



# User Data Management

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User Guide



COGNIA ASSESSMENTS

# Table of Contents

<b>Introduction .....</b>	<b>1</b>
Purpose.....	1
Support.....	1
Browser Requirements .....	1
<b>Accessing Cognia Assessments.....</b>	<b>2</b>
User Roles and Permissions.....	2
<b>User Data Management .....</b>	<b>4</b>
Completing the initial upload of users .....	4
Adding a New User .....	4
Viewing the User List.....	8
Viewing and Editing a User’s Account Information .....	10
Viewing and Editing a User’s Classes .....	12
Deleting a User .....	15
<b>Data Uploads.....</b>	<b>16</b>
Data Submission Process .....	16
Data Templates .....	16

# Introduction

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## Purpose

This document is intended for system, district, or school administrators responsible for creating and managing users (this includes students, teachers, and administrators) in the Cognia™ Assessments online assessment platform for the administration of online Cognia Formative Assessments.

This document covers user roles and permissions, the initial user rostering process, and creating and managing users in the online assessment platform. (Teachers do not have access to these functions.)

**Note:** The online assessment platform supports users of many types (e.g., students, teachers, and administrators). Users in the platform are distinguished by the role (student, teacher, or administrator) they are assigned. The process for creating and managing users of all types is the same process for all users.

## Support

All user guides and supporting documents are available on the [Formative Resources](#) tab of the Vermont Help and Support website.

Cognia Client Care representatives are available to answer any questions about the Cognia Assessments online assessment platform and student test delivery system. Please use the email and phone numbers listed below to contact Cognia Client Care for support.

**Email:** [vtservicecenter@cognia.org](mailto:vtservicecenter@cognia.org)

**Phone:** (800) 215-8975

## Browser Requirements

Users may access the online assessment platform at any time during administration. The online assessment platform is accessible to institutional users on desktops and laptops via the following browsers:

- Chrome™ 92 or newer
- Firefox® 89 or newer
- Safari® 14 or newer

# Accessing Cognia Assessments

## User Roles and Permissions

Cognia Assessments recognizes four user roles: District Administrator or System Administrator, School Administrator, Teacher, and Student. Each role has a separate set of permissions, which determine the user's level of access to the components available within the online testing platform. Roles are also associated with institutions (districts, systems, or schools), which provide access to specific institutional data. See Table 1 for details on the user roles and permissions.

District administrators will have access to all schools within their district. School administrators will have access to all users and classes within their school. Teachers have access to their class. Administrators and teachers can be assigned to multiple institutions but can only be assigned a single role, which applies to all their assigned institutions. If an administrator or teacher requires multiple roles, they must have a separate user account for each role.

**Table 1: User Roles and Permissions**

Function	District/System Administrator	School Administrator	Teacher	Student
<b>User Management</b>				
Create, Edit, and Delete Users	✓	✓		
<b>Course/Class Management</b>				
Create, Edit, and Delete Courses				
Create, Edit, and Delete Classes	✓	✓		
<b>Test Management</b>				
Create, Edit, and Delete Test Administrations	✓	✓		
Create Tests			✓	
Schedule Tests			✓	
<b>Proctoring</b>				
Print Student Logins	✓	✓	✓	
Pause/Resume Sessions	✓	✓	✓	
Open Section 2 in a Session	✓	✓	✓	
Submit/Unsubmit a Student's Test	✓	✓	✓	

Reseat a Student's Session	✓	✓	✓	
<b>Scoring</b>				
Score Open Response Items			✓	
<b>Reports</b>				
View Reports	✓	✓	✓	
<b>Student Test Delivery System</b>				
Log In				✓
Take an Online Assessment				✓

# User Data Management

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Users identify the system, district, and school personnel who are supporting the administration of an online formative assessment and the students who are taking an online assessment. Users are created manually in the online assessment platform; or if you have a group of users to be created and you would like created in bulk, the data can be uploaded to the online platform.

## Completing the initial upload of users

To add users to the system, you will complete a Users upload.

1. Download the Users template from the [Formative Resources](#) tab of the Vermont Help and Support website. This file will have a template for you to complete, along with a tab that explains each field and the required values.
2. Complete the file with all teachers and school administrators as needed.
3. Navigate to the Roster Uploads page in the left-hand navigation bar (Rostering > Roster Uploads).




