iLearn Oregon

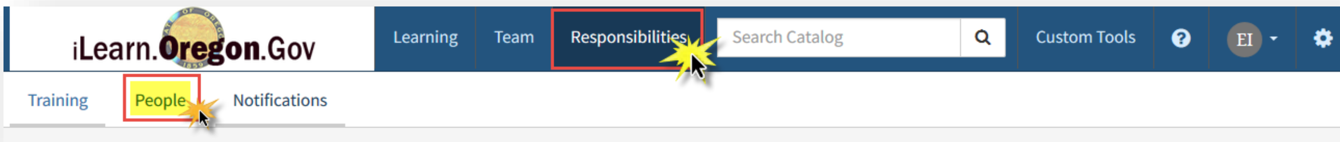
Managing Accounts – Manage Users

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

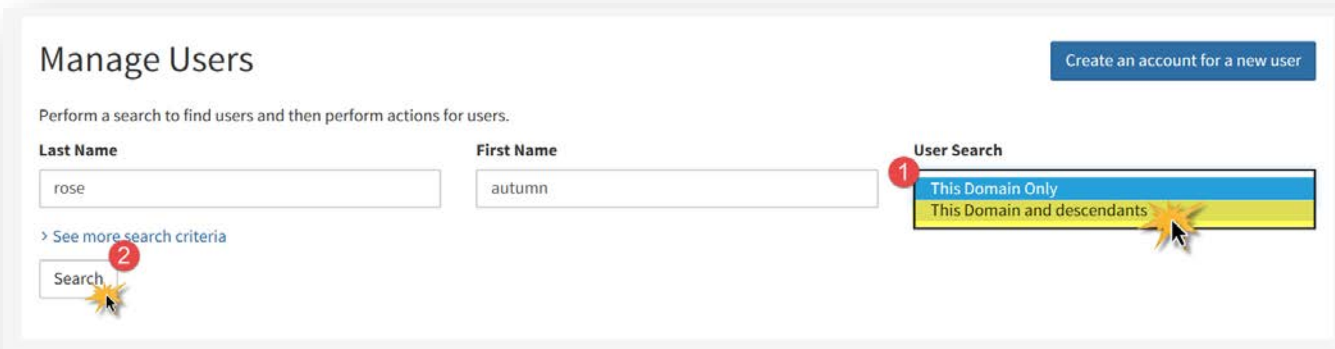
You must have the **Administrator Role** to perform the following tasks. To obtain an Administrator Role for your agency you must request permission from your established agency iLearn Administrator. If you agency does not have a designated iLearn Administrator contact the System Administrator at iLearnOregon@oregon.gov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

Responsibilities

From your homepage go to Responsibilities → People



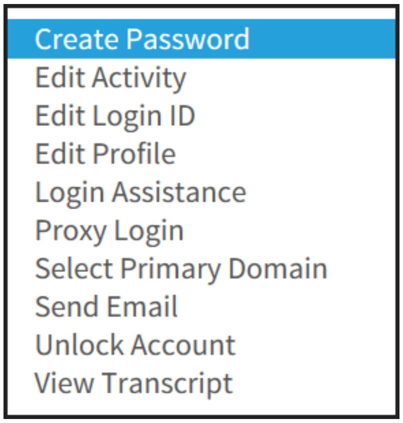
Search for the account you want to manage. If the individual does not have an account, see the "*Create an account for a new user*" section.



