FEDERAL ACQUISITION INSTITUTE

Warrant Approver Task Aid

Task Aid Titles

- Log on
- Forgot Password
- Request and Account Using a SAAR Form
- View User Record
- Edit User Record
- Edit User Record via Advanced Forms
- View Transcript
- View Transcript Status
- Use Global Search
- View User's Record
- View User's Transcript
- Request External Training Credit Within a Certification
- Request External Training Credit from Transcript
- Add External Training from Transcript to a Certification
- Register for Online Training
- Submit an Exception Request
- Register for Instructor-Led Training
- Indicate Interest in a Future Session
- Withdraw from an ILT
- Request and Manage a Certification
- Edit Warrant Information
- Approve/Deny/Return a Warrant
- Revoke a Warrant
- Put a Warrant on Hold
- Create an IDP
- Create an IDP from a Template
- Update IDP
- Cancel IDP
- View Standard Reports
- View Custom and Shared Reports
- Filter and Download Custom and Shared Reports

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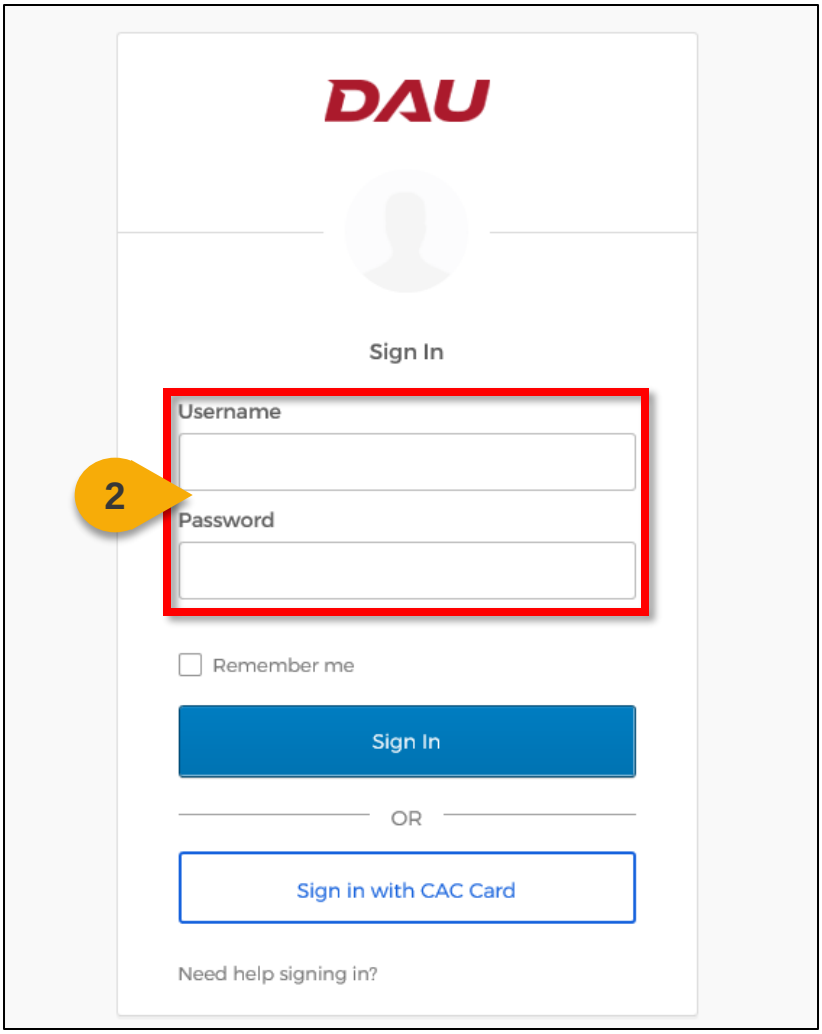
User Account Management

Log On

When you want to login…

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

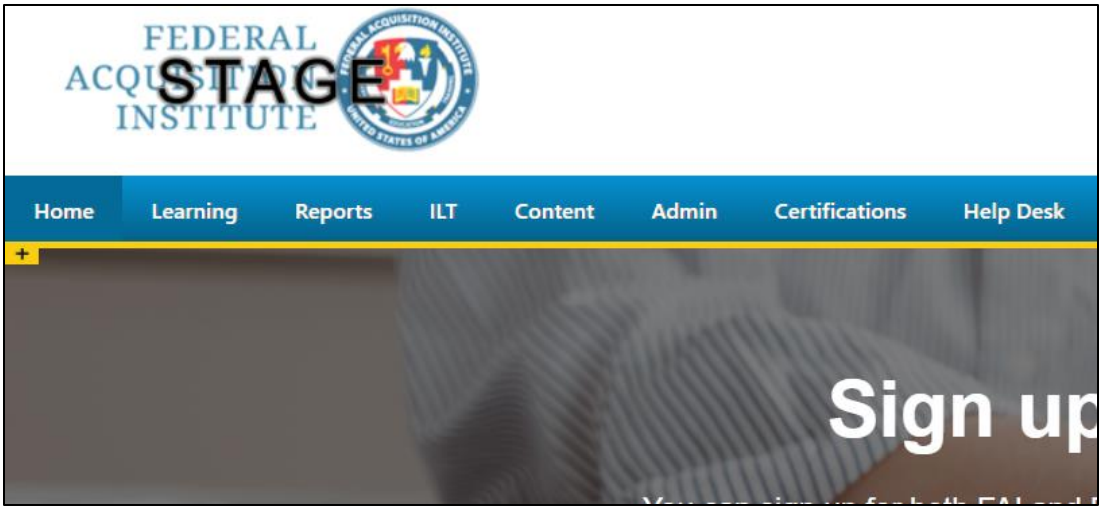
Step 2: The log on window will pop up. Enter your **Username** (your email) and **Password** in their respective fields.



Log On (Cont.1)

Step 3: Click **Sign In.**

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



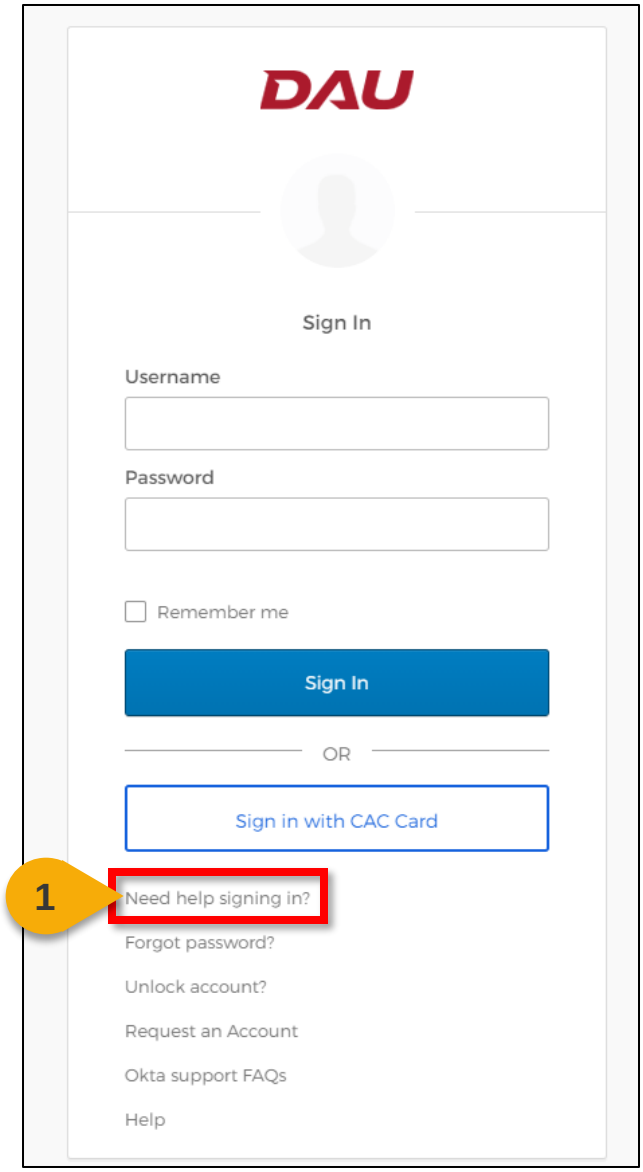
NOTE: If you receive an error message:

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

Forgot Password

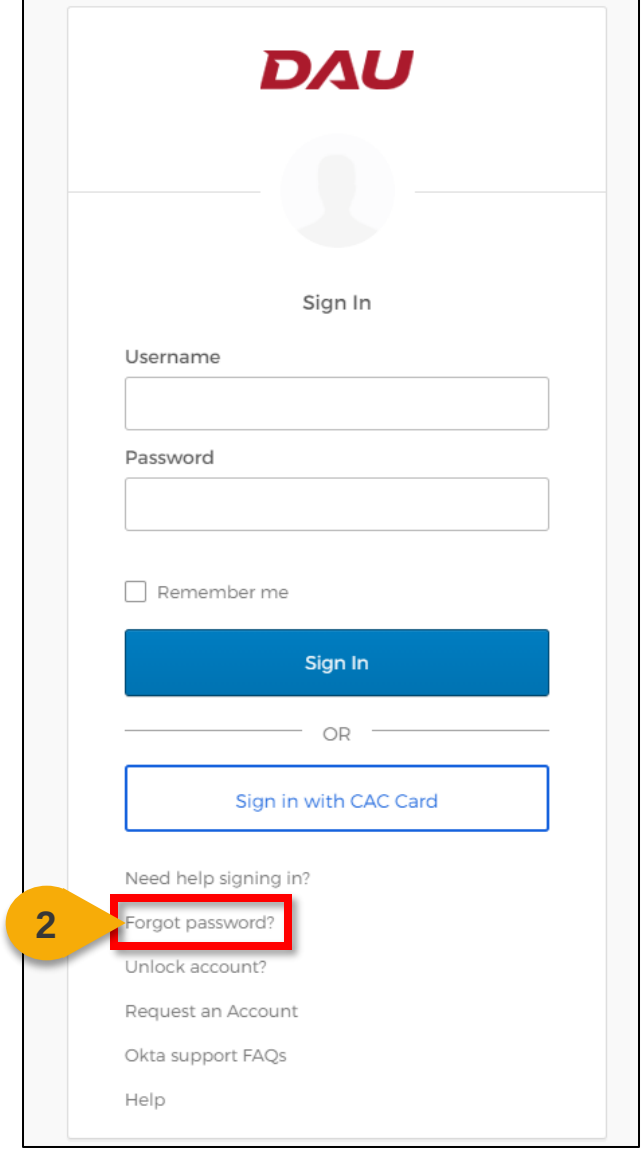
When you can't log on…

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



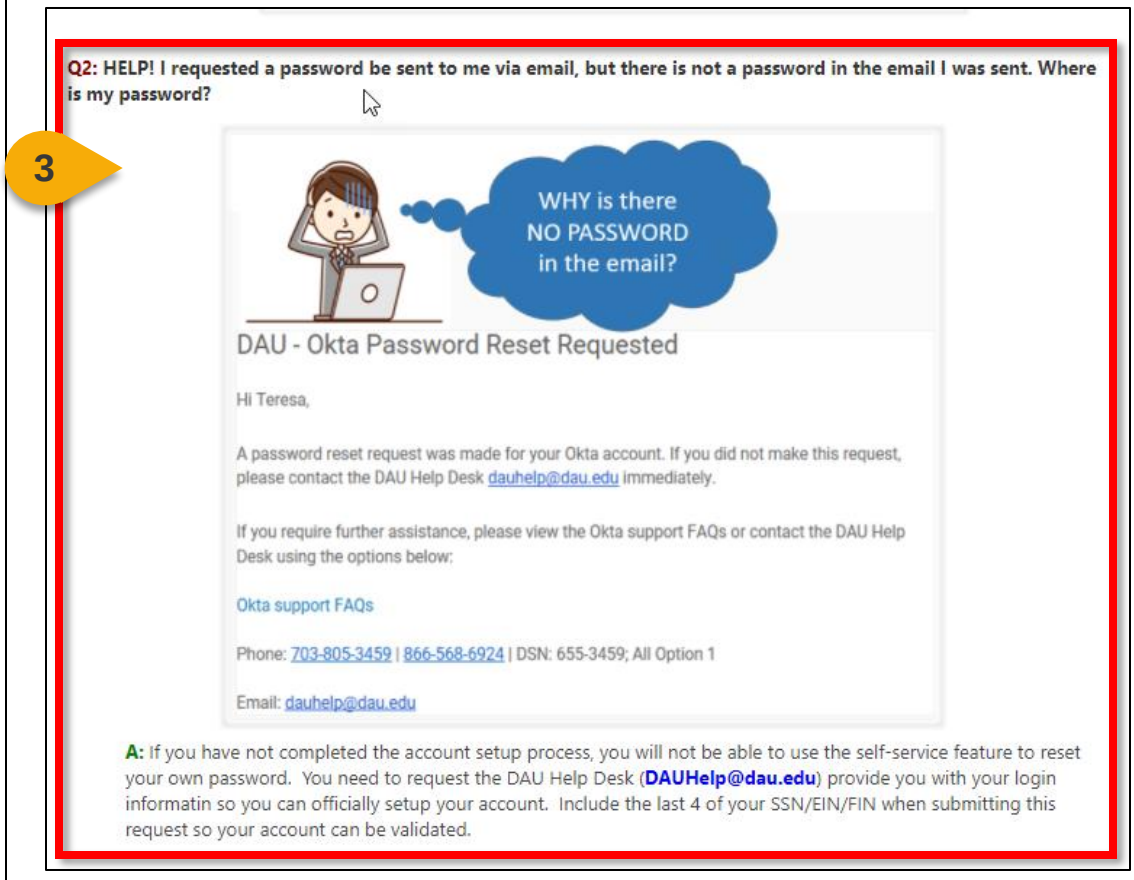
Forgot Password (Cont.1)

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

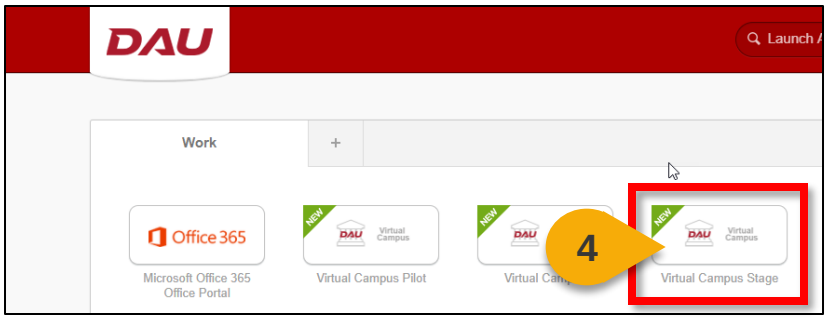


Forgot Password (Cont.2)

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

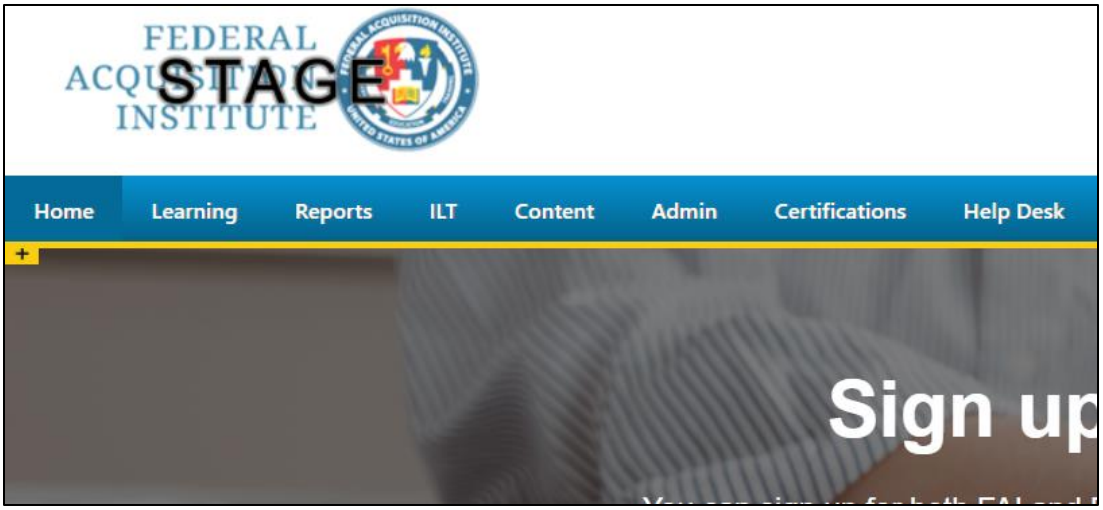


Step 4: Once you have the username and password entered, the list of systems you have access to will pop up. Select the **Virtual Campus Stage** button.



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.



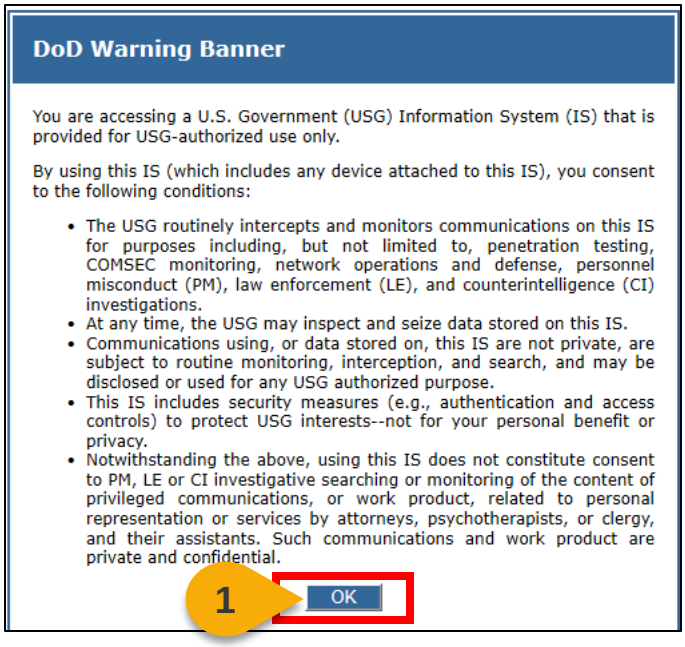
NOTE: If you receive an error message:

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

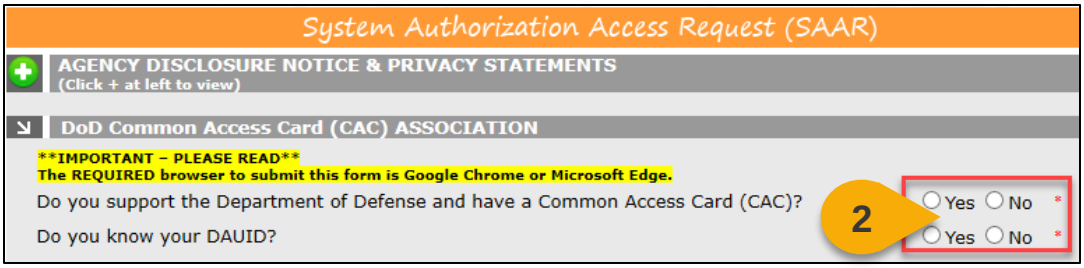
Request an Account Using the SAAR Form

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".**



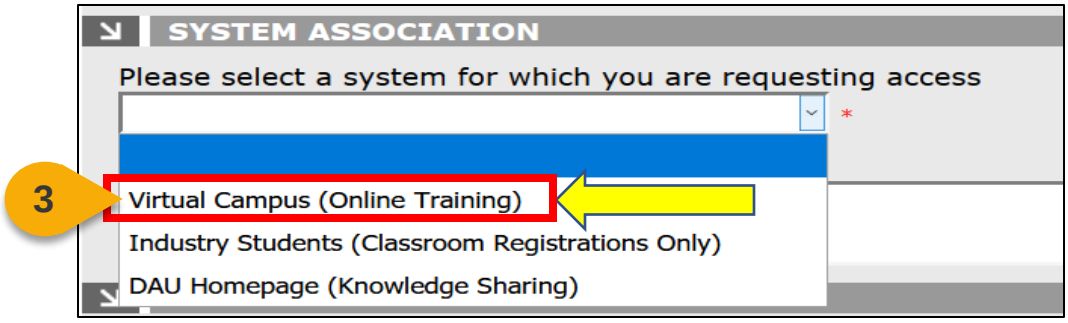
Step 2: Click the **radio buttons** to answer the questions regarding having a DoD CAC and/or DAUID.



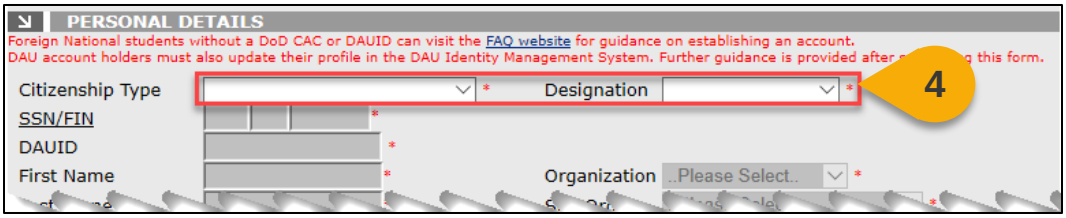
NOTE: If you support the Department of Defense and have a Common Access Card (CAC), the system can determine if there is already a DAUID associated to your information. If you select "Yes" and the system does find your account, the fields for your DAUID, Name, and Email address under PERSONAL DETAILS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

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

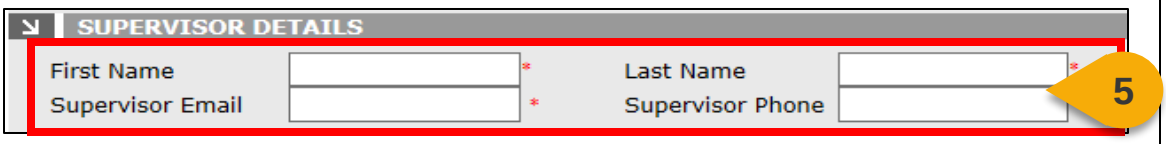
Step 3: Under SYSTEM ASSOCIATION you must select "**Virtual Campus (Online Training)**". If you choose one of the other options, this will significantly delay the process to have an account created to take a course.



