FAITAS Release Notes

This document lists changes to FAITAS as released into use starting with Release 5. A brief description will be provided with each change/fix. Please consult the user guides and frequently asked questions (FAQs) for further information or specific help with a function.

The following bullets are used to indicate:

* Asterisk equates to “Changed.”

+ Plus sign equates to “Added.”

- Minus sign equates to “Removed.”

**Release 15.5.1 October 25, 2019**

+* Previously, Warrant Managers running Agency and Bureau reports could only view warrants associated with their respective bureau and/or agency. This previously did not allow these warrant managers to view warrants for personnel which had since left their agency.

User Impact: Warrant Managers running agency and bureau warrant reports will now be able to view the historical warrant records of warrant holders who have since left the respective bureau and/or agency assigned.

**Release 15.5 July 31, 2019**

- Search for Training function removed
  
o Previously in FAITAS, the Manage Career | Training | Search for Training option was the only available to search and register for training. In 2016, the FAITAS Course Catalog provided a user-friendly course registration experience with many new features. To allow for agency and FAI documentation updates, both views remained in within FAITAS. However, the search for training view has now been removed and all course and class searches are now exclusively performed using the Course Catalog, accessed via Manage Career | Training | Course Catalog or through the Course Catalog button in the My Current Training widget on the Dashboard.
Release 15.4 February 26, 2019

* Continuous Learning Update – Manage Lapsed CL Period
  o Previously, the Agency Continuous Learning Manager (ACLM) could not assist FAC-C or FAC-COR holders who were approved via federal or agency policy to complete training after their CL Period end date. This feature was only available to ACLMs to manage lapsable certifications, such as FAC-P/PM and Agency Specific Certification holders. This release changed the ability for ACLM to designate CLPs to a previous CL period while in the administrative grace period (i.e. an expired state).
  o User Impact: Users in the administrative grace period (14 days) may now be brought from Expired into a Current state at the discretion of the ACLM and their agency’s policy. ACLMs may now designate CLPs before the CL end date, bring a expired CL Period into a Current status, and approve the achievement request for the user’s expired CL Period to display currency. Business Rules by certification program and designated type will remain the same and Revoke or Lapse, as appropriate, after the administrative grace period has concluded.

Release 15.3 September 19, 2018

* Course Terminology Updated: Classroom to Instructor-Led Training
  o Previously in FAITAS, all courses could be described as Classroom or Online. System has been updated to accommodate the new trending format for training across the government, Virtual and Classroom Instructor-Led Training (cILT and vILT).
  o User Impact: Users will now be able to filter for Online (asynchronous) or Instructor Led Training (synchronous) within the course catalog.

* Course Tile Verbiage Removed: This is a ________ Course
  o Previously in FAITAS, all courses were shown either ‘This is a Web Based Course’ or ‘This is a Classroom based Course’ when completing the registration process. As the ‘FCL’ courses are no longer only webinars and can be simply Agency-Specific courses, the terminology ‘This is a Web Based Course’ has been removed. As the format for Asynchronous training can now be held both in the classroom and virtually, ‘This is a Classroom based Course’ has been removed. The Course tiles will display the terminology ‘Instructor-Led Training’ or ‘Online Training’ to match terminology put in place by FAI for consistency.
  o User Impact: Students will now be presented with the consistent terminology which has been put in place by FAI to avoid verbiage confusion during the course registration process.

* Certification | Manually Revoked Business Rule Update
  o Previously in FAITAS, if an Agency Certification Manager Revokes a certification record for a higher level because it was entered in error, a lower level certification cannot be Re-established. Business rules have been updated to allow the Establishment of a lower level CL period when a certification of a higher level is manually revoked in FAITAS.
  o User Impact: Users will now be able to maintain lower level certifications within FAITAS when an invalid higher lever certification has been manually revoked.
Account | Password Reset

- Previously in FAITAS, users could reset their account password after verifying account ownership by correctly answering established security questions. Updated system to provide alternate account verification process utilizing information in a user’s FAITAS Profile.
- User Impact: For the password reset process, users may now choose between entering the answers to their security questions or entering the last four digits of their social security number (SSN) and their date of birth (DOB). Users have a total of three attempts to validate their account and receive the password reset link; the three attempts may be any combination of the two account validation options. If a user is unsuccessful with the account validation process, he/she will need to call the FAI Customer Service Support (CSS) team to complete the account validation process and have a password reset link sent to their email account of record within FAITAS.

Account | Automatic Role Removal with Agency and/or Bureau Change

- FAITAS is a role-based system. Previously, the responsibility of Agency and Bureau role management for an Agency lied solely with those assigned the Agency Administrator role, and this responsibility was inclusive of role removal management upon Agency/Bureau Change and account deactivation. System updated to automate role(s) removal when a user saves Agency/Bureau changes within his/her FAITAS Profile, or upon account deactivation.
- User Impact: Users are now warned of Agency and Bureau change selections as well as system roles, which will be removed when making Agency/Bureau updates within their FAITAS Profile; changes go into effect and roles are removed once changes are saved within their profile. An agency change, or account deactivation will remove all assigned system roles to include the Supervisor role. A bureau change will remove bureau-level roles. Users whose supervisor changes agency or whose account is deactivated will receive a system-generate email regarding the need to select a new supervisor. User will be alerted to select a new supervisor within FAITAS upon next login, and the selected supervisor must accept the Supervisor Request before the user may submit any new requests within the system. Upon Approval, all other Supervisor Pending requests (Training, Certification, CL, Warrant, F/E) will be rerouted to the newly selected supervisor.

Navigation | Menu and Account Management Updates

- Previously in FAITAS, access to Account, Profile, Contingency Contracting Corps, Acquisition Program Assignments and Supervisor Requests were accessed under the “My Status” menu option. Updated menu navigation to be more intuitive and provide direct access to frequently requested account management tasks. Menu header renamed “My Account” with direct access to update Supervisor, Password, Profile, Security Questions, and Email address. Contingency Contracting Corps and Acquisition Program Assignments relocated to the menu options under “Manage Career”, and Supervisor Requests relocated under the menu header “Manage Employees”. Added dedicated Password, Supervisor, and Email update views.
- User Impact: Users can easily navigate to specific account management functions. Password update view contains enhanced requirements guidance and the option to view/hide the entered password. Supervisor selection can now be updated on its own view as well as within the Profile,
and users may update the email address associated with their FAITAS account on a dedicated view. Users may apply for the Contingency Contracting Corps and manage their Acquisition Program Assignments through menu options under “Manage Career”. Supervisors now access Supervisor Requests under the “Manage Employees” menu option.

* AHCP | FY17 Questionnaire Updates
  - The Annual Acquisition Human Capital Plan (AHCP) is submitted through FAITAS. Section II of the reporting questionnaire for the fiscal year 2017 (FY17) updated to reflect new required data points.
  - User Impact: AHCP reviewers will need to provide additional data points and the data sources used to generate those points.

**UPGRADE: 30 NOVEMBER 2017**

* Reports | FAITAS Reports Engine Upgrade
  - Upgraded the report engine within the FAITAS environment to facilitate better browser and Excel compatibility.
  - User Impact: Report access will remain the same as before the upgrade; however, there are slight interface changes. The reports view will default to display system messages. Associated reports will load each time a subject tab is selected. Report selection now requires a double click on the report title within the Available Reports folder to load the Report Options.

**RELEASE 14.14 OCTOBER 2, 2017**

* CL | System Assignment of CLPs for AWCS Completion
  - Enhanced system to allow CLP award upon completion of the Acquisition Workforce Competency Survey, who have a current Certification within FAITAS
  - User Impact: None. User automatically awarded point for AWCS completion. Eliminated user’s need to submit CLP request and require supervisor approval upon completion of the survey.

*Registrar | Management of Web Based Course Offerings In FAITAS
  - Previously in FAITAS, all Agencies created offerings as one type of class. System updated to allow management of Web-Based Class Offers to include: Users to cancel training requests, registrars to manage web-based offering training applications, and registrars to pull roster reports for web-based offerings.
  - User Impact: Management of Web-Based offerings now available within FAITAS.

**RELEASE 14.13 AUGUST 2, 2017**

* Help | Quick Start Guide Update
  - Previously in FAITAS, the Help | User Guides | Quick Start Guides page was a list of help guides and videos grouped by main system functionality. It was not always intuitive which help items
were guides and which were videos, nor how to navigate the help page. Quick start guide page updated to include a navigation screen with icons, provide details regarding the help guide or video, and an always present up arrow in the bottom right hand corner that can return one to the top of the help page. Additionally, quick start guides reformatted to contain targeted content by system functionality and access permissions within the system.

- **User Impact:** Depending upon system permissions, users now have access up to six main help topic areas: Account Management; Training; Certification, Continuous Learning, and Warrant; Reports; Acquisition Human Capital Plan; and FAITAS Administration. Within each help topic, the available Quick Start Guides and help videos are presented with a summary about the help item and indicate the guide’s file format or the video’s length. Users many now return to the top of the Help page by clicking the up arrow in the bottom right corner of the screen. At the top of the page, users may access other help topics from the link navigation under the “FAITAS Guides” title, or above the “FAITAS Guides” page title, they may choose to click the breadcrumb navigation “Back to Category Selection” to return to the original, large icon, help topic navigation view.

**RELEASE 14.12 JUNE 10, 2017**

* FAITAS LMS Moodle Upgrade
  - **User Impact:** None

**RELEASE 14.11 MAY 24, 2017**

*User Look Up Feature Update
  - Previously in FAITAS, Manager and Admin roles could search for users and all results for the entered parameters were returned. System updated to provide results up to a certain threshold with the initial threshold set at 75. This update will decrease time required to generate search results.
  - **User Impact:** Searches for common names will be faster. Employee Search users will only return up to 75 results for the entered parameters. If the desired Employee is not in the returned results, the Manager or Admin will need to refine the search to be more specific.

+ **FAITAS User Metrics: Digital Analytics Program**
  - Previously in FAITAS, usage metrics was limited to active account holder reports, and the business tool analytics access dashboard. FAITAS now incorporates the Digital Analytics Program (DAP), which is a service provided by GSA to all federal executive agencies and their websites. Utilizing the Google Analytics framework, DAP offers analytics for such metrics as number of page views, unique users, mobile vs. desktop visits, average time on page, etc. For more information on DAP, please visit [https://www.digitalgov.gov/services/dap/](https://www.digitalgov.gov/services/dap/).
  - **User Impact:** Anonymized data is collected on FAITAS usage.

* **FAC-COR Certification Training Requirements Update**
Previously in FAITAS, the training requirements for the FAC-COR certification reflected older options for training to meet the FAC-COR program competencies. System updated to reflect current training requirement options; however, applicants should always check with their Agency before applying to confirm Agency specific requirements.

User Impact: None.

**RELEASE 14.10 MARCH 22, 2017**

-Historical Certification Workflow Management

-Previously in FAITAS, Agency Admins were only able to update and manage current certification workflows within FAITAS for their Agency. The certification workflow configuration functionality now improved to allow management of historical certification workflows, previously set up by Agency Administrators.

-User Impact: Agency Administrator and System Admin User Roles now have the ability to manage historical certification workflows and reviewer assignments, by agency/bureau, if any pending certification requests are present in the designated workflow for management.

