TUTORIAL:

CREATING A MULTI-RATER CAMPAIGN with REPORTS and DATA DOWNLOAD

CONTENTS

INTRODUCTION

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

This tutorial provides step-by-step processes for creating and managing multi-rater campaigns with reports and data download. This tutorial will be most beneficial to customers who have purchased Transform™ Survey Hosting for a multi-rater instrument and are ready to begin collecting data. **If you have purchased Transform™ Survey Hosting for a non-multi-rater instrument, please reference the "Basic Campaign" tutorials available on Mind Garden's website. If you are a participant, please reference "Tutorial – Using Mind Garden's Transform™ System" document also available on Mind Garden's website.**

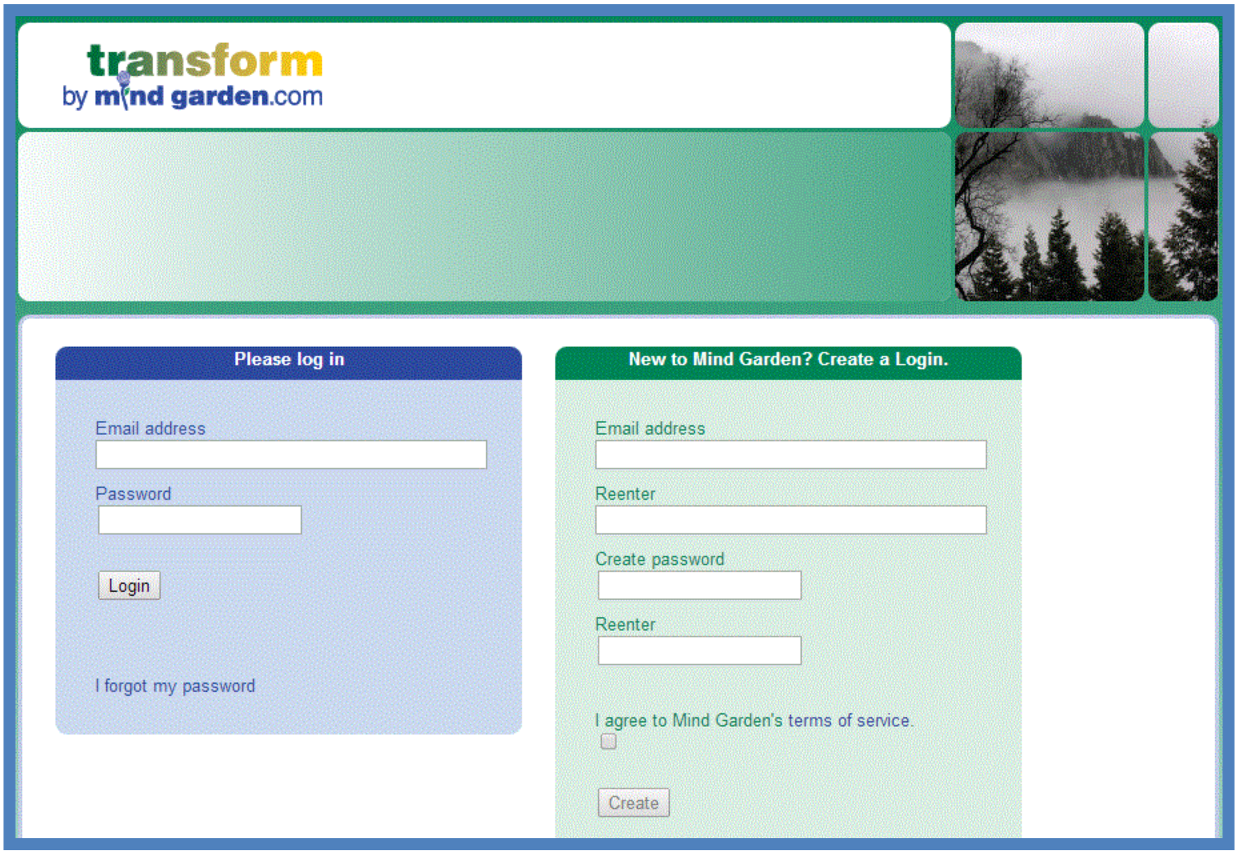
Please read through the entire chapter of interest – many "exceptions to the rule" will be detailed at the end of each chapter. Still have questions? Contact Mind Garden – we're happy to help!

Kind hearts are the gardens,
Kind thoughts are the roots,
Kind words are the blossoms,
Kind deeds are the fruits.

- Anonymous (19th century)

HOW TO LOGIN

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

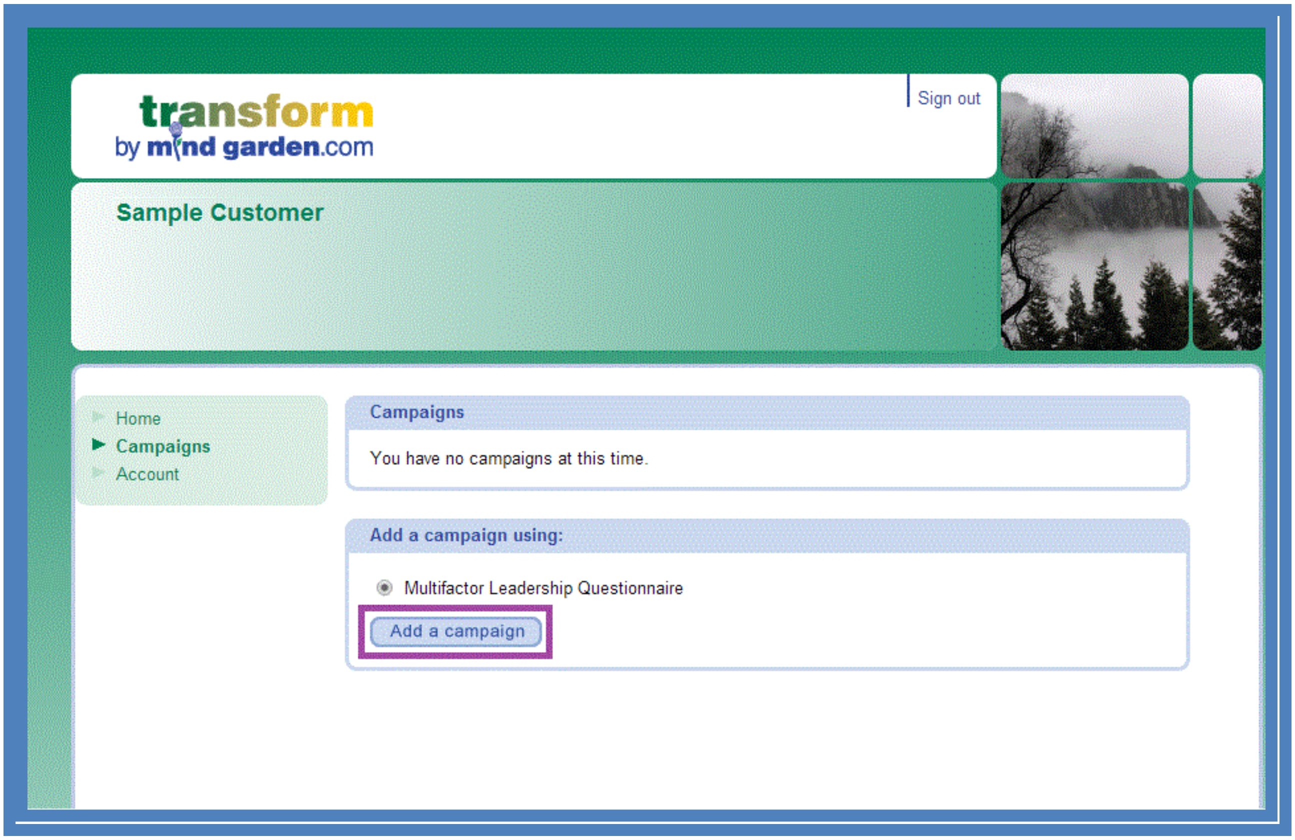


New users: Use the **green box** to enter your email address and create a password. Check the box below to agree to Mind Garden's terms of service, and then click **Create**.

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 password and login, you may change the password to one of your choice via the Account menu.

