How to Obtain Reports and Manage Your Projects

Contents

Definitions

Basket:
The area where your purchasing requests are stored and processed pending your confirmation.

Checkout:
The area where you confirm your purchasing requests and arrange payment.

Credits:
The common units that must be purchased in order to obtain your reports: each report requires a specific number of credits.

GDPR:
The European General Data Protection Regulations. These statutory regulations govern how we can use your data, details of respondents and how you can use the WSABI® reports.

Project:
A means of organising the respondents and the reports you want by category, date, company, department, role, etc. You must set up at least one project in order to generate your WSABI® reports.

Questionnaire:
The WSABI® questionnaire which each respondent must complete. The outputs from the completed questionnaire are analysed and processed to construct the WSABI® reports.

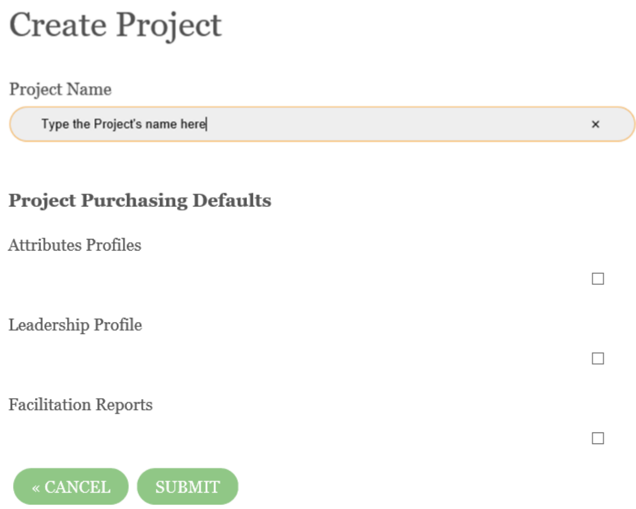
Respondent:
The person you want to order WSABI® reports for and ask to complete the questionnaire.

Setting up your first project

Before you can order any reports, or enter the details of any respondents, you must set up at least one project.

Projects are used to organise your reports and respondents. You can use projects to organise them by date, report type, client name, role, assignment or any other method that suits your purpose.

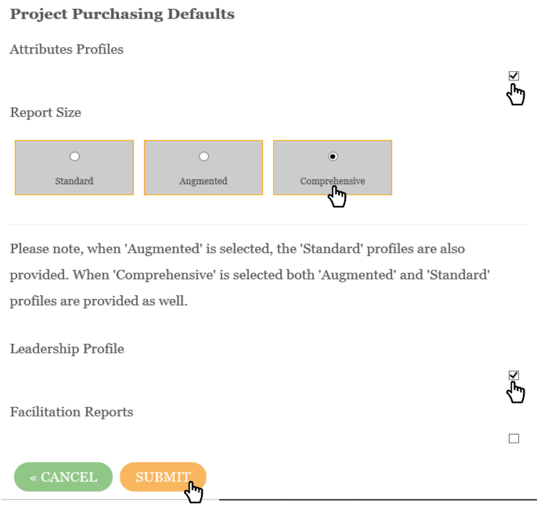
To get started click on the 'My Projects' tab in the green bar (which is visible once you have logged in) then click the ADD button in the Projects page.



Firstly give your project a pertinent name.

This page also allows you to specify default reports if you want to order the same reports for each respondent you include in this project.

If you tick the Attributes Profiles box you are then given three alternatives to choose from (go to the 'Our Reports' page to find out what each contains and to view example reports).

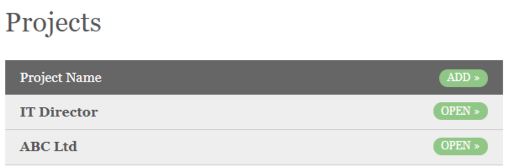


Select the reports you want to order for (most of) the respondents in this project.

