



Consultant Admin Account

Step 6 – Assessment Access Links

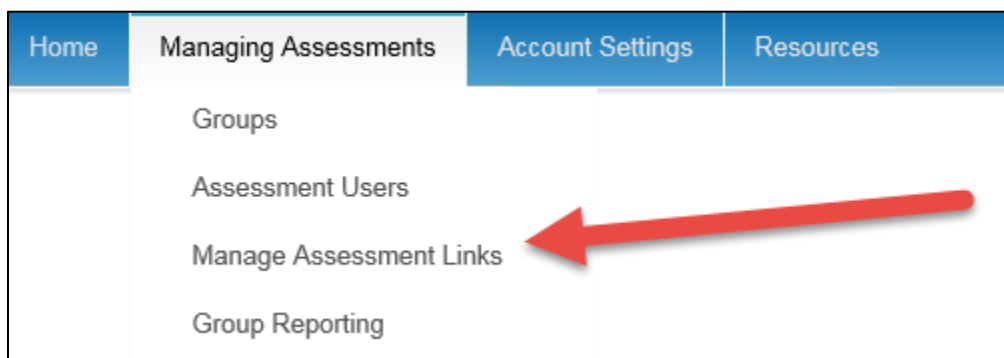
ASSESSMENT ACCESS LINKS

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					
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	
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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 ?

 1

2 ☐ **Allow observers ?**

☒ **Allow to view reports ? 3**

4 ☒ **Email a copy of the report to the end user ?**

Assign to a Group ?

5

Select a Language ?

6

7 **Confirmation Email ?** [EDIT / CONFIRM EMAIL](#)

Send reports to ?

8

9 **Report is Attached Email ?** [EDIT / CONFIRM EMAIL](#)

Expires on ? **10**

☐ DISC - Leadership (Available credits: 31) **11**

☐ DISC and Motivators (Available credits: 97)

☐ DISC Leadership and Learning Styles (Available credits: 49)

☒ DISC Self (Available credits: 78)

☐ EIQ (Available credits: 100)

☐ Judgment Employability (Available credits: 43)

☐ Learning Styles (Available credits: 100)

☒ Motivators (Available credits: 100)

☐ Platinum Rule (Available credits: 95)

☐ Sales IQ Plus (Available credits: 100)

☐ Social Styles I (Available credits: 100)

- 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.**
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. **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.
9. **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.
10. **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 this 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.
11. **Choose Assessments** – Choose which assessment(s) you want to assign to the link. Check the box next to each assessment.
12. 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 ?

10

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 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.

+ 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	
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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	