



Managing Accounts - Manage Users

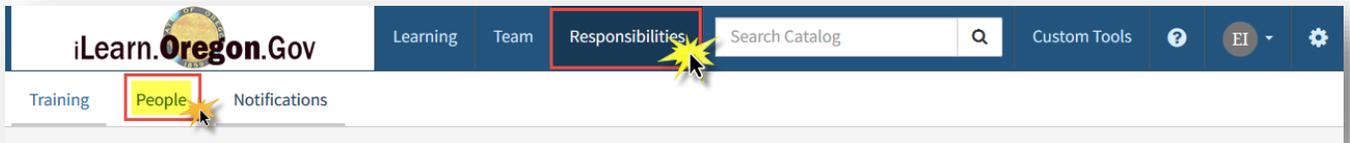
This job aid provides you with the steps to manage an End User account.

You must have the **Administrator Role** to perform the following tasks. To obtain an Administrator Role for your agency you must request permission from your established agency [iLearn Administrator](#). If your agency does not have a designated iLearn Administrator contact the System Administrator at iLearnOregon@oregon.gov or call 503-378-6329.

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Responsibilities

From your homepage go to Responsibilities → People



Search for the account you want to manage. If the individual does not have an account, see the [“Create an account for a new user”](#) section.



Manage User Accounts

Locked	Last Name	First Name	Job Title	Location	Activity	Action	Info
1	Rose	Autumn	No job title		2 Active	3 Create Password [dropdown] Go	4

1. Locked: If the account is locked you will see this logo:



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2. Activity: If an account is Inactive, Manage Users and Merge Users are the only places you will see these accounts.

3. Action:

- Create Password
- Edit Activity
- Edit Login ID
- Edit Profile
- Login Assistance
- Proxy Login
- Select Primary Domain
- Send Email
- Unlock Account
- View Transcript

4. Information:

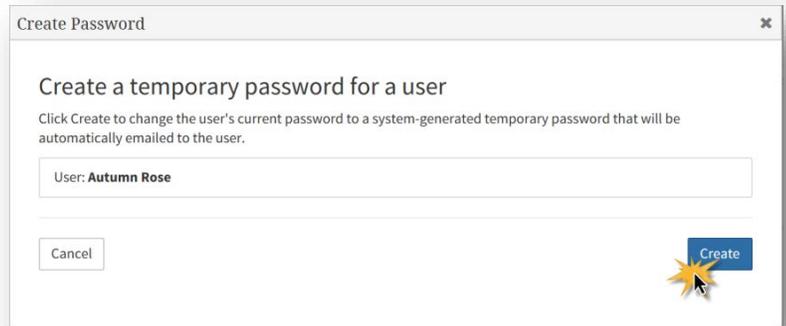
Information	
Rose, Autumn	
Unique ID:	CT0119866
Email Address:	emailme@oregon.gov
Work Phone:	Ext.:
Job Titles:	No job title (Primary)
Managers:	
Organizations:	Other, Non State Employees (Primary)
Address:	
City:	

Action Menu

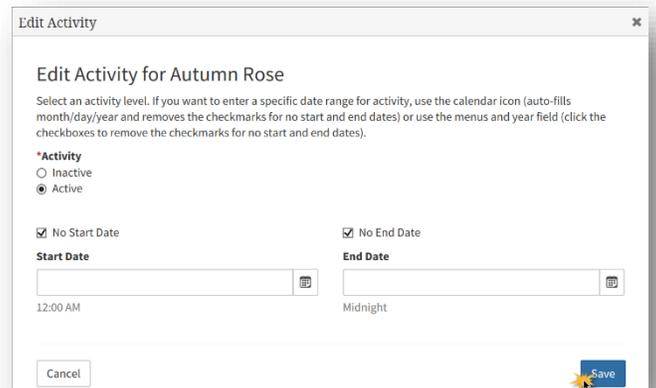
Select the action you want to do then *click* Go

