



Certified Consultant Instructions for Global Team Assessment Use

The following instructions will guide you through the process for requesting GTA access for teams you are working with and accessing the GTA report.

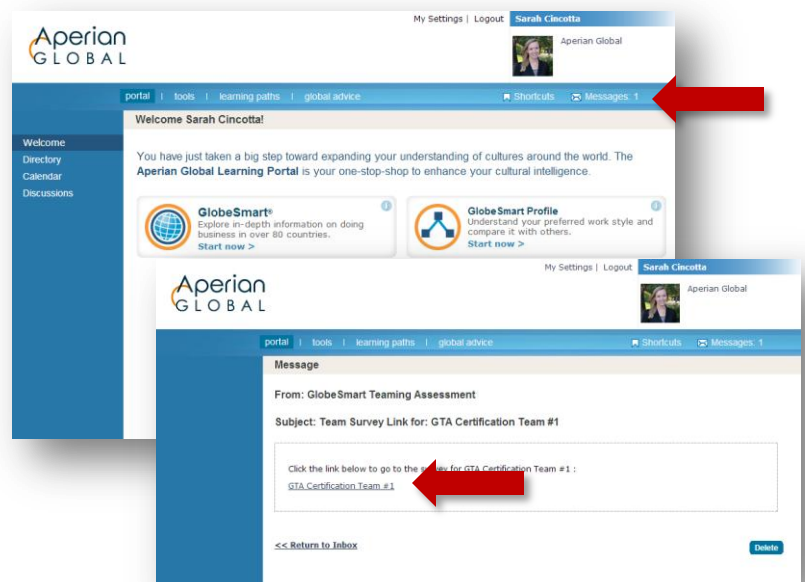
Requesting GTA Access

- 1 **Send an email to assessmentrequest@aperianglobal.com with request for an assessment for TEAM NAME, along with the following two documents provided separately:**
 - GTA Survey - User Upload Template (Excel Spreadsheet)
 - GTA Email Invitations – Customization Document (Word Document)
- 2 **Aperian Global will initiate the team survey using the information provided.**
NOTE: Automatic invitations and reminder emails will be sent to the team from the email address webtools@aperianglobal.com. We recommend that your team leaders send an introductory email to team members prior to the GTA survey being initiated.
- 3 **Aperian Global will send you a confirmation when the team assessment is initiated, and will invoice you for the number of team assessments requested.**

Preparing for your GTA Debrief Session

You will need to log into the Aperian Global Learning Portal (AGLP) to access the team results.

- Once you are logged in, click on the “Messages” button in the top right corner of your screen.
- Click on the subject, “Team Survey Link for: [Team Name].” The email message shown will include a link to your team’s survey.
- Click on that message, and you will be brought to the Team Information Page.
- The Team Information will include the start and end date for the survey and the current completion status. If you would like to send an email reminder to team members, you may do so by clicking on the Email Reminder icon.



NOTE: an automatic reminder is sent half-way through the survey timeframe, and 24 hours prior to the close date of the survey. You may send as many survey reminders as you wish, but they will go to the entire team as it is not possible (for confidentiality reasons) to send only to those who have not yet taken the assessment.

When the assessment results are ready after the close date of the survey, click on the Results icon. This will bring you to a Survey Results page.

- By default, Team Leaders are allowed access to the team results at the conclusion of the survey. If you do not want the Team Leader to have access to the results yet, you may uncheck the box on the top left: "Make report available for Team Leader".
- If you want the team members to have online access to the team's results, check the box in the middle: "Make report available for Team Members".
- Both of these steps would require the team Leader and Members to log back into the AGLP website to access their results online.

Team Name	Facilitator	Type	Completion	Start Date	End Date
A List Team	Lisa Kieffer	Sales	2/4	07 Aug 2013	17 Aug 2013

Make report available for Team Leader

Make report available for team Members

Hide all open-ended responses

Run Report for Demographics

Send Report To

Preview Report

Facilitators can share the team survey report in two ways:

- Email the survey directly to recipients by entering in email addresses into the "Email Report to" field. This will load all open-ended responses as is into the report, unless you first click on the top right "Hide all open-ended responses."
- Download the report as a PDF and send the file to recipients as an attachment. Click on "Preview Report". If you do not want to include the open-ended responses in the report, you may first click on the top right option to "Hide all open-ended responses."

When you click on Preview Report, you will see:

- Survey Items listed by Element** – The aggregate scores for each of the 42 items in the assessment.
- Element Priorities Graph** – The team rankings of priority for action by Element. *NOTE: Each team member chooses two priorities when taking the survey.*
- Preview of Open-Ended Responses** – here you have the ability *if needed*, to edit or hide certain responses. *NOTE: We strongly recommend not editing open-ended responses unless there is something about a response that makes the identity of the team member who wrote it evident. Clicking on "Edit" will allow you to modify any distinguishing text. Also, if any feedback to the Team Leader or other team members is not acceptable for public viewing, you can deselect that feedback so it is not shared and either take the issue offline with the Team Leader or address it verbally in the team debrief. To hide a comment, uncheck the box that says "Show in Report." You must then scroll to the bottom of the open-ended responses to click on "Save Changes" (if you're still editing) or "Save and Download Report" (if you are ready to download your report).*

If you would like to download an unformatted PPT version of the results, go back to your Facilitator dashboard and click the button under "Add to PPT." Then scroll to the bottom of the page and click on "Download PPT Report for the Selected Teams."

Additional Assistance?

If you need to make changes to the team, such as add or delete a team member or change a team member's email address, please re-contact assessmentrequest@aperianglobal.com, or the Aperia administrator who confirmed your team set up.

If a Team Member or Leader has a technical issue with accessing the survey, please have him or her contact Technical Support at webtools@aperianglobal.com.