



Account Owner and Administrator

User Guide



COGNIA HOME

Table of Contents

Introduction	1
Overview	1
Support.....	1
User Roles and Permissions.....	1
Institutional Management.....	2
Viewing an Institution	2
Editing an Institution's Profile	5
Editing an Institution's Logo	5
Submitting an Information Update Request	6
User Management.....	7
Viewing Users	7
Adding a New User.....	9
Adding New Users Individually	9
Importing a Group of Users	10
File Upload Errors	12
Resending a User's Invitation	13
Canceling a User's Invitation	14
Editing a User's Role	16
Disabling/Enabling a User's Account	18

Introduction

This document covers institutional and user management for Account Owners and Administrators in Cognia™ Home.

Overview

Cognia Home is the center point of the Cognia digital experience for users related to the products and services supporting Accreditation, Assessment, School Improvement, and Professional Development made available to our membership. Cognia Home includes tools for administrators to manage users and institutional profiles to facilitate a complete and engaging experience with Cognia's products and services.

Support

Cognia Client Care representatives are available to answer questions about managing institutions and user accounts. Please use the email and phone numbers listed below to contact Cognia for support.

Email: clientcare@cognia.org

Phone: (888) 413-3669

Hours: 7:00 a.m. – 7:00 p.m. ET, Monday–Friday

User Roles and Permissions

Cognia Home recognizes three user roles: Account Owner, Admin, and User. The role of Account Owner is automatically assigned to the Head of Institution (HOI) and Primary Contact (PC).

Each role has a separate set of permissions, which determine the user's level of access to the institutions and components available within the application. Permissions that apply to each role are dependent on the institution level for each user.

Function	Account Owner	Admin (Parent Institution)	Admin (Child Institution)	User
User Management				
View, invite, and disable/enable users under the institution's hierarchy	X	X	X	
Institution Management				
View institutions under the hierarchy	X	X		
Update an institution's logo	X	X	X	
Submit a request to update an institution's profile	X	X	X	
Profile/Account Management				
Update your profile information	X	X	X	X
Update your account information	X	X	X	X

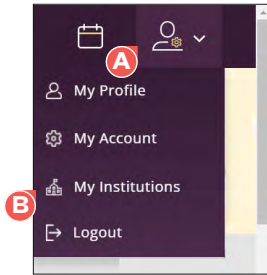


Institutional Management

Viewing an Institution

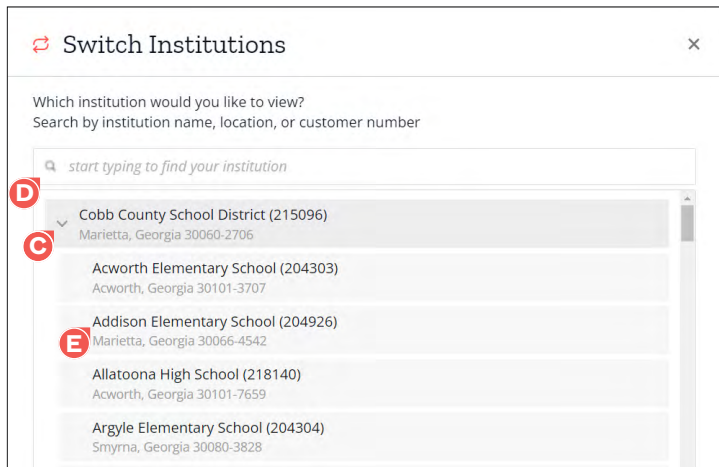
To view an institution:

1. Select the account **A** drop-down located in the upper right corner of the Cognia Home header, and then select **My Institutions** **B**.




If you previously set an institution as your default, or have access to only a single institution, that institution's profile page displays. If you have access to multiple institutions, the **Switch Institutions** popup opens.

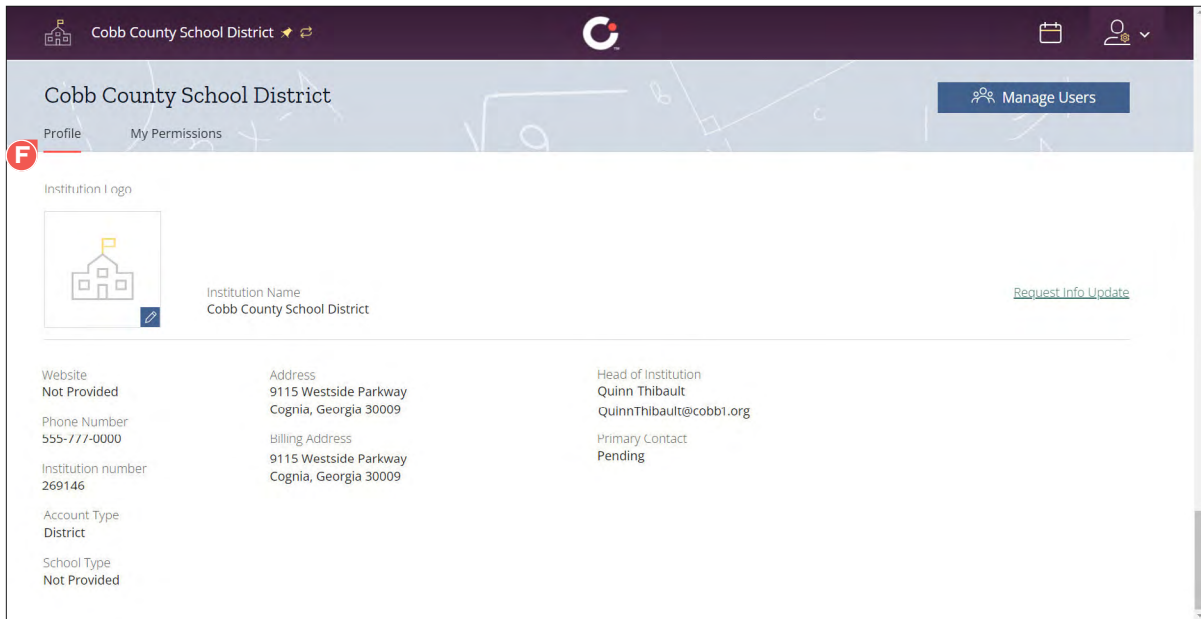
2. For users with access to more than one institution, options for searching institutions include:
 - Select the **caret** **C** icon located to the left of a district to expand the list of the schools under that district's hierarchy.
 - Enter an institution name, location, or customer number in the search **D** field to locate a specific institution. As text is entered into the field, the list updates to display only the institution(s) that match the criteria entered.
 - Select an institution **E** to open that institution's profile page.




