TUTORIAL - USING MIND GARDEN'S TRANSFORM™ SYSTEM

For Participants, Single Self-Assessments, and Document Retrieval

Contents

INTRODUCTION

Welcome to Transform™ - Mind Garden's system for conducting surveys and assessments.

This tutorial provides step-by-step processes in accessing and using Mind Garden's Transform™ system. This tutorial will be most beneficial if you wish to retrieve a Mind Garden document, access a report, or set up a single assessment for yourself, and if you are a participant who wishes to complete an assessment. **If you are an administrator ready to set up a multi-rater campaign or a basic campaign for multiple participants, please reference the other, more specific tutorials 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!

"A tree is known by its fruit; a man by his deeds. A good deed is never lost; he who sows courtesy reaps friendship, and he who plants kindness gathers love."

- Saint Basil (329-379)

Bishop of Caesarea

HOW TO LOGIN

There are three ways to access the Transform™ system.

1. Administrators and Returning Customers

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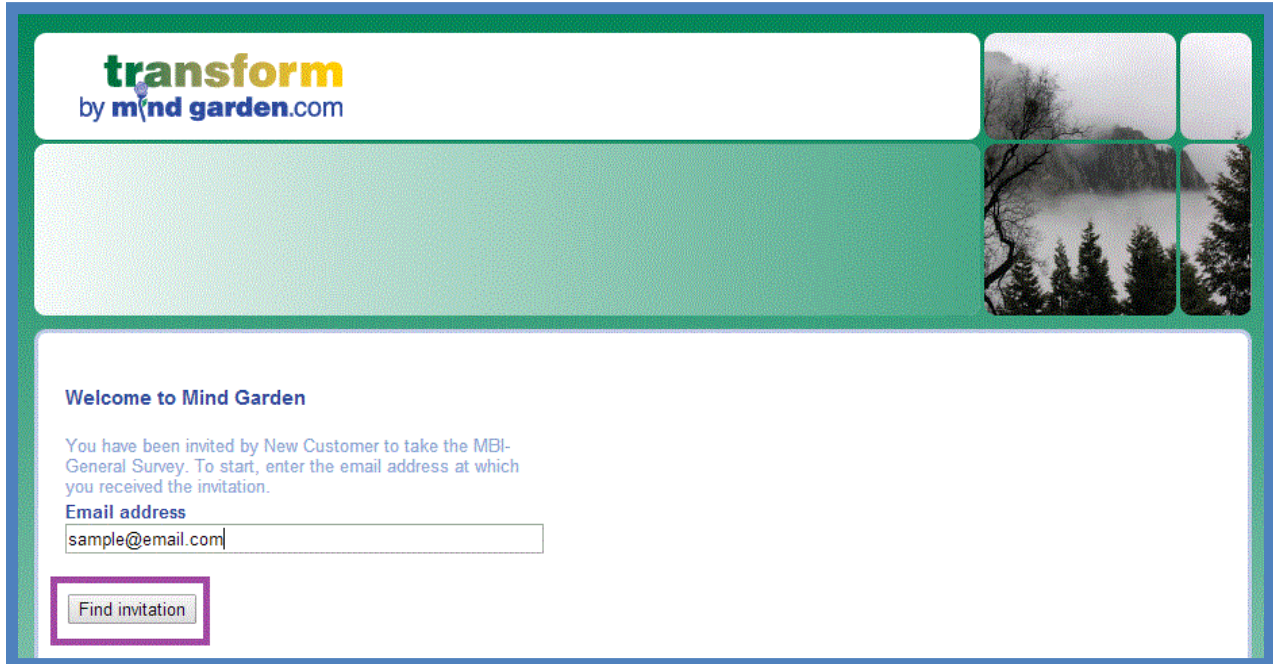

New users: Use the **green box** to enter your email address and create a password. Check the box below to agree to Mind Garden's terms of service, and then click **Create**.