**RELEASE 14.9 FEBRUARY 9, 2017**

-Acquisition Training and Development Management

-Previously in FAITAS, through the Career Path Management functionality, users were able to create an Individual Development Plan (IDP) only with courses managed within FAITAS. Module refreshed to improve end user experience, allow a wider range of training and development activities, and to automate Certification Program updates; module rebranded to Acquisition Training and Development Management (ATDM). System updated to allow Individual Training and Development Plans (ITDPs) and Master Training and Development Plans (MTDP) to include FAITAS managed courses, Agency/Bureau Acquisition Training, Other Activities, Certification Program subscriptions and MTDP subscriptions within an ITDP. System updated with subscriptions to provide notification to subscribers of changes to MTDPs and Certification Programs.

-User Impact: FAITAS users create a new ITDP as previous IDPs are retired. Supervisors may create an ITDP on behalf of their employee(s); however, the employee will need to concur with all edits before the ITDP is approved. Agency Training Plan Managers may create and manage an Agency Acquisition Training List; items on the list are available for inclusion in MTDPs and ITDPs. Agency Training Plan Managers may create and maintain Agency MTDPs and include Certification Program subscription requirement(s) as well as specific Agency required training and development items to the plan(s). Bureau Training Plan Managers may create and manage a Bureau Acquisition Training List; items on the list are available for inclusion in MTDPs and ITDPs. Bureau Training Plan Managers may create and maintain Bureau MTDPs and include Certification Program subscription requirement(s) as well as specific Bureau required training and development items to the plan(s).

-Certification: Certification Certificate Access Update
Previously in FAITAS, when a User was awarded a higher-level certification, the User could still access the certification certificates of lower level certifications within their FAITAS History. System updated to allow view/print access to only the highest-level certification awarded for a certification program.

User Impact: FAITAS certification holders may only view/print the certification certificate of the highest-level certification awarded within a certification program.

Continuous Learning: Processing Queue Update

Previously, Supervisors and Bureau Continuous Learning Managers (BCLM) were unable to view a requestor’s sub-bureau designation within the request queues. System updated to allow inclusion of a Sub Bureau Column in the Continuous Learning Point Requests and Continuous Learning Achievement Request queues.

User Impact: Supervisors and BCLMs may choose to display a Sub Bureau Column. The queue can be sorted by Sub Bureau by clicking on the Sub Bureau column header.

Reports: Warrant Detail Report Update

Report updated to include Appointment Date data.

Warrant: Employee Brief

Previously in FAITAS, Warrant Reviewers did not have access to an applicant’s FAITAS Training, Certification, Continuous Learning, and Warrant histories; this led to occasional duplicate warrant actions. System updated to provide Employee Brief access on the Warrant Invitation and directly within the Warrant Request. The Employee brief provides Profile highlights, Warrant History, Certification History to include Continuous Learning status of the certification, as well as Training graduations. Access to the applicant’s full FAITAS histories is available through the Employee Brief; however, accessing the full histories will take the Warrant Reviewer out of the Warrant Invitation or Request.

User Impact: Warrant Reviewers and Approvers may now view an applicant’s Warrant, Certification, and Training graduations histories directly within the Warrant Request.

Warrant: Approver Titles for SF 1402

Previously in FAITAS, the Standard From (SF) 1402 would print with the Warrant Approver’s uploaded signature but not a title. System updated to allow Title management and to display a chosen title on the SF 1402. The SF 1402 will display the uploaded signature and Title selected by the Warrant Approver at the time the SF 1402 is generated. SF 1402 will not display a title if a) Warrant Approver does not choose a title; b) Agency Warrant Manager (AWM) deletes a Title currently selected by a Warrant Approver; or c) warrant was manually added or uploaded as these warrants do not display a Signature or Title.

User Impact: AWM maintains a list of Titles for Warrant Approvers used within the Agency. Warrant Approvers may choose a Title to display on all SF 1402s they have approved.
Warrant: SF 1402 Configuration

- Previously in FAITAS, the SF 1402 did not display the Warrant Level or Max Dollar Amount. If those elements were required to display, they needed to be included within the Limitations text. Additionally, there was no Agency logo/seal displayed on the SF 1402. System updated to display the Max Dollar Amount and allow AWM to configure Warrant Settings to Display Warrant Level, Display Agency Logo, and Allow Bureaus to Decide if Agency Logo is Displayed.
- User Impact: Agency Warrant Manager (AWM) must choose additional Warrant Settings to display the Warrant Level data element and/or the Agency’s logo on the SF 1402. If allowed by the Agency, Bureau Warrant Manager (BWM) may choose to remove the Agency’s logo from the SF 1402 for warrants issued to employees within their Bureau.

Release 14.5 December 7, 2016

*Course Catalog Redesign

- Previously in FAITAS, the Course Catalog presented course and class information by Teaching School Only. System updated to display all courses with current class offerings by a variety of alternative means such as but not limited to: Category, Location, delivery method, and start/end dates. System also updated to streamline training request process by generating a training request once the “Apply” button is selected.
- User Impact: Users now have the ability to search and register for classes in a more specific or broad manner, saving the students time and yielding more exacting results.

*Update FAC Certification Program Names

- Previously in FAITAS, some Federal Acquisition Certification (FAC) programs displayed with an acronym, others displayed the full name of the certification program, and others only display the program, without FAC identification. System updated to display acronyms within the system, and both full name and acronyms on Certification certificates. The Acronym will display on the CL Achievement Certificate.
- User Impact: Users will now see consistency throughout the system for all Federal Acquisition Certification programs.

*Update FAC P/PM Levels Naming Convention

- Previously in FAITAS, the Federal Acquisition Certification in Program and Project Management (FAC P/PM) list the certification levels as I, II, and III. Policy lists the levels as Entry, Mid, and Senior. System updated to reflect FAC P/PM levels as Entry, Mid, and Senior Level.
- User Impact: FAITAS users will now see their level on certificates and applications as Entry Level, Mid-Level, and Senior Level rather than I, II, or III.

* Add Remarks to Manually Entered Certifications

- Previously in FAITAS, Agency Certification Managers (ACMs) could manually add a certification for a user and attach supporting documentation; however, they were unable to leave remarks
regarding the entered certification record. System updated to require remarks for manually entered certification records.

- User Impact: ACMs are now required to include remarks when manually entering a new certification record.

* Manage CLPs: Update to CLP Management After Achievement Request Approval

- Previously in FAITAS, if a user maintained multiple certifications, a CLP request could be approved after one certification’s Achievement Request was approved. These approved points were unmanageable in other Certifications’ Achievement Requests. Business rules updated so CLP requests approved after an achievement request is approved will be manageable by the Bureau CL Manager (BCLM).
- User Impact: BCLMs can edit, disapprove, or return CL Point Requests within an Achievement Request if the request was approved after another certification’s AR approval. FAITAS users are less likely to have invalid or duplicate CLP requests associated erroneously with achievement requests, as they can now be managed as appropriate.

* Tier Bureau Certification Manager (BCM) User look up

- Previously in FAITAS, Tier level Bureau Certification Managers were unable to look up employees within their organization. System updated to allow for Bureau Certification Managers at the tier level the ability to look up their employees.
- User Impact: FAITAS Bureau Certification Managers will now be able to utilize the User Look up feature for employee which fall within their preview of the organizational structure.

**RELEASE 14.4 JULY 19, 2016**

+ My Training Graduation Report

- Previously, users were unable to generate a report listing their Training History from FAITAS and often requested “unofficial” transcripts from the FAI Help Desk. System updated to permit users to generate a PDF of their FAITAS Training Histories showing only graduations in the report.
- User Impact: FAITAS users can generate a PDF report of their graduation history from within My Training History. Users must have at least one graduation for records to display in the report.

* Manage Warrant View

- Previously, Agency Warrant Manager, Bureau Warrant Managers and Warrant Reviewers did not see a warrant’s Max Dollar Amount, Level, or Expiration Date on the Manage Warrant view requiring users to access individual warrants or generate a report to review this information. System updated to provide filterable columns which display a warrant’s Max Dollar Amount, Level, and Expiration Date if present.
- User Impact: AWM, BWM, and Warrant Reviewers may view and filter the Manage Warrant View based upon Max Dollar Amount, Level, and/or Expiration Date.
* BCM Access to Processed Fulfillment and Equivalency (F/E) Requests
  o Previously, BCMs were unable to access approved F/E requests within their queue’s Processed tab. System updated to return approved as well as disapproved requests.
  o User Impact: BCMs will be able to access approved as well as disapproved F/E requests as needed and filter the F/E Processed tab queue by status.

**RELEASE 14.3 APRIL 21, 2016**

* CL Impacts to Certification Date Change
  o Previously, when a Certification issue date was corrected, the corresponding CL Period did not update if there was CL History associated with the user’s account. System updated to permit changes to CL Period dates under certain situations. When a Certification date is corrected, the Agency Certification Manager (ACM) may update the dates of the user’s current CL Period to correspond with the corrected Certification Issue Date; however, if there is no approved Achievement Request with the previous CL Period, the ACM may choose to flow the date corrections to the previous as well as the current CL Period.
  o User Impact: ACMs will be required to supply remarks when action is taken on Certification and CL Period date corrections. Employees will see update to current CL Period dates which could impact the amount of approved CL Points associated with the period. Employees must submit an Achievement Request for the updated current CL Period to keep the certification(s) current. Previously approved Achievement Requests will not reflect the updated CL Period dates. Certification dates and CL Period dates will now match.

* Added Sub-Bureau Filter Functionality to Reports
  o Previously, reports could only be refined to the Bureau level, and Sub-Bureau Tier 1, Tier 2, and Tier 3 information for users was not visible in reports. System updated to include sub-bureau filters for the User Detail, Bureau Departure/Arrival Detail, Registration, Fulfillment/Equivalency, Agency Role, Supervisor, Certifications Issued by Certification Type, Certifications Issued Detail by Certification Type, Certifications Issued by FY Summary, CL Status – Current vs Expired – Detail, and CL Status – Current vs Expired – Summary Reports.
  o User Impact: Users with access to reports can now filter on Tier 1, Tier 2, and Tier 3 sub-bureaus where applicable. Additionally, the specific sub-bureau information displays on the report when the “Display Sub Bureau” box is checked.

* Add Remarks to Manually Entered Certifications
  o Previously in FAITAS, Agency Certification Managers (ACMs) could manually add a certification for a user and attach supporting documentation; however, they were unable to leave remarks regarding the entered certification record. System updated to require remarks for manually entered certification records.
  o User Impact: ACMs are now required to include remarks when manually entering a new certification record.
**RELEASE 14.2.1 FEBRUARY 9, 2016**

+ Added Filter Functionality for Fulfillment & Equivalency Pending and Previous Request Queues
  o Previously, pending and previous request queues displayed without any filters; however, the number of requests determined the length of time the queue took to load. ACMs with a greater number of requests to view may have experienced time-out issues. System updated to include filtering functionality so ACMs can have greater control over their queues. The default is set to display ten (10) requests; however, this number can be expanded.
  o User Impact: ACMs can control how many Fulfillment and Equivalency requests display, which will mean less time to wait for the queues for those Agencies that have larger number of requests. Requests can be filtered on Last Name, First Name, Bureau, Course Number, Request Type, Status, and Submit Date for both Pending and Previous Request queues.

**RELEASE 14.2 JANUARY 16, 2016**

+ Expanded Certification Workflow
  o Previously, Certification requests in FAITAS typically had an approval workflow with one optional Bureau reviewer and the final approval authority at the Agency level. System updated to expand the workflow to optionally include additional Agency and Bureau review steps as well as Sub-Bureau tiers down to three levels with the addition of a maximum of two review steps at each sub-level. Workflows may now be created for specific certification programs as well as customized for a Bureau.
  o User Impact: Agency Administrators create both the Agency and Bureau workflows, including the addition of Reviewers. Bureau Administrators, assigned by the Agency Administrator, can assign Reviewers. Assigned Reviewers have visibility at their organizational level and below.

