

Job Aid: Add, Edit and View User Records

Description

The purpose of this job aid is to guide administrators through the step-by-step process of adding a new user record, editing a user record, and viewing a user record.

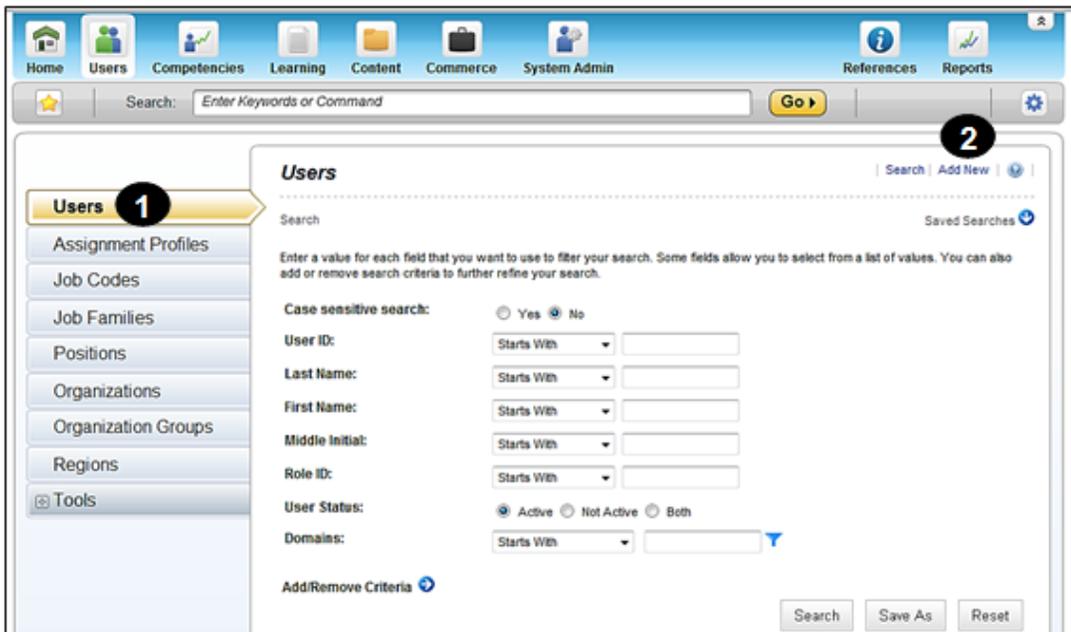
Tasks

- A. Add New User Record
- B. View and Edit User Record

Task A. Add New User Record

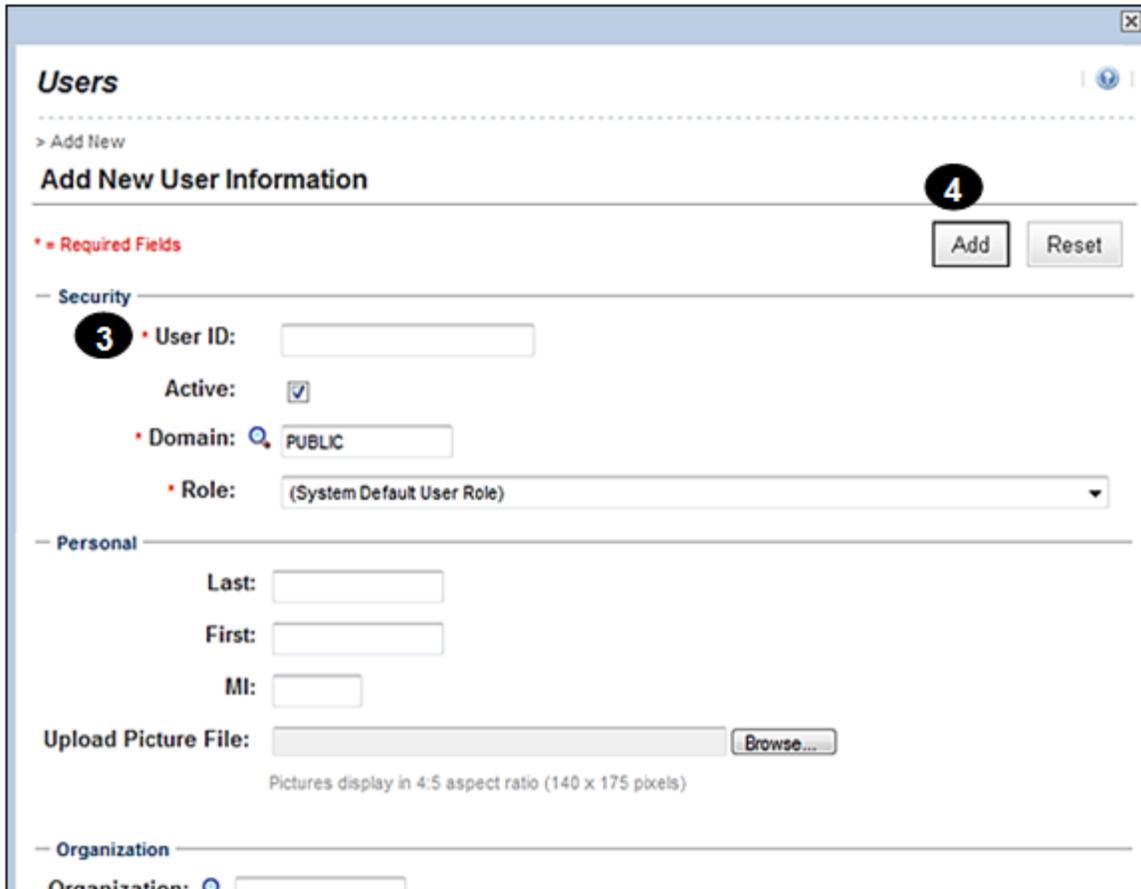
Note: Verify you are in Learning Admin.

