

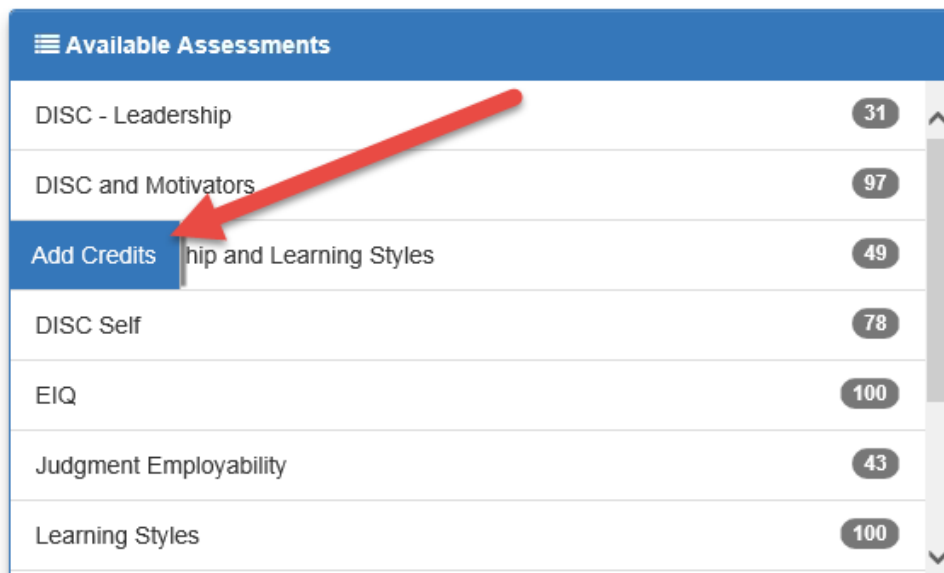
## Home – Assessment Account Initial Starting Page

### 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.

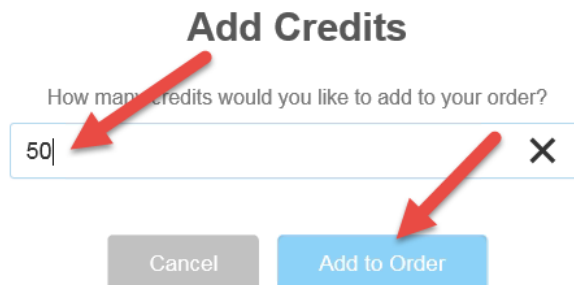
**This is also the screen where you can get a quick view of your balance for each assessment.** If you are a billable monthly client you will see “Unlimited” as the balance, if not, you will see a number. If that number reaches 0, you will not be able to invite new assessment users until you bring this 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.



Available Assessments		
DISC - Leadership		31
DISC and Motivators		97
Add Credits Discipline and Learning Styles		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.



**Add Credits**

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

50

Cancel Add to 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.

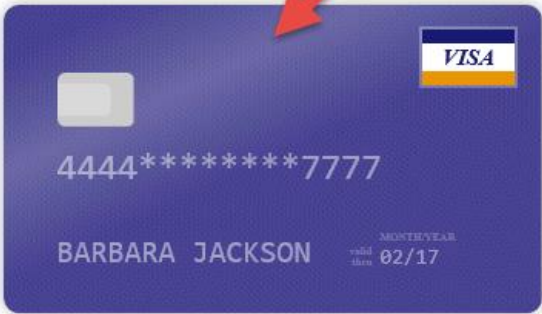
× DISC Self \$50 x 25 = \$1250  
× DISC and Motivators \$90 x 10 = \$900  
**Total: \$2150**

Card Number  Name on Card   
Expiration Date  --  -- Security Code   
Address   
City   
Country  United States  
State  -- Select -- Zip   
☐ Use credit card on file. **Submit Order**

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**”.

