

User Management Guide

Account Owners and Administrators

Cognia Improvement Platform

Overview

Cognia® Improvement Platform 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. It includes tools for administrators to manage users and institutional profiles to facilitate a complete and engaging experience with Cognia's products and services.

This guide provides instructions for Account Owners and Admins managing users across the platform. For assistance with how to use the tools found in the platform, refer to the tool-specific user guides.

User Roles & Account Access

Account Management Roles

Learning Community Roles

Improvement Platform Roles

Accessing Users

Adding New Users Individually

Importing New Users

Resending a User's Email Invitation

Changing a User's Institution

Changing a User's Role

Disabling a User Account

Removing a User from an Institution

User Roles & Account Access

Account Management Roles

Account Management recognizes three user roles: **Account Owner**, **Admin**, and **User**. Each role has a separate set of permissions, which determines the user's access to user management and home pages.

- **Account Owners** are responsible for onboarding the institution, and inviting and managing other users for their institution. Account Owner is a role automatically assigned by Cognia to the Head of Institution and Primary Contact.
- **Admins** can also perform user management tasks.
- **Users** can access their home page and permitted tools, and manage their own profile.

Learning Community Roles

The Cognia Learning Community recognizes two user roles: **Manager** and **Learner**. Each role has a separate set of permissions, which determines the user's access to the components available within the Learning Community.

- **Managers** are responsible for assigning training to users in their institution and can view reporting. Manager is a role automatically assigned by Cognia to the Head of Institution and Primary Contact.
- **Learners** can access and complete the training labs assigned to them by their manager.

Improvement Platform Roles

The Cognia Improvement Platform recognizes various roles that are utilized across all tools, with specific functions within each tool the role has access to. Table 1 outlines how the roles are applied.

- **Network Admin** is a user at a system or district level with access to see and interact with data across their organizational hierarchy (institutions within network).
- **Institution Admin** is a user at the system, district, or school level who is an Admin for only that institution itself. Institution Admin is a role automatically assigned by Cognia to the Head of Institution and Primary Contact.
- **Observer** is a role automatically assigned by Cognia to the Head of Institution and Primary Contact.

Table 1: Improvement Platform User Roles & Access

Role Name	Description
Institution Admin	<p>Surveys: Can view the Survey Library and preview surveys. Can create survey administrations. Can view, edit, archive, and delete all user survey administrations. Can generate and export survey data reports for all survey administrations.</p> <p>Strategies: Can view all user's plans. Can start, edit, complete, finalize, and archive plans. Can view and create evidence records in the Evidence Library.</p> <p>Observations: Can view, create, and archive courses. Can view submitted, archive, and unarchive/undelete all user observations. Can download observation reports. Cannot create observations unless they also have the Observer role assigned.</p> <p>Candidacy/Engagement Reviews: Can view, complete, and submit institution sections for a review.</p>
Network Admin Multi-Network Admin	<p>Surveys: Can view the Survey Library and preview surveys. Can view survey administrations. Can generate survey data reports created by institutions within network. Cannot archive or delete survey administrations created by institutions.</p> <p>Strategies: Can view plans created by institutions within network. Can view evidence records created by institutions. Cannot edit or delete plans or evidence.</p> <p>Observations: Can generate aggregate reports of observations completed at institutions within network. Can create courses and classrooms for institutions within network. Cannot create observations unless they also have the Observer role assigned.</p> <p>Candidacy/Engagement Reviews: Can view, complete, and submit institution sections for reviews for institutions within network.</p>
Contributor	<p>Surveys: Can view the Survey Library and preview surveys. Can create survey administrations. Can view and edit all user survey administrations. Can generate and export survey data reports for all survey administrations. Cannot archive or delete survey administrations.</p>

