Internet Assessment System

Program Administrator User Manual

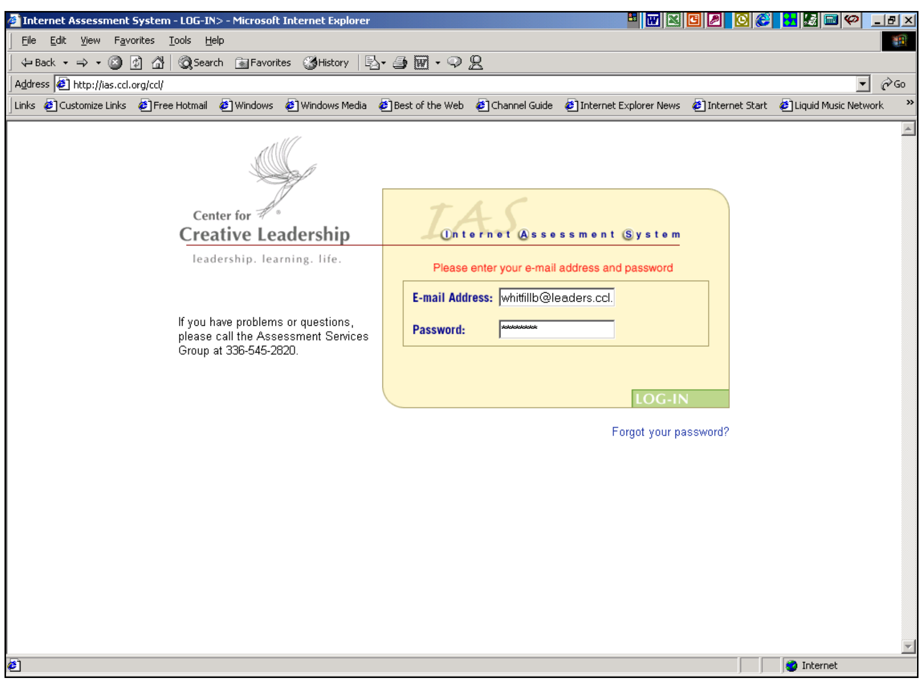


Table of Contents

➢ Section 1: Introduction to Internet Assessment System

Section 1.1 What is IAS?

The Internet Assessment System is an online tool to help administer assessments for CCL Programs. As a Program Administrator you will be able to use IAS to track the status of your programs and participants. You also have the ability to communicate with CCL and the participants via E-mail and Journaling.

Some of the functions IAS performs are:

- Stores status information about online entry or scanned paper documents in a central location.
- Facilitates the distribution process.
- Provides easier access to status information.
- Provides avenues for communication.

Section 1.2 Who Uses IAS?

- **Participants** who are registered and confirmed for an event/program.
- **Raters** who have been selected to rate participants.
- **CCL Administrators (CASG)** who have access to IAS administrative functions.

  Note: CASG is the Client and Assessment Services Group within CCL. This group manages participant assessments for all CCL programs.

- **Program Administrators** have access to administrative functions such as:
    - **Tracking Program Status**
    - **Tracking Participant Status**
    - **Communication with participants and CCL**
    - **Journaling**

Note: Program Administrators do not have access to individual assessment data.

➢ Section 2: How do Program Administrators Access and Use IAS?

You will receive an invitation letter via e-mail with your password. After you have received this letter you will be able to access the Internet Assessment System using your Internet browser. Make a note of your password and keep it for future reference. You will need your password each time you access IAS.