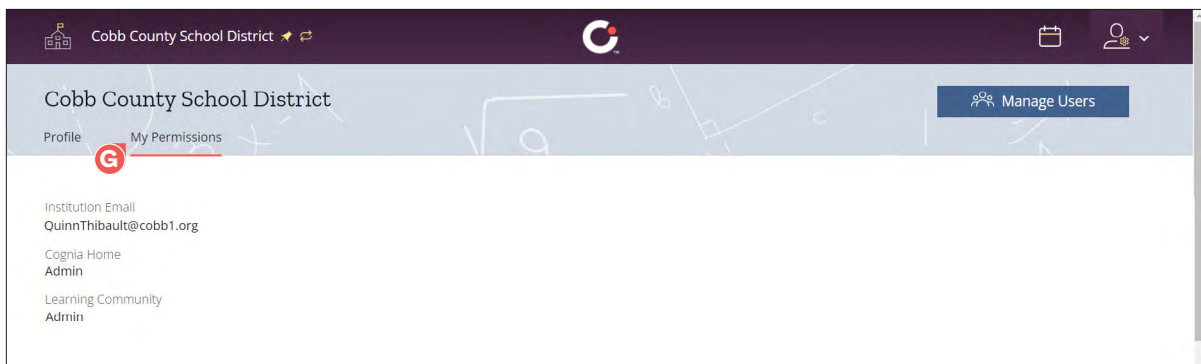
When viewing an institution:

- The **Profile**  tab displays the institution's logo, website, phone number, account type, school type, address, billing address, head of institution, and primary contact.



Note: The Head of Institution (HOI) and Primary Contact (PC) display as 'Pending' until that user has created their Cognia Home account. Once the HOI/PC for an institution has created their account, their name and email will be displayed.

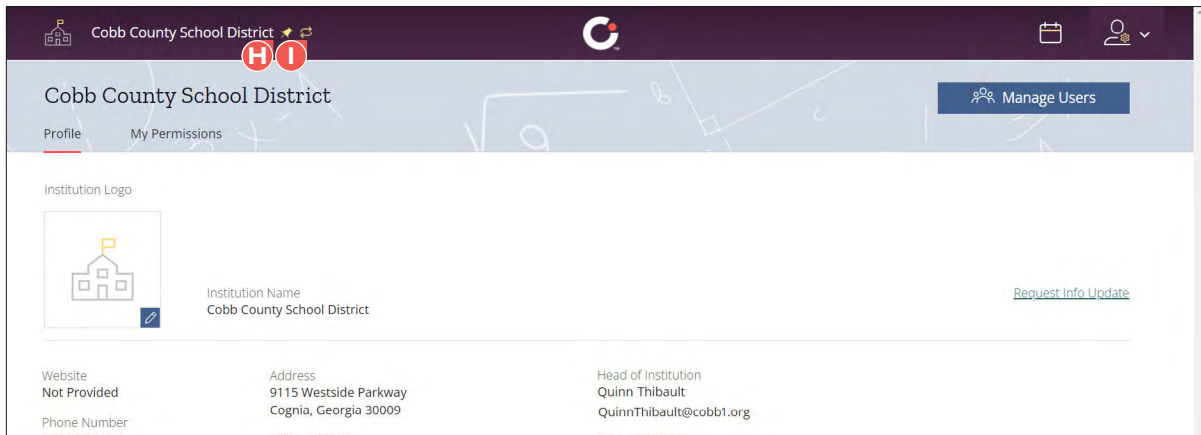


- The **My Permissions**  tab displays your associated email and role for the institution in Cognia Home and the Cognia Learning Community.



For users with access to more than one institution:

- To set the institution currently being viewed as your default institution, select the **pin**  icon located in the upper left of the Cognia Home header beside the institution name. When an institution is set as your default, that institution's profile displays when you select My Institutions from the account drop-down. (The pin icon for your default institution will be yellow.)
- To select a different institution, click the **switch**  icon located in the upper left of the Cognia Home header beside the institution name.



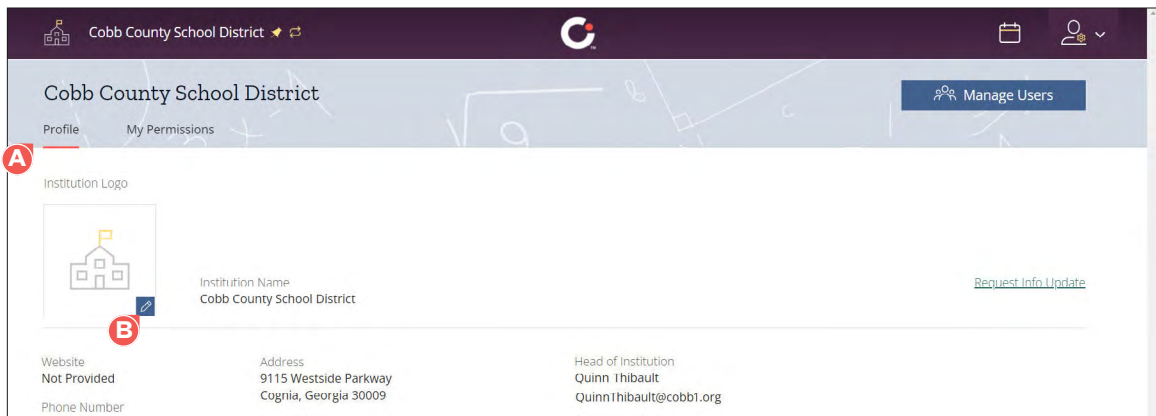
Editing an Institution's Profile

Account Owners and Admins can edit an institution's logo in Cognia Home and can submit a request to Cognia for an institution's profile information to be updated.

Editing an Institution's Logo

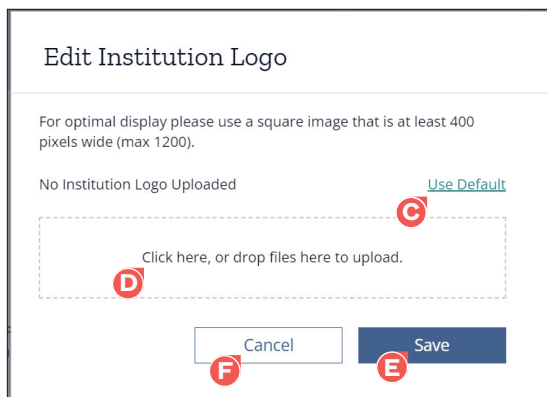
To edit an institution's logo in Cognia Home:

1. Open the institution's **Profile** **A**. [Refer to the section titled *Viewing an Institution* for more information on how to select an institution.]
2. Click the **edit** **B** icon located in the lower-right corner of the institution's logo.



The Edit Institution Logo popup opens.

3. Select **Use Default** **C** to use the default logo, or click in the **upload space** **D** to select a file to upload, or drag and drop the file to the upload space.
- Note:** The image specifications for optimal viewing is displayed in the popup.
4. Click **Save** **E** to save the selected logo. (Click **Cancel** **F** if the logo no longer needs to be changed.)



