



Consultant Admin Account

Full Instruction Guide

Consultant Admin Account Administration Guide

This document outlines the features available in your admin account. Each section describes in detail what features are available and how to engage in the basic administration. We would also like you to take advantage of our suggested procedures for first time clients. You can go to our online virtual tour by [clicking here](#). This virtual tour will provide you with a step by step process as a first time user of this software.

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The features covered in this document are pages located off the top menu and its submenus. We also cover all the features found directly off your initial home page.



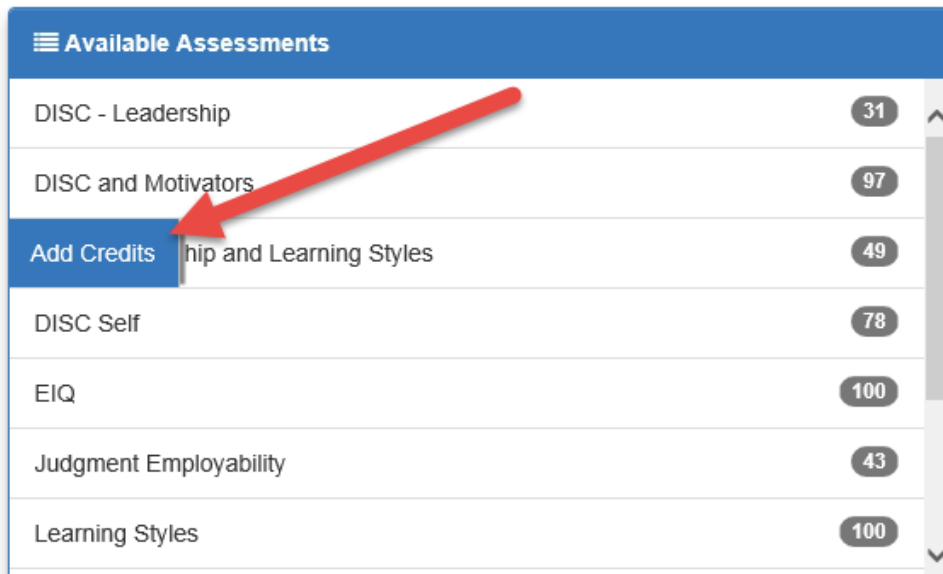
Home – Assessment Account Initial Starting Page

Purchasing Assessments

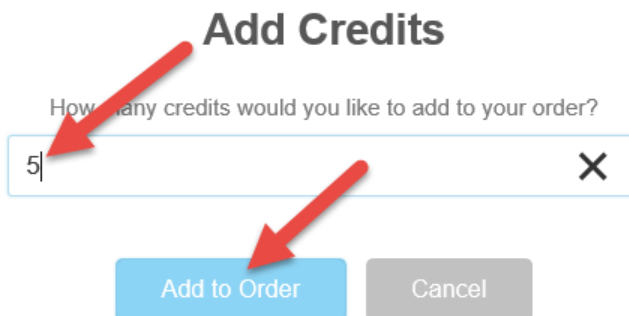
If your account has been set up to purchase assessments on a “**pay as you go**” basis, you will have access to buying them **directly from your home page**. If you are a “**billable monthly**” client, you will simply see the list of available assessments without a purchase option.

This is also the screen where you can get a quick view of your balance for each assessment. If you are a billable monthly client you will see “Unlimited” as the balance, if not, you will see a number. If that number reaches 0, you will not be able to invite new assessment users until you bring this balance to a positive number.

To **purchase credits**, hover over the name of the assessment and click the “**Add Credits**” button. You can also click directly on the assessment name.



You will be asked to enter a total and click “**Add to Order**”. You can repeat this process if you want to bundle multiple assessments into one order.



To complete your order, fill in the credit card details below the total and click “**Submit Order**”. Your credits will be immediately added to your account. Your credit card will also be immediately billed.

The screenshot shows a credit card entry form. At the top, there are two items: "DISC Self" for \$50 x 25 = \$1250 and "DISC and Motivators" for \$90 x 10 = \$900. The total is \$2150. The form includes fields for Card Number, Name on Card, Expiration Date (with dropdown menus), Security Code, Address, City, Country (set to United States), State (dropdown), and Zip. At the bottom, there is a radio button labeled "Use credit card on file." and a blue "Submit Order" button. Red arrows point from the "Total: \$2150" field to the "Submit Order" button.

If you have put your credit card on file via the **Account** page, there will be an option to use your card on file. You can then click that option followed by “**Submit Order**”.

The screenshot shows the same credit card entry form, but with the "Use credit card on file." option selected (radio button is green). A Visa credit card is displayed in the center, with the card number 4444*****7777 and the name BARBARA JACKSON. The total is \$1250. Red arrows point to the card image, the "Use credit card on file." option, and the "Submit Order" button.

SEND ASSESSMENTS

You have **two options** for inviting people to complete assessments using your account.

1. You set up **Assessment Access Links** that you copy and paste into an email you send from your personal email program.
2. You use our built in system for manually inviting individuals one by one, or via an import. **In order to send invitations via this process you need to set up an Assessment Access Link first.** The details on setting up these links start on page 19 of this document.

Once you have set up the details of your Assessment Access Link (page 19 of this document), you can use the manual inviting process found on your home page. Here are the steps.

1. Select the Assessment Link
2. Type in the email address of the assessment user
3. Type in the first name and last name of the assessment user
4. Decide if you want to modify the default email (originally created during step 7 of setting up your assessment access link)
5. Click the **“Send Assessment Link”** button

The screenshot shows a web form titled "Send Assessment" with a blue header. The form contains the following fields and options:

- Select Assessment Link:** A dropdown menu with "Customer Service Team" selected. A red arrow points to this dropdown.
- Email Address:** A text input field containing "Harold@Carrington.com".
- First Name:** A text input field containing "Harold". A red arrow points to this field.
- Last Name:** A text input field containing "Carrington". A red arrow points to this field.
- Custom Email:** Radio buttons for "No" (selected) and "Yes".
- Import Users:** A button located below the "Custom Email" section.
- Send Assessment Link:** A blue button at the bottom right. A red arrow points to this button.

An email will be sent to the assessment user. Settings such as who receives the reports, expiration dates, which assessment is assigned, viewing results, etc. are part of the assessment link setup. By having those in place from the start, this manual inviting process is quick and easy.

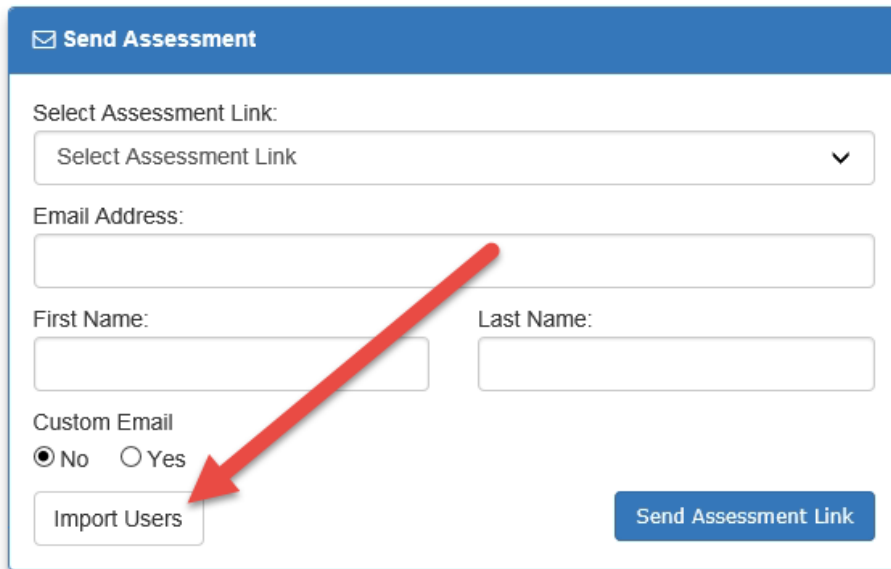
If you wish to edit the email for a particular person, you can click **YES** under “Custom Email”. This will bring up an email editor where you can make your text adjustments. When finished, click the same “**Send Assessment Link**” button. **NOTE: you can modify this email for that particular assessment link by editing the details of that link.** This will change the default for all future invites from this link. This edit email feature is designed to allow you to make custom edits for particular situations. If you want everyone to have those same edits, go back to the link and make the edit.

The screenshot shows the 'Send Assessment' interface. At the top, there's a blue header with a mail icon and the text 'Send Assessment'. Below this, there's a 'Select Assessment Link:' dropdown menu with 'Customer Service Team' selected. Underneath is an 'Email Address:' field containing 'Harold@Carrington.com'. There are two input fields for 'First Name:' (containing 'Harold') and 'Last Name:' (containing 'Carrington'). A 'Custom Email' section has two radio buttons: 'No' and 'Yes', with a red arrow pointing to the 'Yes' option. Below that is an 'Email Subject' field with the text 'Assessment confirmation email'. The main area is 'Email Content', which features a rich text editor toolbar with various icons for text formatting and alignment. The content area contains the following text: 'Dear %%e_FirstName%%:', '%%A_Name%% thanks you for taking our assessment.', 'Please click on the link provided below to gain future access back to your account.', a blue link placeholder '%%enduseraccesslink%%', and a red instruction: 'Please save this email so you can easily log back into your account with the link above.' At the bottom of the editor, there are tabs for 'Design', 'HTML', and 'Preview', along with a word and character count: 'Words: 87 Characters: 577'. Finally, there are two buttons at the bottom: 'Import Users' and 'Send Assessment Link', with a red arrow pointing to the latter.