To add students to the system, you will complete a Users (Students) upload.

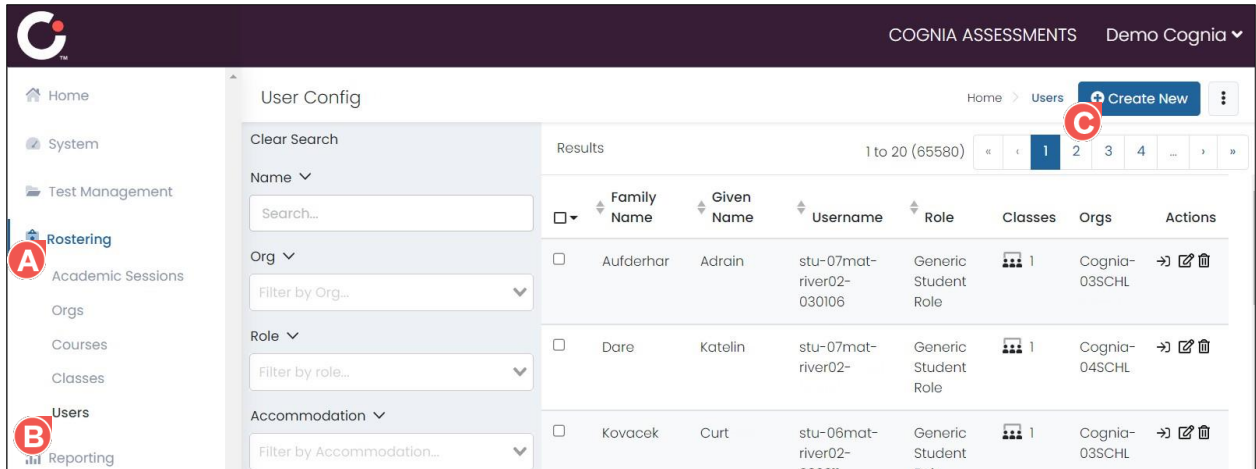
1. Download the Users (Students) template from the [Formative Resources](#) tab of the Vermont Help and Support website. This file will have a template for you to complete, along with a tab that explains each field and the required values.
2. Complete the file with all students as needed.
3. Navigate to the Roster Uploads page in the left-hand navigation bar (Rostering > Roster Uploads).

See the [Data Uploads](#) section for more information on completing the initial upload of users.

## Adding a New User

To add a new user:

1. Select the **Rostering**  menu located on the left side of the page, and then select **Users** . This opens the User Config page. By default, the User Config page displays the list of users in your institution.
2. Click the **Create New**  button located in the upper right of the page. This opens a new User Setup page.



3. Enter the user's given or first name in the **Given Name** **D** field.
4. Enter the user's family or last name in the **Family Name** **E** field.



5. Select the user's role from the **Role** **F** drop-down. (You can only create users with the equivalent of your role and lower. You cannot create users with a role that is higher than your own.)
6. For a "student" role, enter their student ID in the **Identifier** **G** field. For a non-student role, enter the user's employee ID in this field.
7. Applicable only to the "student" role; otherwise, disregard this field: Select the student's grade from the **Grades** **H** drop-down.

**Note:** To remove a selected grade, click the **x** **I** icon located beside it.

8. Select the user's institution from the **Org Scopes** **J** drop-down. (Multiple institutions can be selected.)

**Tip:** To search for an institution, begin entering the institution name in the **Org Scopes** **J** field, and then select the institution from the drop-down. (As you type, the drop-down automatically updates to display only the institutions that match the entered criteria.)

**Note:** To remove a selected institution, click the **x** **K** icon located beside it.

9. If your institution has a Student Information System (SIS), users in the SIS should include a sourced ID. Enter this sourced ID in the **Sourced ID** **L** field. If your institution does not have an SIS, enter the student or employee ID in this field.

10. Enter a username for the user in the **Username** **M** field. All users must have a unique username. This could be their student or employee ID, their email address, their username from your SIS, or some other value that you can provide.
11. (Optional) Enter the user's email address in the **User Email** **N** field.

