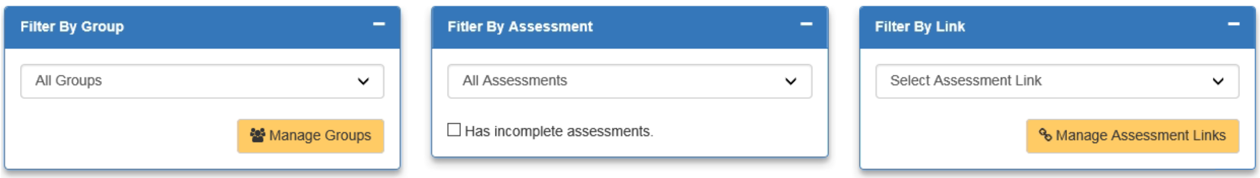
ASSESSMENT USERS

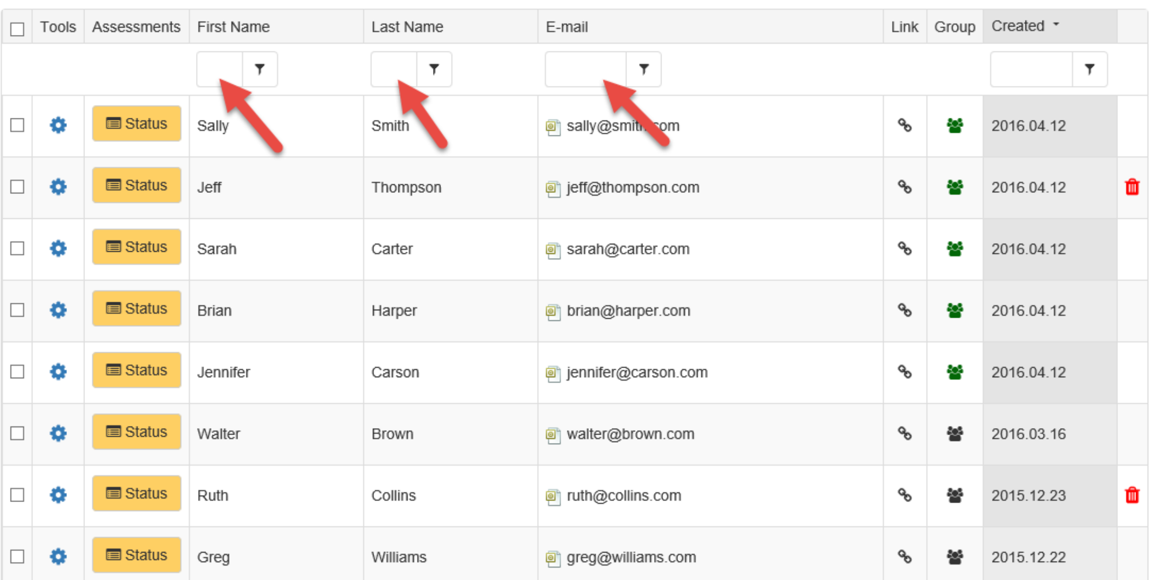
In this area, you can view and edit all your existing assessment users, send emails, monitor status and view report data.

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.

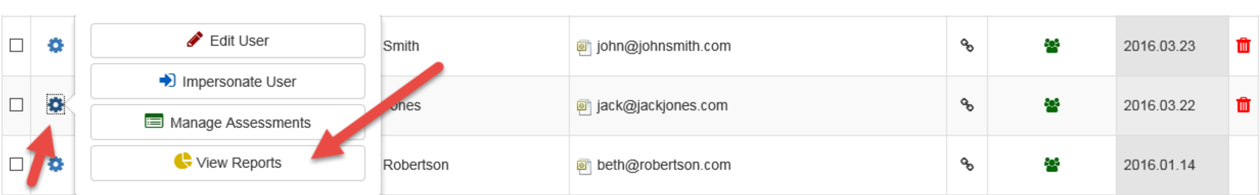


You also filter/search by typing in data in the column headers. There is a small icon to the right of the box in which you can choose to filter by a variety of criteria. For example “contains”, “starts with”, “ends with”, etc. You can also sort alphabetically by clicking on the column headers.

