

TUTORIAL:

CREATING A BASIC (NON MULTI-RATER) CAMPAIGN with DATA DOWNLOAD

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INTRODUCTION

Welcome to Transform™ – Mind Garden’s system for conducting surveys and assessments.

This tutorial provides step-by-step processes for creating and managing basic (non multi-rater) campaigns with data download. This tutorial will be most beneficial to customers who have purchased Transform™ Survey Hosting for a non-multi-rater instrument and are ready to begin collecting data. **If you have purchased Transform™ Survey Hosting for a multi-rater instrument, please reference the “Multi-rater Campaign” tutorials available on the Mind Garden website. If you are a participant, please reference “Tutorial – Using Mind Garden’s Transform™ System” document also available on Mind Garden’s website.** Don’t understand these terms? Please refer to our [Key Terms](#) page.

Please read through the entire chapter of interest – many clarifications and responses to frequently asked questions are detailed throughout the chapter. Still have questions? [Contact Mind Garden](#) – we’re happy to help!



“What sunshine is to flowers, smiles are to humanity. These are but trifles, to be sure; but scattered along life’s pathway, the good they do is inconceivable.”

- Joseph Addison (1672-1719)

English essayist, poet, playwright, and politician

HOW TO LOGIN

Go to Mind Garden's home page (www.mindgarden.com) and click **Login** from the top menu. This will take you to the login page below.

The screenshot shows the Mind Garden login page. At the top left is the logo "transform by mind garden.com". To the right is a landscape image of a lake and trees. Below the logo is a large green banner. The main content area contains two forms:

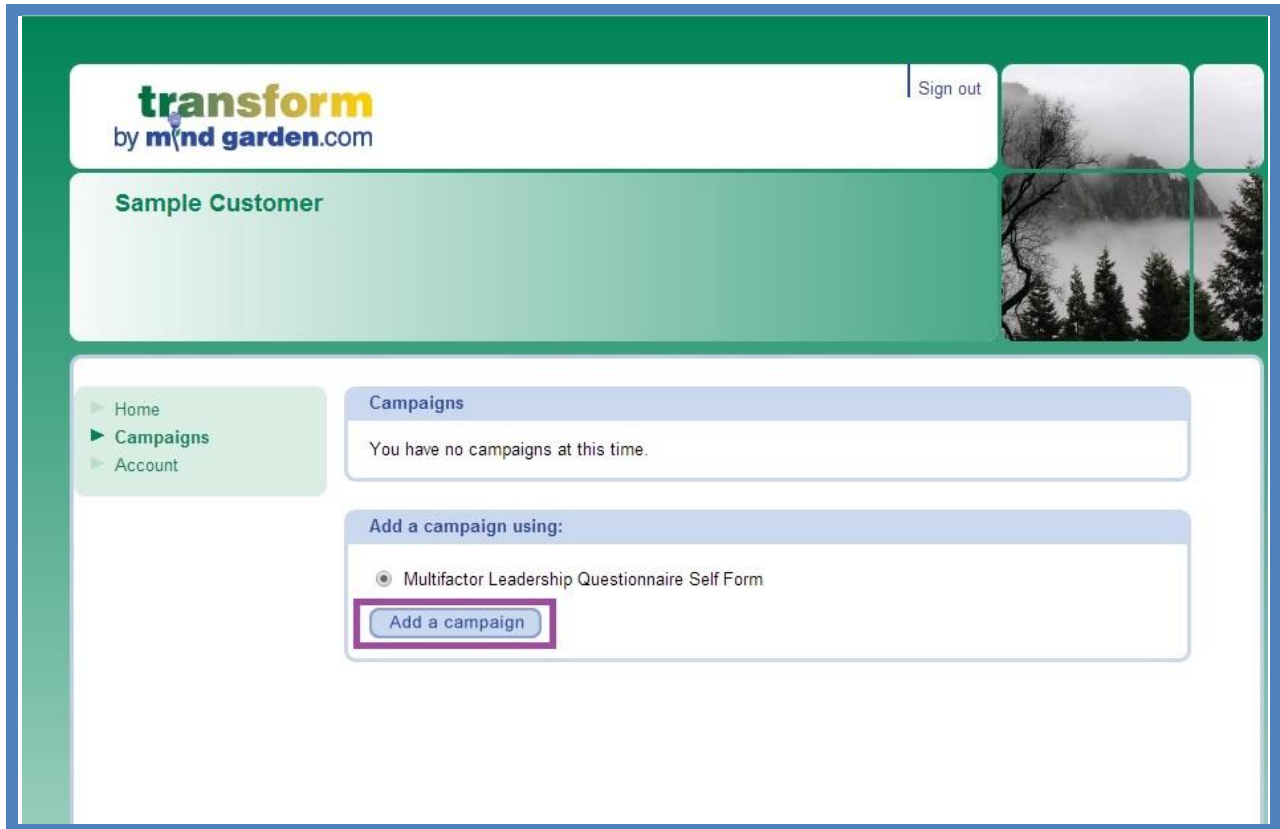
- Please log in** (blue header):
 - Email address:
 - Password:
 - Login button
 - [I forgot my password](#)
- New to Mind Garden? Create a Login.** (green header):
 - Email address:
 - Reenter:
 - Create password:
 - Reenter:
 - I agree to Mind Garden's terms of service.
 - Create button

