

Job Aid: Add and Edit User Records

Course: Introduction to Plateau Learning Administration

Lab 1: Locate and View a User Record

Lab 2: Add a User Record

Prerequisite

- Introduction to Plateau Learning Administration
- Learning Needs Management

Description

The purpose of this job aid is to guide administrators through the step-by-step process of adding a new user record, editing a user record, and viewing a user record.

Tasks

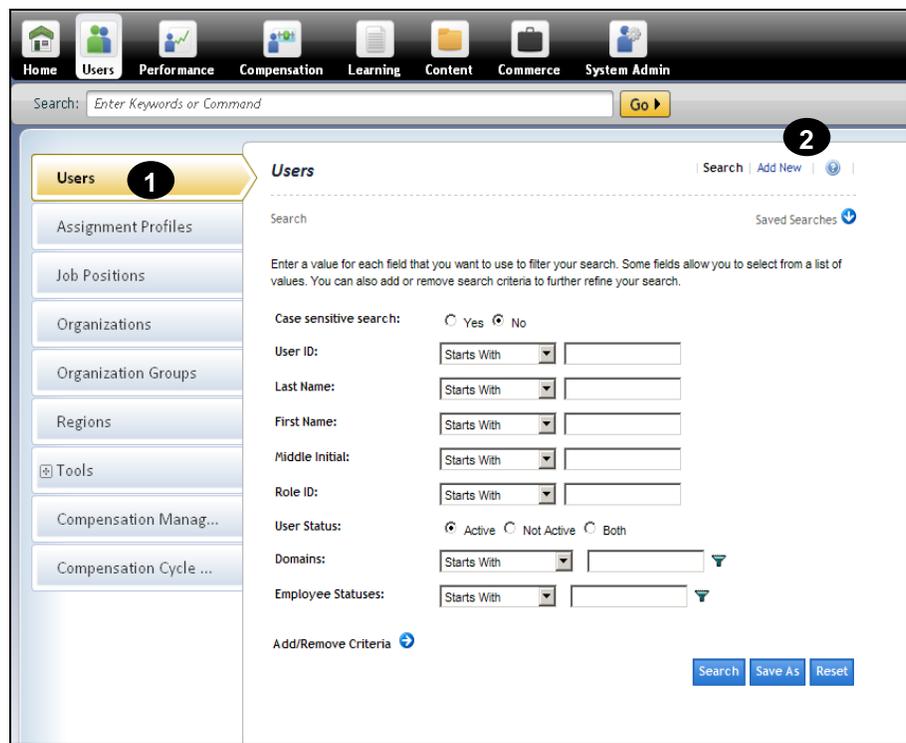
- Add New User Record
- Edit User Record
- View User Record

Task A. Add New User Record

Note: Verify the Admin tab is selected.

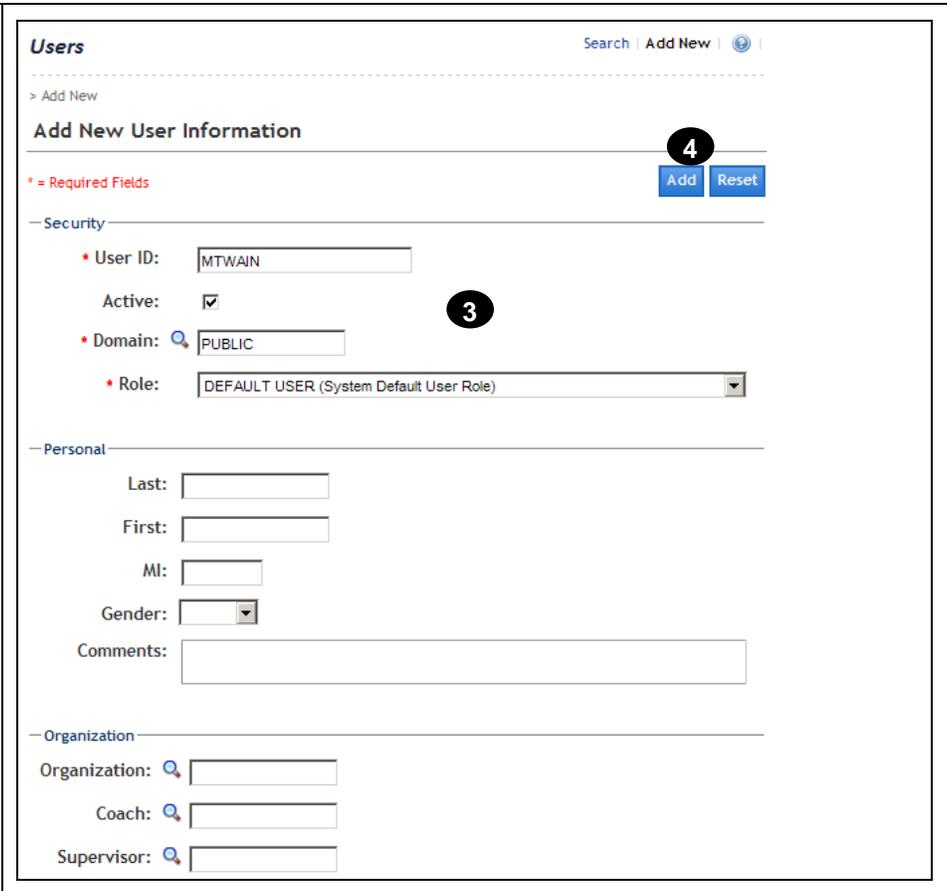
1 Navigate to Users> Users.