Manage User Accounts

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

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

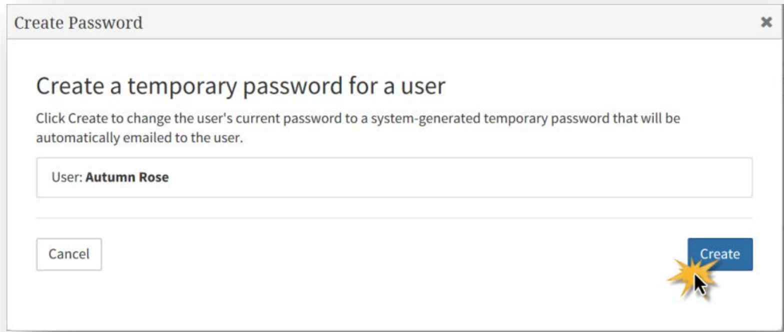


4. Information:

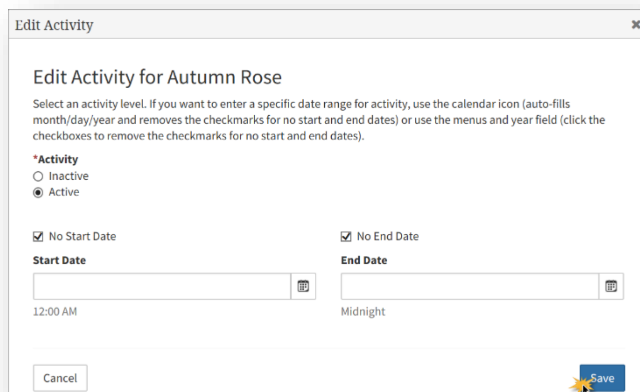
Action Menu

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

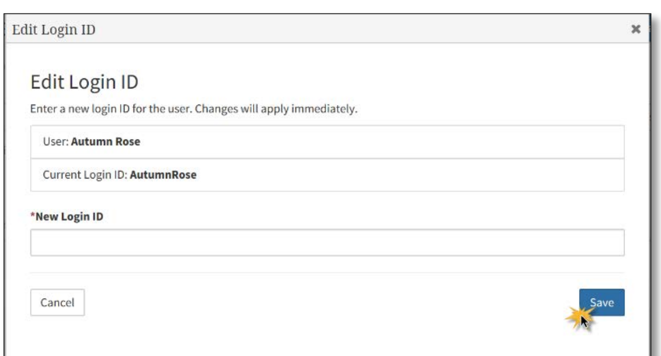
- **Create Password** – When you *click* **Create** a temporary password will be generated and sent via email to the user. If they do not have a valid email on file this option will not work you will need to *select* **Login Assistance**.



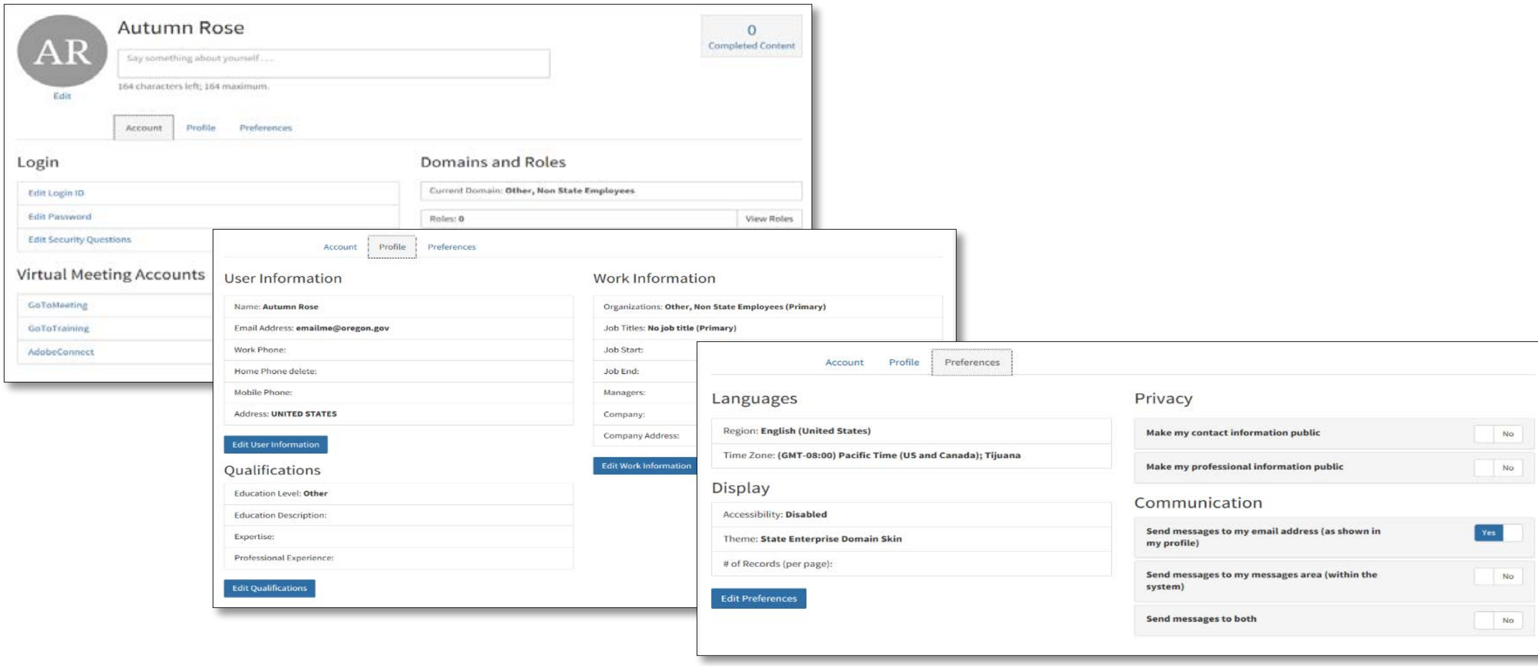
- **Edit Activity** – Use this action to *Activate* and *Inactivate* accounts. Only use the Radio Buttons, do not set Start and End Dates, *click* **Save**.



