

## 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.

The image shows three separate filter panels. The first panel, 'Filter By Group', has a dropdown menu set to 'All Groups' and a 'Manage Groups' button. The second panel, 'Filter By Assessment', has a dropdown menu set to 'All Assessments' and a checkbox for 'Has incomplete assessments'. The third panel, 'Filter By Link', has a dropdown menu set to 'Select Assessment Link' and a 'Manage Assessment Links' button.

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.

	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.

The image shows a user list table. The columns are: Tools, Assessments, First Name, Last Name, E-mail, Link, Group, Created, and a delete icon. The 'Tools' column contains a gear icon. The 'Assessments' column contains a status icon. The 'First Name' column contains the names 'Smith', 'Jones', and 'Robertson'. The 'Last Name' column contains the names 'Smith', 'Jones', and 'Robertson'. The 'E-mail' column contains email addresses. The 'Link' column contains a link icon. The 'Group' column contains a group icon. The 'Created' column contains dates. The last column contains a trash icon. A red arrow points to the 'View Reports' option in the 'Tools' column for the first user (Smith).

## Consultant Admin Account – Assessment Users Instruction Guide

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 of assessment users with columns for First Name, Last Name, E-mail, Link, Group, and Created. Red arrows point from the text instructions to the 'Download Reports Selected (.zip)' button at the top left and to the checkboxes in the first column of the user list. The 'Status' button for Sally Smith is also highlighted with a red arrow.

	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

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.

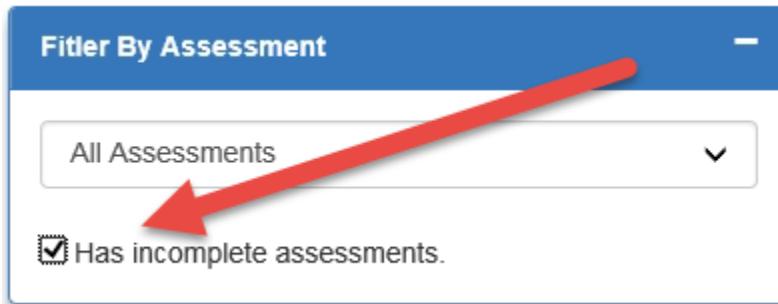
The screenshot shows a user profile for Sally Smith. A red arrow points to the 'Status' button next to her name.

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 an assessment detail for DISC Self. A red arrow points to the 'Complete' column, which displays 'Yes' with a green checkmark.

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.

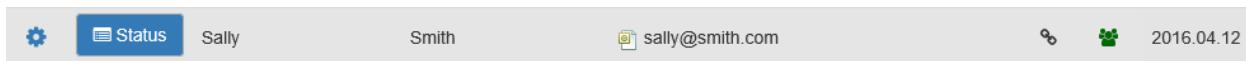


## EDIT AN ASSESSMENT USER

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**”.

		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	

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



<b>Language</b>	<input type="text" value="English"/>
<b>Groups</b>	<input type="text" value="Branch X"/>
<b>First Name</b>	<input type="text" value="Sally"/>
<b>Last Name</b>	<input type="text" value="Smith"/>
<b>Email</b>	<input type="text" value="sally@smith.com"/>
<input checked="" type="checkbox"/> Active	
<input type="checkbox"/> Allow Observers	
<input checked="" type="checkbox"/> View Reports Allowed	

Return Link <http://www.a24x7.us/EndUserAdmin/?883bfbd-77e6-4208-936e-f49d7a11daa3>

**Update**    **Cancel**

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**”.



A screenshot of a web-based application interface for managing assessment users. On the left, there is a vertical toolbar with icons for 'Edit User', 'Impersonate User', 'Manage Assessments' (which is highlighted with a red arrow), and 'View Reports'. To the right is a table listing three users: Smith, Jones, and Robertson. Each row in the table includes a checkbox, a gear icon (highlighted with a red arrow), an email link, a status icon, a creation date, and a delete icon.

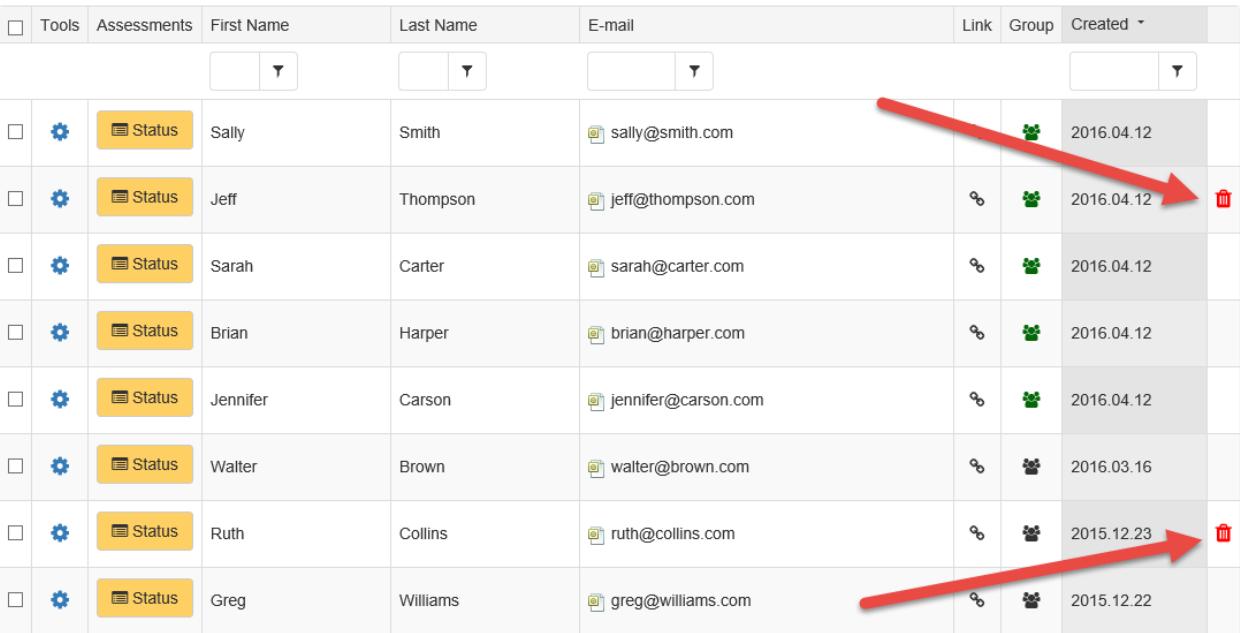
		 Edit User	Smith	<a href="#">john@johnsmith.com</a>			2016.03.23	
		 Impersonate User	Jones	<a href="#">jack@jackjones.com</a>			2016.03.22	
		 Manage Assessments	Robertson	<a href="#">beth@robertson.com</a>			2016.01.14	

