

## 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.

A screenshot of a web-based application titled "Available Assessments". The list contains the following items:

Assessment Name	Balance
DISC - Leadership	31
DISC and Motivators	97
<b>Add Credits</b> <b>Hip and Learning Styles</b>	49
DISC Self	78
EIQ	100
Judgment Employability	43
Learning Styles	100

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.

A screenshot of a modal dialog box titled “Add Credits”. It contains the following text and controls:

How many credits would you like to add to your order?

X

Cancel Add to Order

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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.

The image shows a credit card payment form. At the top, there are two line items: "DISC Self" with a quantity of 25 and a price of \$50 x 25 = \$1250, and "DISC and Motivators" with a quantity of 10 and a price of \$90 x 10 = \$900. A red arrow points from the right side of the page towards the "Total: \$2150" label. Below the line items, there are fields for "Card Number", "Name on Card", "Expiration Date", "Security Code", "Address", "City", "Country" (set to United States), "State" (dropdown menu with "Select" option), and "Zip". At the bottom left is a toggle switch labeled "Use credit card on file." and at the bottom right is a blue "Submit Order" button.

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**”.

The image shows the same credit card payment form, but it includes a "Current credit card on file:" section. It displays a sample Visa card with the number 4444 \*\*\*\* \* 7777, the name BARBARA JACKSON, and an expiration date of 02/17. A red arrow points from the right side of the page towards the "Use credit card on file." toggle switch. Another red arrow points from the right side of the page towards the "Submit Order" button.

### 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.

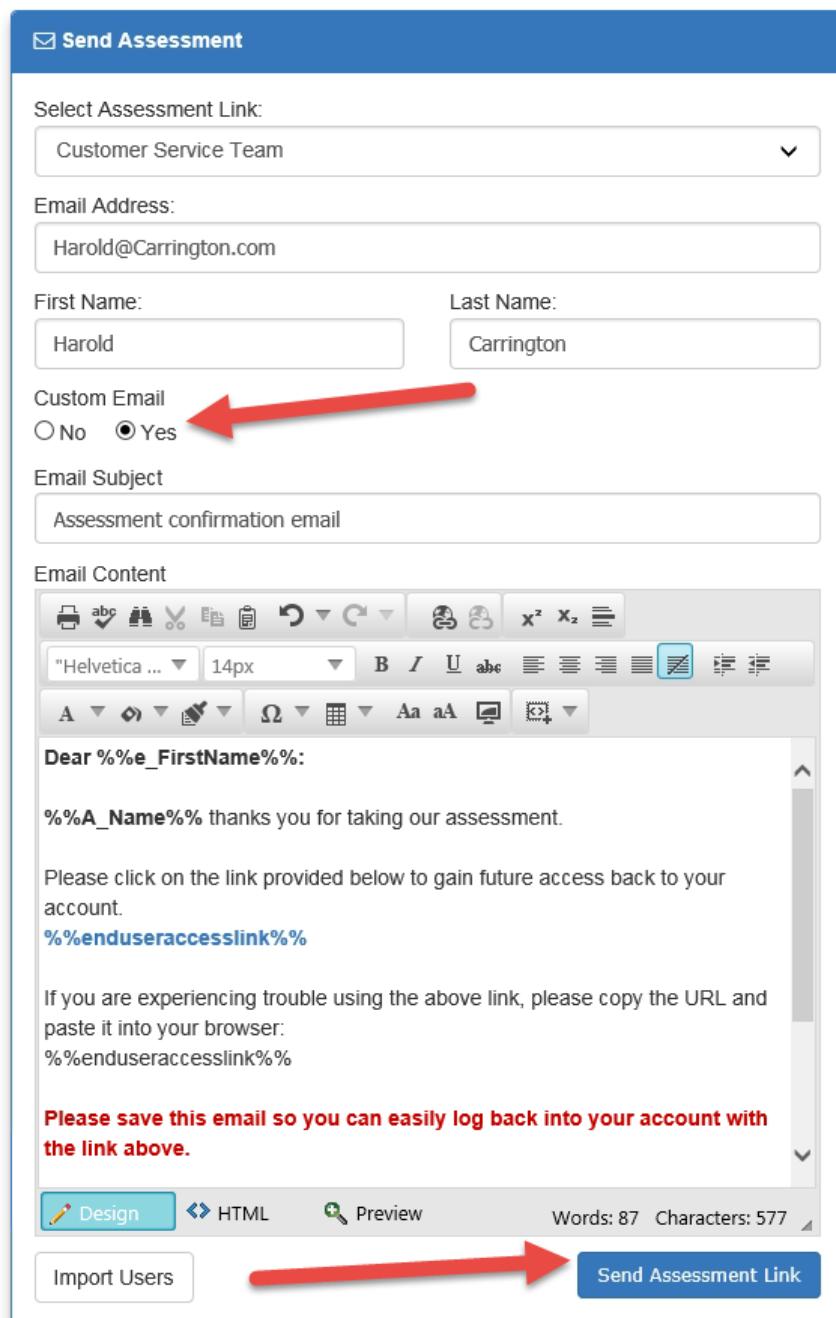
1. Select the Assessment Link
2. Type in the email address of the assessment user
3. Type in the first name and last name of the assessment user
4. Decide if you want to modify the default email (originally created during step 7 of setting up your assessment access link)
5. Click the “**Send Assessment Link**” button

