

Texas Administrator Guide

UPDATED OCTOBER 12, 2023

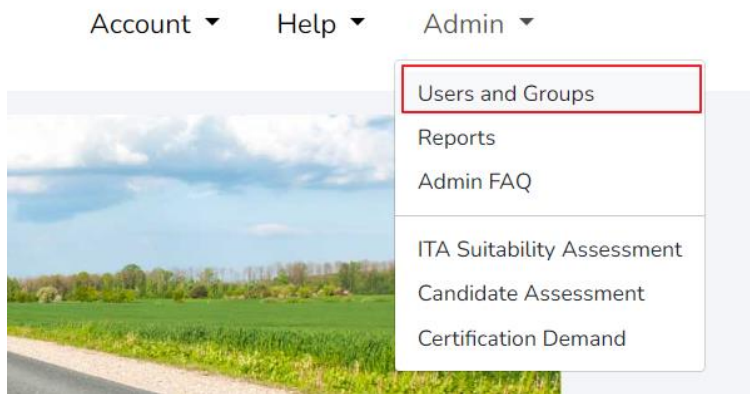


Creating New Accounts

Watch a video tutorial here: [Adding a New User through the User Wizard](#)

Go to your login portal and sign in with your administrator account.

In the top menu, select **Admin > Users and Groups**.



Click **Create a New User**.

Administration - Users & Groups

Use the section below to administer all of the users & groups of Metrix Learning.

Users

[+ Create New User](#)

[Edit Users](#)

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Step 1 – Basic Information

- Create a unique username – this can be an email address, a first name last name combination, or include numbers (NO spaces are allowed)
- Customize the password – this can be letters, numbers, and special characters (NO spaces are allowed)
- Enter basic information
- **All accounts need a valid email address** – without an email address, the learner will not receive their welcome email with their username and password
- Internal ID – the WorkInTexas 9-digit number ID can be entered here
- Comments – any notes or comments can be entered here viewable to Metrix administrators only
- Click **Next**

[Basic Information](#) [Report Tags](#) [Optional Tags](#) [Licenses](#) [Account Privileges](#)

Username *	<input type="text"/>
Password *	<input type="password"/>
Confirm Password *	<input type="password"/>
Manager	<input type="text" value="No Manager"/>
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Email *	<input type="text"/>
City *	<input type="text"/>
State	<input type="text" value="NY"/>
County	<input type="text" value="Albany"/>
Zip *	<input type="text"/>
Internal ID	<input type="text"/>
Comments	<input type="text"/>

Save

Next


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Step 2 – Report Tags

- Assign relevant report tags
- Select the appropriate report location from the dropdown menu
- Click **Next**



Administration - Add/Edit User Tags

[Basic Information](#) **[Report Tags](#)** [Optional Tags](#) [Licenses](#) [Account Privileges](#)

Location

Department

Background

Disability **ESL** **Ex-offender** **Homeless** **Veteran**

Programs

PY16-17 **SNAP** **TechHire**

Services

Apprenticeship **Career Pathway** **Career Service** **Internship** **Metrix Orientation**

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Step 3 – Licenses

- Select the bubbles for course licenses to assign
 - Skillsoft – Workplace Skills, Business, Leadership, Technology courses
 - ProveIT – Skill assessments
 - TPC – Manufacturing & Skilled Trades courses
 - MedVideos – Health Care videos
- Click **Assign Licenses**
- The page will refresh and show the now active licenses with their expiration date

Administration - Manage Licenses

Show Active Licenses ▾ Basic Information Report Tags Optional Tags Licenses Account Privileges

User: Test Test (txdemo3 - 251821)
Group: HQ / **Organization:** NY Wired for Education (2)

Assigned Licenses (Active):

Provider	Status	Use Type	Counter	Assigned	Expires	Actions
----------	--------	----------	---------	----------	---------	---------

Additional license(s) available for this user:

SkillSoft

None

SS180Day (297 left)

Assign License

- If assigning any custom tracks, select and click to assign the cluster to pre-load courses to the learning plan
- Click **Next**

Cluster: None ▾ **Assign**

Metrix Customer Service

Metrix Working Remotely

MS Excel 365: 101

MS Excel 365: 102

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Step 4 – Account Privileges

- By default, the system will automatically select the customer access level for new accounts. No changes are needed on this page.
- Click **Finish** to complete the set up.

Basic Privileges

Account Status	Active ▼
Privileges	Customer ▼
Dashboard	Portal ▼
Recycle License Date:	07/24/20
Archive	<input type="checkbox"/>

Admin Privileges

Edit Groups	<input type="checkbox"/>
Group Restrict	<input type="checkbox"/>
Demo Account	no ▼
Job Admin	<input type="checkbox"/>
Assign Attribute Content	<input type="checkbox"/>

Catalog Privileges

Digital Literacy Assess	<input type="checkbox"/>
Full Catalog	<input checked="" type="checkbox"/>
Attribute Content Only	<input type="checkbox"/>
Pathways	<input checked="" type="checkbox"/>
Language	English ▼
x508	<input type="checkbox"/>

Previous Save **Finish**

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The confirmation page indicates the account has successfully been created. A welcome email will be sent to the learner with their login information.



Administration - User Setup Complete

[Basic Information](#) [Report Tags](#) [Optional Tags](#) [Licenses](#) [Account Privileges](#)

User Test Test
(txdemo3) has been set up successfully.

[Edit This User](#)

[Edit Learning Plan](#)

[Return to User List](#)

[Add Another User](#)

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Editing Accounts

Watch video tutorials here:

- [Editing Users Overview](#)
- [Editing Users - Assigning a License](#)
- [Editing Users - Assigning a Cluster](#)

Go to your login portal and sign in with your administrator account.

In the top menu, select **Admin > Users and Groups**.

Enter information into the "Keyword" field to search. Users can be searched by:

- First Name
- Last Name
- Email address
- Username
- UserID number

User ID	User Name	Account Type	Start Date	End Date	Track
30035	admin_allegany	Organization Admin	04/15/2008	09/30/2011	0
30036	allegtest	Customer	04/18/2008	04/18/2009	2
30038	allegtest1	Customer	04/18/2008	04/18/2009	1

When the user is found, click "Edit" to view their profile.

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The Account Profile will list basic account information and links to manage the account:

- Click "Manage Profile" to update names or email addresses.
- Click "Manage Licenses" to assign new licenses or course clusters to the account.
- Click "Manage Plans" to manually edit assigned courses or assign individual courses to a learner's plan.
- Click "View Reports" to check report scores and see/download certificates of completion available.

Administration - metrixdemo2023's Home

This is the User Panel for **metrixdemo2023**

metrixdemo2023's Account

Member Since	January 5, 2023
Last Log In	August 18, 2023
Organization	NY Wired for Education
Primary Group	HQ
Account Role	Customer
OSOS ID	n/a

Account

[Edit Account](#)

Tasks

[Manage Profile](#)
[Manage Plans](#)
[Manage Licenses](#)
[View Reports](#)
[View Pathway](#)

Overdue Activities	^
Upcoming Activities This Month	v

System Reports

Various reports are available to look at overall activity. Access the reports in the top menu, select **Admin > Reports**.

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Support Team



Technical Support for Learners – Email or Phone

Mon-Fri, 8am-6pm CST

customersupport@metrixlearning.com

518-462-1780



Support for Administrators – Contact our Customer Success Team

customersuccess@metrixlearning.com

Weekly Administrator Training Wednesdays at 1:00pm CST:

<https://bit.ly/MetrixAdminTraining>