

**User Manual**  
**for**  
**SOLO IS ®**

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# INTRODUCTION

## Hardware Requirements

- Minimum Hardware requirements are a Desktop PC/ MAC with a minimum of 1 Mbps connection speed.

## Software Requirements

- Best Viewed in Latest Google Chrome Browser version: 80 and above.

## THE TUTORIAL

### Procedure

The Homepage of the Solo IS Survey System consists of three different login options.

- **Individual Login:** This option is for someone looking to purchase Solo IS for their personal use.
- **Group Admin Login:** This option can be used by individuals/clients, etc. who want to purchase multiple assessments for a group of users.
- **Invited:** This option is used when a Group Admin sends an invite to take part in an assessment. The activation link is sent to the users by the Group Admin.



Figure 1. Login Page

## Functionalities:

### 1. Sign Up

The Sign-Up page consists of details such as the user's First and Last Name, Email ID, Confirm Email ID and Password. It also has a Radio Button with two options: Individual or Group Admin.



Figure 2. Sign Up Page

### 2. Sign In/ Login:

Once the user successfully signs up for the system, an activation link is sent to the user's email. When that link is activated, it will take the user to the login page. The user will then click on the system (Individual or Group Admin) and the user can log in using Group Admin/Individual credentials. Only Group Admins and Individuals will get an Account verification email.

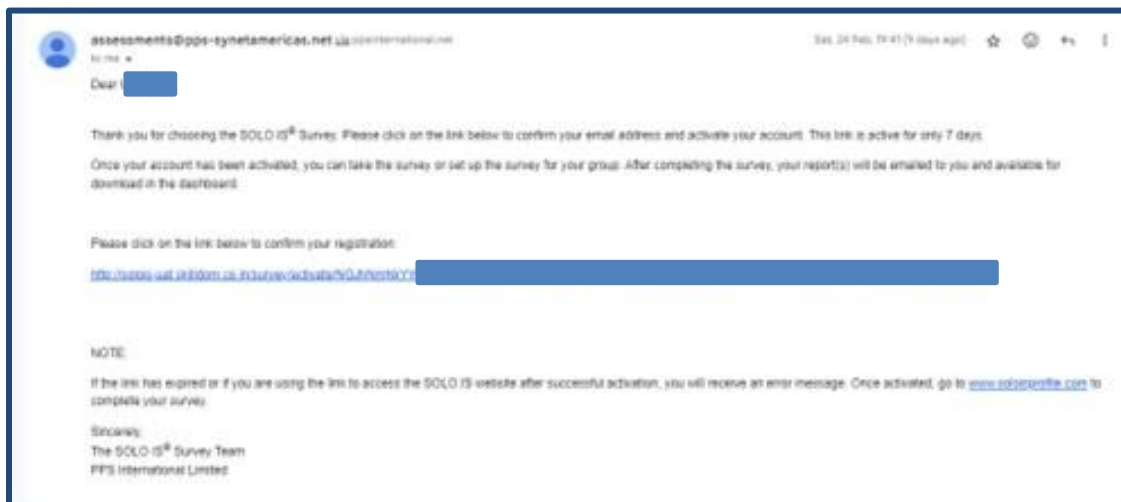


Figure 3. Activation Link Email



Figure 4. Group Admin Login Page

### 3. Email Verification/ Activation Link:

A user may need the activation link sent again because the activation link expires after 7 days or the user does not receive a Registration Email.

When the Admin/Individual comes across such a situation, click on the “Verify your email” button.



Figure 5. Verify your email location

The user is then redirected from the Homepage to the Email Verification page. The user must then type in their email. A new Activation Link is sent to that email address.

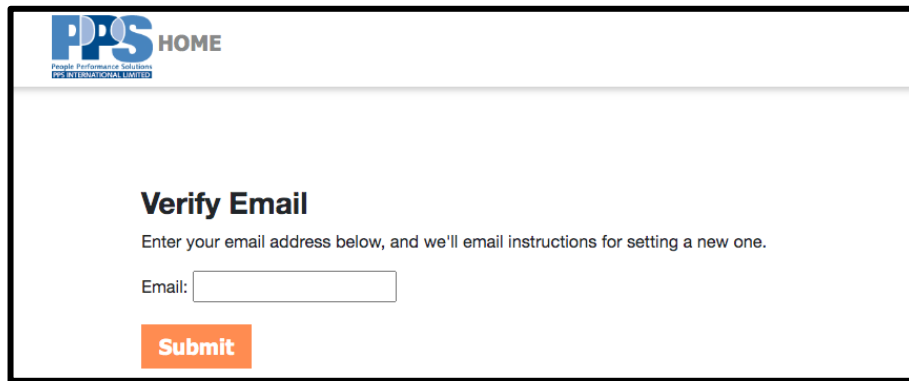


Figure 6. Verify Email page

#### 4. **Forgot Password:**

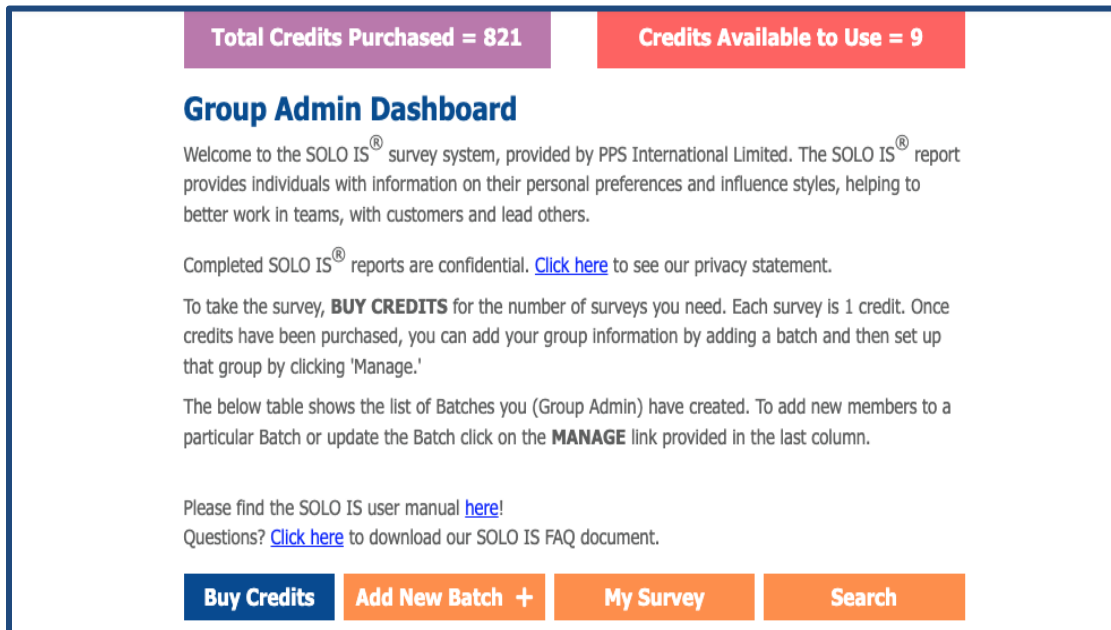
In case a user forgets their password and cannot log in, click on “Forgot Password.” Enter the email address and click “Submit.”



Figure 7. Forgot Password Link

## Group Admin Dashboard

Once the user logs in using their group admin credentials, they enter the dashboard.



The screenshot shows the Group Admin Dashboard with a purple header bar containing two status boxes: "Total Credits Purchased = 821" and "Credits Available to Use = 9". Below the header, the title "Group Admin Dashboard" is followed by a welcome message and instructions. At the bottom, there are four orange buttons: "Buy Credits", "Add New Batch +", "My Survey", and "Search".

**Total Credits Purchased = 821**      **Credits Available to Use = 9**

### Group Admin Dashboard

Welcome to the SOLO IS<sup>®</sup> survey system, provided by PPS International Limited. The SOLO IS<sup>®</sup> report provides individuals with information on their personal preferences and influence styles, helping to better work in teams, with customers and lead others.

Completed SOLO IS<sup>®</sup> reports are confidential. [Click here](#) to see our privacy statement.

To take the survey, **BUY CREDITS** for the number of surveys you need. Each survey is 1 credit. Once credits have been purchased, you can add your group information by adding a batch and then set up that group by clicking 'Manage.'

The below table shows the list of Batches you (Group Admin) have created. To add new members to a particular Batch or update the Batch click on the **MANAGE** link provided in the last column.

Please find the SOLO IS user manual [here](#)!

Questions? [Click here](#) to download our SOLO IS FAQ document.

**Buy Credits**   **Add New Batch +**   **My Survey**   **Search**

Figure 8. Group Admin Dashboard

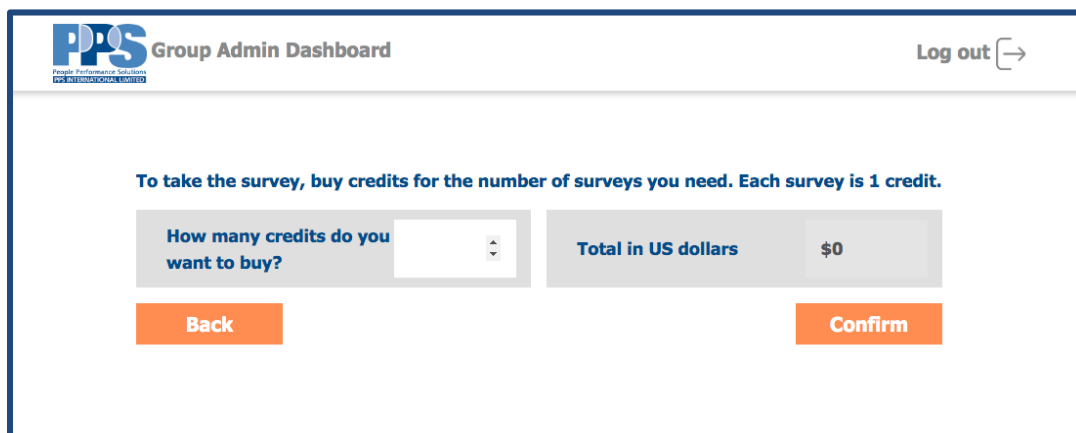
The Top Left Corner shows the Number of Credits that have been purchased by the Group Admin.

The 'Credits Available to Use' number decreases based on the assessments that have been assigned a credit. For example, if the 'Credits Available to Use' shown are 10 and 6 assessments have been assigned, then the total available credits will decrease to 4.

The Dashboard has four primary functions, listed below:

### 1. Buy Credits

Select the "Buy Credits" button on the dashboard to purchase credits for assessments. Each Survey requires 1 credit and 1 credit is \$30.



The screenshot shows the Buy Credits Page with the PPS logo and "Group Admin Dashboard" header. A "Log out" link is in the top right. The main content area has a heading "To take the survey, buy credits for the number of surveys you need. Each survey is 1 credit." Below this is a form with a dropdown menu for "How many credits do you want to buy?" and a text box for "Total in US dollars" showing "\$0". At the bottom are "Back" and "Confirm" buttons.

**PPS** Group Admin Dashboard      Log out →

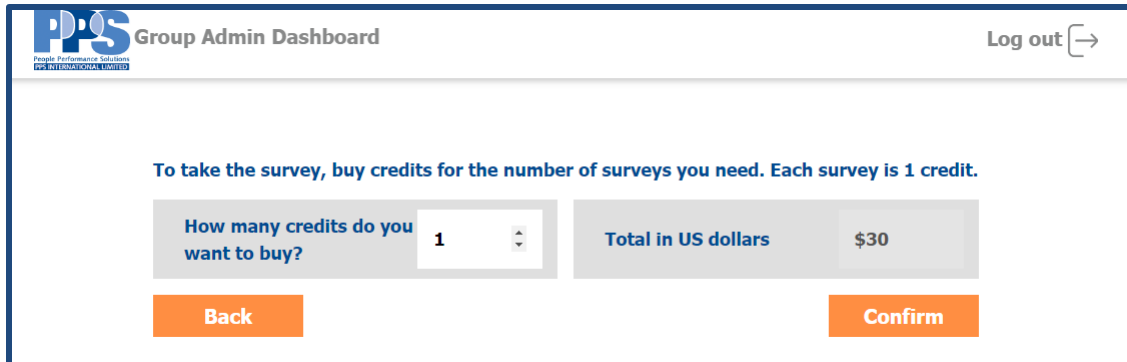
**To take the survey, buy credits for the number of surveys you need. Each survey is 1 credit.**

How many credits do you want to buy?       Total in US dollars      \$0

**Back**      **Confirm**

Figure 9. Buy Credits Page

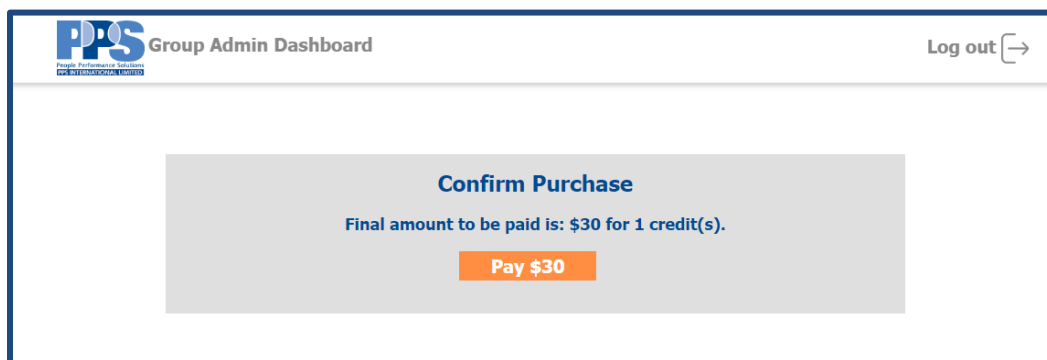
Enter the number of credits you want to buy and proceed forward by hitting the “Confirm” button.



