FEDERAL ACQUISITION INSTITUTE

Registrar Task Aids

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

https://www.fai.gov/

FAI@mail.mil

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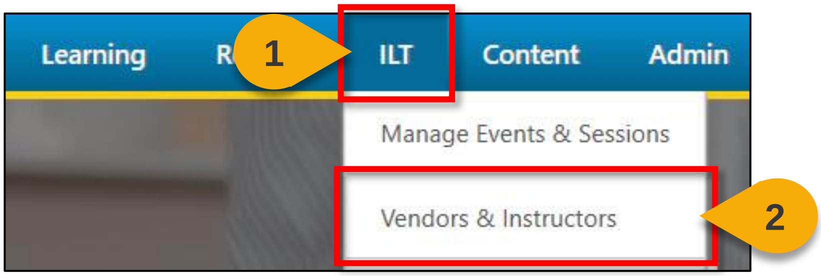
Instructors & Facilities

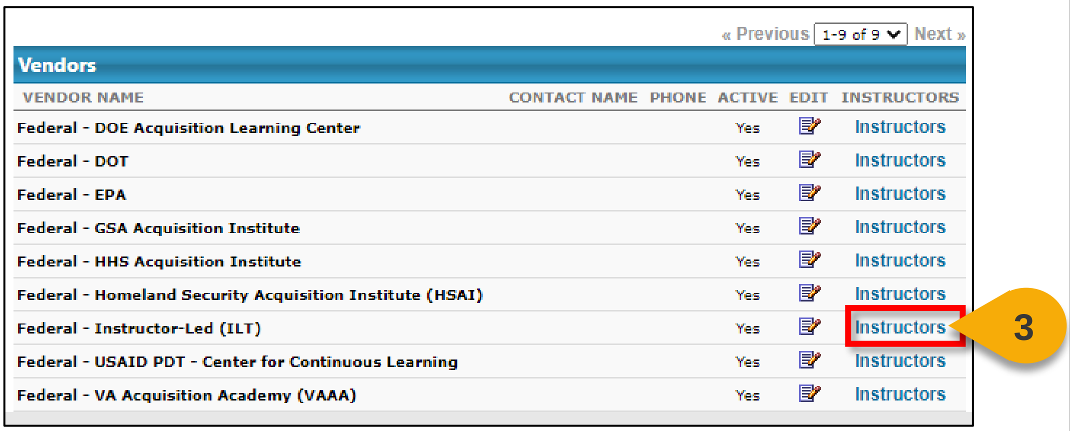
View Instructors for Your Schoolhouse

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.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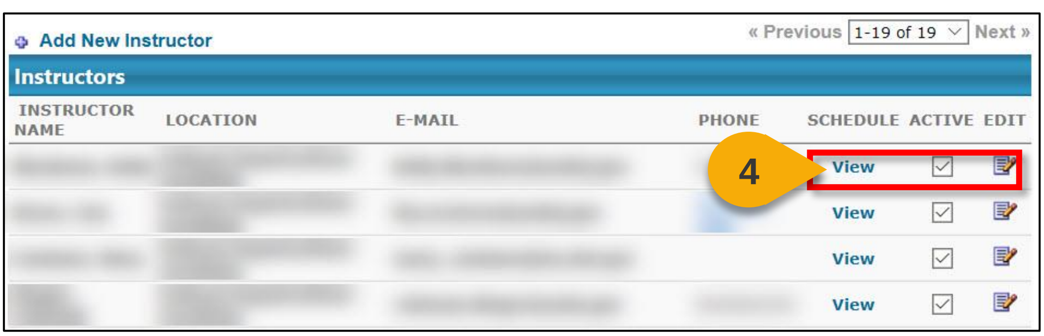
Vendors

VENDOR NAME	CONTACT NAME	PHONE	ACTIVE	EDIT	INSTRUCTORS
Federal - DOE Acquisition Learning Center			Yes		Instructors
Federal - DOT			Yes		Instructors
Federal - EPA			Yes		Instructors
Federal - GSA Acquisition Institute			Yes		Instructors
Federal - HHS Acquisition Institute			Yes		Instructors
Federal - Homeland Security Acquisition Institute (HSAI)			Yes		Instructors
Federal - Instructor-Led (ILT)			Yes		Instructors
Federal - USAID PDT - Center for Continuous Learning			Yes		Instructors
Federal - VA Acquisition Academy (VAAA)			Yes		Instructors

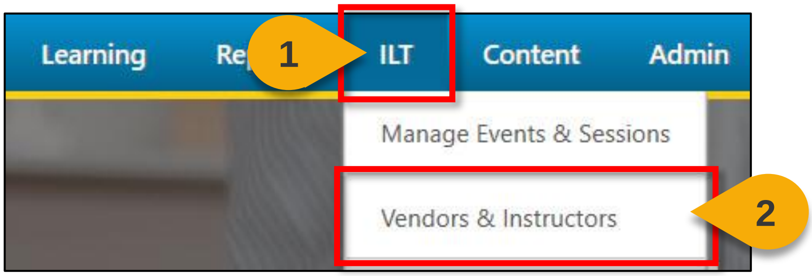
Step 4: You will then be directed to the **Instructors page**. From here, you can take action to **view their schedule, inactivate the Instructor,** or **edit their information**.



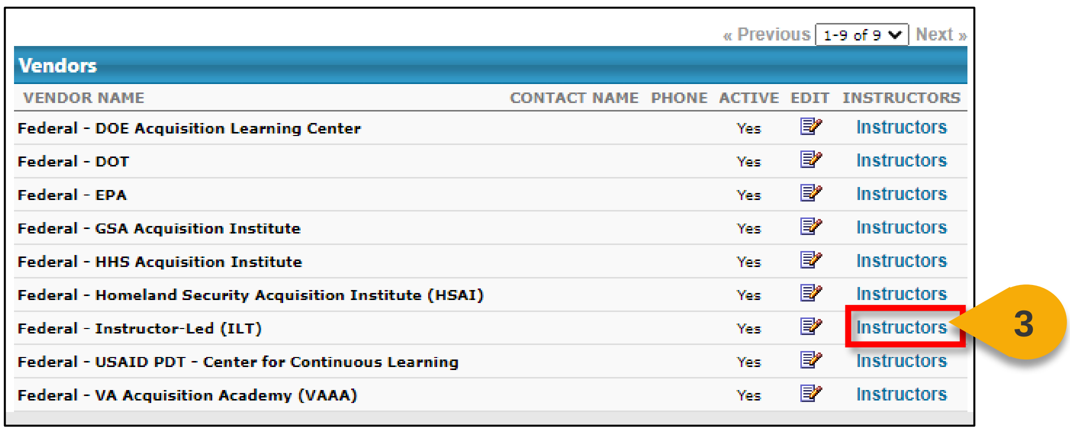
Add CSOD User as an Instructor

When you want to add an Instructor to your Schoolhouse…

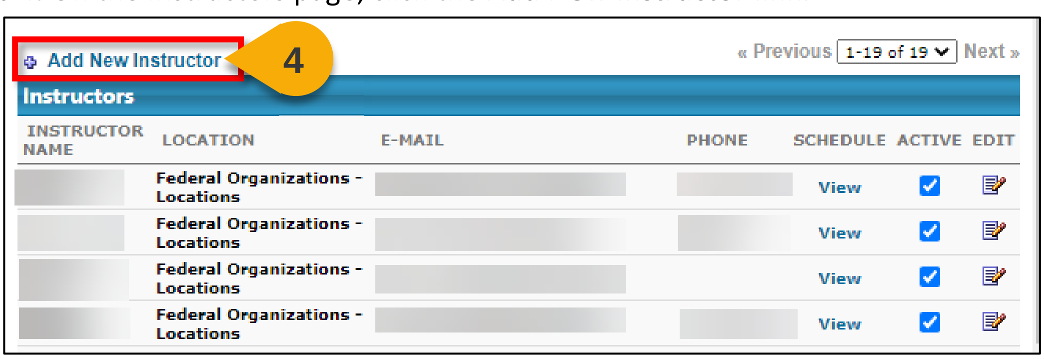
Steps 1 & 2: Hover over the **ILT tab**, then select **Vendors & Instructors**.



Step 3: To the right of your Schoolhouse, click the **Instructors link**.



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



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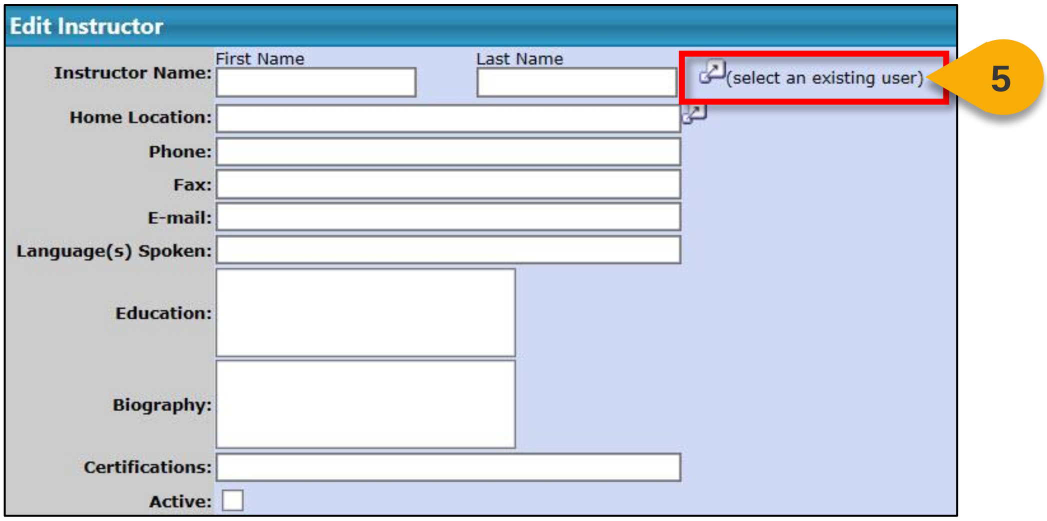
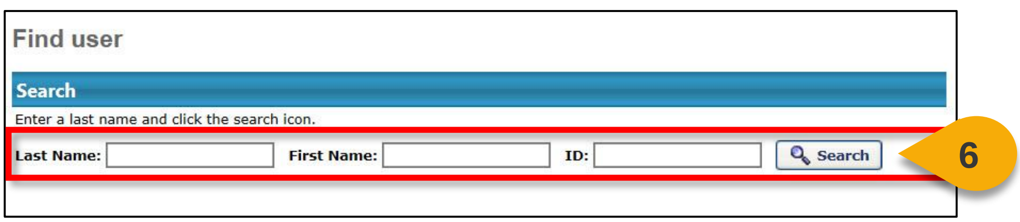
Add CSOD User as an Instructor (Cont. 1)

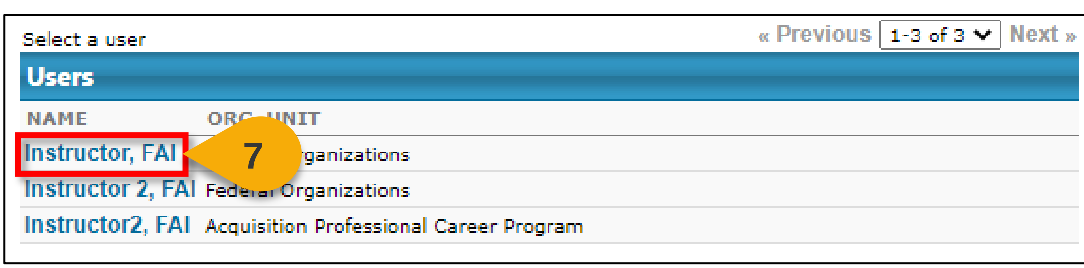
Step 5: Click on the **(select an existing User) pop-out** next to the Last Name field**.**



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.



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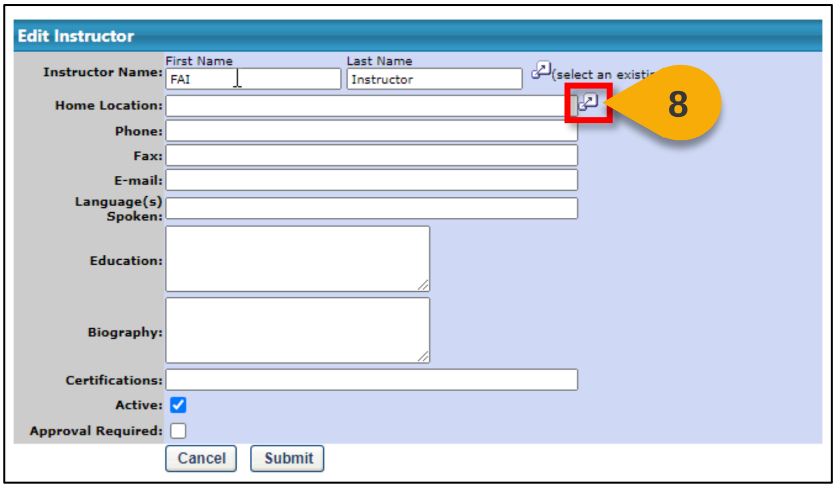
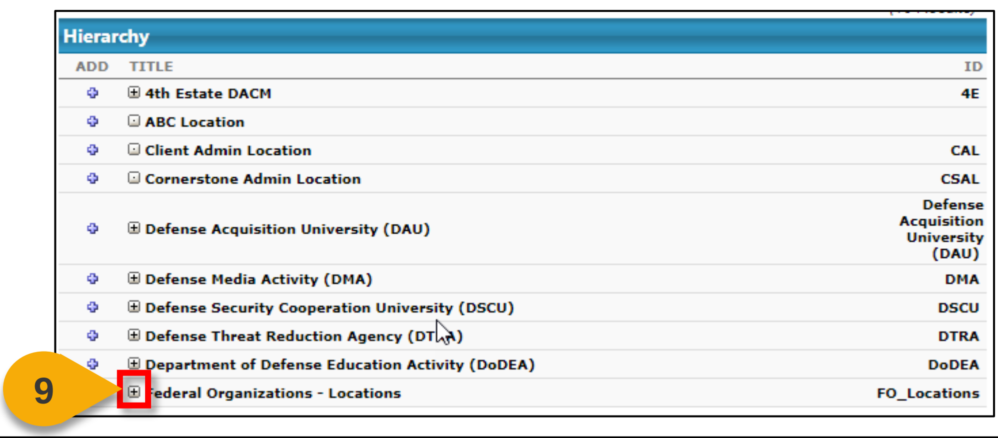
Add CSOD User as an Instructor (Cont. 2)

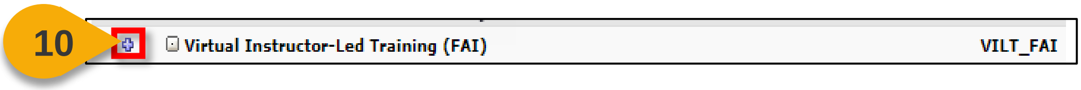
Step 8: The User's name will appear in the Edit Instructor panel of the Add Instructor page. Click the **pop-out** next to Home Location to choose a location the Instructor will teach at.



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.



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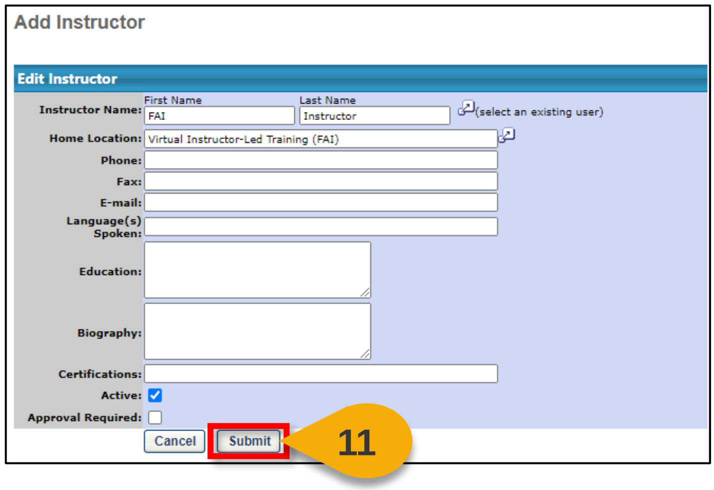
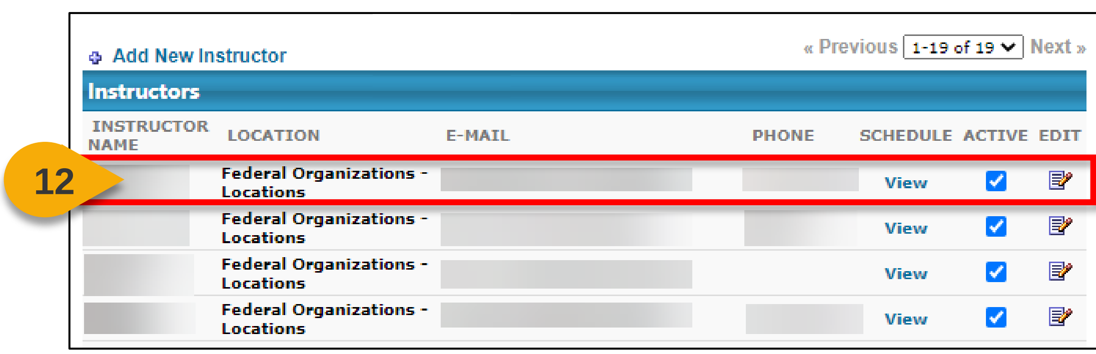
Add CSOD User as an Instructor (Cont. 3)

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.



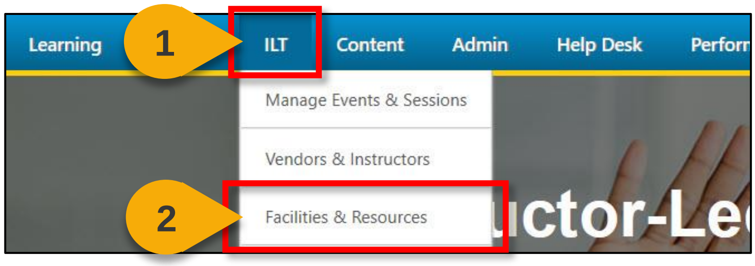
Step 12: You will be returned to the Instructor list for your location. You will be able to view and edit the Instructor you added.



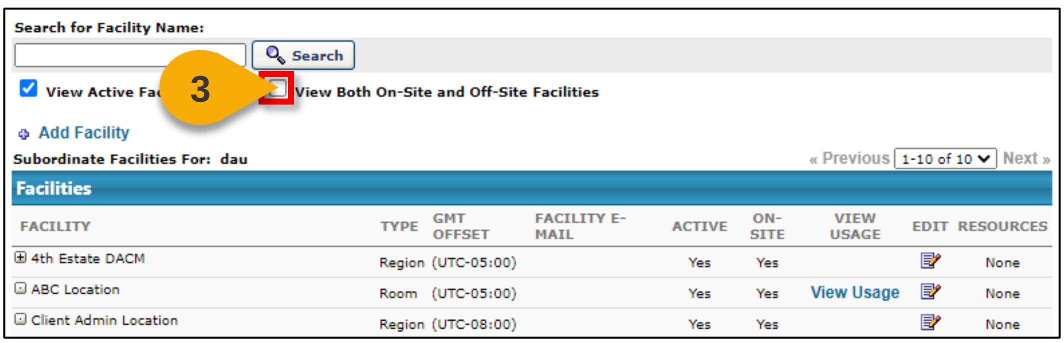
View Facilities for Your Schoolhouse

When you want to view available Facilities…

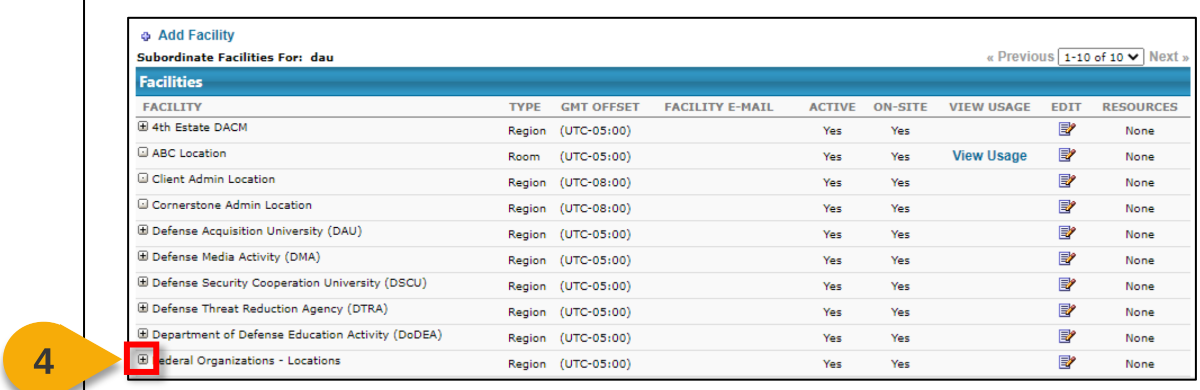
Steps 1 & 2: Hover over the **ILT tab**, then select **Facilities & Resources.**



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

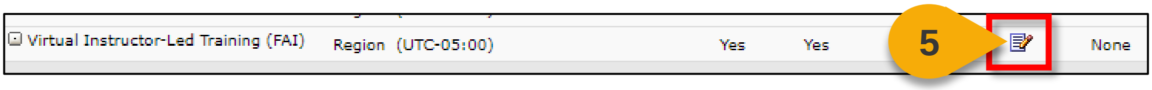


Step 4: On the Facilities and Resources page, click the **gray +** to drill down into Federal Organizations – Locations to the Facility you wish to view.

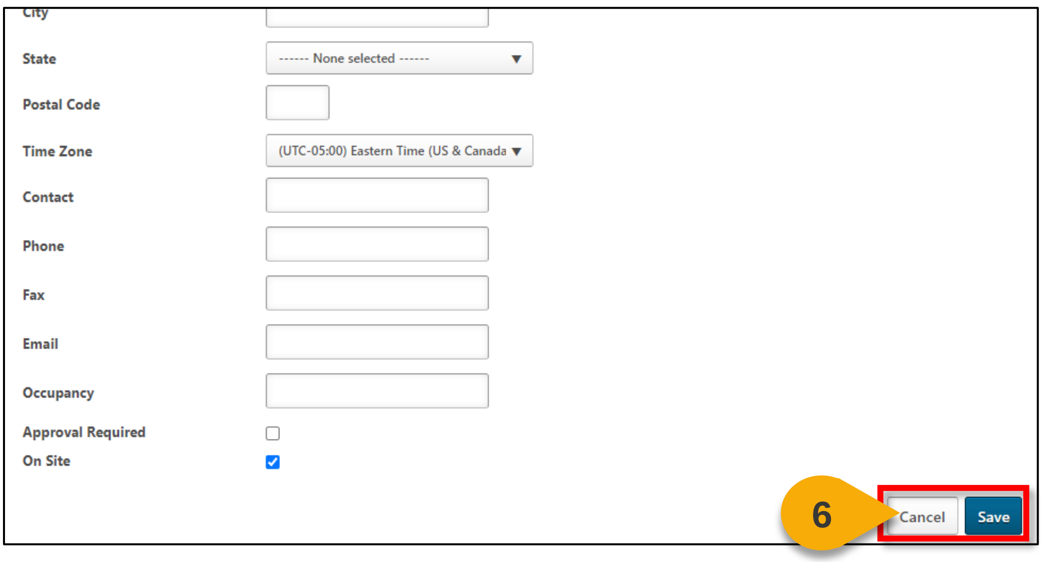


View Facilities for Your Schoolhouse (Cont.1)

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.

