

TUTORIAL: CREATING A BASIC (NON MULTI-RATER) CAMPAIGN with **REPORTS and DATA DOWNLOAD**

CONTENTS

INTRODUCTION	3
HOW TO LOGIN	4
CREATING A CAMPAIGN	5
RESPONSE DEADLINES	8
EMAIL	9
OPTION 1 (default): "Just Use the Mind Garden Email"	9
OPTION 2: Add text and a customized subject line to "Just Use the Mind Garden Email"	10
OPTION 3: "I'll Send My Own Email to Participants"	10
REPORTS AND DATA	12
Report Management	12
Set Norm	13
Download Data – "No data available"	13
ADDING PARTICIPANTS	14
ACCESSING REPORTS AND DATA DOWNLOAD	16
Personal Reports	16
Group Reports	17
Download Data	18
LICENSES	19
ACCOUNT SETTINGS	20
SPECIAL SITUATIONS	21
I want to select the "Just Use the Mind Garden Email" option, but I want to enter my participant having the automatic email invitation go out immediately upon entering the names	
I want to input all data myself	21
KEY TERMS	22
CONTACT MAIND CARDEN	

INTRODUCTION

Welcome to Transform™ - Mind Garden's system for conducting surveys and assessments.

This tutorial provides step-by-step processes for creating and managing basic (non multi-rater) campaigns with reports and/or data download. This tutorial will be most beneficial to customers who have purchased Transform™ Survey Hosting for a non-multi-rater instrument and are ready to begin collecting data. If you have purchased Transform™ Survey Hosting for a multi-rater instrument, please reference the "Multi-rater Campaign" tutorials available on the Mind Garden website. If you are a participant, please reference "Tutorial – Using Mind Garden's Transform™ System" document also available on Mind Garden's website. Don't understand these terms? Please refer to our Key Terms page.

Please read through the entire chapter of interest – many clarifications and responses to frequently asked questions are detailed throughout the chapter. Still have questions? Contact Mind Garden – we're happy to help!



"What sunshine is to flowers, smiles are to humanity. These are but trifles, to be sure; but scattered along life's pathway, the good they do is inconceivable."

- Joseph Addison (1672-1719)

English essayist, poet, playwright, and politician

HOW TO LOGIN

Go to Mind Garden's home page (<u>www.mindgarden.com</u>) and click **Login** from the top menu. This will take you to the login page below.



New users: Use the **green box** to enter your email address and create a password. Check the box below to agree to Mind Garden's terms of service, and then click **Create**.

Returning users: Use the **blue box** to enter you email address and password. If needed, click **I forgot my password** to receive a temporary password. Once you receive the new password via email, you may change the password to one of your choice via the Account menu's profile setting.

Successful login will take you to your Transform™ Portfolio home page.

CREATING A CAMPAIGN



You will need to purchase Transform™ Survey Hosting for an instrument before you create a campaign, either through www.mindgarden.com or by contacting Mind Garden. You will need to create a campaign before you can use your purchased licenses.

Once you have purchased Transform™ Survey Hosting, login to your Transform™ Portfolio and click on Campaigns in the left menu. This action will take you to the Campaigns page. Here, you can click on existing campaigns to review or edit, or you can add a new campaign. To add a new campaign, select the instrument you wish to use and then click the Add a campaign button at the bottom of the list.

Note: If you purchased Transform™ Survey Hosting through the shopping cart, a campaign will be automatically set up for you. You will see your preset campaign in the Campaigns box.

The Transform™ system will step you through the tabs from left to right.



After you click Add a Campaign, you will be directed to your new campaign's administration page. The first tab, Campaign Details, allows you to change the campaign name, choose your default language, and to change the campaign status (campaign active vs. campaign closed). Most people like to identify campaigns by a group name and the approximate date of the administration of the instrument – for example, "Apr 2014 for MLQ – Top management".

Default Language determines which language your participants will automatically view the assessment and which language you will view your report(s). All Mind Garden instruments are available in English; other language availabilities vary for each instrument. Note: not all reports are available in the languages listed under Default Languages – please contact Mind Garden for which languages are available for your report(s).

Campaign Status specifies whether your campaign is able to collect data (Campaign Active) or if your campaign will reject additional data (Campaign Closed).