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 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.**

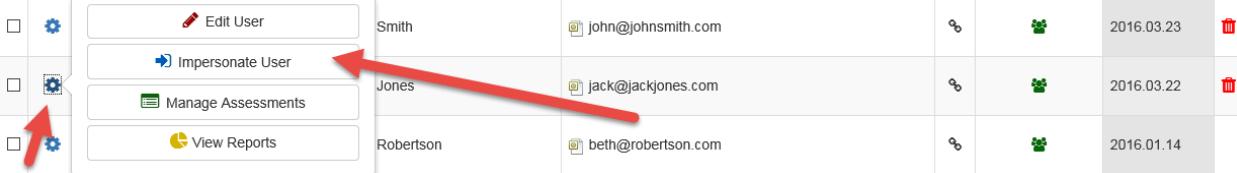


A screenshot of the same web-based application interface for managing assessment users. The table now shows eight users: Sally, Jeff, Sarah, Brian, Jennifer, Walter, Ruth, and Greg. The 'Manage Assessments' column has been removed. A red arrow points to the delete icon in the last row (Greg's entry).

		 Status	Sally	Smith	<a href="#">sally@smith.com</a>		2016.04.12	
		 Status	Jeff	Thompson	<a href="#">jeff@thompson.com</a>			2016.04.12
		 Status	Sarah	Carter	<a href="#">sarah@carter.com</a>			2016.04.12
		 Status	Brian	Harper	<a href="#">brian@harper.com</a>			2016.04.12
		 Status	Jennifer	Carson	<a href="#">jennifer@carson.com</a>			2016.04.12
		 Status	Walter	Brown	<a href="#">walter@brown.com</a>			2016.03.16
		 Status	Ruth	Collins	<a href="#">ruth@collins.com</a>			2015.12.23
		 Status	Greg	Williams	<a href="#">greg@williams.com</a>			2015.12.22

## LOG INTO AN ASSESSMENT USER'S ACCOUNT

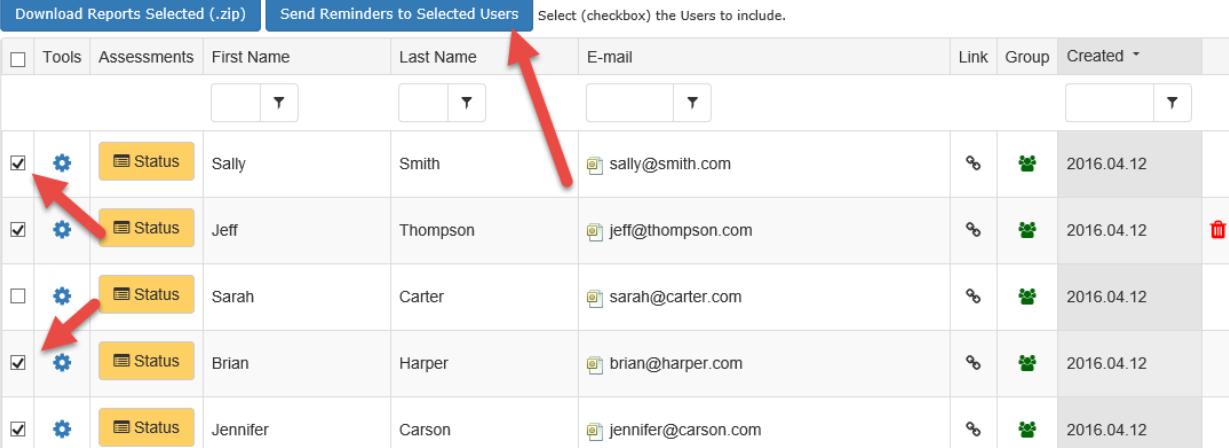
Click on the gear icon  next to the name you wish to “impersonate”. This will bring up the option to log into that particular individual. Click on “**Impersonate User**”. This will allow you to log into their assessment user admin panel. You might want to manage the observers, view data or review any aspect of their account.



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

## 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.



<a href="#">Download Reports Selected (.zip)</a>		<a href="#">Send Reminders to Selected Users</a>		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.