

Texas Administrator Guide

UPDATED OCTOBER 12, 2023

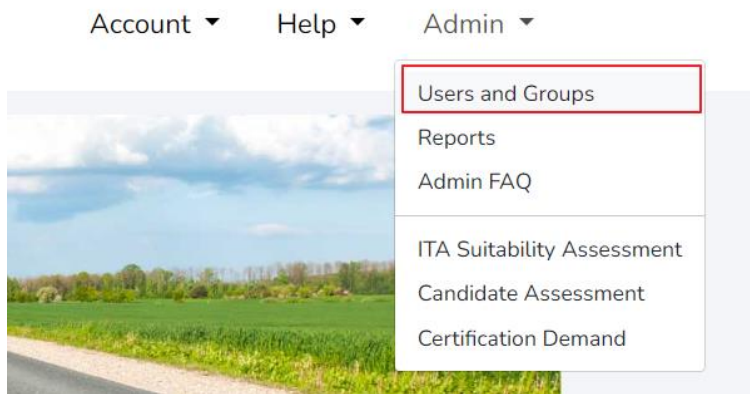


Creating New Accounts

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

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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

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](#)

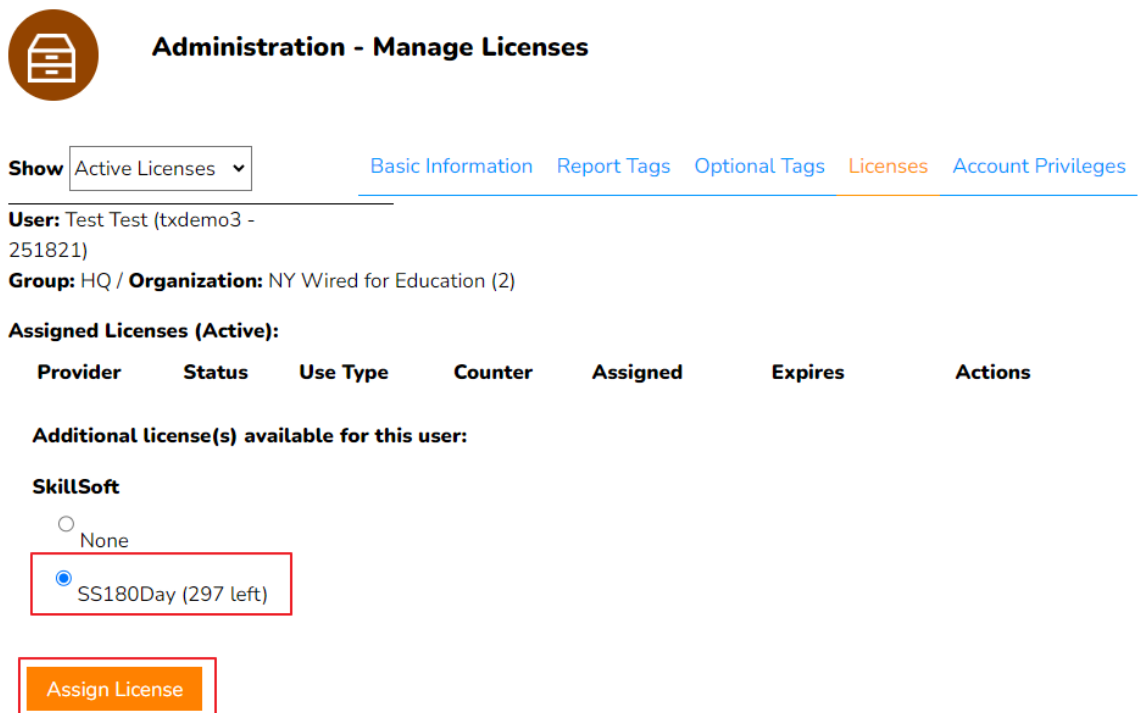
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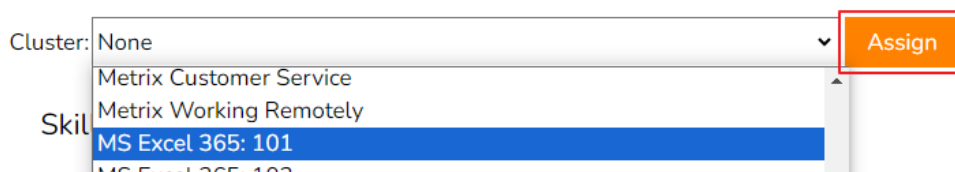
Step 3 – Licenses

- 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



The screenshot shows the 'Administration - Manage Licenses' page. At the top, there's a 'Show' dropdown set to 'Active Licenses' and a navigation bar with tabs: 'Basic Information', 'Report Tags', 'Optional Tags', 'Licenses' (highlighted), and 'Account Privileges'. Below this, user information is displayed: 'User: Test Test (txdemo3 - 251821)' and 'Group: HQ / Organization: NY Wired for Education (2)'. A section titled 'Assigned Licenses (Active):' contains a table with columns: 'Provider', 'Status', 'Use Type', 'Counter', 'Assigned', 'Expires', and 'Actions'. Below the table, it says 'Additional license(s) available for this user:' followed by 'SkillSoft'. Under 'SkillSoft', there are two radio button options: 'None' and 'SS180Day (297 left)', with the latter being selected. At the bottom left, there is an 'Assign License' button.

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



The screenshot shows a 'Cluster:' dropdown menu. The current selection is 'None'. The dropdown list is open, showing several options: 'Metrix Customer Service', 'Metrix Working Remotely', 'MS Excel 365: 101' (highlighted in blue), and 'MS Excel 365: 102'. To the right of the dropdown, there is an 'Assign' button.

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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	☐

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**

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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

Metrix Learning

Admin > Users and Groups

Choose a user below to begin administering them

Showing 1 to 25 of 641314 record(s)

Filter: All Keyword Go

[All](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

User ID	User Name	Account Type	Start Date	End Date	Tracked
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



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>