2 Select the Add New link.



3 Enter a new user ID, domain, and role (mandatory fields). Additional information can be added as determined by the best practices established within your organization.

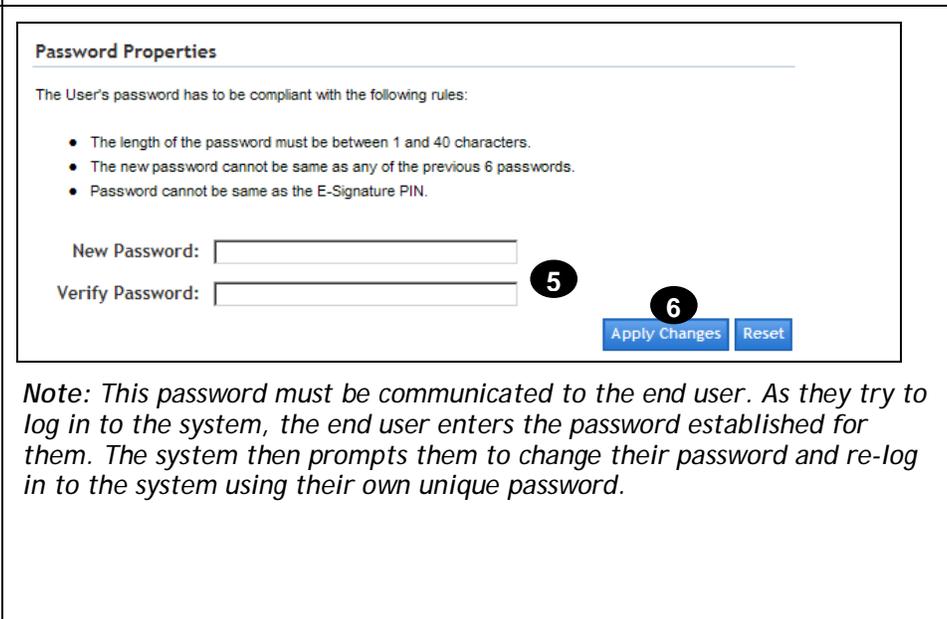
4 Once the user information is entered, select **Add**.



Unless a global setting has been established for user passwords, the system requires you to manually enter a password default for each user.

5 Scroll to the bottom of the **Summary** tab and enter the new password in the New Password textbox. Enter it again in the Verify Password textbox.