The screenshot shows the 'User Setup' form with the following fields and callouts:

- Role**: A dropdown menu with callout **F**.
- Identifier**: A text input field with 'User Identifier' and a callout **G** pointing to the placeholder text 'Client defined Identifier for user.'
- Grades**: A dropdown menu with '03' and a callout **H**.
- Org Scopes**: A dropdown menu with 'Cognia Training District' and a callout **J**.
- Sourced ID**: A text input field with 'User Sourced ID' and a callout **L**.
- Username**: A text input field with 'Username' and a callout **M**.
- User Email**: A text input field with 'User Email' and a callout **N**.

12. To set a password for the user, select the **Set Password** **O** button; otherwise, the user will be sent a system-generated email with information on how to set their password once their account is created. Passwords must contain between 8 and 16 characters, at least 1 lowercase character, at least 1 uppercase character, and at least 1 digit.
  - a. Enter YOUR password in the **Logged in User's Current Password** **P** field.
  - b. Enter a password for the user in the **New Password** **Q** field.
  - c. Re-enter the password in the **Confirm Password** **R** field.
13. Leave the **User Enabled** **S** checkbox selected.
14. Once you have completed making all selections, click the **Save** **T** button located in the lower right of the page to finish creating the user. (If the user no longer needs to be created, click the **Cancel** **U** or **Back to Users** **V** button, and then click **Discard Changes** **W** in the Unsaved Information popup.)



User Setup Home > Users > Edit

Set Password ^

Logged In User's Current Password

New Password

Confirm Password

User Enabled

Users that are not enabled are not able to login.

CancelSaveBack to Users

### Unsaved Information

You have unsaved changes, are you sure you want to exit?

CancelDiscard ChangesSave

The user is added, and you are returned to the User Config page. If you did not enter a password for the user but you entered their email address, they are sent a system-generated email with information on how to set their password.

# Viewing the User List

To view the list of users assigned to your institution:

1. Select the **Rostering** **A** menu located on the left side of the page, and then select **Users** **B**. This opens the User Config page. By default, the User Config page displays the list of users in your institution. The following columns are displayed for each user:
  - **Family Name** **C**: The user's last or family name.
  - **Given Name** **D**: The user's first or given name.
  - **Username** **E**: The unique identifier for the user.
  - **Role** **F**: The user's assigned role.
  - **Classes** **G**: The number of classes the user is assigned to. This is only applicable to users with the "student" or "teacher" role.

**Tip:** You can hover over the number of classes to view a tooltip with the class name(s).

  - **Orgs** **H**: The user's assigned institution(s).
  - **Actions** **I**: The available actions for the user.

**Tip:** You can sort the list by any of the following columns by selecting the column name and can reverse sort the list by selecting the column a second time: **Family Name**, **Given Name**, **Username**, or **Role**.

The screenshot shows the 'User Config' interface. On the left is a navigation menu with 'Rostering' highlighted (marked with 'A') and 'Users' selected (marked with 'B'). The main area displays a table of users with columns: Family Name (marked 'C'), Given Name (marked 'D'), Username (marked 'E'), Role (marked 'F'), Classes (marked 'G'), Orgs (marked 'H'), and Actions (marked 'I'). The table lists three users: Aufderhar, Adrain; Dare, Katelin; and Kovacek, Curt. The interface includes a search bar, filters for Org and Role, and a table with 1 to 20 results.

Family Name	Given Name	Username	Role	Classes	Orgs	Actions
Aufderhar	Adrain	stu-07mat-river02-030106	Generic Student Role	1	Cognia-03SCHL	[Actions]
Dare	Katelin	stu-07mat-river02-	Generic Student Role	1	Cognia-04SCHL	[Actions]
Kovacek	Curt	stu-08mat-river02-	Generic Student	1	Cognia-03SCHL	[Actions]

