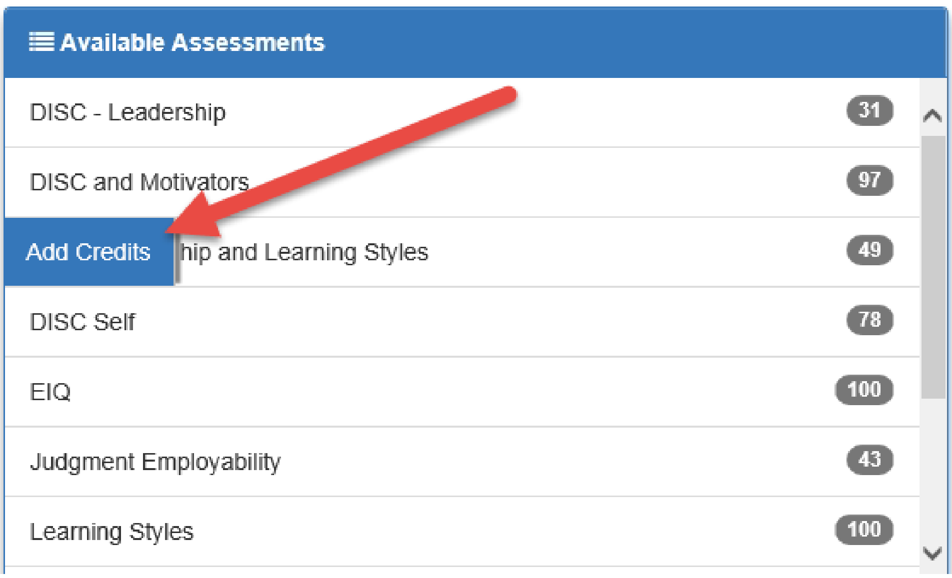
# Home – Assessment Account Initial Starting Page

## Purchasing Assessments

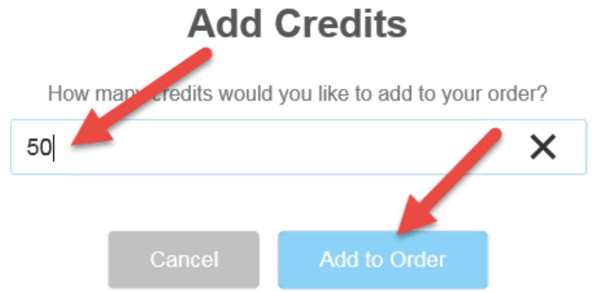
If your account has been set up to purchase assessments on a "**pay as you go**" basis, you will have access to buying them **directly from your home page**. If you are a "**billable monthly**" client, you will simply see the list of available assessments without a purchase option.

**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.

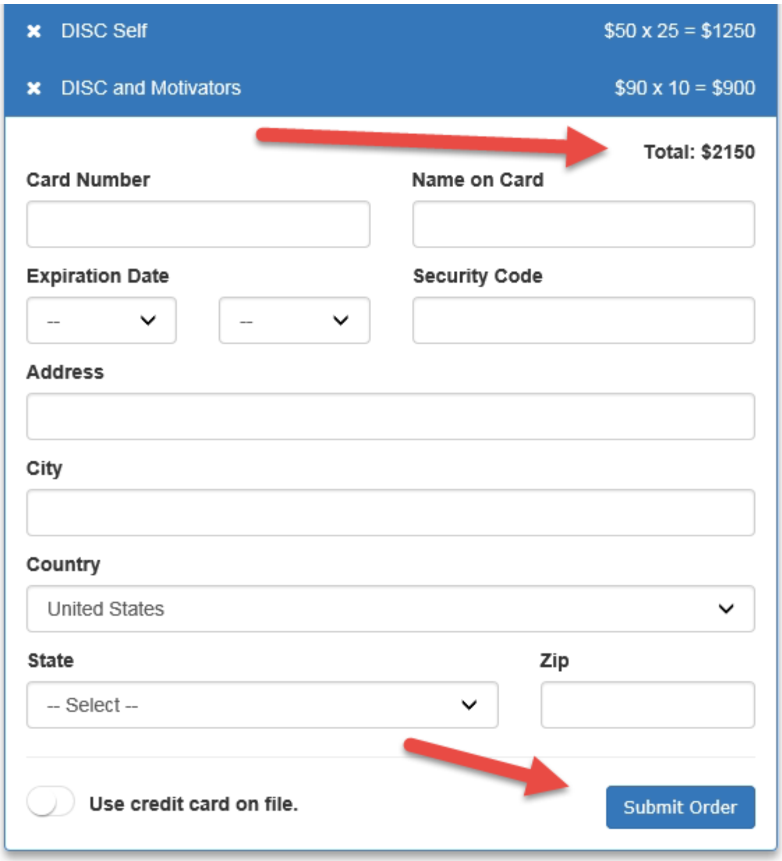
To **purchase credits**, hover over the name of the assessment and click the "**Add Credits**" button. You can also click directly on the assessment name.