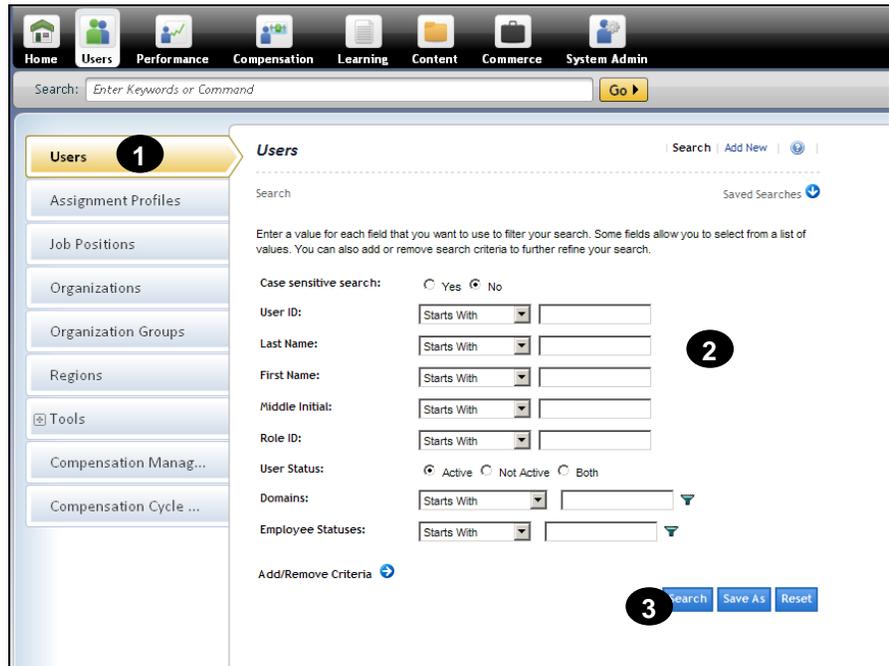
6 Select **Apply Changes**.



Note: This password must be communicated to the end user. As they try to log in to the system, the end user enters the password established for them. The system then prompts them to change their password and re-log in to the system using their own unique password.

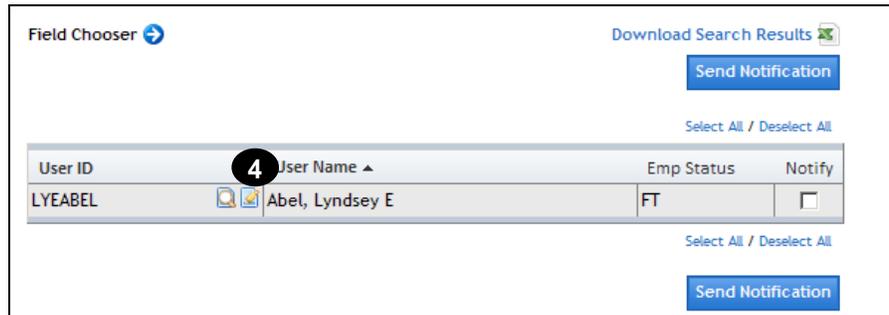
Task B. Edit User Record

- 1 Navigate to Users > Users.
- 2 Enter a user ID, or other search criteria to find the record you wish to edit.
- 3 Select Search.



The screenshot shows the 'Users' search interface. On the left, a navigation menu has 'Users' selected and highlighted with a circled '1'. The main area is titled 'Users' and contains search filters. A search bar at the top has the placeholder 'Enter Keywords or Command'. Below it, there are search criteria fields: 'User ID', 'Last Name', 'First Name', 'Middle Initial', and 'Role ID', each with a 'Starts With' dropdown and an input field. A circled '2' is placed next to the 'Last Name' field. There are also radio buttons for 'Case sensitive search' (Yes/No) and 'User Status' (Active/Not Active/Both). At the bottom, there are 'Search', 'Save As', and 'Reset' buttons, with the 'Search' button circled with a '3'.

- 4 Once the user is displayed, select the edit icon (🔗).



The screenshot shows the 'Field Chooser' table with search results. The table has columns: 'User ID', 'User Name', 'Emp Status', and 'Notify'. The first row contains the data: 'LYEABEL', 'Abel, Lyndsey E', 'FT', and a checkbox. A circled '4' is placed over the edit icon (🔗) next to the 'User Name' column. Above the table are buttons for 'Download Search Results', 'Send Notification', and 'Select All / Deselect All'.

User ID	User Name	Emp Status	Notify
LYEABEL	Abel, Lyndsey E	FT	<input type="checkbox"/>

- 5** Edit the user information as appropriate.
- 6** Select **Apply Changes** to save changes.

User ID: LYEABEL

Name: Abel, Lyndsey E

Edit the User Information

6

* = Required Fields [Apply Changes](#) [Reset](#) [Launch Proxy ...](#) [Copy...](#) [Delete](#)

— Security —

User ID: LYEABEL

Related Admin: jdg

Active:

* Domain:

* Role:

— Personal —

Last: **5**

First:

MI:

Gender:

Comments:

Task C. View User Record

- 1 Navigate to Users > Users.
- 2 Enter a user ID, or other search criteria to find the record you wish to edit.
- 3 Select Search.