The screenshot shows the 'PPS Group Admin Dashboard' header with a 'Log out' link. Below the header, a message states: 'To take the survey, buy credits for the number of surveys you need. Each survey is 1 credit.' The main content area contains two input fields: 'How many credits do you want to buy?' with a dropdown menu set to '1', and 'Total in US dollars' with a value of '\$30'. At the bottom of the form are two orange buttons: 'Back' and 'Confirm'.

Figure 10. Buy Credits page with credit added

A Purchase Confirmation page appears after hitting the “Confirm” button. Select the “Pay” button to begin the payment process.



The screenshot shows the 'PPS Group Admin Dashboard' header with a 'Log out' link. The main content area features a gray box with the title 'Confirm Purchase' and the text 'Final amount to be paid is: \$30 for 1 credit(s)'. Below this text is an orange button labeled 'Pay \$30'.

Figure 11. Credit Purchase confirmation page

Enter the Billing Details such as the Card Number, CVV, Billing Address, etc., and select the “Pay” button.  
**NOTE:** Special Characters such as # are not allowed, so if a billing address is #455, write No. 455 or Number 455.



PPS Group Admin Dashboard Log out →

### Confirm Purchase

Final amount to be paid is: \$30 for 1 credit(s).

**Pay \$30**

Card Number \*

Exp. Date \* Card Code

**Billing Address**

First Name \* Last Name \*

Billing Country \* USA Zip \*

Street Address \* City \*

State \* Phone Number

Email \*

**Pay** **Cancel**

Figure 12. Credit Payment page.

Once the payment is successful, the system generates a transaction ID and a Payment Confirmation notification. Select the “Dashboard” button to check if the credits bought are reflected on the Top Left corner of the screen.

If the credit card is charged and credits don’t appear in your account, notify [PPS International](#).

PPS Group Admin Dashboard Log out →

**Successfully created transaction with Transaction ID : 80021093029**

Response	Ok
Email	
Amount-paid	\$30.0
Response Code	1

**Dashboard**

Figure 13. Successful Transaction page

## 2. Add New Batch

The next function in the dashboard is adding batches. A Batch is a group of people who can participate in a particular survey. The Group Admin creates the Batch and adds users to it.

Fill in the desired Batch Name, Timezone, Survey Start Date and Time, and Survey End Date and Time. You can select the time zone you would like the survey to be sent by selecting from the dropdown menu. Then update the Survey Start Date and Time and Survey End Date and time base on that timezone.

**Add Batch**

**Batch Name**

**Timezone** UTC

**Survey Start Date Time** 2024-03-04 09:53:39

**Survey End Date Time** 2024-03-18 09:53:39

A reminder e-mail will be automatically sent 2 days prior to the End Date to all participant(s) who have not yet completed the survey.

If you want to send 7 day reminder, please click on checkbox below.

**Send 7 Day Reminder** ☐

When uploading your group, Click NO if you do not want your participant to receive their report upon completion. Click YES if you want your participant to receive their report upon completion.

**Participant(s) can download their individual reports** YES ☒

**Submit** **Back**

Figure 14. Add Batch Page

A reminder e-mail will be automatically sent 2 days prior to the End Date to all participant(s) who have not yet completed the survey. If you want to send an additional automatic reminder e-mail 7 days prior to the End Date then check on checkbox next to “Send 7 Day Reminder”

**Send 7 Day Reminder** ☐

Figure 15. 7-Day Reminder option

There is an option to Show/Hide Individual Reports above the “Submit” button. Leaving it on “-Yes” implies that the individuals taking the survey can receive/download their report upon completion of the survey. Selecting “-No” does not allow the survey participants in the batch to view and download their reports automatically upon survey completion.

*Note: The reports are available to the Group Admin for both options. The Group Admin can send the reports via email to the individual users manually from the Dashboard.*



Figure 16.1 Reports can be downloaded by individuals



Figure 16.2 Reports cannot be downloaded by individuals

Click on “Submit” to create the Batch. The system will redirect you to the Dashboard. You can see the batch you just created in the table at the bottom.

Batches are listed by the latest Start Date in the table on the Group Admin Dashboard.

Buy Credits		Add New Batch +		My Survey		Search	
Batch Name		Number in this batch	Start Date (UTC Time)	End Date (UTC Time)	Manage		
t1		8	Sept. 13, 2022, 12:45 p.m.	Sept. 24, 2022, 7:29 a.m.	Manage		<input type="checkbox"/> Delete

Figure 17. Batch Table Listing

3. My Survey

The next function in the dashboard is the “My Survey” button. The Group Admin can track their personal survey. Clicking on the “My Survey” button will redirect to the page with the details of their individual survey. If they have not taken the survey, nothing will be listed. If they set themselves up in a group, it will direct here, to their individual/self-survey.

Total Credits Purchased = 821

Credits Available to Use = 9

### Group Admin Dashboard

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Completed SOLO IS<sup>®</sup> reports are confidential. [Click here](#) to see our privacy statement.

To take the survey, **BUY CREDITS** for the number of surveys you need. Each survey is 1 credit. Once credits have been purchased, you can add your group information by adding a batch and then set up that group by clicking 'Manage.'

The below table shows the list of Batches you (Group Admin) have created. To add new members to a particular Batch or update the Batch click on the **MANAGE** link provided in the last column.


Survey Start Date	Survey End Date	Batch	Survey Status
Aug. 27, 2019	Dec. 17, 2019	Final Test	Completed <a href="#">Download Report</a>


Back

Figure 18. My Survey Dashboard Page

## 4. Search

The search function provides the Group Admin an opportunity to check the details of the employees registered in their Group Admin account. The Group Admin can type in the employee's email address or name in the search bar or filter by survey completion status.



Log out 

Search

Status

-----

▼

No of results

⬆

Search

Employee Name	Email	Status	Batch
A1 B1	anibejai16@gmail.com	Completed	t1
A2 B1	anusha.b@pacewisdom.com	Completed	t1
A3 B1	anushatesting777@gmail.com	Completed	t1
Ccv Rrf	anusha.b+07@pacewisdom.com	Not Started	t1

« < 1 2 > »

Back

Figure 19. Search

## Delete Batch

When Clicking on the “Delete” icon, the Group Admin is able to delete the respective batch. You can only delete a batch if no individuals are assigned to it.

## Managing Batches

Select the “Manage” option in the table to modify the batch details and to also add employees to the batch.

In the Batch Dashboard, there are four main buttons:

1. Generate Group Report
2. Send Reminder
3. Add an Employee
4. Download All Reports

Total Credits Purchased = 130

Credits Available to Use = 129

**Batch: HIJ Batch Dashboard**  
You can add an employee manually by clicking on the 'Add An Employee' button OR you can click on the template for bulk upload.  
You can click 'Generate Group Report' to create a group report.

Generate Group Report

Send Reminder

Add An Employee

Download All Reports

Batch Name = HIJ Batch

Number in this Batch = 0

Timezone = Asia/Kolkata

Start Date: March 1, 2024, 10:26 p.m.

End Date: March 13, 2024, 10:26 p.m.

A reminder e-mail will be automatically sent 2 days prior to the End Date to all participant(s) who have not yet completed the survey.

Send 7 Day Reminder

✓

Participant(s) can download their individual reports

YES

[Click Here to download template for bulk upload\(.csv file\)](#)

Choose File No file chosen

Click here to Bulk Upload

Employee Name	Email	Status	Launch Date (Asia/Kolkata Time)	Reminder Date (Asia/Kolkata Time)	Completion Date (Asia/Kolkata Time)	Send Invitation or Reminder
---------------	-------	--------	---------------------------------	-----------------------------------	-------------------------------------	-----------------------------

Back

Figure 20. Group Admin Batch Dashboard

### a. Adding Employees:

To add an employee, Select the “Add an Employee” button and enter their First Name, Last Name, Email and Confirm Email and then click Submit.

PPS  
Public Works Department

Log out

Add an Employee

First Name First

Last Name Last

Email shwetha.s+12@pscwisd.com

Confirm email shwetha.s+12@pscwisd.com

Submit Back

Privacy Policy

Figure 21. Add an Employee

If you wish to add more than one employee at once, select “Click Here to Download Template for Bulk Upload”. A .csv sheet is directly downloaded.

You can only load 50 participants at a time using the bulk upload file. If your group is larger than that, you will need to submit multiple bulk upload files.

Enter the details in the sheet and save the file as a .csv. Choose the file to upload by clicking the “Choose File” option. Finally, select the “Click Here to Bulk Upload” button to upload the employee details. *NOTE: Do not change/modify the field names and headers.*

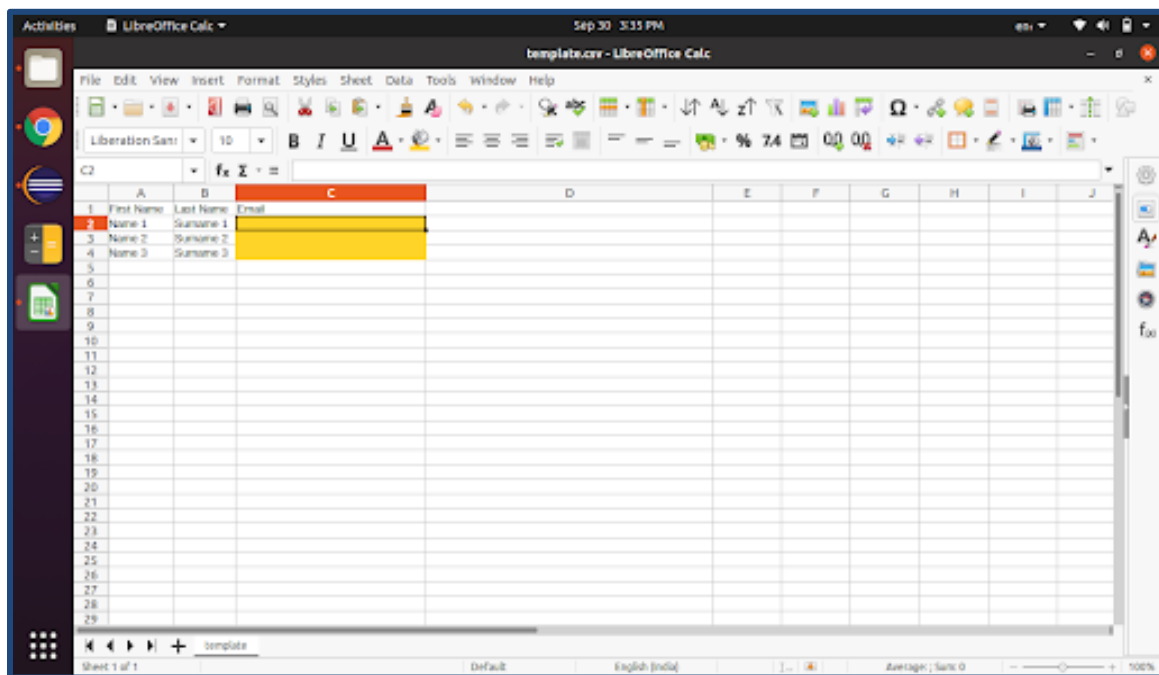


Figure 22. .csv spreadsheet to bulk upload employees

## **Do's and Don'ts when uploading a CSV file:**

### **Do's:**

1. Use Libreoffice v6/7 or MS Excel 2016/2019/365 to edit CSV(Comma Separated Values) files.
2. After copying data from XLSX sheet to CSV file use File > Save As button to save the file as .csv file in Libreoffice v6/7 as it saves to UTF-8 encoding. In MS Excel 2016/2019/365 Use Save As and from the Save as type drop down select CSV UTF-8 (comma delimited) (\*.csv) to make it compatible with all systems and improve success rate during bulk upload. Make sure Encoding is Unicode UTF-8.
3. When adding latin letters copied from XLSX sheet to CSV file, make sure to double check if latin letters are not saved as diamond (or square) with a question mark when re-opening CSV file in Libreoffice/Excel.
4. Avoid using extraneous spaces/tabs in first names/last\_name/email
5. Use Character map to copy/paste unicode compatible latin or any scripts so that characters comply with UTF-8.

### **Don'ts:**

1. Don't use Tab Separated Values whilst saving a CSV.
2. Don't Save the CSV as CSV Macintosh (\*.csv) in MS Excel as it fails to read during bulk upload process. Instead refer #2 in Do's section.
3. Multiple sheets are incompatible/un-supported in CSV file.
4. Workbook or xlsb are incompatible.
5. Don't use Export As CSV option (CSV and CSV (Tab separated values)) in MS Excel since it adds extra spaces/tabs which may result in failure to properly read the csv file during the bulk upload process. Refer #2 in Do's section.
6. Renaming xlsx to csv will result in data loss and cause formatting issues.
7. Non unicode encoding is not supported.
8. UTF-16 is not recommended. UTF-8 is recommended to ensure wide compatibility.