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.




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**".

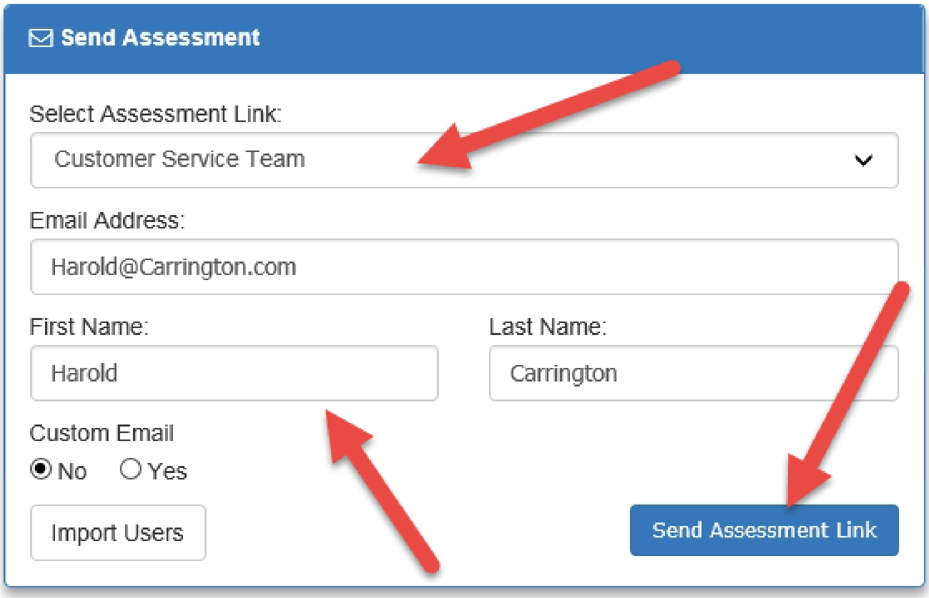
## SEND ASSESSMENTS

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 X of this document.

