New Account

First Time User Guide

New Account– First time user guide

This document is designed to help you get started with your new account. The steps provided are our recommendations based off thousands of account set ups. You are more than welcome to skip sections and move at your own pace.

We also offer one-on-one training via the phone/web. If you feel this will assist, we encourage you to contact us and set up a meeting. support@assessments.ws

For additional training resources please refer to the **"Virtual Tour of Your Account"** link found on your home page. This will provide you with video tutorials of each aspect of your account as well as step-by-step instructional guides.

We strive to make this an enjoyable and rewarding experience for your business. If we can make any modifications to our software to better meet your needs, please don't hesitate to ask.

For additional resources on our entire assessment catalog, pricing and additional resources feel free to contact us.

Welcome onboard!!!!

Thank you for setting up an account with us. This document can be used as an outline of where to start and what steps to take when becoming familiar with your new account. We are convinced once you get moving you will find this to be an extremely easy and beneficial system to support your assessment needs.

OUTLINE

1. **STEP 1 – General Account Settings**
2. **STEP 2 - Purchase assessment credits**
3. **STEP 3 - Personalize your reports with a custom logo**
4. **STEP 4 - Modify the site design**
5. **STEP 5 - Set up groups**
6. **STEP 6 - Set up "Assessment Access Links"**

STEP 1 - CHECK YOUR GENERAL ACCOUNT SETTINGS

When you first log into your account, check to verify that the information we used to set up your account was accurate.

1. Hover over the "**Account Settings**" option on the top menu.
2. Select "**Account**" in the drop down menu.
3. Review the information such as company name, contact, address, phone, website, username, password, etc.
4. Make any desired edits and then select the "**Save Company Information**" button.

In many cases the company name, phone number and website are merged into the footers of the reports. You will want to make sure this information is correct.

To view a video tutorial on the basics of modifying your account, click on the "**Virtual Tour**" link on your Home Page. You can also view screen shots and detailed instructions on this page.

STEP 2 – PURCHASE ASSESSMENT CREDITS

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 and a balance showing "unlimited".

Below are the details on how to purchase initial assessment credits from your home page.

1. Hover over the name of the assessment and click the "**Add Credits**" button. You can also click directly on the assessment name.
2. 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.
3. 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.
4. 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**".

To view a video tutorial on the basics of purchasing credits, click on the "**Virtual Tour**" link on your Home Page. You can also view screen shots and detailed instructions on this page.

STEP 3 – PERSONALIZE YOUR REPORTS WITH A CUSTOM LOGO

One of the many features we offer is the ability for you to upload a custom logo to the **cover pages of our assessment PDF reports**. This allows you to add personalized, custom branding to the reports you offer your clients and assessment users.

To upload a custom logo:

1. Hover over the "**Account Settings**" selection on your top menu.
2. Select "**Account**" in the drop down menu.
3. Select the "**Upload Logo**" button on the bottom of the page.
4. Once this page loads, browse your computer to find the logo. A preview will appear on the screen.
5. 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.

Logo requirements:

1. The logo should not exceed 500 pixels wide by 300 pixels tall. To see some example logo sizes click HERE.
2. Depending on the assessment you are using, the logo might look better on the cover page if it is smaller.
3. **Make sure to upload a logo that is not too big as that can result in additional page breaks and a distorted cover page.** The logo could be bigger than the dimensions of the cover page. This will force other elements down to another page.
4. The ideal logo size would be around 250 pixels X 250 pixels.

To view a video tutorial on uploading your logo, click on the "**Virtual Tour**" link on your Home Page. You can also view screen shots and detailed instructions on this page.

STEP 4 – MODIFY THE SITE DESIGN

Our software allows you to create a custom header (banner across the top) and footer. This design will be seen by your assessment users during every part of their assessment experience. This covers the initial registration page and assessment completion pages. They will always see your header and footer design. You will also see the design reflected in your own account admin site. By adding a custom banner you can match your company website and add yet another level of branding for your clients, employees and groups.