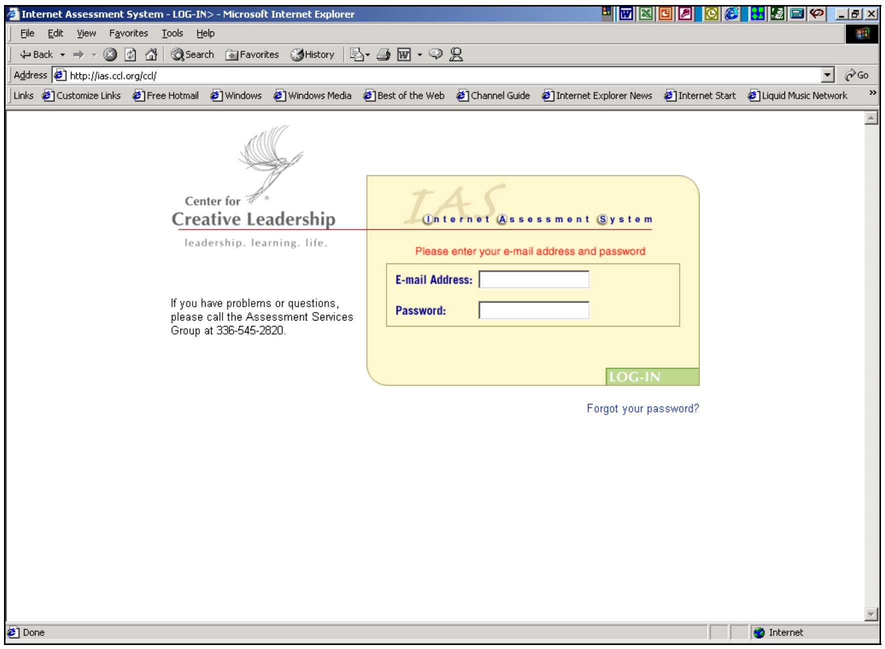


Figure 1 - IAS Home Page

1. **Click** on the icon on your Desktop or Start Menu to activate your **Internet browser.** Your browser is the application that gives you the ability to access the Internet. For optimum efficiency use Internet Explorer 4.0 or Netscape 4.0 or higher as your Internet browser.

2. **Type** the following URL in the address field of your Internet Home Page: http://ias.ccl.org

3. **Type your e-mail address** in the E-mail address field. Your e-mail address is your account identification.

4. **Type your password** in the Password field. You received your password in your invitation e-mail.

5. **Click LOG-IN.**

6. **Choose** the **Program Administrator** role.

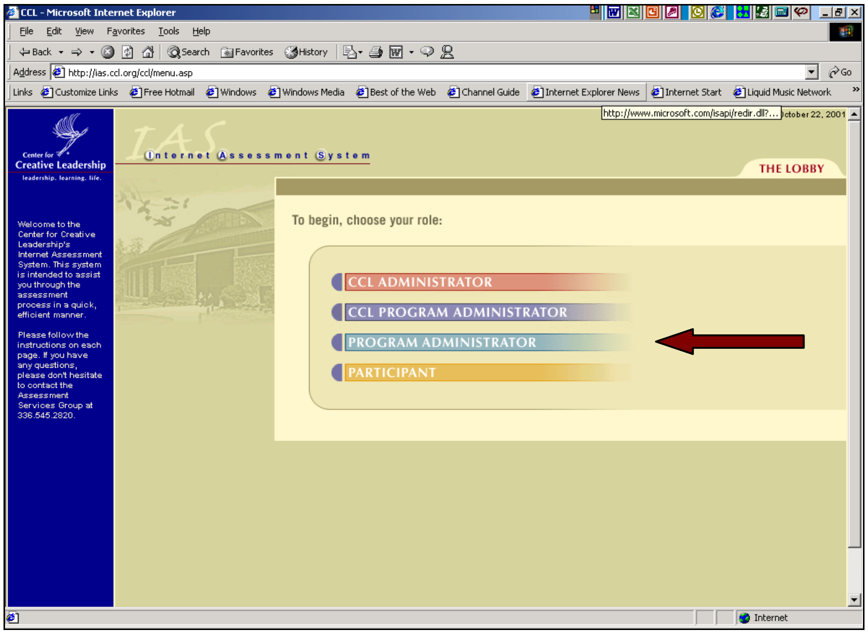


Figure 2 - IAS Lobby

Note: You may have more than one role in IAS. The above screen shows various access levels. In this manual we will discuss the role of Program Administrator.

➢ Section 3: Program Administrator Functions

If you chose Program Administrator, a menu of administrator functions appears. There are two functions available to Program Administrators: Track Activity/Group Status and Journal.

Click on the function you want to use.

We will begin with Track Activity/Group Status.

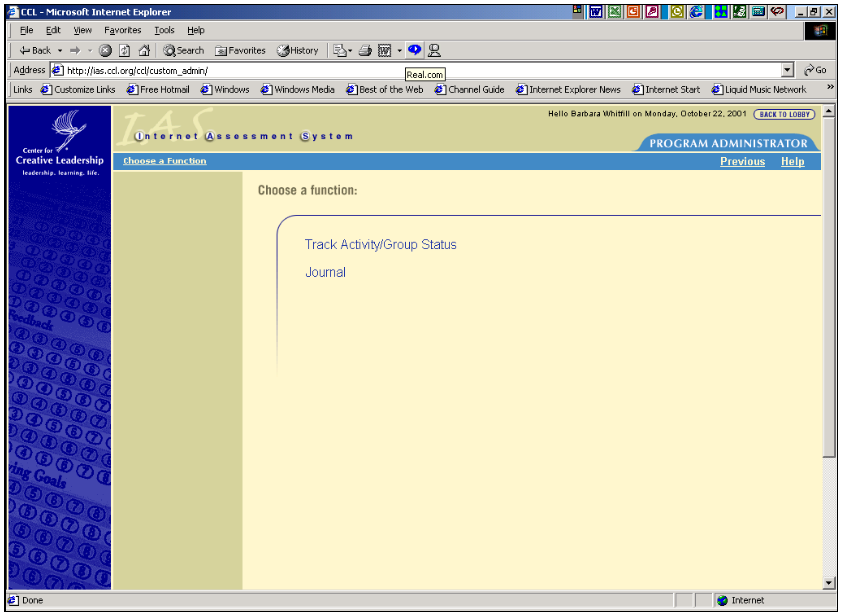


Figure 3 - IAS Program Administrator Function Menu

Section 3.1: Track Activity/Group Status

Tracking Activity/Group status gives you the ability to:

- View the list of activities/programs in progress.
- View status of returned assessments in each activity/program.
- View archive of activities/programs that have occurred in the last 12 months.
- *Note: Activities/Groups move to archive 7 days after **Program Start Date**. Administrators can view activity/group information for one year from the time the activity is archived.*
- Communicate with participants and CCL via e-mail.