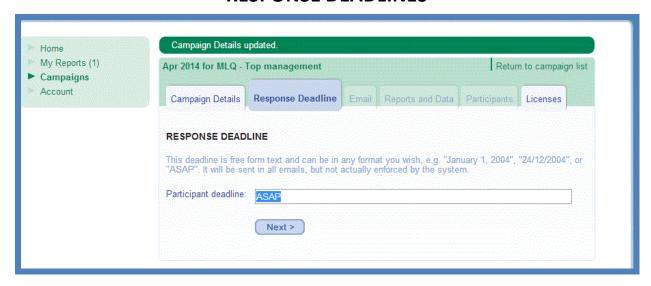
There is no limit to the number of campaigns you can create, but you can use only one instrument in a campaign.* If you wish to use a different instrument, you must purchase Transform™ Survey Hosting for that instrument and set up a separate campaign.

*Exception: If you purchased a Custom Form, your license may allow you to include more than one instrument in a campaign. Contact Mind Garden for more information about Custom Forms.

If you change the name of the campaign from the default name or change the default language, be sure to click **Next** (this button will change to **Update** after the first time) to save your changes. An error message at the top of the Campaign tabs will appear if you have not clicked **Update**. You can change a campaign name at any time.



RESPONSE DEADLINES



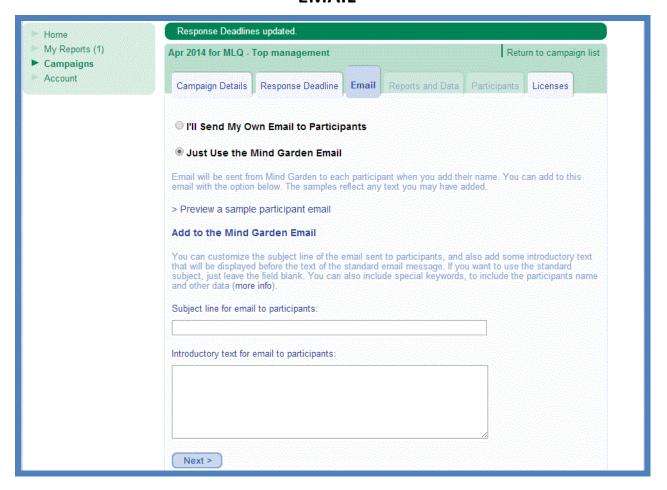
In the Participant deadline box, enter the date that you would like the participants to complete the assessment. The default setting for response deadlines is "ASAP". We recommend you set an actual date if possible in order to maximize your response rate. Near-term dates are better since most people will quickly respond. With a long-term deadline, people are more apt to set aside the response task for a later time and forget to complete the assessment.

This response deadline is not enforced by the Transform™ system, but it will be included in all email invitations and reminders sent via Transform™. Treat the deadline box as a text box – describe your deadline however you like.

You can change the response deadlines later in your campaign if you wish, however you will need to resend the email (by clicking the Resend button in the Participants tab) to all participants who have not completed the survey.

Click **Next** when you are ready to move to the next tab.

EMAIL



Please read this entire section before proceeding in the Transform™ system.

You have several options for inviting people to participate in your assessment(s).

OPTION 1 (default): "Just Use the Mind Garden Email"

If you choose the "Just Use the Mind Garden Email" you can preview a sample participant invitation email.

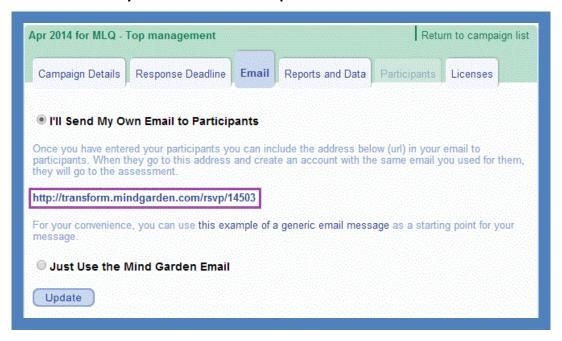
With this option, it is important to note that the email message will be sent immediately when you enter the names and email addresses of participants into the system on the Participants tab. Click Next to save your changes and to move to the next tab.

OPTION 2: Add text and a customized subject line to "Just Use the Mind Garden Email"

If you choose to add text to the Mind Garden email, your text will appear before the Mind Garden text in the email. You can also change the email Subject Line if you wish.

With this option, it is important to note that the email message will be sent immediately when you enter the names and email addresses of participants into the system. You can review your added text by clicking "Preview a sample participant email" after clicking **Next/Update** to save changes.

