

# Welcome to the Synchronous Assessment Tool

Here's a quick start guide to help you  
navigate through the survey tool.

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## Logging In

1. Whether we create a new account for you or if you previously had a user account on in2vate, we will provide a link for you to log in.
2. If you are logging in for the first time or do not know your password, we encourage you to change your password by clicking on “update my account” in the upper righthand corner of the web page.
3. You may log into the assessment tool at: [www.in2vate.com/synchronous](http://www.in2vate.com/synchronous).



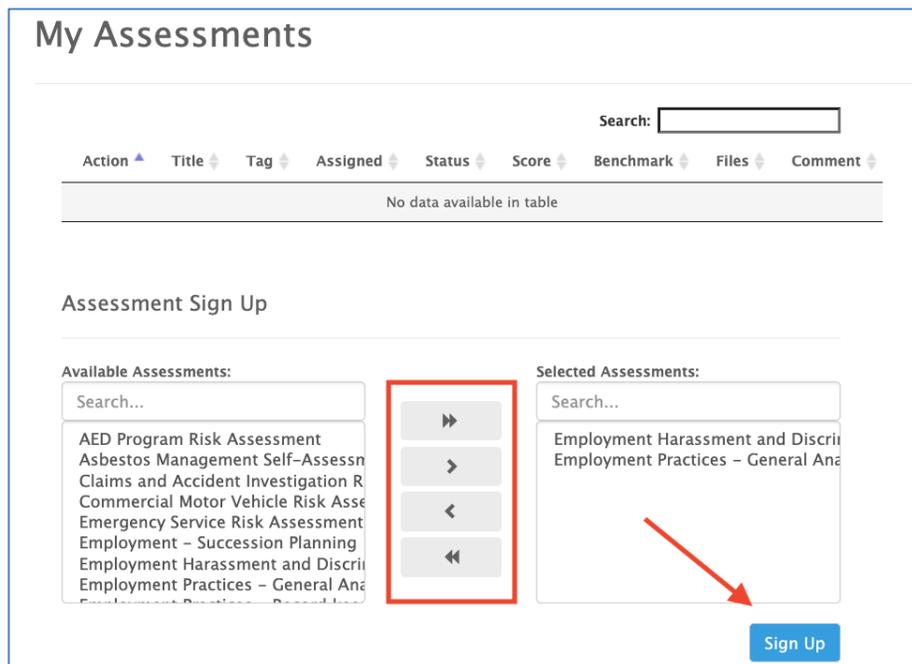
## Self-Assign an Assessment

Once logged into the assessment tool, you will need to assign one or more assessments to yourself. To do this:

1. Click on “My Assignments” in the left navigation menu on the “Assessments” tab.



2. Locate the “Assessment Sign Up” tool below the current assignment list. Click on the assessment you wish to assign in “Available Assessments” and use the arrows in the center of the two boxes to move the selection to “Selected Assessments.” Use the double arrow to select all assessments. Once you have selected your assessments, click “sign up” to complete the assignment.



3. You will receive a confirmation message that sign up was successful. Click "OK" and the selected assessment will be shown in your assignment list. You will also receive an email notification.

### My Assessments

Search:

Action ▲	Title	Tag ⇅	Assigned ⇅	Status ⇅	Score ⇅	Benchmark ⇅
<a href="#">Take Assessment</a>	Employment Harassment and Discrimination (Part 2) (31)		07/06/2020	Pending	0%	0 %
<a href="#">Take Assessment</a>	Employment Practices – General Analysis (Part 1) (29)		07/06/2020	Pending	0%	0 %

## Completing the Assessment

1. Click on “My Assignments” in the left navigation menu
2. Click “Take Assessment” from the assignment dashboard.

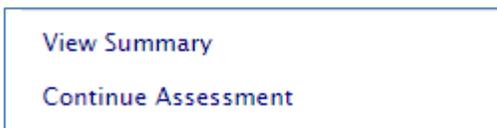


**My Assessments**

Search:

Action	Title	Tag	Assigned	Status	Score	Benchmark
<a href="#">Take Assessment</a>	Employment Harassment and Discrimination (Part 2) (31)		07/06/2020	Pending	0%	0 %
<a href="#">Take Assessment</a>	Employment Practices – General Analysis (Part 1) (29)		07/06/2020	Pending	0%	0 %