Anything surrounded by %%'s is a dynamic variable and will fill in automatically. For example, %%e_firstname%% will merge in the assessment users FIRST NAME. **Dear John, ...**

Another feature that is available to you on this “Send Assessment” option is to import a list of assessment users at one time. You have the option to then send the email upon import, or you can simply import and use the tools on the “Assessment Users” page to send the email at a later date.

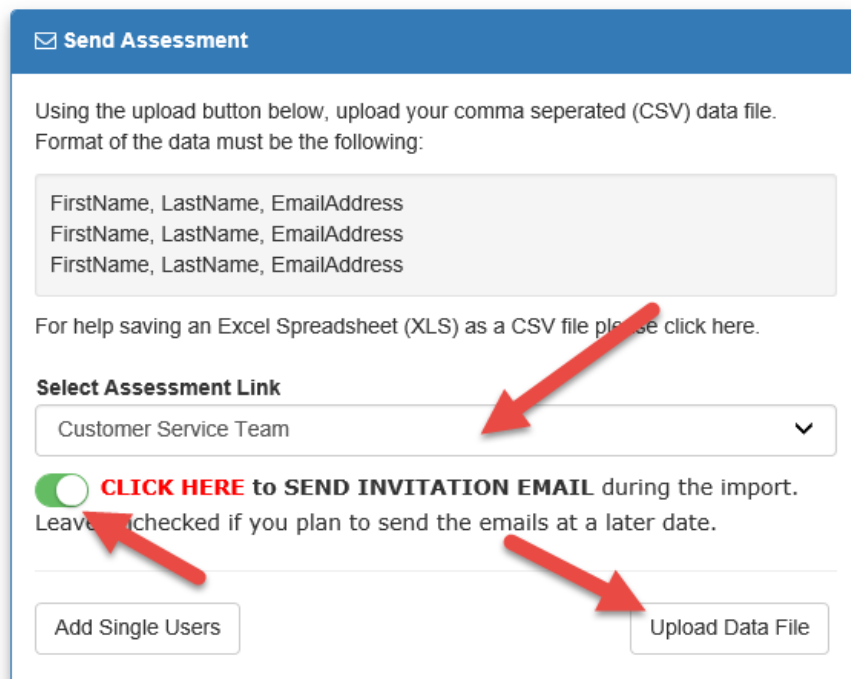
To start the process, click on the “Import Users” button.



The screenshot shows the 'Send Assessment' form. At the top, there is a blue header with a mail icon and the text 'Send Assessment'. Below this, there is a dropdown menu labeled 'Select Assessment Link' with the text 'Select Assessment Link' and a downward arrow. Underneath is an 'Email Address:' field. Below that are two fields for 'First Name:' and 'Last Name:'. There are radio buttons for 'Custom Email' with 'No' selected and 'Yes' unselected. At the bottom left is a button labeled 'Import Users' which is highlighted by a red arrow. At the bottom right is a blue button labeled 'Send Assessment Link'.

This will bring up a set of options which include

1. Selecting the assessment link
2. Sending the invitation email upon import, YES or NO (Turning off the **Green** button means NO)
3. Uploading your data file



The screenshot shows the 'Send Assessment' form with instructions for uploading a CSV file. It says 'Using the upload button below, upload your comma seperated (CSV) data file. Format of the data must be the following:' followed by a code block: 'FirstName, LastName, EmailAddress', 'FirstName, LastName, EmailAddress', 'FirstName, LastName, EmailAddress'. Below this is a link: 'For help saving an Excel Spreadsheet (XLS) as a CSV file please click here.' There is a dropdown menu for 'Select Assessment Link' with 'Customer Service Team' selected. Below the dropdown is a green radio button with the text 'CLICK HERE to SEND INVITATION EMAIL during the import. Leave unchecked if you plan to send the emails at a later date.' This radio button is highlighted by a red arrow. At the bottom left is a button labeled 'Add Single Users' and at the bottom right is a button labeled 'Upload Data File' which is also highlighted by a red arrow.

Once you click “**Upload Data File**”, you will be prompted to select a file from your local computer. **You can upload a .txt file or a .csv file.** Examples of both are below. Select the file from your computer and load it into our system.

Example .CSV file

	A	B	C
1	PersonAFirst	PersonALast	email@email.com
2	PersonBFirst	PersonBLast	email@email.com
3	PersonCFirst	PersonCLast	email@email.com
4	PersonDFirst	PersonDLast	email@email.com
5	PersonEFirst	PersonELast	email@email.com
6			

In the .CSV file the first name, last name and email address are in separate columns.

Example .TXT file

```
File Edit Format View Help
PersonAFirst, PersonALast, email@email.com
PersonBFirst, PersonBLast, email@email.com
PersonCFirst, PersonCLast, email@email.com
PersonDFirst, PersonDLast, email@email.com
PersonEFirst, PersonELast, email@email.com
```

In the .TXT file the first name, last name and email address are separated by a comma.

After you have selected your file, the page will display the users and ask you to confirm your import. If everything looks correct, click “**Import Assessment Users**”.

Select Assessment Link

Customer Service Team ▼

CLICK HERE to SEND INVITATION EMAIL during the import.
 Leave unchecked if you plan to send the emails at a later date.

Verify Uploaded Data

Verify the data below and then use the Import Assessment Users button to start the importing process.

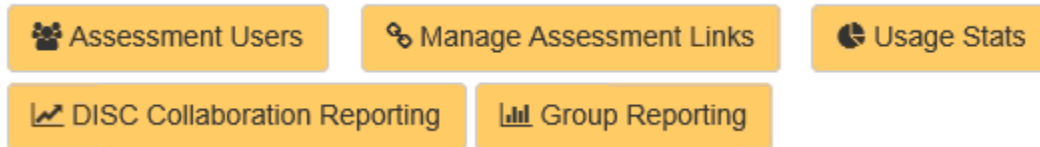
- Jeff Carter <jeff@carter.com>
- Johnny Barnes <johnny@barnes.com>
- Kathy Simon <kathy@simon.com>
- Beth Sanders <beth@sanders.com>
- Lyle McLean <lyle@mclean.com>

Import Assessment Users

Importing **5** Assessment Users.

Your Quick Access Buttons

On your home page you will notice a few buttons located on the top right of the screen. These are **quick access buttons** to some of the main features of your account.



1. **Assessment Users** takes you to the list of people who have completed assessments or have been invited to complete an assessment(s). This is where you can view completion status, make edits, view PDF reports, assign additional assessments, etc. The details are covered in page 14 of this document.
2. **Manage Assessment Links** is where you set up your assessment links that give assessment users access to completing assessments, either via the link directly or the manual inviting process found on your home page. The details are covered in page 19 of this document.
3. **Usage Stats** will provide you with statistics on purchases, assessments used and balance totals. The details are provided in page 10 of this document.
4. **Group Reporting** is where you can create collaborative reports based on selected users. These could be team reports, team wheels or data exports. The details are provided in page 23 of this document.
5. **DISC Collaboration Reporting** (if applicable) is a DISC based feature that allows you to compare two individuals side by side. This is a DISC only feature and is applicable if you are using DISC assessments. The details are covered in page 25 of this document.

Usage Statistics

To view usage statistics, such as how many assessments were purchased, distributed and completed over a particular date search, click on the “Usage Statistics” button located on your home page. It is one of the Quick Access buttons.

The page will load with the most current month’s data. If you want to obtain an individual breakdown of assessments users, click on “Export to Excel”. If you do this immediately after performing a date search you will be able to view a report that shows each assessment user that completed an assessment. This report will include the name of the user, their email, group assigned, link assigned, assessment completed and date completed.

Usage Statistics

Choose a date range below.

From 3/1/2016 Through 4/30/2016 [Get Report](#) [Export to Excel](#)

Assessment	Credits Received	Credits Distributed	Credits Completed
Account: Assessment Demo Company ; Credits: Received , Distributed , Completed			
Group: -- None --; Summary:	Credits Received: 531	Credits Distributed: 0	Credits Completed: 0
Group: ABC Location ; Summary:	Credits Received: 0	Credits Distributed: 3	Credits Completed: 1
Group: Branch X ; Summary:	Credits Received: 0	Credits Distributed: 0	Credits Completed: 0
Group: Seminar Attendees ; Summary:	Credits Received: 0	Credits Distributed: 0	Credits Completed: 0
Group: Training Date Y ; Summary:	Credits Received: 0	Credits Distributed: 0	Credits Completed: 0
	Total: 531	Total: 3	Total: 1
	Total: 531	Total: 3	Total: 1











You can obtain additional information about dates credits were received, order totals and distributed assessments by clicking on the “Received”, “Distributed” and “Completed” links.

Assessment	Credits Received	Credits Distributed	Credits Completed
Account: Assessment Demo Company ; Credits: Received , Distributed , Completed			

Home Page Resources

Depending on the assessment website you are using, various options will appear under the Resources section on your home page. In some cases, you might have access to training materials, sample reports, assessment demos or other various resources. Here are some examples.