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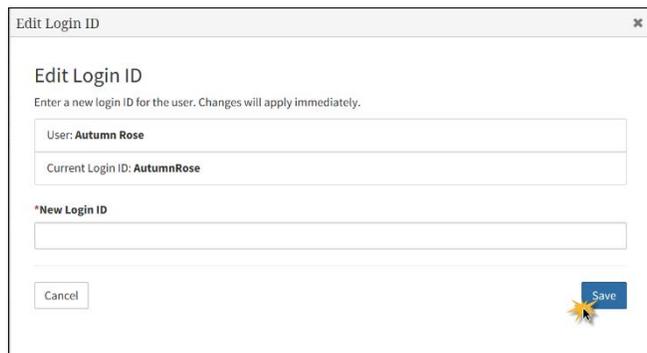
- **Create Password** – When you *click* **Create** a temporary password will be generated and sent via email to the user. If they do not have a valid email on file this option will not work you will need to *select* **Login Assistance**.



- **Edit Activity** – Use this action to *Activate* and *Inactivate* accounts. Only use the Radio Buttons, do not set Start and End Dates, *click* **Save**.



- **Edit Login ID** – Change the Login ID for an account, *click* **Save**.



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Edit Profile – This action allows you to edit several items in a user profile. In this version of iLearn when you are editing a User Profile it is the same as when an end user edits their profile.

The screenshot displays the user profile management interface for Autumn Rose. The interface is divided into several sections: Account, Profile, and Preferences. The Profile section is active and contains sub-sections for User Information, Work Information, Languages, Display, Privacy, and Communication. The User Information section shows fields for Name, Email Address, Work Phone, Home Phone, Mobile Phone, and Address. The Work Information section shows fields for Organizations, Job Titles, Job Start, Job End, Managers, Company, and Company Address. The Languages section shows fields for Region and Time Zone. The Display section shows fields for Accessibility and Theme. The Privacy section shows toggle switches for contact and professional information. The Communication section shows toggle switches for message delivery. The 'Edit Work Information' button is highlighted in blue.

1. Edit Work Information – To update the Job Title, Manager, and Organization you will *click* **Edit Work Information** in the “Work Information” section of this page.

The screenshot shows a close-up of the Work Information section. It contains the following fields: Organizations: Administrative Services, Department of (Primary); Job Titles: No job title (Primary); Job Start; Job End; Managers; Company; and Company Address. At the bottom of the section is a blue button labeled 'Edit Work Information'.

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- **Job Title** – *click Select Job Title*, search for the desired position/classification, *select* the radio button for the classification you desire, and *click Save*.

The screenshot shows the 'Work Information' form with three sections: 'Organizations', 'Job Titles', and 'Managers'. The 'Organizations' section is set to 'Administrative Services, Department of'. The 'Job Titles' section is currently set to 'No job title'. A 'Select Job Title' dialog box is open, showing a search for 'Accountant'. The search results list 'Accountant 1 - C1215' with a radio button selected. The 'Save' button is highlighted in red.

The screenshot shows the 'Work Information' form with the 'Managers' section highlighted. The 'Select Manager' button is highlighted with a red box.

- **Manager** – To update the Manager, click on the “Select Manager” button, search for the desired Manager, select the radio button for the desired Manager, and *click Save*.

The screenshot shows the 'Select Managers' dialog box with a search for 'Joyce Martinez'. The search results list 'Martinez, Joyce' with a radio button selected. The 'Save' button is highlighted in blue.

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- **Organization** – To update the Organization, *click Select Organization*, *search* for the desired Organization, *select* the radio button for the desired Organization, and *click Save*.

Work Information

Organizations Select Organization

Administrative Services, Department of
Primary

Select Organizations

Select an item from search results, then select Save.