× DISC Self \$50 x 25 = \$1250  
**Total: \$1250**

Current credit card on file:



☒ Use credit card on file. **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

The screenshot shows a web form titled "Send Assessment" with a blue header bar. The form contains the following fields and controls:

- Select Assessment Link:** A dropdown menu with "Customer Service Team" selected. A red arrow points to this dropdown.
- Email Address:** A text input field containing "Harold@Carrington.com".
- First Name:** A text input field containing "Harold". A red arrow points to this field.
- Last Name:** A text input field containing "Carrington". A red arrow points to this field.
- Custom Email:** Radio buttons for "No" (selected) and "Yes".
- Import Users:** A button located below the Custom Email section.
- Send Assessment Link:** A blue button at the bottom right. A red arrow points to this 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.

**Send Assessment**

Select Assessment Link:  
Customer Service Team

Email Address:  
Harold@Carrington.com

First Name:  
Harold

Last Name:  
Carrington

Custom Email  
☐ No ☒ Yes

Email Subject  
Assessment confirmation email

Email Content

Dear %%e\_FirstName%%:

%%A\_Name%% thanks you for taking our assessment.

Please click on the link provided below to gain future access back to your account.

%%enduseraccesslink%%

If you are experiencing trouble using the above link, please copy the URL and paste it into your browser:

%%enduseraccesslink%%

**Please save this email so you can easily log back into your account with the link above.**

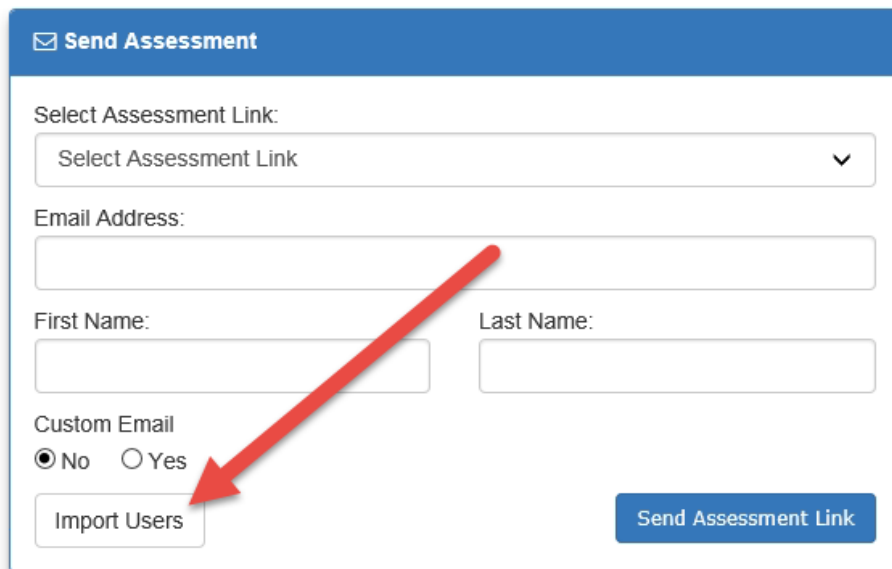
Design HTML Preview Words: 87 Characters: 577

Import Users Send Assessment Link

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.

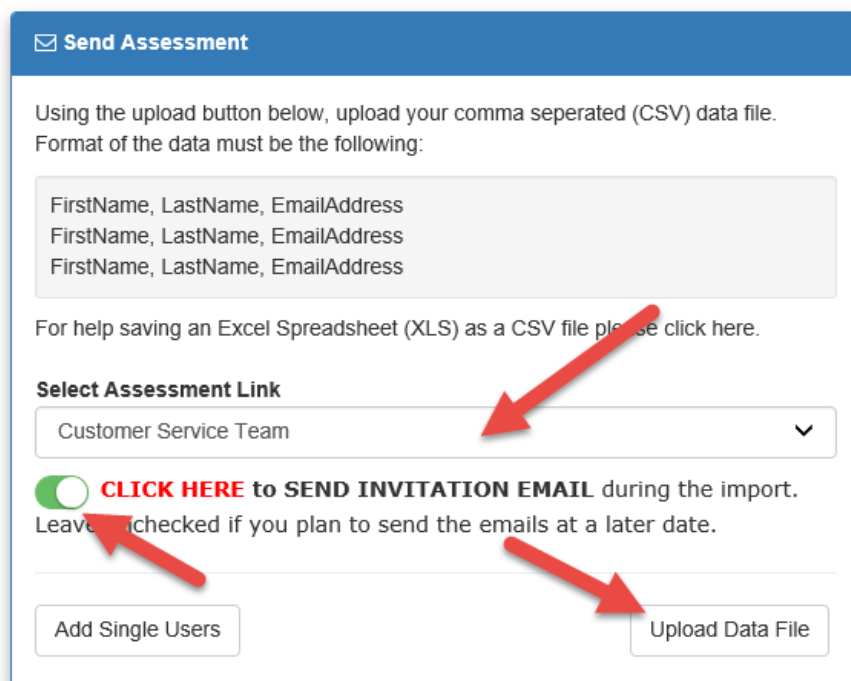
To start the process, click on the “**Import Users**” button.



