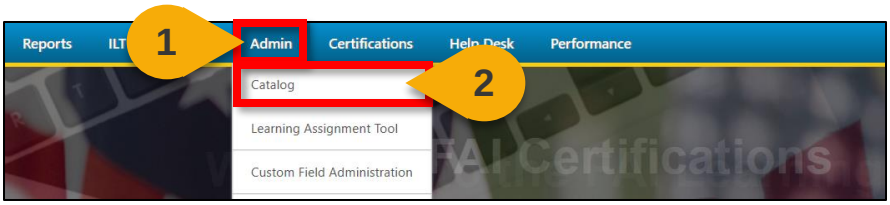


Online Training

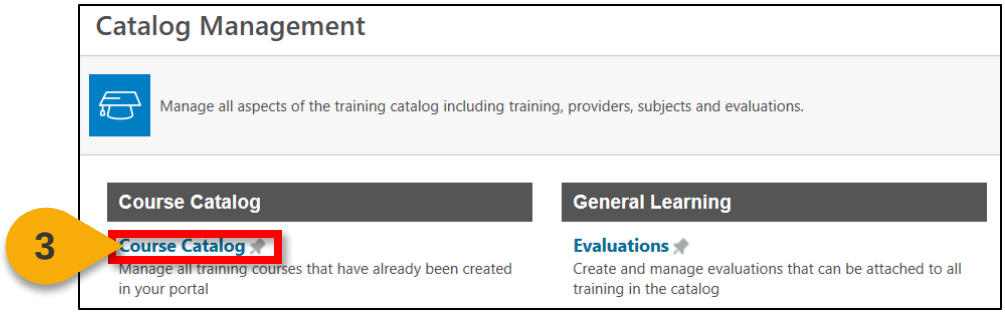
View Online Trainings in Catalog

When you want to view online training…

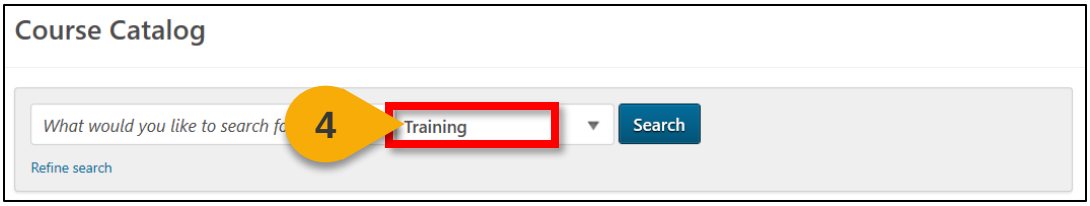
Steps 1 & 2: Go to **Admin,** then select **Catalog.**



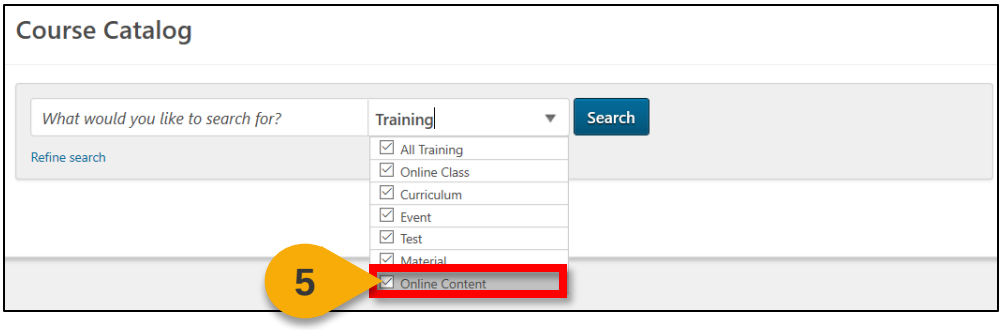
Step 3: Click on **Course Catalog.**



Step 4: After you enter the name of the course you are searching for click on the **Training dropdown** next to the search box**.**

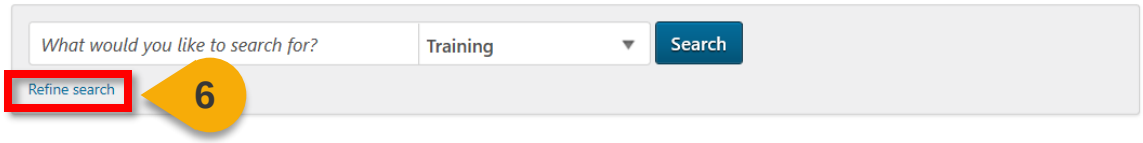


Step 5: Check the **Online Content box**.

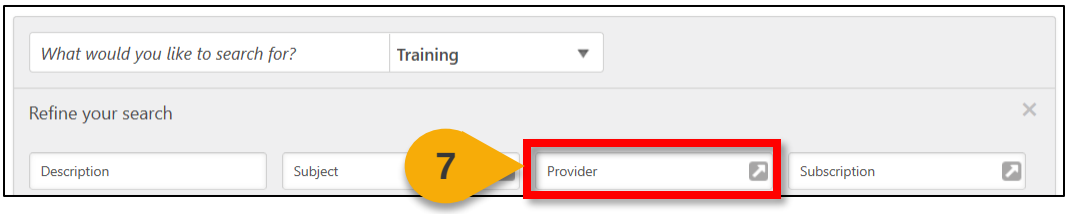


View OLT in Catalog (Cont.1)

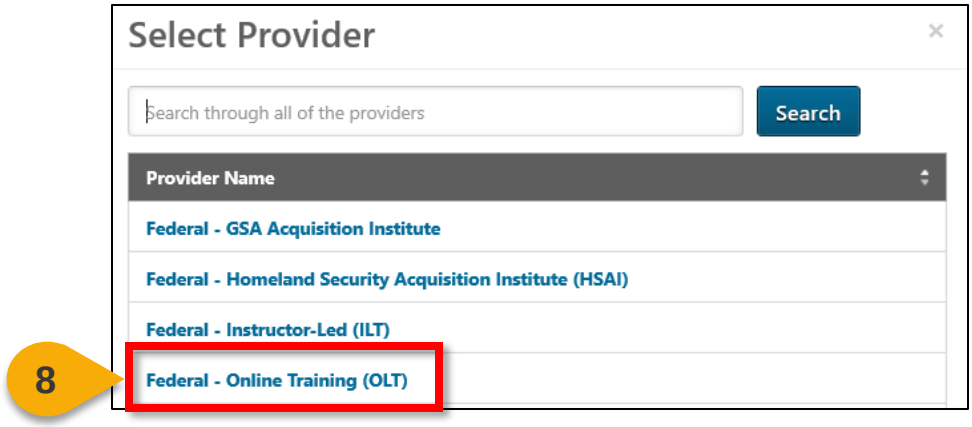
Step 6: Click on **Refine Search.**



Step 7: Click **Provider** to filter by Provider. You can follow the instructions below for filtering by Provider for any of the Refine your search fields.



Step 8: Select the **Provider** you wish to filter your search results by.

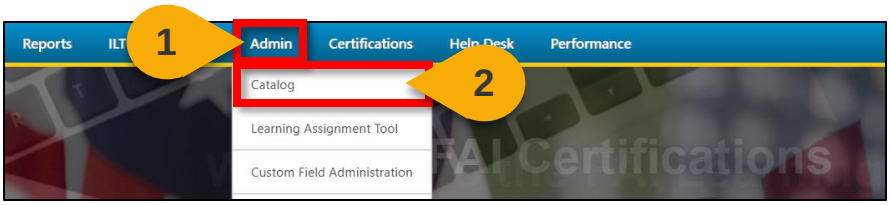


Step 9: Click **Search**. All relevant OLT will appear in the search results.

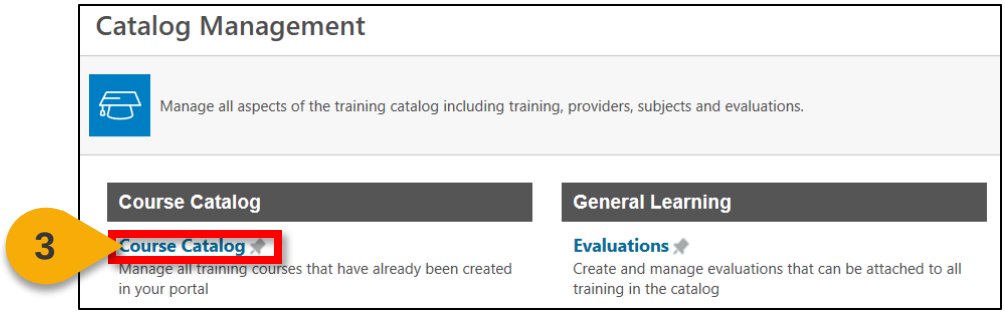
View Online Trainings in Catalog

When you want to view online training…

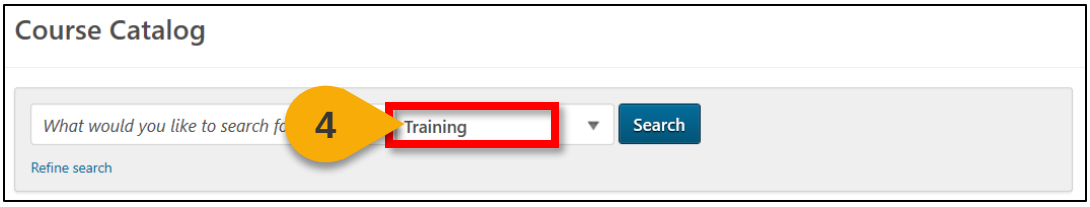
Steps 1 & 2: Go to Admin, then select Catalog.



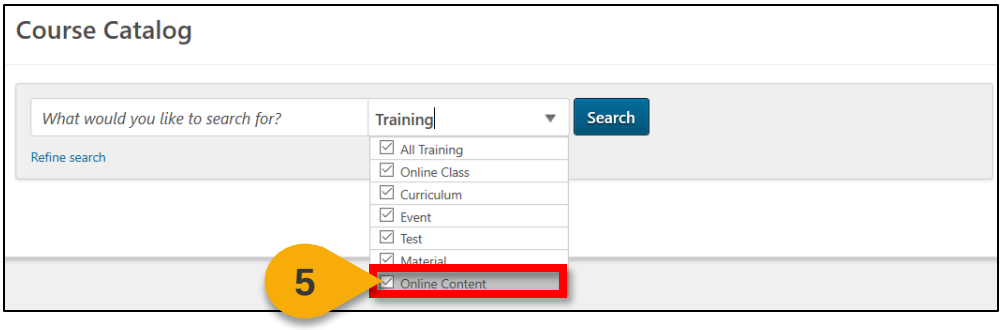
Step 3: Click on Course Catalog.



Step 4: After you enter the name of the course you are searching for click on the Training dropdown next to the search box.

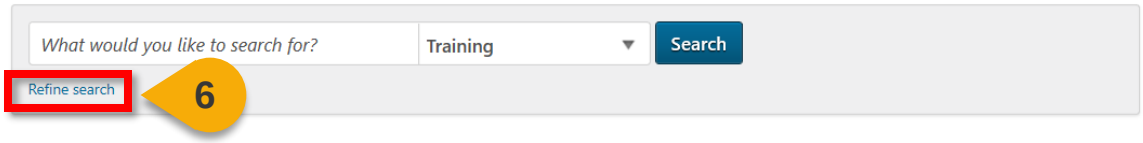


Step 5: Check the Online Content box.

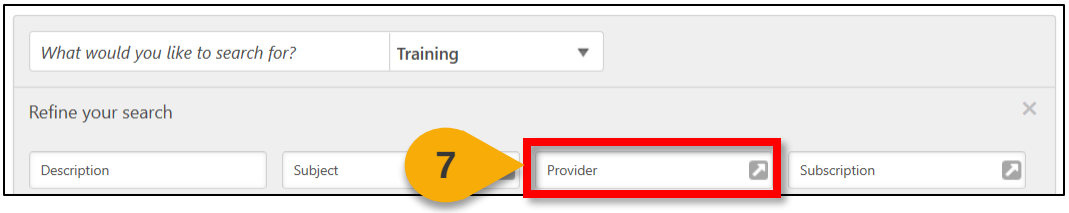


View OLT in Catalog (Cont.1)

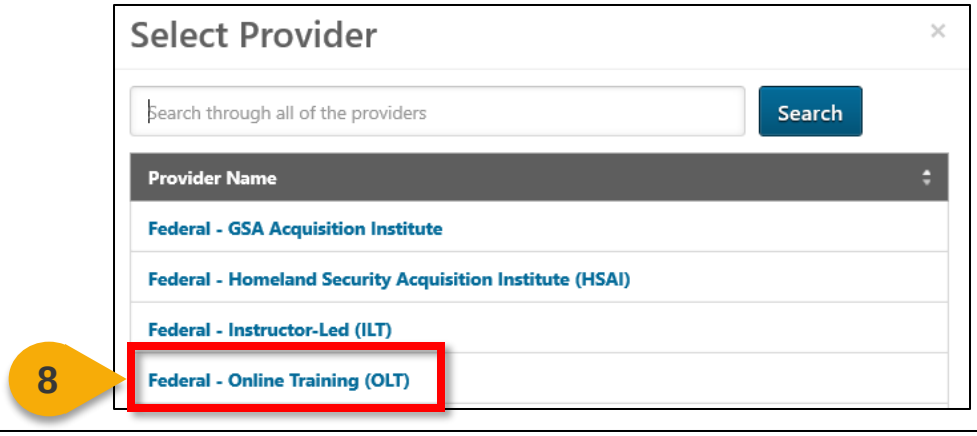
Step 6: Click on Refine Search.



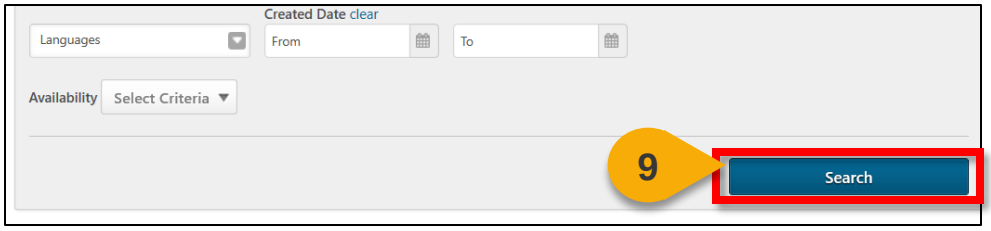
Step 7: Click Provider to filter by Provider. You can follow the instructions below for filtering by Provider for any of the Refine your search fields.



Step 8: Select the Provider you wish to filter your search results by.



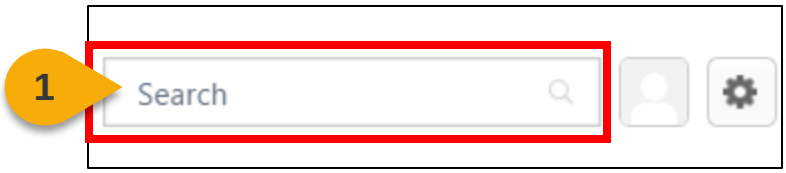
Step 9: Click Search. All relevant OLT will appear in the search results.



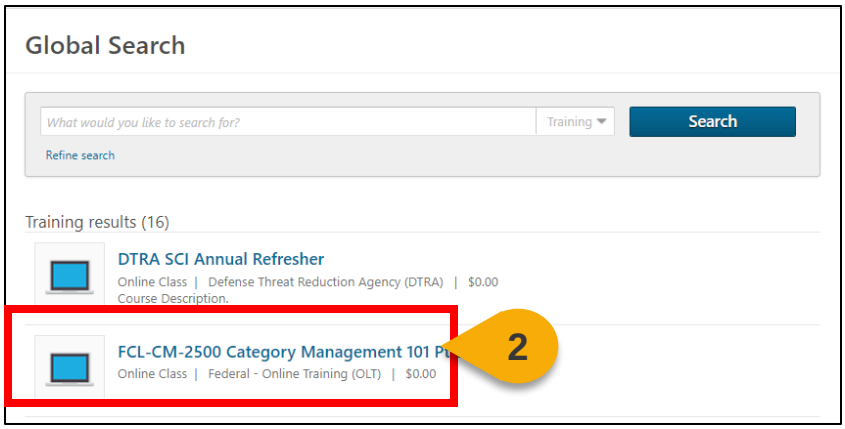
Assign Online Training (OLTs)

When you want to assign an online training to your subordinates…

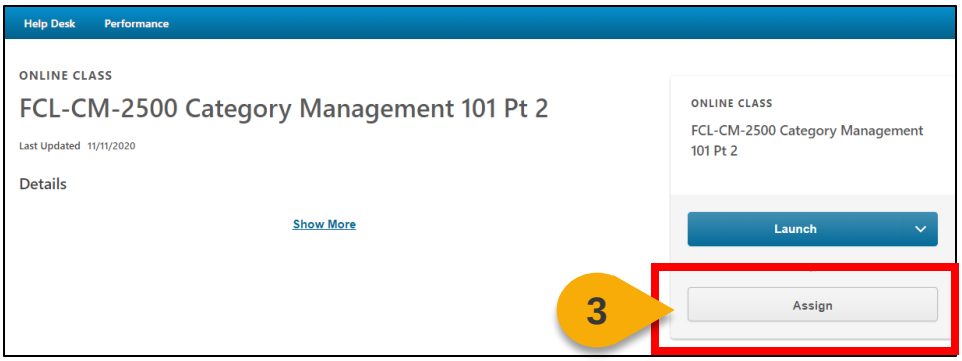
Step 1: Search for the online training that you would like to assign using Global Search.



Step 2: Select the **training** you wish to assign.



Step 3: Click **Assign.**

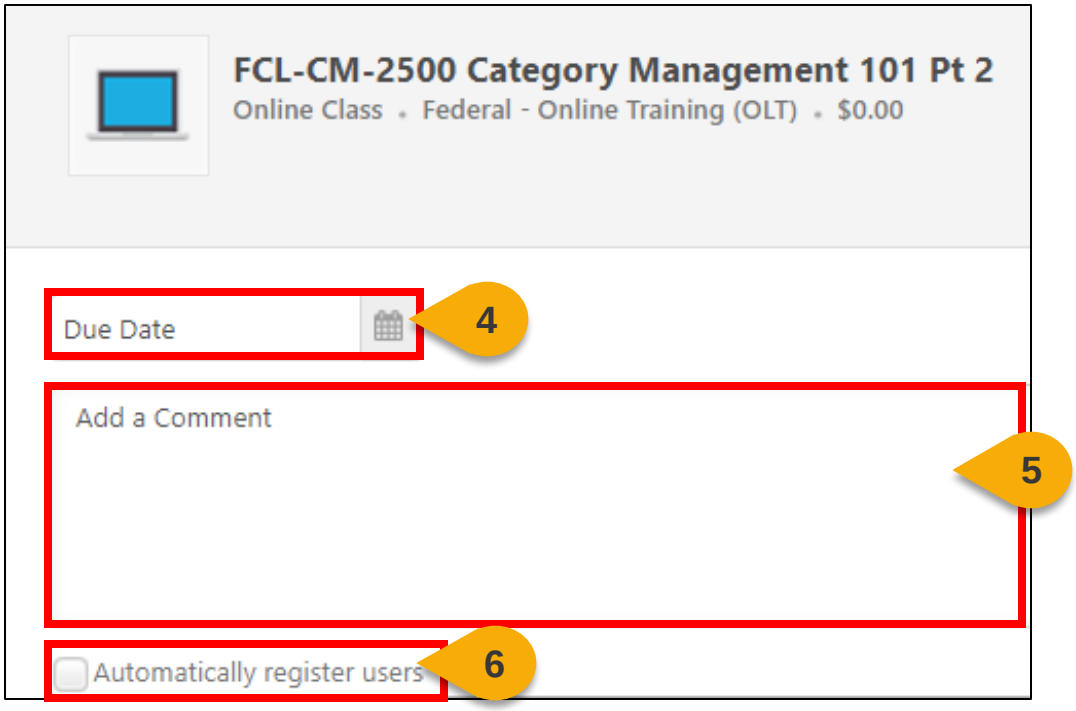


Assign OLTs (Cont. 1)

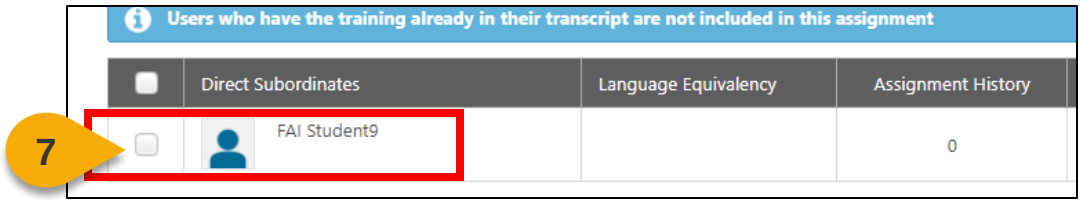
Step 4: Select a **Due Date** (if applicable) by clicking on the Calendar icon.

Step 5: Enter any comments in the **Comment box**.

Step 6: You can decide to automatically register subordinates into the ILT by click the **checkbox** next to "Automatically Registers Users" (recommended).

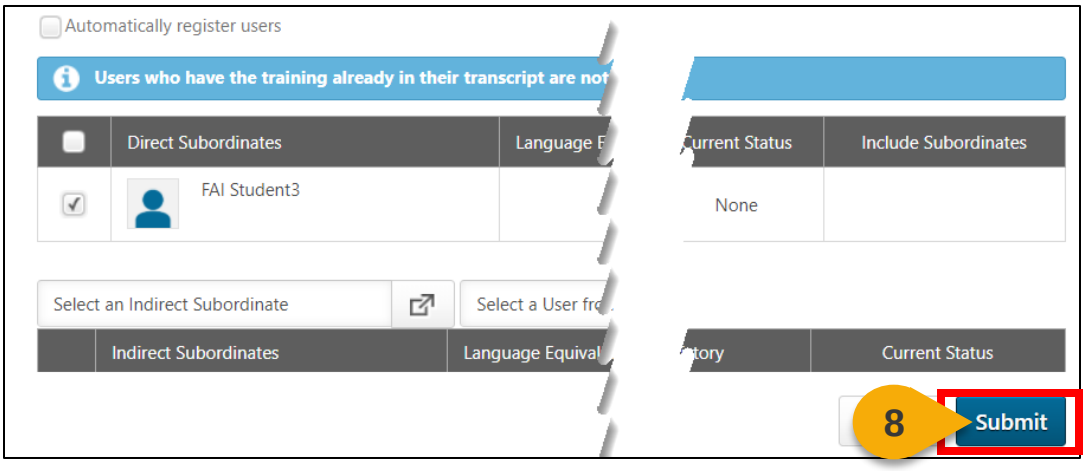


Step 7: Select the subordinates you want to assign the training to by marking the **checkbox** next to the name of the subordinate. You may assign to your direct and indirect subordinates.



Assign OLTs (Cont. 2)

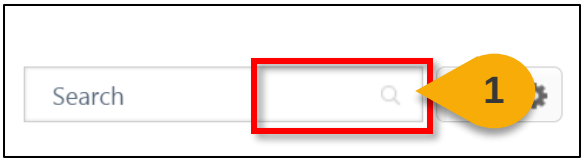
Step 8: Click the **Submit** button at the bottom of the page.



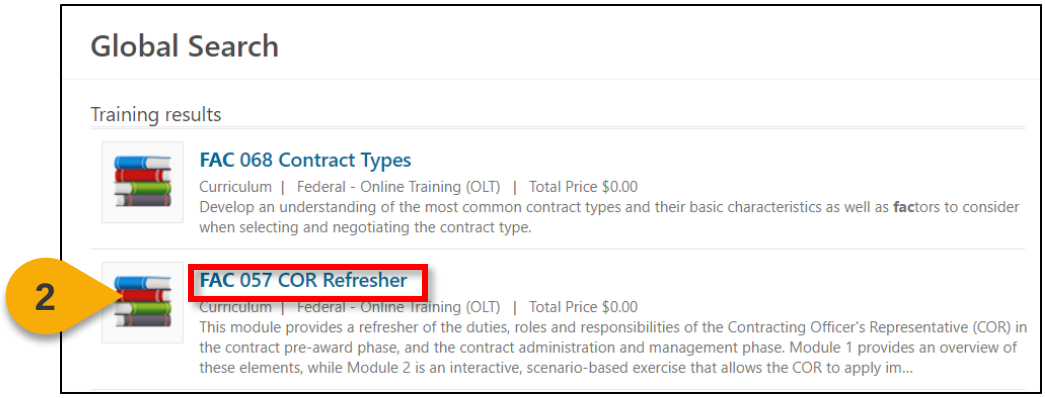
Register for Online Training (OLT)

When you want to register for Online Training…

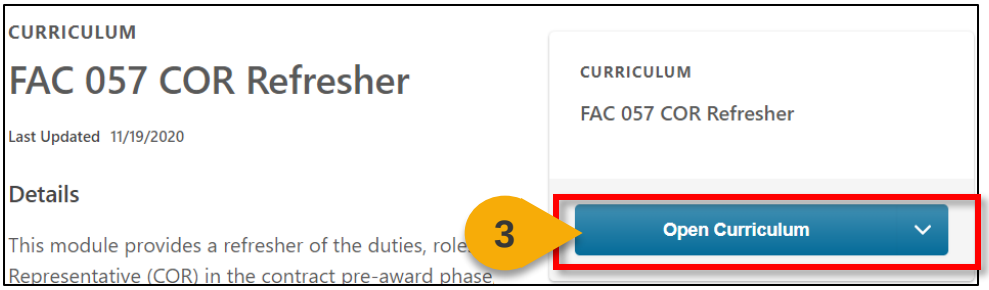
Step 1: Type the name of the OLT you would like to take into the Global Search box and click **the magnifying glass** or hit enter.

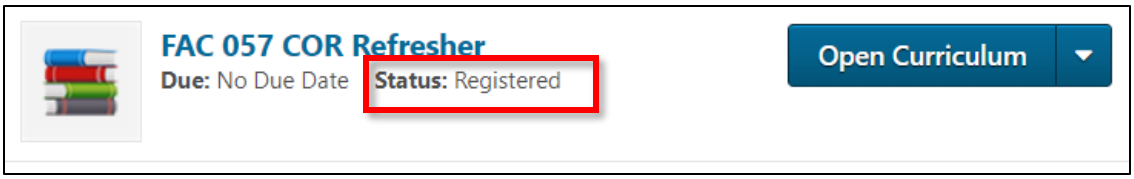


Step 2: Your search results will appear on the next page. Click the **title** of the OLT you would like to take.



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



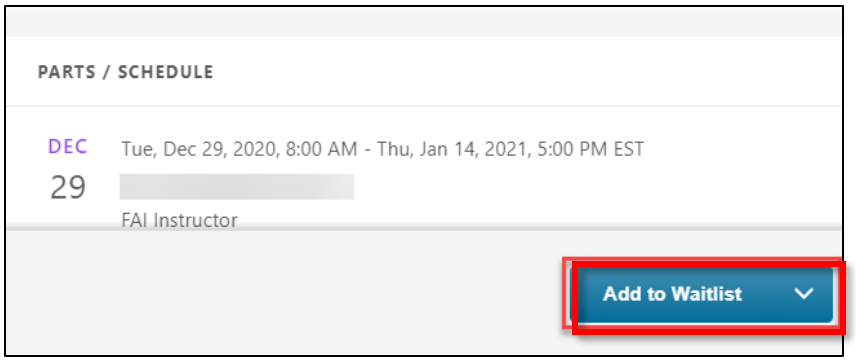


Submit an Exception Request

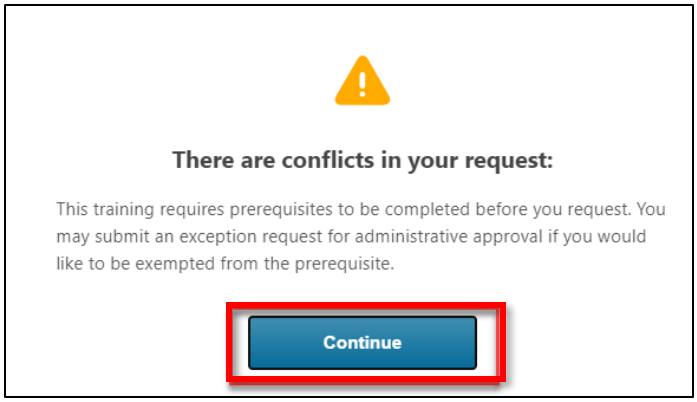
When you want to submit an Exception Request for a course prerequisite…

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

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



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

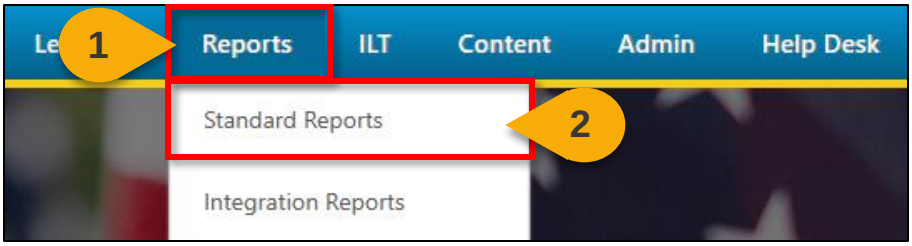


Step 3: The status for the session will change to **Exception Requested** on your transcript.

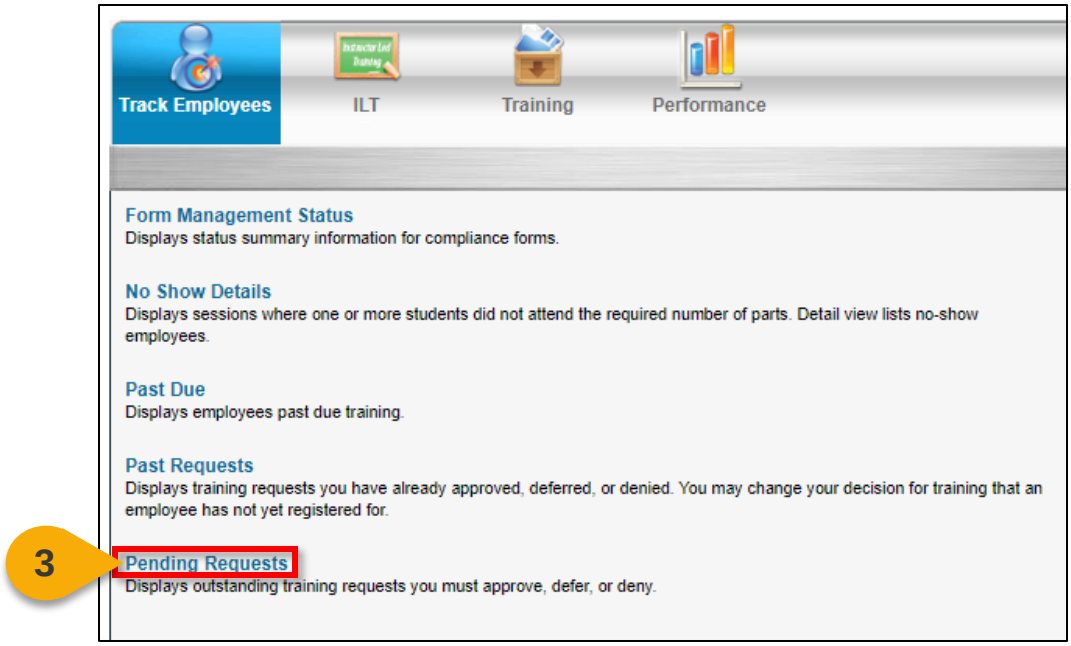
Approve Training Requests

When you want to approve training…

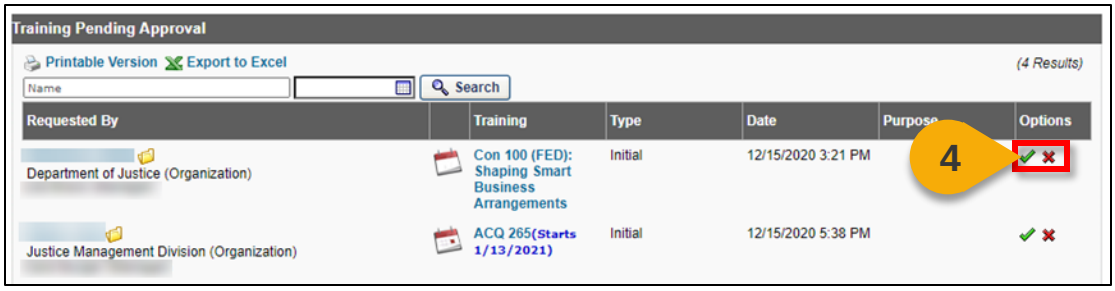
Steps 1 & 2: Navigate to the **Reports** tab and then click on **Standard Reports**.



Step 3: Click on the link for the **Pending Requests** report to view training requests.



Step 4: Click on the **red X** to deny the request. Click on the **green check** to approve.

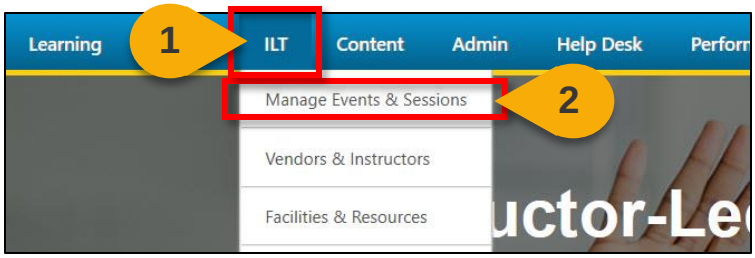


Sessions and Rosters

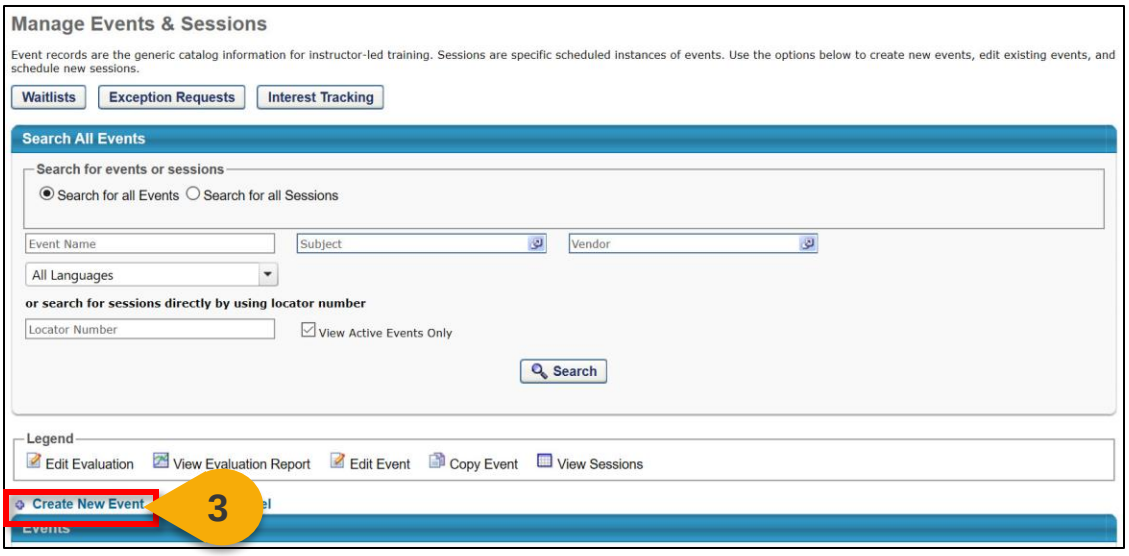
Create Event

When you want to create a new Event…

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



Step 3: Select **Create New Event.**

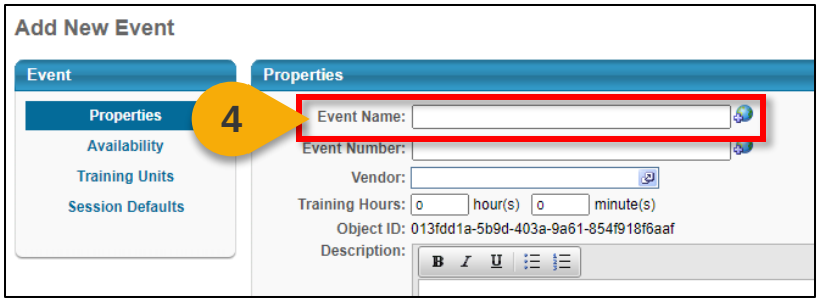


Note: When creating a session, the first step is to define a part for the session. *See Create Session - Parts Schedule - Define Part.*

Create Event (Cont.1)

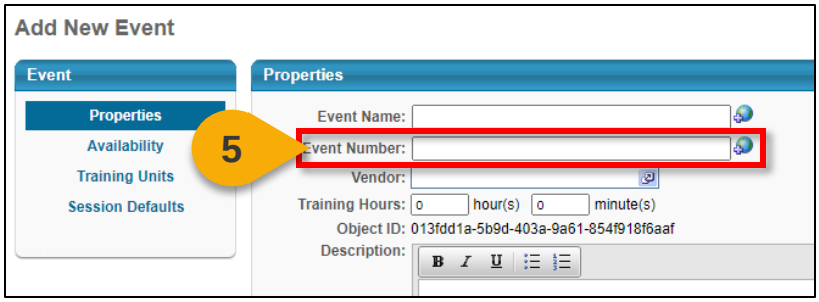
Step 4: In the Properties tab, add the **Event Name**. The Event Name is the name of the course, such as ACQ 265 (FED): Mission Focused Services Acquisition.

.



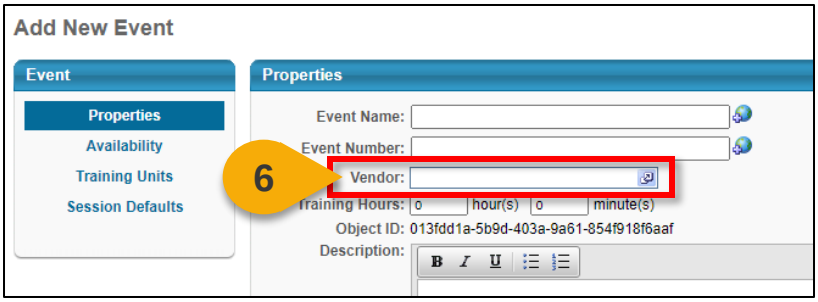
Step 5: Add the **Event Number**. The Event number can be similar to the Event name, for example, ACQ265(FED).

.



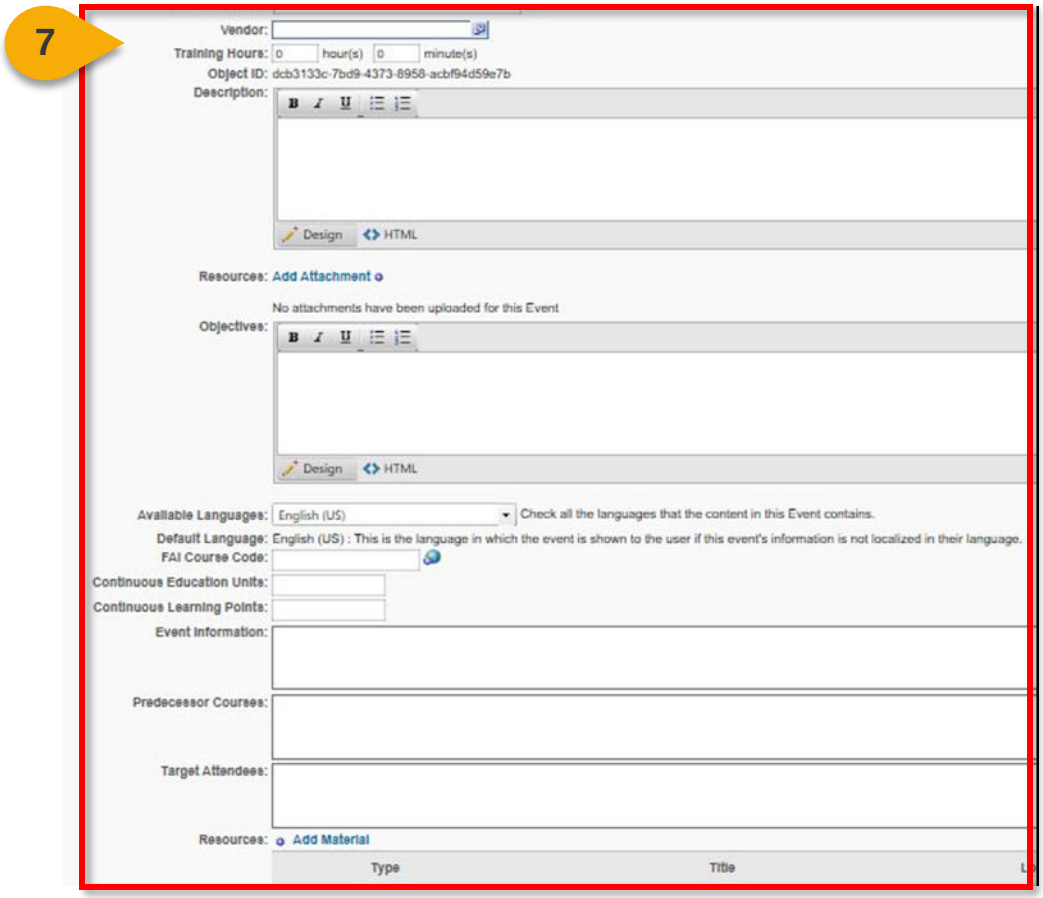
Step 6: Select a **Vendor** for the Event.

.