The institution's logo is updated.

Submitting an Information Update Request

To submit a request for an institution's profile information to be updated in Cognia Home:

1. Open the institution's **Profile** **A**. [Refer to the section titled *Viewing an Institution* for more information on how to select an institution.]
2. Click the **Request Info Update** **B** link located on the far right of the profile.

The screenshot shows the Cognia Home interface for the Cobb County School District. The top navigation bar includes the district name, a logo, and a 'Manage Users' button. Below this, the 'Profile' tab is selected, indicated by a red circle 'A'. The profile information includes the institution's logo, name, website, address, and head of institution. A red circle 'B' highlights the 'Request Info Update' link in the top right corner of the profile section.

The Request Information Update popup opens.

3. Enter the type of information that needs to be updated (i.e. website, phone number, account type, school type, address, billing address, head of institution, and/or primary contact) in the **What needs to be updated?** **C** field.
4. Enter what the correct information is in the **What is the correct information?** **D** field.
5. (Optional) Select the **Can we contact you** **E** checkbox to approve of Cognia contacting you if more information about the request is needed.
6. Click **Save** **F** to submit the request. (Click **Cancel** **G** if the request no longer needs to be submitted.)

The screenshot shows the 'Request Information Update' popup form. It contains two text input fields: 'What needs to be updated?' (labeled C) and 'What is the correct information?' (labeled D). Below these fields is a checkbox labeled 'Can we contact you if we need more information?' (labeled E). At the bottom of the form, there are two buttons: 'Cancel' (labeled G) and 'Save' (labeled F).

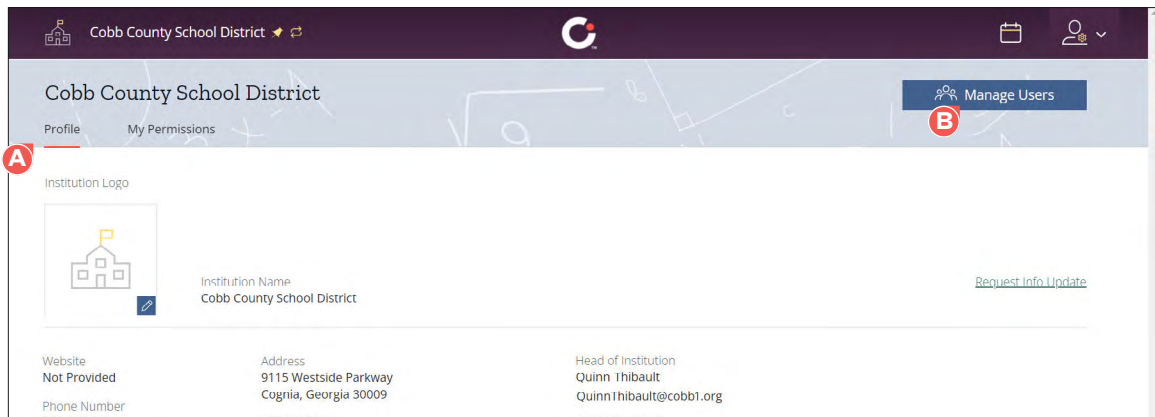
The request is submitted and a "Success" message briefly displays across the top of the page confirming the request was sent.

User Management

Viewing Users

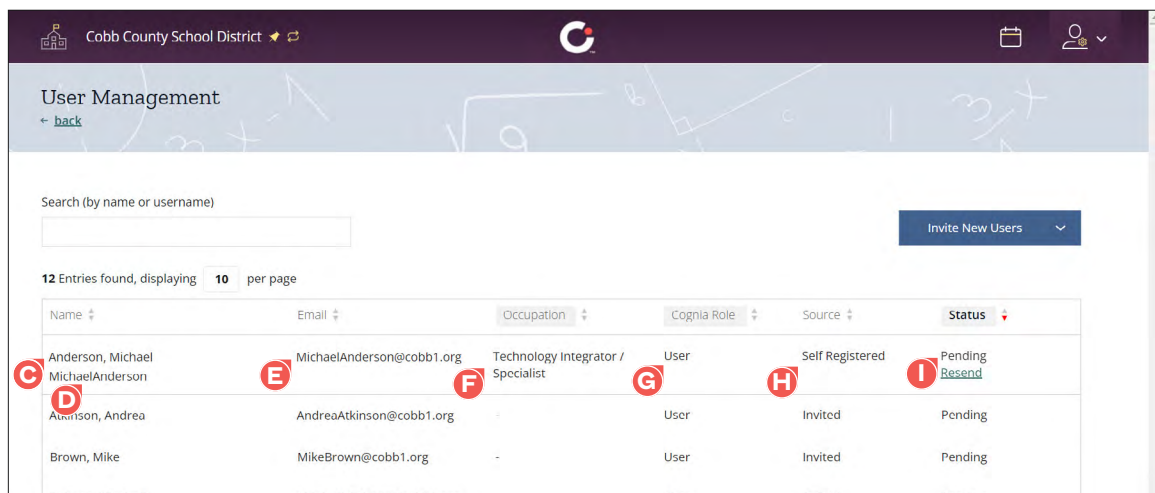
To view users for an institution:

1. Open the institution's **Profile** **A**. [Refer to the section titled *Viewing an Institution* for more information on how to select an institution.]
2. Click the **Manage Users** **B** button located in the upper right of the page.



The list of users within the institution displays. The following information is displayed for each user: **name** **C**, **username** **D** (displayed directly under the user's name), **email** **E**, **occupation** **F**, **role** **G** in Cognia Home, **source** **H** of their account creation, and **status** **I**.

Note: The username and occupation for invited users will not be displayed until the user has completed creating their account, as they will choose a username and select an occupation during the account creation process.



3. Options for viewing users include:

- Enter a name or username in the **Search** **J** field to locate a specific user.
- Enter a specific number of users to display **per page** **K**.
- Select the **arrows** **L** located next to a column header to sort the list of users by that column. Select the arrows a second time to reverse sort it. (When the list is sorted, the arrow for the column and sort order will display as red.)
- Click the **Occupation**, **Cognia Role**, or **Status** **M** column name to select specific options to filter the users by.

Note: The number beside a column name indicates the number of options currently selected in the filter.

- Click **clear all** **N** located in the upper right of the user list to clear all selected filters, or click the **x** **O** beside a filtered column name to remove the filter from only that column.
- Use the **page navigation** **P** located at the bottom of the user list to navigate between the different pages of users. (If there is only a single page of users, the page navigation is not displayed.)