The screenshot shows the 'Send Assessment' form. At the top is a blue header with a white envelope icon and the text 'Send Assessment'. Below the header, there is a 'Select Assessment Link:' label followed by a dropdown menu with 'Select Assessment Link' and a downward arrow. Underneath is an 'Email Address:' label followed by a text input field. Below that are 'First Name:' and 'Last Name:' labels, each followed by a text input field. Further down is a 'Custom Email' section with two radio buttons: 'No' (selected) and 'Yes'. At the bottom left is a button labeled 'Import Users', which is pointed to by a red arrow. At the bottom right is a blue button labeled 'Send Assessment Link'.

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 'Send Assessment' form with the 'Import Users' section. It starts with a blue header with a white envelope icon and the text 'Send Assessment'. Below the header, there is a text block: 'Using the upload button below, upload your comma seperated (CSV) data file. Format of the data must be the following:'. This is followed by a light gray box containing three lines of sample CSV data: 'FirstName, LastName, EmailAddress', 'FirstName, LastName, EmailAddress', and 'FirstName, LastName, EmailAddress'. Below this box is a text link: 'For help saving an Excel Spreadsheet (XLS) as a CSV file please click here.'. Then, there is a 'Select Assessment Link' label followed by a dropdown menu with 'Customer Service Team' and a downward arrow. Below the dropdown is a green circle with a white checkmark, followed by the text 'CLICK HERE to SEND INVITATION EMAIL during the import. Leave unchecked if you plan to send the emails at a later date.'. A red arrow points to this green circle. At the bottom left is a button labeled 'Add Single Users'. At the bottom right is a button labeled 'Upload Data File', which is pointed to by another red arrow.

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>

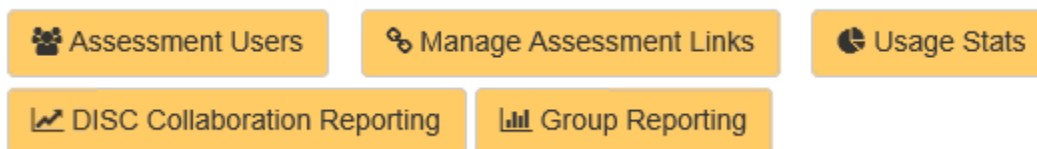
Lyle McLean <lyle@mclean.com>

**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.

Usage Statistics

Choose a date range below.

From 3/1/2016 Through 4/30/2016 [Get Report](#) [Export to Excel](#)

Assessment	Credits Received	Credits Distributed	Credits Completed
Account: <b>Assessment Demo Company</b> ; Credits: <a href="#">Received</a> , <a href="#">Distributed</a> , <a href="#">Completed</a>			
Group: -- None --; Summary:	Credits Received: 531	Credits Distributed: 0	Credits Completed: 0
Group: <b>ABC Location</b> ; Summary:	Credits Received: 0	Credits Distributed: 3	Credits Completed: 1
Group: <b>Branch X</b> ; Summary:	Credits Received: 0	Credits Distributed: 0	Credits Completed: 0
Group: <b>Seminar Attendees</b> ; Summary:	Credits Received: 0	Credits Distributed: 0	Credits Completed: 0
Group: <b>Training Date Y</b> ; Summary:	Credits Received: 0	Credits Distributed: 0	Credits Completed: 0
Total:	531	3	1
Total:	531	3	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.


Assessment	Credits Received	Credits Distributed	Credits Completed
Account: <b>Assessment Demo Company</b> ; Credits: <a href="#">Received</a> , <a href="#">Distributed</a> , <a href="#">Completed</a>			




## 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.