

Job Aid: Add and Edit User Records

Purpose

The purpose of the Add and Edit User Records job aid is to guide you through the step-by-step process of editing a user record and viewing a user record.

In this Job Aid, you will learn how to:

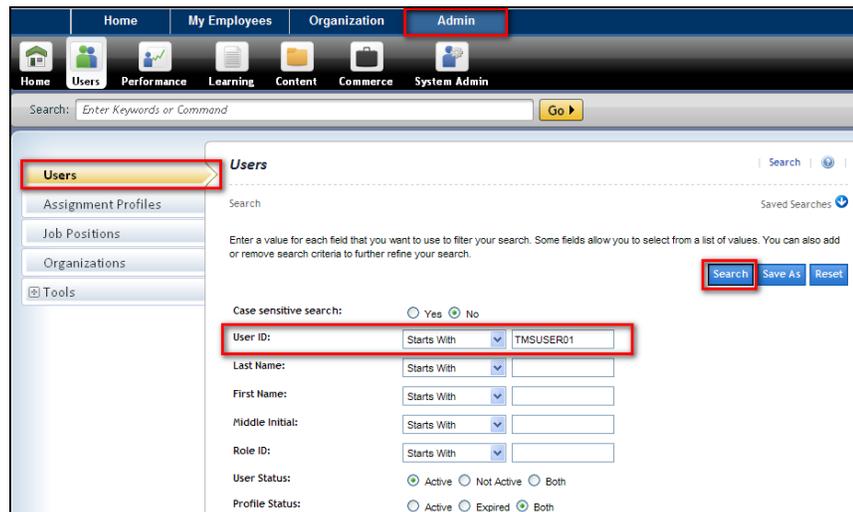
- Edit User Record
- View User Record



Task A. Edit User Record

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Users**.
2. Complete the **User ID** field or other search criteria to find the record you wish to edit.
3. Click the **Search** link.

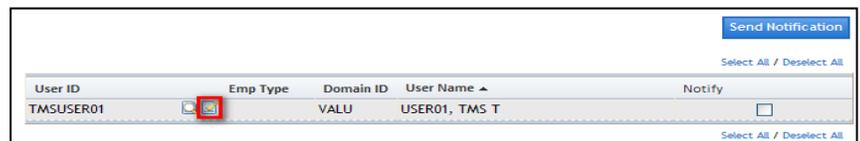


The screenshot shows the TMS Admin interface. The 'Admin' tab is selected in the top navigation bar. The 'Users' menu is expanded, and the 'Users' sub-menu is selected. The search criteria form is displayed with the following fields:

- Case sensitive search: Yes No
- User ID: Starts With (highlighted with a red box)
- Last Name: Starts With
- First Name: Starts With
- Middle Initial: Starts With
- Role ID: Starts With
- User Status: Active Not Active Both
- Profile Status: Active Expired Both

The 'Search' button is highlighted with a red box.

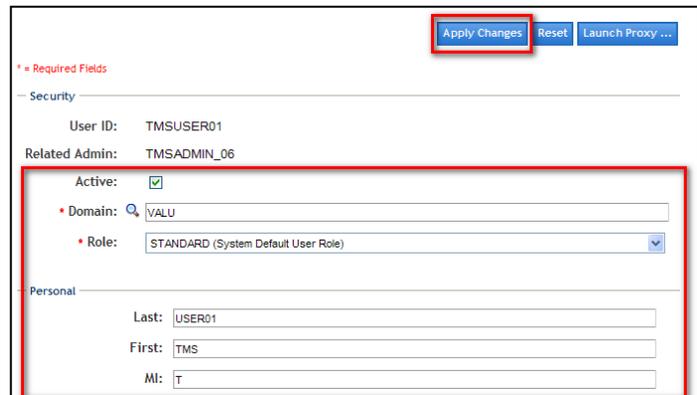
4. Once the user is displayed, click the **Edit** icon.