Click the **Track Activity/Group Status** option from the menu.

A blue letter links to a list of activities beginning with that letter. For example, Leadership Development Program would be found by looking under “L”. A black letter indicates that no activities begin with that letter.

Section 3.1.1: To View Status of an Activity and its Participants.

1. **Click** on the **first letter** of the title of the activity/program you want to view.

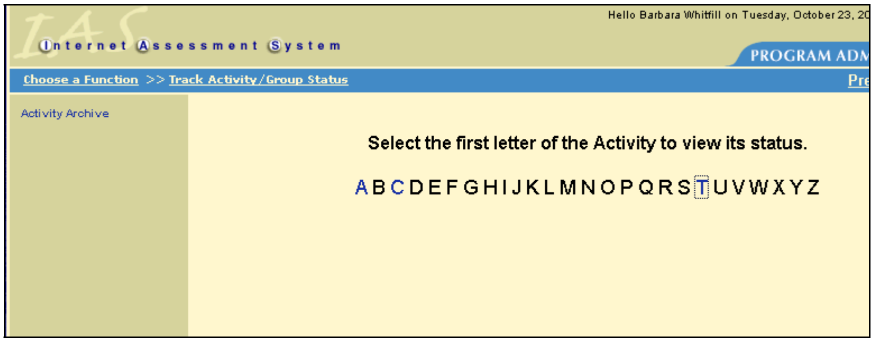


Figure 4 - Activity Search Screen

A list of your company's activities beginning with the letter you selected appears.

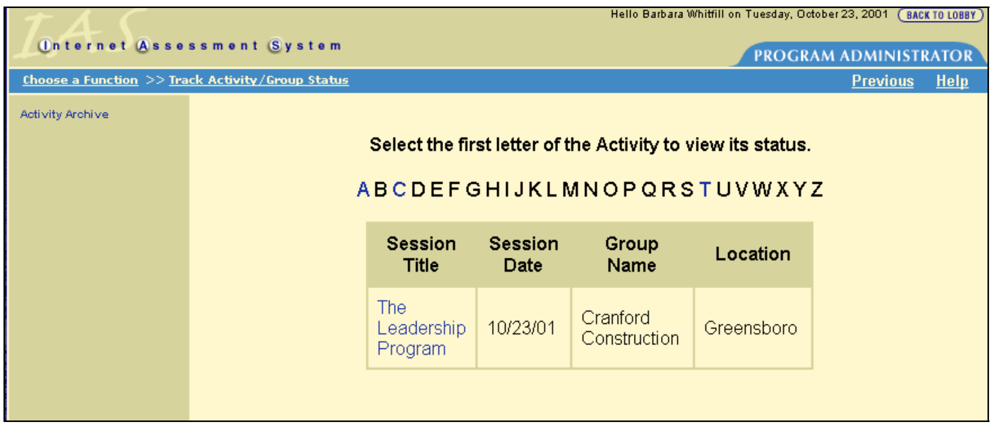


Figure 5 - Detail of Activity Search Screen

2. **Click** the **Session Title** you want to view.

   The Status Page for the selected activity appears. This screen shows the automatic notification schedule. On these dates the participants with valid e-mail addresses will receive an e-mail to remind them of the assessment(s)' status.