Home Users Performance Compensation Learning Content Commerce System Admin

Search:

Users 1

Assignment Profiles
Job Positions
Organizations
Organization Groups
Regions
Tools
Compensation Manag...
Compensation Cycle ...

Users Search Add New Saved Searches

Search

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search: Yes No

User ID:

Last Name:

First Name: 2

Middle Initial:

Role ID:

User Status: Active Not Active Both

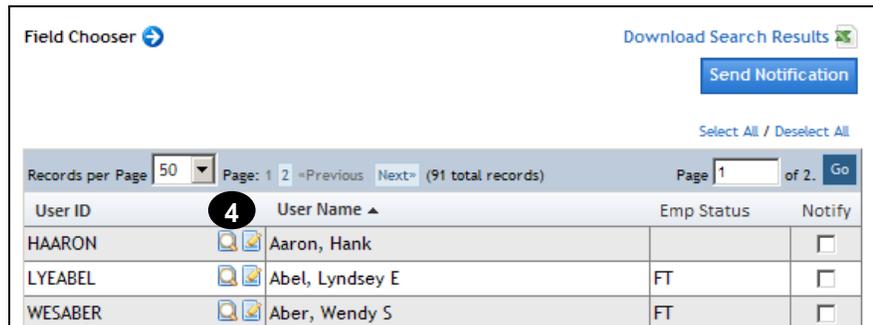
Domains:

Employee Statuses:

Add/Remove Criteria

3

- 4 Once the user is displayed, select the View icon (🔍).



Field Chooser Download Search Results Send Notification

Select All / Deselect All

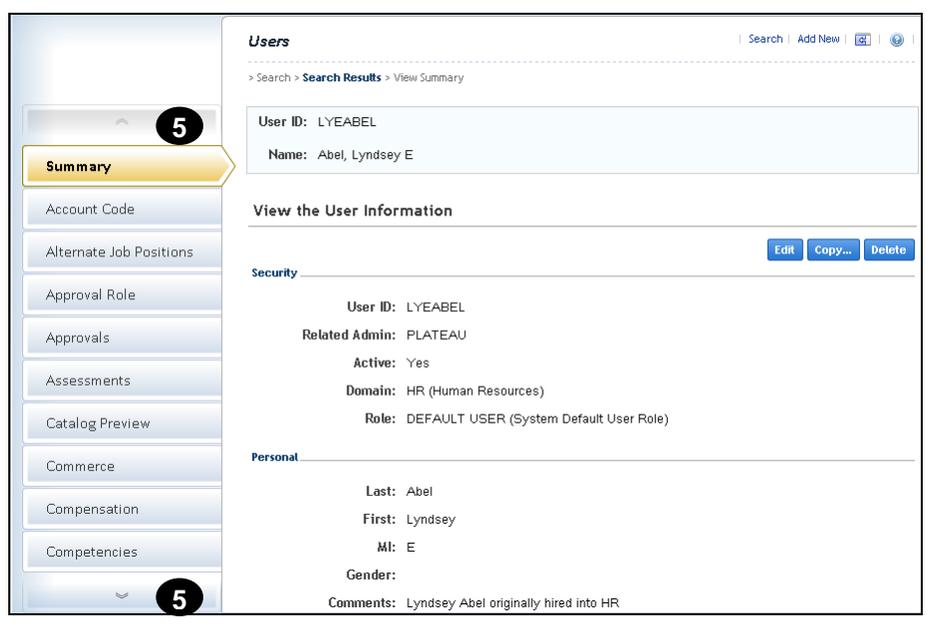
Records per Page 50 Page: 1 2 «Previous Next» (91 total records) Page 1 of 2. Go

User ID	User Name	Emp Status	Notify
HAARON	Aaron, Hank		<input type="checkbox"/>
LYEABEL	Abel, Lyndsey E	FT	<input type="checkbox"/>
WESABER	Aber, Wendy S	FT	<input type="checkbox"/>

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5 By default, the Summary tab displays.