User Management

Search (by name or username)

12 Entries found, displaying 10 per page

Name L	Email	Occupation M	Cognia Role (1) O	Source	Status (3) N
Anderson, Michael MichaelAnderson	MichaelAnderson@cobb1.org	Technology Integrator / Specialist	User	Self Registered	Pending Resend
Atkinson, Andrea	AndreaAtkinson@cobb1.org	-	User	Invited	Pending
Brown, Mike	MikeBrown@cobb1.org	-	User	Invited	Pending
Cahoon, Elizabeth	ElizabethCahoon@cobb1.org	-	User	Invited	Pending
Combs, Katelyn	KatelynCombs@cobb1.org	-	User	Invited	Pending
Payton, Erica	EricaPayton@cobb1.org	-	User	Invited	Pending
Manning, Janice	JaniceManning@cobb1.org	-	User	Invited	Pending
Marsh, Marilyn MarilynMarsh	MarilynMarsh@cobb1.org	Other	User	Self Registered	Enabled
Miller, Tucker	TuckerMiller@cobb1.org	-	User	Invited	Pending
Moses, Joseph JosephMoses@cobb1.org	JosephMoses@cobb1.org	Administrator	Admin	Invited	Enabled

Page navigation: 1 of 2

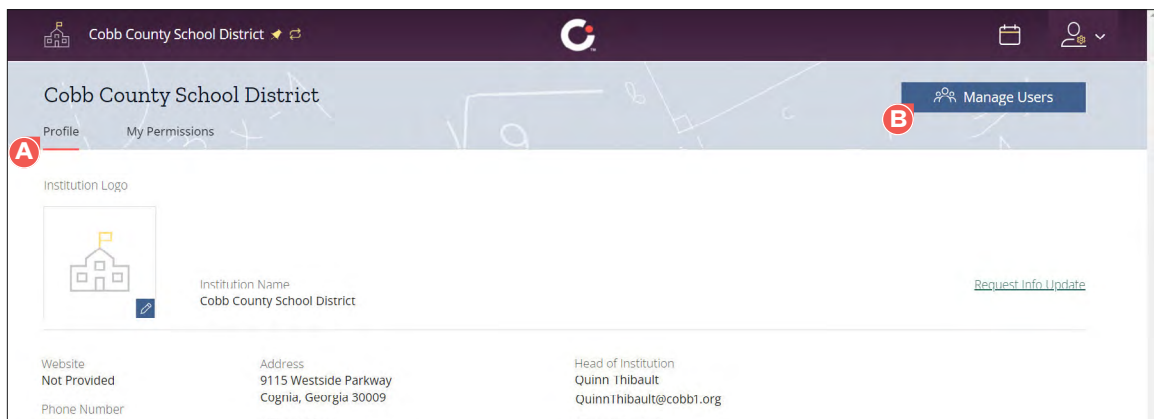
Adding a New User

New users can be added to an institution individually or can be imported in a group. Users who are added individually can be assigned the role of Admin at the time they are invited. Users who are imported are assigned the role of User by default. [Refer to the section titled [Editing a User's Role](#) for more information on editing a user's role.]

Adding New Users Individually

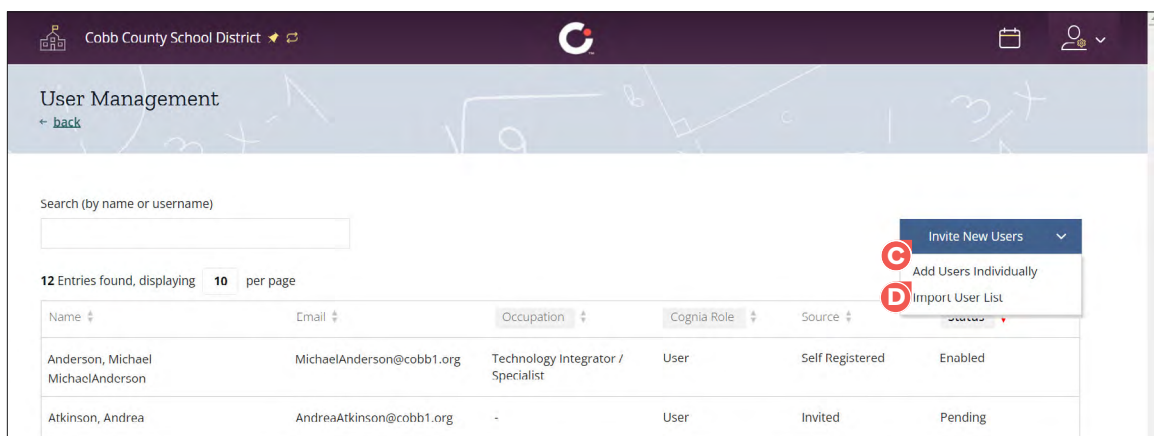
To add individual users to an institution:

1. Open the institution's **Profile** **A**. [Refer to the section titled [Viewing an Institution](#) for more information on how to select an institution.]
2. Click the **Manage Users** **B** button located in the upper right of the page.



The list of users within the institution displays.

3. Select the **Invite New Users** **C** drop-down, and then select **Add Users Individually** **D**.



The Add Users Individually page displays.

4. Enter the user's **First Name** **E**, **Last Name** **F**, and **Email Address** **G**.
5. To add the user as an Admin, select the **Invite as Admin** **H** checkbox. Otherwise, the user will be added with the role of User.
6. (Optional) To add another user, click the **add another user** **I** link. To remove a user, click the **x** **J** icon to the far right of the user.
7. Click **Send Invitations** **K** to invite the user(s) to Cognia Home. (Click **Cancel** **L** if the user(s) no longer need to be added/invited.)

A "Success" message briefly displays across the top of the page confirming the user has been invited, and a Cognia Home email invitation is sent to the user.

Importing a Group of Users

When importing a group of users, the user information template must be used and saved as a .csv file. Users who are imported are assigned the role of User by default.

To import a group of users to an institution:

1. Open the institution's **Profile** **A**. [Refer to the section titled *Viewing an Institution* for more information on how to select an institution.]
2. Click the **Manage Users** **B** button located in the upper right of the page.

The list of users within the institutions displays.

3. Select the **Invite New Users** **C** drop-down, and then select **Import User List** **D**.

The screenshot shows the 'User Management' page for Cobb County School District. At the top, there's a header with the district name and a logo. Below the header, there's a 'User Management' section with a 'back' link. A search bar is present with the text 'Search (by name or username)'. Below the search bar, it says '12 Entries found, displaying 10 per page'. A table lists users with columns: Name, Email, Occupation, Cognia Role, Source, and Status. The table has two rows: Michael Anderson and Andrea Atkinson. A dropdown menu for 'Invite New Users' is open, showing options 'Add Users Individually' and 'Import User List'. The 'Import User List' option is highlighted with a red 'D'.

Name	Email	Occupation	Cognia Role	Source	Status
Anderson, Michael MichaelAnderson	MichaelAnderson@cobb1.org	Technology Integrator / Specialist	User	Self Registered	Enabled
Atkinson, Andrea	AndreaAtkinson@cobb1.org	-	User	Invited	Pending

The Import User List page displays.