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



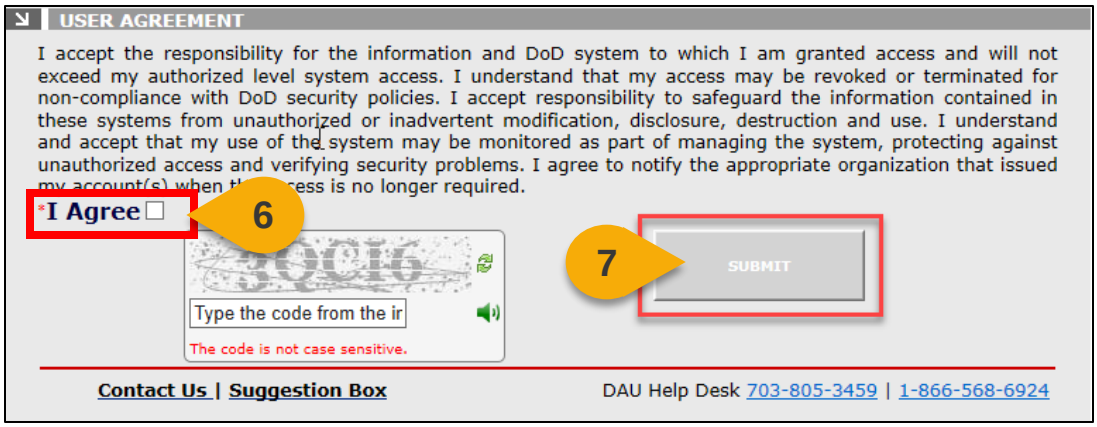
Step 5: Enter your **SUPERVISOR DETAILS**.



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.

.

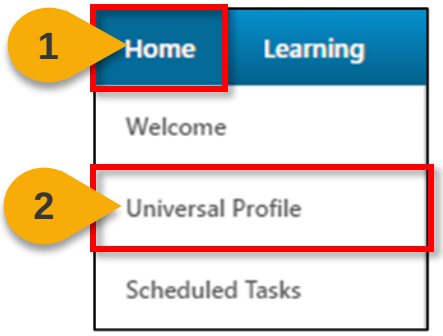


IMPORTANT: If there was any information that was not filled in correctly, there will be red text in the area of the form that requires your attention for correction. Afterwards, you will need to select the "**I Agree**" check box again and enter the new code in the image box for your SAAR to be submitted.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

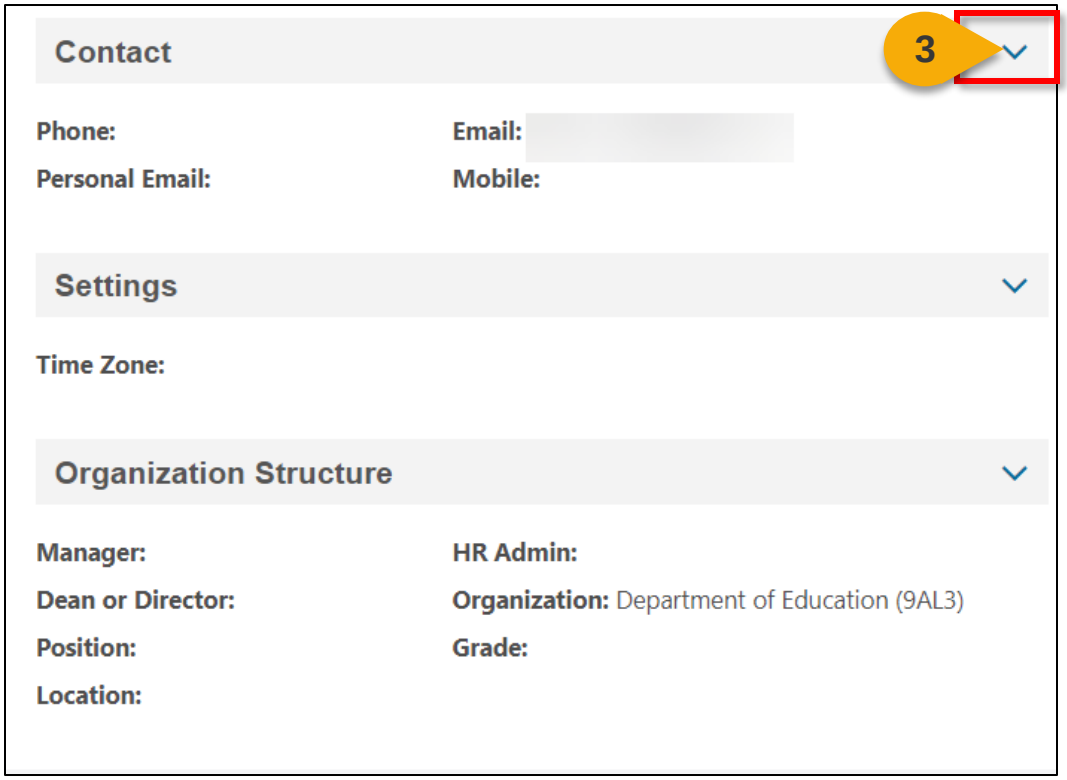
View User Record

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.



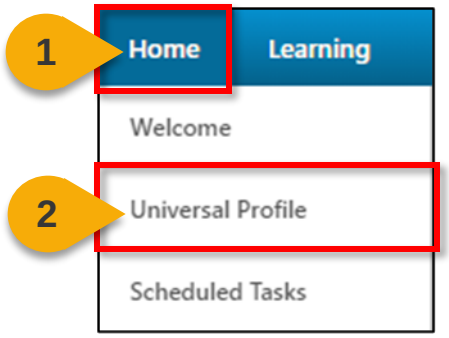
Step 3: To expand a section, click on the **arrow** to the right of that section.



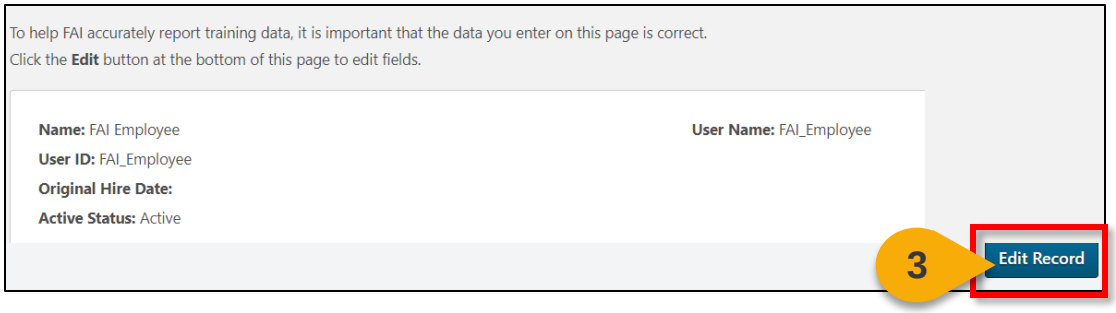
Edit User Record

When you want to edit information on the user record…

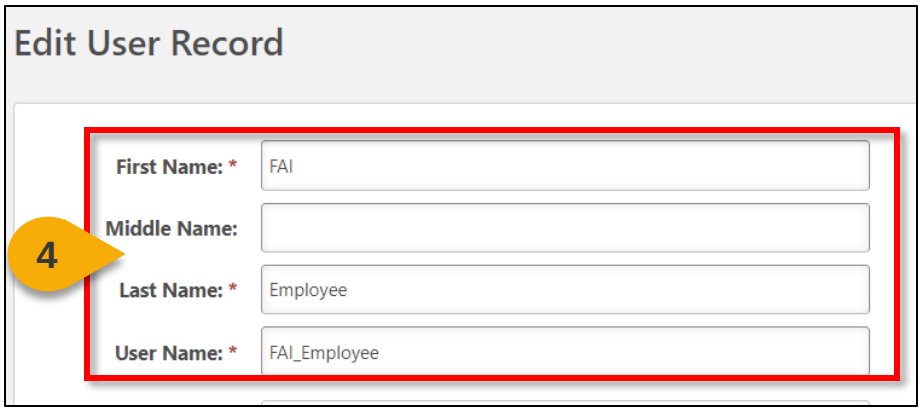
Steps 1 & 2: Hover over the **Home** tab, then select the **Universal Profile** tab. You will be taken to the User Record page.



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

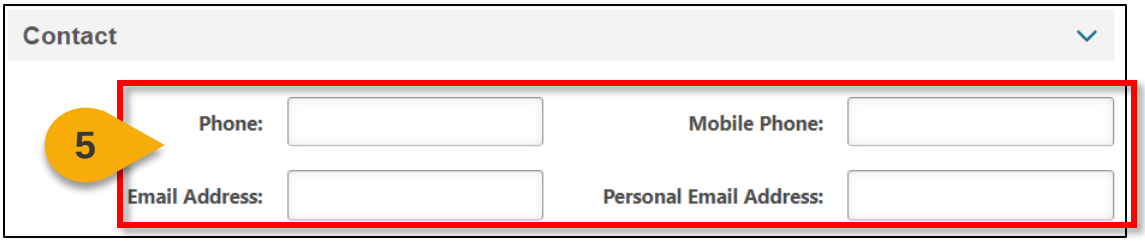


Step 4: In the first section at the top of the screen, you can edit your **First Name, Middle Name, Last Name, and User Name.**

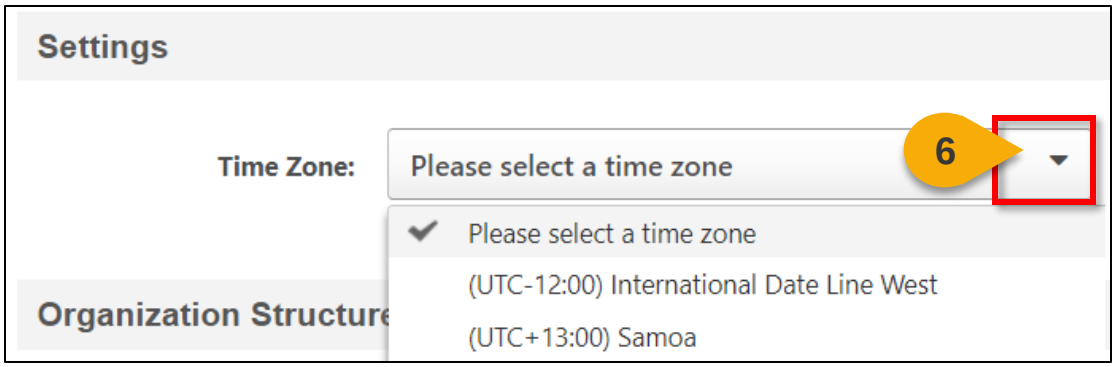


Edit User Record (Cont.1)

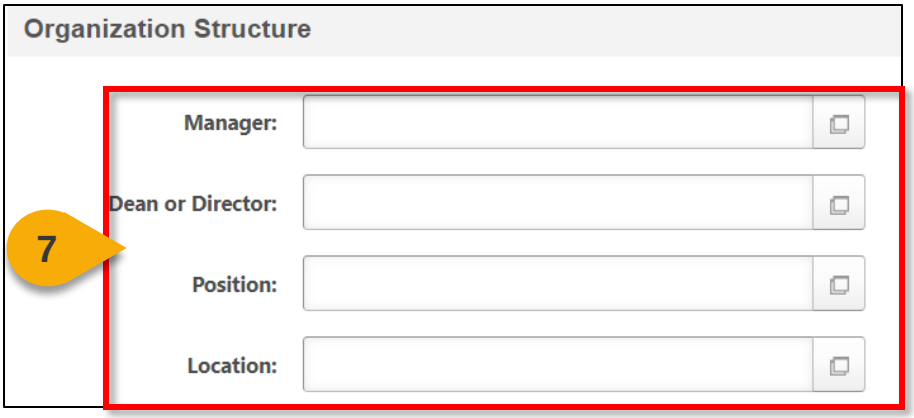
Step 5: In the Contact section, you can fill in your **Phone, Mobile Phone, Email Address, and Personal Email Address.**



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

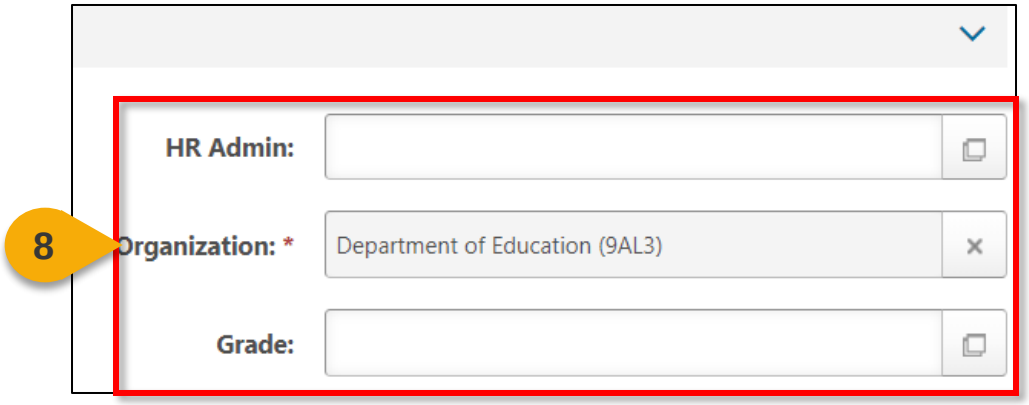


Step 7: In the Organization Structure section, you can input your **Manager, Dean or Director, Position, Location**.

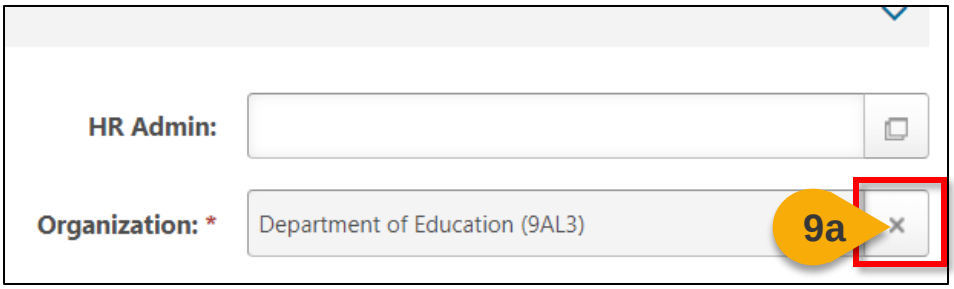


Edit User Record (Cont.2)

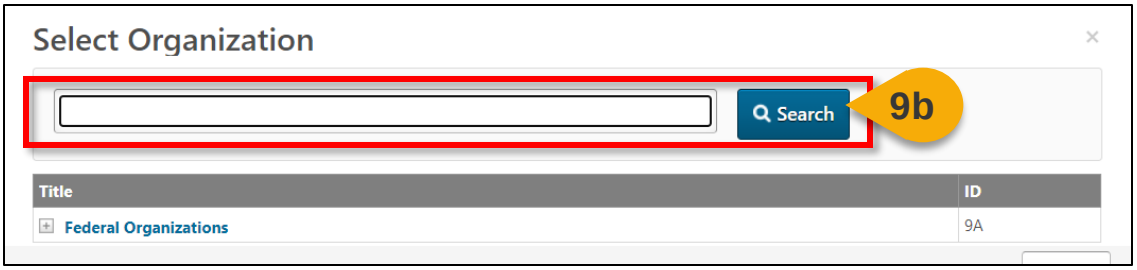
Step 8: In the Organization Structure, you can also edit the **HR Admin, Organization, and Grade.**



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

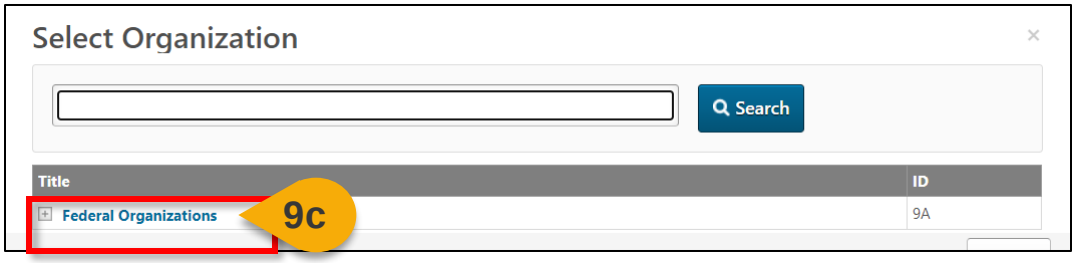


Step 9b: You can manually enter the name of your organization in the **search box.**

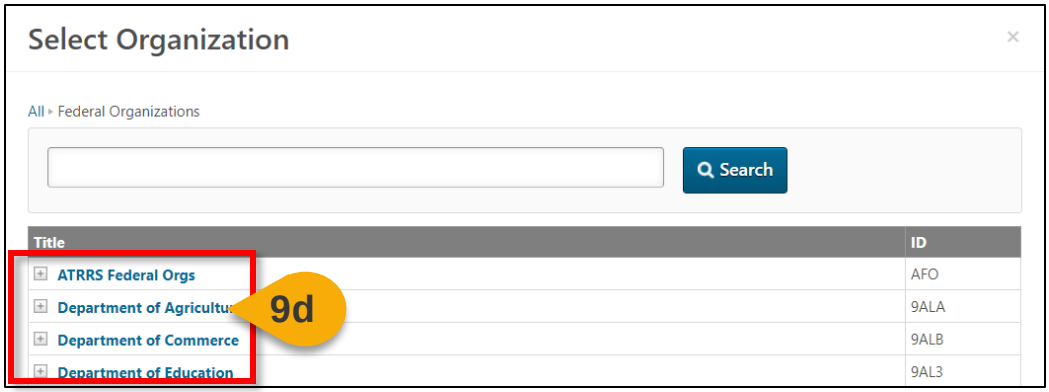


Edit User Record (Cont.3)

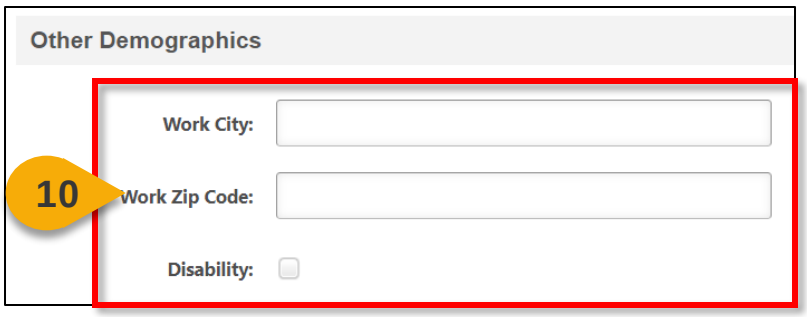
Step 9c: You can also click **Federal Organizations** to drill down to see more organizations and search manually.



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

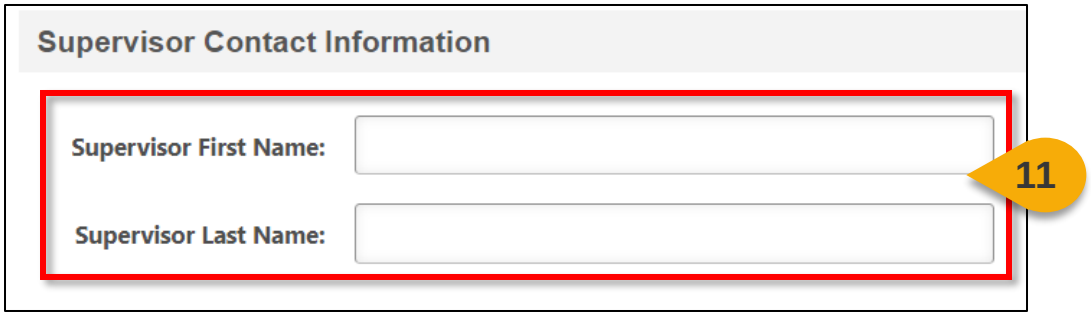


Step 10: In the Other Demographics section, you have the option to fill in additional information on your demographics such as **Work City, Zip Code, Disability, etc.**

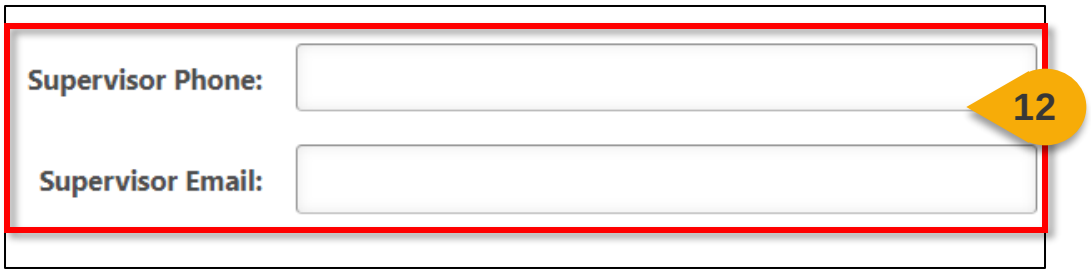


Edit User Record (Cont.4)

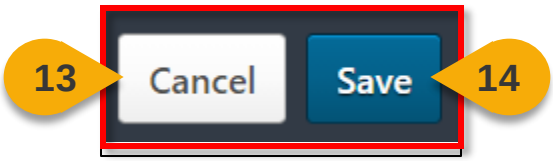
Step 11: In the Supervisor Contact Information section, you can fill in the **first and last name** of your supervisor.



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



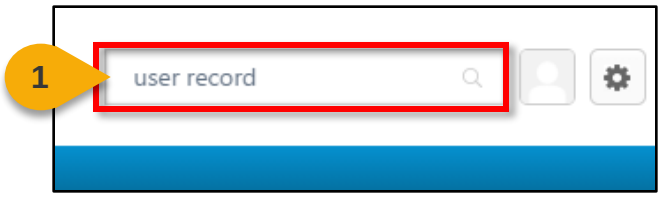
Steps 13 & 14: Click **Save** to keep all the changes or click **Cancel** to discard the changes.



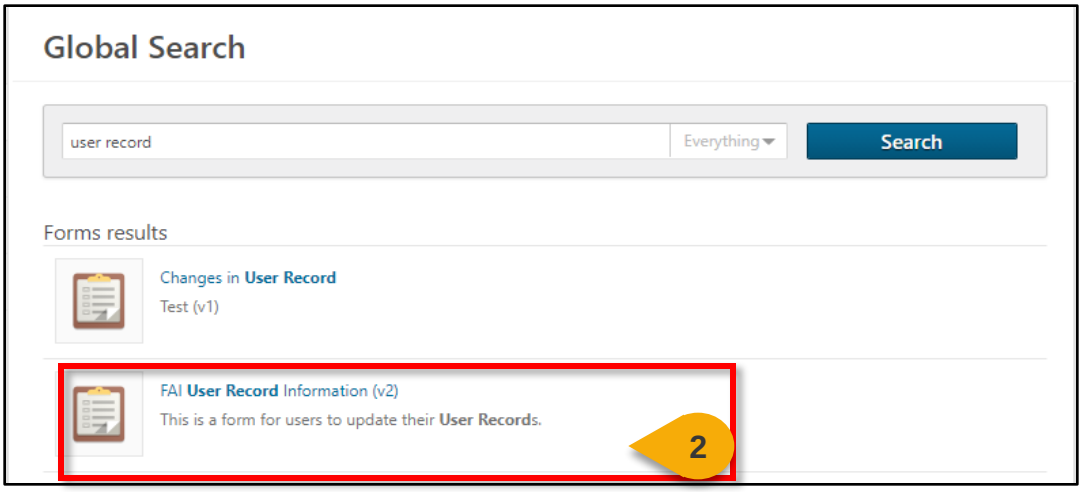
Edit User Record via Advanced Forms

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.