Resource Center

-  **Virtual Tour Of Your Account**
A quick overview of your account
-  **DISC Trainer Materials**
Password is **peoplesmarts**
-  **DISC Certification**
DISC Practitioner Certification
-  **Marketing One-Sheets**
Download one-sheets
-  **Sample Reports**
Download Sample PDF reports
-  **Demo Assessments**
Use them for personal demos
-  **Webinars**
Previously recorded webinars
-  **Platinum Rule Trainer Materials**
Password is **peoplesmarts**
-  **Sales IQ Plus Trainer Materials**
Password is **siqtraining**
-  **EIQ (Emotional Intelligence) Trainer Materials**
Password is **eiqtraining**

- **If this is your first time using our system, please "[click here](#)" to download our recommendations for getting started. The full site instruction guide is located on the top menu under resources.**
- **Give step by step instructions to your End Users on how to engage in the 360 component of the software. [Click here](#) to download a PDF which you can attach to your invitation emails.**

Managing Assessments

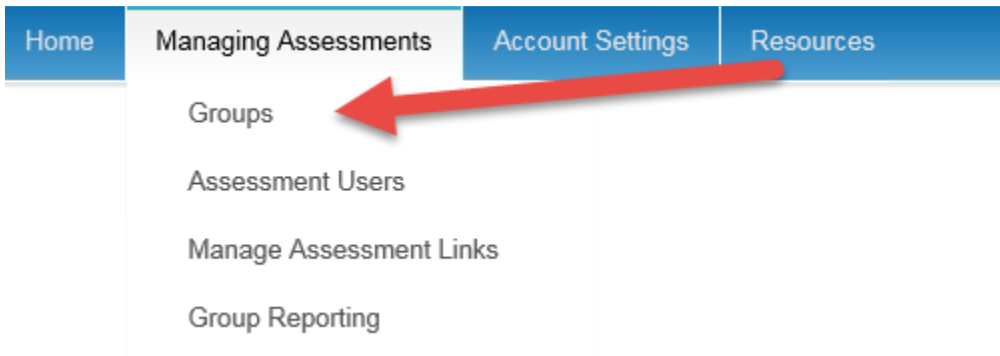
GROUPS

Groups are an optional feature of your account, although recommended. Groups are designed to help you organize and access your assessment users by date, company, class, division, location, event, etc.

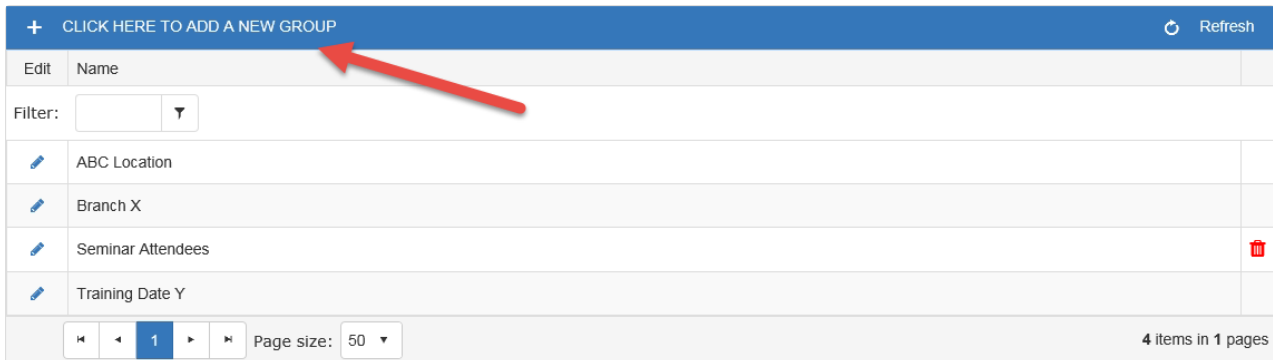
On this page you can add a new group or edit an existing group. If you have sold assessments to a particular group of people (company, department. etc.), you might want to create a group so when you create “**Assessment Links**” the group name will be there for you to assign to the assessment users. **The groups feature is used to categorize your assessment users for ease in management and searching.** From the Assessment Users page you can filter by a particular group. You can also use groups when creating team reports.

ADD A NEW GROUP

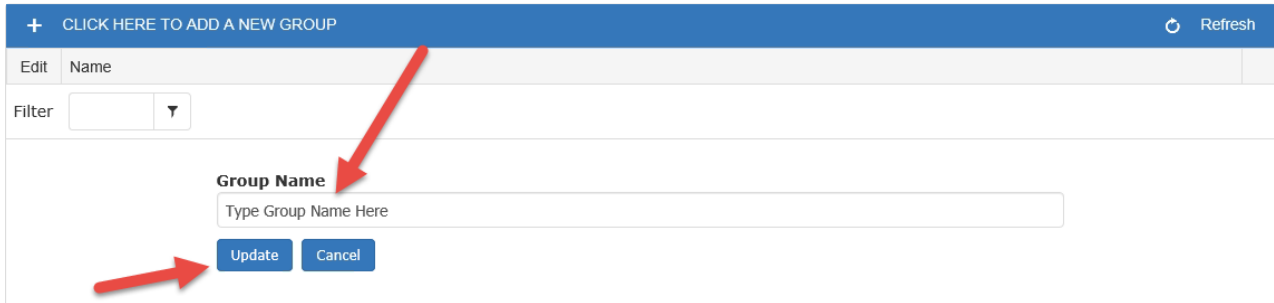
From the Managing Assessments tab, click on **GROUPS**.




Once on this page, click on "**CLICK HERE TO ADD A NEW GROUP**".



To add a new group to your list, type in the name of the group and click **“Update”**.




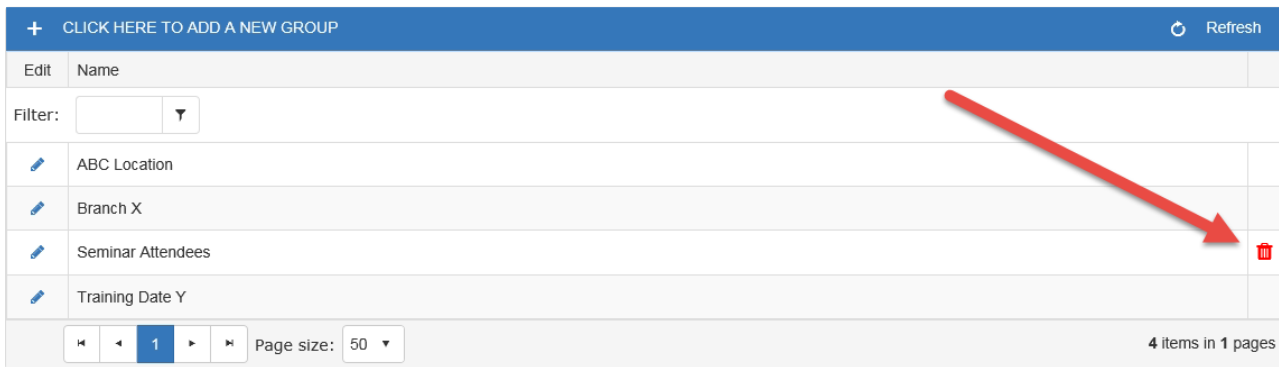
EDIT AN EXISTING GROUP

Click on the **“Edit”** icon (pencil ) next to the group name you wish to edit. Modify the name of the group and click the **“Update”** button. Your group name will then be modified.



DELETE A GROUP

Click on **“Delete”** icon  next to the group name below. You can only delete a group if you **DO NOT** have any assessment users assigned to the group. If you do, you will need to move all assessment users out of the group before you delete the name. Notice the delete button will not appear if you have assessment users assigned to your group.



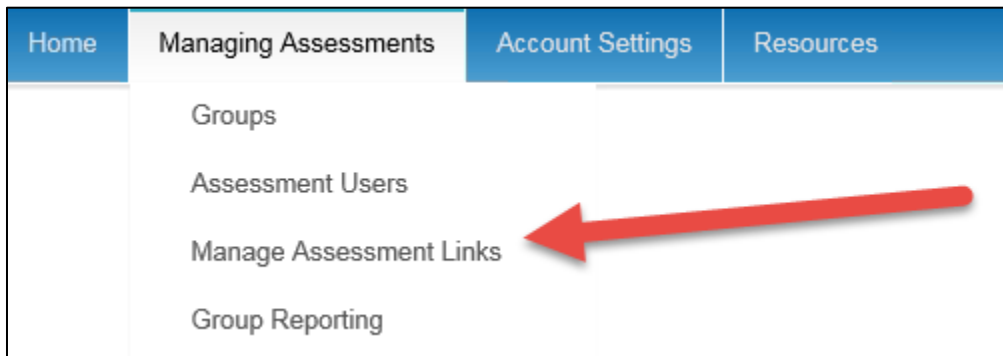
ASSESSMENT ACCESS LINKS

Assessment access links are the critical piece to offering assessments to your users. These links give an assessment user, or groups of assessment users, access to take one or more assessments.

On this page you can create links which you may email your assessment users, so they can take assessments. You also have the option of using our system to send invitations using the **“Send Assessments”** feature found on your home page. This will allow you to send an email from our system with a unique link, for that **individual only**, to complete the assessment. These individual invites are associated with the assessment access links, which is why this piece needs to be set up in advance. Once you create a link, you also have the option to email it to all the people you wish to take the assessment(s). **Use your own email (such as Outlook, Mac Mail or Gmail) to send the links.**

CREATE A NEW LINK

From the Managing Assessments tab, click on **Manage Assessment Links**.



To create a new Assessment Access Link click on **"CREATE A NEW ASSESSMENT ACCESS LINK"**.

+ CREATE A NEW ASSESSMENT ACCESS LINK					Refresh
Edit	Name	Short Link	Group Association	Created	
	Filter				
	Sales Team	http://www.YourDomain.com/?R*-P(4==R	ABC Location	2016-03-28	
	Programming Department	http://www.YourDomain.com/?R*-%7b(2==R		2016-03-23	
	Training ABC	http://www.YourDomain.com/?R*-p(z==R		2016-03-22	
	Seminar Dallas	http://www.YourDomain.com/?R*-u(w==R	Training Date Y	2016-03-14	
	New Hires	http://www.YourDomain.com/?R*-N(K==R		2016-03-09	
	Upper Management	http://www.YourDomain.com/?R*-F(c==R&l=5		2016-03-07	
	Client A	http://www.YourDomain.com/?R*-e(%22==R	Branch X	2016-03-01	
	Customer Service Team	http://www.YourDomain.com/?R*-%5b(V==R		2015-12-21	

Page size: 50 | 8 items in 1 pages

Assessment Access Links

Create links which provide access to individuals to take your assessments. Click any of the ? icons to get help about that item.

