



# Job Aid - External Contractor Administrator User Records Management

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Version 1.0

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# Introduction

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This Job Aid will walk you through manually adding users in the CMS, locating the user, and editing their records, including resetting passwords.

General Contractor Administrators will have further access in the CMS within the Competence section to view and verify the status of employees' PTS credentials, including access to printing training completion certificates.

## CMS Account Administration

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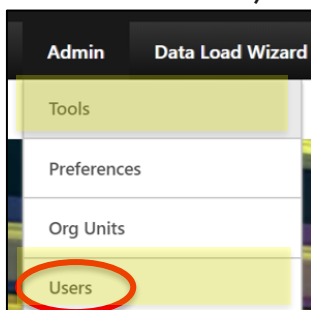
You will be introduced to the Add New User page, which enables Administrators to create a new user in the system and set the details of their record. Administrators are only able to view and set fields based on their permissions. If an Administrator does not have permission to view or edit a field on the user record, then the field is not visible to the Administrator.

**Mandatory fields are marked with an asterisk \* and require information to save the new user record.**

## Add User Records

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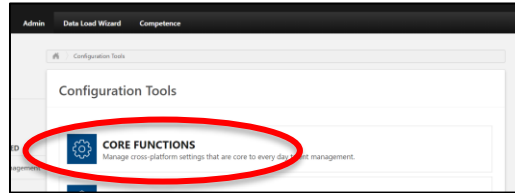
1. New users can be added through the following methods (depending on your access level):



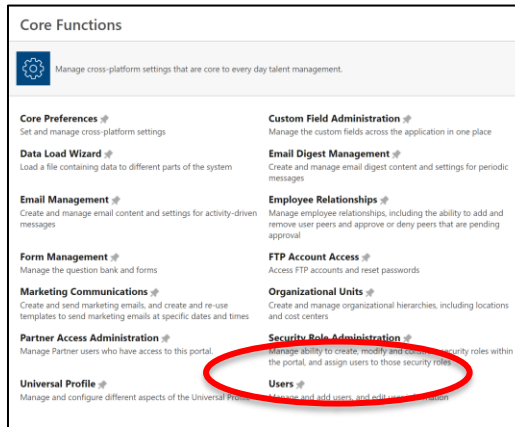
- Hover over the Admin tab within the Welcome page and select the Users option from the dropdown list or the Tools option.

# Steps from the Tools Option (Users option takes you directly into the Users page)

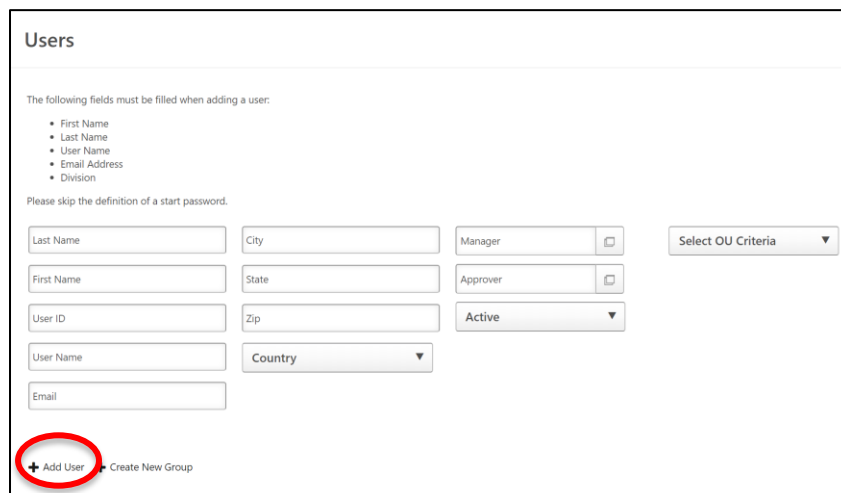
1. The Configuration Tools page appears. Click on the Core Functions option.