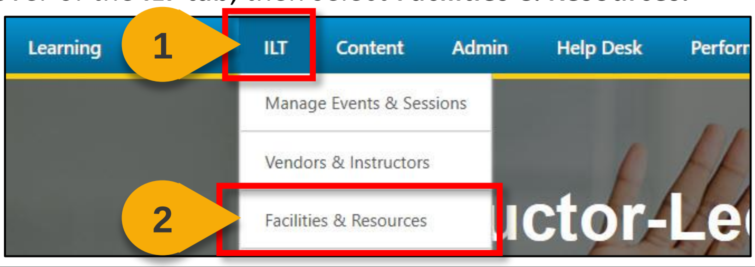


Add Facilities for Your Schoolhouse

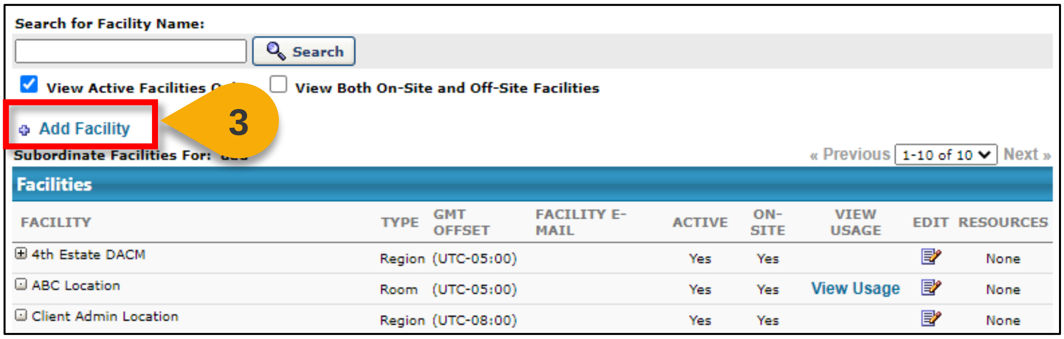
When you want to add a Facility…

Use the instructions below to add a single location at a time. If your Agency has many locations you'd like to add, please reach out to faicsod@gsa.gov for assistance with a facility load.

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**.

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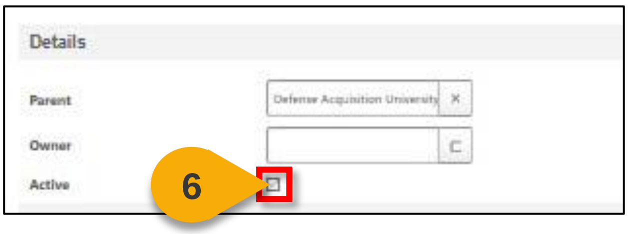
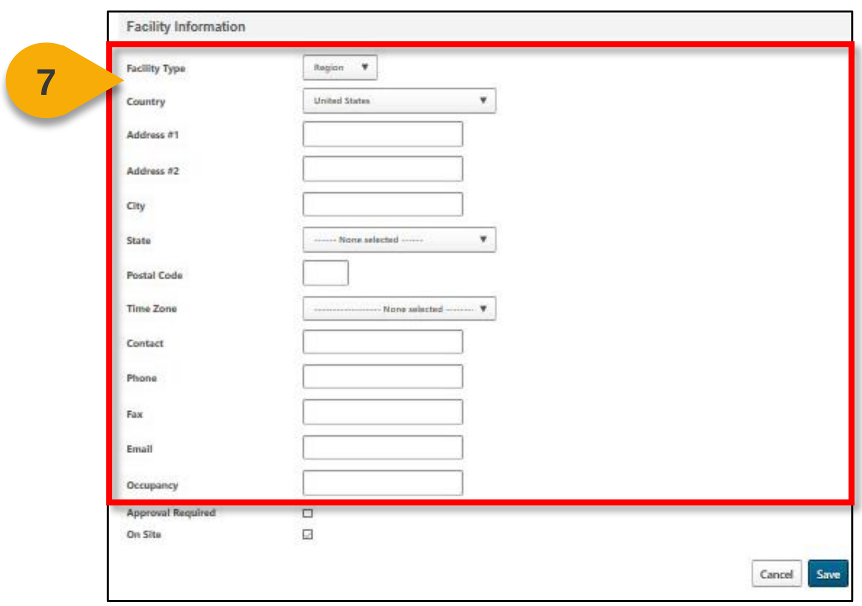
Add Facilities for Your Schoolhouse (Cont. 1)

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.

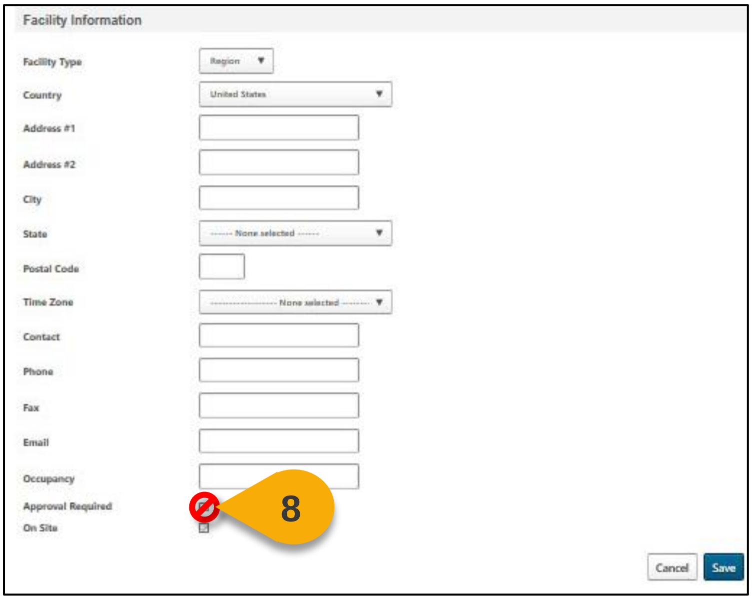


Step 7: In the **Facility Information section**, enter as many details as you can to help students find this Facility/Location. **Note:** The only required field is Time Zone. If you decide to add Occupancy, you won't be allowed to add more registrations than the Occupancy number when creating a Session.

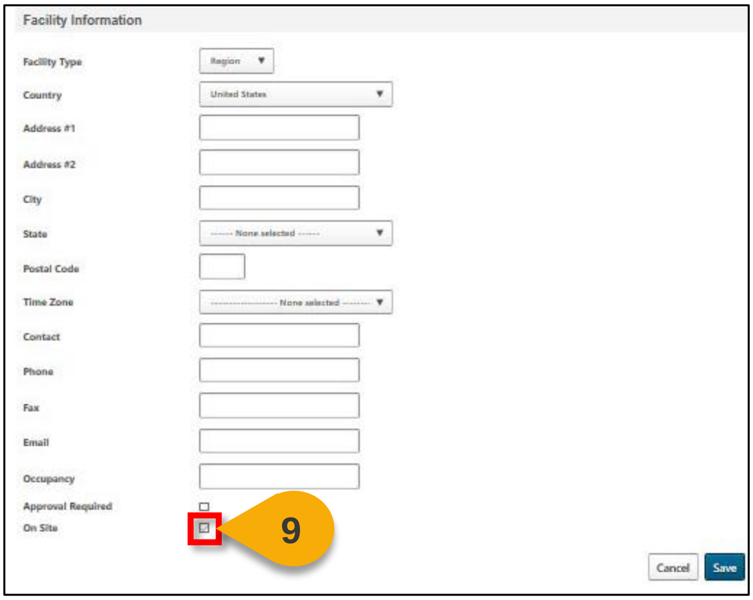


Add Facilities for Your Schoolhouse (Cont. 2)

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

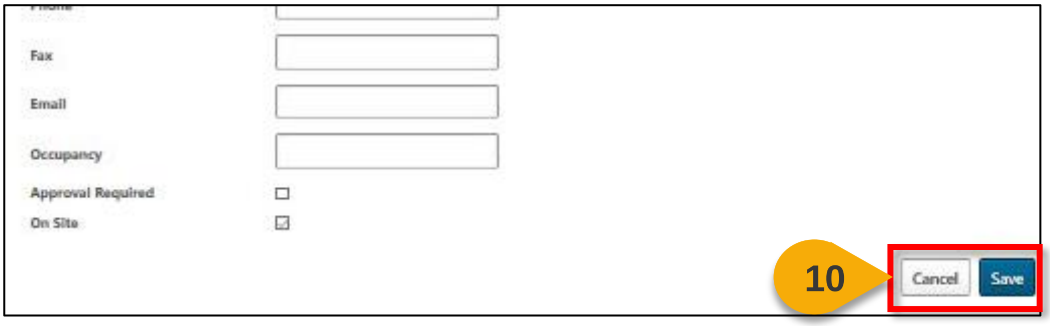


Step 9: Check the **On-Site box** if this is a government Facility/Location. Otherwise, leave this box unchecked.

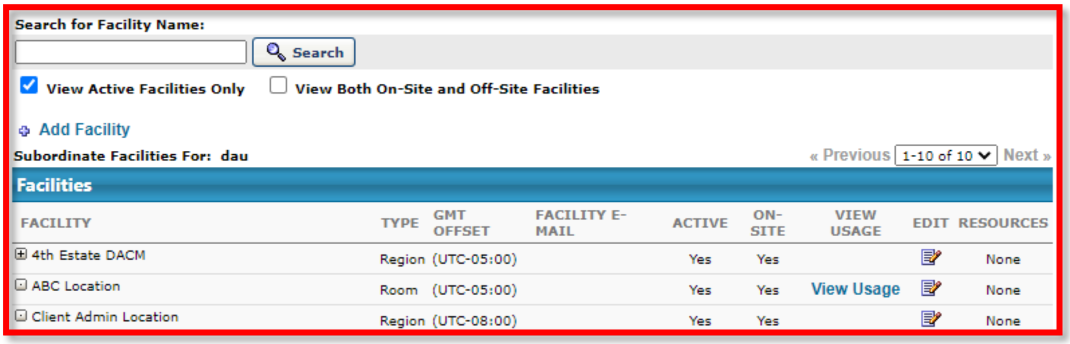


Add Facilities for Your Schoolhouse (Cont. 3)

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.



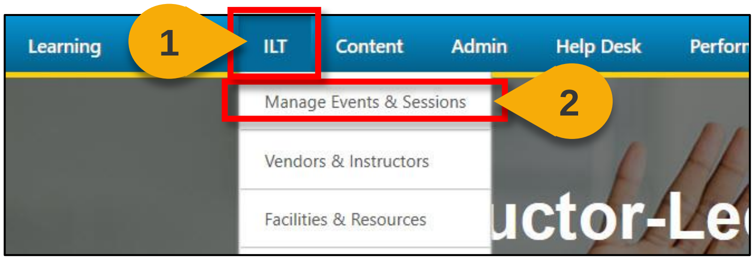
Event & Session Management

Create Event

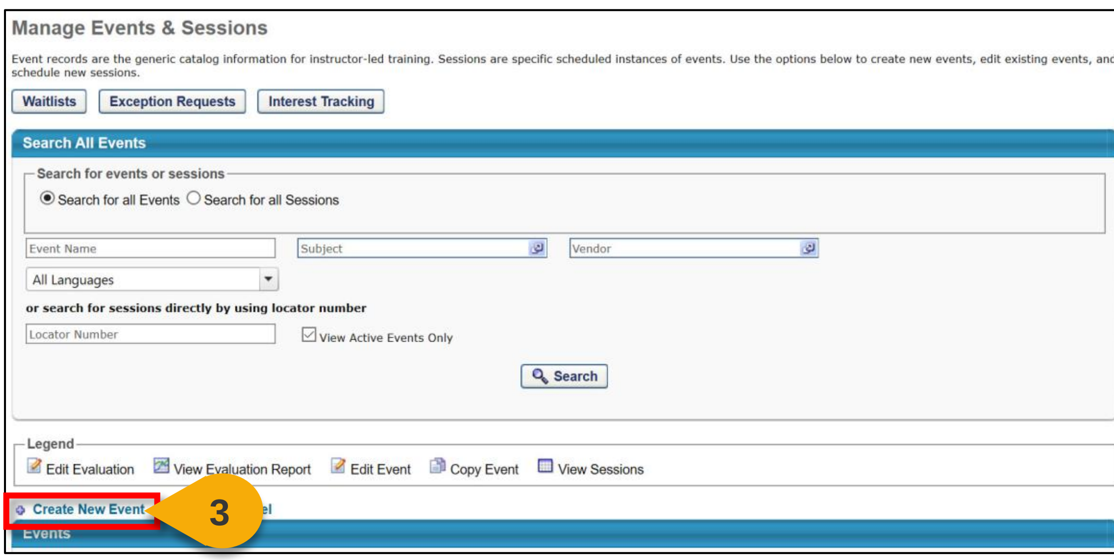
When you want to create a new Event…

Please contact FAI at faicsod@gsa.gov prior to creating any Events in CSOD.

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

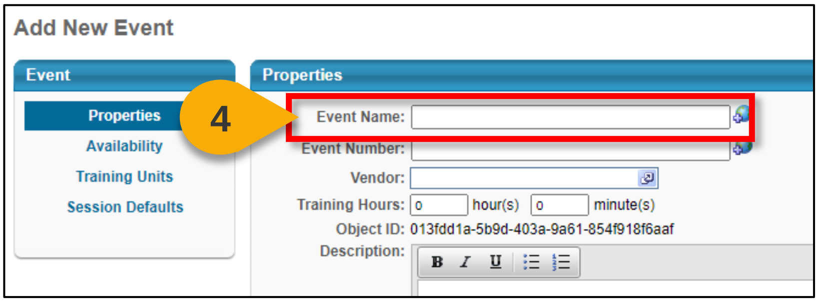


Step 3: Select **Create New Event.**

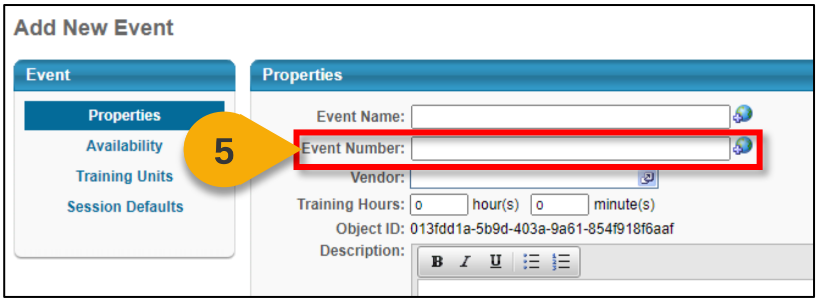


Create Event (Cont. 1)

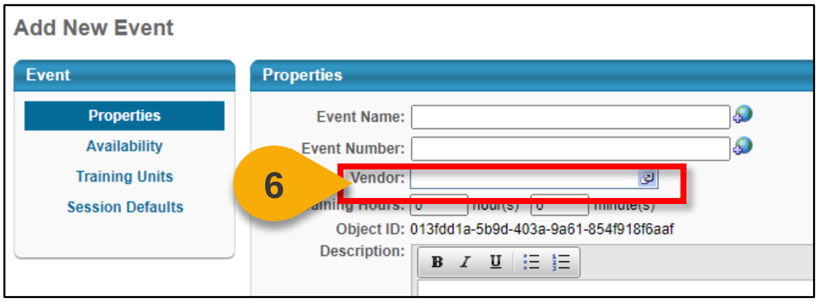
Step 4: In the Properties tab, add the **Event Name**. The Event Name is the name of the course, such as ACQ 265 (FED): Mission Focused Services Acquisition.



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.



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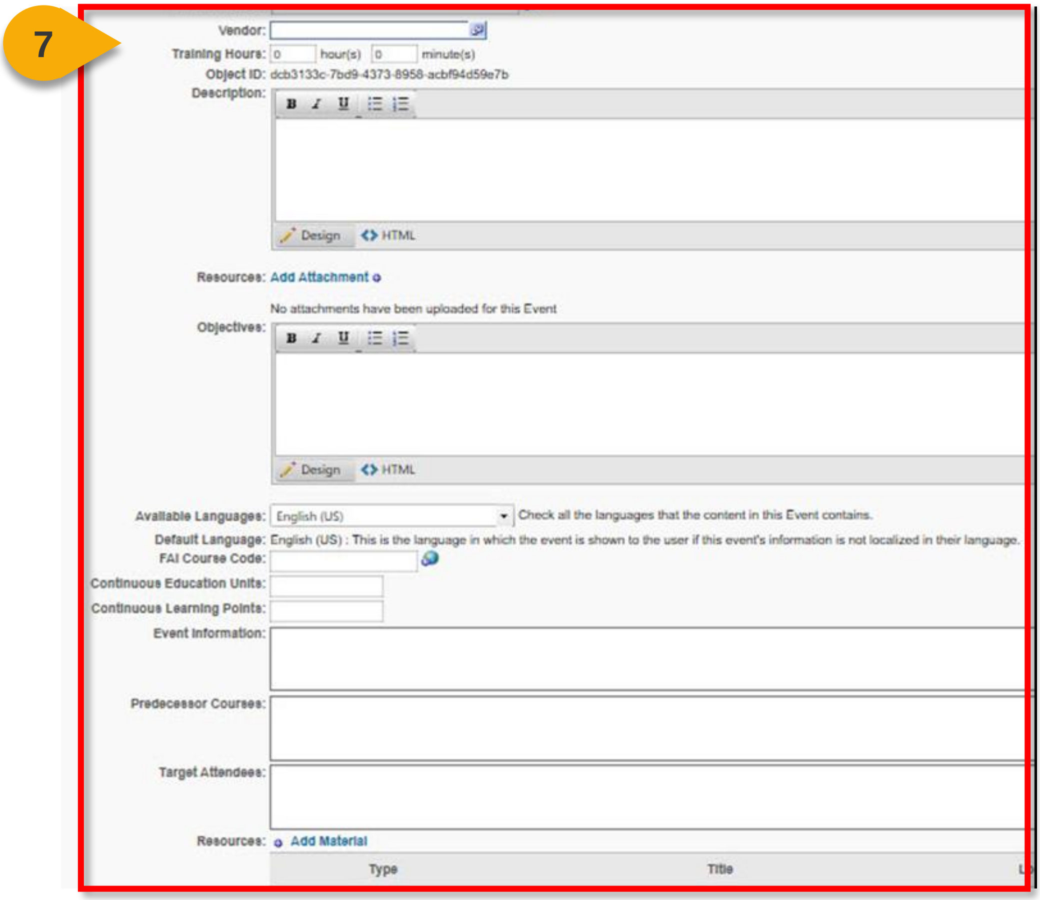
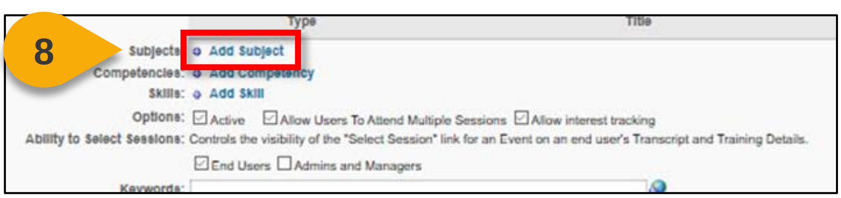
Create Event (Cont. 2)

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.



FAI Course Code: Enter the Course ID (Ex. ABC 123 (FED))

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



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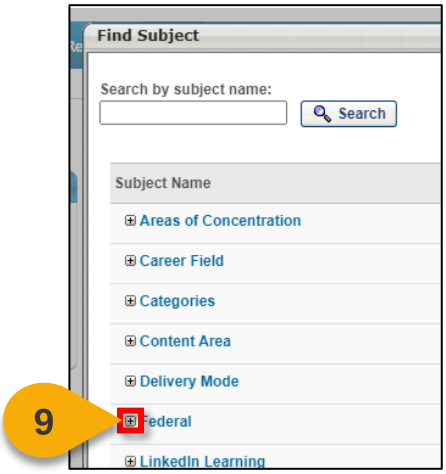
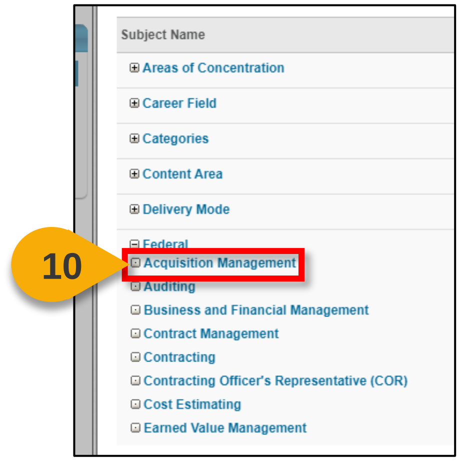
Create Event (Cont. 3)

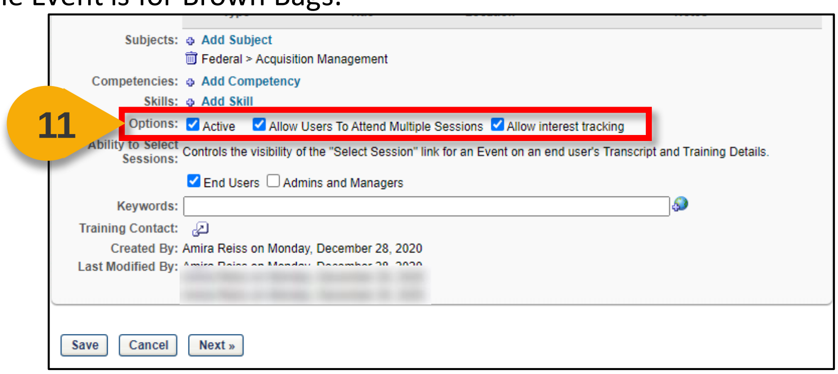
Step 9: Use the **gray +** to drill into Federal Subjects.



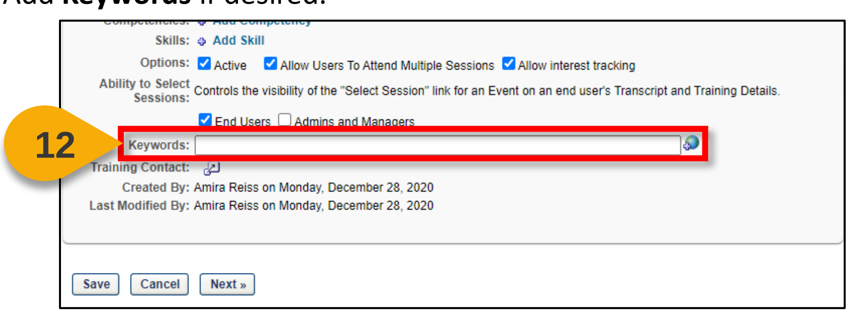
Step 10: Use the **blue link** to select the applicable Subject(s).



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.



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



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Create Event (Cont. 4)

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

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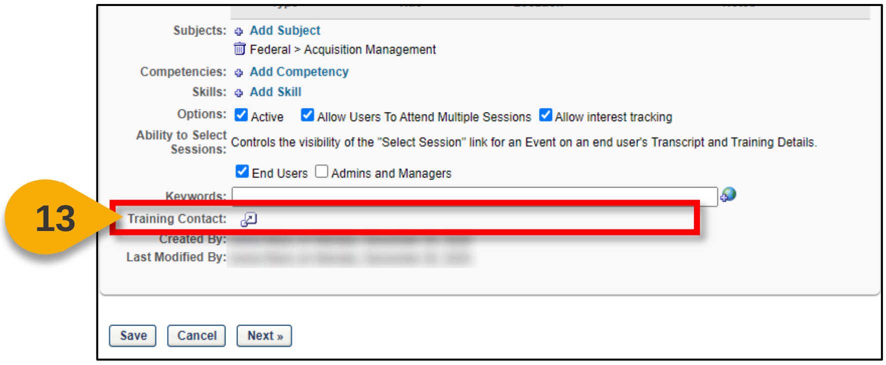
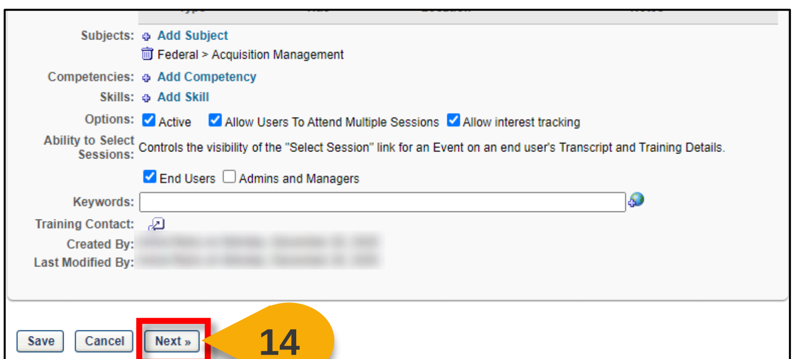
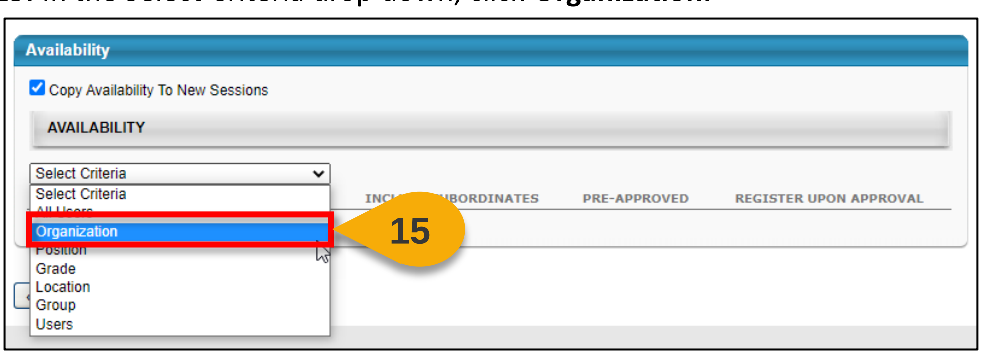


Step 14: Click **Next** to save this information and move to the Availability tab.