The screenshot shows a 'Send Assessment' dialog box. At the top, it says 'Select Assessment Link:' followed by a dropdown menu containing 'Customer Service Team'. A large red arrow points to this dropdown. Below it is an 'Email Address:' field containing 'Harold@Carrington.com'. To the right of the email field are 'First Name:' and 'Last Name:' fields, both containing 'Harold' and 'Carrington' respectively. Another red arrow points to the 'First Name:' field. At the bottom left is a 'Custom Email' section with 'No' and 'Yes' radio buttons, where 'No' is selected. A third red arrow points to the 'Custom Email' section. At the bottom right is a blue 'Send Assessment Link' button, which also has a red arrow pointing to it.

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.

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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.

The screenshot shows a blue header bar with the text "Send Assessment". Below it is a form with fields for "Select Assessment Link" (a dropdown menu), "Email Address" (a text input field), "First Name" and "Last Name" (text input fields side-by-side), and "Custom Email" (radio buttons for "No" and "Yes"). At the bottom left is a blue "Send Assessment Link" button, and at the bottom center is a white "Import Users" button with a red arrow pointing to it.

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

The screenshot shows the same "Send Assessment" dialog box. It includes instructions for uploading a CSV file, a "Select Assessment Link" dropdown (set to "Customer Service Team"), and a toggle switch labeled "CLICK HERE to SEND INVITATION EMAIL during the import." A red arrow points to the green toggle switch, another red arrow points to the "Upload Data File" button at the bottom right, and a third red arrow points to the "Add Single Users" button at the bottom left.

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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	<a href="mailto:email@email.com">email@email.com</a>
2	PersonBFirst	PersonBLast	<a href="mailto:email@email.com">email@email.com</a>
3	PersonCFirst	PersonCLast	<a href="mailto:email@email.com">email@email.com</a>
4	PersonDFirst	PersonDLast	<a href="mailto:email@email.com">email@email.com</a>
5	PersonEFirst	PersonELast	<a href="mailto:email@email.com">email@email.com</a>
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**”.

### Select Assessment Link

Customer Service Team



**CLICK HERE** to SEND INVITATION EMAIL during the import.

Leave unchecked if you plan to send the emails at a later date.

### Verify Uploaded Data

Verify the data below and then use the Import Assessment Users button to start the importing process.

Jeff Carter <jeff@carter.com>

Johnny Barnes <johnny@barnes.com>

Kathy Simon <kathy@simon.com>

Beth Sanders <beth@sanders.com>

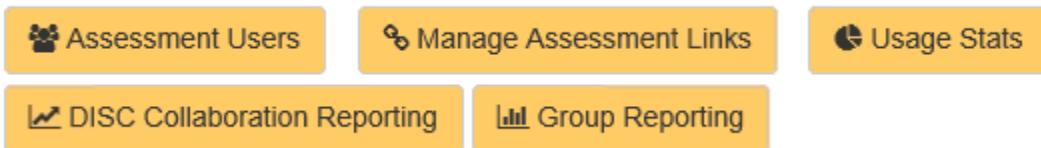
Lyle McLean <lyle@mclean.com>

**Import Assessment Users**

Importing 5 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.