* Registrar Access to Training, Certification, Warrant, and CL Histories
  o Previously, Registrars did not have access to Training, Certification, Warrant, and CL histories through the Manage User functionality. System updated to provide those with Registrar role access to Manage Workforce | Users functionality.
  o User Impact: Registrars will now be able to use the Manage Workforce | Users functionality screen to access user Training, Certification, Warrant, and CL histories.

* FAITAS LMS: Updated Instructor and Student Functionality
  o Previously, instructors were added individually to each FAITAS LMS course and the Detail tab did not provide search functionality for individual students within a class. System Updated to include the addition of an Instructor tab with Course, Class, and FY filters to better manage adding/deleting instructors as well as expanded search functionality in the student Course Detail tab to include First Name, Middle Name, and Last Name filters.
  o User Impact: FAITAS LMS managers will be able to search more quickly for individual students and add/delete instructors to courses.
**Release 14.1 January 8, 2016**

* AHCP Questionnaire Updates  
  - Last year’s AHCP Questionnaire was updated for FY15 reporting. Minor changes included adding information bullets, expanding character limitations, highlighting required columns, pre-populated last year’s response in Section I. Major changes included removing the email validation for final submission, ability to upload supporting documentation, and ability to print the Questionnaire in its entirety or by section into a Word document.  
  - User Impact: Agency AHCP Managers will now be able to confirm which Bureaus have successfully uploaded required documentation and print Questionnaires either as a resource or to be filled in by Bureau-level staff. Final approval will be streamlined with the elimination of the email validation requirements.

**Release 14 December 19, 2015**

* Profile and Supervisor Validation, Phase I  
  - Currently, profile data is self-declared, and a user selects his/her Supervisor from existing FAITAS accounts. System updated to require the profile be verified every 90 days and the Supervisor reselected. System updated to require new Supervisor designations be confirmed or denied by the selected Supervisor. System updated to allow user to send a system-generated email to manually entered email address inviting user to create a FAITAS account; feature intended use is for when a Supervisor does not yet have a FAITAS account.  
  - User Impact: Users will update profile data, specifically, Supervisor selection, every 90 days. Employees may choose a new Supervisor, but their Profiles will not update to the new Supervisor until their requests are confirmed by the new Supervisor. Supervisors will be notified of Supervisor Selections pending their confirmation/deny action within the system. Supervisors must either certify and confirm the Supervisor designation or deny the request.

**System-Generated Email Notifies Employee of Changed Supervisor Status**  
  - Previously, Employees may not have been aware when their approved Supervisor changed Agencies. System changed to provide email notification to Employees whose Supervisor changes Agencies.  
  - User Impact: Employees will now be notified when their current, approved Supervisor changes Agencies. Instructions on updating their Supervisor is provided in Employee: Other Tasks QSG & FAITAS FAQs.

* Reset Password: Update Security Questions  
  - Previously, FAITAS allowed a user to reset his/her password through a link in a system-generated email sent to the user’s email address tied to the FAITAS account. System updated to require user to correctly answer security question tied to the FAITAS account prior to having the ability to reset his/her password.
User Impact: Users requesting a password reset will be presented with their security questions and will need to correctly enter their responses; users will have three chances to answer all questions correctly. Once questions are answered correctly, the system-generated password reset email will be mailed to the email address tied to the user’s FAITAS account. If the questions are not answered correctly, after three failed attempts, the password reset function will be locked and the user must contact the FAI Help Desk to verify account ownership and have the password reset function unlocked.

* Dashboard Updates
  
o  Previously, the FAITAS Dashboard did not provide links to pending survey completion requests or completion certificates. System updated to add new Dashboard buttons: My Pending Surveys and My Completion Certificates to the My Current Training widget and to add Pending Survey Completion notifications to the My Notifications widget.
  
o  User Impact: Users will now be able to easily access pending surveys and Course Completion Certificates directly from the Dashboard.

+ New BCLM System-Generated Notification
  
o  Previously, Bureau CL Managers (BCLMs) were not notified when a CL Point Request was returned by the Employee. System updated so the BCLM will receive a system-generated email notification whenever an Employee returns a CL Point request.
  
o  User Impact: BCLMs will now receive email notification whenever an Employee returns a CL Point Request.

+ New Employee System-Generated Notification
  
o  Previously, a Bureau CL Manager (BCLM) could reduce/increase the number of CL Points from within a CL Achievement Request. However, the Employee was not notified when the CL Points were changed. System updated to notify the Employee when a BCLM reduces/increases the value of a previously approved CL Point Request.
  
o  User Impact: Employees will now know when a BCLM has changed the value of a previously approved CL Point Request. This will allow the Employee to know whether the changed CL Point value affects the availability of an Achievement Request if the total number of CL Points has been reduced below the required amount.

**Release 12.1 October 19, 2015**

+ Split CLPs between CL Periods
  
o  Previously, FAITAS allows an expired certification to be brought current by assigning a CL event and all associated CLPs to the previous lapsed CL Period. System updated to allow only the exact number of CL Points required to bring a lapsed period current to be assigned. CLPs associated with an approved CL Achievement Request may not be reassigned to a previous period and assigned CLPs no longer associated with the current CL Period, i.e., no double counting of points.
User Impact: Agency Certification Manager (ACM) may assign the exact number of CLPs required to bring a lapsed CL Period current as long as there are enough points in the user’s current period and the CLPs are not associated with an approved Achievement Request.

* Course Catalog: DAU Course Description
  - Previously, DAU course details and description information were not included in the FAITAS Course Catalog. System updated to populate DAU’s iCatalog course detail information directly into the FAITAS Course Catalog.
  - User Impact: Users can now access DAU course detail information in the FAITAS Course Catalog. DAU course information is displayed slightly differently in the FAITAS course catalog than the federally offered courses.

* Mass Email Preview - Update
  - Previously, mass email senders did not see the “This email is sent by [Agency name]” statement in the email preview sent to their registered FAITAS email address. System updated to include this feature in the email preview.
  - User Impact: Mass email creators will now see the statement, “This email is sent by [Agency name]” in the email preview.

* Mass Email: Opt Out and Privileged Sender
  - Previously, mass emails went to everyone included on the selected distribution list. The system was updated to allow a user to be added to an “opt-out” list. Individuals on the opt-out list will not receive future mass emails unless the mass email was sent by a “privileged sender”. Privileged senders’ emails bypass anyone on the opt-out list and send the mass email to all recipients.
  - User Impact: Agency and System Administrators may now add Employees to an Opt-out list. System Administrators may assign Privileged Sender status to a user’s account.

* FAITAS Profile - Update
  - Previously, Employees selected their Supervisors from the list of FAITAS account holders. There was no way to validate that the individual an Employee selected had the authority to act in a Supervisory capacity. Added an Employee Supervisor verification statement which must be checked if a Supervisor is selected. This is an initial step in a future system change requiring Supervisors to accept or deny the role of Supervisor for an Employee within the system.
  - User Impact: When updating or creating the FAITAS Profile, an Employee will need to verify that the selected Supervisor has the authority to act in a Supervisory manner by checking a box in the verification statement.

* Course Completion Certificate
  - Previously, short Course Titles did not center on the Course Completion Certificate. The system was changed so that all Course Titles are centered.
  - User Impact: None.
**RELEASE 12.05 SEPTEMBER 2015**

* Supervisory Report
  - Previously, Supervisors were unable to determine the FAITAS account status of Employees who listed them as their Supervisor. Added Status column to reflect Employees’ FAITAS account status of Active or Inactive.
  - User Impact: Supervisors will now know the FAITAS account status of their Employees when viewing the Supervisory Report.

* Display Courses by Teaching School Not Assigned to a Survey
  - Previously, survey managers and Registrars were unable to determine which courses offered by their Teaching School did not have assigned surveys. Updated system to allow survey managers and Registrars to view courses, within their Teaching Schools, that are not assigned to a survey. Updated system to allow selecting a course and then following the standard procedure to assign a survey.
  - User Impact: Teaching Schools will be able to more effectively manage the assignment of surveys to courses.

* Registrars Assign End-of-Course Surveys
  - Previously, only survey managers assigned end-of-course surveys to courses. Added functionality for Registrars to assign surveys to courses offered by their Teaching Schools.
  - User Impact: Registrars will be able to manage assigning end-of-course surveys for their Teaching Schools.

**RELEASE 12 31 AUGUST 2015**

+ CL Status Detail Report
  - Previously, Agency CL and Bureau CL Managers would generate the CL Status Report and then drill down to the user detail information; if the report deferred, then the user detail information was not exportable. Added the user detail information as a standalone report, which, if generated in Excel, is exportable if the report defers.
  - User Impact: Agency CL and Bureau CL Managers now able to access and generate the CL Status Detail Report that returns user level data.

+ Organizational Hierarchy Updated to Include Sub-Bureaus and Management
  - Previously, organizational hierarchy in the system was the parent Agency with child Bureau(s), with an Agency Administrator role capable of assigning other Agency- and Bureau-level roles. System added ability for Bureaus to have up to three child levels (Tiers) and added a new role, Bureau Administrator, to manage a Bureau’s organizational structure and role assignments.
- **User Impact**: Agency and/or Bureaus will be able to create/manage their Sub-Bureau organizational structure. Users are able to update their system Profile to reflect the lowest level Sub-Bureau to which they belong as set-up in the system.

* Mass Email Updates
- Previously, users of the mass email functionality did not have access to Warrant and Sub-Bureau filters for distribution list creation. Users were also unable to preview the email. System added two new mass email filter tabs: Sub-Bureau and Warrant and added a Preview function for mass email communiques. Additionally, system increased character count to 10,000 for the body section of the email.
- **User Impact**: Agency Admins and Registrars can now target mass email communications to active warrant holders and/or to the Sub-Bureau level. Agency Admins and Registrars can now also preview a copy of a mass email prior to submitting it for distribution.

* Online Class Location URL Highlighted
- Previously, FAITAS training requests and the My Training Requests pages displayed the dau.learn.mil address for accessing DAU-hosted online courses; however, users regularly contacted the FAI Help Desk inquiring where to access an online course. System now highlights the DAU-hosted location URL on Training Requests and the My Training Request pages.
- **User Impact**: Users with DAU-hosted CL training will notice the Class Location URL is now highlighted in yellow on the Training Request and My Training Requests pages.

* SF 1402 Limitations Text
- Previously, limitations text was left-justified on the SF 1402. Agencies requested the limitations text be centered. Limitations text is now center-justified.
- **User Impact**: None.

* Account Additional Information Update
- Previously, in the “The following users have selected EmployeeName as their supervisor” field in the Additional Information section of the Account page, a Supervisor would see all users who had selected him/her as their supervisor regardless of a user’s account status. System changed to only display users with active accounts in this section.
- **User Impact**: Supervisors will only see Employees with active accounts who have selected him/her as their Supervisor in “The following users have selected EmployeeName as their supervisor” field in the Additional Information section of the Account page.

* Equivalency Update
- Previously, an equivalency could not be submitted for training which was one day in duration. System updated to allow equivalency requests to be processed for training with the same start and end date and removed DAU CL courses from the course list.
o User Impact: Employees may now submit an Equivalency request for a course with the same start and end date. DAU CL courses are no longer available for Equivalency invitations or listed in the Course Selection of an Equivalency Request.