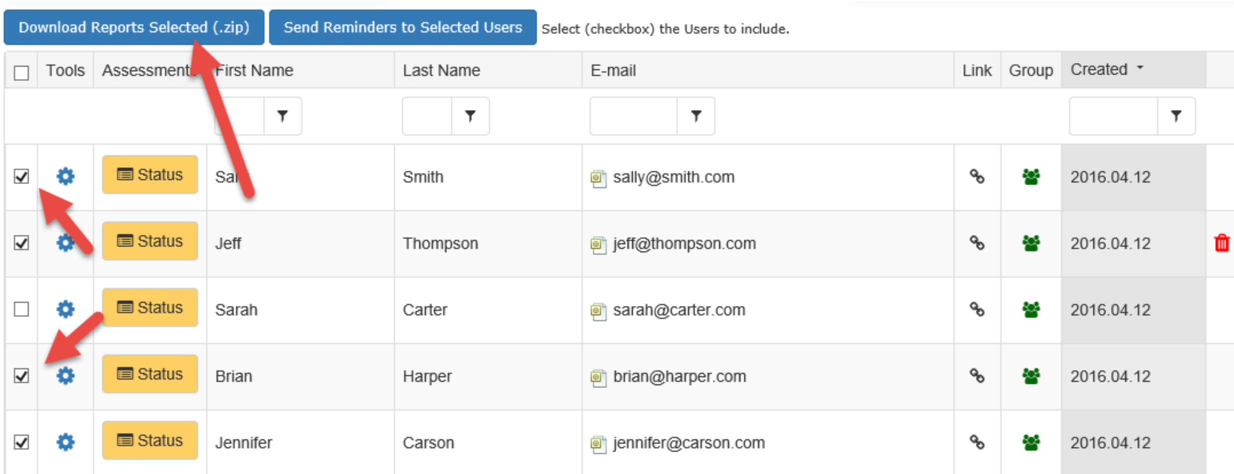


VIEW REPORTS

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.



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.

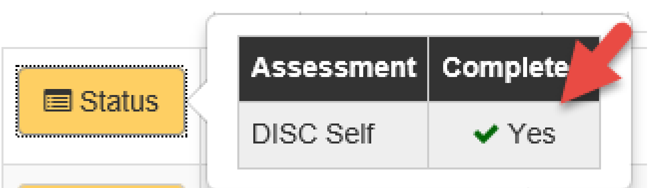


Once you have selected the users, click on the button that says "**Download Reports Selected (.zip)**". This will bring up a page that verifies your selections and allows you to click the final "**Download Reports**" button. A .zip file will be created that includes your selected users.

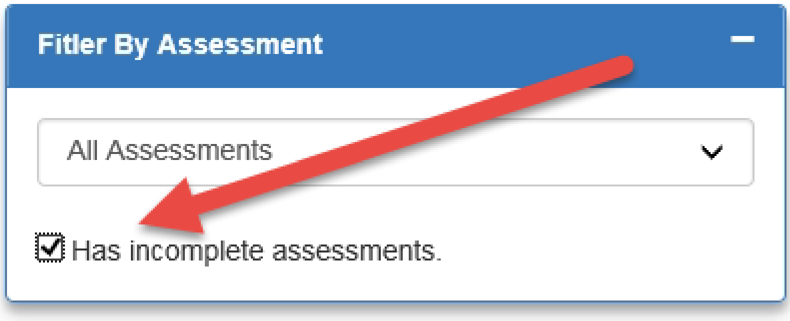
VIEW STATUS

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

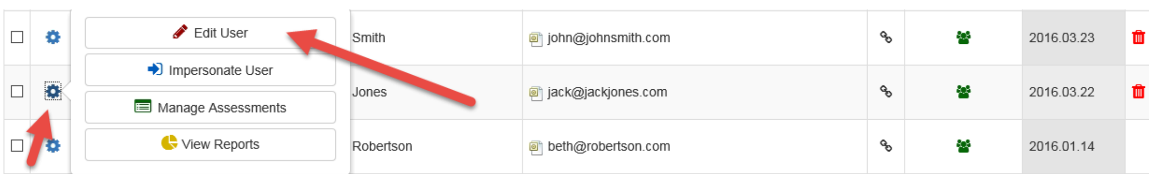
This will show you the status of the assigned assessments. Under the completed column you will see either a YES or NO.