New users: Use the **green box** to enter your email address and create a password. Check the box below to agree to Mind Garden's terms of service, and then click **Create**.

Returning users: Use the **blue box** to enter you email address and password. If needed, click **I forgot my password** to receive a temporary password. Once you receive the new password via email, you may change the password to one of your choice via the Account menu.

Successful login will take you to your Transform™ Portfolio home page.

CREATING A CAMPAIGN



You will need to purchase Transform™ Survey Hosting for an instrument before you create a campaign, either through www.mindgarden.com or by [contacting Mind Garden](#). You will need to create a campaign before you can use your purchased licenses.

Once you have purchased Transform™ Survey Hosting, login to your Transform™ account and click on **Campaigns** in the left menu. This action will take you to the Campaigns page. Here, you can click on existing campaigns to review or edit, or you can add a new campaign. To add a new campaign, select the instrument you wish to use and then click the **Add a campaign** button at the bottom of the list.

Note: If you purchased Transform™ Survey Hosting through the shopping cart, a campaign will be automatically set up for you. You will see your preset campaign in the Campaigns box.

The Transform™ system will step you through the tabs from left to right.

The screenshot displays the 'Campaign Details' page in the Transform™ system. On the left is a navigation menu with options: Home, My Reports (1), Campaigns (highlighted), and Account. The main header shows the campaign title 'Apr 2014 for MLQ - Top management' and a 'Return to campaign list' link. Below the header are several tabs: Campaign Details (active), Response Deadline, Email, Participants, Data Download, and Licenses. The 'CAMPAIGN DETAILS' section includes: Instrument: MLQSelf - Multifactor Leadership Questionnaire Self Form; Campaign name: Apr 2014 for MLQ - Top management (with a text box and an 'Update' button); Default language: English (English) (with a dropdown menu); Campaign Status: Campaign Active (with a dropdown menu). Explanatory text states that the campaign name can be changed to reflect participants, and that a closed campaign cannot accept new responses or participants.

After you click **Add a campaign**, you will be directed to your new campaign’s administration page. The first tab, **Campaign Details**, allows you to change the campaign name, choose your default language, and to change the campaign status (campaign active vs. campaign closed). Most people like to identify campaigns by a group name and the approximate date of the administration of the instrument – for example, “Apr 2014 for MLQ – Top management”.

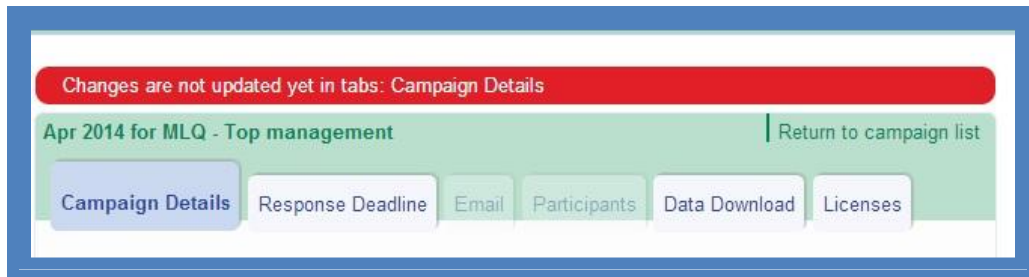
Default Language determines which language your participants will automatically view the assessment. All Mind Garden instruments are available in English; other language availabilities vary for each instrument.