**RELEASE 11.6 21 JULY 2015**

+ Modify CL Points within an Achievement Request
  
o Previously, when BCLMs reviewed a CL Achievement Request (AR) and saw either duplicate point entries or did not agree with the number of CL Points (CLPs) awarded to an event, their only option was to disapprove the AR and have the CL point request final approval authority make the necessary modifications. System added ability for final approver to modify, including revoking, CL Points and to return an approved CL Point request to the Employee from within the Achievement Request process. CL Points cannot be modified for completed courses registered for through FAITAS or when the approved CL points are referenced in processed or pending Achievement Requests. In cases where the modified CL point value is below the approval threshold, system notification advises that the pending Achievement Request cannot be approved.
  
o User Impact: Users may experience modified, previously approved, CLPs. Final approvers will be able, in certain situations, to modify approved CL Point values.

* Help Widget
  
o Previously, FAITAS resources were accessible from the main navigation bar. System changed to rename existing Agency Resources widget to FAITAS Help Resources. Widget expanded to include links to User Guides & Presentations, Agency Resources Page, FAQs and Release Notes. Widget also includes links to general Agency-related information and, if available, the Agency's Acquisition Workforce (AWF) definition, as well as a link to the FAI Help Desk ticket system.
  
o User Impact: Within FAITAS, users are now able to access available FAITAS resources directly from the Dashboard.

**RELEASE 11.5 29 MAY 2015**

+ Teaching School Resources Page
  
o Previously, Registrars did not have a way to upload Teaching School resources. System added ability for Registrar to upload General Information, Registration Notes, Resource Files, and Resource Links.
  
o User Impact: Registrars now have ability to upload teaching school-specific resources. FAITAS users can view the Teaching Resources Page under the Help tab.

+ Acquisition Human Capital Plan (AHCP) Dashboards
  
o Previously, results of AHCP reporting were compiled manually. System added dashboards to facilitate year-over-year reporting on AHCP responses.
  
o User Impact: Users issued an Agency or FAI Data Analytics license now have access to AHCP data through various data analytics dashboards.
* Account Lockout
  o Previously, users were not locked out of their FAITAS account regardless how many attempted password tries were made. System changed to allow progressive timeouts to a maximum of 30 minutes on the 9\textsuperscript{th} incorrect attempt. The FAI Help Desk is \textit{not} able to unlock accounts.
    o 1\textsuperscript{st} attempt: 0 second lockout
    o 2\textsuperscript{nd} & 3\textsuperscript{rd} attempts: 5 seconds
    o 4\textsuperscript{th} & 5\textsuperscript{th} attempts: 10 seconds
    o 6\textsuperscript{th} attempt: 20 seconds
    o 7\textsuperscript{th} attempt: 30 seconds
    o 8\textsuperscript{th} attempt: 60 seconds
    o 9\textsuperscript{th} attempt: 30 minutes
  o User Impact: Users will notice system alert messages after each incorrect password try and will be locked out of their FAITAS account for the specified period of time. Users should use the Forgot your Password link to reset their password rather than risk account lockout.

* Password Length Increases
  o Previously, the minimum password length was 8 characters and the maximum length was 12 characters. The updated password rules are now: minimum 10 characters; maximum 16 characters. Passwords still must also contain at least one upper case letter, one number, and one symbol.
  o User Impact: Users will be prompted to follow the updated password requirements at their next password update. Currently, users change their password every 90 days.

* User Guide Page Update
  o Previously, user documentation, including user guides and presentations, were located in two different locations under the Help tab. All documentation has now been co-located on one page. HTML headers at the top of the page permit users to skip to the module of interest. Updated titles now provide clearer descriptions of the user documentation content. Adobe Reader and Flash messages have been updated. Select Help information is still available without logging into FAITAS.
  o User Impact: Within FAITAS, users will now be able to select documentation from one page rather than different locations.

* Course Catalog Visible Outside System
  o Previously, the Course Catalog was visible only once the user logged into the system. The completed course catalog is now available under its own tab, Course Catalog, outside the Login screen.
  o User Impact: Users will now be able to locate and review both online and resident courses without logging into FAITAS. To apply for training, users will still need to login.

* Supervisor Access to Processed Training Requests
Previously, Supervisors could not view processed training requests for their employees. System changed to permit supervisors to view all processed training requests, including both resident and auto-enrolled online requests.

User Impact: No impact to Employees. Supervisors will now be able to view processed training requests as they are able to do with Cert and CL requests.

* Warrant Update
o Previously, the Max Dollar amount setting was 2 billion dollars. Set the Max Dollar ceiling to $999,888,999,888 to accommodate warrants with high Max Dollar thresholds.

User Impact: Users with warrants with a Max Dollar amount over 2 billion dollars can now have their warrants managed within the system.

**RELEASE 11.1.2 10 MAR 2015**

* Warrant Update
o Previously, a warrant holder could add supporting documentation to his/her warrant if it was manually added or uploaded. System changed to allow warrant holder to view added supporting documentation, but not to upload supporting documentation to manually added or uploaded warrant(s).

User Impact: Warrant holders are unable to upload supporting documentation to manually added or uploaded warrants.

**RELEASE 11.1.1 19 FEB 2015**

+ Continuous Learning Update – Manage Lapsed CL Period
o Previously, the Agency Certification Manager (ACM) could not assist users whose previous CL Periods have enough CLPs for maintenance but lapsed due to not submitting a CL Achievement Request. Added the ability for ACM to approve a CL Achievement Request for lapsed CL Period in which enough CLPs were earned, but the CL Achievement Request was not submitted.

User Impact: User’s previously maintained but lapsed CL Period may now be brought into a Current state at the discretion of the ACM. ACM may now bring a lapsed CL Period into a Current status if enough CLPs were earned, but no CL Achievement Request was submitted.

* Course Completion Certificate Update
o Previously, the course title displayed with initial caps only which made abbreviations and acronyms display incorrectly. Updated the course title to now display in all capital letters.

User Impact: None.

* Fulfillment and Equivalency (F/E) Updates
o Previously the Bureau Certification Manager (BCM) and ACM could only sort the F/E request queue via column header. Search feature added to aid sorting and locating specific requests.
Previously, the F/E course pick list only displayed courses if there were scheduled classes in the current or next FY. Updated logic to include courses with a class offering within a three-year period: Current FY plus/minus one year.

Previously, an approved Equivalency which was completed in a user’s current CL Period would not populate the user’s CL History. Added the functionality to automatically populate a user’s CL History with an approved Equivalency if the equivalency was completed during the current CL Period.

User Impact: Users maintaining certifications through the continuous learning module will not need to submit a CL Point request for approved Equivalency requests which were completed during a current CL Period; equivalency event and CLPs will populate the user’s CL History. ACMs and BCMs may search for F/E requests in the queue and will have an expanded list of courses from which to choose on an F/E invitation.

**Reservation Email**

Previously, the system-generated email for a course Reservation or Wait did not include remarks added by the Registrar to the training request. The system-generated email will now display the last general remark added by the Registrar, such as travel and welcome information.

User Impact: Users shall see comments added by Registrar in the system-generated email once a Reservation or Wait is granted for a course.

**Warrant Holder Detail Report**

- Report updated to include the Warrant Number column.
- Report updated to indicate Max Dollar value of zero (0) for Unlimited Warrants.
- User Impact – None.

**Warrant Updates**

- Previously, supporting documentation could not be added to uploaded and manually added warrants. Added the ability for the Agency Warrant Manager (AWM), Bureau Warrant Manager (BWM), and the warrant holder to attach and view supporting documentation to uploaded and manually added warrants.
- Previously, Warrant Remarks were not being captured when an AWM/BWM made an edit to an uploaded or manually entered warrant. Issue now resolved, and remarks are captured when the warrant is edited.
- Previously, the appointment date on an uploaded warrant was only editable by the person associated with the warrant at the time of the history upload. Added the ability for the AWM or BWM to update appointment date for manually entered/uploaded warrants.
- User Impact: AWMs, BWMs, and warrant holder have the ability to attach supporting documentation to uploaded and manually entered warrants. AWMs and BWMs also have the ability to update the appointment date and may now leave remarks when editing uploaded and manually entered warrants.
**RELEASE 11.1 27 JAN 2015**

* Weekly Low Fill Report
  - Report updated to include the following columns and calculations:
    - Go/No Go Date: Class Start date minus 10 days
    - Closeout date: Class End Date plus 14 days
    - Graduates: Output status of "G"
    - Graduation Rate: Total Number of Graduates over Total Number of Inputs
    - Attendees: Equates to the total students with an input of "I"
    - Fill Rate: Total Number of Inputs over Total Number of Class Seats
    - Attendee Rate: Total Number of Inputs over Total Number of Reservations
  - User Impact: Registrars no longer need to add these columns and calculations manually.

**RELEASE 11, 17/18 DEC 2014**

+ Acquisition Human Capital Plan (AHCP)
  - Previously, the annual process of completing the AHCP was done via word processing. The documents were then compiled to generate reporting information. Added an automated questionnaire that includes access to historical data and customizable workflows.
  - User Impact: An Agency is able to create a custom workflow for the Agency AHCP questionnaire collaboration and submission to OFPP. An Agency may solicit Bureau input through Bureau AHCP questionnaires which have their own Bureau workflow created by the Agency. Only users assigned as Reviewers to a workflow will have access to a questionnaire.

+ Certification Status View
  - Previously ACMs and BCMs could only see the status of a Certification Request once it was in their queue for action. Added a View Certification Request Status function to allow ACMs and BCMs to view the status of Certification and Specialization/Agency Requirements Requests anywhere in the workflow.
  - User Impact: ACMs and BCMs can now search for and view a Certification and Specialization/Agency Requirements Request’s status: Approved, Disapproved, Supervisor Pending, Returned by Supervisor, Bureau Certification Manager Pending, Returned by Bureau Certification Manager, Agency Certification Manager Pending, Returned by Agency Certification Manager, and Cancelled.

* Training Request Button Update
  - Previously, the button for training request said "Forward to FAI". Changed the button to read "Forward to Registrar".
  - User Impact: Users will now know that their training requests have been forwarded to the Registrar, thereby minimizing confusion caused by the previous "Forward to FAI" button text.
* Certification Certificate Update
  o Previously, the FAI Certification Certificate template included a date but in a non-standard format. Updated the date format to Full Month, Day, Year, for example, June 21, 2015.
  o User Impact: None

* Class Roster Report Update
  o Previously, the Class Roster report was being manually updated to include No Shows and Walk-in students. Updated to include No Show and Walk-in columns and shading, red for No Shows and green for Walk-in students.
  o User Impact: Registrars will no longer need to manually add these columns to the Class Roster Report.

* Prioritization of FAI Training Requests
  o Previously training requests for FAI defaulted to a Priority 2 because business rules governing priority were yet to be established. Business rules are now established, and training requests will automatically have their priority set when it reaches the FAI Registrar’s queue. Registrars still retain the ability to change a Priority manually prior to processing the Training Request. Once a Training Request is processed into a Reservation or a Wait, the priority setting cannot be changed.
  o User Impact: Employees registering for FAI classroom courses will have a priority assigned to the training request based off of set criteria concerning certifications and acquisition workforce membership. See Release 10.2 Waitlist Prioritization to review potential prioritization impact to users on a waitlist.

