TALENT ASSESSMENT PORTAL ONBOARDING VIDEO – AUDIO TRANSCRIPT

INTRODUCTION/OBJECTIVES
Welcome to the Onboarding video for the Talent Assessment Portal! This easy-to-use platform is where you will conduct all your assessment procedures.
By the end of this tutorial, you will be able to navigate the home page… send invitations to complete the assessment… manage your participants… generate reports… and conduct a multi-rater assessment.
To learn more, click Continue, or jump ahead by clicking a specific topic.
MODULE 1: NAVIGATING THE HOME PAGE
When you log on to the Talent Assessment Portal, you're taken to the home page. The page displays the products you have access to. To conduct an assessment, click a product icon.
This takes you to the recent assessment page for that product. Recently completed assessments are displayed here, while your recently generated reports are shown here.
Most assessments follow a three-step process of Invite > Manage > Report. You access these steps by clicking these tabs.
At any point during the assessment process, you can return to the home page by clicking Home.
To change your settings, such as adding a low-token alert, click Account Settings.
To recover assessments that have been mistakenly deleted, click Deleted Items.
To purchase tokens, which are necessary for generating reports, click Manage Tokens.
Finally, to learn more about the Assessment Portal, go to the help center, where you'll find a wide range of resources to help you along.

MODULE 2: SENDING INVITATIONS TO COMPLETE THE ASSESSMENT
The assessment process is divided into three steps: • Step 1: Invite participants to take the assessment. • Step 2: Manage participants to ensure they complete the assessment, and • Step 3: Generate reports from completed assessments.
In this module we'll demonstrate with the EQi, but other single-rater assessments, such as the CSI 2 and HRG, follow the same process.
To begin the invitation procedure, click Invite in the left menu.
You invite participants by sending them a link to complete the assessment online. There are two ways to send out this link: The Personal Invitation and the Open Invitation. The Personal Invitation sends a unique link to a participant to complete the assessment online. It is your best choice if you know the names and email addresses of the participants.
To enter participants one at a time, select a language for your invitation, and put the invitation into a folder.
You now need to enter the participant's name and email address.
Please note that only the email address is required. If privacy is an issue, you do not have to enter a first or last name for the participant. In that case, you might want to enter an ID for identification purposes.
When you're done, click Add participant.
The participant is now added to the invitation list.
Alternatively, if you have a lot of participants, you can download a spreadsheet to your computer.
Open the spreadsheet and enter the participant's names and addresses.
Save the spreadsheet, and then click Upload participant list.
Select the saved spreadsheet
And then click upload file.
The participants are now displayed in your list.

The next step is to create an email to send to participants. The email contains a link that the participant clicks to complete the assessment online. You can use the default text or select the custom button to create your own customized template.
At the bottom of the page are the optional settings. You can track assessment completion by entering the name and email address of the person you want to be notified when an assessment is completed. You can also enter an expiration date for the invitation link. After this date, the link will no longer work.
The last step is to review your invitation. If everything is okay, click Send Email.
Your assessment invitations have now been sent to the participants.
Please note that the invitation email will be sent to participants from NoReply@mhs.com. If you want to have the email come from a different address, you need to go to account settings and change your email settings.
For more information on how to do this, please consult the Help Center.
If you don't want to use the Personal Invitation, you can use the Open Invitation. This creates an online link that can be distributed to multiple participants. It is your best choice if you don't know the names and email addresses of the participants, or if you don't want to send out personalized invitations.
To begin, select a language for your invitation, give it a name, and put the invitation into a folder.
If you want the invitation to expire, click this box and enter an expiry date.
After this date, the assessment link in the open invitation will not work.
Review your invitation settings. If everything is okay, click Generate Link.
The invitation link is now ready for distribution. If you want to provide instructions, copy this text into an email and send it to participants. For more information about inviting participants, consult the help center.

MODULE 3: MANAGING PARTICIPANTS

After you invite a participant to take an assessment, you track their progress on the manage page.

In this module we'll use the EQI, but other single-rater assessments, such as the CSI 2 and HRG, follow the same process.

To begin, click Manage in the left menu.

All of the participants you invited to take the assessment are listed here.

You can check if they've completed the assessment by looking in this column.

Completed means they've taken the assessment.

Scored means they've completed the assessment, and you've generated a report for them.

Pending means the participant has not completed the assessment.

Expired means the participant has not completed the assessment, and their assessment link has expired.

If you want to edit the details of a participant, click the participant's name.

When you're done making your edits, remember to click Save Changes.

To send reminders to complete the assessment, select your pending participants.

Now, select the reminder command from the "I would like to" menu.

The reminder email appears. You can use this text, or make changes to create your own.

When you are ready, click **Send reminders**.

The participants are now sent reminders to complete the assessment.

To delete one or more participants, select them and then select Delete Selected Participants.

The open invitations tab is where you manage your open invitation links.

The status of the invitation is seen in this column.

Active means that participants can use the link to complete an assessment.

Expired means that the link has expired, and participants can no longer use it to access the assessment.