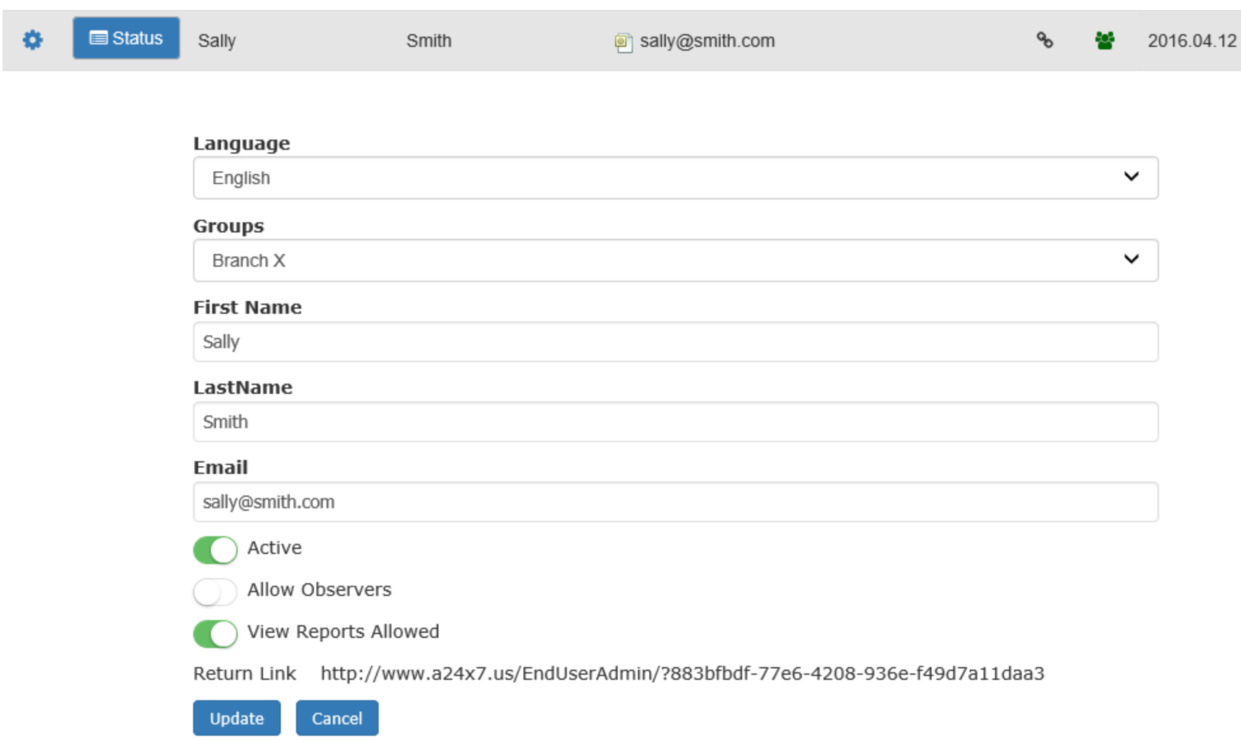
If you want to see all the assessment users who have incomplete assessments, use the filter option at the top of the page called "**Has incomplete assessments**". Click on the checkbox and the grid will **ONLY** show people who have not completed the assigned assessments.



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.

