

ILEARNOREGON MANAGING USERS

Create A New User Account

IMPORTANT INFORMATION FOR STATE EMPLOYEES

In to create a new account you must know the user's first and last name exactly as it appears on their paycheck stub; or you must know their Employee Identification Number (i.e. OR1234567).

When you are selecting the user's job title, you may see the same one multiple times but with a different job classification code. You will need to know the user's job classification code so that you can select the correct job title.

To create a new account, complete the following steps:

1. In your web browser type in the following URL <https://ilearn.oregon.gov>.
2. Once you are logged in, select **Administration**.
3. Select **Manage Users**. This will take you to the Manage Users page. Before creating a new account search to make sure they do not already have one.
4. Click **Go** next to Create New Account. This will take you to the Manage User: Add New User screen.

Administrator | IDP Coach

To perform a search, enter some or all of the specific criteria indicated below and then click Search. Use the Page menu to perform other tasks.

Last Name

First Name

Expertise

Professional Experience

Search Type All words

Job Title

City

U.S. State

Non-U.S. State/Province

Country

Activity

User Search This Domain Only

Create New Account **Go**

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- From the User Information page you will need to select one of the following options for type:
 - Select State Employee if the user has a valid state issued email address (i.e. jane.doe@state.or.us)
 - Select State Employee with Non-State Email if the user doesn't have a valid state issued email address or would like to use an alternative email address.
 - Select Not a State Employee if the user is not an employee of the state of Oregon.

* Type: State Employee
 State Employee using a non-State email
 Not a State Employee

- Enter the user's *full first* and *last name*.
- Click on the **Find It** button next to the Employee ID field. Once the user's record is found, the system will automatically populate the user's Employee ID and email address. Verify that the user's email address is correct. **NOTE:** Email addresses should be entered using the user's public email address and not their agencies internal email address. For example: yourname@state.or.us instead of yourname@odf.state.or.us.
- Enter text for the user's **Login ID**. **NOTE:** The login must be at least 6 characters and cannot contain spaces or characters such as /, @, or &.

* First Name:

* Last Name:

Middle Name/Init:

* Employee ID:

* Email:

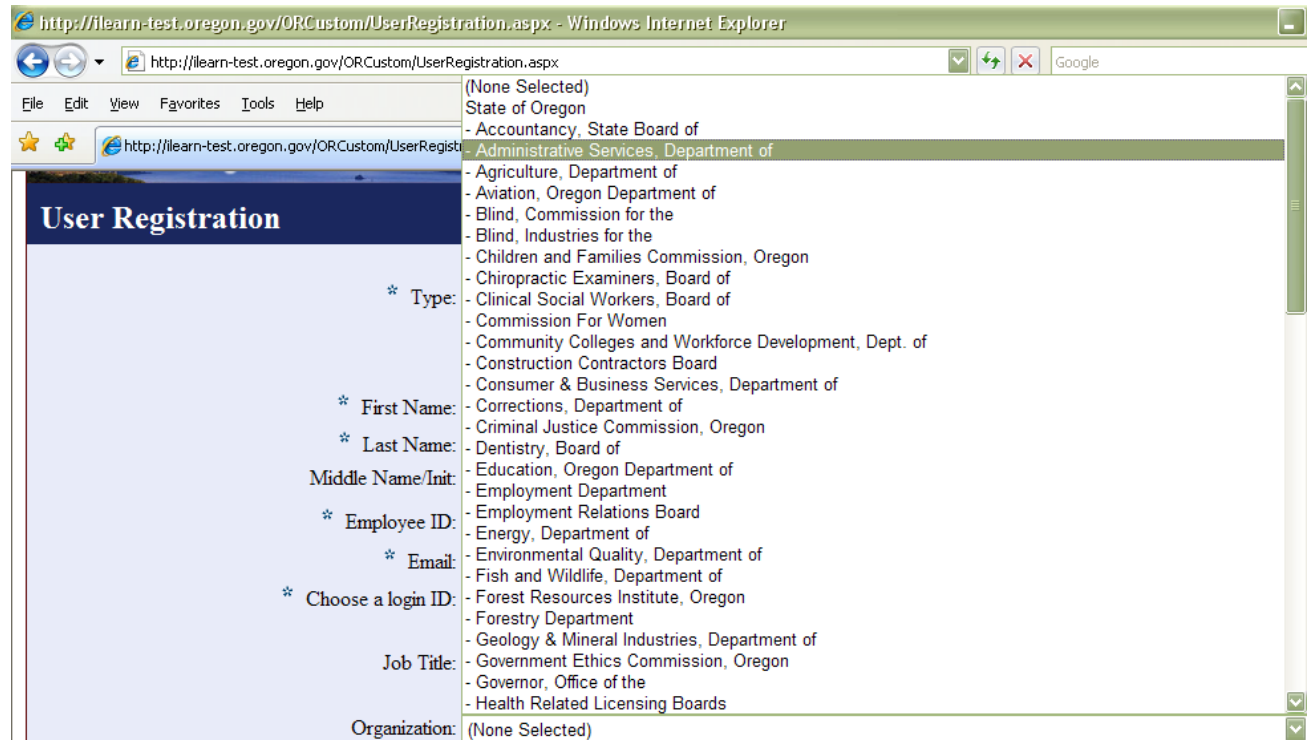
* Choose a login ID:

- Using the drop down menu, select the user's **Job Title**. The job titles come from the State's Position and Personnel Data Base (PPDB) and are in alphabetical order.

Job Title:

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10. Using the drop down menu, select which *state agency* the user works for.



11. Once you select the user's agency, a listing of their agencies divisions/sections/units will display. Select the appropriate one by clicking on the name.



12. Using the drop down menu, see if the user's manager is listed. If the user's manager is listed, click on the managers name. If the manager isn't listed, select *(None Selected)*.



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13. Click *Submit*.



A confirmation email will be sent to the email address provided. Please follow the instructions in the email to confirm your account registration.

The confirmation email will only be active for 1 day.

The user will receive an email with instructions on how to confirm their account.

Managing Users

The following section provides step-by-step instructions for how an Administrator can create a new password, edit a users activity, edit a users Login ID, edit a users profile, manage a users personal learning events, perform a proxy login, send an email to a user, set a users primary domain, view a users transcript, and create a new account.

To manage a user:

1. In your web browser type in the following URL <https://ilearn.oregon.gov>.
2. Once you are logged in, select **Administration**.
3. Select **Manage Users**. This will take you to the Manage Users page.
4. Search for the user.
5. Once you find the user you want to manage, you will select the drop-down menu underneath the Action header.

The screenshot shows the 'Manage Users' interface. At the top, there are tabs for 'Administrator' and 'IDP Coach'. Below the tabs, a search instruction reads: 'To perform a search, enter some or all of the specific criteria indicated below and then click Search. Use the Page menu to perform other tasks.' The search form includes fields for 'Last Name' (containing 'meng'), 'First Name', 'Expertise', 'Professional Experience', 'Search Type' (set to 'All words'), 'Job Title', 'City', 'State', 'Country', 'Activity', and 'User Search' (set to 'All Domains'). A 'Search' button is located below the form. To the right of the search fields is a 'Create New Account' button with a dropdown arrow and a 'Go' button. Below the search form, a table displays the search results. The table has columns for 'Last Name', 'First Name', 'Job Title', 'Location', 'Activity', and 'Action'. One record is shown for 'Meng Brandy', with job title 'Hr Consultant 2 - X1327', location 'Salem OR', and activity 'Active'. The 'Action' column for this record contains a dropdown menu with 'Create Password' selected and a 'Go' button.

Last Name	First Name	Job Title	Location	Activity	Action
Meng	Brandy	Hr Consultant 2 - X1327	Salem OR	Active	Create Password <input type="button" value="Go"/>

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To create a temporary password:

6. Once you find the user you want, under the Action header select **Create Password**.
7. Click **Go** to access the Create Temporary Password page.
8. From the Create Temporary Password page, click **Create** to change the user's current password to a system-generated temporary password that will be automatically emailed to the user.

Records found: 1						
	Last Name	First Name	Job Title	Location	Activity	Action
	Meng	Brandy	Hr Consultant 2 - X1327	Salem OR	Active	<div style="border: 1px solid gray; padding: 2px;"> Create Password Go </div> <ul style="list-style-type: none"> Create Password Edit Activity Edit Coaching Roster Edit Login ID Edit Peers Edit Profile Manage Personal Learning Events Proxy Login Select Primary Domain Send Email View Transcript

NOTE: When an administrator creates a temporary password an email is sent that contains a system-generated temporary password to a user who has forgotten their password. The user's current password is automatically changed to a temporary password. When the user receives the email, they log in with the same Login ID and use the new temporary password. After the user clicks Login from the Login page, they are taken to the Edit Password page.

Brandy Meng

Create Temporary Password

Click Create to change the user's current password to a system-generated temporary password that will be automatically emailed to the user.

