



## How to use Skillsone.com

### Setting Up Your Personalized Assessment Web Site

1. In the top navigation, roll-over **My Account** and scroll down to select **Assessment Site** and then select **Edit Assessment Site Appearance** link.

2. Fill in all the requested information on the **Edit Assessment Site Appearance** page.

- In the **Client Access** section:
  - Enter the Client Login and Password that your clients will use to access the site.  
Note: All clients will log in using the same pre-assigned (by you) login and password.
- Enter the information you want clients to see on your personalized assessment site in the **Appearances** section:
  - If you would like to display your logo, make sure your logo file is no more than 500 pixels wide, and the total file size is no greater than 200K. The logo file must be saved as a JPG, PNG, or GIF (TIF or BMP will NOT be accepted). Remember, the smaller your logo file, the faster your web page will download. Once you've verified that your logo file meets these requirements, please attach your file.
  - Type in any desired message (2,000 characters maximum). Use the formatting toolbar to customize the greeting.
  - Select the checkboxes for the contact information you want to include (for example; company name, contact name, etc.). SkillsOne.com will pull this information from your **Account Information** section.
  - In the **Assessments** section, indicate which assessments you want to offer on your site by selecting the appropriate checkboxes in the Active column. You can select only assessments you are qualified to administer.
  - For **Client Viewable Results** assessments, indicate whether you want to make the results immediately available to clients online by selecting the checkboxes in the Users see results column.
- In the **Edit Assessment Site Notification & Redirection** section:
  - Enter your email address for notification when clients finish an assessment.
  - Enter the message you want sent to clients when they complete an assessment (for example, "Your facilitator has been notified.").

- If you want to direct your clients to a different site (your company site, for example) upon completion of an assessment, enter the URL for that site here (following the <http://www.xyz.com> format).

When you have finished setting up your assessment site, click **Apply Changes** at the bottom of the page to save your work. Then click **View your personalized site** to see how the page will appear to your clients. You must click **Apply changes** before viewing the site to see your most recent changes.

## Getting Your Client Started

Now that you have successfully set up your SkillsOne.com account and purchased reports, it is time to direct your clients to your assessment site. Use the following instructions as a guide;

Download client instructions for taking an assessment, (Download online assessment instructions for your clients)

Your **Assessment Site** is located at <https://online.cpp.com>

1. Client enters pre-assigned **Login** (case sensitive).
2. Client enters pre-assigned **Password** (case sensitive).
3. **User ID** is configured for the client upon completion of his or her first assessment (leave blank for now unless a client is returning to resume taking an assessment or to take a different one).
4. Client clicks **BEGIN** next to the appropriate assessment. Next, he or she is asked to provide some personal information. (Note: Only first name and last name are required; all other demographic information is optional.) Client clicks **SUBMIT** when finished.

As the administrator you can view client responses to the personal information questions by going to **Client Management** in the top navigation bar and selecting **View User Log**.

5. After completing the assessment, the client clicks **DONE**. (Note: It is helpful if clients write down the User ID provided upon completion of their first assessment. Having clients use their original User ID for all assessments can simplify tracking of results for the administrator.) To ensure clients are aware that their assessment(s) have been submitted, a message appears stating, "You have completed and submitted your assessment, and your facilitator has been notified."

## Purchasing Reports

1. Select **Purchase Reports** from the top navigation bar. Myers-Briggs (MBTI) reports will appear. To select another product, scroll over purchase reports from the top navigation bar and select the desired product.
2. To view your current inventory of reports, click **View Inventory**.
3. Enter the quantity of each report you wish to purchase in the appropriate quantity box. Remember, you can purchase only reports you are qualified to administer.
4. Click **ADD TO CART** to add the selected items to your shopping cart.
5. On the **Shopping Cart** page, you can change the quantity of or remove any items in your cart. Click **Update** after making any changes.
6. To purchase reports for other assessments, click **CONTINUE SHOPPING**. When your order is complete, click **PROCEED TO CHECKOUT**.

## Return Policy

Returns and exchanges must be sent to CPP via traceable methods and be accompanied by a Return Materials Authorization (RMA) number, which can be obtained by calling Customer Relations at 800-624-1765. Returns meeting the following criteria will be credited to your CPP account (no refunds). Account credits are good up to 12 months from date of issuance. Materials must be unopened, in reusable condition, accompanied by a copy of the original invoice, and returned within 60 days of the original invoice date. This policy also applies to electronic administrations. Kits and Money-Saving packages must be returned in their entirety. Test results are not returnable for credit. CPP retains the right to discontinue scoring of any prepaid answer sheet purchased over 12 months previous to scoring request. This also applies to out of print product. In order to expedite your credit, please obtain a return authorization number.

Remember to complete the reverse side of the packing list, including the reason for return and the return authorization number, and send with your package to this address:

CPP, Inc. Warehouse  
1150 Hamilton Court  
Menlo Park, CA 94025

## Generating Reports

Select **Generate Reports** from the top navigation bar.

Select from the drop-down menu the assessment for which you wish to generate a report.

Select a report to search for all your clients who have completed the assessment, or enter your client last name to search for a single client. If desired, you can narrow your selection by choosing Batch(s) or a date range. Click **CONTINUE** when you are ready to proceed.

Select the clients you wish to generate reports for and click **GENERATE TO PDF**.