OPTION 3: "I'll Send My Own Email to Participants"



The "I'll Send My Own Email to Participants" option allows you to do **two** things:

1. Create your own message to participants. You may wish to click "this example of a generic email message" to start you message.

> You **must** include in your email the link shown on your screen, since the link shown on the screen above is only an example (http://transform.mindgarden.com/rsvp/####). The #### will be numbers unique to your campaign. Make sure to use the link in your own Email tab – the link in the example page is not your link!

> The link for your campaign will take your participant to a login screen, where they will enter their email address to confirm their match with your campaign and then will be directed to the assessment.

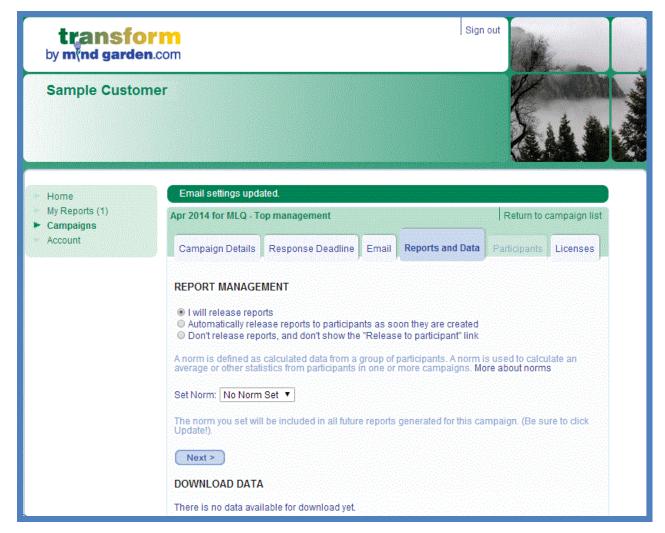
2. Send your message with the link at a time of your choosing from your regular email program. YOU MUST REMEMBER TO SEND THE EMAIL – THERE WILL BE NO PROMPT TO DO SO FROM MIND GARDEN'S TRANSFORM™ SYSTEM.

Once again, it is important to know that with this option the invitation to participate will not be sent automatically when you enter the names and email addresses of participants in the system. You must send it yourself from your own email program.

Be sure to import your participants' names and email addresses before you send your email because they need to be in Mind Garden's Transform™ database when they attempt to log in. The order of these steps is essential:

- 1) Click on the button "I'll Send My Own Email to Participants".
- 2) Click Update.
- 3) Enter your participant names and email addresses in the Participants tab.
- 4) Create your own email including the login link and response deadline and send it to your participants from your own email program.

REPORTS AND DATA



This tab allows you to access and manage your reports, norms, and data download.

Report Management

You have 3 options for Report Management. The default option, is "I will release reports". This allows you to manually release the report to the participant once the assessment is complete.

If you wish to automatically release reports to participants as soon as the reports are created, select the second option. Once the assessment is complete, an email will be sent to the participant with a link to their login page where they can access their report.

If you select the third option of Don't release reports, and don't show the "Release to participant" link, then you will not be offered the option to release the report to the participant. This option exists to keep you from accidentally releasing reports. If you want to release reports in the future, change to a difference option and click Update.

You, as the administrator, will always have access to viewing the reports. You can select a different release option at any time, however this only impacts reports that have not yet been released to participants.

Set Norm

The second part of the Reports and Data tab is **Set Norm**. This option may be of use to you if you are the administrator of a group of participants taking this assessment. A norm will allow group comparisons to be available in the personal reports and will allow multiple campaigns to be considered one group in group reports.

Norms are account-wide. This means setting a norm will also allow you to combine data across campaigns of the same instrument. For instance, if this campaign, "Apr 2014 for MLQ - Top management," and a previous campaign, "Mar 2014 for MLQ - Middle management," were both set to a norm called "Organization A", both campaigns would appear together as one group for comparison in the personal and group reports.

Only Mind Garden administrators can add norms to your account. Please contact Mind Garden via the contact form (www.mindgarden.com/contact-us), select "General Questions" as the subject, and provide what you want your norm(s) to be called as well as the name and email address associated with your Transform™ Portfolio. Once Mind Garden adds the norm to your account, you can set the norm to your campaign(s) with the drop-down menu. Be sure to click **Update** after any changes!