* CL Widget Update
  o Previously, some FAITAS users were confused by the status icons on the CL widget. Color coding (RAG) was added to progress indicators for clarity. An additional “Action Required: Achievement Ready for Submission” will display when a user has obtained enough CL Points to request currency.
  o User Impact: Users will now be able to clearly understand their CL status. Red, Amber, and Green colors will indicate the progress level towards 100% CL completion, and the CL Status will indicate if the underlying certification is in an Expired status.

**RELEASE 10.2, 19 NOV 2014**

* Waitlist Prioritization
  o Previously, waitlisted students for FAITAS class offerings would roll into open classroom seats in order by date/time stamp. Updated the waitlist to include prioritization assigned to the student at the time they were placed on the waitlist, 1-4. Now waitlisted students will roll into open classroom seats by Priority and order of the date/time stamp.
* User Impact: A higher priority waitlisted student will fill open seats before a lower level priority student even if the lower level priority student has been on the waitlist longer.

* Update to Mass Email Distribution

  o Previously, mass emails would include inactive accounts in the distribution list. Now distribution lists include only active accounts by default.
  o User Impact: Inactive account holders will not receive mass emails.

**RELEASE 10.1, 03 OCT 2014**

+ FAITAS LMS

  o Previously, employees would register for the following CL Modules in FAITAS and then log into DAU’s system to access the courseware: FAC 006, FAC 007, FAC 018, FAC 019, FAC 043, and FAC 047. Added an integrated Learning Management System (LMS) capability for online courseware which will allow students to access courseware directly within FAITAS.
  o User Impact: Employees will now register for FAC 006 (FED), FAC 007 (FED), FAC 018 (FED), FAC 019 (FED), FAC 043 (FED), FAC 047 (FED) in FAITAS and be able to launch the courseware directly from within FAITAS. Students will not receive emails from DAU for these courses; however, the course will be available to access in FAITAS as soon as registration is complete. Students will have access to their course completion certificates within FAITAS for these courses after completing the associated FAI survey. Students will be able to cancel a reservation for an LMS course as long as they have not started the course.

+ Course Catalog

  o Added a Course Catalog function accessible under the Manage Career | Training on the navigation bar. The Course Catalog lists, by teaching school, the offered courses, class schedule, course descriptions, CLP Values, prerequisites, and teaching school specific information.
  o User Impact: Employees may now review course information and class schedule before applying for a course. Employees may apply for a course directly from the Course Catalog page.

* Agency Resource Page Update

  o Previously, all added documents to an Agency Resource page were viewable to anyone from the FAITAS login page as well as all FAITAS users from within FAITAS. Added three types of document access that can be assigned to a document: Public, Logged in Users, Users within the Agency/Bureau. Also added a category column to uploaded documents.
  o User Impact: Agency Administrators may now restrict access to documents to those within their Agency, logged in FAITAS users, or the general Public. Agency Administrators may now also assign predefined categories to documents. Employees may no longer have access to all documents on an Agency’s Resource page.

* Warrant Workflow Update
Previously, the warrant workflow was limited to 8 review steps. Increased the potential number of review steps to an indefinite number.

User Impact: Agency Warrant Managers (AWM) may now create a workflow with an infinite number of review/approval steps.

**Manage Warrant View Update**

Previously, Agency and Bureau Warrant Managers (AWM/BWM) could only access all warrants through the Search Warrant feature. Added all Agency warrants to the AWM and all Bureau warrants to the BWM Manage Warrants’ Workforce Warrants table. Added a pagination setting to the Workforce Warrants table with a default setting to display 50 records. Table continues with the Column Header sort feature.

User Impact: AWMs and BWMs will have many more records in their Workforce Warrants table and will now be able to access their respective warrants either through the Manage Warrants view or through the Search Warrants feature. AWMs/BWMs may regulate the number of records in the table through the pagination setting and may sort through all records using the column headers.

**Release 10, 18 Sep 2014**

**Delete Certification Function**

Previously, the only way to correct a manually entered or uploaded certification record was for the Agency Certification Manager to revoke the certification. Added the ability for the Agency Certification Manager (ACM) to delete certification records that were manually added or part of the initial certification history upload. Also provided capability for ACM to reinstate a lower level certification to currency if a higher-level certification is deleted.

User Impact: ACM can delete manual/uploaded certification records. If the employee holds the certification at a lower level, a new CL Period displays on the Employee’s CL History and is based off of the original certification date of the reinstated certification. At the discretion of the ACM, the employee may/may not be notified of the certification record and/or CL Period change; however, the employee’s certification history will no longer display the deleted certification.

**Class Location Information**

Previously class location on training request emails was limited to city and state information. Class street address information is now available on select training request emails.

User Impact: Employees will now have the street address included on initial submission emails, as well as training request approval emails.

**FAC-C Certification Options**

Updated the Certification options to include Legacy and Refresh certification requirements.

User Impact: Employees may be presented with a choice of using Refresh or Legacy requirements when applying for a FAC-C certification. Certification requirement options displayed depend upon the date the certification is being requested and courses in the employee’s FAITAS Training History at the time of the request.
* My Training History Update  
  o Updated the Training History to include Class Number information.  
  o User Impact: None.

* My Portfolio Update  
  o Previously, the button that would submit documentation to be attached to a request displayed ‘Submit’. The button caused confusion as clicking the button only attached documentation and did not submit the request. Changed the ‘Submit’ button to display ‘Attach’.  
  o User Impact: None.

* My Training Widget  
  o Previously the My Training widget on the dashboard would only display the Search for Training button before an employee submitted any training requests. The button would then convert My Training Requests to allow an employee to review their requests. Both buttons are now always available.  
  o User Impact: Employees may enter the training search by either the Search for Training button on the My Training widget or through the navigation bar, Manage Career | Training | Search for Training.

* Manage Certifications Update  
  o Previously, the Agency column on the Manage Certifications view listed the agency which issued the certification. This caused confusion because certifications were listed that reflected other agencies than the host agency. Updated column header from ‘Agency’ to ‘Issuing Agency’.  
  o User Impact: None.

**Release 9.2, 16 Sep 2014**  
* Warrant Holder Detail Report Update  
  o Updated the report to provide email address and job series information.  
  o User Impact: Agency Warrant Managers will no longer need to correlate the User Detail Report and the Warrant Holder Detail Report.

**Release 9.1, 11 Sep 2014**  
+ Small Business Career Field  
  o Added Small Business as a Career Field option  
  o User Impact: Employees may now select Small Business as a Career Field on their Profile if they are a member of the Acquisition Workforce (AWF).

* Business Cost Estimating Career Field Update  
User Impact: Users who previously selected Business Cost Estimating as their Career Field on their Profile will now display Cost Estimating as their selected Career Field.

RELEASE 9, 22 JULY 2014

+ No Show and Cancellation Penalty feature
  o Added capability for Teaching Schools to setup and manage their own No Show and Cancellation penalty settings.
  o User Impact: Teaching Schools will need to configure the settings for their No Show and Cancellation Penalties to be in line with their policies. Employees will see the Teaching School’s No Show and/or Cancellation penalties when requesting training from their schools. Employees who have No Show(s) and/or Cancellation(s) in their training history may be prevented from applying for a course, or all courses, offered by a Teaching School for a set period of time.

* Login Page Update
  o Indicated that the email address and password fields are required, updated the color of the Login button, as well as updated the access error message.
  o User Impact: None; visual updates are to aid account holders in the login process.

* Training Advanced Search Update
  o Search results are now provided in a modal window versus scrolling in the Advanced Search section.
  o User Impact: Employees now have easier access to advanced search results.

* Updated Continuous Learning Achievement Requests
  o Added access to an Employee’s FAITAS Training History on the Achievement Request to aid in the review process.
  o User Impact: Supervisors and Bureau Continuous Learning Managers now have access to an Employee’s Training History directly from within the CL Achievement Request versus looking up the history outside of the review process.

- Removed Draft Certification Requests
  o A draft version of a Certification Request is no longer generated when an Employee initiates a Certification Request but does not submit it.
  o User Impact: Employees who do not submit a Certification Request that is initiated will no longer have a draft copy saved. However, all attached documentation will still be available within the My Portfolio feature for when the Employee is ready to submit a Certification Request.

RELEASE 8.3, 15 JULY 2014

* CL Status Report Updated
  o Added a CL Achievement Status column to the report.
User Impact: Bureau CL Managers and Agency CL Managers can now see the status of an employee’s CL Achievement request which is required to maintain a certification.

**RELEASE 8.2, 08 MAY 2014**

+ IT Specialization
  - Added the IT Specialization to support the updated FAC-P/PM policy.
  - User Impact: Employees who hold a current FAC-P/PM, Levels II or III, may apply for the IT Specialization. FAC-P/PM Bureau and Agency Certification Managers will receive and process IT Specialization Requests.

* FAC-P/PM Certification Requirements
  - Updated the certification Requirements for the FAC-P/PM to support current FAC-P/PM policy.
  - User Impact: None.

* Designate CLP Functionality
  - Previously Agency Certification Managers could designate CLPs from a current CL Period to a previous CL Period for a certification that was in a lapsed/expired status only for the first 30 days of the new CL Period. Agency Certification Managers may now utilize the functionality for 730 days into the new CL Period to support the updated FAC-P/PM policy.
  - User Impact: Agency Certification Managers now have an extend period of time to utilize the Designate CLP functionality. Use of the functionality is up to the Agency Certification Manager’s discretion.

**RELEASE 8.1, 04 MAR 2014**

+ Acquisition Program Assignment Reports
  - Added the ability to generate an overview as well as a detail report regarding an agency’s Acquisition Programs and personnel assignments.
  - User Impact: System Administrators, Agency Administrators, and Agency Report viewers may now generate reports on their Agency’s Acquisition Program Assignments.

+ End of Class Survey Reports
  - Previously generating a report with end of class survey results was completed in FAI Survey Center and available only to those with survey privileges. An aggregate overview report as well as a detail report displaying individual survey results is now available within the FAITAS reports module.
  - User Impact: Registrars, Agency Administrators, Agency Report Viewers, and System Administrators may now generate end of course survey reports directly within FAITAS’s reporting module.

* Updated Registration Report
o The Registration Report previously displayed Online classes by class start and end date which prohibited filtering results based on a time period smaller than the fiscal year. The report is updated to reflect online initiation and completion dates to facilitate reporting by date ranges.

o User Impact: none.

**RELEASE 8, 11 DEC 2013**

**Warrant Management Capability**

- Added the ability for Agencies to issue and manage warrants with customizable workflows and warrant requirements.

- User Impact: Agencies may invite users to request a warrant and process the request through the review and approval workflow. Agencies may change the status of a warrant from Active to Suspended or Terminated. Employees may request a warrant through invitation only and must meet the agency defined requirements for holding the warrant or have a waiver request accompany the warrant request.

**Course Fulfillment and Equivalency Capability**

- Provided the capability to allow employees to update their training histories through course equivalencies and fulfillments if implemented by their agency. Agencies may now allow their employees to request a course equivalency for training that was not registered for through FAITAS. Agencies may also allow their employees to request meeting the course objectives through on the job training and experience through a fulfillment request.

- User Impact: If implemented, employees may request courses be added to their FAITAS training history through a fulfillment or equivalency request. Approved requests will display on the employee’s training history and be validated against for training prerequisite(s), IDP progress, as well as certification and warrant requests.

**Bureau Change Notification Option**

- Bureaus may now elect to be notified when employees enter or leave their bureau.

- User Impact: No impact to the employee changing their bureau. However, bureaus that elect to be notified will have a queue to review the employee changes and indicate that the change was reviewed.

**Agency Role Report**

- Agencies can now run a report and list who is assigned to the various roles within FAITAS.