After the bulk file successfully uploads, a successful message with percentage will be displayed on the dashboard. Automatically all the Employee details are uploaded and stored in the table present on the Batch Dashboard.

template for bulk upload.  
You can click 'Generate Group Report' to create a group report.

[Generate Group Report](#)
[Send Reminder](#)
[Add An Employee](#)
[Download All Reports](#)

Batch Name = XYZ Batch      Number in this Batch = 0      Timezone = America/New\_York  
 Start Date: Feb. 3, 2024, 5:12 a.m.      End Date: Feb. 16, 2024, 5:12 a.m.

A reminder e-mail will be automatically sent 2 days prior to the End Date to all participant(s) who have not yet completed the survey.

[Send 7 Day Reminder](#)
☐

Participant(s) can download their individual reports YES

[Click Here to download template for bulk upload\(.csv file\)](#)
[Choose File](#) template (4).csv
 [Click here to Bulk Upload](#)

100%

Bulk upload successful! Page will be refreshed automatically within 10 seconds.

Employee Name	Email	Status	Launch Date (America/New_York Time)	Reminder Date (America/New_York Time)	Completion Date (America/New_York Time)	Send Invitation or Reminder
<a href="#">Back</a>						

Figure 23. Successful Bulk Upload Display Page

If a Group Admin only has 10 Credits available to use, the bulk file upload will only upload 10 users to the database, even if more are listed on the file. Group Admins will need to make sure they have enough credits for all users listed.

## b. Sending Invitations:

Invitations are automatically sent when the survey start date is reached. If an employee is added to the batch after the survey start date, you will need to update the start date to the new launch date and time so that the newly added employee will receive the survey invitation email **OR** click "Invite" in the column labeled 'Send Invitation or Reminder' to send the invite to that specific person immediately.

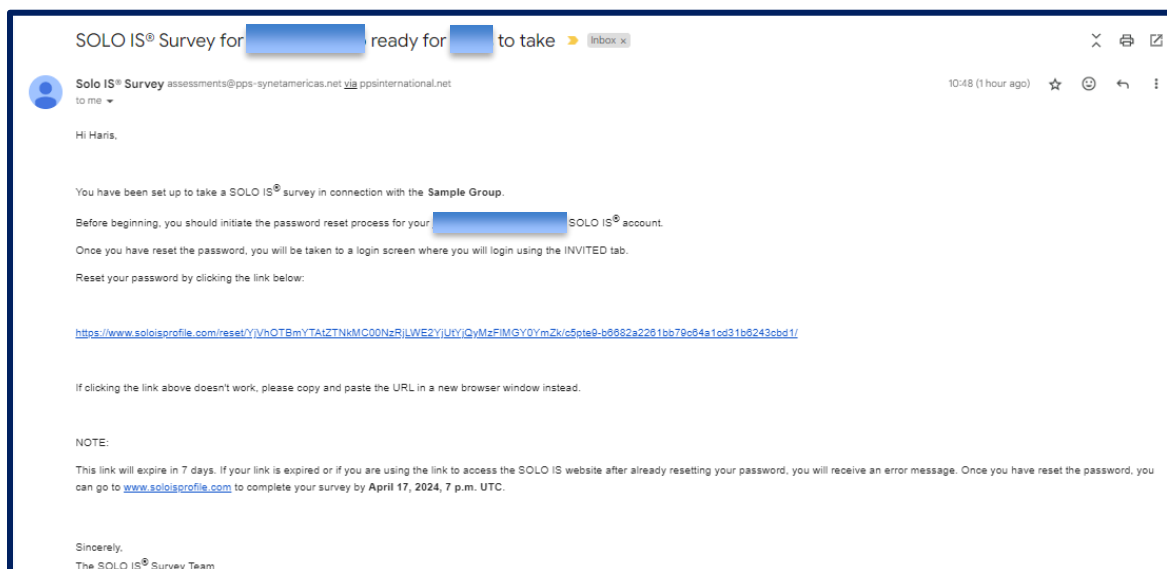


Figure 24. Email invitation to users to start survey.



An email notification is sent to the Group Admin to confirm the invitations have been sent and the assessment launched for that specific batch/employee.

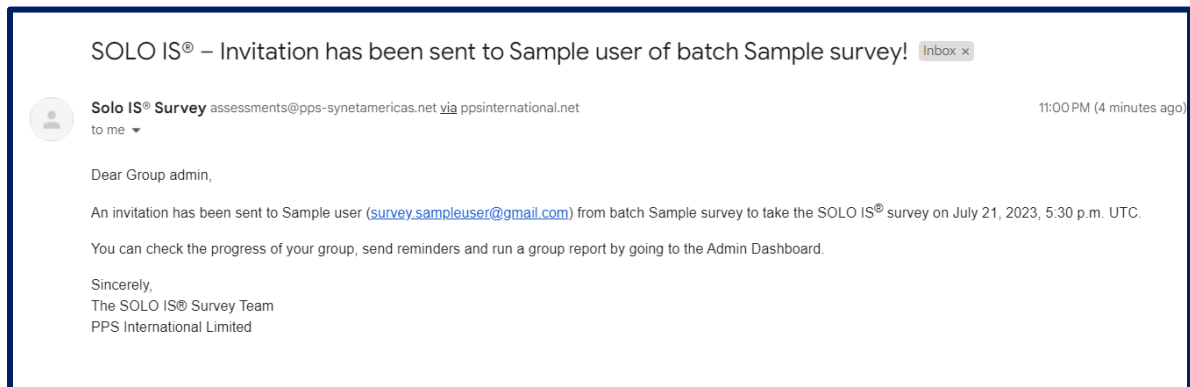


Figure 25. Email to Group Admin confirming a Batch has launched/survey sent.

If an employee needs for the Group Admin to resend the invitation, select “Invite” in the row beside the employee for the invitation to be sent immediately.

Once the invitations have been sent, the Launch time column will update along with Date and Time sent.

Once an employee takes the survey, the status column in the table changes from ‘Not Started’ to ‘Started’ (once started) and then to ‘Completed’ (once completed).

**PPS** Group Admin Dashboard Log out →

[Click Here to download template for bulk upload](#) Choose file Not file chosen Click here to Bulk Upload

Employee Name	Email	Status	Launch Time (UTC Time)	Reminders Sent (UTC Time)	Complete a Batch (UTC Time)	Send Invitation or Reminders
Batch 1 Employee 1	Batch1-1@ppsinternational.net	Not Started	Aug. 7, 2023, 1:30 p.m.	Aug. 7, 2023, 1:30 p.m.		<div> <div>Invite</div> <div>Resend</div> <div>No input</div> </div>
Batch 1 Employee 2	Batch1-2@ppsinternational.net	Not Started	Aug. 7, 2023, 1:30 p.m.			<div> <div>Invite</div> <div>Resend</div> <div>No input</div> </div>
Batch 1 Employee 3	Batch1-3@ppsinternational.net	Not Started	Aug. 7, 2023, 12:45 p.m.	Aug. 7, 2023, 12:45 p.m.		<div> <div>Invite</div> <div>Resend</div> <div>No input</div> </div>
Batch 1 Employee 4	Batch1-4@ppsinternational.net	Not Started	Aug. 8, 2023, 12:33 p.m.			<div> <div>Invite</div> <div>Resend</div> <div>No input</div> </div>
Batch 1 Employee 5	Batch1-5@ppsinternational.net	Not Started	Aug. 8, 2023, 12:33 p.m.			<div> <div>Invite</div> <div>Resend</div> <div>No input</div> </div>
Batch 1 Employee 6	Batch1-6@ppsinternational.net	Not Started	Aug. 8, 2023, 12:33 p.m.			<div> <div>Invite</div> <div>Resend</div> <div>No input</div> </div>
Batch 1 Employee 7	Batch1-7@ppsinternational.net	Not Started	Aug. 8, 2023, 12:33 p.m.			<div> <div>Invite</div> <div>Resend</div> <div>No input</div> </div>

Back

Figure 26. List of users in a batch

### c. Sending Reminders:

The “Send Reminder” button sends a reminder email to all the email addresses in the batch who have not completed the survey.

Once the Group Admin sends the reminder, the Reminder column will update with the date and time sent.

You can also send reminders to individual participants by clicking “Remind” under the “Send Invitation or Remind” column for that specific employee row.

The Group Admin will receive an email confirming that a reminder has been sent to employee(s).

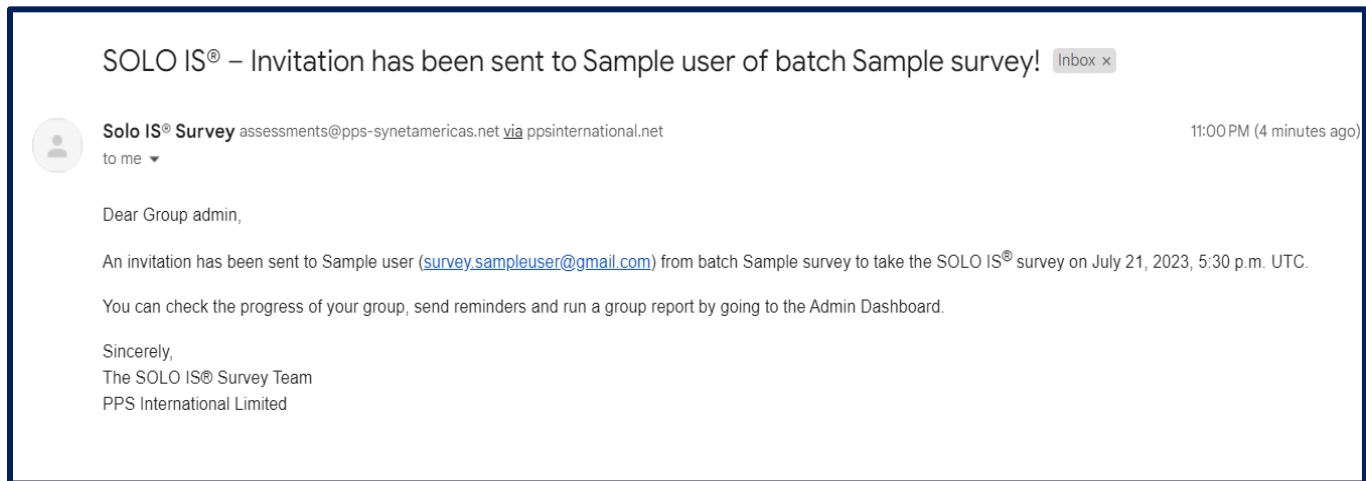


Figure 27.1 Email to Group Admin confirming that a reminder was sent to an individual

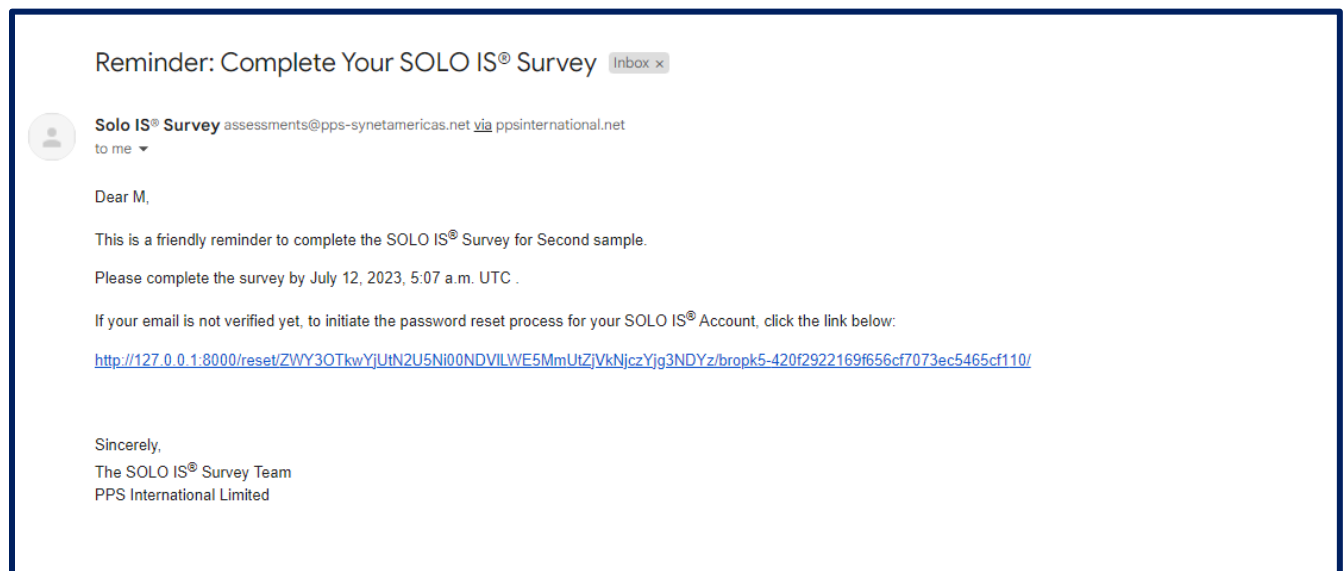


Figure 27.2 Email reminder to individual user

A reminder e-mail will be automatically sent 2 days prior to the End Date of the Batch to all participant(s) who have not yet completed the survey.

If you selected to send an automatic reminder e-mail 7 days prior to the End Date when setting up the batch, a box will show that selection “Send 7 Day Reminder” in the Batch Dashboard. If you no longer want that option, you can uncheck the box and the reminder will not be sent 7 days prior to the survey end date. Once the reminder is sent, the Batch dashboard will automatically update the “Reminder Date” Column.