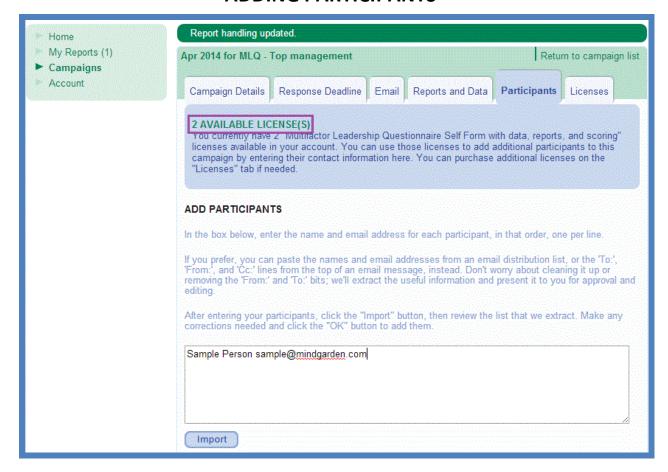
If you do not wish to use a norm on this campaign, make sure **No Norm Set** is selected in the **Set Norm** option.

Click **Next** to continue.

Download Data - "No data available"

Download Data is where you can access your data once it becomes available. If you see the message "There is no data available for download yet," none of your participants have completed the assessment. Once a participant has completed the assessment, this page will change to allow you to download your data.

ADDING PARTICIPANTS

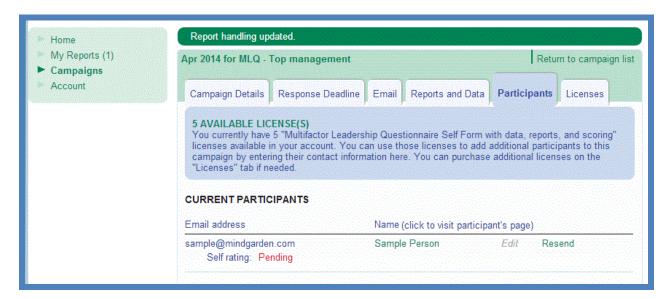


You must have data or report licenses available in order to add participants (the number of available licenses is displayed at the top of this page). You can share licenses for a given instrument among several campaigns. If you need to purchase additional licenses you can do so via www.mindgarden.com.

First, import the participants by entering first and last names and email addresses. We recommend you copy and paste these from your own document into the Import box. The input method is first name, last name, email address – each separated by one space (as shown). Each additional participant should be separated by a new line. When you are finished, click Import.



After you click Import, a new window will appear. You can make corrections to the names and emails as needed in this window and then click the OK button. If you click the Cancel button, you will be taken back one step in the process to the Import box with all email addresses and names in it.



When you have successfully entered your participants, the page will appear as above. If you have several participants, you may have to scroll down to see the complete list. The participant(s) will have a completion status that either says "Pending" (meaning the participant has not completed the assessment) or "Complete."

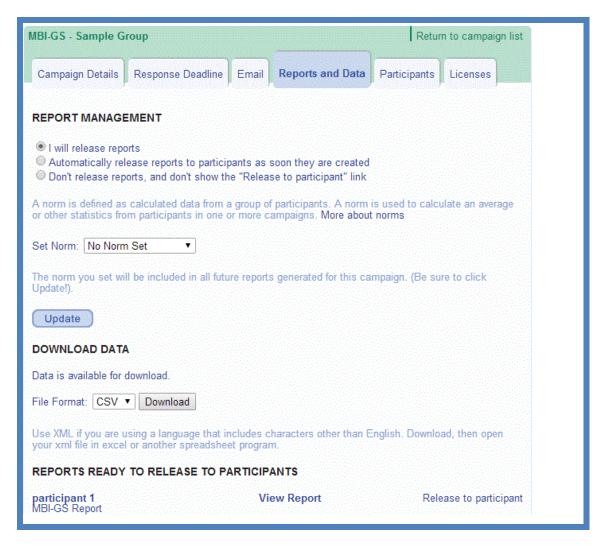
This page shows the Resend feature in the participant row, which allows you to send reminder emails to your participants who have not completed their rating. Note that if you have selected the "I'll Send My Own Email to Participants" option, the Resend feature will not appear - you must send your own reminder emails.

Note: You cannot edit a participant's name or email address once it has been imported into the Transform™ system. For any changes, contact Mind Garden.