- User Impact: none.

**Supervisor Report**

- Agencies can now generate a report that lists all employees in their agency currently listed as a supervisor and which employees have selected them.

- User Impact: none.
+ CL Achievement Request Processing Metrics Report
  - Agencies and bureaus can now view CL Achievement Request completion data to include average response time in days by the Employee, Supervisor, and Bureau CL Manager.
  - User Impact: none.

+ Certification Disapproved and Returned Metrics Report
  - Agencies and bureaus can now view metrics on the number of Certification requests disapproved and returned during a time period.
  - User Impact: none.

+ User Detail Report Access
  - Bureau Certification and Continuous Learning Managers now have access to a redacted version of the User Detail Report. A bureau can only see information for their bureau and not across the agency.
  - User Impact: none.

+ Active Email Report
  - Through this report, FAI now has the ability to generate an active users' email list across all agencies.
  - User Impact: none.

* Changed Inactive Accounts
  - Previously, Acquisition Career Managers (ACMs), or their designees, could request an employee’s account be inactivated within FAITAS. The effected employee would not be able to access their account; however, system notifications were still generated, in particular for Continuous Learning. Account inactivation may still be done manually, however, now if an account is idle for over two years the account will automatically be inactivated and any pending requests will be cancelled. System notifications will cease for inactivated accounts and the final approver authority for warrants will be notified if a warrant is associated with an inactive account.
  - User Impact: Employees must log into FAITAS at least once every two years or their account will be inactivated. An employee will need to choose a new Supervisor if their Supervisor’s account is inactivated. Employees may request their account be reactivated through their ACM. Reactivated accounts will require Profile information to be updated.

* Updated User Registration Report
  - By Agency, the report now displays the aggregate number of users who self-declared they are a member of the acquisition workforce on their profile; added the ability to filter the report for Active and Inactive accounts.
  - User Impact: none.

* Updated the Certifications Issued Detail report
Detail report now includes a column depicting if the report was added manually, through a history upload, or through a certification request. Detail report now depicts the three profile AWF Acquisition Program selections of the employee.

User Impact: none.

* User Detail Report Update

The report no longer displays the self-declared user information for certification level achieved and required. The report now displays if the account is Active or Inactive and there is the ability to filter results on account status.

User Impact: none.

* Updated CL Achievement Certification

Added the following information to the CL Achievement Certificate:

- Awardee has until [Start Date of next CL Period] – [End Date of next CL Period] to complete continuous learning for the next two-year period.
- Certification valid through: [End Date of next CL Period].

User Impact: none.

* Updated Certification Request Queue for Reviewers and Approval Authorities

Added a Date Received column to the Certification Request queue so reviewers and approval authorities can see when a request entered their queue without opening the request.

User Impact: Supervisors, Bureau Certification Managers (BCMs), and Agency Certification Managers (ACMs) can now sort the Certification Request queue by Received Date.

RELEASE 7.1, 02 OCT 2013

* Added line to mass emails

- All mass emails generate from the Training@fai.gov address. Previously, it was not always clear which agency actually sent the email. Changed the mass email template to include the following at the top of generated emails, ***** This email is sent by [Agency Full Name] through FAITAS from an unmonitored account; please do not reply. *****

User Impact: none.

RELEASE 7, 20 SEP 2013

* Redesigned the Dashboard

- Dashboard now consolidates notifications and typically presents key information without scrolling.
- User Impact: Announcements now list just the headings and must be clicked to display the announcement.

* Changed the Achievement continuous learning point (CLP) values for certifications
Previously, achievement CLP values were a single setting per certification. Achievement values are now set at certification levels and are customizable by Agency.

User Impact: FAC-COR level I achievement requests will be available to submit upon award of 8 CLPs instead of 40 if user’s agency does not require a greater number of CLPs. Some employees will obtain the minimum standard of CLPs for certification maintenance and not be able to submit a CL Achievement Request as their agency’s CLP requirement is greater than FAI’s.

* Change Bureau “resets” certification and continuous learning (CL) requests in process
  - Previously when an employee changed bureaus on their profile, their in-progress certification and CL requests remained in the previous bureau’s approval workflow. Now when an employee changes their bureau on the Profile page, in progress certification and CL requests will terminate and the requests will be available to the employee to resubmit to the new bureau’s approval workflow.
  - User Impact: Employees will need to resubmit certification and CL requests that are in the approval process when they change their bureau designation on the Profile page.

* Changed Acquisition Program Assignments to allow multiple concurrent roles.
  - Previously an employee was only able to have one active role assignment per acquisition program. Now employees may hold multiple active roles on a program(s) and multiple employees may hold the same role on a program.
  - User Impact: Employees may now update their program assignments to reflect all roles held on programs. Agency Administrators may now assign multiple employees to the same role during the same timeframe and assign multiple active roles to an employee.

* Changed Document Upload Process – My Portfolio
  - Previously there was no documentation management capability within FAITAS and employees would need to upload the same document multiple times if attaching it to different requests (training, certification, continuous learning.) My Portfolio now enables employees to upload a document once to attach it to the current request and make it available to attach to subsequent requests. Also, through My Portfolio, is the ability to attach system generated Certification, CL, and Training certificates directly to requests.
  - User Impact: Employees may now attach previously uploaded and system generated certificates to requests.

+ Added breadcrumb navigation to Teaching School splash page
  - Breadcrumb navigation now available on teaching school splash page affording employee’s the opportunity to navigate back to the class selection page.
  - User Impact: Employees can now navigate backwards from Teaching School splash page to a previous point in the search for training process.

+ Added Help menu options
Added overview presentations on Certification and Continuous Learning topics as well as release notes.
User Impact: Employees can access presentations by navigating the menu options Help | User Guides | User Presentations and access the release notes at Help | User Guides | Release Notes.

- Removed link to dashboard on My Status menu tab
  
  My Status tab was the only menu tab that included a direct link to a location in FAITAS in addition to the child menu options. Removed the dashboard link to make the menu tabs uniform.
  User Impact: Users may now navigate to the Dashboard by one of three methods: through the menu option My Dashboard, clicking on the FAI logo, or by expanding the Name widget (top right-hand side of each page) and clicking on the house icon.

RELEASE 6, 05 JUNE 2013

+ Acquisition Workforce (AWF) Designations to Profile
  Acquisition workforce members now must select one or more AWF groups that best describes their acquisition work. Agencies who utilize the Acquisition Program Assignments determine which group(s) of AWF members may assign themselves to managed programs.
  User Impact: AWF members must now update their Profile page before they can choose acquisition program assignments.

+ Integrated Survey capability
  Added the ability for FAI and DHS to assign an end of course surveys to courses and designate if a course completion certificate’s availability is tied to completion of the survey.
  User Impact: Depending on FAI and DHS settings, Employees may now need to complete course completion surveys to obtain a course completion certificate. Employees may access their surveys by navigating to Manage Career | Survey | View My Surveys.

+ Certification Specializations/Additional Agency requirements
  Added the ability for agencies to require additional agency specific requirements for the base FAC certifications.
  Added ability for FAI and agencies to workflow specializations tied to certifications, e.g., IT Specialization for FAC-P/PM.
  User Impact: Employees may request specializations for additional agency specific requirements and/or specializations tied to certifications. BCMs and ACMs need to review and approve specialization requests.

+ AWF Program Assignment button on user lookup
  For roles with access to the user lookup function, added the ability to review the employee’s AWF program assignment history.
  User Impact: none.
+ Web based class popup tool tip and notice
  o Added a tool tip and popup notice alerting employees registering for online courses that there is a delay from registration in FAITAS to the course being available in DAU’s system and they should receive email notification from DAU regarding their course registration and how to access the course.
  o User Impact: none.

+ AWF Mass Email Filter
  o Added a filter to the mass email tool allowing users to filter distribution lists on AWF members.
  o User Impact: Mass email users may select to filter their distribution lists for All AWF member or Non-AWF members.

* Update message for My Acquisitions
  o Changed the message for no results on the My Acquisitions view to “There are currently no acquisition programs available to you. This may be due to the acquisition program support categories you selected under Acquisition Program Details in your profile, or because this Agency is not utilizing the Acquisition Program Assignments module at this time.”
  o User Impact: None.

+ Active/Inactive status column to Acquisition Program Role view
  o Added Status column to the Program Role view indicating Active/Inactive.
  o User Impact: Users cannot select inactive job titles and will receive a warning if you try to edit an assignment with an inactive job title.

+ Out-of-Date Browser message
  o Added a popup message if user’s browser is no longer supported by FAITAS.
  o User Impact: employee may receive the popup message with a link on how to upgrade their browser. Internet Explorer 7 is no longer supported within FAITAS.

+ “Returned to Bureau” status
  o Previously when a certification request was returned to the bureau for additional review/action the certification request would not display on an Employee’s My Certification Requests view. Added a status of “Returned to Bureau” to display on My Certifications Requests” view.
  o User Impact: None.

**RELEASE 5, 14 FEBRUARY 2013**

+ Program of Record functionality
  o Added functionality for Agencies to record and manage Acquisition Programs and Acquisition Program Roles.
- User Impact: Agency Administrators create and/or edit new Acquisition Programs and/or Program Roles as well as add and/or manage employee assignments.

+ Added Status column to My Certifications view.
  - Added Continuous Learning Status column to My Certifications view to enable users to see CL Period status of Certification(s).
  - User Impact: None.

+ Added Agency Resources Page
  - Provided capability for agencies to post agency specific information, links, and documents and make it available to all FAITAS users.
  - User Impact: Agency Admins may now setup and maintain an Agency's Resources page. If a Resources page is enabled, Employees may access it through Help | Agency Resources.

* Changed Certification and CL reports results
  - Removed results for accounts with the Employee role removed from Certification and CL reports.
  - User Impact: None.

+ Confirmation message for Certification and CL Request approval/disapproval actions.
  - Previously to disapprover a certification or CL request a reviewer clicked the Approve or Disapprove button. Now, a reviewer must click a confirmation message in addition to the Approve or Disapprove button for action to be taken on the request.

User Impact: Reviewers with disapprove capability in a certification and/or CL workflow must now confirm their approval
Agency Administrator | Role Assignment & Workflow Configuration | Quick Start Guide

The Federal Acquisition Institute Training Application System (FAITAS) is the avenue for all federal civilian agency Employees to electronically manage their career development.

In this Quick-Start guide, you will find information about the Agency Administrator role to assign roles in FAITAS and configure Certification Workflows. For more information, to provide feedback, or to submit a ticket, visit the FAI Help Desk online at http://www.fai.gov/help-desk, or use the Contact Us option in the FAITAS Help menu.

## Roles

### Add or Delete Agency or Bureau Roles

Agency Administrators can set up FAITAS roles for their Agency. The example below explains the steps to add an Agency Warrant Manager. Repeat the steps to add/delete users to other roles (e.g., Agency Report Viewer, Training Manager, Bureau Administrator, etc.).

**NOTE:** Sub-Bureau Bureau Certification Managers cannot be assigned via this Navigation. See the **SUB-BUREAU CERTIFICATION MANAGERS: ASSIGN CERTIFICATION APPROVAL MANAGERS** section of this guide.