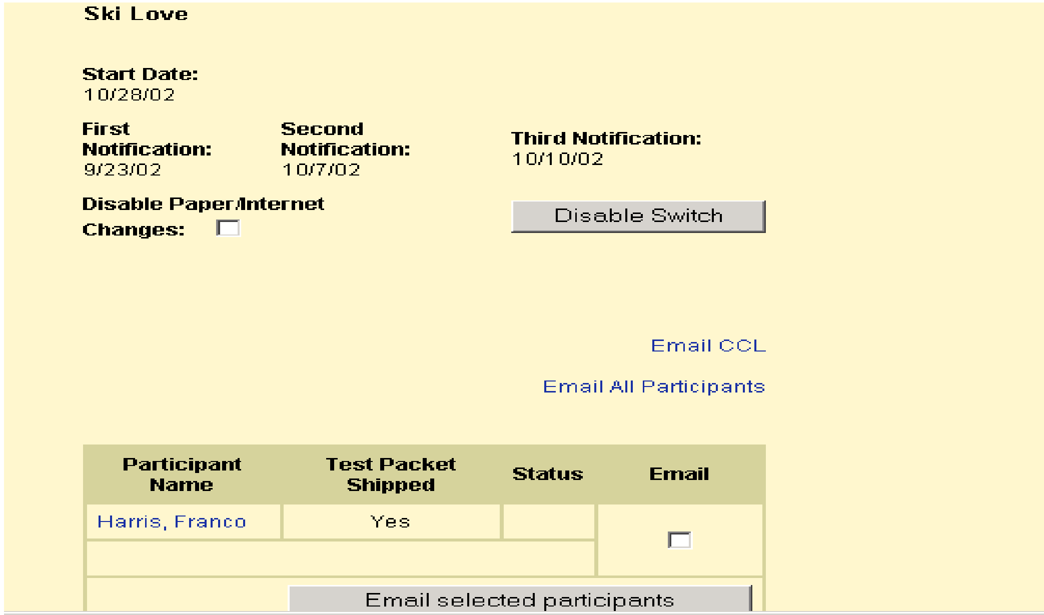


Figure 6 - Activity Status Screen

Note: On the Activity Status page, if you mark the Disable Paper/Internet Changes checkbox, it will prohibit participants from switching between on-line and paper documents for their assessment forms.

3. **Scroll** down the page to see the list of participants registered for this program.

The Participant table will show the Participant Name, Test Packet Shipped, Status and provide the ability to e-mail selected participants.

If the **Test Packet Shipped** cell displays, “**Yes,**” the Participant’s assessments have been released and are available for completion.

The **Status** cell will display the current status of the assessments. Members of the Client and Assessment Services Group at CCL enter these statuses. Status types are:

- **See Journal** –Indicates there is a note in the Journal regarding the participant’s assessments.
- **Scorable –** Indicates the minimum scoring requirements for each assessment have been met.
- **Complete –** Indicates enough valid forms have been returned for feedback in every category of each assessment.

4. **Click** on a **participant’s name** to view the status of the individual assessments. The **Participant Detail** screen displays.

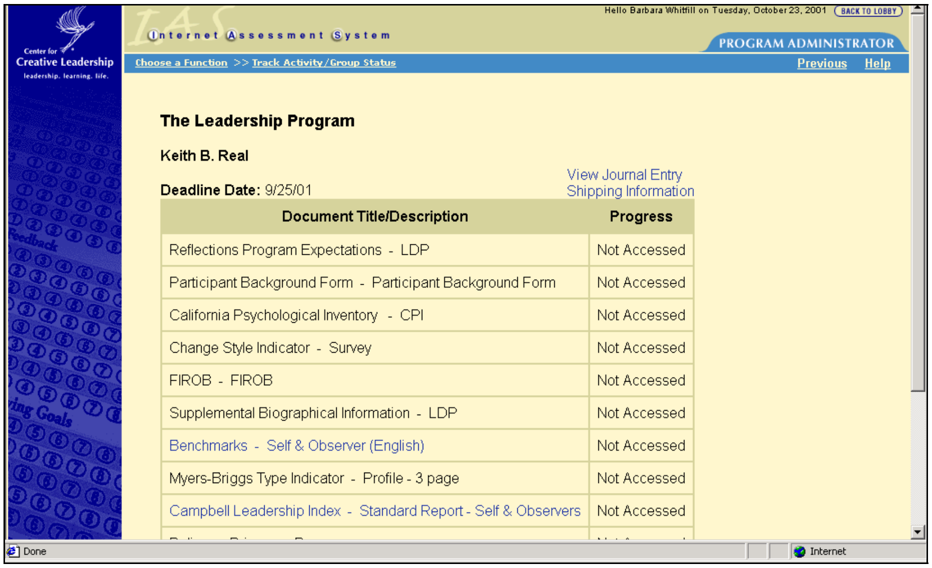


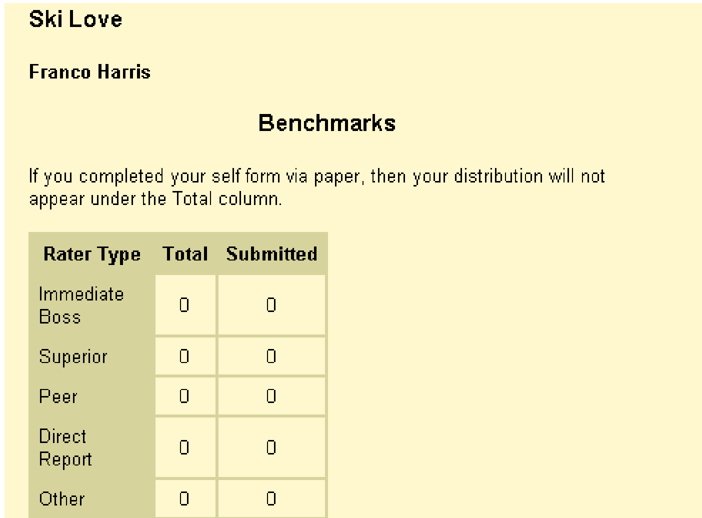
Figure 7 – Participant Detail Screen

The **Progress** cell will display the progress a participant has made on each document in their packet.