5 Select the up and down arrows to view other tabs, including Learning Plan, Learning History, and Curricula.



Users | Search | Add New | [Print] | [Refresh]

> Search > Search Results > View Summary

User ID: LYEABEL
Name: Abel, Lyndsey E

View the User Information [Edit] [Copy...] [Delete]

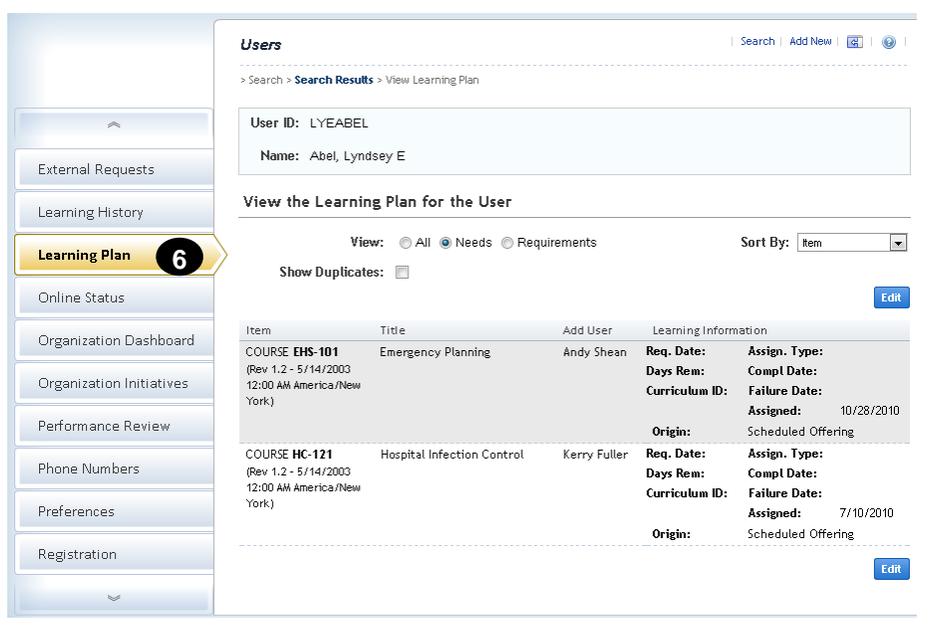
Security

User ID: LYEABEL
Related Admin: PLATEAU
Active: Yes
Domain: HR (Human Resources)
Role: DEFAULT USER (System Default User Role)

Personal

Last: Abel
First: Lyndsey
M: E
Gender:
Comments: Lyndsey Abel originally hired into HR

6 Select the Learning Plan tab to view currently assigned items.



Users | Search | Add New | [Print] | [Refresh]

> Search > Search Results > View Learning Plan

User ID: LYEABEL
Name: Abel, Lyndsey E

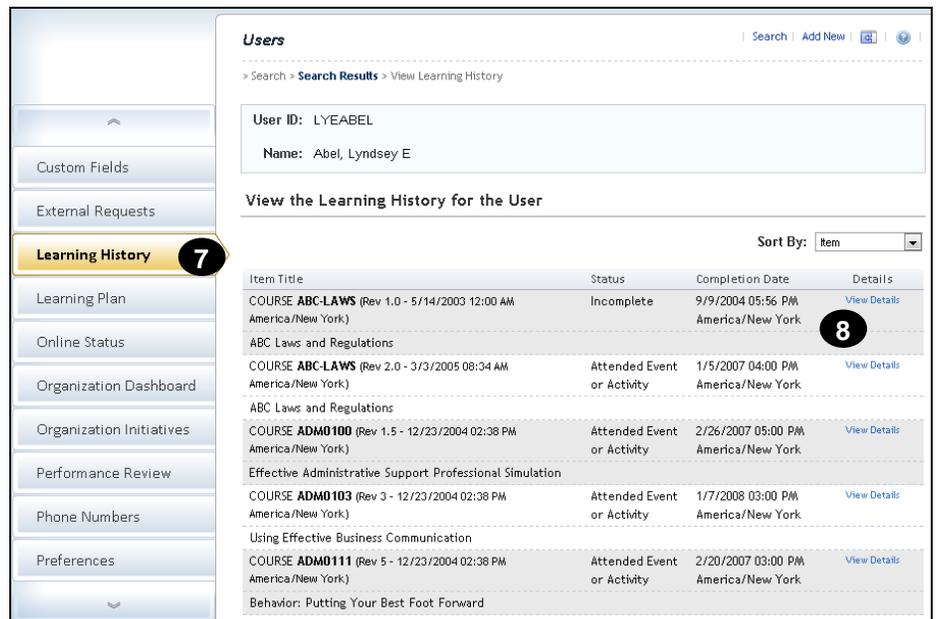
View the Learning Plan for the User

View: All Needs Requirements Sort By: Item [v]

Show Duplicates:

Item	Title	Add User	Learning Information
COURSE EHS-101 (Rev 1.2 - 5/14/2003 12:00 AM America/New York)	Emergency Planning	Andy Shean	Req. Date: Days Rem: Curriculum ID: Failure Date: Assigned: 10/28/2010 Origin: Scheduled Offering
COURSE HC-121 (Rev 1.2 - 5/14/2003 12:00 AM America/New York)	Hospital Infection Control	Kerry Fuller	Req. Date: Days Rem: Curriculum ID: Failure Date: Assigned: 7/10/2010 Origin: Scheduled Offering

- 7 Select the **Learning History** tab to view completed items.
- 8 Select the **View Details** link to view additional information about the completed item including instructor, completion status, and hours.