- Assessment Access Link Name** - What you would like to call this link? The name is for your own internal reference for identification purpose. For example: “Marketing Department – ABC Company”
- Allow Observers** – If you are using an assessment that requires 360 observer assessments, you will activate this option.
- Allow to View Reports** - Do you want your assessment users to be able to view their graphs and reports immediately after taking an assessment? If yes, check this box. If not, leave it blank. Many coaches and seminar leaders prefer to block access to the graphs and reports; preferring to print copies and bring the reports to the class/session.
- Email a copy of the report to the assessment user** - If you want each assessment user to receive a copy of the report via email check this box, if not, leave it unchecked. If in step 3 you have unchecked the ability for the Assessment user to see the results this check box will NOT be active. It is only available if you are allowing access for each Assessment user to view the results.
- Groups** - You can assign a group to the link. All assessment users that use this link will fall into this selected group. You can search for these assessment users by group using the filter tools located on the “assessment users” page. You can also easily create group reports based off the group names. Groups are just another way to categorize and filter your Assessment users. It is **NOT required** to create a group or to assign a group to an Assessment Access Link.

6. **Language** – If you have language options you would select them from the drop down menu. Some of our assessments are available in multiple languages. The default language is “English”. **This setting controls the web pages only and NOT the actual PDF report.** You will also need to select the language assessment on the right for the questionnaire AND the report to be in that language.
7. **Confirmation Email** – This email is sent to the Assessment user upon registration. Click on the edit icon to view the default copy our system supplies. If you want to make edits to the copy you can do so via the email editor. **Each Assessment user who registers via your link will receive a confirmation email.** There are a variety of uses for this email. Mainly it provides a “Return Link” which the assessment user can use to gain access back to the system to complete an assessment that was not finished or obtain report information (if applicable). The email can also be used as a “thank you” email or to explain additional directions. Another use is to promote your upcoming meeting or additional products and services. There are a variety of uses and you have full control over what appears in the email.
NOTE: If you wish to NOT have this email sent, remove the content in the body and the subject. This will be recognized by our system and NO email will be sent.
8. **Manual Invite Email** - This email is sent to the assessment users if you are “Pre Registering” them on your homepage instead of directly sending them the Assessment Access Link you are about to create. This email will act as an “Invitation” to the assessment. It will be the first email they receive about the assessment. It will give them their personal access to their own assessment. Just like the Confirmation email you can click on the edit icon to view the default copy our system supplies. If you want to make edits to the copy you can do so via the email editor. Do **NOT** edit anything in between the %%. These are merge variables and will automatically generate this piece of information when sent from the system.
9. **Send Reports To** - Choose an email address where you would like a copy of the PDF reports emailed. This is NOT required. **If you wish to add multiple email addresses you can do so separated by a ;**.
Example: email@email.com;assessment@email.com. This is designed for managers and administrators and NOT the assessment user.
10. **Report is Attached Email** – If you are having a copy of the PDF report emailed to specified email addresses or to the Assessment user, a “Report is Attached” email will be sent along with the PDF report. If you wish to edit the content of this email click on the “edit” icon to the right. This will bring up the HTML editor. The system will send the default “Report is Attached” email if no edits have been made. This is a great feature which allows you to determine when an Assessment user has completed an assessment and allows you to obtain the PDF report without logging back into the software.
11. **Expires On** - You can choose a date in which your assessment access link will expire. The date is based off UTC (Universal Coordinated Time). This is an optional setting. If you do not wish to use an expiration date, leave it blank. If an assessment user tries to use the Assessment Access Link after this date it will become inactive. This could be relevant for a hard deadline for a training session or for a promo you are running. Once again, this is a feature designed to prevent excessive use of an Assessment Access Link.
12. **Choose Assessments** – Choose which assessment(s) you want to assign to the link. Turn on the toggle next to each assessment you would like your assessment user(s) to take.
13. When finished click “**Insert**”








NOTE: Some account admins have an additional field called “**Number of Uses**”. This is an option that can be activated for your account. This is a field where you can specify the maximum number of times a particular link can be used before it becomes automatically deactivated. If you have this feature activated in your account, you will need to specify a number.

Number of Uses 


After clicking insert when you have created your link, you will now see your new link in your table list. You can copy and paste this link into emails, documents, web pages, etc. When an assessment user clicks this link, he/she will register by providing their name and email address and then proceed to the assessment user administration page to take the assessment(s). You also have the ability to manually invite people via your home page as covered in page 5 of this document.







NOTE: if you have a link that is RED, that means it is no longer active. The reason for this is one of the following. It has reached the expiration date, you have run out of assessment credits or your “number of uses” has reached 0. If you see a red link that you are actively using, please check the settings by clicking on the pencil to edit. One of the above reasons will have occurred.

[Click here for detailed instructions regarding ASSESSMENT LINKS.](#)


+ CREATE A NEW ASSESSMENT ACCESS LINK		
Edit	Link Name	Assessment Link
Filter	<input type="text"/>	<input type="text"/>
	Test	http://a24x7.us/?R*%7d1xU==R
	Company A	http://a24x7.us/?R*%7dfxJ==R
	Company B	http://a24x7.us/?R*%7d%29x%60==R
	HR Group	http://a24x7.us/?R*WlqD==R
	Kmart	http://a24x7.us/?R*WBq1==R
	Sales Team	http://a24x7.us/?R*WdqI==R
	Disney	http://a24x7.us/?R*W7q==R







EDIT A LINK

You can **edit** the information assigned to an assessment link at any time. Click on the edit icon (pencil ) next to the link.

	Sales Team	http://www.YourDomain.com/?R*-P(4==R	ABC Location	2016-03-28	
	Programming Department	http://www.YourDomain.com/?R*-%7b(2==R		2016-03-23	
	Training ABC	http://www.YourDomain.com/?R*-p(z==R		2016-03-22	

DELETE A LINK

You can **delete** an assessment link at any time. Click on the delete icon  to the far right of the link. This will disable the link and remove it from your list. **You cannot retrieve a deleted link.**

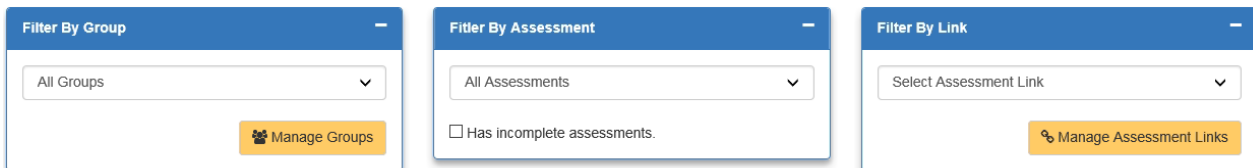
	Sales Team	http://www.YourDomain.com/?R*-P(4==R	ABC Location	2016-03-28	
	Programming Department	http://www.YourDomain.com/?R*-%7b(2==R		2016-03-23	
	Training ABC	http://www.YourDomain.com/?R*-p(z==R		2016-03-22	

ASSESSMENT USERS

In this area, you can view and edit all your existing assessment users, send email's, monitor status and view report data.

SORTING AND FILTERING

You can use the various sorting and filtering options to quickly locate a particular individual, assessment link or group. You can also filter by a particular assessment or find those that have incomplete assessments.



You can also filter/search by typing in data in the column headers. There is a small icon to the right of the box in which you can choose to filter by a variety of criteria. For example “contains”, “starts with”, “ends with”, etc. You can also sort alphabetically by clicking on the column headers.

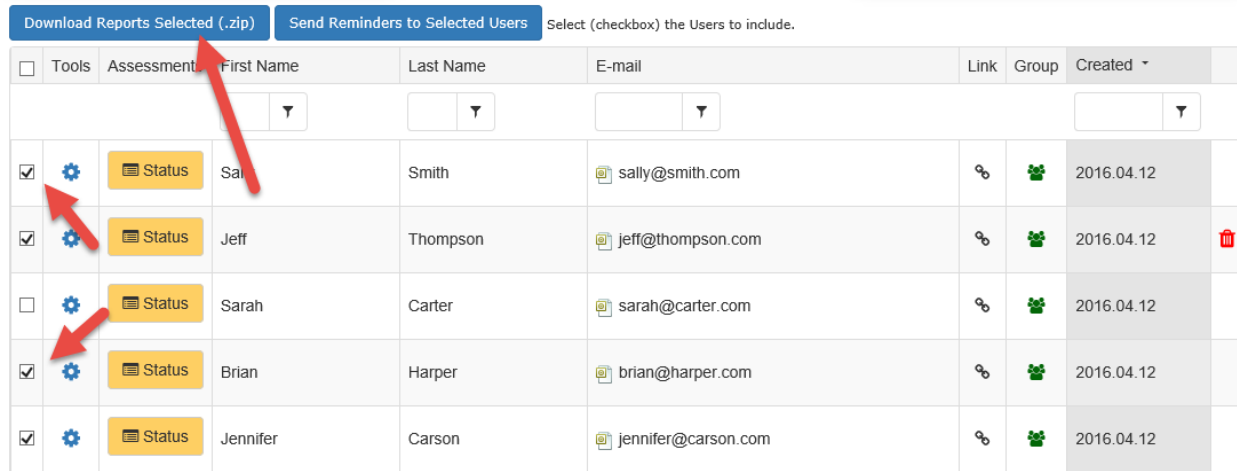
<input type="checkbox"/>	Tools	Assessments	First Name	Last Name	E-mail	Link	Group	Created
<input type="checkbox"/>			Sally	Smith	sally@smith.com			2016.04.12
<input type="checkbox"/>			Jeff	Thompson	jeff@thompson.com			2016.04.12
<input type="checkbox"/>			Sarah	Carter	sarah@carter.com			2016.04.12
<input type="checkbox"/>			Brian	Harper	brian@harper.com			2016.04.12
<input type="checkbox"/>			Jennifer	Carson	jennifer@carson.com			2016.04.12
<input type="checkbox"/>			Walter	Brown	walter@brown.com			2016.03.16
<input type="checkbox"/>			Ruth	Collins	ruth@collins.com			2015.12.23
<input type="checkbox"/>			Greg	Williams	greg@williams.com			2015.12.22

VIEW REPORTS

To view the individual reports, start by filtering the data in order to show all the assessment users you wish to work with on one screen. Click on the gear icon next to each individual. This will bring up some menu options, one being **View Reports**. Click on **View Reports** and a page will appear that gives you access to downloading that particular individual's PDF report.