Find Organization: Search Type: Any words

Organizations	Path
<input type="radio"/> 211 DAS Business Services (DBS)	State of Oregon > Administrative Services, Department of > Office of the Chief Financial Officer (CFO) > 200 CFO Administration
<input type="radio"/> 401 DAS Information Technology (CIO)	State of Oregon > Administrative Services, Department of > Chief Administrative Officer
<input checked="" type="radio"/> Office of the DAS Director	State of Oregon > Administrative Services, Department of

- **Login Assistance** – Use this to reset a password for an account without a valid email address, *click Create*.

Login Assistance

Generate a temporary password for the user. The user should write this password down, as there will be no email including this temporary password.

User: **Autumn Rose**

Login ID: **AutumnRose**

When the window closes, look at the top of the screen for the temporary password that can be given over the phone or sent in an email by you.

DAS DEPARTMENT OF ADMINISTRATIVE SERVICES

Learning Responsibilities Search Catalog Custom Tools IS

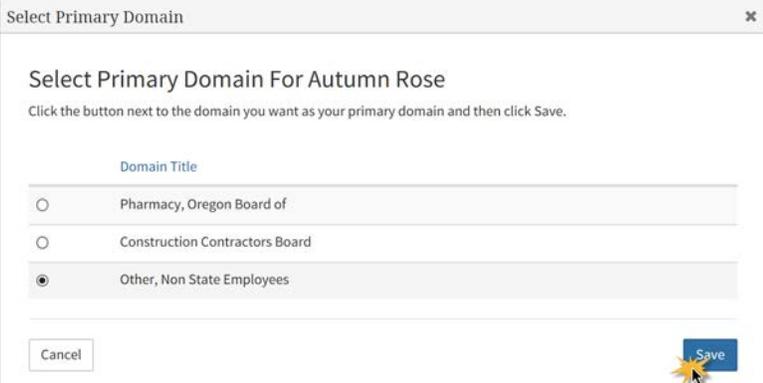
Training People Notifications

✓ The user's temporary password is: 876F2BFEEC. Note: No email will be sent to the user.

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Select Primary Domain – When an account has dual domain memberships it may be necessary to select the primary domain if the wrong one is selected or there isn't a primary domain identified. The indication of no account assigned is there will be a Meridian Global banner at the top of the screen and they cannot access any training.

Select the correct domain then *click* **Save**.



The screenshot shows a dialog box titled "Select Primary Domain" with a close button (X) in the top right corner. The main heading is "Select Primary Domain For Autumn Rose". Below this, there is a instruction: "Click the button next to the domain you want as your primary domain and then click Save." Underneath, there is a section labeled "Domain Title" with three radio button options: "Pharmacy, Oregon Board of", "Construction Contractors Board", and "Other, Non State Employees". The "Other, Non State Employees" option is selected. At the bottom left is a "Cancel" button, and at the bottom right is a "Save" button with a mouse cursor hovering over it.

- **View Transcript** – From here you will be able to view, edit, save, and print user transcripts.

1 All Training Curriculums External Learning Required Training Certifications More Information ▾

Learning History (2) Print Save as PDF

2 Type: All Training Status: All From: To: Filter

Title	Type	Status	Score	Start Date	Completion Date	Expiration Date	Credits	Action
DAS - CHRO - Maintaining a Harassment Free and Professional Workplace*	Online	Completed	100.00	6/28/2018	6/28/2018			Update Score ▾ Go
DAS - CHRO - Preventing Sexual Harassment*	Online	Started		6/28/2018				Update Score Mark Complete Delete Progress Progress History

3

Back

1. Break down the type of training you are wanting to look at by All Training, Curriculum, External Learning, Required Training, Certifications, or More Information (Waived Prerequisites, Required Training Exemptions, Expired Incomplete Content, or View PDF Files and Notes)
2. Filter the transcript by Training Type, Status, and Date. *Click Filter.*
3. In the Action menu you can select what action you would like to complete for the training.

