

Profile Management

www.htvn.org

Manage User Profiles

A user profile is required for each staff member in your organization. The **People Page** allows you to search for existing user profiles and then perform actions on those profiles. This page also provides the option to create a new user profile.

Navigate to the people page

1. Place your cursor over **Manage** in the gray navigation bar.
2. Select **People**.

Find users

1. Enter a user's name (first, middle, or last), email address, and/or login ID in the Search field.
Note: You may enter a partial email address. For example, if a user's email address is janedoe@mycompany.com, you may enter @mycompany.com in the search field.
2. Select **Search**. A list of user accounts matching your search criteria display.
Note: To view information about a user, select the information icon that corresponds to his or her name.

Take action on a user profile

Each user profile displayed in your search results has a corresponding Action menu, which lists the tasks you can perform for that account.

Action items include:

- **Edit Activity:** Allows you to de-activate a user's profile so it can no longer be accessed by the user. A user profile can be re-activated at any time.
- **Edit Profile:** Allows you to change any element of the user's profile.
- **Login Assistance:** Allows you to reset a learner's password. The temporary password will display in the pale green confirmation box at the top of the screen. The learner will be prompted to changed their password when they log in.
- **View Transcript:** Allows you to view a user's transcript and print certificates of completion.

1. From the search results on the people page, select your **Desired Action** from the Action menu.
2. Select **Go**. The appropriate window displays.
3. Make your desired changes and select **Save**.

For help:

1. Select **?** located at the top of each page for help on the specific page you are currently on
2. If you need technical assistance email htvnsupport@housingcenter.com

Create a New User Profile

This option allows you to create a new user profile by entering basic information about a user. Once the account has been created, the system automatically sends an email to the user, providing him or her with a temporary password and a link to the login page. *Note: A red star indicates a field or menu is required.*

Create the profile:

1. Place your cursor over **Manage** in the gray navigation bar.
2. Select **People**.
3. Select **Create Account**. The Create Account page displays.
4. Enter the new user's **complete email address** into the **Login ID** field.
5. Enter the new user's **complete email address** into the **Email Address** field.
Note: The system will send a welcome email to this address when the account is created.
6. Enter the user's first, middle, and last names in the appropriate fields.
7. Use the **Select** button in the **Organization** field to open the Select Organizations window.
8. Enter your organization's name and select **Search**.
9. Use the **radio button** to select your organization.
10. Select **Save**. The window closes and the organization is added to the user's account.
11. **Optional – Add job title**
 - 11.1. Use the **Select** button in the **Job Title** field to open the Select Job Title window.
 - 11.2. Enter keywords in the **Find Job Title** field.
 - 11.3. Choose a **Search Type** from the menu.
 - 11.4. Select **Search**. A list of results matching your search criteria display.
 - 11.5. Use the **radio button** to select the user's job title.
 - 11.6. Select **Save**. The window closes and the job title is added to the user's account.
12. **Optional – Assign user's manager**
 - 12.1. Use the **Select** button in the **Manager** field to open the Select Managers window.
 - 12.2. Enter the manager's first and last name in the **Find Manager** field.
 - 12.3. Select **Search**. A list of results matching your search criteria display.
 - 12.4. Use the **radio button** to select the user's manager.
 - 12.5. Select **Save**. The window closes and the manager is added to the user's account.
13. Select **Create**. The system creates the account and sends an email to the user, providing him or her with a temporary password and a link to the login page.

Includes copyrighted materials from a company under the HAI Group® family, with its permission.