4. Click the **download template** **E** link to download the user information template.
5. Populate the template with the required information, and then save the file as a .csv.
6. Click in the **upload space** **F** to select the file to upload, or drag and drop the file to the upload space. (If an error is received, see the section titled File Upload Errors.)

The screenshot shows the 'Import User List' page for Cobb County School District. It has a header with the district name and logo. Below the header, there's a 'Import User List' section with a 'back' link. The main content area has three numbered steps: 1. Download the provided template (with a download icon and a red 'E' icon), 2. Populate your template and save the .csv file (with a description of the template structure), and 3. Attach your completed template (with a description of the upload process). At the bottom, there's a dashed box labeled 'Click here or drag and drop files here to upload.' with a red 'F' icon.

You are returned to the list of users and a “Success” message briefly displays across the top of the page confirming the users have been imported, and a Cognia Home email invitation is sent to the users.

File Upload Errors

CSV: If the file is not a .csv, a message stating the file was rejected and must be a csv file will display.

1 [Download the provided template](#) ↓
Use the provided template to organize your user information

2 **Populate your template and save the .csv file**
The provided template is structured utilizing the following columns:
First Name, Last Name, Email Address

3 **Attach your completed template**
Drag and drop the file into or click in the area below to browse and attach.

Click here or drag and drop files here to upload.

File: 'User Import.xlsx' rejected: Must be a csv file.

To resolve this, open the file, save it as a .csv, and then proceed to import the file.

Errors Found: If the file contains any errors, an Errors Found page will display and shows the number of users that were successfully invited, the number of errors that were found, and a link to download the error file.

To resolve this, click the **Download Error File** ^A link to open the error file. The file contains the original information for the users who failed to import, along with an Error Message column that indicates why that user failed to import. Make the necessary corrections in the error file and save the file as a .csv (the Error Message column does not need to be deleted). Next, click the **Try Again** ^B button, and then proceed to import the file.

Cobb County School District

Import User List

[← back](#)

Errors Found
[2 users](#) have been successfully invited to your institution.
4 errors were found and separated into a downloadable .csv file (with error messages). [Download Error File](#) ↓ ^A

Once the errors have been resolved, use the 'Try Again' button to upload the new file.

[Cancel](#) [Try Again](#) ^B

User Import Error Messages

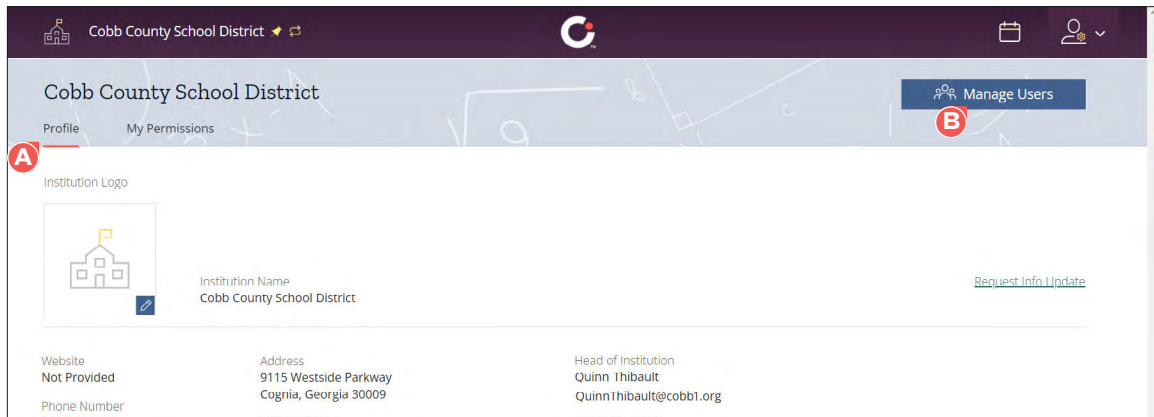
Error Message	Next Steps
Email same as a user already at your institution, Email same as an invitation that's already been sent	Verify the user's email address is correct and is not associated with an existing user account.
Email field is empty	Enter the user's email address in the field.
First Name field is empty	Enter the user's first name in the field.
Last Name field is empty	Enter the user's last name in the field.

Resending a User's Invitation

Whether a user was invited to Cognia Home or self-registered, if the user does not receive the Cognia Home email invitation, they should check their junk/spam folder in their email account. The email invitation can also be resent if the user has a status of *Pending*. Once a user account is enabled, the email invitation cannot be resent.

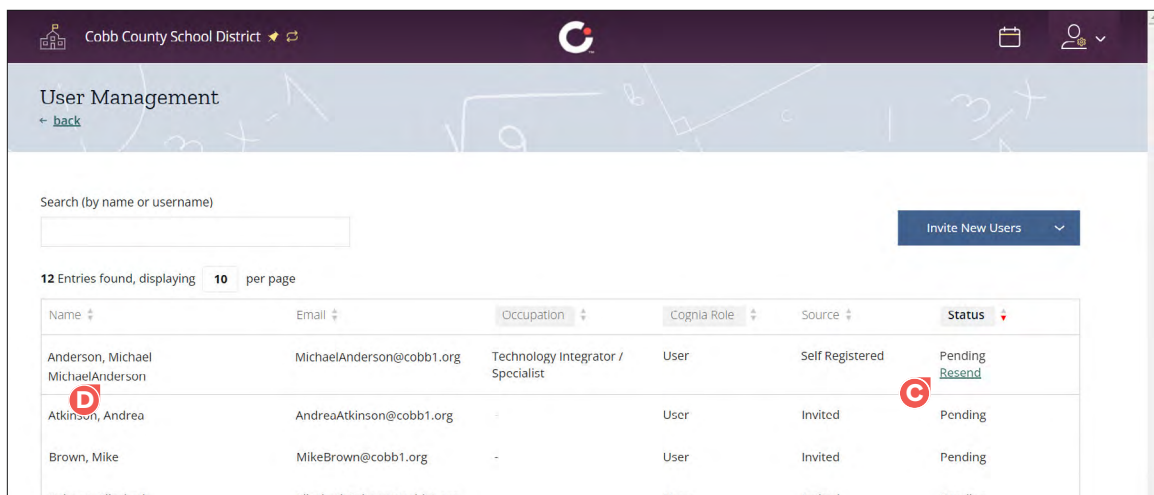
To resend a user's Cognia Home email invitation:

1. Open the institution's **Profile** **A**. [Refer to the section titled [Viewing an Institution](#) for more information on how to select an institution.]
2. Click the **Manage Users** **B** button located in the upper right of the page.