- **Not Accessed** –Indicates the participant has not accessed this document.
- **In Process** – Indicates the participant has accessed the document but has not yet submitted it back to CCL.
- **Submitted** – Indicates a participant has completed the survey and submitted it to CCL.
- **Complete** – Indicates that the submitted assessment has been successfully received in the database.
- **Canceled** – Indicates the form is no longer applicable for the participant to complete. (This will rarely be seen)

5. **Click** a **document name** that is highlighted in blue to view details for returned rater totals.

   The Rater page appears.



Ski Love

Franco Harris

Benchmarks

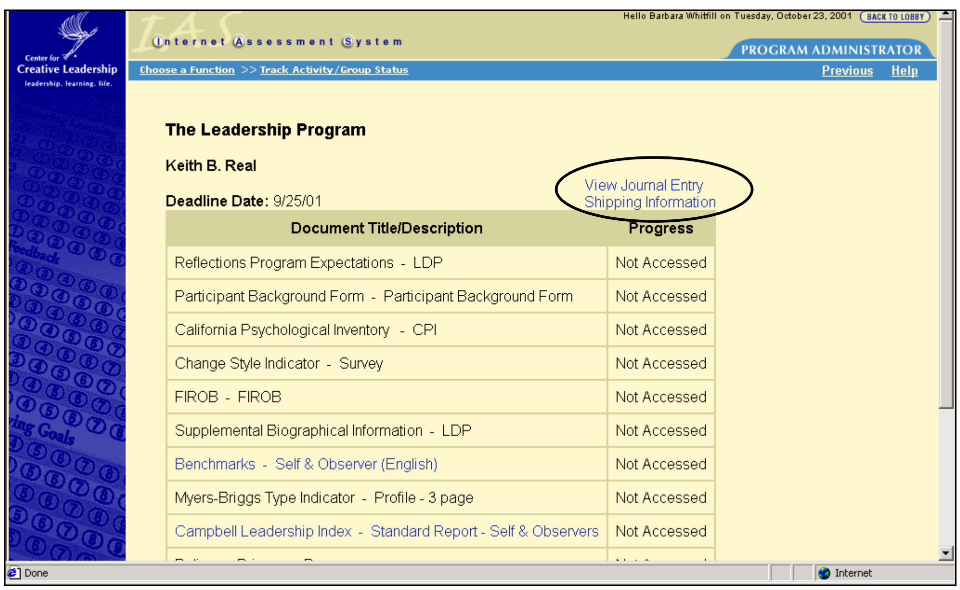
If you completed your self form via paper, then your distribution will not appear under the Total column.

Rater Type	Total	Submitted
Immediate Boss	0	0
Superior	0	0
Peer	0	0
Direct Report	0	0
Other	0	0

Figure 8 - Rater Table

The table shows the total number of raters the participant has assigned in each category and the number of valid rater forms submitted to the Client and Assessment Services Group at CCL.

6. **Click** the **Previous** link on the blue **Taskbar** to return to the previous screen.



Hello Barbara Whitfill on Tuesday, October 23, 2001 BACK TO LOBBY

Center for Creative Leadership leadership. learning. life.

Internet Assessment System

PROGRAM ADMINISTRATOR

Choose a Function >> Track Activity/Group Status

Previous Help

The Leadership Program

Keith B. Real

Deadline Date: 9/25/01

View Journal Entry
Shipping Information

Document Title/Description	Progress
Reflections Program Expectations - LDP	Not Accessed
Participant Background Form - Participant Background Form	Not Accessed
California Psychological Inventory - CPI	Not Accessed
Change Style Indicator - Survey	Not Accessed
FIROB - FIROB	Not Accessed
Supplemental Biographical Information - LDP	Not Accessed
Benchmarks - Self & Observer (English)	Not Accessed
Myers-Briggs Type Indicator - Profile - 3 page	Not Accessed
Campbell Leadership Index - Standard Report - Self & Observers	Not Accessed

Done

Internet

Figure 9 – Participant Detail Screen

There are two (2) blue links in the upper right corner of the **Participant Detail** screen that says **View Journal Entry** and **Shipping Information**.

7. **Click View Journal Entry** to see any notes entered for this participant. The Journal entries for the participant appear.

Note: Comments entered here should be specific to the assessment process and should not include general comments about the program or participant.