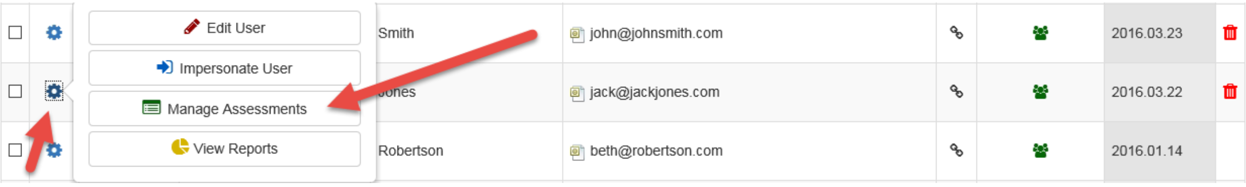


One important feature that is available is the "**Return Link**" found on this assessment user edit screen. If you get the request from an individual needing access back to finish an assessment or to simply go to their existing account, you can copy this link and email it to the individual. This link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

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

ASSIGN NEW ASSESSMENTS TO AN ASSESSMENT USER

Click on the gear icon next to the name you wish to modify. This will bring up the option to edit that particular individual. Click on "**Manage Assessments**".



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.

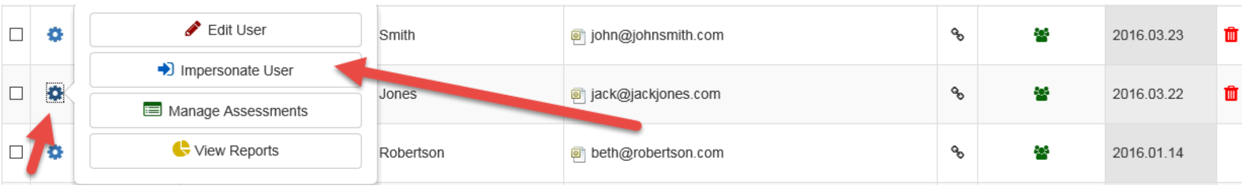
DELETE AN ASSESSMENT USER

Click on the "**delete**" icon next to the name. The delete icon is located to the right of the assessment user 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.**

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

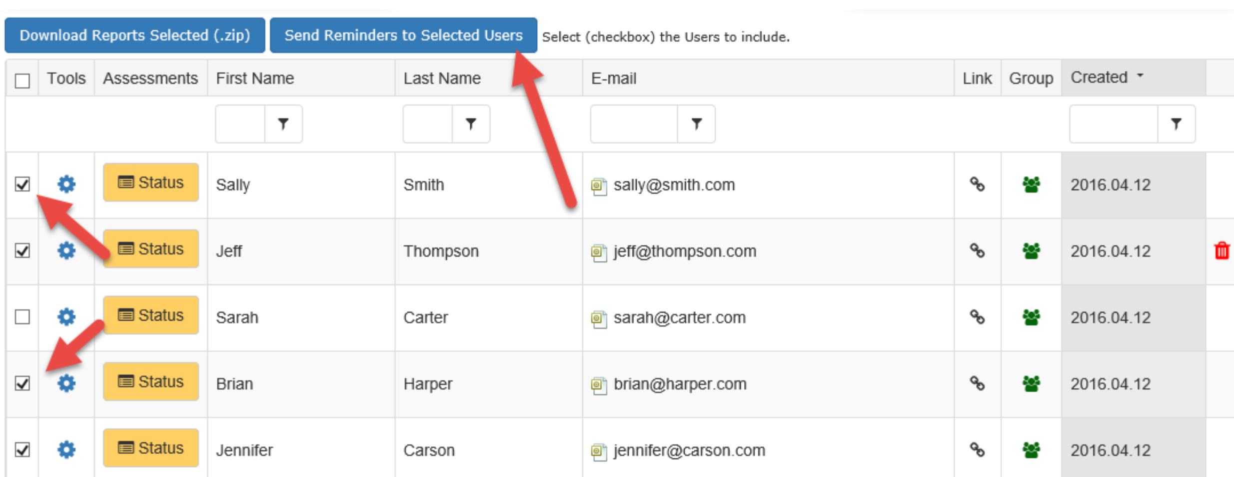
LOG INTO AN ASSESSMENT USER'S ACCOUNT

Click on the gear icon next to the name you wish to "impersonate". This will bring up the option to log into that particular individual. 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.



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.



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.