1. Navigate to Manage System | People | Agency from the top navigation bar.
2. In the Manage Agency screen, select your Agency if it has not already been selected.
3. In the Manage Agency Role field, select Agency Warrant Manager from the drop-down list.
4. Click the Manage Role for Agency button.
5. Click the Select User button. Enter all or part of a First Name, Last Name, Email, or SSN in the Search Users modal window. Click the Search button. From the displayed Search Results table, click the Select button next to the user to be selected.
6. Click the Make User a ‘Agency Warrant Manager’ for this Agency button. A green confirmation message displays at the top of the window.
7. To delete an Agency Warrant Manager, click his/her name in the Current Agency Warrant Managers box and then click the Remove Selected Agency Warrant Manager for this Agency button. A green confirmation message displays at the top of the window.

### Assign Bureau Administrator

If an Agency decides to allow Bureaus to manage their own roles and reviewers, the Agency Administrator can assign the Bureau Administrator role.

1. Navigate to Manage System | People | Agency.
2. If not already indicated in Agency field, select an Agency from the drop-down list.
3. From the Manage Agency Role drop-down list, select Bureau Administrator.

4. Click the Manage Role for Agency button.

5. Click the Select User button. Enter all or part of a First Name, Last Name, Email, or SSN in the Search Users modal window. Click the Search button. From the displayed Search Results table, click the Select button next to the user to be selected.

8. From the updated Search Results table, click the Select button next to the user to be added.

9. Click the Make User a ‘Bureau Administrator’ for all Bureaus in Agency button. Verification text confirms the user was added as Bureau Administrator.

**MANAGE BUREAU ARRIVALS/DEPARTURES ROLES**

When enabled, BCMs are notified when Employees change their Profiles to either indicate an arrival into or departure from the BCM’s Bureau. Agency Administrators can enable/disable this functionality.

1. Navigate to Manage System | People | Bureau.

2. The Manage Bureau screen displays.

3. Depending on your FAITAS role, you may be able to select an Agency and/or Bureau from the appropriate drop-down lists.

4. Click the Search button. The Manage Bureau screen updates with the selected information.

5. In the Bureau section, check/uncheck the Manage Bureau Arrivals/Departures checkbox.

6. Click the Update button.

**ASSIGN CERTIFICATION APPROVAL REVIEWERS**

Agency Administrators can assign reviewers. Access to this functionality can be found from within the workflow or from the navigation bar. Follow these instruction to assign reviewers from within the workflow.

1. Navigate to Manage System | Configuration | Manage Certification Approval Workflow.

2. If not already indicated in Agency field, select an Agency from the drop-down list.

3. With the appropriate workflow selected on the left side, the details display on the right side.

4. Within the Approval Steps section, a white exclamation mark within a red circle icon indicates no active reviewers have been added to the workflow step.

5. To update individual reviewers, click the Reviewers link.

6. Enter all or part of the Reviewer’s First Name, Last Name, and/or Email in the appropriate fields.

7. Click the Search button.
8. From the updated Search Results table, click the Select button next to the user to be added. The user displays in the Selected Reviewers panel at the top of the Select Reviewers modal window. Close the modal window.

9. Once the reviewers are added, note that the exclamation mark icon disappears from the Approval Steps section. Click the Submit button to save your changes.

**ASSIGN SUB-BUREAU CERTIFICATION MANAGERS**

Agency Administrators can assign sub-bureau certification managers. Access to this functionality can be found from within the workflow management screen. Follow these instruction to assign Sub-Bureau & Bureau Certification Managers from within the workflow.

1. Navigate to Manage System | Configuration | Manage Certification Approval Workflow.
2. If not already indicated in Agency field, select an Agency from the drop-down list.
3. With the appropriate workflow selected within left panel, the details display on the right panel.
4. Within the Approval Steps section, a white exclamation mark within a red circle icon indicates no active certification managers have been added to the workflow step.
5. Click the [Bureau] Certification Managers link which you wish to manage.
6. Select the Select User button
7. Enter all or part of the Reviewer’s First Name, Last Name, and/or Email in the appropriate fields. A recommended best practice is to either filter by name or email, but not both.
8. Click the Search button.
9. From the updated Search Results table, click the Select button next to the user to be added. The user displays in the Add/Remove Agency/Bureau Certification Managers panel of the Add/Remove Managers modal window. Select the Add user as Bureau Certification Manager button.

**NOTE:** Select the Manage Access by Certification button to manage the certification program access of all certification managers assigned to the indicated bureau/sub bureau.

10. Close the modal window.
11. Select the Submit button to save your changes.

**ADD AGENCY AHCP MANAGER**

Agency Administrators can assign Agency and Bureau AHCP Manager. Agency AHCP Managers manage the Agency/Bureau workflow.

1. Navigate to Manage System | People | Agency.
2. Select an Agency from drop-down list.
3. Select Agency AHCP Manager from Manage Agency Role drop-down list.
4. Click **Manage Role for Agency** button.

5. Click the **Select User** button. Enter all or part of a **First Name, Last Name, Email, or SSN** in the **Search Users** modal window. Click the **Search** button. From the displayed **Search Results** table, click the **Select** button next to the user to be selected.

6. Click **Select** next to the name of the user to be added.

7. Click **Make User a ‘Agency AHCP Manager’ for this Agency** button. A green confirmation message displays at the top of the window.

**ADD BUREAU AHCP MANAGER**

Agency Administrators can assign Agency and Bureau AHCP Manager. Bureau AHCP Managers can edit the Bureau workflow.

1. Navigate to **Manage System | People | Agency**.

2. Select an **Agency** from drop-down list.

3. Select **Bureau AHCP Manager** role from **Manage Agency Role** drop-down list.

4. Click **Manage Role for Agency** button.

5. Click the **Select User** button. Enter all or part of a **First Name, Last Name, Email, or SSN** in the **Search Users** modal window. Click the **Search** button. From the displayed **Search Results** table, click the **Select** button next to the user to be selected.

6. Click **Select** next to the name of the user to be added.

7. Click **Make User a ‘Bureau AHCP Manager’ for this Agency** button. A green confirmation message displays at the top of the window.

**CERTIFICATION/SPECIALIZATION WORKFLOWS**

**UPDATE AGENCY WORKFLOWS**

Agency Administrators can update Agency workflows, including the Agency-default, FAC-C, FAC-COR, FAC-P/PM, Additional Agency Requirements, or Specialization workflows.

**NOTE:** For steps to create a workflow, review the **Create Agency Workflow** task in this guide.

1. Navigate to **Manage System | Configuration | Manage Certification Approval Workflow**.

2. If not already indicated in **Agency** field, select an **Agency** from the drop-down list.

3. Ensure the **Active Workflows** radio button is selected

4. From the left panel of the **Manage Certification Approval Workflow** screen, click the name of the workflow to display the steps within the right panel.

5. To add basic workflow steps, click the checkbox in front of the appropriate step; to remove a step from the workflow, uncheck the checkbox
6. To add additional steps within each basic workflow step, ensure the basic workflow step is checked and click the “+” icon at the end of that line to display a new sub-bureau step.

**NOTE:** There can be up to three (3) total steps (inclusive of the basic workflow step) set up within each basic workflow step.

7. If you have assigned a Reviewer queue, click the **Reviewers** link.
8. Enter all or part of the Reviewer’s **First Name**, **Last Name**, and/or **Email** in the appropriate fields.
9. Click the **Search** button.
10. From the updated **Search Results** table, click the **Select** button next to the user to be added. The user displays in the **Selected Reviewers** panel at the top of the **Select Reviewers** modal window. Close the modal window.

11. Once the reviewers are added, note that the exclamation mark icon disappears from the **Approval Steps** section.

12. If you have assigned a Certification Manager step, click the [Agency/Bureau/Sub Bureau Tier] Certification Manager link next to the step you wish to manage.
13. Click the **Certification Manager** link within the modal window.
14. Select the **Select User** button.
15. Enter all or part of the Reviewer’s **First Name**, **Last Name**, and/or **Email** in the appropriate fields. A recommended best practice is to either filter by name or email, but not both.
16. Click the **Search** button.
17. From the updated **Search Results** table, click the **Select** button next to the user to be added. The user displays in the **Add/Remove Agency/Bureau Certification Managers** panel of the **Add/Remove Managers** modal window. Select the **Add user as Bureau Certification Manager** button.

**NOTE:** Select the **Manage Access by Certification** button to manage the certification program access of all certification managers assigned to the indicated bureau/sub bureau.

18. Close the modal window.
19. Click the **Submit** button to save your changes.

**CREATE AGENCY CERTIFICATION WORKFLOW**

Agency Administrators can create Agency workflows, including the Agency-default, FAC-C-, FAC-COR, FAC-P/PM, Additional Agency Requirements, or Specialization workflows. Workflows can be set up to end at the Agency- or Bureau-level.

**NOTE:** For steps to update a workflow, review the **Update Agency Workflow** task in this guide.

1. Navigate to **Manage System | Configuration | Manage Certification Approval Workflow**.
2. Ensure the **Active Workflows** radio button is selected.
3. If not already indicated in Agency field, select an Agency from the drop-down list.

4. From the left side of the Manage Certification Approval Workflow screen, click the “+ Add Agency Workflow” icon located above the horizontal line.

5. In the FAITAS New Agency Approval Workflow modal window, click the Certification radio button.

6. From the Select Certification field, select the appropriate certification from the drop-down list.

7. Click the Submit button.

8. To add basic workflow steps, click the checkbox in front of the appropriate step; to delete a step from the workflow, uncheck the checkbox.

9. To add additional steps within each basic workflow, ensure the basic workflow step is checked and click the “+” icon at the end of that line to display a new step.

10. Repeats steps 7-8 until all steps have been added.

   NOTE: There can be up to three (3) total workflow steps, inclusive of the basic workflow step, set up within each basic workflow step.

11. If you have added reviewer steps, you will need to add reviewers to the new steps. Once the steps are selected, click the Reviewers link to manage each.

12. Enter First Name, Last Name, or Email in the appropriate fields.

13. Click the Search button.

14. Enter all or part of the Reviewer’s First Name, Last Name, and/or Email in the appropriate fields.

15. The user displays in the Selected Reviewers panel at the top of the Select Reviewers modal window. Close the modal window.

16. Once the reviewers are added, note that the exclamation mark icon disappears from the Approval Steps section.

17. If you have assigned a Certification Manager step, click the [Agency/Bureau/Sub Bureau Tier] Certification Manager link next to the step you wish to manage.

18. Click the Certification Manager link within the modal window.

19. Select the Select User button.

20. Enter all or part of the Reviewer’s First Name, Last Name, and/or Email in the appropriate fields. A recommended best practice is to either filter by name or email, but not both.

21. Click the Search button.

22. From the updated Search Results table, click the Select button next to the user to be added. The user displays in the Add/Remove Agency/Bureau Certification Managers panel of the Add/Remove Managers modal window. Select the Add user as Bureau Certification Manager button.
NOTE: Select the Manage Access by Certification button to manage the certification program access of all certification managers assigned to the indicated bureau/sub bureau.

23. Close the modal window.

24. Click the Submit button to save your changes.

CREATE AGENCY SPECIALIZATION WORKFLOW

Agency Administrators can create Agency workflows, including the Agency-default, FAC-C-, FAC-COR, FAC-P/PM, Additional Agency Requirements, or Specialization workflows. Workflows can be set up to end at the Agency- or Bureau-level.

NOTE: For steps to update a workflow, review the Update Agency Workflow task in this guide.

1. Navigate to Manage System | Configuration | Manage Certification Approval Workflow.

2. If not already indicated in Agency field, select an Agency from the drop-down list.

3. Ensure the Active Workflows radio button is selected

4. From the left side of the Manage Certification Approval Workflow screen, click the “+ Add Agency Workflow” icon located above the horizontal line.