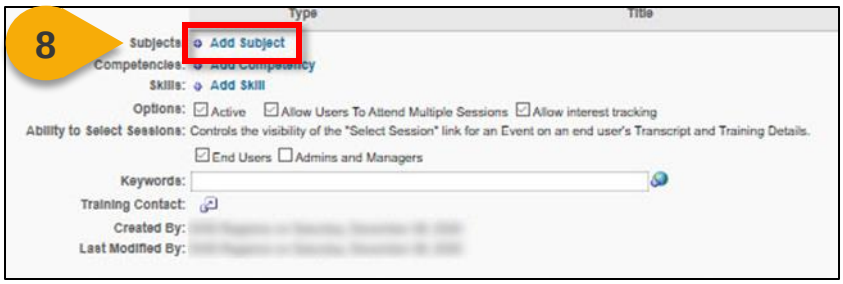


Create Event (Cont.2)

Step 7: Enter **additional information** as applicable. As a Federal Organizations Registrar, you will likely enter: Training Hours, Description, Objectives, FAI Course Code, Continuous Education Units, Event Information, and Target Attendees.

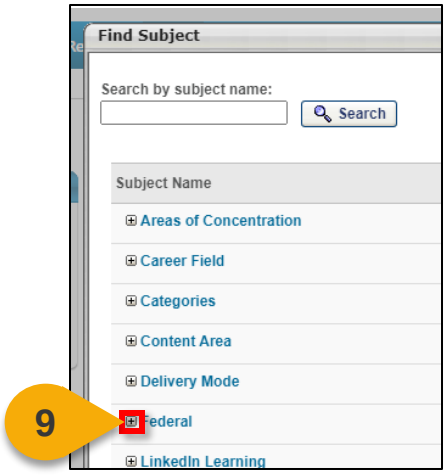


Step 8: Subjects is a required field. Select the **Add Subject** link.

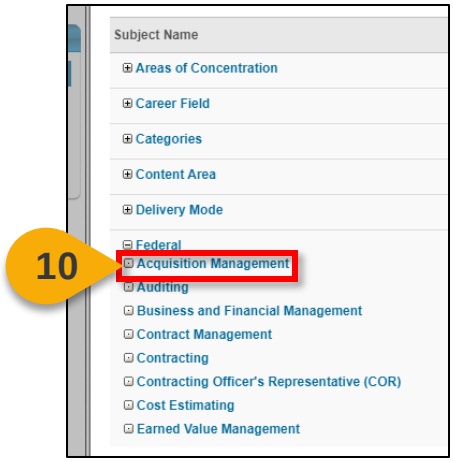


Create Event (Cont.3)

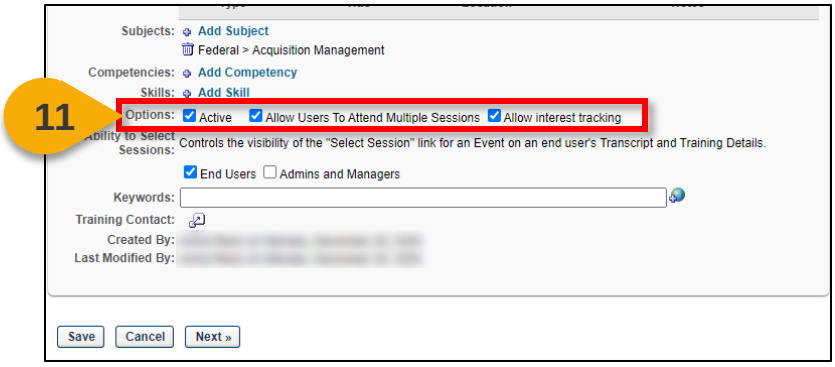
Step 9: Use the **gray +** to drill into Federal Subjects.



Step 10: Use the **blue link** to select the applicable Subject(s).

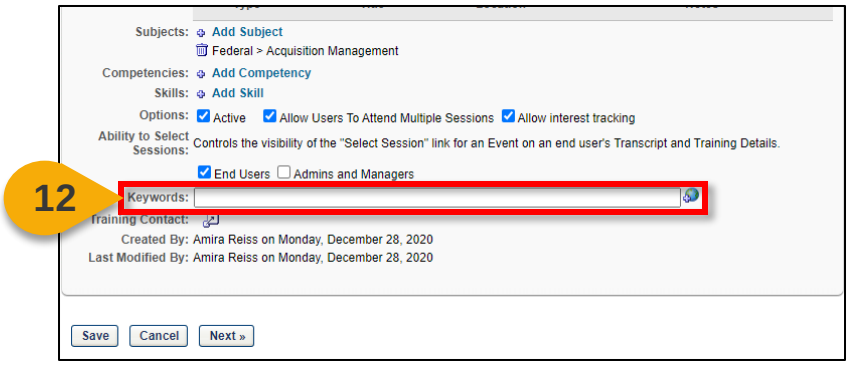


Step 11: The Subject will be added to the Event on the Event page. Ensure **Active** and **Allow Interest Tracking** are checked. Check **Allow Users To Attend Multiple Sessions** only if the Event is for Brown Bags.



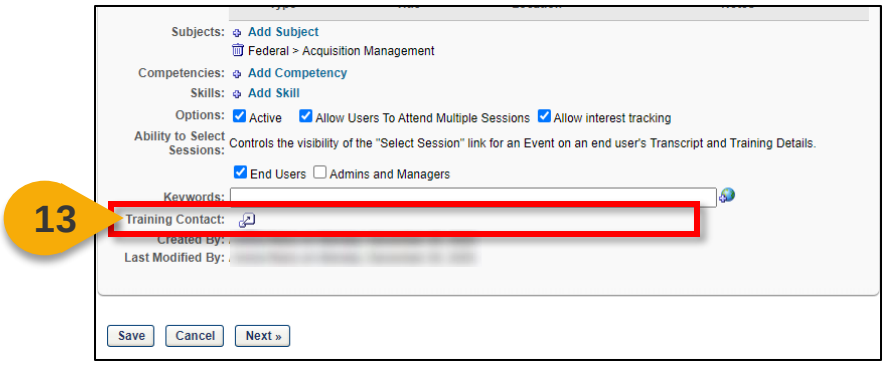
Create Event (Cont.4)

Step 12: Add **Keywords** if desired.

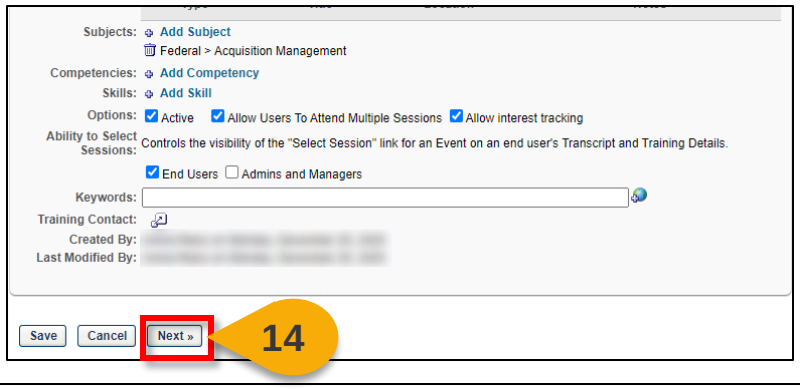


Step 13: Add a **Training Contact** for this Event if desired.

.

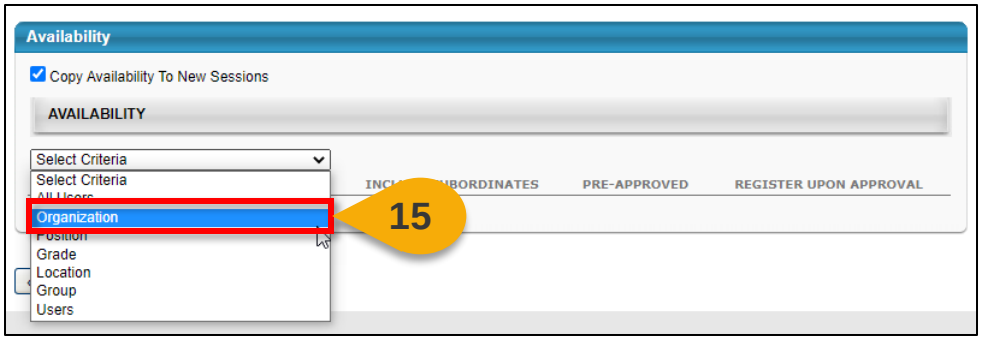


Step 14: Click **Next** to save this information and move to the Availability tab.

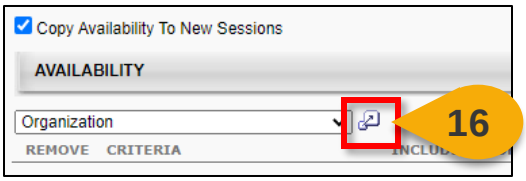


Create Event (Cont.5)

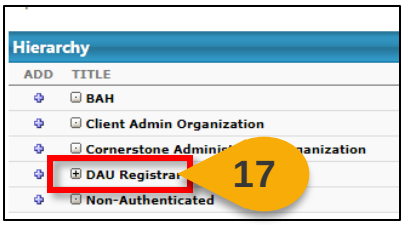
Step 15: In the **Select Criteria** drop down, click **Organization.**



Step 16: Click the **pop out** that appears next to the field**.**

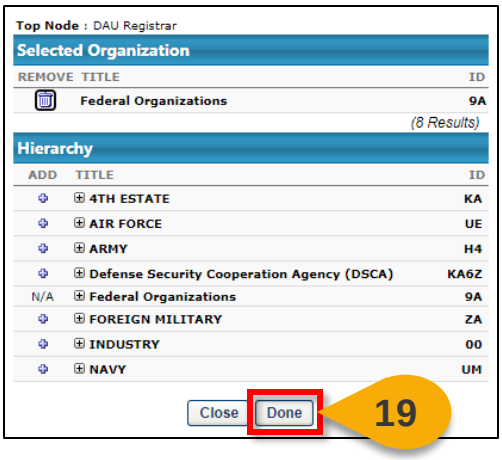


Step 17: Click the **gray +** next to DAU Registrar to drill down within the Organizations.



Step 18: Click the **blue +** next to Federal Organizations to make this event open to all Users within the Federal Organizations hierarchy or continue to drill down. Note: We will be able to set more restrictive availability when creating sessions.

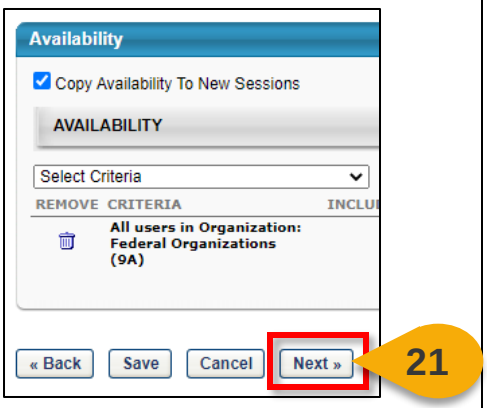
Step 19: Click the **Done** to add the availability.



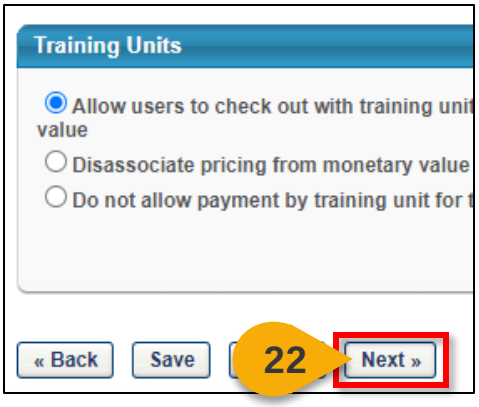
Create Event (Cont.6)

Step 20: Check the **Include Subordinates, Pre-Approved, and Register Upon Approval** boxes. These options will ensure that all Federal Organizations Users will see the Event, that users will not go through the workflow unless dictated in the Session, and that users will not need to register themselves after they are approved.

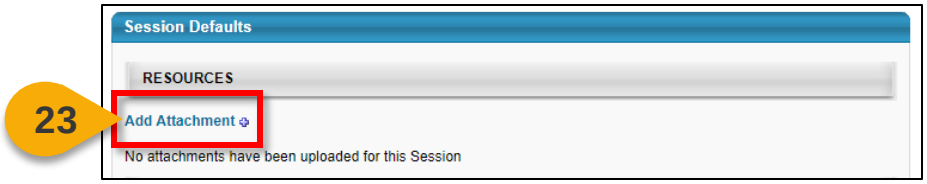
Step 21: Click **Next** to save the availability and move to the Training Units tab.



Step 22: You will not use the Training Units tab. Click **Next** to advance to the Session Defaults tab.

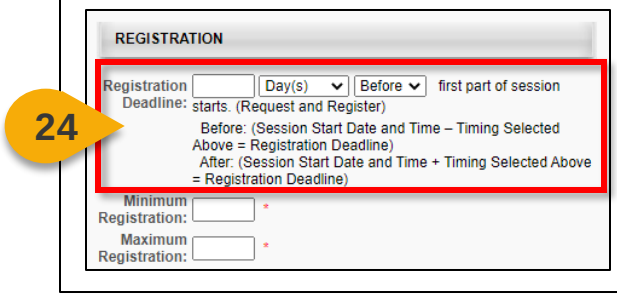


Step 23: Any information you enter in the Session Defaults will appear for all Sessions you create. You can set this information here if it is standard for as Sessions or set this information when creating Sessions. You can still edit the information in the Session. In the **Resources** section, add any attachments, if applicable.

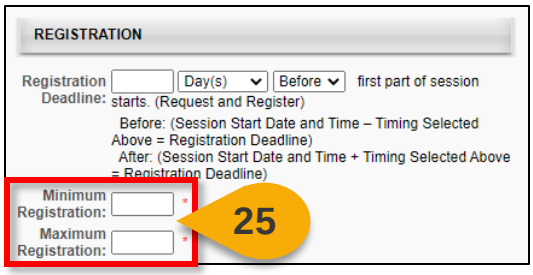


Create Event (Cont.7)

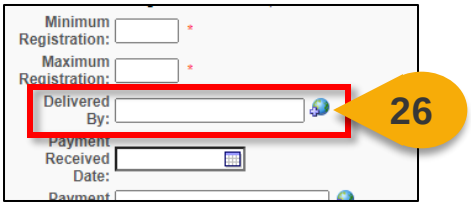
Step 24: In the Registration section, set the **Registration Deadline**. Is the amount of time before the Event you wish to allow no more Users to register.



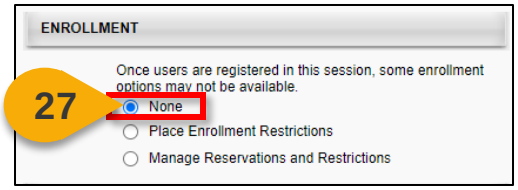
Step 25: Set the **Minimum Registration** and **Maximum Registration** for Sessions in this Event. These fields are required but can be updated at the Session level.



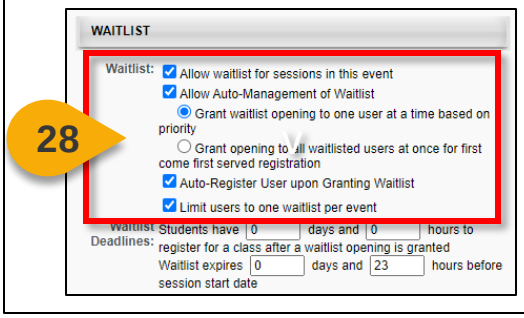
Step 26: If the same vendor is providing all instances of this training, enter this vendor in the **Delivered By** field.



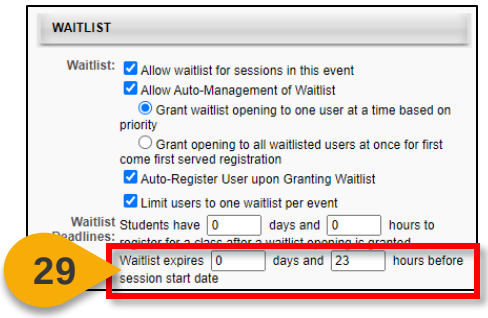
Step 27: In the Enrollment section, select **None**. You will set this when creating Sessions.



Step 28: In the Waitlist Section, ensure **Allow waitlist for sessions in this event**, **Allow Auto-Management of Waitlist**, **Grant waitlist opening to one user at a time based on priority**, **Auto-Register User upon Granting Waitlist**, and **Limit users to one waitlist per event** are all checked.



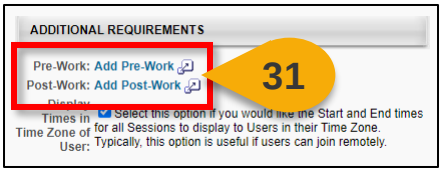
Step 29: Set the **Waitlist Expiration** for this Event, if applicable.



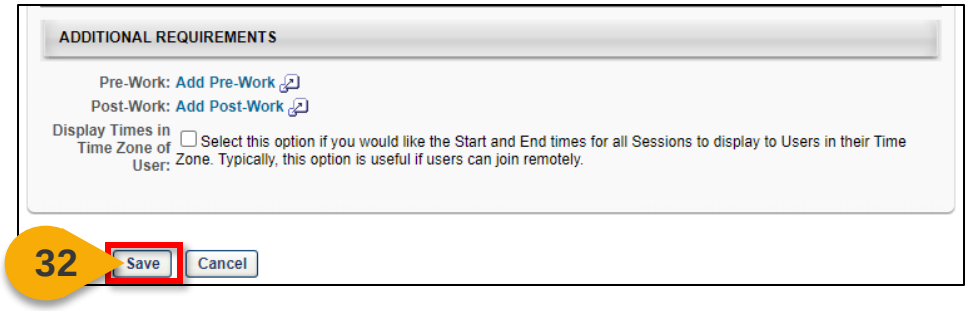
Create Event (Cont.8)

Step 30: Move to the Prerequisites section. Add Prerequisites if applicable by selecting Add New Option. The prerequisite must be in CSOD to be selected.

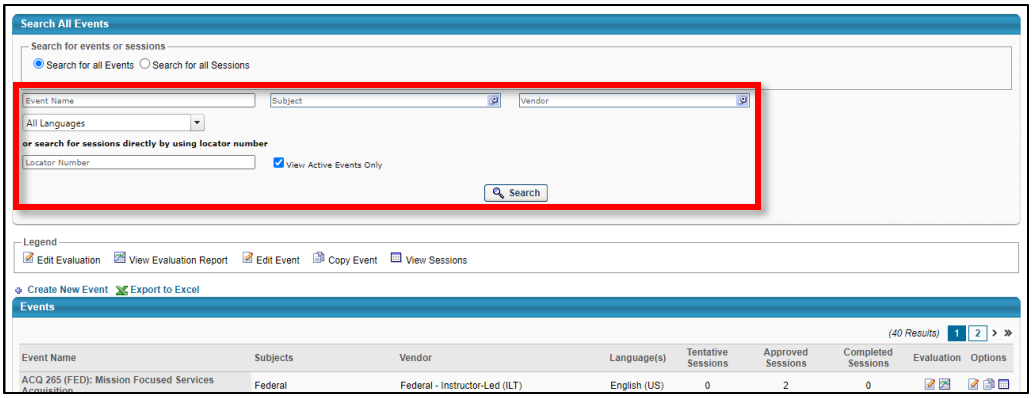
Step 31: Move to the Additional Requirements section. **Add Pre-Work** or **Add Post-Work** if applicable.



Step 32: Click **Save** to save this Event.



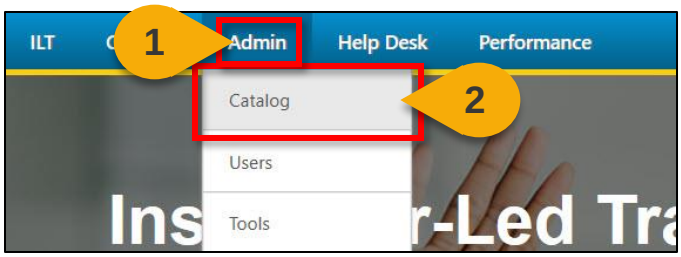
You will be returned to your Manage Events & Sessions page. From here, you can search for and view the Event you created.



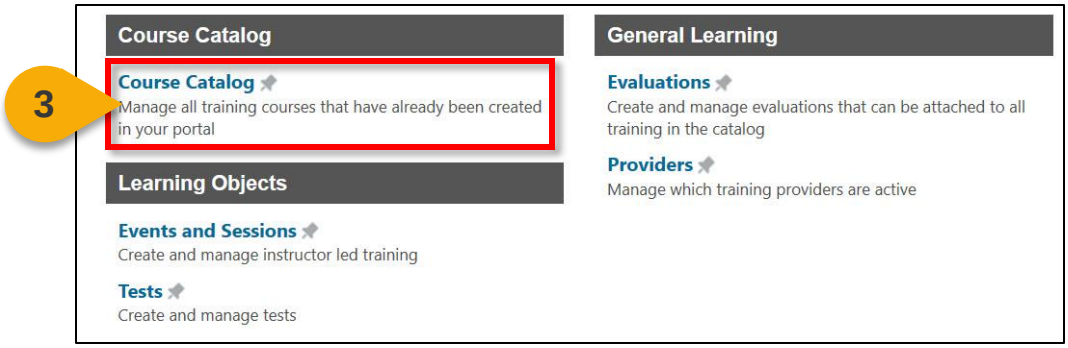
Edit Event

When you want to edit an Event…

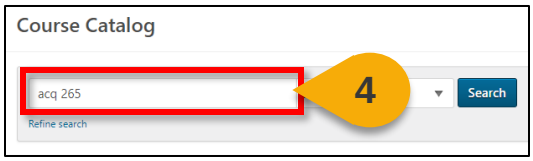
Steps 1 & 2: Hover over the **Admin** tab, then select **Catalog.**



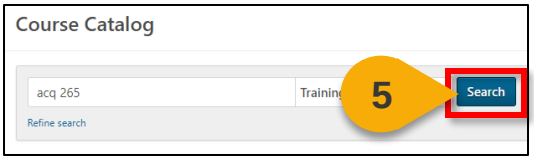
Step 3: Click on **Course Catalog** under Course Catalog heading.



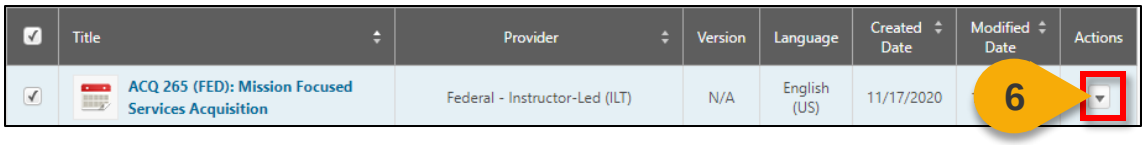
Step 4: Enter the name of the Event you are looking for into the **search field**.



Step 5: Click **Search.**

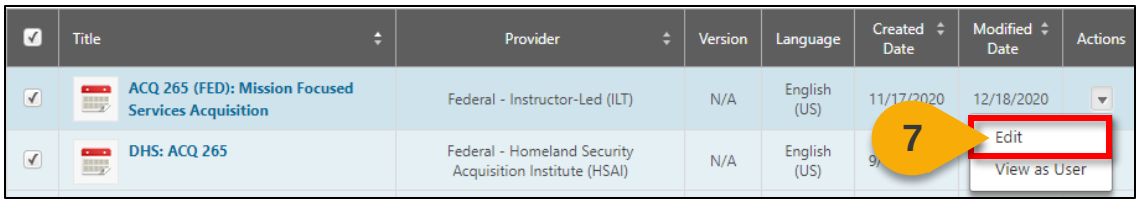


Step 6: Click the **arrow** in the Actions column to the right of the Event name.

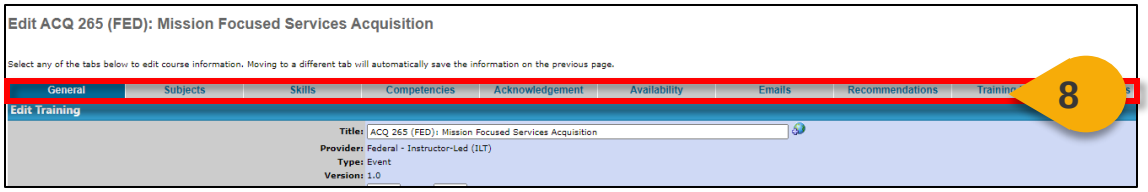


Edit Event (Cont.1)

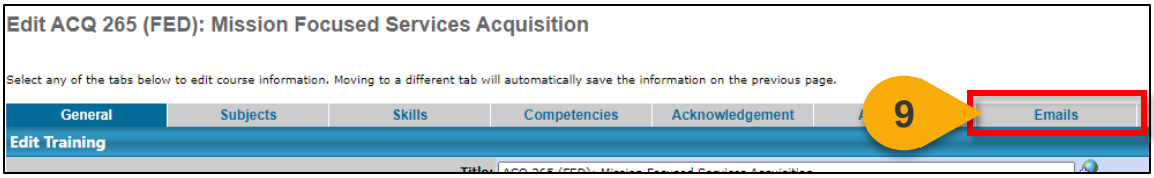
Step 7: Choose **Edit** from the dropdown menu.



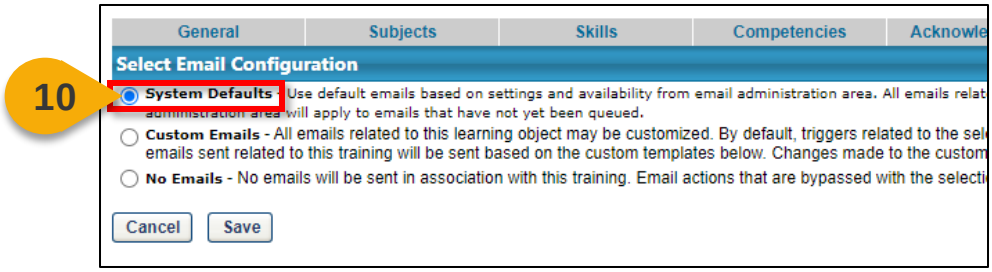
Step 8: Use the **tabs** along the top of the page to edit different elements of this Event.



Step 9: To edit the emails that are sent for this Event, click the **Emails** tab.

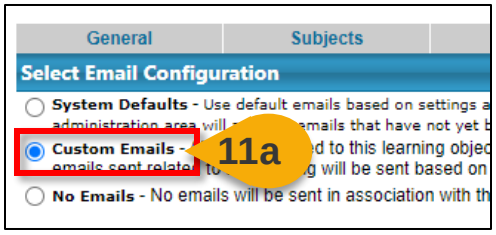


Step 10: Select **System Defaults** to send the default emails authored for all Federal Organizations.

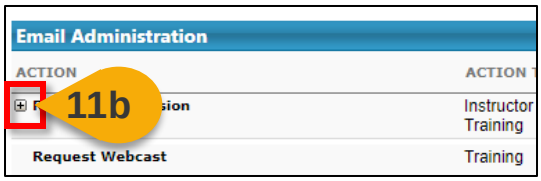


Edit Event (Cont.2)

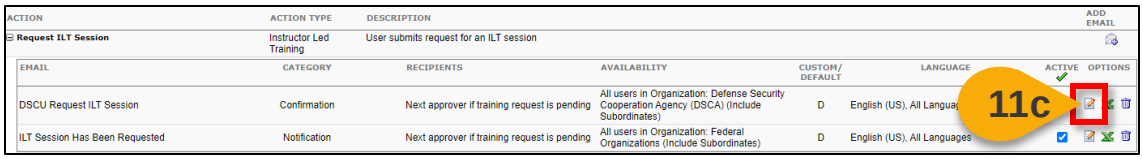
Step 11a: Select **Custom Emails** to edit the emails sent for this Event.



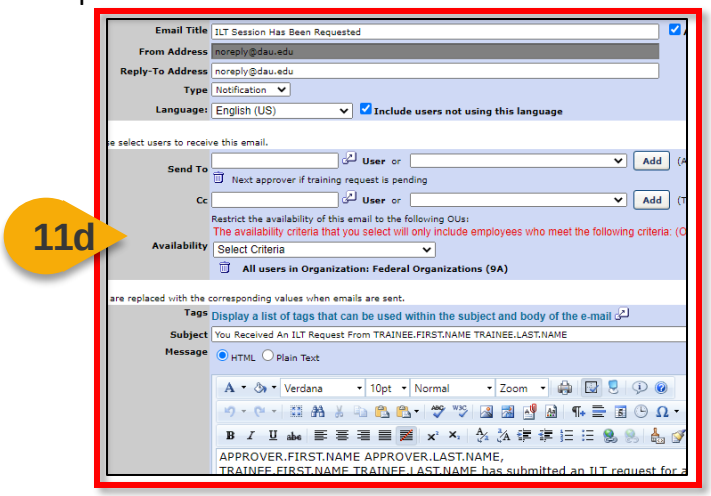
Step 11b: A panel will open in the bottom portion of the page. Click the **gray x** next to the email you wish to edit.



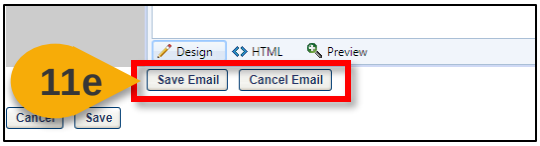
Step 11c: Click **Edit** in the Option column to edit the email.



Step 11d: Make required edits to the email.

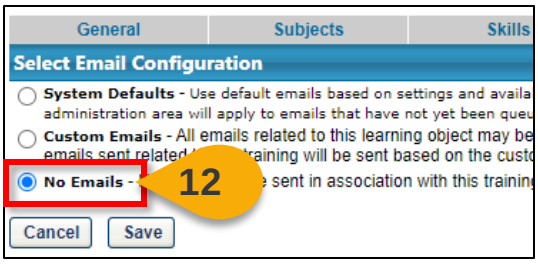


Step 11e: Click **Save Email** to save the email and return to the Email tab. Click **Cancel Email** to return to the Email tab without saving.

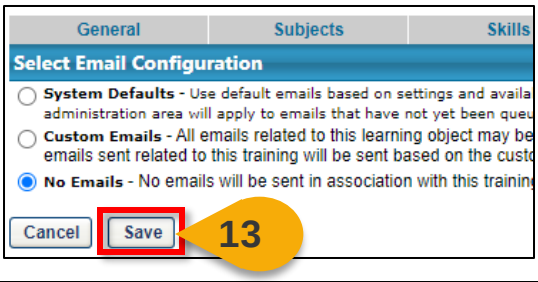


Edit Event (Cont.3)

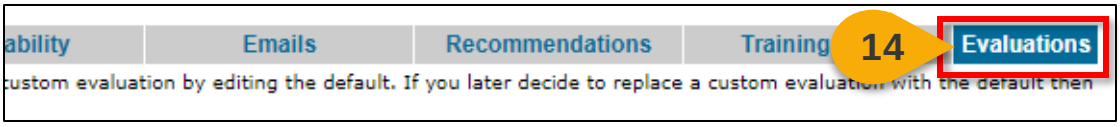
Step 12: To turn off Emails for this Event, select **No Emails**.



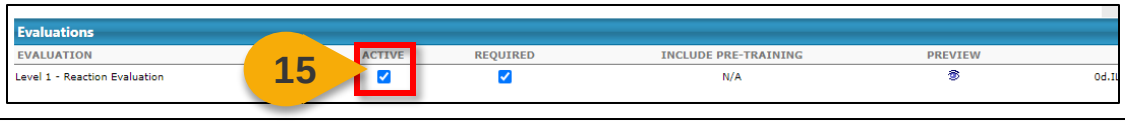
Step 13: Click **Save** or navigate to another tab to save your email choices.



Step 14: To update the Evaluation used for this Event, click the **Evaluations** tab.

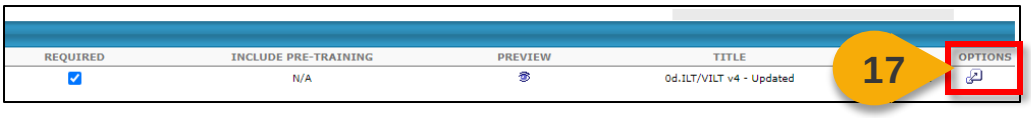


Step 15: Check the box in the **Active** column to activate Level 1 Evaluation for this Event.



Step 16: Check the box in the **Required** column to require Users complete Evaluation for this Event.

Step 17: Click the **pop out** in the Options column to select the Evaluation for this Event.

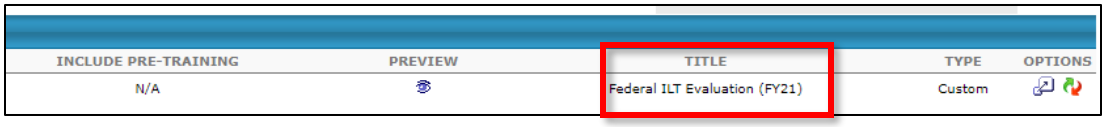


Edit Event (Cont.4)

Step 18: Click the **blue +** next to the Evaluation you wish to use for this Event.

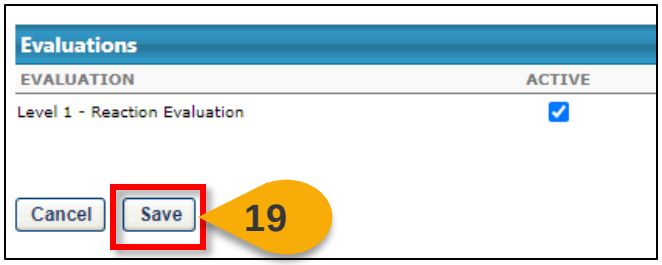
End of Course Evaluation OLT	English (US)	9/24/2018 10:15:57 AM	9/24/2018 10:16:38 AM
Federal ILT Evaluation (FY21)	English (US)	9/25/2020 5:00:12 PM	11/3/2020 12:30:05 PM
Federal OLT Evaluation (FY21)	English (US)	9/25/2020 2:30:00 PM	11/3/2020 12:30:55 PM
FPD End of Course Evaluation (ILT/VILT) 2	English (US)	10/30/2018 1:10:19 PM	12/19/2018 3:16:26 PM

You will be returned to the Evaluations tab. You can view the Evaluation you chose under the **Title** column.



INCLUDE PRE-TRAINING	PREVIEW	TITLE	TYPE	OPTIONS
N/A		Federal ILT Evaluation (FY21)	Custom	

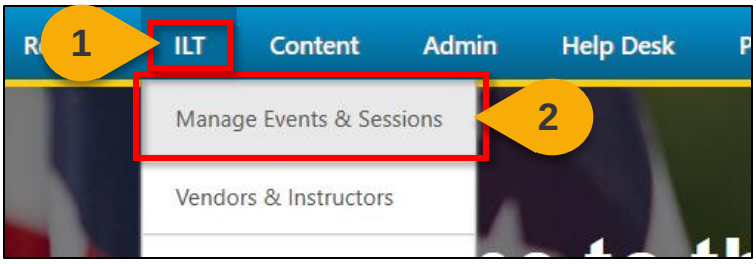
Step 19: Click **Save** or navigate to another tab to save these changes.



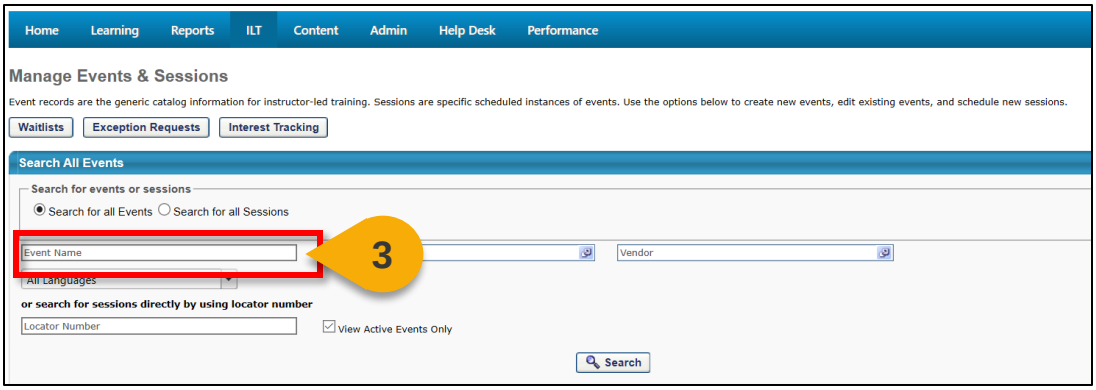
Create Sessions

When you want to create a Session…

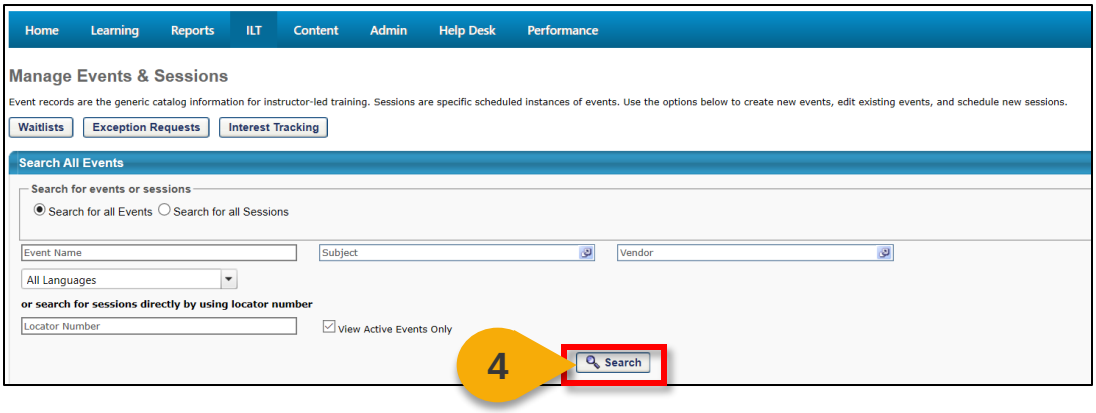
Steps 1 & 2: Hover over the **ILT** tab, then select **Manage Events & Sessions.**



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

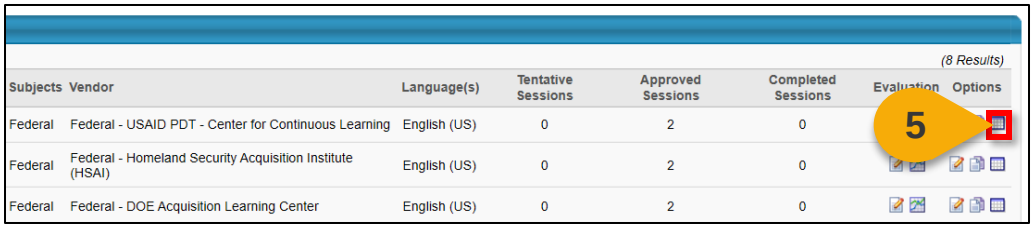


Step 4: Click **Search** or hit **Enter.**

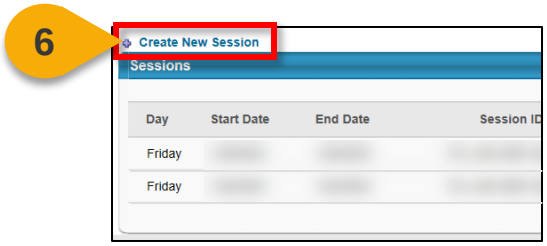


Create Sessions (Cont.1)

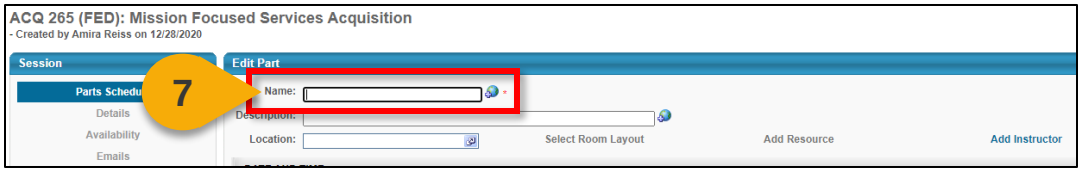
Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



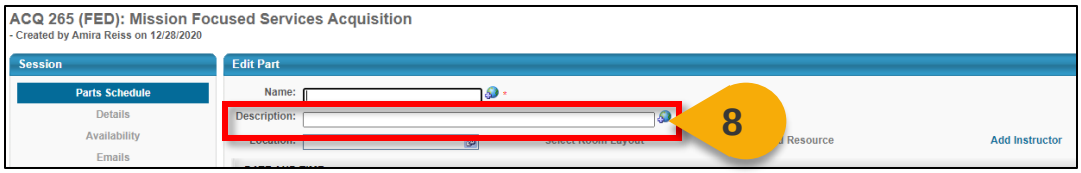
Step 6: Click **Create New Session.**



Step 7: In the Parts Schedule tab, enter the Part **Name**. The Part Name should include the schoolhouse providing the Session, the course number, the fiscal year, and the Session number. Example: DHS: ACQ 265-2021-01.

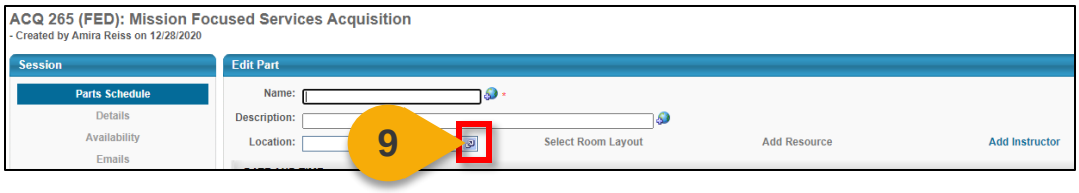


Step 8: Enter a **Description** for this Session (optional).