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



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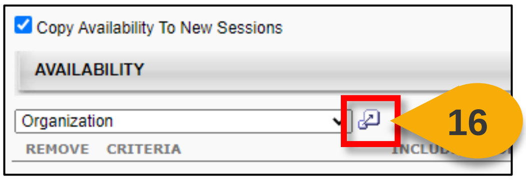
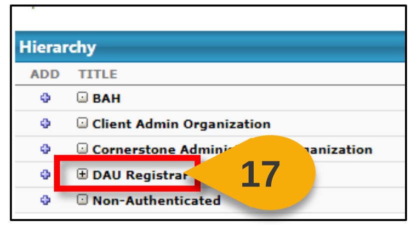
Create Event (Cont. 5)

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

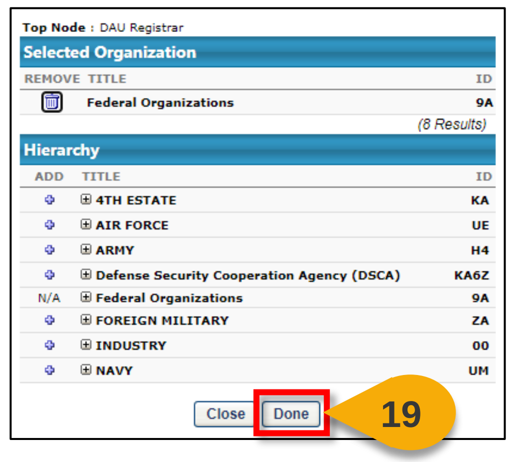


Step 17: Click the **gray +** next to DAU Registrar to drill down within the Organizations.

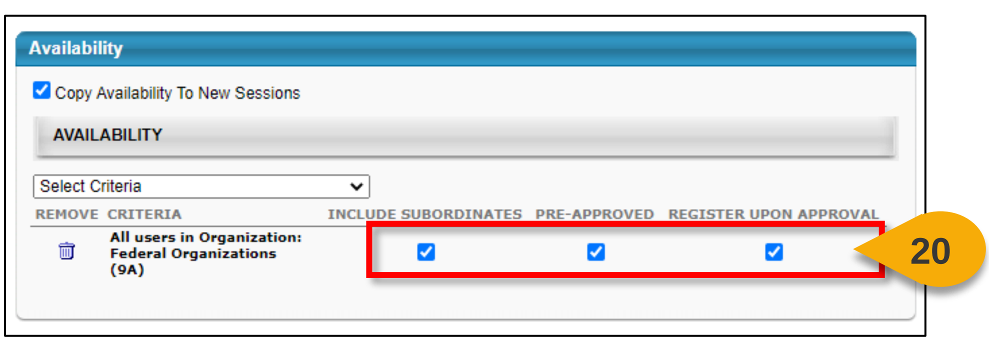


Step 18: Click the **blue +** next to Federal Organizations to make this event open to all Users within the Federal Organizations hierarchy or continue to drill down. **Note:** We will be able to set more restrictive availability when creating sessions.

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

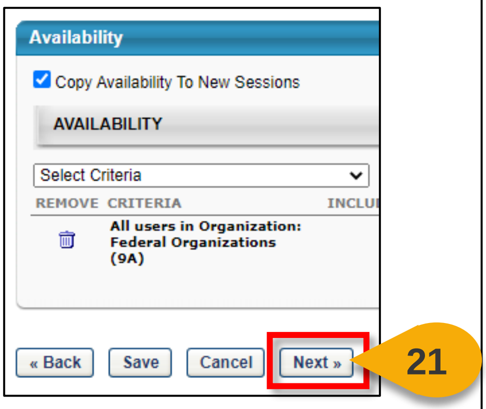


Step 20: Check the **Include Subordinates, Pre-Approved, and Register Upon Approval** boxes. These options will ensure that all Federal Organizations Users will see the Event, that Users will not go through the workflow unless dictated in the Session, and that Users will not need to register themselves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

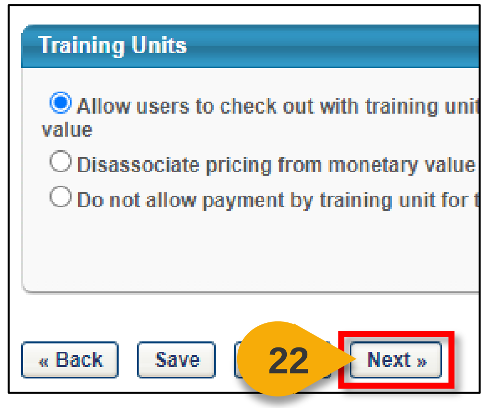


Create Event (Cont. 6)

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

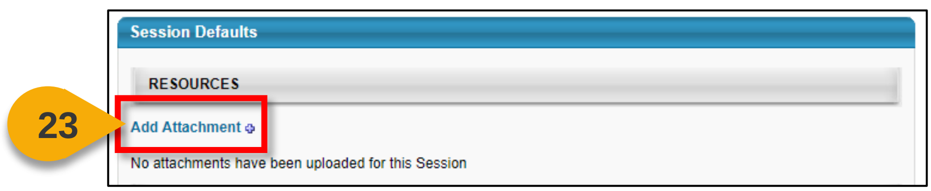


Step 22: You will not use the Training Units tab. Click **Next** to advance to the Session Defaults tab.

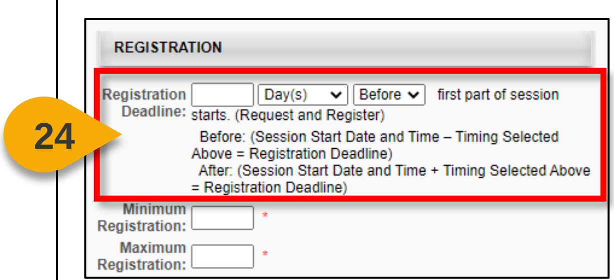


Step 23: Any information you enter in the Session Defaults will appear for all Sessions you create. You can enter this information now if it is standard text for all Sessions or enter the information when creating a specific Session. You can still edit the information in the Session.

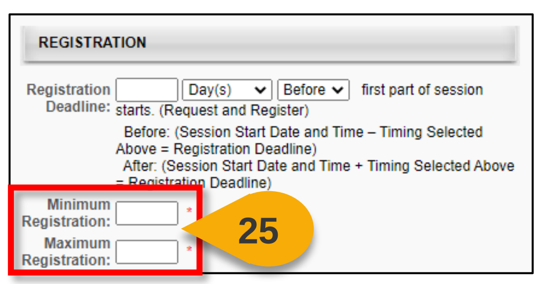
In the **Resources** section, add any **attachments**, if applicable.



Step 24: In the Registration section, set the **Registration Deadline**. This value is the amount of time before the start date where you will cut off registration of new students.

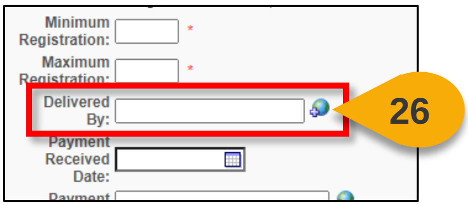


Step 25: Set the **Minimum Registration** and **Maximum Registration** for Sessions in this Event. These fields are required but can be updated at the Session level.

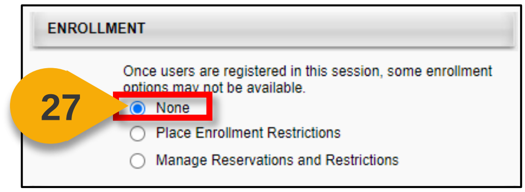


Create Event (Cont. 7)

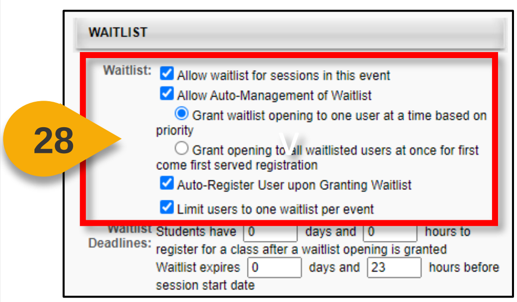
Step 26: If the same vendor is providing all instances of this training, enter this vendor in the **Delivered By field**.



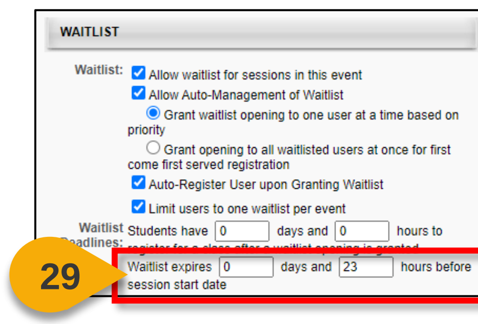
Step 27: In the Enrollment section, select **None**. You will set this when creating Sessions.



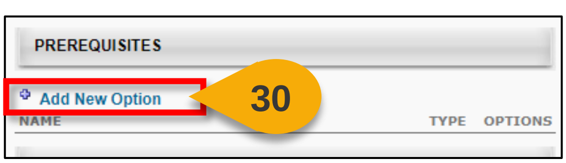
Step 28: In the Waitlist Section, ensure **Allow waitlist for sessions in this event**, **Allow Auto-Management of Waitlist**, **Grant waitlist opening to one User at a time based on priority**, **Auto-Register User upon Granting Waitlist**, and **Limit Users to one waitlist per event** are all checked.



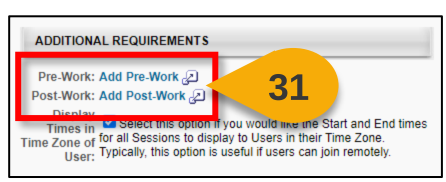
Step 29: Set the **Waitlist Expiration** for this Event, if applicable.



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.



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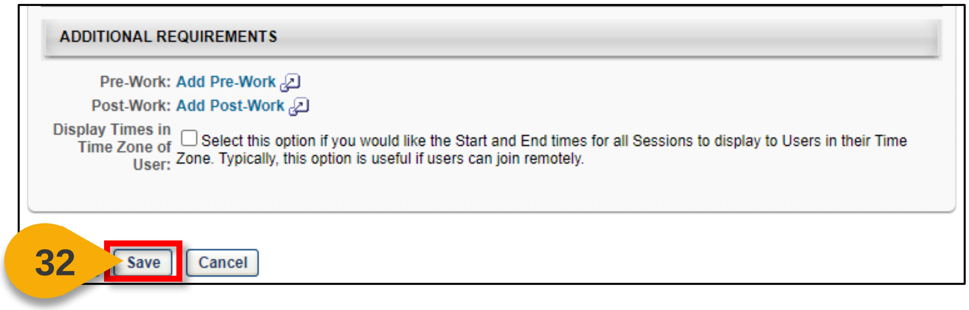
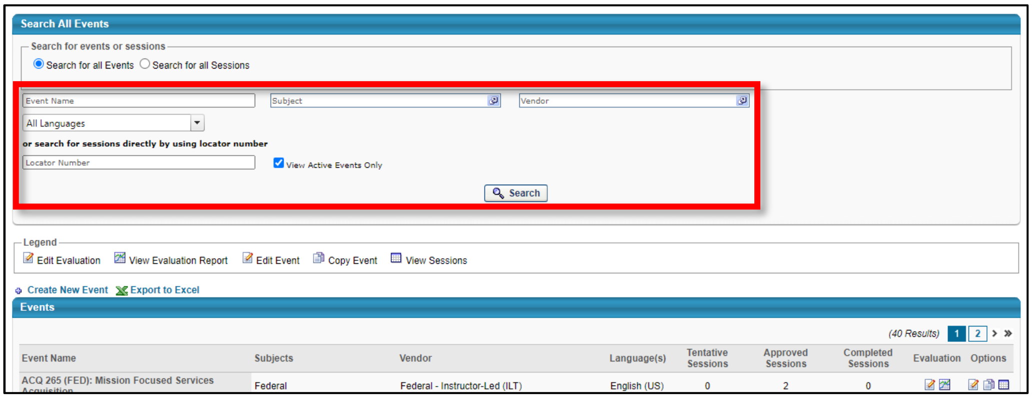
Create Event (Cont. 8)

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



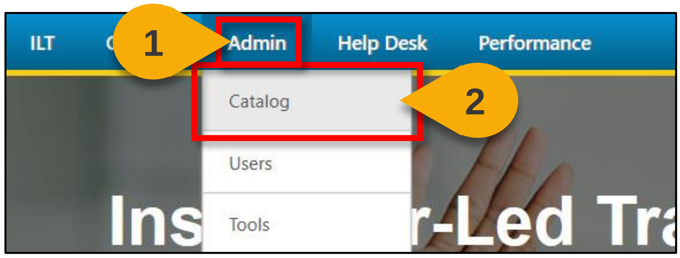
You will be returned to your Manage Events & Sessions page. From here, you can search for and view the Event you created.



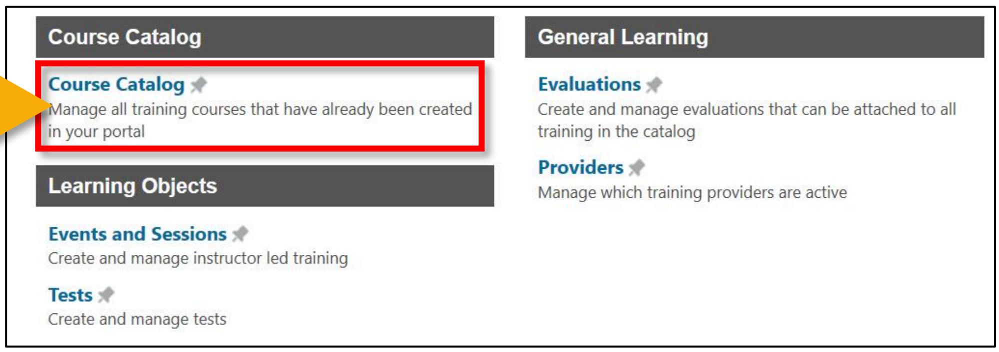
Edit Event

When you want to edit an Event…

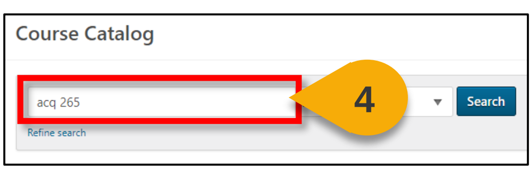
Steps 1 & 2: Hover over the **Admin tab**, then select **Catalog.**



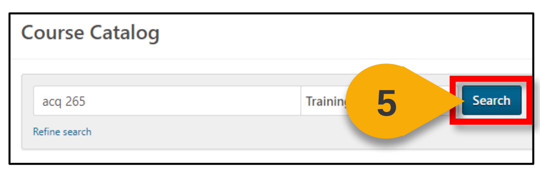
Step 3: Click on **Course Catalog** under Course Catalog heading.



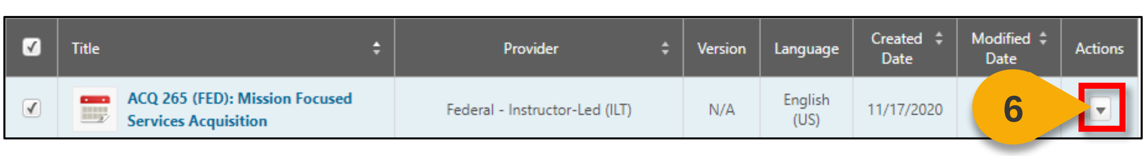
Step 4: Enter the name of the Event you are looking for into the **search field**.



Step 5: Click **Search.**

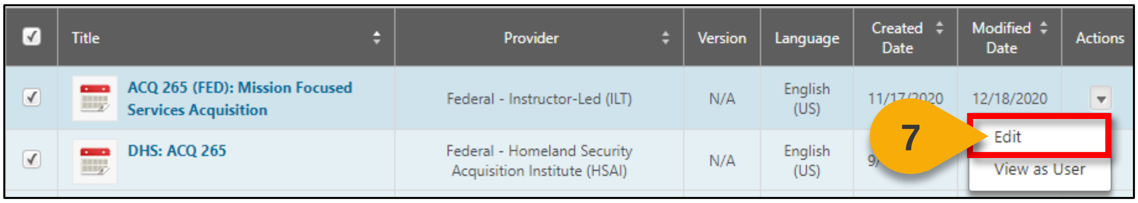


Step 6: Click the **arrow** in the Actions column to the right of the Event name.

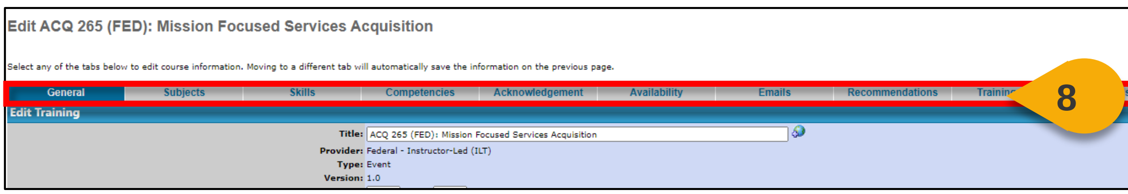


Edit Event (Cont. 1)

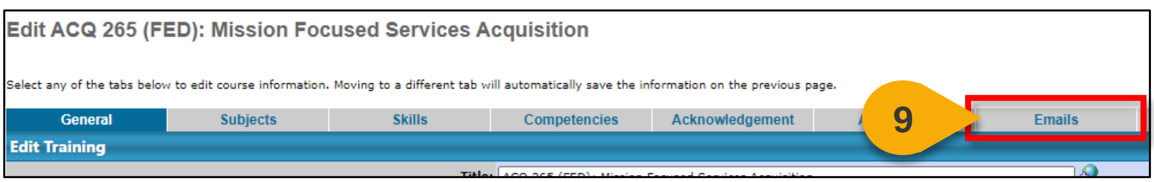
Step 7: Choose **Edit** from the dropdown menu.



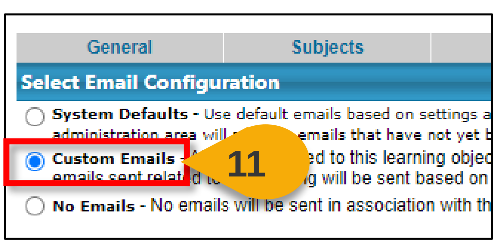
Step 8: Use the **tabs** along the top of the page to edit different elements of this Event.



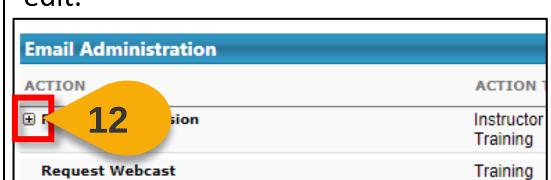
Step 9: To edit the emails that are sent for this Event, click the **Emails tab**.



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



Step 12: A panel will open in the bottom portion of the page. Click the **gray +** next to the email you wish to edit.



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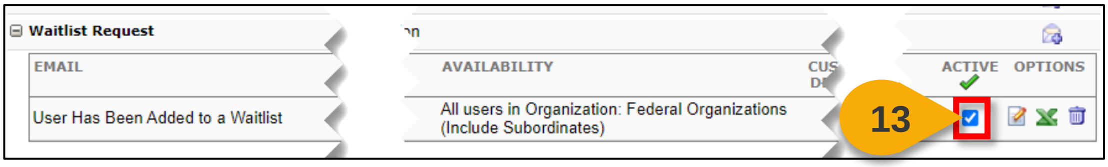
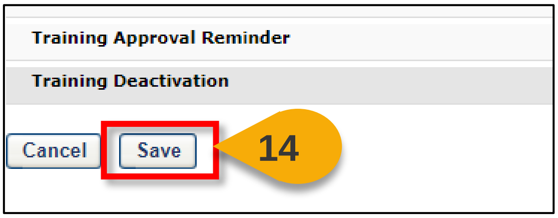
Edit Event (Cont. 2)

Step 13: Check **Active column** for the Federal Organizations email that you would like to trigger for this email.

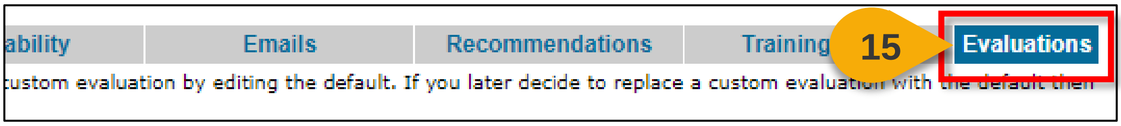


The emails currently set up for Federal Organizations are generic for all Agencies. If you require custom email language for your Agency, please contact faicsod@gsa.gov.

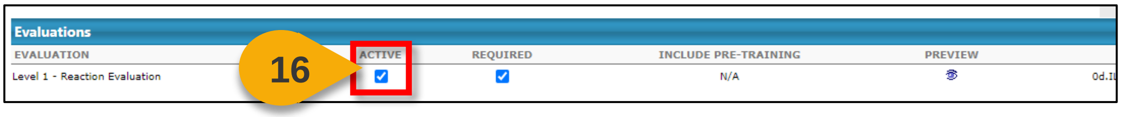
Step 14: Click **Save** or navigate to another tab to save your email choices.



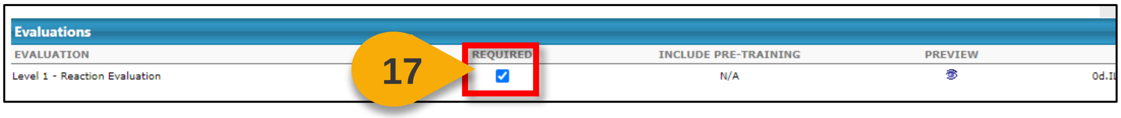
Step 15: To update the Evaluation used for this Event, click the **Evaluations tab**.



Step 16: Check the **box** in the Active column to activate Level 1 Evaluation for this Event.

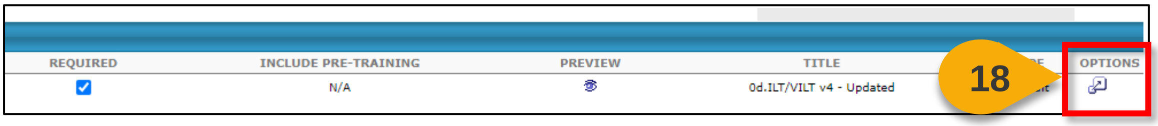


Step 17: Check the **box** in the Required column to require Users complete Evaluation for this Event.

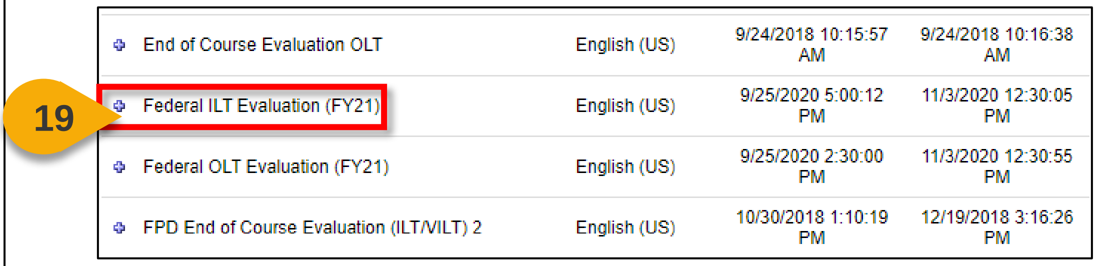


Edit Event (Cont. 3)

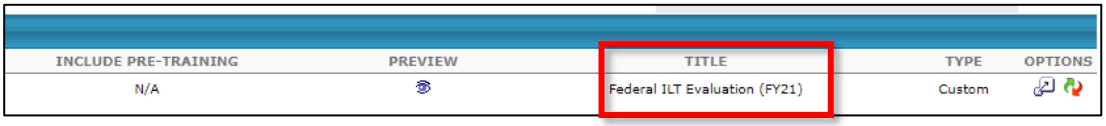
Step 18: Click the **pop-out** in the Options column to select the Evaluation for this Event.