2. When viewing the User page:

- a. Click the **page navigation arrows** **J** and/or **page numbers** **K** located in the upper right of the page to navigate between the different pages of users.
- b. To search the list by a user's name, begin entering their name in the **Name Search** **L** field, and then select the name from the drop-down. (As you type, the list automatically updates to display only the users that match the entered criteria.)
- c. Applicable only to users with access to multiple institutions: To filter the list of classes by school, select a school from the **Org** **M** drop-down. This updates the list to display only the users assigned to that school.
- d. Applicable only to users with access to multiple institutions: If the list is filtered by school, a **Class** **N** field displays. To filter the list of users by class, select a class from the **Class** **N** drop-down. This updates the list to display only the users assigned to that class.
- e. To filter the list by role, select a role from the **Role** **O** drop-down. This updates the list to display only the users assigned that role.
- f. To filter the list by assigned accommodations, select one or more accommodations from the **Accommodation** **P** drop-down. This updates the list to display only the users assigned those accommodations.
- g. To display only the users who are not assigned to any class, select the **Show Unrostered** **Q** checkbox. This updates the list to display only the users with a "student" role who are not assigned to any class.
- h. Click the **x** **R** icon located to the right of a field selection to remove the selected option or click **Clear Search** **S** located above the list of search fields to remove all selected options.

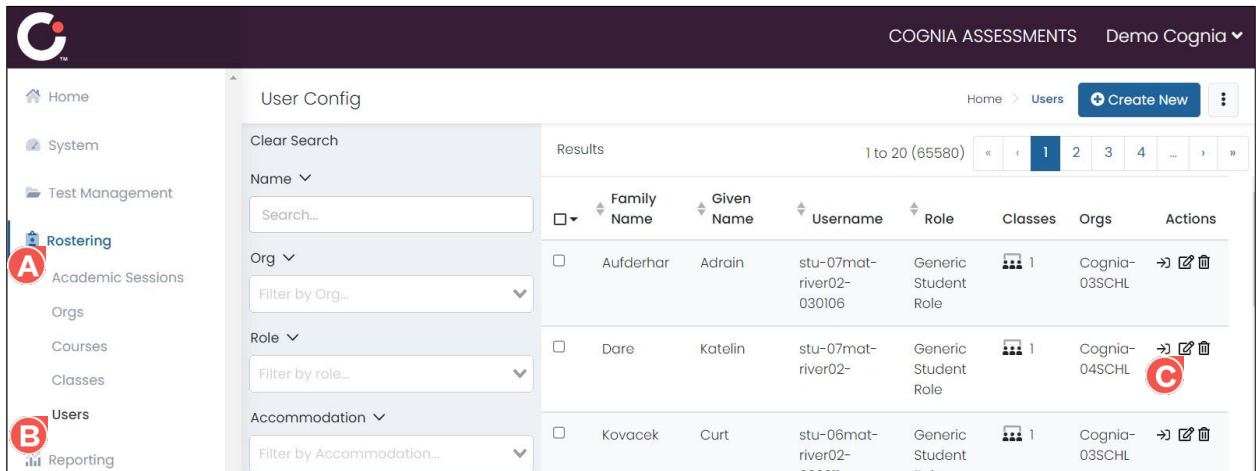
The screenshot shows the 'User Config (1)' interface. On the left is a navigation sidebar with categories like Home, System, Test Management, Rostering, Reporting, and Authoring. The main area is divided into a search/filter panel on the left and a results table on the right. The search panel includes fields for Name (L), Org (M), Class (N), Role (O), Accommodation (P), and a 'Show Unrostered' (Q) checkbox. A 'Clear Search' (S) button is at the top of the search panel. The results table has columns for Family Name, Given Name, Username, Role, Classes, Orgs, and Actions. The table shows five users: Aufderhar, Dare, Kovacek, Lubowitz, and Mills. Callout letters J, K, and L point to the page navigation arrows and numbers in the top right of the results table. Callout letter R points to the 'x' icon in the Org filter dropdown. Callout letter M points to the Org dropdown menu. Callout letter N points to the Class dropdown menu. Callout letter O points to the Role dropdown menu. Callout letter P points to the Accommodation dropdown menu. Callout letter Q points to the 'Show Unrostered' checkbox.