You have the option to personalize the report cover page. Please type in the Facilitator Name, Company Initials, and Company Name. This information will appear on the cover page of generated reports.

Click the down arrow icon to download the client's report in Adobe® .PDF format to your computer.

You may also email your clients their results by clicking on the envelope icon. Enter an email address and a short greeting and click **SEND EMAIL** to send the .PDF-formatted report.

Note: With .PDF formatting, the report you print looks exactly like the report you see online regardless of what type of computer or browser platform you use. To view a .PDF file, you must have Adobe® Acrobat® Reader® (available as a free download from [www.adobe.com](http://www.adobe.com)) or Adobe® Acrobat® installed on your computer.

## Reported or Verified Type

Reported Type is the type that results from an administration of the MBTI assessment.

Verified Type is the type that you and your client determine to fit best as a result of a standard feedback process.

**Note:** Reports generated using Verified Type will not include the Preference Clarity Index (PCI) Chart.

## Batch Management

Client "batching" acts as a filing system, allowing you to group and organize your clients into "folders," and is recommended when you are managing numerous client data files. You may distinguish groups of clients by creating batches with relevant names such as "Workshop01" or a counselor's name: "Stevenson." Your batch names will appear in a drop-down menu on your personalized assessment site.

Setting up batches helps you manage your data and expedite the process when you are generating reports for groups of clients.

To create a batch, go to **Client Management** from the top navigation bar and select **Batch Management**. Select an assessment and click **ADD** next to it. Enter the desired batch name and click **OK**. Each new batch is added to the drop-down menu, enabling your clients to see batch options when they visit your assessment site. Batch names can contain letters, numbers, or a combination of both.

You can change and update your batch names whenever you wish. To change a batch name, go to Batch Management and click **EDIT**.

## View User Log

Go to the **View User Log** to see or update client demographic information, to see which clients have completed each assessment, to send reminder emails to clients who have not completed an assessment, to archive clients, and to open your client archive. To access **View User Log**:

1. Select **Client Management** from the top navigation bar and select **View User Log**.
2. Select the assessment from the drop-down menu (required).
3. Enter the client's last name (optional).
4. Select **SEARCH**
  - a. If you selected the assessment and entered a client's last name, a list of "like" client names will display. For example, if you entered the name "smith" (search is not case sensitive), all clients named Smith who have completed the selected assessment will display. If you also have clients named Smithson who have completed that assessment, those clients also will display.
  - b. If you selected the assessment but did not enter a client's last name, the list of all clients who completed the selected assessment will display.

You can use **View User Log** to

- See or update your client demographic information  
See or update a client's demographic information by clicking on that person's name.
- See which clients have not completed assessments  
Clients who have not completed the minimum number of assessment items required for accurate scoring will be designated with red type and the image of an envelope.
- Send a reminder e-mail to clients who have not completed assessments  
Send a reminder e-mail to a client who has not completed an assessment by clicking on the envelope image corresponding to the client's name, editing or completing the information in the pop-up message box, and clicking **SEND MAIL**.
- Archive clients  
Archive clients by selecting the corresponding checkbox in the column on the right side of the screen and clicking **ARCHIVE NOW**. To mark all the visible checkboxes, select Check All. To unmark all checkboxes on that screen, select Clear All.
- Open your client archive  
View your archived clients by clicking the blue **OPEN ARCHIVE** button in the top right corner.

## Key In Results

If you have a paper answer sheet and wish to score the assessment and generate a report on SkillsOne.com, you may manually enter the data on the **Key In Results** page.

1. Select **Client Management** from the top navigation bar and select **Key In Results**.
2. Click the tab for the assessment you wish to key in

3. Select the blue demographics button to input client data. You may also input the client user id and select demographics.
4. Once demographics are entered, the client name should appear to the far right of the demographics button in black text.
5. Input client item responses for the selected assessment. Hit **Save**
6. Follow steps for generating reports to obtain the scored PDF for the client.

## Inventory & Use History

This feature allows you to see how many reports are currently credited to your SkillsOne.com account and offers the option of purchasing additional reports.

1. Select **My Account** from the top navigation bar.
2. Select **Inventory and Use History**.
3. For each report in your account (for example, MBTI® Profile, Strong Profile), you will see an Item Description, Item #, quantity remaining, and Use History.
4. To view the Use History for a particular report, select the **Detail** link for that report.
5. The Detail screen will display transaction dates for all purchases, credits, returns, and reports generated (labeled Use), as well as the quantity remaining.
6. To view details of a specific invoice, select the corresponding **Invoice** link.
7. To view details of report generation or use on a specific date, select the corresponding **Use** link. You will see a list of clients for whom reports were generated on that date.

\* **Note:** All inventory counts are accurate. However, we regret that we are unable to display specific usage data prior to April 23, 2005.

## Invoices

This section provides a record of all your previous orders.

1. Select **My Account** from the top navigation bar.
2. Click **Invoices**.
3. Select the invoice you would like to view and/or print.

## Help

If you have questions regarding purchasing reports or technical issues, please call 800.624.1765, ext. 230, or send an email message to [custserv@cpp.com](mailto:custserv@cpp.com).

If you have general questions about the benefits of SkillsOne.com, please contact [SkillsOne@cpp.com](mailto:SkillsOne@cpp.com).