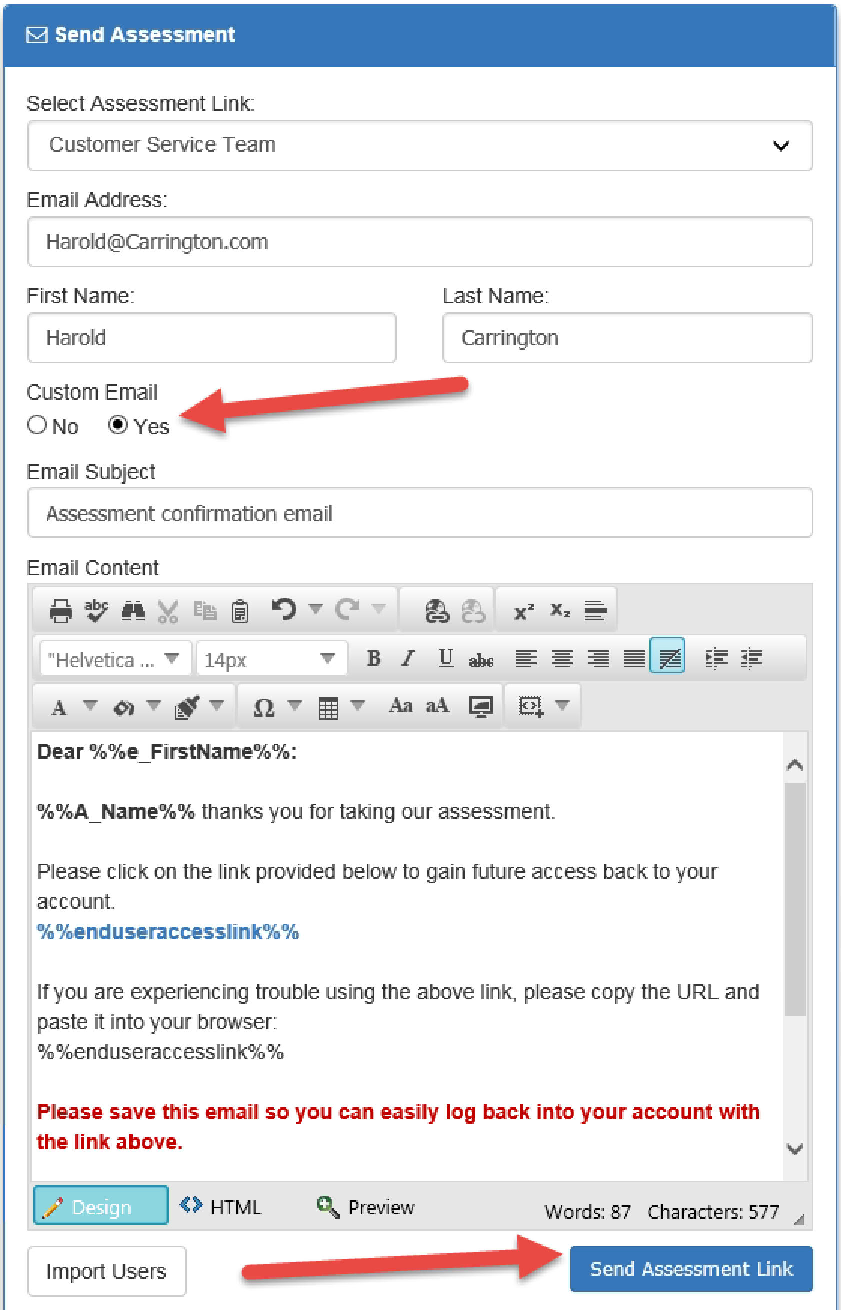
Once you have set up the details of your Assessment Access Link (page X of this document), you can use the manual inviting process found on your home page. Here are the steps.

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




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.

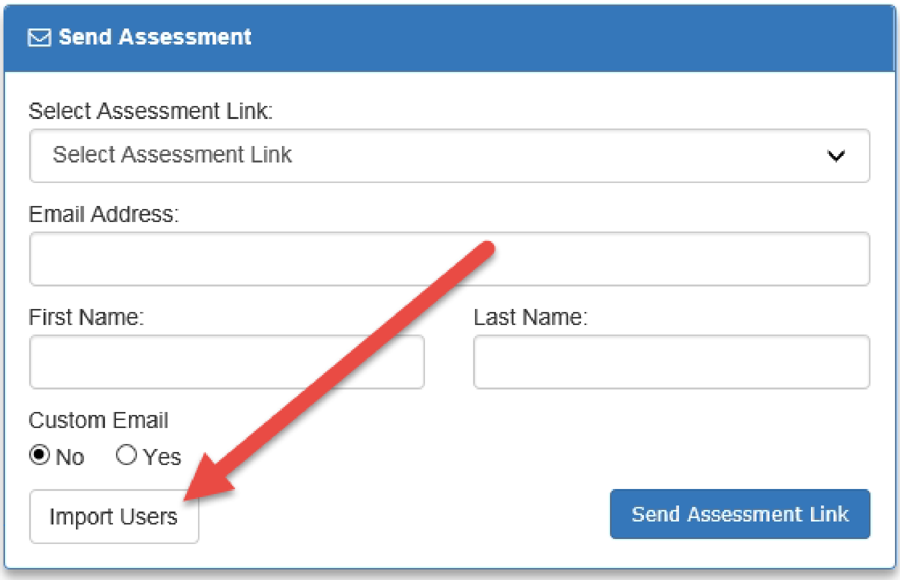
If you wish to edit the email for a particular person, you can click **YES** under "Custom Email". This will bring up an email editor where you can make your text adjustments. When finished, click the same "**Send Assessment Link**" button. **NOTE: you can modify this email for that particular assessment 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.