3. You do not have to complete an assessment in one sitting. Simply click “Save Draft” to come back to it later. You will see a link labeled “Continue Assessment” when you have saved a “draft” and your draft is saved to the database:

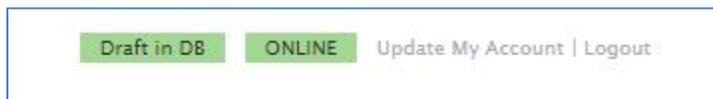


You will also see indicators at the top right of the browser window:

- a. when you begin a survey



- b. when you save a draft



### NOTES:

- 1) You can work with more than one draft at a time. However, you must ensure you close out of one assessment before opening another to avoid the possibility of cached data crossing over assessments.
- 2) Take note of ONLINE/OFFLINE status displayed in upper right-hand corner of the webpage when saving to draft or submitting your completed assessment. Assessment results will not save to the database until you are ONLINE. Make certain that you see the confirmation message that your draft or assessment has been saved to the database before you exit and close your browser.

If you receive a warning that your assessment cannot be saved until you are online, BE PATIENT and wait for the message that it has been saved to the database and you see the ONLINE indicator.

If you do not see the indicators above at all, please contact in2vate for assistance.

4. Once you have completed an assessment, you can view a summary of the results at any time by clicking the View Summary link in your assessment list. Your percentage score and benchmark are also shown. Please note that a benchmark is only available once there are five completions of the identical assessment. Currently, this benchmark is limited to your pool.

My Assessments						
Search: <input type="text"/>						
Action	Title	Tag	Assigned	Status	Score	Benchmark
<a href="#">Take Assessment</a>	Employment Harassment and Discrimination (Part 2) (31)		07/06/2020	Pending	0%	0%
<a href="#">View Summary</a>	Employment Practices – General Analysis (Part 1) (29)		07/06/2020	Complete	50%	0%

5. Working with photos:
  - a. Queue your photos first by selecting them or dragging them into the box. You can remove them from the *queue* before uploading by clicking the minus sign in the upper right corner of the photo. (Step 1)
  - b. Once you have your photos queued, click “Start Upload” to upload them. You will then see them listed to the right. (Step 2)
  - c. To remove an *uploaded* attachment, uncheck the box to the left of the filename. When you save or submit, they will not be uploaded.
  - d. When saving to draft, your photos are stored in the database. When continuing a draft, additional photos may be uploaded, but not removed from a question.
  - e. While the database supports large files, please try to keep your photo files to a maximum of 1MB.

Add File(s):

Files to attach to this assessment:

**Warning:** Please remove special characters from file names prior to upload (i.e., commas, apostrophes, slashes, quotes) and ensure that all files have a valid extension (i.e., .doc, .pdf, .xls).

**Files listed here after uploaded. To remove, uncheck the box(es). When you save or submit they will not be uploaded.**

Select files

Add files to the upload queue and click the start button.



