



Job Aid – External Contractor Administrators Add, Locate, and Edit User Records

Date: January 2020
Version 1.0

Table of Contents

Introduction.....	3
Add User Records.....	3
Steps from the Tools Option (Users option takes you directly into the Users page)	4
New User Account Created - Email Notification	5
Locate a User Record	6
Edit a User Record.....	7
Steps from the Tools Option (Users option takes you directly into the Users page)	7
General Contractor Administrator – Competence Management.....	9

Introduction

This Job Aid will walk you through the process for manually adding users in the CMS, locating the user, and editing their records. General Contractor Administrators will have further access in the CMS within the Competence section to view and verify the status of workers PTS credentials.

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 in order to save the new user record.

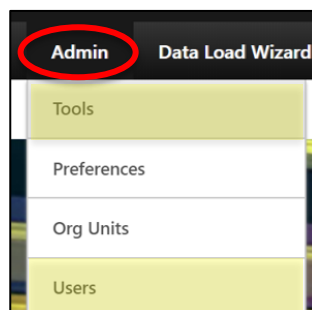
Once you set up a new user, they will be notified via email notification to the email address listed that an account has been created for them in the CMS. The email address must be unique to the individual, universal/shared company emails are not supported.

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 complete their process. The link will only be available for 24 hrs.

Add User Records

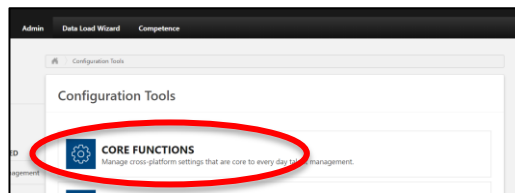
When creating a new user record, if you do not specify pertinent information, such as their photo and contact information, ensure you notify the user to update these fields. They are critical and mandatory for the PTS course.

1. New users can be added through the following methods (depending on your access level):
 - From within the **Welcome** page, hover over the **Admin** tab and select either the **Users** option from the dropdown list or the **Tools** option.

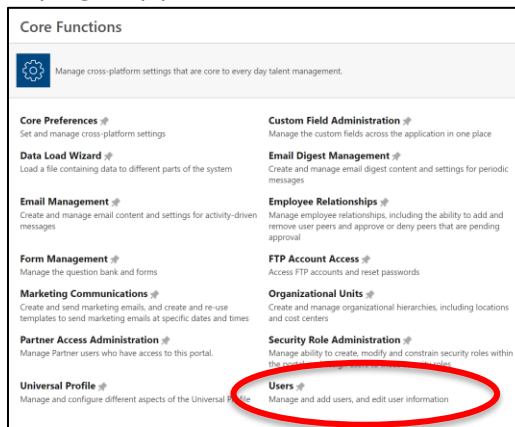


Steps from the Tools Option (Users option takes you directly into the Users page)

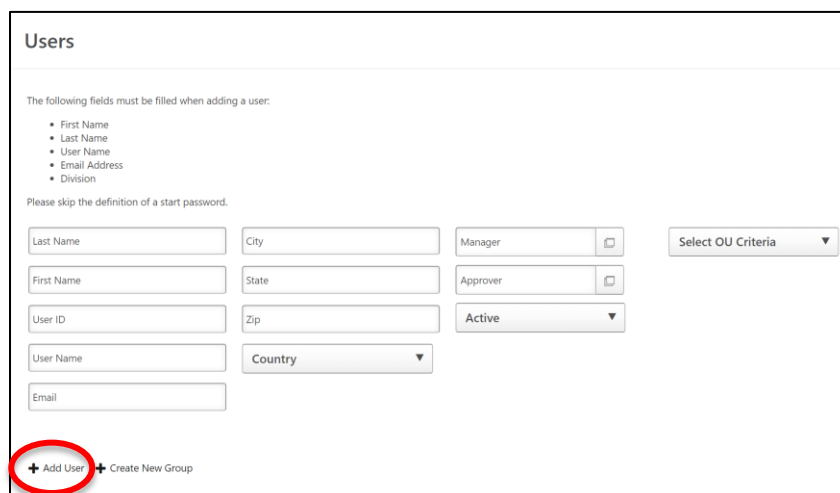
1. The **Configuration Tools** page appears. Click on the **Core Functions** option.