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

CREATING A MULTI-RATER CAMPAIGN

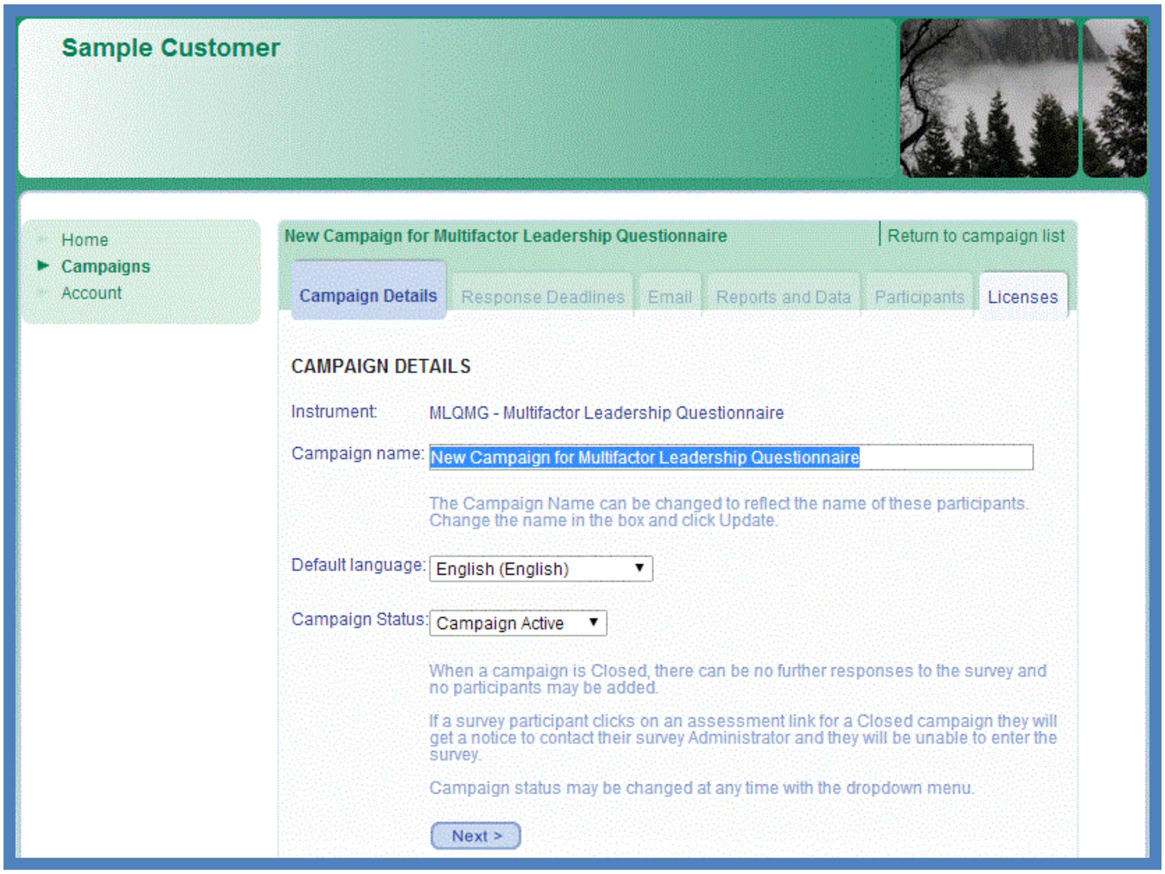


You will need to purchase Transform™ Survey Hosting for an instrument before you create a campaign, either through www.mindgarden.com or by contacting Mind Garden. You will need to create a campaign before you can use your purchased licenses.

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".

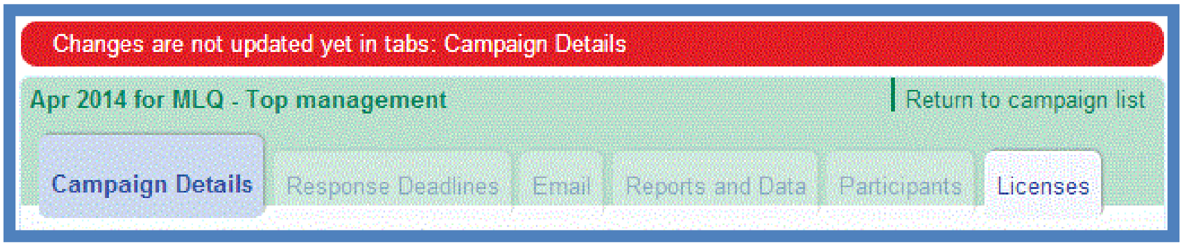
Default Language determines which language your participants will automatically view the assessment and which language you will view your report(s). Note: not all reports are available in the languages listed under Default Languages – please contact Mind Garden for which languages are available for your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

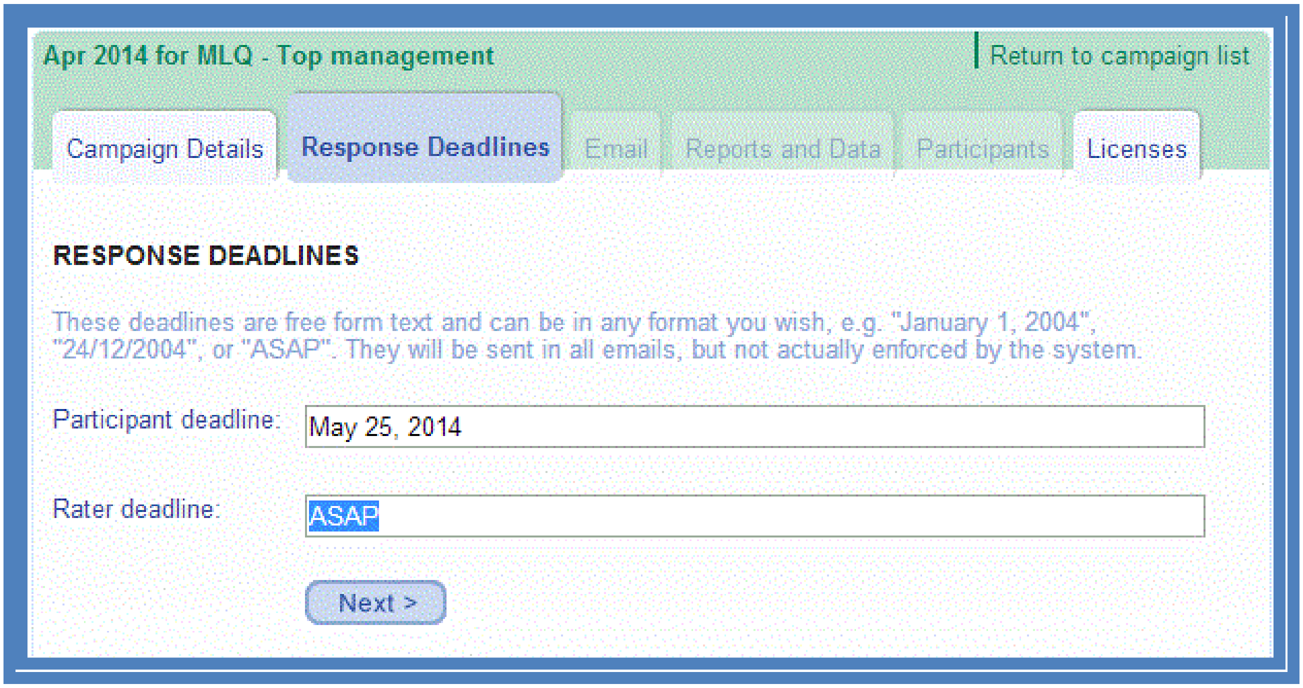
There is no limit to the number of campaigns you can create, but you can use only one instrument in a campaign.* If you wish to use a different instrument, you must purchase Transform™ Survey Hosting for that instrument and set up a separate campaign.