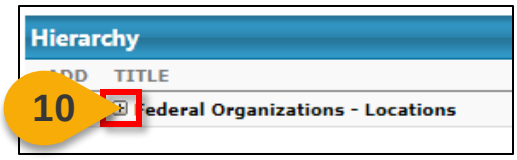


Create Sessions (Cont.2)

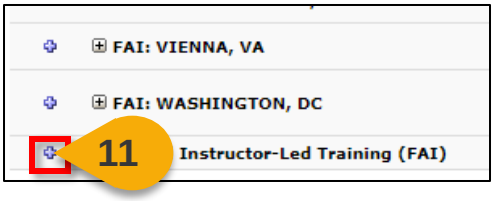
Step 9: Choose a Location for this Session by clicking the **pop out** next to the Location field.



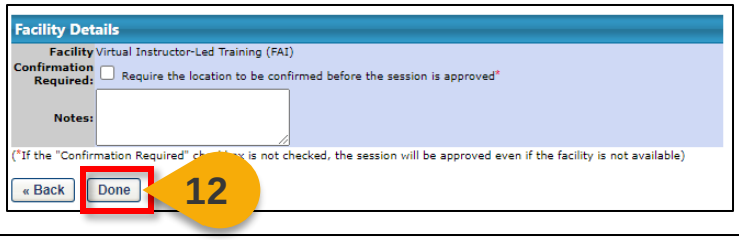
Step 10: Click the **gray +** next to a Location to drill down to the Location for this Session.



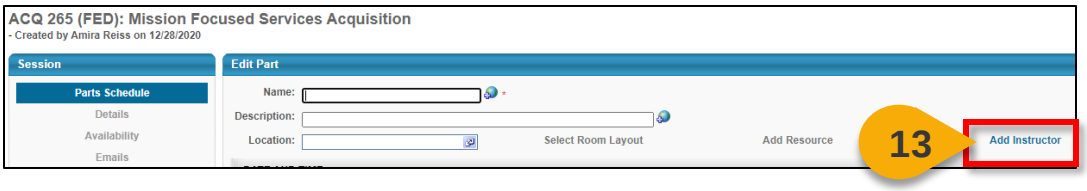
Step 11: Click the **blue +** next to a Location to select it.



Step 12: The Facility Details window will appear. Click **Done** to add this Location to the Session.

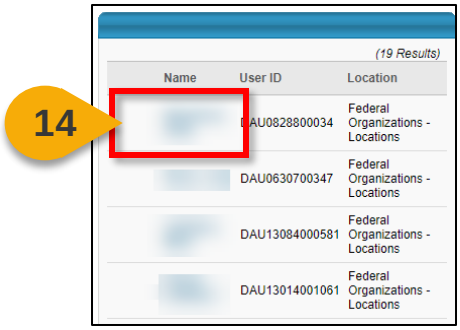


Step 13: Click **Add Instructor** to assign an Instructor to this Session.

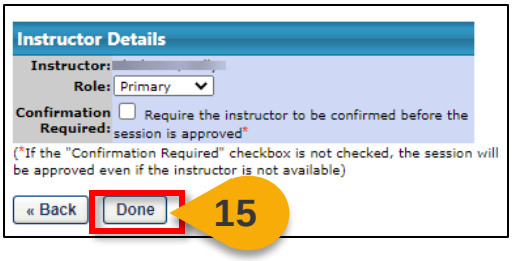


Create Sessions (Cont.3)

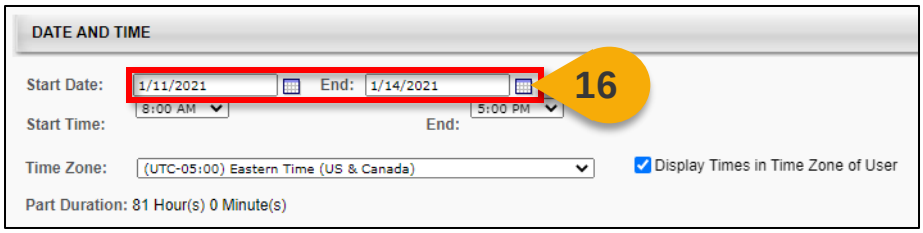
Step 14: Click the **Name** of the User you would like to make the Instructor of this Session.



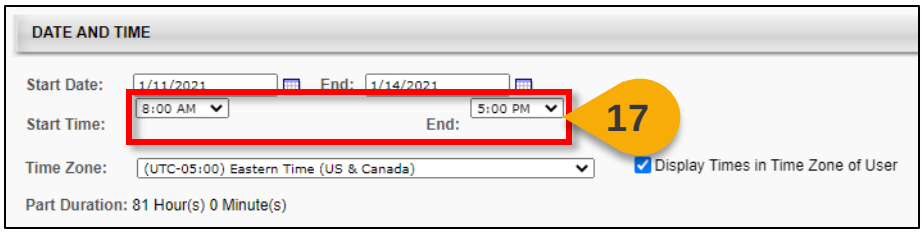
Step 15: In the Instructor Details window, click **Done** to add this Instructor to the Session.



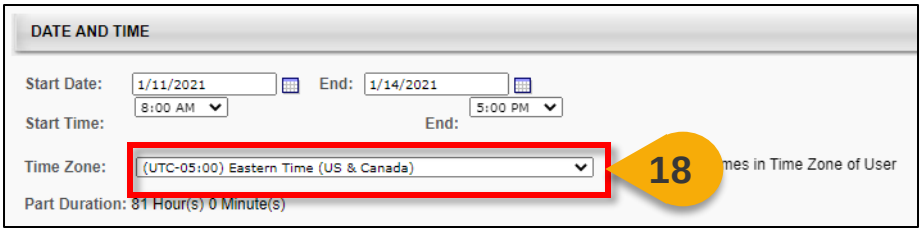
Step 16: In the Date and Time section, enter a **Start Date** and **End Date** for this Session.



Step 17: Enter a **Start Time** and **End Time**.



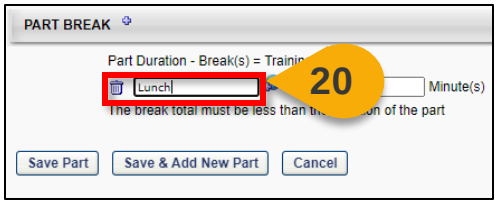
Step 18: Select the **Time Zone** for the Session.



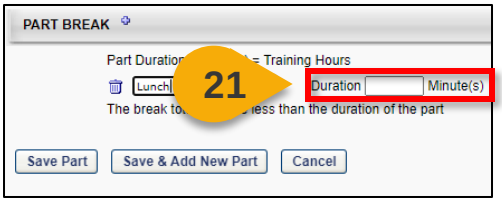
Create Sessions (Cont.4)

Step 19: If you would like CSOD to keep track of the amount of time students are actually in the Session, you can create Part Breaks. For example, if a part has a Start Time of 8:00 AM, an End Time of 5:00 PM, and a Part Break of 30 minutes, then the total training hours for the part is 8.5 hours. Part Breaks are not required and will not impact CLPs. To add a Part Break, click the **blue +** next to Part Break.

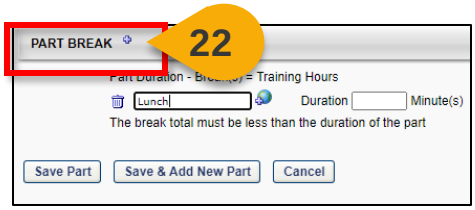
Step 20: Label the **Part Break**.



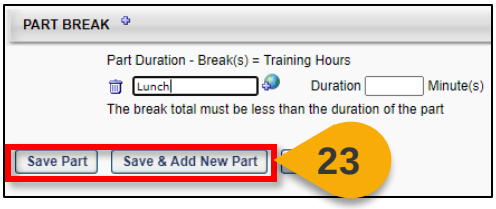
Step 21: Set the **Part Duration** in minutes.



Step 22: Add additional Part Breaks as needed by clicking the **blue +. (See note below on adding parts)**



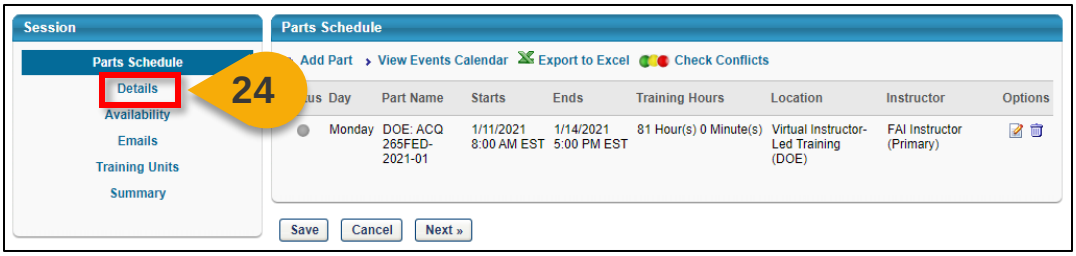
Step 23: Click **Save & Add New Part** to create another Part for this Session (this functionality is frequently used for multi-day Sessions) or click **Save Part** to save this information.



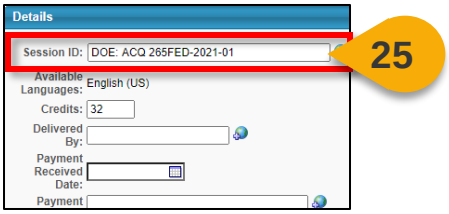
If the session duration is more than a day, or if separate sessions within the same day are required, add the session parts by clicking the Add Part link on the Parts Schedule page. See *Create Session – Parts* on CSOD's Online Help for more information.

Create Sessions (Cont.5)

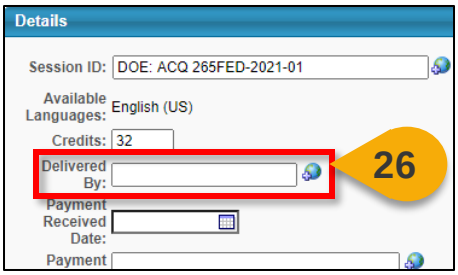
Step 24: You will now see a Summary of the Part information for this Session. Click the **Details** tab in the left-hand menu.



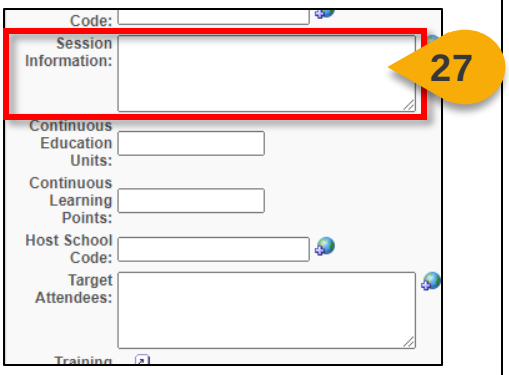
Step 25: The Session will inherit any defaults set at the Event level. You may change these values if required. Enter the Part Name you chose into the **Session ID** field.



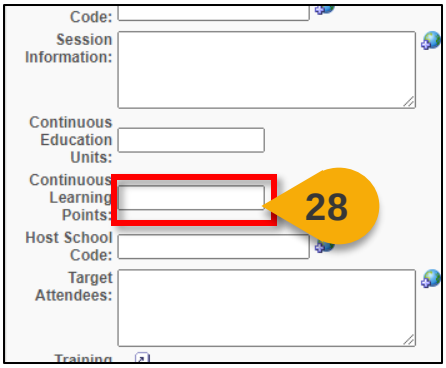
Step 26: If this Session is offered by an external training vendor, enter that Vendor into the **Delivered By** field.



Step 27: Enter **Session Information**. Session information is any additional information you'd like Users to have about this Session.



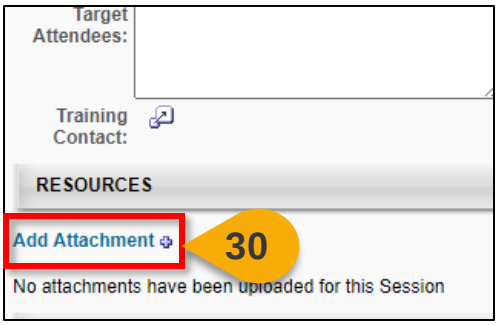
Step 28: Enter the correct number of **Continuous Learning Points** (CLPs) for this Session.



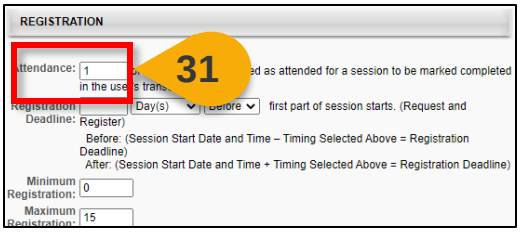
Create Sessions (Cont.6)

Step 29: Choose a **Training Contact**. The Registrar or Student Services member creating the Session will be listed as default.

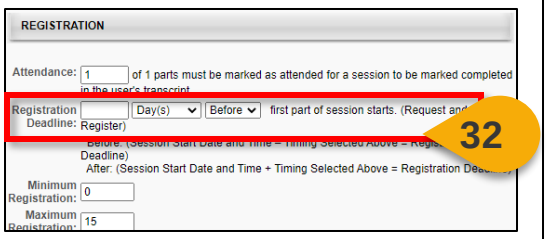
Step 30: If there are resources Users need prior to the Session, add them to the Resources section by clicking the **blue +** next to Add Attachment.



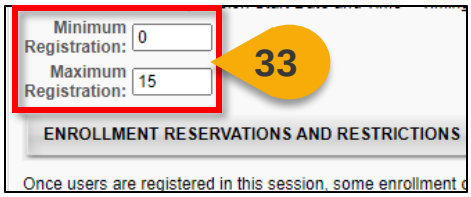
Step 31: In the Registration section, enter the **Attendance** requirements. This field will dictate how many parts users must attend to get credit for the course.



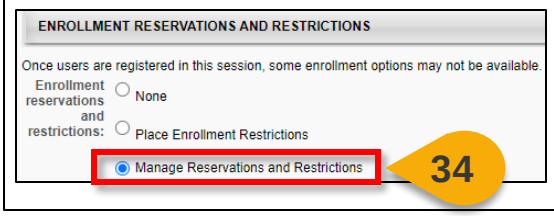
Step 32: If applicable, set the **Registration Deadline** by indicating at which point Users can no longer Register or Request the Session.



Step 33: Edit the **Minimum Registration** and **Maximum Registration** fields if these values are different than those entered for the Event.

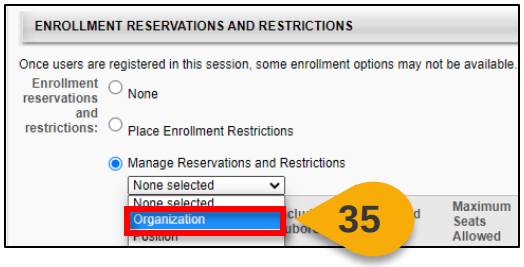


Step 34: Use the Enrollment Reservations and Restrictions section to send all users outside your schoolhouse to the waitlist. Select **Manage Reservations and Restrictions**.

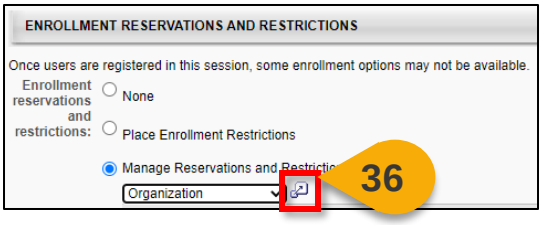


Create Sessions (Cont.7)

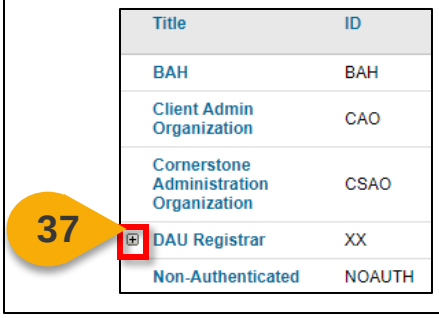
Step 35: A drop-down menu will appear. Choose **Organization.**



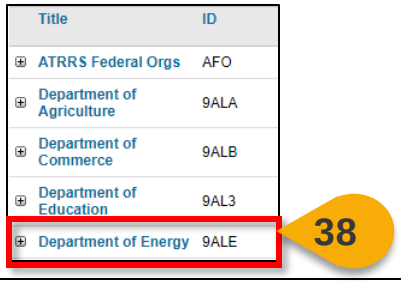
Step 36: Click the **pop out** next to Organization to view the list of Organizations.



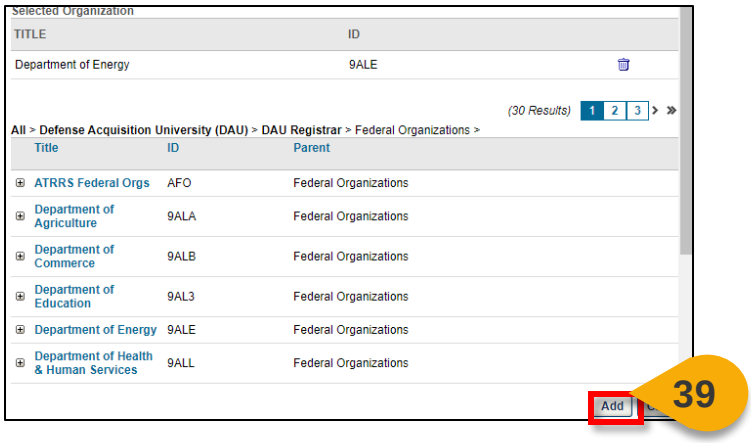
Step 37: In the window that opens, click the **gray +** next to DAU Registrar to drill down to your Schoolhouse.



Step 38: Continue to drill down into the Federal Organizations. When you reach your Schoolhouse, click **Title** of the Organization.



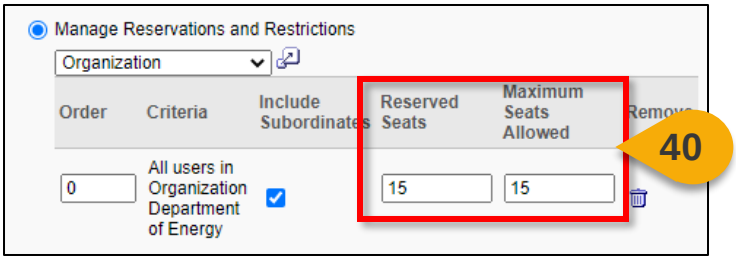
Step 39: Click **Add** at the bottom of the window.



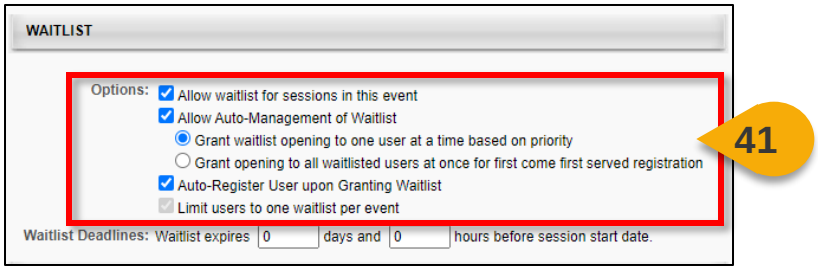
Create Sessions (Cont.8)

Step 40: The Organization will appear in the Enrollment Reservations and Restrictions section. Enter the value from Maximum Registration into **Reserved Seats** and **Maximum Seats Allowed.**

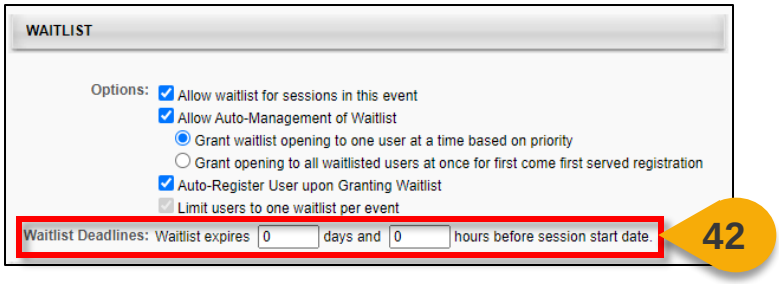
All Users outside your Organization will now be sent to the Waitlist and Users within your Organization will be automatically approved for a seat.



Step 41: In the Waitlist Section, ensure **Allow waitlist for sessions in this event**, **Allow Auto-Management of Waitlist**, **Grant waitlist opening to one user at a time based on priority**, **Auto-Register User upon Granting Waitlist**, and **Limit users to one waitlist per event** are all checked.

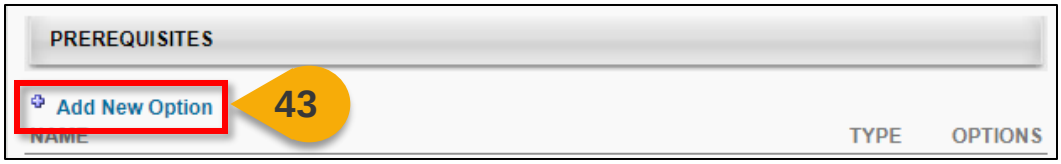


Step 42: If you would like the Waitlist to expire, enter the criteria for that expiration in the **Waitlist Deadlines** fields.

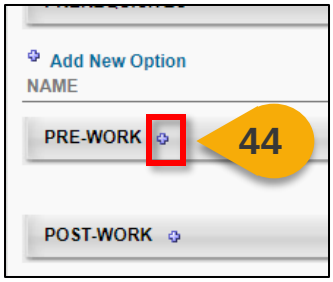


Create Sessions (Cont.9)

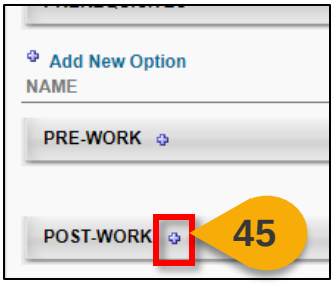
Step 43: If the Session has a prerequisite, click **Add New Option** in the Prerequisites section.



Step 44: If the Session has pre-work, click the **blue +** in the Pre-Work section to add it to the Session.



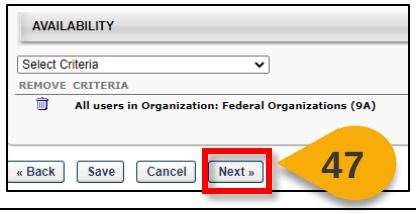
Step 44: If the Session has post-work, click the **blue +** in the Post-Work section to add it to the Session.



Step 46: At the bottom of the page, click **Next** to save these inputs and go to the Availability tab.

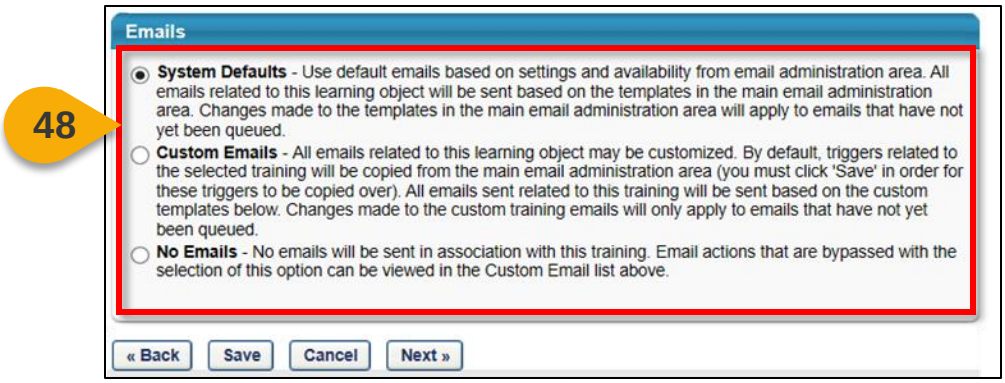
Step 47: Availability dictates who can find the Session in their search results and request to enroll. The Session will inherit the availability of the Event, however, can make it more restrictive by only making the Session available to your Organization. Most Sessions will use the inherited availability. See the Create an Event task aid for more details on setting availability.

Confirm the availability and click **Next**.

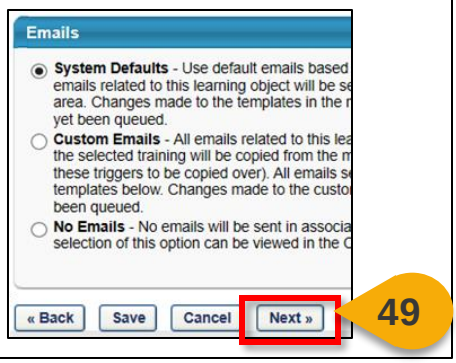


Create Sessions (Cont.10)

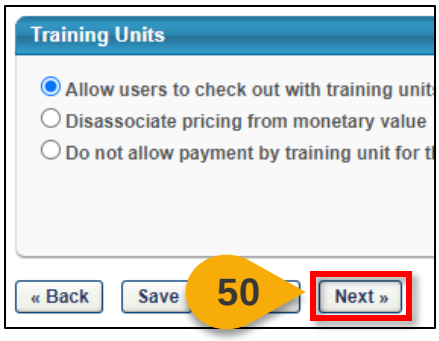
Step 48: In the Emails tab, select which emails you would like to fire for this Event.
Choose **System Defaults** to use the emails that are sent for all Federal Organizations Sessions.
Choose **Custom Emails** to customize the emails that are sent for the Session. See the Edit Events task aid for more information on how to create custom emails.
Choose **No Emails** if you do not want any emails to be sent to Users for this Session.



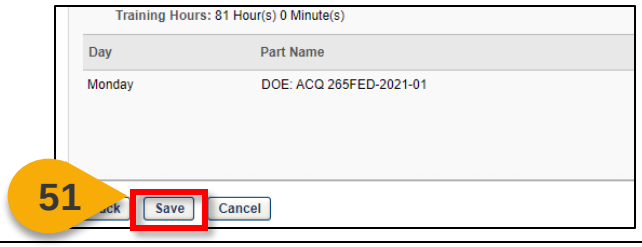
Step 49: Click **Next** to save these decisions and move to the next tab.



Step 50: You will not use the Training Units tab. Click **Next**.

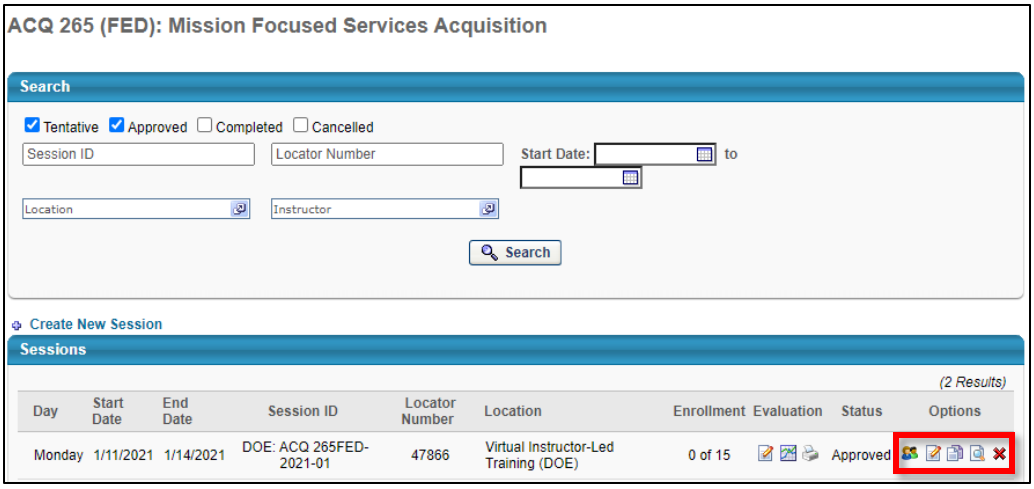


Step 51: The Summary tab will allow you to review the decisions you made on the previous tabs. Confirm these settings and click **Save** to create the Session.



Create Sessions (Cont.11)

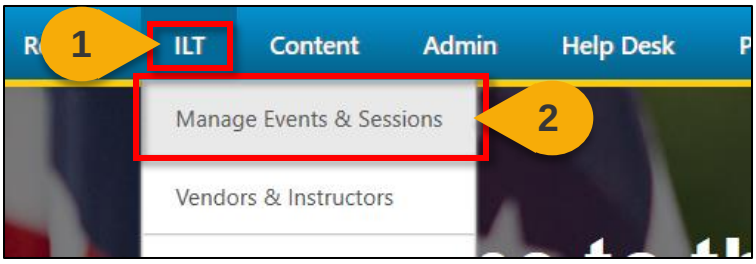
The Session is now available to Users. You will be returned to the Event page, where the Session is now listed. From here, you can **view the Roster**, **edit the Session**, **copy the Session**, or **cancel the Session**.



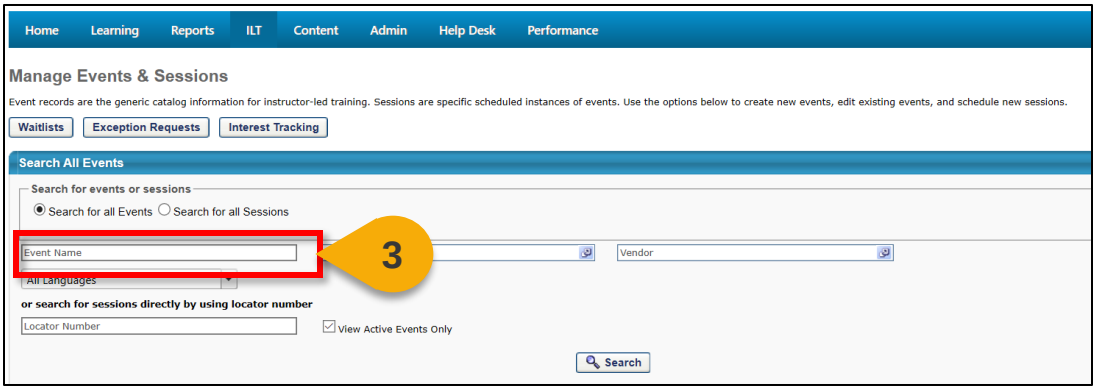
Edit Sessions

When you want to edit a Session you've created…

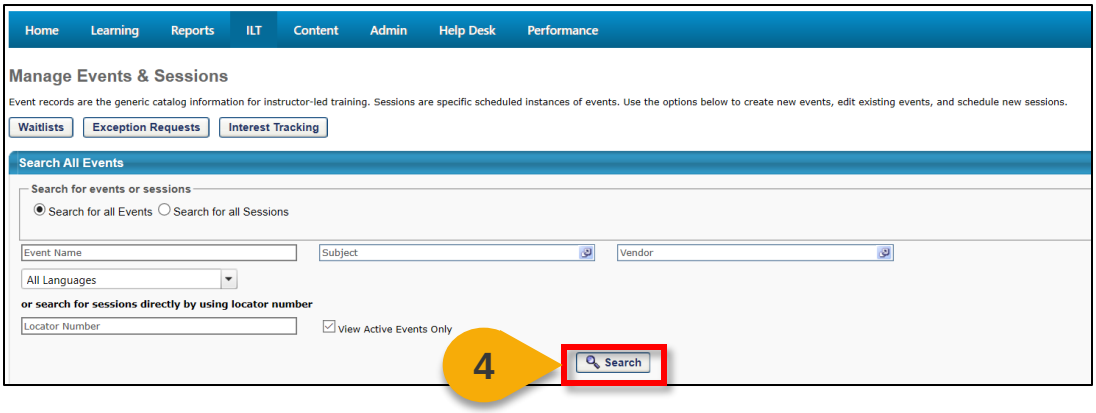
Steps 1 & 2: Hover over the **ILT** tab, and then select **Manage Events & Sessions.**



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

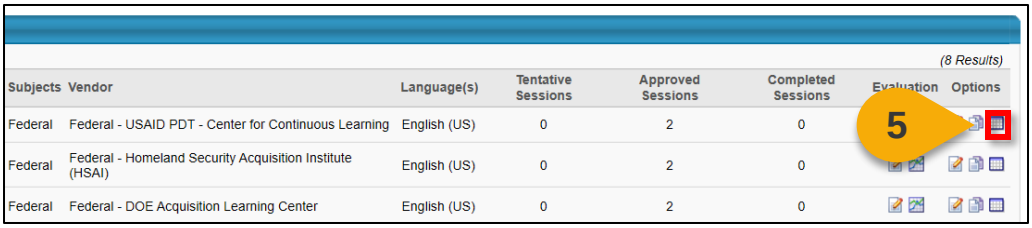


Step 4: Click **Search** or hit **Enter.**

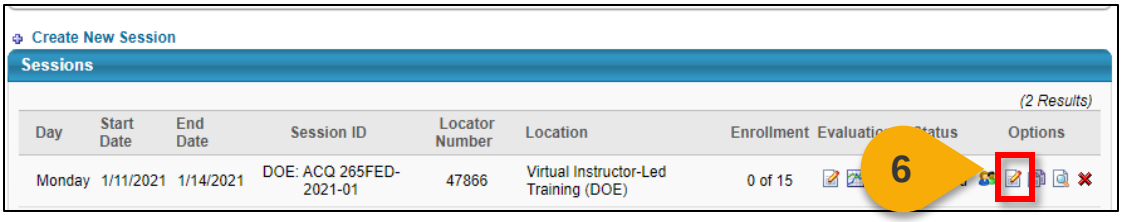


Edit Sessions (Cont.1)

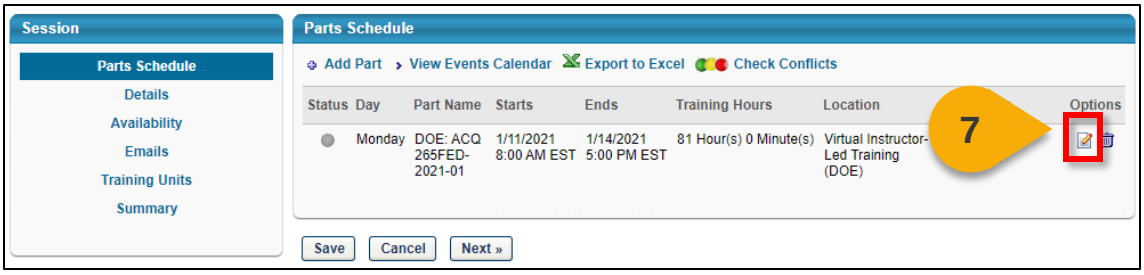
Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



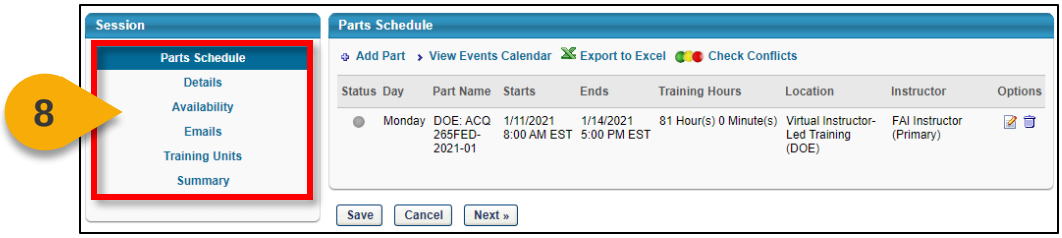
Step 6: Click the **Edit** icon in the Options column to the right of the Session you would like to edit.



Step 7: To edit the Part, click the **Edit** icon in the Options column.

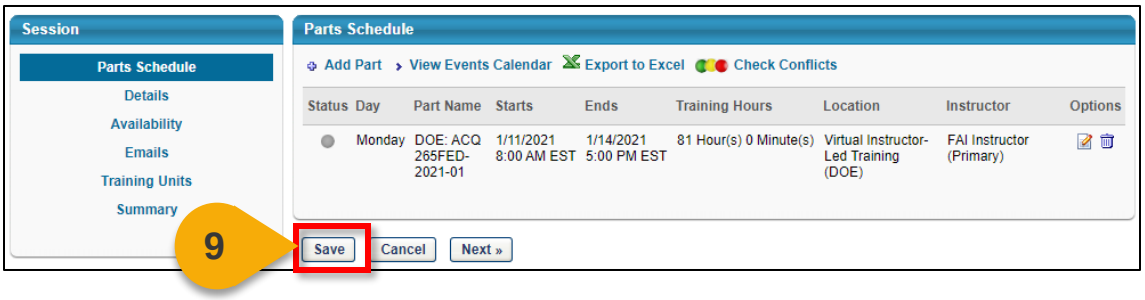


Step 8: To edit the details on any other tabs, click on the tab **Name** in the left-hand menu to navigate to that tab.

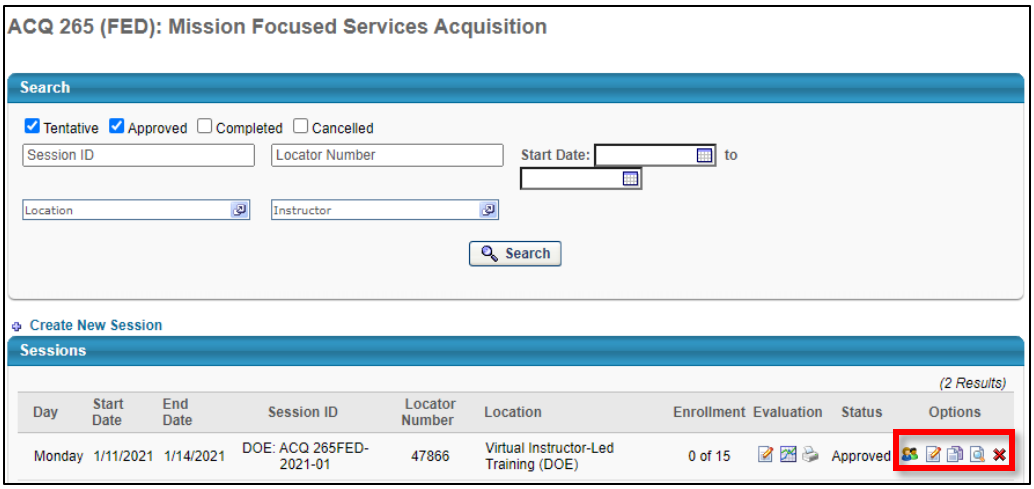


Edit Sessions (Cont.2)

Step 9: Click **Save** to save any changes.



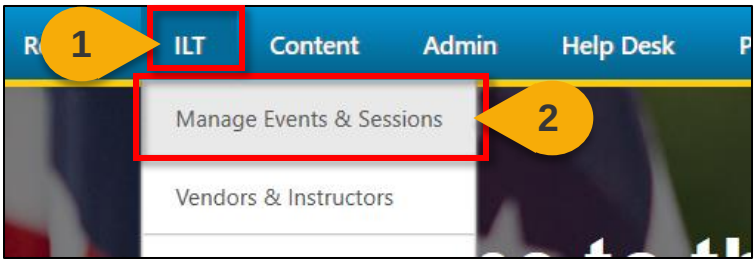
The Session is now available to Users. You will be returned to the Event page, where the Session is now listed. From here, you can **view the Roster**, **edit the Session**, **copy the Session**, or **cancel the Session**.