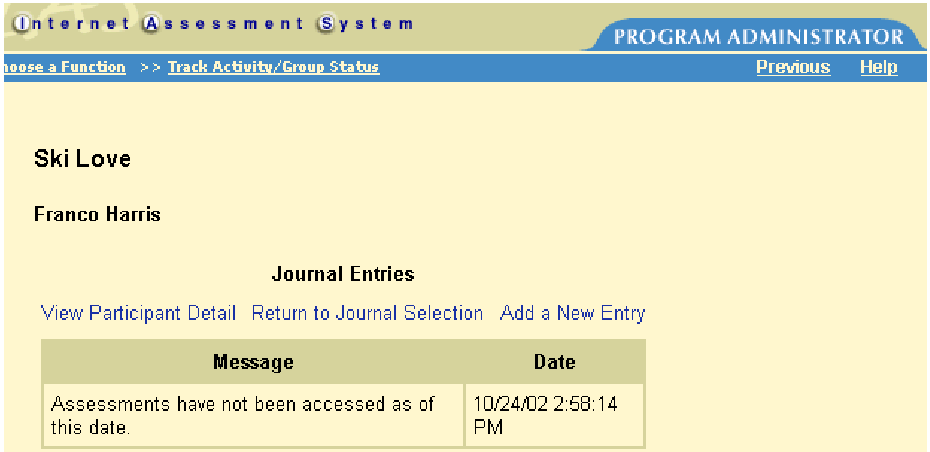


Figure 10 - Journal Screen

Note: The Journal Entry screen will display options to View Participant Detail, Return to Journal Selection, and Add a New Entry. The View Participant Detail command takes you back to the Participant Detail screen. The Return to Journal Selection takes you to the Journal Search screen. New Entries will be discussed in Section 3.2.

8. **Click View Participant Detail** to return to the **Participant Detail** screen.

9. **Click Shipping Information** to view shipping status.

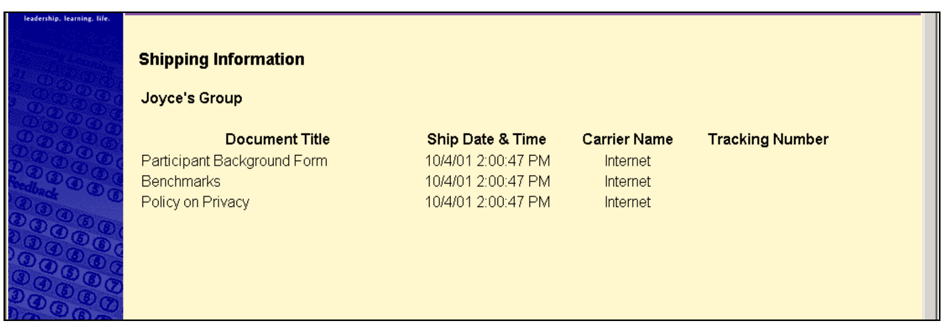


Figure 11 - Shipping Information Screen

10. Click the **Previous** on the blue **Taskbar** until you return to the Activity Status Screen.

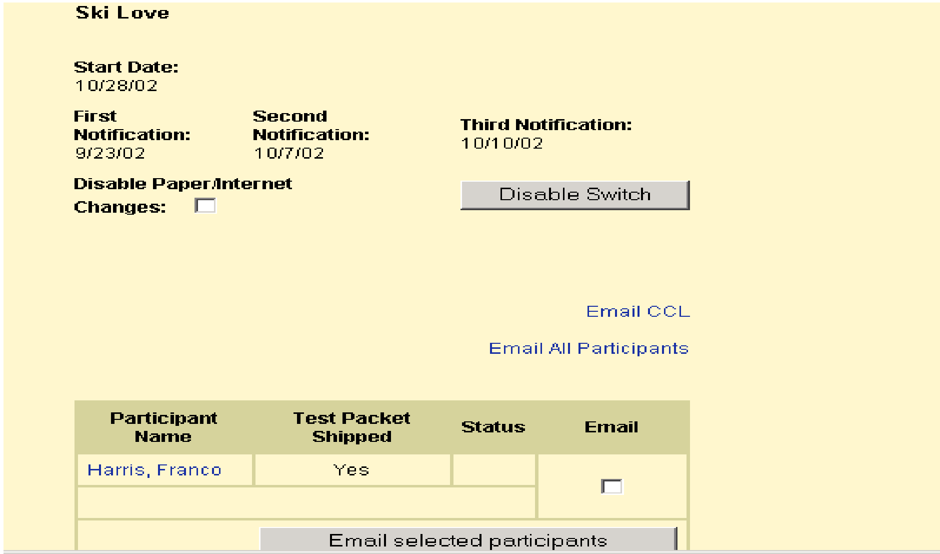


Figure 12 - Activity Status Screen

Section 3.1.2: To E-mail Participants:

1. **Scroll** down to the participant list.

2. **Mark** the **checkbox** next to each participant you want to e-mail.

3. **Click E-mail selected participants** to send a custom message to those participants.

   Note: This is a good way to announce changes or send warning messages to participants who have outstanding assessments.