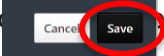


2. The Core Functions page appears. Click on the Users option.



3. The User page appears. Click on the Add User link.



4. The Add New User page appears. Work through each section entering the user's information. The fields marked with an asterisk \* are mandatory and require information to save the new user record.
- Photo: Add a photo of the new user, or ensure the new user updates their account profile with their photo once created.
  - User ID: Do not modify the automatically generated user ID number that appears in the field. This number is based on a unique system sequential generation.
  - Local System ID: Do not enter information in this field.
  - Allow Reconciliation: Leave this checkbox unselected.
  - Absent: Mark this checkbox if the user is absent (e.g., long-term leave).
  - Active Status: Defaults to "Active" but can be changed to "Inactive" with a specified date of the inactive period. This ensures that the users' assigned learnings are on hold and do not appear for scheduled audits.
  - Email Address: The users' email addresses must be unique. You cannot use a universal/shared company email for multiple users. The system does not support this.
  - Required Training Approvals: This field defaults to 0. Do not modify. The PTS training courses are automatically assigned to every user and appear in their CMS accounts.
  - Division: Locate your division by either using the search filters or clicking on the expand button for your division to view all options.
  - User type: Select the user and employment status type using the dropdown list (e.g., Contractor) and their employment status.
5. Validate that the information you entered for the user is accurate, then click on the Save button located at the bottom 

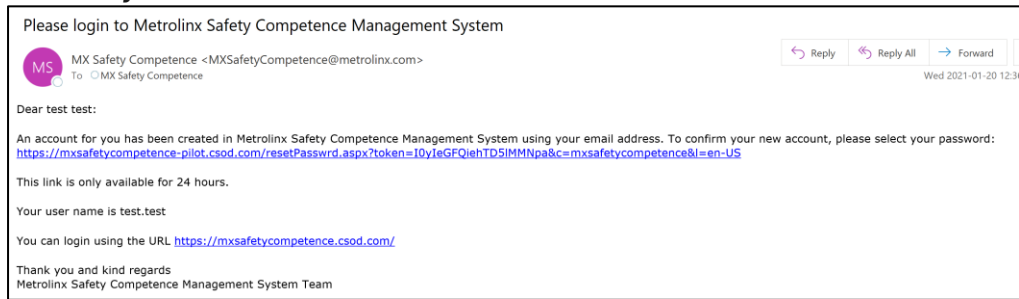
You have successfully created the new user, and they are notified via Email that their new user account has been created.

## New User Account Created - Email Notification

Once you set up a new user, they will be notified to the email address listed that an account has been created for them in the CMS.

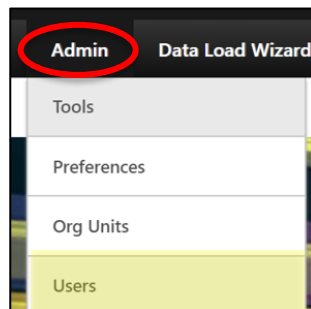
They will have to confirm their new account following the link provided and create a password.

This link may appear in the users' Junk mail, so please inform them once you have created their account to locate the Email to complete their process. The link will only be available for 24 hrs.