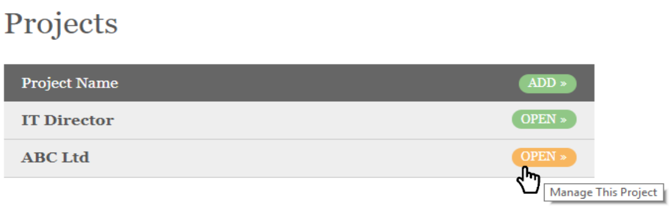
If you want to, you can override these default settings and select different reports for particular individuals when you enter their details.

You can also order additional reports for any respondent at any time, up to the point that their questionnaire outputs become outdated (usually 3 months).

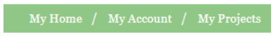
Then click submit to save your choices. You are then returned to your Projects page where to can see a list of your projects and add any additional ones.



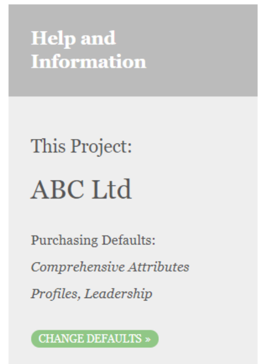
Adding respondent details and selecting reports

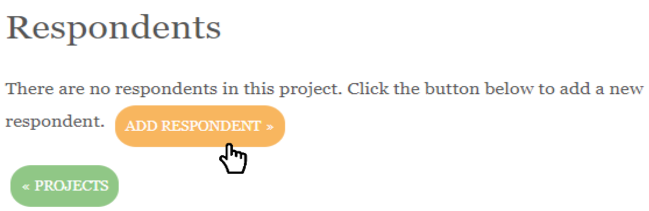


In your Projects page click the OPEN button to manage that project and add respondents.



As well as providing lots of other advice, the 'Help and Information' sidebar shows you which reports you've set as defaults for this project. (If you want to re-set these click the CHANGE DEFAULTS button and you will be taken to the Edit Project page where you can also re-name this project if you wish).



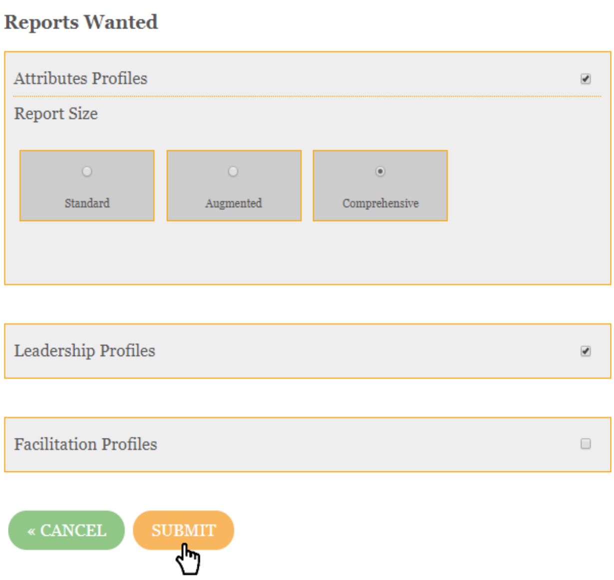


If you don't want to change the defaults, click the ADD RESPONDENT button to start populating this project.

In the following page add the required details as shown.

Don't worry if you are unsure of the spelling of their name, they'll be asked to check and correct it when they log in to complete their questionnaire.

The email address MUST be correct otherwise they will not receive the emailed link to their questionnaire.



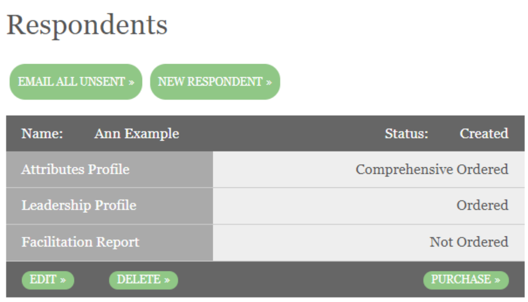
Further down the page you can see the reports that have been set as defaults for this project.

You can change them now, for this respondent, if you wish. Use the tick boxes and 'radio' buttons to change your selections.