ACCESSING REPORTS AND DATA DOWNLOAD

Personal Reports

Once your participants have completed the assessment, reports will become available in the **Reports and Data** tab. In the previous screenshots, the MLQ – Self Only assessment has been used as an example. However, the MLQ – Self Only does not have personal reports available (only group reports). To show how a personal report would appear, see an example from the Maslach Burnout Inventory – General Survey below.



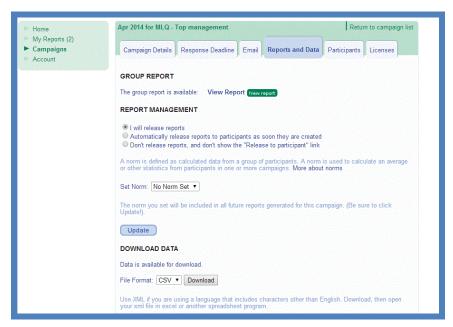
Here, you can click View Report and/or Release to participant. If you choose to view the report, a new tab will open and the Transform™ report generator will create the participant's personal report. This may take several seconds to a few minutes depending on the report. If you wish to release the report to the participant, click Release to participant and the Transform™ system will send an email to this participant with instructions on how to access their report. If "Release to participant" does not appear, it is because you selected the 3rd option at the top of the page "Don't release reports and don't show the 'Release to participant' link."

Group Reports

If you purchased a **Group Report** via www.mindgarden.com, Transform™ will create a new campaign with the Group Report attached. If you wish to add the Group Report to a different campaign, you must contact Mind Garden before continuing. Once this is complete, an additional area will appear in the Report and Data tab. The Group Report will be available once one participant completes the assessment.



When you are ready to view your group report, click **View Report**. A new tab will open and the Transform™ report generator will create your group report. You may regenerate the report any number of times. As new data is submitted, a label "New data" will appear alongside the report. This alerts you that additional data has been received since the report was last generated.

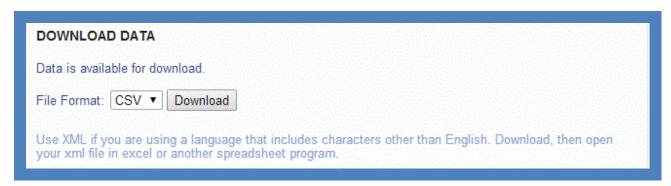


Copyright © 2014 by Mind Garden, Inc. www.mindgarden.com. Updated: 30-Jul-15

Download Data

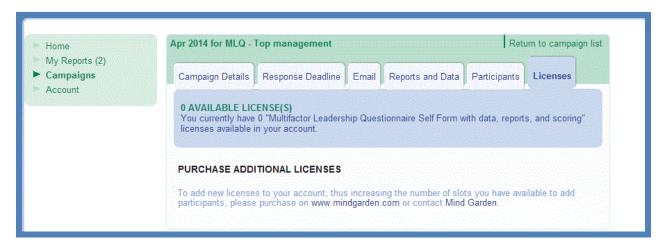
You have two options for the download file format: CSV and XML. CSV is compatible with many English language statistics programs including Microsoft Excel and SPSS. If you are using a language that includes characters other than English, download the XML file. Click **Download** to download your data in your chosen file format.

Note: XML will not automatically open with Microsoft Excel. If you wish to open an XML file with Microsoft Excel, first open a blank Excel spreadsheet and then go to File \rightarrow Open. Find and select your XML file in the window provided and click **Open** to access the XML file via Excel.



The data file containing all data collected for the campaign is recreated each time you download data. The file includes one line of data for each participant who completed the survey. The data includes raw data and raw scale scores.

LICENSES



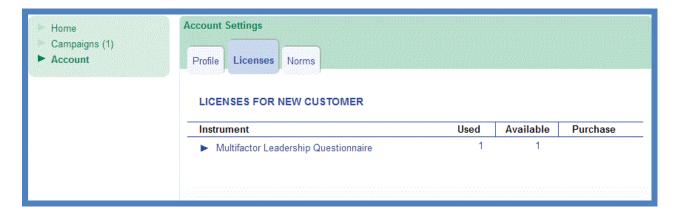
This tab instructs you on how to purchase additional licenses if you currently have none available for use.

ACCOUNT SETTINGS

To access account settings and licenses available, click the **Account** option in the left menu of your Transform™ Portfolio. In the Profile tab, click Update to change your name and/or email address. Click Change password to create a new password for this account.



The Licenses tab lists your license purchase/use history. The final tab, Norms, lists all the norms associated with this account and to which campaigns they are attached. Contact Mind Garden to add Norms.