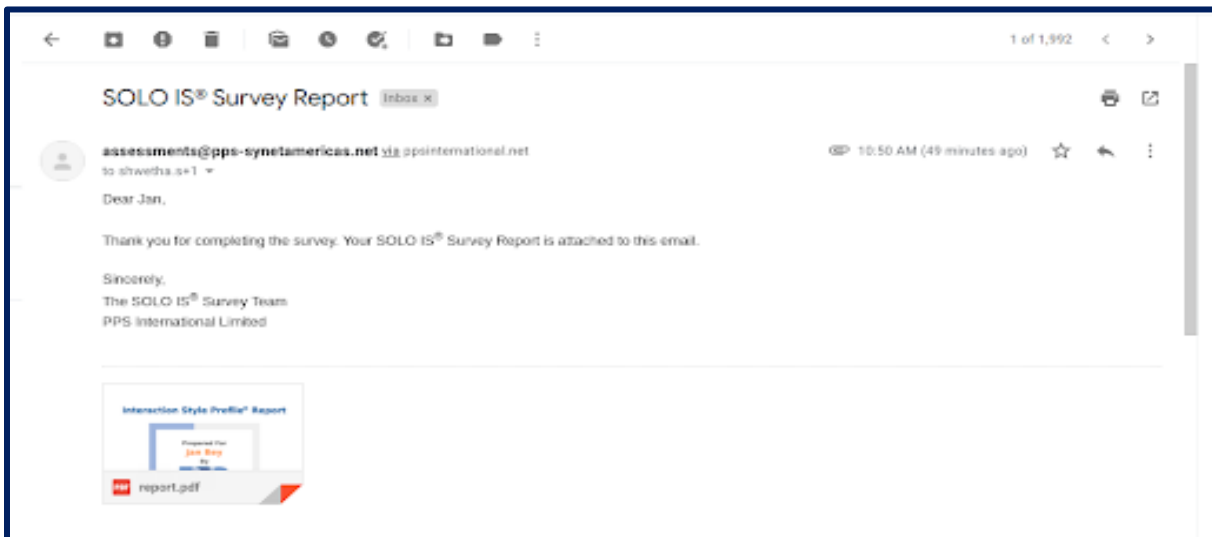
*Figure 27.3 7 Day Reminder Checkbox to send an automatic reminder e-mail 7 days prior to the End Date*

#### **d. Sending Survey Report:**

If a Group Admin selected “Yes” for “Participant(s) can download their individual reports” when setting up their batch, the employee will receive their report via email and also have the ability to view/download their report upon survey completion from their dashboard.

If a Group Admin selected “No” when setting up their batch, the Group Admin can download and print reports or select “Send Report” and manually send the report to each participant. If the report is sent to the participant from the system, it comes from [assessments@pps-synetamericas.net](mailto:assessments@pps-synetamericas.net).

You can change your selection once a batch is set up, by changing “Yes” to “No” or vice versa in the batch dashboard.



*Figure 28. Email to user with group report attached.*

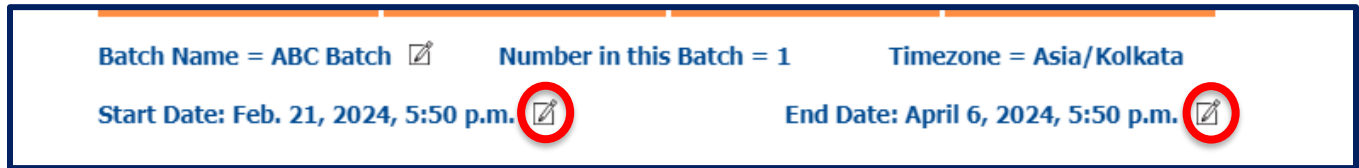
#### **e. Delete Employee:**


An employee can be deleted by the group admin by clicking on the delete icon if the employee has not started the survey. The unused credit will be returned to the Group Admin. If the employee has started the survey, they cannot be deleted by a Group Admin. Group Admins can reach out to PPS International to delete an individual who has completed the survey.

#### f. Changing the Start and End Date and Time:

To change the Start or End Date and Time, click on the icon highlighted in the image below.

*Note: If you are adding employees after the start date and time, reset the date and time OR click 'invite' by their name to send survey immediately. This will not affect the other employees already in the batch.*



Batch Name = ABC Batch  Number in this Batch = 1 Timezone = Asia/Kolkata



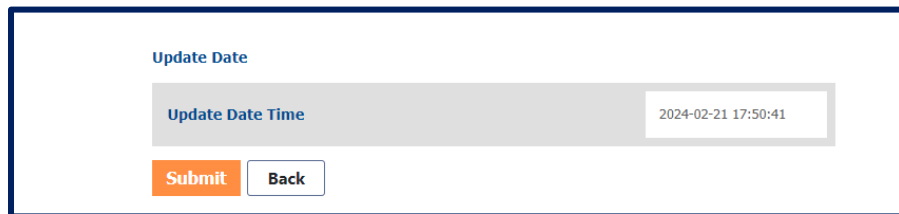
Start Date: Feb. 21, 2024, 5:50 p.m.  End Date: April 6, 2024, 5:50 p.m. 

Figure 29.1 Change Start/End Date & Time in a Batch

Update the Date and Time and select Submit. The date and time will be updated as per the timezone selected while setting up the batch.



Update Date

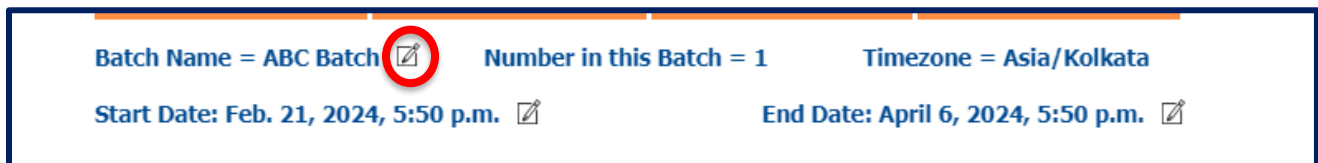
Update Date Time 2024-02-21 17:50:41


Submit Back

Figure 30. Editing Date/time

#### g. Changing the Batch Name:

To change the Batch Name, click on the icon highlighted in the image below.



Batch Name = ABC Batch  Number in this Batch = 1 Timezone = Asia/Kolkata



Start Date: Feb. 21, 2024, 5:50 p.m.  End Date: April 6, 2024, 5:50 p.m. 

Figure 31.1 Changing Batch Name

Rename the Batch and click on "Submit" and the Batch Name will be successfully renamed.



PPS

Log out 

Update Batch Name

Batch Name XYZ Batch

Submit Back

Figure 31.2 Editing Batch Name

## h. Generating Group Report:

To generate a group report, the Group Admin will click on the 'Generate Group Report' button. The report will generate and the button will change to say 'Download Group Report'. Click the button to download the Group Report.

The screenshot shows the PPS Group Admin Dashboard. At the top, there's a header with the PPS logo and 'Group Admin Dashboard' text, and a 'Log out' link. Below the header, there are two status boxes: 'Total Credits Purchased = 50' and 'Credits Available to Use = 22'. The main section is titled 'Batch: EMERALD Dashboard'. It contains instructions: 'You can add an employee manually by clicking on the 'Add An Employee' button OR you can click on the template for bulk upload.' and 'You can click 'Generate Group Report' to create a group report.' Below this, there are four buttons: 'Download Group Report' (circled in red), 'Send Reminder', 'Add An Employee', and 'Download All Reports'. Under these buttons, it says 'Batch Name = EMERALD' and 'Number in this Batch = 6'. There are also date fields: 'Start Date: Feb. 20, 2023, 2:02 p.m.' and 'End date: July 12, 2023, 2:02 p.m.'. Below the dates, there's a link 'Click Here to download template for bulk upload(.csv file)' and a 'Choose File' button. To the right of the 'Choose File' button is a 'Click here to Bulk Upload' button. At the bottom, there's a table with columns: Employee Name, Email, Status, Launch Date (UTC Time), Reminder Date (UTC Time), Completion Date (UTC Time), and Send Invitation or Reminder.

Figure 32. Generate Group Report Button

The Group Admin can generate the group report regardless of survey status completed, not started or started.

The notification box contains the text: 'Group Report is being generated. It will take a few minutes. Please check your dashboard after few minutes by clicking on download report button. A group report will only include those who have completed the survey.' Below the text is an orange button labeled 'Dashboard'.

Figure 32. Group Report Generation Notification

In the generated group report, it will only include the results of those who have completed the survey. The report will reflect a total count of employees and batch report listing employee's style and interpersonal acumen. If the "Not Completed" users will not be completing the survey, it is recommended that the Group Admin remove them from the batch and reclaim the credit(s) for future use.

The Sample Batch Report is shown below.

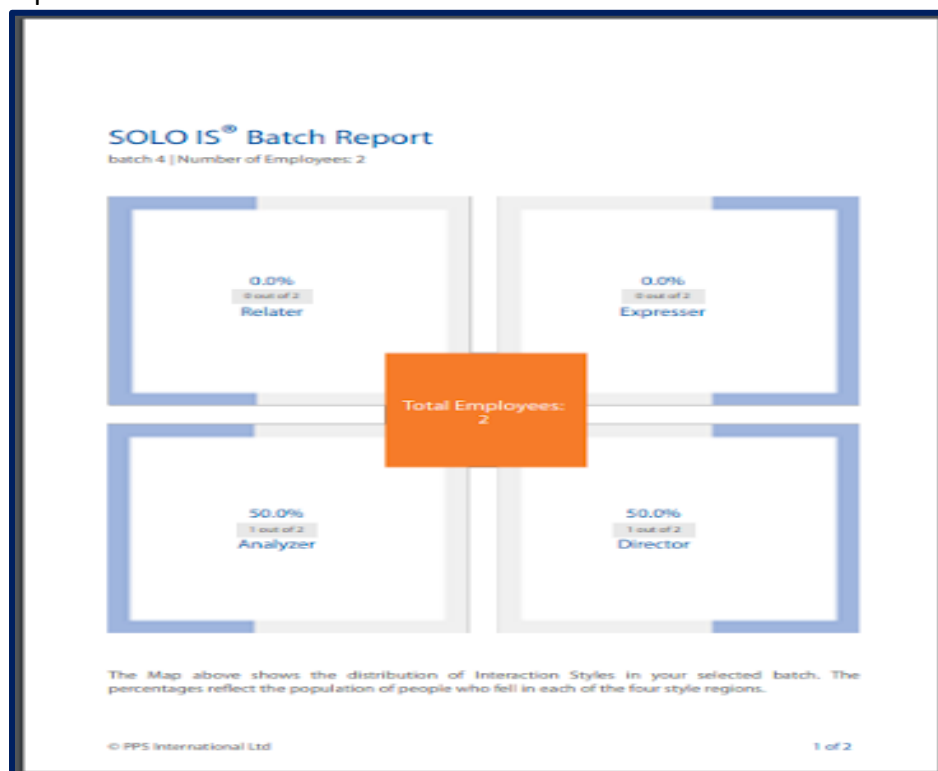


Figure 33. Group Report Page 1

**SOLO IS® Batch Report**

Batch 1 Individual style table and Interpersonal Acumen score

Name	Style	Interpersonal Acumen Score
Skilldom	Analyzer	40-Medium
Skilldom 1	Analyzer	40-Medium

Figure 34. Group Report Page 2

## i. Download all Individual Reports:

To Generate and Download Individual Group Reports, the Group Admin will click on the 'Download All Reports' button.

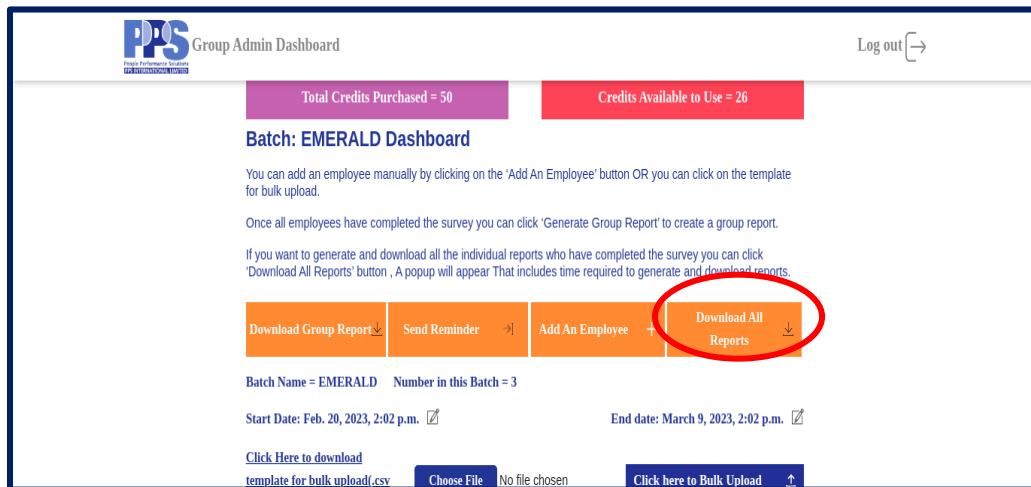


Figure 35. Download Individual group reports

After clicking the 'Download All Reports' button, the system will start generating individual reports for all the people who have completed the survey. Depending on the number of participants and the size of the reports, the download process may take some time. The pop-up message displayed after clicking the 'Download All Reports' button will provide an estimated time for the download to complete.