When you have finished entering the details click SUBMIT to save this respondent to your project.

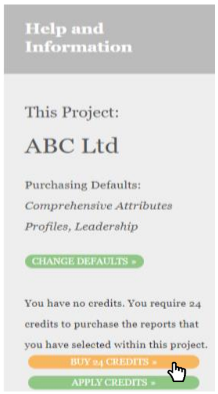
A status table is then created for this respondent.

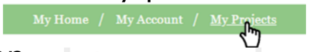
From this table, you have the option to edit or delete their details, but you won't be able do take any further action with this respondent until you have bought the credits required to purchase the reports you have ordered. You can however continue to add other respondents to this or other projects before buying the credits you need.

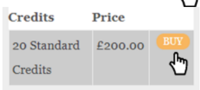


Purchasing credits

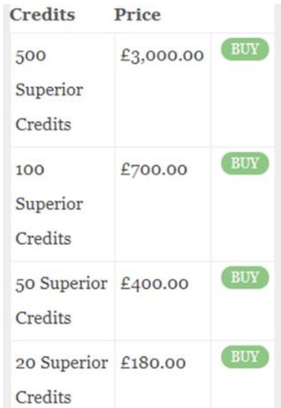
When you have added the respondents to your project, the side bar shows your current credit balance and how many credits are needed to purchase the reports you've ordered. The quickest way to purchase the credits you need is to click the BUY CREDITS button



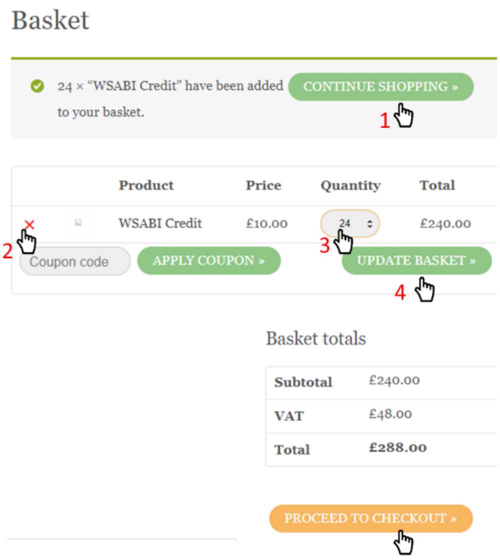
As a Standard Account holder you can also buy packs of 20 Standard Credits at any time: click "My Projects" in the green bar 

and then scroll down to the bottom of the side bar and click the BUY button 

However, if you have upgraded your account (see Instructions for Operating and Managing Your Account in your 'My Home' page) you will be offered special offers of Credit Packs at discounted process – the larger the pack, the bigger the discount – up to 40%!



Clicking any 'BUY' button takes you to your 'Basket'.



We will only supply coupons in exceptional circumstances, so these notes deal with the more common tasks:

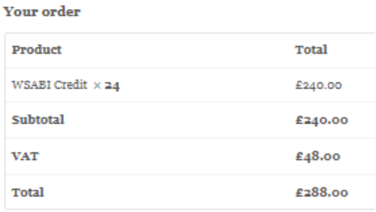
1. If you want to add more respondents or reports before completing the purchase, click CONTINUE SHOPPING to return to the project's Respondents page.

2. If you want to delete this order, click the red X.

3. You can adjust the number of credits (or credit packs) you want to buy by typing a different figure in this box or by using the up and down arrows. You may need to increase the number of credits if you are going to order more reports in the near future, or if you want to use a non-standard payment process that incurs additional charges: see purchasing Reports page and our terms of business)

4. If you do change the quantity, you must click UPDATE BASKET to save the changes.

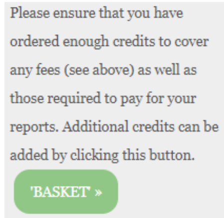
Finally click PROCEED TO CHECKOUT to continue to payment.



