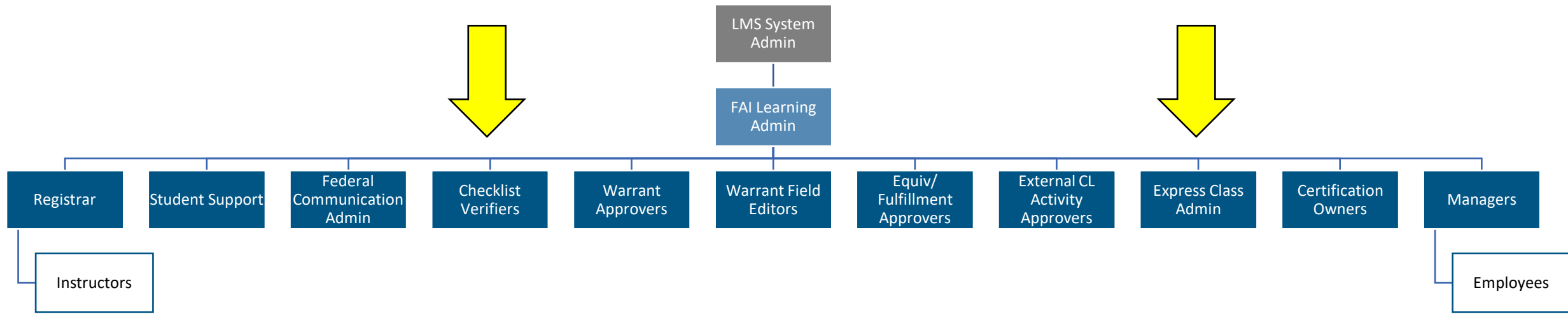# Agenda

- FAI CSOD Roles
  - Observation Checklist Verifier
  - Express Class Admin
- Additional Roles Available Now
  - Employee
  - Manager (Supervisor)
- Future Roles for Small Agencies
  - Equivalent/Fulfillment Approver
  - Student Support Admin
  - External Continuous Learning Activity Approver
- Role Change Request SmartSheet

FAI CSOD Roles

Observation Checklist Verifier Role

Who is an Observation Checklist Verifier?

Any FAI user who is responsible for verifying the education or experience of employees prior to obtaining a certification.

Agencies may implement their own unique certifications. Bureau personnel may be included in the list.

Approval Workflow for a Certification – Observation Checklist (Education, Experience)

- Employee > Education Verifier
- Employee > Experience Verifier

What can an Observation Checklist Verifier do?

- Approve education (transcript) observation checklist
- Approve experience (resume) observation checklist
- Search and view user's transcripts and bio pages (constrained to user's org and below)
- Run standard and shared custom reports

How to Review Checklist Approval Queues

DEMO

Follow along in the demo using the steps below to review Checklist Approval queues.

1   Navigate to the **Learning > Observation Checklists** link.

2   Use the **search filters** to find the User whose checklist you want to verify then click the **checklist title** in the Checklists column.

3   Click the **Attachments tab** then the **attachment name** to download the attachments provided by the user.

4   Click the **inverted triangle** to view the checklist requirements.

5   Determine if the User has met the requirements for this checklist. If not, click **Save** and reach out to the User. If yes, click the **checkbox** to the left of the checklist criteria and enter the **verification date**.

6   Select **1-Meets Criteria** in the Rating field.

7   Click **Save** and then **Back** to return to the Manage Observation Checklists page.

How to Review User Status in Queue

DEMO

Follow along in the demo using the steps below to view Custom Reports.

1 Navigate to the **Reports > Custom and Shared Reports** link.

2 Click **Shared With Me**.

3 Search for **Federal Observation Checklist Report** and click on the **Report title**.

4 Make changes to the **filters** as needed and click **Refresh** to update your results**.**

5 To download immediately, click the **Schedule for now icon.**

6 Click the **Download your report icon**.

7 Click on the **generated report** and then your preferred **File Format**. The report will download to your computer.

Express Class Admin Role

Who is an Express Class Admin?

Any FAI user (Gov or Contractor) who is responsible for adding Express Class materials and marking completions for Express Class users.

Each Agency may identify users for the Express Class Admin role. Bureau personnel may be included in the list.

What can an Express Class Admin Role do?