<input type="checkbox"/>		Edit User	Smith	john@johnsmith.com			2016.03.23	
<input type="checkbox"/>		Impersonate User	Jones	jack@jackjones.com			2016.03.22	
<input type="checkbox"/>		Manage Assessments	Robertson	beth@robertson.com			2016.01.14	

You have another option to obtain individual reports and that is by clicking on the button labeled “**Download Reports Selected (.zip)**”. This feature allows you to download multiple reports at one time. If you are looking to obtain the individual PDF files of multiple individuals, you can use this feature. To begin, click the checkboxes next to the assessment users you wish to include in the zip file download.



The screenshot shows a table with columns: Tools, Assessment, First Name, Last Name, E-mail, Link, Group, and Created. There are five rows of user data. The first row is for Sally Smith (sally@smith.com), the second for Jeff Thompson (jeff@thompson.com), the third for Sarah Carter (sarah@carter.com), the fourth for Brian Harper (brian@harper.com), and the fifth for Jennifer Carson (jennifer@carson.com). Each row has a checkbox in the 'Tools' column. A red arrow points to the 'Download Reports Selected (.zip)' button at the top left of the table.

<input type="checkbox"/>	Tools	Assessment	First Name	Last Name	E-mail	Link	Group	Created
<input checked="" type="checkbox"/>		Status	Sally	Smith	sally@smith.com			2016.04.12
<input checked="" type="checkbox"/>		Status	Jeff	Thompson	jeff@thompson.com			2016.04.12
<input type="checkbox"/>		Status	Sarah	Carter	sarah@carter.com			2016.04.12
<input checked="" type="checkbox"/>		Status	Brian	Harper	brian@harper.com			2016.04.12
<input checked="" type="checkbox"/>		Status	Jennifer	Carson	jennifer@carson.com			2016.04.12

Once you have selected the users, click on the button that says “**Download Reports Selected (.zip)**”. This will bring up a page that verifies your selections and allows you to click the final “**Download Reports**” button. A .zip file will be created that includes your selected users.

VIEW STATUS

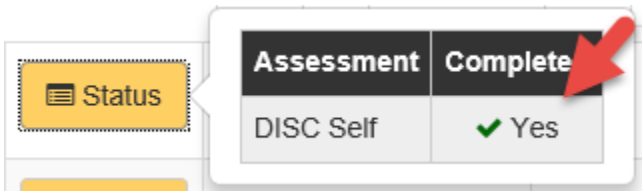
To view the status of an assessment user, click on the **STATUS** button next to the name.



A close-up of the 'Status' button for Sally Smith. A red arrow points to the 'Status' button.

	Status	Sally	Smith	sally@smith.com		
--	--------	-------	-------	-----------------	--	--

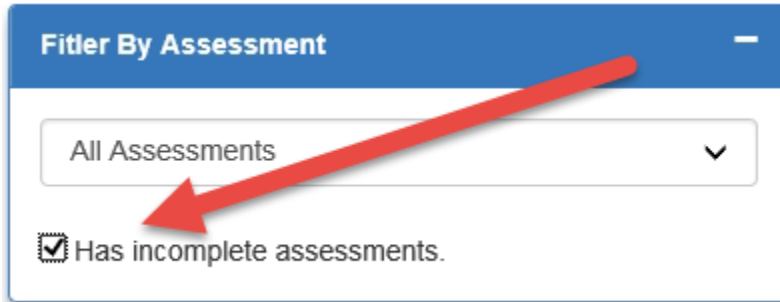
This will show you the status of the assigned assessments. Under the completed column you will see either a YES or NO.




The screenshot shows a pop-up window with a 'Status' button on the left. The main window has two columns: 'Assessment' and 'Complete'. Under 'Assessment' is 'DISC Self'. Under 'Complete' is 'Yes' with a green checkmark. A red arrow points to the 'Complete' column.

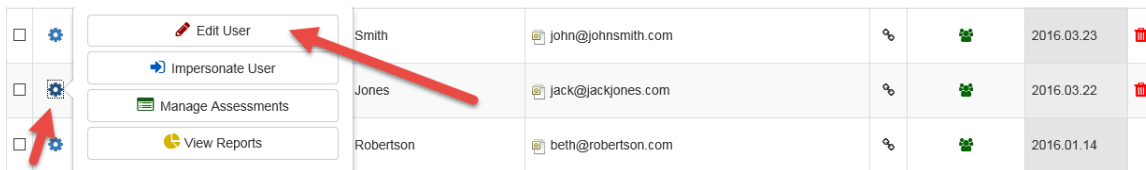
Status	Assessment	Complete
	DISC Self	✓ Yes

If you want to see all the assessment users who have incomplete assessments, use the filter option at the top of the page called **“Has incomplete assessments”**. Click on the checkbox and the grid will **ONLY** show people who have not completed the assigned assessments.



EDIT AN ASSESSMENT USER

Click on the gear icon  next to the name you wish to edit. This will bring up the option to edit that particular individual. Click on **“Edit User”**.



On this edit page you can make your desired edits and then click **“update”** to save your changes.

Language
English

Groups
Branch X

First Name
Sally

LastName
Smith

Email
sally@smith.com

Active
 Allow Observers
 View Reports Allowed

Return Link <http://www.a24x7.us/EndUserAdmin/?883bfbd-f77e6-4208-936e-f49d7a11daa3>

One important feature that is available is the “Return Link” found on this assessment user edit screen. If you get the request from an individual needing access back to finish an assessment or to simply go to their existing account, you can copy this link and email it to the individual. This link will give access right back to their account.

Return Link <http://www.YourDomain.com/EndUserAdmin/?cd31de2d-8228-47e4-8959-68abb487d6a0>

You can also edit multiple users’ information at one time. First you would select the user’s check boxes then select the “Edit Selected Users” button.

<input type="checkbox"/>	Tools	Assessment	First Name	Last Name	E-mail
<input checked="" type="checkbox"/>			Natalie	Cole	natalie@nat.com
<input checked="" type="checkbox"/>			Jill	Hassel	jill@jill.com
<input checked="" type="checkbox"/>			John	Greenman	suzette@assessments24x7.com
<input checked="" type="checkbox"/>			Jane	Doe	Jane@jane.com

You then have two options, you can turn on the “View Reports” capability for these users if you did not turn this on when creating the Assessment Access Link, you can also switch user’s into a different group. You will need to click “Save” for both of these options when you are finished.

Editing Multiple Users

You can edit multiple users using the forms below. Just change the information you want and click the related Save button to save that information across all of your selected users.

Selected Users

Jane Doe

Jill Hassel

John Greenman

Natalie Cole

Editing Multiple Users

View Reports Allowed

Editing Multiple Users

Change Group to:

No Group ▼


ASSIGN NEW ASSESSMENTS TO AN ASSESSMENT USER

Click on “Manage Assessments”.

<input type="checkbox"/>		<input type="button" value="Edit User"/> <input type="button" value="Impersonate User"/> <input checked="" type="button" value="Manage Assessments"/> <input type="button" value="View Reports"/>	Smith	john@johnsmith.com			2016.03.23	
<input type="checkbox"/>			Jones	jack@jackjones.com			2016.03.22	
<input type="checkbox"/>			Robertson	beth@robertson.com			2016.01.14	

This will bring up options to assign new assessments to that particular assessment user. Once you have given access to new assessments you will want to notify your assessment user(s) to return to their account to complete the assessment(s). You can use the **“Send Reminders to Selected Users”** feature located on this page, or you can send an email from your own email making them aware of this addition and including the **“Return Link”** mentioned above.

DELETE AN ASSESSMENT USER

Click on the **“delete”** icon  next to the name. The delete icon is located to the right of the assessment users record. Once you click delete, the software will confirm that you wish to delete the record. **You can only delete assessment users that have not completed any assessments.**

Deleting an assessment user will add the assessment credit(s) back into your account.

<input type="checkbox"/>	Tools	Assessments	First Name	Last Name	E-mail	Link	Group	Created	
<input type="checkbox"/>			Sally	Smith	sally@smith.com			2016.04.12	
<input type="checkbox"/>			Jeff	Thompson	jeff@thompson.com			2016.04.12	
<input type="checkbox"/>			Sarah	Carter	sarah@carter.com			2016.04.12	
<input type="checkbox"/>			Brian	Harper	brian@harper.com			2016.04.12	
<input type="checkbox"/>			Jennifer	Carson	jennifer@carson.com			2016.04.12	
<input type="checkbox"/>			Walter	Brown	walter@brown.com			2016.03.16	
<input type="checkbox"/>			Ruth	Collins	ruth@collins.com			2015.12.23	
<input type="checkbox"/>			Greg	Williams	greg@williams.com			2015.12.22	

LOG INTO AN ASSESSMENT USER’S ACCOUNT

Click on **“Impersonate User”**. This will allow you to log into their assessment user admin panel. You might want to manage the observers, view data or review any aspect of their account.