Users | Search | Add New | [?] | [i]

> Search > Search Results > View Learning History

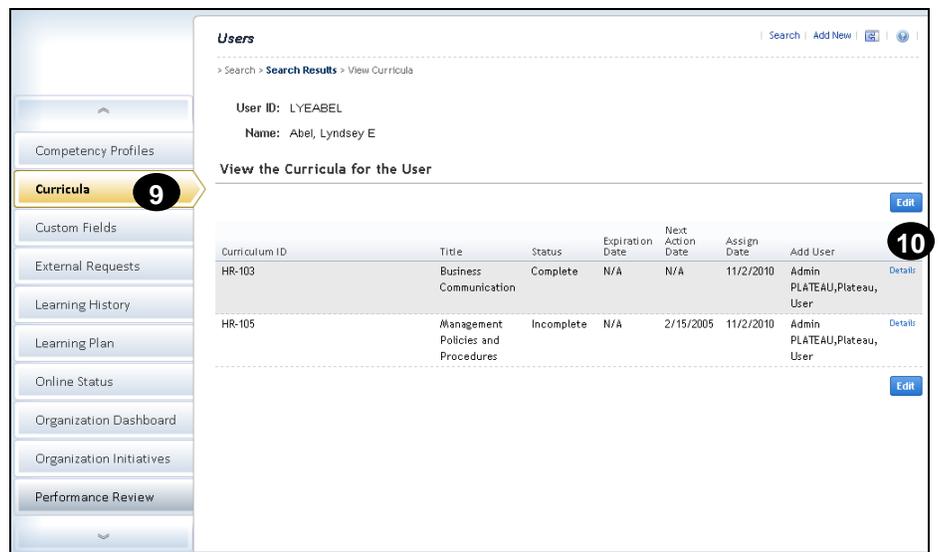
User ID: LYEABEL
Name: Abel, Lyndsey E

View the Learning History for the User

Sort By: Item

Item Title	Status	Completion Date	Details
COURSE ABC-LAWS (Rev 1.0 - 5/14/2003 12:00 AM America/New York)	Incomplete	9/9/2004 05:56 PM America/New York	View Details
ABC Laws and Regulations			
COURSE ABC-LAWS (Rev 2.0 - 3/3/2005 08:34 AM America/New York)	Attended Event or Activity	1/5/2007 04:00 PM America/New York	View Details
ABC Laws and Regulations			
COURSE ADMO100 (Rev 1.5 - 12/23/2004 02:38 PM America/New York)	Attended Event or Activity	2/26/2007 05:00 PM America/New York	View Details
Effective Administrative Support Professional Simulation			
COURSE ADMO103 (Rev 3 - 12/23/2004 02:38 PM America/New York)	Attended Event or Activity	1/7/2008 03:00 PM America/New York	View Details
Using Effective Business Communication			
COURSE ADMO111 (Rev 5 - 12/23/2004 02:38 PM America/New York)	Attended Event or Activity	2/20/2007 03:00 PM America/New York	View Details
Behavior: Putting Your Best Foot Forward			

- 9 Select the **Curricula** tab to view assigned curricula and current status.
- 10 Select the **Details** link to view for each item the completion status and date, possible failure date, and any related retraining dates.



Users | Search | Add New | [?] | [i]

> Search > Search Results > View Curricula

User ID: LYEABEL
Name: Abel, Lyndsey E

View the Curricula for the User

Curriculum ID	Title	Status	Expiration Date	Next Action Date	Assign Date	Add User	Details
HR-103	Business Communication	Complete	N/A	N/A	11/2/2010	Admin PLATEAU, Plateau, User	Details
HR-105	Management Policies and Procedures	Incomplete	N/A	2/15/2005	11/2/2010	Admin PLATEAU, Plateau, User	Details

Notes