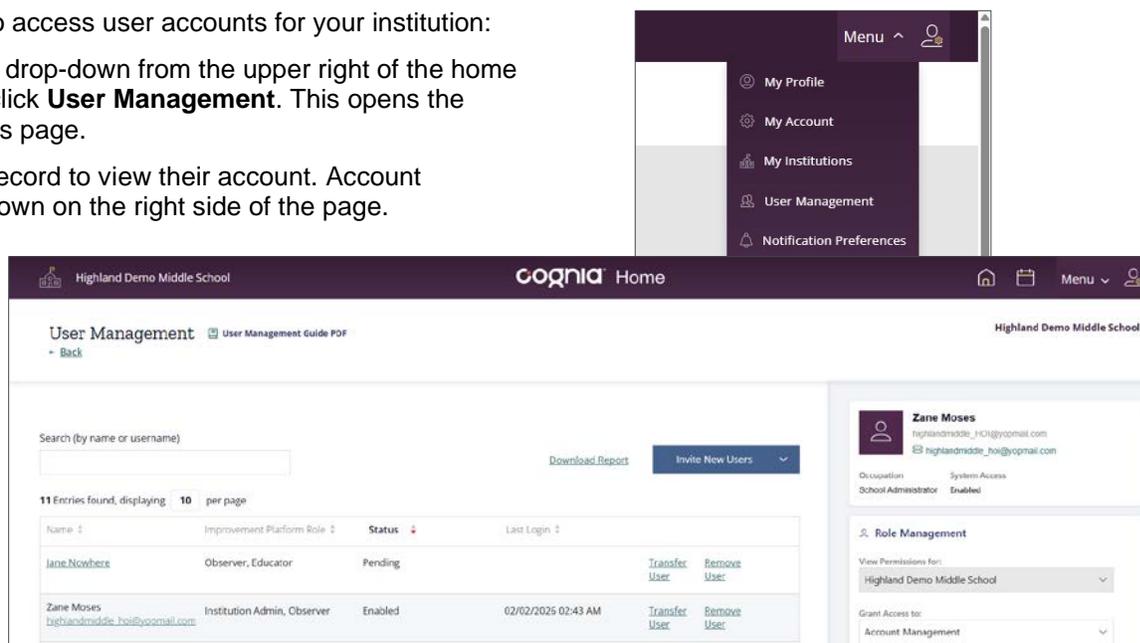
Role Name	Description
	<p>Strategies: Can view and edit existing plans. Can view and create evidence records in the Evidence Library. Cannot create new plans or manage tags.</p> <p>Observations: Can view submitted observations and generate reports. Cannot create observations unless they also have the Observer role assigned.</p> <p>Candidacy/Engagement Reviews: Can view reviews and complete and submit institution sections.</p>
Viewer	<p>Surveys: Can view the Survey Library and preview surveys. Can view survey data reports for all survey administrations. Cannot create, edit, archive, or delete survey administrations.</p> <p>Strategies: Can only view existing plans.</p> <p>Observations: Can only view generated reports.</p> <p>Candidacy/Engagement Reviews: Can view institution sections for a review.</p>
Observer	<p>Observations: Can conduct (start, edit, submit, and delete) and view their own observations. Can download observation reports for their own observations.</p>
Educator	<p>Observations: No active platform use, unless they also have another role assigned.</p>

Accessing Users

Single Institution — Account Owners and Institution Admins of an individual/standalone institution can access users for their institution only.

Follow these steps to access user accounts for your institution:

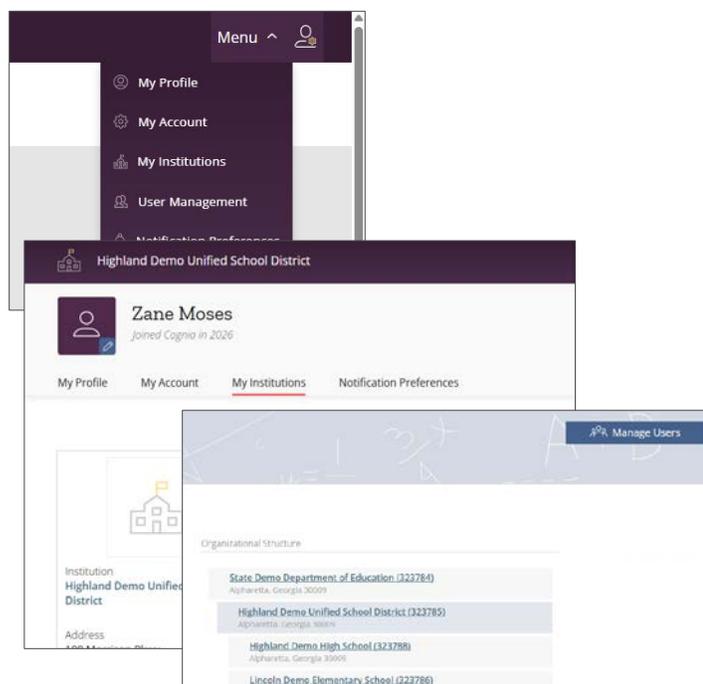
1. Select the **Menu** drop-down from the upper right of the home page, and then click **User Management**. This opens the institution's user's page.
2. Click on a user record to view their account. Account information is shown on the right side of the page.



