User Management

Purpose:

Learn how to search for, add, and edit users.

Administrative Roles with Access:

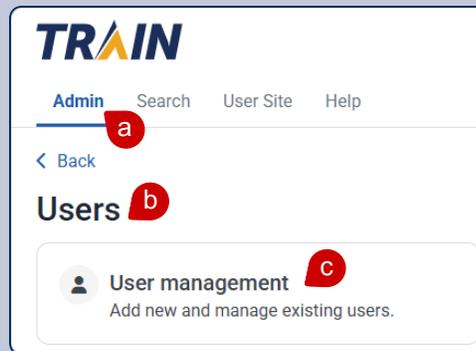- **User Account Manager**

Table of Contents:

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From the Public Health Foundation

1 — Navigate to User Management

Go to the **(a) Admin** menu. Click the **(b) Users** tile and select **(c) User Management**.

2 — Add a User

On the User Management page, click the **Add User** button. Then, fill in the required fields.

TIP: Required fields are marked with a red bar or asterisk.

(Fields marked below are required)

(a) Click through each section of the menu to fill out the learner's details. To save the user account, all required fields must be completed.

(b) Click the green **Save** button to complete the user account.

3 — Search for a User

On the User Management page, search for a learner by **(a) filtering** the results or typing into the **(b) search** bar.

Search for a User (continued)

3
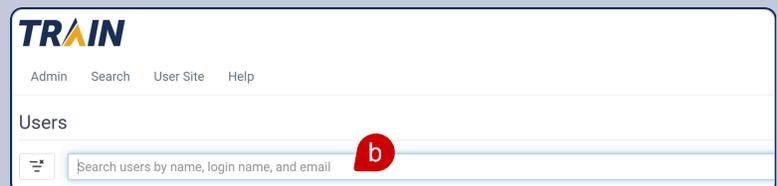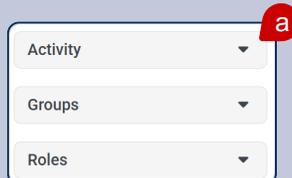
TIP: If you know the login name, user name, or email of the user, use quotations around your search criteria to locate an exact match. When searching by the user's name, follow the "Last name, First name" pattern to avoid additional results returning.

1.

DEFINITION

- **Locked** - accounts not logged in for 90 days or more
- **Inactive** - accounts that have been deactivated
- **Expired** - accounts set to "expired"

Users

"Smith, Carter"

Groups

Selected Groups

Add More Groups

Georgia

National/ Georgia
National/Georgia/ Georgia EMS
National/ International/ Georgia
National/Georgia/ General Public
National/Georgia/ State/District/County Public Health
National/Michigan/Course Sharing/ EMS Courses - Georgia
National/Medical Reserve Corps (MRC)/Region 04 (IV)/ Georgia
National/Medical Reserve Corps (MRC)/Region 04 (IV)/Georgia/ MAG MRC
National/Medical Reserve Corps (MRC)/Region 04 (IV)/Georgia/ MRC GEM
National/Georgia/State/District/County Public Health/ DPH State Office

« ‹ 1 2 3 4 5 6 7 8 9 10 › »

Cancel   Apply

Activity

☐ Include inactive
☐ Include expired
☑ Include locked

Groups

Select Groups

Roles

Select All

Filter items

☐ Account Proxy Login
☐ Assessment Manager

⏵⏵ Use the **(c) Activity** filter to include or remove inactive, expired, or locked results. "Locked" is included by default.

⏵⏵ Use the **(d) Groups** filter to select sub-groups, if available. Use the green **(e) + button** to select the group to filter by. Use the **(f) toggle** to change how you search.

⏵⏵ Use the **(g) Roles** filter to narrow the results by administrative roles.

⏵⏵ Use the **(h) sort** feature to view the list of results in your preferred way. The default sort will show *Recently modified.* When searching, the sort will automatically update to *Relevance*.
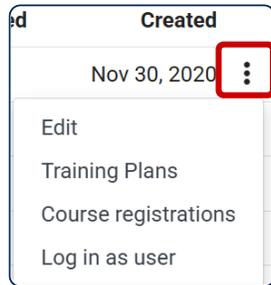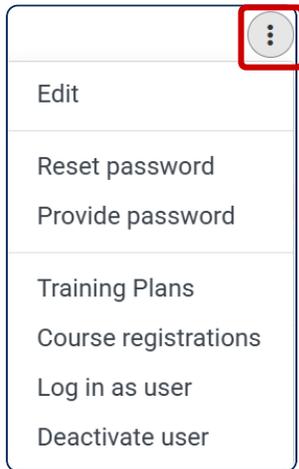
Recently modified

Relevance
A-Z
Z-A
Login name
Email
Newest
Recently modified

Edit a User

4

To edit the User's details, click on the **(a) user's name** on the User Management page, and the **(b) Edit** button within the box that requires modification. Remember to click the green **Save** button.

‹ Back

CS **Carter Smith**
Last login: Jul 15, 2021 • Total logins: 3

User account has not been active in more than 90 days. User must set a new password in order to access the account.

Account information   Edit

User ID

Login name

Quick Navig
Account info
Admin note
Contact info
Custom attributes
Course provider information

Edit
Reset password
Provide password
Training Plans
Course registrations
Log in as user
Deactivate user

Name

Smith, Carter

Created
Nov 30, 2020

Edit

Save

To access an alternate view with limited capabilities:

⏵⏵ Click on the **(a) user's name**, **(c) the three-dot menu** in the top right, and then select **(d) Edit**.

⏵⏵ Click the **(e) three-dot** menu on the User Management page and **(f) Edit** button.

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Edit a User (continued)

4

Edit

Reset password

Provide password

Training Plans

Course registrations

Log in as user

Deactivate user

Created

Nov 30, 2020

Edit

Training Plans

Course registrations

Log in as user

Access **Edit**, **Training plans**, **Course registrations**, and **Log in as user** (if permitted) through the three-dot menu on the User Management page or on the User details page.

To **Reset password**, **Provide password**, or **Deactivate user**, click on the user's name and then the three-dot menu.

For more training resources, view the TRAIN tutorial page.

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