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, …**

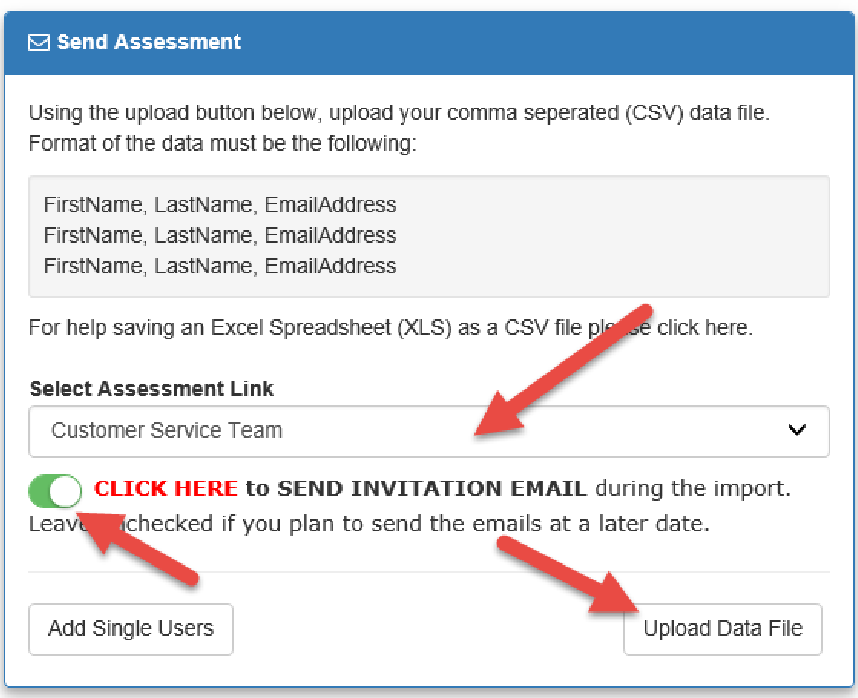
Another feature that is available to you on this “Send Assessment” option is to import a list of assessment users at one time. You have the option to then send the email upon import, or you can simply import and use the tools on the “Assessment Users” page to send the email at a later date.

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




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 the button to Green means YES)
3. Uploading your data file



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.