5. In the FAITAS New Agency Approval Workflow modal window, click the Specialization radio button.

6. From the Select Specialization field, select the appropriate specialization from the drop-down list.

7. Click the Submit button.

8. To add basic workflow steps, click the checkbox in front of the appropriate step; to delete a step from the workflow, uncheck the checkbox

9. To add additional steps within each basic workflow, ensure the basic workflow step is checked and click the “+” icon at the end of that line to display a new step.

10. Repeats steps 7-8 until all steps have been added.

NOTE: There can be up to three (3) total workflow steps, inclusive of the basic workflow step, set up within each basic workflow step.

11. If you have added reviewer steps to the workflow, , click the Reviewers link next to the step you wish to assign reviewers.

12. Enter all or part of the Reviewer’s First Name, Last Name, and/or Email in the appropriate fields.

13. The user displays in the Selected Reviewers panel at the top of the Select Reviewers modal window. Close the modal window.

14. Once the reviewers are added, note that the exclamation mark icon disappears from the Approval Steps section.
15. If you have assigned a Certification Manager step, click the [Agency/Bureau/Sub Bureau Tier] Certification Manager link next to the step you wish to manage.

16. Click the **Certification Manager** link within the modal window.

17. Select the **Select User** button.

18. Enter all or part of the Reviewer’s **First Name, Last Name**, and/or **Email** in the appropriate fields. A recommended best practice is to either filter by name or email, but not both.

19. Click the **Search** button.

20. From the updated **Search Results** table, click the **Select** button next to the user to be added. The user displays in the **Add/Remove Agency/Bureau Certification Managers** panel of the **Add/Remove Managers** modal window. Select the **Add user as Bureau Certification Manager** button.

   **NOTE**: Select the Manage Access by Certification button to manage the certification program access of all certification managers assigned to the indicated bureau/sub bureau.

21. Close the modal window.

22. Click the **Submit** button to save your changes.

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**CREATE BUREAU CERTIFICATION WORKFLOW**

Agency Administrators can create Bureau workflows, including the Bureau-default, FAC-C-, FAC-COR, FAC-P/PM, or Specialization workflows. Workflows can be set up to end at the Agency- or Bureau-level.

**NOTE**: For steps to update a workflow, review the **Update Agency Workflow** task in this guide.

1. Navigate to **Manage System | Configuration | Manage Certification Approval Workflow**.

2. If not already indicated in **Agency** field, select an **Agency** from the drop-down list.

3. Ensure the **Active Workflows** radio button is selected.

4. From the left side of the **Manage Certification Approval Workflow** screen, click the “+ Add Bureau Workflow” icon located below the horizontal line.

5. In the **FAITAS New Bureau Approval Workflow** modal window, click the **Certification** radio button.

6. From the **Select Certification** field, select the appropriate specialization from the drop-down list.

7. Click the **Submit** button.

8. To add basic workflow steps, click the checkbox in front of the appropriate step; to delete a step from the workflow, uncheck the checkbox.

9. To add additional steps within each basic workflow step, ensure the basic workflow step is checked and click the “+” icon at the end of that line to display a new step.

10. Repeats steps 7-8 until all steps have been added.
NOTE: There can be up to three (3) total workflow steps, inclusive of the basic workflow step, set up within each basic workflow step.

11. If you have added reviewer steps to the workflow, click the Reviewers link next to the step you wish to assign reviewers.

12. Enter all or part of the Reviewer's First Name, Last Name, and/or Email in the appropriate fields.

13. The user displays in the Selected Reviewers panel at the top of the Select Reviewers modal window. Close the modal window.

14. Once the reviewers are added, note that the exclamation mark icon disappears from the Approval Steps section.

15. If you have assigned a Certification Manager step, click the [Agency/Bureau/Sub Bureau Tier] Certification Manager link next to the step you wish to manage.

16. Click the Certification Manager link within the modal window.

17. Select the Select User button.

18. Enter all or part of the Reviewer's First Name, Last Name, and/or Email in the appropriate fields. A recommended best practice is to either filter by name or email, but not both.

19. Click the Search button.

20. From the updated Search Results table, click the Select button next to the user to be added. The user displays in the Add/Remove Agency/Bureau Certification Managers panel of the Add/Remove Managers modal window. Select the Add user as Bureau Certification Manager button.

   NOTE: Select the Manage Access by Certification button to manage the certification program access of all certification managers assigned to the indicated bureau/sub bureau.

21. Close the modal window.

22. Click the Submit button to save your changes.

CREATE BUREAU SPECIALIZATION WORKFLOW
Agency Administrators can create Bureau workflows, including the Bureau-default, FAC-C-, FAC-COR, FAC-P/PM, or Specialization workflows. Workflows can be set up to end at the Agency- or Bureau-level.

NOTE: For steps to update a workflow, review the Update Agency Workflow task in this guide.

1. Navigate to Manage System | Configuration | Manage Certification Approval Workflow.

2. If not already indicated in Agency field, select an Agency from the drop-down list.

3. Ensure the Active Workflows radio button is selected.
4. From the left side of the **Manage Certification Approval Workflow** screen, click the “+ Add Bureau Workflow” icon located below the horizontal line.

5. In the **FAITAS New Bureau Approval Workflow** modal window, click the **Specialization** radio button.

6. From the **Select Specialization** field, select the appropriate specialization from the drop-down list.

7. Click the **Submit** button.

8. To add basic workflow steps, click the checkbox in front of the appropriate step; to delete a step from the workflow, uncheck the checkbox.

9. To add additional steps within each basic workflow, ensure the basic workflow step is checked and click the “+” icon at the end of that line to display a new sub-bureau step.

10. Repeats steps 7-8 until all steps have been added.

   **NOTE**: There can be up to three (3) total workflow steps, inclusive of the basic workflow step, set up within each basic workflow step.

11. If you have assigned reviewer workflow steps, click the **Reviewers** link next to the step you wish to assign reviewers

12. Enter all or part of the Reviewer’s **First Name**, **Last Name**, and/or **Email** in the appropriate fields.

13. Click the **Search** button.

14. From the updated **Search Results** table, click the **Select** button next to the user to be added. The user displays in the **Selected Reviewers** panel at the top of the **Select Reviewers** modal window. Close the modal window.

15. Once the reviewers are added, note that the exclamation mark icon disappears from the **Approval Steps** section.

16. If you have assigned a Certification Manager step, click the [Agency/Bureau/Sub Bureau Tier] Certification Manager link next to the step you wish to manage.

17. Click the **Certification Manager** link within the modal window.

18. Select the **Select User** button.

19. Enter all or part of the Reviewer’s **First Name**, **Last Name**, and/or **Email** in the appropriate fields. A recommended best practice is to either filter by name or email, but not both.

20. Click the **Search** button.
21. From the updated Search Results table, click the Select button next to the user to be added. The user displays in the Add/Remove Agency/Bureau Certification Managers panel of the Add/Remove Managers modal window. Select the Add user as Bureau Certification Manager button.

**NOTE:** Select the Manage Access by Certification button to manage the certification program access of all certification managers assigned to the indicated bureau/sub bureau.

22. Close the modal window

23. Click the Submit button to save your changes.

**UPDATE BUREAU WORKFLOWS**

Agency Administrators can update Bureau workflows, including the Bureau-default, FAC-C-, FAC-COR, FAC-P/PM, or Specialization workflows.

**NOTE:** For steps to create a workflow, review the Create Agency Workflow task in this guide.

1. Navigate to Manage System | Configuration | Manage Certification Approval Workflow.

2. If not already indicated in Agency field, select an Agency from the drop-down list.

3. Ensure the Active Workflows radio button is selected

4. From the left side of the Manage Certification Approval Workflow screen, click the name of the workflow to display the steps on the right side.
   - If editing a workflow for the entire Bureau, Select the Bureau which you wish to edit the workflow for
   - If editing a workflow for a certification or specialization program request process, select the program which you wish to manage

5. To add basic workflow steps, click the checkbox in front of the appropriate step; to delete a step from the workflow, uncheck the checkbox

6. To add additional steps within each basic workflow, ensure the basic workflow step is checked and click the “+” icon at the end of that line to display a new sub-bureau step.

   **NOTE:** There can be up to three (3) total steps, inclusive of the basic workflow step, set up within each basic workflow step.

7. Click the Reviewers link.

8. Enter all or part of the Reviewer’s First Name, Last Name, and/or Email in the appropriate fields. A recommended best practice is to either filter by name or email, but not both.

9. Click the Search button.
10. From the updated **Search Results** table, click the **Select** button next to the user to be added. The user displays in the **Selected Reviewers** panel at the top of the **Select Reviewers** modal window. Close the modal window.

11. Once the reviewers are added, note that the exclamation mark icon disappears from the **Approval Steps** section. Click the **Submit** button to save your changes.

**UPDATE HISTORICAL AGENCY WORKFLOWS**

Agency Administrators can assign reviewers/certification managers to historical agency-specific workflows, including the Agency-Default, Bureau-Default, FAC-C, FAC-COR, FAC-P/PM, or Specialization workflows within each Bureau or at the Agency Level.

**NOTE:** You will only be able to manage historical workflows for which certification requests are currently present.

1. Navigate to **Manage System | Configuration | Manage Certification Approval Workflow**.

2. Select the **Inactive Workflows** radio button.

3. If not already indicated in **Agency** field, select an **Agency** from the drop-down list.

   **NOTE:** Stop sign icons will be present next to workflow(s) for which a reviewer/certification manager is not assigned to within the workflow.

4. Select a **Agency/Bureau Default or Certification/Specialization Program** to manage a workflow.

5. The most recent version of the selected workflow will populate into the right viewing pane of the screen. If you wish to assign/update reviewers to this workflow, select the step you desire to manage. If you desire to manage an older workflow, proceed to step 20.

6. Stop signs will again be located next to process steps which do not have a reviewer/certification manager assigned. Select the Workflow step which you desire to manage.

   **NOTE:** You will be able to update assigned reviewers/certification managers to steps which already have assigned reviewers/certification managers assigned, as long a certification request is currently in process within the historical workflow.

7. To update a Reviewer Step, select the **Reviewers** link next to the step you wish to manage.

8. Enter all or part of the Reviewer’s **First Name, Last Name**, and/or **Email** in the appropriate fields.

9. Click the **Search** button.

10. From the updated **Search Results** table, click the **Select** button next to the user to be added. The user displays in the **Selected Reviewers** panel at the top of the **Select Reviewers** modal window. Close the modal window.
11. Once the reviewers are added, note that the exclamation mark icon disappears from the Approval Steps section.

12. To update an Agency/Bureau Certification Manager Step, select the Agency or Bureau Certification Managers link next to the step you wish to manage.

13. Click the Certification Manager link within the modal window next to the Agency/Bureau/Sub Bureau Tier you wish to manage.

14. Select the Select User button.

15. Enter all or part of the Reviewer’s First Name, Last Name, and/or Email in the appropriate fields. A recommended best practice is to either filter by name or email, but not both.

16. Click the Search button.

17. From the updated Search Results table, click the Select button next to the user to be added. The user displays in the Add/Remove Agency/Bureau Certification Managers panel of the Add/Remove Managers modal window. Select the Add user as Bureau Certification Manager button.

   **NOTE:** Select the Manage Access by Certification button to manage the certification program access of all certification managers assigned to the indicated bureau/sub bureau.

18. Close the modal window.

19. Click the Submit button to save your changes.

20. To update an alternative Historical Workflow, select the Select a Different Version button in the right pane view.

21. Select the Date Range for the request you wish to manage.

22. Repeat steps 6-19.