# Viewing and Editing a User's Account Information

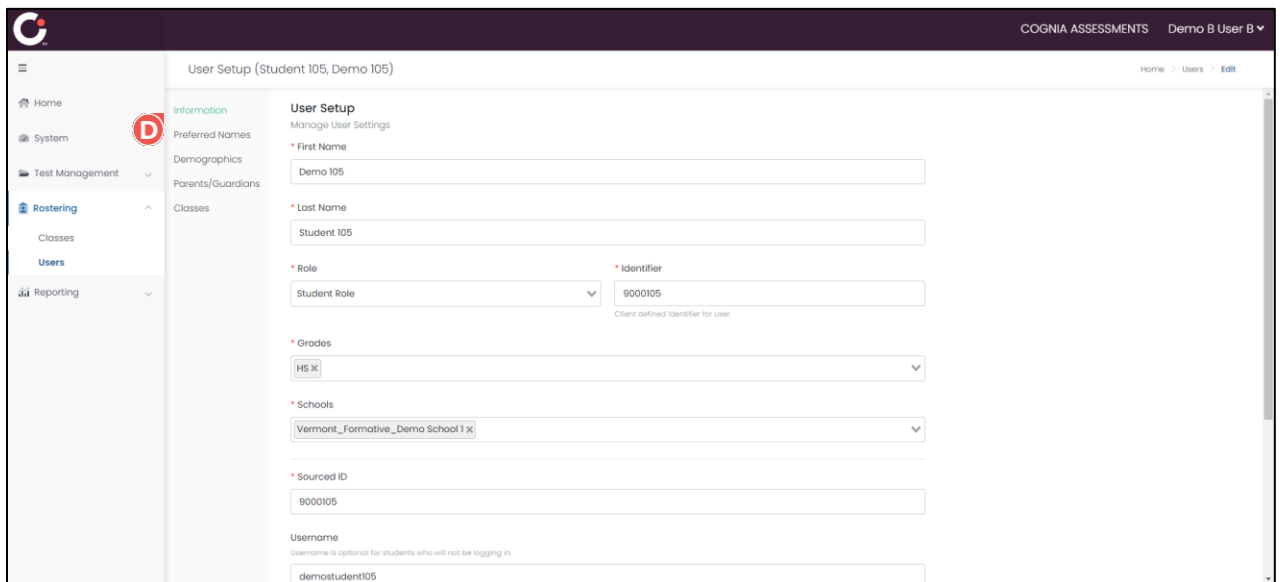
Once a user has been created, the user's information can be edited if necessary.





To view and/or edit a user's account information:

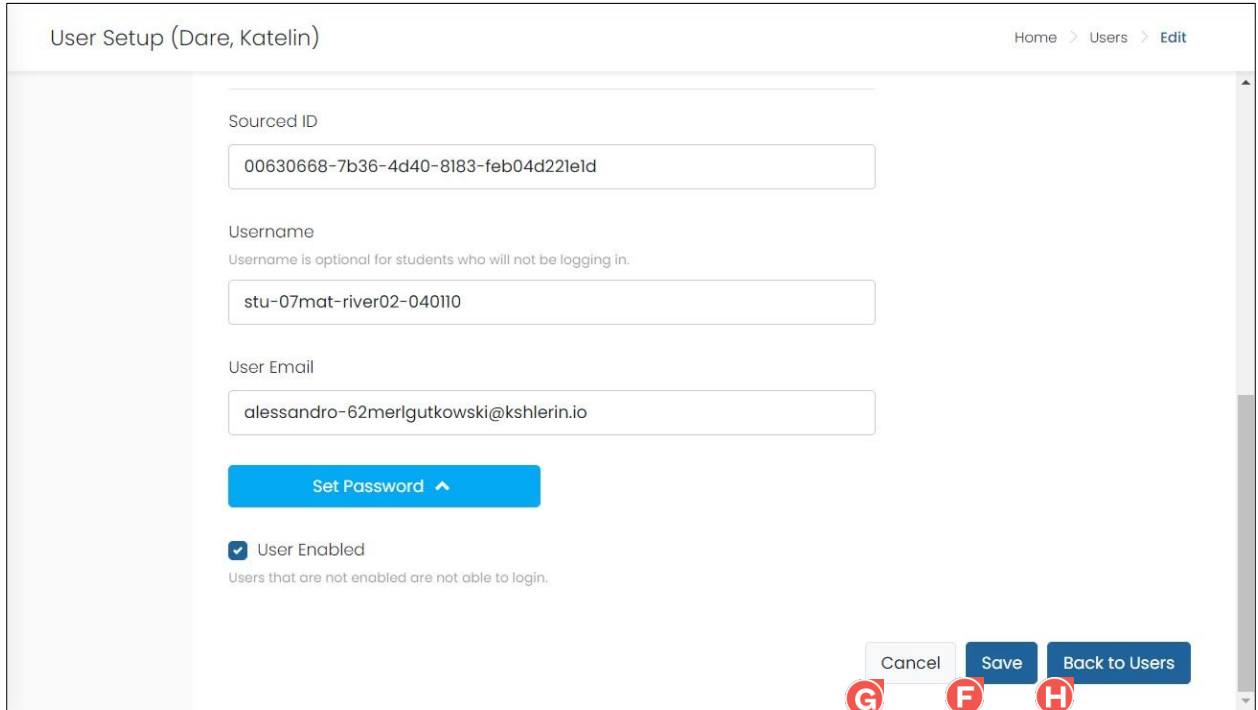
1. Select the **Rostering** **A** menu located on the left side of the page, and then select **Users** **B**. This opens the User Config page.
2. Locate the desired user in the list, and then click the **Edit** **C** icon located in the Actions column to the far right of the user. This opens the User Setup page for that user.