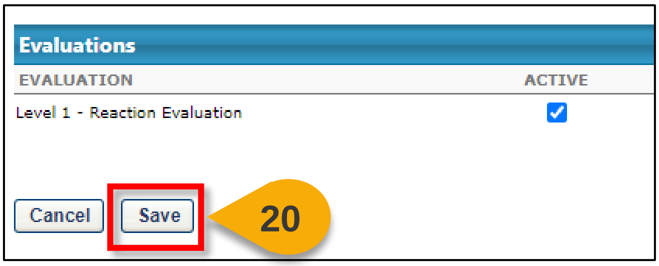
Step 19: Click the **blue +** next to the Evaluation you wish to use for this Event.



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



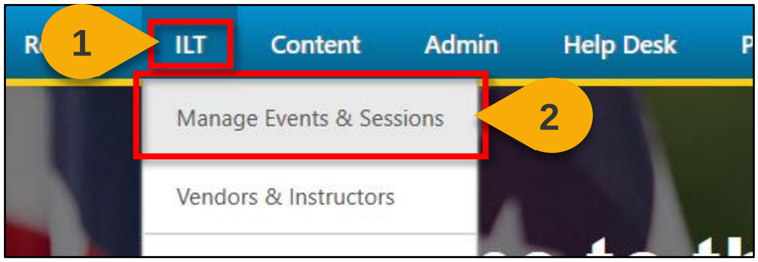
Step 20: Click **Save** or navigate to another tab to save these changes.



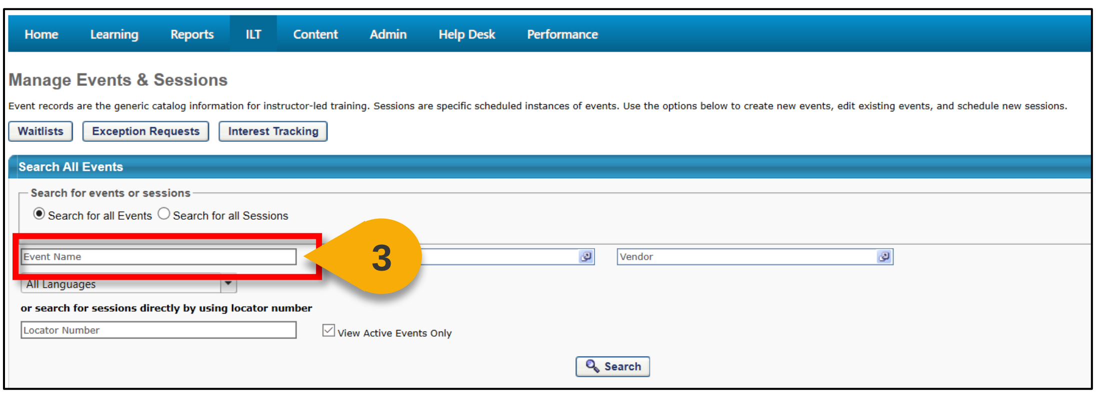
Create Sessions

When you want to create a Session…

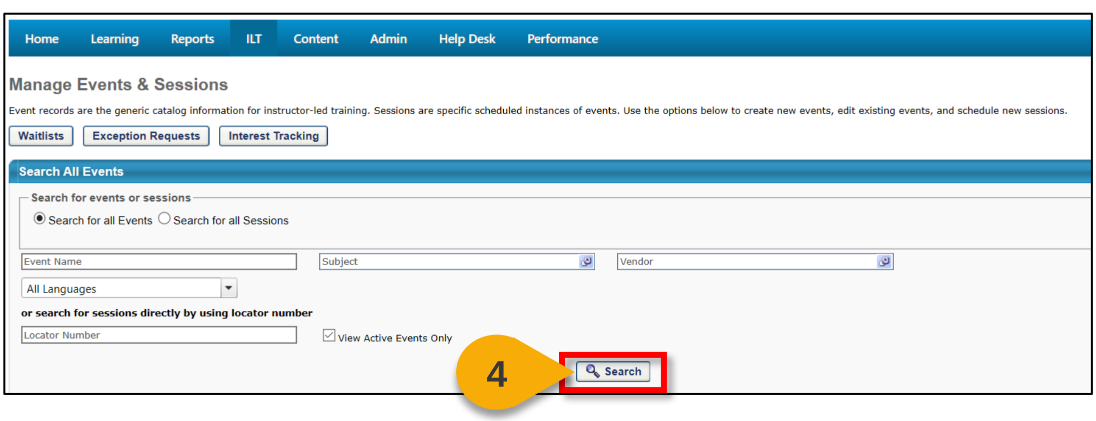
Steps 1 & 2: Hover over the **ILT tab**, then select **Manage Events & Sessions.**



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.



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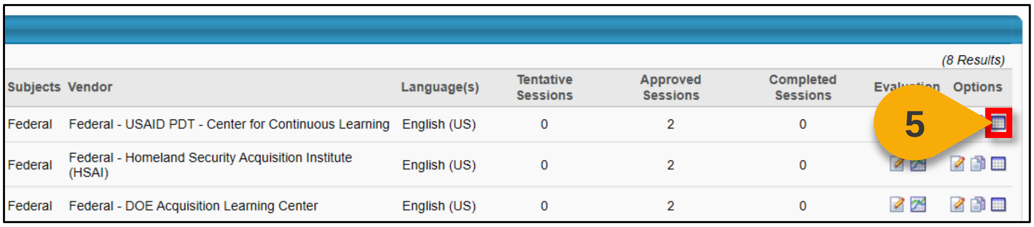
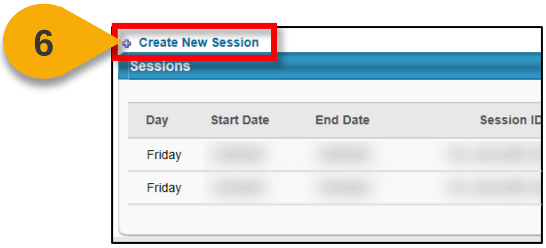
Create Sessions (Cont.1)

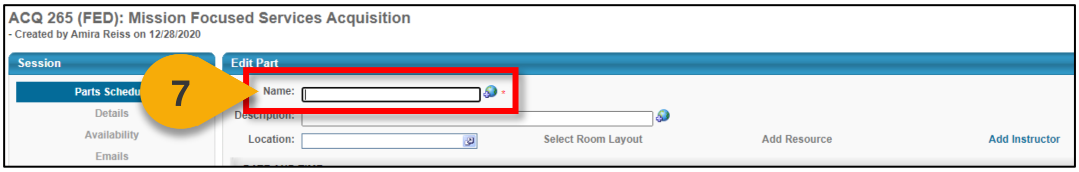
Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



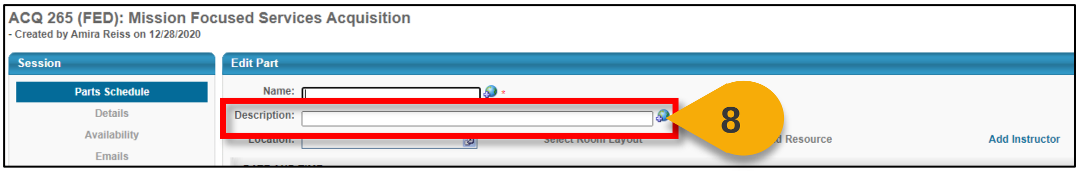
Step 6: Click **Create New Session.**



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).



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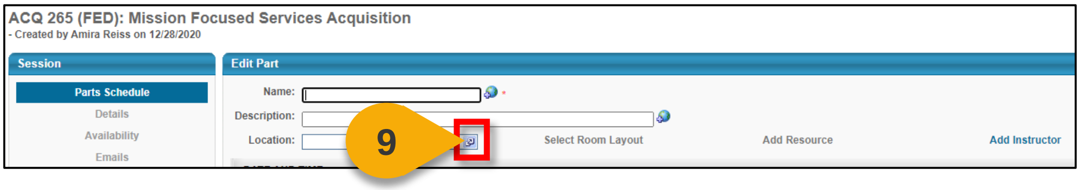
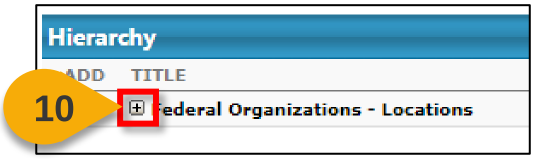
Create Sessions (Cont. 2)

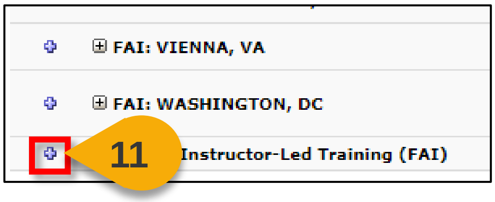
Step 9: Choose a Location for this Session by clicking the **pop-out** next to the Location field.



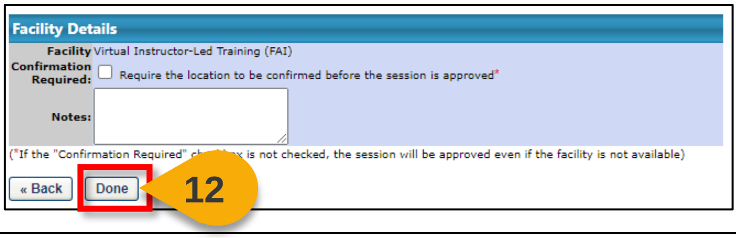
Step 10: Click the **gray +** next to a Location to drill down to the Location for this Session.



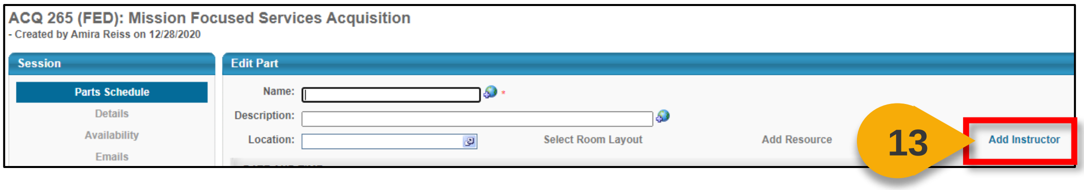
Step 11: Click the **blue +** next to a Location to select it.



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.



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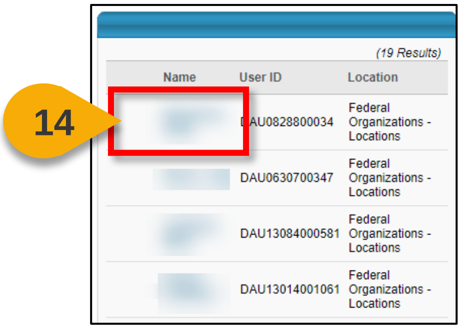
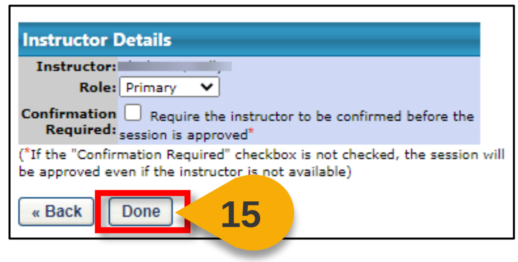
Create Sessions (Cont. 3)

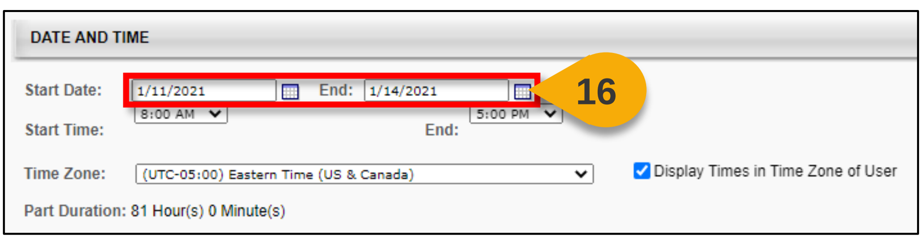
Step 14: Click the **Name** of the User you would like to make the Instructor of this Session.



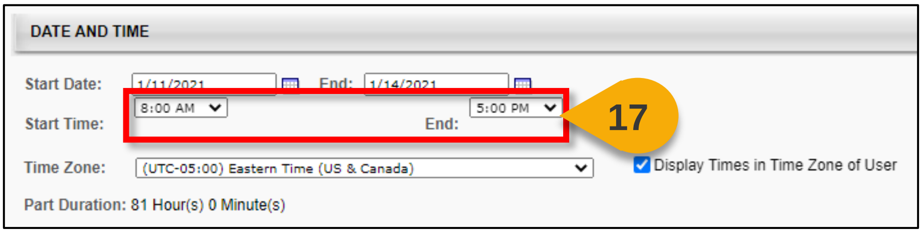
Step 15: In the Instructor Details window, click **Done** to add this Instructor to the Session.



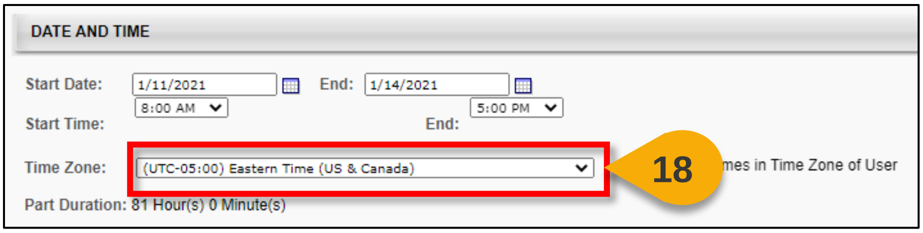
Step 16: In the Date and Time section, enter a **Start Date** and **End Date** for this Session.



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



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



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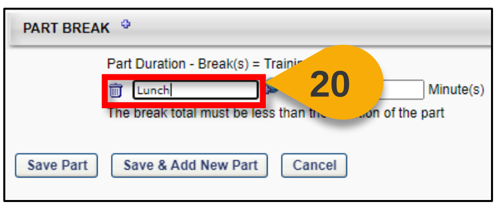
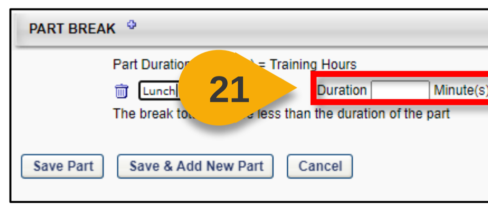
Create Sessions (Cont. 4)

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.

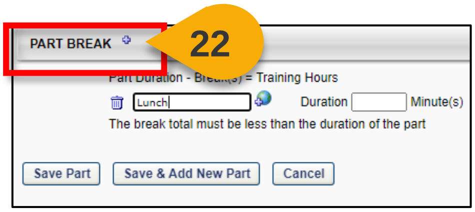
Step 20: Label the **Part Break.**



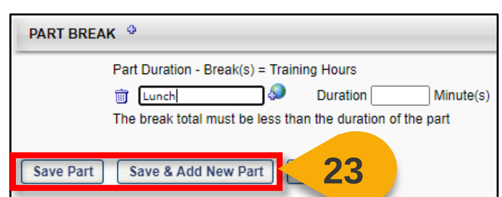
Step 21: Set the **Part Duration** in minutes.



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



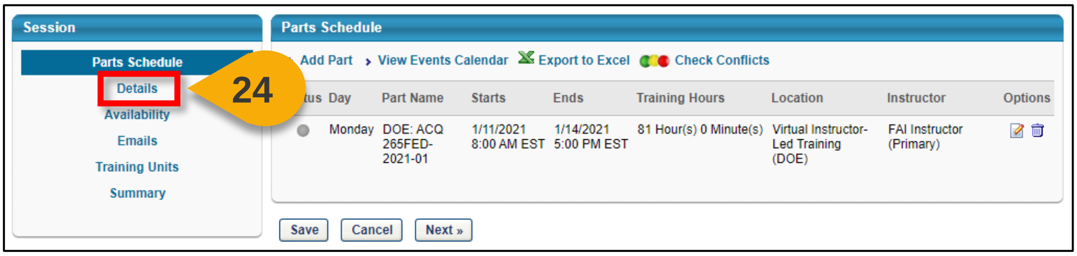
Step 23: Click **Save & Add New Part** to create another Part for this Session (this functionality is frequently used for multi-day Sessions) or click **Save Part** to save this information.



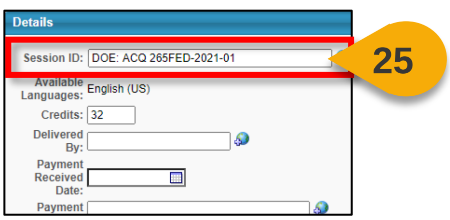
If the session duration is more than a day, or if separate sessions within the same day are required, add the session parts by clicking the Add Part link on the Parts Schedule page. See *Create Session –Parts* on CSOD's Online Help for more information.

Create Sessions (Cont. 5)

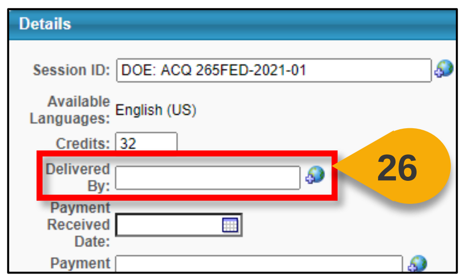
Step 24: You will now see a Summary of the Part information for this Session. Click the **Details tab** in the left-hand menu.



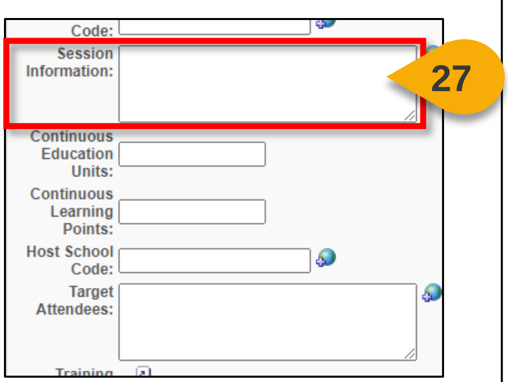
Step 25: The Session will inherit any defaults set at the Event level. You may change these values if required. Enter the Part Name you chose into the **Session ID field**.



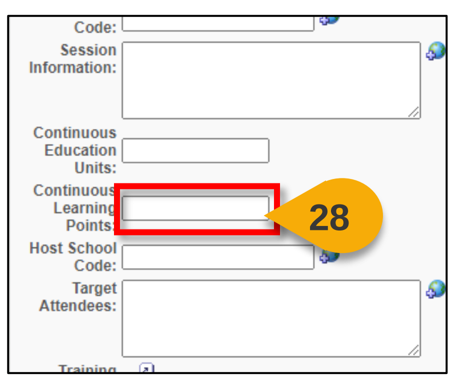
Step 26: If this Session is offered by an external training vendor, enter that Vendor into the **Delivered By field**.



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.



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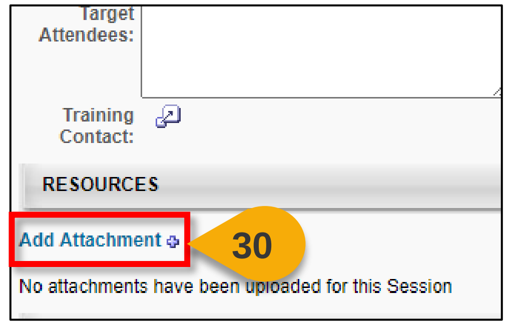
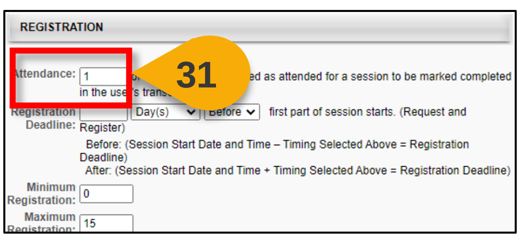
Create Sessions (Cont. 6)

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

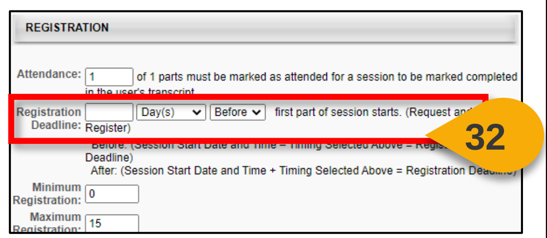
Step 30: If there are resources Users need prior to the Session, add them to the Resources section by clicking the **blue +** next to Add Attachment.



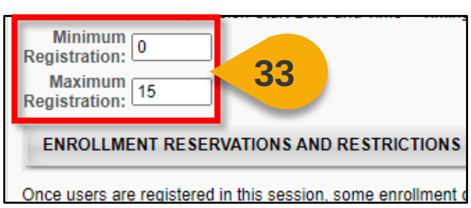
Step 31: In the Registration section, enter the **Attendance** requirements. This field will dictate how many parts Users must attend to get credit for the course.



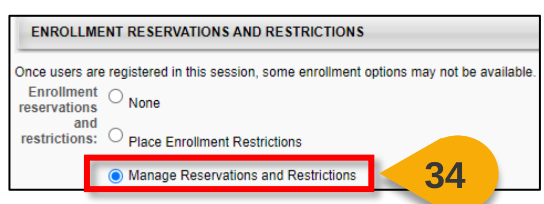
Step 32: If applicable, set the **Registration Deadline** by indicating at which point Users can no longer Register or Request the Session.



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**.



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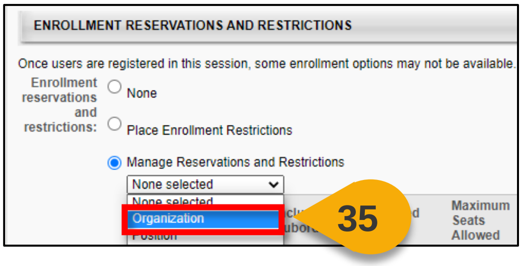
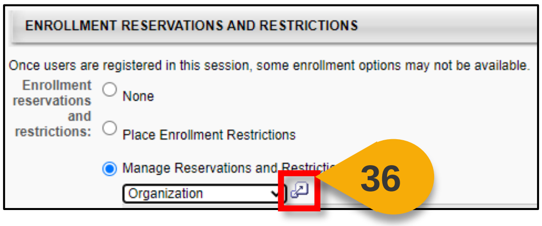
Create Sessions (Cont. 7)

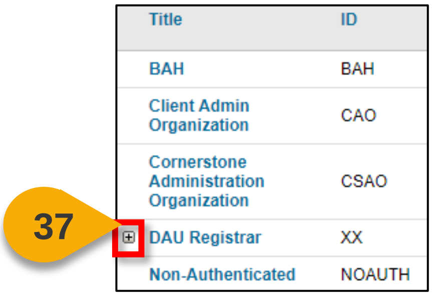
Step 35: A drop-down menu will appear. Choose **Organization.**



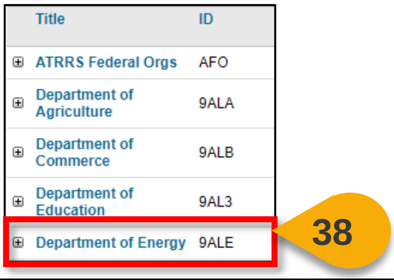
Step 36: Click the **pop-out** next to Organization to view the list of Organizations.



