

# TDA-GO

## New User Registration

### New User

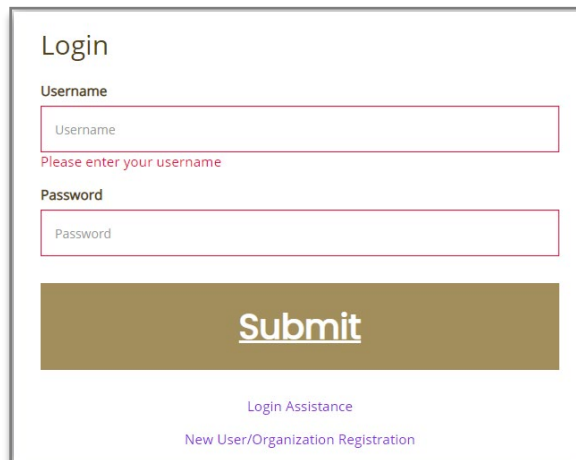
The TDA GO portal allows the user to request access to the system. Once the submission is sent, TDA will approve the user and the organization and apply the applicable security roles: Authorized Official, Project Director, and Consultant/Researcher. For Consultant/Researcher, please see the special instructions in red text.

#### Steps to Get Started:

- The initial Registration for your organization must be completed by an Authorized Official (AO) for the organization
- Once the AO registers the organization, they will receive an email *Notification of Access Approval* from the online systems administrator
- The AO can then designate access to your organizational account for additional staff members as they deem appropriate.

To register a New User, complete the following steps:

- 1) Click on the ***New User/Organization Registration*** link.



Login

Username

Please enter your username

Password

**Submit**

[Login Assistance](#)

[New User/Organization Registration](#)

- 2) Fill in the required fields and any optional fields desired. See Legend below for specific field instructions. Click on the ***Save*** button.

## Legend

**First Name (Required)** – the first name of the registering user.

**Middle Name** – the middle name of the registering user.

**Last Name (Required)** – the last name of the registering user.

**DUNS (Required)** – the DUNS number for the organization the user is registering with. Enter in the DUNS number and click **Search** to locate the DUNS number for that organization. If you do not have a DUNS enter all zeros (e.g. 000000000) in this box.

**Organization (Required)** – the name of the organization the registering user wants to register under. A *Consultant with an entity separate from yours* will register for this system **separately** from you.

**Title** – the position title of the registering user.

**Street Address (Required)** – the street address of the organization the user is registering for.

**State (Required)** – the state drop-down selection for the state of the registering user's organization.

**County (Required)** – the county drop-down selection for the county of the registering user's organization.

**City (Required)** – the name of the city of the registering user's organization.

**Zip Code (Required)** – the zip of the registering user's organization.

**Email (Required)** – the email address of the registering user.

**Phone (Required)** – the phone number of the registering user.

**Username (Required)** – the username the registering user wishes to register for.

**Password/Verify Password (Required)** – the password the registering user wishes to register for.

The screenshot shows a 'New User Registration' form with the following fields and controls:

- First Name: Text input field
- Middle Name: Text input field
- Last Name: Text input field
- DUNS: Text input field with a 'Search' button
- Organization: Text input field
- Title: Text input field
- Address: Text input field
- Address 2: Text input field
- State: Drop-down menu
- County: Drop-down menu
- City: Text input field
- Zip Code: Text input field
- Email: Text input field
- Phone: Text input field
- Username: Text input field
- Password: Text input field
- Verify Password: Text input field
- Save: Button at the bottom right

3) Once saved, the New User will be approved by TDA GO portal staff. After approval, the New User can log on and access the TDA Go platform. You should receive an email indicating approval in the system.

**NOTE: If a user attempts to access the system before they have been approved, the system will show their password as invalid.**

## User Information

Once a User logs into the system, their **Profile** page and a list of organizations the individual belongs to is visible.

### Profile

#### Basic Information Legend

**First Name** – the first name of the individual.

**Middle Name** – the middle name of the individual.

**Last Name** – the last name of the individual.

**Prefix** – an optional prefix for the individual.

**Suffix** – an optional suffix for the individual.

**Title** – the position title for the individual.

**Primary Phone** – the primary phone number for the individual.

**Secondary Phone** – the optional secondary phone number for the individual.

**Email** – the email address of the individual.

#### Address Information Legend

**Street Address** – the street address for the individual.

**City** – the city the individual's street address is in.

**State** – the dropdown menu of the state the individual's street address is in.

**Zip** – the zip code the individual's street address is in.

**County** – the dropdown menu of the county the individual's street address is in.

#### Additional Information Legend

**Job Certification** – a repository for uploading personal certification forms.

**Security Image** – an optional security image to implement as an additional security measure.

**Username** – username of the individual and a button that allows the individual to update the username.

**Password** – current password of the individual and a button that allows the individual to update the password.

### Profile

#### Basic Information

First Name <input type="text" value="Delane"/>	Middle Name <input type="text"/>	
Last Name <input type="text" value="System Admin"/>	Prefix <input type="text" value=""/>	Suffix <input type="text" value=""/>
Title <input type="text" value="System Administrator"/>		