***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



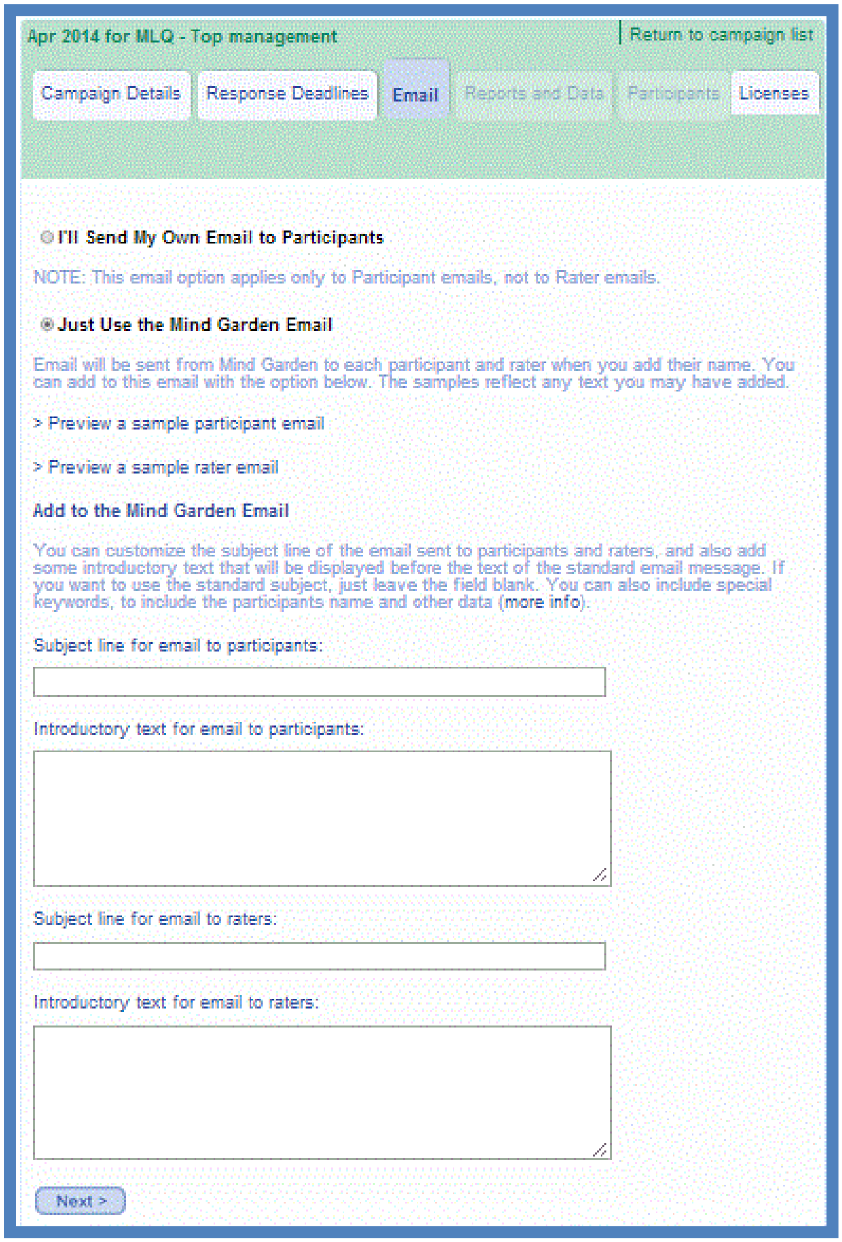
In the **Participant deadline** and **Rater deadline** boxes, enter the date that you would like the participants and raters to complete the assessment. The default setting for response deadlines is ASAP. We recommend you set an actual date if possible in order to maximize your response rate. Near-term dates are better than long term dates since most people will quickly respond to a near term date rather than setting aside the response task for a later time and forgetting to complete the assessment.

These response deadlines are 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 and all raters 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).

Note: Rater emails will always be sent from "invite@mindgarden.com" immediately upon entering the names and email addresses of the raters **regardless of the email option you select**. Raters will have their own unique link and will not be required to login.

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 or a sample rater invitation email.

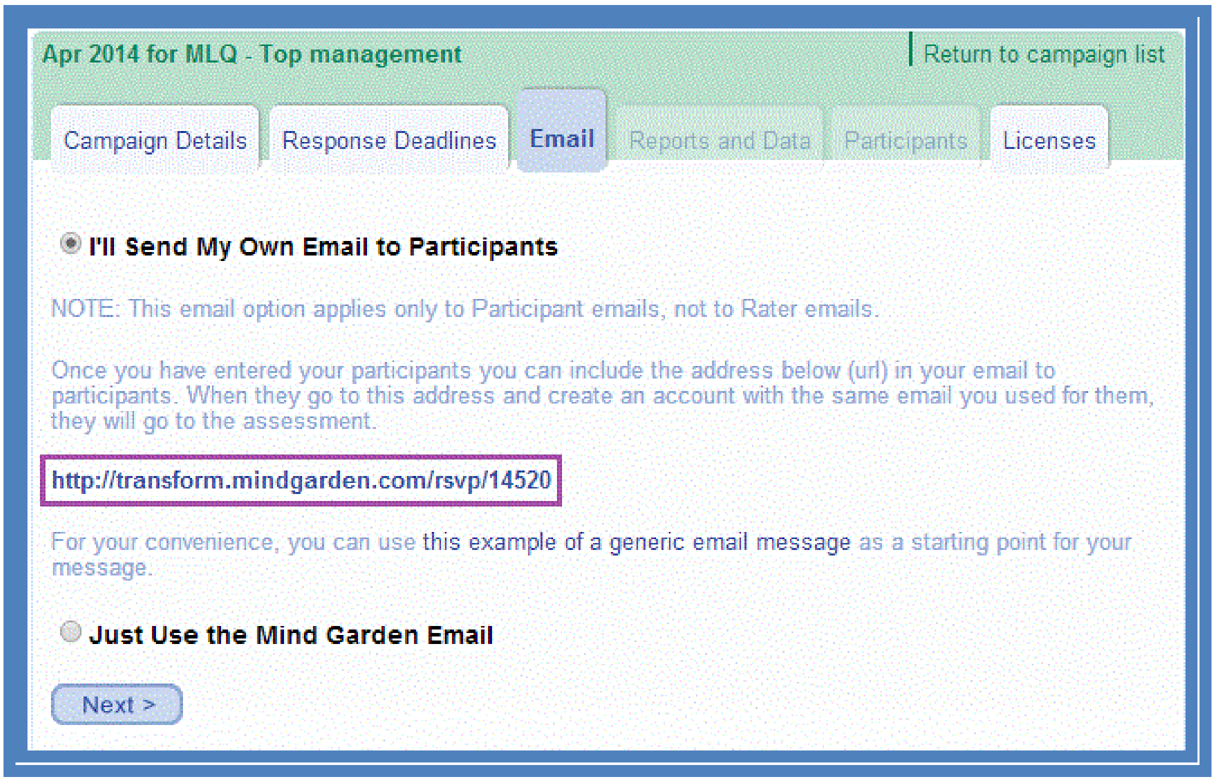
With this option, it is important to note that the email message will be sent automatically when you enter the names and email addresses of participants into the system on the Participants tab. Click **Next** to save your changes and to move to the next tab.

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



The "I'll Send My Own Email" 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 your 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://www.mindgarden.com/rsvp/####). The #### will be numbers unique to your campaign. Make sure to use the link in your own 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 go 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**.

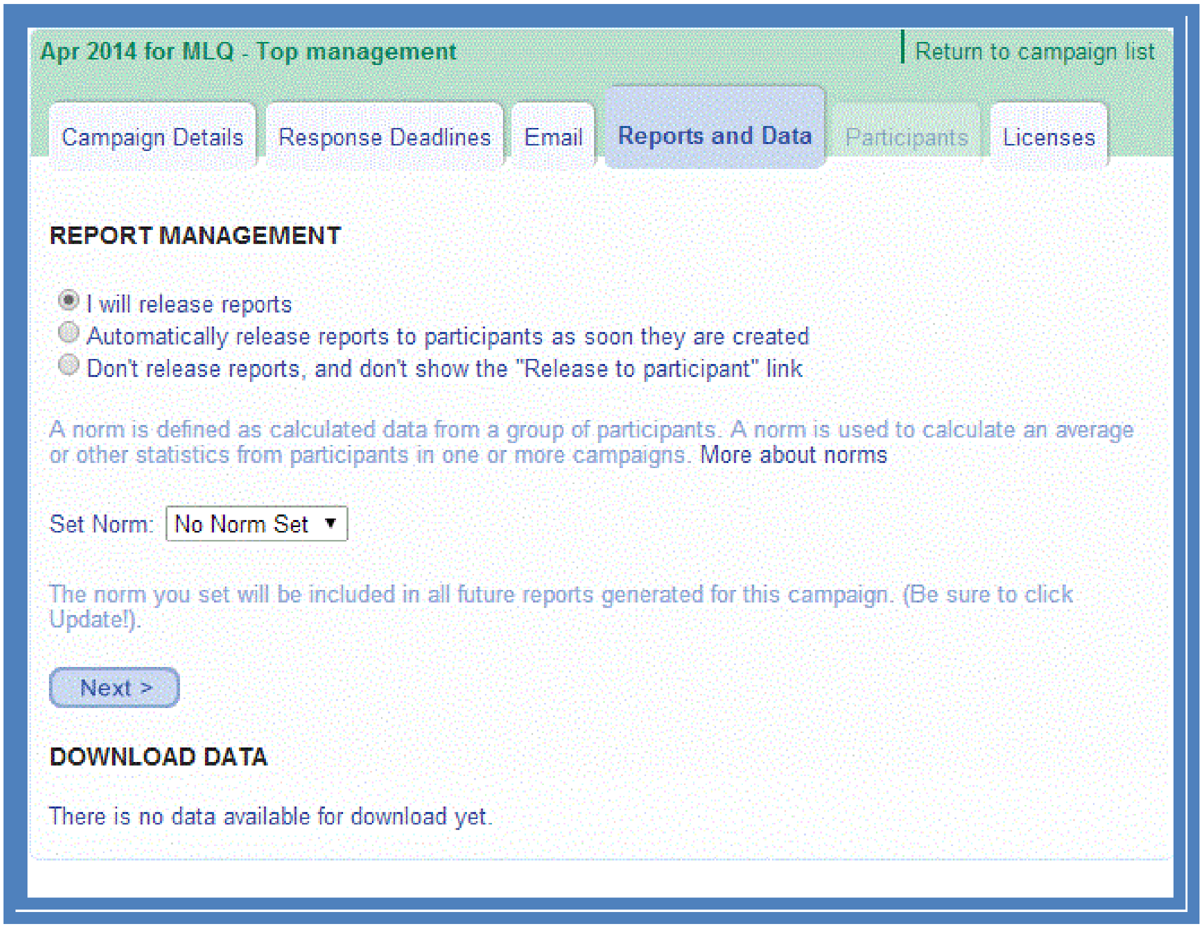
3) Enter your participants' names and email addresses in the Participants tab.