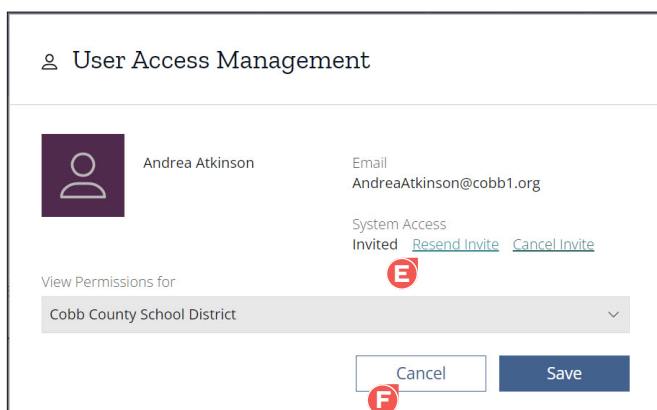
The list of users within the institution displays.

3. Locate the user in the list. If the user self-registered, you can click the **Resend** **C** link in the Status column. Otherwise, click anywhere on their user record **D**.



The User Access Management popup opens and displays the user's information.

4. Click the **Resend Invite** **E** link. (Click **Cancel** **F** if the invite no longer needs to be resent.)



The dialog box is titled "User Access Management". It displays a user profile for "Andrea Atkinson" with email "AndreaAtkinson@cobb1.org". Under "System Access", it shows "Invited" with links for "Resend Invite" (marked with a red 'E') and "Cancel Invite". Below this is a dropdown menu labeled "View Permissions for" currently set to "Cobb County School District". At the bottom are "Cancel" (marked with a red 'F') and "Save" buttons.

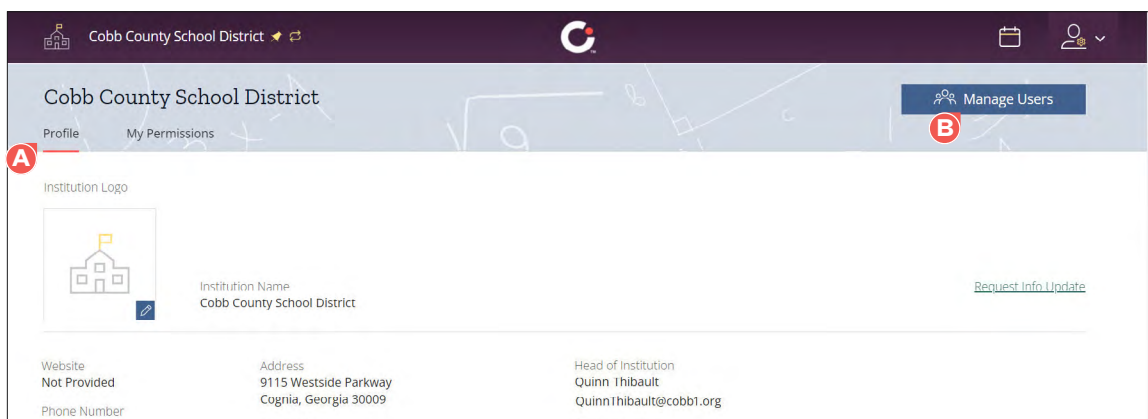
An Information popup opens confirming the email invite has been sent, and the Cognia Home email invitation is sent to the user.

Canceling a User's Invitation

If a user was invited to Cognia Home and they show a status of *Pending*, the Cognia Home email invitation can be canceled if necessary. (The invitation for users who self-registered cannot be canceled.) Once a user account is enabled, the invitation cannot be canceled.

To cancel a user's invitation to Cognia Home:

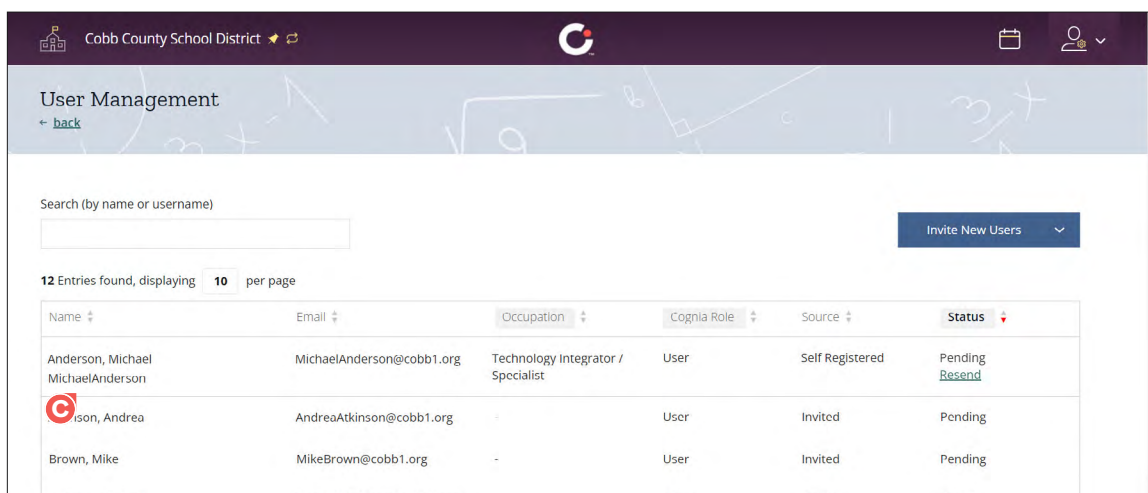
1. Open the institution's **Profile** **A**. [Refer to the section titled *Viewing an Institution* for more information on how to select an institution.]
2. Click the **Manage Users** **B** button located in the upper right of the page.



The page shows the "Cobb County School District" profile. It includes a "Profile" tab (marked with a red 'A') and a "My Permissions" tab. The "Manage Users" button (marked with a red 'B') is in the top right. The profile details include the institution logo, name, address (9115 Westside Parkway, Cognia, Georgia 30009), website (Not Provided), phone number, and head of institution (Quinn Thibault, QuinnThibault@cobb1.org). A "Request Info Update" link is also present.

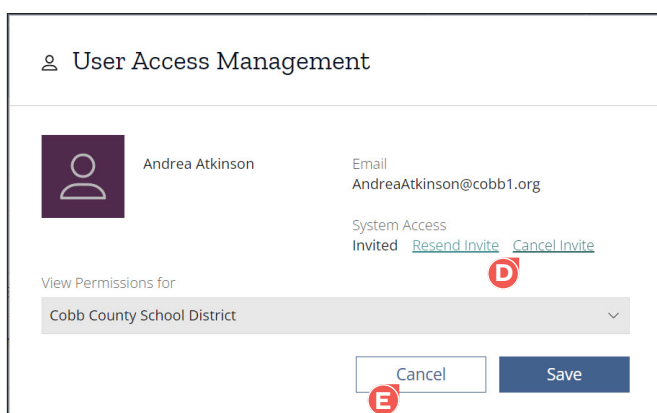
The list of users within the institution displays.