Create Return

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To make a user inactive:

1. Once you find the user you want, under the Action header select **Edit Activity**.
2. Click on **Go** to access the Edit Activity page.
3. From the Edit Activity page you can:
 - Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
 - Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
 - Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
4. Click **Save** (message displays indicating the activity was saved).

Edit Activity | Comments

Select an activity level. If you want to enter a specific date range for activity, use the calendar icon (auto-fills month/day/year and removes the checkmarks for no start and end dates) or use the menus and year field (click the checkboxes to remove the checkmarks for no start and end dates).

* **Activity** Inactive Active

Start Date Month Day Year 12:00 AM
 No Start Date

End Date Month Day Year Midnight
 No End Date

Save **Return**

NOTE: By default, after creating a new user they are automatically active for an indefinite period of time. Inactive users are stored in the system and are only viewable or searchable by authorized users when specifically searching for them using the advanced search. Edit Activity is a way to hide a user, and then you may unhide them at any time. If you want to make users inaccessible and still keep them in the system in case you want to use them again in the future, you change the Activity to "Inactive" as opposed to using the deletion process.

To edit a users login ID:

1. Once you find the user you want, under the Action header select **Edit Login ID**.
2. Click **Go** to access the Edit Login ID page.
3. Type the new Login ID in the "New Login ID" field. The user's current Login ID should be displayed in the Current Login ID field. When creating the login ID, the following special characters can be used: @, #, [, ^, \$, ., |, ?, *, +, (,),], {, }, and \.
4. Click **Save**. The Manage User's page displays with a message indicating the user's Login ID was updated.

Edit Login ID

Type a new Login ID for the user. Click Save when finished.

* **Current Login ID**

* **New Login ID**

Save **Return**

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To edit a user's profile:

1. Once you find the user you want, under the Action header select **Edit Profile**.
2. Click **Go** to access the Edit Profile page.
3. From the Edit Profile page you can edit a user's information by clicking on any of the following tabs:
 - **Contact**: This is where you edit a user's contact information (i.e. phone number, email address, etc.)
 - **Manager**: This is where you select a user's manager.
 - **Organization**: This is where you select a user's organization that they work in.
 - **Job Title**: This is where you select a user's job classification.
 - **Professional**: This is where you enter job and career-related information for the user.
 - **Preferences**: This is where you select preferences for how a user will view the information in the system (i.e. records per page, skin, time zone, etc.).
4. Click **Save** after you make changes to any of the tabs on the Edit Profile page.

Contact | Manager | Organization | Job Title | Professional | Preferences

Edit Contact Information | Preview

Edit your contact information. An asterisk (*) indicates required information. Click Save to save your changes.

* **First Name** Brandy

* **Last Name** Meng

Middle Name

* **Email Address** brandy.l.meng@state.or.us

Work Phone 503-378-4843 Ext.

Home Phone

Mobile Phone 503-779-8604

Fax

Address 155 Cottage Street SE U30

City Salem

Province

State Oregon

Country UNITED STATES

Postal Code 97301

Save | Return

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To add a personal learning event:

Personal learning events are activities that occur outside of iLearnOregon (e.g., college courses, on-the-job training, conferences, etc.).

1. Once you find the user you want, under the Action header select ***Manage Personal Learning Events***.
2. Click ***Go*** to access the Manage Personal Learning Event page. From this page you can search for personal learning events that have been added to the user's transcript or you can create a new personal learning event.

Manage Personal Learning Events

Simple | Advanced

To perform a search, type keywords in the Search Text field. Select items from other search criteria options to refine the results and then click Search. Use the Advanced tab to select criteria to further refine the results.

User Name Brandy Meng Create New Learning Event **Go**

Search Text

Search Type Any words

Search

3. Select ***Create New Learning Event*** from the page menu.
4. Click ***Go*** to access the Edit Learning Event page.
5. From the Edit Learning Event page you need to add the following information (Only fields with a * have to be completed):
 - ***Learning Event Title:** The name of the learning event.
 - ***Learning Event Type:** The classification for the learning event.
 - ***Training Sponsor:** Indicates the name of the organization that offered the training.
 - ***Start Date:** Indicates the date you started the learning event.
 - **Complete Date:** Indicates the date you completed the learning event.
 - ***Score:** Indicates your final score for the learning event.
 - **Progress Status:** Indicates if you have started or completed the learning event.
 - **Credit Type:** Indicates the type of credit received for this learning event.
 - **Credit Hours:** Indicates the number of credit hours completed for this learning event.
 - **Certification:** Indicates if a certification is awarded for completing this personal learning event.
 - **Training Details:** Additional information about the learning event.