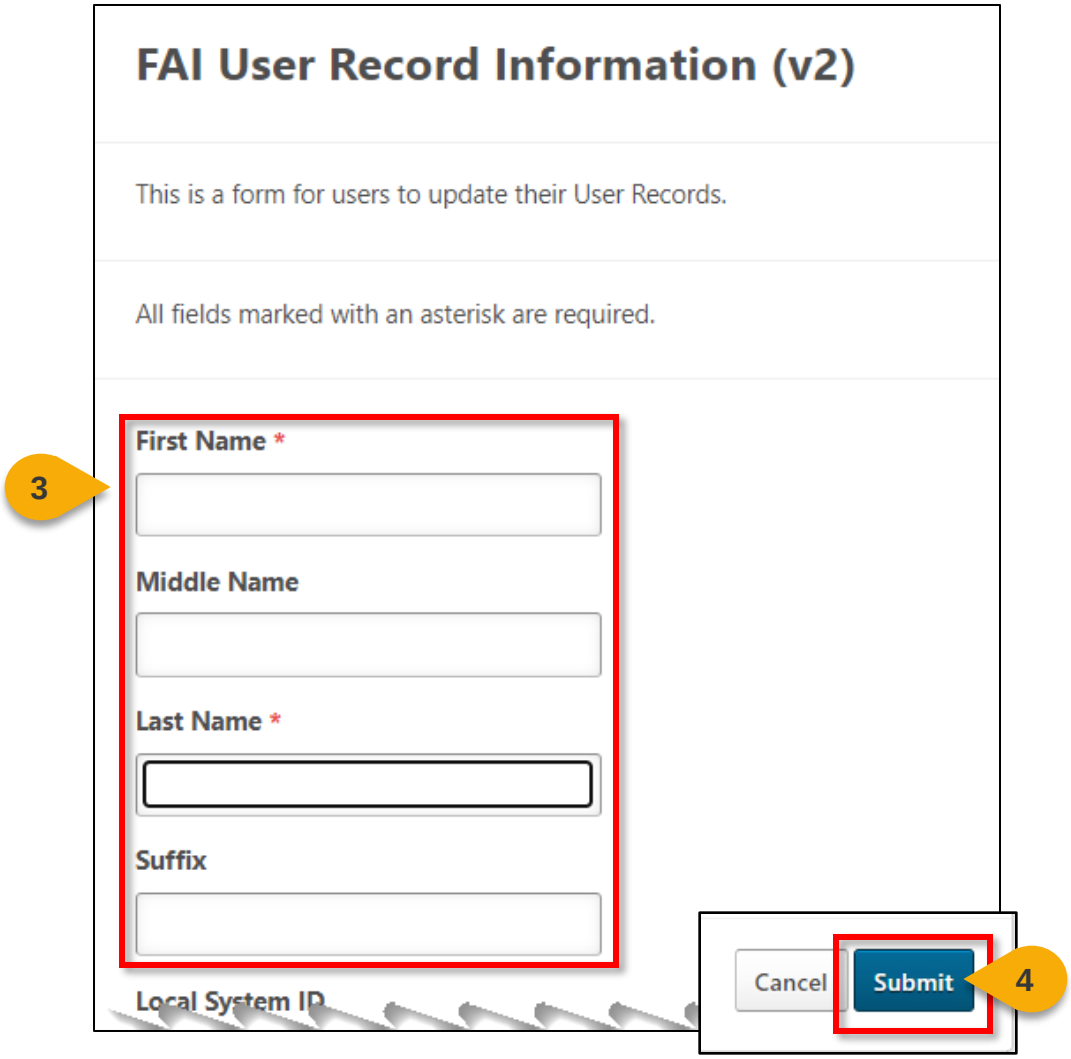


Step 2: Select the **FAI User Record Information** form.



Edit User Record via Advanced Forms (Cont.1)

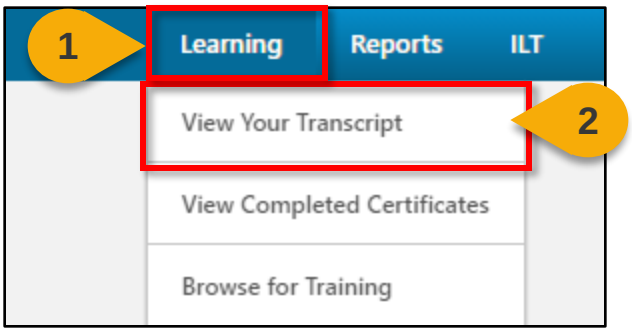
Steps 3 & 4: Fill in the form and click **Submit** at the bottom of the page when finished. Fields with a * are required. You will see the changes reflected on your User Record immediately.



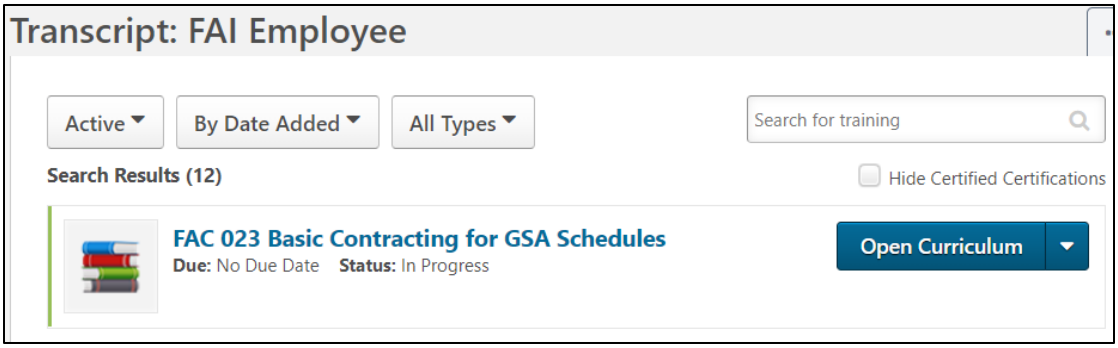
View Transcript

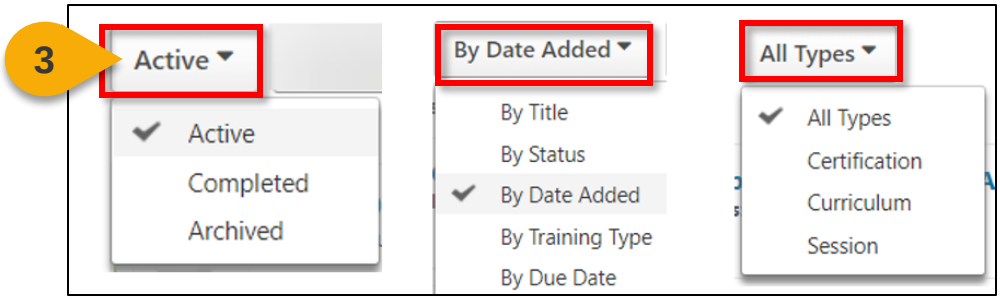
When you want to view your Transcript…

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.

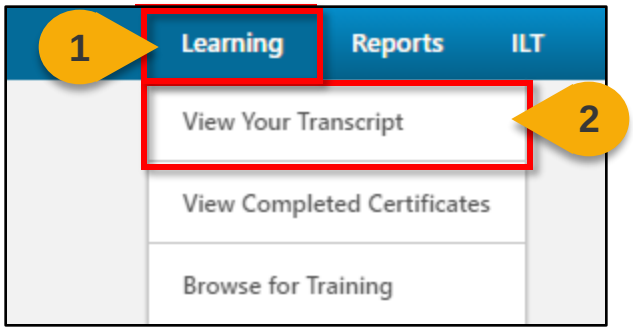




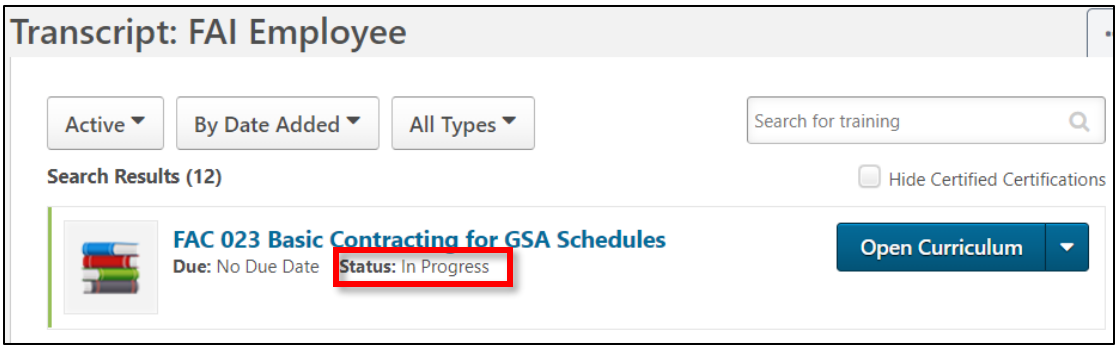
View Transcript Status

When you want to view your Transcript status…

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



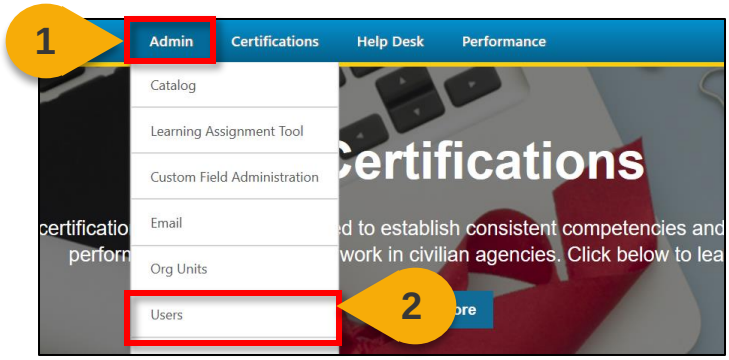
Your Transcript will display in the screen. The **status** of your courses will be listed underneath the title of the course.



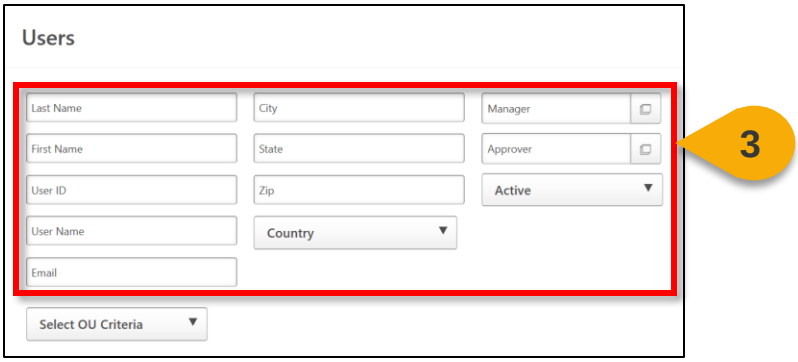
Search for a User

When you want to look up a User…

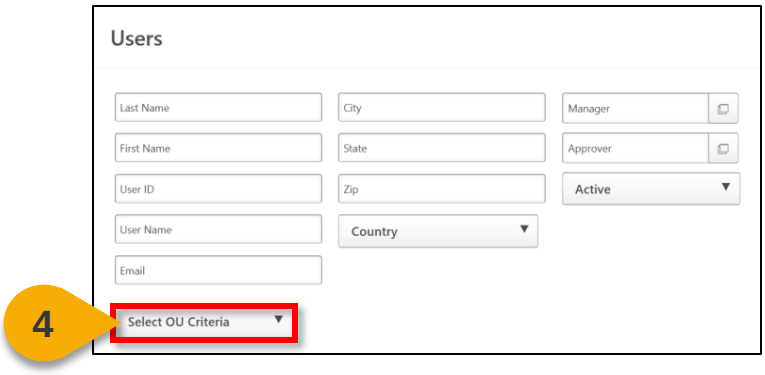
Steps 1 & 2: Hover over the **Admin** tab and then select **Users**.



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



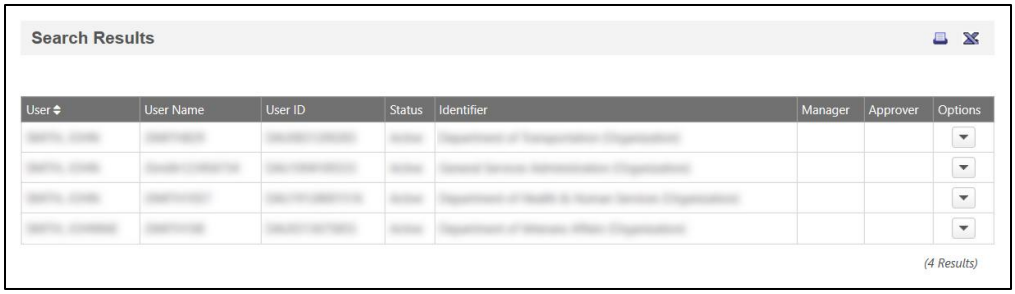
Step 4: Click on **Select OU Criteria** to further filter your search if desired.



Search for a User (Cont.1)

Step 5: Hit enter or click Search.

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

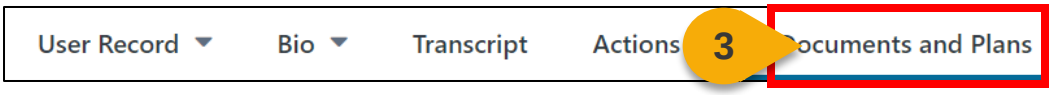


View User's Record

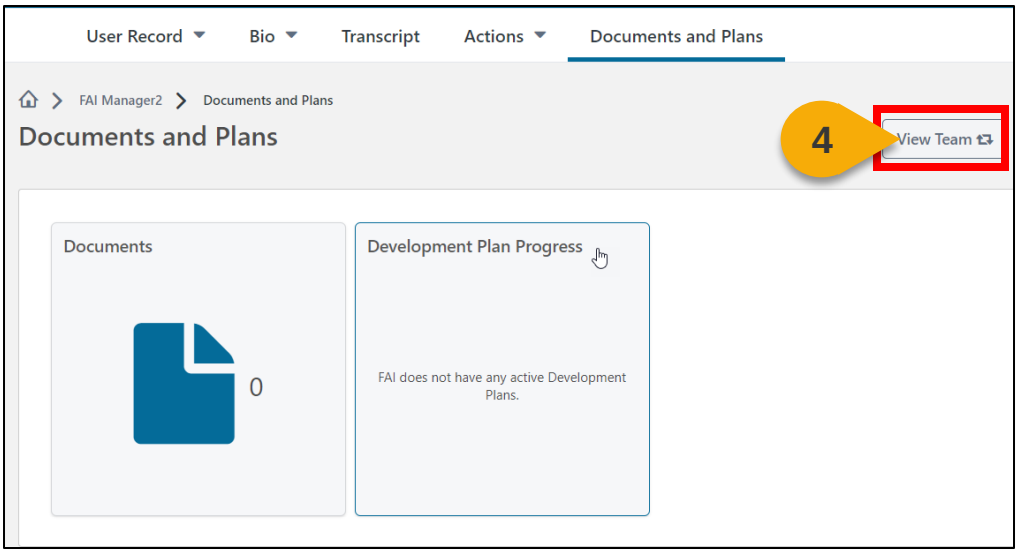
When you want to view your subordinate's user record…

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

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

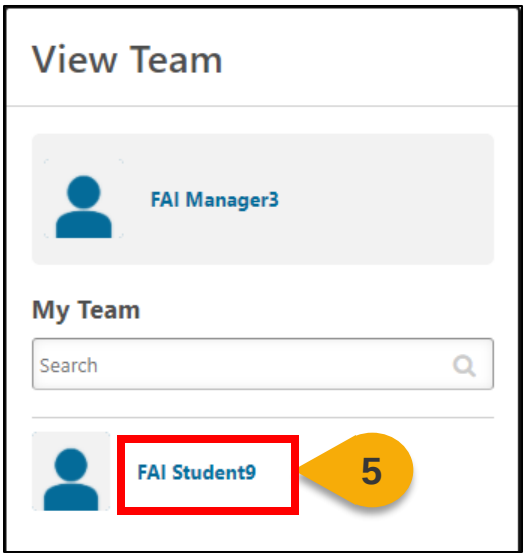


Step 4: Click on **View Team.**

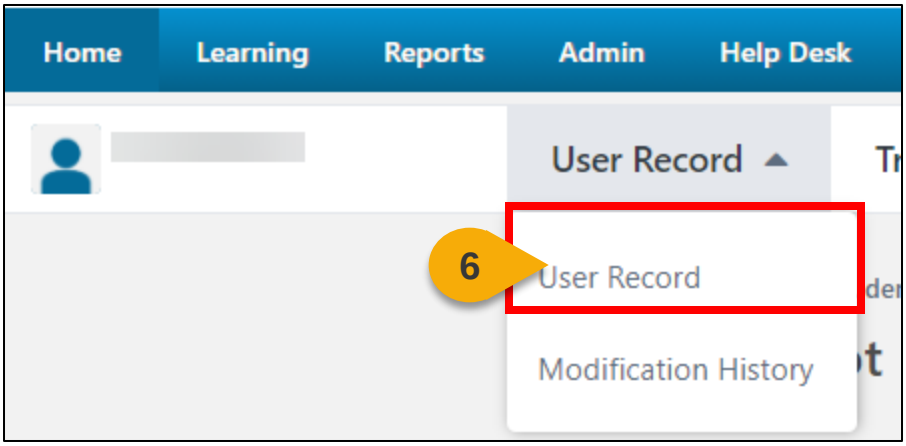


View User's Record (Cont.1)

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



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



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

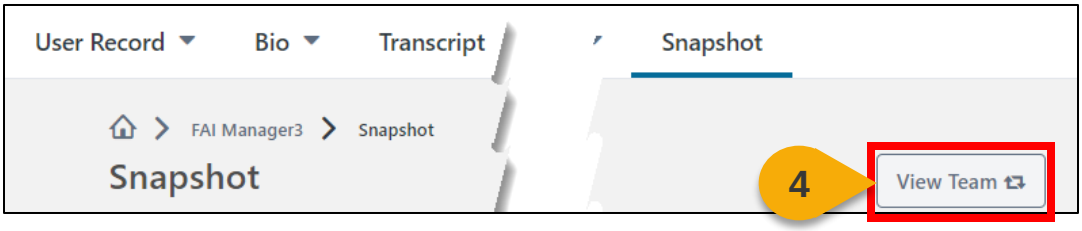
View User's Transcript

When you want to view your subordinate's transcript…

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

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

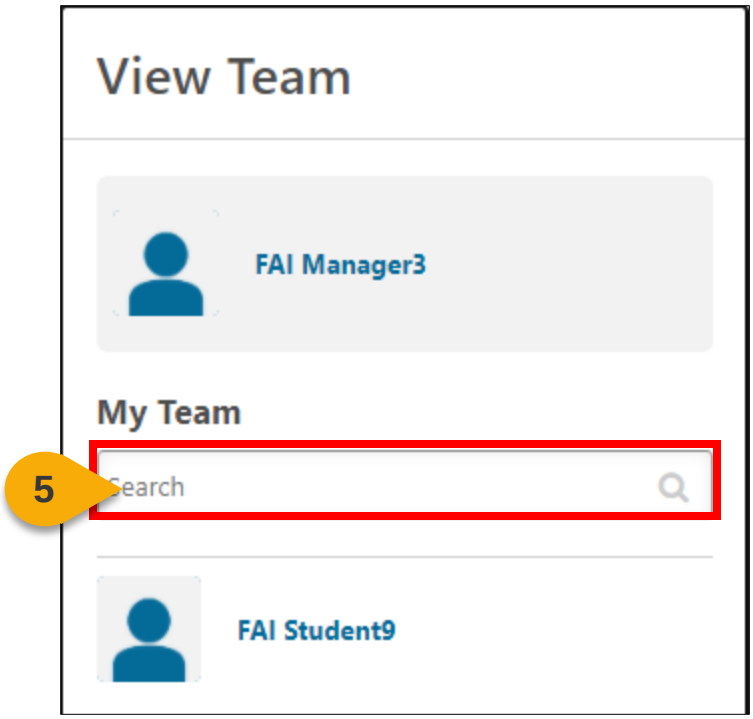
Step 4: Click on **View Team.**



View User's Transcript (Cont.1)

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

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

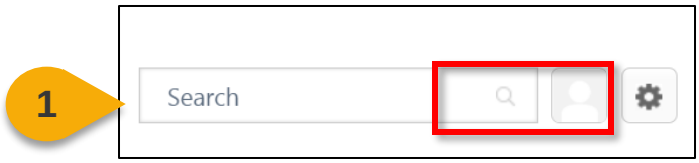


Use Global Search

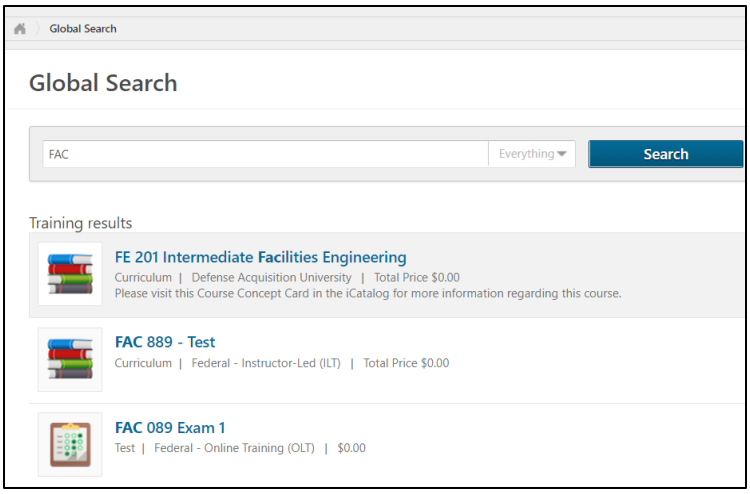
When you want to search for Training, Certifications, or Forms…

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

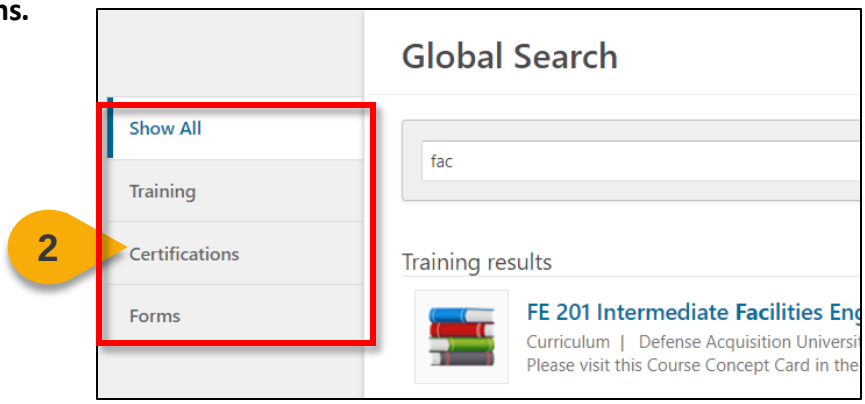
Step 1: Enter your desired Search Terms and click the **Magnifying Glass** or hit enter to search.