4) Create your own email including the login link and response deadline and send it to your participants from your own email program.

Rater Emails

Rater emails will always be sent from Mind Garden immediately upon entering the names and email addresses of the raters (this is true regardless of the Email option you select). Raters will have their own unique link and will not have to login. If you want to add text to or customize the subject line of the rater email, you must add the text before the raters are added using the "Just Use the Mind Garden Email" option.

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 report is requested.

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 different 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 requested.

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 cross-campaign comparisons 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™ account. Once Mind Garden adds the norm to your account, you can set the norm to your campaign(s). Be sure to click **Update** after any changes!

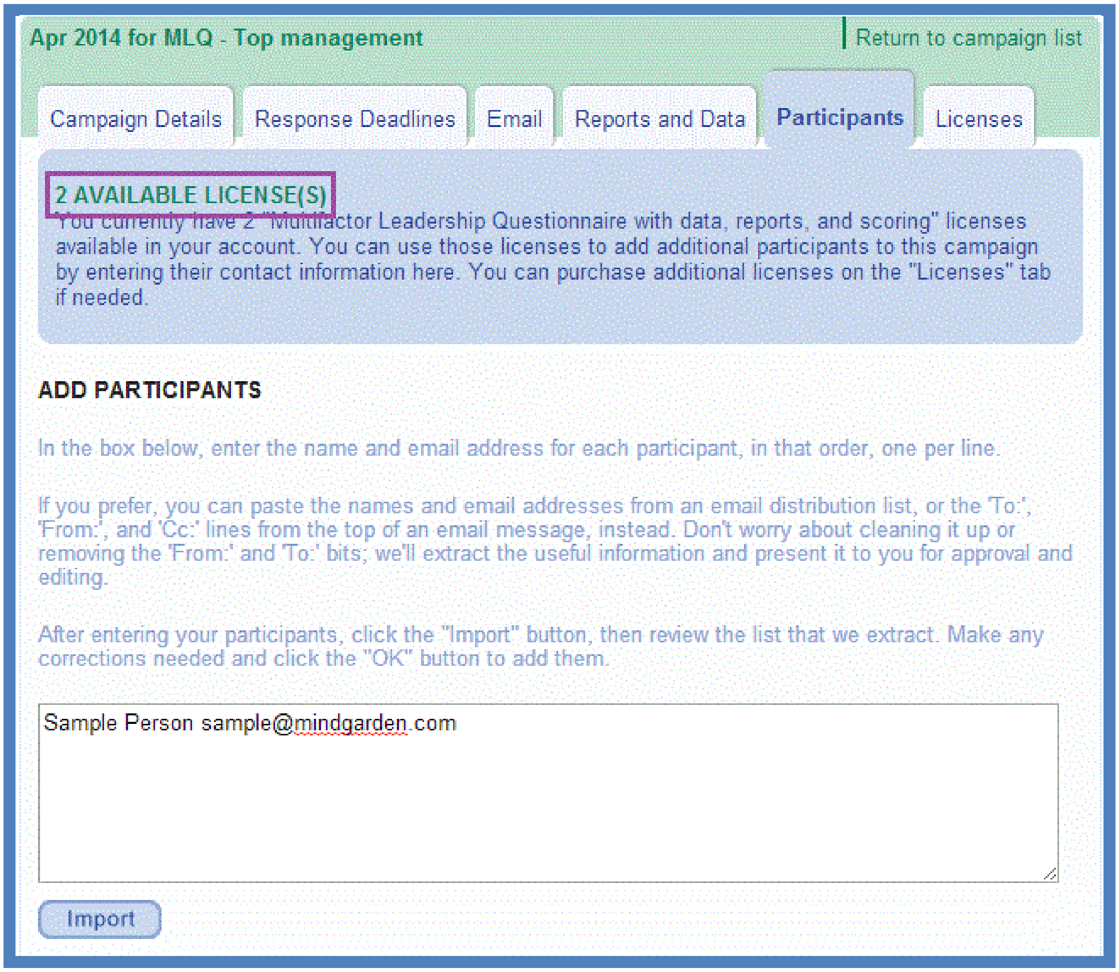
If you do not wish to use a norm on this campaign, make sure **No Norm Set** is selected in the **Set Norm** option.

Click **Next** to continue.

Download Data - No data available

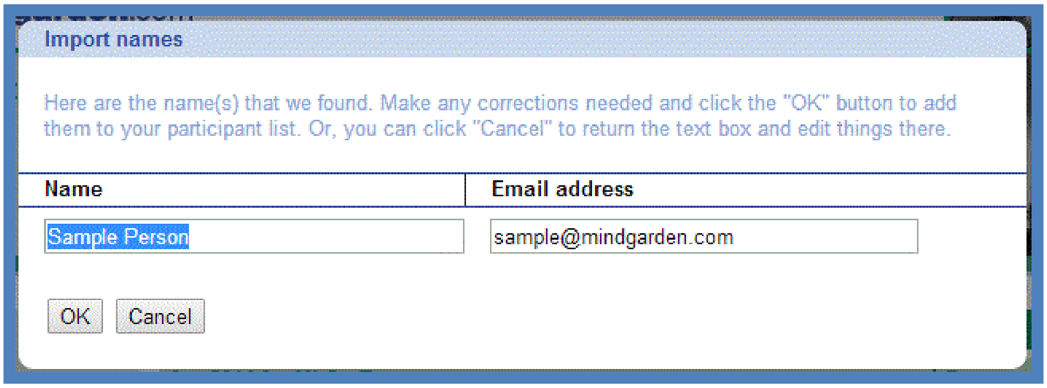
Download Data is where you can access your data once it becomes available. If you see the message "There is no data available for download yet," none of your participants or raters have completed the assessment. Once a participant or rater has completed the assessment, this tab will change to allow you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

ADDING PARTICIPANTS

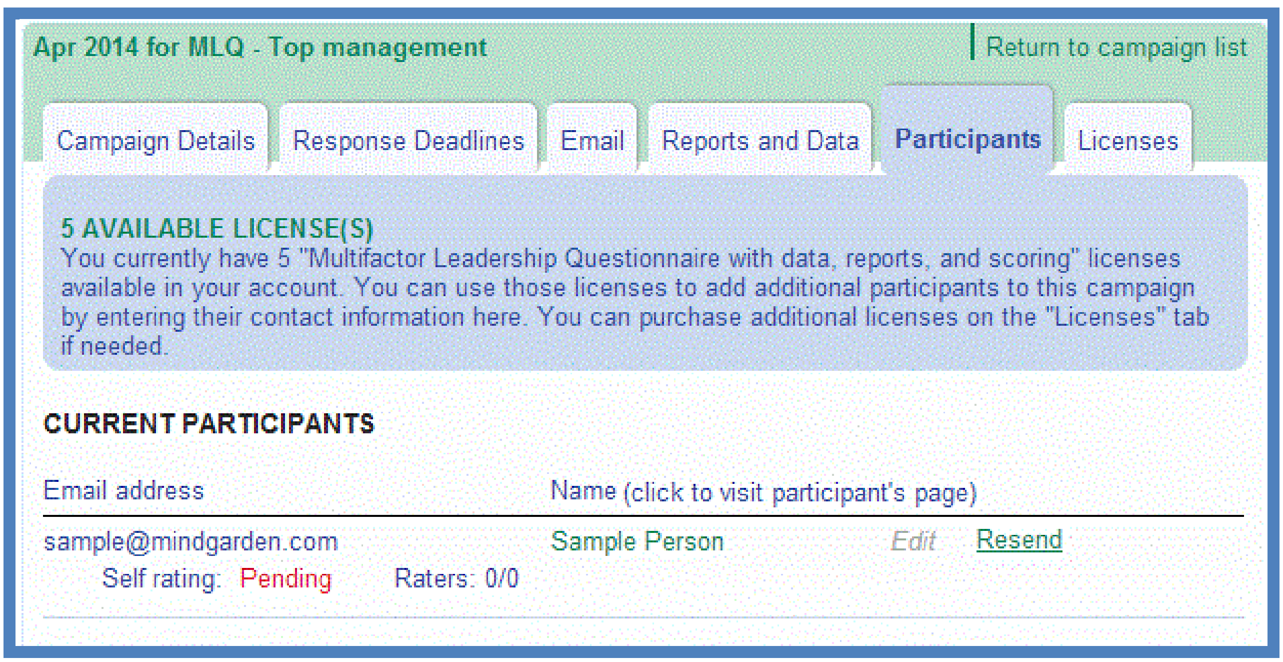


You must have data or report licenses available in order to add participants (the number of available licenses is displayed at the top of this page). You can share licenses for a given instrument among several campaigns. If you need to purchase additional licenses you can do so via www.mindgarden.com.