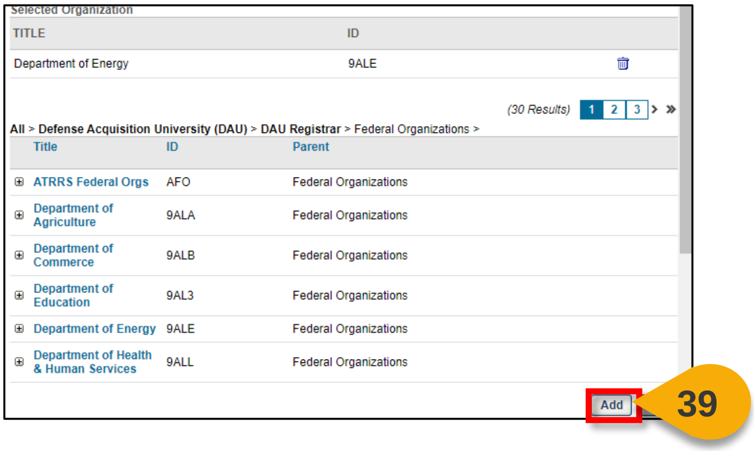
Step 37: In the window that opens, click the **gray +** next to DAU Registrar to drill down to your Schoolhouse.



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.



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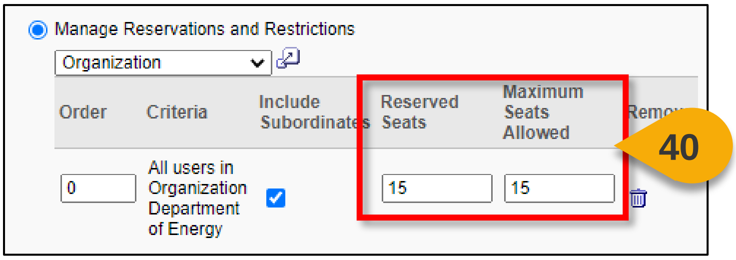
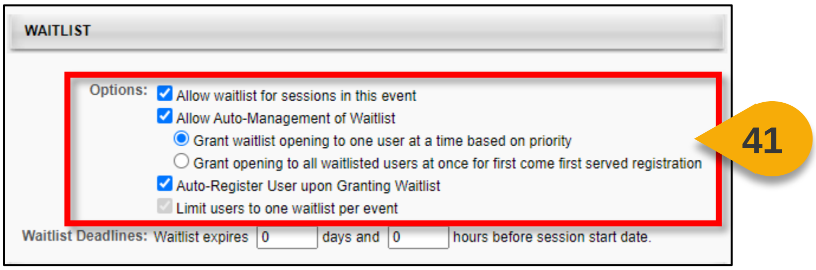
Create Sessions (Cont. 8)

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.



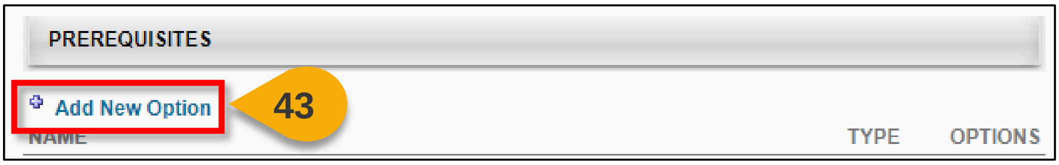
Step 41: In the Waitlist Section, ensure **Allow waitlist for sessions in this event**, **Allow Auto-Management of Waitlist**, **Grant waitlist opening to one User at a time based on priority**, **Auto-Register User upon Granting Waitlist**, and **Limit Users to one waitlist per event** are all checked.



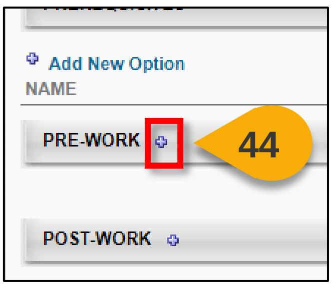
Step 42: If you would like the Waitlist to expire, enter the criteria for that expiration in the **Waitlist Deadlines fields**.

Create Sessions (Cont. 9)

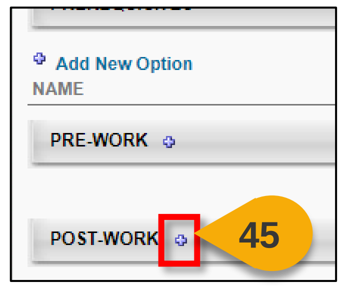
Step 43: If the Session has a prerequisite, click **Add New Option** in the Prerequisites section.



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

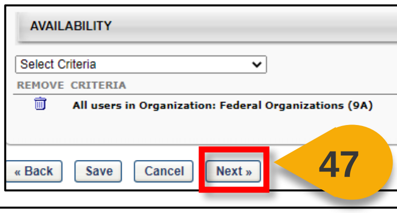


Step 44: If the Session has post-work, click the **blue +** in the Post-Work section to add it to the Session.



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. While the Session will inherit the availability of the Event, you can make it only 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**.



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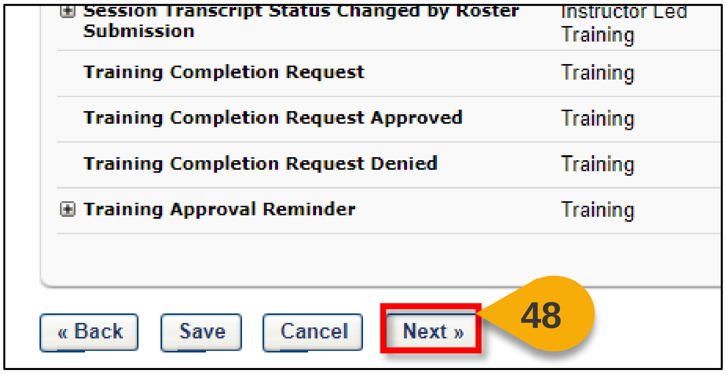
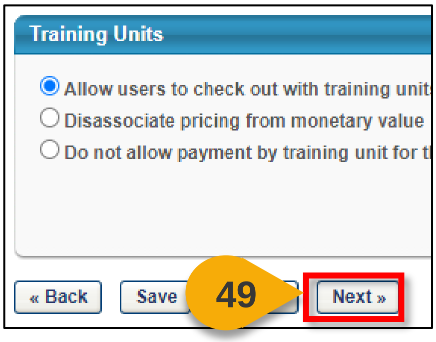
Create Sessions (Cont. 10)

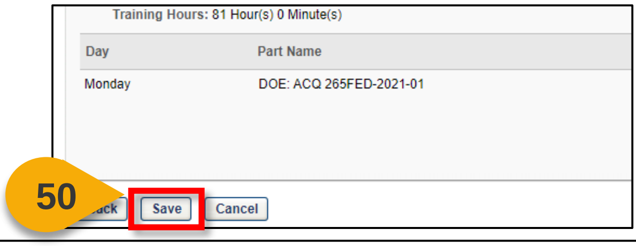
Step 48: The email settings will be inherited from the event. Confirm the emails you would like to use are selected. Click **Next**.



Step 49: You will not use the Training Units tab. Click **Next**.



Step 50: 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.



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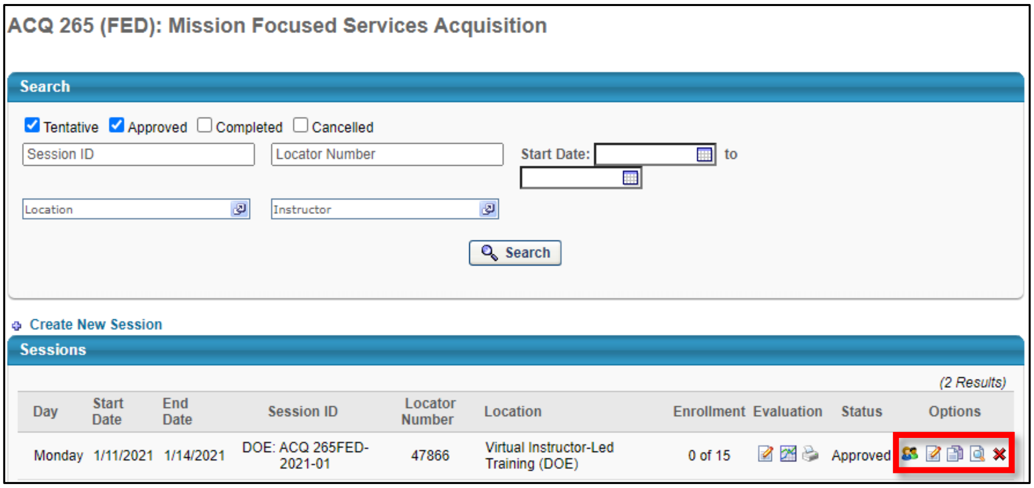
Create Sessions (Cont. 11)

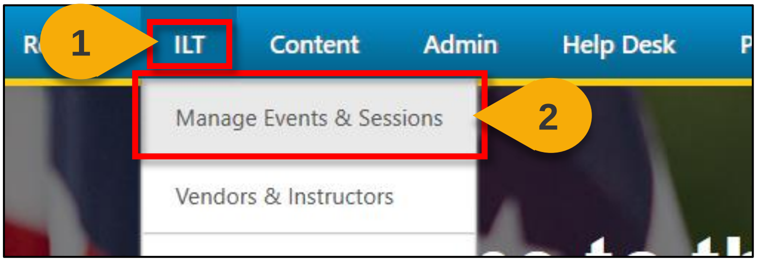
The Session is now available to Users. You will be returned to the Event page, where the Session is now listed. From here, you can **view the Roster**, **edit the Session**, **copy the Session**, or **cancel the Session**.



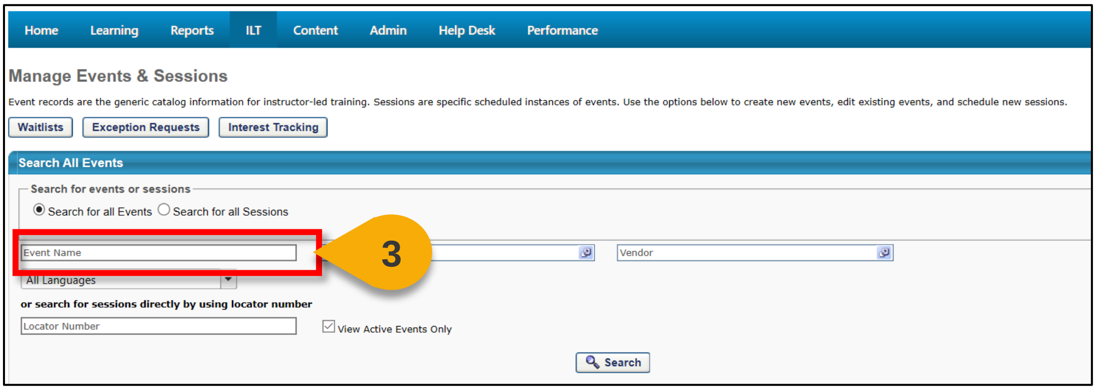
Edit Sessions

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

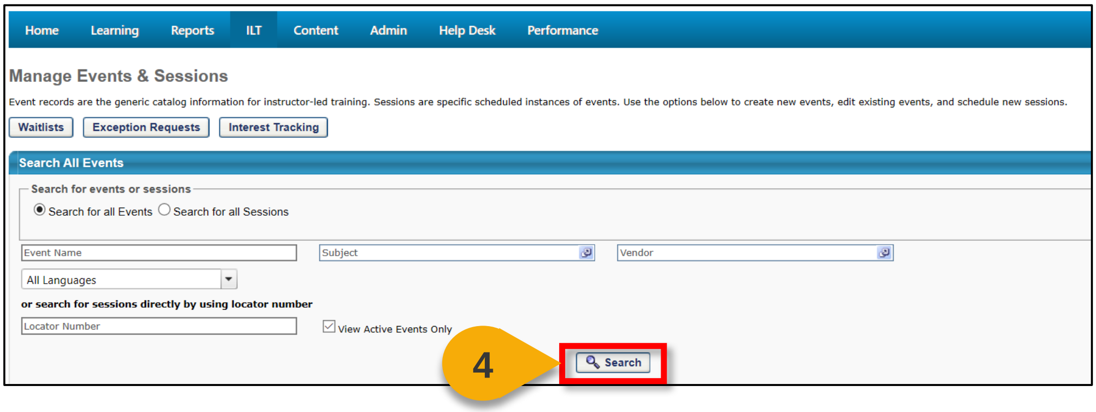
Steps 1 & 2: Hover over the **ILT tab**, and then select **Manage Events & Sessions.**



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

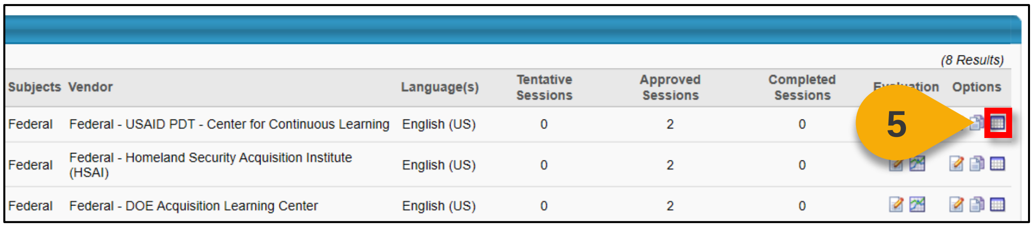


Step 4: Click **Search** or hit **Enter.**

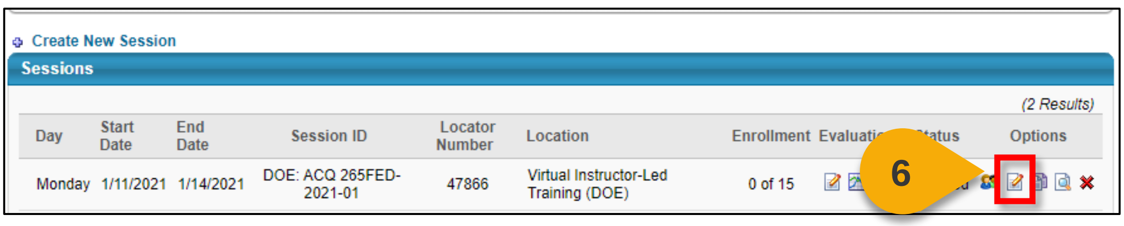


Edit Sessions (Cont. 1)

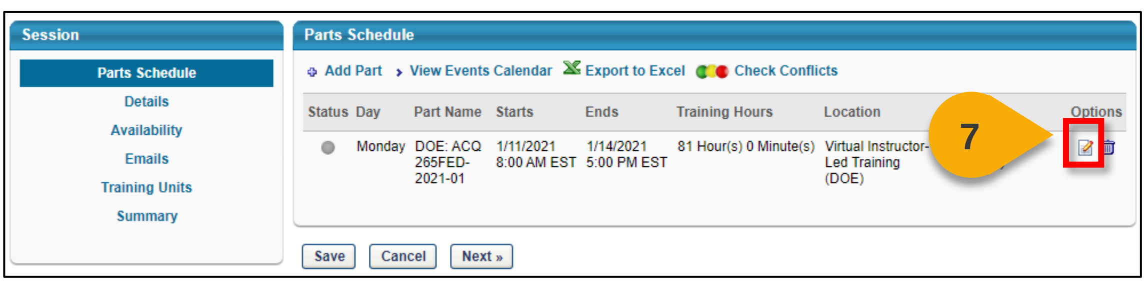
Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



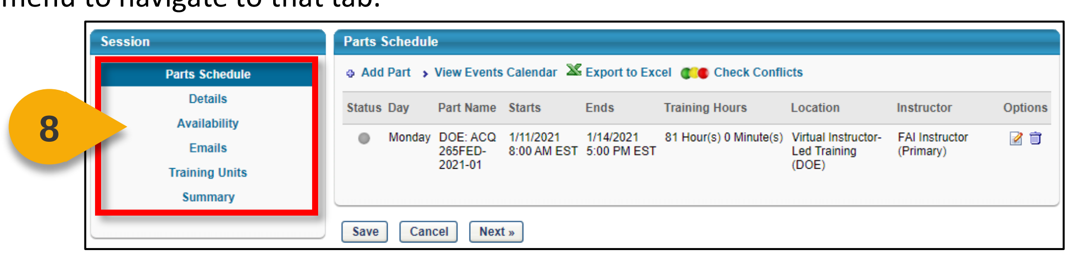
Step 6: Click the **Edit icon** in the Options column to the right of the Session you would like to edit.



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

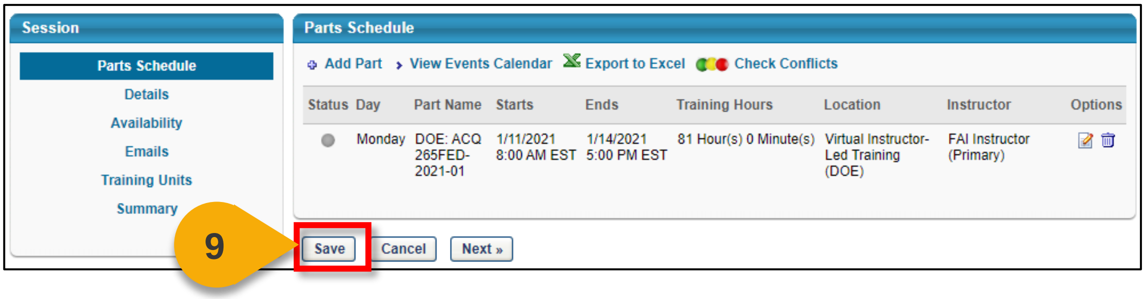


Step 8: To edit the details on any other tabs, click on the tab **Name** in the left-hand menu to navigate to that tab.

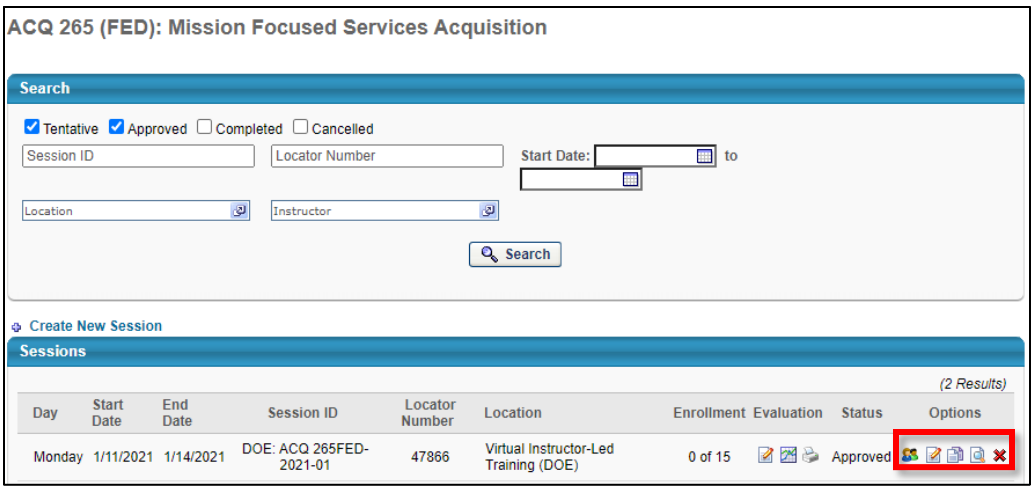


Edit Sessions (Cont. 2)

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



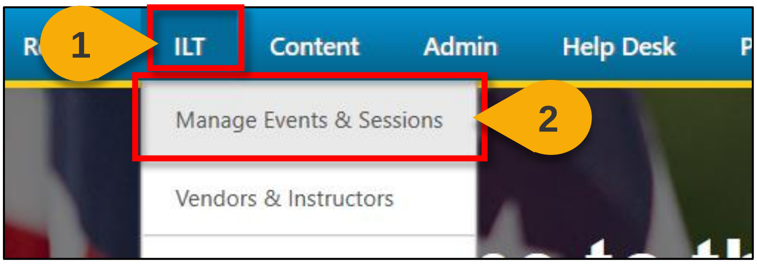
The Session is now available to Users. You will be returned to the Event page, where the Session is now listed. From here, you can **view the Roster**, **edit the Session**, **copy the Session**, or **cancel the Session**.



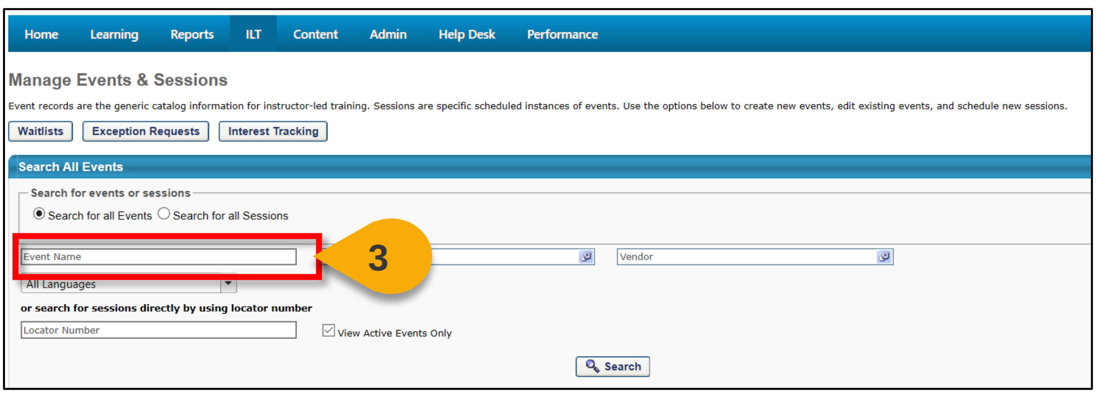
Cancel Sessions

When you want to cancel a Session…

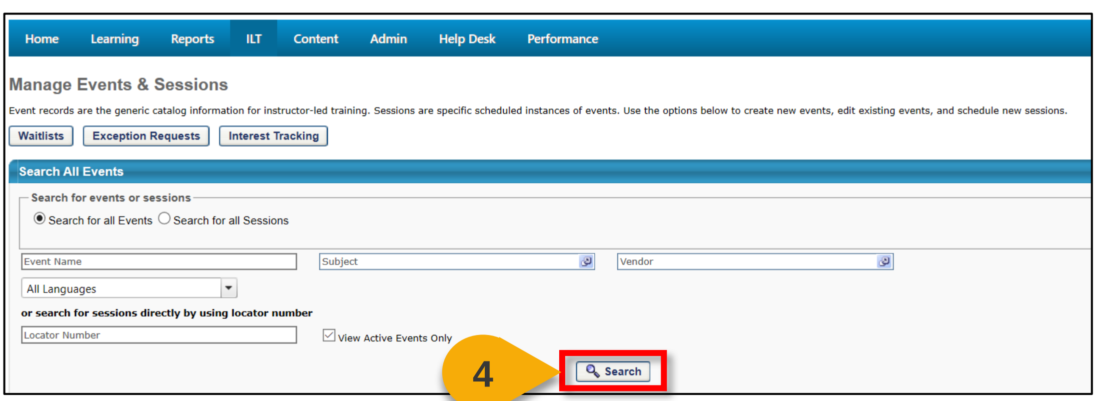
Steps 1 & 2: Hover over the **ILT tab**, then click on **Manage Events & Sessions.**



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.**



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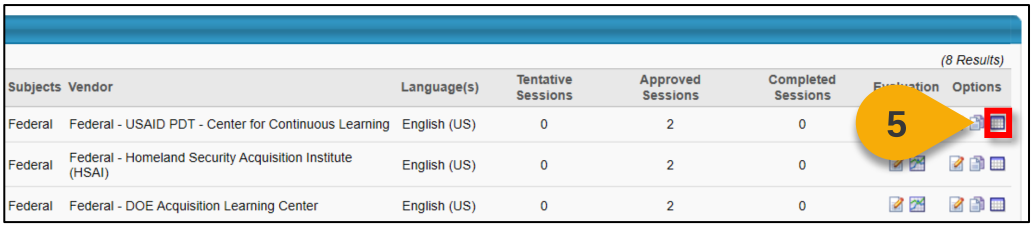
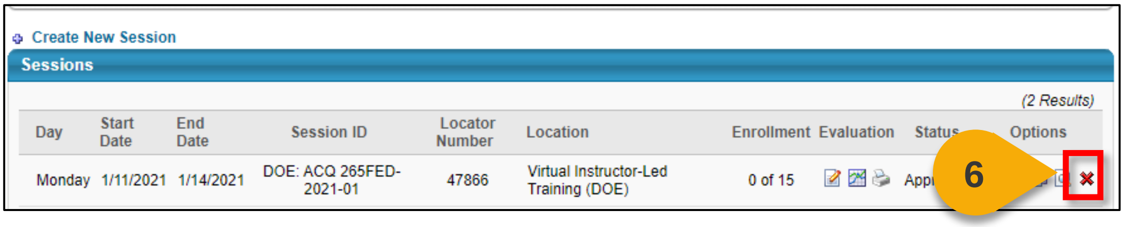
Cancel Sessions (Cont. 1)

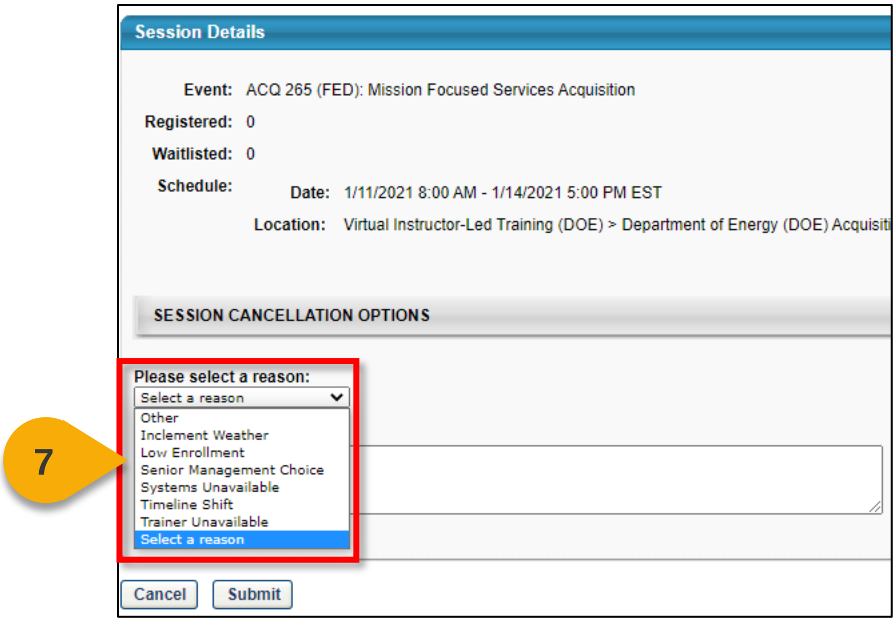
Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



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

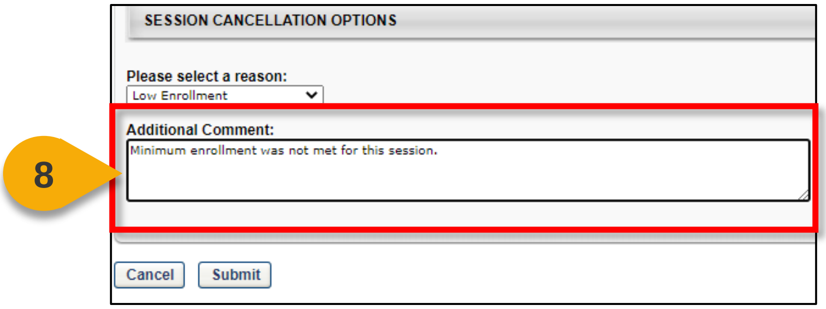


Step 7: The Session Details page will show details about the Session and Session Cancellation Options. Choose a reason for cancelling the Session in the **Please Select a Reason** dropdown menu.