<input type="checkbox"/>			Edit User	Smith	john@johnsmith.com			2016.03.23	
<input type="checkbox"/>			Impersonate User	Jones	jack@jackjones.com			2016.03.22	
<input type="checkbox"/>			Manage Assessments	Robertson	beth@robertson.com			2016.01.14	
<input type="checkbox"/>			View Reports						

SEND EMAILS AND REMINDERS TO ASSESSMENT USERS

You can send emails/reminders to your assessment users at any time. From the Assessment Users page, filter the data to list specific assessment users you wish to email on one screen. This can be done by selecting the group or searching for an individual assessment user. Click on the checkboxes next to the names you want to email. Scroll to the top of the table and click on the button labeled **“Send Reminders to Selected Users”**. This will bring up an email editor where you can add your desired copy. When finished, click on **“Send Email”**. This will send your email to the selected assessment users.

Download Reports Selected (.zip) **Send Reminders to Selected Users** Select (checkbox) the Users to include.

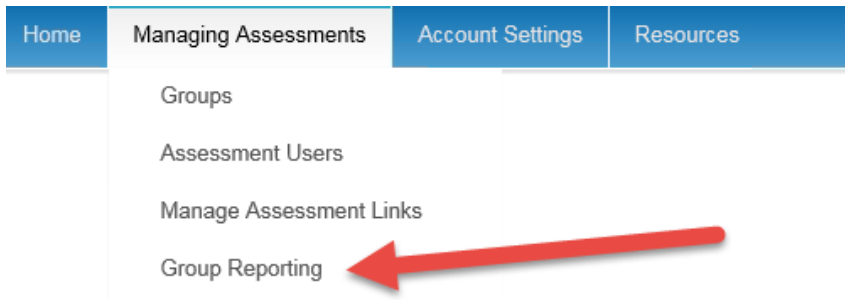
<input type="checkbox"/>	Tools	Assessments	First Name	Last Name	E-mail	Link	Group	Created
<input checked="" type="checkbox"/>			Sally	Smith	sally@smith.com			2016.04.12
<input checked="" type="checkbox"/>			Jeff	Thompson	jeff@thompson.com			2016.04.12
<input type="checkbox"/>			Sarah	Carter	sarah@carter.com			2016.04.12
<input checked="" type="checkbox"/>			Brian	Harper	brian@harper.com			2016.04.12
<input checked="" type="checkbox"/>			Jennifer	Carson	jennifer@carson.com			2016.04.12

Here are some reasons you might want to email your assessment users.

1. You want to resend the “Confirmation Email” they received when registering via one of your assessment access links.
2. You want to inform them they have new assessments they can take.
3. You want to send a general email about an upcoming training class or event.
4. You want to promote some products or services.

GROUP REPORTING

Group reporting varies depending on what assessments you are using. In most cases the report will produce a graph or series of graphs that show collaborative data from a selected group of assessment users. Each assessment has a different group report. To generate a group report, click on **“Group Reporting”** on the top menu.



Below are the steps to run a group report.

1. Filter by completion date (if desired).
2. Select the report you wish to run. For example ALL – DISC – Team Report.
3. Select a group (if desired).
4. Select an Assessment Link name (if desired)
5. Your filtering will bring up a list of names to the right.
6. Via the checkboxes next to the names, choose which people you wish to include for the group report. Then click on the **“Add Selected Users to Group Report”** button.

Group Reports

Select Report:

Completion Date Filter:
 to

Select User Group:

Select Assessment Access Link:

Quick Help

First, select the report you would like to generate from the list above. This will populate the grid on the right with the eligible users.

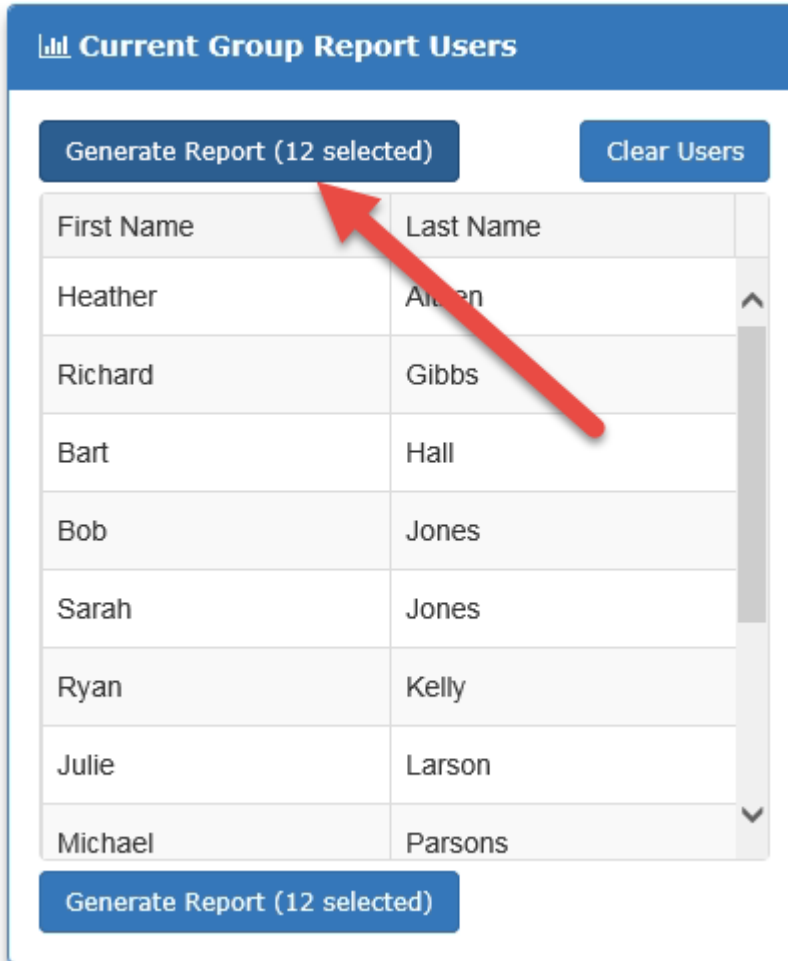
Next select the users from the grid you would like to add to the group report and click the "Add Selected Users to Group Report" button either above or below the grid.

When you are ready to generate your report click the Generate Report button on the top left of this page. This button will appear once you have added users to your report.

(12 records available for selection)

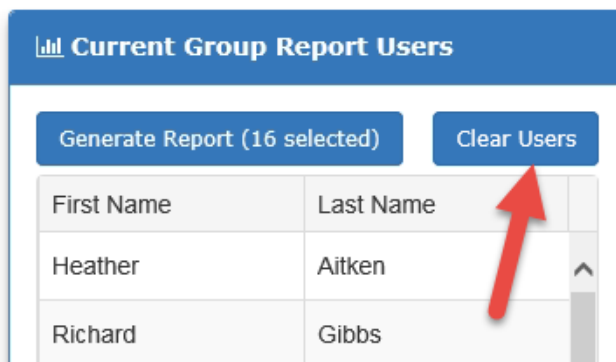
First name	Last Name	
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Heather	Aitken	<input checked="" type="checkbox"/>
Richard	Gibbs	<input checked="" type="checkbox"/>
Bart	Hall	<input checked="" type="checkbox"/>
Bob	Jones	<input checked="" type="checkbox"/>
Sarah	Jones	<input checked="" type="checkbox"/>
Ryan	Kelly	<input checked="" type="checkbox"/>
Julie	Larson	<input checked="" type="checkbox"/>
Michael	Parsons	<input checked="" type="checkbox"/>
Joe	Santos	<input checked="" type="checkbox"/>
Beth	Shumaker	<input checked="" type="checkbox"/>
Brian	Thompson	<input checked="" type="checkbox"/>
Vanessa	Tidd	<input checked="" type="checkbox"/>

Once you have selected the users, a grid will appear on the left of the screen showing your selected users. You can search for more users to add to the report, or if you are finished, click on **“Generate Report”** to view the group report.



Please allow up to 30 seconds for the group report PDF to be created.

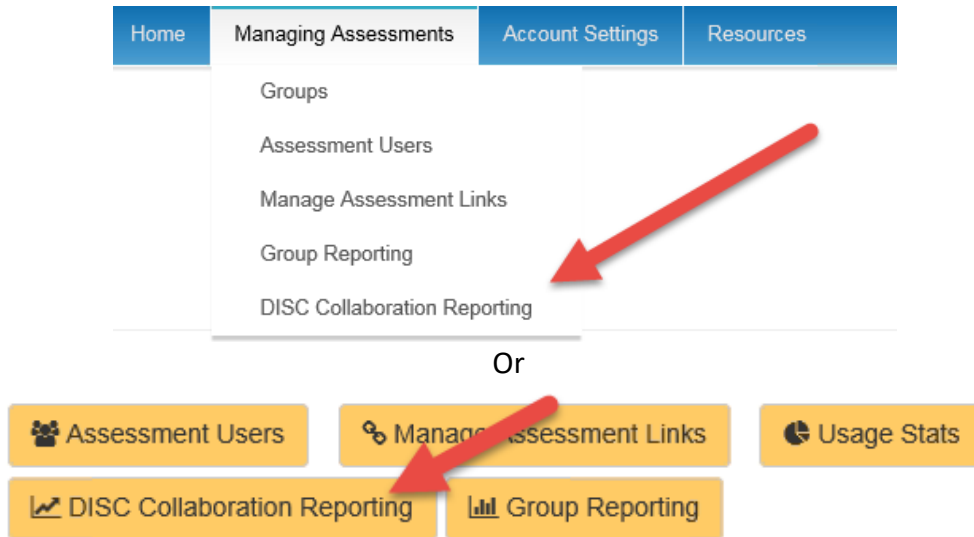
You can run as many group reports as you would like by repeating the above steps. To generate a new report, click on the **“Clear Users”** button and start again.