#### Contact Information

Primary Phone <input type="text" value="(123) 456-7890"/>	Secondary Phone <input type="text"/>
Cell <input type="text"/>	
Email <input type="text" value="rshell@agatesoftware.com"/>	

#### Address Information

Street Address <input type="text" value="123 Test Street"/>	
Address2 <input type="text"/>	
State <input type="text" value="Texas"/>	County <input type="text" value="Armstrong County"/>
City <input type="text" value="Test City"/>	ZIP <input type="text" value="12345"/>

#### Additional Information

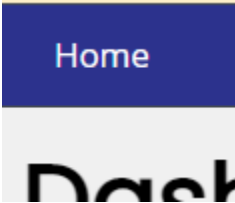
Job Certification <input type="text" value="Select"/>
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#### Login Information

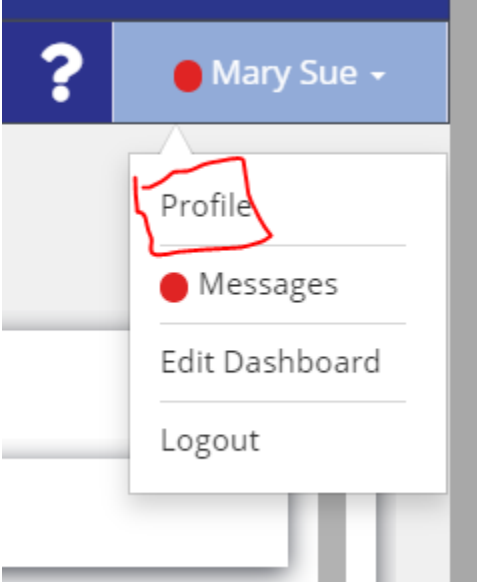
Security Image <input type="text"/>	<input type="button" value="Update Security Image"/>
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# Add other users to Organization

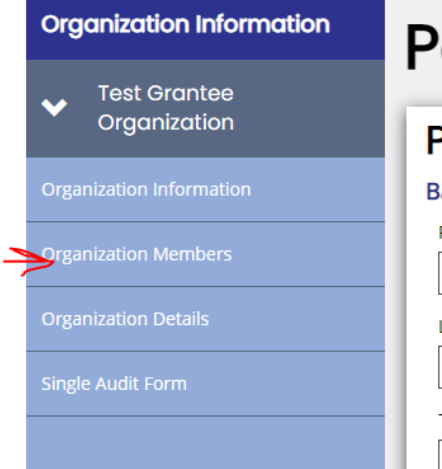
Click the home button



Then click on your name → profile



Click Organization Members



Click on the + to add new members

## Organization Members

**Instructions:**

- Use the available search criteria to filter the members table.
- To add a new member, click the Add New button and follow the instructions.
- You can limit system access by setting the Active/Inactive dates.

### Members Search

Name

Role

Active



### Add Person

**Instructions:**

- Enter new Person information and Save.
- New Person will be added to Organization currently being viewed.

**General Information**

First Name

Middle Name

Last Name

Title

Prefix

Suffix

**Contact Information**

Address

City

Zip Code

Primary Phone

State

County

Email

**Assign Roles**

Role

Active Date

Inactive Date

**Security Information**

Username

Username is required.

Password

Password is required.

Fill in the **Add Person** form and click the **Save** button.

### Legend

**First Name (Required)** – the first name of the new user.

**Prefix** – a drop-down menu to select a prefix from for the new user.

**Last Name (Required)** – the last name of the new user.

**Suffix** – a drop-down list of suffixes to choose for a new user.

**Title** – the position title of the new user.

**Address (Required)** – the street address of the organization of the new user.

**City (Required)** – the name of the city of the new user’s organization.

**State (Required)** – the state drop-down selection for the state of the new user’s organization.

**Zip Code (Required)** – the zip of the new user’s organization.

**County (Required)** – the county drop-down selection for the county of the new user’s organization.

**Primary Phone (Required)** – the phone number of the new user.

**Email (Required)** – the email address of the new user.

**Role** – a drop-down menu to select a role for the new user.

**Active Date** – a date selection tool to select the active date for the new user.

**Inactive Date** – a date selection tool to select the inactive date for when the user is no longer active.

**Username (Required)** – the username the new user wishes to register for.

**Password (Required)** – the password the new user will be registered with. The user can reset this.