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



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

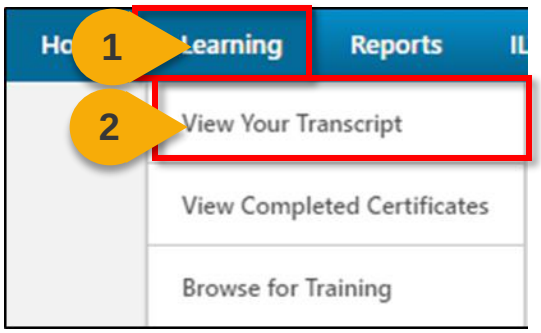


External Training

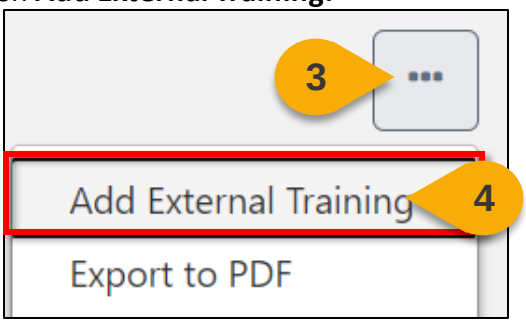
Request External Training Credit from Transcript

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

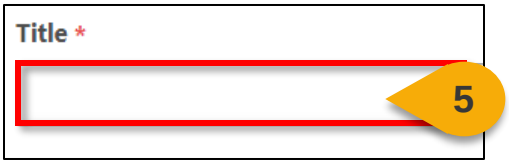
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript.**



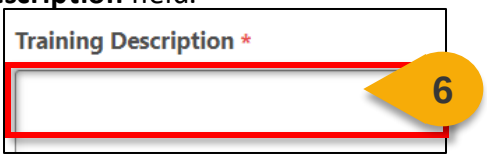
Steps 3 & 4: Click on the **ellipsis button** at the top left-hand corner. Then click on **Add External Training.**



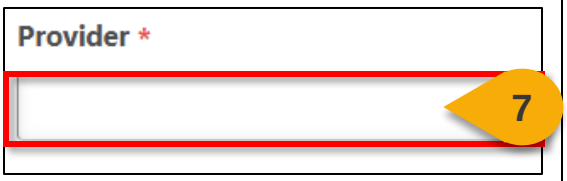
Step 5: Enter the title of your external training in the **Title** field.



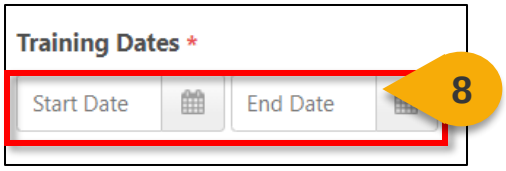
Step 6: Enter a description of the external training in the **Training Description** field.



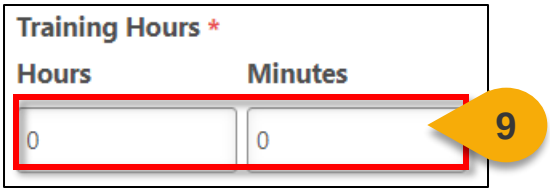
Step 7: Enter the name of the provider of the external training in the **Provider** field.



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

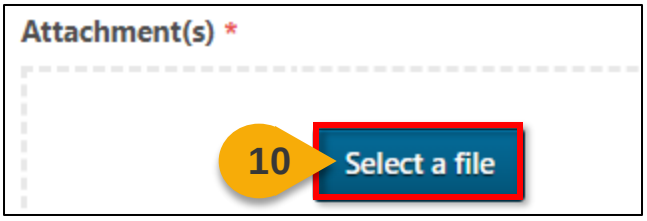


Step 9: Enter the training hours for your external training in the respective **Hours** and **Minutes** fields.

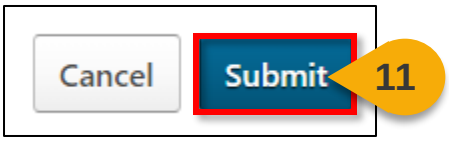


Request External Training Credit from Transcript (Cont.1)

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



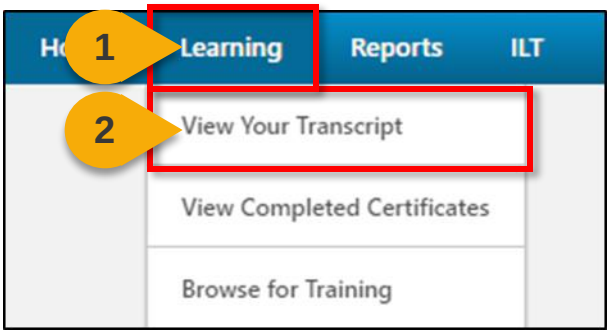
Step 11: Click **Submit** to submit the form for approval.



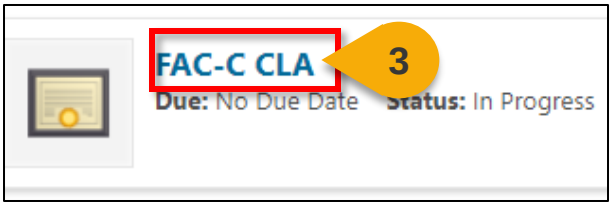
Request External Training Credit Within a Certification

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

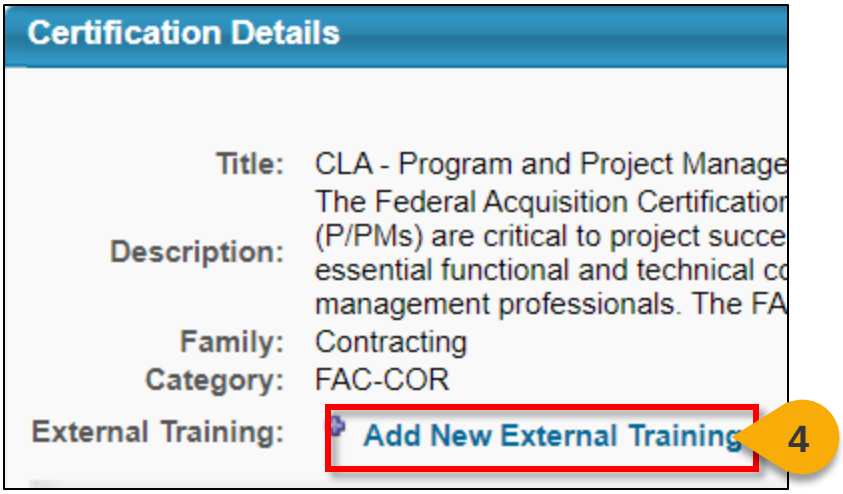
Steps 1 & 2: Hover over the **Learning** tab and click **View Your Transcript.**



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

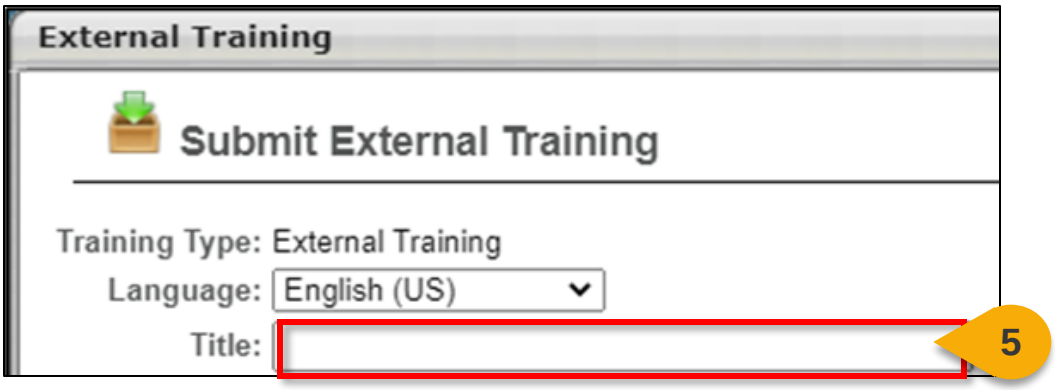


Step 4: Click on **Add New External Training.**

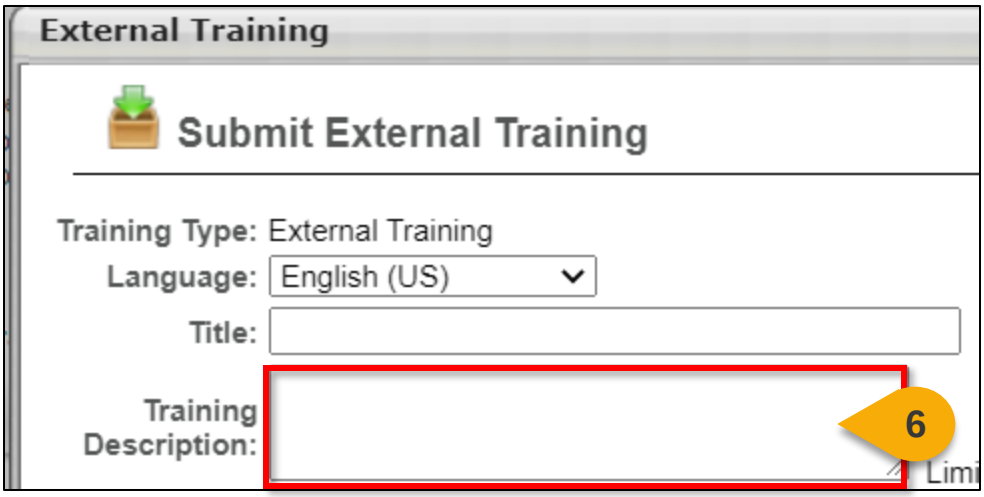


Request External Training Credit Within a Certification (Cont.1)

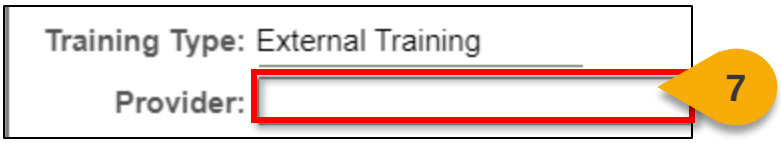
Step 5: A popup will appear. Enter the title in the **Title** field.



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



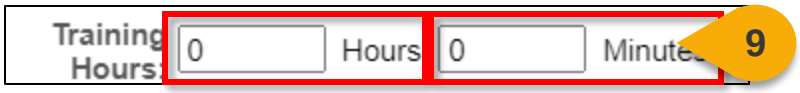
Step 7: Enter the name of the institution into the **Institution** field.



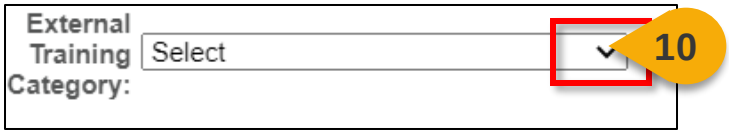
Request External Training Credit Within a Certification (Cont.2)

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

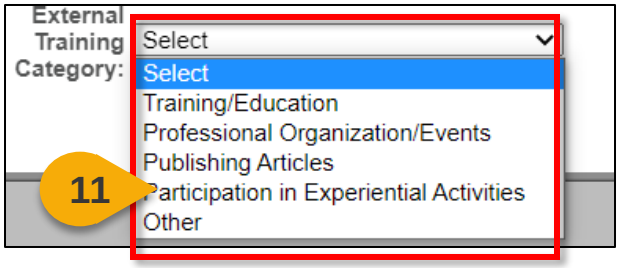
Step 9: Enter the number of hours and minutes of the external training into the **Training Hours** text fields.



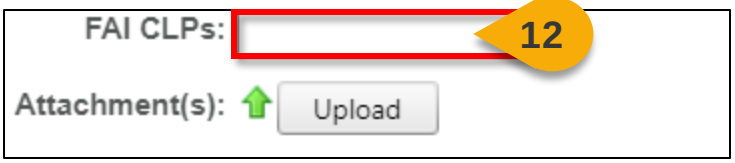
Step 10: Click the **dropdown button** next to the External Training category field



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



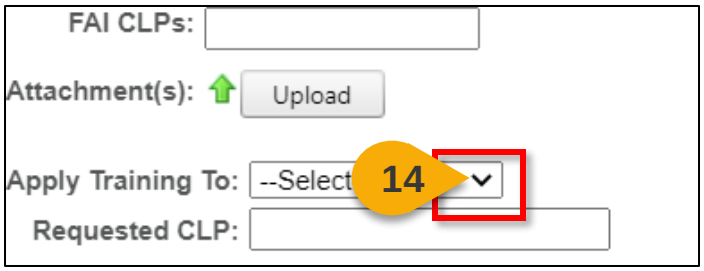
Step 12: Enter the number of CLPs into **the FAI CLPs** field.



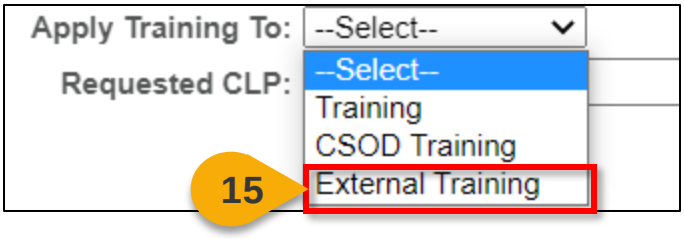
Request External Training Credit Within a Certification (Cont.3)

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

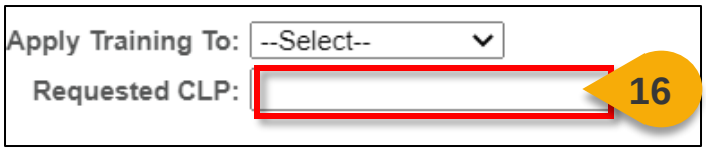
Step 14:: Click the **dropdown button** next to the Apply Training To field.



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

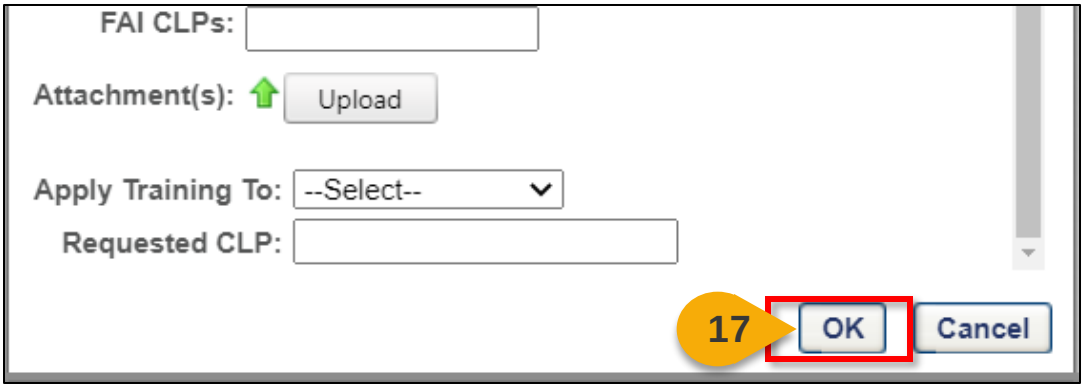


Step 16: Enter the **number of CLPs** earned in the Requested CLP field.



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

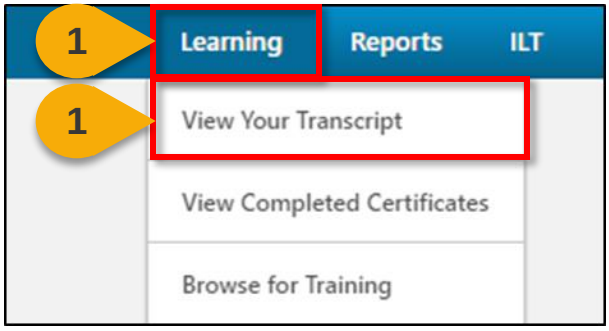
Step 17: Click **Ok** when you you've finished entering the information on your external training. This will submit the form to an External Training Approver.



Add External Training to a Certification

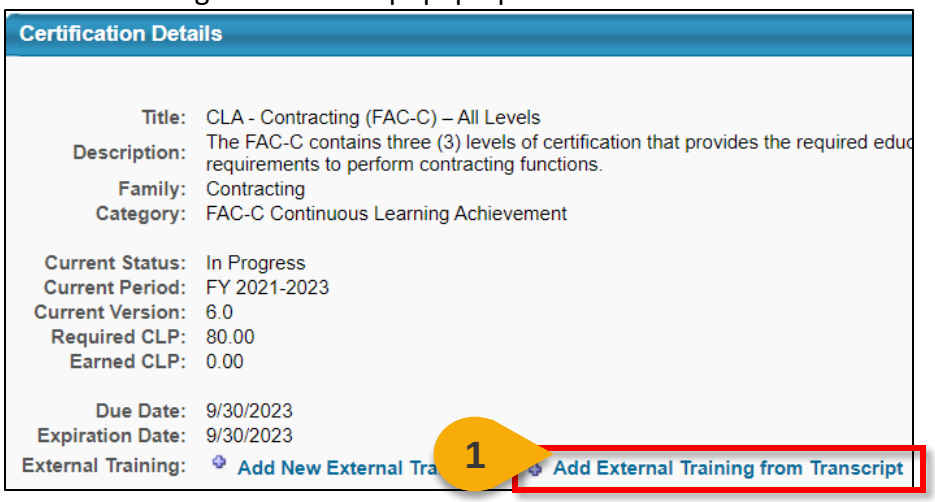
When you want to submit external training from your transcript to fulfill a certification requirement…

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



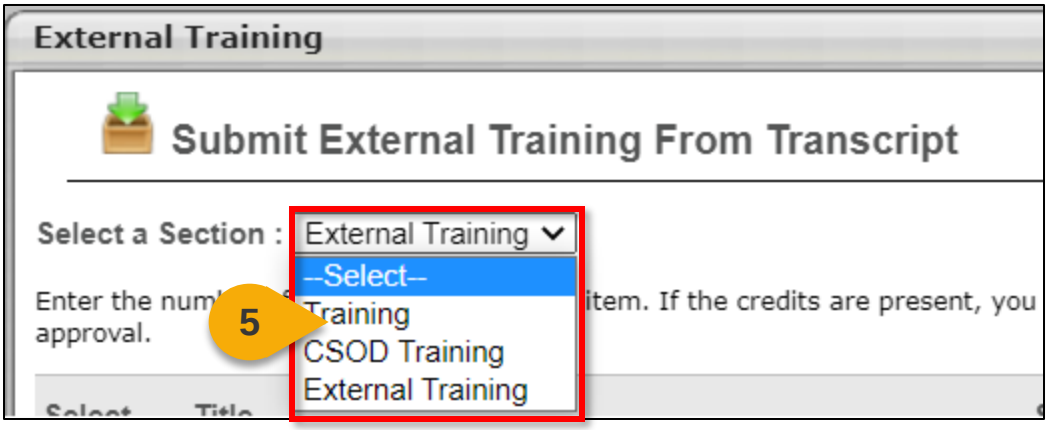
Step 3: Click on the **title** of the Certificate to which you'd like to add your external training.

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

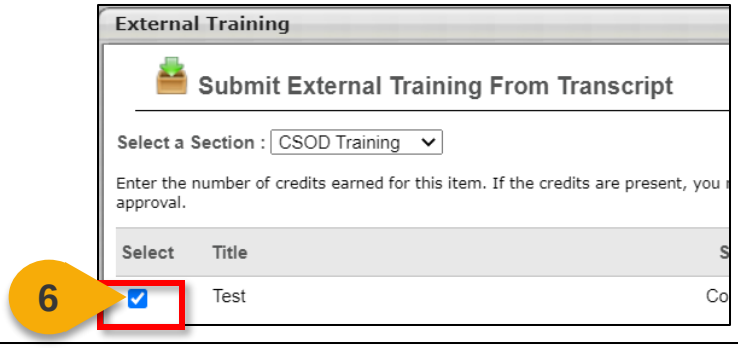


Add External Training to a Certification (Cont.1)

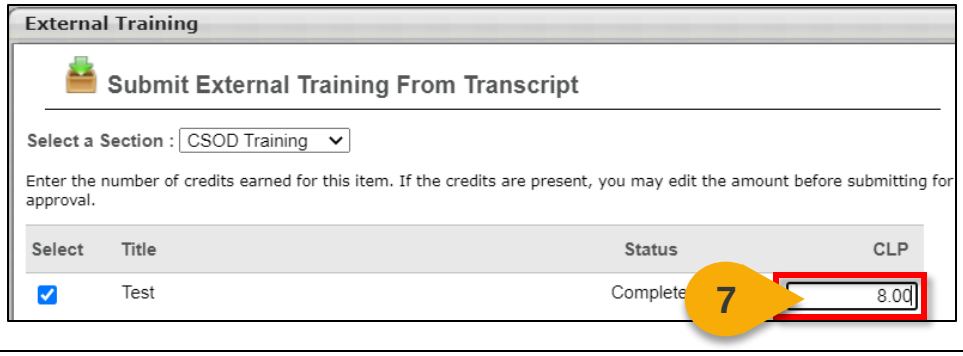
Step 5: Click the **dropdown** next to Select a Section to choose the section of the .certificate that the training will be applied to



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

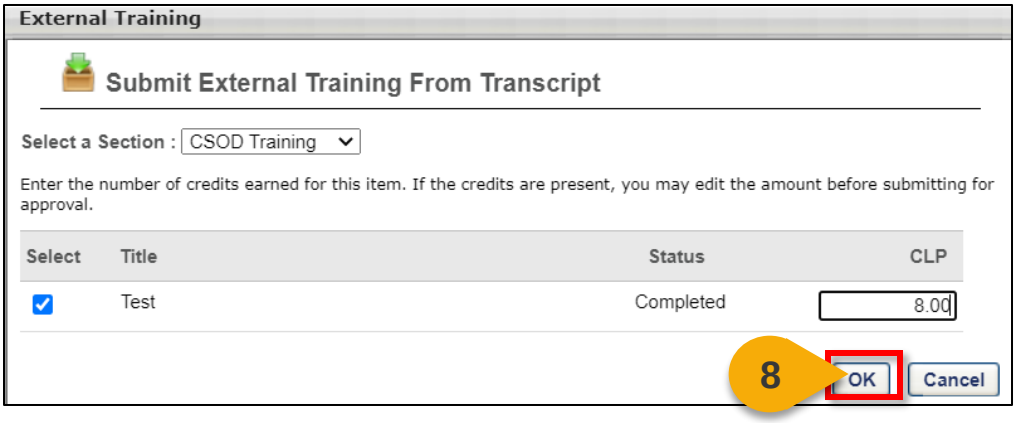


Step 7: In the **CLP** field to the right of the training item, enter the number of credits that were earned from the External Training.