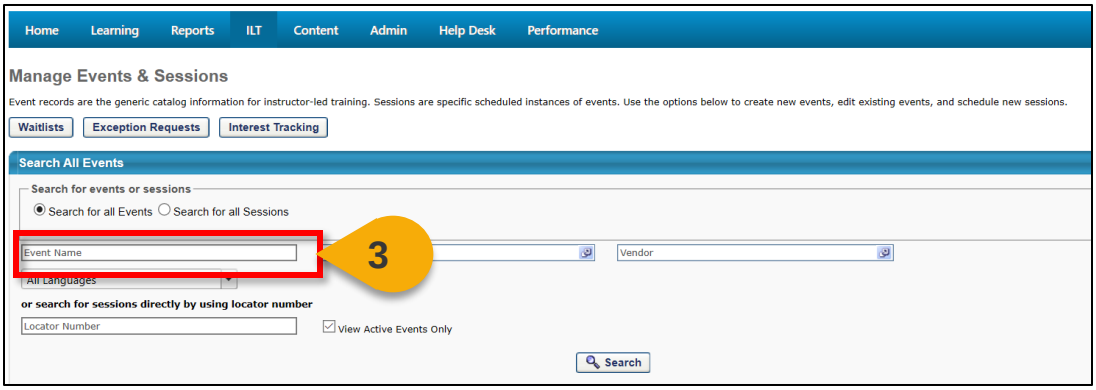
Cancel Sessions

When you want to cancel a Session…

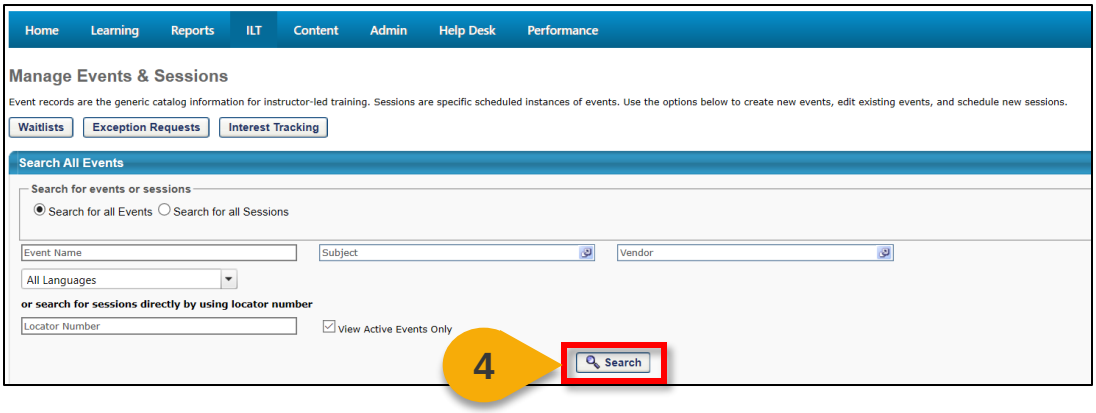
Steps 1 & 2: Hover over the **ILT** tab, then click on **Manage Events & Sessions.**



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



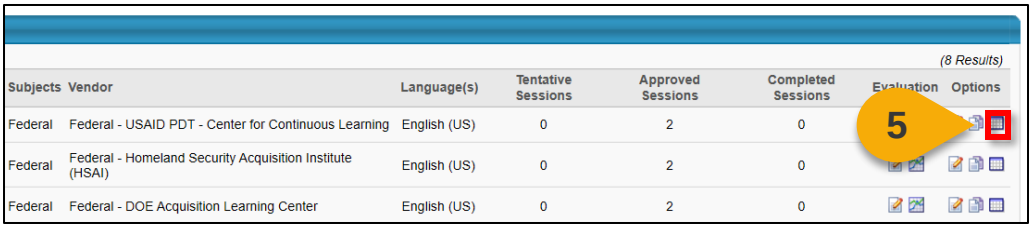
Step 4: Click **Search** or hit **Enter.**



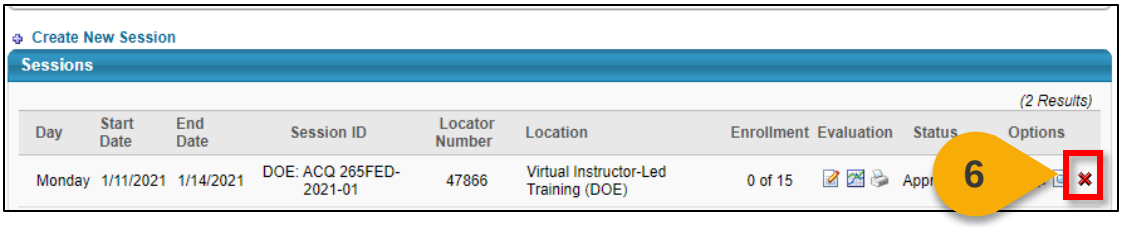
Cancel Sessions (Cont.1)

When you want to cancel a Session…

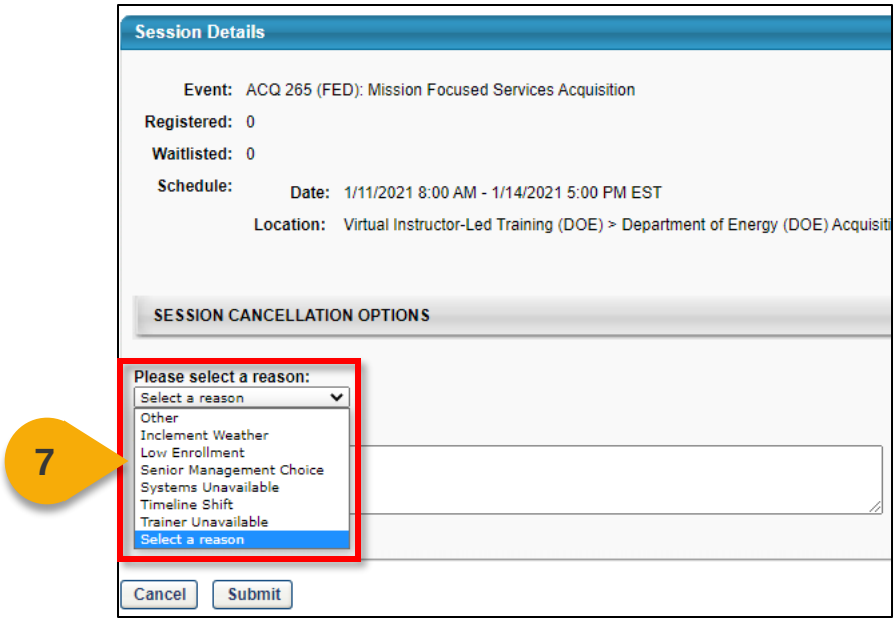
Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



Step 6: Click the **Cancel** icon in the Options column to the right of the Session you would like to cancel.



Step 7: The Session Details page will show details about the Session and Session Cancellation Options. Choose a reason for cancelling the Session in the **Please Select a Reason** dropdown menu.

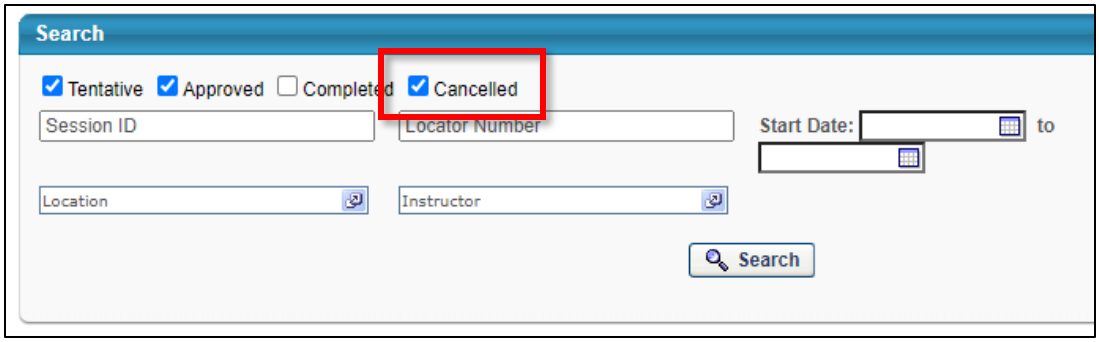


Cancel Sessions (Cont.2)

When you want to cancel a Session…

Step 8: Enter a **comment** providing more detail about why the Session is being cancelled.

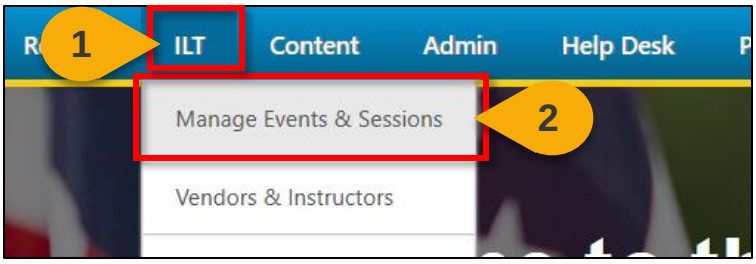
You will be returned to the Event page. If you need to view the Session you cancelled, toggle the **Cancelled** filter when searching for the Session.



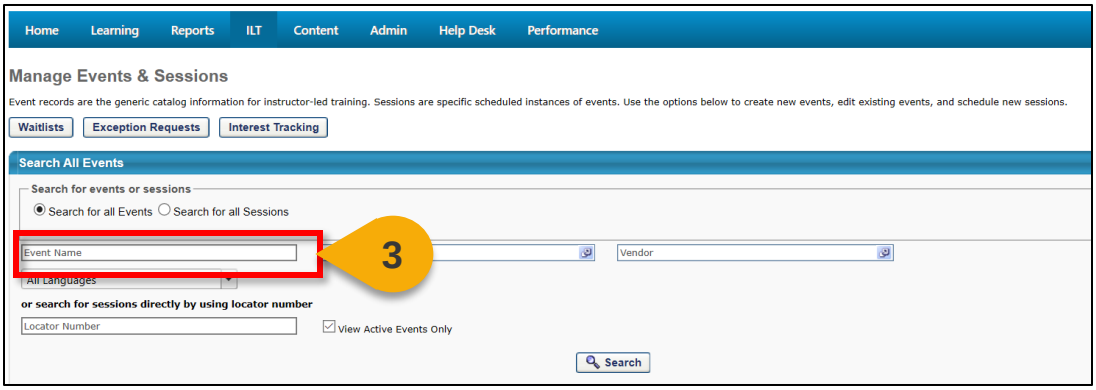
View Roster

When you want to view the Roster for an ILT…

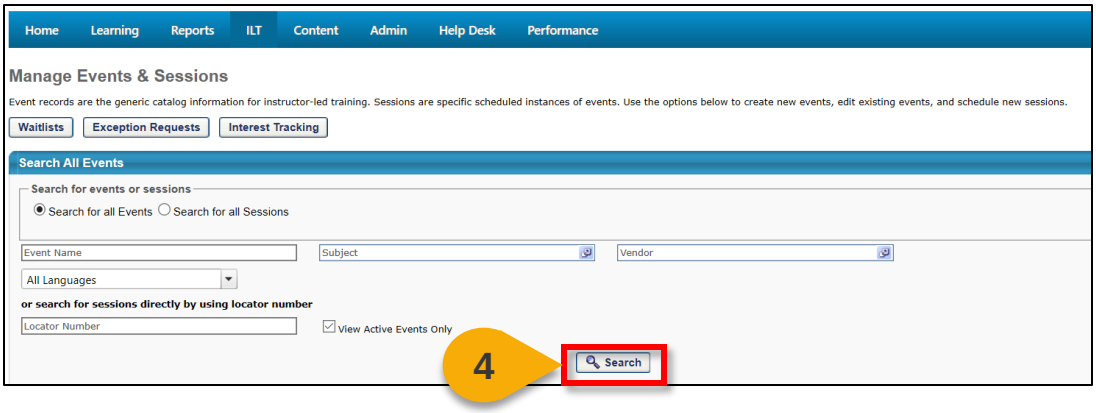
Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events & Sessions.**



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

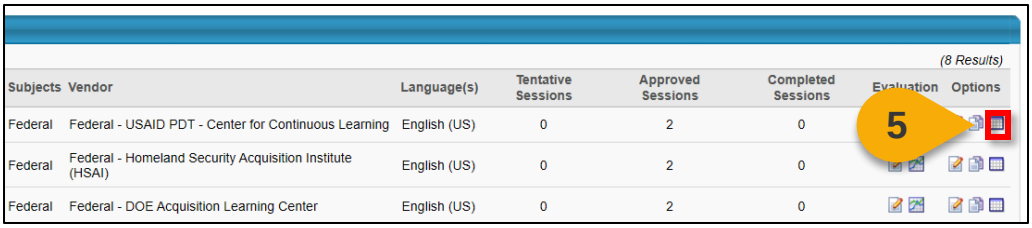


Step 4: Click **Search** or hit Enter**.**

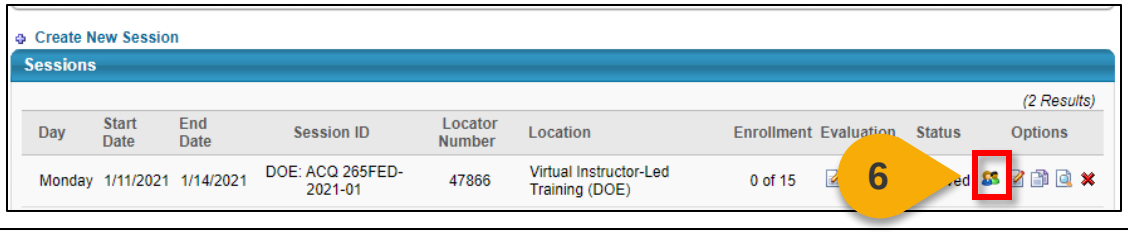


View Roster (Cont.1)

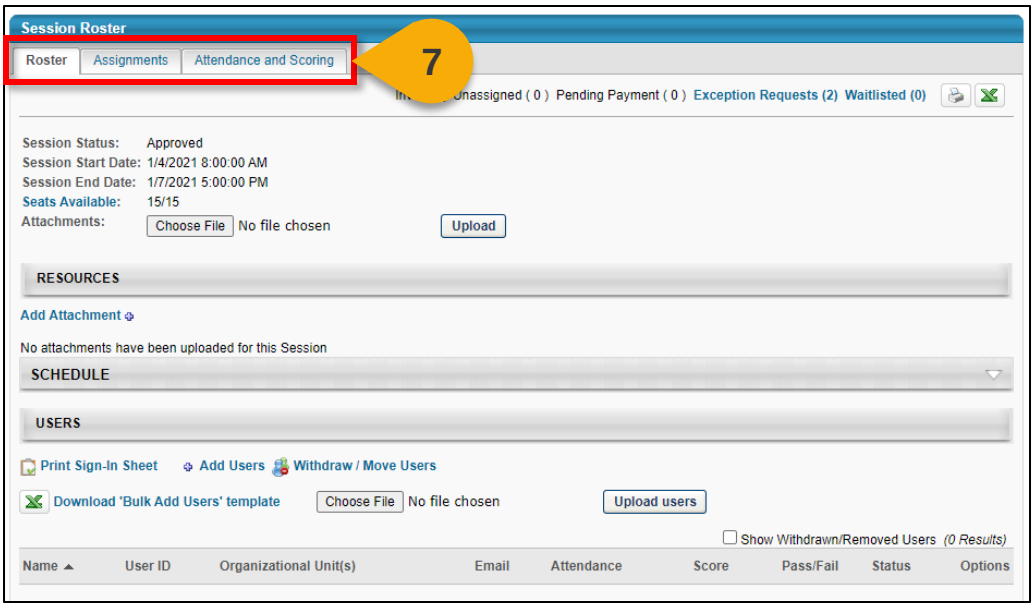
Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



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



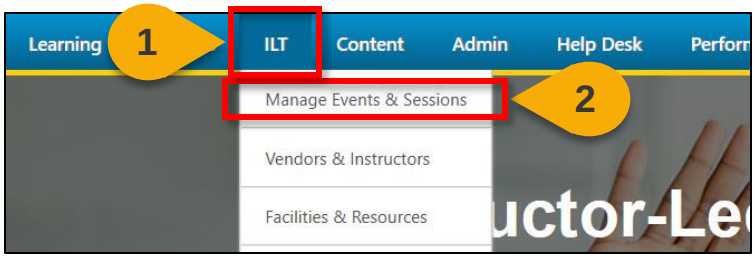
Step 7: From this page, you may **view Users** on the Roster and Waitlist. Additionally, you can manage enrollment and attendance. See the Manage Roster task aid for more information.



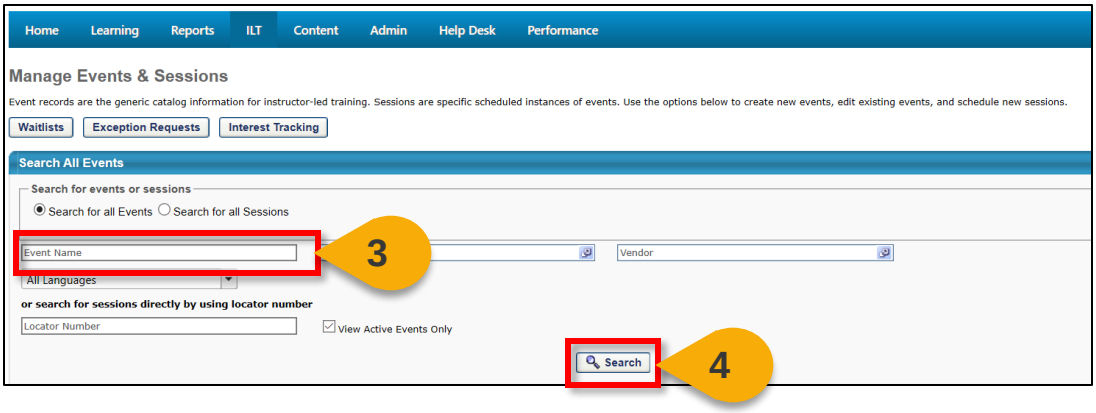
Manage Roster

When you want to edit a Roster…

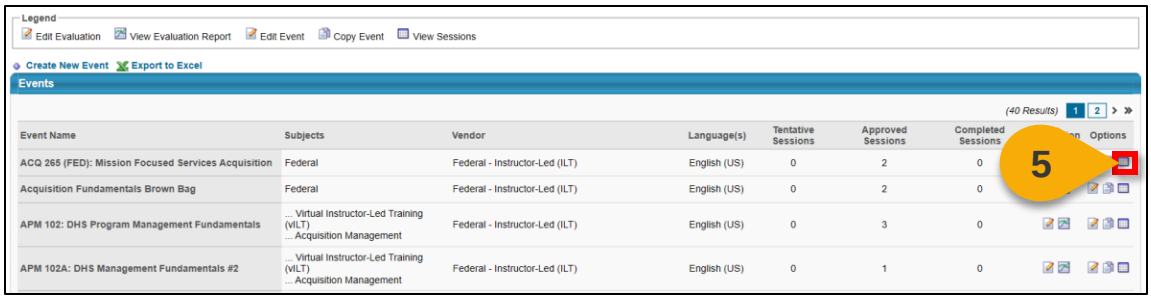
Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events & Sessions.**



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

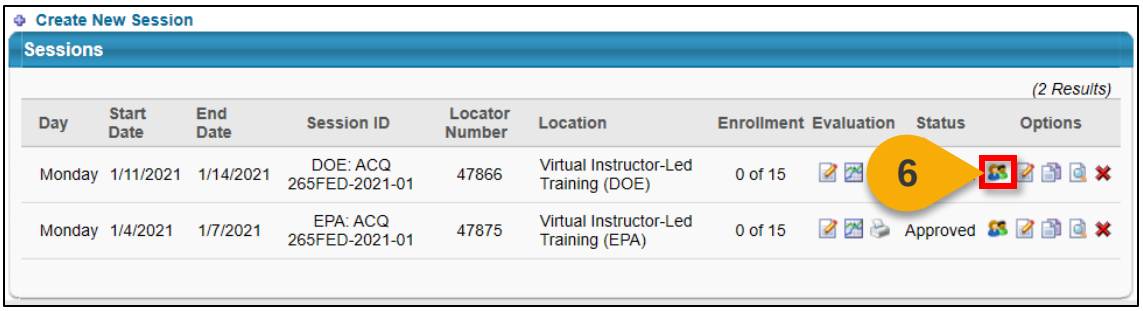


Step 5: Click on the **Calendar** icon to view the Sessions for the Event.

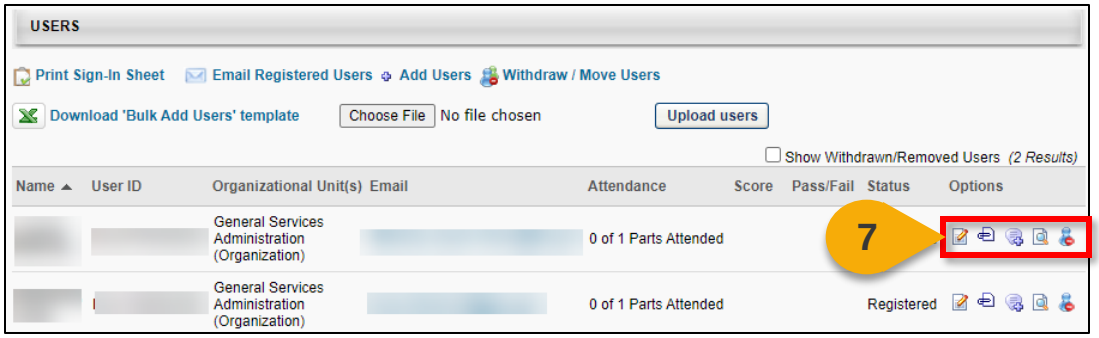


Manage Roster (Cont.1)

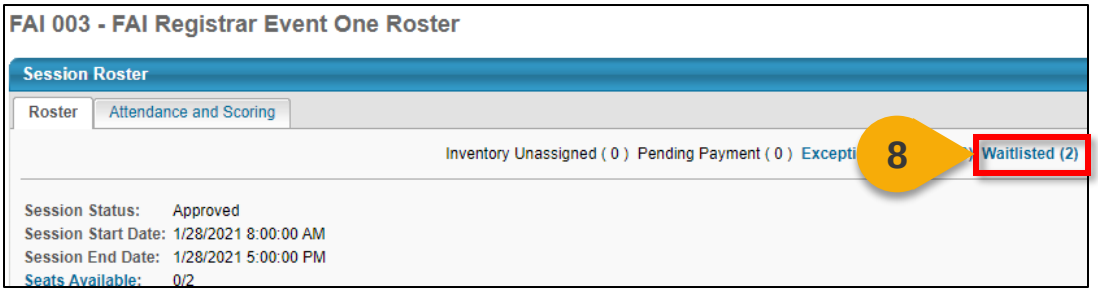
Step 6: Click on the **View Roster** icon to view the Roster.



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

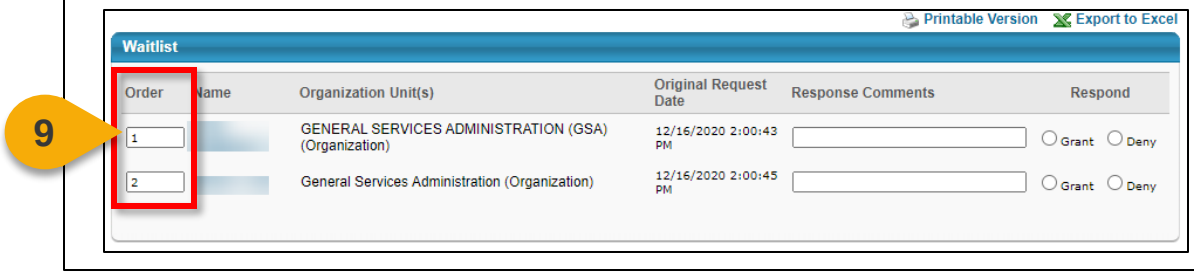


Step 8: See other task aids to learn now to email registered users, withdraw/move users, add users, and complete attendance. Click the **Waitlisted** link to view the Waitlist.

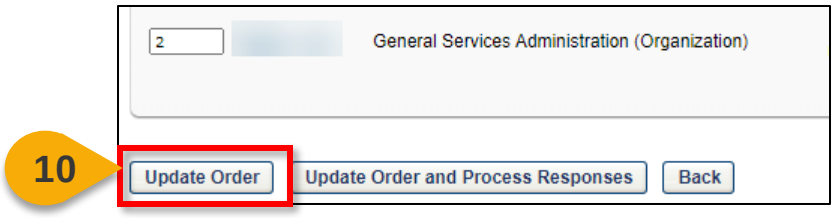


Manage Roster (Cont.2)

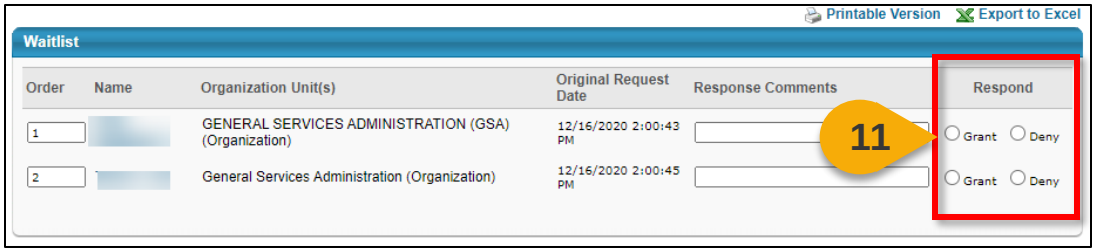
Step 9: The Waitlist will display. Edit Waitlist priority by **changing the numbers** in the Order column. The User with Order 1 will have first priority for an open spot in the course.



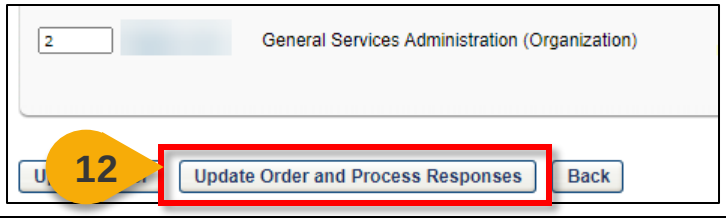
Step 10: Click **Update Order** to save these changes.



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



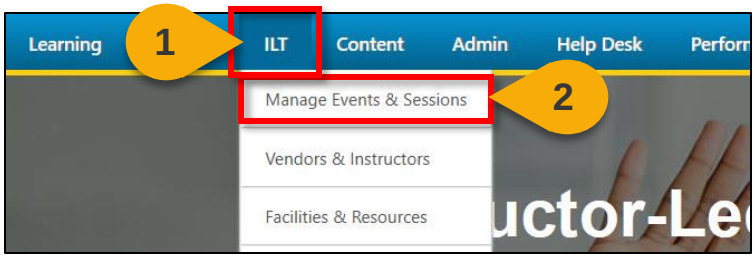
Step 12: Click **Update Order and Process Responses** to save these changes.



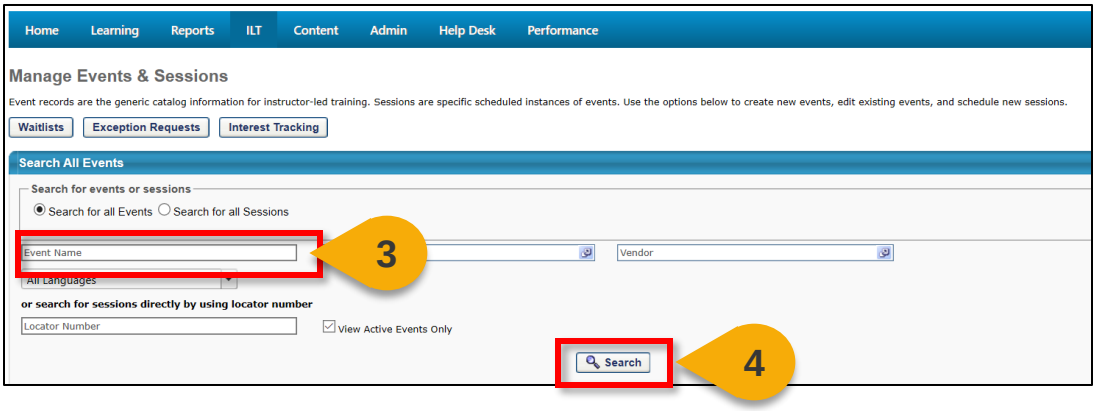
Update Roster via Upload

When you want to upload an updated Roster…

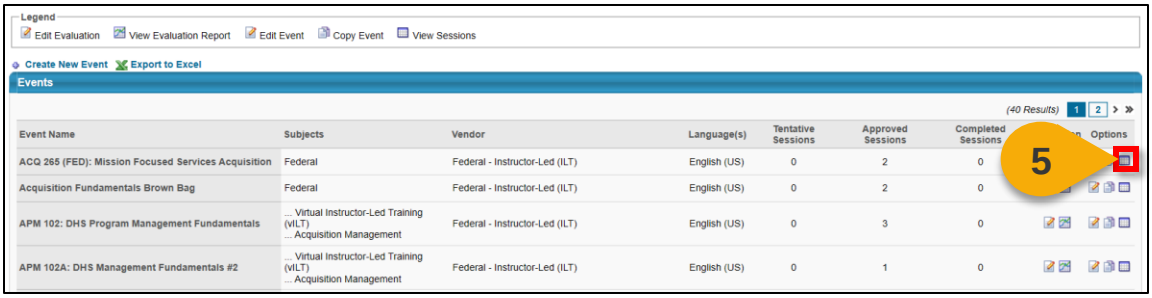
Steps 1 & 2: Hover over the **ILT** tab and select **Manage Events & Sessions.**



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

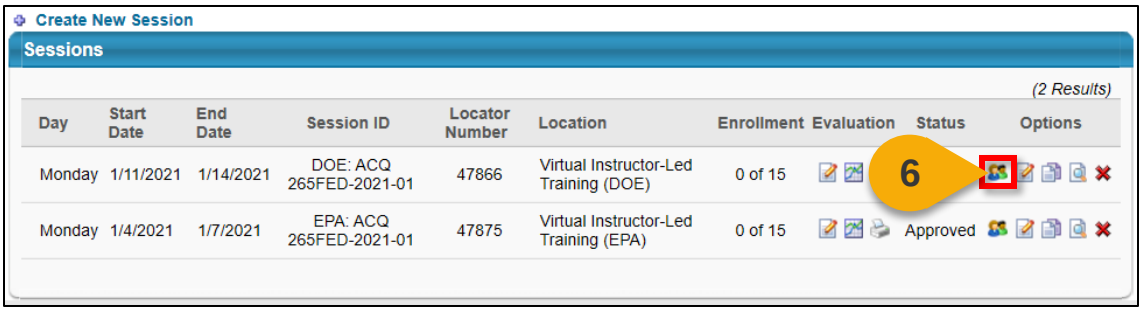


Step 5: Click on the **Calendar** icon to view the sessions for the Event.

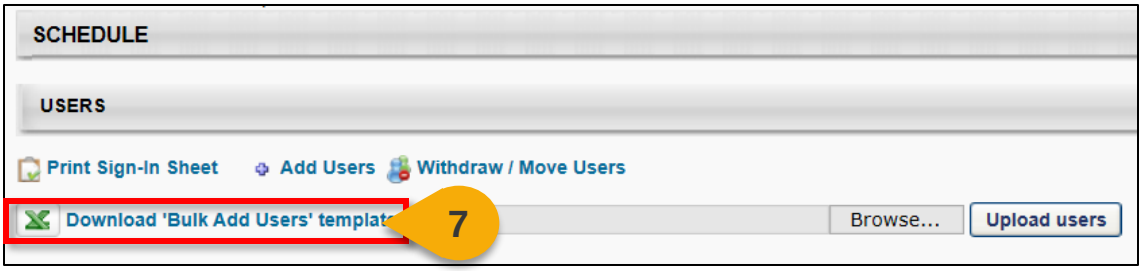


Update Roster via Upload (Cont.1)

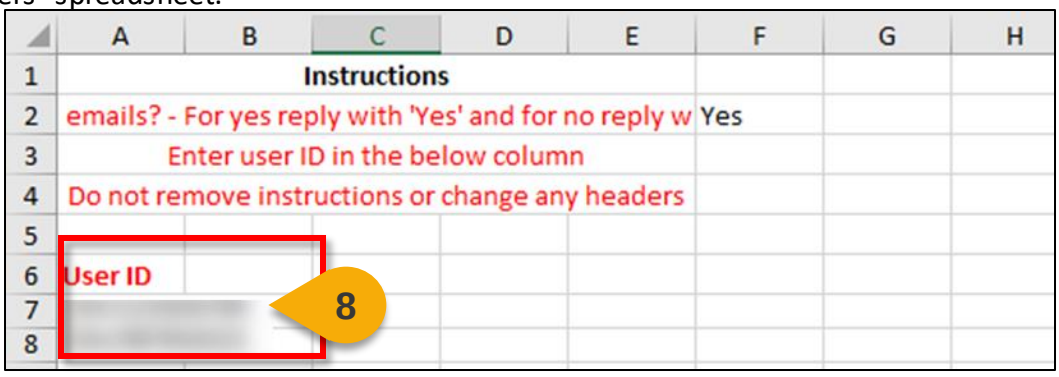
Step 6: Click on the **View Roster icon** for the desired session to see the Roster.



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

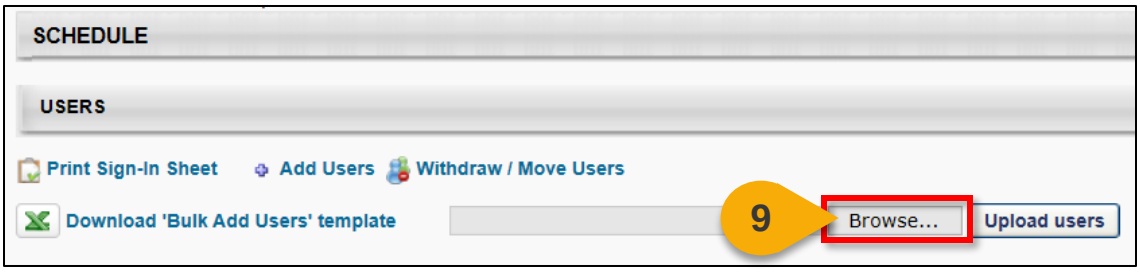


Step 8: Enter the **User ID** of each User you want to add to the Roster into the spreadsheet and save the file. Only 100 users can be uploaded in a single "Bulk Add Users" spreadsheet.

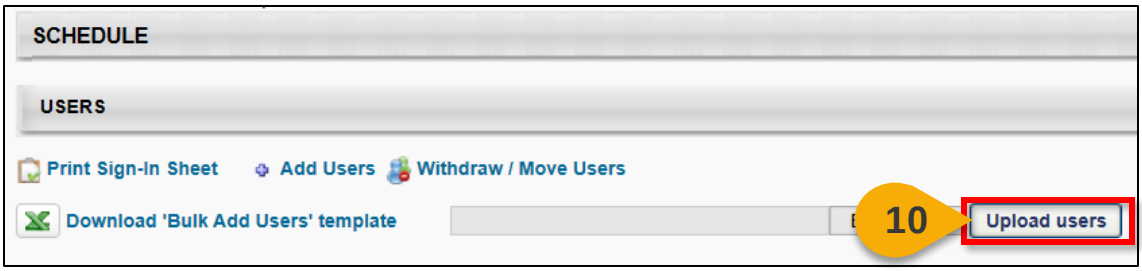


Update Roster via Upload (Cont.2)

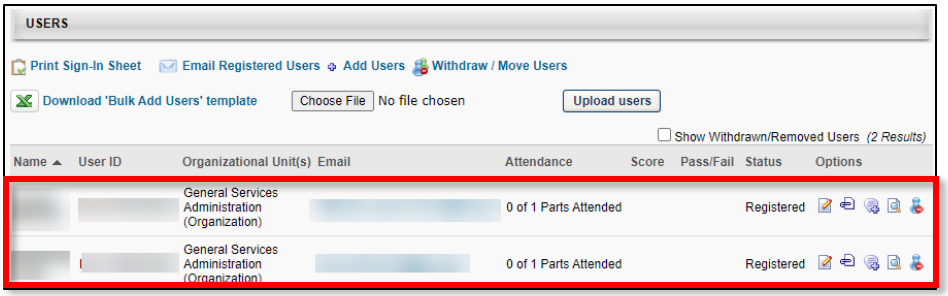
Step 9: On the Roster page, click on **Browse** and choose the Roster file you wish to upload.



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



The new Users will appear on the Roster.

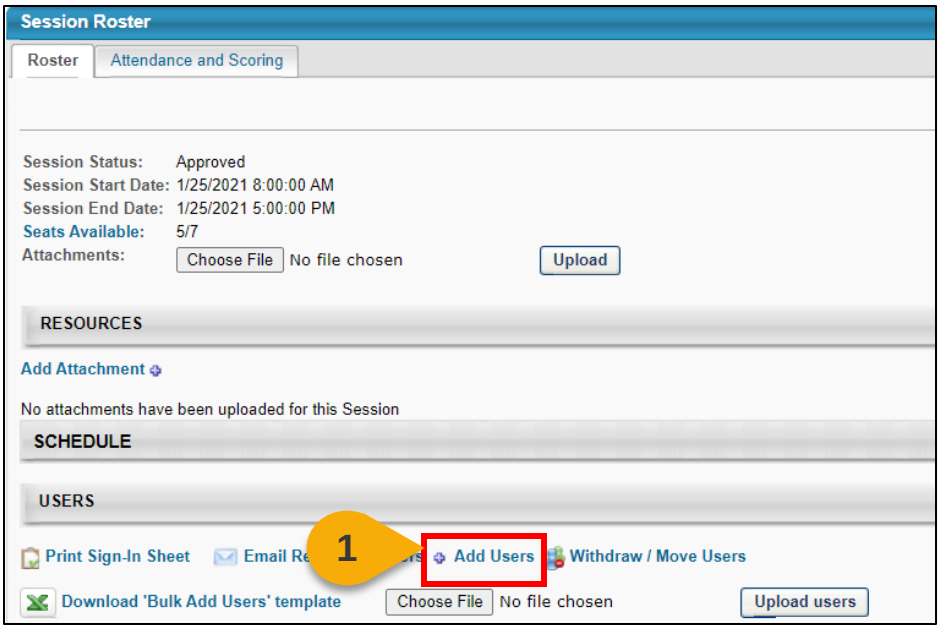


Users are added to the session, not to a session's individual session parts. Attendance of session parts is marked by the instructor.

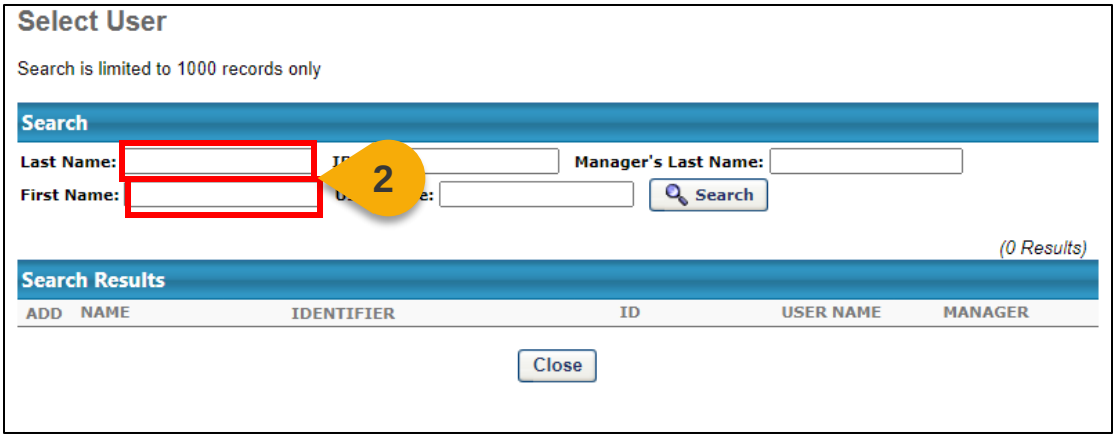
Add Walk-Ins to Roster or Users to Waitlist

When you want to add a User to a Session…

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

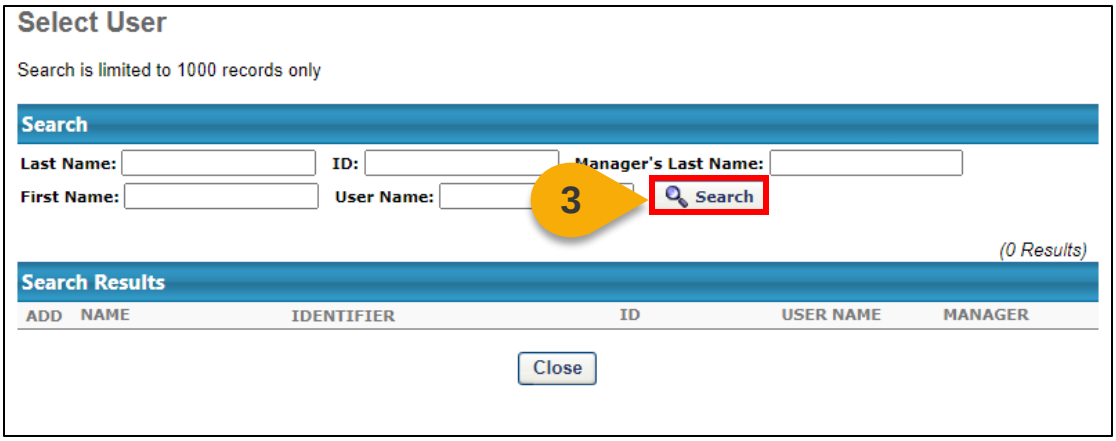


Step 2: A popup will appear. Enter the user's **name** in the appropriate fields. You can also search by User ID, User Name, or Manager's Last Name.

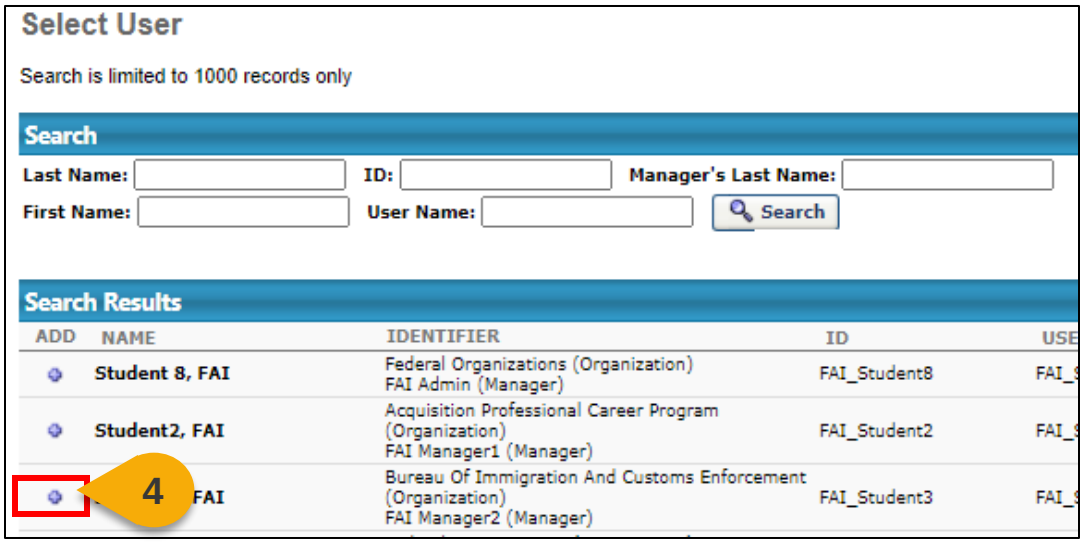


Add Walk-Ins to Roster or Users to Waitlist (Cont.1)

Step 3: Click **Search.**

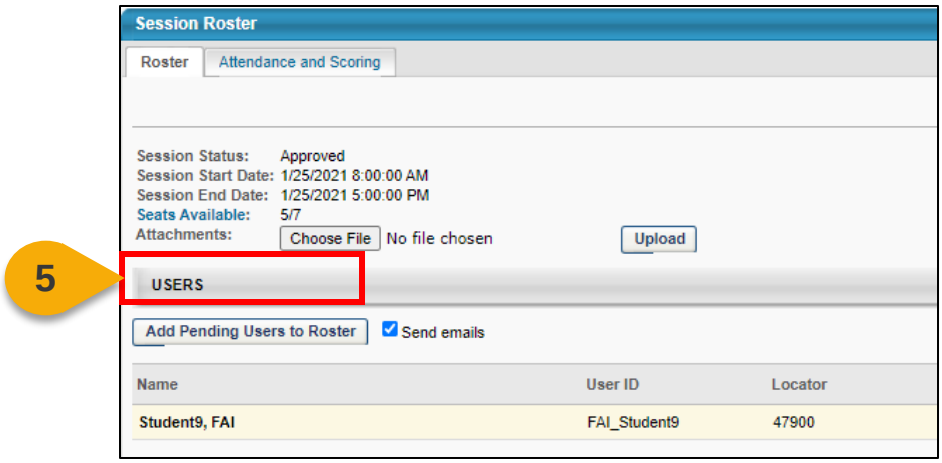


Step 4: Select the **blue plus sign** next to the user you'd like to add to the Roster.