3. By default, the **Information** **D** menu is selected on the left side of the User Setup page. If edits are needed, make the desired edits to the user's information.



4. Once you have completed making any edits, click the **Save**  button located in the lower right of the page to save the changes. If edits aren't needed or the edits no longer need to be made, click the **Cancel**  or **Back to Users**  button, and then click **Discard Changes**  in the Unsaved Information popup (if prompted).



User Setup (Dare, Katelin) Home > Users > Edit

Sourced ID

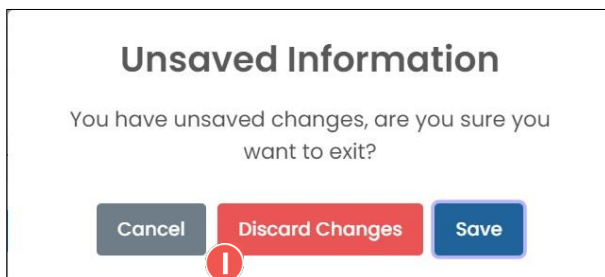
Username  
Username is optional for students who will not be logging in.

User Email

[Set Password ^](#)

User Enabled  
Users that are not enabled are not able to login.

[Cancel](#) [Save](#) [Back to Users](#)



**Unsaved Information**

You have unsaved changes, are you sure you want to exit?

[Cancel](#) [Discard Changes](#) [Save](#)

# Viewing and Editing a User's Classes

Editing a user's classes applies only to users with the "student" or "teacher" role.

To view and/or edit a user's assigned classes:

1. Select the **Rostrering** **A** menu located on the left side of the page, and then select **Users** **B**. This opens the User Config page.
2. Locate the desired user in the list, and then click the **Edit** **C** icon located in the Actions column to the far right of the student. This opens the User Setup page for that user.

The screenshot shows the 'User Config' page. On the left, the 'Rostrering' menu (A) is selected, and 'Users' (B) is chosen. The main content area displays a table of users. The user 'Dare, Katelin' is highlighted, and the 'Edit' icon (C) in the 'Actions' column is circled in red.

Family Name	Given Name	Username	Role	Classes	Orgs	Actions
Aufderhar	Adrain	stu-07mat-river02-030106	Generic Student Role	1	Cognia-03SCHL	[Edit] [Delete]
Dare	Katelin	stu-07mat-river02-	Generic Student Role	1	Cognia-04SCHL	[Edit] [Delete] (C)
Kovacek	Curt	stu-06mat-river02-	Generic Student	1	Cognia-03SCHL	[Edit] [Delete]

3. Select the **Classes** **D** menu located on the left side of the User Setup page. (This menu is only displayed for the "student" and "teacher" roles.) This displays the user's assigned classes.

