Managing Sub-Users

Task	Scoring Organizer	Talent Assessment Portal (TAP)
Creating a sub-user	Account page > click *Add Administrator* > enter digits to complete the new Administrator ID for login > enter password for new Administrator account (they will be prompted to change this password when they login) > enter Email > enter Description > select tools they will have access to > ensure the status is set to *Active* > click *Save*	My Account page > click *Add New Account* > enter account name and email address > select products and tools to make available to sub-user > click *Save* *Note: Sub-users can only be added if they have been certified on the tool and are active in the MHS system.*
Giving sub-user uses / tokens	By default, Multi-user accounts are set-up to Share Uses. All sub-users have access to the uses purchased by the Multi-user account manager. To control the distribution of uses purchased: Account page > select *No* for the Share Uses setting > click *Save* Click *Manage Uses* to navigate to the Uses page > Click *Transfer* > select where to transfer the uses from > select where to transfer the uses to > in the Transfer Uses column, enter the number of uses to transfer for each tool > click *OK*	Distribute tokens: Home page > click *Manage Tokens* > using the Transfer Tokens widget, select *My Account* to transfer from > select the sub-user to transfer to > enter the amount of tokens to transfer > click *Submit* OR Enable token pool: Home page > click *Account Settings* > select *Enable* for Share Token Pool > click *Save Changes*
Giving sub-user product access	When adding a new user, select tools they will have access to > ensure the status is set to *Active* > click *Save* For an existing user, click *Edit* next to Administrator ID > select tools they will have access to > click *Save*	For a new user: My Account page > click *Add New Account* > enter account name and email address > select products and tools to make available to sub-user > click *Save* For an existing user: Manage Accounts page > click *Edit* next to the relevant sub-user > select products and tools to make available to sub-user > click *Save* You can only enable access to products and tools that you have rights for.

Removing a sub-user	--	Manage Accounts page > click *X* icon to delete sub-user in table

Managing Inventory and Purchasing Forms (Uses)

Task	Scoring Organizer	Talent Assessment Portal (TAP)
NEW **Tokens**	n/a	Consumption on TAP is done at report generation. Reports are generated using a *token* system. Tokens are purchased and redeemed for any report you choose. When you run out of tokens, you can still administer an assessment; however, you cannot generate any new reports until you have purchased additional tokens. *Note: Conversion of Scoring Organizer Uses to Tokens on TAP example – Personal Summary Report Use = 55 Tokens.*
Consuming a use / tokens	Uses are consumed when an assessment is scored. Regenerating a previously generated report does not consume an additional use.	Tokens are consumed when an assessment is scored. Regenerating a previously generated report does not consume additional tokens.
Buying uses / tokens	Account page > click *Manage Uses* > choose a report type and click *Purchase* > the MHS Online Catalog Shopping Cart opens > select *quantity* > complete checkout and payment To purchase Scored Datasets or Continuous Uses, contact MHS or your authorized MHS distributor.	Home page > Click *Manage Tokens* > using the Purchase Tokens widget, enter token amount to purchase > click *Submit* > complete checkout and payment
View pending forms	Groups page > select the relevant assessment group by clicking on the assessment group number > view existing access codes on Setup page	Manage page > Assessments tab to view table of *Pending* assessments (sent out but not completed) and *Completed* assessments (sent out and completed)
NEW **Sending reminders**	n/a	Manage page > Assessments tab > select relevant participants (must have status of *Pending*) > select *Send Reminders to Selected* from the "I would like to…" drop-down >

		confirm or edit email template > click *Send Reminder Now* > click *Done*

Administering Assessments

Task	Scoring Organizer	Talent Assessment Portal (TAP)
Sending a recipient an online assessment link	Groups page > select assessment group by clicking the assessment group number > click *Add Access* > User Access code is already displayed > assign password > select a tool from the drop-down > click *Save* Copy the User Access code and Password from the Setup page and send to respondents OR *Generate* under email column > copy text and then send to respondents via your own email	Invite page > click *Personal Invitation* > select language > organize participants into folder > enter participant's email and name > click *Add Participant* (repeat for additional participants > click *Next* > customize email template OR use default template > you can enter contact info to receive notifications and/or enter a link expiration date > click *Next* > review details > click *Send Email* *Note: You can also send an Open Invitation – a single link to complete the online assessment which can be distributed to multiple participants*
NEW **Enter responses**	n/a	Enter paper forms > enter participant details and select a folder > enter responses > click *Next*

Generating and Viewing Reports

Task	Scoring Organizer	Talent Assessment Portal (TAP)
Generating Reports	Groups page > click *Reports* > click the tool that respondents completed > click the type of report > to score all assessments in the assessment group, select *Assessment Group* OR to score individual assessments within the group, click *View List* in the applicable assessment group row and then select the	Report page > select Report Type > click *Select* > select participants > customize report template or select a template > click *Next* > review report options > click *Place Order*

	administrations to score > select from the available scoring options > click *Score Selected* > verify the options selected > click *Score* > view Receipt page > click *OK*	
View reports	Groups Page > click *Reports* > select *View Reports* > click *Open* in the Report column of relevant report > click *Save*	Report page > click *My Reports* tab > click the link(s) to view

Usage

Task	Scoring Organizer	Talent Assessment Portal (TAP)
View usage	Click *View Uses* > click *View* in Uses History column for type of use > view Uses History page	Home page > click *Manage Tokens* > click *Product Usage* tab