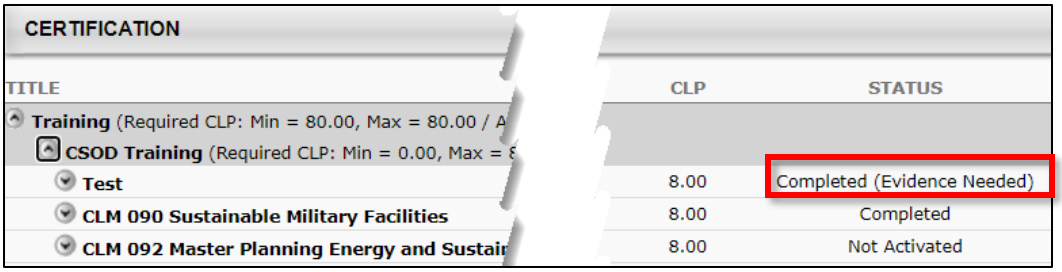


Add External Training to a Certification (Cont.2)

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



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

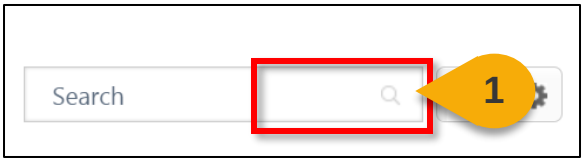


Online Training

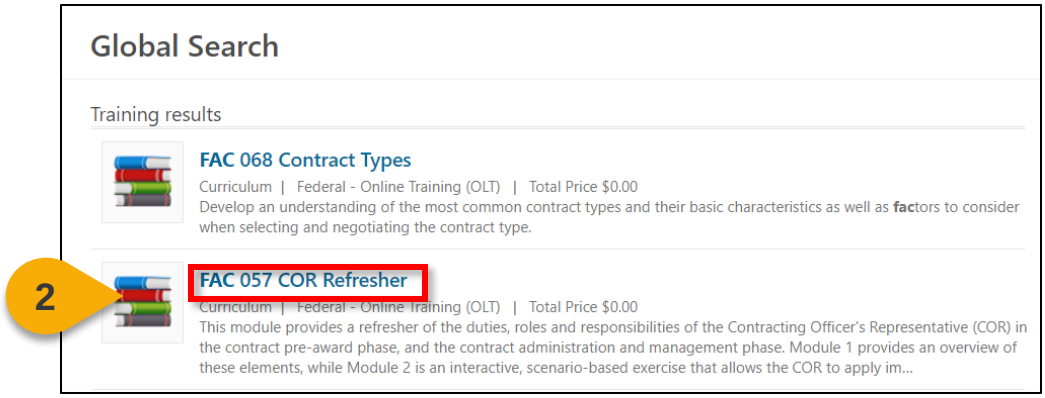
Register for Online Training (OLT)

When you want to register for Online Training…

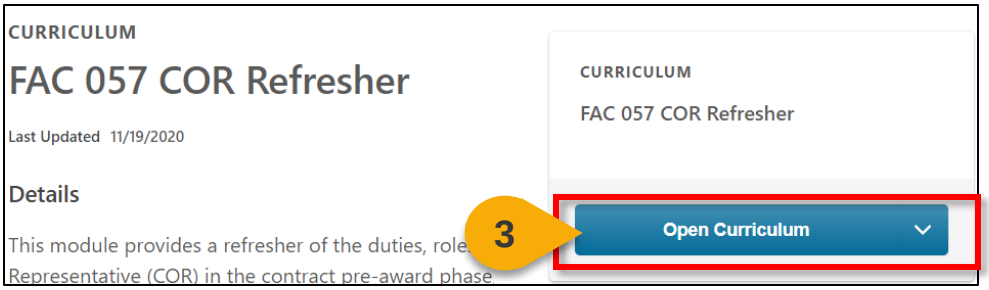
Step 1: Type the name of the OLT you would like to take into the Global Search box and click **the magnifying glass** or hit enter.

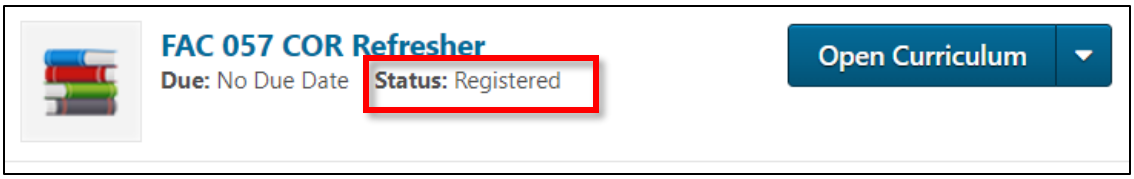


Step 2: Your search results will appear on the next page. Click the **title** of the OLT you would like to take.



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



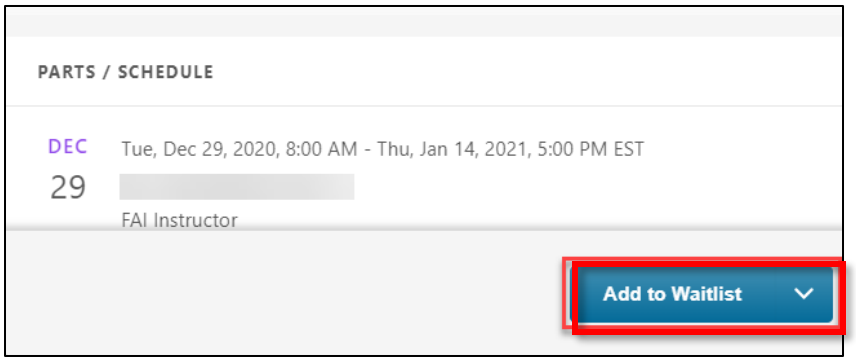


Submit an Exception Request

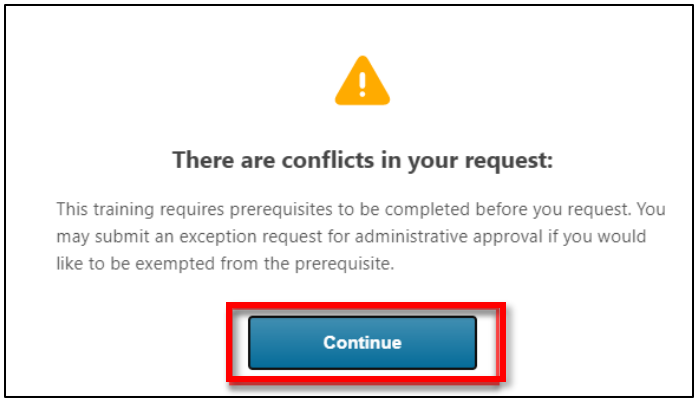
When you want to submit an Exception Request for a course prerequisite…

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

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



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



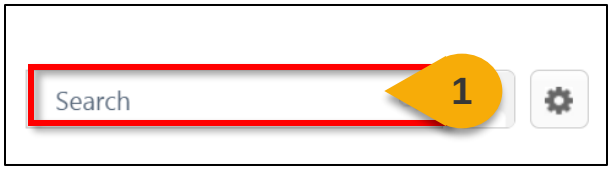
Step 3: The status for the session will change to **Exception Requested** on your transcript.

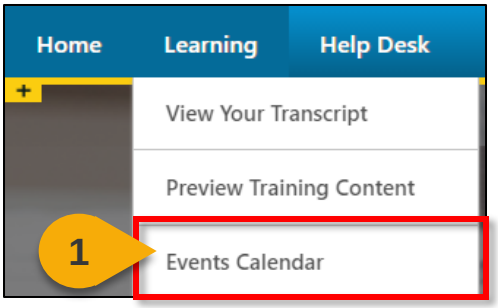
Instructor-Led Training

Register for Instructor-Led Training (ILT)

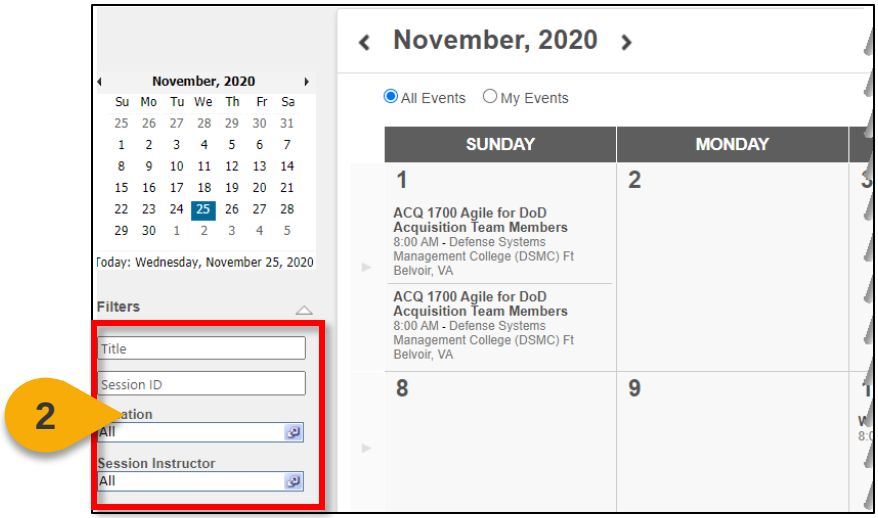
When you want to register for an Instructor Led Training…

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

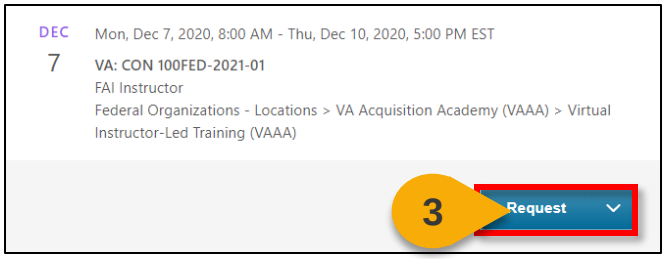




Step 2: On the Events Calendar, you can search **by Title, Session ID, Subject, or Instructor.**



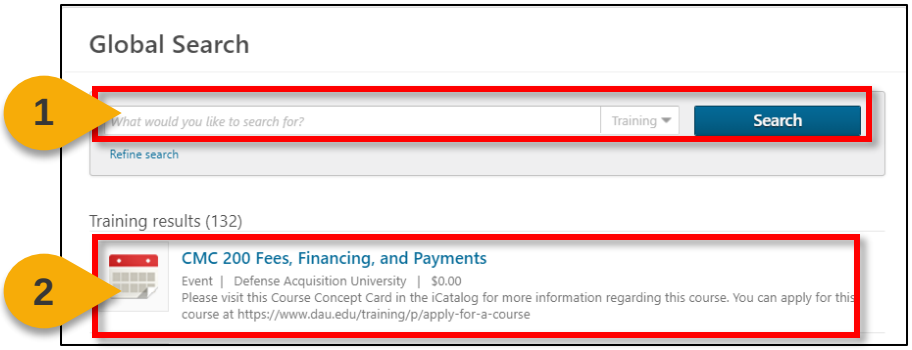
Step 3: The Event will be displayed on the screen. You will see any available Sessions. Next to the desired Session, click on **Request.**



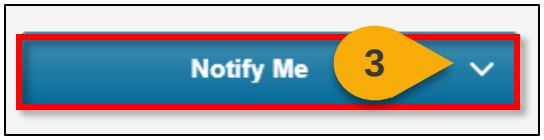
Indicate Interest in a Future Session

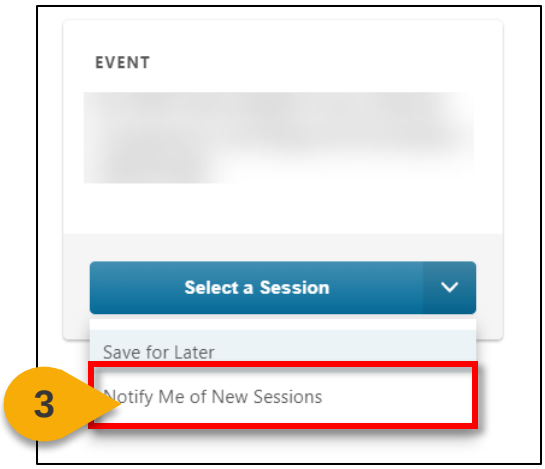
When interested in a course once new Sessions become available…

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

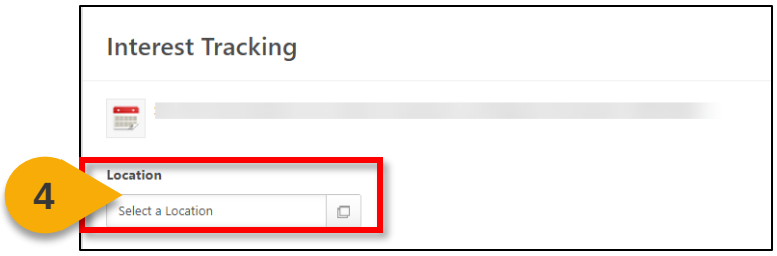


Step 3: On the on the Event page, click either the **Notify Me or Notify Me of New Sessions button.**



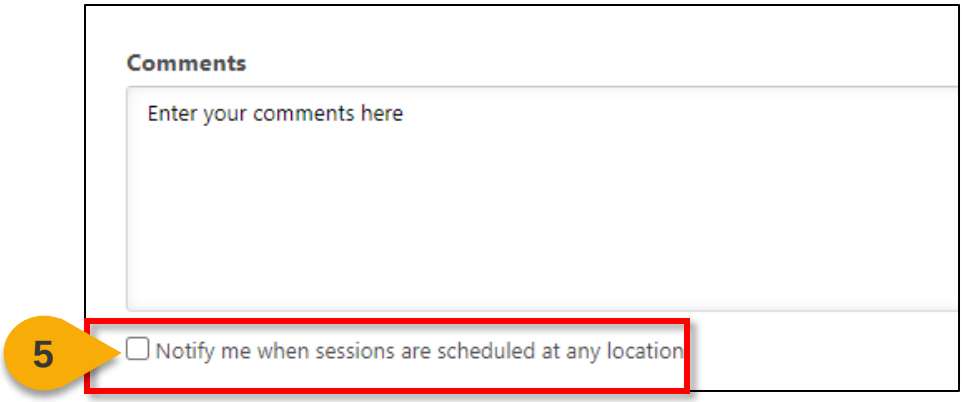


Step 4: You have the option to select to be notified of Sessions held in a specific location. Enter the **Location** field to do this.



Indicate Interest in a Future Session (Cont. 1)

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

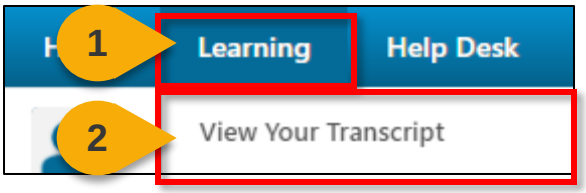


Step 6: Once you have completed selecting the location preferences, click the **Submit** button at the bottom of the page.

Withdraw from an ILT

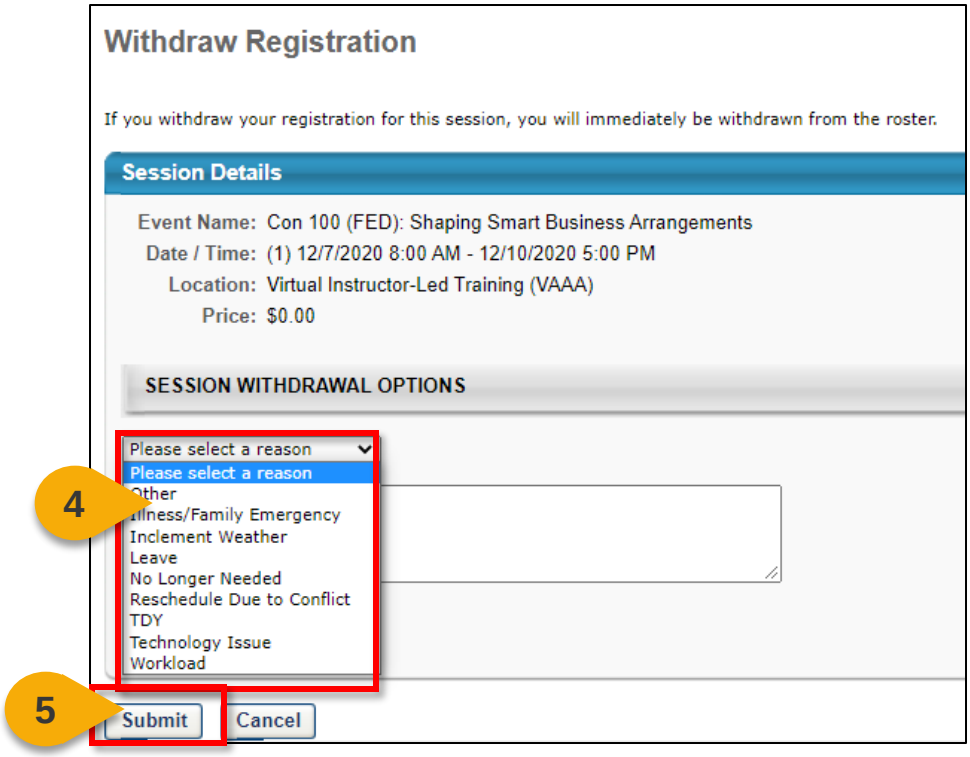
When you need to withdraw from an ILT course…

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



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

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

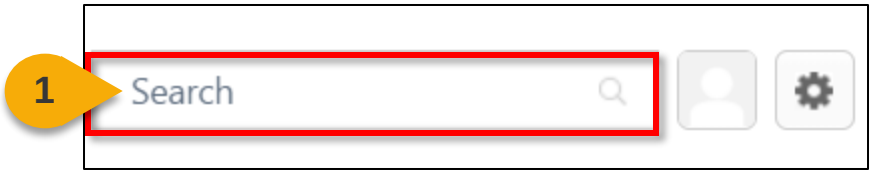


Certifications

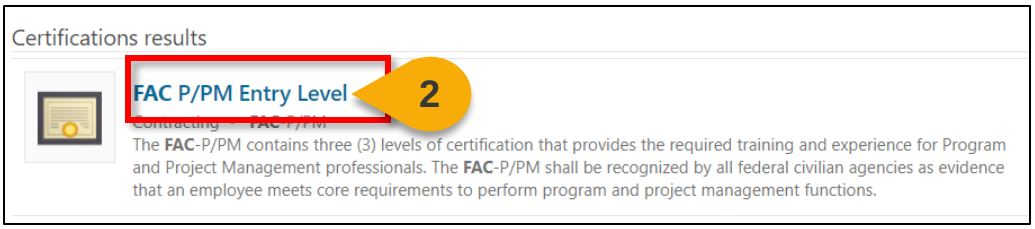
Request and Manage a Certification

When you want to request a Certification…

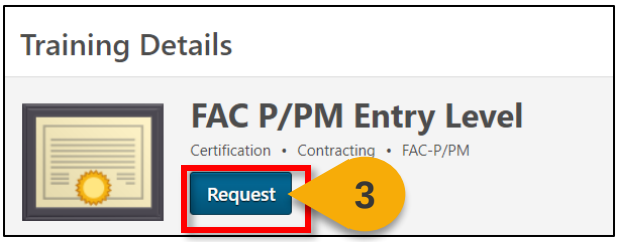
Step 1: In Global Search, type in the Certification you wish to request and click the Magnifying Glass.



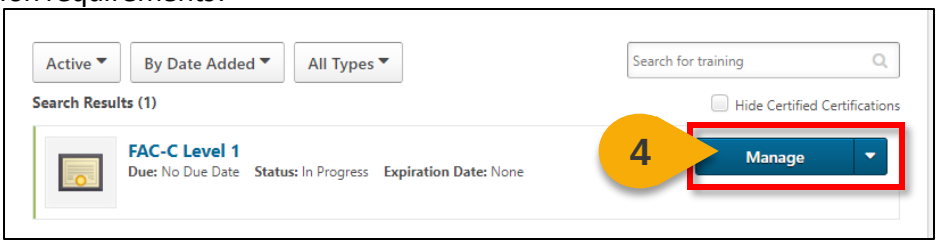
Step 2: Click on the **Certification** you'd like in the results.



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

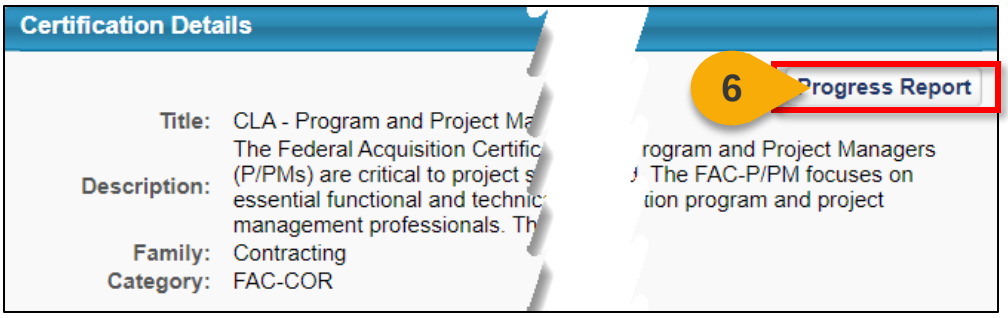


Step 4: You will be directed to your Transcript page. The Certification will be listed on the screen under Active courses with "In Progress" status. Click **Manage** to view the Certification requirements.

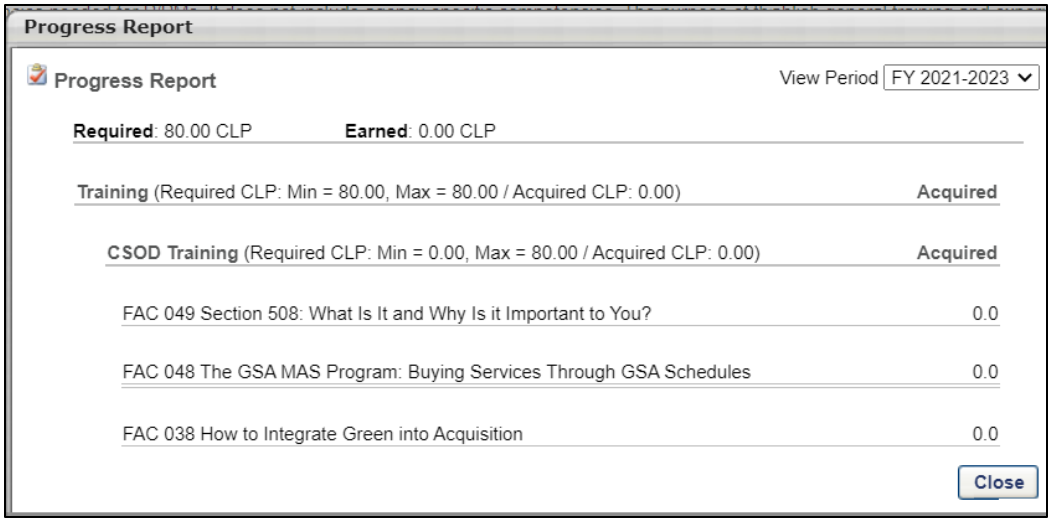


Request and Manage a Certification (Cont.1)

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.