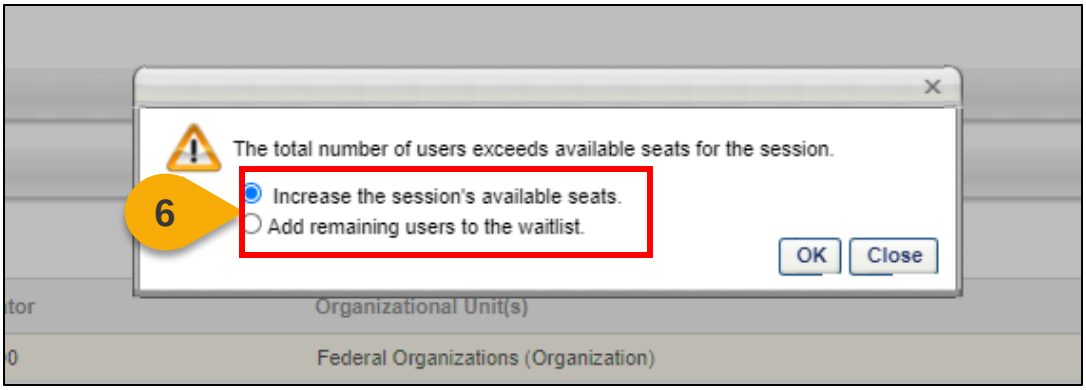


Add Walk-Ins to Roster or Users to Waitlist (Cont.2)

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

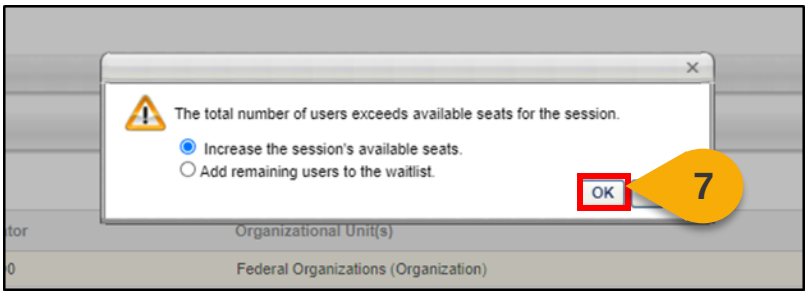


Step 6: If the Roster is full or if you are adding users who fall outside the Enrollment Restrictions, a popup will appear with a warning message. You have the option to either **Increase the Session's available seats** or **Add remaining users to the waitlist.**

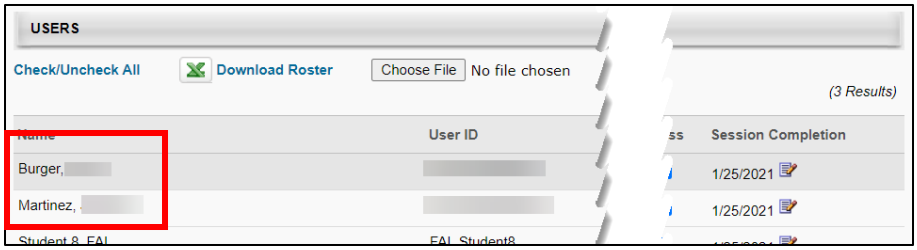


Add Walk-Ins to Roster or Users to Waitlist (Cont.3)

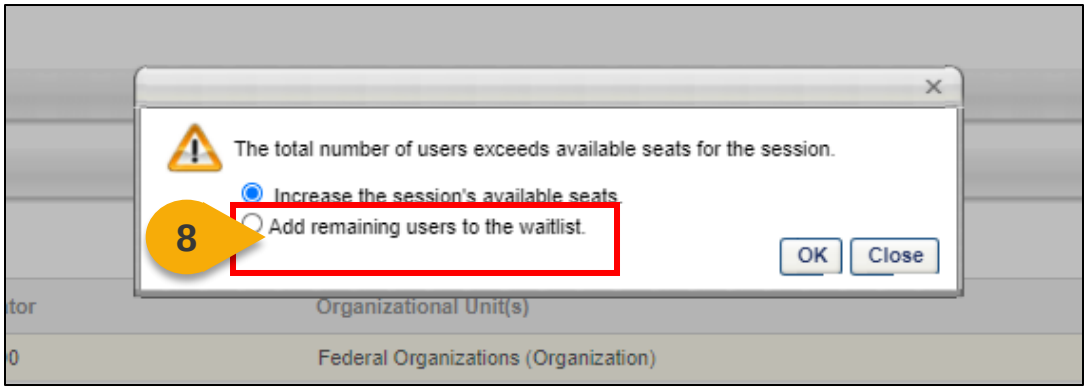
Step 7: After choosing your preferred option, select **OK.**



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

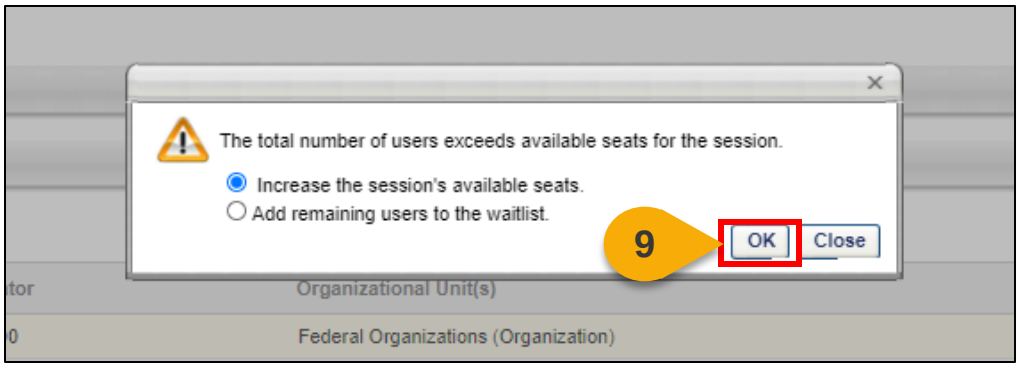


Step 8: If you want to add users to the waitlist, follow the same process for adding a walk in to the Roster. Then select **Add Remaining Users to the waitlist.**

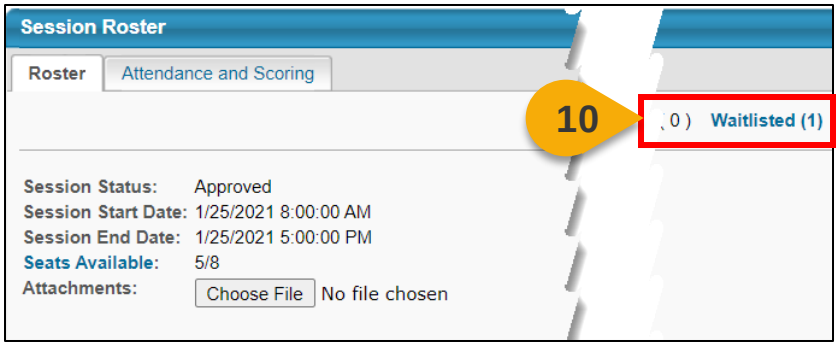


Add Walk-Ins to Roster or Users to Waitlist (Cont.4)

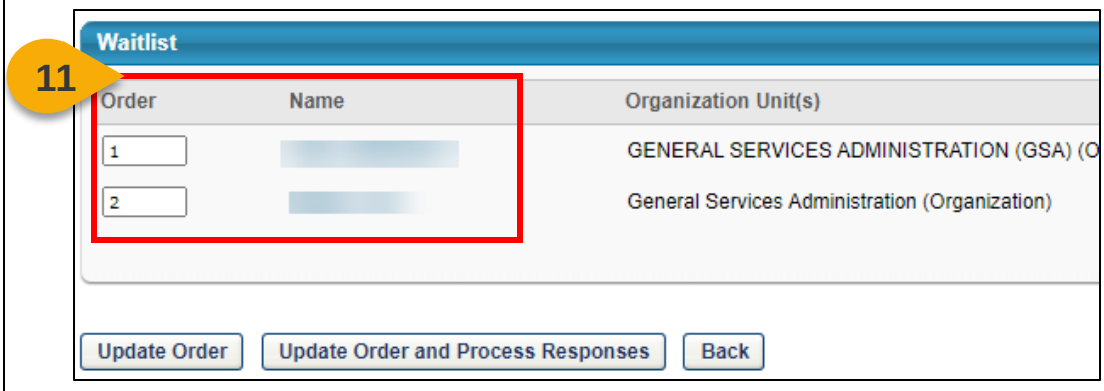
Step 9: Click **OK.**



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



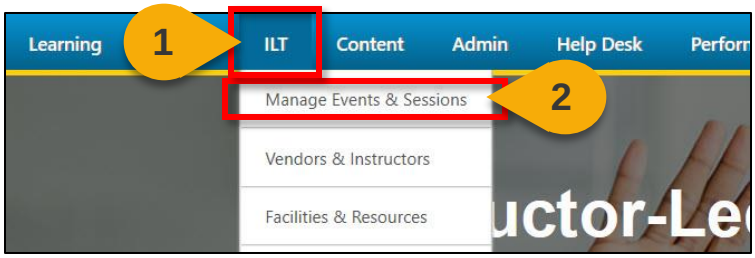
Step 11: The Waitlist page will show **all Users** on the Waitlist and allow for editing of student's priority order on the Waitlist.



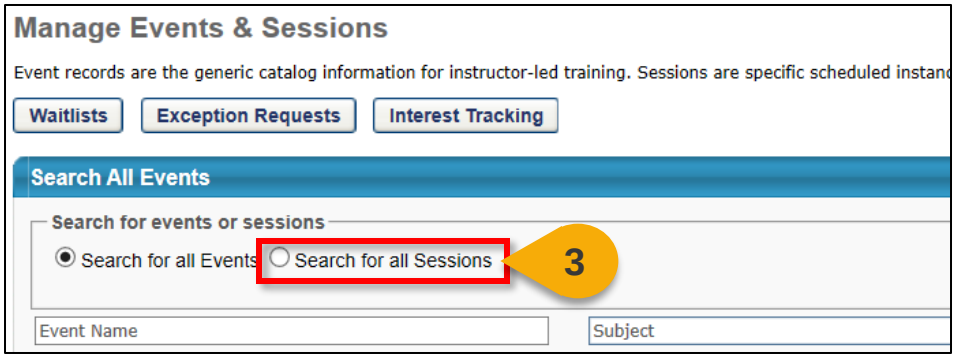
Upload Attendance

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

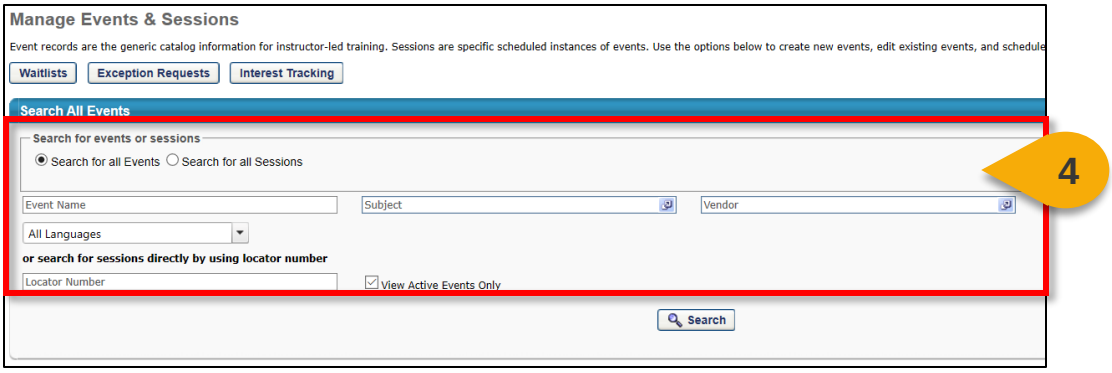
Steps 1 & 2: Hover over ILT, then select **Manage Events & Sessions.**



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

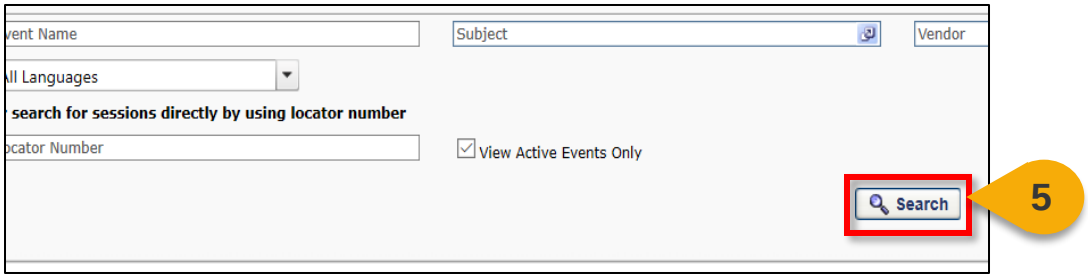


Step 4: Enter the search criteria for the Session.

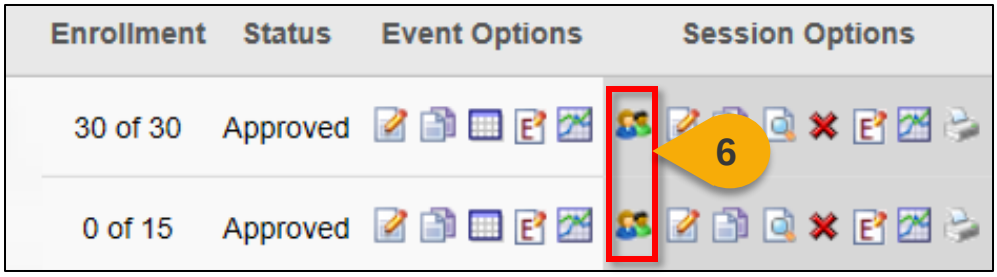


Upload Attendance (Cont.1)

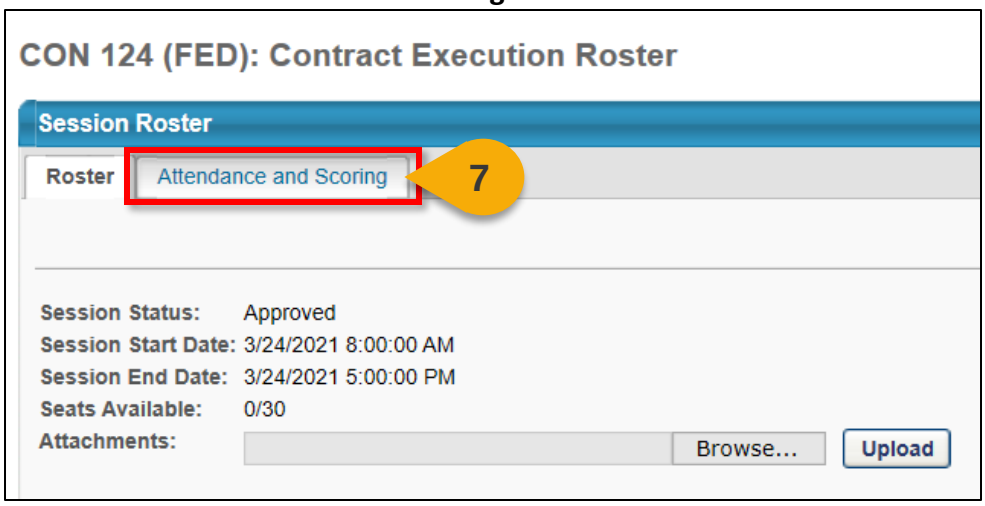
Step 5: Click **Search**.



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

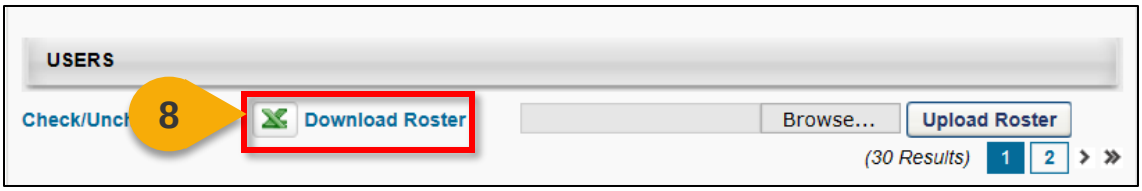


Step 7: Click on the **Attendance and Scoring** tab.

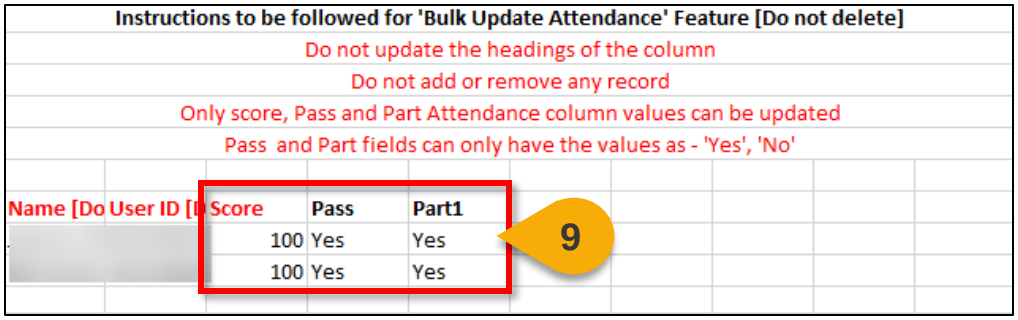


Upload Attendance (Cont.2)

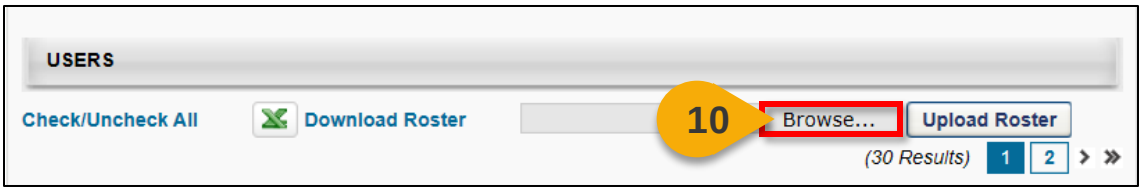
Step 8: Click on **Download Roster**. The file will download to your computer.



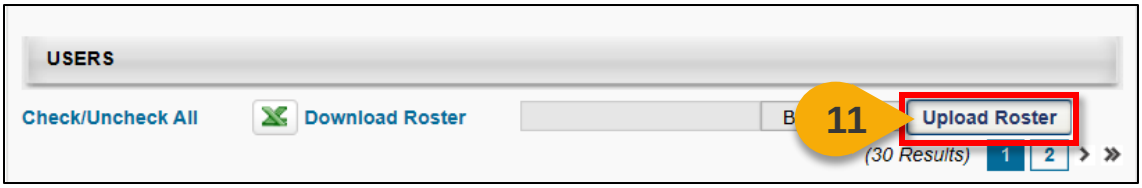
Step 9: In the Excel file you downloaded, update the **Score, Pass, and Part Attendance** columns for each user. Save the file.



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

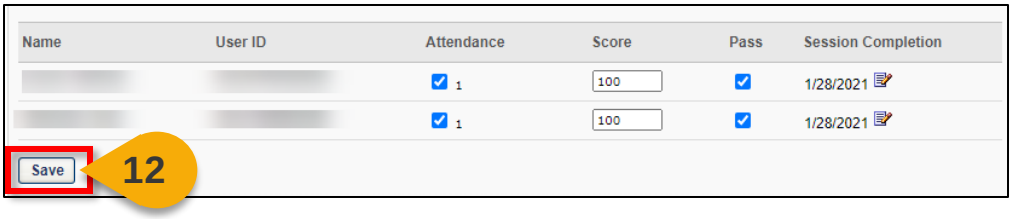


Step 11: Click on **Upload Roster.** The attendance sheet will then be uploaded.

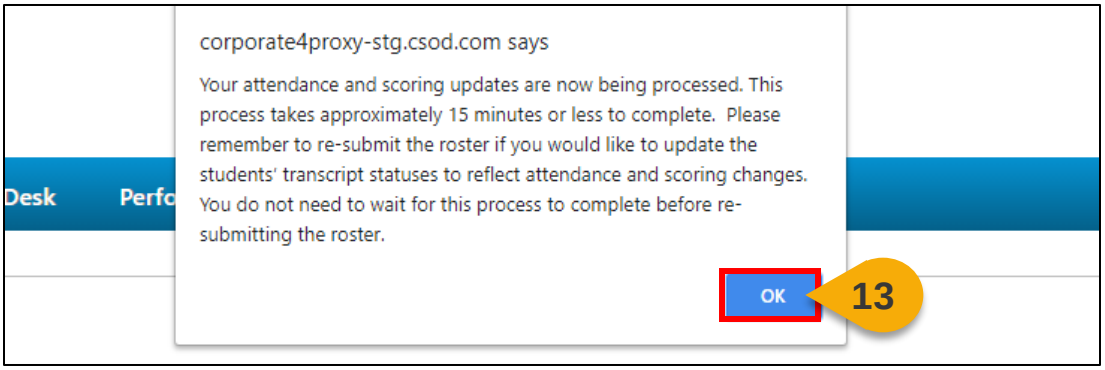


Upload Attendance (Cont.3)

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



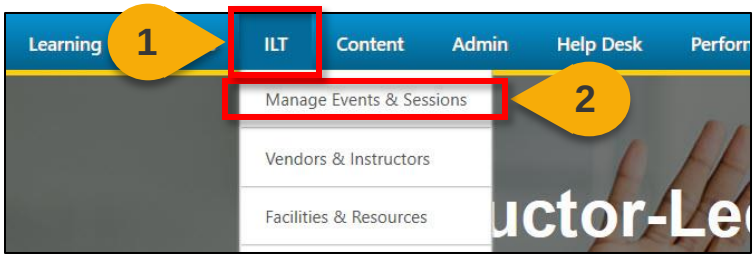
Step 13: A popup will appear to notify you that the attendance is being updated and that the process will take about 15 minutes. Click **Ok.**



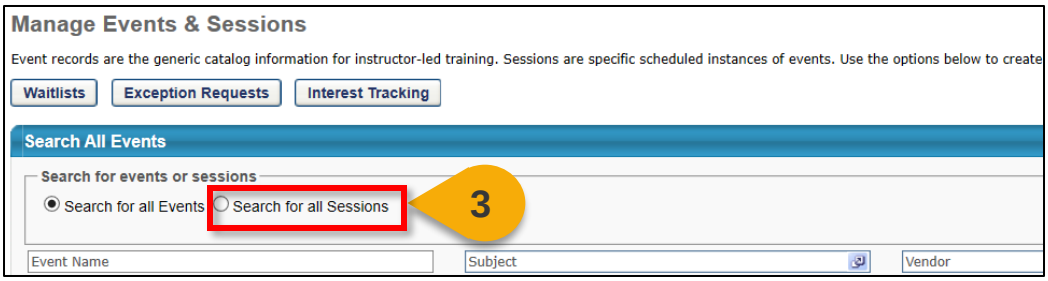
Manually Complete Attendance

When you want to manually update attendance in the Roster…

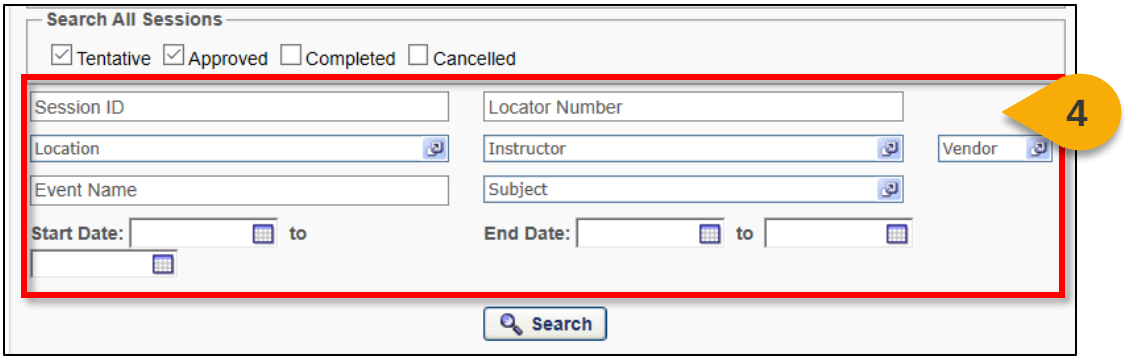
Steps 1 & 2: Hover over ILT, then select **Manage Events & Sessions.**



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

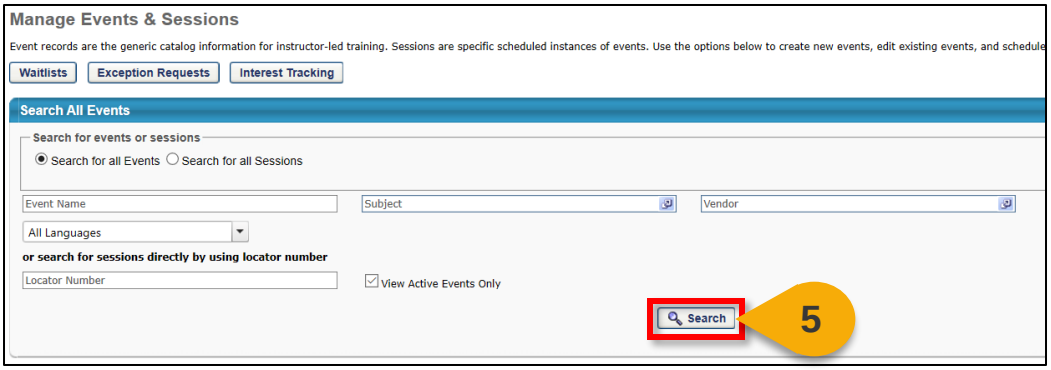


Step 4: Fill out the search criteria for the Session you wish to view.

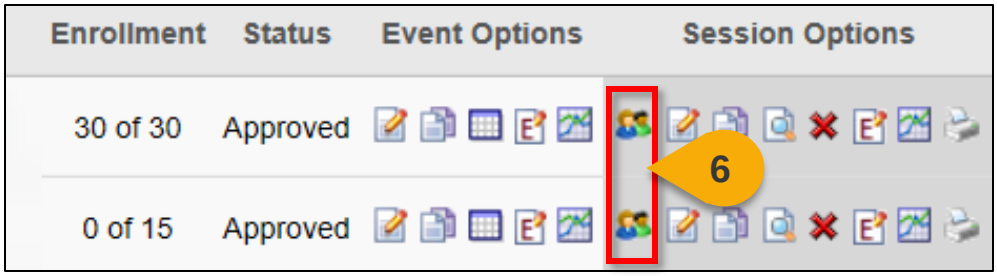


Manually Complete Attendance (Cont.1)

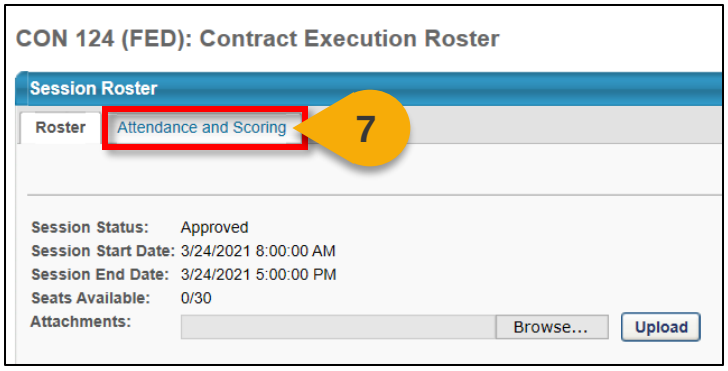
Step 5: Click **Search**.



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

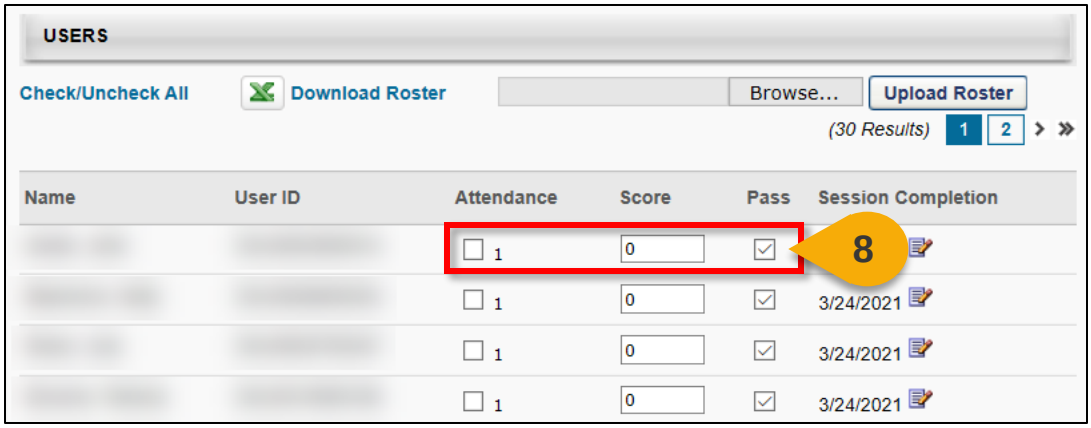


Step 7: Click the **Attendance and Scoring** tab.

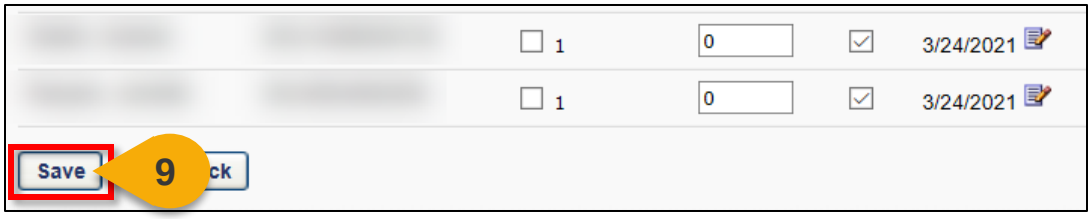


Manually Complete Attendance (Cont.2)

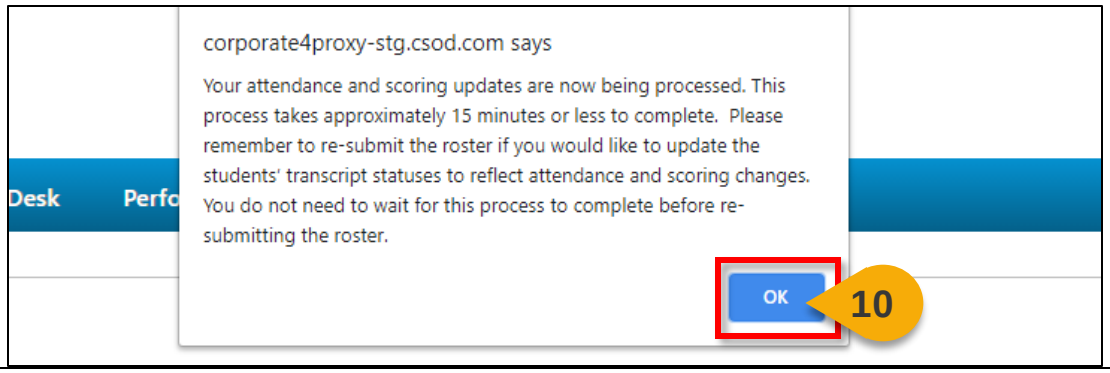
Step 8: For each user, mark the **Attendance, Score,** and **Pass** columns to update attendance.



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



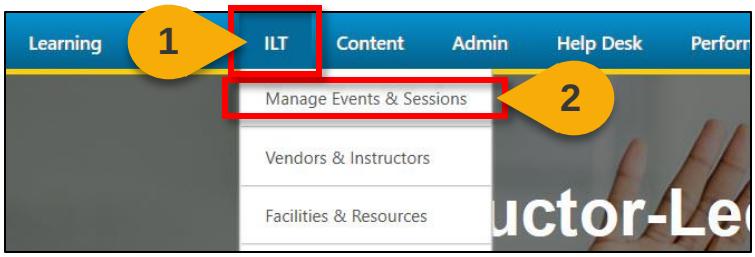
Step 10: A popup will appear to notify you that the attendance is being updated and that the process will take about 15 minutes. Click **Ok.**



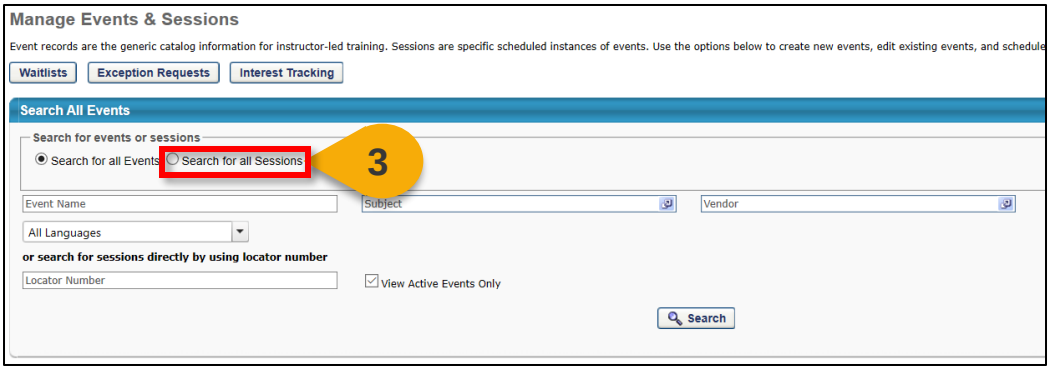
Move Users Between Sessions

When you want to move a User to another Session…

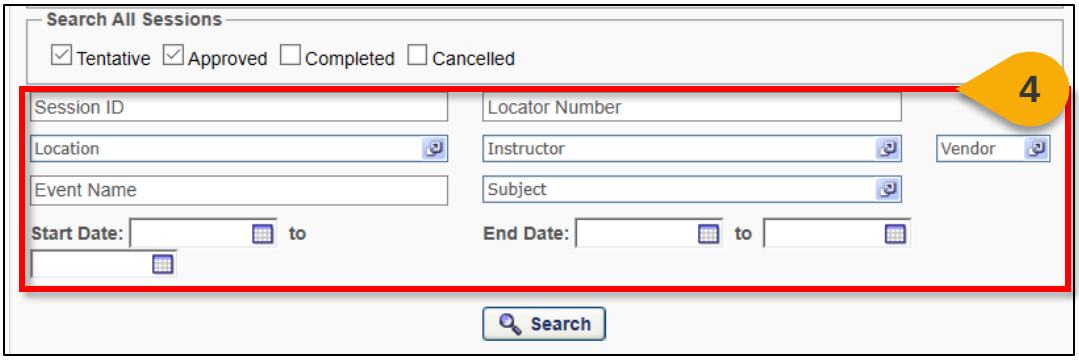
Steps 1 & 2: Hover over ILT, then select **Manage Events & Sessions.**



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

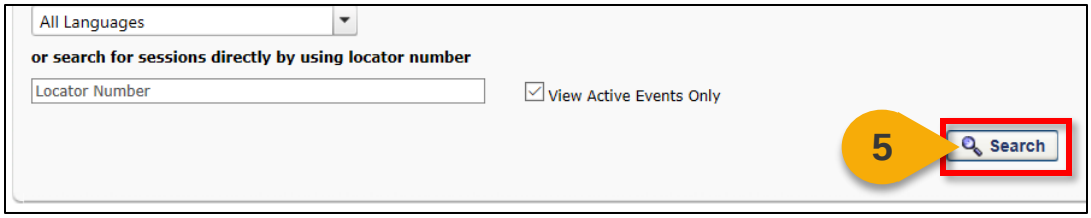


Step 4: Fill out the **search criteria** for the Session you wish to find.

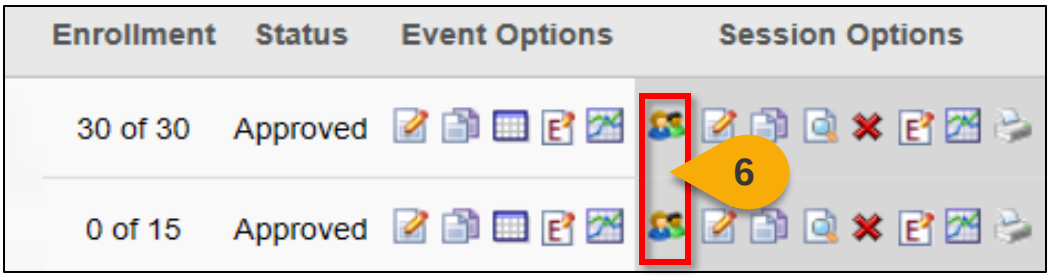


Move Users Between Sessions (Cont.1)

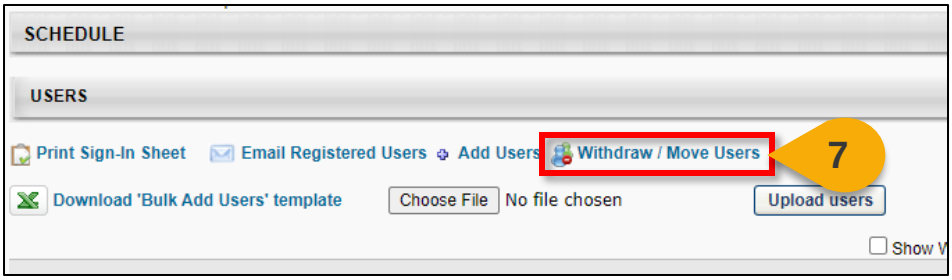
Step 5: Click **Search**.



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

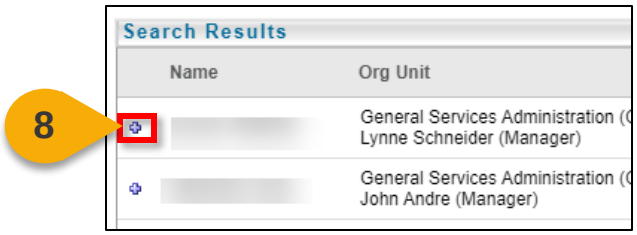


Step 7: In the Users panel, click the **Withdraw/Move Users** link.

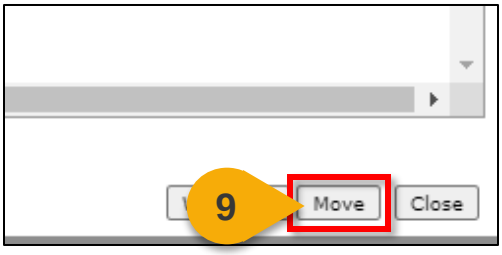


Move Users Between Sessions (Cont.2)

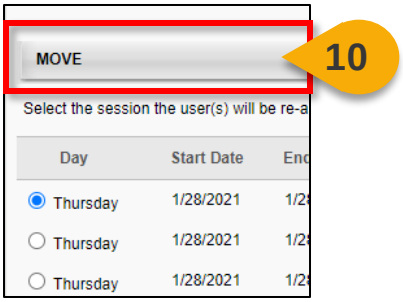
Step 8: In the Withdraw/Move Users window, click the **blue +** next to the Users you wish to move to different Session.



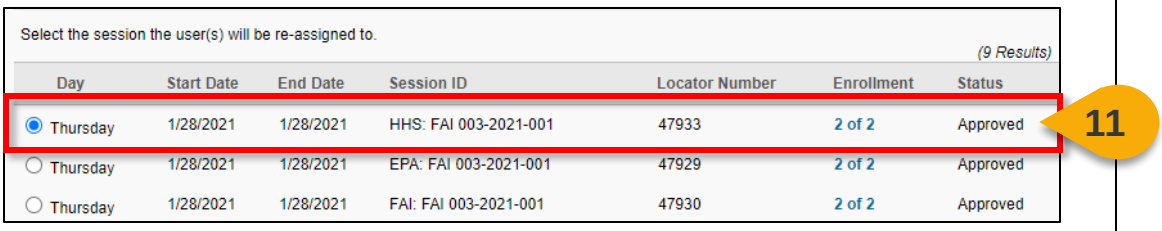
Step 9: After you have selected the desired Users, click **Move** at the bottom of the window.



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



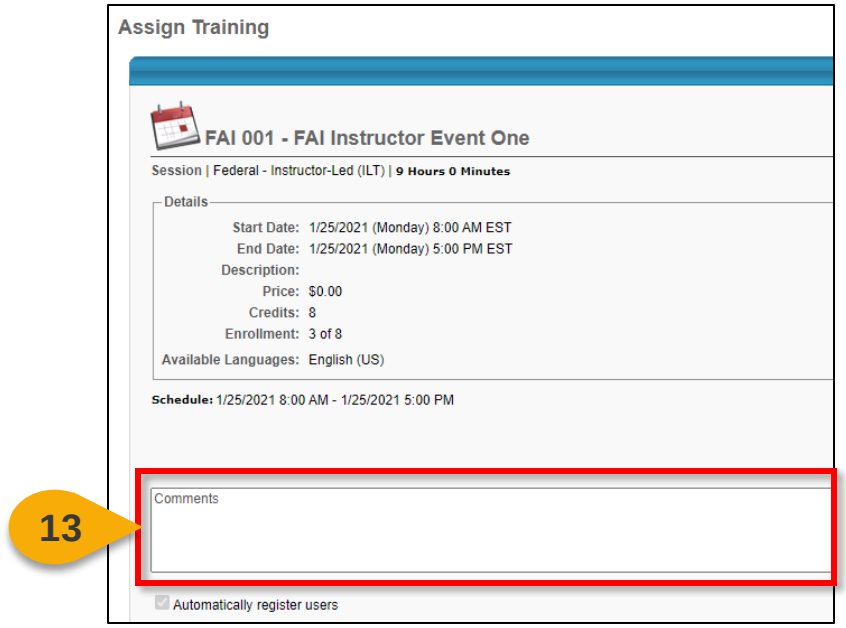
Step 11: Select **the Session** you would like to move the User(s) to.