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**.



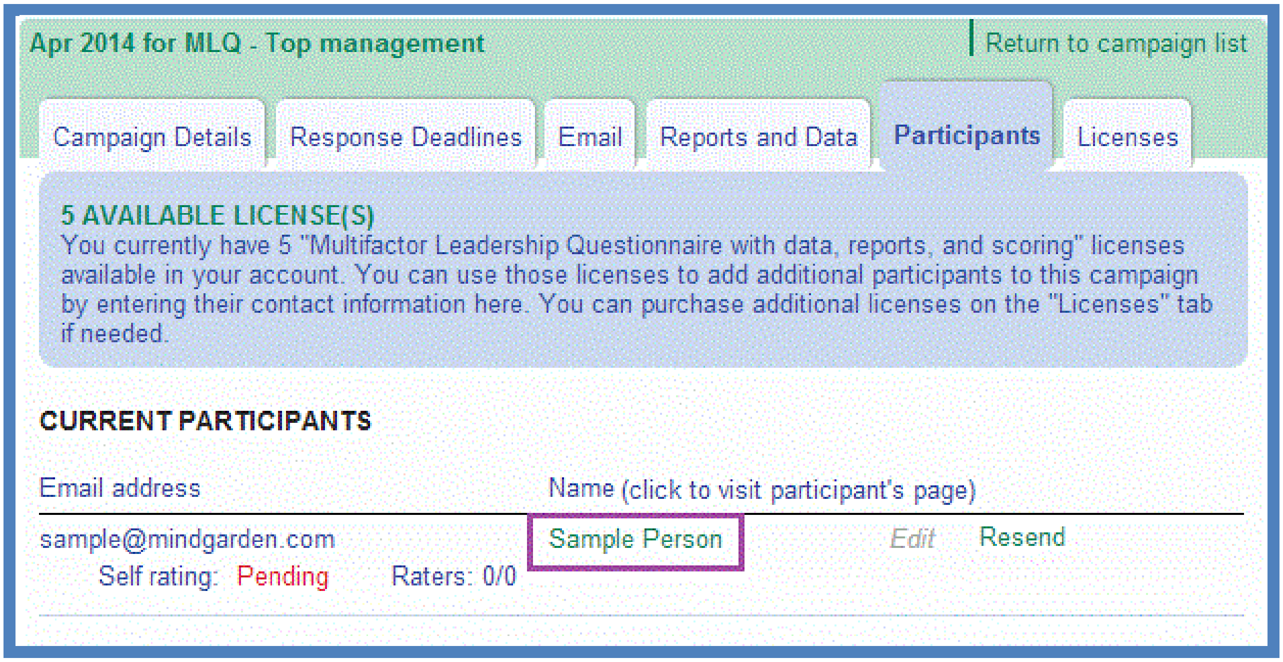
After you click **Import**, a new window will appear. You can make corrections to the names and emails as needed in this window and then click the **OK** button. If you click the **Cancel** button, you will be taken back one step in the process to the Import box with all email addresses and names in 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 if they have not completed their self rating. Note that if you have selected the "I'll Send My Own Email to Participants" option, the **Resend** button will not appear – you must send your own reminder emails.

ADDING RATERS



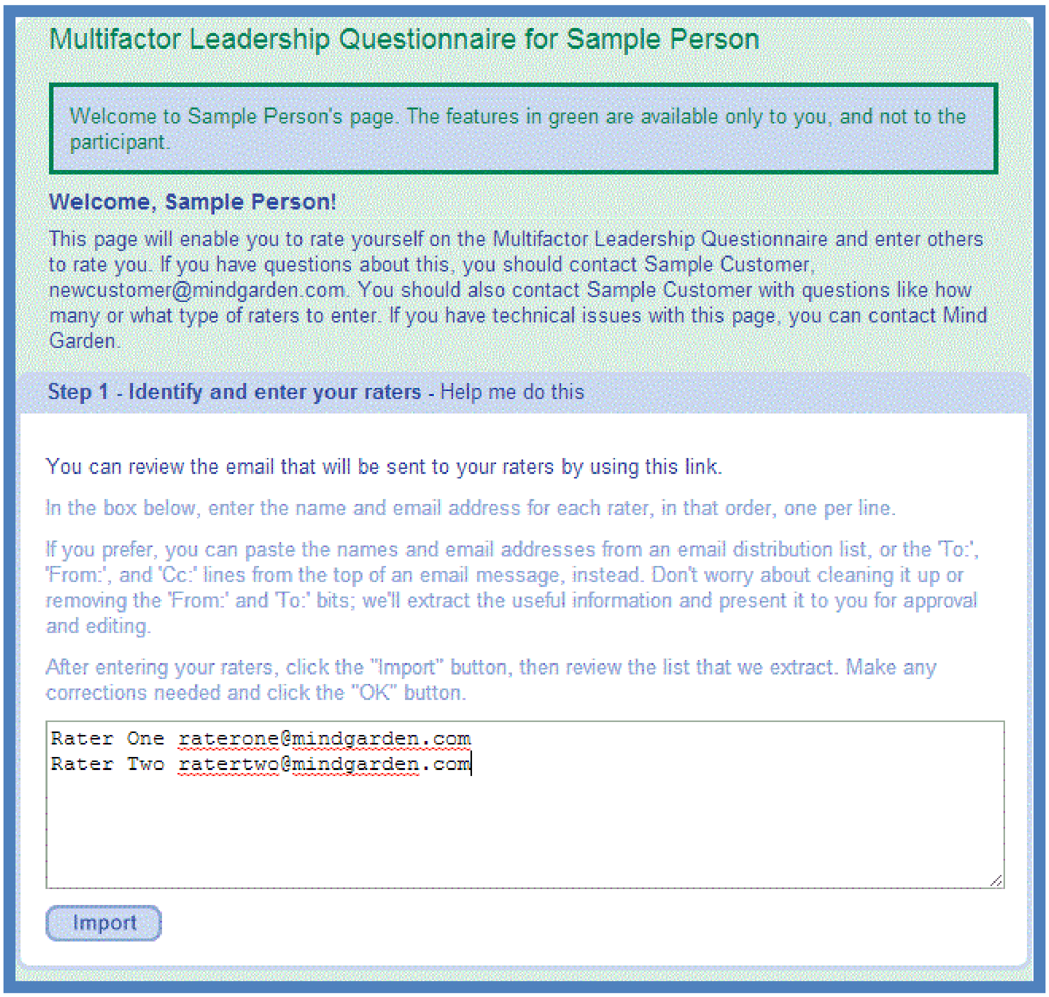
If you wish to enter the raters for your participants instead of the participants entering the raters themselves, click on the name of the participant under Current Participants to be taken to the participant's page. Follow the instructions in the **Participant's Page** chapter of this tutorial to add raters. The **Add Raters** process is the same, whether the administrator or participant does it.

Important: Please see the Special Situations chapter at the end of this tutorial for information on how to prevent participants from viewing their raters.

PARTICIPANT'S PAGE

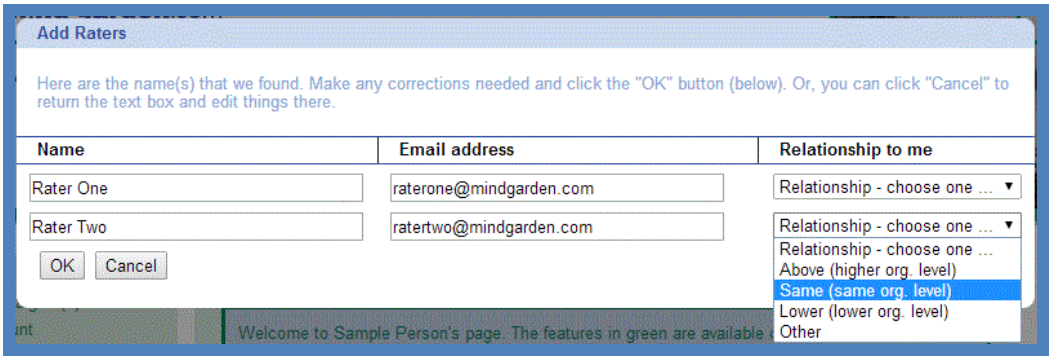
The Participant's Page is what the participant will see when they log in using the assessment link. Participants can add raters, access their self-assessment, view rater completion status, and verify their personal information on this page. Note that any green text will not be visible to the participant when they login to access their page. All blue text can be seen by the participant.