1. Navigate to Users> Users.
2. Click the **Add New** link.



The screenshot displays the TMS web application interface. The top navigation bar includes links for Home, Users, Competencies, Learning, Content, Commerce, System Admin, References, and Reports. A search bar is located below the navigation bar. The left sidebar contains a menu with 'Users' selected, indicated by a yellow highlight and a circled '1'. The main content area is titled 'Users' and features a search section with the following fields: Case sensitive search (radio buttons for Yes and No), User ID, Last Name, First Name, Middle Initial, Role ID, User Status (radio buttons for Active, Not Active, and Both), and Domains. A circled '2' highlights the 'Add New' link in the top right corner of the main content area. At the bottom of the search section, there are 'Search', 'Save As', and 'Reset' buttons.

3. Enter a new user ID, domain, and role (mandatory fields). Additional information can be added as determined by established best practices.
4. Once the user information is entered, click **Add**. A new User record is added.



Users

> Add New

Add New User Information

* Required Fields

4

Add **Reset**

— Security

3 * User ID:

Active:

* Domain:

* Role: (System Default User Role)

— Personal

Last:

First:

MI:

Upload Picture File: **Browse...**

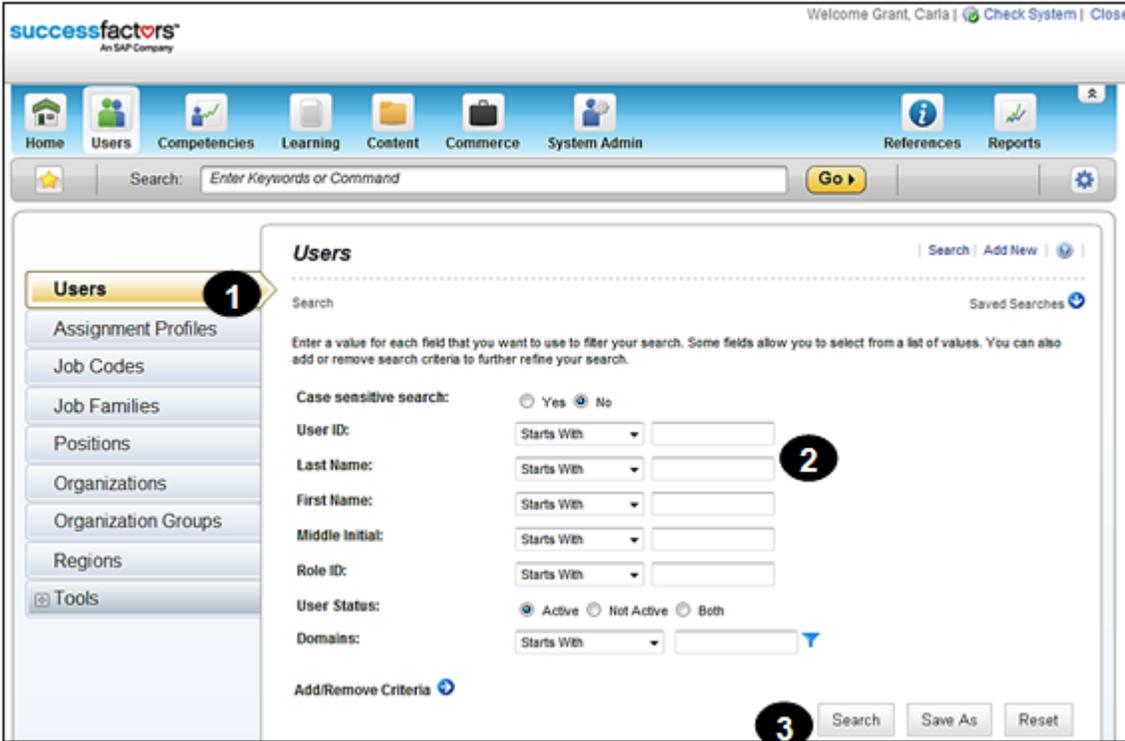
Pictures display in 4:5 aspect ratio (140 x 175 pixels)

— Organization

Organization:

Task B. View and Edit User Record

1. Navigate to Users > Users.
2. Enter a user ID, or other search criteria to find the record you wish to edit.
3. Click Search.