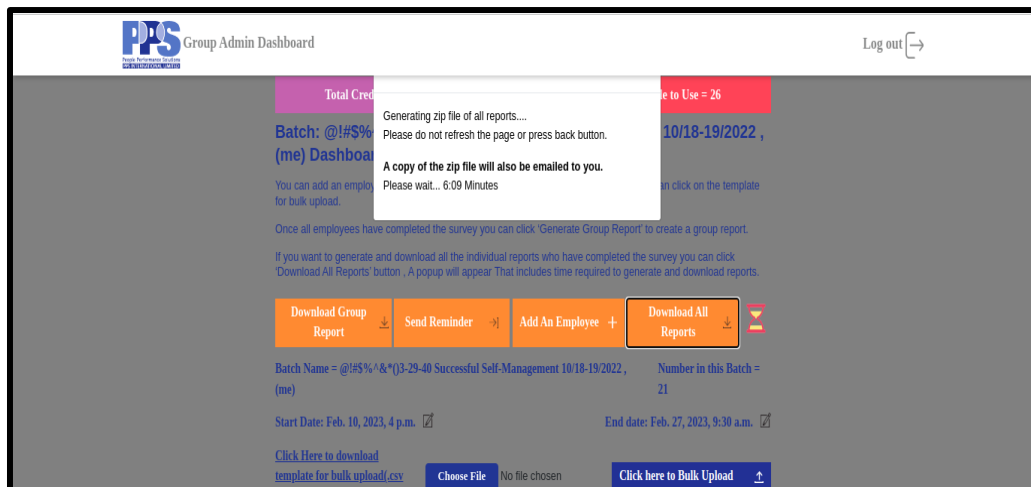


Figure 36. Download Individual group reports popup

Once the download process is complete, all the reports will be automatically saved in a compressed zip file. Additionally, an email containing the zip file will be sent to the group admin's registered email address.

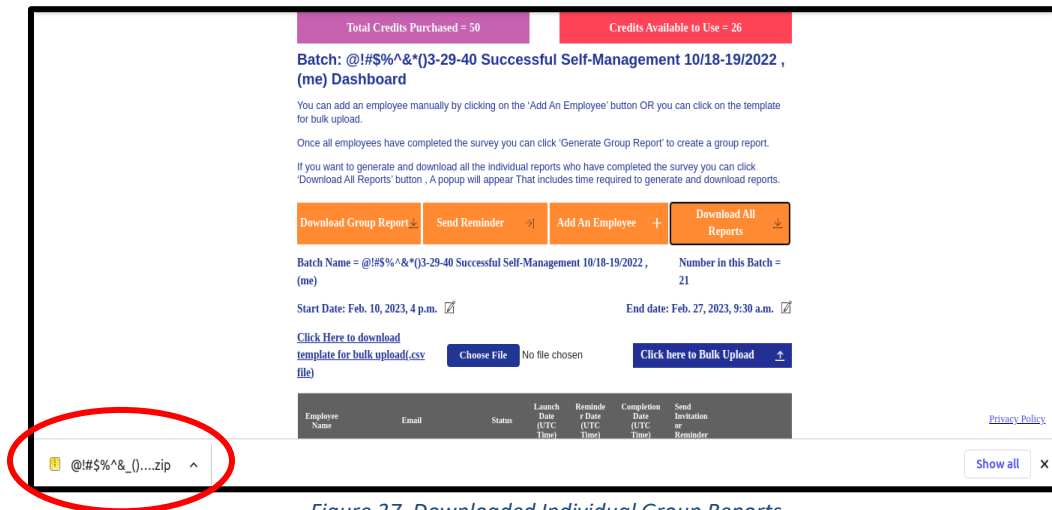


Figure 37. Downloaded Individual Group Reports

It is important to note that only the reports of the people who have completed the survey will be generated and downloaded. If any participants have not completed the survey, their reports will not be included in the downloaded zip file. The group admin can monitor the progress of the survey and send reminders to the participants who have not yet completed the survey.



## Invited User Survey Procedure

Once a Group Admin adds an employee to a batch, they will be sent an email when the survey launches or, if added after the start date, when the Group Admin clicks on the 'Invite' button.

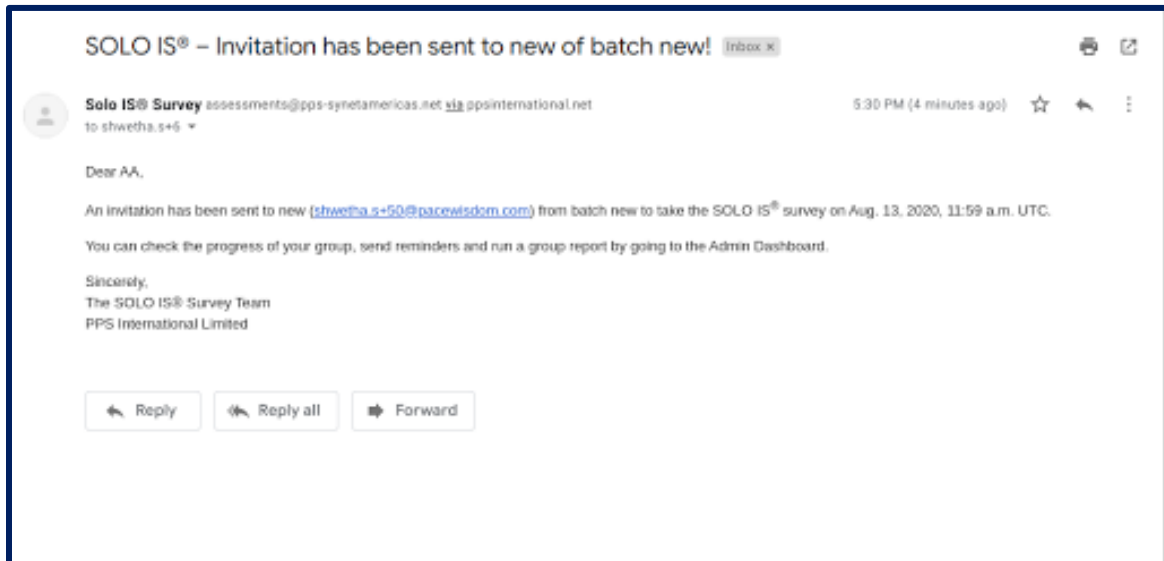


Figure 38. Email sent to Group Admin when survey launched.

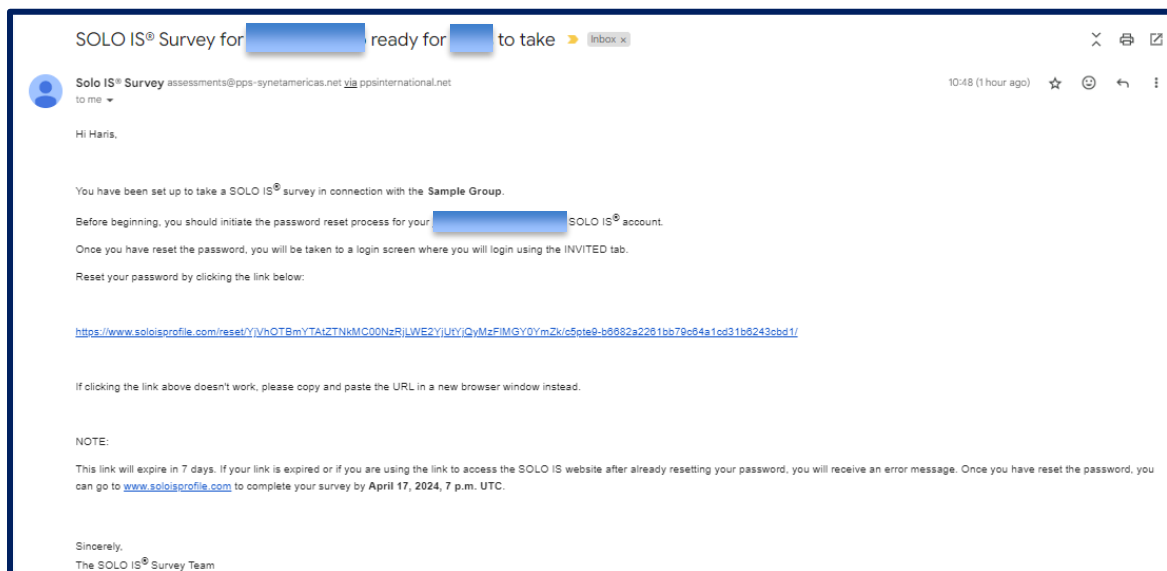


Figure 39. Email to employee to start survey

The Invited user (employee) will need to open the email and click on the reset your password link. The user can reset their password by entering a password in the 'New password' field and then again in the 'New password confirmation' field. Click on the 'Change password' button and a new page will appear confirming the password was successfully changed.

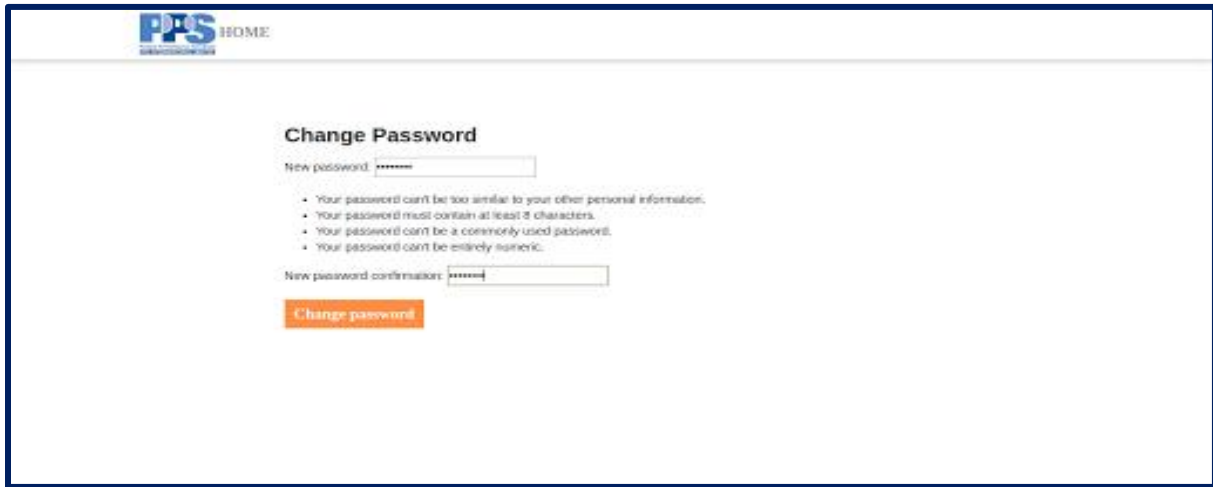
The screenshot shows a web page titled 'Change Password' with the PPS logo and 'HOME' link in the top left. The main content area has a heading 'Change Password' followed by a 'New password' input field with a masked password '\*\*\*\*\*'. Below this is a list of four password requirements: 'Your password can't be too similar to your other personal information.', 'Your password must contain at least 8 characters.', 'Your password can't be a commonly used password.', and 'Your password can't be entirely numeric.'. A second 'New password confirmation' input field with a masked password '\*\*\*\*\*' is below the list. At the bottom is an orange 'Change password' button.

Figure 40. Change Password page for user setup

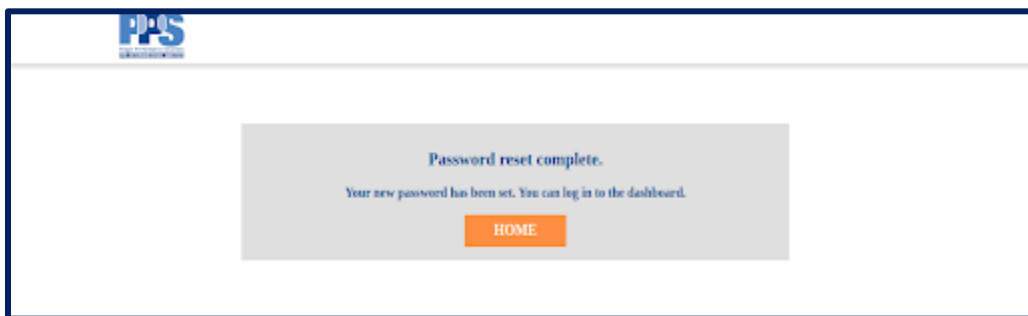
The screenshot shows a confirmation message on a light gray background. The text reads 'Password reset complete.' followed by 'Your new password has been set. You can log in to the dashboard.' Below the text is an orange 'HOME' button.

Figure 41. Confirmation of password reset

The user will then click on the “Home” button and it will take the user to the home page. The user then selects the “Invited” login option.



Figure 42. Invited Button on Home Page

The user enters their login credentials and selects “Sign In.”



Figure 43. Invited (Employee) Login page

Once the user logs in, the Dashboard shown below is displayed. The user will click 'Start Survey' to take the survey.

