Assessments 24x7
GLOBAL LEADER IN ASSESSMENT TECHNOLOGY

Admin Quick Setup Steps

Step 1: Purchasing Credits

(This step is only needed if you have 0 credits in your account, or if you need to purchase additional credits)

If your account has been set up to purchase assessments on a "**pay as you go**" basis, you will have access to buying them directly from your home page. If you are a "**billable monthly**" client, you will simply see the list of available assessments and will NOT need to complete this step.

To purchase:

1. Hover over the name of the assessment and click the "**Add Credits**" button. You can also click directly on the assessment name.
2. Enter the quantity desired and click "**Add to Order**." You can repeat this process if you want to bundle multiple assessments into one order.
3. To complete your order, fill in the credit card details below the total and click "**Submit Order**." Your credits will be immediately added to your account. Your credit card will also be immediately billed.
4. If you have put your credit card on file via the **Account** page, there will be an option to use your card on file. You can then click that option, followed by "**Submit Order**."

Step 2: Setting Up Groups (OPTIONAL)

Note: This is an organizational tool and is NOT needed to create Group Reports.

1. From the Managing Assessments tab on your top menu, click on **GROUPS**.
2. Once on this page, click on "**CLICK HERE TO ADD A NEW GROUP**".
3. To add a new group to your list, type in the name of the group and click "**Update**."

Step 3: Setting up an Assessment Access Link

1. From the Managing Assessments tab on your top menu, click on **Manage Assessment Links**.
2. To create a new Assessment Access Link, click on "**+ Add New Assessment Link**"
3. This will take you to the Assessment Link form where you will set the rules for this particular invitation you would like to create. If you need extra guidance, select the "Wizard" at the top of this form.
4. When finished with the setup, click "**Add Assessment Link**."
5. When you complete the setup of a link, you can provide that link to the Assessment Users via an email you send from your own email program. Simply copy and paste the full link that was created into your own email. Once they register themselves with this link, they will be taken to the assessment as well as sent the **Link Register** email you were able to edit when creating this link. You also have the option of using your account home page to send invitations/pre-register the user with the "**Send Assessments**" feature found on the left of your home page. This will send the **Dashboard Invite** email you were able to edit when creating the link.
6. Finally, you can see every user that has been registered on your Assessment Users page under the Managing Assessments tab on your top menu if any management of the users is needed once they have been registered.