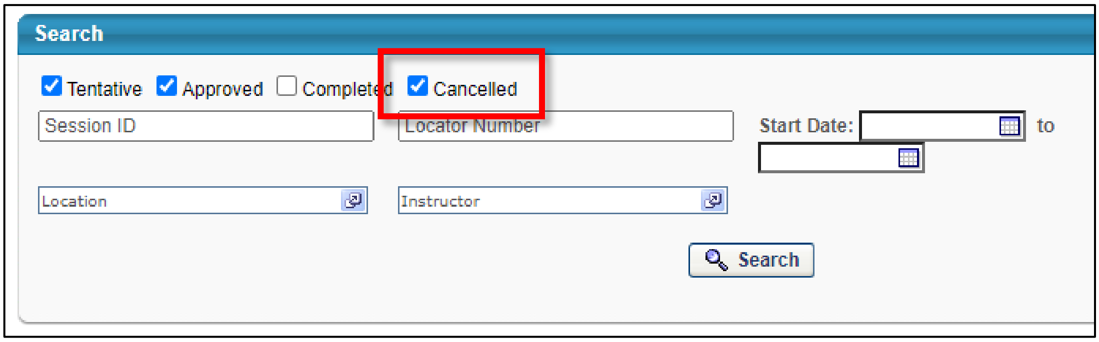


Cancel Sessions (Cont. 2)

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.

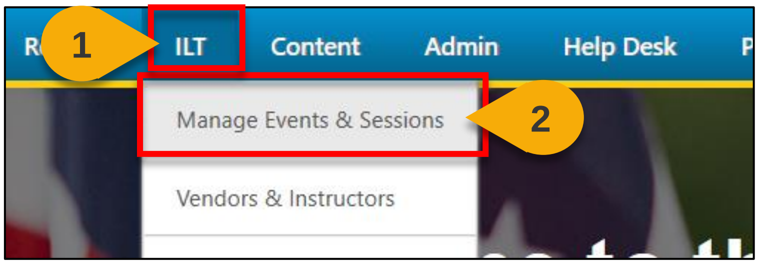


Roster & Waitlist Management

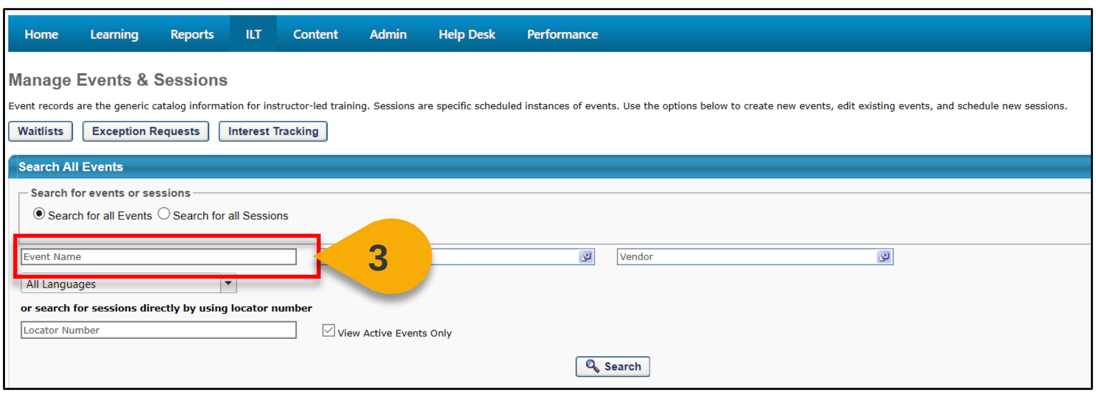
View Session Roster

When you want to view the Roster for an ILT…

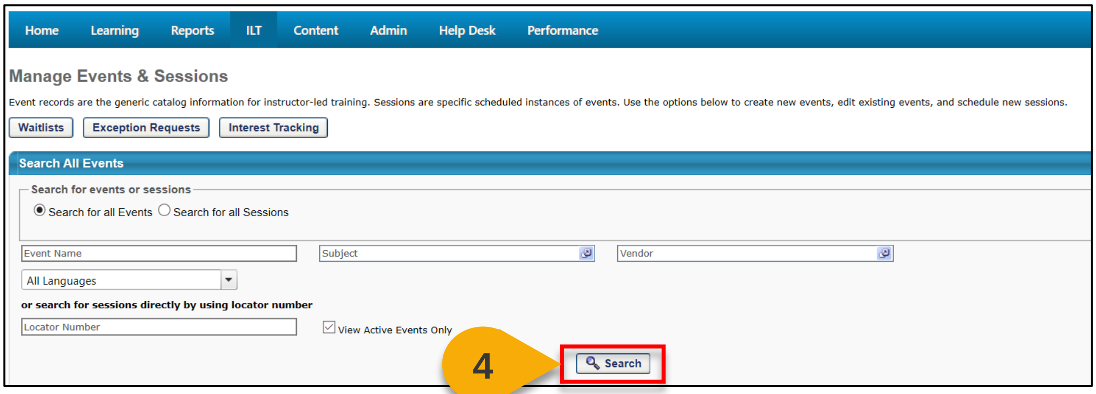
Steps 1 & 2: Hover over the **ILT tab** and click **Manage Events & Sessions.**



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.**



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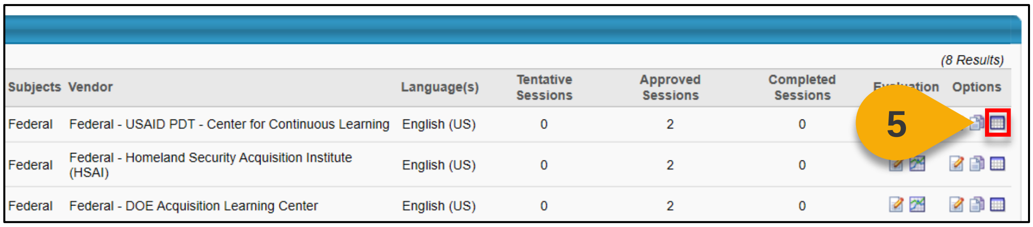
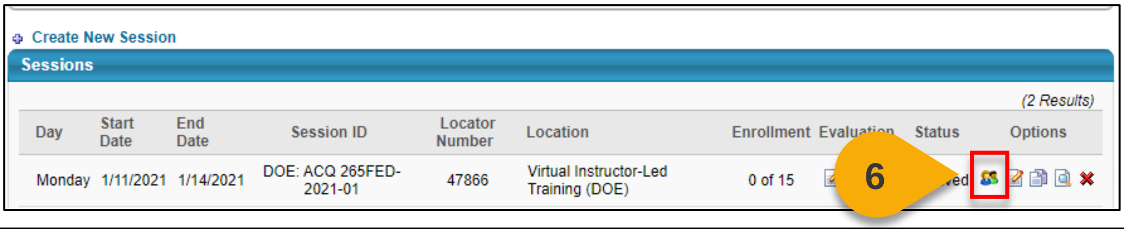
View Session Roster (Cont. 1)

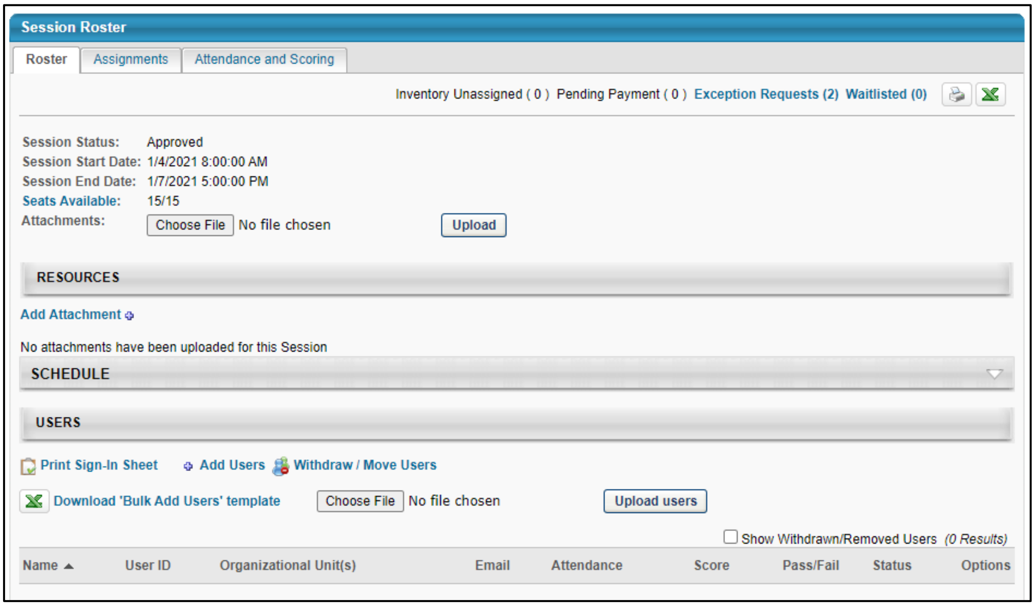
Step 5: Select the **View Sessions icon** under the Options column to the right of the Event name.



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



Step 7: From this page, you may view Users on the Roster and Waitlist. Additionally, you can manage enrollment and attendance.



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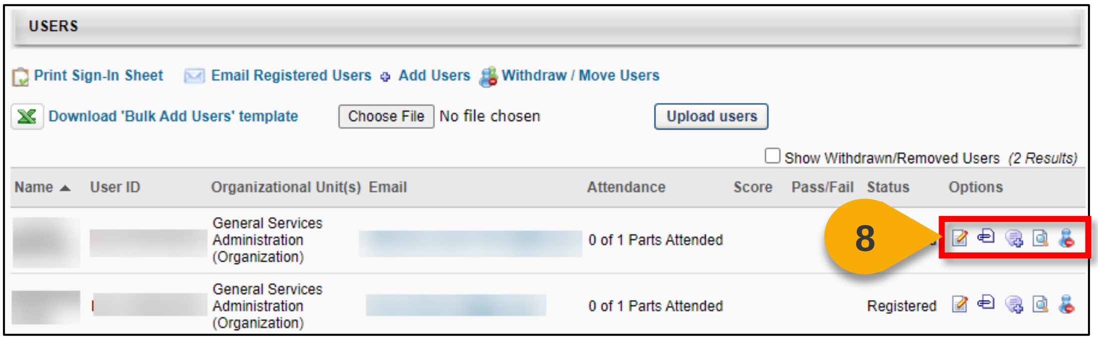
View Session Roster (Cont. 2)

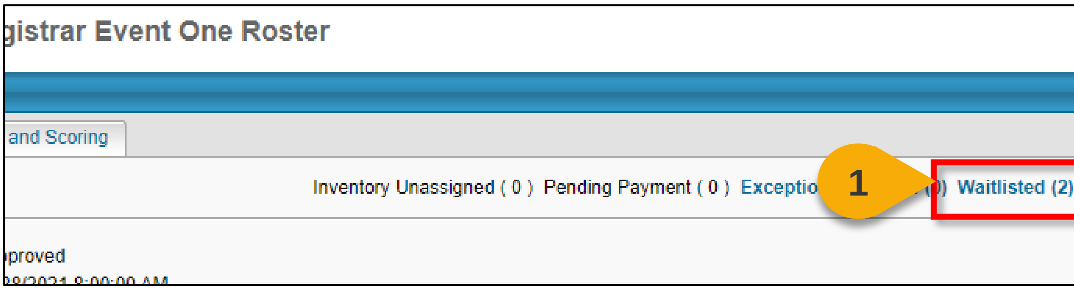
Step 8: In the Users section of the Roster, you will see the Users who have been granted seats in the Session. Use the icons in the **Options** column to view the User's enrollment history or remove the User from the Roster.



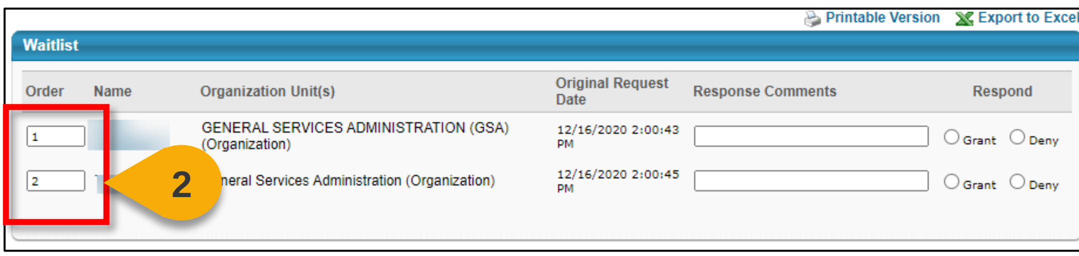
Manage Waitlist

When you want to manage a waitlist for an ILT…

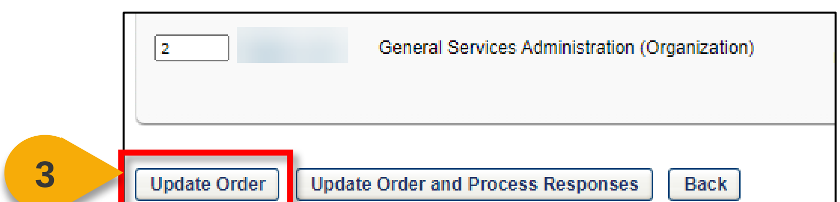
Step 1: Use the “View Session Roster” task aid to navigate to the Session Roster. Click the **Waitlisted link** in the top-right to view the Waitlist.



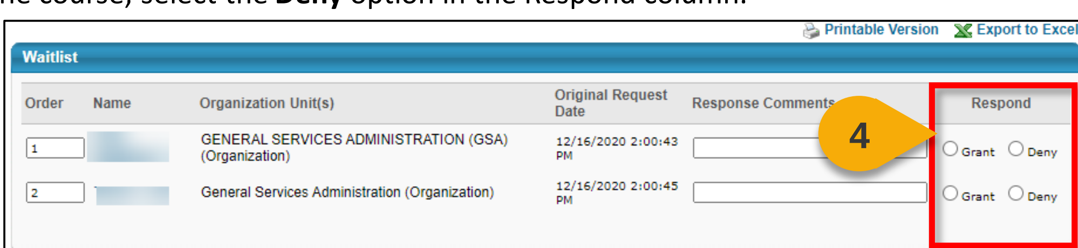
Step 2: The Waitlist will display. Edit Waitlist priority by changing the numbers in the **Order** column. The User with Order 1 will have first priority for an open spot in the course.



Step 3: Click **Update Order** to save these changes.



Step 4: 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.



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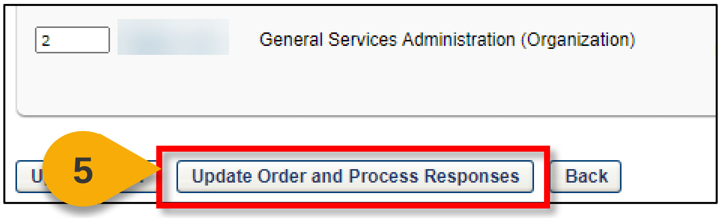
Manage Waitlist (Cont. 1)

Step 5: Click **Update Order and Process Responses** to save these changes.

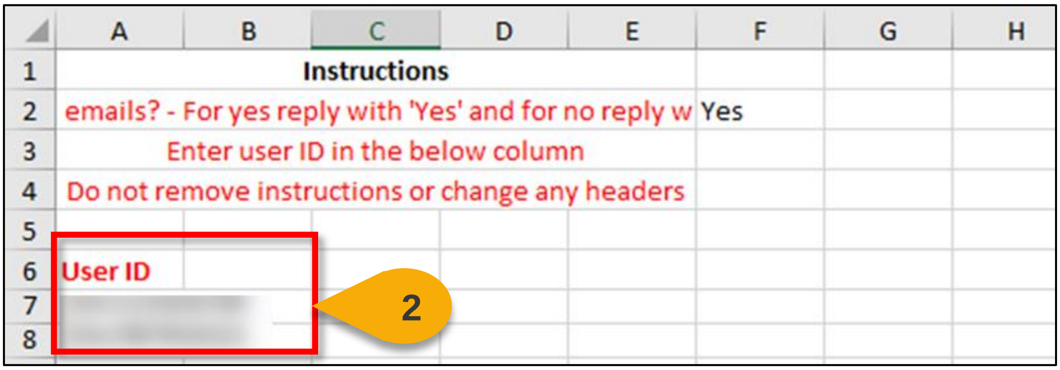


Update Roster via Upload

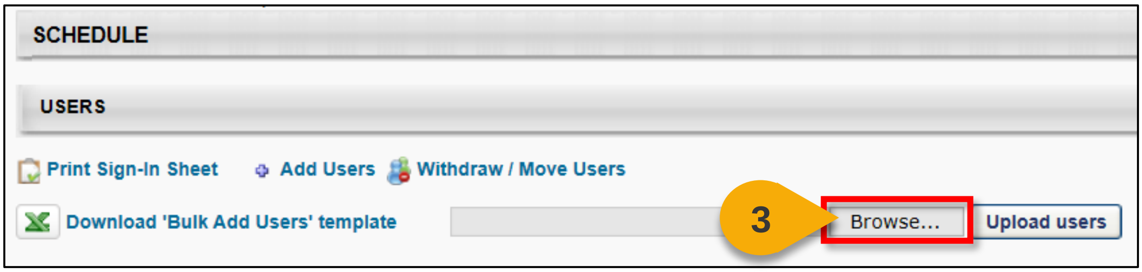
When you want to upload an updated Roster…

Step 1: Use the "View Session Roster" task aid to navigate to the Session Roster. Click on **Download 'Bulk Add Users' template**. A Microsoft Excel file will download.

Step 2: In the file, enter the **User ID** of each User you want to add to the Roster into the spreadsheet and save the file. Alternatively, you can enter the **User's email**.

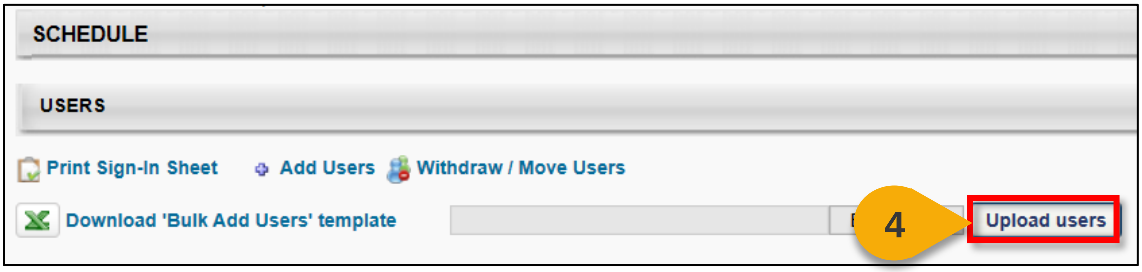


Step 3: Save the file to your computer. On the Roster page, click **Browse** and choose the Roster file you wish to upload.

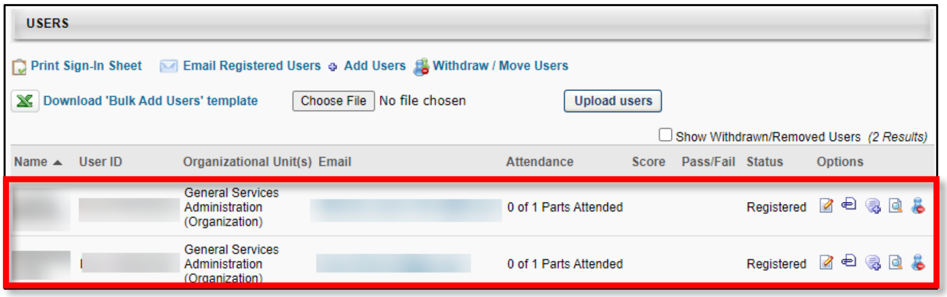


Update Roster via Upload (Cont. 1)

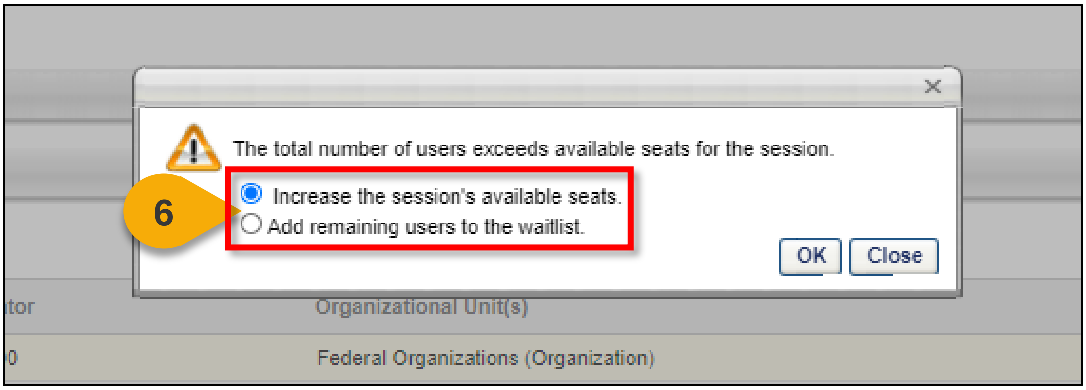
Step 4: Click **Upload Users**.