Multiple or System/District Institutions — Account Owners and Network Admins of multiple institutions or of a system/district institution can access users for their institution and all institutions under the hierarchy.

Follow these steps to access user accounts for an institution:

1. Select the **Menu** drop-down from the upper right of the home page, and then click **My Institutions**. This opens your institutions.
2. Click the **institution name** you want to access.
3. For a system/district institution, select the **institution** from the organization structure.
4. Click the **Manage Users** button at the upper right of the page. This opens the institution's user's page.
5. Click on a user record to view their account. Account information is shown on the right side of the page.



Adding New Users Individually

New users can be added to an institution individually, or bulk import can be used to add a group of new users to an institution. For bulk import, refer to the section [Importing New Users](#).

Follow these steps to add a new user individually:

1. Open the institution's user's page.
2. Select the **Invite New Users** drop-down, and then click **Add Users Individually**. This opens an Add Users Individually page.
3. Enter the user's **First Name, Last Name, and Email**.
4. For Improvement Platform users, select the role to assign the user from the **User Roles** drop-down (multiple can be selected).
5. Select the **Invite as Admin** checkbox only if the user should be added to Account Management as an Admin and to the Learning Community as a Manager. Otherwise, they will be added to Account Management as a User and to the Learning Community as a Learner.
6. Click the **add another user** link if you want to add another new user.
7. Click the **Send Invitations** button when you are done entering new user information.

This adds the user as Pending, and they are sent an email invitation with a link to accept their invitation and create their account. For all Improvement Platform users, the user *must* accept their invitation to be given access to the tools.

The screenshot displays the Cognia User Management interface for Highland Demo Middle School. The top navigation bar includes the school name and the Cognia Home logo. The main heading is 'User Management' with a 'User Management Guide PDF' link and a 'Back' link. A search bar is present with the placeholder 'Search (by name or username)'. A 'Download Report' link is visible. A dropdown menu is open, showing options: 'Invite New Users', 'Add Users Individually', and 'Import User List'. Below the menu, a table lists user entries. The first entry is for 'Zane Moses' with email 'zjstandmiddle.holl@goosmail.com', role 'Institution Admin, Observer, Educator', and status 'Enabled'. Action links 'Transfer User' and 'Remove User' are shown for this entry. Below the table, the 'Add Users Individually' form is displayed, featuring input fields for 'First Name', 'Last Name', and 'Email', a 'User Roles' dropdown menu set to 'Select user roles', and an 'Invite as Admin' checkbox. A '+ add another user:' link is located below the form. At the bottom of the form are 'Cancel' and 'Send Invitations' buttons.

Importing New Users

Bulk import can be used to add a group of new users to an institution, or new users can be added to an institution individually. For individual users, refer to the section [Adding New Users Individually](#).

Follow these steps to import a group of users:

1. Open the institution's user's page.
2. Select the **Invite New Users** drop-down, and then click **Import User List**. This opens the Import User List page.
3. Click the link to **Download the provided template**.
4. Populate the template* and save it as a .csv file.
5. On the Import User List page, click in the **upload** space to select the file or drag and drop the file to the space.

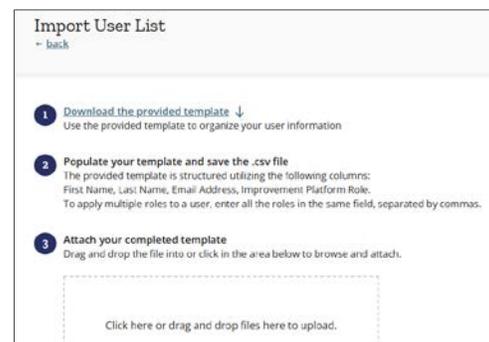
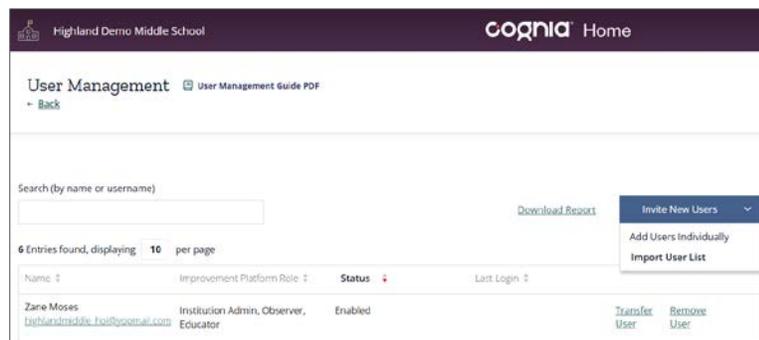
This adds the users** as Pending, and they are sent an email invitation with a link to accept their invitation and create their account. For all Improvement Platform users, the user *must* accept their invitation to be given access to the tools.