Campaign Status specifies whether your campaign is able to collect data (Campaign Active) or if your campaign will reject additional data (Campaign Closed).

There is no limit to the number of campaigns you can create, but you can use only one instrument in a campaign.* If you wish to use a different instrument, you must purchase Transform™ Survey Hosting for that instrument and set up a separate campaign.

***Exception:** If you purchased a Custom Form, your license may allow you to include more than one instrument in a campaign. [Contact Mind Garden](#) for more information about Custom Forms.

If you change the name of the campaign from the default name or change the default language, be sure to click **Next** (this button will change to **Update** after the first time) to save your changes. An error message at the top of the Campaign tabs will appear if you have not clicked **Update**. You can change a campaign name at any time.



RESPONSE DEADLINES

The screenshot shows a web interface for managing a campaign. At the top, a green banner reads "Campaign Details updated." Below this, the campaign name "Apr 2014 for MLQ - Top management" is displayed, along with a "Return to campaign list" link. A navigation bar contains several tabs: "Campaign Details", "Response Deadline" (which is highlighted in blue), "Email", "Participants", "Data Download", and "Licenses". The main content area is titled "RESPONSE DEADLINE" and contains a text box for "Participant deadline:" with the value "ASAP" entered. Below the text box is a blue button labeled "Next >".

In the **Participant deadline** box, enter the date that you would like the participants to complete the assessment. The default setting for response deadlines is ASAP. We recommend you set an actual date if possible in order to maximize your response rate. Near-term dates are better since most people will quickly respond. With a long-term deadline, people are more apt to set aside the response task for a later time and forget to complete the assessment.

This response deadline is not enforced by the Transform™ system, but it will be included in all email invitations and reminders sent via Transform™. Treat the deadline box as a text box – describe your deadline however you like.

You can change the response deadlines later in your campaign if you wish, however you will need to resend the email (by clicking the **Resend** button in the **Participants** tab) to all participants who have not completed the survey.

Click **Next** when you are ready to move to the next tab.

EMAIL

Apr 2014 for MLQ - Top management | [Return to campaign list](#)

Campaign Details | Response Deadline | **Email** | Participants | Data Download | Licenses

I'll Send My Own Email to Participants

Just Use the Mind Garden Email

Email will be sent from Mind Garden to each participant when you add their name. You can add to this email with the option below. The samples reflect any text you may have added.

> [Preview a sample participant email](#)

Add to the Mind Garden Email

You can customize the subject line of the email sent to participants, and also add some introductory text that will be displayed before the text of the standard email message. If you want to use the standard subject, just leave the field blank. You can also include special keywords, to include the participants name and other data ([more info](#)).

Subject line for email to participants:

Introductory text for email to participants:

[Next >](#)

Please read this entire section before proceeding in the Transform™ system.

You have several options for inviting people to participate in your assessment(s).

OPTION 1 (default): Just Use the Mind Garden Email

If you choose the “**Just Use the Mind Garden Email**” you can preview a sample participant invitation email.