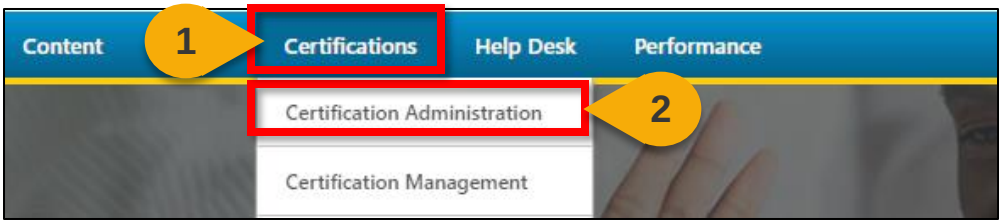


Warrant Operations

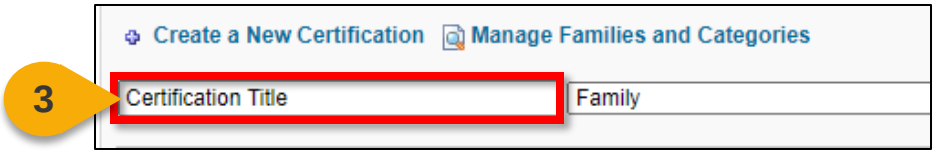
View Warrant Certification Information

When you want to view Warrant Certification information…

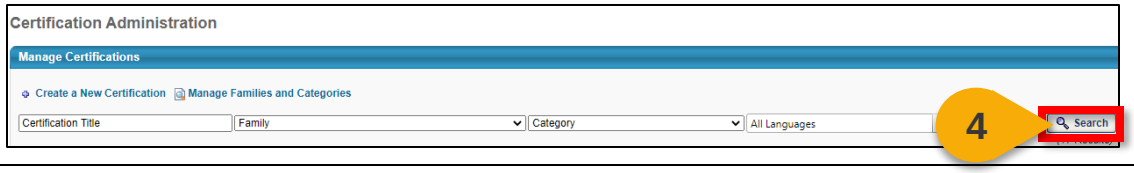
Steps 1 & 2: Hover over the **Certifications** tab, then click **Certification Administration**.



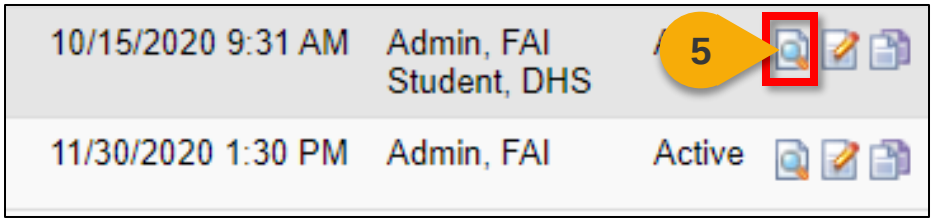
Step 3: Type in the name of the Warrant Certification in the **Certification Title** field. Alternatively, you can use the other search criteria available on this page.



Step 4: Click **Search**.

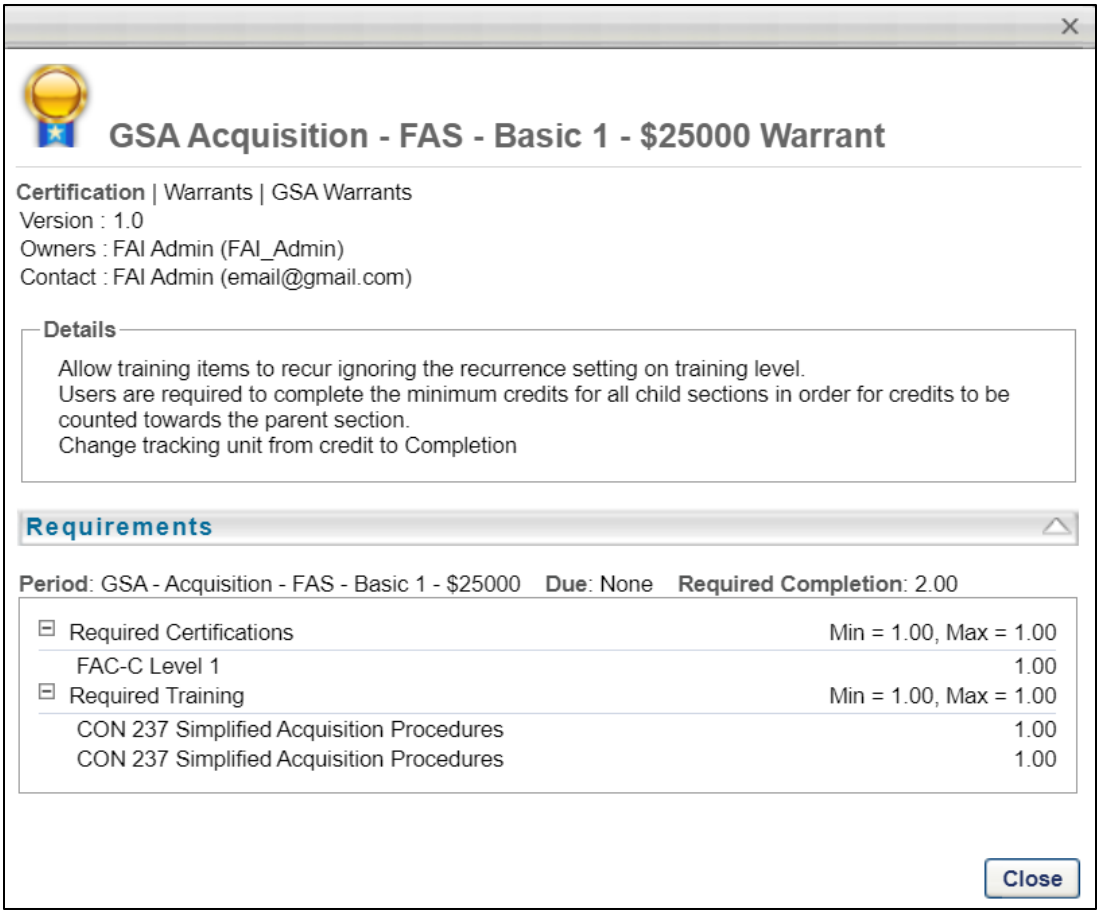


Step 5: Click on the **Magnifying Glass** icon to view information on the Warrant Certification of your choice.



View Warrant Certification Information (Cont.1)

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



GSA Acquisition - FAS - Basic 1 - $25000 Warrant

Certification | Warrants | GSA Warrants
Version : 1.0
Owners : FAI Admin (FAI_Admin)
Contact : FAI Admin (email@gmail.com)

Details

Allow training items to recur ignoring the recurrence setting on training level.
Users are required to complete the minimum credits for all child sections in order for credits to be counted towards the parent section.
Change tracking unit from credit to Completion

Requirements

Period: GSA - Acquisition - FAS - Basic 1 - $25000 **Due**: None **Required Completion**: 2.00

Required Certifications	Min = 1.00, Max = 1.00
FAC-C Level 1	1.00
Required Training	Min = 1.00, Max = 1.00
CON 237 Simplified Acquisition Procedures	1.00
CON 237 Simplified Acquisition Procedures	1.00

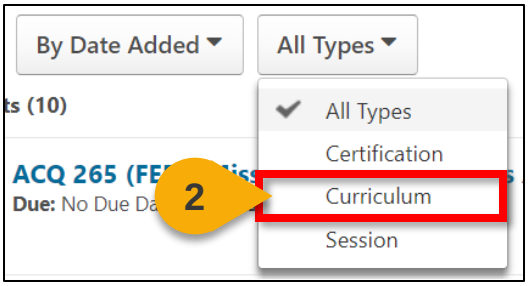
Close

Edit Warrant Details

When you want to update Warrant Fields for a User…

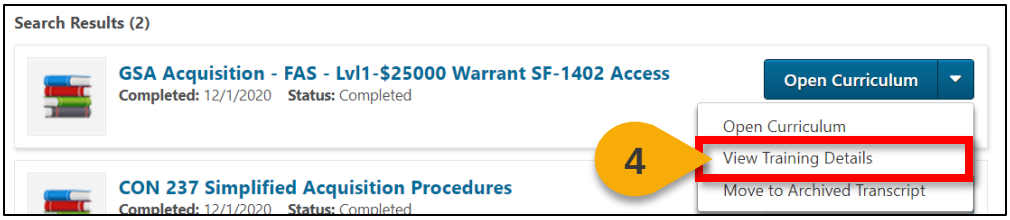
Step 1: Use the "View Transcript" task aid to find the Transcript of the User who has a curriculum that requires Warrant information. At the top of the User's Transcript, click on **All Types**.

Step 2: Click **Curriculum** to view only the curricula on the User's Transcript.



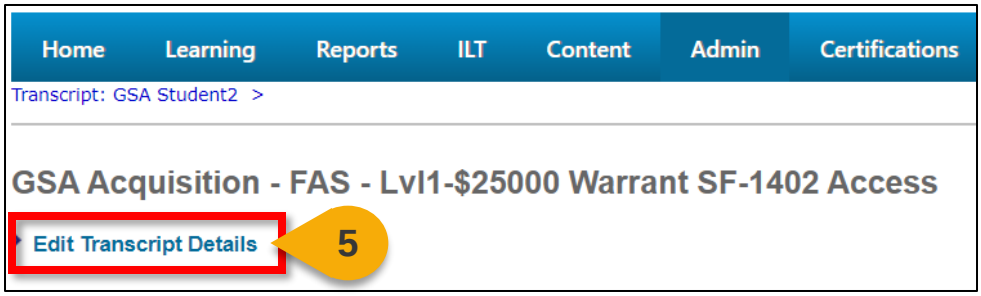
Step 3: Click the drop-down **arrow** to the right of the curriculum name.

Step 4: Select **View Training Details** from the drop-down list.

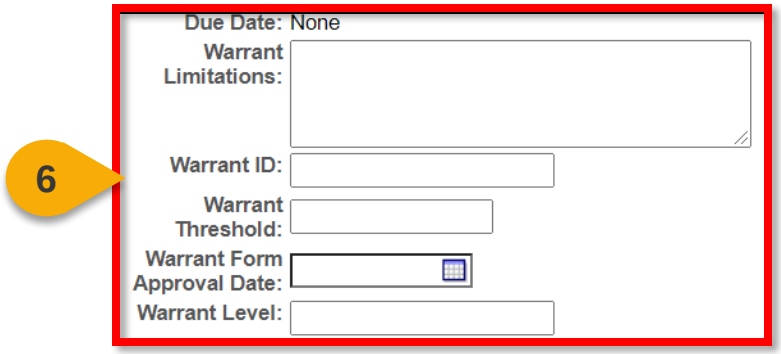


Edit Warrant Details (Cont.1)

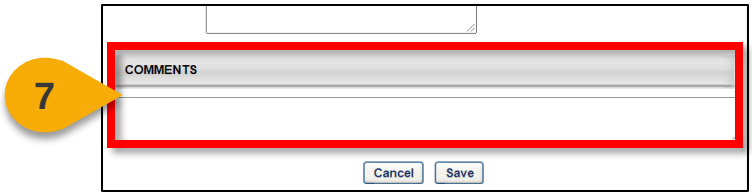
Step 5: At the top of the page, click the **Edit Transcript Details** link.



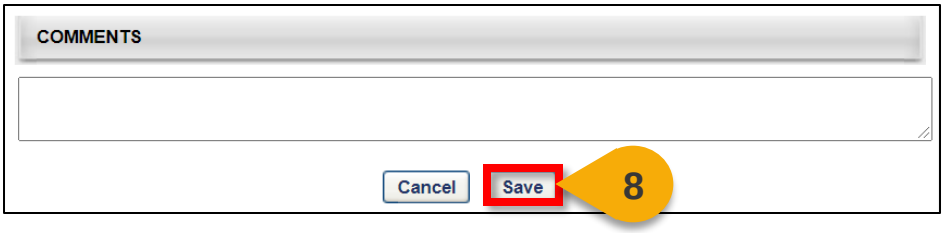
Step 6: Add the appropriate information for the **Warrant Limitations**, **Warrant ID**, **Warrant Threshold**, **Warrant Form Approval Date**, and **Warrant Level**.



Step 7: Add a comment in the **Comments** section to explain the updates you made.



Step 8: At the bottom of the page, click **Save**.



Edit Warrant Details (Cont.2)

The fields will update. You can now notify the user they can complete the curriculum. Once the curriculum is complete, the updated fields will appear on the User's certificate (SF-1402). Note: If the user completes the curriculum prior to the information being added, this data will not populate on the certificate.

Warrant Limitations:	Test Warrant Limitation Verbiage. Test Warrant Limitation Verbiage. Test Warrant Limitation Verbiage. Test Warrant Limitation Verbiage. Test Warrant Limitation Verbiage. Test Warrant Limitation Verbiage. Test Warrant Limitation Verbiage. Test Warrant Limitation Verbiage.
Warrant ID:	987654321
Warrant Threshold:	100000
Warrant Form Approval Date:	12/5/2020
Warrant Level:	Basic - 1

Certificate of Appointment

Under authority vested in the undersigned and in conformance with Subpart 1.6 of the Federal Acquisition Regulation

[USERNAME]

is appointed

Contracting Officer

for the

United States of America

Subject to the limitations contained in the Federal Acquisition Regulation and to the following:

Warrant Level: [CUSTOM_LO_USER].[WARRANT.LEVEL].[VALUE_ID] Max Dollars:[CUSTOM_LO_USER].[WARRANT.THRESHOLD].[VALUE_ID]

[CUSTOM_LO_USER].[WARRANT.LIMITATIONS].[VALUE_ID]

Unless sooner terminated, this appointment is effective as long as the appointee is assigned to:

Agency: General Services Administration

Award Date:[CUSTOM_LO_USER].[WARRANT_FORM_APPROVAL_DATE].[VALUE_ID]

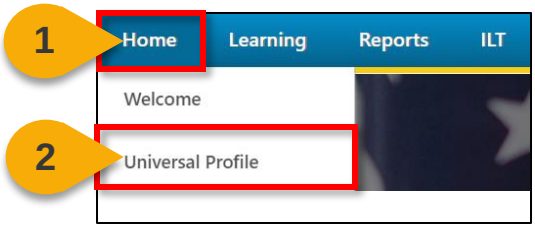
Warrant ID: [CUSTOM_LO_USER].[WARRANT.ID].[VALUE_ID]

Authority: Head of Contracting Activity

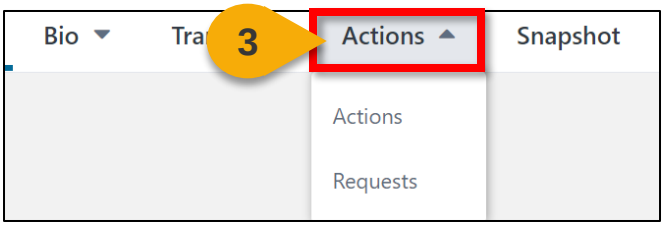
Approve/Deny/Return Warrant Application

When you want to approve/deny/return a Warrant application…

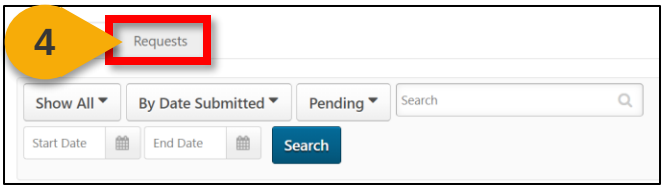
Steps 1 & 2: Hover over the **Home** tab, then select **Universal Profile**.



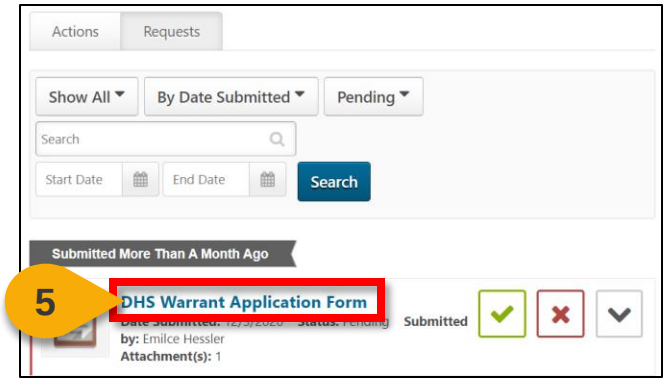
Step 3: Hover over the **Actions** tab to view the drop-down.



Step 4: Click the **Requests** tab to view the requests available for approval.

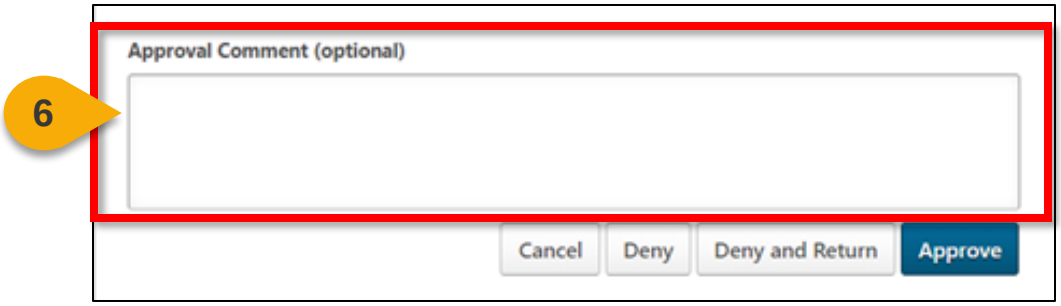


Step 5: Click the **Warrant Application title** to view the submission.



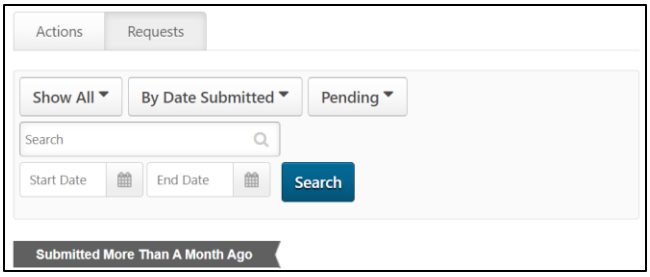
Approve/Deny/Return Warrant Application (Cont.1)

Step 6: Review the information. Add any comment to the **Comments** box to justify your decision.



Step 7: At the bottom of the form, click the **Deny, Deny and Return,** or **Approve** buttons as appropriate.

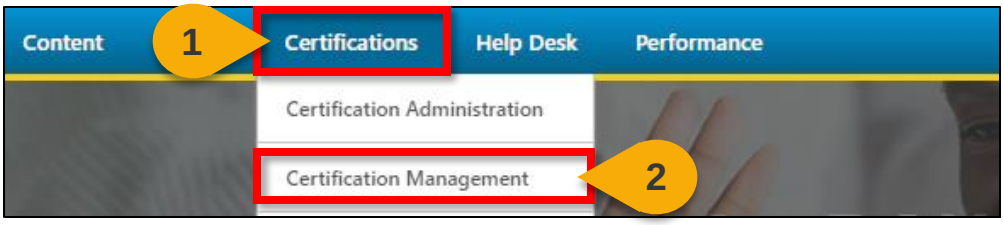
You will be returned to the Requests page and the User will see an updated status in their Plans & Documents tab.



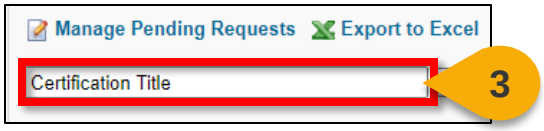
Revoke a Warrant

When you want to revoke a Warrant Certification for a User…

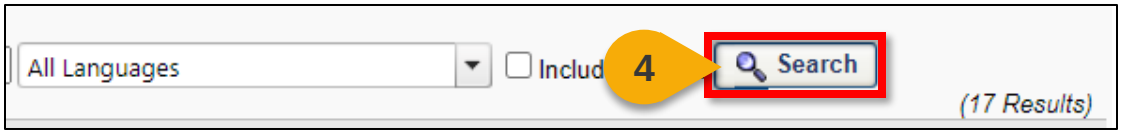
Steps 1 & 2: Hover over the **Certifications** tab and click **Certification Management**.



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

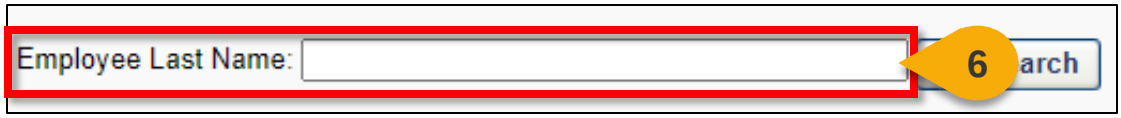


Step 4: Click **Search**.



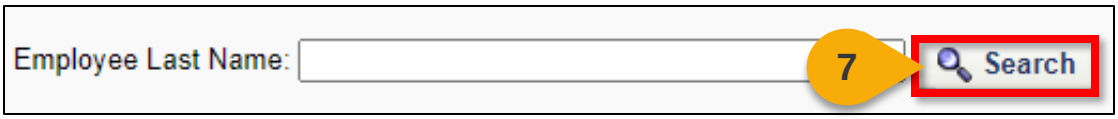
Step 5: Locate the Warrant Certification you wish to revoke and click the **View Users** icon in the Options column.

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



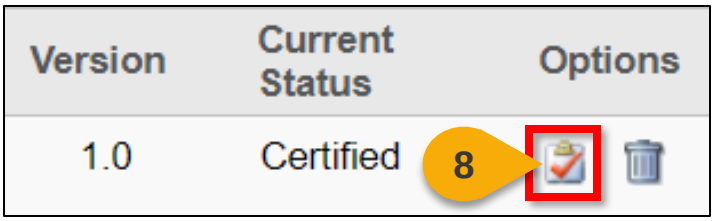
Revoke a Warrant (Cont.1)

Step 7: Click **Search**.

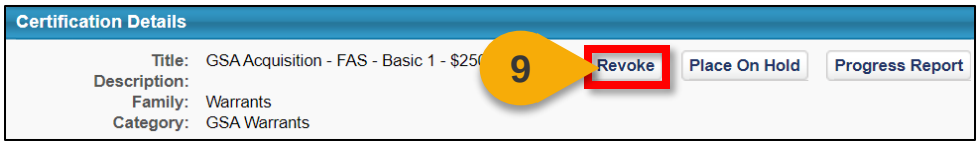


Step 8: Locate the User whose Warrant Certification you wish to revoke. Click the **clipboard** icon in the Options column.