Errors: If the file contains any errors, an error file will automatically be generated. Open the error file and make the required corrections to the user information. Save it as a .csv file and upload it.

* For Improvement Platform users, the template includes a column to specify the user's Improvement Platform Role.

- Roles: Institution Admin, Network Admin, Multi-Network Admin, Observer, Educator, Contributor, Viewer
- If the user requires multiple roles, each role can be entered but must be separated with a comma —
For example: Institution Admin, Observer

** All users are added to Account Management as a User and to the Learning Community as a Learner. For any user who requires Admin (Account Management) or Manager (Learning Community) access, their roles can be edited after they are imported.



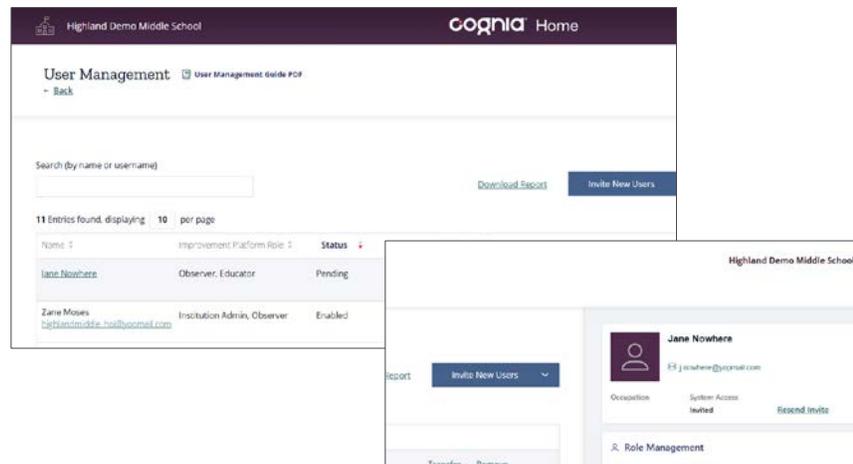
Resending a User's Email Invitation

If a user still in a Pending status does not receive or cannot find the automated email invitation they were sent when they were added to an institution, their invitation can be re-sent.

Follow these steps to resend a user's email invitation:

1. Open the institution's user's page.
2. Find the Pending user and click on their name to view their account.
3. Click the **Resend Invite** link at the right of the user's account information.

This resends the user's email invitation.



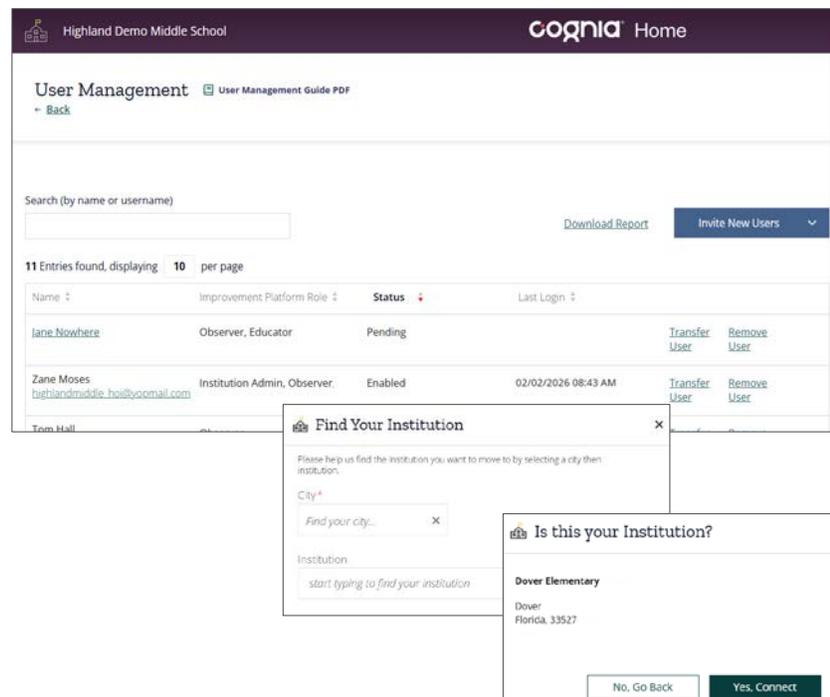
Changing a User's Institution

If a user moves to a different institution, they can be transferred to their new institution in the Improvement Platform.