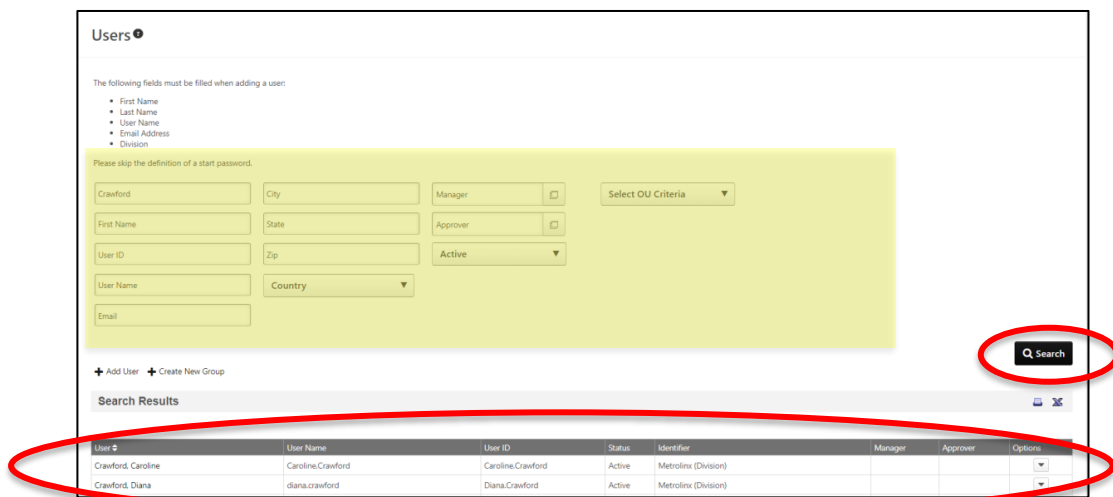


## Locate a User Record

1. From within the Welcome page, hover over the Admin tab and select the Users option from the dropdown list.



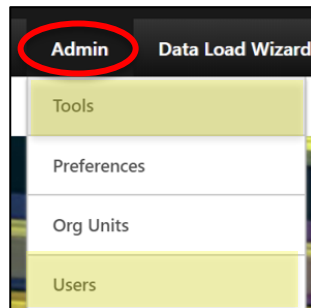
2. Enter information into the search filters on the Users page and click on the Search button to retrieve results. Search results appear at the bottom of the page.



# Edit a User Record

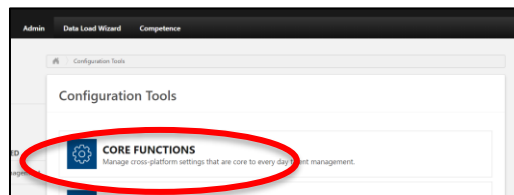
As an Administrator, you may need to update and modify your division/company user records (e.g., absent, inactive, etc.).

2. Users records can be edited through the following methods (depending on your access level):
  - Hover over the Admin tab within the Welcome page and select the Users option from the dropdown list or the Tools option.

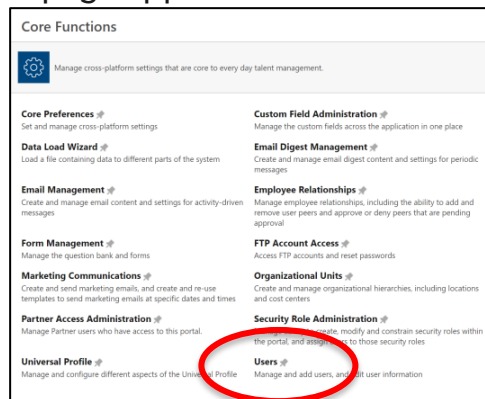


Steps from the Tools Option (Users option takes you directly into the Users page)