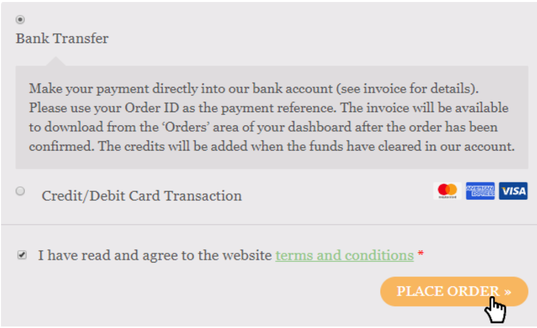
Your order

Product	Total
WSABI Credit × 24	£240.00
Subtotal	£240.00
VAT	£48.00
Total	£288.00

A summary of your order is also shown on this page – you can go back to the 'Basket' and amend this order by clicking the button at the bottom of the side bar.

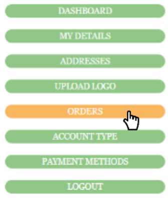


If everything is correct you then need to choose your payment method, then tick the T&Cs statement box and click PLACE ORDER.



If you are paying by bank transfer (or money transfer via PayPal) payment instructions are contained in the invoice.

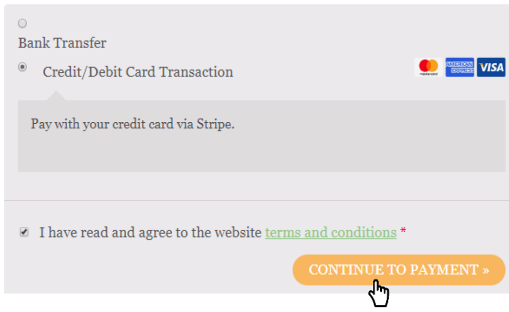
You can view and download your invoice in the My Account/Orders page.



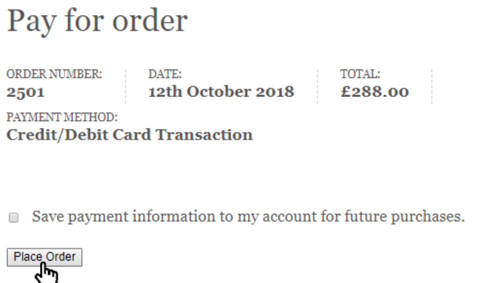
Payments by bank/money transfer may take a few days to process and the credits will only be added to your account after we have received payment. The quickest way of obtaining the credits you need, to purchase your reports, is via a credit/debit card transaction. In this case, as soon as the (successful) transaction has occurred the credits will automatically be added to your account for immediate use.

To pay by card:

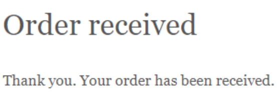
1. Click the card transaction 'radio button', tick the T&Cs statement box and then click CONTINUE TO PAYMENT.

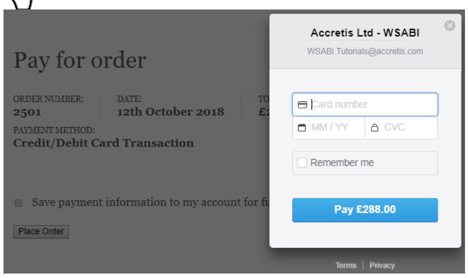


2. Click the 'Place Order' button to transfer to our card processing partner's (Stripe) secure/encrypted terminal (before doing so you can also opt to save your card details for future payments – you can also do this in My Account/Payment Methods).



3. Add your card details in 'terminal' fields and then click the pay button. If successful that button will turn green and contain a tick ✓. The page with then refresh and display this message:

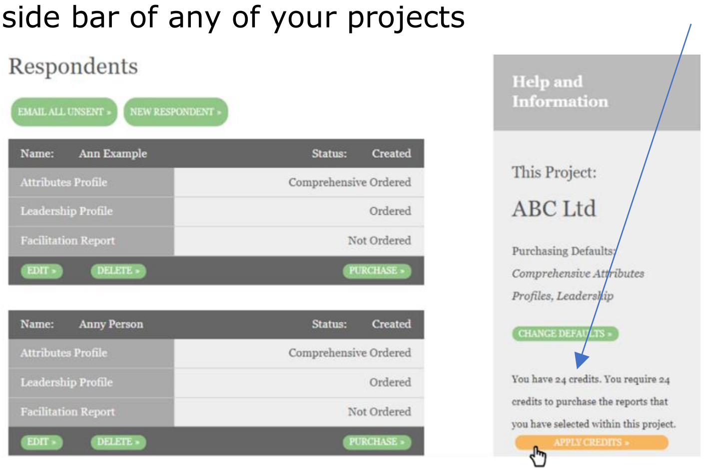




Using your credits to purchase reports

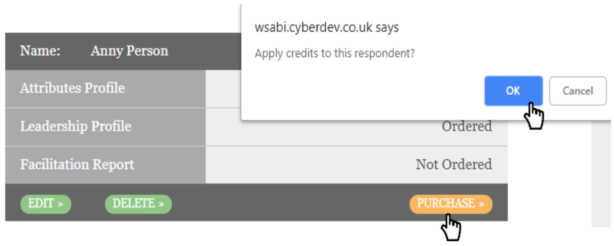
You can check the status of your order in your Orders area (My Account/Orders)

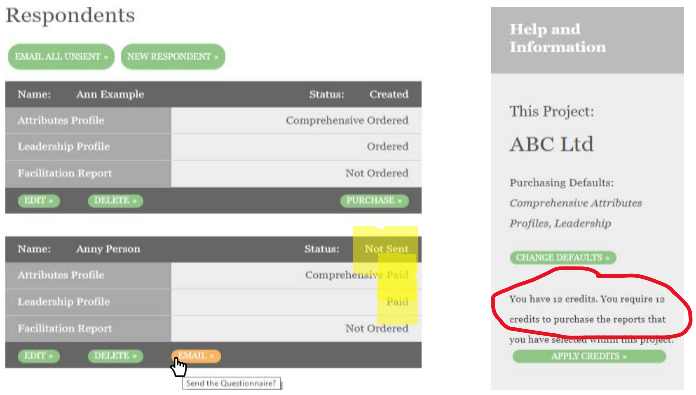
Once we have received payment the credits will be added to your account as can be seen in the side bar of any of your projects



If you have enough credits to purchase ALL the reports in your project, you can assign them all in one go by clicking APPLY CREDITS.

Most users, however, prefer to check what they've ordered for each respondent and assign them individually. To do this, click the PURCHASE button in the relevant respondent's status table and then click OK in the pop-up box to confirm your choice.



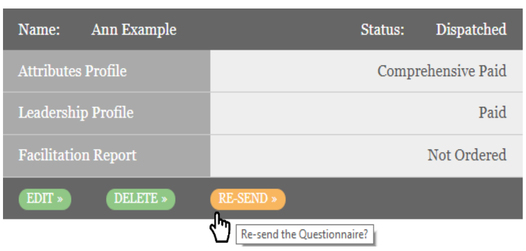


Once credits have been assigned, the credits balance will be reduced and the status of the respondent and the reports will change (see highlighted sections).

In the name bar "Not Sent" is now shown and a new EMAIL button appears in the 'Actions' bar.

At this stage you can still go back to the respondent's details area (e.g. to check or change the email address) and if you decide that you no longer wish to obtain reports for this respondent (e.g. if they withdraw from the process) you can still delete them from the project. If you delete a respondent, any credits you used to pay for their reports should be automatically added back to your balance.

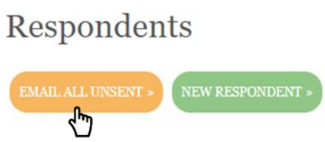
As soon as you are ready to send the respondent their unique link to the WSABI® questionnaire, click EMAIL.



Their status now shows as "Dispatched" which indicates that the email has been sent but they haven't yet logged in.

If they don't receive the email, check you have spelt their email address correctly (click EDIT) and click RE-SEND to send the link again. You can do this again if they delete the email before completing their questionnaire.