User ID	Emp Type	Domain ID	User Name	Notify
TMSUSER01		VALU	USER01, TMS T	<input type="checkbox"/>

The 'Edit' icon (a small square with a pencil) is highlighted with a red box in the row for TMSUSER01.

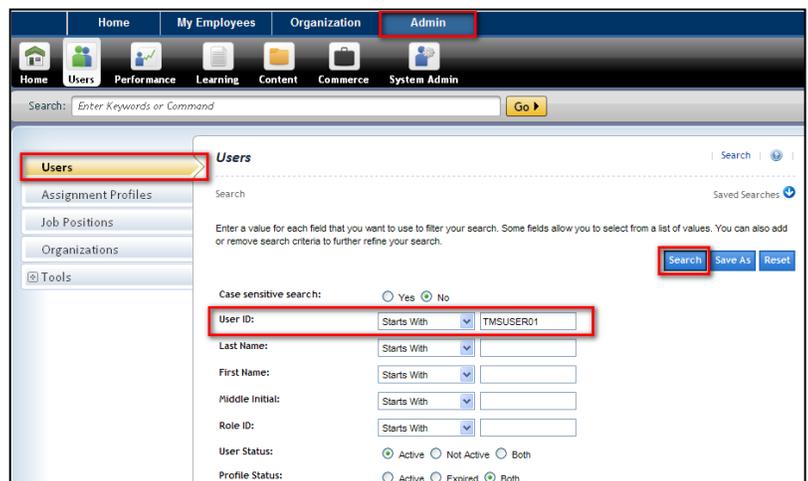
5. Edit the user information as appropriate.
6. Click **Apply Changes** to save changes.



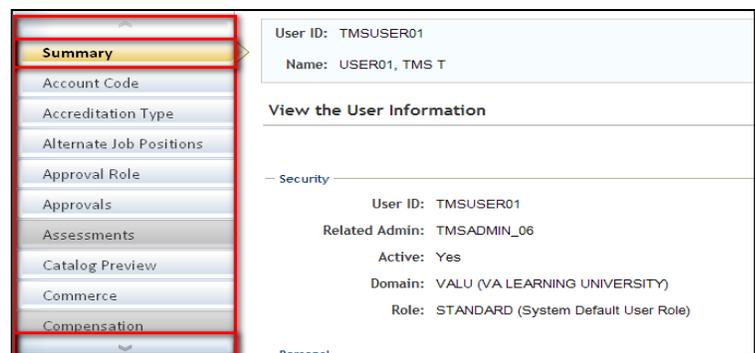

Task B. View User Record

Note: Verify that the **Admin** tab is selected.

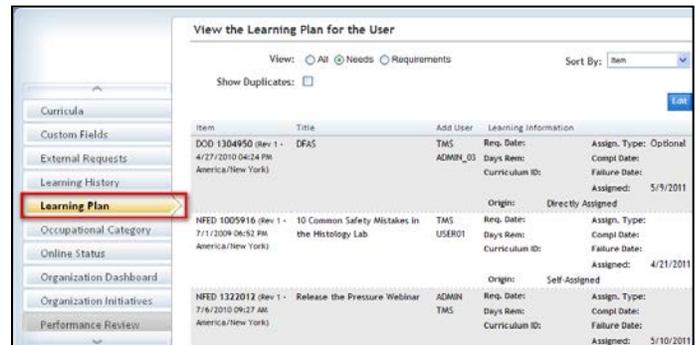
1. Navigate to **Users > Users**.
2. Complete the **User ID** field or other search criteria to find the record you wish to edit.
3. Click **Search**.
4. Once the user is displayed, click the **View** icon. The **Summary** tab displays.