The screenshot shows the 'User Setup (Dare, Katelin)' page. The 'Classes' menu (D) is selected in the left sidebar. The main area shows the 'Classes' section with a 'Schools' dropdown set to 'Cognia-04SCHL'. Below it is a 'Classes' dropdown with the text 'Choose Schools to populate classes...' and a 'Select Class' button. A table of assigned classes is shown below, with one class listed: '07MAT-River02-0401CLS' with school 'Cognia-04SCHL', course 'River02-07MAT', class code 'CLS\_CDE\_07MAT-River02-0401', subject 'MAT', academic session 'N/A', and teacher 'Evalyn'. A 'Remove' button is next to the class name.

Class Name	School Name	Course Name	Class Code	Subject	Academic Session	Teacher(s)	Remove
07MAT-River02-0401CLS	Cognia-04SCHL	River02-07MAT	CLS_CDE_07MAT-River02-0401	MAT	N/A	Evalyn	[Remove]

4. If the user is assigned to multiple institutions, select the desired institution from the **Schools** <sup>E</sup> drop-down to display the user's assigned classes under that institution.
5. If edits are needed, make the desired edits.
  - a. To add the user to a class, select the class from the **Classes** <sup>F</sup> drop-down, and then click the **Select Class** <sup>G</sup> button.
 

**Tip:** To search for a class, begin entering the class name in the **Classes** <sup>F</sup> field, and then select the class from the drop-down. (As you type, the drop-down automatically updates to display only the classes that match the entered criteria.)
  - b. To remove the user from a class, click the **Remove** <sup>H</sup> button located to the far right of the class. This opens a Confirm Remove box prompting you to confirm the action. Click **Remove** <sup>I</sup> to remove the student from the class. (If the user should no longer be removed from the class, click the **Cancel** <sup>J</sup> button.)

User Setup (Dare, Katelin) Home > Users > Edit

Information

Demographics

Accommodations

Classes

Administrations

History

### Classes

Schools

Cognia-04SCHL ▼

Classes

Choose Schools to populate classes... ▼

Select Class

Class Name	School Name	Course Name	Class Code	Subject	Academic Session	Teacher(s)	
07MAT-River02-0401CLS	Cognia-04SCHL	River02-07MAT	CLS_CDE_07MAT-River02-0401	MAT	N/A	Evalyn	<span style="background-color: #e91e63; color: white; padding: 5px 10px; border-radius: 3px;">Remove</span>

Cancel
Save
Back to Users

## Confirm Remove

Are you want to remove 07MAT-River02-0401CLS for Katelin

Cancel

Remove

6. Once you have completed making any edits, click the **Save** **K** button located in the lower right of the page to save the changes. If edits aren't needed or the edits no longer need to be made, click the **Cancel** **L** or **Back to Users** **M** button, and then click **Discard Changes** **N** in the Unsaved Information popup (if prompted).

User Setup (Dare, Katelin) Home > Users > Edit

Information

Demographics

Accommodations

Classes

Administrations

History

### Classes

Schools

Cognia-04SCHL

Classes

Choose Schools to populate classes... Select Class

Class Name	School Name	Course Name	Class Code	Subject	Academic Session	Teacher(s)	
07MAT-River02-040ICLS	Cognia-04SCHL	River02-07MAT	CLS_CDE_07MAT-River02-0401	MAT	N/A	Evalyn	Remove

Cancel
Save
Back to Users

## Unsaved Information

You have unsaved changes, are you sure you want to exit?