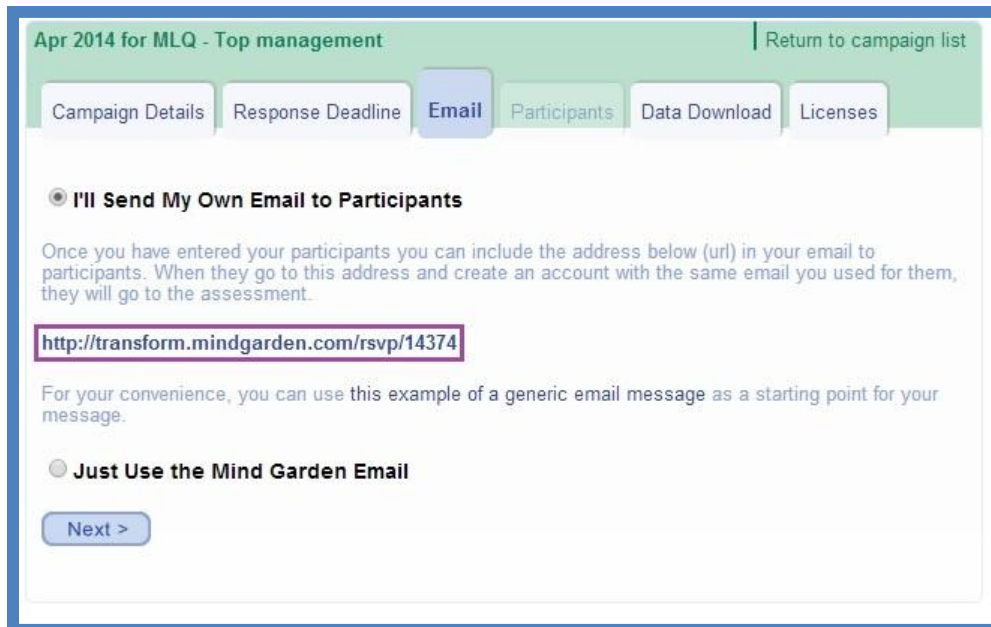
With this option, it is important to note that the email message will be sent immediately when you enter the names and email addresses of participants into the system on the Participants tab. Click **Next** to save your changes and to move to the next tab.

OPTION 2: Add text and a customized subject line to “Just Use the Mind Garden Email”

If you choose to add text to the Mind Garden email, your text will appear before the Mind Garden text in the email. You can also change the email Subject Line if you wish.

With this option, it is important to note that the email message will be sent immediately when you enter the names and email addresses of participants into the system. You can review your added text by clicking “Preview a sample participant email” after clicking **Next/Update** to save changes.

OPTION 3: “I’ll Send My Own Email to Participants”



Apr 2014 for MLQ - Top management | Return to campaign list

Campaign Details Response Deadline **Email** Participants Data Download Licenses

I'll Send My Own Email to Participants

Once you have entered your participants you can include the address below (url) in your email to participants. When they go to this address and create an account with the same email you used for them, they will go to the assessment.

<http://transform.mindgarden.com/rsvp/14374>

For your convenience, you can use this example of a generic email message as a starting point for your message.

Just Use the Mind Garden Email

Next >

The “I’ll Send My Own Email to Participants” option allows you to do **two** things:

1. **Create your own message** to participants. You may wish to click “this example of a generic email message” to start your message.

You **must** include the link shown on your screen in your email, since the link shown on the screen above is only an example (<http://transform.mindgarden.com/rsvp/####>). The #### will be numbers unique to your campaign. Make sure to use the link in your own Email tab – the link in the example page is not your link!

The link for your campaign will take your participant to a login screen, where they will enter their email address to confirm their match with your campaign and then will be directed to the assessment.

2. **Send your message with the link at a time of your choosing from your regular email program. YOU MUST REMEMBER TO SEND THE EMAIL – THERE WILL BE NO PROMPT TO DO SO FROM MIND GARDEN'S TRANSFORM™ SYSTEM.**

Once again, it is important to know that with this option the invitation to participate will not be sent automatically when you enter the names and email addresses of participants in the system. You **must** send it yourself from your own email program.

Be sure to import your participants' names and email addresses before you send your email because they need to be in Mind Garden's Transform™ database when they attempt to log in. The order of these steps is essential:

- 1) Click on the button "I'll Send My Own Email to Participants".
- 2) Click **Update**.
- 3) Enter your participant names and email addresses in the Participants tab.
- 4) Create your own email including the login link and response deadline and send it to your participants from your own email program.

ADDING PARTICIPANTS

The screenshot shows a web interface for adding participants to a campaign. At the top, it says 'Apr 2014 for MLQ - Top management' and has a 'Return to campaign list' link. Below this are several tabs: 'Campaign Details', 'Response Deadline', 'Email', 'Participants' (which is selected), 'Data Download', and 'Licenses'. A blue box highlights '4 AVAILABLE LICENSE(S)' and explains that 4 licenses are available for use. Below this is a section titled 'ADD PARTICIPANTS' with instructions on how to enter names and email addresses. A text input box contains the example text 'Sample Person sample@mindgarden.com'. At the bottom of the input box is an 'Import' button.