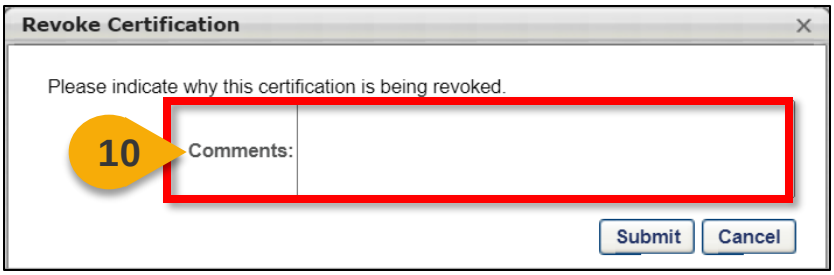
`



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

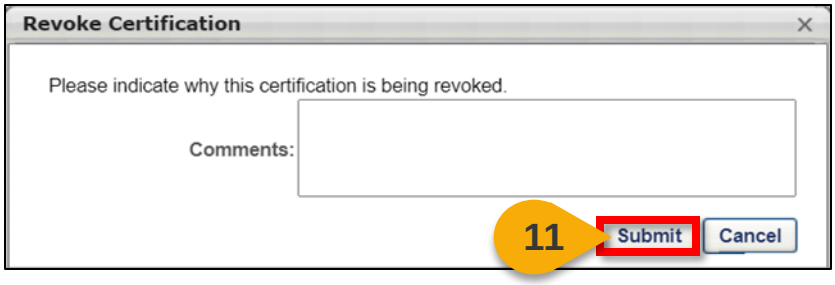


Steps 10: A pop-up warning will appear. Enter a comment in the **Comments** field to explain why the Warrant Certification is being revoked.



Revoke a Warrant (Cont.2)

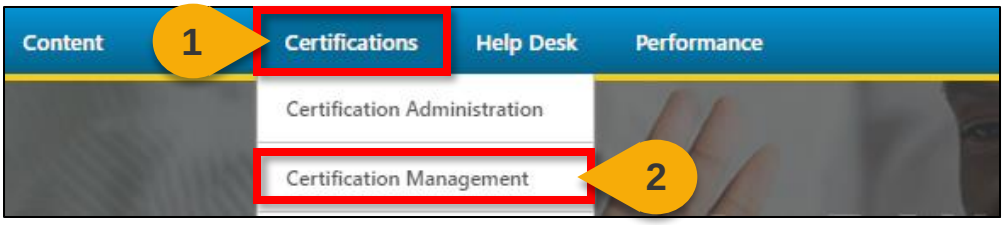
Step 11: Click **Submit.** The Certification Transcript page will reflect the Revoked status in the Status column. If the User would like to become re-certified, they must re-request the Certification or it must be reassigned.



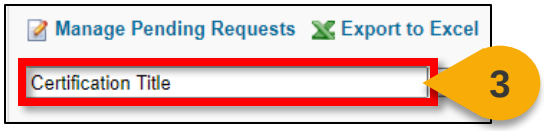
Put a Warrant Certification on Hold

When you want to put a User's Warrant Certification on hold…

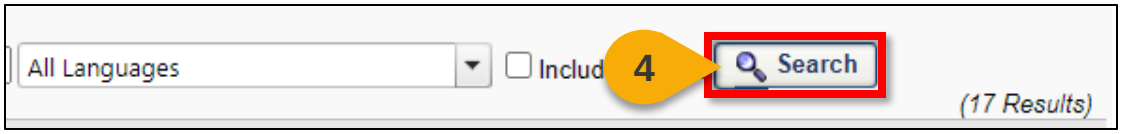
Steps 1 & 2: Hover over the **Certifications** tab and click **Certification Management**.



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

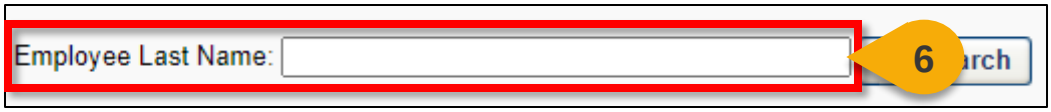


Step 4: Click **Search**.



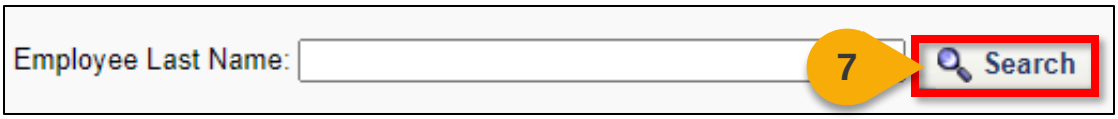
Step 5: Locate the Warrant Certification you wish to put on hold and click the **View Users** icon in the Options column.

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

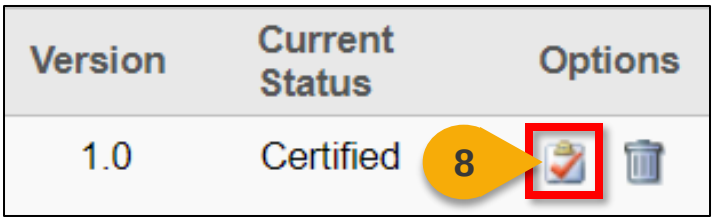


Put a Warrant Certification on Hold (Cont.1)

Step 7: Click **Search**.

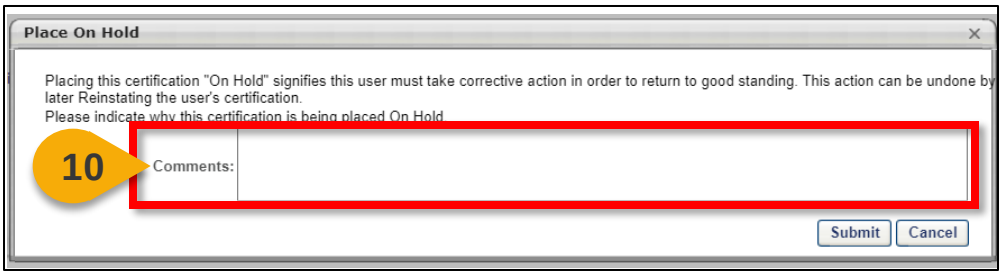


Step 8: Locate the User whose Warrant Certification you wish to put on hold. Click the **clipboard** icon in the Options column.



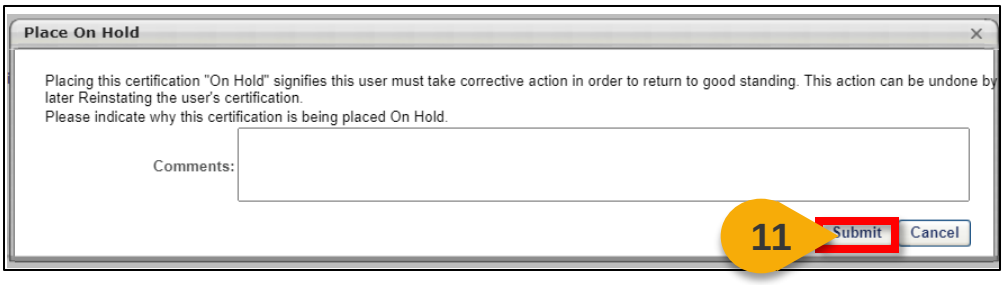
Step 9: In the top right corner of the screen, click the **Place on Hold** button.

Step 10: A pop-up warning will appear. Enter a comment in the **Comments** field to explain why the Warrant Certification is being placed on hold.



Put a Warrant Certification on Hold (Cont.2)

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



Individual Development Plans

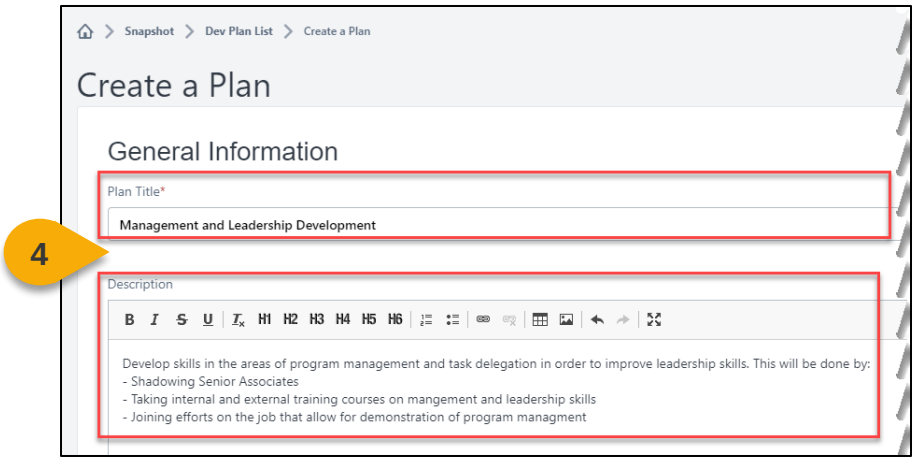
Create an IDP

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.**

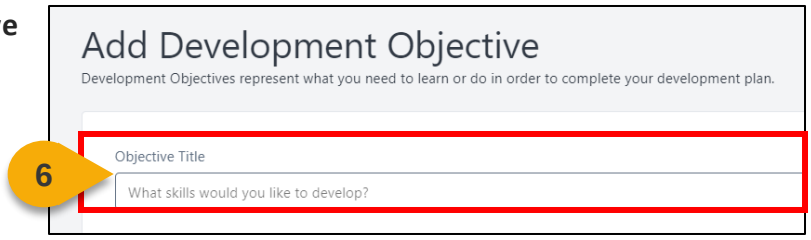
Step 4: Add a **Plan Title** and **Description** to your IDP.



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

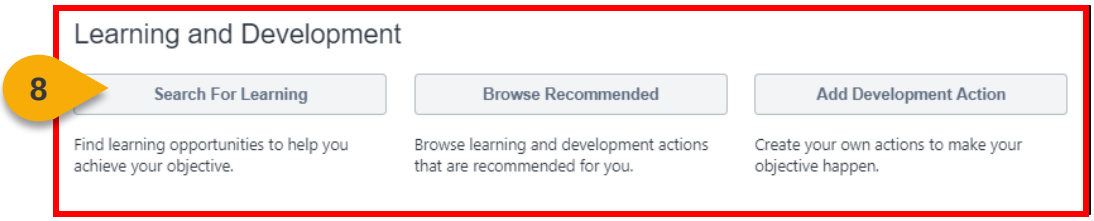
Create an IDP (Cont. 1)

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**.



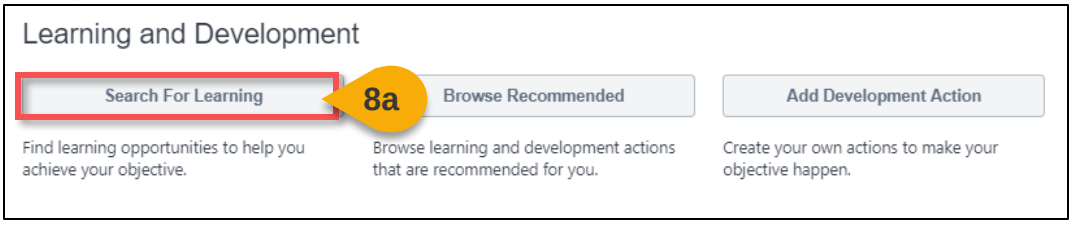
Search for Learning: Encompasses training sessions provided. It allows you to select online sessions.

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

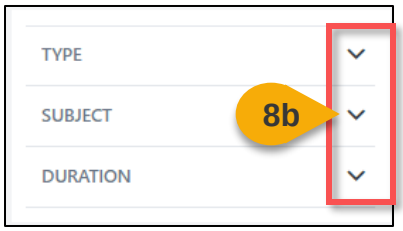
Add Development Action: Free text that allows you to add any external training or action item you wish to include in order to develop yourself professionally.

Create an IDP (Cont. 2)

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

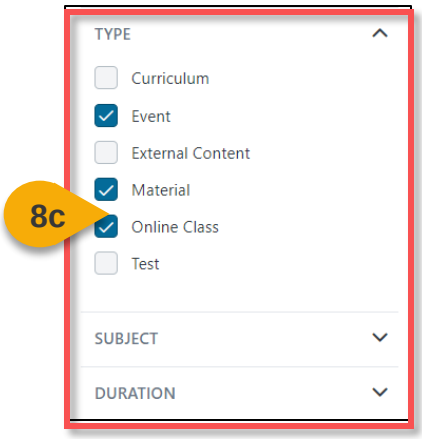


Step 8b: All the available courses will be displayed on the screen. To filter the results displayed, click on the **arrows next to the filter options** to the left of the page.



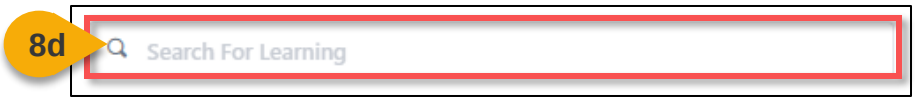
Step 8c: The filter options will expand on the screen. Select the filter you wish to apply by clicking on the **checkboxes** next to each option.

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



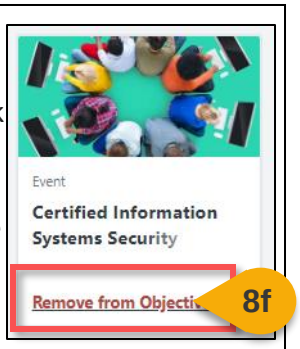
Create an IDP (Cont. 3)

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

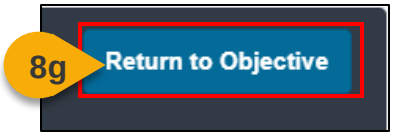


Step 8e: Select the **Add to Objective** link beneath any training you want to add. Multiple training courses can be selected.

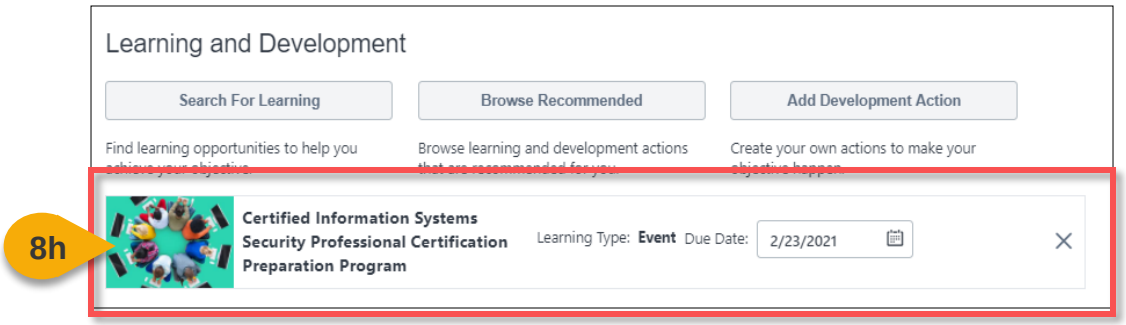
Step 8f: If you change your mind, simply click on **Remove from Objective** and the course will be removed from your IDP.



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.

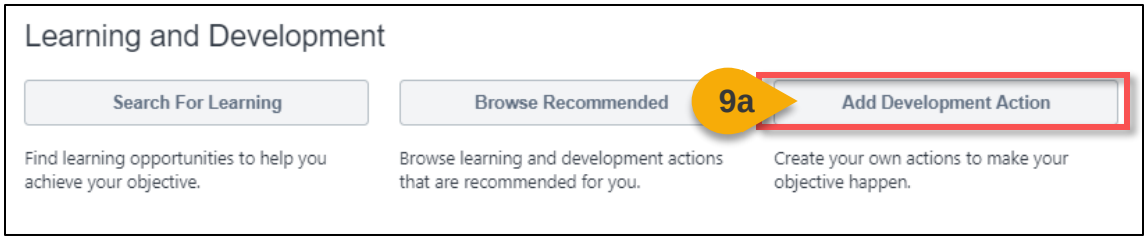


Step 8h: The course(s) selected will appear on the main **Objective** screen. By default, the training due date is set up to be due 6 months from now, but this date is editable. Notice that the training can be removed from your Objective by clicking on the **X icon** next to it.



Create an IDP (Cont. 4)

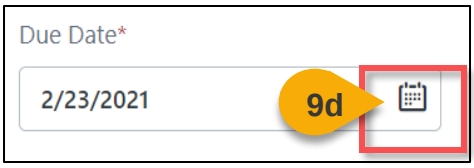
Step 9a: To add action items not in the CSOD catalog to your IDP Objective, click on **Add Development Action**.



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

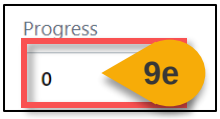
Step 9c: Select the **activity type** from the Activity Type dropdown menu.

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.

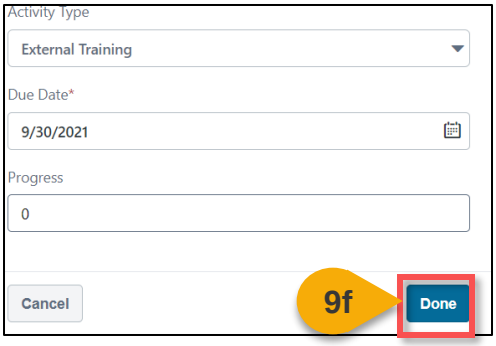


Create an IDP (Cont. 5)

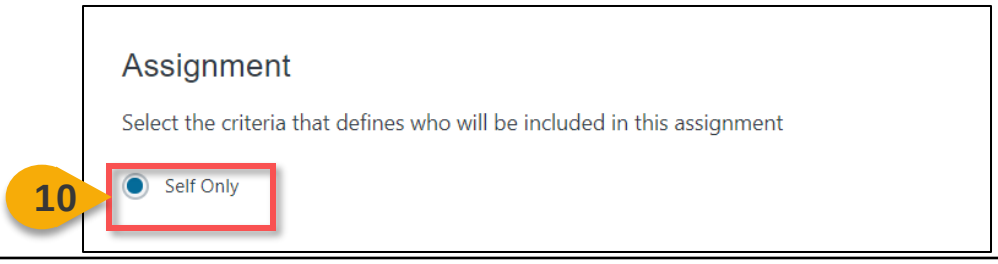
Step 9e: Update the **Progress** you have made as applicable. This is a percentage, but you don't need to type "%", just the number, e.g., for 25%, type in "25".



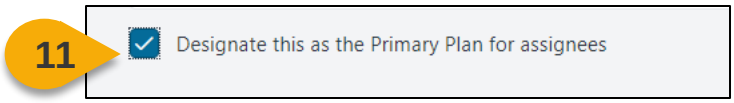
Step 9f: Click **Done** to add the activity to your IDP.



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**.



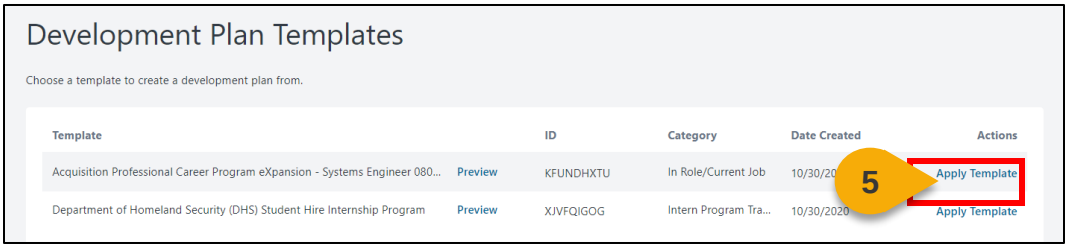
Create an IDP from a Template

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.**

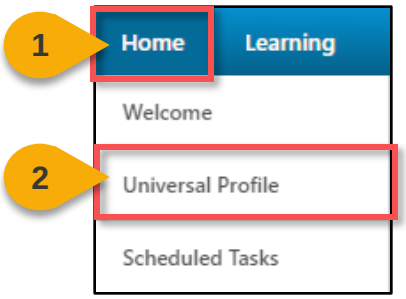
Step 5: Select the template you want to use and click **Apply Template.** You can edit the template or submit it for approval as-is.



Update IDP

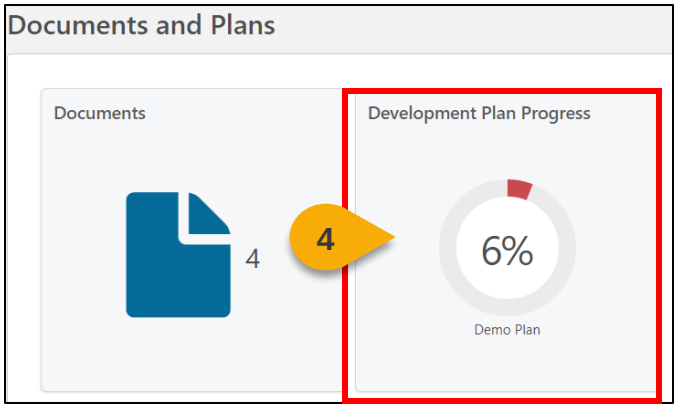
When you want to update an IDP Objective, Training or Action Step…

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.

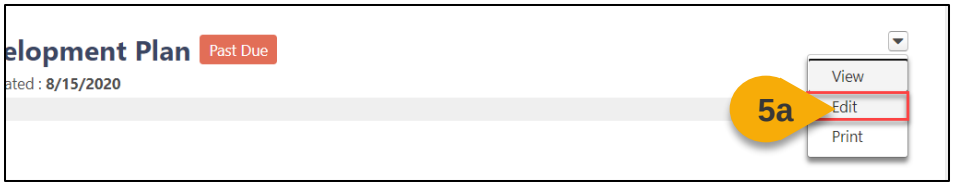


Note: You can also navigate to the IDP using the Performance tab and then clicking on Development Plans.

Update IDP (Cont. 1)

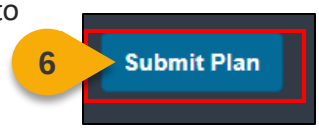
If you wish to add a new Objective to your IDP, follow steps 5a – 5b below.

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).

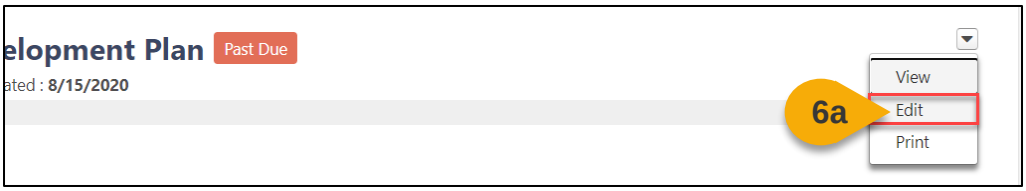
Step 6: Click on the **Submit Plan** button when you are ready to resubmit your plan for approval.



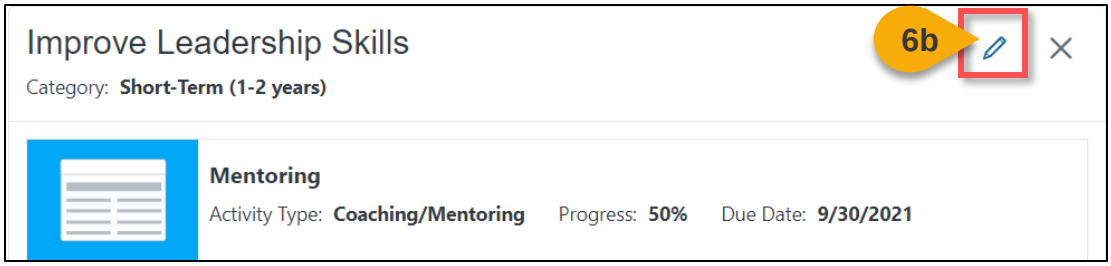
Update IDP (Cont. 2)

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.