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

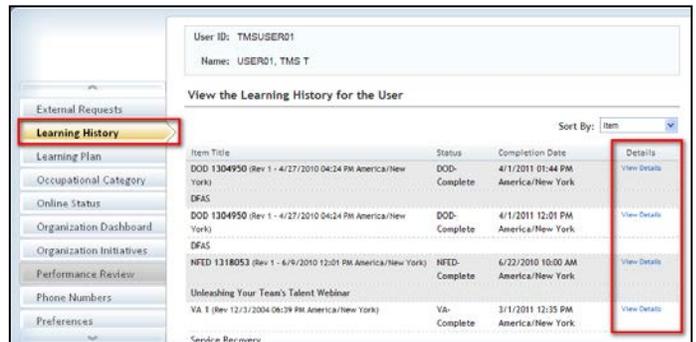


6. Select the **Learning Plan** tab to view currently assigned items.



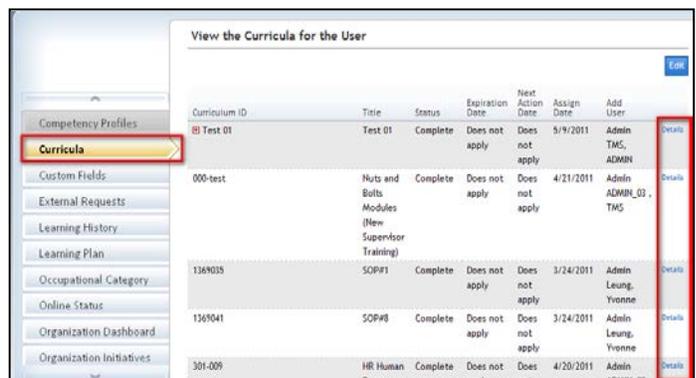
Item	Title	Add User	Learning Information
DOD 1304950 (Rev 1 - 4/27/2010 04:24 PM America/New York)	DFAS	TMS ADMIN_03	Req. Dates: 5/9/2011 Days Rem: Curriculum ID: Assign. Type: Optional Comp. Date: Failure Date: Assigned:
NFED 1005916 (Rev 1 - 7/11/2009 04:52 PM America/New York)	10 Common Safety Mistakes in the Histology Lab	TMS USER01	Req. Dates: Days Rem: Curriculum ID: Assign. Type: Comp. Date: Failure Date: Assigned: 5/9/2011
NFED 1322012 (Rev 1 - 7/6/2010 09:27 AM America/New York)	Release the Pressure Webinar	ADMIN TMS	Req. Dates: Days Rem: Curriculum ID: Assign. Type: Comp. Date: Failure Date: Assigned: 5/10/2011

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



Item Title	Status	Completion Date	Details
DOD 1304950 (Rev 1 - 4/27/2010 04:24 PM America/New York)	Complete	4/11/2011 07:44 PM America/New York	View Details
DOD 1304950 (Rev 1 - 4/27/2010 04:24 PM America/New York)	Complete	4/11/2011 12:01 PM America/New York	View Details
NFED 1318053 (Rev 1 - 6/9/2010 12:01 PM America/New York)	Complete	6/22/2010 10:00 AM America/New York	View Details
Unleashing Your Team's Talent Webinar	Complete	3/11/2011 12:35 PM America/New York	View Details

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



Curriculum ID	Title	Status	Expiration Date	Next Action Date	Assign Date	Add User	Details
Test 01	Test 01	Complete	Does not apply	Does not apply	5/9/2011	Admin TMS, ADMIN	Details
000-test	Nuts and Bolts Modules (New Supervisor Training)	Complete	Does not apply	Does not apply	4/21/2011	Admin ADMIN_03, TMS	Details
1369035	SOP#1	Complete	Does not apply	Does not apply	3/24/2011	Admin Leung, Yvonne	Details
1369041	SOP#8	Complete	Does not apply	Does not apply	3/24/2011	Admin Leung, Yvonne	Details
301-009	HR Human Resources	Complete	Does not apply	Does not apply	4/20/2011	Admin	Details