Step 5: If there are sufficient seats on the Roster, Users will we added to the Roster.



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.**



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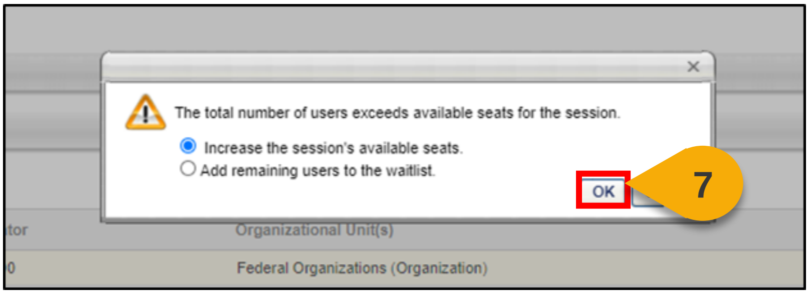
Update Roster via Upload (Cont. 2)

Step 7: After choosing your preferred option, select **OK.** Users will be added to the Roster and/or the Waitlist.

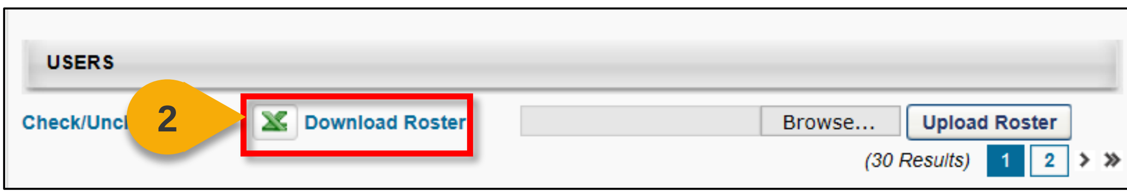


Upload Attendance

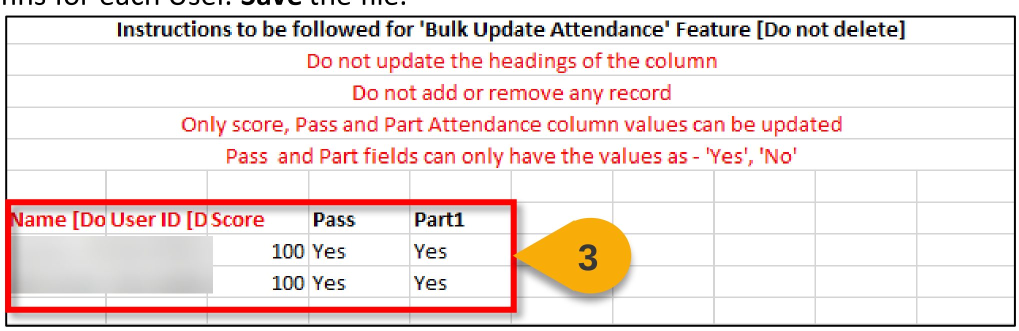
When you want to upload an attendance sheet to the Roster…

Step 1: Use the "View Session Roster" task aid to navigate to the Session Roster. Click on the **Attendance and Scoring tab**.

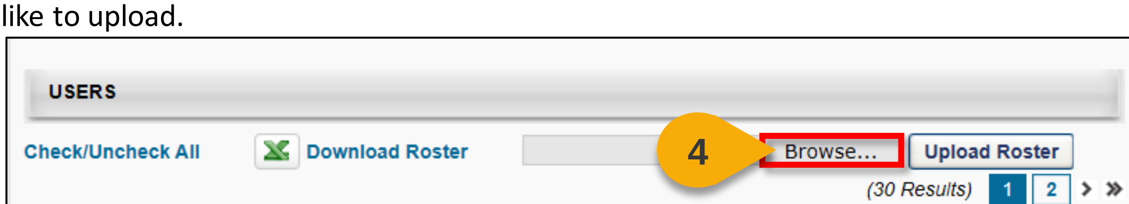
Step 2: Click **Download Roster**. The file will download to your computer.



Step 3: In the Excel file you downloaded, update the **Score, Pass, and Part Attendance** columns for each User. **Save** the file.



Step 4: On the Roster page, click on **Browse.** Select the attendance sheet you would like to upload.



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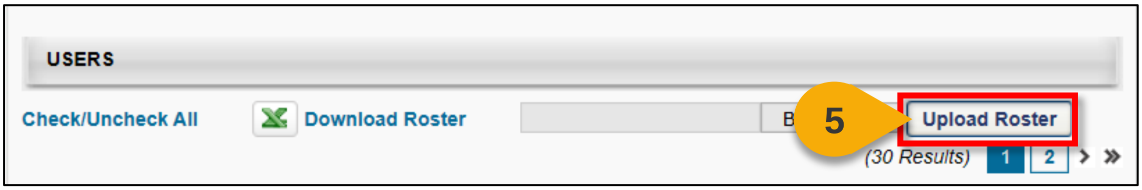
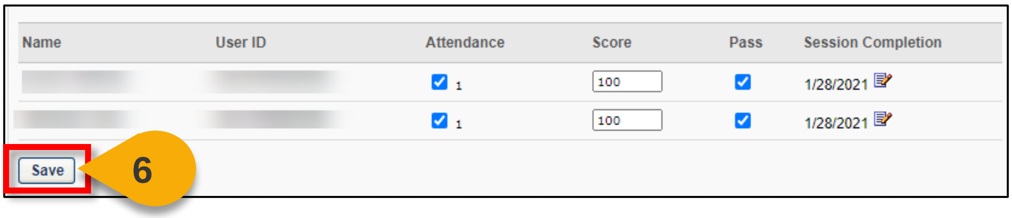
Upload Attendance (Cont. 1)

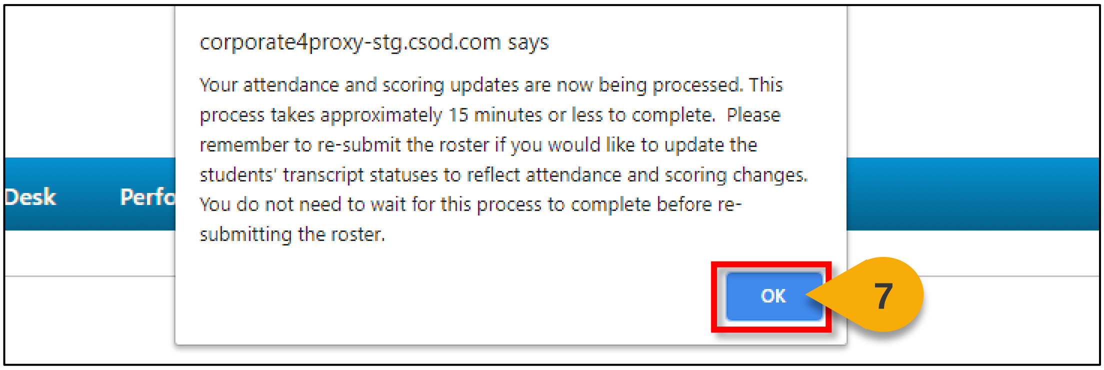
Step 5: Click on **Upload Roster.** The attendance sheet will then be uploaded.



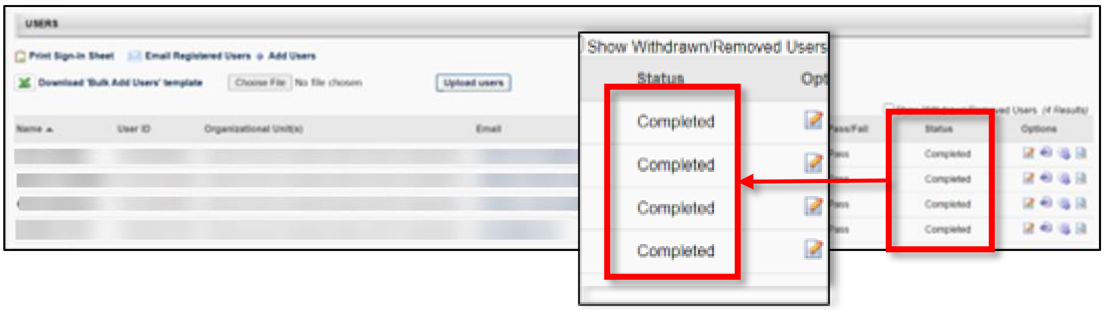
Step 6: The Attendance page will update. Click **Save** to save the updated attendance.



Step 7: A popup will appear to notify you that the attendance is being updated and that the process will take about 15 minutes. Click **Ok.**



Step 8: The page will refresh and display the roster tab. Once the attendance processes in about 15 minutes, the list of Users will be updated with the completion status.



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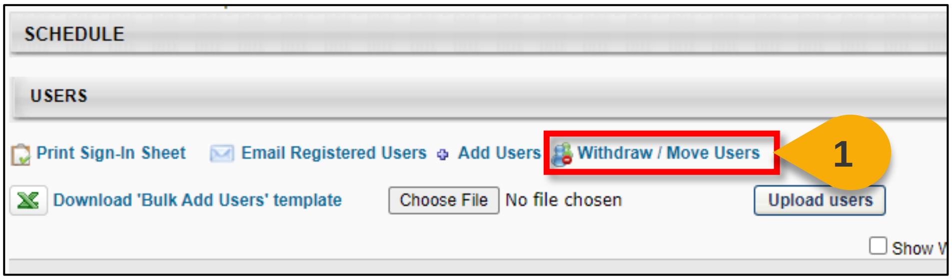
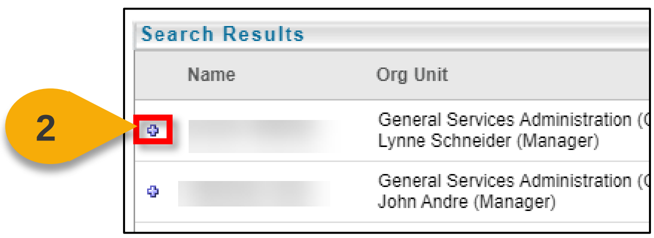
Move Users Between Sessions

When you want to move a User to another Session…

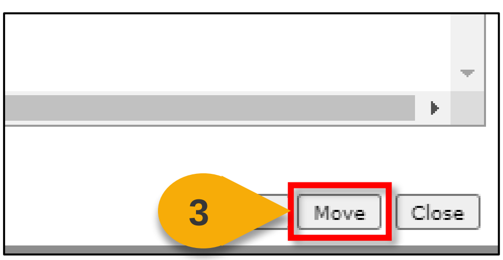
Step 1: Use the “View Session Roster” task aid to navigate to the Session Roster. In the Users panel, click the **Withdraw/Move Users link**.



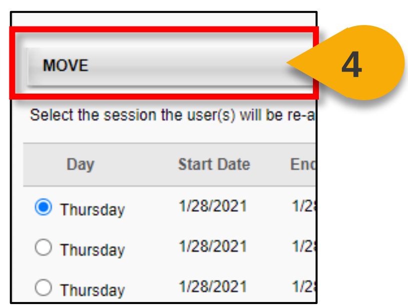
Step 2: In the Withdraw/Move Users window, click the **blue +** next to the Users you wish to move to different Session.



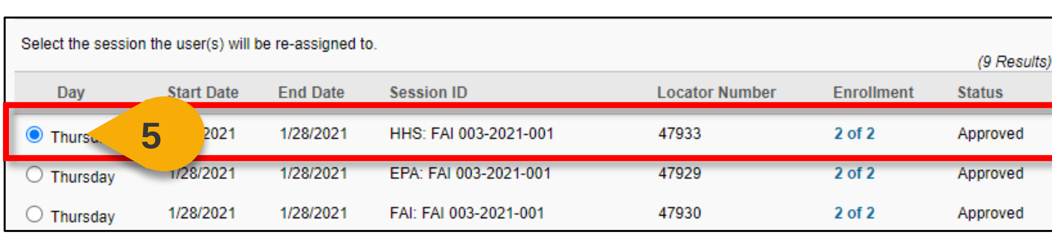
Step 3: After you have selected the desired Users, click **Move** at the bottom of the window.



Step 4: A new window will open. Scroll down to the **Move** section.

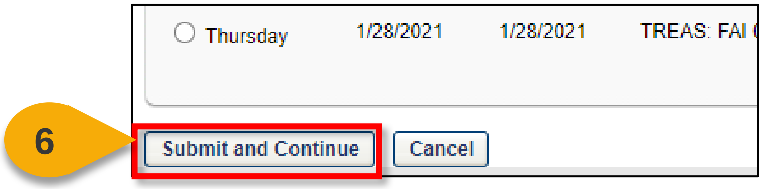


Step 5: Select **the Session** you would like to move the User(s) to.

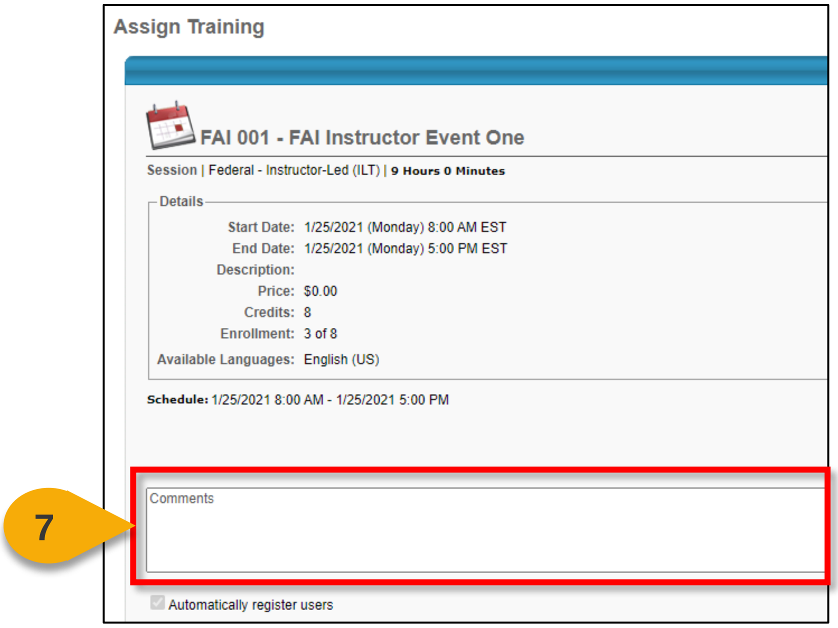


Move Users Between Sessions (Cont. 1)

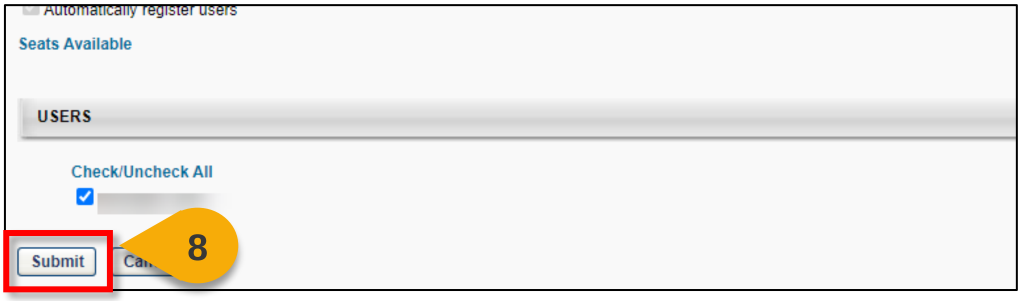
Step 6: Click **Submit and Continue**.



Step 7: You will then need to assign the new training to the User. Add any **comments** on the Assign Training screen.



Step 8: Click **Submit** to enroll the User in the new Session. The User will now appear on the new Roster.



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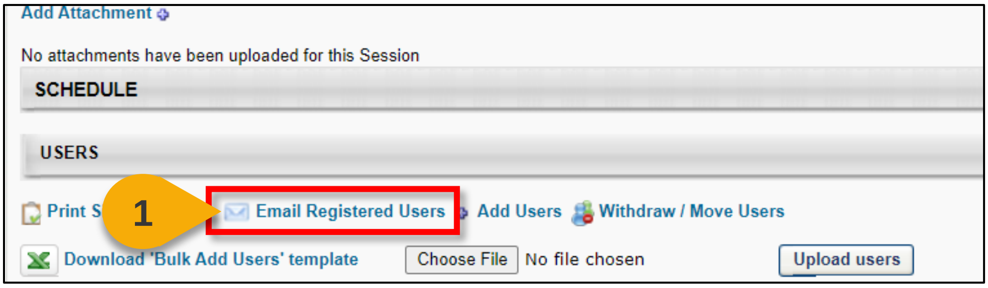
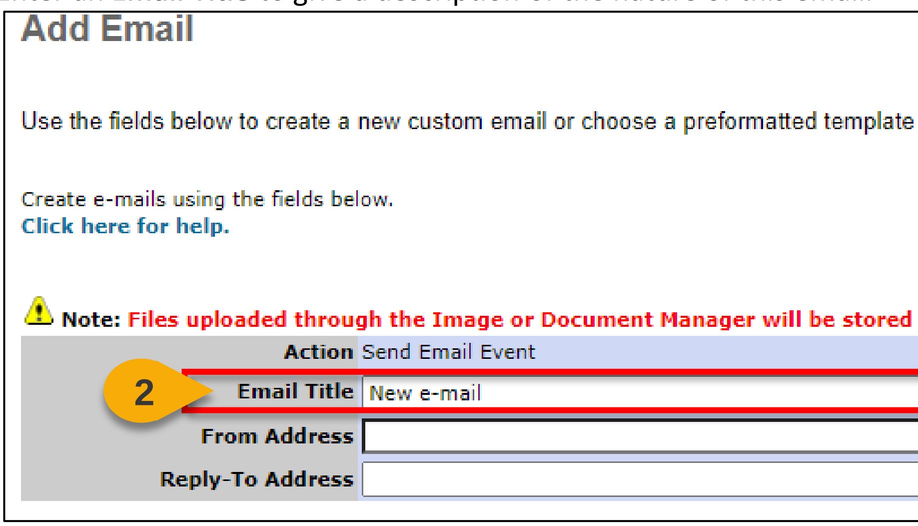
Send Emails from Roster

When you need to email students enrolled in a Session…

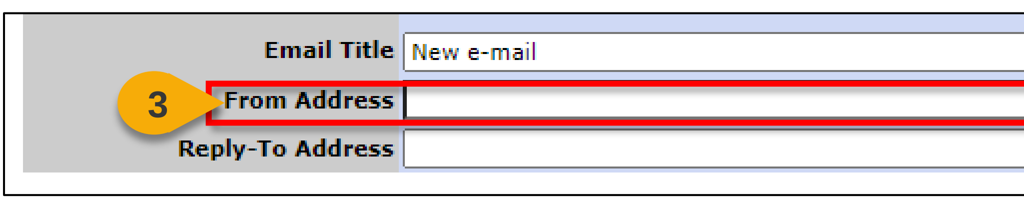
Step 1: Use the "View Session Roster" task aid to navigate to the Session Roster. From the Roster, click **Email Registered Users.**



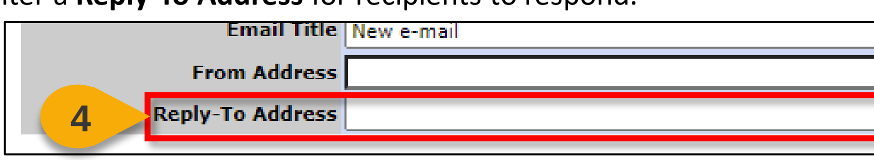
Step 2: Enter an **Email Title** to give a description of the nature of this email.



Step 3: Enter a **From Address**.

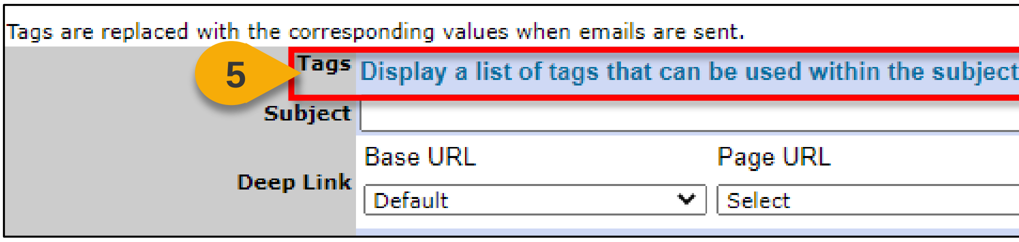


Step 4: Enter a **Reply-To Address** for recipients to respond.

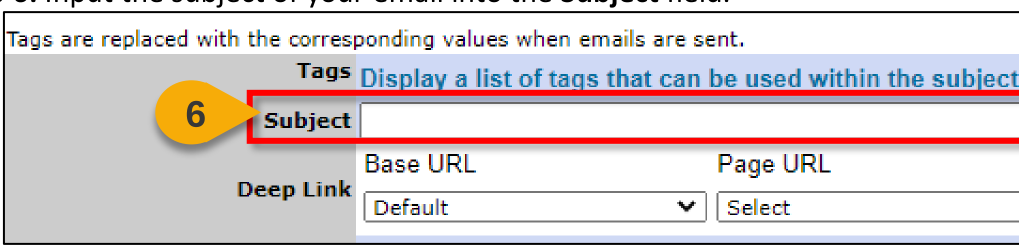


Send Emails from Roster (Cont. 1)

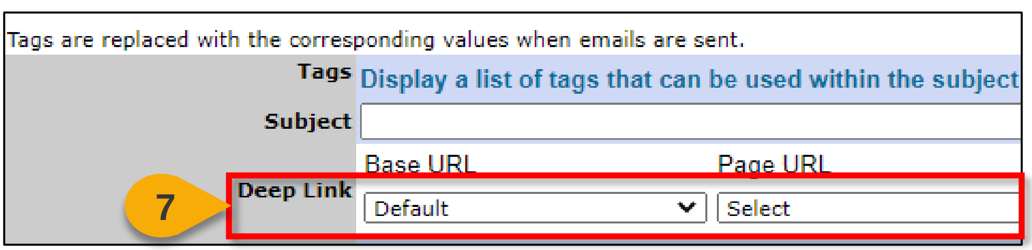
Step 5: Click **Display a list of tags that can be used within the subject** to show a list of available tags you can use in the Subject and Body of the email. If you decide to use tags, we recommend copying the tag directly from the menu and pasting it into the subject or body of the email.



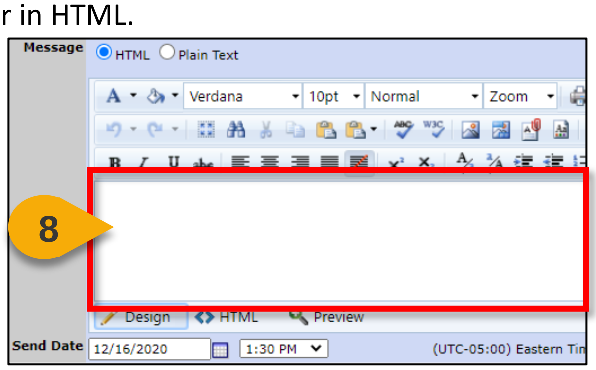
Step 6: Input the subject of your email into the **Subject** field.



Step 7: Use the **Deep Link** dropdown options to select a link to a page in CSOD.

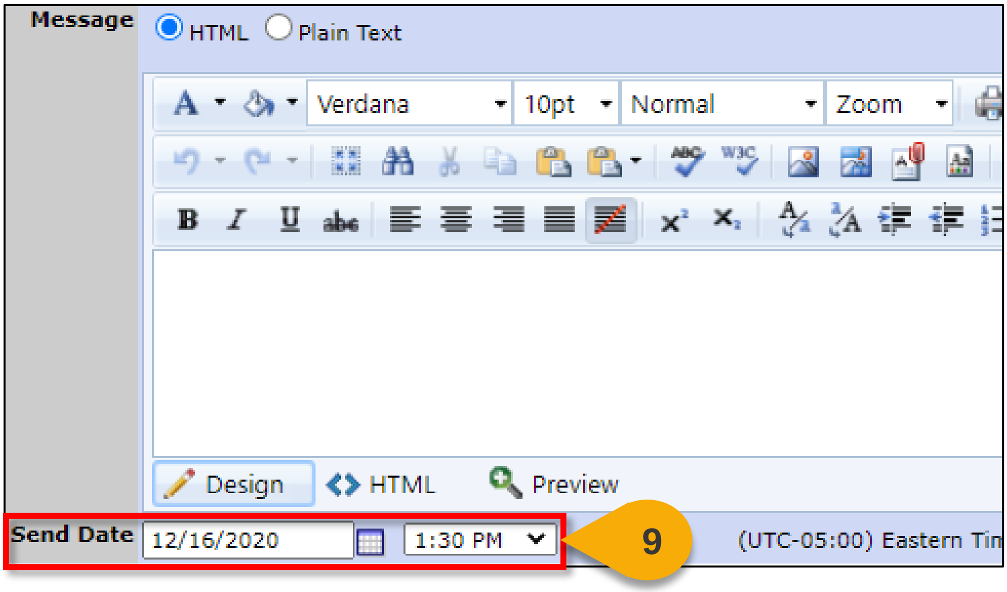


Step 8: Write the body of the email into the **Message field**. You can choose to send the email as Plain Text or in HTML.