Step 1 – Identify and enter your raters



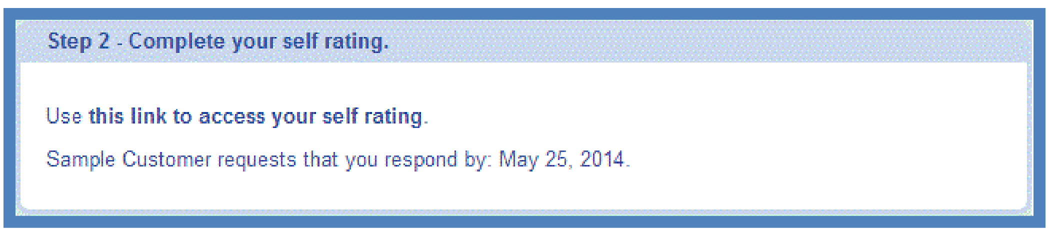
The first step in this section is to add the raters' names and emails. The input method for raters is the same as the input method for participants: first name, last name, email address – each separated by one space. Make sure to input each rater on a new line. When all raters have been added, click **Import**.

After you click Import, a small window will appear. Here, you can confirm or edit the names and email addresses of the raters you added. If applicable, you may be required to select the relationship of each rater to the participant. When you are finished, click **OK**. The raters' names will appear under **Step 3**.



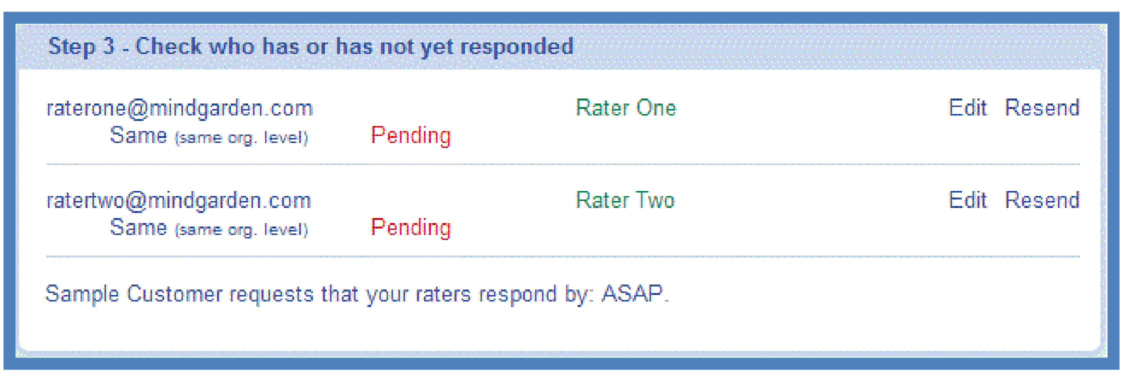
Step 2 – Complete your self rating

The second step on the Participant's Page is for the participant to complete their self rating. The participant response deadline will appear below the link.



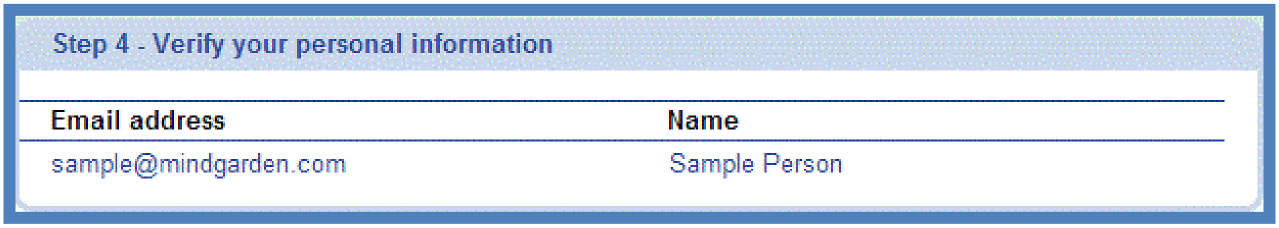
Step 3 – Check who has or has not yet responded

This section displays all the raters you (or the participant) have added and whether they have completed the assessment of the participant. Like under Current Participants, the rater list will display "**Pending**" if the rater has not completed the assessment or "**Complete**" if the rater has completed the assessment. The rater response deadline will appear below the list of raters. You may also **Edit** the raters' names, emails addresses, and relationship or resend the assessment invitation by clicking **Resend**. If you are unable to edit a name or email, it is locked and you must contact Mind Garden to request an edit.



Step 4 – Verify your personal information

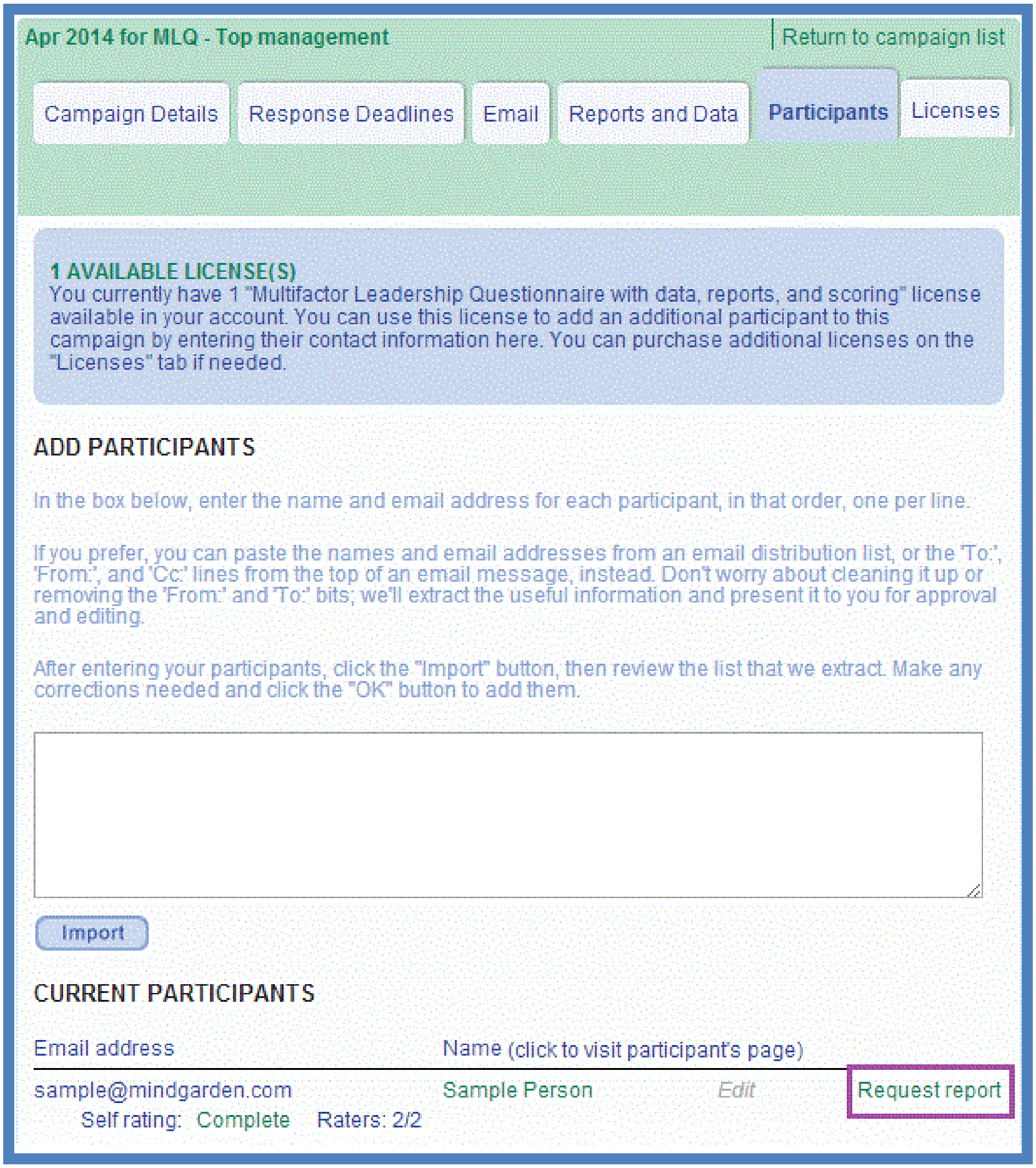
In this fourth step, the participant can review the email address and name used in this campaign. For any changes, you (the administrator) must contact Mind Garden.