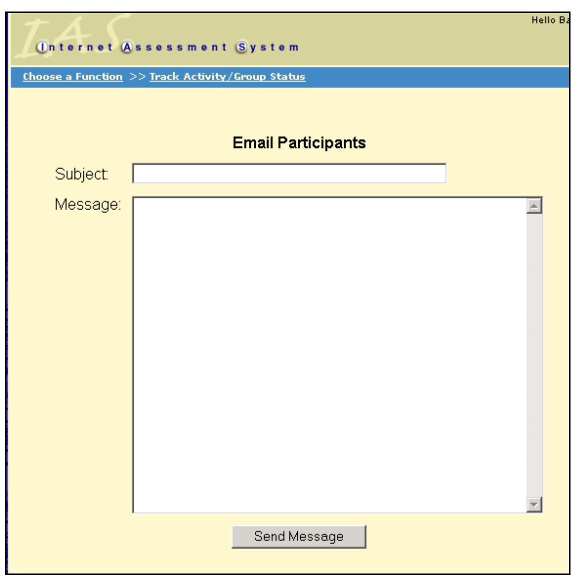


Figure 13 - Compose E-mail Screen

You can also **E-mail CCL** or **E-mail All Participants**.

1. **Click E-mail all Participants** to send an e-mail message to all the participants in the program.

2. **Click on the E-mail CCL** button to send an e-mail directly to the Client and Assessment Services Group at CCL. CCL will respond within one business day.

When you have finished viewing the status of a group:

3. **Scroll** to the top of the page and click **Track Activity/Group Status** on the menu bar to view another group's status or **Click Choose a Function** to return to the main menu.

Section 3.1.3: To Access an Archived Activity:

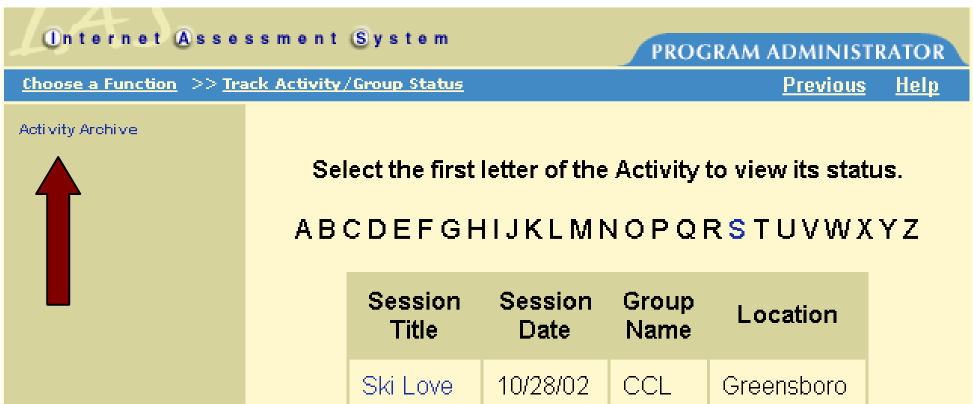


Figure 14 - Track Activity/Group Status

1. **Click Track Activity/Group Status** on the menu bar.

2. **Click Activity Archive** in the column to the left of the alphabet.

3. **Click** the first letter of the name of the archived event you want to review. The page showing the event's details appears.

   Note: This section is identical to the section that allows you to view status of current activities.

4. **Click** the **Previous** link on the blue **Taskbar** to return to the previous screen.

5. **Click Events Current** in the column to the left of the alphabet to select a current event or **Click Choose a Function** on the blue **Taskbar** to return to the main menu.

Section 3.2: Journaling

Journaling is a way to share information with CCL and other Program Administrators in your organization.

- Journals record notes or comments entered by both Program Administrators and CCL Administrators.
- Participants cannot access Journals.
- All entries are automatically time and date stamped.
- Once submitted, entries cannot be edited.

You can locate Journal entries by searching for a group or by participant name.

Section 3.2.1: To Open and View a Journal Entry:

1. **Click** on the **Journal** menu item on the Administrator Function page.

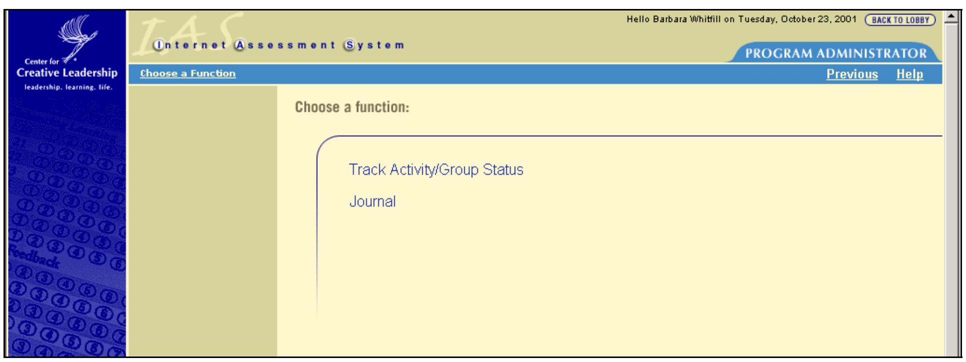


Figure 15 - Program Administrator Function Screen

2. **Click the first letter** of the **event (activity/group)**.