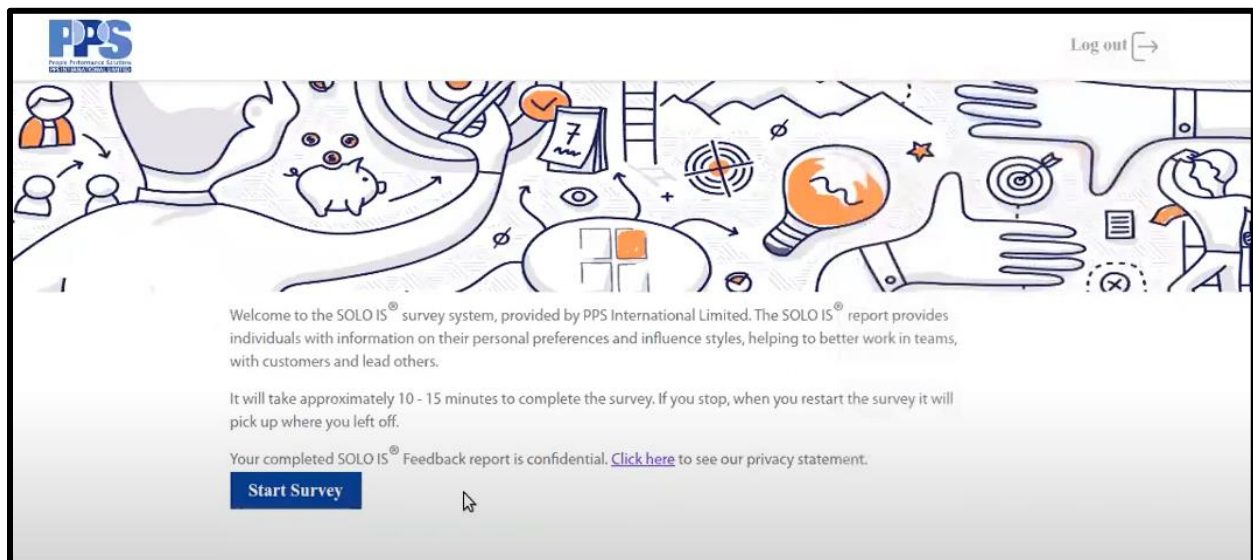


Figure 44. User Survey Dashboard

Before the survey begins, a message pops up that includes information related to the survey. Once the message is read and thoroughly understood, the user clicks the "Start" button.

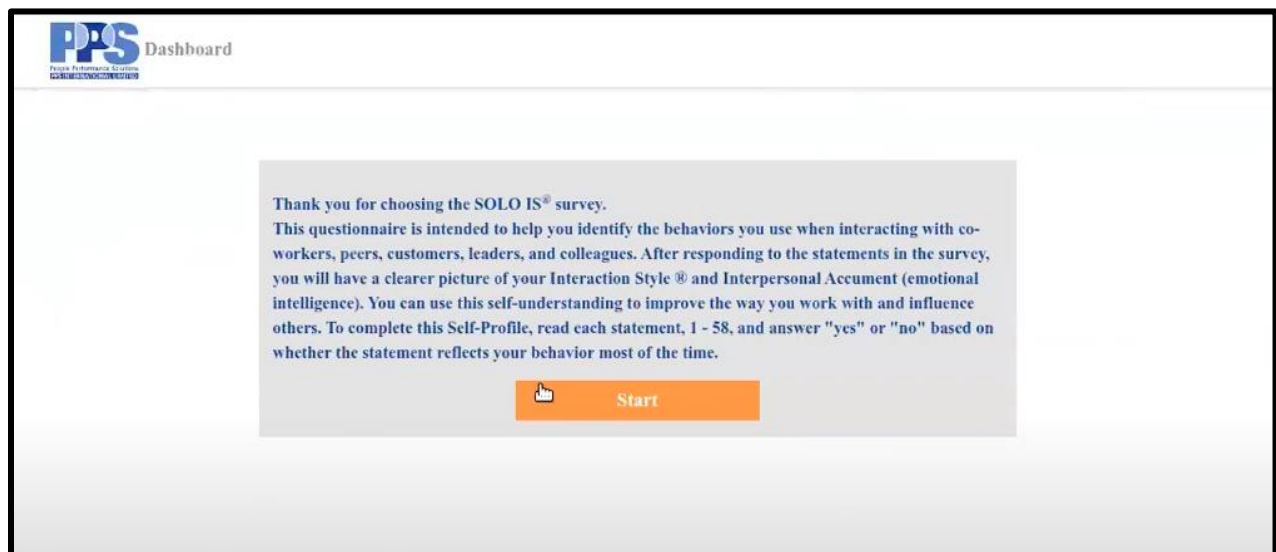


Figure 45. User Survey Instruction Page

The survey has statements with two options as answers. The statements listed in the survey are all necessary to complete.

Once the desired option is selected, click on “Save & Next” to go to the next question. Users cannot go back once a statement is answered.

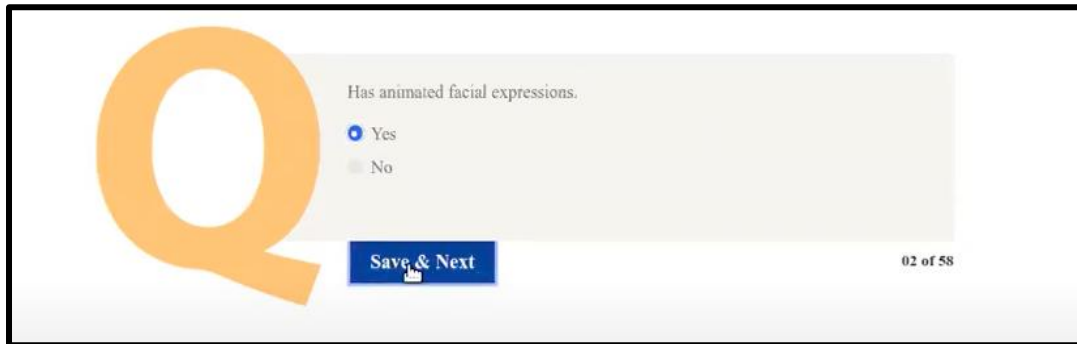
A screenshot of a survey interface. On the left is a large orange letter 'Q'. To its right is a light gray box containing the statement 'Has animated facial expressions.' Below the statement are two radio button options: 'Yes' (selected with a blue dot) and 'No' (unselected with a gray dot). Below the options is a blue button labeled 'Save & Next' with a small mouse cursor icon. In the bottom right corner of the survey area, it says '02 of 58'.

Figure 46. Survey Statement Example - Mid Survey

After all the statements are answered, click on the “Submit” button.

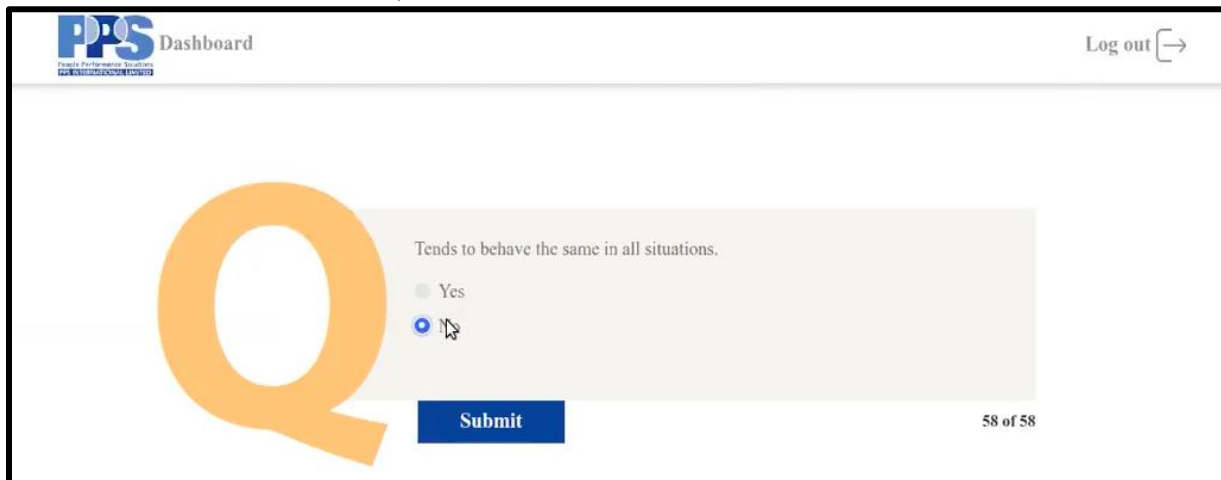
A screenshot of a survey interface. At the top left is the 'PPS Dashboard' logo. At the top right is a 'Log out' link with a right arrow icon. In the center is a large orange letter 'Q'. To its right is a light gray box containing the statement 'Tends to behave the same in all situations.' Below the statement are two radio button options: 'Yes' (unselected with a gray dot) and 'No' (selected with a blue dot and a mouse cursor icon). Below the options is a blue button labeled 'Submit'. In the bottom right corner of the survey area, it says '58 of 58'.

Figure 47. Survey Statement Example - Last Statement

When the survey is successfully submitted, it redirects to another page with a message box for confirmation.

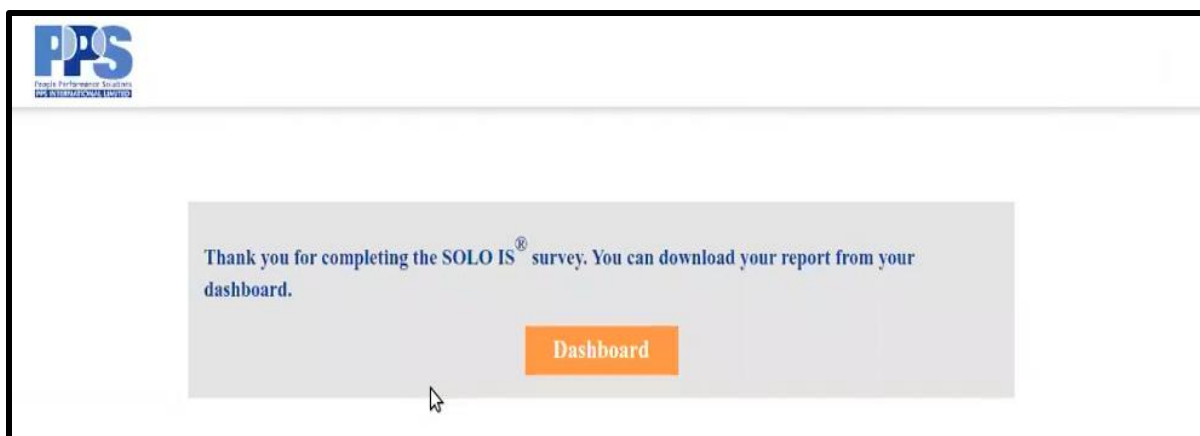
A screenshot of a survey completion page. At the top left is the 'PPS' logo. In the center is a light gray box containing the text 'Thank you for completing the SOLO IS® survey. You can download your report from your dashboard.' Below this text is an orange button labeled 'Dashboard'. A mouse cursor icon is pointing at the button.

Figure 48. Survey Completion page (Show Report)

Click on the “Dashboard” button where the user will find the “Download Report” button if the Group Admin set the batch to “Yes” Show Report while creating the batch.

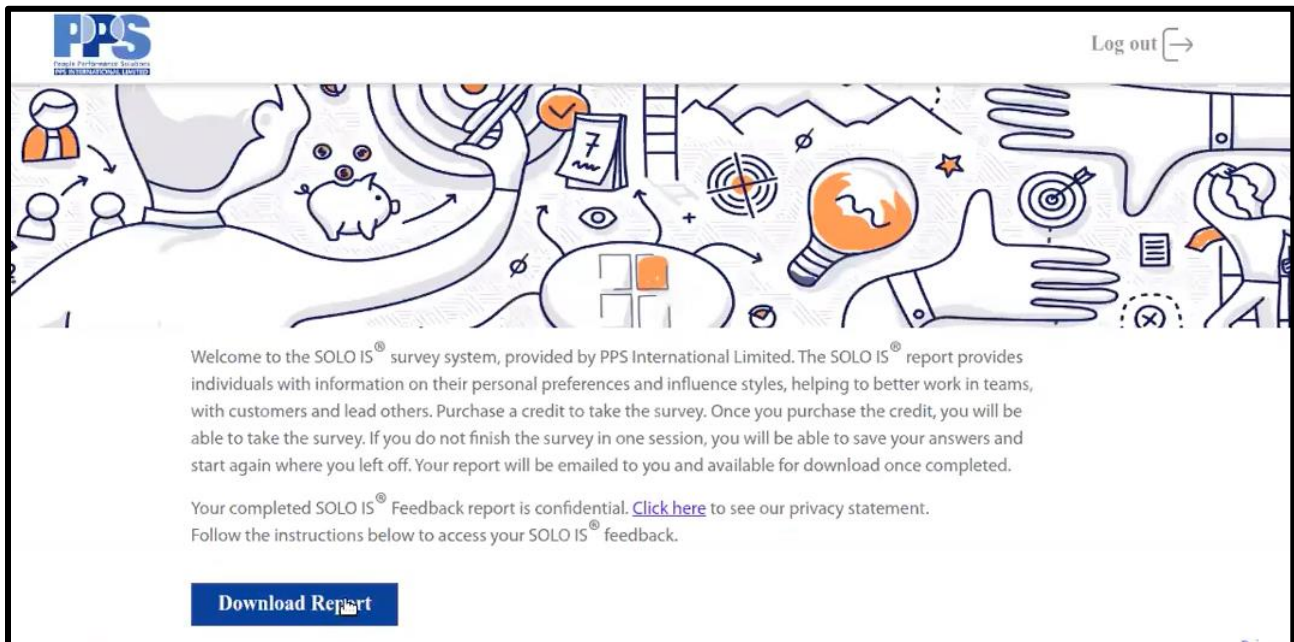


Figure 49. Download Report Button Dashboard (Show Report)

Upon clicking “Download Report”, the user’s report opens in a new tab.