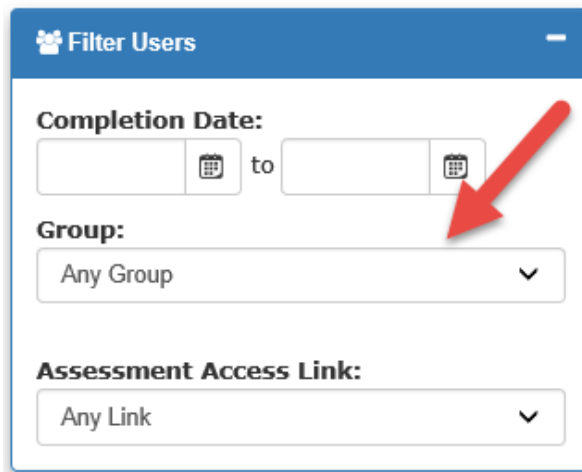
DISC Collaboration Reporting (if applicable)

The DISC Collaboration feature allows you to compare two individuals, side by side, in one report. There are also on screen percentages and team views when selecting more than two individuals.

You can access this page by either the top menu under “**Managing Assessments**” or the button on your home page.



You start by filtering using the Completion Date, Group and Assessment Access Link options. This will narrow down the list of assessments users as desired.



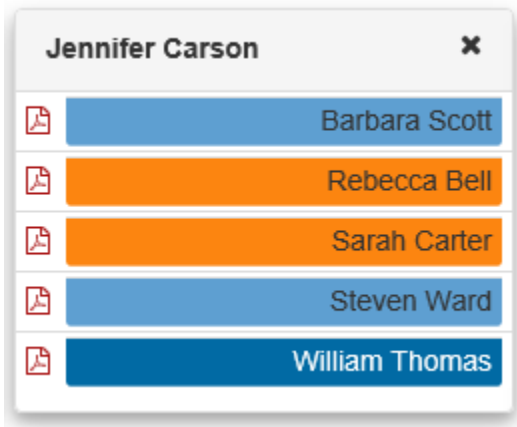
Directly below the filtering box, you will see a list of assessment users. You can click the checkboxes next to the names you want to include in your reporting.

You can select more than two if you want to see an entire team or department.

From there, you will be able to generate the individual DISC Collaboration Reports between Person A and Person B.

After completing your selections, click on the **“Add Selected Users to Report”** button.

On the right side of your screen, boxes will appear. In these boxes you will see the comparison for each of the selected assessment users. Each box is specific to one selected assessment user, with the additional names listed below.



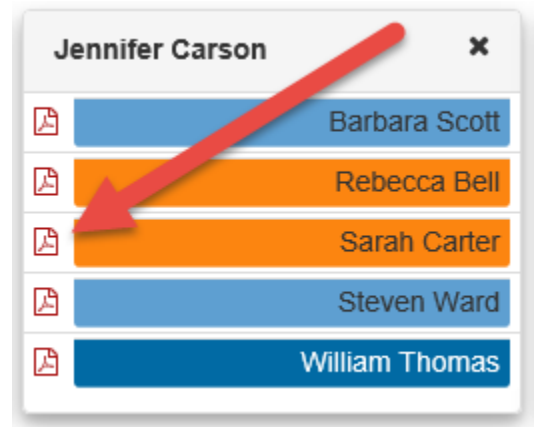
There will be multiple boxes depending on how many assessment users you selected.

To generate the Collaboration Report, find the match you would like to see and click the PDF icon in that column. It takes about 30 seconds to generate the PDF. Once complete, you can repeat the process for additional matches and reports.

A full screen view of the Collaboration page is on the next page of this instruction guide.

Add Selected Users to Report
(14 records available for selection)

First Name	Last Name	<input type="checkbox"/>
Rebecca	Bell	<input checked="" type="checkbox"/>
Jennifer	Carson	<input checked="" type="checkbox"/>
Betty	Carter	<input type="checkbox"/>
Sarah	Carter	<input checked="" type="checkbox"/>
Brian	Harper	<input type="checkbox"/>
Thomas	Perez	<input type="checkbox"/>
Barbara	Scott	<input checked="" type="checkbox"/>
Sally	Smith	<input type="checkbox"/>
Michael	Taylor	<input type="checkbox"/>
William	Thomas	<input checked="" type="checkbox"/>
Jane	Thompson	<input type="checkbox"/>
Steven	Ward	<input checked="" type="checkbox"/>
Greg	Williams	<input type="checkbox"/>
Anthony	Young	<input type="checkbox"/>



Filter Users

Completion Date:
 to

Group:
 Branch X

Assessment Access Link:
 Any Link

Add Selected Users to Report
 (8 records available for selection)

First Name	Last Name	<input type="checkbox"/>
Betty	Carter	<input type="checkbox"/>
Brian	Harper	<input type="checkbox"/>
Thomas	Perez	<input type="checkbox"/>

DISC Collaboration Comparison

Use the slider to view ranges. Reset Report

Low High

Barbara Scott

- Jennifer Carson
- Rebecca Bell
- Sarah Carter
- Steven Ward
- William Thomas

Jennifer Carson

- Barbara Scott
- Rebecca Bell
- Sarah Carter
- Steven Ward
- William Thomas

Rebecca Bell

- Barbara Scott
- Jennifer Carson
- Sarah Carter
- Steven Ward
- William Thomas

Sarah Carter

- Barbara Scott
- Jennifer Carson
- Rebecca Bell
- Steven Ward
- William Thomas

Steven Ward

- Barbara Scott
- Jennifer Carson
- Rebecca Bell
- Sarah Carter
- William Thomas

William Thomas

- Barbara Scott
- Jennifer Carson
- Rebecca Bell
- Sarah Carter
- Steven Ward

An additional feature on this page is the LOW to HIGH slider. You can move the points on this slider to show **only** matches desired in a particular range.

Low High

Barbara Scott

- Jennifer Carson
- Rebecca Bell
- Sarah Carter
- Steven Ward
- William Thomas

Jennifer Carson

- Barbara Scott
- Rebecca Bell
- Sarah Carter
- Steven Ward
- William Thomas

Rebecca Bell

- Barbara Scott
- Jennifer Carson
- Sarah Carter
- Steven Ward
- William Thomas

Account Settings

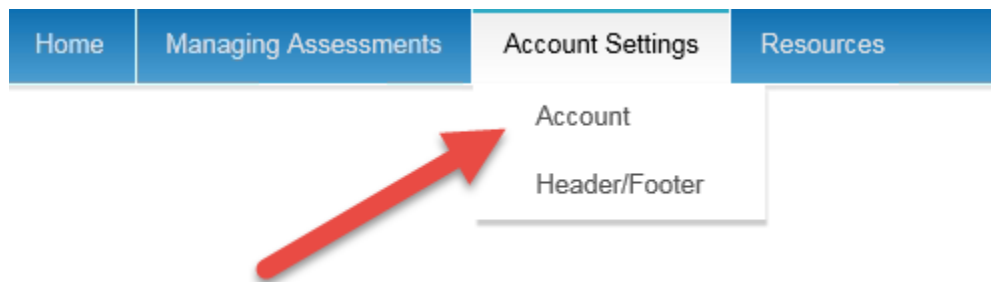
Account

This page consists of several options:

- Your **personal account information**
- Your credit card information for **assessment purchases** or **billable monthly usage**
- You can **upload a logo** for the cover page of reports

EDIT YOUR ACCOUNT INFORMATION

From the Account Settings tab, click on **Account**.



On this page, make any desired changes in the “Company Information” box and then click “**Save Company Information**”. **IMPORTANT – Your company name, phone number and website** will appear in the footers of all PDF reports. Please make sure this information is correct.

A screenshot of the 'Company Information' form. The form has a blue header with the title 'Company Information'. It contains several input fields: 'Company Name' (with 'Assessment Demo Company' entered), 'Administrator Name' (with 'Barbara Jackson' entered), 'Contact Email' (with 'barbara@jackson.com' entered), 'Address' (with '5787 Address' entered), 'City' (with 'San Diego' entered), 'Country' (with 'United States' selected in a dropdown), 'State' (with 'California' selected in a dropdown), and 'Zip' (with '99999' entered). At the bottom, there are 'Username' and 'Password' fields, both with 'demo' entered. A blue 'Save Company Information' button is at the bottom right. Two red arrows point to the 'Company Name' field and the 'Save Company Information' button.

Credit Card Information


If you would like your credit card information saved in our system and available when making assessment purchases, update all the fields and click **“Save Credit Card”**.

If you are a **“billable monthly client”** you will be required to keep this information up to date in order to use the assessments each month. If your card information is not current or valid, the system will not allow you to send out links or invite new people to complete assessments. Your credit card will be billed each month for usage the previous month.

If you are not a **“billable monthly client”**, you will purchase assessments as needed. It is also not required to save your credit card information. It can manually be entered at the time of each purchase. **By saving the information your ordering process will be slightly quicker.**

Credit Card Information

Save a default Credit Card to your profile below. This card can be used to order new credits and pay your monthly bill more easily.