Follow these steps to transfer a user from your institution:

1. Open the institution's user's page.
2. Find the user and click the **Transfer User** link to the far right. This opens an **Institution** search box.
3. Select the institution's **City**, and then **Institution name**. This opens a confirmation box.
4. Verify the correct institution is displayed.
5. Click the **Yes, Connect** button if the institution is correct. If it is not correct, click the **No, Go Back** button, and then select the correct institution.

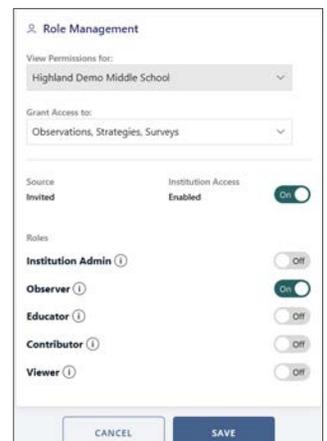
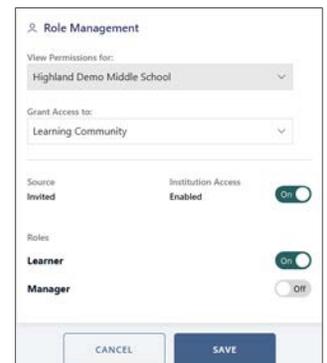
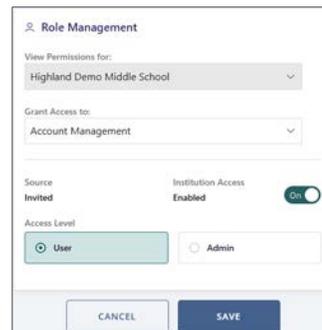
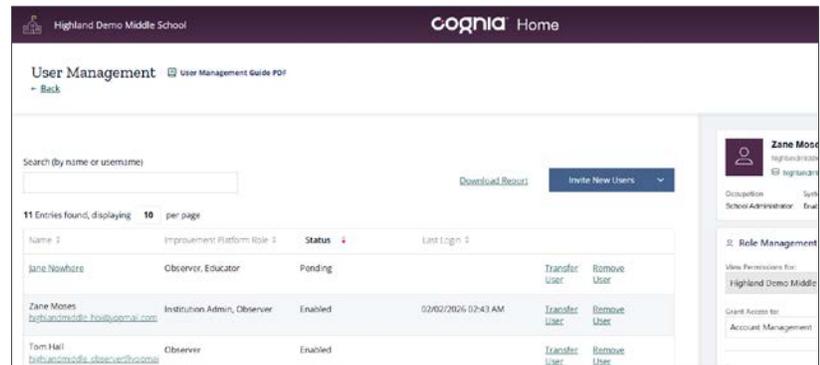
This removes the user from your institution and adds them to their new institution.



Changing a User's Role

Follow these steps to change a user's role:

1. Open the institution's user's page.
2. Find the user and click on their name to view their account.
3. **For Account Management —**
 - a. Select **Account Management** from the **Grant Access to** drop-down.
 - b. Select the role the user should have.
 - c. Click the **Save** button.
This changes the user's role.
4. **For Learning Community —**
 - a. Select **Learning Community** from the **Grant Access to** drop-down.
 - b. Select the role the user should have by setting it to **On** or **Off**.
 - c. Click the **Save** button.
This changes the user's role.
5. **For Improvement Tools —**
 - a. Select **Observations, Strategies, Surveys** from the **Grant Access to** drop-down.
 - b. Select the role the user should have by setting it to **On** or **Off** (multiple can be On).
 - c. Click the **Save** button.
This changes the user's role.