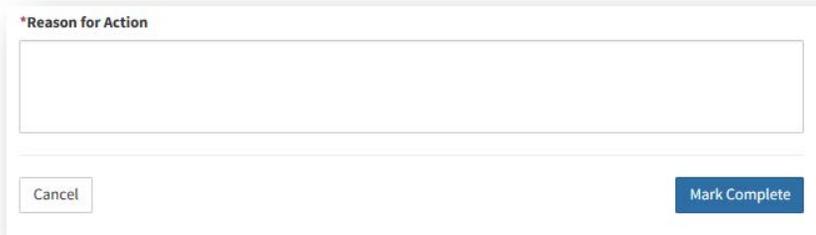
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Transcript Action Menu

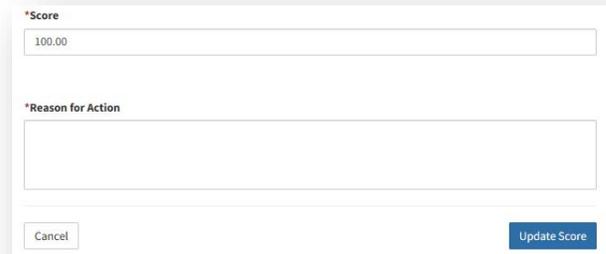
Select the action you want to do then *click Go*

If you are manually marking an online course complete with a score you **MUST** do it in the proper order, fist Mark Complete *then* Update Score:

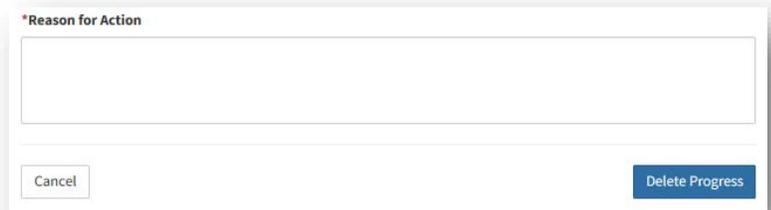
1. **Mark Complete** – Input the reason for marking complete and *click Mark Complete*.



2. **Update Score** – Input the desired score, reason for action and *click Update Score*.



- **Delete Progress** – (For Incomplete Training Only) Input the reason and *click Delete Progress*.



3. **Progress History** – Here you can view all of the completions and/or changes that have been made to the training record.

Date	Action taken	Action taken by	Reason
6/28/2018	Update Score	iLearn Support	TEST
6/28/2018	Mark Complete for user	iLearn Support	TEST

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Create an account for a new user

Click Create an account for a new user.

State Employee Account

State employee accounts should automatically be created through PPDB, only do this if there was an error and the account was not automatically created.

All items with * are required information.

1. Select State Employee.
2. Enter name.
3. Enter Employee ID (OR#) and click **Find it**, this can populate the email field.
4. Enter the employees email address here if it doesn't populate from the OR#.
 - a. An email address can only be used one time and must match the PPDB record.
5. Choose a login ID. (must be unique)
6. Select Job Title.
 - a. This is not mandatory, if you search and do not find an appropriate title, just leave this blank.
7. Select Organization.
8. Select a manager if one is available. If none appear, leave blank.
9. Click **Submit**.

users.

Create an account for a new user

First Name

User Search

* Type: **1** State Employee
 State Employee using a non-State email
 Not a State Employee

* First Name: **2**

* Last Name:

Middle Name/Init:

* Employee ID: **3** **Find It**

Email: **4** **Fake It**

* Choose a login ID: **5**

Job Title: **6**

Organization: **7**
Administrative Services, Department of
- Chief Administrative Officer
- 401 DAS Information Technology (CIO)
- 402 Technology Support Center
- 403 Application Service Delivery
- Enterprise Goods & Services (EGS)
- 410 EGS Administration

Manager: **8**

9 **Submit**

Non-State Employee Account

All items with * are required information.