3. Locate the user in the list and click anywhere on their user record **C**.



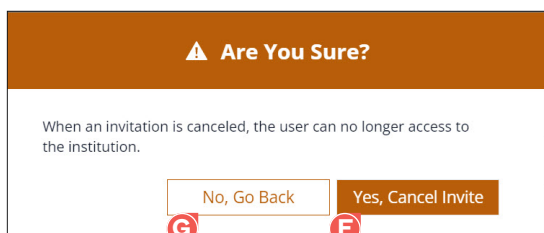
The User Access Management popup opens and displays the user's information.

4. Click the **Cancel Invite** **D** link. (Click the **Cancel** **E** button if the invite no longer needs to be canceled.)



A confirmation popup opens, asking if you are sure that the user's invitation to the institution should be canceled.

5. Click **Yes, Cancel Invite** **F** to cancel the invite. (Click **No, Go Back** **G** if the invite no longer needs to be canceled.)



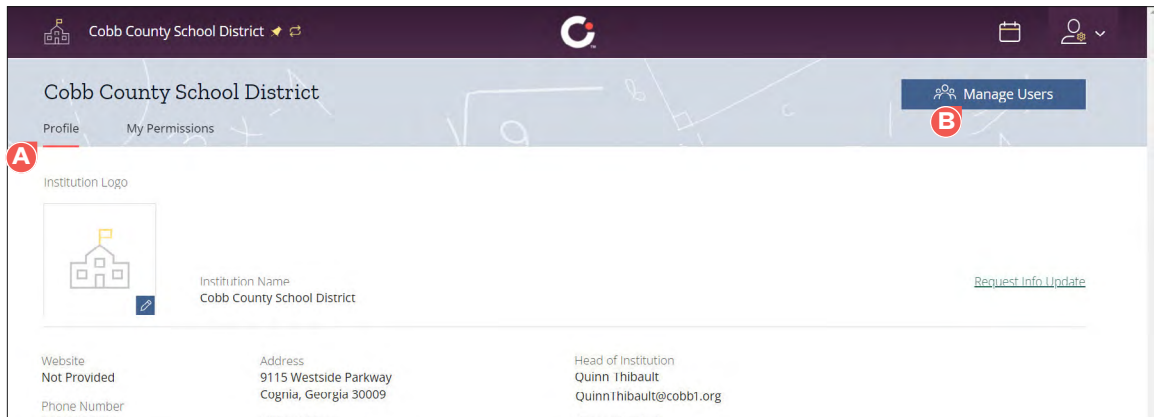
A "Success" message briefly displays across the top of the page confirming the email invite has been canceled. The user is removed from the users list and the invitation link in the email the user was sent is no longer active.

Editing a User's Role

A user's role for Cognia Home and/or the Cognia Learning Community can be edited once their Cognia Home account is enabled. If a user's account status in Cognia Home is *Pending*, their role cannot be edited until they show an account status of *Enabled*.

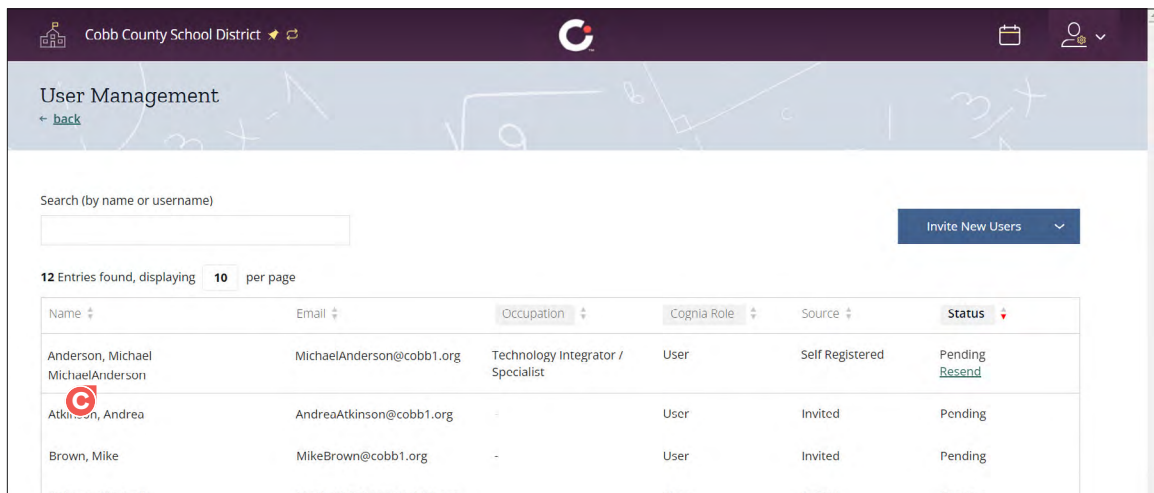
To edit a user's role:

1. Open the institution's **Profile** **A**. [Refer to the section titled [Viewing an Institution](#) for more information on how to select an institution.]
2. Click the **Manage Users** **B** button located in the upper right of the page.



The list of users within the institution displays.

3. Locate the user in the list and click anywhere on that user record **C**.



The User Access Management popup opens and displays the user's account information.

4. To edit the user's role for Cognia Home, select the role from the **Access Level** **D** drop-down. (If the user's Cognia Home account is disabled, the Access Level field is grayed out (inactive).)
5. To edit the user's role for the Cognia Learning Community, select the role from the **Learning Community** **E** drop-down. (If the user's Cognia Home or Learning Community account is disabled, the Learning Community field is grayed out (inactive).)
6. Click **Save** **F**. (Click **Cancel** **G** if changes to the user's role are no longer needed.)

User Access Management

Andrea Atkinson
 Email: AndreaAtkinson@cobb1.org
 System Access: Enabled [Revoke Access](#)

View Permissions for: **Cobb County School District**

Email: AndreaAtkinson@cobb1.org | Source: Invited | Institution Access: **ENABLED**

Access Level: **User** **D**
 Learning Community: **Learner** **E** **ENABLED**

Cancel **Save** **G** **F**

A confirmation popup opens, asking if you are sure the user's role should be changed.

7. Click **Yes, Continue** **H** to save the changes to the user's account. (Click **Cancel** **I** if changes to the user's role are no longer needed.)

Are You Sure?

The following changes will be made:

Learning Community access changed to 'Admin' for Cobb County School District.

No, Cancel **Yes, Continue** **I** **H**

The user's role is updated for the institution.

