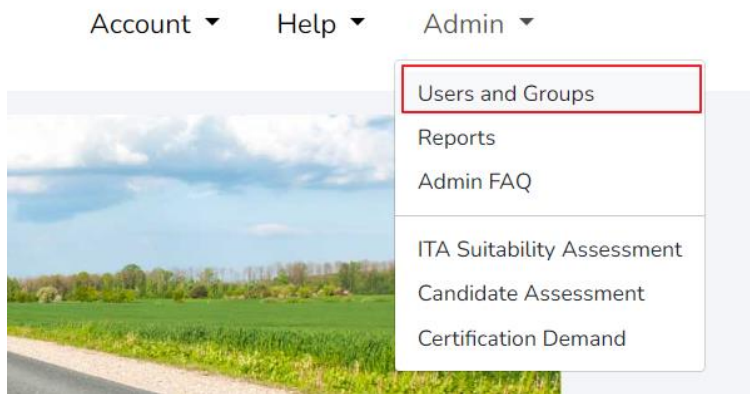# Texas Administrator Guide

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**.

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 *	[ ]
Password *	[ ]
Confirm Password *	[ ]
Manager	No Manager ▾
First Name *	[ ]
Last Name *	[ ]
Email *	[ ]
City *	[ ]
State	NY ▾
County	Albany ▾
Zip *	[ ]
Internal ID	[ ]
Comments	[ ]

Save   Next

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   HQ (3941)

Department   None

Background

☐ Disability   ☐ ESL   ☐ Ex-offender   ☐ Homeless   ☐ Veteran

Programs

☐ PY16-17   ☐ SNAP   ☐ TechHire

Services

☐ Apprenticeship ☐ Career Pathway   ☐ Career Service   ☐ Internship   ☐ Metrix Orientation

Previous   Save   Next

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

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

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	☐

Admin Privileges

Edit Groups	☐
Group Restrict	☐
Demo Account	no
Job Admin	☐
Assign Attribute Content	☐

Catalog Privileges

Digital Literacy Assess	☐
Full Catalog	☑
Attribute Content Only	☐
Pathways	☑
Language	English
x508	☐

Previous   Save   **Finish**

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

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

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

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	⌄

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