- View user's transcript

- Create Express Class materials

- Add users to Express Classes

- Mark completions for Express Classes

- Run standard and shared custom reports

Express Class Creation Process

Create Material 1
- Express Class Admin creates a Material for the Express Class and enters number of CLPs.

Add Users 2
- Express Class Admin adds users manually or via CSV load to the Express Class.

Mark Completions 3
- Express Class Admin marks the User as "Complete" for the Express Class.
- The completion shows on the User's transcript within 10 minutes.

Express Classes in CSOD

WHAT ARE EXPRESS CLASSES?

Express Classes are agency-sponsored informal training events that students attend, such as brown-bag meetings to share acquisition knowledge. They cannot be used as part of a certification but can provide CLPs.

WHY ARE EXPRESS CLASSES IMPORTANT?

Express Classes provide Express Class Admin the ability to quickly and easily create, document, and give transcript credit to students for informal training.

HOW DO WE PROCESS EXPRESS CLASSES?

- Express Class Admin create a material for the Express Class.
- Express Class Admin add users to the class.
- Express Class Admin mark completions for the class.

How to Create an Express Class Material

FAI

Create Material 1

DEMO

Follow along with the demo using the steps below to create an Express Class Material.

① Navigate to the **Admin > Catalog** link.

② Click **Materials** and then **Create Material**.

③ Type the name of the Express Class in the **Title** field.

④ Set the **Material Type (Express Class)** and **Provider (Federal – Express Class)**.

⑤ Enter the appropriate number of **Continuous Learning Points (CLPs)**.

⑥ Leave the **Availability blank** and select **No Emails**.

⑦ Click **Save**.

Question Corner

How should I name the Express Class?
The recommended naming convention is, "FEX - Agency And Bureau – Fiscal Year - ID#: Express Class Title."

What happens if I do not put anything in for CLPs?
If you skip adding CLPs, Users added to this Express Class will not receive CLPs upon completion.

Related Task Aid
- Create Express Class Material

How to Add Users Manually to Express Classes

DEMO

Follow along with the demo using the steps below to manually add Users to Express Classes.

1. Navigate to the **Learning > Express Class** link.

2. Click **Search Existing Training** and **search** for the Express Class Material you just created.

3. Click the **title** of the Express Class and update the **Completion Time** fields.

4. Click **Add Attendees** and type the **name of the User** you would like to add in the Search box.

5. Click the **check box** next to the appropriate User's name. **Repeat** until all necessary Users are checked and appear in the **Selected tab**.

6. Click **Save** and then **Record** for each user to update their Completion status.

7. Review the Summary page then click **Submit**. A pop-up will let you know the Express Class was successfully added.

Question Corner
Can I update all the of Users' completion statuses at once?
Yes, you can click the Select All button and then Bulk Record to update all Users' status at once.

How long does it take for the class to appear on a User's transcript?
It will take up to 10 minutes for the completion to show on the User's transcript.

Related Task Aids
•Add Users to Existing Express Class

How to Add Users via CSV to Express Classes

DEMO

Follow along in the demo using the steps below to add users via a CSV load to Express Classes.

1 Navigate to the **Learning > Express Class** link.

2 Click **Search Existing Training** and **search** for the Express Class Material you just created.

3 Click the **title** of the Express Class and update the **Completion Time** fields.

4 Click **Select File** under the Upload Attendees section.

5 Select the **.CSV file** you want to upload and click **Open**.

6 Users should be marked Complete after upload. If you need to change a User's status, click **Record** next to their name to do so.

7 Review the Summary page then click **Submit**. A pop-up will let you know the Express Class was successfully added.

Question Corner

I am getting errors when uploading my file. What do I do?
Refer to the *Create an Express Class CSV File* Task Aid for further instruction on common errors.

How do I indicate different User statuses in my CSV file?
In Column B, enter a 1 to mark users as Complete, a 2 to mark Fail, and a 0 to mark Incomplete.

Related Task Aids
• Add Users to Existing Express Class
• Create an Express Class CSV File

How to View Custom Reports

DEMO

Follow along in the demo using the steps below to view Custom Reports.