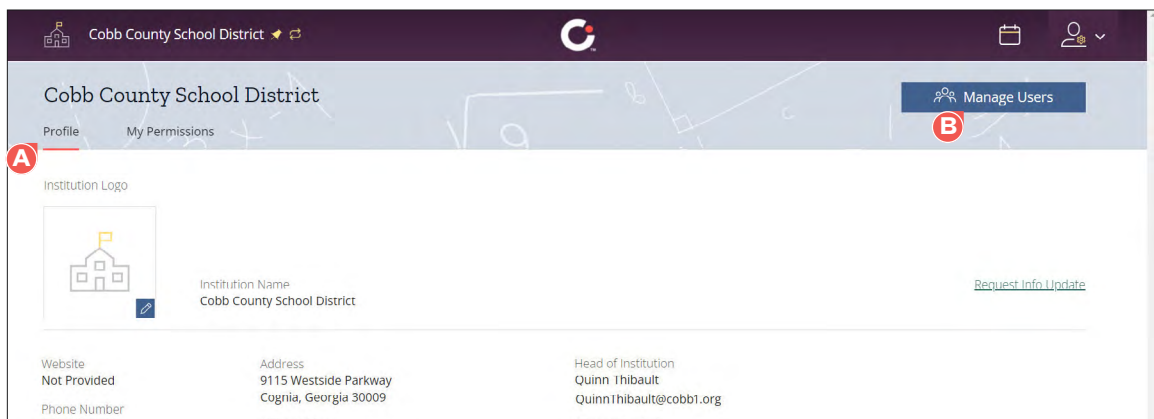
Disabling/Enabling a User's Account

A user's account for Cognia Home or the Cognia Learning Community can be disabled, and subsequently can be enabled. When a user's Cognia Home account is disabled, their Cognia Learning Community is automatically disabled and cannot be enabled unless their Cognia Home account is also enabled.

Note: If a user's account status in Cognia Home is *Pending*, their account cannot be disabled until they have accepted the invitation to join and show an account status of *Enabled*. However, the email invitation for a user who was invited to Cognia Home can be canceled before they have enabled their account. [Refer to the section titled *Canceling a User's Invitation* for more information.]

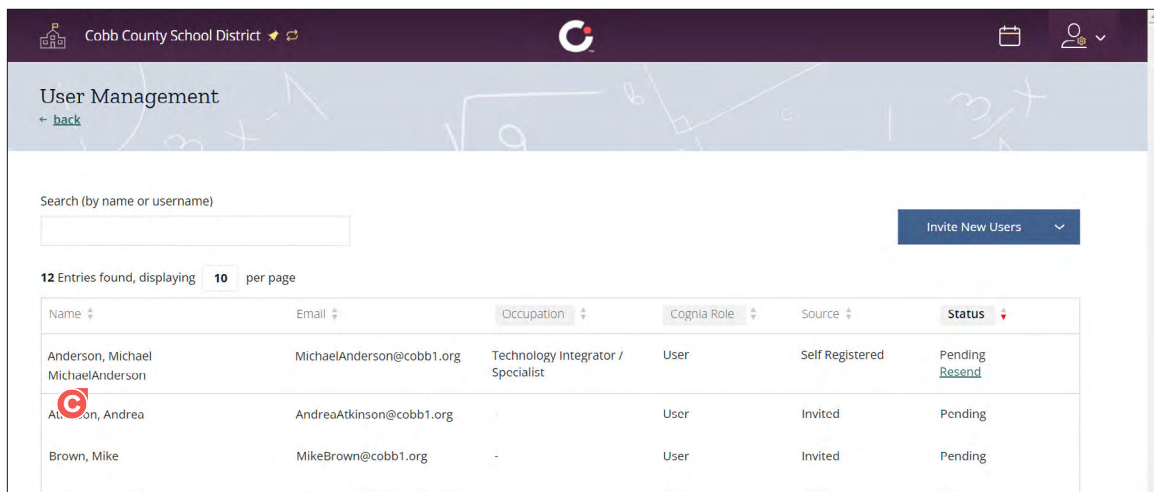
To disable or enable a user's account:

1. Open the institution's **Profile** **A**. [Refer to the section titled *Viewing an Institution* for more information on how to select an institution.]
2. Click the **Manage Users** **B** button located in the upper right of the page.



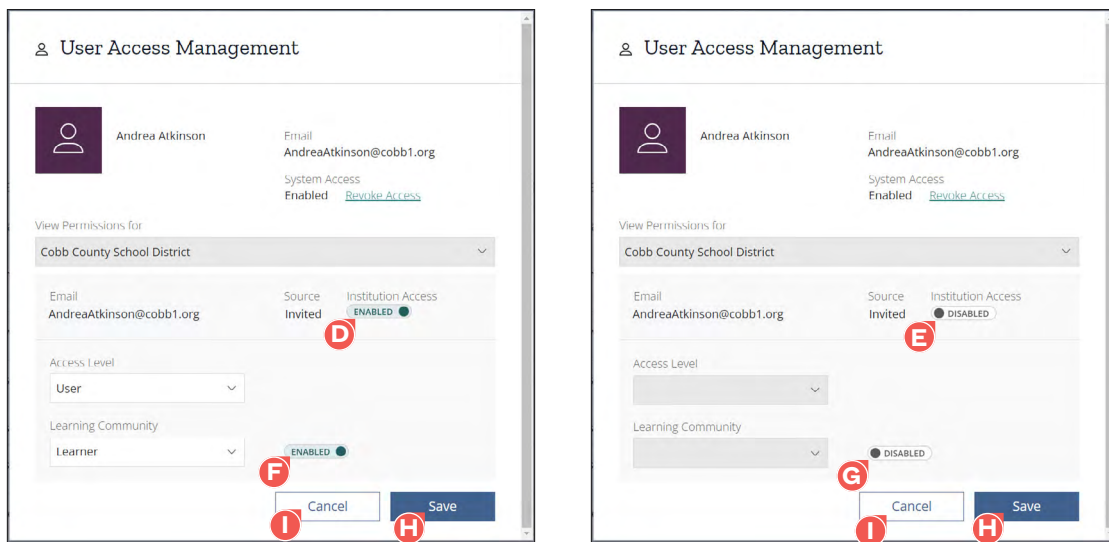
The list of users within the institution displays.

3. Locate the user in the list and click anywhere on that user record **C**.



The User Access Management popup opens and displays the user's information.

4. To disable/enable the user's account for Cognia Home:
 - Select the **Enabled** **D** button located under Institution Access to disable the account.
 - Note:** This automatically disables the user's Cognia Learning Community account.
 - Select the **Disabled** **E** button located under Institution Access to enable the account.
5. To disable/enable the user's account for the Cognia Learning Community:
 - Select the **Enabled** **F** button located to the right of their Learning Community role to disable the account.
 - Select the **Disabled** **G** button located to the right of their Learning Community role to enable the account.
 - Note:** If the user's Cognia Home account is disabled, the Enabled button is grayed out (inactive). The user's Cognia Learning Community cannot be enabled unless their Cognia Home account is enabled.
6. Click **Save** **H** to save the changes to the user's account. (Click **Cancel** **I** if the user's account no longer needs to be disabled/enabled.)



The user's account is disabled/enabled for the institution in Cognia Home/Learning Community.



cognia.org