If you have a number of links to send out within a project you can use the EMAIL ALL UNSENT button to send them all out together.



Checking a respondent's progress

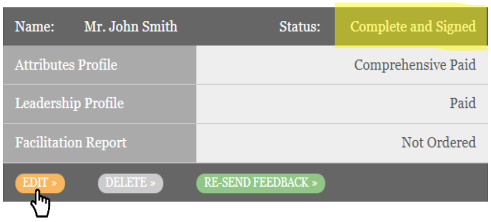
Once a respondent has received their link and logged in, their status name bar will change to reflect how far they have progressed with the questionnaire. Once they've checked and saved their details, their title will also be shown.

The various status messages that will be displayed are:

- Delivered and Opened
- Editing Section One
- Editing Section Two
- Section Two Complete
- Complete and Signed

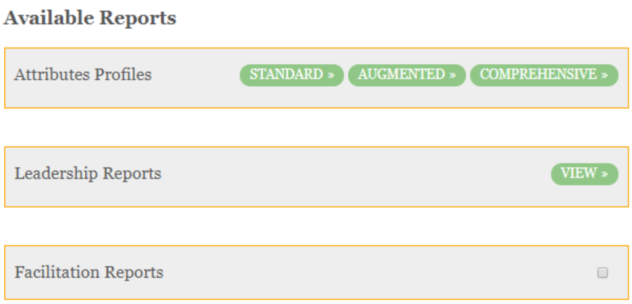
Obtaining your reports

Once "Complete and Signed" is displayed, you can now download the reports you purchased.



The respondent will also be automatically sent a link to their own personal Feedback Report. If they tell you that they have not received this then you can re-send this directly to them, without needing to contact us, by clicking RE-SEND FEEDBACK

To view and download the reports you have paid for, click EDIT to go to the respondent's details page.



When the reports you've paid for are available the buttons in these fields become active and turn green.

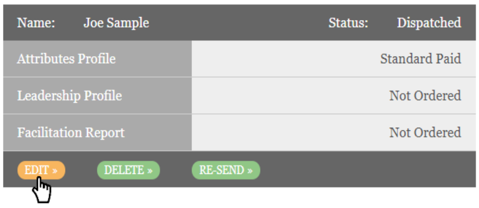
Click the relevant button to view and download the report.

These buttons remain inactive (greyed out) until the candidate has completed and signed off their questionnaire.

Upgrading your order and buying additional reports

At any time, after purchasing your initial reports until the data expires (up to 3 months after questionnaire completion), you can purchase additional reports.

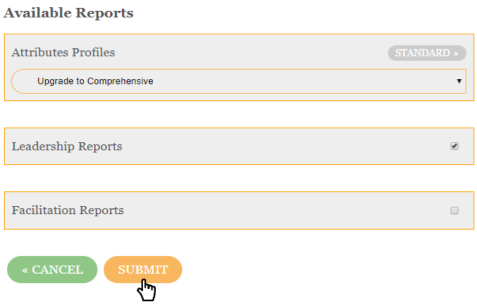
Here we'll demonstrate the process with an example where initially only a Standard Attributes Profile has been paid for.



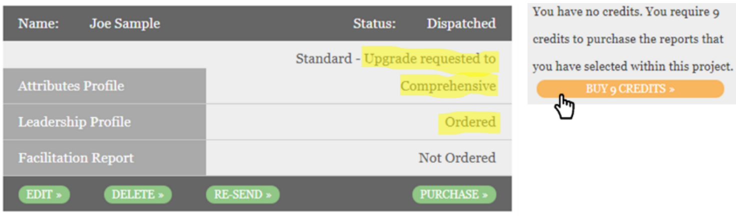
Step 1: Click EDIT to go to the respondent's details page.

Step 2a: use the arrow (a) to open the options for other Attributes Profiles and/or tick the relevant (empty) boxes (b) if you also want Leadership and/or Facilitation Reports.

Step 2b: if you want to change which Attributes Profiles you want, select the appropriate upgrade from the drop-down box.