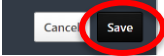


2. The **Core Functions** page appears. Click on the **Users** option.



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

A screenshot of the 'Users' page. The page title is 'Users'. Below the title, there is a list of required fields: First Name, Last Name, User Name, Email Address, and Division. Below this, there is a section for 'Please skip the definition of a start password.' with several input fields: Last Name, City, Manager, First Name, State, Approver, User ID, Zip, Active, User Name, Country, and Email. At the bottom left, there is a link '+ Add User' circled in red, followed by '+ Create New Group'. On the right side, there is a dropdown menu 'Select OU Criteria'.

4. The **Add New User** page appears. Work through each section entering the user's information. The fields marked with an asterisk * are mandatory fields and require information in order 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 automatic 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 is to ensure the users assigned learnings are on hold and they do not appear for scheduled audits.
 - **Email Address:** The users email address must be unique to the user. You cannot use a universal/shared company email for multiple users. This is not supported by the system.
 - **Required Training Approvals:** This field defaults to 0. Do not modify. The PTS training courses is automatically assigned to every user and will 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 type of user and employment status 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 of the page. 

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

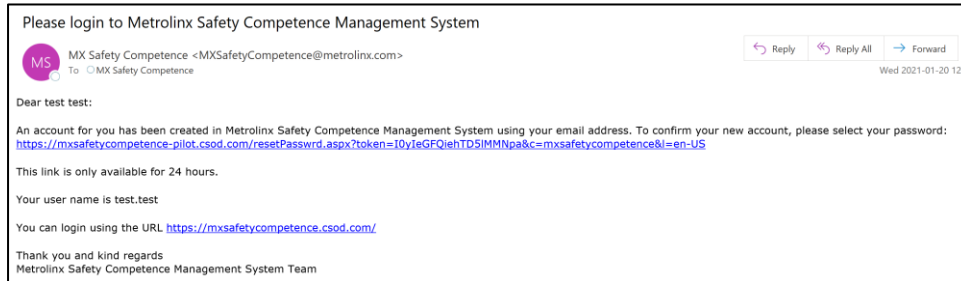
New User Account Created – Email Notification

Once you set up a new user, they will be notified via email notification 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.

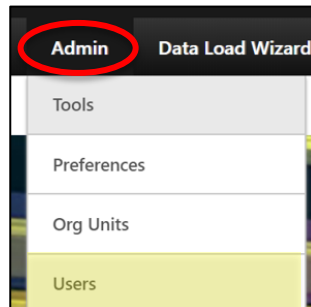
This link may appear in the users Junk mail, so please inform them once you have created their account to locate the email in order to complete their process.

The link will only be available for 24 hrs.



Locate a User Record

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



- In the **Users** page, enter information into the **search filters** and click on the **Search** button to retrieve results. Search results appear in the bottom of the page.

Users

The following fields must be filled when adding a user:

- First Name
- Last Name
- User Name
- Email Address
- Division

Please skip the definition of a start password.

Form fields: Crawford, City, Manager, Select OU Criteria, First Name, State, Approver, User ID, Zip, Active, User Name, Country, Email.

+ Add User + Create New Group

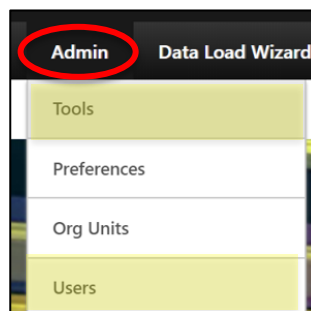
Search Results

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

Edit a User Record

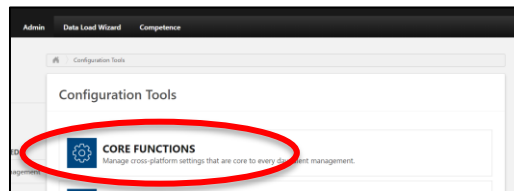
As an Administrator, you may need to update and modify your division/company user records (e.g. absent, inactive, etc.).

