Manager Task Aids

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

https://www.fai.gov/
FAI@mail.mil
# Table of Contents

<table>
<thead>
<tr>
<th>User Management</th>
<th>Page #</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>View Your Team</strong></td>
<td>p.4</td>
</tr>
<tr>
<td>Training Assignment</td>
<td></td>
</tr>
<tr>
<td><strong>Assign Training</strong></td>
<td>p.6</td>
</tr>
<tr>
<td><strong>Assign Certifications</strong></td>
<td>p.9</td>
</tr>
<tr>
<td>Approvals</td>
<td></td>
</tr>
<tr>
<td><strong>Approve/Deny/Return a Warrant Application</strong></td>
<td>p.12</td>
</tr>
<tr>
<td><strong>Approve IDPs</strong></td>
<td>p.14</td>
</tr>
<tr>
<td>Reports</td>
<td></td>
</tr>
<tr>
<td><strong>View Standard Reports</strong></td>
<td>p.17</td>
</tr>
<tr>
<td>Additional Resources</td>
<td></td>
</tr>
<tr>
<td><strong>Additional Resources</strong></td>
<td>p.20</td>
</tr>
</tbody>
</table>
User Management
View Your Team

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

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

Step 3: Click on Documents and Plans.

Step 4: Click on View Team.

Step 5: A popup window will show your direct reports. Search for specific employees by using the Search bar.
Training Assignment
Assign Training

When you want to assign a training to your subordinates...

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

1. Search

**Step 2:** Select the training you wish to assign by clicking on the training title.

2. FCL-CM-2500 Category Management 101 Pt 2

**Step 3:** Click Assign.

3. Assign

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

4. Due Date

Back to Table of Contents
Assign Training (Cont. 1)

**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.
Step 8: Click the **Submit button** at the bottom of the page. The training will be assigned to the User within a few minutes.
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** to assign the certification.
Approvals
Approve/Deny/Return a Warrant Application

When you want to approve, deny, or return a Warrant Application ...

Some Agencies have chosen to have supervisors as part of the Warrant Application approval process. If you are part of this process, you will receive an email indicating that you have a Warrant Application in your approval queue.

Steps 1 & 2: Navigate to Home > Universal Profile.

Step 3: Click the Actions tab to view the dropdown.

Step 4: Click the Requests to view the requests available for approval.
Approve/Deny/Return a Warrant Application (Cont. 1)

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

Step 6: Review the information. Enter comments in the **Approval Comments (optional)** field.

Step 7: At the bottom of the form, click **Deny, Deny and Return, or Approve** as appropriate. If approved, the form will go to the next approval level.
Approve IDPs

When you want to approve or deny your subordinate’s IDP...

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

![Image showing Performance tab and Development Plans section]

**Step 3:** Select **View Team**.

![Image showing View Team button selected]

**Step 4:** Click on the **User** whose IDP you would like to approve.

![Image showing user list with Sally MacLeod highlighted]

**Step 5:** Select the **plan title** to view more details on the IDP.

![Image showing IDP details with Demo Plan highlighted]

Back to Table of Contents
Steps 6: Review the plan and click **Approve** to approve the IDP.
Reports

Standard Reports Available to Managers:
• Employee Transcripts – Manager Approver Access
• ILT No Show Report – Manager Version
• ILT Session Withdrawal Report – Manager Version
• Track Employees – Employee Records
• Track Employees – Training Progress Pie Chart
• Past Training Requests Report
• Track Employees – Past Due Report
• Track Employees – Training Status Summary Report
• Online Training Status Report
• Training – Curriculum Details Report
• SCORM 2004 Course Progress Chart Report
• Transcript Status Report
View Standard Reports

When you want to view Standard Reports...

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

- Step 3: Choose the Report Category. The Report Categories available will vary depending on your roles.

- Step 4: Select the type of report you would like to view by clicking on the name of the report. The reports available to you will vary depending on your roles. See the previous page of this task aid for the minimum reports you should see for this role.
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. Visit https://help.csod.com/help/csod_0/Content/Reporting/Standard_Reports/Standard_Reports_Overview.htm?Highlight=standard%20report for more information on specific standard reports.

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

Note: You may receive an error message when trying to open the spreadsheet. If this happens, click “Yes” to open the file.
Additional Resources
# Additional Resources

<table>
<thead>
<tr>
<th>Support Area</th>
<th>Support Provided</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defense Acquisition University (DAU) Help Desk</td>
<td>• FAI CSOD System Questions and Issues</td>
<td>Email: <a href="mailto:DAUHelp@dau.edu">DAUHelp@dau.edu</a> Phone: (703) 805-3459, X1</td>
</tr>
<tr>
<td></td>
<td>• FAI CSOD System Errors and Troubleshooting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Password Issues and Resets</td>
<td></td>
</tr>
<tr>
<td>Your Agency's Acquisition Career Manager (ACM)</td>
<td>• Agency-specific Acquisition Training, Certification, and Continuous Learning (CL) Requirements</td>
<td><a href="https://www.fai.gov/humancapital/acquisition-career-manager-acm">https://www.fai.gov/humancapital/acquisition-career-manager-acm</a></td>
</tr>
<tr>
<td></td>
<td>• Agency-specific Acquisition Policies and Procedures</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Career Development</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Training and Development Opportunities</td>
<td></td>
</tr>
<tr>
<td>FAI CSOD Training Materials and Online Resources</td>
<td>• Task Aids for FAI CSOD Roles</td>
<td><a href="https://dau.csod.com/catalog/CustomPage.aspx?id=221000511">https://dau.csod.com/catalog/CustomPage.aspx?id=221000511</a></td>
</tr>
<tr>
<td></td>
<td>• Other Guidance for Performing Tasks in FAI CSOD</td>
<td></td>
</tr>
<tr>
<td>FAI Website FAQs</td>
<td>• FAI CSOD Migration</td>
<td><a href="https://www.fai.gov/page/migration-faitas-fai-cornerstone-ondemand-csod-faqs">https://www.fai.gov/page/migration-faitas-fai-cornerstone-ondemand-csod-faqs</a></td>
</tr>
<tr>
<td></td>
<td>• Acquisition Training</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Federal Acquisition Certifications (FAC-C, FAC-COR, FAC-P/PM)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• More!</td>
<td></td>
</tr>
<tr>
<td>FAI Staff</td>
<td>All other questions</td>
<td><a href="mailto:faicsod@gsa.gov">faicsod@gsa.gov</a></td>
</tr>
</tbody>
</table>