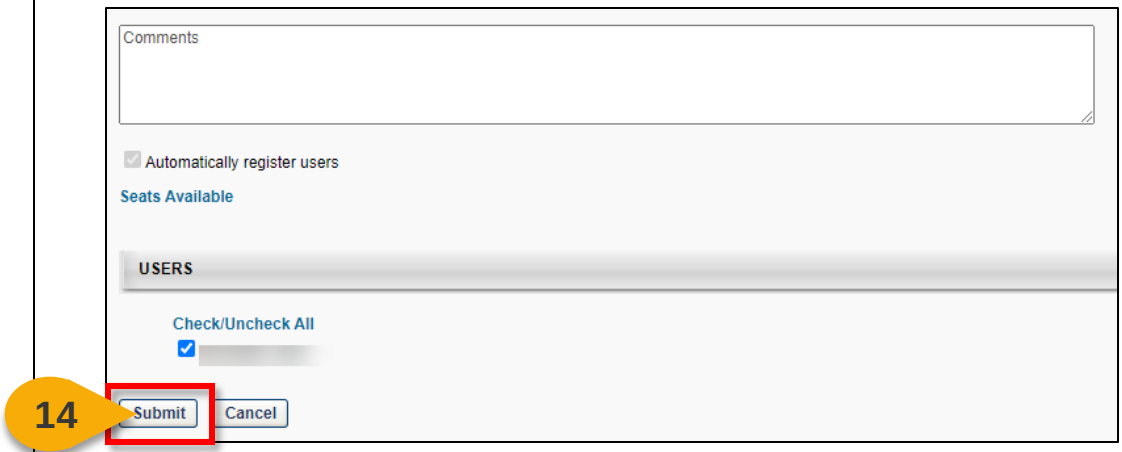
Step 12: Click **Submit and Continue**.

Move Users Between Sessions (Cont.3)

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



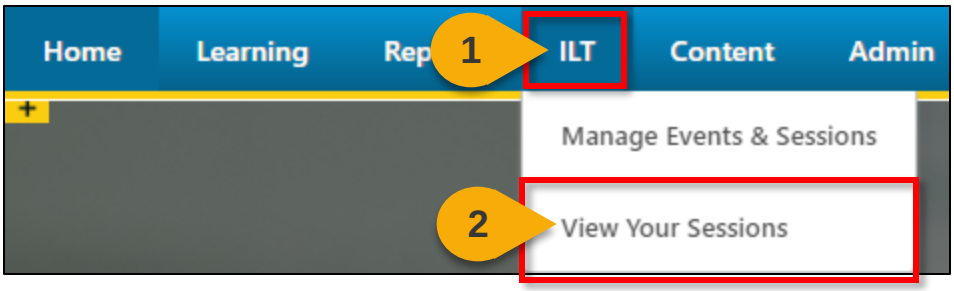
Step 14: Click **Submit** to enroll the User in the new Session. The User will now appear on the new Roster.



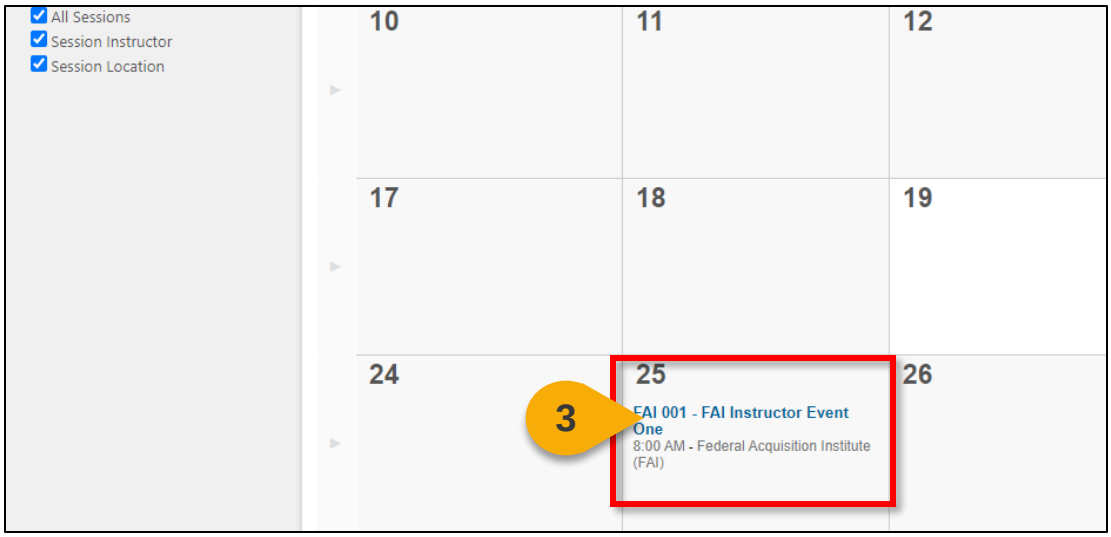
Send Emails from Roster

When you need to email students enrolled in a Session…

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

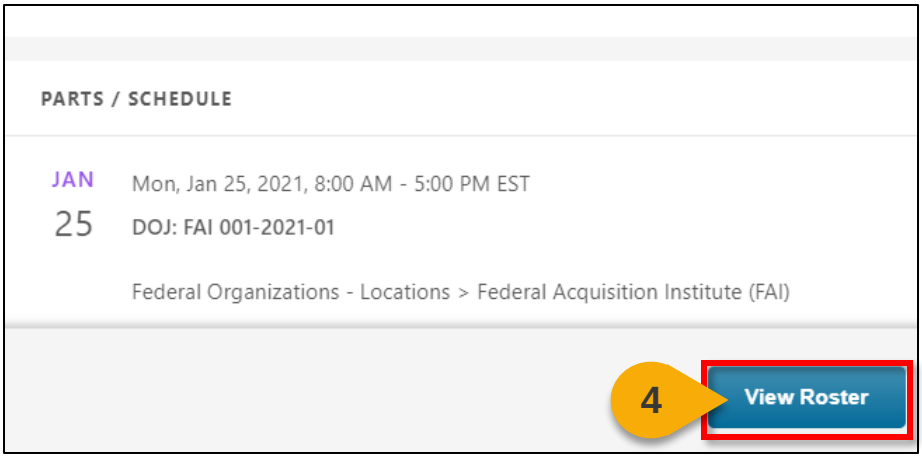


Step 3: Click the **Session** you wish to view the Roster for.

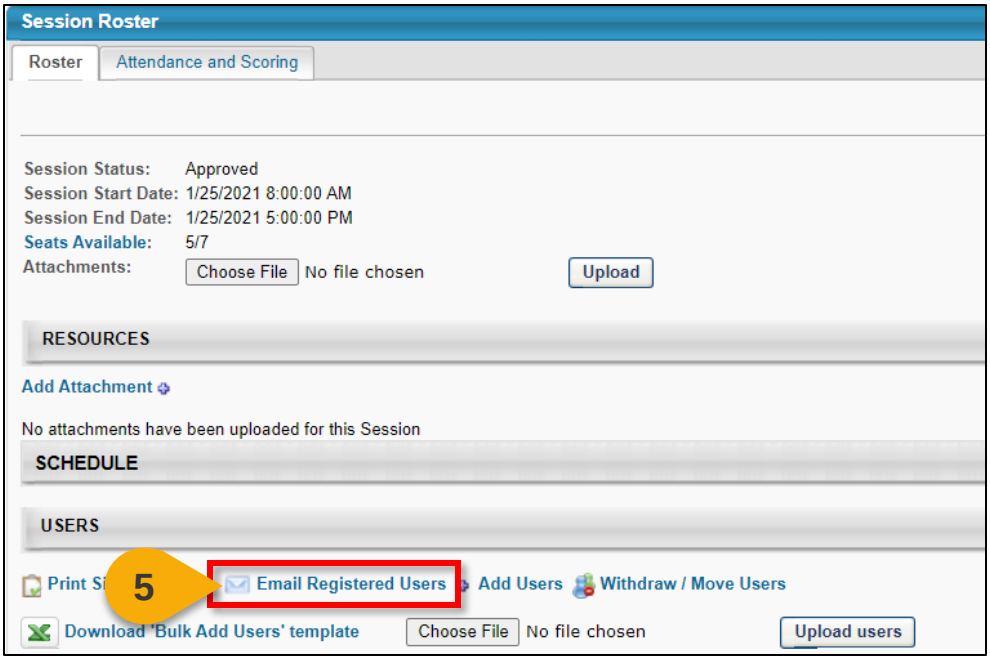


Send Emails from Roster (Cont.1)

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

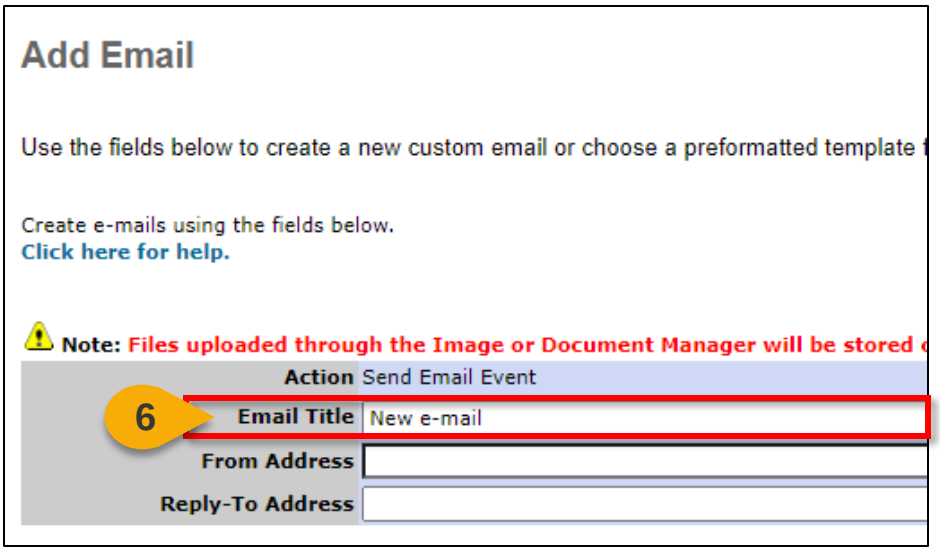


Step 5: On the Roster, click **Email Registered Users.**

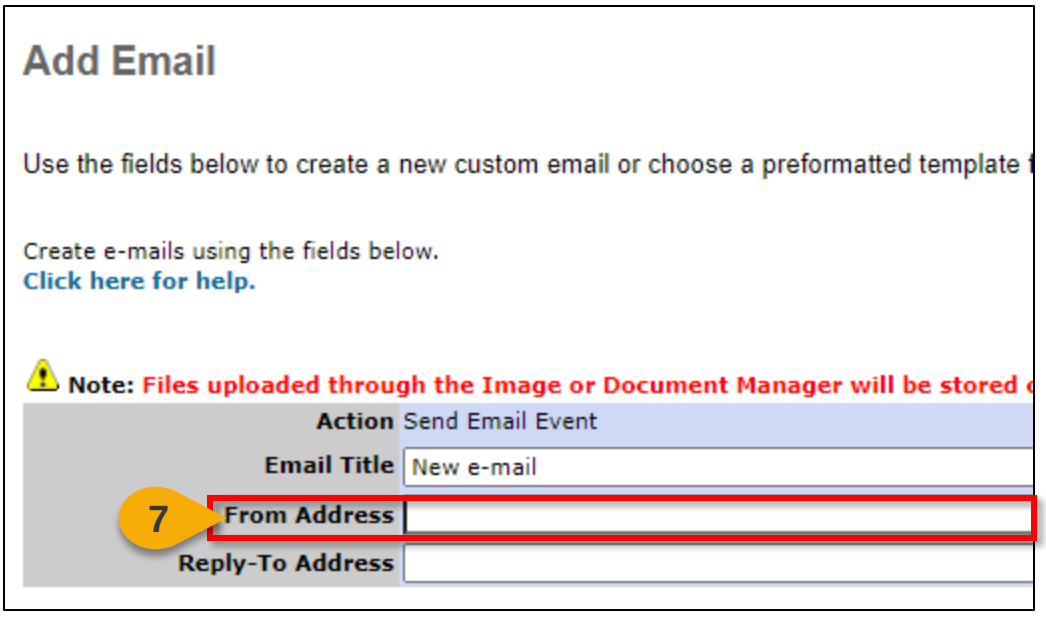


Send Emails from Roster (Cont.2)

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

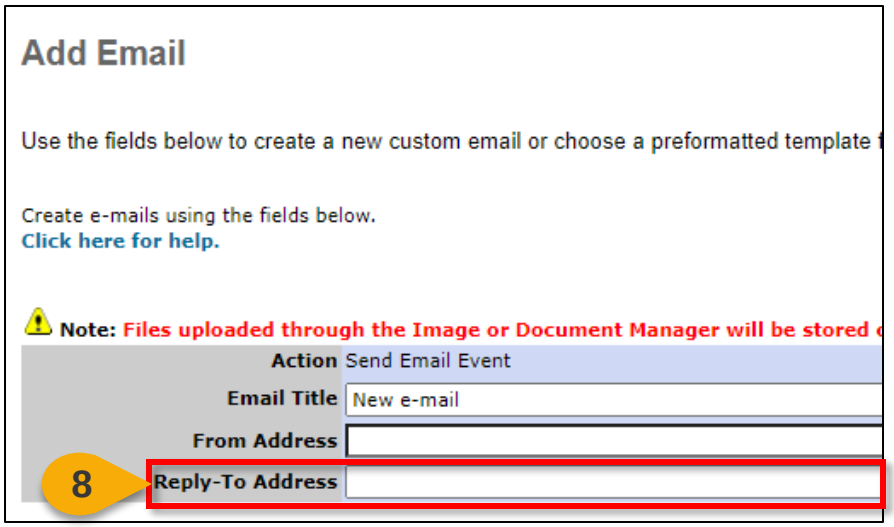


Step 7: Enter a **From Address**.

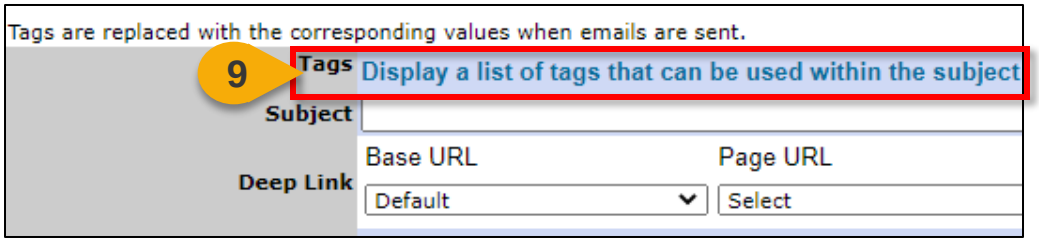


Send Emails from Roster (Cont.3)

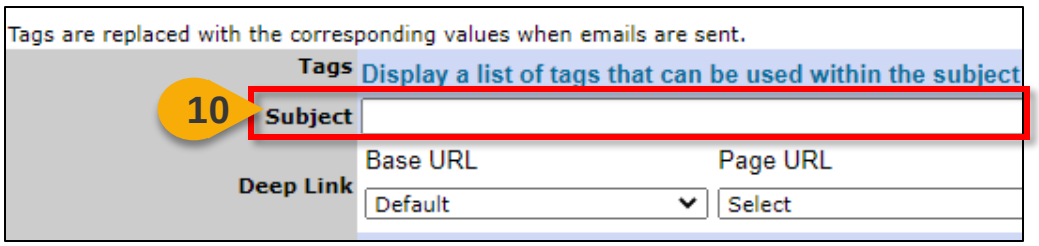
Step 8: Enter a **Reply-To Address** which recipients can respond.



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

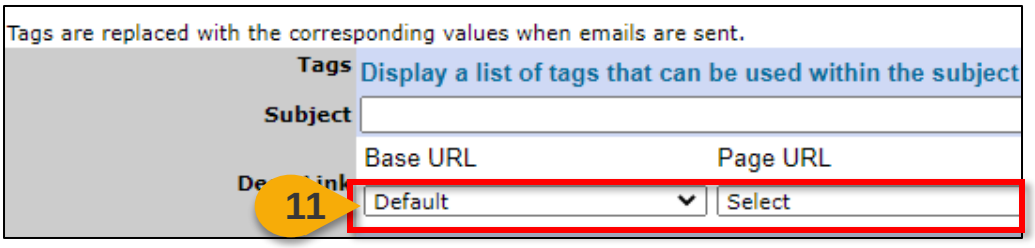


Step 10: Input the **Subject** of your email.

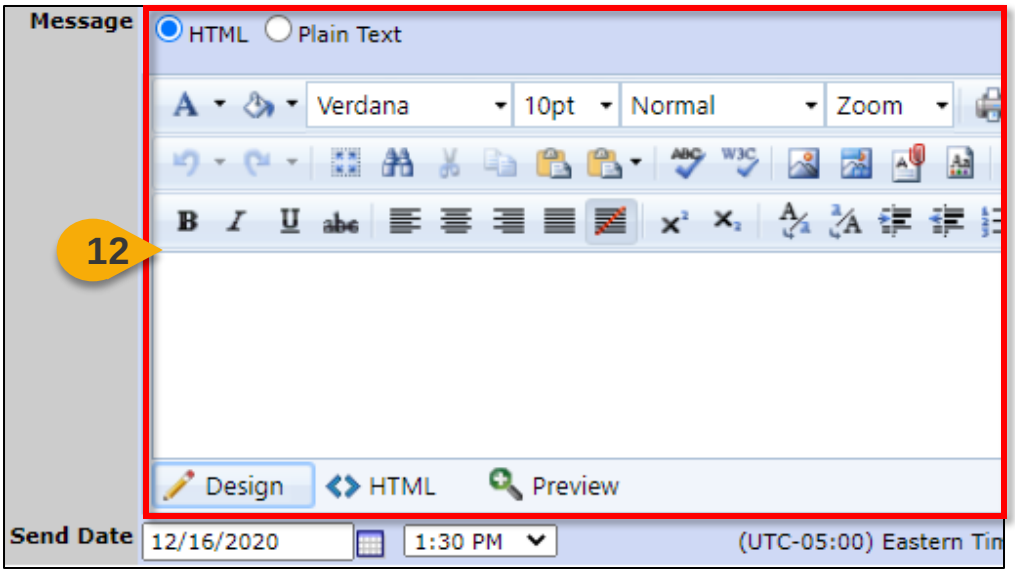


Send Emails from Roster (Cont.4)

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

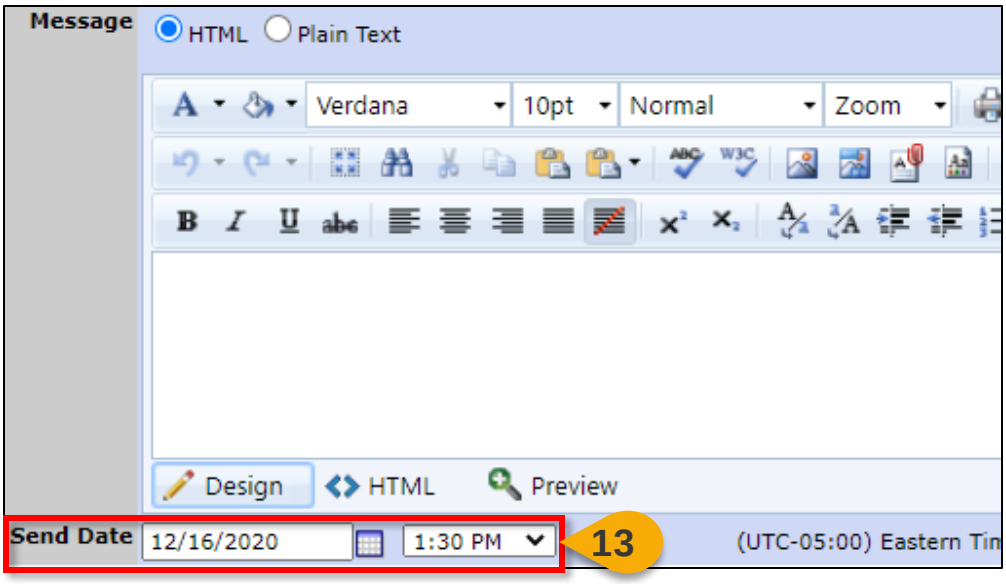


Step 12: Enter the body of the email into the **Message** field. This field is where you write in the body of your email. You can choose to send the email as Plain Text or in HTML.

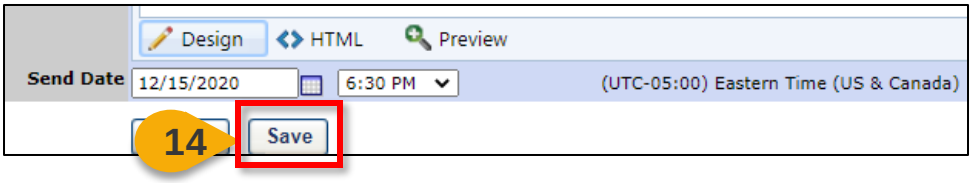


Send Emails from Roster (Cont.5)

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



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

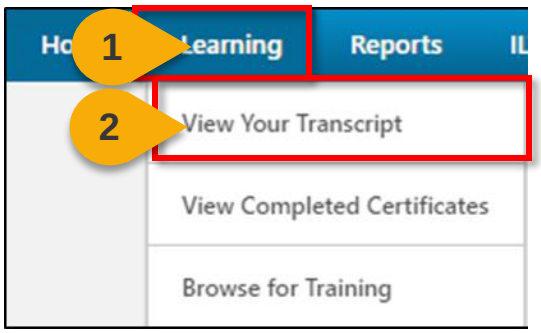


External Training

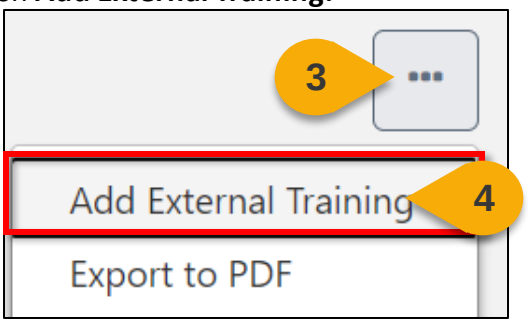
Request External Training Credit from Transcript

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

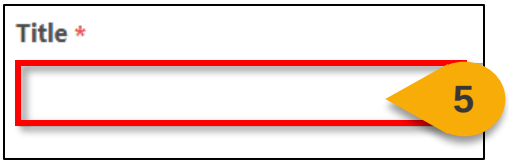
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript.**



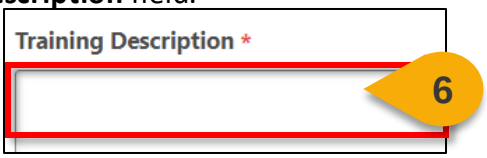
Steps 3 & 4: Click on the **ellipsis button** at the top left-hand corner. Then click on **Add External Training.**



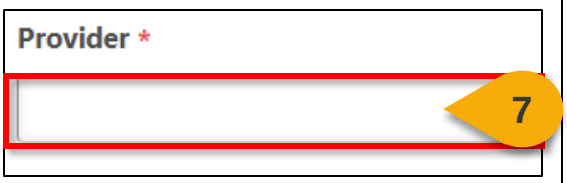
Step 5: Enter the title of your external training in the **Title** field.



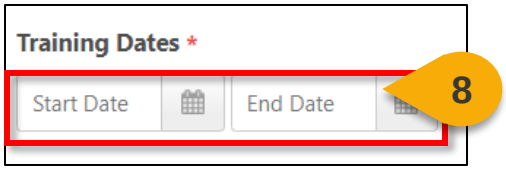
Step 6: Enter a description of the external training in the **Training Description** field.



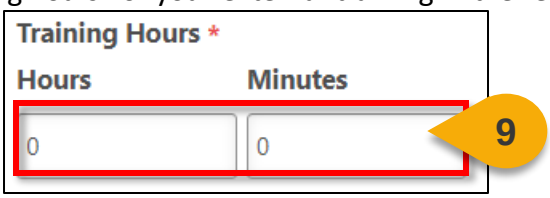
Step 7: Enter the name of the provider of the external training in the **Provider** field.



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

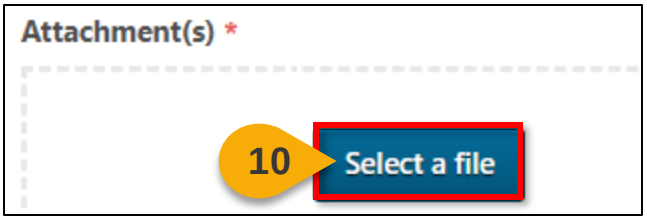


Step 9: Enter the training hours for your external training in the respective **Hours** and **Minutes** fields.

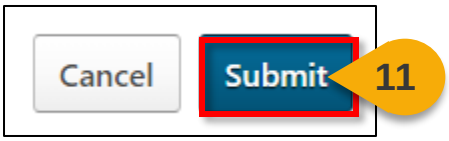


Request External Training Credit from Transcript (Cont.1)

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



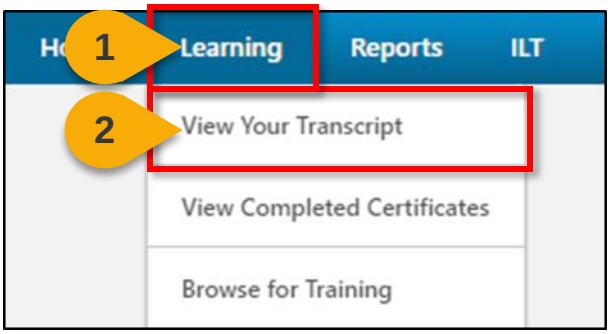
Step 11: Click **Submit** to submit the form for approval.



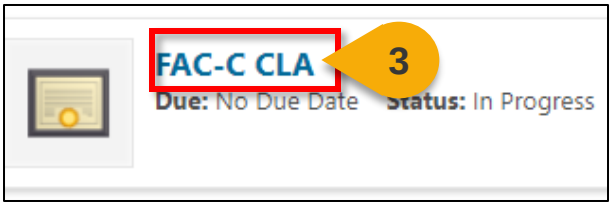
Request External Training Credit Within a Certification

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

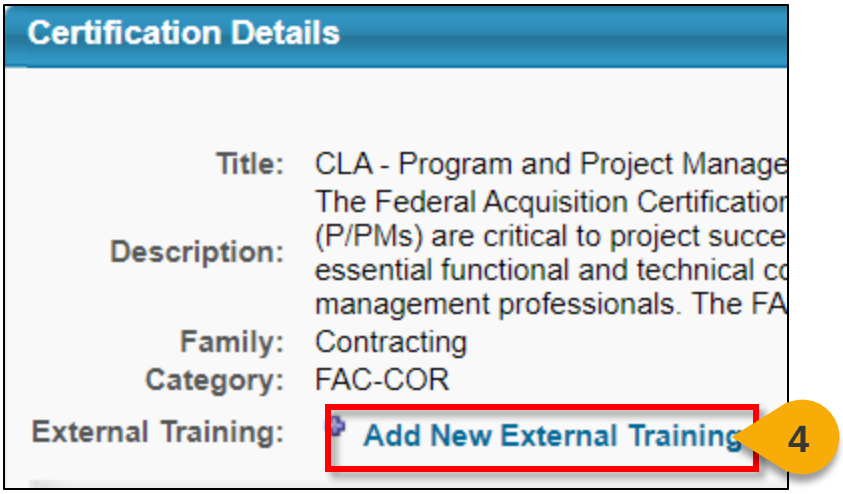
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript.**



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

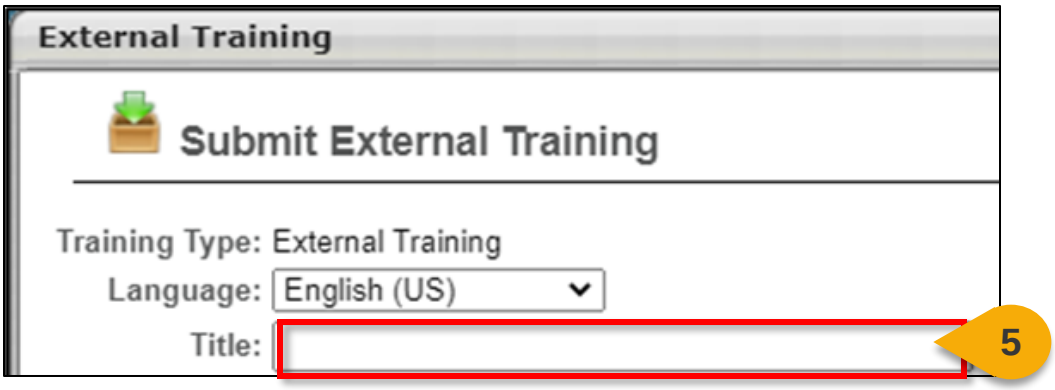


Step 4: Click on **Add New External Training.**

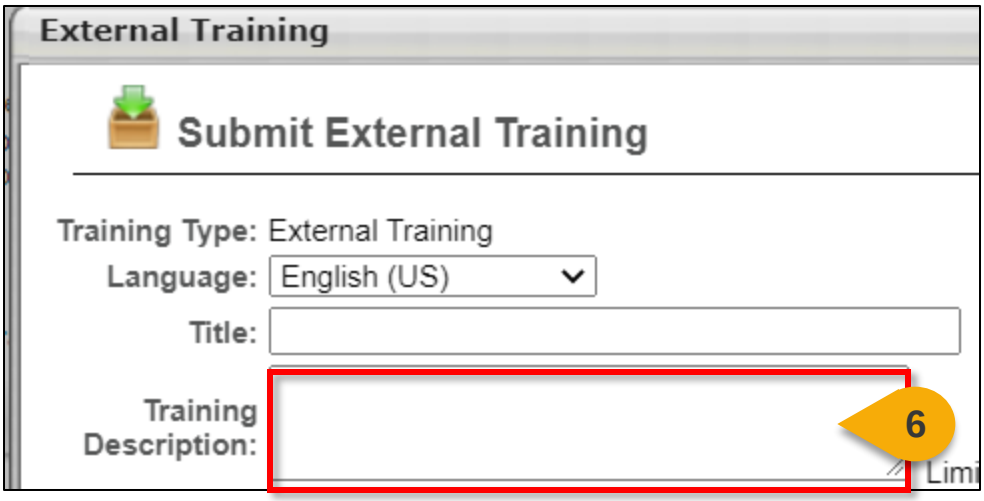


Request External Training Credit Within a Certification (Cont.1)

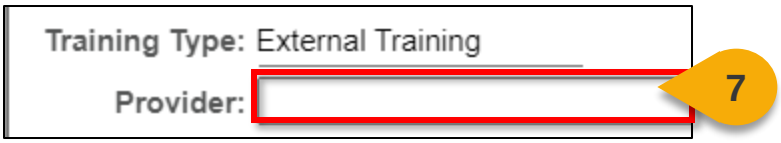
Step 5: A popup will appear. Enter the title in the **Title** field.



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



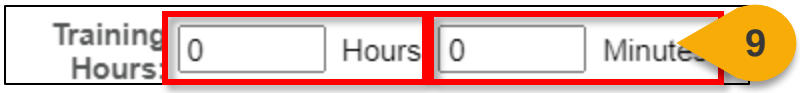
Step 7: Enter the name of the institution into the **Institution** field.



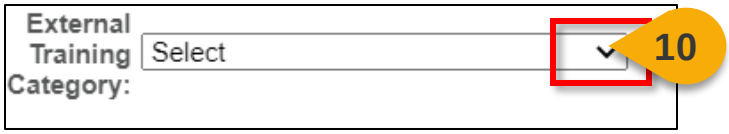
Request External Training Credit Within a Certification (Cont.2)

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

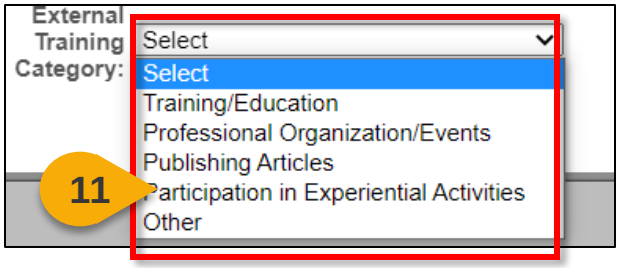
Step 9: Enter the number of hours and minutes of the external training into the **Training Hours** text fields.



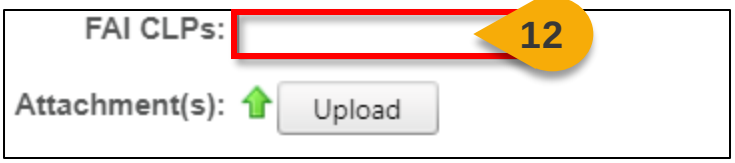
Step 10: Click the **dropdown button** next to the External Training category field



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



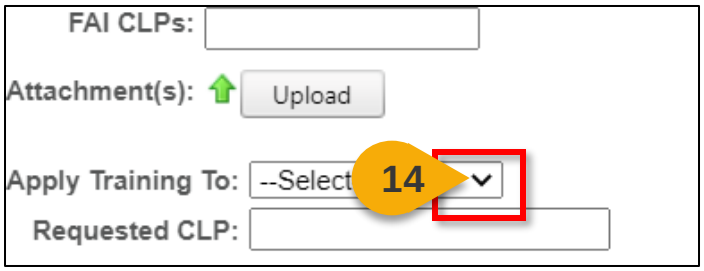
Step 12: Enter the number of CLPs into **the FAI CLPs** field.



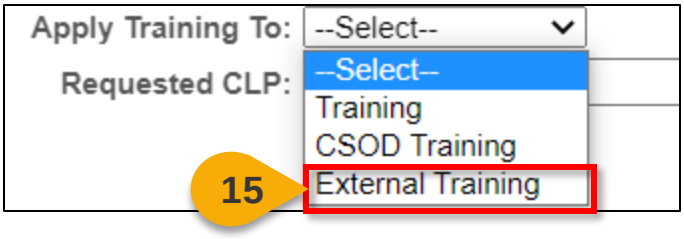
Request External Training Credit Within a Certification (Cont.3)

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

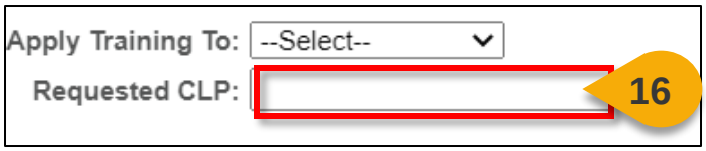
Step 14:: Click the **dropdown button** next to the Apply Training To field.



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

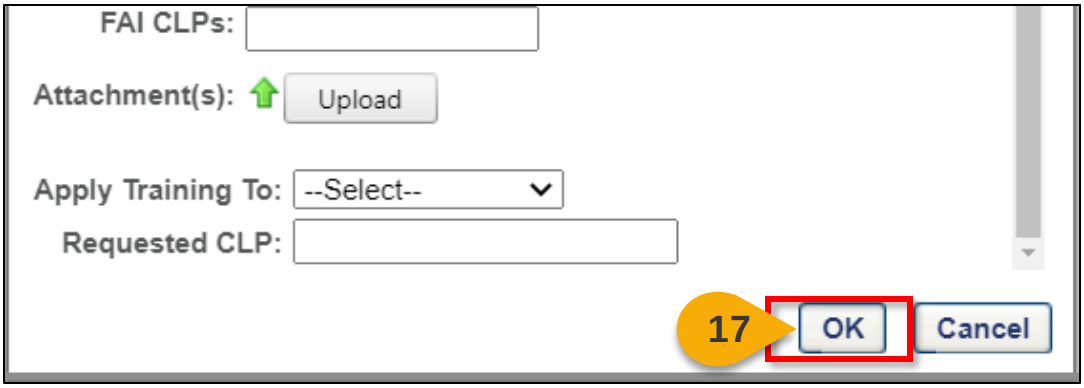


Step 16: Enter the **number of CLPs** earned in the Requested CLP field.



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

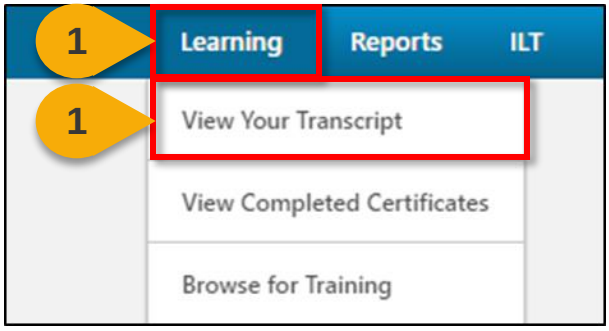
Step 17: Click **Ok** when you you've finished entering the information on your external training. This will submit the form to an External Training Approver.



Add External Training to a Certification

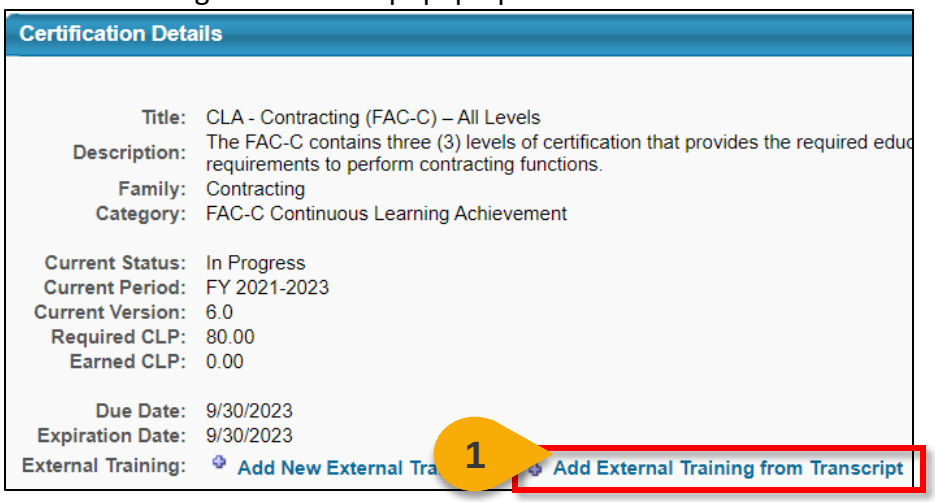
When you want to submit external training from your transcript to fulfill a certification requirement…

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



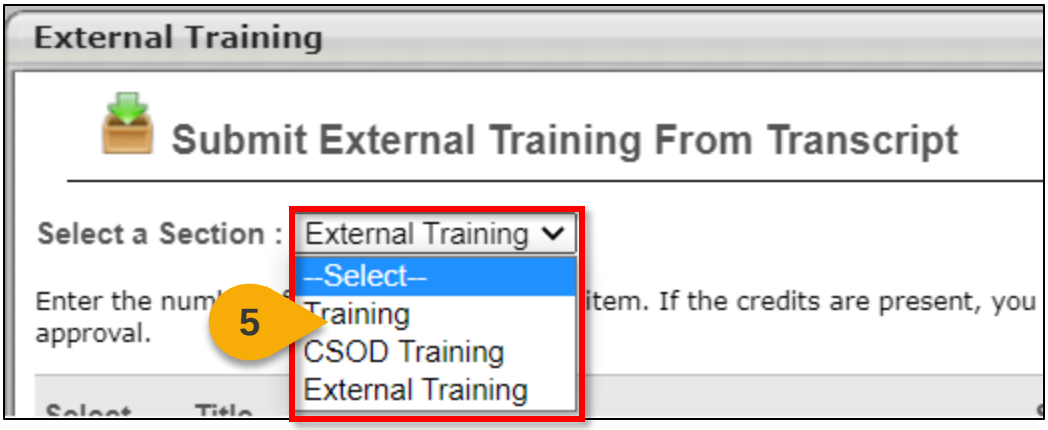
Step 3: Click on the **title** of the Certificate to which you'd like to add your external training.