You must have data or report licenses available in order to add participants (the number of available licenses is displayed at the top of this page). You can share licenses for a given instrument among several campaigns. If you need to purchase additional licenses you can do so via www.mindgarden.com.

First, import the participants by entering first and last names and email addresses. We recommend you copy and paste these from your own document into the Import box. The input method is first name, last name, email address – each separated by one space (as shown). Each additional participant should be separated by a new line. When you are finished, click **Import**.

Import names

Here are the name(s) that we found. Make any corrections needed and click the "OK" button to add them to your participant list. Or, you can click "Cancel" to return the text box and edit things there.

Name	Email address
Sample Person	sample@mindgarden.com

OK Cancel

After you click **Import**, a new window will appear. You can make corrections to the names and emails as needed in this window and then click the **OK** button. If you click the **Cancel** button, you will be taken back one step in the process to the Import box with all email addresses and names in it.

Apr 2014 for MLQ - Top management | Return to campaign list

Campaign Details Response Deadline Email **Participants** Data Download Licenses

3 AVAILABLE LICENSE(S)
 You currently have 3 "Multifactor Leadership Questionnaire Self Form with data and scoring only" licenses available in your account. You can use those licenses to add additional participants to this campaign by entering their contact information here. You can purchase additional licenses on the "Licenses" tab if needed.

CURRENT PARTICIPANTS

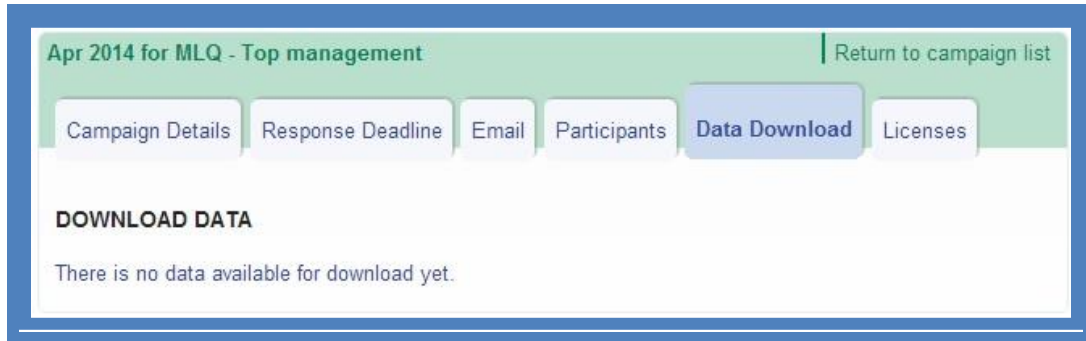
Email address	Name (click to visit participant's page)	
sample@mindgarden.com Self rating: Pending	Sample Person	Edit Resend

When you have successfully entered your participants, the page will appear as above. If you have several participants, you may have to scroll down to see the complete list. The participant(s) will have a completion status that either says "**Pending**" (meaning the participant has not completed the assessment) or "**Complete**."