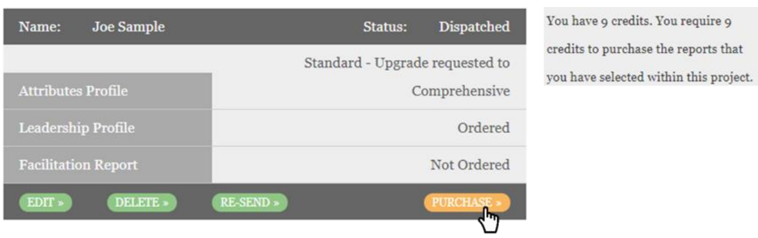


Step 3: Click SUBMIT to confirm your new order.

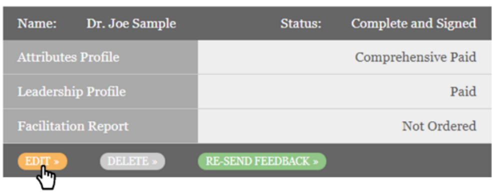


The respondent's table now shows the details of the new order. If you want to proceed with this you need to assign the required credits.

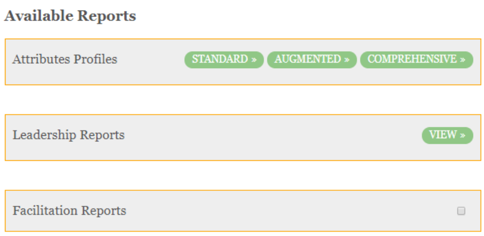
Step 4: Buy additional credits if not enough are available



Step 5: when the side bar shows that you have enough credits, click PURCHASE to pay for these additional reports.



Step 6: when the respondent's status shows "Complete and Signed" click edit to go the respondent's details page and download the available reports



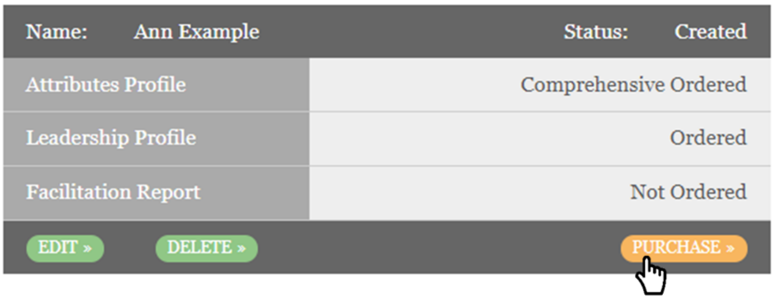
What to do when a respondent's data expires

WSABI® reports are valid for three months, from completion of the questionnaire or until there is a significant change in their circumstances, if sooner.

When this happens their status summary table in the project/respondents page will appear like this.

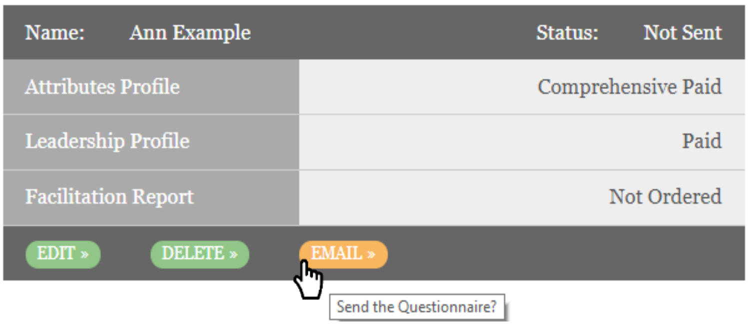
You can still view their details by clicking the EDIT button, but you will no longer have access to the previously available reports.

If you want to obtain new, valid reports for this respondent you will need to set them up as a new respondent again…



…and then pay for the new reports.

You can add them to the same project or a different one. If you add them to the same project both the 'expired' and 'current' status tables will be visible.



You will then need to EMAIL them a request to complete a new WSABI® questionnaire, as their previous link will no longer work.