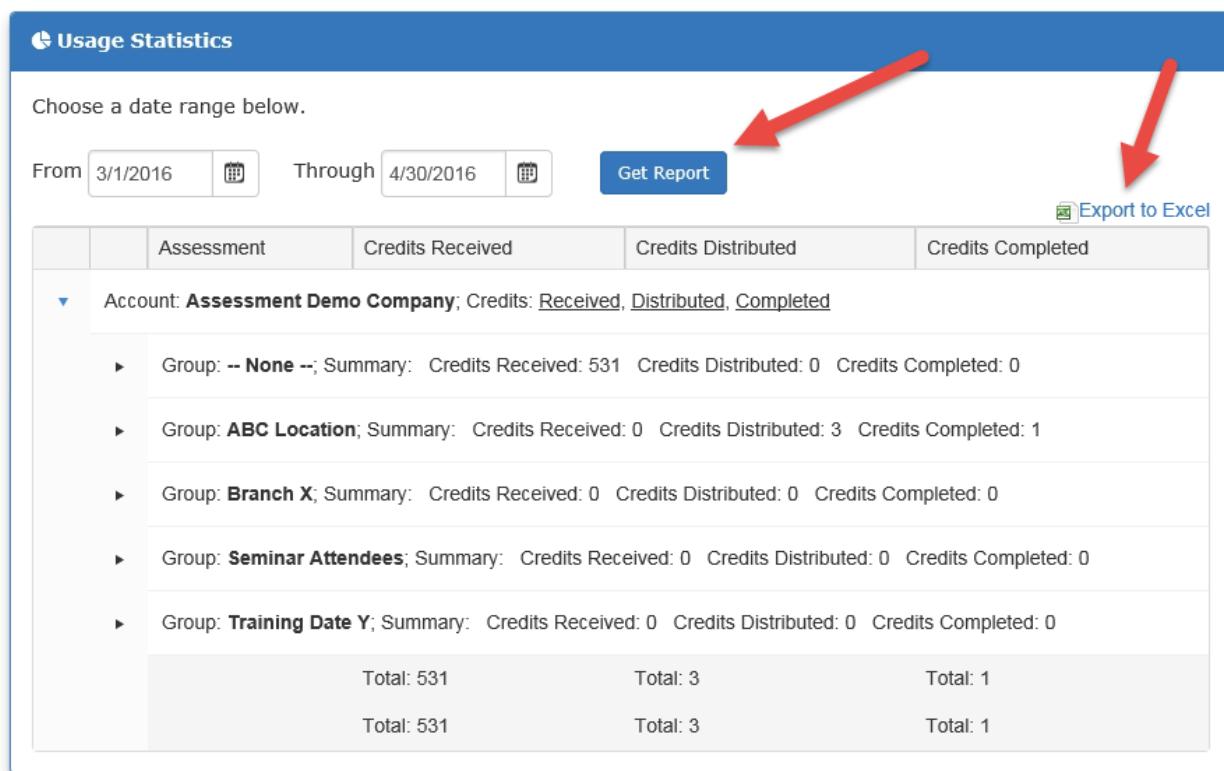


1. **Assessment Users** takes you to the list of people who have completed assessments or have been invited to complete an assessment(s). This is where you can view completion status, make edits, view PDF reports, assign additional assessments, etc. The details are covered in page X of this document.
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.



The screenshot shows the 'Usage Statistics' page. At the top, there is a date range selector with 'From' set to '3/1/2016' and 'Through' set to '4/30/2016'. Below the date range is a 'Get Report' button. To the right of the report button is a red arrow pointing towards the 'Export to Excel' button. The 'Export to Excel' button is located at the bottom right of the page. The main content area displays a table with columns: Assessment, Credits Received, Credits Distributed, and Credits Completed. A dropdown menu is open under the 'Assessment' column, showing details for 'Assessment Demo Company' with five groups listed: '-- None --', 'ABC Location', 'Branch X', 'Seminar Attendees', and 'Training Date Y'. Each group has a summary of credits received, distributed, and completed. At the bottom of the table, there are three rows of totals: Total: 531, Total: 3, Total: 1.

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



This screenshot shows a detailed breakdown for the account 'Assessment Demo Company'. A red arrow points to the 'Received' link in the 'Credits Received' column of the table. The table has columns: Assessment, Credits Received, Credits Distributed, and Credits Completed. The 'Assessment' column contains a dropdown menu for 'Assessment Demo Company' with options: 'Received', 'Distributed', and 'Completed'. The 'Credits Received' column shows a total of 531. The 'Credits Distributed' column shows a total of 3. The 'Credits Completed' column shows a total of 1.

### 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.

#### Resource Center

-  **Virtual Tour Of Your Account**  
A quick overview of your account
-  **DISC Trainer Materials**  
Password is **peoplesmarts**
-  **DISC Certification**  
DISC Practitioner Certification
-  **Marketing One-Sheets**  
Download one-sheets
-  **Sample Reports**  
Download Sample PDF reports
-  **Demo Assessments**  
Use them for personal demos
-  **Webinars**  
Previously recorded webinars
-  **Platinum Rule Trainer Materials**  
Password is **peoplesmarts**
-  **Sales IQ Plus Trainer Materials**  
Password is **siqtraining**
-  **EIQ (Emotional Intelligence) Trainer Materials**  
Password is **eiqtraining**

- If this is your first time using our system, please "[click here](#)" to download our recommendations for getting started. The full site instruction guide is located on the top menu under resources.**
- Give step by step instructions to your End Users on how to engage in the 360 component of the software. [Click here](#) to download a PDF which you can attach to your invitation emails.**