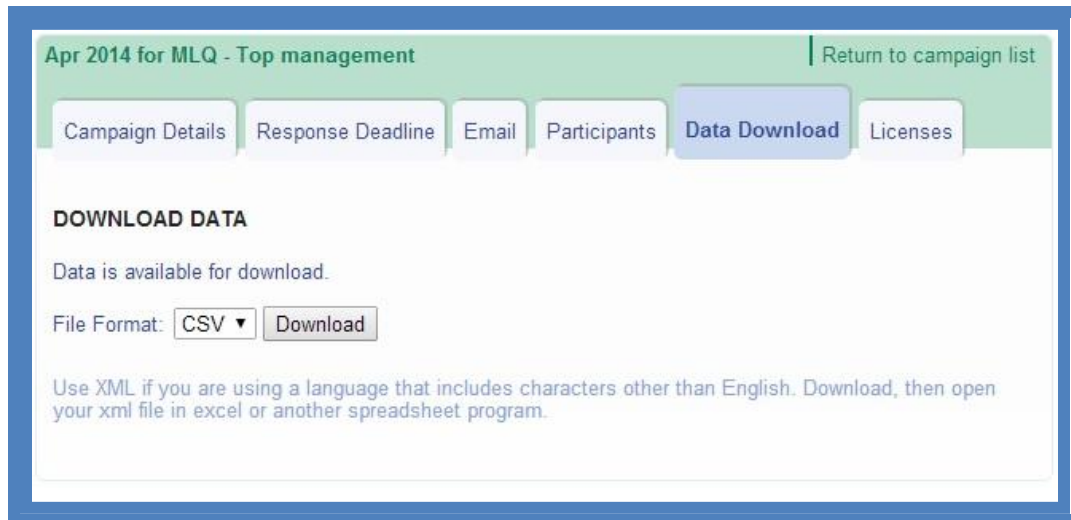
This page shows the **Resend** feature in the participant row, which allows you to send reminder emails to your participants who have not completed their rating. Note that if you have selected the "I'll Send My Own Email to Participants" option, the **Resend** button will not appear - you must send you own reminder emails.

Note: You cannot edit a participant's name or email address once it has been imported into the Transform™ system. For any changes, [contact Mind Garden](#).

DATA DOWNLOAD



Data Download is where you can access your data once it becomes available. If you see the message “There is no data available for download yet,” none of your participants have completed the assessment. Once a participant has completed the assessment, this page will change to the below screen:



You have two options for the download format: CSV and XML. CSV is compatible with many English language statistics programs including Microsoft Excel and SPSS. If you are using a language that includes characters other than English, download the XML file. Click **Download** to download your data in your chosen file format.

Note: XML will not automatically open with Microsoft Excel. If you wish to open an XML file with Microsoft Excel, first open a blank Excel spreadsheet and then go to File → Open. Find and select your XML file in the window provided and click **Open** to access the XML file via Excel.

The data file containing all data collected for the campaign is recreated each time you download data. The file includes one line of data for each participant who completed the survey. The data includes raw data and raw scale scores.

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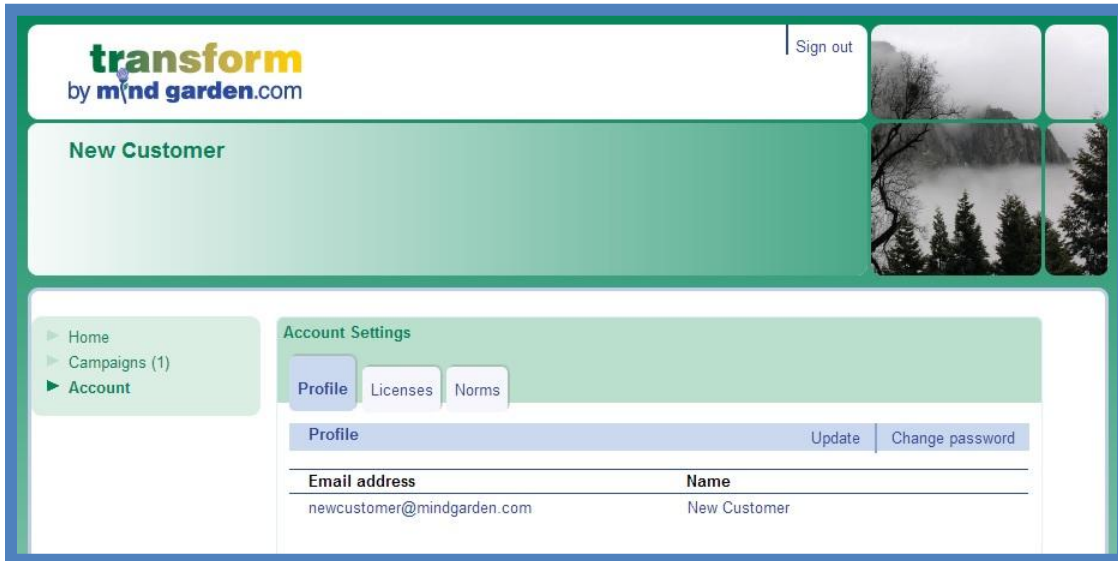
LICENSES