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11. Click *Create* after you are done adding the information for the learning event.

Edit Personal Learning Event Preview

Type new or change existing summary information about this item. The system also uses summary information to find the item when users perform searches.

* **Learning Event Title**

* **Learning Event Type** Certification

* **Training Sponsor**

* **Start Date** Month Day Year 12:00 AM

Complete Date Month Day Year 12:00 AM

Score

Progress Status Completed Started

Credit Type

Credit Hours

Certification Yes No

Training Details

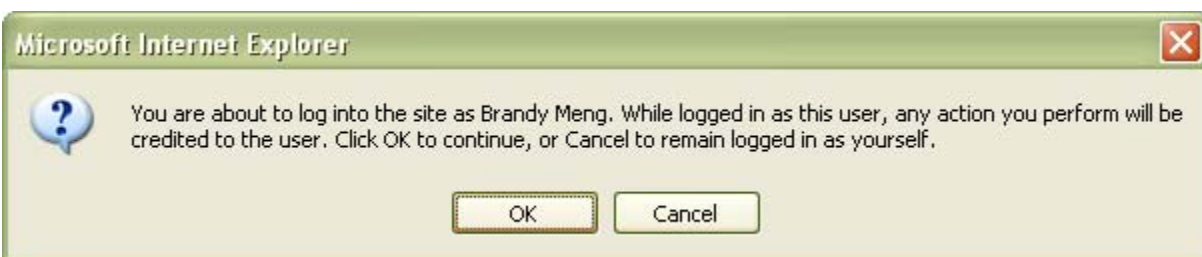
Create Cancel

NOTE: Personal learning events are added to the selected user's transcript. Personal learning events are specific to each user. When one is created, it only exists for the user for whom it was created.

To proxy login into a user's account:

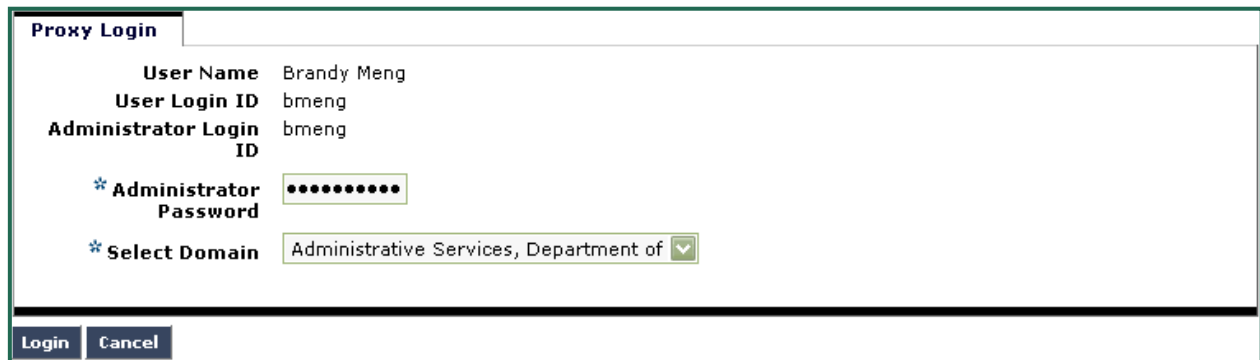
Proxy Login is where an Administrator can log in as another user. When logged in as another user, the authorized user is a proxy for the user and the user experience (permissions, domain membership, access to menu items, etc.) is exactly as it is when the user logs into the site as themselves.

1. Once you find the user you want, under the Action header select *Proxy Login*.
2. Click *Go* to access the Proxy Login page.
3. Once you select go, you will get a pop-up asking if you want to continue or cancel the proxy login. Click *OK* to continue.



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4. Type in your password.
5. Select the user's domain that you want to proxy into.
6. Click *Login*.



Proxy Login

User Name Brandy Meng
User Login ID bmeng
Administrator Login ID bmeng

* **Administrator Password** [Masked]

* **Select Domain** Administrative Services, Department of [Dropdown]

Login **Cancel**

NOTE: After you are logged in as another user:

- Your original session is terminated.
- You are logged into the system as the selected user in the same window.
- You can perform tasks and act on behalf of the user.
- The system records any tasks you complete as if the user him/herself for whom they have logged in is completing the tasks.

When the Administrator performs a proxy login for another user, the system stores the following information:

- Authorized User
- End User
- Date/Time authorized user performed a proxy login

A new record is created each time a proxy login occurs.