When creating the Batch, if the Group Admin has selected “No” for “Can download individual reports,” the user will see this confirmation notice after completing the survey.

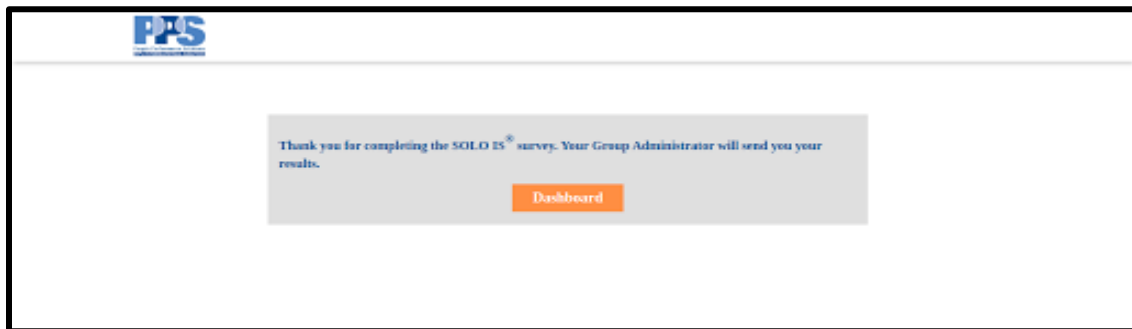


Figure 50. Survey Completion Confirmation page (No Show Report)

When the invited user clicks on the Dashboard, they will not find the Download report button. Only the Group Admin is able to send a report to the user by clicking on the user’s ‘Send Report’ link in the Batch in the Group Admin Dashboard.



Figure 51. Post Survey Dashboard (No Show Report)

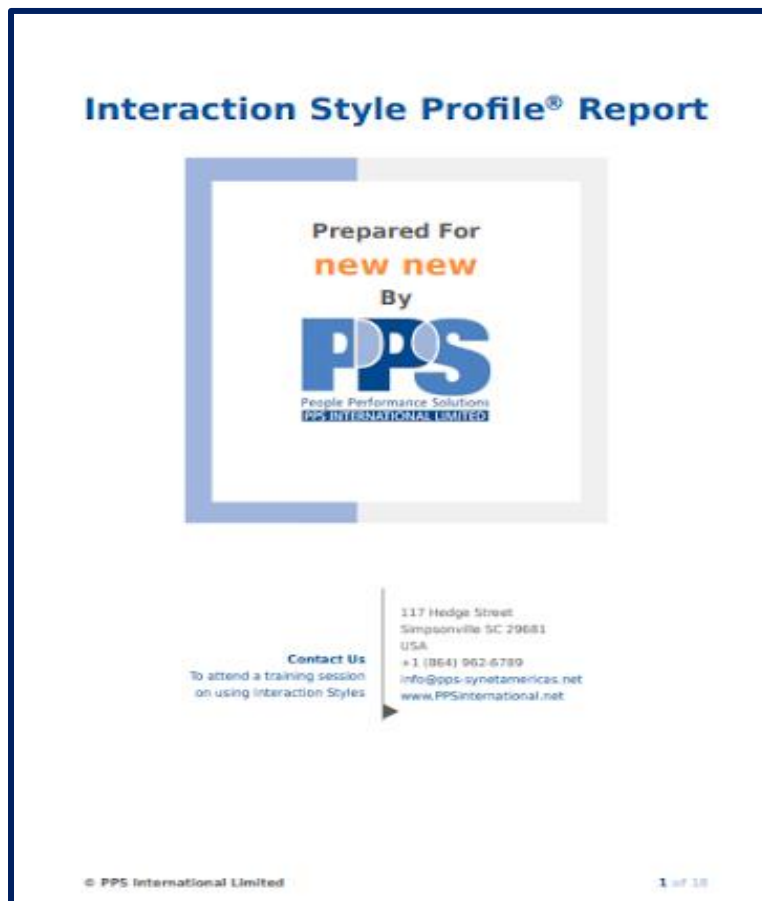


Figure 52. SOLO IS Report Page 1



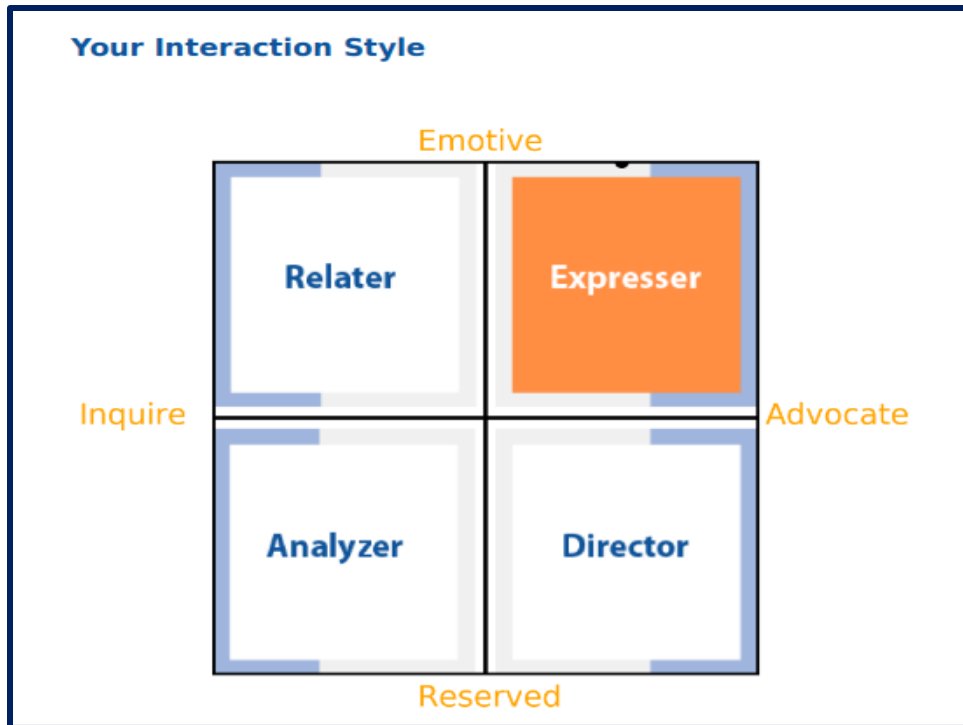


Figure 53. SOLO IS Report Page 4

## Individual Survey Procedure

A user will need to sign up for an “Individual” account. Once the user creates their account, they should log in using their credentials and it will take them to the Individual dashboard.



Figure 54. Individual Login Page





Figure 55. Individual Buy Credit Page Dashboard

The user will need to click on the “Buy Credit” button to purchase the credit to take the survey. The user will be able to see the Buy credit page with the “Pay \$30” button.

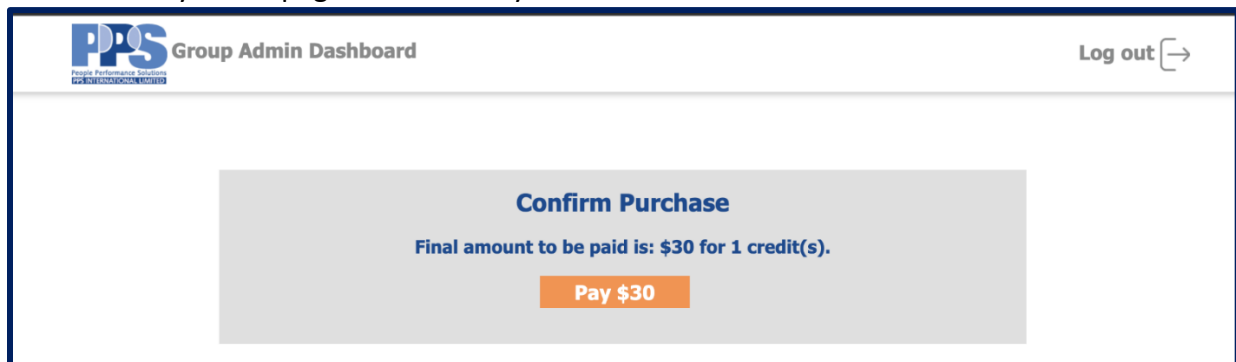


Figure 56. Individual Buy Credit Page

Click on the “Pay \$30” button, and the page will redirect to the form having the necessary Billing details.

Figure 57. Individual Buy Credit Payment Page

Enter the Billing Details such as the Card Number, CVV, Billing Address, etc., and select the “Pay” button.  
*NOTE: Special characters such as # are not allowed, so if a billing address is #455, write No. 455 or Number 455.* Once the payment is successful, the system will generate a transaction ID and a Payment Confirmation notification. Next, they will need to click on the Dashboard button and the user will see the Dashboard page with “Start Survey” button.

If the credit card is charged and a user is unable to take the survey, notify [PPS International](#).

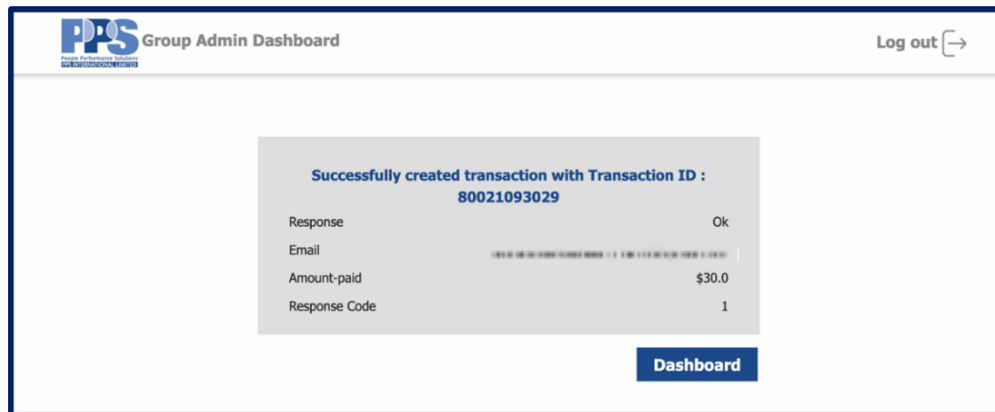


Figure 58. Individual Credit Payment page confirmation

On the Dashboard page click on the “Start survey” button to take the survey.

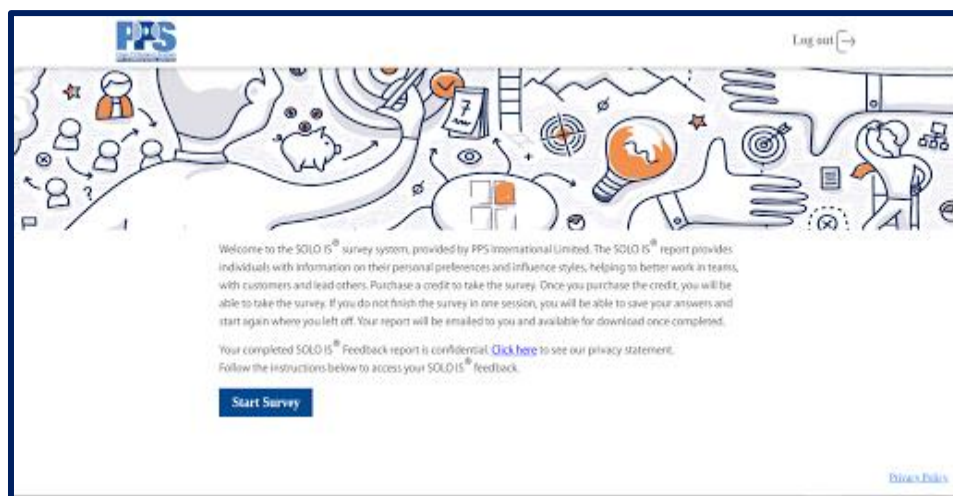


Figure 59. Individual user start survey dashboard

Before the survey begins, a message pops up that includes information related to the survey. Once the message is read and thoroughly understood, the user will select the “Start” button.



Figure 60. Individual user survey instruction page

The survey has statements with two options as answers. The statements listed in the survey are all necessary to complete. Once the desired option is selected, click on “Save & Next” to go to the next statement.

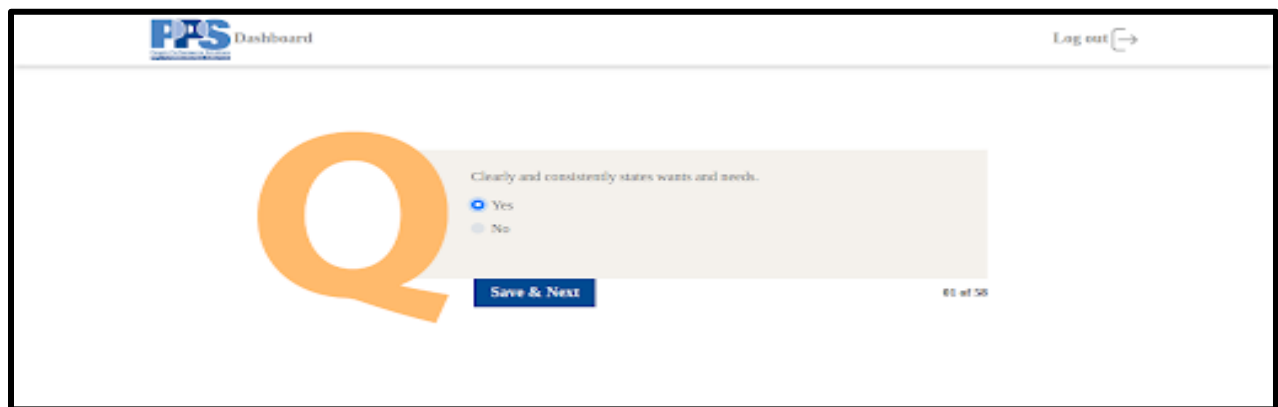


Figure 61. Survey Statement Example - Mid Survey

After all the statements are answered, click on the “Submit” button.

