This is one of a series of Job Aids to make it easier for you to navigate the VSLO Application Service. To see a complete list of job aids, please visit our training page for institutions and students. If you have questions, please don't hesitate to contact our customer support team for assistance by calling (202) 478-9878 (8:00 am -6:00 pm ET), or by email.

# *Home and Host – Manage Staff Users*

- Create and Invite Users
- View Active and Inactive Users
- Edit Users
- Activate and Deactivate User
- Review User Invitations

| | ***STEP*** | ***ACTION*** | ***Notes*** |
|---|---|---|---|
| *1* | From MAIN screen, click *User Management* dropdown. | *User Management* dropdown displays options:<br>• Roles<br>• Users | Some MAIN screen options will vary for HOME or HOST institutions according to what is applicable to the user.<br><br>Institutions that are both a Home and Host will show both HOME and HOST options.<br><br>Based on the user's access to the software, some screens may not be available, and will not show in the dropdown menu. Users will only see screens to which they have access. |
| *2* | Click *Users* | The VISITING STUDENT LEARNING OPPORTUNITIES (VSLO)/Users screen appears. | |
| *3* | ***Create and Invite Users*** | | |

| | STEP | ACTION | Notes |
|---|---|---|---|
| 4 | Click *on +Invite User* button on right side of screen. | The INVITE USER popup screen appears. | |
| 5 | Enter the requested information by pressing TAB or moving the cursor move between fields and type in the information. | Information Requested:<br>• *First Name*<br>• *Middle Name (optional)*<br>• *Last Name*<br>• *Email*<br>• *Confirm Email*<br>• *Assign Roles* | |
| 6 | While still in popup screen, press TAB or click mouse to move cursor to the ASSIGN Roles field. | | |
| 7 | In ASSIGN Roles, click on *Click here to select or type a search item.* | A drop down menu of ROLES will appear. | |
| 8 | Use your mouse to click on a selected role(s) to be assigned to this individual. | The selected roles will appear under the ASSIGN FIELDS field. | Multiple roles can be selected. Click on “X” to remove a selected role. |
| 9 | When finished assigning roles, click the *Invite User* button at the bottom of the Invite User popup. | You will be returned to the MANAGE USERS screen. | |
| 10 | Check to verify that the user created displays on the list of users invited. | | This is viewed through the *Review User Invitations* tab. |
| 11 | ***View Active and Inactive Users*** | | |

| | STEP | ACTION | Notes |
|---|---|---|---|
| 12 | From MAIN screen, click *User Management* dropdown. | *User Management* dropdown displays options:<br>• Roles<br>• Users | |
| 13 | Click *Users* | The VISITING STUDENT LEARNING OPPORTUNITIES (VSLO)/Users screen appears displaying of list of active and inactive users. | |
| 14 | **Edit Users** | | |
| 15 | From MAIN screen, click *User Management* dropdown. | *User Management* dropdown displays options:<br>• Roles<br>• Users | |
| 16 | Click *Users* | The VISITING STUDENT WEB/Users screen appears. | |
| 17 | Click on the *Edit* button for that user. | The EDIT USER popup screen appears. | Edit button is on the far right of the screen, just above the Remove button.<br><br>The only field that can be edited is the *Assign Roles* section.<br><br>The *Name* and *Email* fields can be updated by the staff member when logged into VSAS. |
| 18 | To make changes to *Assign Roles,* use cursor to click on the down arrow for a drop down menu or type in an assigned role. | The name of the role will appear in a shaded blue box with an "x" next to the role. | Clicking the X attached to a role will remove the role. |

| | STEP | ACTION | Notes |
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| 19 | When finished making changes, click the *Update* button on the bottom of the screen. | You will be returned to the USERS screen. | There will be a banner displayed briefly across the top of the screen stating *Success, User Successfully Saved*. |
| 20 | ***Activate and Deactivate Users*** | | |
| 21 | From MAIN screen, click *User Management* dropdown. | *User Management* dropdown displays options:<br>• Roles<br>• Users | From MAIN screen, click *User Management* dropdown. |
| 22 | Click *Users* | The VISITING STUDENT LEARNING OPPORTUNITIES (VSLO)/Users screen appears. | Click *Users* |
| 23 | The Users on the *Manage Users* list are both active and inactive users. | | |
| 24 | To activate a user, click on the *Activate* button located on the right side of the screen. | The ACTIVATE USER popup screen will appear. | In this screen you may only the Assigned Roles. The user can edit their name and email address when they are logged into VSAS. |
| 25 | When finished making changes, click the *Update* button on the bottom of the screen. | You will be returned to the USERS screen. | There will be a banner displayed briefly across the top of the screen stating *User Successfully Saved*. |
| 26 | To deactivate a user, click the *Deactivate* button located on the right side of the screen. | The DEACTIVATE USER popup screen will appear. | |
| 27 | Click on the *Deactivate* button. | The User will be deactivated. You will be returned to the USERS screen | There will be a banner displayed briefly across the top of the screen stating *User Successfully Deactivated.* |
| 28 | ***Review User Invitations*** | | |

| | STEP | ACTION | Notes |
|---|---|---|---|
| 29 | From MAIN screen, click *User Management* dropdown. | *User Management* dropdown displays options:<br>• Roles<br>• Users | From MAIN screen, click *User Management* dropdown. |
| 30 | Click *Users* | The VISITING STUDENT WEB/Users screen appears. | Click *Users* |
| 31 | On the top left of screen, click on *Review User Invitations* tab. | The REVIEW USER INVITATIONS screen will appear. | |
| 32 | The Users on the screen have Sent and Expired Invitations | | |
| 33 | To resend an invitation, click on the *Resend* button located on the right side of the screen. | The invitation will automatically be resent to the user, and you are not able to edit the user's information. | |
| 34 | To cancel a Sent invitation, click on the *Cancel* button located on the right side of the screen. | The CANCEL INVITATION popup screen will appear. | |
| 35 | To reissue an invitation on the list, click the *Reissue* button located on the right side of the screen. | The REISSUE INVITATION popup screen appears. | |
| 36 | Enter the *First Name, Middle Name (optional), Last Name, Email and Confirm Email*. Press TAB to use the cursor to move between fields. | | It is optional to update/change any of the user information. |
| 37 | While still in popup screen press TAB or click mouse to move cursor to the ASSIGN FIELDS field. | | |
| 38 | In ASSIGN FIELDS, click on *Click here to select or type a search item.* | A drop down menu of *Roles* will appear. | This is optional to update. |

| | ***STEP*** | ***ACTION*** | ***Notes*** |
|---|---|---|---|
| *39* | Use your mouse to click on selected roles to be assigned to this individual. | The selected roles will appear under the ASSIGN FIELDS field. | |
| *40* | When finished assigning roles, click the *Reissue* button at the bottom of the INVITE USER popup. | You will be returned to the REVIEW USER INVITATIONS screen. | |
| *41* | From MAIN screen, click *User Management* dropdown. | *User Management* dropdown displays options:<br>• Roles<br>• Users | From MAIN screen, click *User Management* dropdown. |