To edit an open invitation, click the invitation name.
Make the changes you want. In this case, we'll add a contact.
When you're done, remember to click **Save** changes.
To delete one or more open invitations, select them and then select, Delete Selected Links.
For more information about managing participants and open invitations, consult the help center.
MODULE 4: GENERATING REPORTS
After a participant has completed the assessment, you need to generate a report. We'll demonstrate with the EQI, but other single-rater assessments follow the same process.
To begin, click Reports in the left menu.
Click **Select** for the report type you want to generate. Note that the types of reports that are available will change, depending on the product you are using, but the procedure to generate a report will basically stay the same.
Select the participants you want to generate a report for. If you don't see a participant listed, it means that they have not yet completed the assessment.
For most talent assessments, you must now select the norm region and norm type for the report.
The norms you select will become the group that your participants will be scored against.
Next, you can customize the report by selecting the language for the text, adding a title, and inserting a logo on your front page.
For some assessments, you can also customize the content. Just click the toggle switch to include or exclude specific sections from the report.
Finally, some assessments allow you to purchase additional content, such as workbooks and scored datasets. Just click the toggle switch to include the item in your purchase.
When you're done, check your order on the review page. Note that the price in tokens will always be shown at the bottom. To generate the report, click Place Order.

After your report has been generated, you can view it on the My Reports page. For more information on generating reports, consult the help center.
MODULE 5: VIEWING AND DISTRIBUTING REPORTS
After you have generated a report, the report can be viewed as a PDF on the My Reports page.
The newest reports are shown at the top of the list. To download a report to your computer, click the download link.
If you want to download multiple reports at once, select them, and then click Zip Reports.
Name the zipped folder and click Create.
A zipped folder containing the reports will be created. To download the folder to your computer, click the link.
If you want to email the Client Reports to participants, select them, and then click Email reports.
The participants will each receive an email with a customized link to download their report.
Note that participants must have an email address associated with their listing before you can use the email feature. To add an email address to a participant, go to the Manage page and click the participant's listing.
One important detail to remember about the My Reports page is that a report will only be available for five days after the report is generated. After that, the download link will disappear, and the status of the report will change to Archived.
If you want to access the report after that time, you must regenerate the report. To do this, select the archived report and click Regenerate.
A new listing for the report will appear at the top of the table, along with links to download the report.
Please note that there is no charge for regenerating a report, and you can regenerate it as many times as you need.
For more details about reports, please consult the Help Center.
MODULE 6: CONDUCTING A MULTI-RATER ASSESSMENT
Most of the products on the Talent Assessment Portal are single-rater assessments.

However, there are also multi-rater assessments, such as the EQ three sixty, DLP, and ELP. In a multi-rater assessment, the participant is evaluated by different raters, such as managers, co-workers, and direct reports. In this module we'll demonstrate with the EQ three-sixty, but other multi-rater assessments follow the same process.
To begin, click Invite in the left menu.
If you know the email addresses of the participants and raters, select the Personal Invitation.
Next, select or create a folder to put the invitation into.
The next step is to enter the details for the participant you want to be rated.
You then create an email to send to the participant. The email contains a link that the participant clicks to complete the assessment online. You can use the default text shown here or customize the content.
At the bottom of the page are the optional settings. You can track assessment completion by entering the name and email address of the person you want to be notified when an assessment is completed. You can also enter an expiration date for the invitation link. After this date, the link will no longer work.
On the next page, add the raters for each participant by clicking Assign Raters.
Enter the raters name and email address.
Next, indicate the raters relationship to the participant, Depending on the assessment, this might be manager, peer, or direct report.
For each rater you enter, click Add.
Repeat these steps to add additional raters to the participant. When you're done, click Close.
The next step is to create an invitation email to send to the raters. You can use the default text or customize it. Note that the text includes a link that the raters will click to access the assessment.
Finally, if you want to allow participants to nominate their own raters, select this checkbox.
Next, you can add up to five questions to the assessment. You can select from the default questions, or you can create your own custom question.
Note that these questions will only be answered by the raters you invite, not the participant. The rater's responses will then appear in the generated report.

Review your settings. When you're done, click Send Email.
Your invitations are now sent to the participants and applicable raters.
After you send the invitations, you manage the participants and raters on the Manage page.
There are two tabs. One for the participants and one for the raters.
Pay attention to the status column. **Completed** means the participant or rater has taken the assessment. **Scored** means the participant or rater has completed the assessment, and you've generated a report for them. **Pending** means the participant or rater has not completed the assessment. **Expired** means the participant or rater has not completed the assessment, and their assessment link has expired.
If you want to modify the details of a participant or rater, click their name.
To send reminders to complete the assessment, select your pending participants or raters and then select the reminder command from the menu.
The reminder email appears. You can use this text or make changes to create your own. When you are ready, click **Send reminders**.
After the participants and raters have completed the assessment, it's time to generate a report.
To begin, select the report type you want to generate. Note that the type of report will change depending on the product you are using, but the procedure to generate a report is consistent across the multi-rater assessments.
Select the participant to generate the report for.
On the next screen, select the raters whose assessments you want to include in the report. Pay attention to the icons. They denote the relationship of the rater to the participant. Most multi-rater assessments require you to select at least one manager or three or more raters with the same relationship to the participant. In this case, we could select one manager, or three peers, or we could select all of them.
For most talent assessments, you must select the norm region and norm type for the report.
These norms indicate what group your participants will be scored against. Next, you can customize the report by selecting the language, adding a title, and inserting a logo on your front page.

Depending on the product and report type, you can also customize the content. Just click the toggle switch to include or exclude specific sections from the report.
Finally, some assessments allow you to purchase additional content, such as workbooks. Just click the toggle switch to include the content in your purchase.
When you’re done, check your order on the review page. Note that the price in tokens will always be shown at the bottom. To generate the report, click Place Order.
After your report has been generated, you can view it on the My Reports page. For more information on generating multi-rater reports, consult the help center.
MODULE 7: CONCLUSION
You have now completed the onboarding tutorial for the Talent Assessment Portal. If you want to learn more, go to the Help Center where you’ll find a wide range of resources.
If you have any questions, please don’t hesitate to contact us. Thanks for watching!