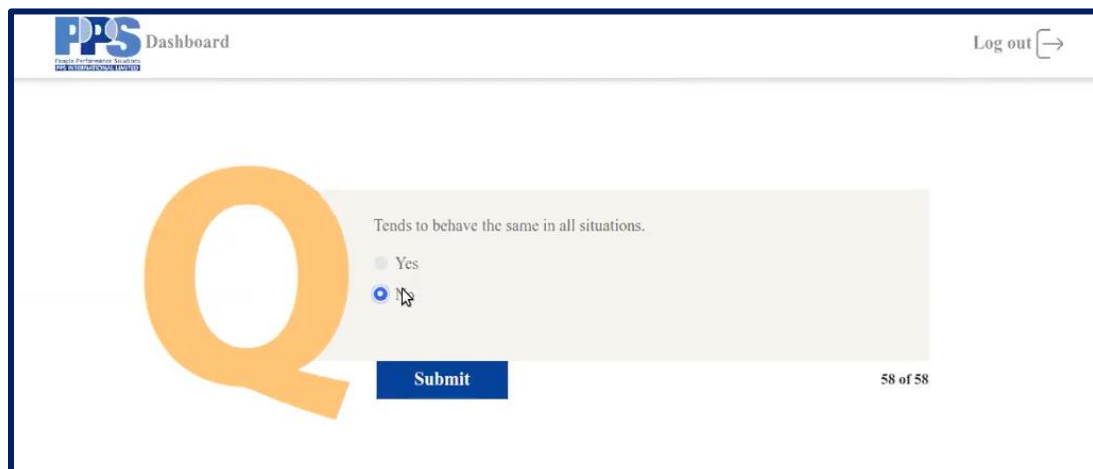


Figure 62. Survey Statement Example – Last Statement

When the survey is successfully submitted, it redirects to another page with a message box for confirmation.

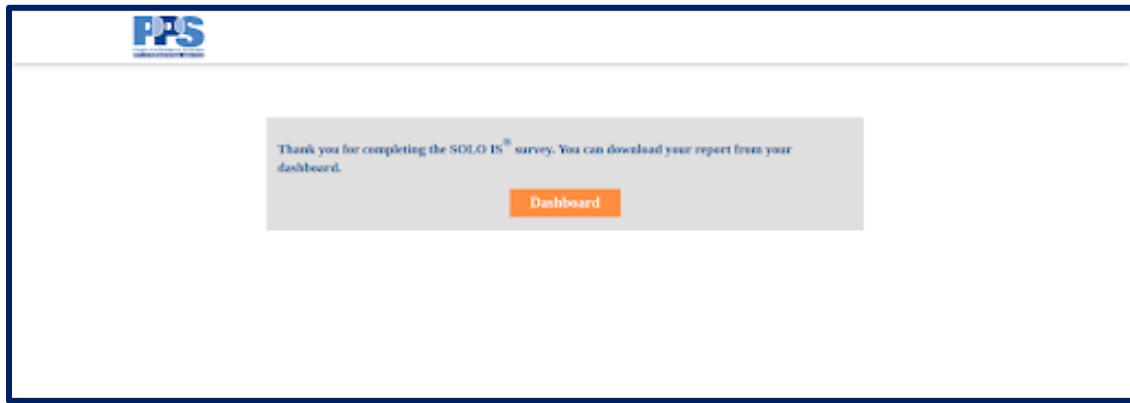


Figure 63. Survey Completion Page

Click on the “Dashboard” button to find the “Download Report” button on the Dashboard page.

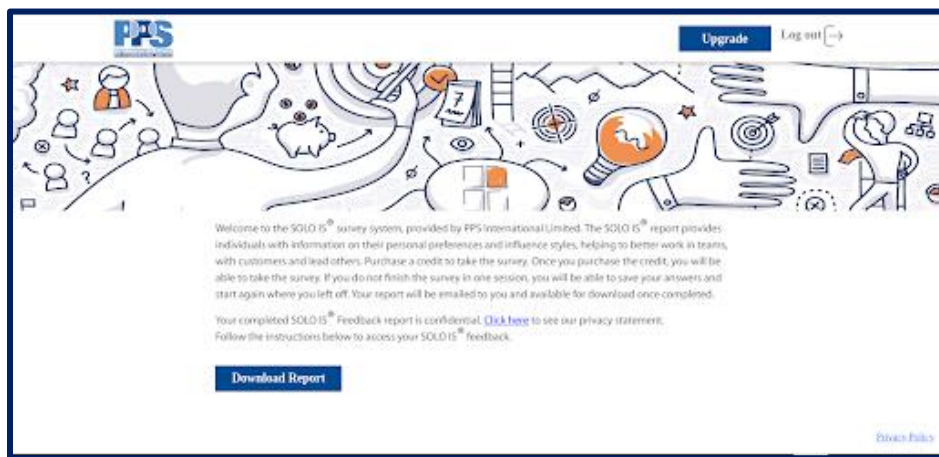


Figure 64. Download Report Dashboard

Click on the “Download Report” button to download the Individual Report and it will open in a new tab. After completion of the survey, the user will also receive an email with their survey report, which they can download.

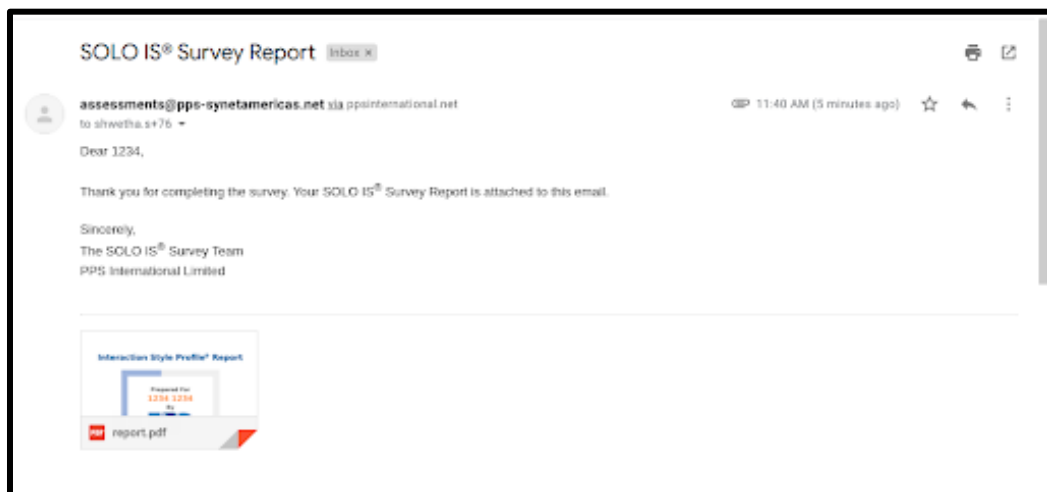


Figure 65. Email to individual with report attached

## Upgrade the Account (Individual or Invited to Group Admin)

After completing their survey, both Individual and Invited users can upgrade their account to a Group Admin account by clicking on the 'Upgrade' button in the top right of the dashboard.

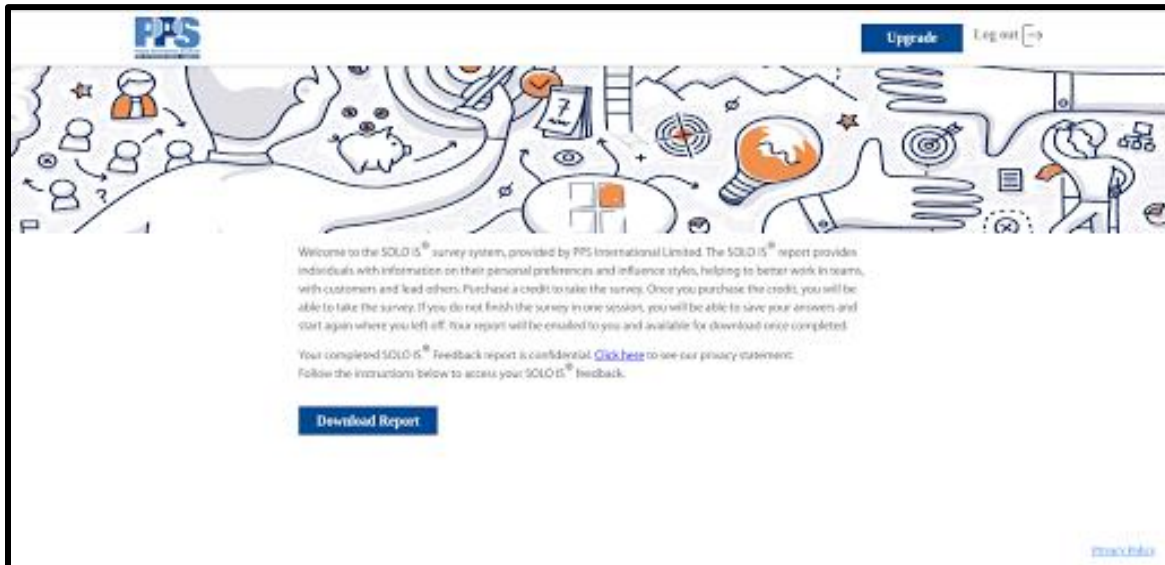


Figure 66. Upgrade Account dashboard page (Individual or Invited only)

When the user clicks on the "Upgrade" button, a pop-up appears saying: "You are about to upgrade your account!!"

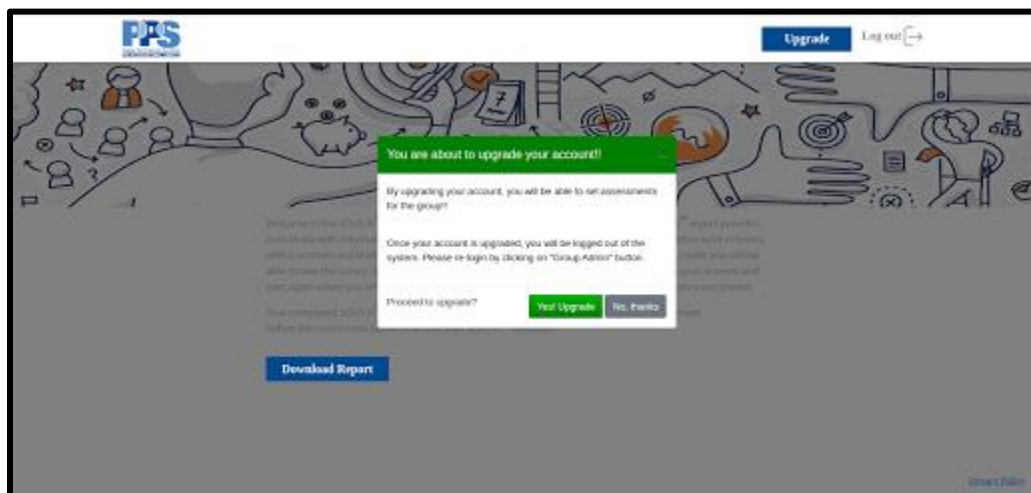
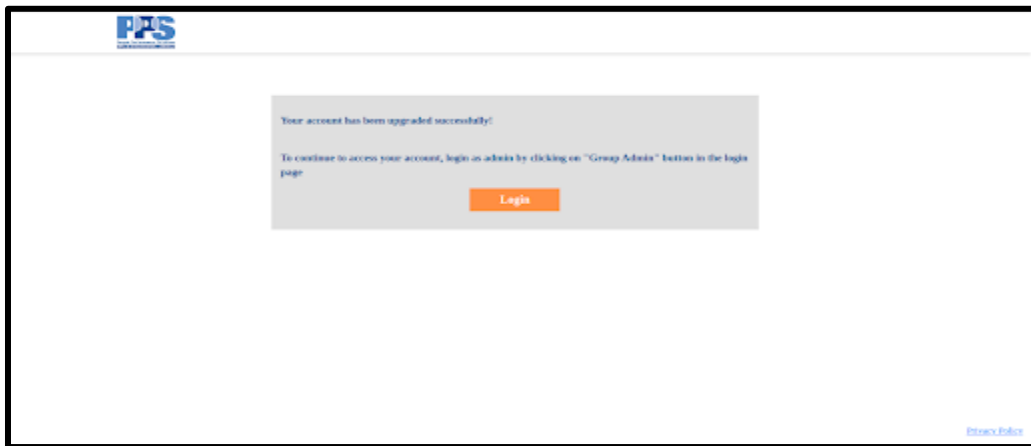


Figure 67. Upgrade Account pop-up display

To confirm the account upgrade, click on the “Yes Upgrade” button and an ‘Upgrade Successful’ page will display.



*Figure 68. Confirmation of Account Upgrade*

The user can continue their account access by logging in as a “Group Admin” on the Login page by clicking on the login button.