SPECIAL SITUATIONS

I want to select the "Just Use the Mind Garden Email" option, but I want to enter my participant names without having the automatic email invitation go out immediately upon entering the names.

Steps:

- 1. After creating a campaign and setting your response deadlines, click on the Email tab. Select the option "I'll Send My Own Email to Participants" and click **Next/Update**.
- 2. Under the Participants tab, paste your participants' email addresses and names into the Import box and click **Import**. After verifiying that they are all correct, click **OK**.
- 3. You have now entered your participant names without triggering the instantaneous sending of the invitational email.
- 4. When you want Mind Garden to send the invitational emails, go back into the campaign and click on the Email tab. Change the option to "Just use the Mind Garden email" and click **Update**.
- 5. Go to the Participants tab and next to each participant's name, click the **Resend** button. This will send the invitational email. You may also contact Mind Garden to set up a "Resend All" option.

I want to input all data myself.

- 1. After creating a campaign and bypassing the response deadline, click on the Email tab. Select the option "I'll Send My Own Email to Participants" and click Next/Update. Now no emails will be sent from Transform[™] to your participants.
- 2. Under the Participants tab, input your participants' email addresses and names into the Import box and click Import. After verifying that they are all correct, click OK. If you do not have names and/or email addresses for your participants, you must create your own (e.g., Patient 1 one@patient.com).
- 3. Scroll down to Current Participants on the Participants tab and click the name (in green) of one of your participants. The self-assessment for this participant will appear in a new tab. Enter the data by clicking through the assessment (or use the Tab and Arrow keys for quick input).

KEY TERMS

Administrator: The person(s) in charge of setting up the assessment(s), sending emails, and importing

participants' names and email addresses into the Transform™ system. An administrator can also be a participant. The administrator's name appears in invitational emails to participants.

If any issues arise, the administrator should contact Mind Garden.

Assessment: The questionnaire, survey, or inventory that is completed by the participant.

Basic Campaign: A campaign that is using a non-multi-rater instrument. Most Mind Garden instruments are

"self rating only", meaning that one person assesses themselves or an un-named individual.

Campaign: At its simplest, a campaign is a grouping of participants. You can have as many or as few

> participants in a campaign as you wish. You can create as many campaigns as you need at absolutely no charge! We recommend you treat campaigns as an organization tool. Try breaking up your participants up by Job Title (e.g., "Top management" or "Supervisors") or by Work Group (e.g., "Store #855" or "Product Development Team"). This will allow you to visualize your different groups more clearly and help you analyze large quantities of data. You

can easily combine data from multiple campaigns outside of our system after download.

Instrument: The product as a whole (e.g., Multifactor Leadership Questionnaire 360, Coopersmith Self-

Esteem Inventory, Areas of Worklife Survey), including manuals, workbooks, and other

accessory documents.

Each license gives permission to administer the specified assessment one time (e.g. if you want

to use the Maslach Burnout Inventory (MBI) to assess 20 individuals, you must purchase at least 20 MBI licenses). You can purchase licenses for Mind Garden products on our website

(www.mindgarden.com).

Multi-rater: A number of Mind Garden instruments are multi-rater, or self/observer assessments, meaning

that several people rate a specified, target individual (e.g., "Becky B. Boss listens to me" versus

"My boss listens to me"). A multi-rater campaign is a campaign using a multi-rater instrument.

Participant: A person who completes an assessment. In a multi-rater instrument, the terms "Leader" (you

are being rated by others) and "Rater" (you are rating someone) are often used instead of

"participant" for those who are completing an assessment.

Report: A PDF document summarizing personal and/or group scores on the assessment. The report

often includes strategies for developing desired behaviors. Reports must be purchased and

are available to participants at the administrator's discretion.

CONTACT MIND GARDEN

If you have additional questions, please look through our Frequently Asked Questions or "FAQs" at www.mindgarden.com/content/23-faq. You may also contact Mind Garden online, by mail, telephone, or fax.

Online: www.mindgarden.com/contact-us

By mail:

Mind Garden, Inc. 855 Oak Grove Ave., Suite 215 Menlo Park, CA 94025 USA

Telephone: (650) 322-6300

Mind Garden employees are generally available by phone Monday - Friday during normal business hours (9am - 4pm, Pacific Time), excluding major holidays recognized by the United States.

Fax: (650) 322-6398

"Like" and "Follow" us:







