

QUICK START GUIDE - Assigning a 360 Upgrade

This guide assumes that you have logged on to your console and have clicked on Users and Assessments. If you don't know your login information, contact us at EOnline@effectivenessinstitute.com or 425-641-7620

FIND EXISTING SELF ASSESSMENTS

To upgrade users from a Self to a 360, first you need to find the completed Self. If they all took the Self as part of a tagged group, just find that filter (see Filters and the Results Screen). If not, there are several ways to find each person:

1 Enter the person's email address in the search bar.

OR

2 Click the triangle next to **Inventory**, then click on Behavior Style Self

3 In the Results pane, find the completed Self assessment for each person and click the box next to their name

4 Click on **Add to Selected Users**

The screenshot shows the 'All Users' and 'Selected Users' tabs. A search bar is at the top. Below it is a 'Filter' section with a triangle next to 'Inventory'. A dropdown menu is open under 'Inventory', showing options like 'Behavior Style Self [180]', 'Behavior Style 360 [198]', 'Behavior Style 360 Upgrade [99]', 'Behavior Style 360 Observer [0]', and 'Behavior Style Team Distribution Ch'. A 'Results' table is shown below with columns: First Name, Last Name, Email, Reports, Type, Assigned, and Completed. A red arrow points to the 'Reports' column header with a 'tip' box: 'tip Clicking on a column header will sort by that column'. A red box with the number '3' is over the checkbox in the first row of the table. A red box with the number '4' is over the 'Add to Selected Users' button.

First Name	Last Name	Email	Reports	Type	Assigned	Completed
San	User 1	Sample1@test.com	<input checked="" type="checkbox"/>		01/21/2014	
San	User 2	Sample2@test.com	<input checked="" type="checkbox"/>		09/24/2013	09/25/2013
Sample	User 2	Sample2@test.com	<input checked="" type="checkbox"/>		12/06/2013	06/26/2014
Sample	User 2	Sample2@test.com	<input checked="" type="checkbox"/>		10/09/2014	
Sample	User 2	Sample2@test.com	<input checked="" type="checkbox"/>		09/24/2013	09/25/2013

ASSIGNING THE 360 UPGRADE

5 Click on **Selected Users**

6 Make sure everyone is here. If you're missing someone, go back and repeat the steps above

7 Click on **Assign Assessments**

8 In the pop-up box, click on Behavior Style 360 Upgrade, then click **Next**. Click **Next** again. Then you can email the assessment invitation or cancel if you want to send it later.

The screenshot shows the 'Assign Assessments' pop-up box. At the top, there are buttons for 'Add User', 'Assign Assessment', 'Email Assessments', and 'View Report'. Below these are tabs for 'All Users' and 'Selected Users'. A list of users is shown with checkboxes. A red box with the number '6' is over the checkbox for 'Sample'. A red box with the number '7' is over the 'Assign Assessment' button. A dropdown menu is open, showing 'Inventory Type' with options: 'Behavior Style Self', 'Behavior Style 360', 'Behavior Style 360 Upgrade', 'Behavior Style Team Distribution Chart', 'Behavior Pattern', 'Teams That Work', and 'Teams That Work+'. A red box with the number '8' is over the 'Behavior Style 360 Upgrade' option.