1. Select Not a State Employee.
2. Enter name.
3. Enter a valid email address.
 - a. An email address can only be used one time in iLearn.
4. Enter your Login ID. (must be unique)
5. Select Job Title.
 - a. This is not mandatory, if you search and do not find an appropriate title, just leave it blank.
6. Select Organization.
 - a. Creating the account in the Other, Non State Employees domain may not give access to the training needed.
7. Leave this blank.
8. Click **Submit**.

[Show Help](#)

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

* First Name: Jennifer

* Last Name: Jones

Middle Name/Init:

* Email: Jennifer.Jones@gmail.com

* Choose a login ID: JennyJones

Job Title: Volunteer - T0007

Organization: Other, Non State Employees

- Other, Non State Employees
 - Boards and Commissions
 - City Government (Partners)
 - City Government
 - County Government
 - Federal Government
 - Oregon Universities

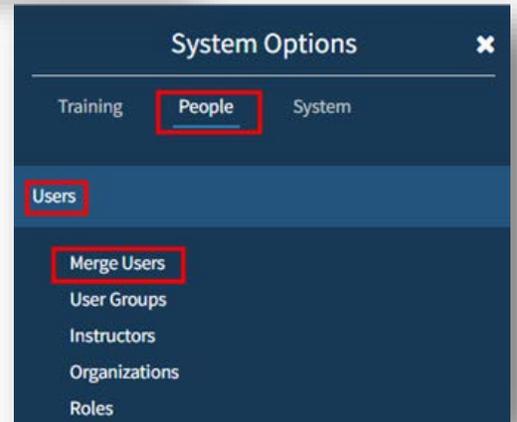
Manager: (None Selected)

Submit

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Merge User Accounts

Click on the **System** icon (⚙️) and a slide out menu to the right will appear. Click on **People**, then on **Users**, and finally click on **Merge Users**.



Search for the account you would like to be the primary account. This account will be the one that remains active.

Merge Users

Search for and select a primary and secondary user, and merge their information that is in the system.

Merge Users Merge History

Enter some or all of the specific criteria indicated below and click Search. Then click the button next to the user who will be the primary user for the merge, and click Select Primary User.

1

Last Name: account
First Name: y
User ID:
Login ID:
Activity:
User Search: All Domains

2 Search

Records found: 2

	Last Name	First Name	User ID	Login ID	Activity	
3	Account	Primary	CT0139369	MergeAccount1	Active	View Transcript
	Account	Secondary	CT0139370	MergeAccount2	Active	View Transcript

4 Select Primary User

If you are attempting to merge accounts from different domains you will need to Search "All Domains".

Select the radio button and click **Select Primary User**.

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Primary Account

Search for and select a primary and secondary user, and merge their information that is in the system.

Select Secondary User

Enter some or all of the specific criteria indicated below and click Search. Then click the button next to the user who will be the secondary user for the merge (this user will be deleted or made inactive after the merge, depending on the system's settings), and click Select Secondary User.

1

Last Name: account

First Name: y

User ID:

Login ID:

Activity:

User Search: All Domains

2 Search

Records found: 1

3

Last Name	First Name	User ID	Login ID	Activity	
Account	Secondary	CT0139370	MergeAccount2	Active	View Transcript

4 Select Secondary User

Repeat steps 1 – 4 to select the Secondary Account

Select the radio button and *click* Select Secondary User.

Primary Account

Review User Merge

Review the information for the primary and secondary user to ensure that you are merging the appropriate accounts. Enter a reason for merging the users in the Reason field and then click Merge Users.

Primary User

Last Name	First Name	User ID	Login ID	Activity	
Account	Primary	CT0139369	MergeAccount1	Active	View Transcript

Secondary User

Last Name	First Name	User ID	Login ID	Activity	
Account	Secondary	CT0139370	MergeAccount2	Active	View Transcript

Reason: duplicate accounts

Check Spelling

Merge Users

Enter the **reason** for the merge.

Click **Merge Users** to merge the accounts.

Click **OK** on the popup window to finalize the merge.