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

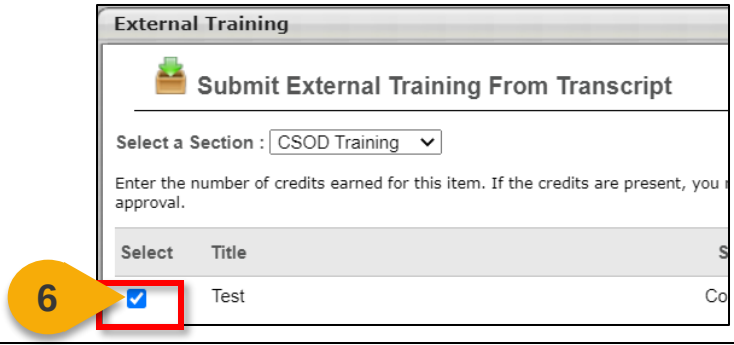


Add External Training to a Certification (Cont.1)

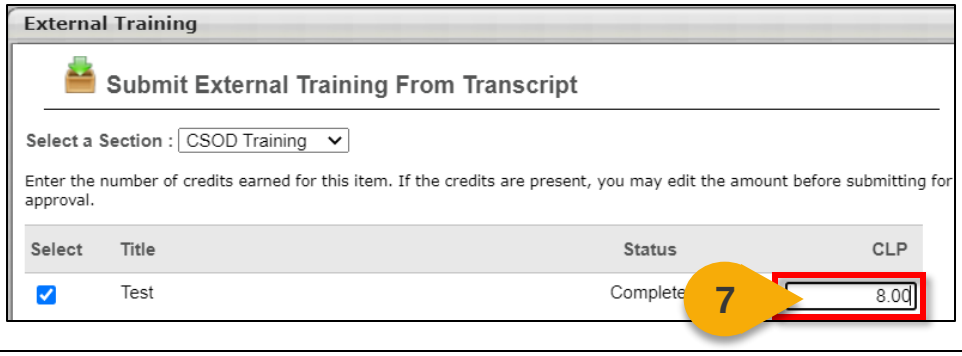
Step 5: Click the dropdown next to Select a Section to choose the section of the .certificate that the training will be applied to



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

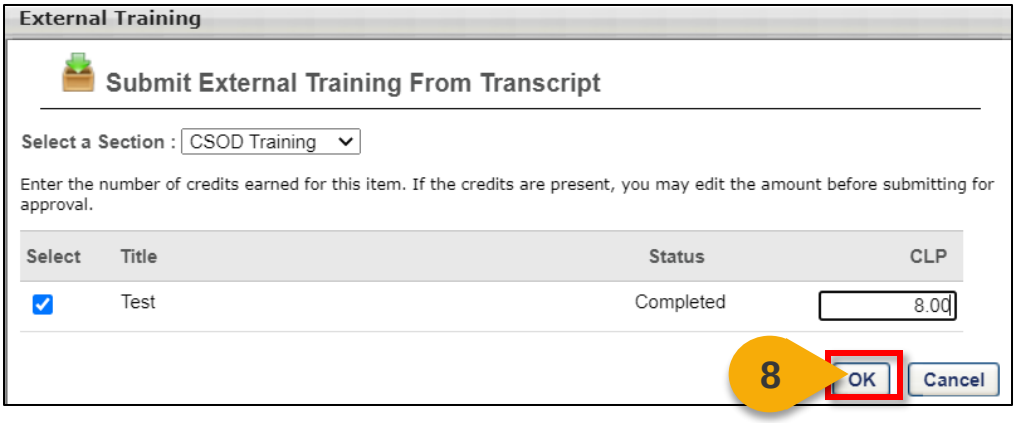


Step 7: In the **CLP** field to the right of the training item, enter the number of credits that were earned from the External Training.

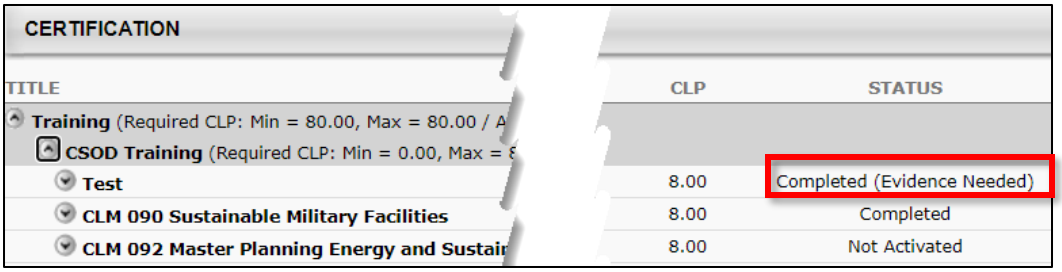


Add External Training to a Certification (Cont.2)

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



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

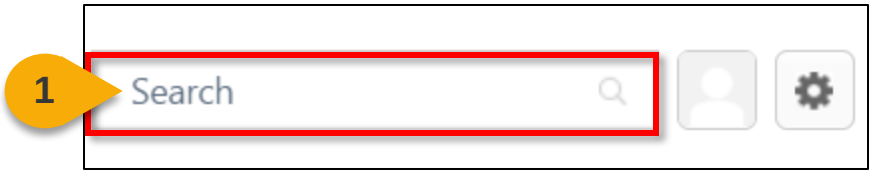


Certifications

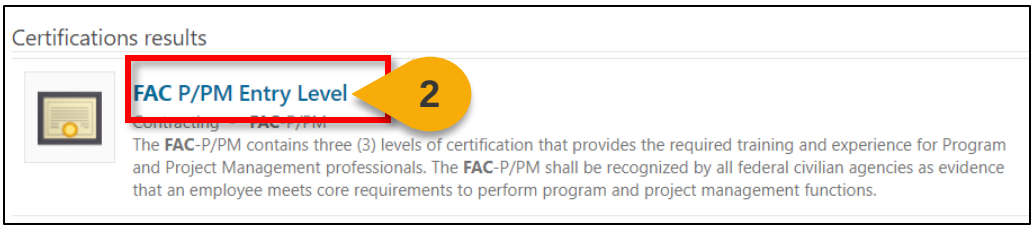
Request and Manage a Certification

When you want to request a Certification…

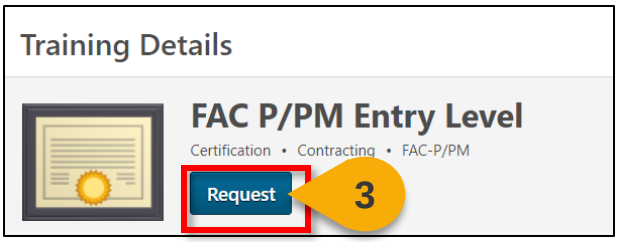
Step 1: In **Global Search**, type in the Certification you wish to request and click the **Magnifying Glass**.



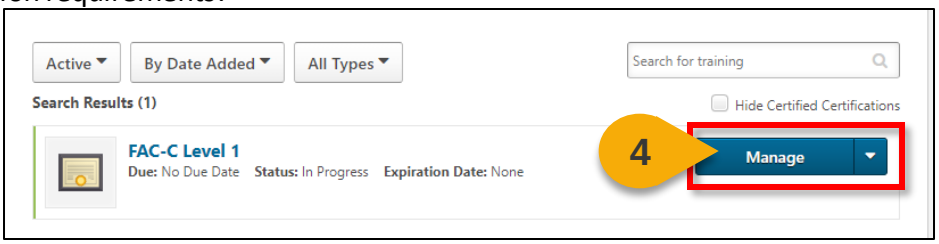
Step 2: Click on the Certification you'd like in the results.



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

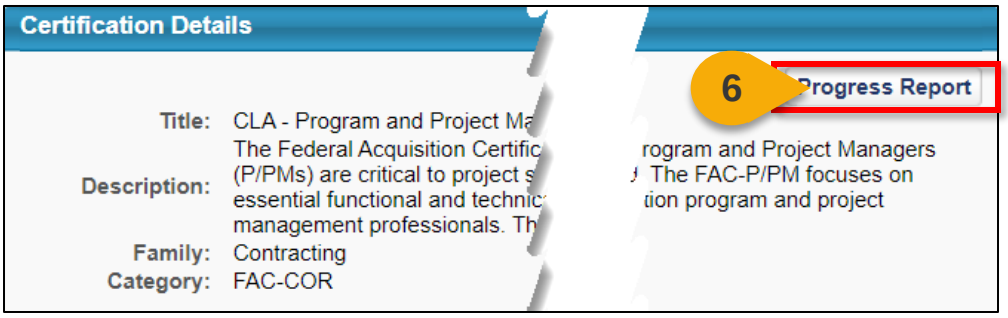


Step 4: You will be directed to your Transcript page. The Certification will be listed on the screen under Active courses with "In Progress" status. Click **Manage** to view the Certification requirements.

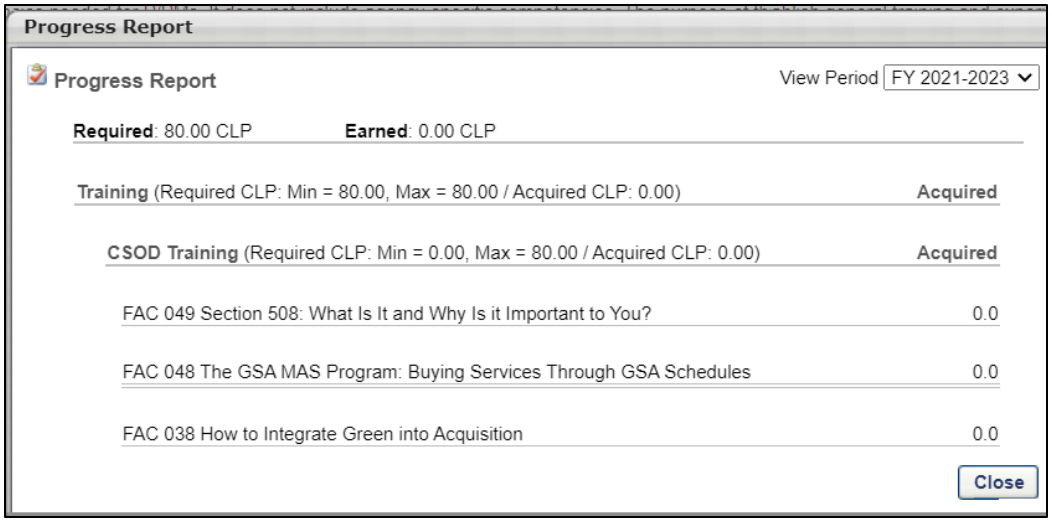


Request and Manage a Certification (Cont.1)

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



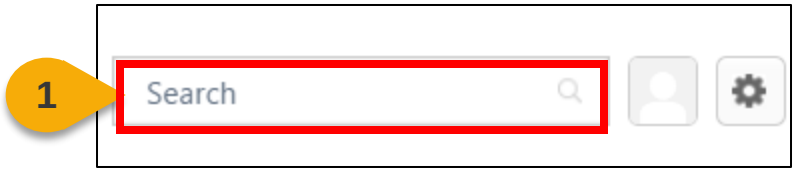
A popup window will appear that displays the required CLPs, the CLPs earned so far, and list of trainings needed to complete the certification.



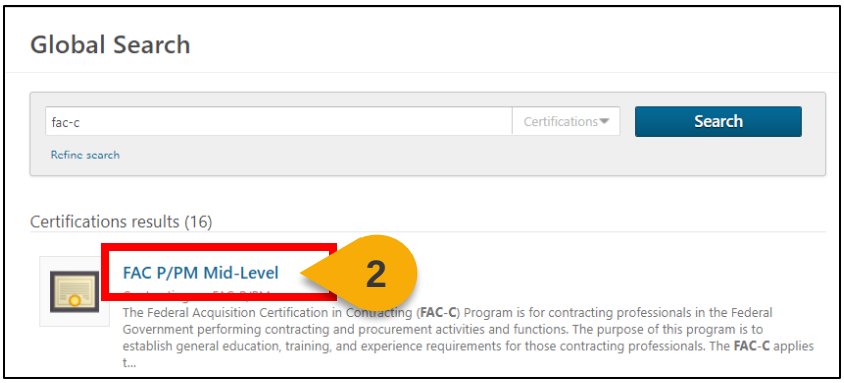
Assign Certifications

When you want to assign a certification to your subordinates….

Step 1: Search for the certification you would like to assign using Global Search, which is located at the upper right-hand corner of the page.



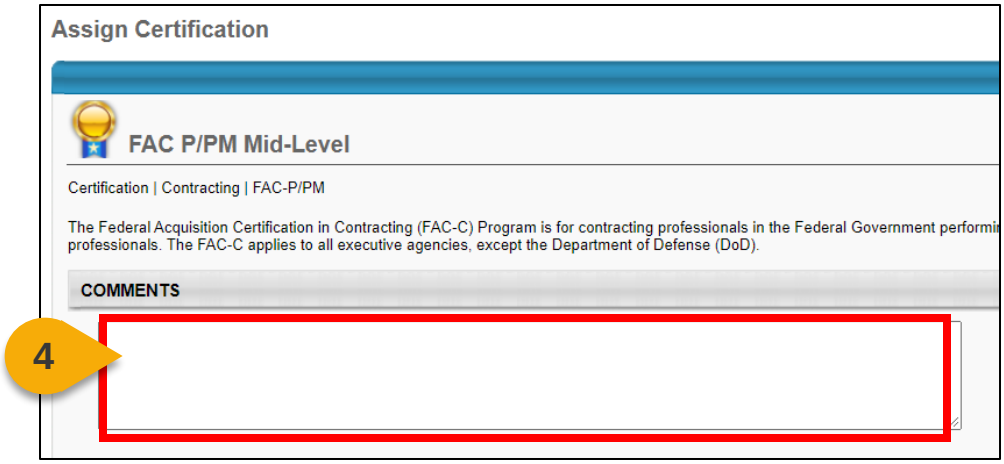
Step 2: Click on the **title** of the certification you'd like to assign.



Step 3: Click **Assign.**

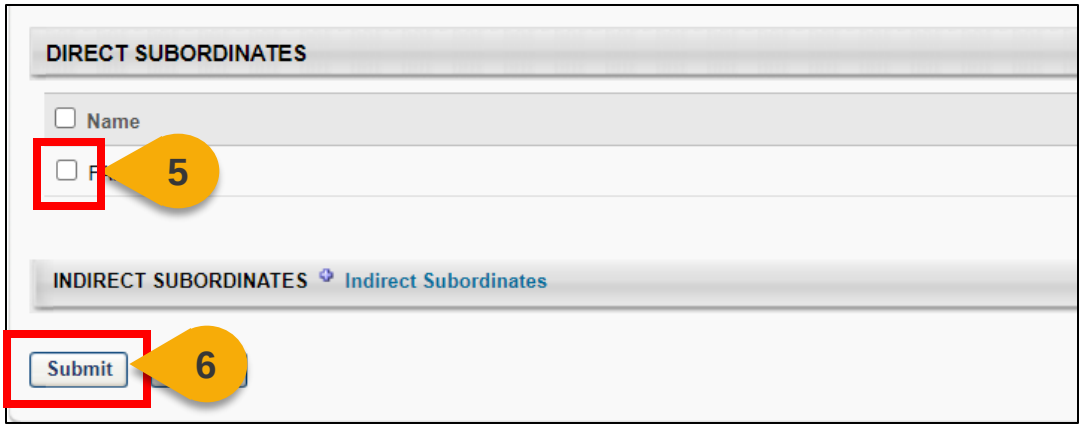
Assign Certifications (Cont.1)

Step 4: Enter any comments as needed in the **Comment Box.**



Step 5: Select the subordinates you want to assign the certification to by clicking the **checkbox** next to their name. You can assign to both direct and indirect subordinates.

Step 6: Click **Submit**.

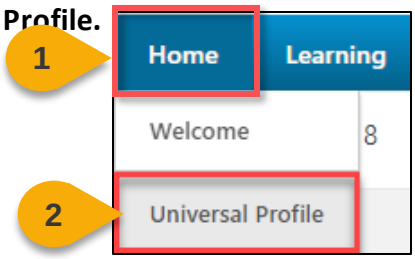


Checklists and Forms

View Submitted Forms

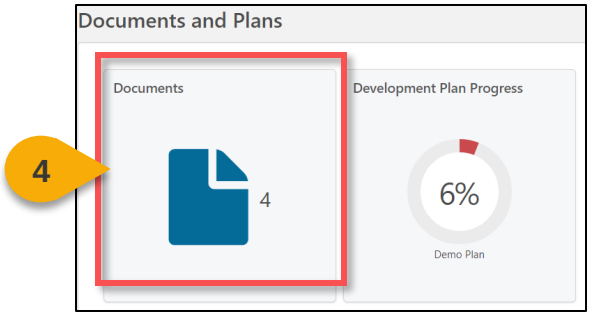
When you want to see the forms you've submitted…

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

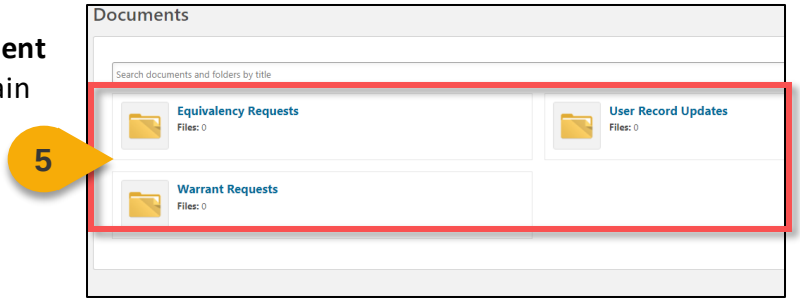


Step 3: Click on **Documents and Plans.**

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



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



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

Warrant Requests: Contains Warrant Forms you have submitted.

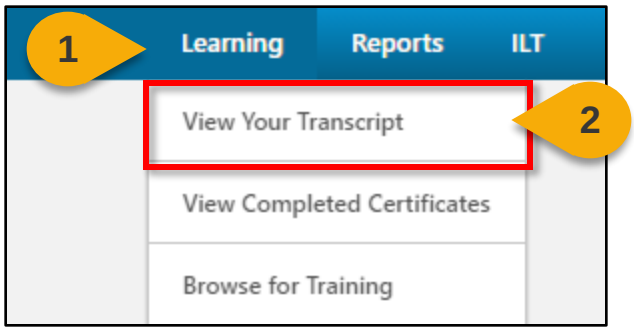
User Record Updates: Contains User Record Update Forms you have submitted.

Request Education/Experience Verification

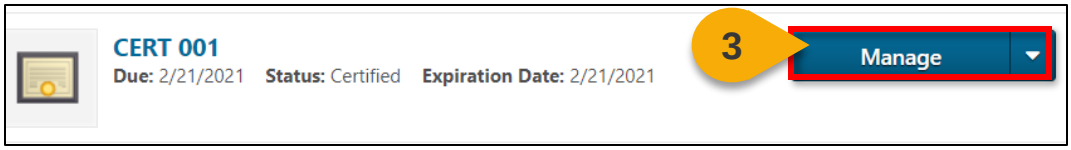
When you need to submit an Education or Experience Verification Checklist for a Certification…

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

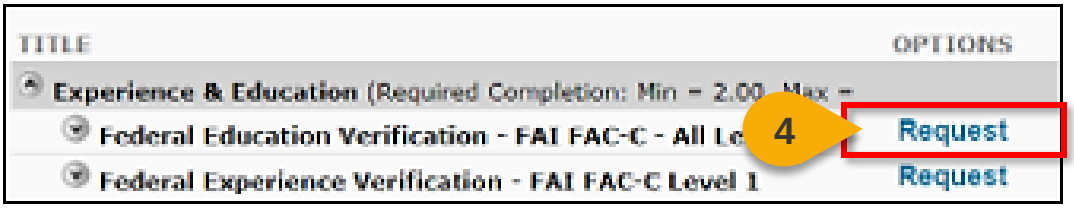
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript.**



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



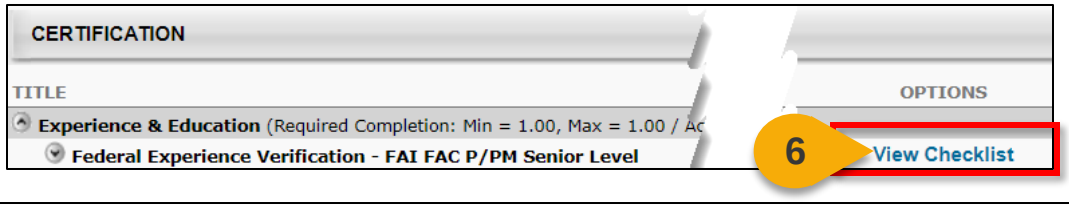
Step 4: Scroll down until you see **Experience and/or Education Verification** and click **Request**.



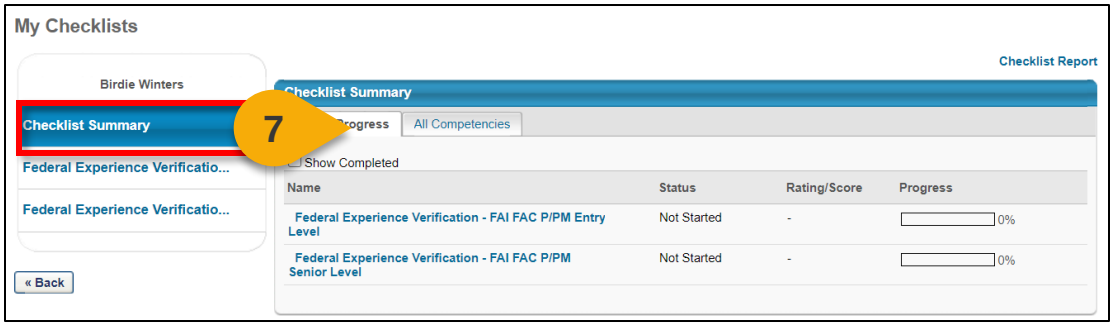
Request Education/Experience Verification (Cont.1)

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

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

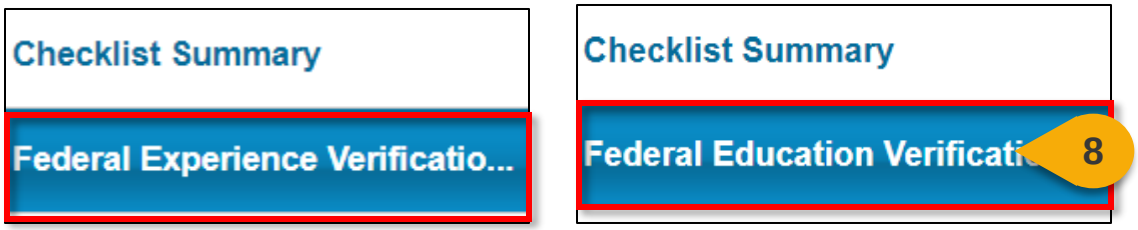


Step 7: Click on **Checklist Summary** to view the overall progress of any checklists associated with a certification.

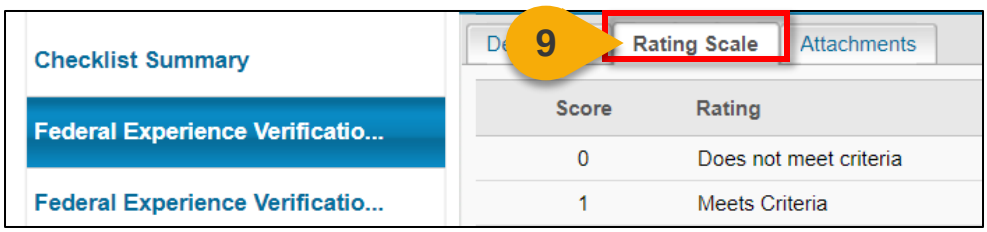


Request Education/Experience Verification (Cont.2)

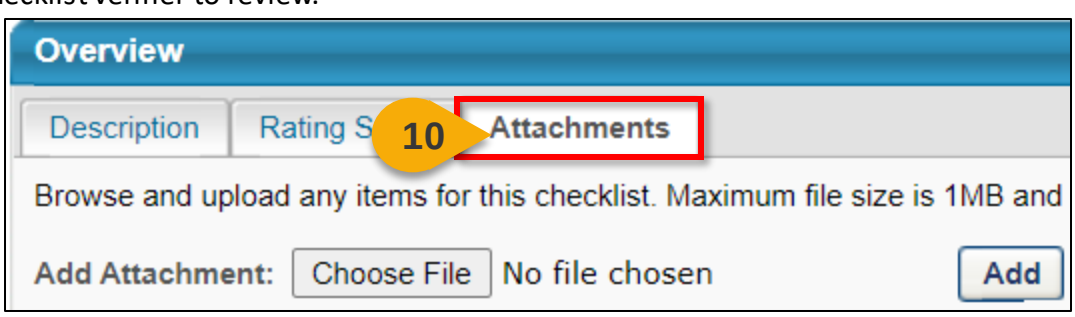
Step 8: Click on **Federal Education/ Experience Verification** to view instructions for the checklist.



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

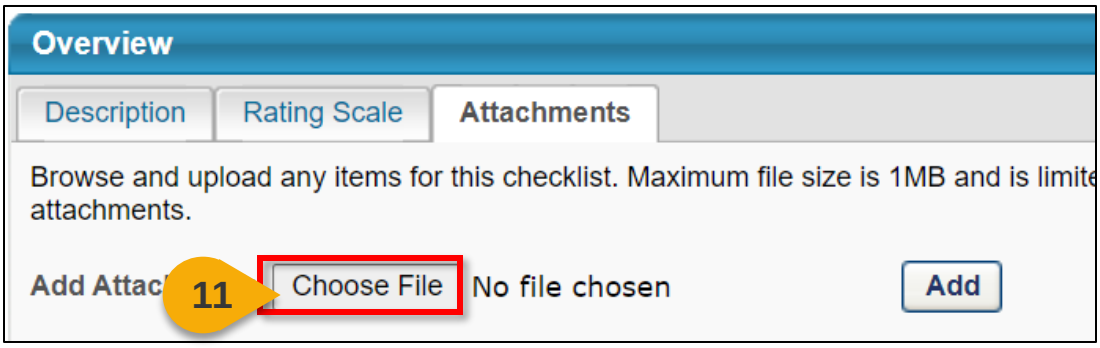


Step 10: Click on the **Attachments** tab to upload any necessary documents for the checklist verifier to review.

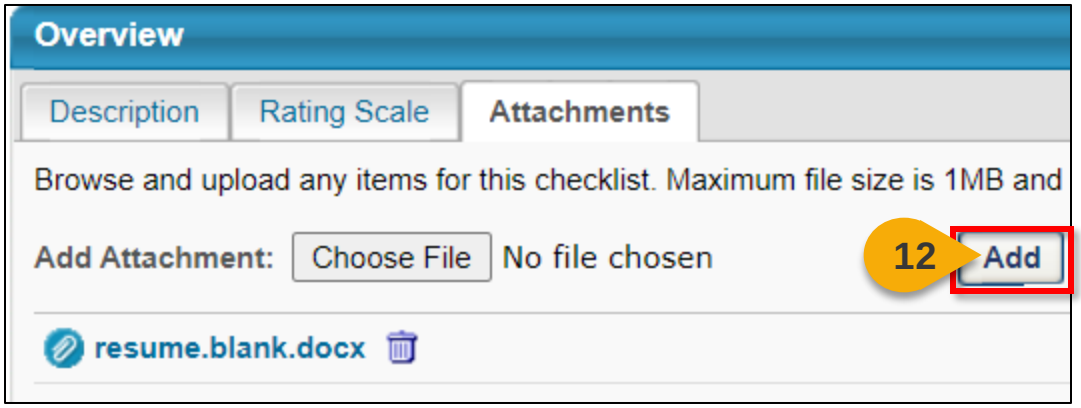


Request Education/Experience Verification (Cont.3)

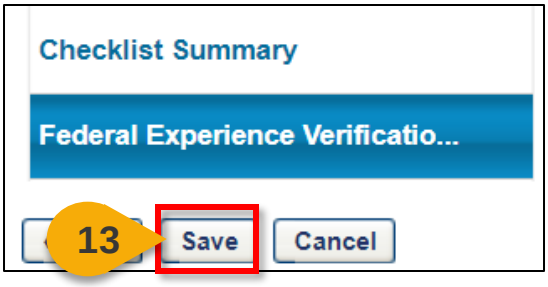
Step 11 : Click **Choose File** to add a copy of your resume or other relevant documents.



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



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

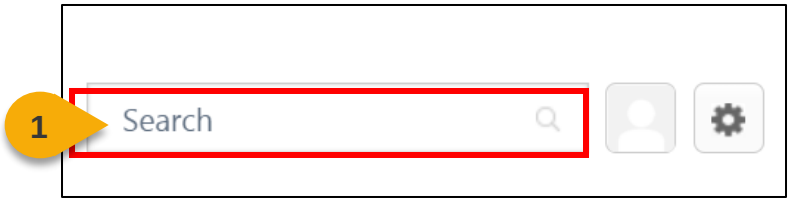


Submit an Equivalency/Fulfillment Form

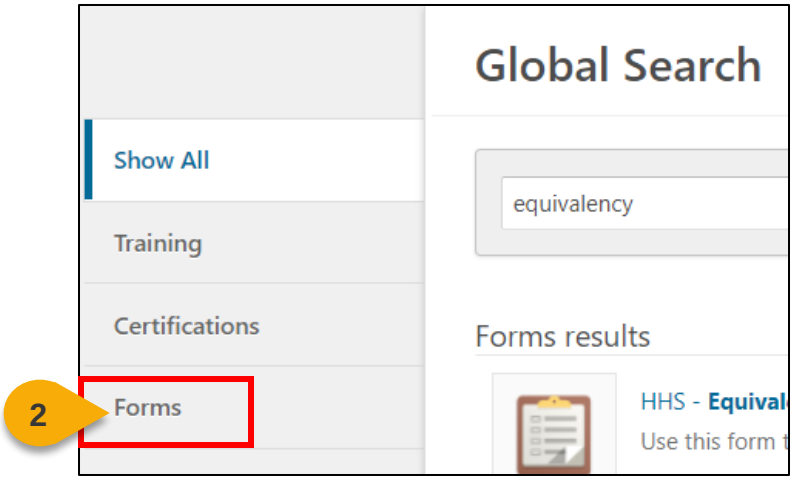
When you want to request Equivalency or Fulfilment for a Course…

Use Global Search to find the Equivalency/Fulfillment form.

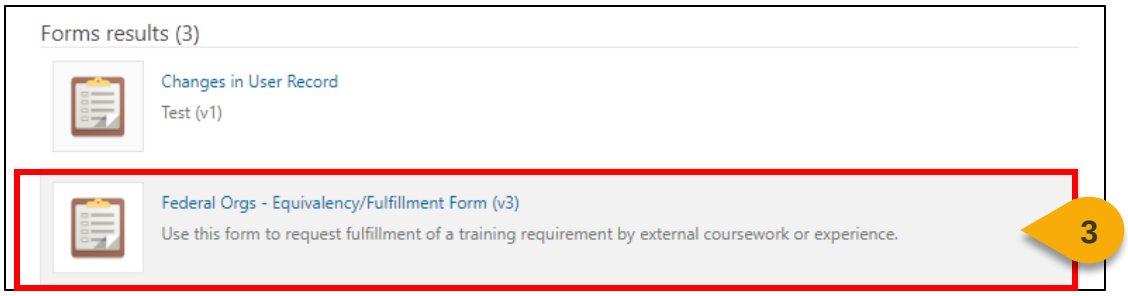
Step 1: Enter **Equivalency** in the Search box and click the Magnifying Glass.



Step 2: Click on **Forms.**

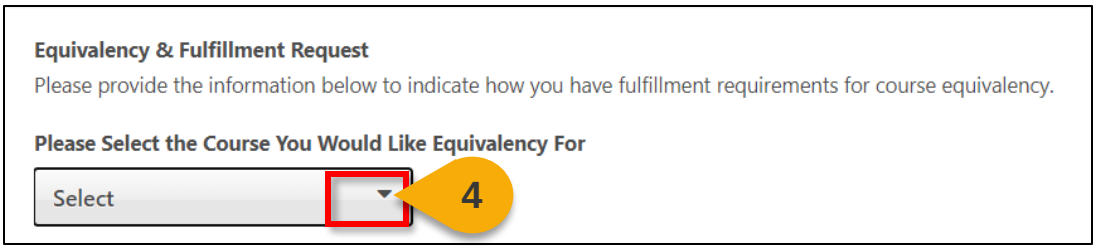


Step 3: Click on the **Equivalency/Fulfillment Form** for your agency.

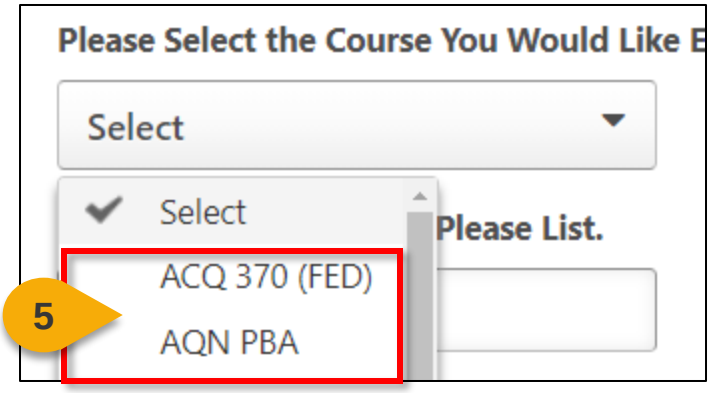


Submit an Equivalency/Fulfillment Form (Cont.1)

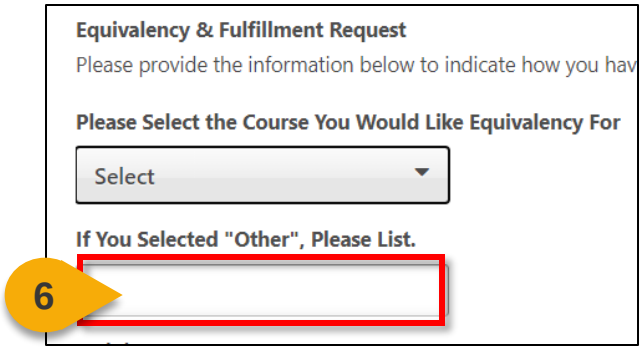
Step 4: Select the **dropdown arrow** to choose the course for which you would like an equivalency.



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

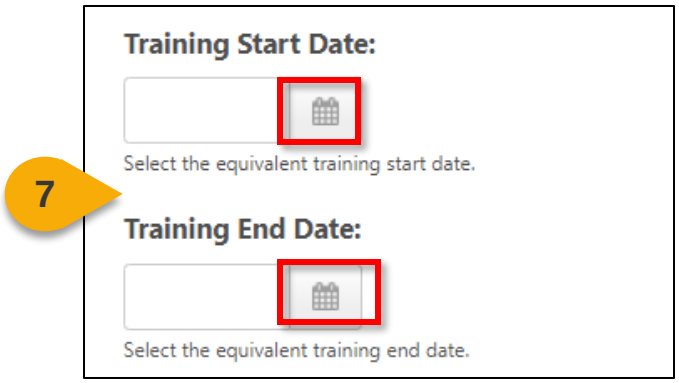


Step 6: If the course you are trying to request an equivalency for is not available, you can enter it in the **Other** textbox.

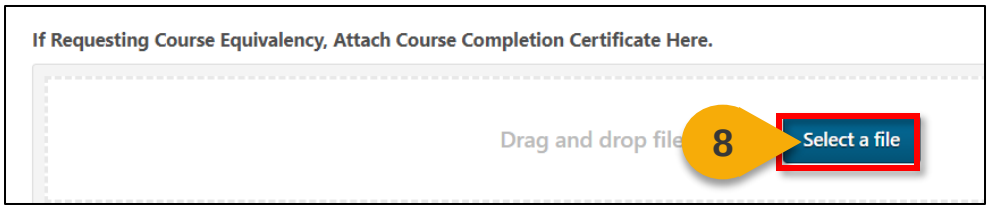


Submit an Equivalency/Fulfillment Form (Cont.2)

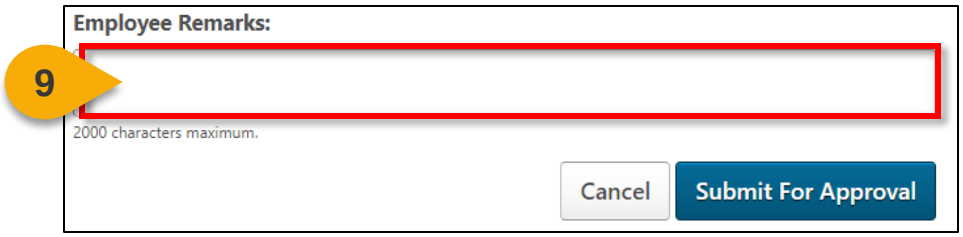
Step 7: Click the **calendar** icon to enter the Training Start and End dates.



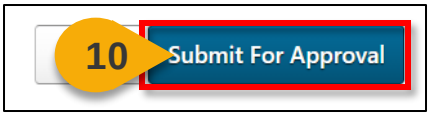
Step 8: Click **Select File** to add any supporting documentation.



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



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

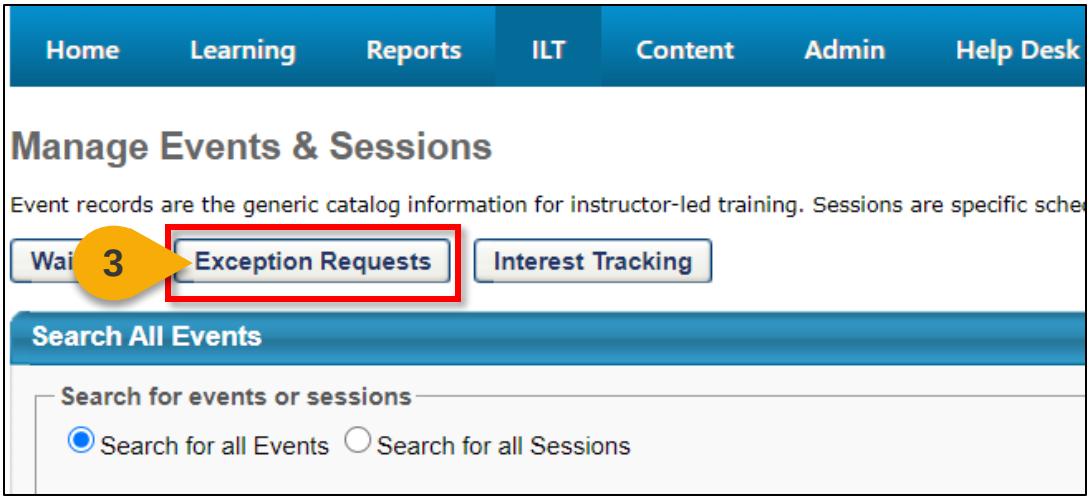


Approve or Deny Exception Requests

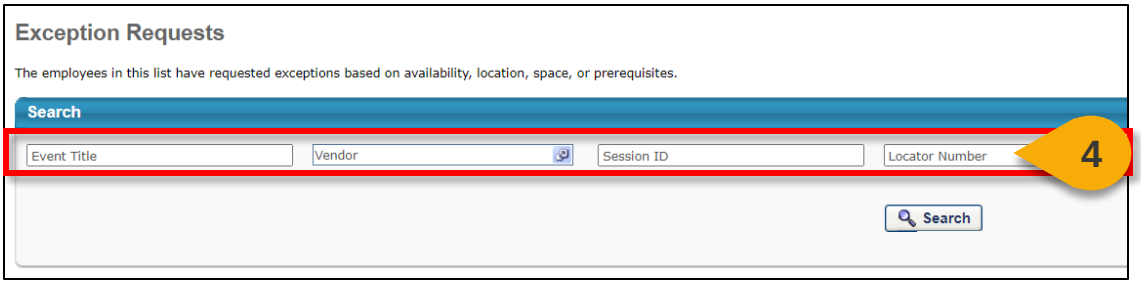
When you want to deny or grant an exception request…

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

Step 3: Click on **Exception Requests** to view all pending Exception Requests.

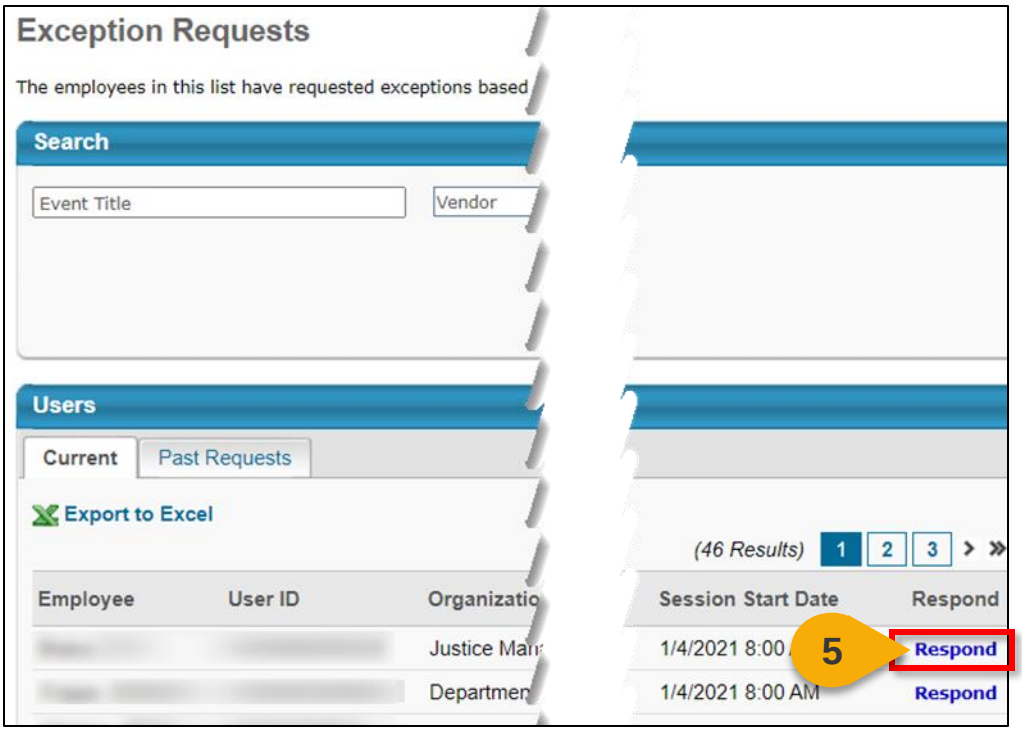


Step 4: You will be taken to the Exception Requests page. Search for the Event you would like to process requests for by entering the **Event Name, Vendor, Session ID, or Locator Number** in the search fields.