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

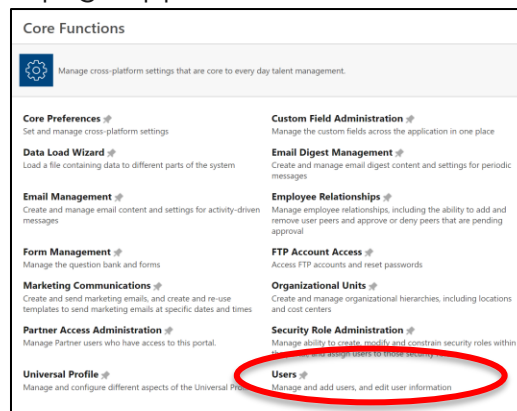


Steps from the Tools Option (Users option takes you directly into the Users page)

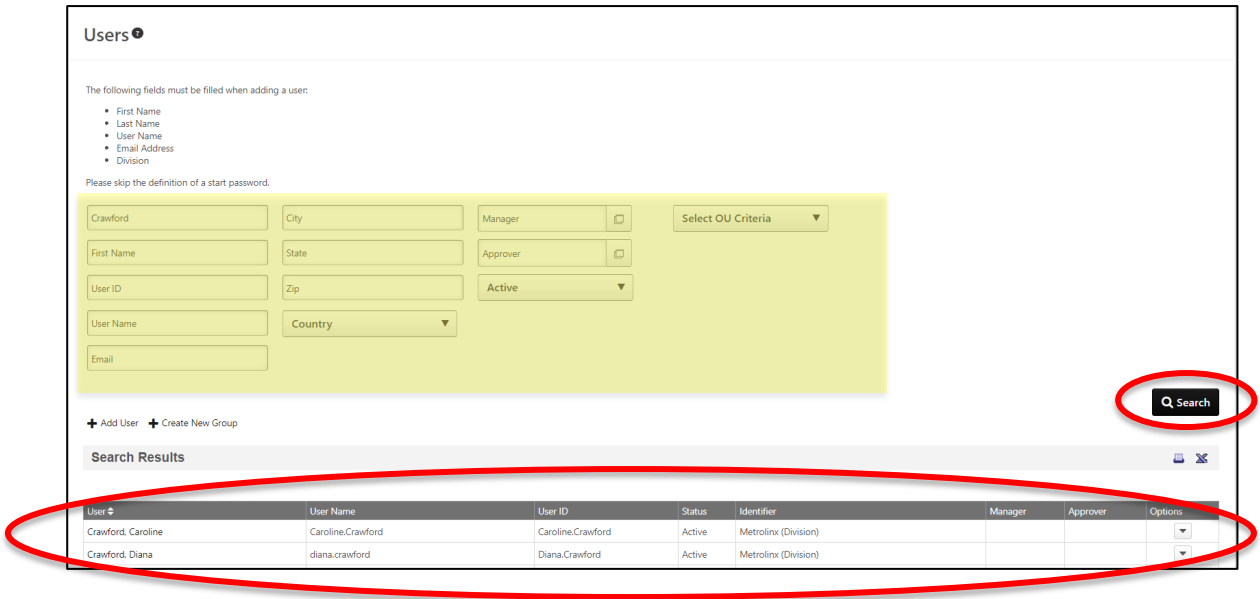
2. The **Configuration Tools** page appears. Click on the **Core Functions** option.