1 Navigate to the **Reports > Custom and Shared Reports** link.

2 Click **Shared With Me**.

3 Search for the **Federal Express Class Report** and click on the **Report title**.

4 Make changes to the filters as needed and click **Refresh** to update your results**.**

5 To download immediately, click the **Schedule for now icon.**

6 Click the **Download your report icon**.

7 Click on the **generated report** and then your preferred **File Format**. The report will download to your computer.

Related Task Aids
- View and Download Custom Reports
- Custom Report FAQs

Reports Covered Today
- Federal Express Class Report

Express Class Custom Report

What It Is

Report Name	Shared With	Summary
Federal Express Class Report	Federal Express Class Admin Federal Student Support Federal Learning Admins	Shows information about which users have Express Class entries on their transcript.

How To Run It

Filter Name	Recommended Operator	Recommended Selection
Transcript Status	Is one of	Complete, Incomplete, and/or Failed Note: You will almost always use "Complete"
User Organization	Is one of OR Is not null	Relevant agency or agencies (Examples: Your organization and below, your agency and below, Federal Organizations and below)
Training Title	Contains OR Is not null OR Is One Of	Relevant training title If using "Is One Of", confirm exact title wording before searching Note: This filter is optional
Transcript – Latest Registration Number?	Is	Select Yes to only see the latest completion a user has on their transcript. To see previous completions for the same Express Class, select No.

Tips for Express Class & Checklist Verifiers

- If you accidentally provide a user with Express Class credit, you will need to submit a DAU Helpdesk ticket for assistance with the Express Class removal.

- When conducting activities that you plan to enter as an Express Class, we recommend not providing a completion certification and letting users know they should not submit the activity as an External Continuous Learning Request.

- Currently, no notifications are fired from CSOD for Express Class. It is a best practice to email users after you provide Express Class completion to let them know.

- If you accidentally approve a checklist, you will need to submit a DAU Helpdesk ticket for assistance with next steps.

To request either of these roles, submit the FAI SmartSheet.
https://app.smartsheetgov.com/b/form/c58913b5d0ab4270b193e2da56b755f7

Additional Roles Available Now

Employee Role

Who is an employee?
All FAI users, regardless of other roles

What Can Employees Do?

- View own user profile and transcript

- Submit change to user profile (no approval workflow)

- Create IDP (From scratch or from templates)

- Register and begin DAU or Federal OLTs (no approval workflow)

- View and request a Federal ILT training session (approval workflow)
    - Receive Register/Waitlist notification
    - Submit Equivalent Course Request to satisfy pre-requisition (approval workflow)

- View status in assigned/selected Federal Acquisition Certification
    - Submit Education Observation Checklist (approval workflow)
    - Submit Experience Observation Checklist (approval workflow)
    - Submit External CL Activity Request for CLPs (approval workflow)

- Register for a Certification

- View status in dynamically assigned Continuous Learning Certification
    - Submit CLPs for completed external training (approval workflow)

- Submit Warrant (approval workflow)

Manager (Supervisor) Role

Who is a Manager?
Dynamic Assignment – Identified when a FAI user selects their Manager in CSOD

Does not approve/deny:

- Changes in employee's profile (grade, job series, assigned manager, AWF, COR)

- Equivalent Course Request

- Request for External Training (outside a Certification)

- Request for CLPs from completed External CL Activity Requests

What Can Managers Do?

- View their Team

- View employee's user profile and transcript

- Assign IDP to employee

- Approve IDP

- Assign ILT Event to employee (Employee selects session)

- Assign employee a Federal Acquisition Certification
    - View employee's status in Federal Acquisition Certification

- View employee's status in Continuous Learning Certification

- Approve/deny employee's request for Warrant (some agencies)

- Run standard and shared custom reports

Future Roles for Small Agencies

Equivalent/Fulfillment Approver Role

Who is an Equivalent/Fulfillment Approver?
Any FAI User who is responsible for approving the addition of external equivalent courses for users

The Agency determined if they want to implement a 1-step or 2-step approval process. Bureau personnel may be included in the list.

Approval Workflow for an Equivalent Course Credit/Fulfillment Credit Request

- Employee > EQ Approver Group #1 > EQ Approver Group #2 (optional)

What can an Equivalent/Fulfillment Approver do?

- Approve/deny employee's request for credit an External course that is equivalent to a FAI Course

- Approve/deny employee's request to use their job experience as equivalent to a FAI Course

- Run standard and shared custom reports

Student Support Admin Role

Who is a Student Support Admin?
Any FAI user (Gov or Contractor) who is responsible for viewing employee user profiles, transcripts and running reports.