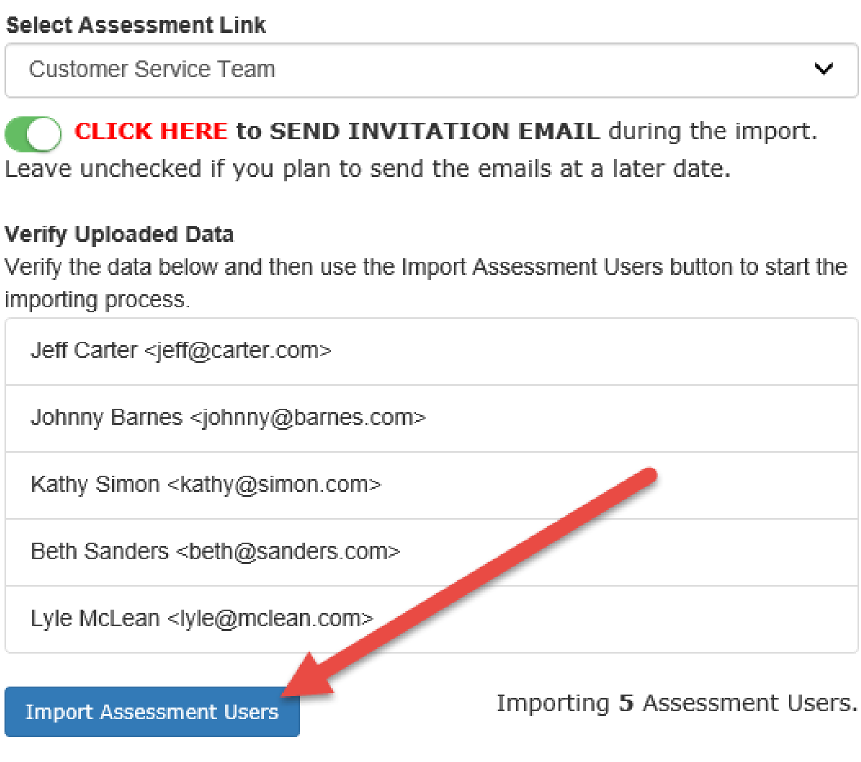
Example .TXT file

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
```

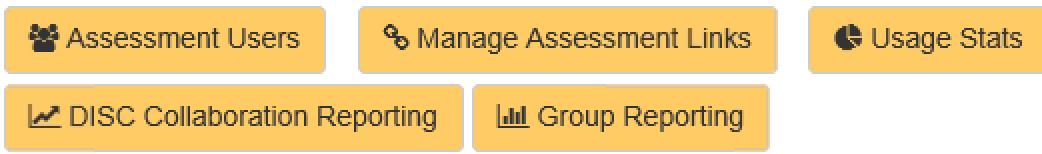
In the .TXT file the first name, last name and email address are separated by a comma.

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**”.



## 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 X 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 X of this document.

3. **Usage Stats** will provide you with statistics on purchases, assessments used and balance totals. The details are provided in page X of this document.

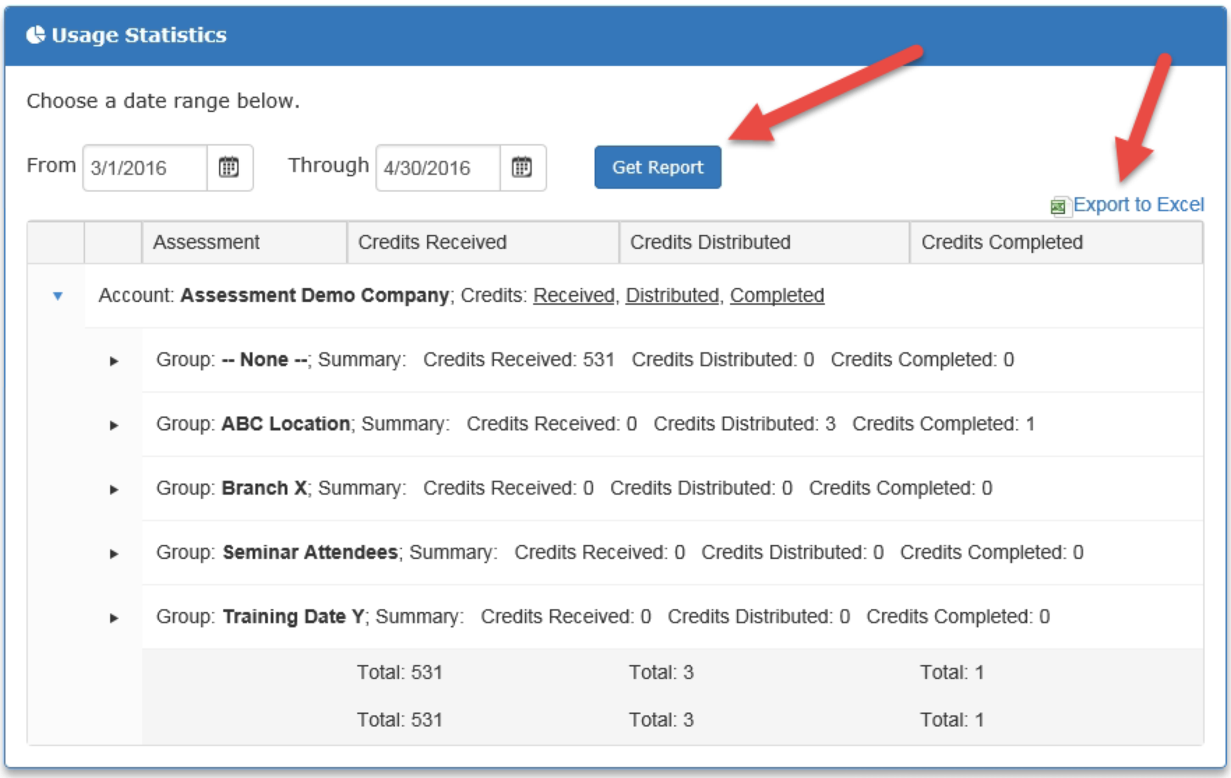
4. **Group Reporting** is where you can create collaborative reports based on selected users. These could be team reports, team wheels or data exports. The details are provided in page X of this document.

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 X 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.




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

## 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.