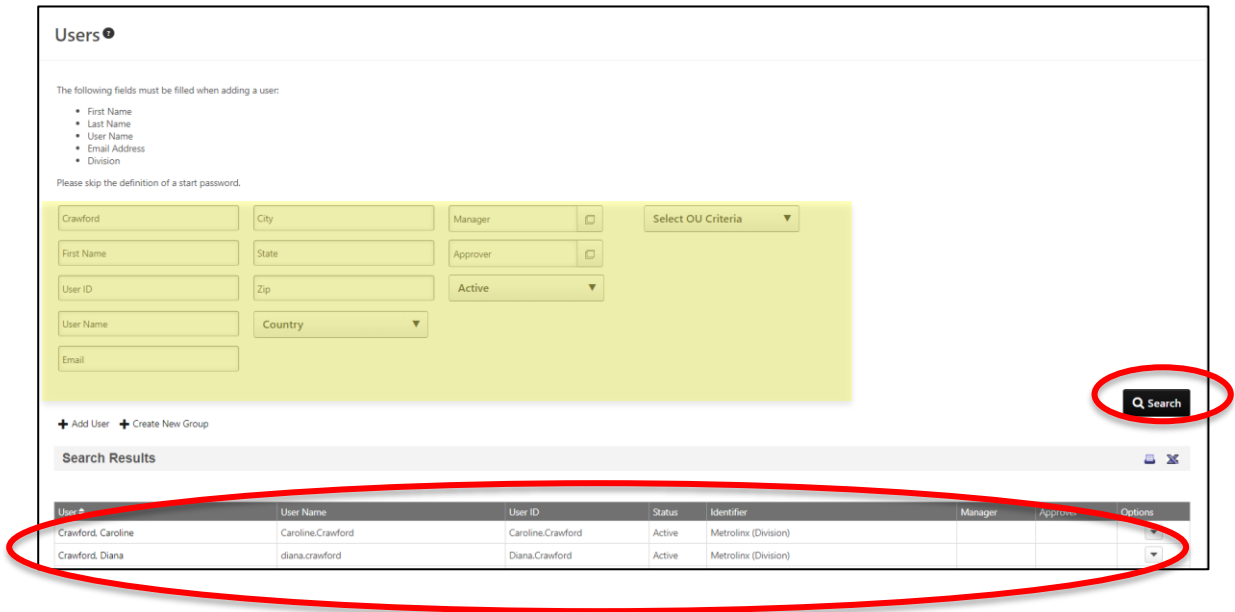
1. The Configuration Tools page appears. Click on the Core Functions option.



2. The Core Functions page appears. Click on the Users option.



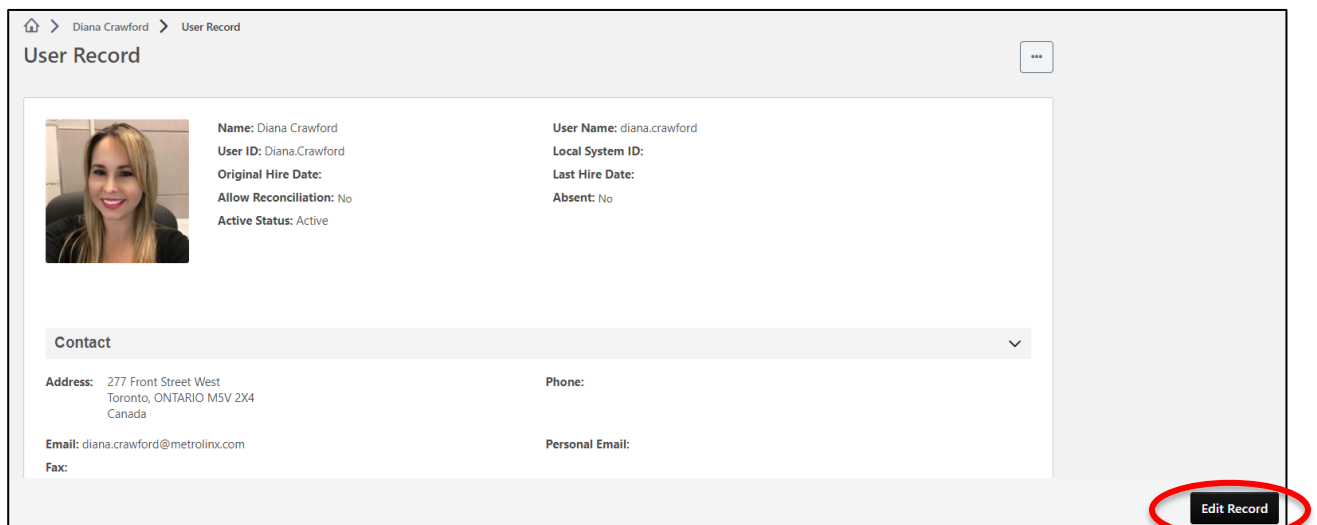
- Enter information into the search filters on the Users page and click on the Search button to retrieve results. Search results appear at the bottom of the page.