**Step 1** ↓      **Step 2** ↓

96% 264 kb

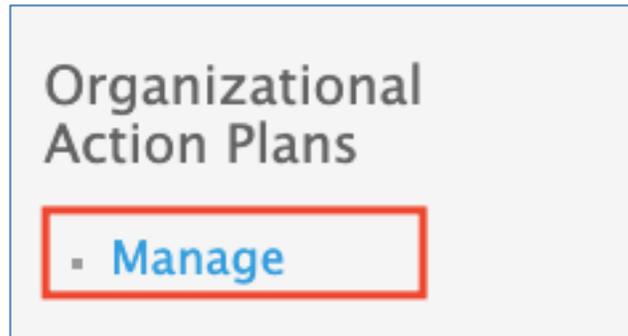
75858\_1514520751195\_4058816\_n.jpg

75377\_1514521391211\_3943886\_n.jpg

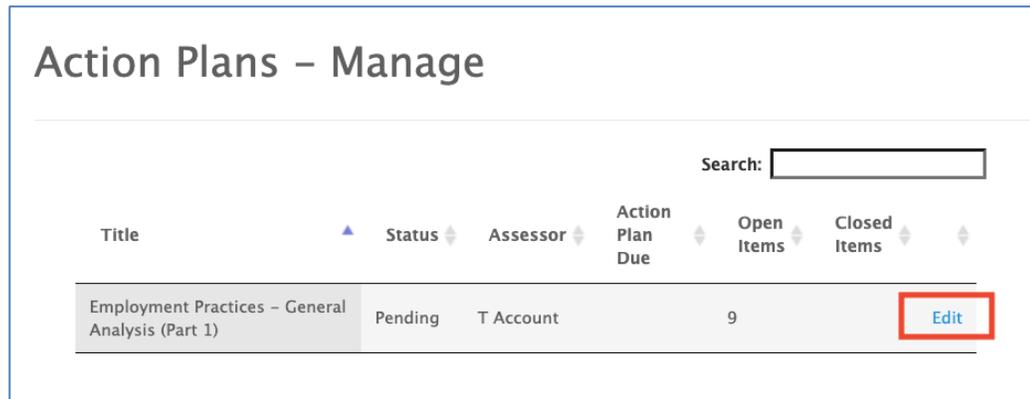
## Organizational Action Plans

One of the unique features of the in2vate Assessment Tool is its ability to automatically generate Action Plans based on your answers to assessment questions. For each unsatisfactory answer, an action item is created to assist you in tracking and addressing any deficiencies identified.

1. To access your organizational action plans, click on “Manage” in the left navigation:



2. For each completed assessment, you will see a new action plan listed with the number of action items associated with it. Click on “edit” to see the list of items.

A screenshot of the "Action Plans - Manage" page. It features a search bar at the top right and a table below. The table has columns for Title, Status, Assessor, Action Plan Due, Open Items, and Closed Items. One row is visible with the title "Employment Practices - General Analysis (Part 1)", status "Pending", assessor "T Account", and 9 open items. An "Edit" button is highlighted with a red border in the rightmost column of this row.

Title	Status	Assessor	Action Plan Due	Open Items	Closed Items	
Employment Practices - General Analysis (Part 1)	Pending	T Account		9		<a href="#">Edit</a>

- The best practice associated with each item will be listed by default with the related question number. You can toggle between actions and comments by clicking the buttons shown.

**Action Items – Employment Practices – General Analysis (Part 1)**

Show  entries
 Search

Feedback	Owner	Due Date	Status	Priority	Completion Date	
Q 2 – The Best Practice: You have clear, up-to-date job descriptions for every position that identifies essential functions of the job, required degrees or licenses and any desired or preferred experience, education, certification, etc.			Pending			<a href="#">Edit</a>
Q 4 – The Best Practice: You make recruit efforts to reach the potential external pool of candidates, especially any under-represented groups.			Pending			<a href="#">Edit</a>

- Clicking “edit” from the above screen opens a page showing the details associated with the action item, including the question, your answer, and any comments. Here, you are able to add documents, set a status, completion date, assign a responsible party (existing users) and add notes relative to the progress of addressing the item. A PDF can be generated for emailing or printing each item as well.

**Edit Action Item**

Assessment

Question 2

Answer

Action Item

Feedback

Comments

Resources

Notes	Date	By	Note	File
No notes added				
Owner	<input type="text"/>			
Status	<input type="text"/>			
Due Date (mm/dd/yyyy)	<input type="text" value="mm/dd/yyyy"/>			
Completion Date (mm/dd/yyyy)	<input type="text" value="mm/dd/yyyy"/>			
Add Notes	<input type="text" value="New note goes here"/>			
File input	<div><p><b>Select files</b></p><p>Add files to the upload queue and click the start button.</p><div style="border: 1px solid #ccc; padding: 10px; text-align: center; min-height: 100px;">Drag files here.</div><p><input type="button" value="Add Files"/> <input type="button" value="Start Upload"/> <span style="float: right;">0% 0 kb</span></p></div>			
<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Back to Action Items"/> <input type="button" value="Export to PDF"/>				

## Assessment Reports

The tool provides a number of Enterprise Risk Technology reports providing a snapshot for your organization. From the left navigation, you have access to both summary and detailed reports for assessments completed by your organization as well as action plans and items.

NOTE: Major updates are coming soon to this section of the assessment tool.

If you have any questions or need technical assistance, please contact  
in2vate Customer Service  
8 am - 5 pm CST:  
800.576.5262  
[helpdesk@in2vate.com](mailto:helpdesk@in2vate.com)