Card Number
4444555566667777

Name on Card
Barbara Jackson

Expiration Date
Feb 2017

Security Code
1234

Address
5787 Address

City
San Diego

State
California

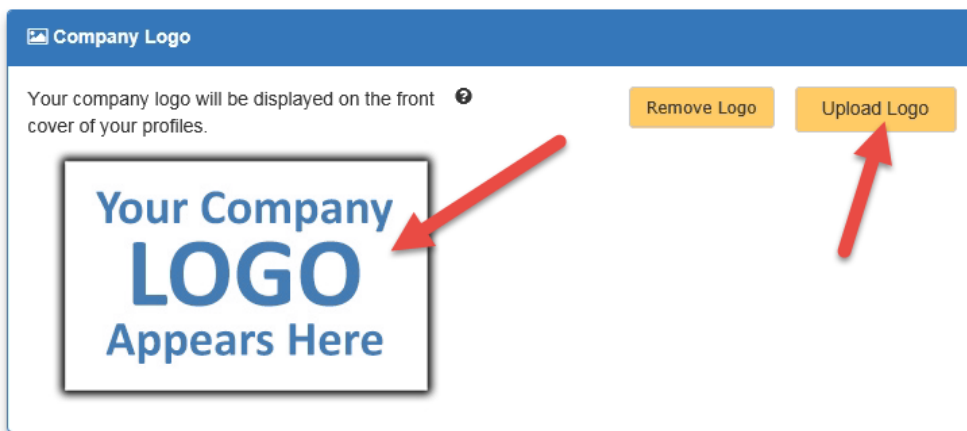
Zip
99999

Save Credit Card

UPLOAD A LOGO

You can upload your company logo, or your client’s logo, to be used on the cover pages of PDF reports. To do this, click on the “**Upload Logo**” button. Once this page loads, browse your computer to find the logo. A preview will appear on the screen.

To remove the logo, click on the “**Remove Logo**” button. You can also load up another logo which will overwrite the previous one. You can load .jpg, .png or .gif files. Please preview the logo. If the logo is excessive in size it will result in design distortion of the cover page of the report. You can upload a logo and then test the report output by regenerating a report for any assessment user. If you notice a modification to the logo is needed, you can upload a new one. Continue testing until you are satisfied with how your logo appears in the report.



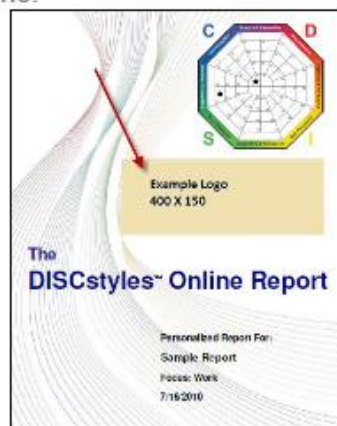
Logo Guidelines

Supported Image Formats: .JPG, .PNG, .GIF

Here are some examples of the sizes of logos that will work best on our PDF reports. You can choose a size that works best for you. Anything within a 500 pixel by 300 pixel dimension will work just fine.

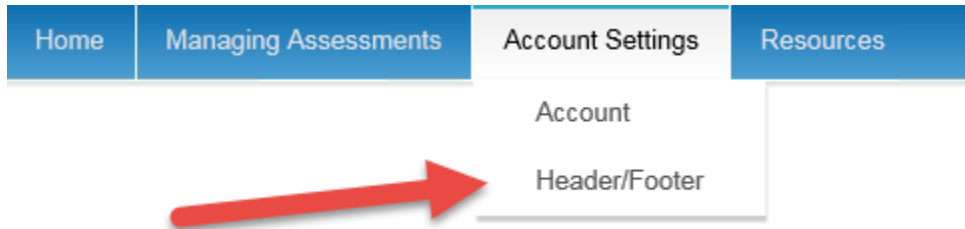
Suggested Sizes (in pixels):

- 500w X 200h
- 300w X 200h
- 400w X 150h
- 200w X 200h



Header and Footer


On this page you can create a custom design for your account. From the Account Settings tab, click on **Header/Footer**.

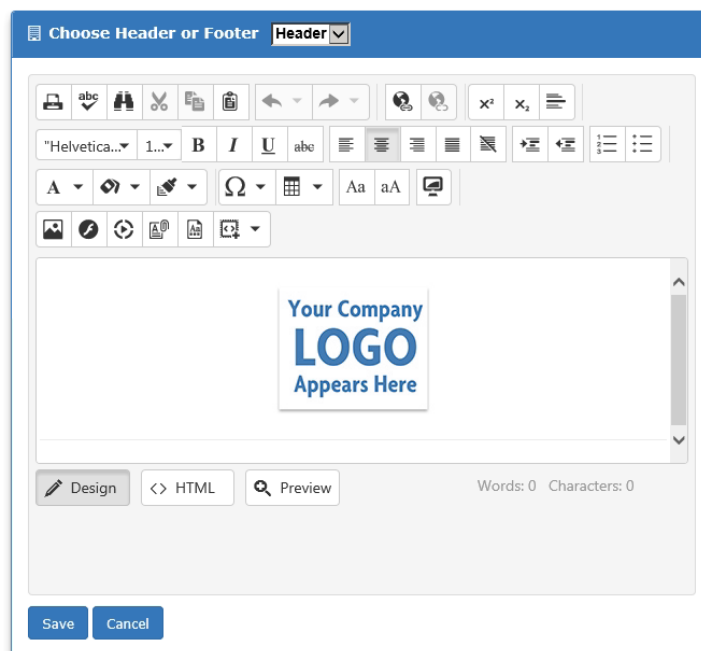


Here you can create a header and footer which will override the default design of the software. You can copy in HTML code which contains design elements from an existing website or you can create a custom design. Your design will appear for all your assessment users and their observers (if it is a 360 assessment).


ADD YOUR CUSTOM DESIGN

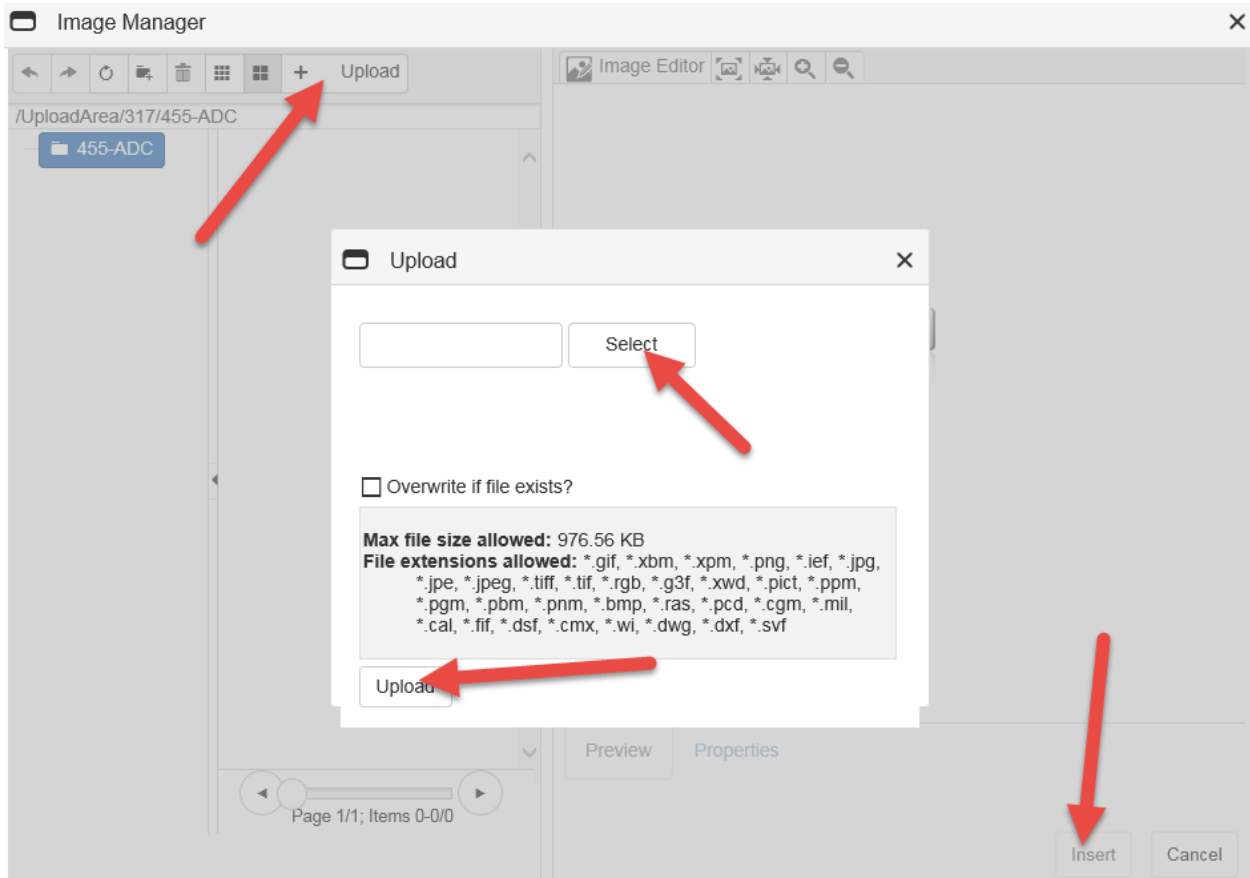
To add your custom design, choose either the **header** or **footer** from the drop down menu. Then add your design code and click save. To copy HTML code click on the **<> HTML** icon. This will turn the editor from design to code view. Copy and paste your code and click **save**.

To upload images to your design click on the  icon. This will allow you to browse your own computer and upload graphics for your design. Click on the upload button, find the image on your computer, scroll to the bottom and click "**Upload**". Once you upload the images into your image admin area you can "**Insert**" them into the appropriate places in the editor box. When you are finished, click the "**Save**" button. You can upload .jpg, .png or .gif files.



Details regarding uploading images

1. Click on 
2. Click on the **+ Upload** button
3. Select the files on your computer
4. Click the **"Upload"** button at the bottom of the screen to save the images to your library.
5. Once you have uploaded your images, select the image and click the **"Insert"** button. This will place your image in the design editor.



Resources

Additional Admin Resources

This area consists of several options. Depending on the site you are using, you might see options such as:

- Site instruction guide
- FAQ's
- Technical Support
- Access back to your home page
- Ability to Logout of your account

To access these resources, hover over the resources tab at the top of the screen to see the options that are available to you.