   Note: You can also search by the first letter of the Participant's last name.

3. **Click** an **event** to open it. The list of participants for the selected group appears.
4. **Click a participant's name** to open the Journal. The Journal entries for the participant appear.
5. **Click View Participant Detail** to see the status of the participant's documents as discussed in Section 3.1.1.

Section 3.2.2: To Create a Journal Entry:

1. **Select** the **first letter of the Event or Participant** from the Journal Page.

2. **Click** on the **Session Title or Participant Name.**

3. **Click Add New Entry**.

Figure 16 – Add Journal Entry screen

4. **Type** new Journal entry.

   Note: At the end of your comment, please note your name in parentheses. Journal messages are time and date stamped but do not reflect the name of the person making the entry (as shown in figure 17).

5. **Click Add Entry.**

Figure 17 – Completed Journal Entries screen

The new Journal Entry will display on the Journal Entries page.

➢ Appendix A: Quick Reference Guide

How Do Program Administrators Access and Use IAS?

1. **Click** on the icon on your Desktop or Start Menu to activate your **Internet browser.** Your browser is the application that gives you the ability to access the Internet. For optimum efficiency use Internet Explorer 4.0 or Netscape 4.0 or higher as your Internet browser.

2. **Type** the following URL in the address field of your Internet Home Page: http://ias.ccl.org

3. **Type your e-mail address** in the E-mail address field. Your e-mail address is your account identification.

4. **Type your password** in the Password field. You received your password in your invitation e-mail.

5. **Click LOG-IN.**

6. **Choose** the **Program Administrator** role.

Track Activity/Group Status

To View Status of an Activity and its Participants:

1. **Click** on the **first letter** of the title of the activity/program you want to view.

2. **Click** the **Session Title** you want to view.

3. **Scroll** down the page to see the list of participants registered for this program.

The Participant table will show the Participant Name, Test Packet Shipped, Status and provides the option to e-mail selected participants.

If the Test Packet Shipped cell displays, "**Yes**", the Participant's assessments have been released and are available for completion.

The "Status" cell will show the current status of the assessments. Status types are:

- **See Journal** –Indicates there is a note in the Journal regarding the participant's assessments.
- **Scorable** – Indicates the minimum scoring requirements for each

assessment have been met.

- **Complete –** Indicates enough valid forms have been returned for feedback in every category of each assessment.

4. **Click** on a **participant's name** to view the status of the individual assessments. The Participant Detail screen appears.

5. **Click** a **document name** that is highlighted in blue to view details for returned rater totals.

6. **Click** the **Previous** link on the blue **Taskbar** to return to the previous screen.

7. **Click View Journal Entry** to see any notes entered for this participant. The Journal entries for the participant appear.

8. **Click View Participant Detail** to return to the Participant Detail screen.

9. **Click Shipping Information** to view shipping status.

10. **Click** the **Previous** link on the blue **Taskbar** to return to the Activity Status Screen.

To E-mail Participants:

1. **Mark** the **checkbox** next to each participant you want to e-mail.

2. **Click E-mail selected participants. Type** a subject then compose the message.

To E-mail All Participants or E-mail CCL:

1. **Click E-mail All Participants** to send a message to all participants in the program.

2. **Click E-mail CCL** to ask questions or to request information. A CCL representative will respond within one business day.

3. **Click Send Message** when you have finished composing the message. IAS automatically sends the e-mail to the list.

4. IAS will then return you to the Activity Status Page.

5. **Scroll** up to the top of the page and click **Track Activity/Group Status** on the menu bar to return to the Search screen to choose another activity.

Or

6. **Click Choose a Function** to return to the main menu.

To Access an Archived Activity:

1. **Click Track Activity/Group Status** on the menu bar.

2. **Click Activity Archive** in the column to the **left** of the alphabet.

3. **Click** the first letter of the name of the archived event you want to review. The page showing the event's details appears.

4. **Click** the **Previous** link on the blue **Taskbar** to return to the previous screen.

5. **Click Events Current** in the column to the left of the alphabet to select a current event or **Click Choose a Function** to return to the main menu.

Journaling

To Open and View a Journal Entry:

1. **Click** on the **Journal** menu item on the Administrator Function page.

2. **Click the first letter** of the Activity (Event) name. These letters will be highlighted in blue. All current activities that begin with the letter you selected are listed.

3. **Click** an **Activity** to open it. The list of Participants for the selected group appears.

4. **Click a participant's name** to open the Journal. The Journal entries for the participant appear.

5. **Click View Participant Detail** to see the status of the participant's documents.

To Create a Journal Entry:

1. **Select** the **first letter of the Event or Participant** from the Journal Page

2. **Click** on the **Session Title** or **Participant Name.**

3. **Click Add New Entry**.

4. **Type** new Journal entry.

5. **Click Add Entry.**