To modify your header and footer:

1. From the Account Settings tab on your top menu, click on **Header/Footer**.
2. 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).
3. Click on the  icon. This will allow you to browse your own computer and upload graphics for your design.
4. Click on the upload button, find the image on your computer, scroll to the bottom and click "**Upload**".
5. Once you upload the images into your image admin area you can "**Insert**" them into the appropriate places in the editor box.
6. Once you have loaded your image into the editor click on the "**Save**" button.

To view a video tutorial on modifying your site design, click on the "**Virtual Tour**" link on your Home Page. You can also view screen shots and detailed instructions on this page.

STEP 5 – SET UP GROUPS (OPTIONAL)

Another feature of the assessment software is your ability to create groups. The primary function of groups is to allow you to place your assessment users into categories for later ease of sorting and filtering and when you are generating group reports. **It is not required that you create groups**. When viewing your assessment users (via the "**Assessment Users**" link in the drop down menu of the "Managing Assessments selection on the top menu of your homepage), they are organized by the most recent dates entered. There are also a variety of sorting tools available on this page. If you are working with multiple companies, departments or engaged in a variety of personalized training, your best bet is to create groups. This will allow you to sort the list of assessment users to see everyone associated with a particular group.

To create groups:

1. From the Managing Assessments tab on your top menu, click on **GROUPS**.
2. Once on this page, click on "**CLICK HERE TO ADD A NEW GROUP**".
3. To add a new group to your list, type in the name of the group and click "**Update**".
4. To 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.
5. To 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.
6. When you create the "**Assessment Access Links**" you can assign each link to a particular group.

To view a video tutorial on setting up groups, click on the "**Virtual Tour**" link on your Home Page. You can also view screen shots and detailed instructions on this page.

STEP 6 – SET UP ASSESSMENT ACCESS LINKS

Assessment Access Links (AAL) are what you use to allow your assessment users to take assessments. **This is the heart of your Account Admin area**. When creating AALs you are asked a variety of questions. What assessment or combination of assessments will be assigned to this link? Will you turn on the 360 degree feedback option (if applicable)? Do you want each participant to immediately receive a PDF copy of the report, or will you be providing this to them at a later date? Do you want a PDF copy sent to a particular email address? Will you assign the link to a group? Will it have an expiration date? What do you want the confirmation email they will receive (verifying they have registered) to say, etc. You can create an unlimited number of links.

DO NOT CREATE AN INDIVIDUAL LINK FOR EACH ASSESSMENT USER. One link is designed to be used multiple times. For example, you might create one link for a particular company you are working with. You could have one link for each training session or training date.

When you complete the setup of each link you will provide that link to the assessment users via an email you send from your own email program. You also have the option of using our system to send invitations using the "**Send Assessments**" feature found on your home page.

Steps for setting up AAL:

1. From the Managing Assessments tab on your top menu, click on **Manage Assessment Links**.
2. To create a new Assessment Access Link click on "**CREATE A NEW ASSESSMENT ACCESS LINK**".
3. This brings up the variety of available options for setting up each link.
4. **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"
5. **Allow Observers** - Do you want to allow the 360 degree option? This would only be relevant if the assessment(s) are 360 degree compatible.
6. **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/event.

7. **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.
8. **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”.
9. **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.**
10. **Send Reports To** - Choose an email address where you would like the reports emailed. You do not need to specify an email. This is just an available feature you can take advantage of. If you wish to add multiple email addresses you can do so separated by a ;. Example: email@email.com;assessment@email.com.

11. **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.

12. **Expires On** - You can choose a date in which your assessment access link will expire. If an assessment user tries to use this link after this date it will become inactive.
13. **Choose Assessments** – Choose which assessment(s) you want to assign to the link. Check the box next to each assessment if you are using multiple. If you are using only one then click that one box.
14. When finished with the set up 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.

After clicking insert, 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 X of this document.

NOTE: if you have a link that is RED, that means it is no longer active. The reason for this one of the following. It has reached the expiration date. You have run out of assessment credits. 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.

To view a video tutorial on setting up Assessment Access Links, click on the "**Virtual Tour**" link on your Home Page. You can also view screen shots and detailed instructions on this page.