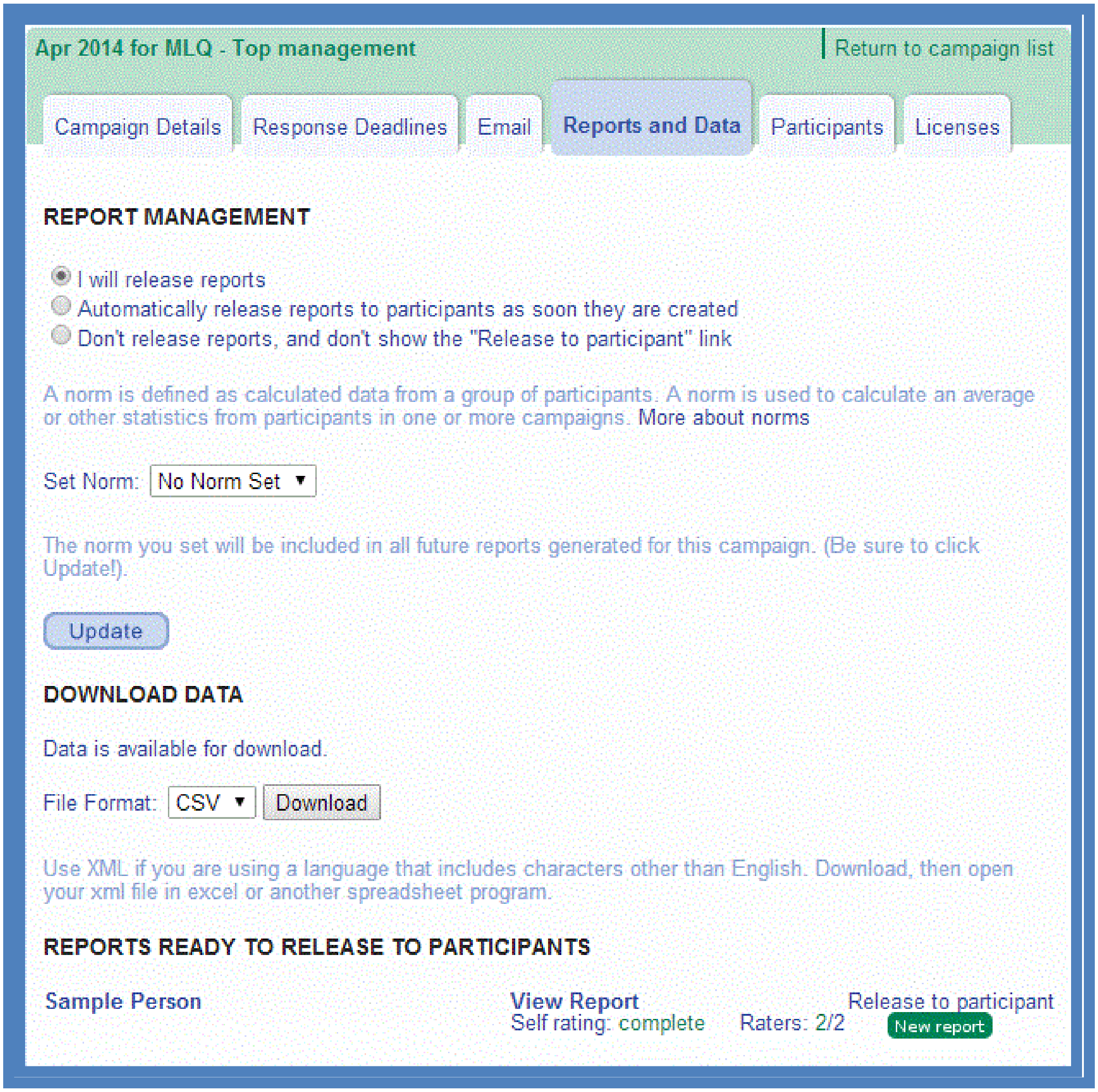


ACCESSING REPORTS AND DATA DOWNLOAD

Personal Reports

In order to view your participant reports, you must first request the report via the **Participants** tab. Scroll down to **Current Participants** and click **Request Report** next to the participant whose report you would like to generate. If you selected to automatically release reports to participants as soon as they are created, clicking **Request Report** will release the report to the participant by email notification with instructions on how to login and access their report. After the request, the report will continue to update as additional raters complete their assessments.



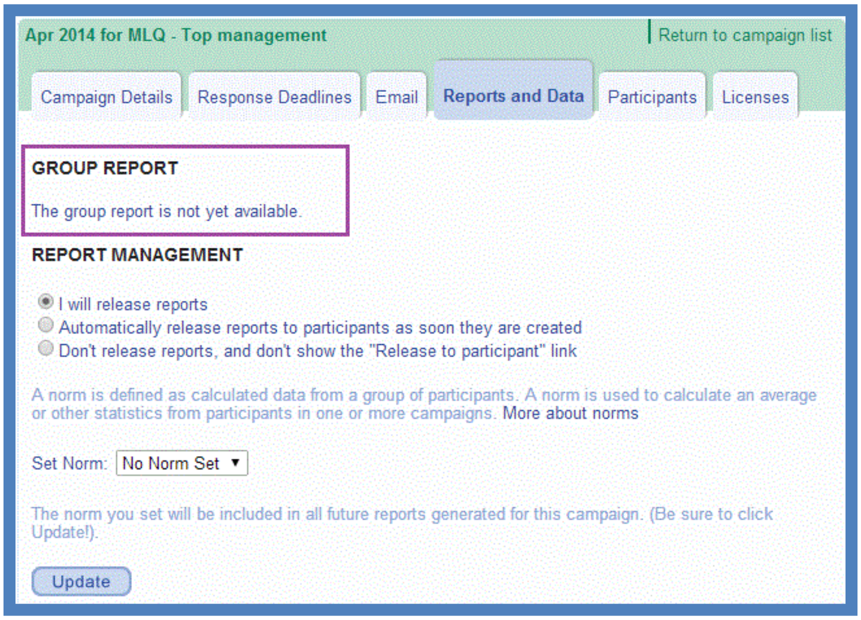


Next, go to the **Reports and Data** tab. It will be refreshed to show the participants whose reports you requested. Here, you can click **View Report** and/or **Release to participant**. If you choose to view the report, a new tab will open and the Transform™ report generator will create the participant's personal report. This may take several seconds to a few minutes depending on the report. If you wish to release the reports 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."

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 requested.

Group Reports

If you purchased a **Group Report**, you must first contact Mind Garden to add the Group Report to the campaign of your choice. Once this is complete, an additional area will appear in the **Reports and Data** tab. The Group Report will be available once one participant or one rater completes the assessment.

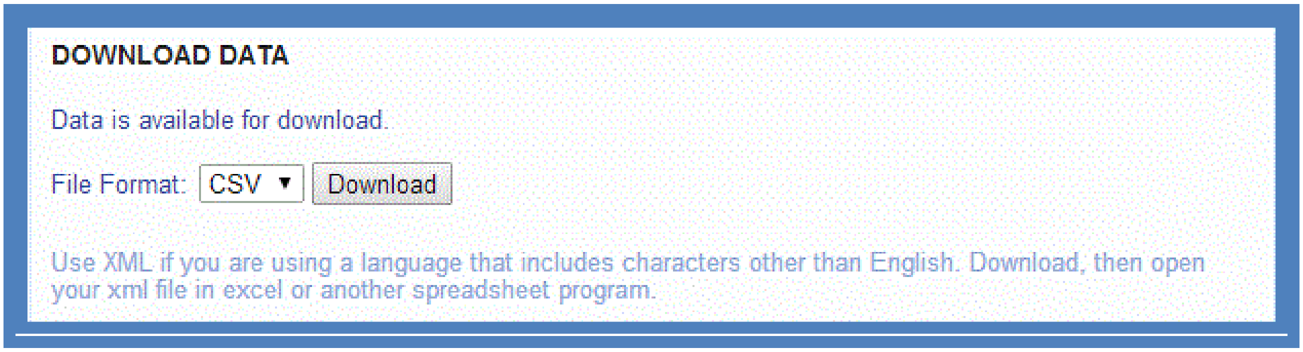


When you are ready to view your group report, click **View Report**. A new tab will open and the Transform™ report generator will create your group report.

Download Data

You have two options for the download file format: CSV and XML. CSV is compatible with many English language 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.