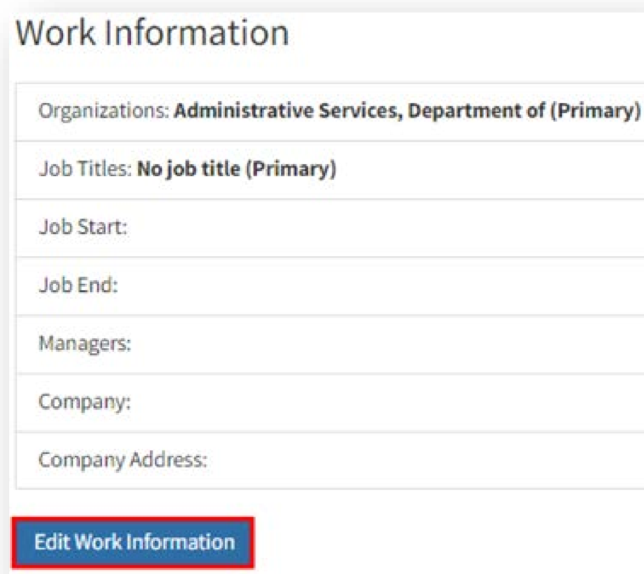
- **Edit Login ID** – Change the Login ID for an account, *click* **Save**.



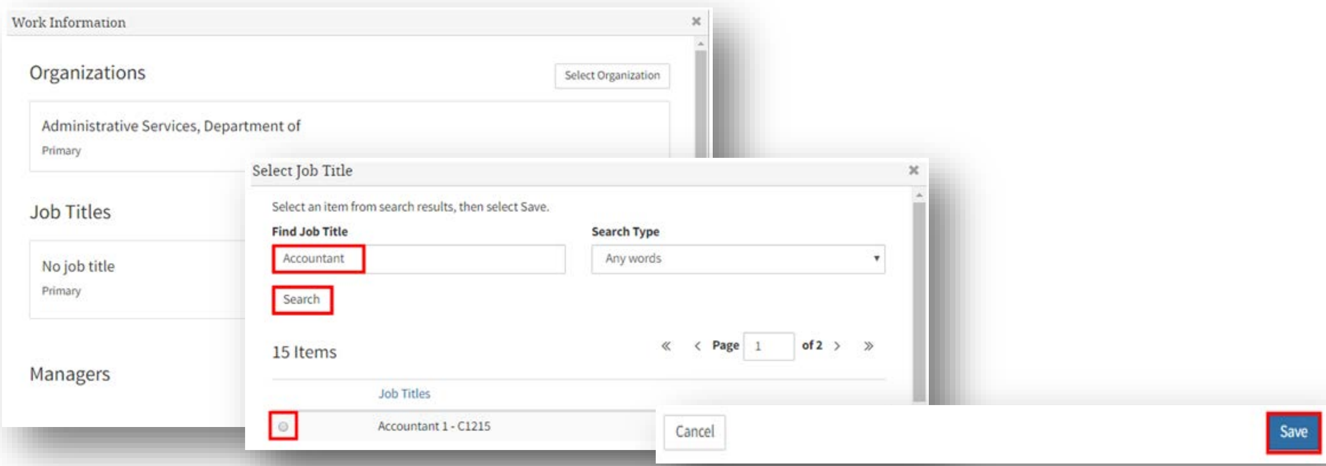
Edit Profile – This action allows you to edit several items in a user profile. In this version of iLearn when you are editing a User Profile it is the same as when an end user edits their profile.



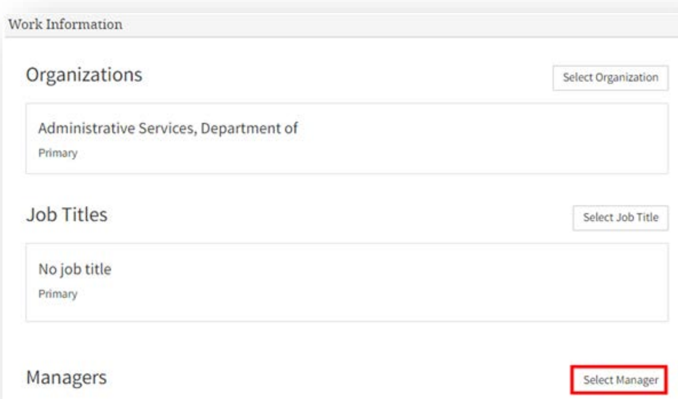
1. Edit Work Information **–** To update the Job Title, Manager, and Organization you will *click* **Edit Work Information** in the "Work Information" section of this page.

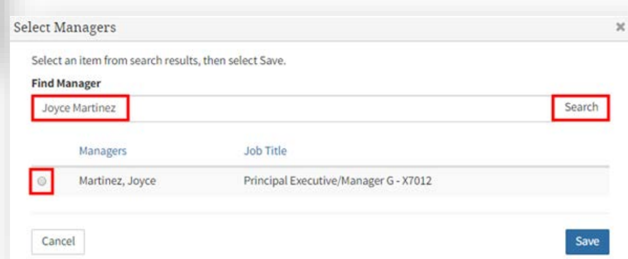


- **Job Title** – *click* **Select Job Title**, search for the desired position/classification, *select* the radio button for the classification you desire, and *click* **Save.**

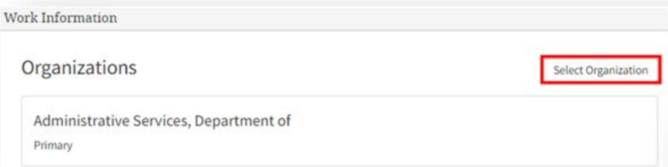


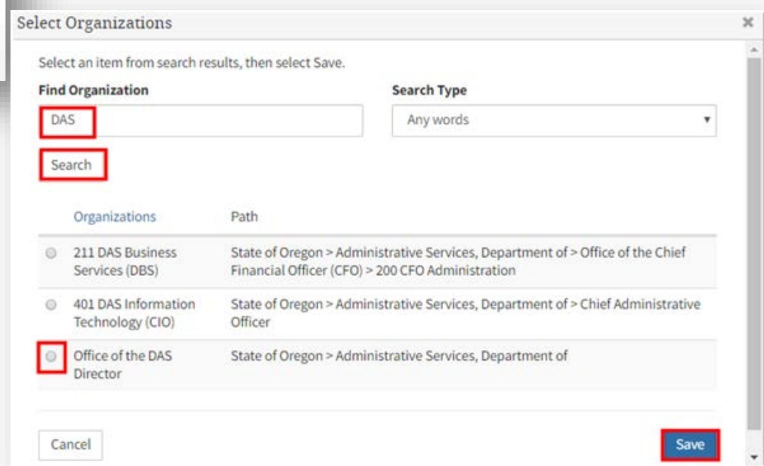
- **Manager** – To update the Manager, click on the “Select Manager” button, search for the desired Manager, select the radio button for the desired Manager, and *click* **Save.**



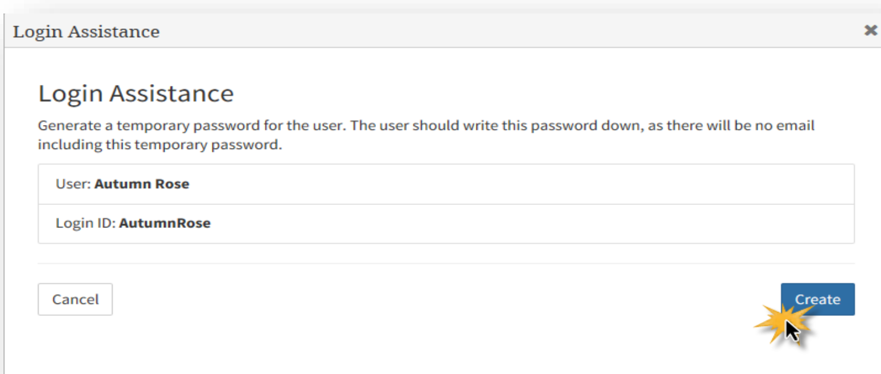


- **Organization** – To update the Organization, *click* **Select Organization**, *search* for the desired Organization, *select* the radio button for the desired Organization, and click **Save.**

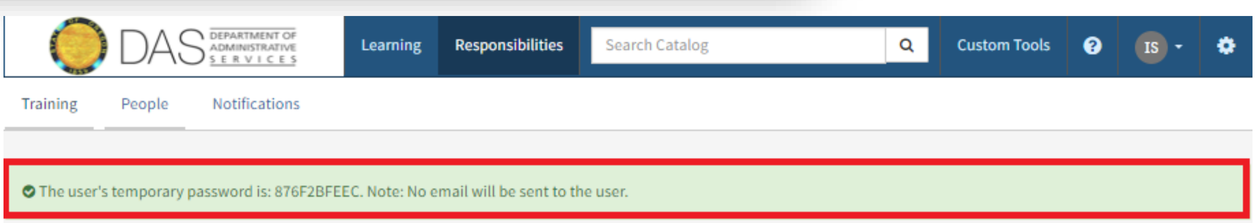




- **Login Assistance** – Use this to reset a password for an account without a valid email address, *click* **Create**.

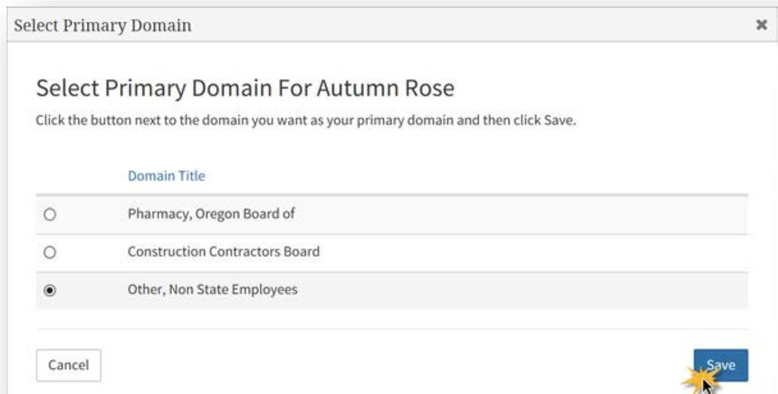


When the window closes, look at the top of the screen for the temporary password that can be given over the phone on sent in an email by you.

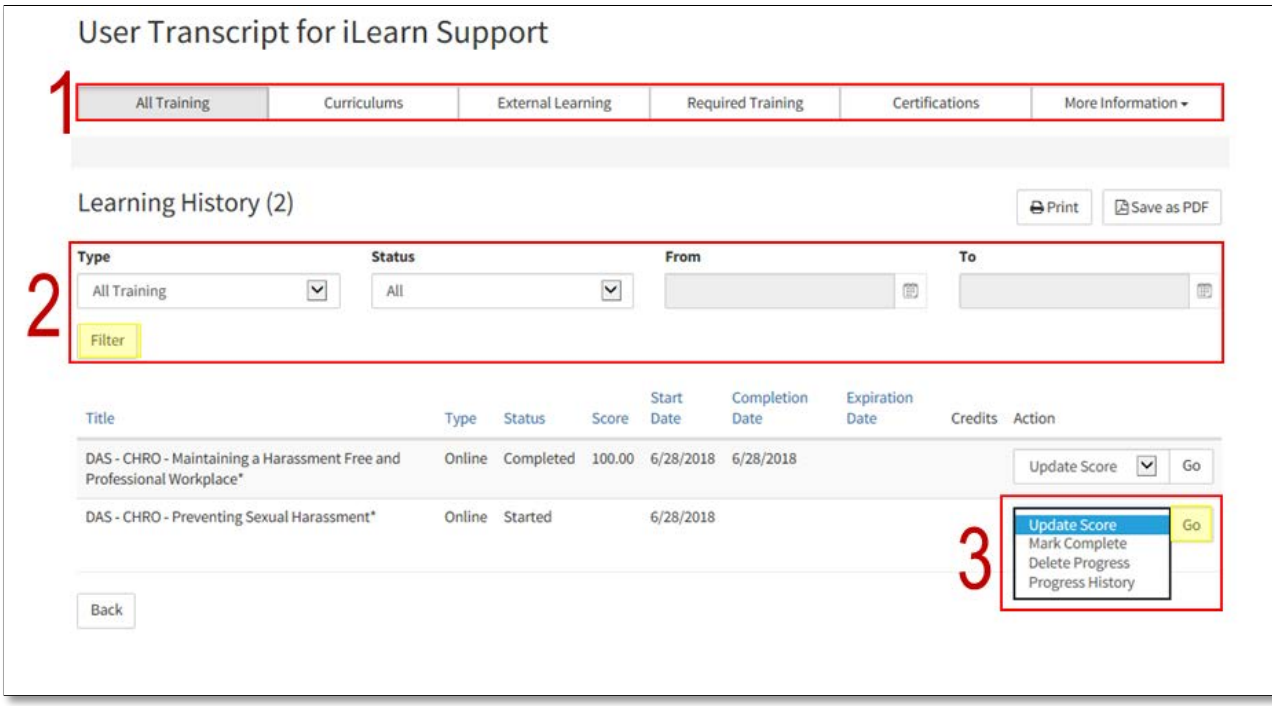


Select Primary Domain – When an account has dual domain memberships it may be necessary to select the primary domain if the wrong one is selected or there isn't a primary domain identified. The indication of no account assigned is there will be a Meridian Global banner at the top of the screen and they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

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



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



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 Prerequisetes, Required Training Exemptions, Expired Incomplete Content, or View PDF Files and Notes)

2. Filter the transcript by Training Type, Status, and Date. *Click* **Filter.**

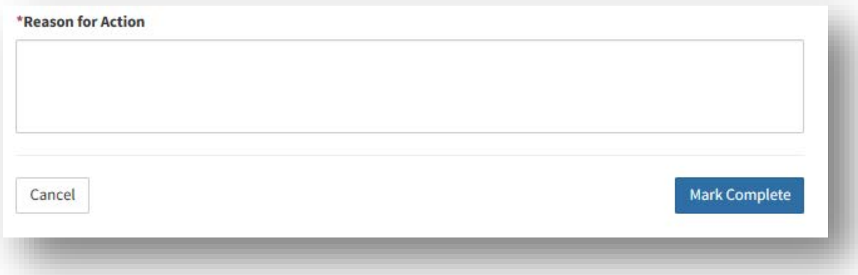
3. In the Action menu you can select what action you would like to complete for the training.

Transcript Action Menu

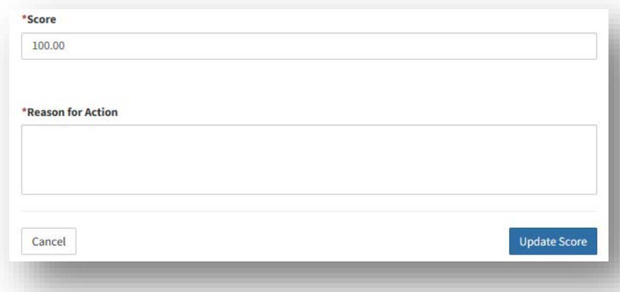
Select the action you want to do then *click* Go

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:

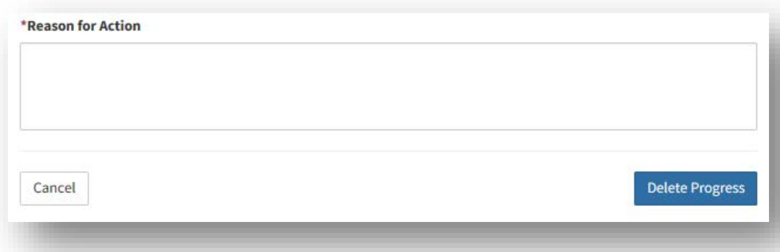
1. Mark Complete – Input the reason for marking complete and *click* Mark Complete.



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.

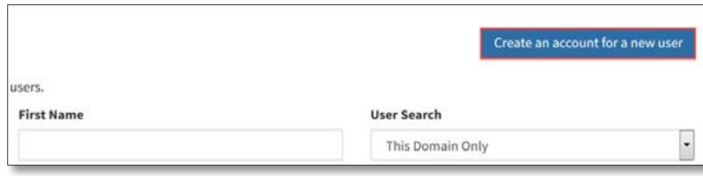


3. Progress History – Here you can view all of the completions and/or changes that have been made to the training record.

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

Create an account for a new user

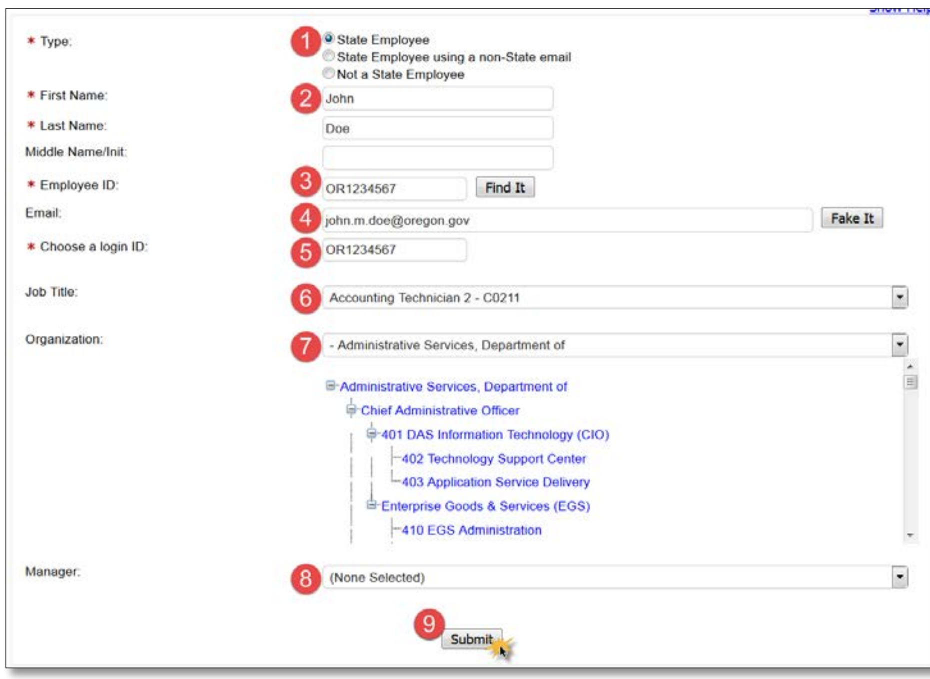
Click Create an account for a new user.



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.

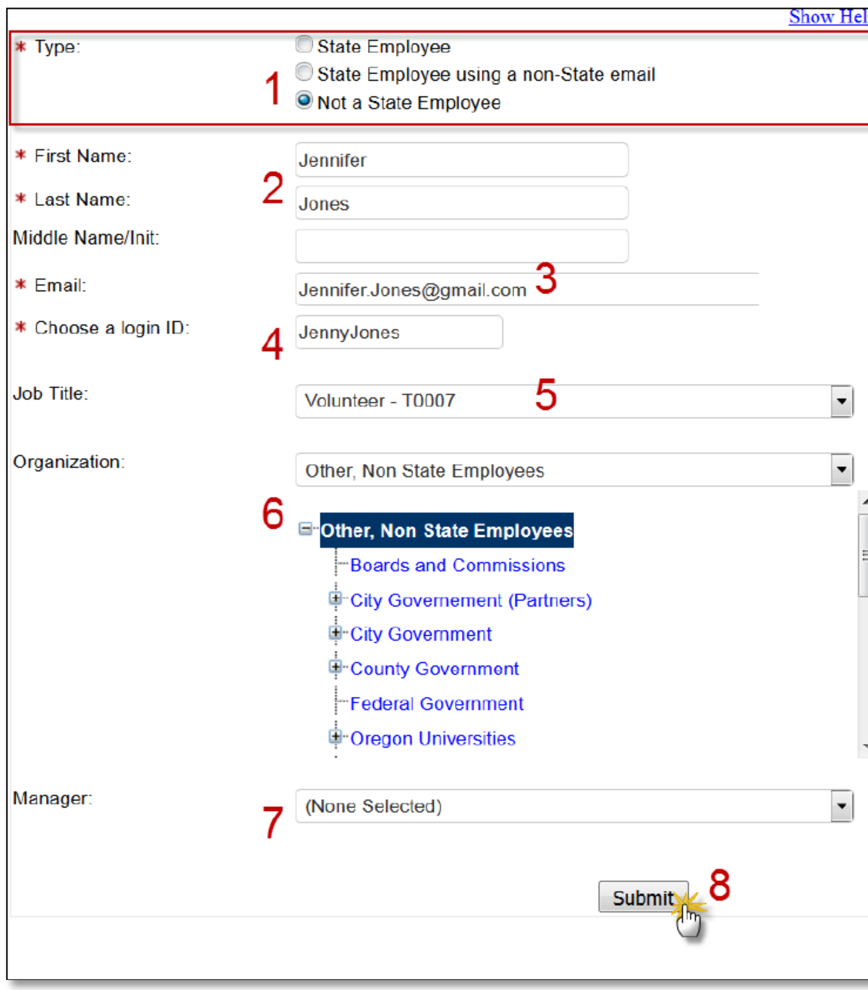


1. *Select* State Employee.
2. *Enter* name.
3. *Enter* Employee ID (OR#) and *click* **Find it**, this can populate the email field.
4. Enter the employees email address here if it doesn't populate from the OR#.
   a. An email address can only be used one time and must match the PPDB record.
5. *Choose*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

Non-State Emloyee Account

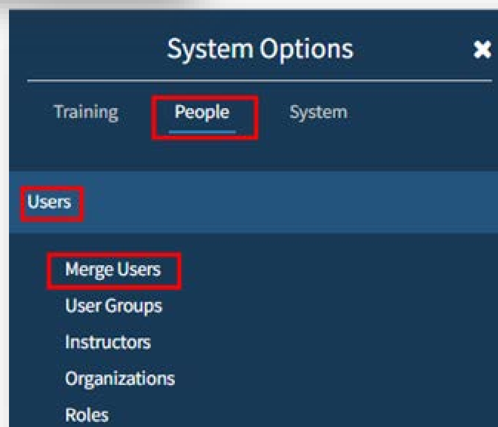
All items with * are required information.

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**.

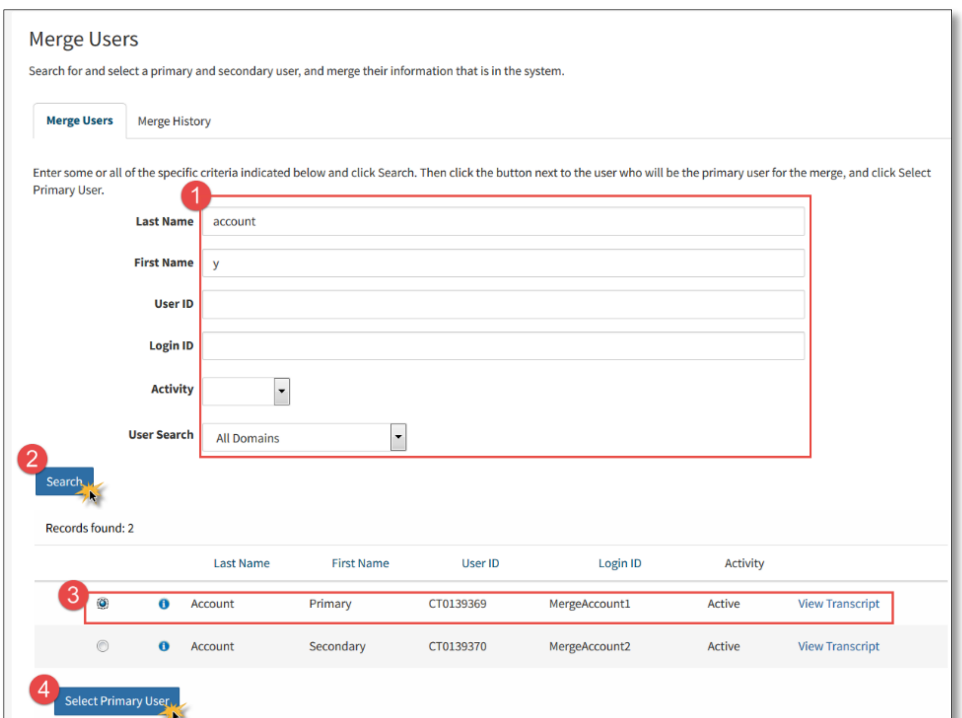


Merge User Accounts

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**.

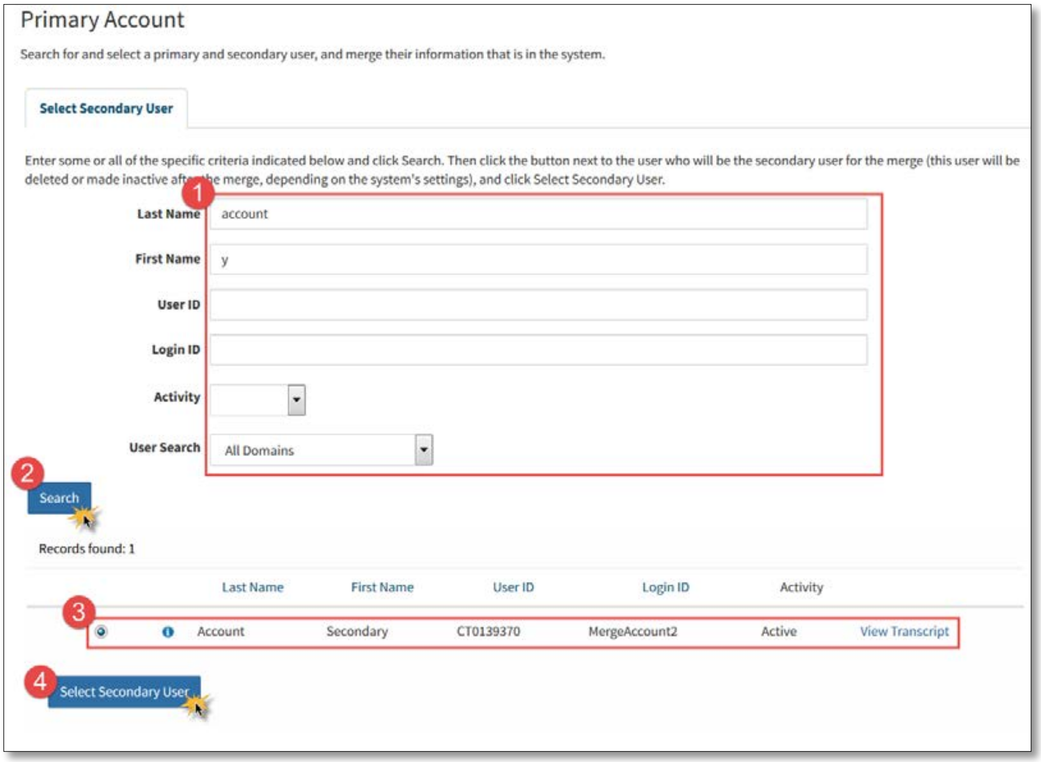


Search for the account you would like to be the primary account. This account will be the one that remains active.



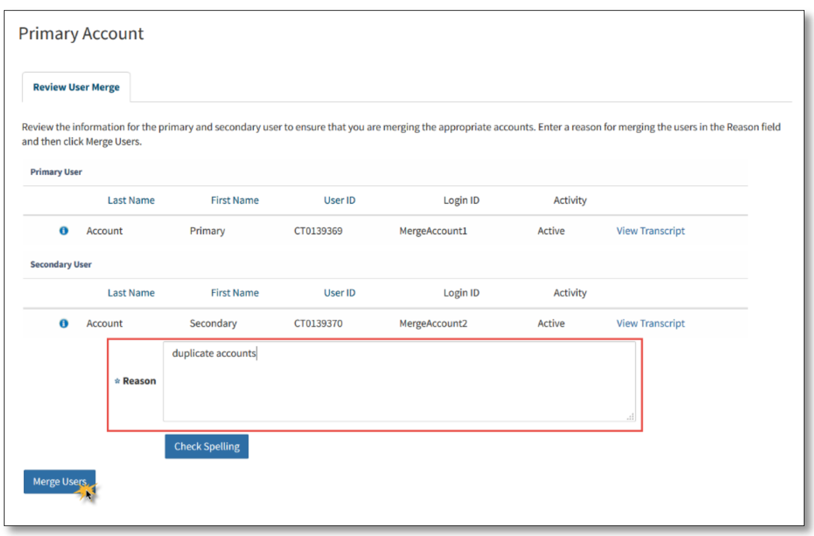
If you are attempting to merge accounts from different domains you will need to *Search* "All Domains".

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



Repeat steps 1 – 4 to select the Secondary Account

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



Enter the **reason** for the merge.

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

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