The screenshot displays the SuccessFactors 'Users' search interface. On the left, a navigation menu has 'Users' selected, indicated by a circled '1'. The main content area is titled 'Users' and includes a search bar and a 'Go' button. Below the search bar, there are several search criteria fields: 'Case sensitive search' (radio buttons for Yes and No), 'User ID' (Starts With dropdown and text input), 'Last Name' (Starts With dropdown and text input, circled '2'), 'First Name' (Starts With dropdown and text input), 'Middle Initial' (Starts With dropdown and text input), 'Role ID' (Starts With dropdown and text input), 'User Status' (radio buttons for Active, Not Active, and Both), and 'Domains' (Starts With dropdown and text input). At the bottom, there are 'Add/Remove Criteria', 'Search', 'Save As', and 'Reset' buttons, with the 'Search' button circled '3'.

Locate the record in the search results.

4. Click the user ID to open and view the record.

Note: To bookmark this record, click the star icon (★).

Field Chooser [Download Search Results](#) [Send Notification](#)
[Select All / Deselect All](#)

Records per Page 25 (13 total records)

	User ID	User Name	Job Location	Active	Notify
☆	DIANMSWANSON	Swanson, Diana M		Yes	<input type="checkbox"/>
☆	DRUCSWANSON	Swanson, Dru C		Yes	<input type="checkbox"/>
☆	MEMSWANSON	Swanson, Megan M	SF	Yes	<input type="checkbox"/>
★	RSWANSON	Swanson, Ronald U	IN	Yes	<input type="checkbox"/>
☆	KATHMSWANN	Swann, Kathryn M		Yes	<input type="checkbox"/>
☆	KRISMSWANN	Swann, Kristen M		Yes	<input type="checkbox"/>
☆	LAURLSWANN	Swann, Laura L		Yes	<input type="checkbox"/>

The record layout contains three main areas:

- Core (red outline) - primary user information. Click **View All** to display all fields.
- Related (yellow outline) - list of user record tabs. Select **More** to view additional user record tabs.
- Actions (green outline) - common actions that can be performed on record. Click **View All** to view entire list.

Ronald U Swanson rswanson [Actions](#) [View All](#)

5 **Picture:**  [Edit](#)

First Name:	Ronald
Last Name:	Swanson
Job Code:	
Organization:	Industry (IND)
*Domain:	Default Public Access D
Primary Supervisor:	Hoff, Marcus Q (mhoff1)
*Role:	(System Default Learn
Job Location:	IN (Indiana)
Emp Type:	CIV (Civilian)

[View All](#)

7 **Actions** [View All](#)

- Bookmark
- Registration Assi...
- Assign Learning ...
- Send Notification
- Launch Proxy
- View User's Tale...
- Manage Alternat...
- Reset User Pin

6 **Related** [More](#) **Learning Plan** [View](#) Needs Sort By Item

Learning Plan	Item Title	Assigned By	Learning Information	Remove
Learning History	Fire Extinguisher	Carla Grant	Requi... MM/DD/YYYY Assig... Required	<input type="checkbox"/>
Curricula			Days ... Comp...	
Competency Profiles			Curric... Failur...	
Competencies			Origin: Directly Assign... Assig... 4/27/2012	
External Requests	Fire Extinguisher Worksh...	Carla Grant	Requi... MM/DD/YYYY Assig... Required	<input type="checkbox"/>
Assignment Profiles				

8. Click directly into a field to make edits.
9. Click **View All** to make edits to additional fields.

Note: Refer to online help for additional information on navigating the user record.

Ronald U Swanson rswanson

Picture: 	Edit	First Name: Ronald
		Last Name: Swanson
		Job Code:
*Domain: Default Public Access D		Organization: Industry (IND)
Primary Supervisor: Hoff, Marcus Q (mhoff1) 	8	*Role: (System Default Learn
Job Location: IN (Indiana)		Emp Type: CIV (Civilian)

[View All](#) **9**

10. Additional settings can be edited by clicking directly into the field.
11. Click **Save** to save any changes.

Additional Settings ✕

*Required Fields

Extended Summary

MI: U	Email Address:
Active: Yes	Related Admin:
Native DeepLink User: No	Passport Country:
For Federal User Connect...	For Federal User Connect...
For Federal User Connect...	

Employment

Position:	Emp Status: FT (Full Time)
Hired: 10/31/2008	Job Title: Director, Parks Department
Prior Years of Service: 0	Prior Months of Service: 0
Region:	Related Instructor:
Is Full-Time: Yes	Regular/Temp:

Reset Password

New Password: **10** **Verify Password:**

11 [Save](#) [Cancel](#)