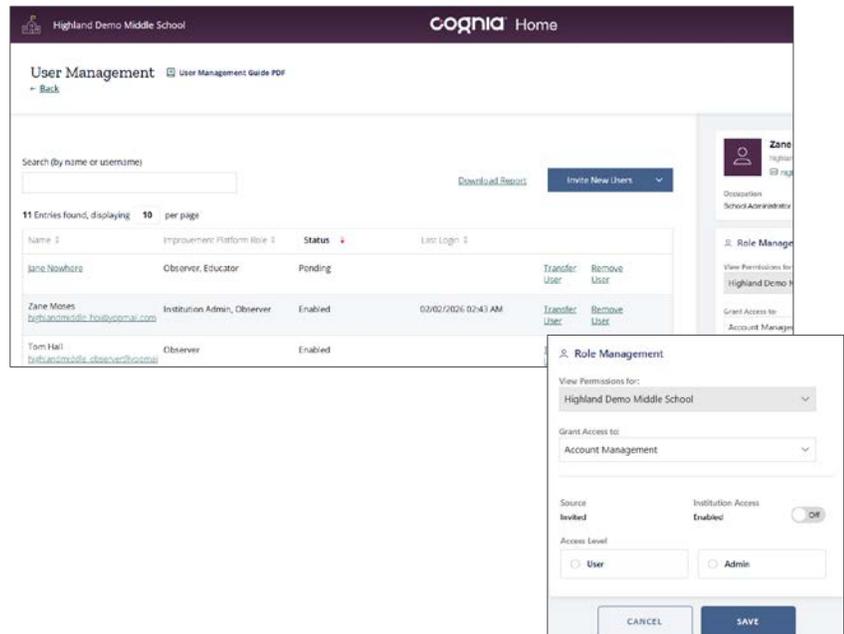


Disabling a User Account

Follow these steps to disable a user's account access:

1. Open the institution's user's page.
2. Find the user and click on their name to view their account.
3. Click the **Enabled** On status to set it to **Off**.
4. Click the **Save** button.

This changes the user's status to Disabled.



The screenshot shows the 'User Management' page for 'Highland Demo Middle School'. A table lists users with columns for Name, Improvement Platform Role, Status, and Last Login. The user 'Zane Moses' is highlighted, and a 'Role Management' modal is open. In the modal, the 'Institution Access' toggle is set to 'Off'.

Name	Improvement Platform Role	Status	Last Login
Jane Nowhere	Observer, Educator	Pending	
Zane Moses highlandmiddle_hs@yopmail.com	Institution Admin, Observer	Enabled	02/02/2026 02:43 AM
Tom Hall highlandmiddle_obs@verfho.com	Observer	Enabled	

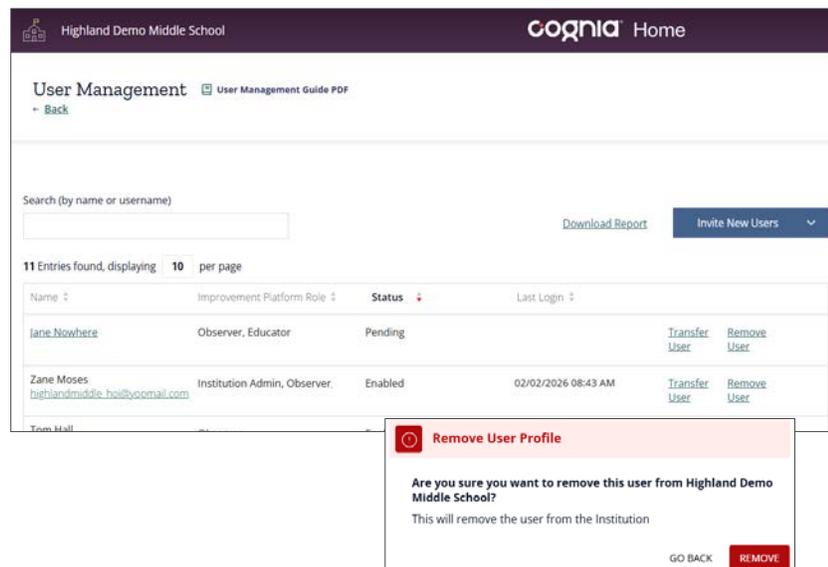
Removing a User from an Institution

If a user should no longer be assigned to an institution, their account should be removed from the institution.

Follow these steps to remove a user from an institution:

1. Open the institution's user's page.
2. Find the user and click the **Remove User** link to the far right. This opens a confirmation box.
3. Click the **Remove** button to confirm.

This removes the user from the institution.



The screenshot shows the 'User Management' page for 'Highland Demo Middle School'. A table lists users with columns for Name, Improvement Platform Role, Status, and Last Login. The user 'Zane Moses' is highlighted, and a 'Remove User Profile' modal is open. The modal asks for confirmation to remove the user from the institution.

Name	Improvement Platform Role	Status	Last Login
Jane Nowhere	Observer, Educator	Pending	
Zane Moses highlandmiddle_hs@yopmail.com	Institution Admin, Observer	Enabled	02/02/2026 08:43 AM
Tom Hall			