The screenshot shows a web interface for a campaign titled "Apr 2014 for MLQ - Top management". At the top right, there is a link "Return to campaign list". Below this is a navigation bar with tabs: "Campaign Details", "Response Deadline", "Email", "Participants", "Data Download", and "Licenses". The "Licenses" tab is selected and highlighted in blue. Below the navigation bar, a light blue box contains the text: "0 AVAILABLE LICENSE(S) You currently have 0 'Multifactor Leadership Questionnaire Self Form with data and scoring only' licenses available in your account." Below this box, the heading "PURCHASE ADDITIONAL LICENSES" is followed by the text: "To add new licenses to your account, thus increasing the number of slots you have available to add participants, please purchase on [www.mindgarden.com](\"http://www.mindgarden.com\") or contact Mind Garden."

This tab instructs you on how to purchase additional licenses if you currently have none available for use.

ACCOUNT SETTINGS

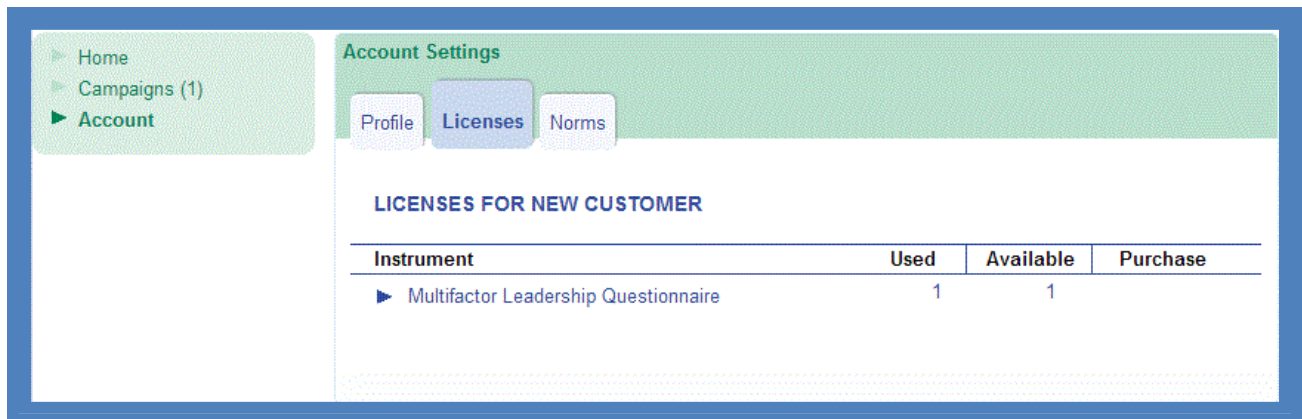
To access account settings and licenses available, click the **Account** option in the left menu of your Transform™ Portfolio. In the **Profile** tab, click **Update** to change your name and/or email address. Click **Change password** to create a new password for this account.



The screenshot shows the 'transform by mind garden.com' interface. At the top right, there is a 'Sign out' link. Below the logo, it says 'New Customer'. On the left, a navigation menu includes 'Home', 'Campaigns (1)', and 'Account'. The main content area is titled 'Account Settings' and has three tabs: 'Profile', 'Licenses', and 'Norms'. The 'Profile' tab is active, showing a table with columns for 'Email address' and 'Name'. Below the table are 'Update' and 'Change password' buttons.

Email address	Name
newcustomer@mindgarden.com	New Customer

The **Licenses** tab lists your license purchase/use history. The final tab, **Norms**, lists all the norms associated with this account and to which campaigns they are attached. [Contact Mind Garden](#) to add Norms.



The screenshot shows the 'Account Settings' page with the 'Licenses' tab selected. The page title is 'LICENSES FOR NEW CUSTOMER'. Below the title is a table with columns for 'Instrument', 'Used', 'Available', and 'Purchase'.

Instrument	Used	Available	Purchase
▶ Multifactor Leadership Questionnaire	1	1	

SPECIAL SITUATIONS

I want to select the “Just Use the Mind Garden Email” option, but I want to enter my participant names without having the automatic email invitation go out immediately upon entering the names.