Each Agency may identify users for the Student Support role. Bureau personnel may be included in the list.

What can a Student Support Admin Role do?

- Constrained to Admin's organization and sub organization

- Search and view user profiles

- View user's transcript for registration status in a classroom course

- View user's status in an online course

- Update user's organization

- Run standard and shared custom reports

External CL Activity Approver Role

Who is an External CL Activity Approver?

Any FAI user (Gov or Contractor) who is responsible for approving/denying External CL Activity Requests.

Each Agency may identify users for the External CL Activity Approver role. Bureau personnel may be included in the list.

What can an External CL Activity Approver do?

- Constrained to Admin's organization and sub organization

- View user's transcript

- Approve/Deny External CL Activity Requests

- Edit CLPs for External CL Activity Requests prior to approval

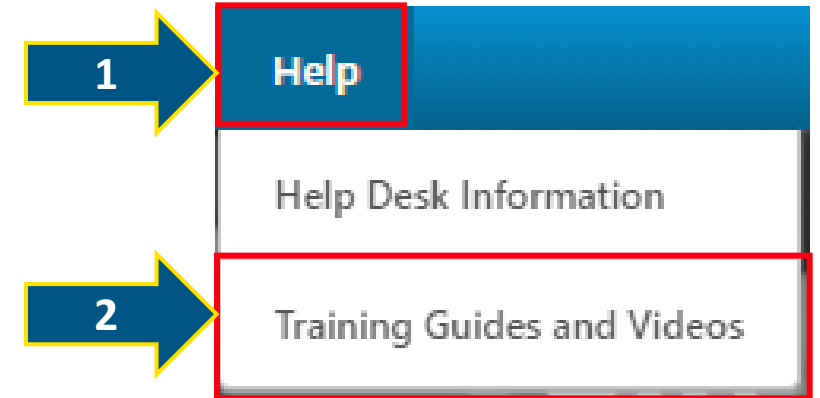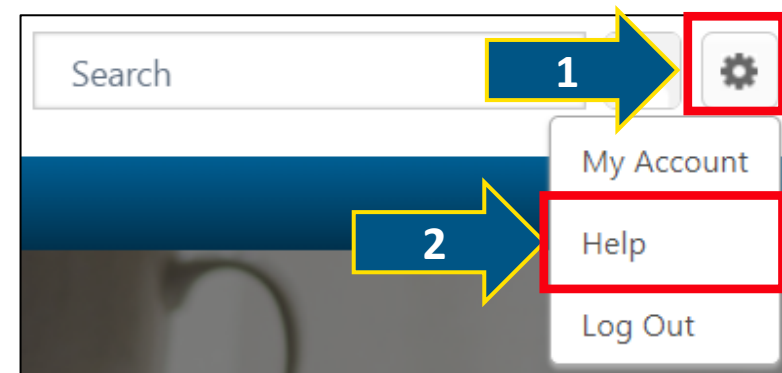- Run standard and shared custom reports

Resources

Resources

Access and review the Checklist Verifier and Express Class Admin Task Aids by navigating to the Training Guides and Videos page.

Hungry for more? You can also access the CSOD online help page for support with the page you are currently viewing in CSOD.

Glossary

- **Certifications**: Certifications enable organizations to create and manage internal and external certifications.

- **Observation Checklists**: Checklists are communication tools which allow users to submit documentation for checklist verifiers to "check," or verify, that students met requirements towards Certifications.

- **Express Class**: Express Classes are agency-sponsored informal training activities that students attend. They cannot be used as part of a certification.

- **Material**: Materials are a training type that administrators can create and manage. Existing materials can be assigned to users, or users can request the materials for their transcript.

Help Desk Support

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	Commercial: 703-805-3459; Option 1 Toll Free: 1-866-568-6924, Option 1 DSN: 655-3459; Option 1 https://services.dau.edu/psp?id=public_portal
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=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/fai-cornerstone-ondemand-csod-faqs#latestInfo

Role Change Request SmartSheet

- Small Agency Representatives (SAR) may submit one request to assign/remove one User to/from one system role at a time.

- Role change requests may only be submitted by the Small Agency Representatives. FAI will not review requests submitted by anyone other than the SARs.

- Role Change Request SmartSheet - https://app.smartsheetgov.com/b/form/c58913b5d0ab4270b193e2da56b755f7