3. The **Core Functions** page appears. Click on the **Users** option.



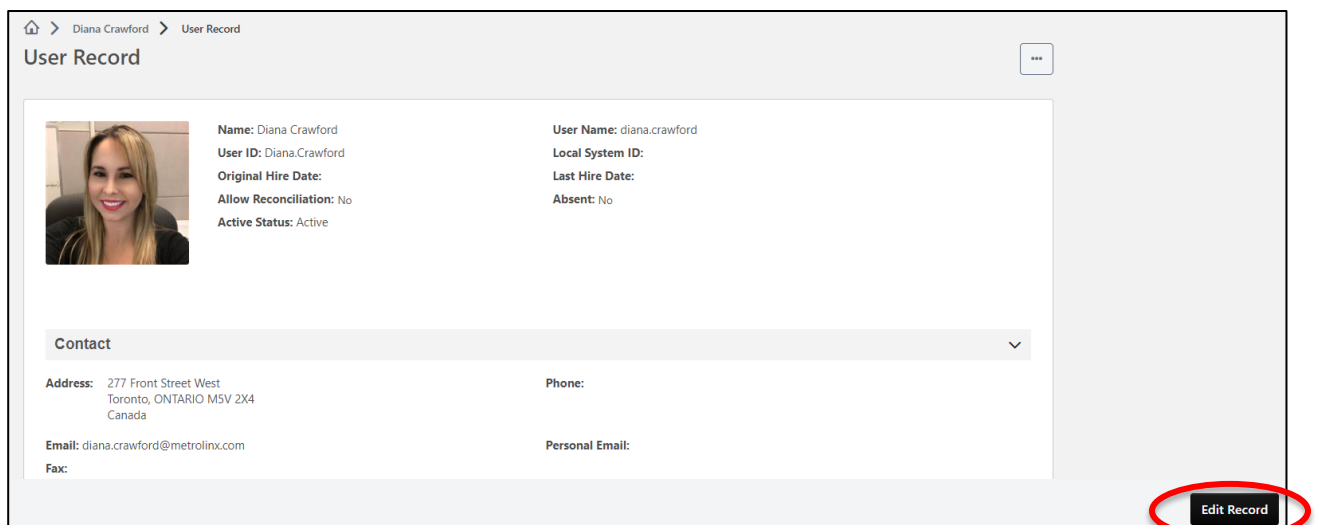
- In the **Users** page, enter information into the **search filters** and click on the **Search** button to retrieve results. Search results appear in the bottom of the page.



- 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.



- 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.

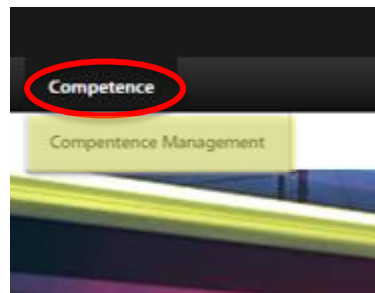
General Contractor Administrator — Competence Management

General Contractor Administrators have additional functionality where they can view and verify the status of their company workforce and subcontractor company workforce PTS certifications for the projects they are managing. Employee PTS status can be listed as:

- **Certified** – Successfully completed the PTS course and is certified. It is important to note that even though it indicates as certified, it does not mean the certification is still valid. It may be expired. Refer to the Reporting Job Aid to generate competence reports which indicate expiry.
- **In Progress** – In progress of completing the PTS course certification. This status does not permit access to the site.
- **On Hold** – The employees PTS certification is on hold until further notice. This status does not permit access to the site.
- **Revoked** – The employees PTS certification was permanently revoked. They can no longer work Metrolinx projects or access the site.

If you require this access as a GC Administrator, please submit the access request to email address MXSafetyCompetence@metrolinx.com.

1. From within the **Welcome** page, hover over the **Competence** tab and select the **Competence Management** option from the dropdown.



2. From within the Certification Management page, click on the **View Users** icon for the **Personal Track Safety** option.



Certification Management 




Manage Certifications

 Manage Pending Requests  Export to Excel

Certification Title Family Category English (US) Include inactive (2 Results)

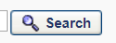
Title	Description	Version	Language	Last Modified	Owner(s)	Status	Options
Personal Track Safety	Certificate to validate the completion of the Personal Track Safety course	2.0	English (US)	1/25/2021 1:43 PM	Auditor, Test Auditor1, Test ...	Active	

3. Use the filter to search for the employee (e.g. Employee Last Name) and click on the **Search** button.

Search for Users:					
Select OU Criteria	Employee Last Name: Crawford			(1 Result)	
Name	User ID	Identifier	Version	Current Status	Options
Crawford, Diana	Diana.Crawford	Metrolinx (Division)	2.0	In Progress	 

4. The employee appears on the screen. Under the **Current Status** column you can see the status of the workers PTS certification to know whether they are authorized to access and work on the site.

It's important to note that you must never delete a users record using the Trash Bin icon. If you mistakenly delete a record, contact MXSafetyCompetence@metrolinx.com immediately so it can be rectified.

Search for Users:					
Select OU Criteria	Employee Last Name: Crawford			(1 Result)	
Name	User ID	Identifier	Version	Current Status	Options
Crawford, Diana	Diana.Crawford	Metrolinx (Division)	2.0	