Steps:

1. After creating a campaign and setting your response deadlines, click on the Email tab. Select the option “I’ll Send My Own Email to Participants” and click **Next/Update**.
2. Under the Participants tab, paste your participant’s email addresses and names into the import box and click **Import**. After verifying that they are all correct, click **OK**.
3. You have now entered your Participant names without triggering the instantaneous sending of the invitational email.
4. When you want Mind Garden to send the invitational emails, go back into the Campaign and click on the Email tab. Change the option to “Just use the Mind Garden email” and click **Update**.
5. Go to the Participants tab and next to each participant’s name, click the **Resend** button. This will send the invitational email. You may also [contact Mind Garden](#) to set up a “Resend All” option.

I want to input all data myself.

1. After creating a campaign and bypassing the response deadline, click on the Email tab. Select the option “I’ll Send My Own Email to Participants” and click **Next/Update**. Now no emails will be sent from Transform™ to your participants.
2. Under the Participants tab, input your participants’ email addresses and names into the Import box and click **Import**. After verifying that they are all correct, click **OK**. If you do not have names and/or email addresses for your participants, you must create your own (e.g., Patient 1 one@patient.com).
3. Scroll down to **Current Participants** on the Participants tab and click the name (in green) of one of your participants. The self-assessment for this participant will appear in a new tab. Enter the data by clicking through the assessment (or use the Tab and Arrow keys for quick input).

KEY TERMS

Administrator: The person(s) in charge of setting up the assessment(s), sending emails, and importing participants' names and email addresses into the Transform™ system. An administrator can also be a participant. The administrator's name appears in invitational emails to participants. If any issues arise, the administrator should contact Mind Garden.

Assessment: The questionnaire, survey, or inventory that is completed by the participant.

Basic Campaign: A campaign that is using a non-multi-rater instrument. Most Mind Garden instruments are "self rating only", meaning that one person assesses themselves or an un-named individual.

Campaign: At its simplest, a campaign is a grouping of participants. You can have as many or as few participants in a campaign as you wish. You can create as many campaigns as you need at absolutely no charge! We recommend you treat campaigns as an organization tool. Try breaking up your participants up by Job Title (e.g., "Top management" or "Supervisors") or by Work Group (e.g., "Store #855" or "Product Development Team"). This will allow you to visualize your different groups more clearly and help you analyze large quantities of data. You can easily combine data from multiple campaigns outside of our system after download.

Instrument: The product as a whole (e.g., *Multifactor Leadership Questionnaire 360*, *Coopersmith Self-Esteem Inventory*, *Areas of Worklife Survey*), including manuals, workbooks, and other accessory documents.

License: Each license gives permission to administer the specified assessment one time (e.g. if you want to use the *Maslach Burnout Inventory* (MBI) to assess 20 individuals, you must purchase at least 20 MBI licenses). You can purchase licenses for Mind Garden products on our website (www.mindgarden.com).

Multi-rater: A number of Mind Garden instruments are multi-rater, or self/observer assessments, meaning that several people rate a specified, target individual (e.g., "Becky B. Boss listens to me" versus "My boss listens to me"). A multi-rater campaign is a campaign using a multi-rater instrument.

Participant: A person who completes an assessment. In a multi-rater instrument, the terms "Leader" (you are being rated by others) and "Rater" (you are rating someone) are often used instead of "participant" for those who are completing an assessment.

Report: A PDF document summarizing personal and/or group scores on the assessment. The report often includes strategies for developing desired behaviors. Reports must be purchased and are available to participants at the administrator's discretion.

CONTACT MIND GARDEN

If you have additional questions, please look through our Frequently Asked Questions or “FAQs” at www.mindgarden.com/content/23-faq. You may also contact Mind Garden online, by mail, telephone, or fax.

Online: www.mindgarden.com/contact-us

By mail:

Mind Garden, Inc.
855 Oak Grove Ave., Suite 215
Menlo Park, CA 94025 USA

Telephone: (650) 322-6300

Mind Garden employees are generally available by phone Monday - Friday during normal business hours (9am – 4pm, Pacific Time), excluding major holidays recognized by the United States.

Fax: (650) 322-6398

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