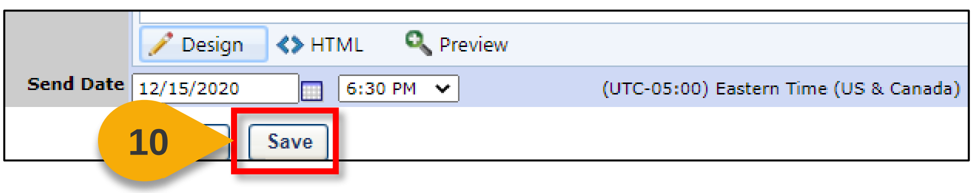


Send Emails from Roster (Cont. 2)

Step 9: Select a **Send Date.** This is the date and time at which the email will send.



Step 10: Click **Save** to send the email on the Send Date you selected..

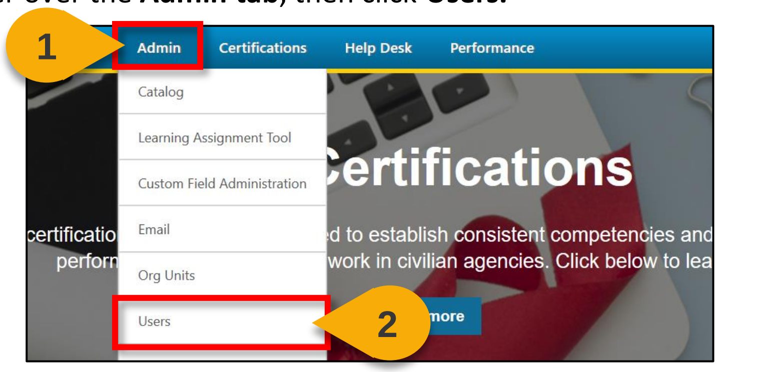


User Information

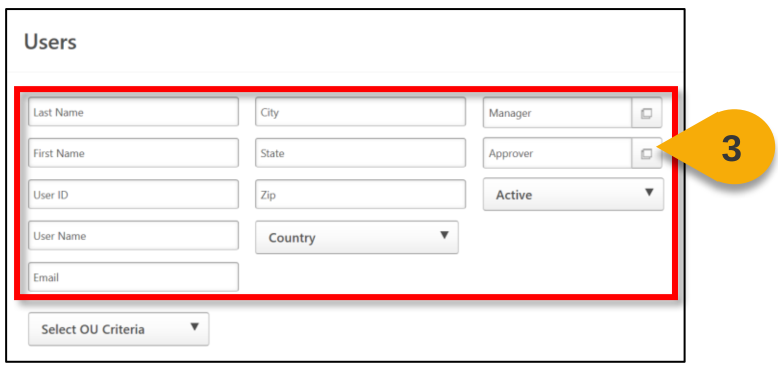
Search for a User

When you want to look up a User…

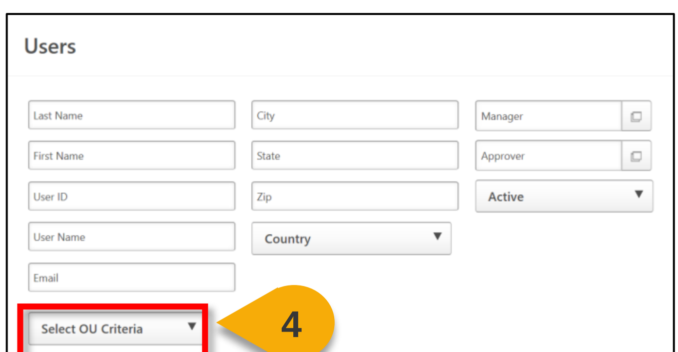
Steps 1 & 2: Hover over the **Admin tab**, then click **Users.**



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



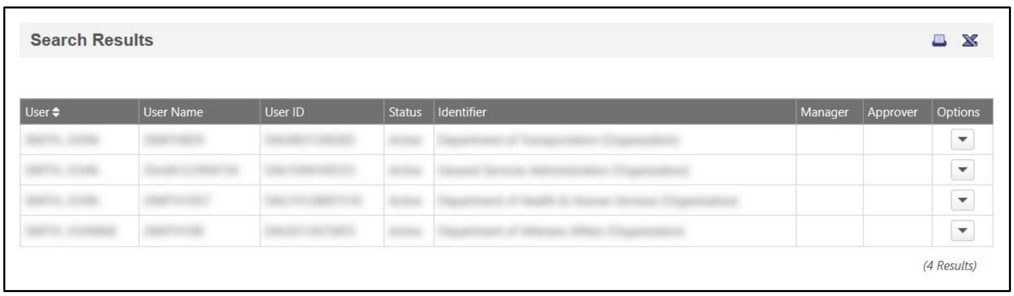
Step 4: Click on **Select OU Criteria** to further filter your search if desired. A **dropdown menu** will appear and allow you to select the OU type. The pop-out icon will then appear and allow you to select the OU.



Search for a User (Cont. 1)

Step 5: Hit **Enter** or click **Search.**

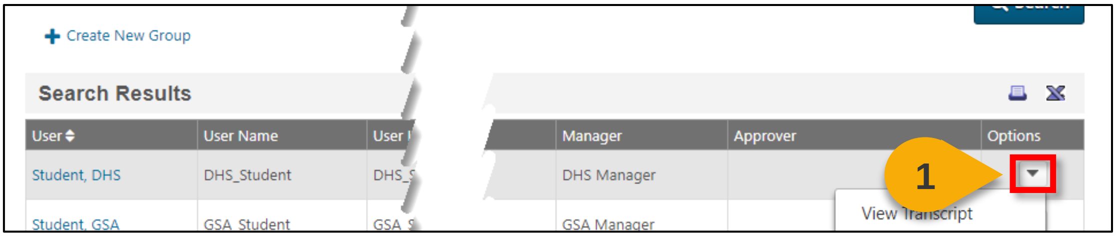
The search results will populate. From here, you can view the Transcript for the User. See the “View User’s Transcript” task aid for more information on how to perform this function.



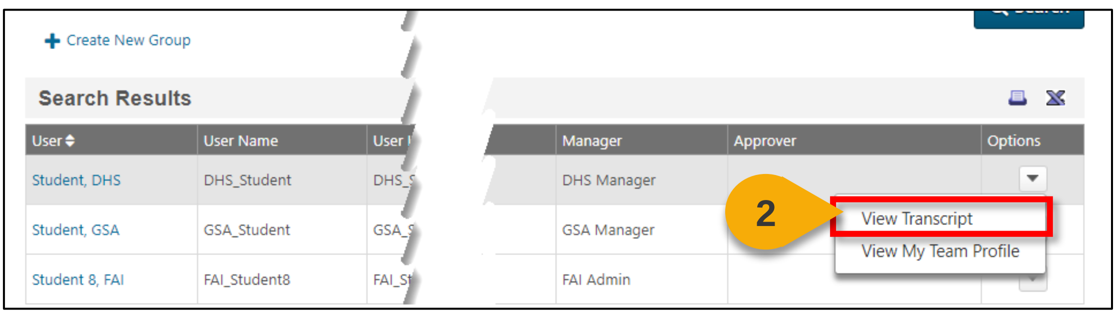
View User's Transcript

When you want to view a Transcript…

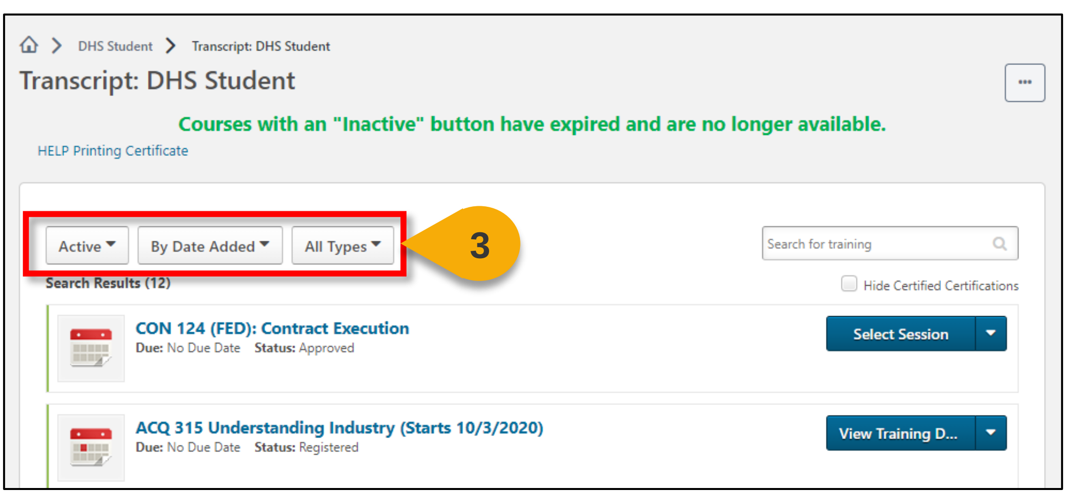
Step 1: Use the "Search for a User" task aid to find the User Record you wish to view. Click the **dropdown arrow** in the **Options column**.



Step 2: In the dropdown menu, select **View Transcript.**



Step 3: You will now see the **User's Transcript**. You can use the **filters** on this page to view items with a specific status or of a specific type. You can also change how your results are ordered. The default is set to order By Date Added.



Reports

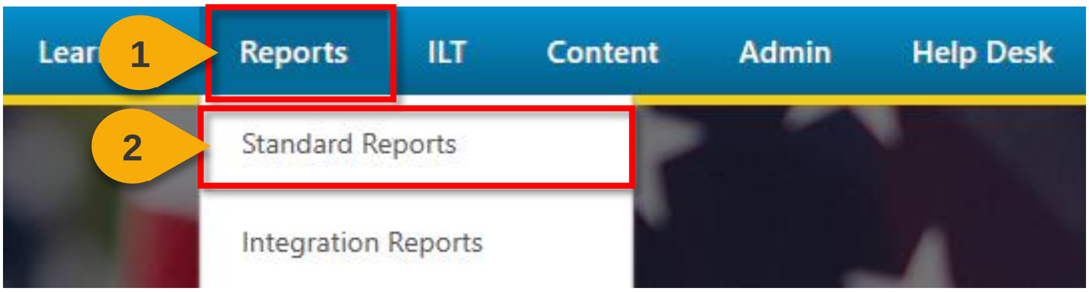
Standard Reports Available to Registrars:

- ILT Enrollment Summary Report
- ILT No Show Report
- Instructor Calendar Report
- Required/Suggested Training Report
- Transcript Status Report
- ILT Interest Tracking Report
- ILT Session Withdrawal Report
- Training Evaluation Report

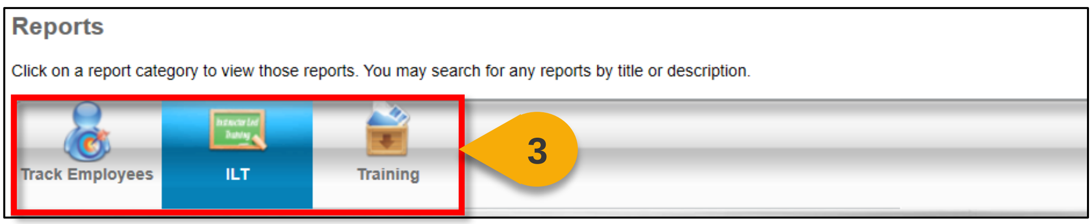
View Standard Reports

When you want to view Standard Reports…

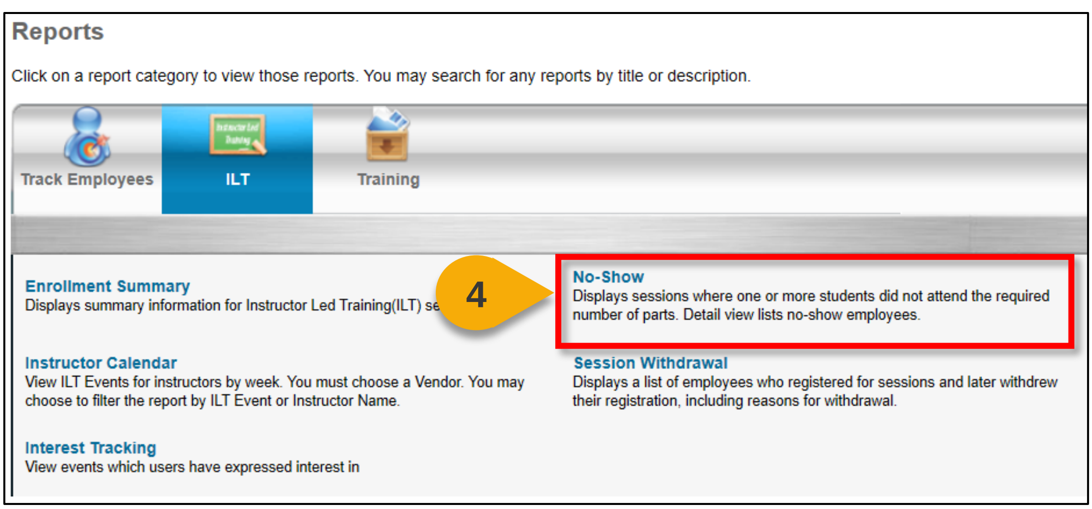
Steps 1 & 2: Hover over the **Reports tab**, then click **Standard Reports**.



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

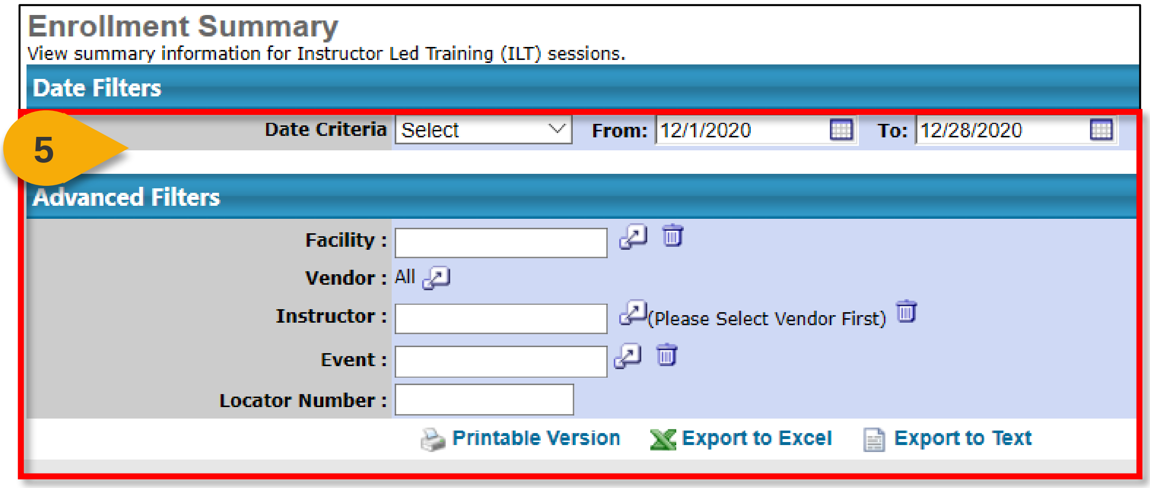


Step 4: Select the type of report you would like to view by clicking on the **name of the report**. The reports available to you will vary depending on your roles. See the previous page of this task aid for the minimum reports you should see for this role.

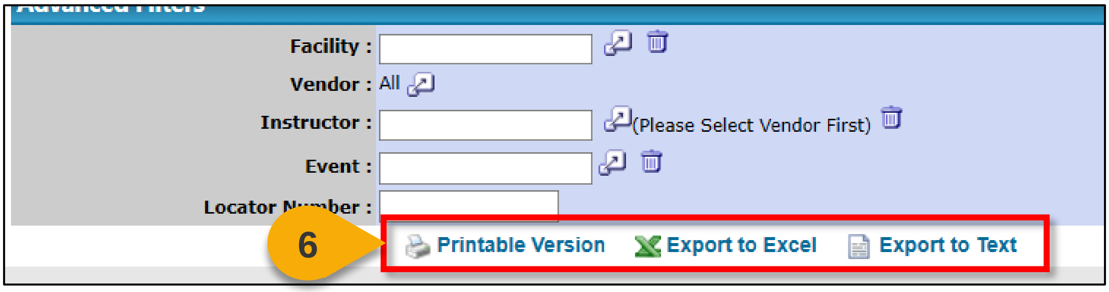


View Standard Reports (Cont. 1)

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. 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.

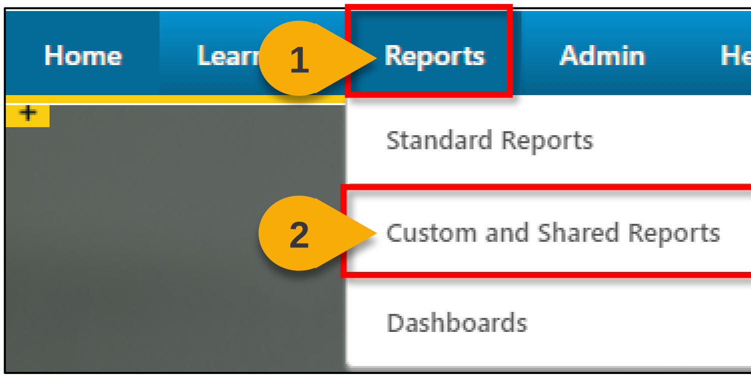


Note: You may receive an error message when trying to open the spreadsheet. If this happens, click “Yes” to open the file.

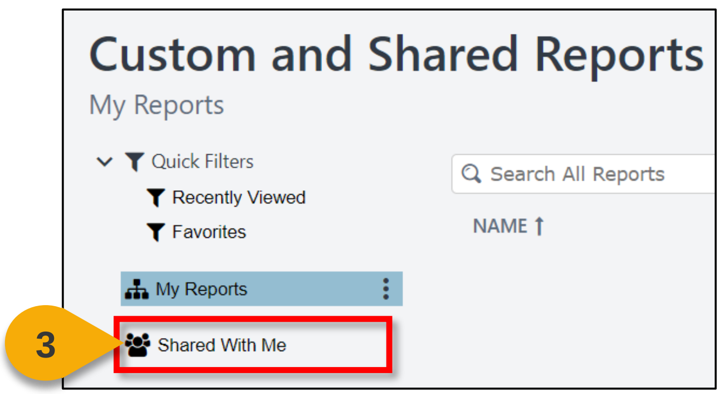
View and Download Custom Reports

When you want to filter and download a report…

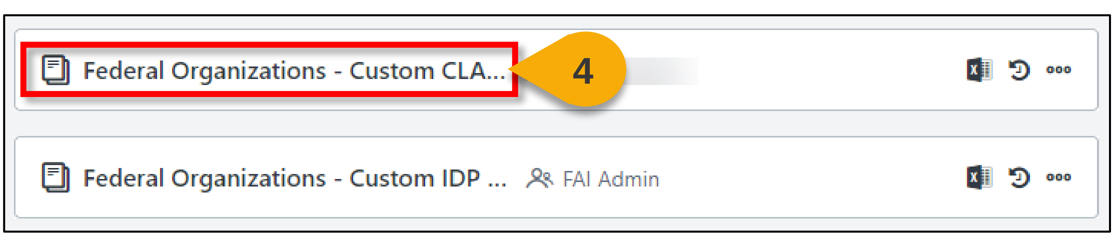
Steps 1 & 2: Hover over the **Reports tab**, then click **Custom and Shared Reports.**



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 would like to view to update the report filters.



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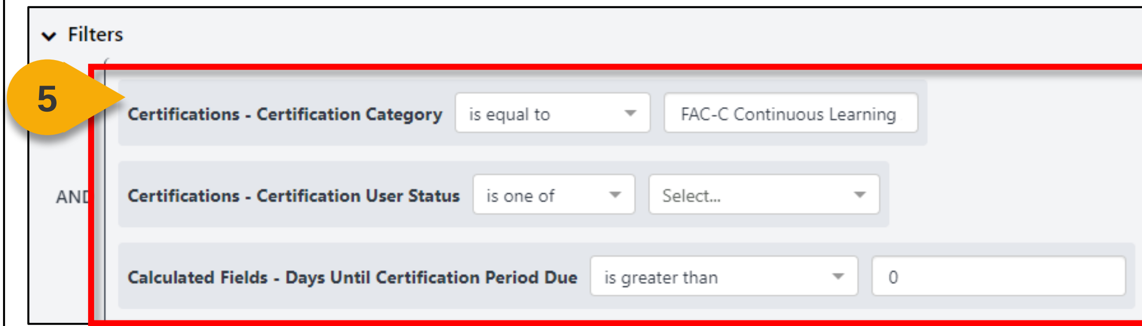
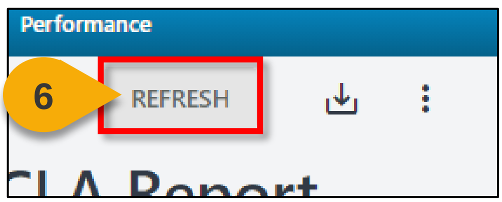
View and Download Custom Reports (Cont. 1)

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

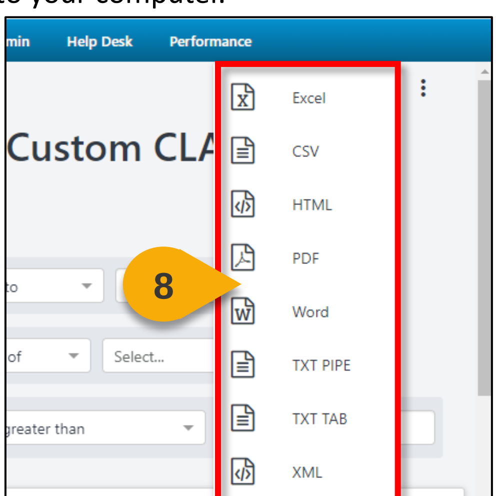


Step 6: Click **Refresh** in the top right corner to see a sample of the newly-filtered report, which will appear on the bottom portion of the page.



Step 7: Click the **Download Options icon** in the top right corner to see the formats available for this report.

Step 8: Choose the **File Format** in which you would like to download the report. The report will download to your computer.



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Additional Resources

Additional Resources

Support Area	Support Provided	Contact
Defense Acquisition University (DAU) Help Desk	• FAI CSOD System Questions and Issues • FAI CSOD System Errors and Troubleshooting • Password Issues and Resets	Email: DAUHelp@dau.edu Phone: (703) 805-3459, X1
Your Agency's Acquisition Career Manager (ACM)	• Agency-specific Acquisition Training, Certification, and Continuous Learning (CL) Requirements • Agency-specific Acquisition Policies and Procedures • Career Development • Training and Development Opportunities	https://www.fai.gov/humancapital/acquisition-career-manager-acm
FAI CSOD Training Materials and Online Resources	• Task Aids for FAI CSOD Roles • FAI CSOD Training Videos • Other Guidance for Performing Tasks in FAI CSOD	https://dau.csod.com/catalog/CustomPage.aspx?id=221000511 https://dau.csod.com/catalog/CustomPage.aspx?id=221000509
FAI Website FAQs	• FAI CSOD Migration • Acquisition Training • Federal Acquisition Certifications (FAC-C, FAC-COR, FAC-P/PM) • More!	https://www.fai.gov/page/migration-faitas-fai-cornerstone-ondemand-csod-faqs
FAI Staff	All other questions	faicsod@gsa.gov