FAMILY STYLES

HOW TO LAUNCH THE DISC FAMILY STYLES ASSESSMENT

DISC Professional & Family Styles

STEPS TO LAUNCHING A DISC FAMILY STYLES ASSESSMENT

https://www.onlineworksolutions.com/cgi-bin/disc/account.pl

Welcome to DISC Family Styles!

As a new DISC administrator, you will find these steps useful.

SIGN IN TO YOUR DASHBOARD

BEFORE YOU BEGIN

Set up your DISC Family Styles account at https://www.onlineworksolutions.com/cgi-bin/disc/account.pland create your username and password on the Participant Dashboard Page.

Sign into your account and find the "Create a New DISC Family Survey" button at the top of the page.

You will be taken to a page asking you to input a project name and program ID (You can leave Program ID blank if it is not needed).

Continue by clicking the "next" button at the bottom of the page. You will be taken back to the Participant Dashboard Page. Scroll down until you see your Project Name and click "Continue."

STEP 1: PAGE SET-UP

1 You will be taken to a page to identify your participants to create the welcome message and thank you messaging you want.

2 **ENTER** participant names one by one or you can use the DISC Batch Spreadsheet".

located at discprofessionalstyles.com on the Resources Page

3 **NOTE**: See instructions message on the Default welcome screen text and change it as needed.

4 **NOTE**: See default final page thank you message and change to include your own information.

5 **CLICK**: See "Participants" button at the bottom of the page.

STEP 2: PARTICIPANT DASHBOARD

1 **ENTER** participants and set timelines. Enter your participant's name if one or several or use the DISC Batch Spreadsheet" to batch-import your participants. Set the deadline and time zone.

2 **EMAIL** Invitation Delivery Preferences: Select email delivery options - Send or just Load.

3 **If Send:** Allow the DISC Tool to send emails to participants on your behalf. The emails will come from: martin@onlineworksolutions.com.

4 **If Load:** From your email account send participants your email invitation. The DISC Tool specifies email content and will only load participants on the final Review and Load page. Then you will need to send them an email with the specified link/button.

(The DISC login asks the participant to login with their email address which you have just loaded up. The DISC login checks the participant email address again the DISC database. If it finds the email address it advances the participant to the survey (and emails them login information should they need to login in again to finish their DISC survey). This email address login may only be used once by the participant.

5 **CLICK** "Payment" button at the bottom of the page.

STEP 3: PAYMENT

1. You will be taken to a page to identify your participants and to create the welcome message and thank you messaging you want.

2. You don't need a PayPal account. PayPal will simply process your credit card. **ENTER** your credit card information.

4. If not all your participants complete the Disc, your account will be credited for those "uncollected" Disc reports.

5. **CLICK** "Email" button AT THE TOP of the page to continue.

STEP 4: REMINDERS

1. On this page you will decide on the reminders needed to send to participants.

2. **SCHEDULE** reminders and/or a delayed start date *(optional)*.

3. If you choose to email participants yourself, you can still use the DISC Tool reminders.

4. The DISC Tool will send participants the custom link only to those who have not completed.

STEP 5: REVIEW & LAUNCH

1. **REVIEW** setup options, participant details, email communications, and scheduled dates.

2. **CLICK** "Review and Launch" button at the bottom of the page.

4. **LAUNCH THE DISC** On the Launch Pad, click **SEND**. *You should receive an immediate email notification advising you of a successful DISC launch.*

4. If you choose to email participants yourself, the DISC Tool will only load the participants into the DISC. You still need to email them custom link shown to you in step (5) above.

REPORTING
ADDITIONAL INFORMATION

Once participants have completed the DISC you may start to collect reports. Look for the Reporting button on the Participant Page 2.

You may create and deliver the DISC Report(s) to the email addresses you specify in Option 3 or you may just create them and then download them by clicking on the download arrow under the column Download option.

POST LAUNCH
HOW TO ADMINISTRATE YOUR DISC'S.

Go to the Participant Dashboard Page

LOG IN: If you only have one DISC running, you'll be directed to the participant page; otherwise select which DISC you want to view from your account page.

PARTICIPATION: The Participant Dashboard page 2 displays the real time completion rates.

BAD ADDRESSES: If you have sent/loaded a bad email address, we will notify you to revise and resend the errant email invitation. Do this on the Participant Page 2.

Reminders/Deadline Extensions:
The participants page allows you to send reminders and deadline extensions if you have not already set up pre-scheduled reminders.

- You can send reminders to everyone not completed or selected individuals.

- Use the Email Page 3 to add a preface to specify the urgency of your reminder.

- Then back on the Participant Dashboard Page 2, select the appropriate checkboxes and click Revise/Resend button at the bottom of the page to send reminders.

FAQ
POST LAUNCH

How do I add participants after DISC is launched?
Under the participant table look for "Add Members". Select the number of participants/rows to add. and click on the yellow plus sign to the right. Rows will be added to the bottom of the participant table above. Enter new contact information in the new empty rows. Check the Send now or Load now checkbox in the row and click on the Send now or Load now button.

How do I pay for additional participants after DISC is launched?
You may have already collected credits, that is, you paid for X Disc surveys, but only Y completed, so you have X - Y credits. These credits will be used to pay for the occasional persons you add after you have launched to a group of participants.

DISC
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4 STEPS TO LAUNCHING A DISC PROFESSIONAL STYLES TEAM ASSESSMENT

Welcome to DISC Professional Styles Teams!

A valuable, complimentary resource available to you!
As a new DISC administrator, you will find these steps useful.

SIGN IN TO YOUR DASHBOARD

BEFORE YOU BEGIN

Sign into your account, go to the dashboard on page 2 and locate the participant group you want to generate a report for.

STEP 1 Find the participant group and click the "Display" button.

STEP 2 Click the "Reporting" button at the top of the page.

STEP 3 Proceed to the bottom of the page and click on "Create Team Report."

STEP 4 Stay on the page and page up to the list of names. At the bottom of the list, you will see "Team Report" on the left and a down-arrow to generate the report on the right. Clock on the down-arrow, and your report should be immediately generated.

DISC
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4 STEPS TO CREATING A DISC PROFESSIONAL STYLES TEAM REPORT

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