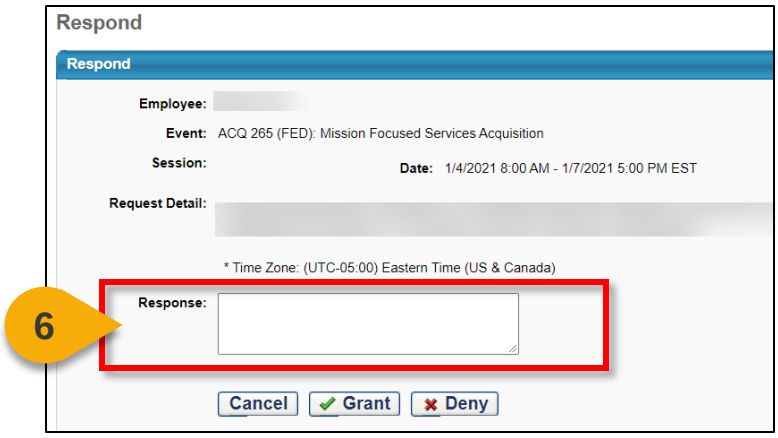


Approve or Deny Exception Requests (Cont.1)

Step 5: The Users with pending requests will populate in the bottom section of the screen. Click Respond to deny or grant a User's Exception Request.

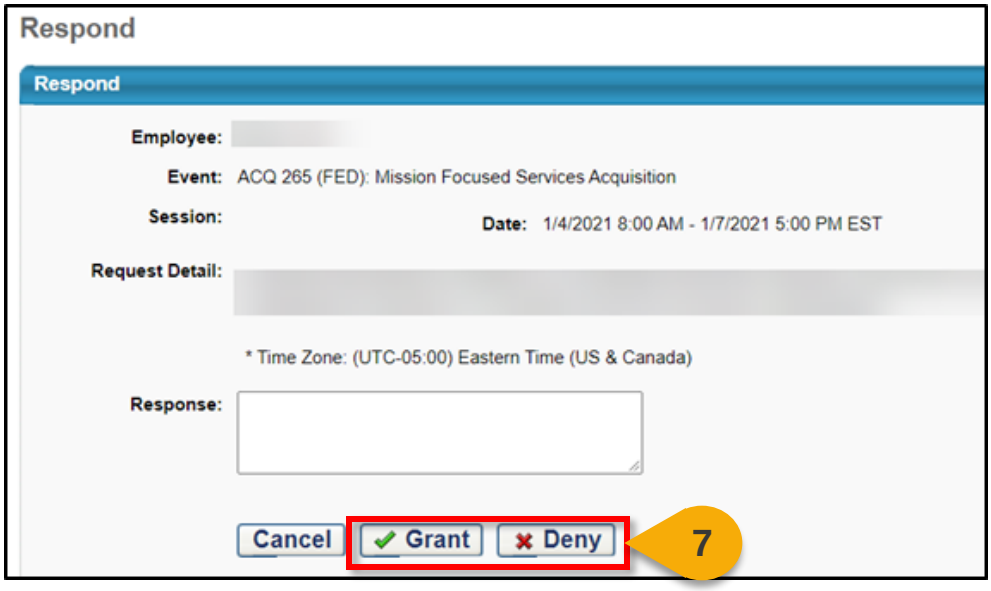


Step 6: Enter a comment in the Response text field that gives an explanation to the Exception Request.



Approve or Deny Exception Requests (Cont.2)

Step 7: Click **Grant or Deny** to respond to the Exception Request. You will be taken back to the Exception Request page after making your selection.



Individual Development Plans

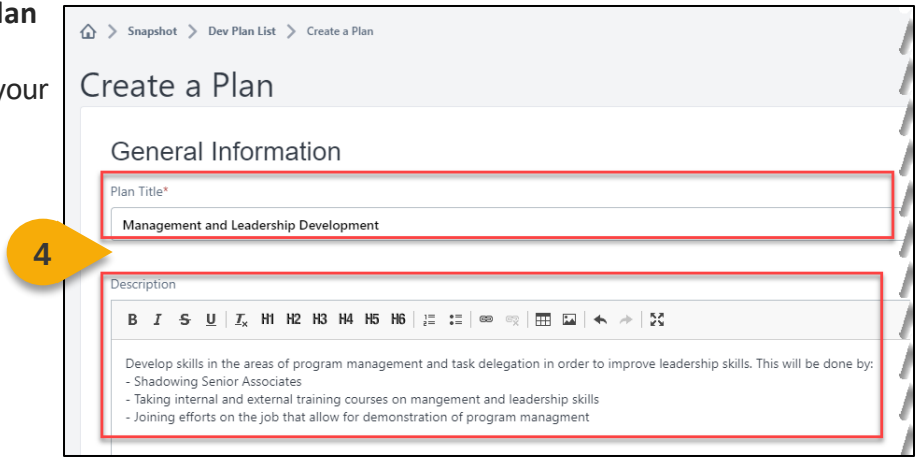
Create an IDP

When you want to create an IDP…

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

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

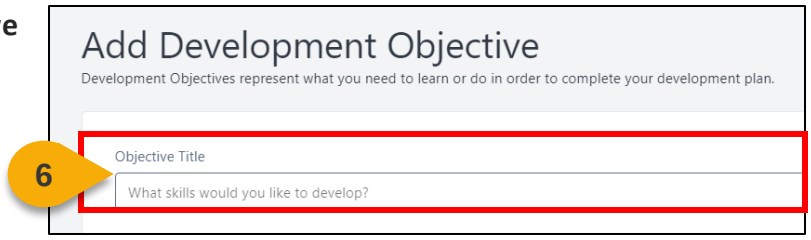
Step 4: Add a **Plan Title** and **Description** to your IDP.



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

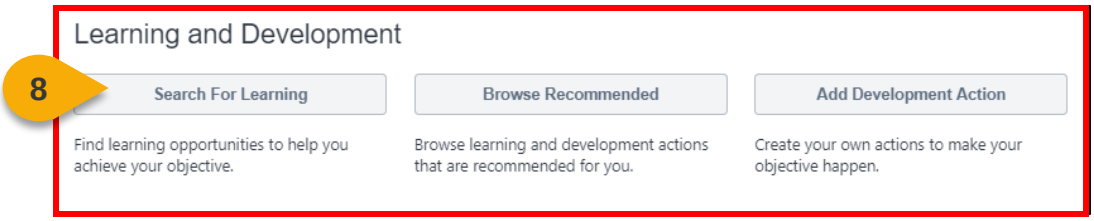
Create an IDP (Cont. 1)

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



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

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



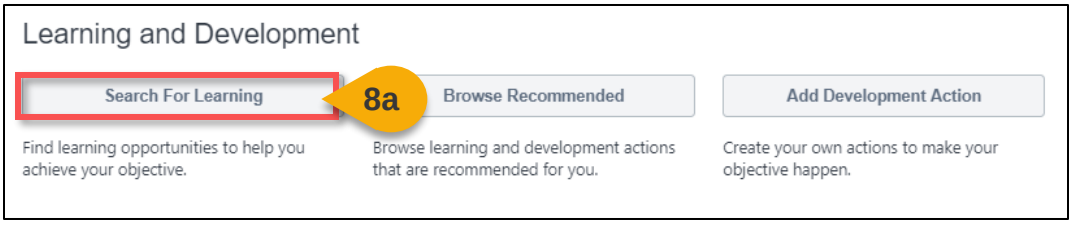
Search for Learning: Encompasses training sessions provided. It allows you to select online sessions.

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

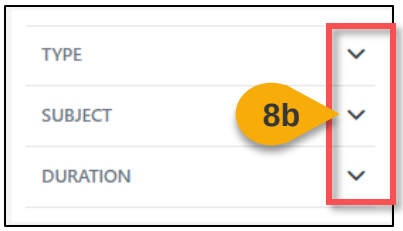
Add Development Action: Free text that allows you to add any external training or action item you wish to include in order to develop yourself professionally.

Create an IDP (Cont. 2)

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

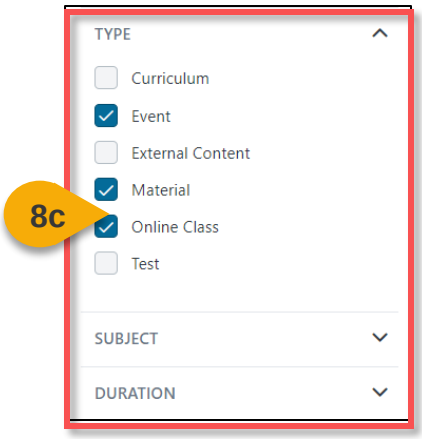


Step 8b: All the available courses will be displayed on the screen. To filter the results displayed, click on the **arrows next to the filter options** to the left of the page.



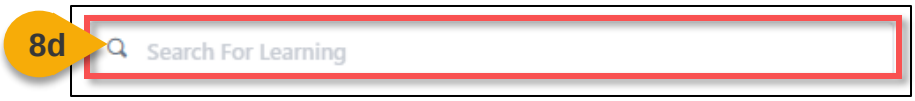
Step 8c: The filter options will expand on the screen. Select the filter you wish to apply by clicking on the **checkboxes** next to each option.

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



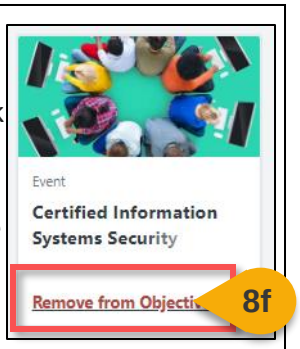
Create an IDP (Cont. 3)

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

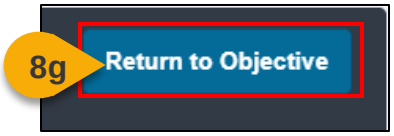


Step 8e: Select the **Add to Objective** link beneath any training you want to add. Multiple training courses can be selected.

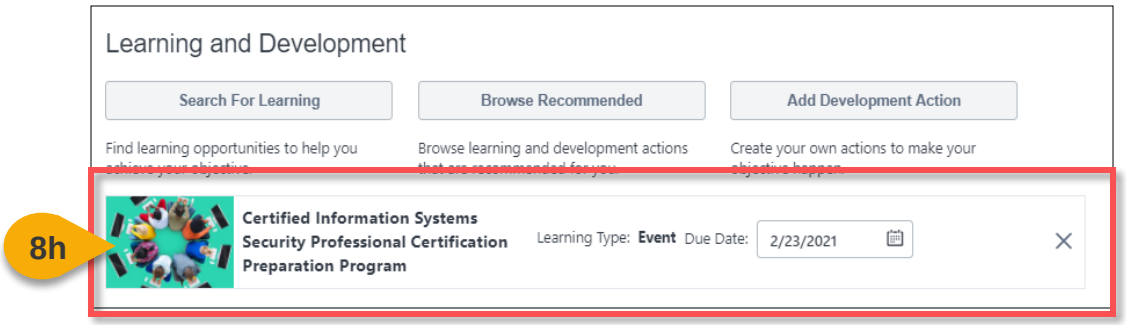
Step 8f: If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.



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

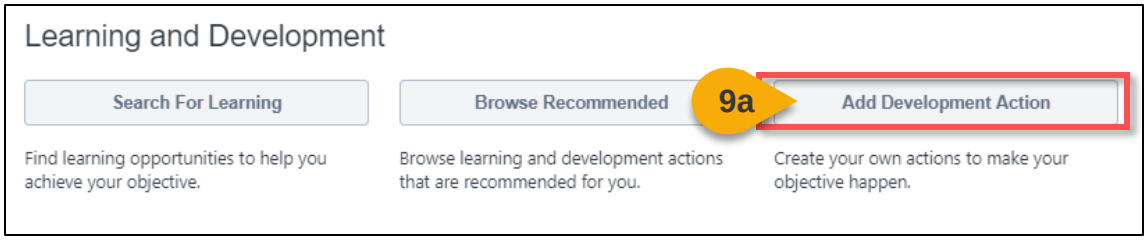


Step 8h: The course(s) selected will appear on the main **Objective** screen. By default, the training due date is set up to be due 6 months from now, but this date is editable. Notice that the training can be removed from your Objective by clicking on the **X icon** next to it.



Create an IDP (Cont. 4)

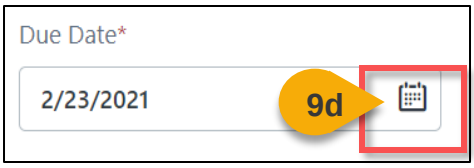
Step 9a: To add action items not in the CSOD catalog to your IDP Objective, click on **Add Development Action**.



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

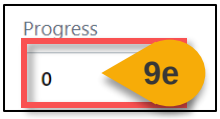
Step 9c: Select the **activity type** from the Activity Type dropdown menu.

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

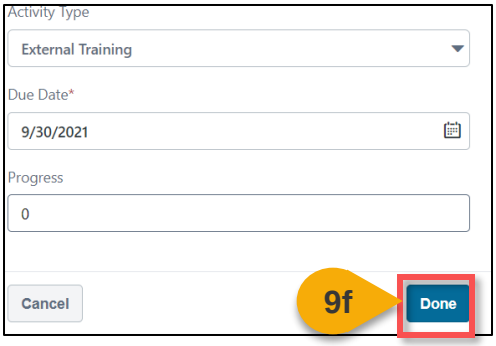


Create an IDP (Cont. 5)

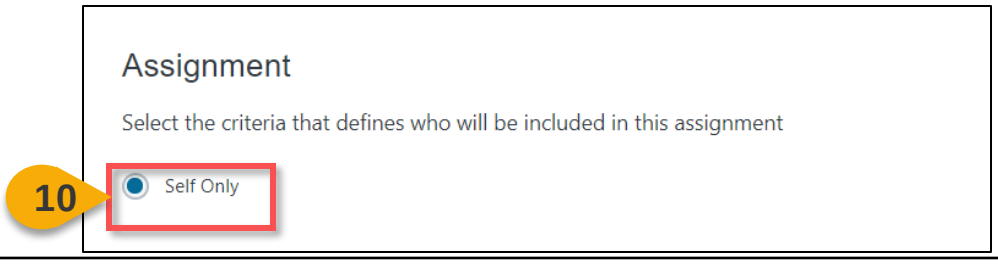
Step 9e: Update the **Progress** you have made as applicable. This is a percentage, but you don't need to type "%", just the number, e.g., for 25%, type in "25".



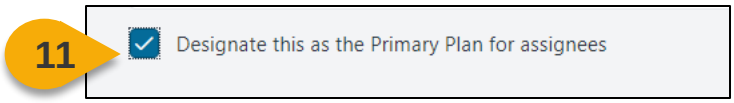
Step 9f: Click **Done** to add the activity to your IDP.



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



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



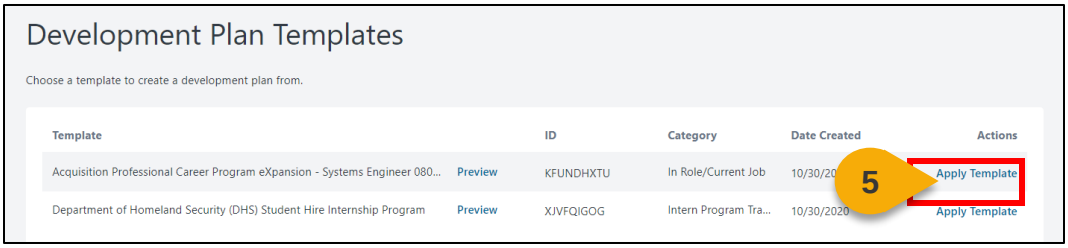
Create an IDP from a Template

When you want to create an IDP using a template…

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

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

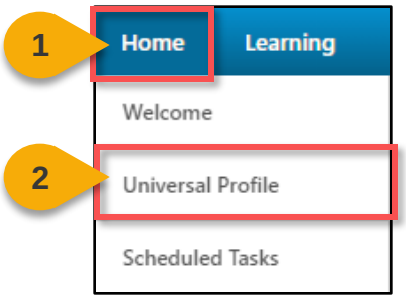
Step 5: Select the template you want to use and click **Apply Template.** You can edit the template or submit it for approval as-is.



Update IDP

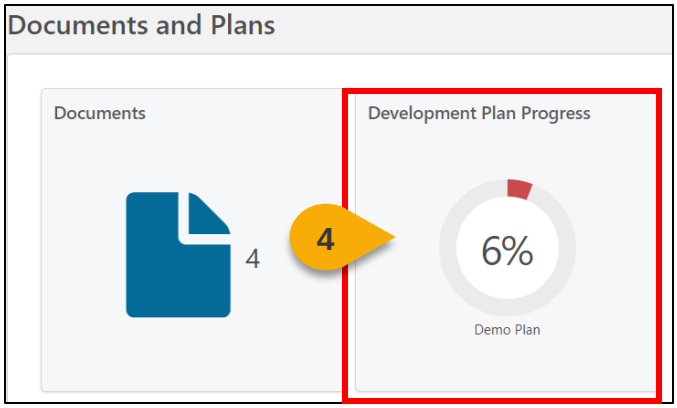
When you want to update an IDP Objective, Training or Action Step…

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



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

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

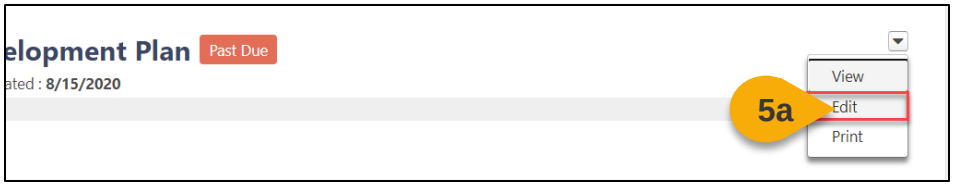


Note: You can also navigate to the IDP using the Performance tab and then clicking on Development Plans.

Update IDP (Cont. 1)

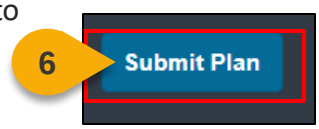
If you wish to add a new Objective to your IDP, follow steps 5a – 5b below.

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



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

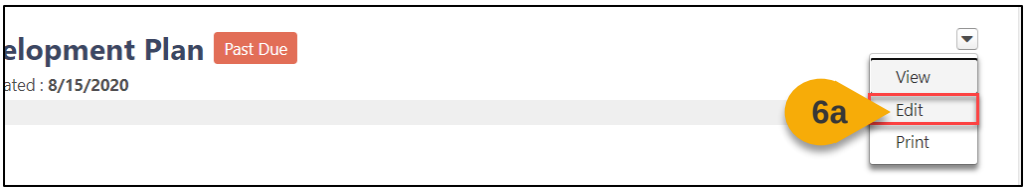
Step 6: Click on the **Submit Plan** button when you are ready to resubmit your plan for approval.



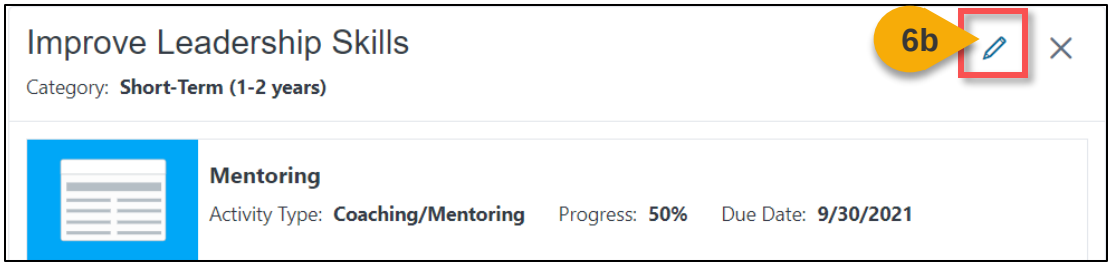
Update IDP (Cont. 2)

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

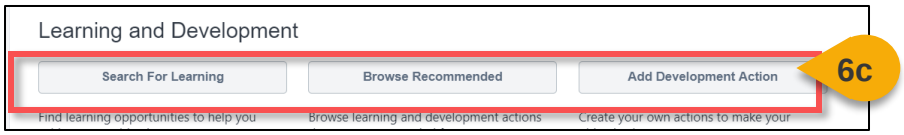
Step 6a: Select the dropdown icon **Edit** option next to the plan with the Objective you want to update.



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

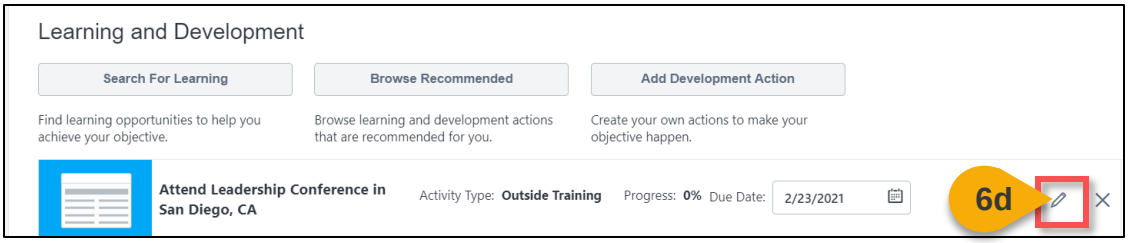


Step 6c: To add training or Development Actions, choose from the options within **Learning and Development.**

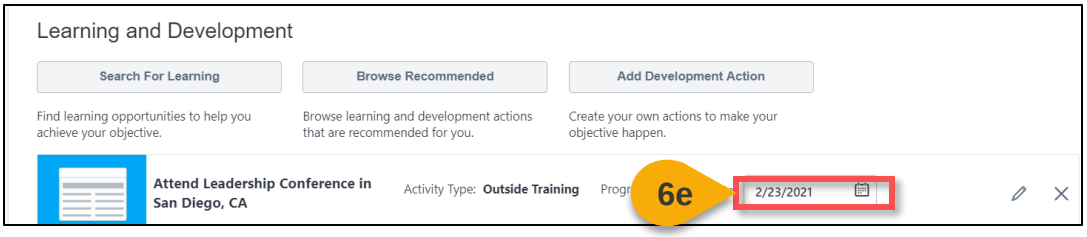


Update IDP (Cont. 3)

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

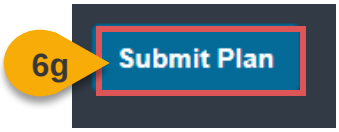


Step 6e: For training courses that are NOT Development Actions, you may update the due date by clicking on the **Due Date field** or delete it by clicking on the **X icon** next to it. Training course completions will be updated automatically as you complete these training courses on your transcript.



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

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

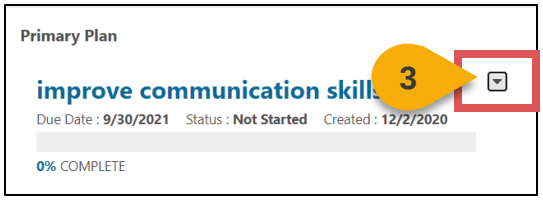


Cancel IDP

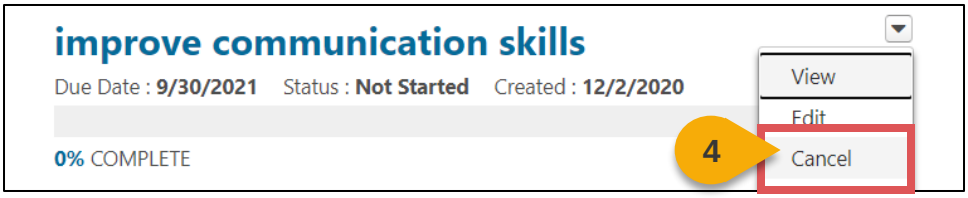
When you want to cancel an IDP…

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

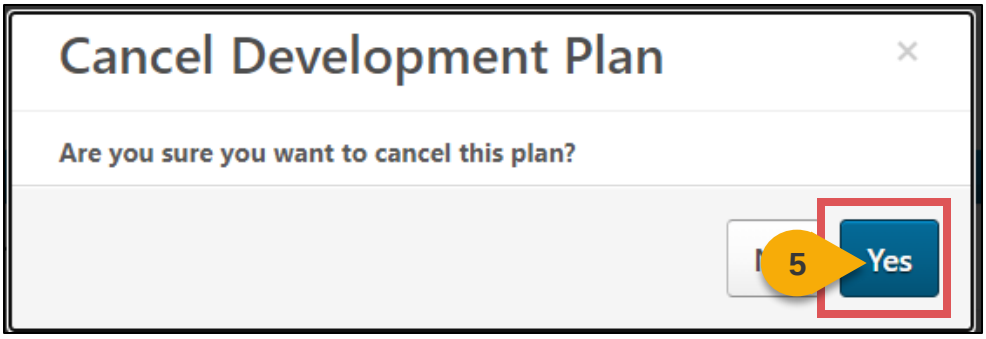
Step 3: Click the **dropdown arrow** next to the plan you would like to cancel.



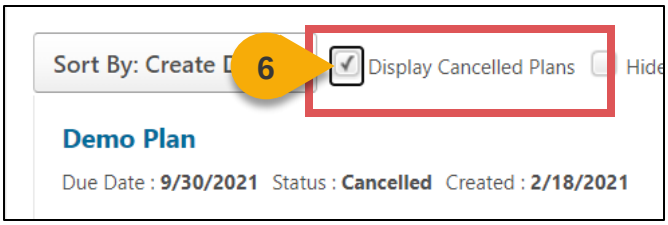
Step 4: Select **Cancel** from the dropdown menu.



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



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

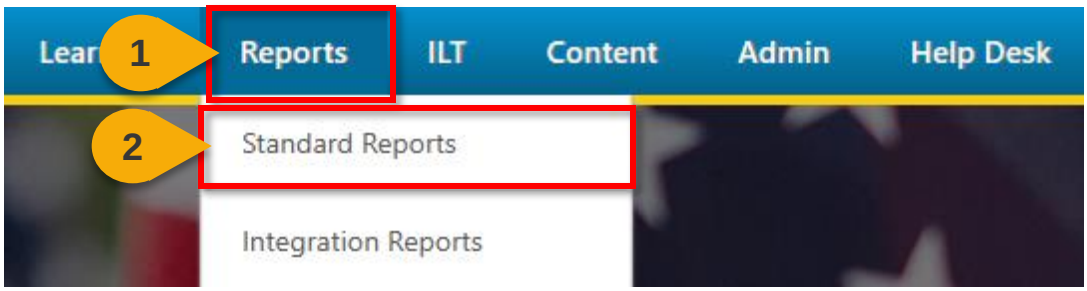


Reports

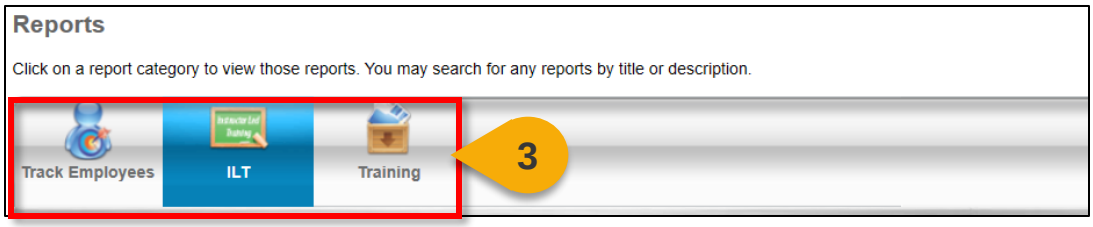
View Standard Reports

When you want to view Standard Reports…

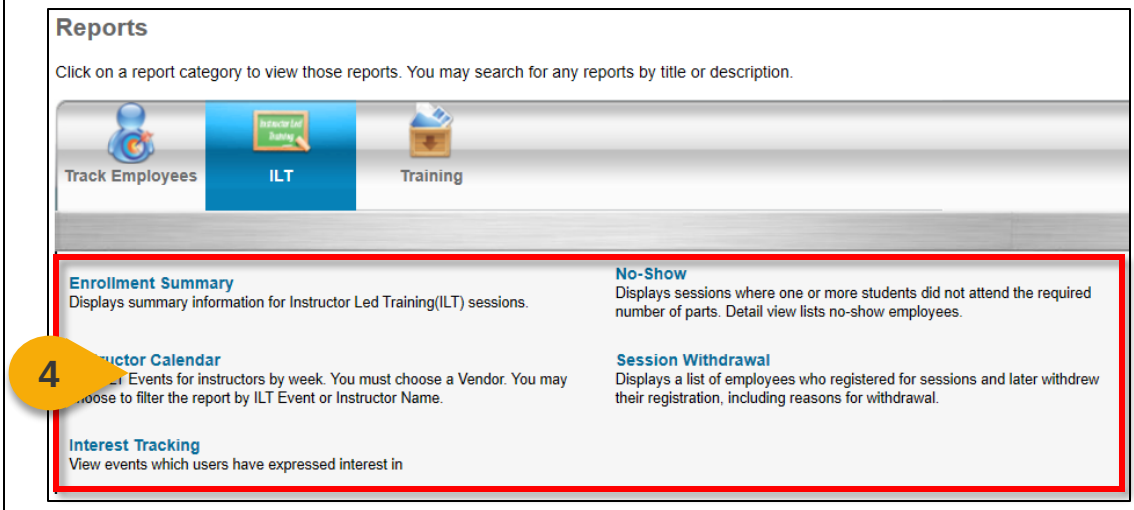
Steps 1 & 2: Hover over the Reports tab and then click Standard Reports.



Step 3: Choose the Report Category.

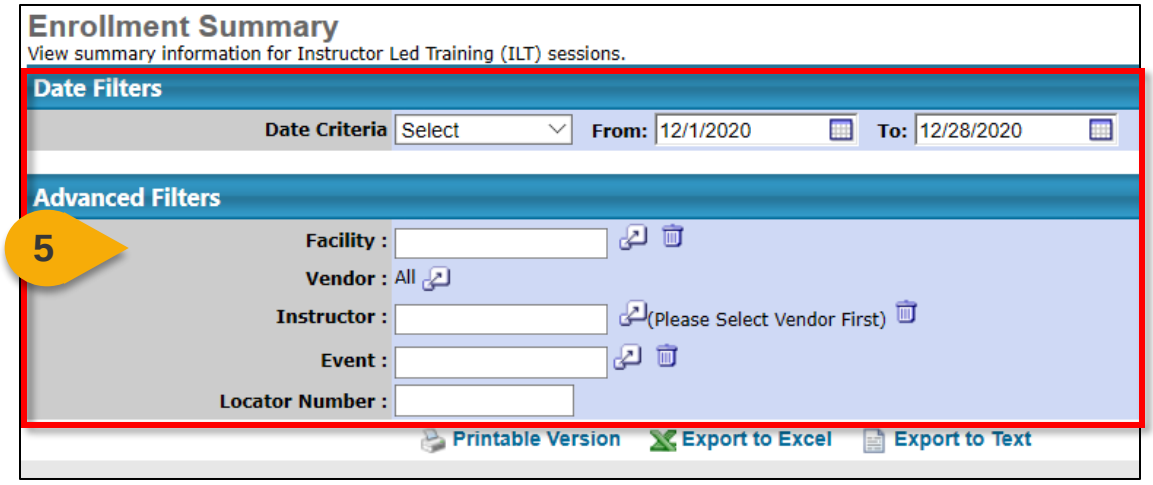


Step 4: Select the type of report you would like to view by clicking on the **name of the report**.

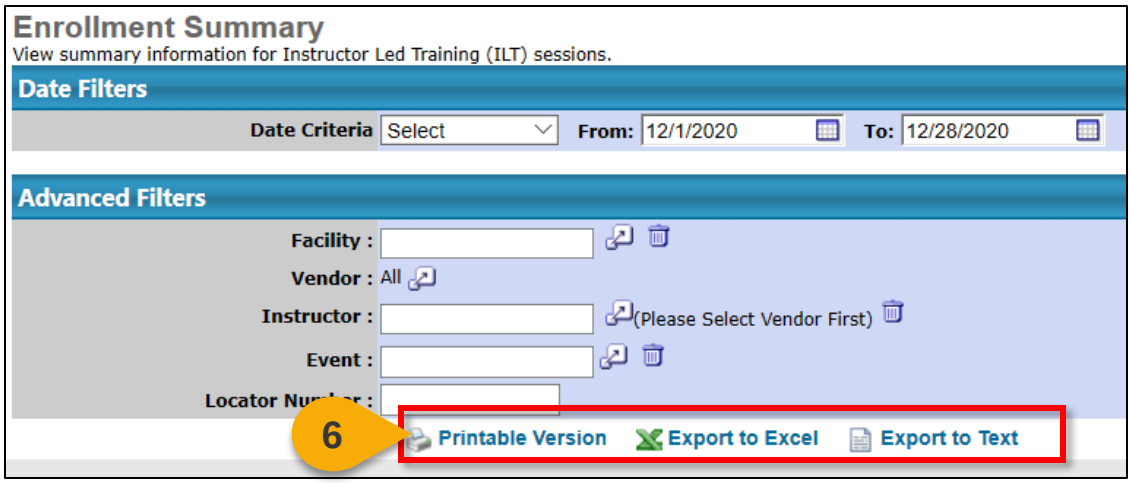


View Standard Reports (Cont.1)

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



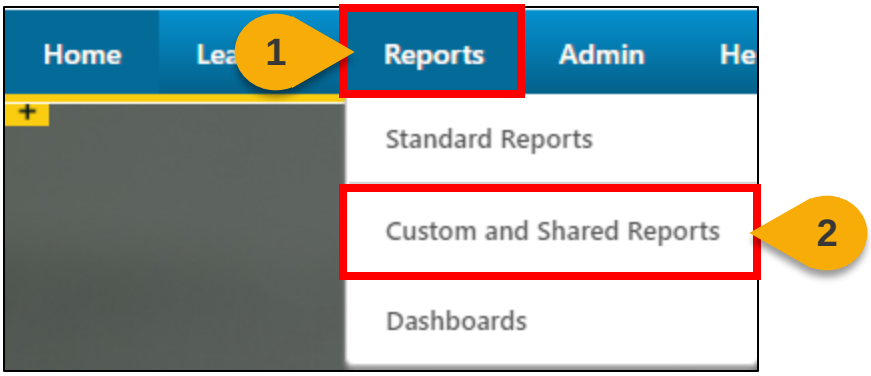
Step 6: Choose how you would like the report to export: Printable Version, Export to Excel, or (when available), Export to Text. The file will download to your computer.



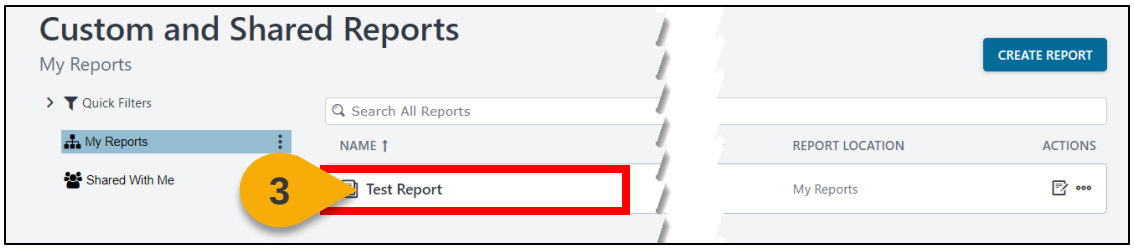
View Custom Reports

When you want view custom or shared reports…

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

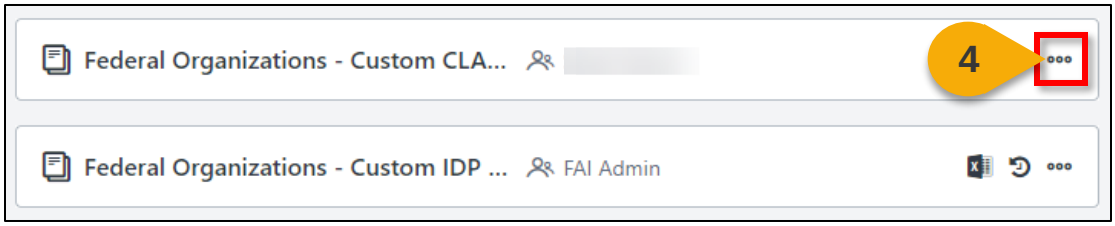


Step 3: You will arrive at the Custom and Shared Reports page. Here you will see all custom reports that you have created. Click on the **title** of the report to view it.

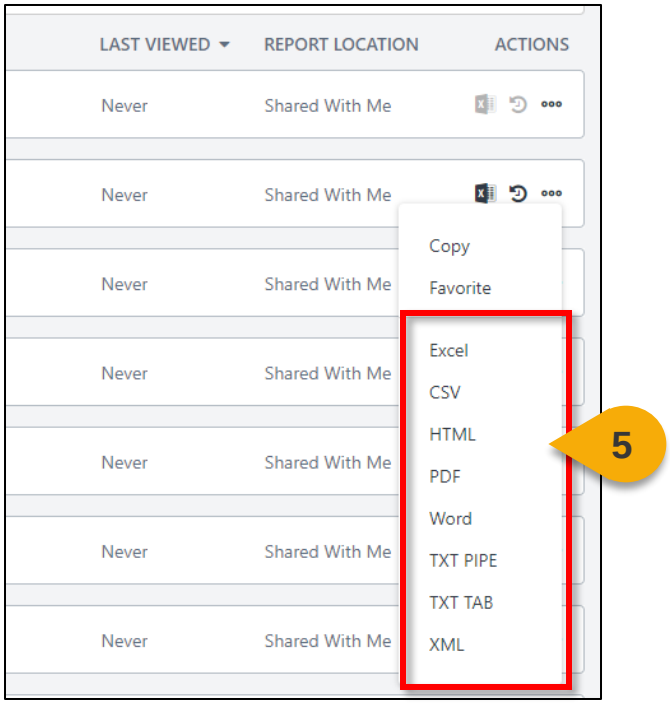


View Custom Reports (Cont.1)

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



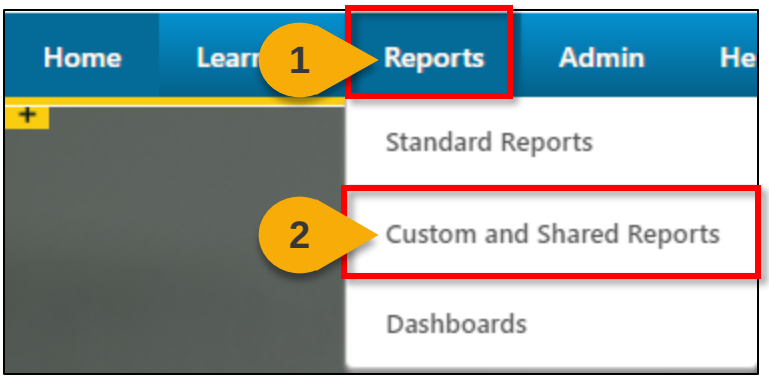
Step 5: Click the **file format** you wish to download. It will download to your computer.



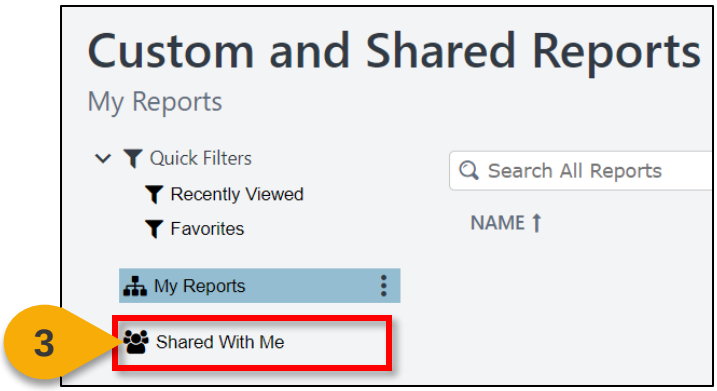
Filter and Download Custom Reports

When you want to filter and download a report…

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



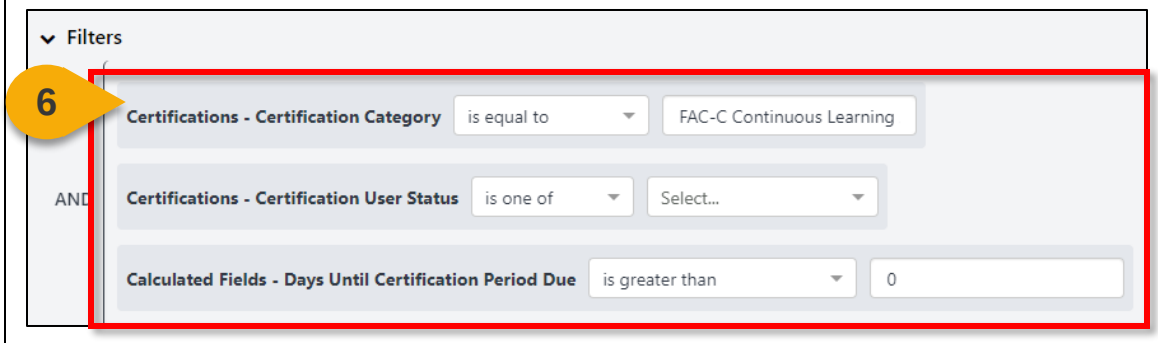
Step 3: On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you.



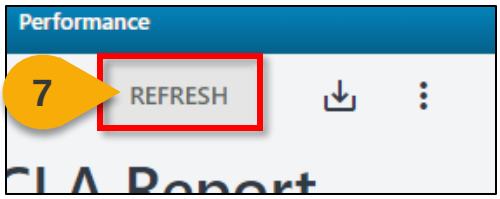
Step 4: Click the **Report Name** you want to view to update the report filters.

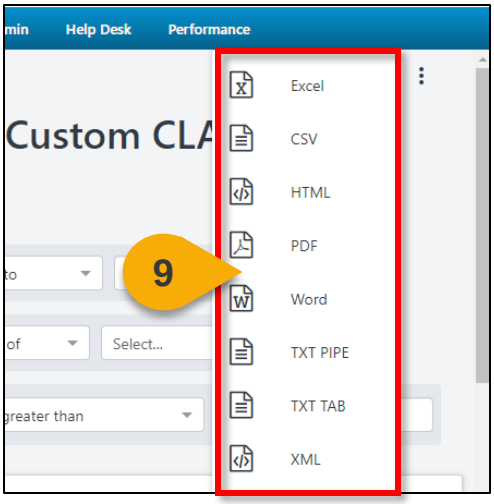
Filter and Download Custom Reports (Cont. 1)

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



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



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

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