- Click on the user's name to open their record.

User #	User Name	User ID	Status	Identifier	Manager	Approver	Options
Crawford, Caroline	Caroline.Crawford	Caroline.Crawford	Active	Metrolinx (Division)			
Crawford, Diana	diana.crawford	Diana.Crawford	Active	Metrolinx (Division)			

- The User Record page appears. Click on the Edit button at the bottom of the page to place the record in edit mode.





6. You can now modify fields in the user's record. Once changes are complete, click on the Save button to save changes and update the user record.

## Accessing Temporary PTS Training Completion Certificate

Once your team member successfully passes the final competency test for the PTS course, they are provided a training completion certificate.

**Warning: If the account holder did not update their account profile information and photo, their temporary PTS certificate will be incomplete and have blank sections.**

All your users' training records and certificates can be viewed in their transcripts.

1. Hover over the Admin tab in the top navigation bar from the Welcome page.
2. Click on the Users option from the dropdown list.
3. Enter the user's First name, Last name, and/or Email in the search fields using the ALL filter and click on the Search button.
4. The username appears in the Search Results section at the bottom of the screen. Click on the username you are seeking to print the certificate.

The screenshot shows the 'Users' management page. At the top, there are instructions on required fields (First Name, Last Name, User Name, Email Address, Division) and a 'Please skip the definition of a start password.' message. Below this is a form with various input fields: 'test' (City), 'Manager' (dropdown), 'Select OU Criteria' (dropdown), 'First Name', 'State', 'Approver' (dropdown), 'User ID', 'Zip', 'All' (dropdown), 'User Name', 'Country' (dropdown), and 'Email'. There are '+ Add User' and '+ Create New Group' buttons. A 'Search' button is in the top right. Below the form is a 'Search Results' section with a table. The first row of the table is circled in red.

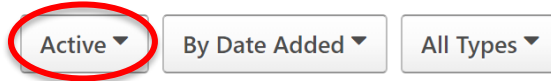
User	User Name	User ID	Status	Identifier	Manager	Approver	Options
test_auditor	Auditor.Test	012287	InActive	Contractors (Division)			

5. Click on the Transcript option in the top navigation



bar.

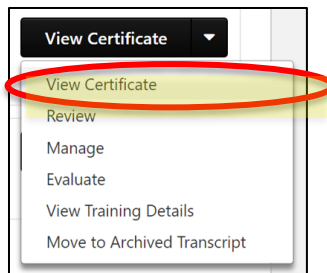
6. The PTS Competency Test record has now been moved to the Completed folder. Search the completed folder by clicking on the Status tab and changing the status to Completed.



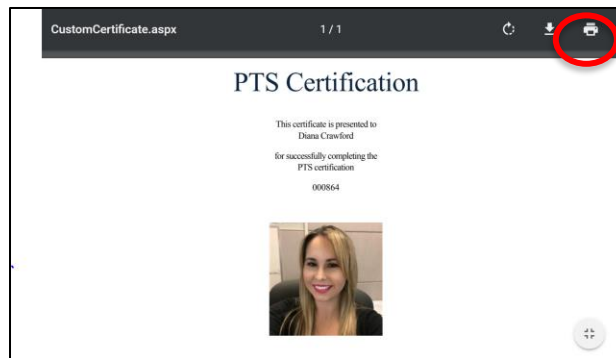
7. All completed learning objects appear (e.g., PTS Competency Test). Locate the PTS Competency Test record and access it by clicking the View Certificate button.



8. Click on the dropdown arrow and select the View Certificate option from the list.



9. The user's PTS Certification appears. You can save and print a copy of this certificate from this screen by clicking on the down arrow icon. It will always be accessible in their completed transcript for further reference.



10. The user's PTS Certification displays the name, the course name, ID number, and photo. The ID number is a unique value that will always be associated with their CMS account profile. This number does not change even when the training is renewed or if the individual changes employers.