Cancel
Discard Changes
Save

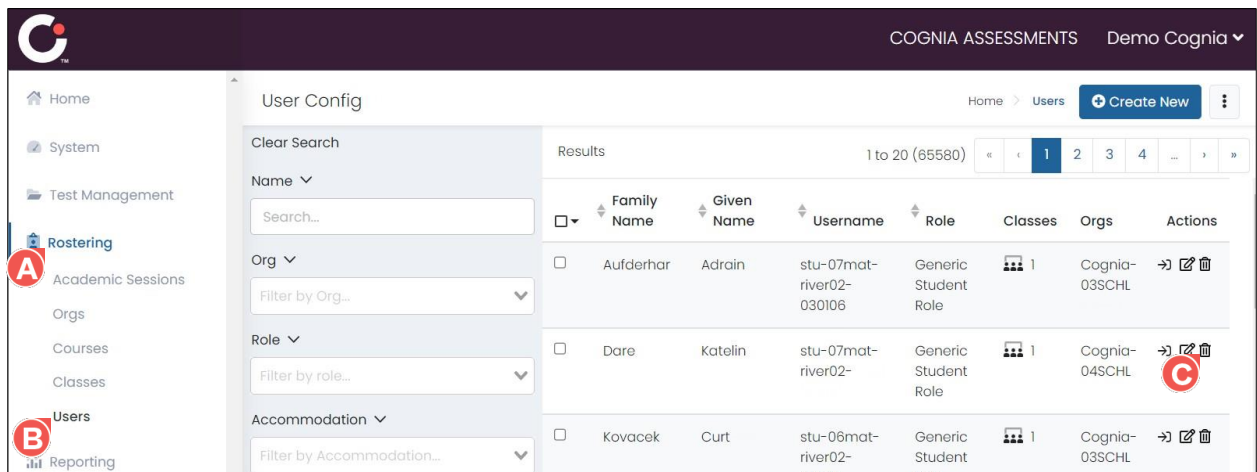


# Deleting a User

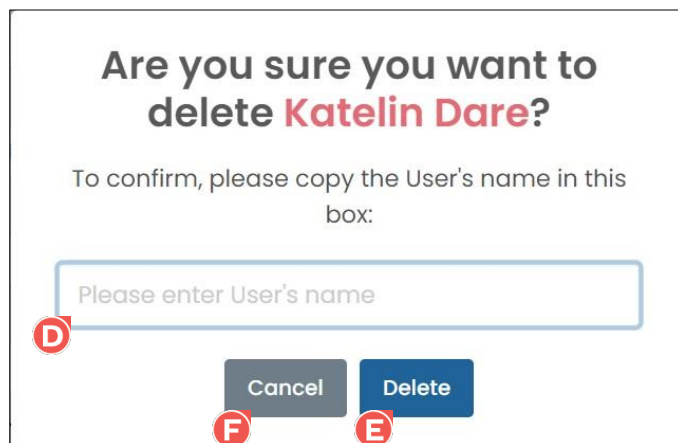
Users with the “student” role can only be deleted if they have not logged into a test session. Once a student has logged in to a test session, their user account can no longer be deleted.

To delete a user:

1. Select the **Rostering** **A** menu located on the left side of the page, and then select **Users** **B**. This opens the User Config page.
2. Locate the desired user in the list, and then click the **Delete** **C** icon located in the Actions column to the far right of the user. This opens a popup prompting you to confirm the action.



3. Either copy the user’s name that is displayed in the popup and then paste it in the **text box** **D**, or manually enter the user’s name in the **text box** **D**.
4. Click the **Delete** **E** button to permanently delete the user. (If the user should no longer be deleted, click the **Cancel** **F** button.) This deletes the user, and the user is no longer displayed in the user list.



# Data Uploads

If you have a group of users to be created and you would like them created in bulk, the data can be uploaded directly into the online platform.

## Data Submission Process

You will create a file of users in the IMS OneRoster file format, the OneRoster file(s) can be imported into the online platform (ADAM).

## Data Templates

Data templates for uploading users and students are available on the [Formative Resources](#) tab of the Vermont Help and Support website. Sample files are also available to use as a guide.

Within each template will be three tabs.

- Layout – this tab defines each column of the template, including which fields are required, a description of each field, and valid values.
- Template – this tab includes a blank template for you to complete with your user information.
- Schools – this tab displays a list of all Vermont schools with the corresponding school code. The school code must be used as the PrimaryOrgSourcedId in the template.

Once you have populated the template with your user information, save that tab only as a .csv file and upload it to the Rostering > Roster Uploads tab.

See the *Data Management: Rostering* quick start guide for additional information on completing and uploading the templates.

**Table 2: Data Templates**

Template Name	File Description
VT Formative_Users(Students)_OneRoster1.2	Provides administrator and teacher user data to be uploaded to the online assessment platform.
VT Formative_Users_OneRoster1.2	Provides student user data to be uploaded to the online assessment platform.



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