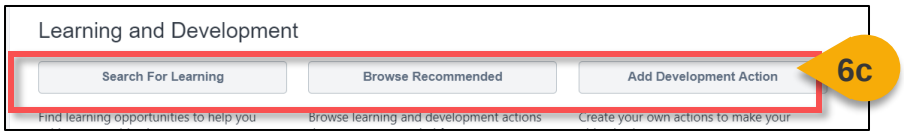
Step 6a: Select the dropdown icon **Edit** option next to the plan with the Objective you want to update.



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

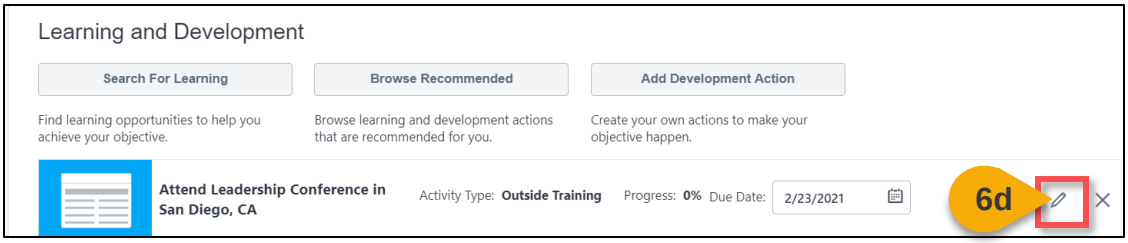


Step 6c: To add training or Development Actions, choose from the options within **Learning and Development.**

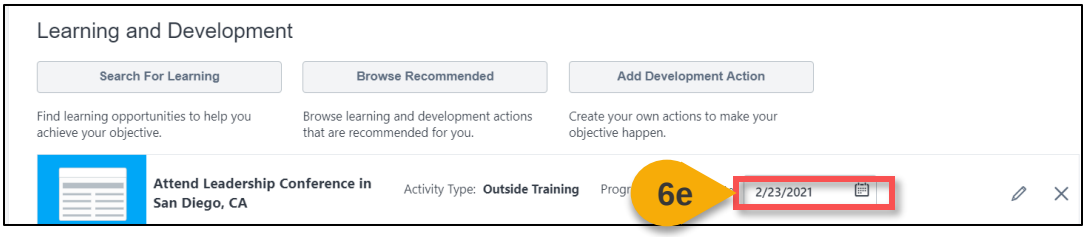


Update IDP (Cont. 3)

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.

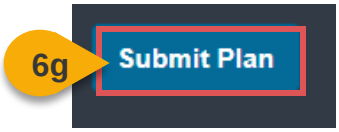


Step 6e: For training courses that are NOT Development Actions, you may update the due date by clicking on the **Due Date field** or delete it by clicking on the **X icon** next to it. Training course completions will be updated automatically as you complete these training courses on your transcript.



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.

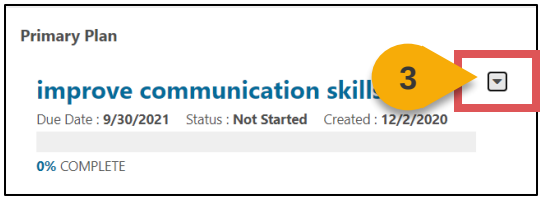


Cancel IDP

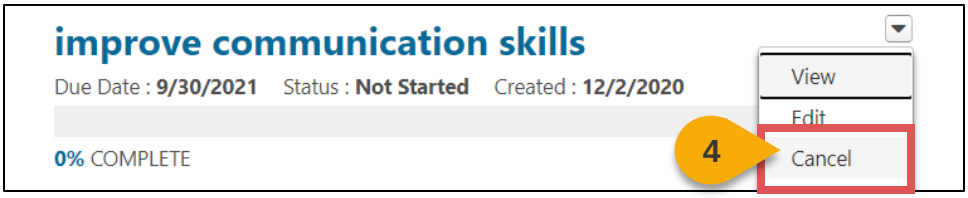
When you want to cancel an IDP…

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

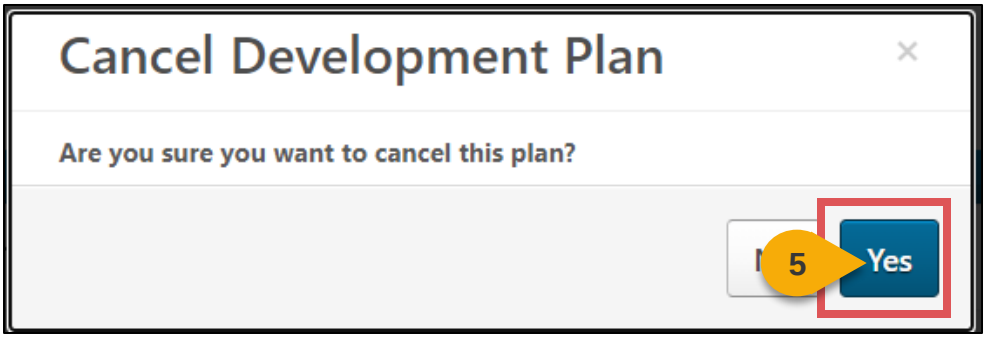
Step 3: Click the **dropdown arrow** next to the plan you would like to cancel.



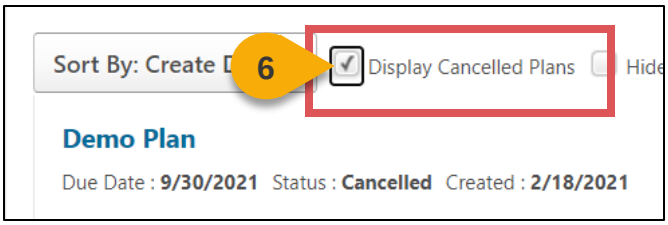
Step 4: Select **Cancel** from the dropdown menu.



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.

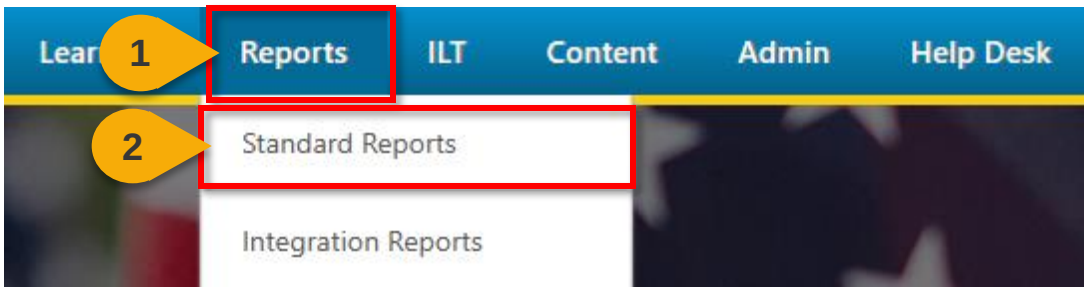


Reports

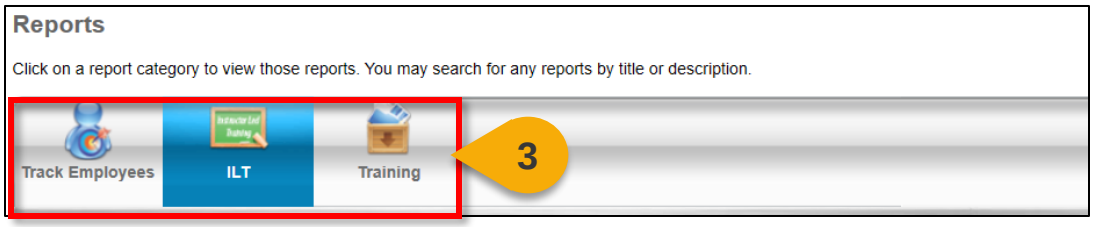
View Standard Reports

When you want to view Standard Reports…

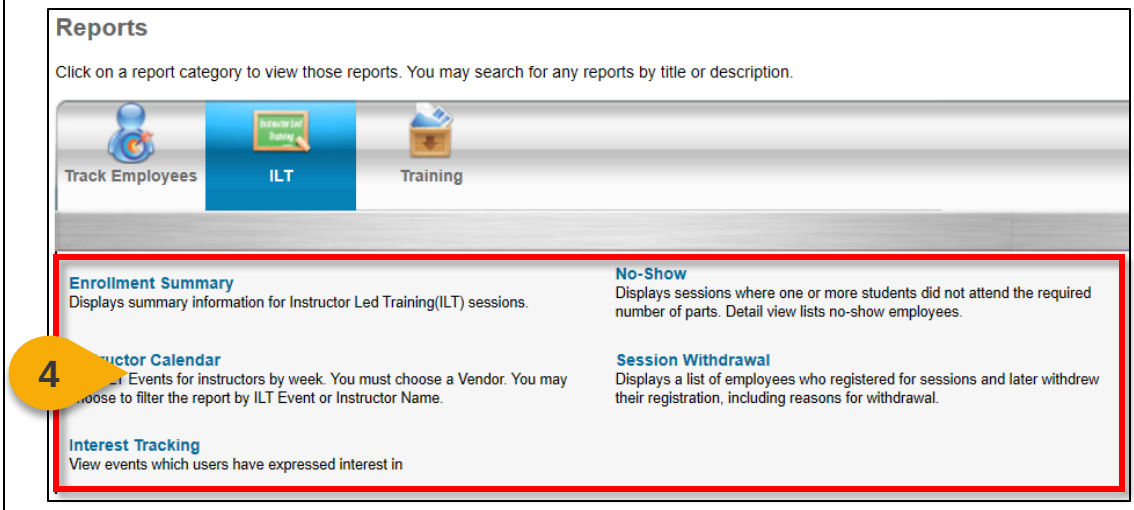
Steps 1 & 2: Hover over the **Reports tab** and then click **Standard Reports**.



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

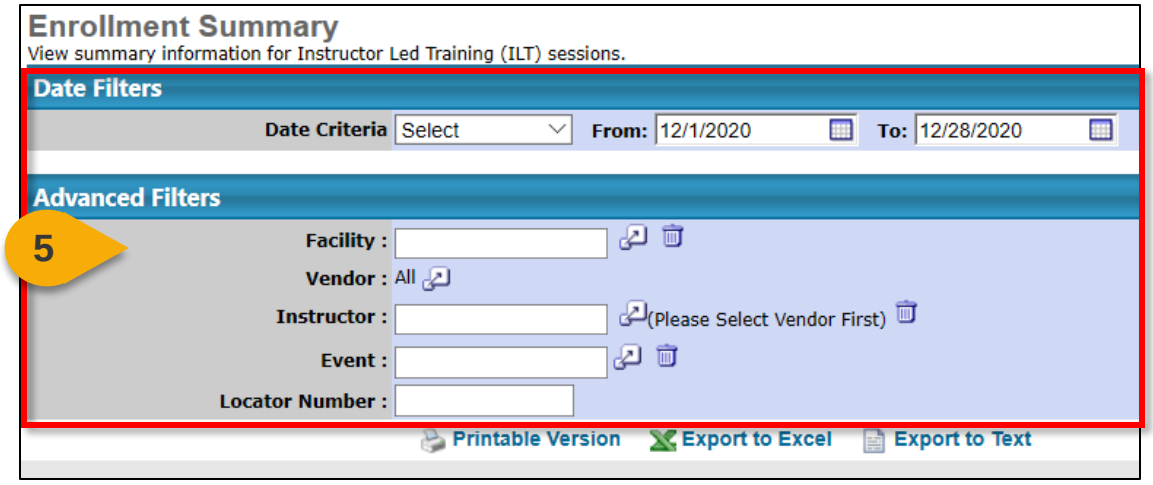


Step 4: Select the type of report you would like to view by clicking on the **name of the report**.

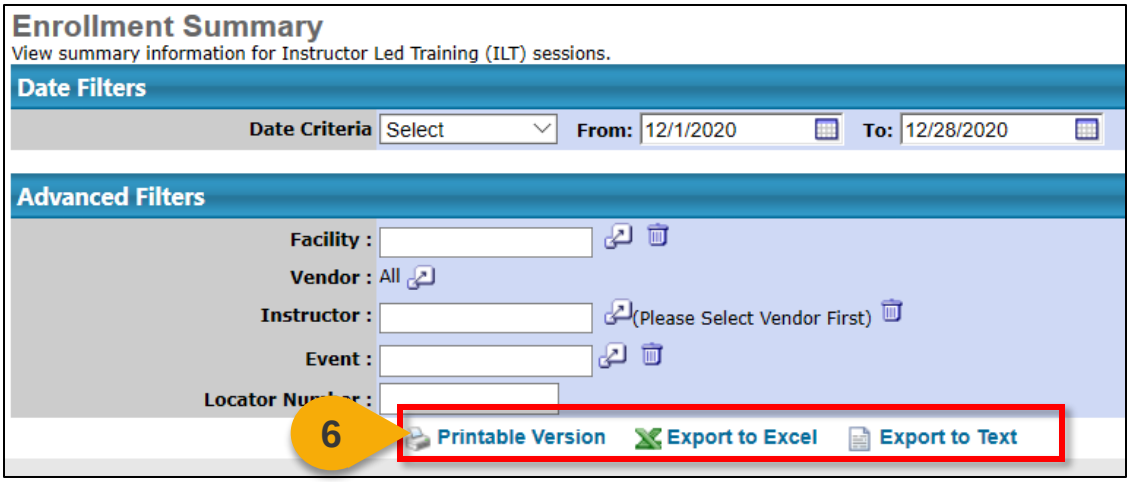


View Standard Reports (Cont.1)

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.

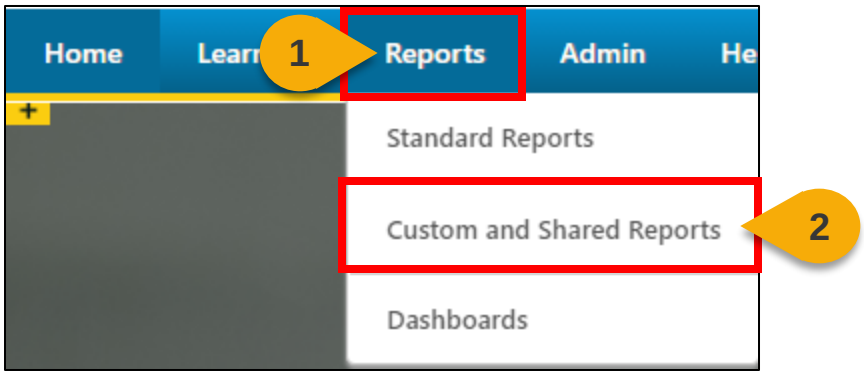


Note: Click "Yes" to open the Excel option after the download has completed.

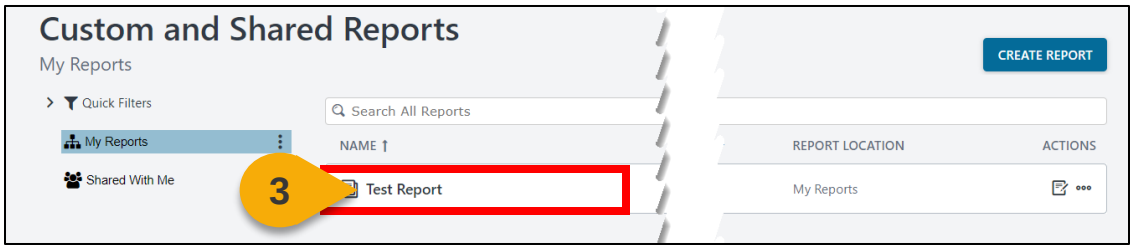
View Custom Reports

When you want view custom or shared reports…

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

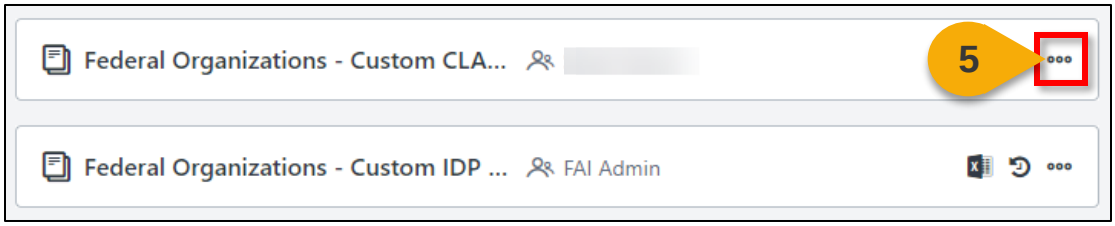


Step 3: You will arrive at the Custom and Shared Reports page. Here you will see all custom reports that you have created. Click on the **title** of the report to view it.

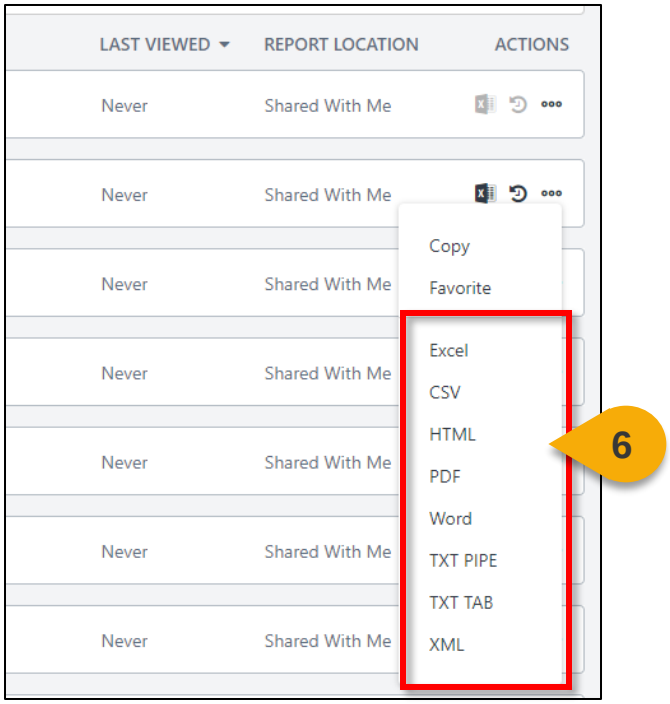


View Custom Reports (Cont.1)

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



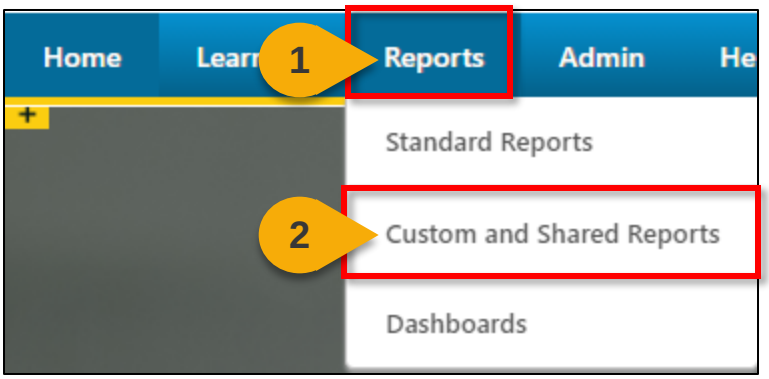
Step 6: Click the **file format** you wish to download. It will download to your computer.



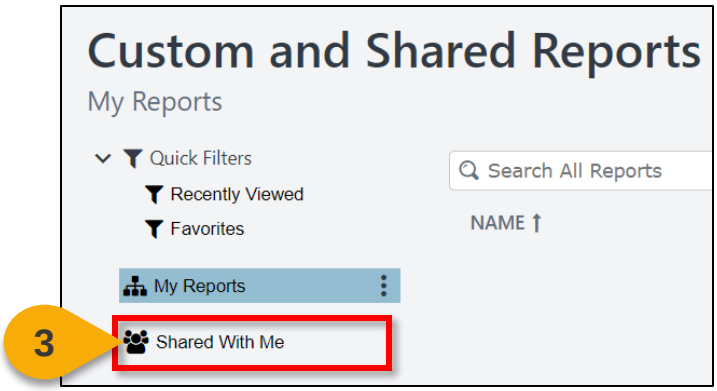
Filter and Download Custom Reports

When you want to filter and download a report…

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



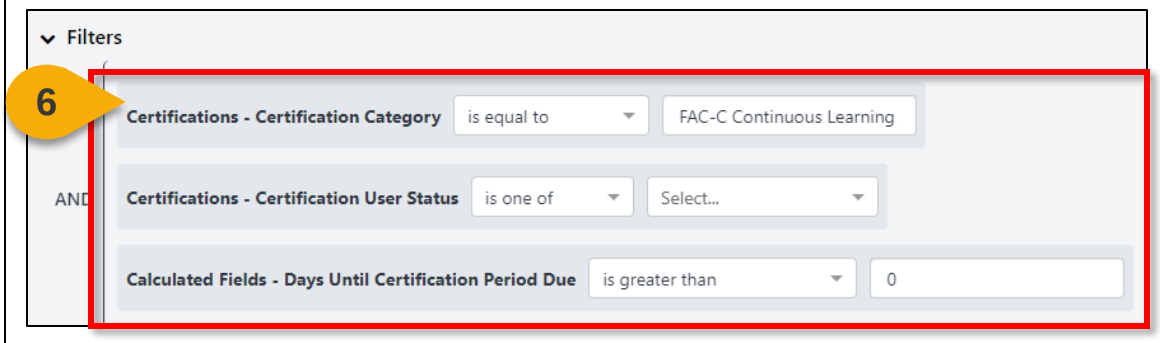
Step 3: On the left-hand side of the screen, click **Shared With Me** to see reports that have been shared with you.



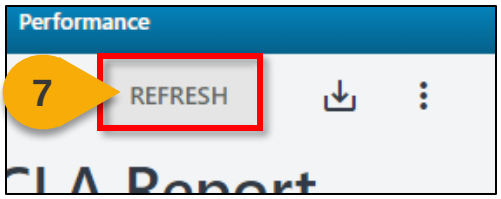
Step 4: Click the **Report Name** you want to view to update the report filters.

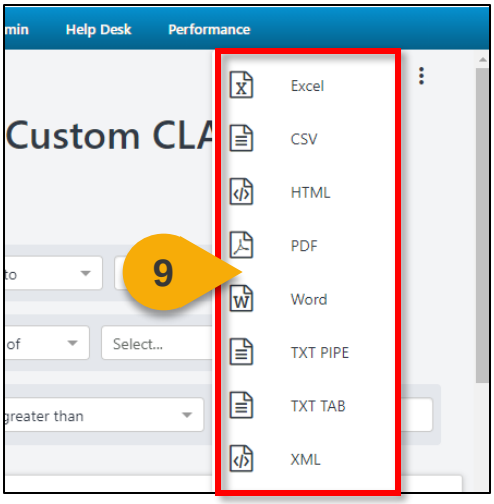
Filter and Download Custom Reports (Cont. 1)

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



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



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

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