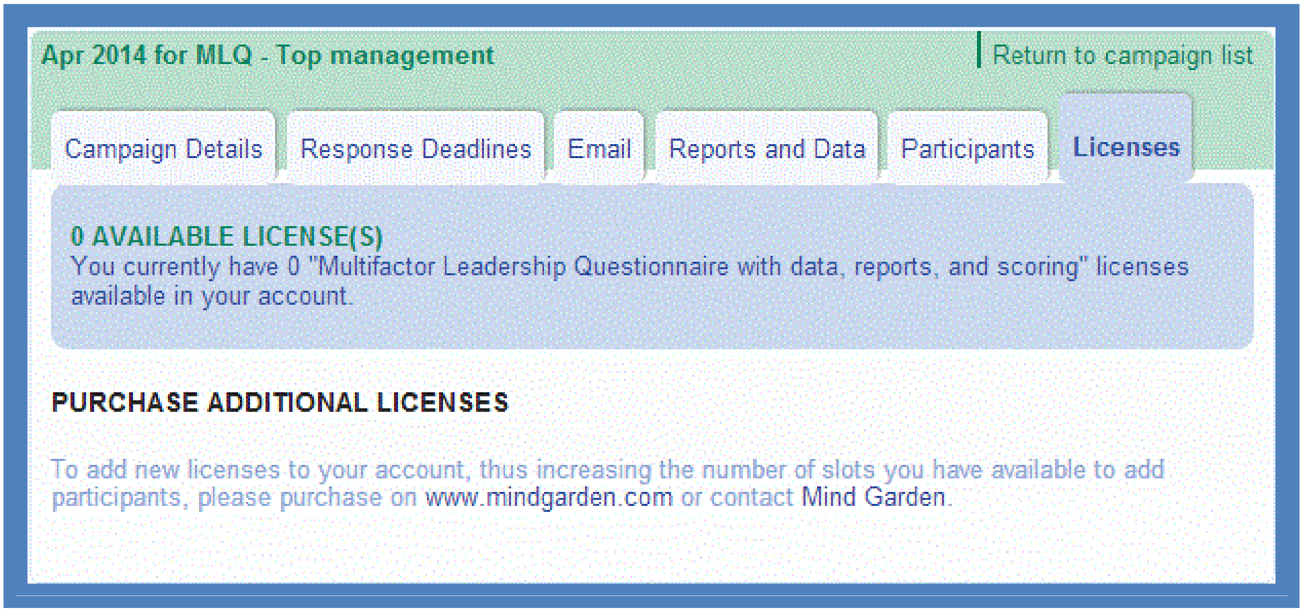
Note: XML will not automatically open with Microsoft Excel. If you wish to open an XML file with Microsoft Excel, first open a blank Excel spreadsheet and then go to File → Open. Find and select your XML file in the window provided and click **Open** to access the XML file via Excel.



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 and rater who completed the survey. The data includes raw data and raw scale scores.

Raters' names and email addresses are not included in the data file. Raters are only identified by organization level and who they rated. Participants' names and emails are included in the data file unless you have contacted Mind Garden to suppress this information.

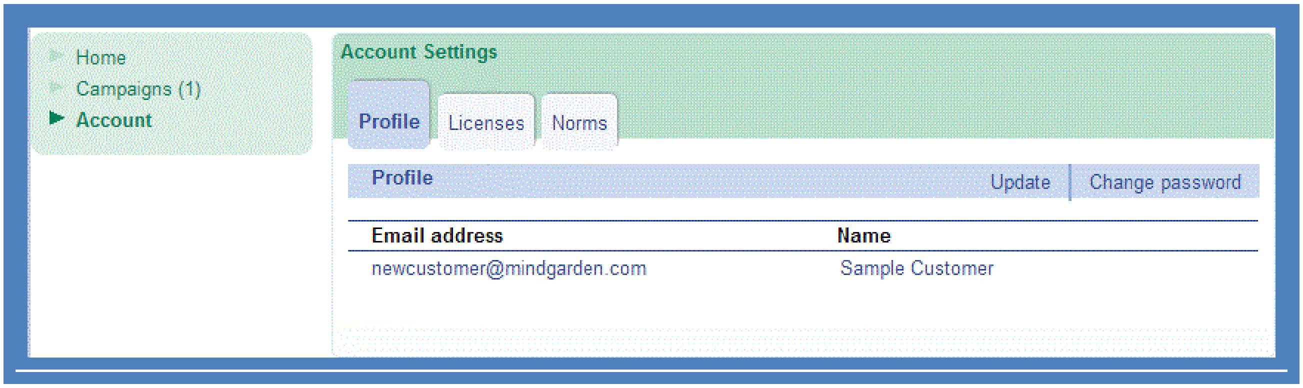
LICENSES



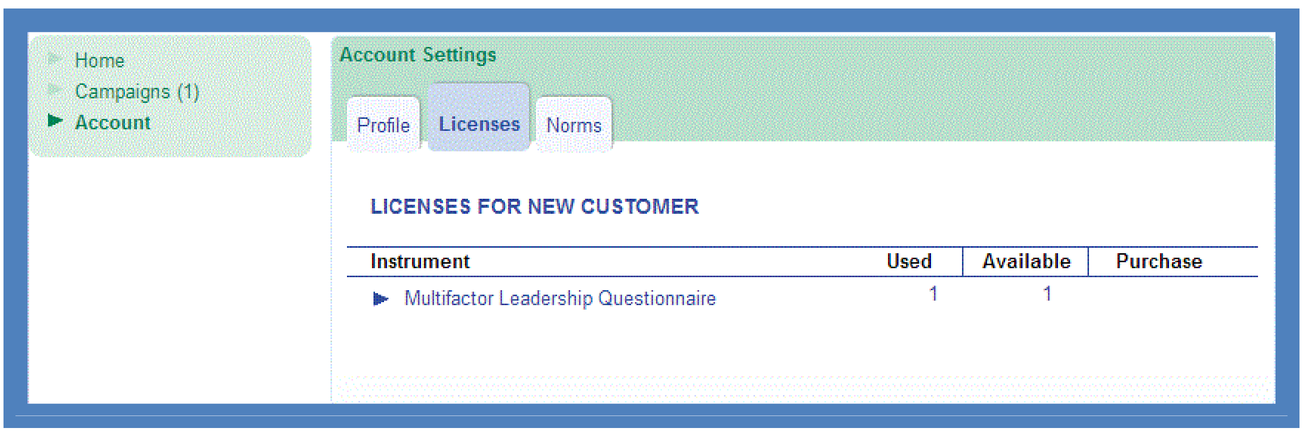
This tab instructs you on how to purchase additional licenses if you currently have none available for use.

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.



SPECIAL SITUATIONS

I want to keep my participants from seeing and adding rater names.

Steps:

1. From the Email tab in a campaign, select the “I’ll Send My Own Email to Participants” option. Click **Next/Update**.

2. Enter your participant’s names in the import box on the Participants tab. Import them and click **OK**.

3. One at a time, click on a participant’s name to enter their Participant’s Page. On their page, go to Step 2 “Complete your self rating” and click on “**Use this link to access your self rating**”. A new tab will open with the actual participant questionnaire on the screen. Copy the URL from the top of your web browser. Paste this URL into an email message to the participant. **Be careful you send the appropriate unique link to the appropriate Participant.**

4. Repeat **Step 3** for each participant.

I do not want my participants to take the self assessment. I want only rater feedback.

Mind Garden offers Rater Only versions of many multi-rater instruments including the *Multifactor Leadership Questionnaire*, *Authentic Leadership Questionnaire*, and *Psychological Capital Questionnaire*.

Steps:

1. From the Email tab in a campaign, select the “I’ll Send My Own Email to Participants” option. Click **Next/Update**.

2. Enter your participant names in the import box on the Participants tab. Import them and click **OK**.

3. Obtain a list of the email addresses, first and last names, and reporting levels of the raters for each participant (one rater per line). Copy and paste the raters’ emails and names into the Import box as one big group. Click **Import** and input the rating level for each rater in the window provided. Click **OK**.

4. You have just sent invitational emails to your raters. You can return to each participant’s page by clicking on their name under Current Participants to check the status of their raters. Click the **Resend** button next to the raters’ names to remind them to complete the assessment.

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 invitation 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 your response deadlines, 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. This will take you to their Participant Page.

4. Under **Step 2**, click "Use this link to access your self rating." 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).

5. To enter rater data, first go to **Step 1** and input the names and **fake email addresses** for raters who will assess this participant and click **Import**. You must use fake email addresses because the Transform™ system will automatically send an invitation email to raters when you finish importing. A good example of a fake email address is "one@rater.com". Don't use @gmail.com or any other real domain name – you may accidentally send an invitation to a real person! Use the raters' names to identify them. After you click **Import**, select the relationship each rater has with this participant in the window provided and click **OK**.

6. Scroll down to **Step 3**. The raters you imported are listed here. To access a rater's assessment, click the name (in green) of one of the raters. The rater assessment 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.

License: 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.

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