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

Successful login will take you to your Transform™ Portfolio home page or to the assessment page.
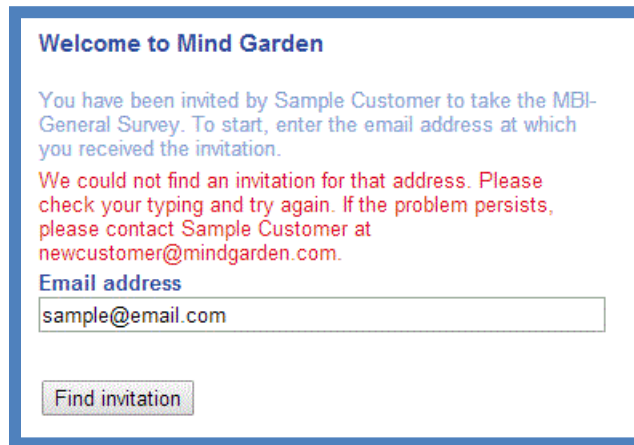
2. Participants with Login Link

If you received an email invitation to participate in a Mind Garden survey, click on the link to begin your login process. Enter your email address in the window provided and click **Find invitation**.
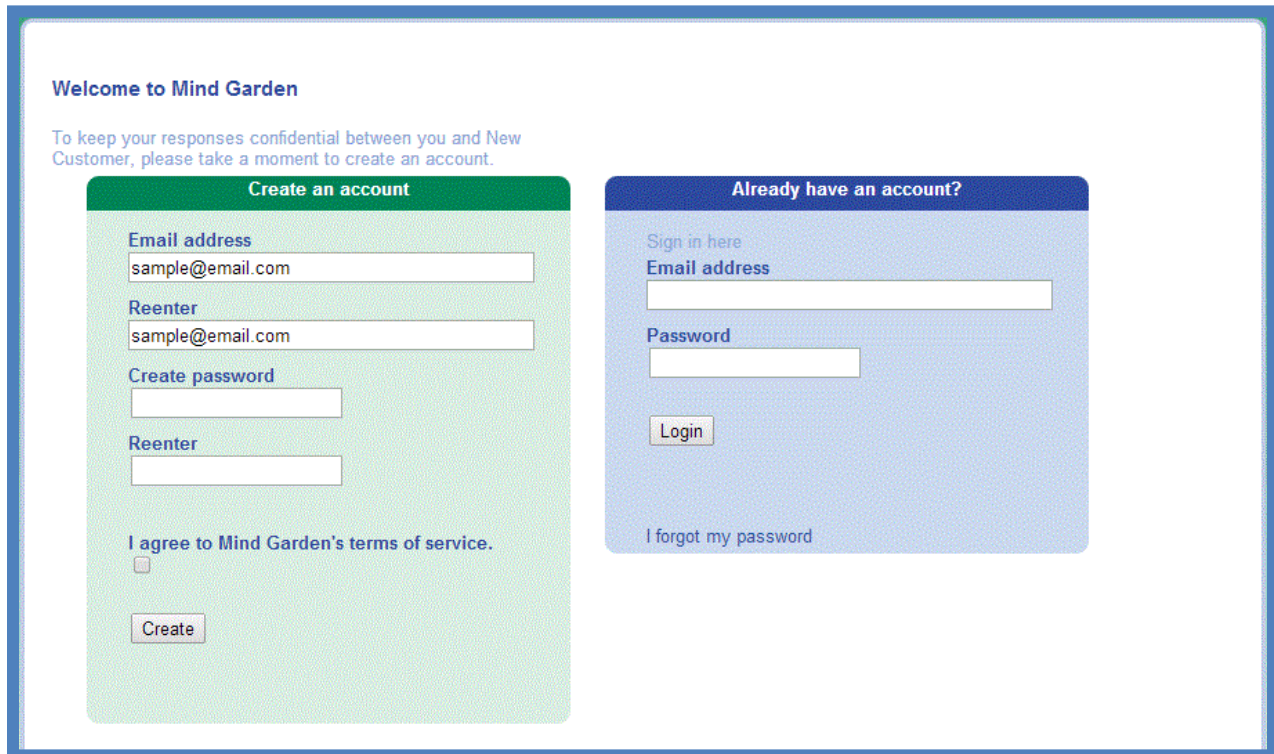

If the email address you entered is not associated with the survey associated with the link, you will see this error message:

If an invitation is found for your email address, a **Create an account** section will appear with your email address pre-loaded. Enter your password of choice (case-sensitive), check the box confirming you agree to Mind Garden's terms of service (www.mindgarden.com/content/3-terms-of-service), and click **Create**. This action will take you directly to your assessment. Read the directions and complete the assessment.

Welcome to Mind Garden

To keep your responses confidential between you and New Customer, please take a moment to create an account.

Create an account	Already have an account?
Email address	Sign in here
sample@email.com	**Email address**
Reenter	
sample@email.com	**Password**
Create password	
Reenter	Login
I agree to Mind Garden's terms of service.	
☐	I forgot my password
Create	

## 3. Participants with "No Login Link"

If you received an email invitation to participate in a Mind Garden survey (that was a "no login" link), you will not be required to create an account. Simply click on the link and the assessment will open in a new window. Read the directions and complete the assessment.

4. Raters

If you received an email invitation from Mind Garden to assess a specific person, click on the link in the email and the assessment will open in a new window. You do not login. Read the directions and complete the assessment.

DOCUMENT RETRIEVAL

To retrieve documents, log in to your Mind Garden account. All new available documents will be listed in **Updates** on your Transform™ Portfolio home page. You can also access all documents under **My Documents** in the left menu. The documents will be listed under their product code. Manuals end in "-S", Bulk permissions (reproduction licenses) end in "-B", Workbooks end in "-W", and Permission letters end in "-E". Click on the blue product code to open the PDF document in a new tab. You can view the document and save a copy. Remember: your document purchase comes with permission to reproduce **a limited number of copies** (detailed at beginning of document).
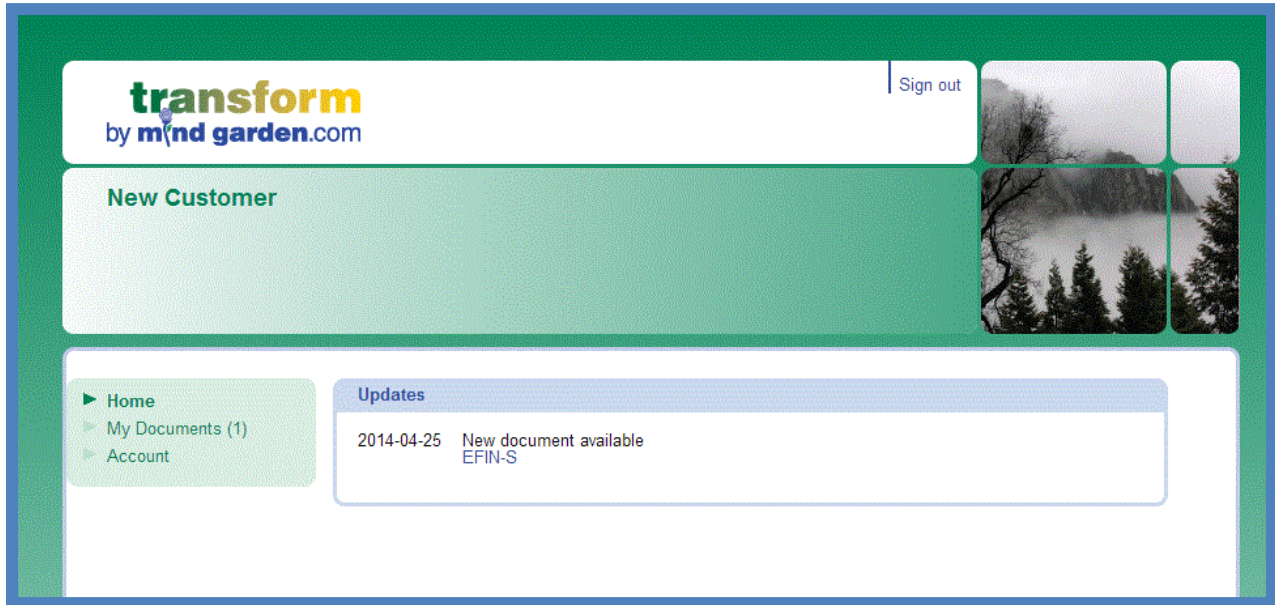
COMPLETING AN ASSESSMENT

Once you login to Transform™, you will be taken to one of three places. Most likely, you will be taken directly to your assessment. Simply follow the directions given and complete your assessment. If you are participating in a campaign where you must submit your own raters, you will be directed to your **Participant Page** (see page 13). If you have more than one assessment to complete, you will be taken to your Transform™ Portfolio home page:
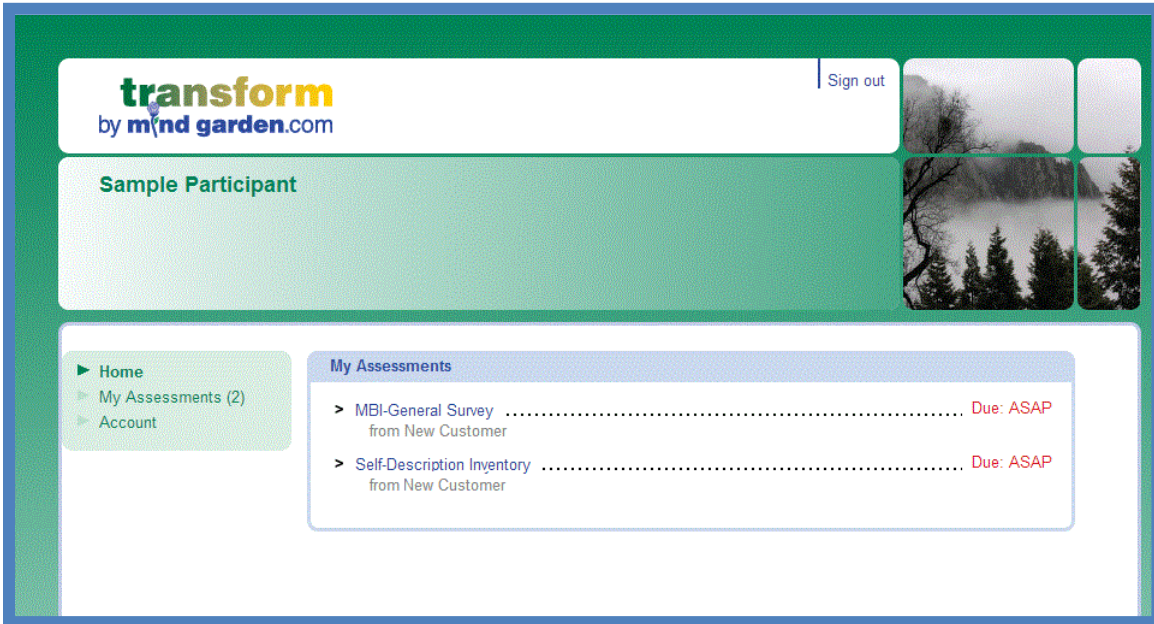

On your home page, all pending assessments will be listed. All assessments are also listed under **My Assessments** in the left menu or **My Ratings of Others** (if applicable). To access an assessment, click the instrument title (in blue). A new tab will open with the assessment – follow the directions given and complete the assessment.

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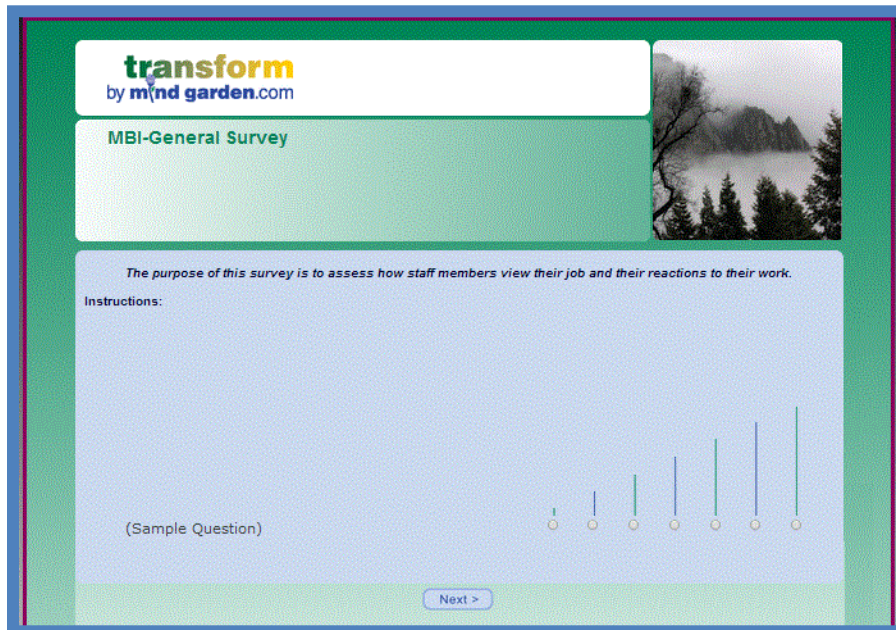
HOW DO I SET UP AN ASSESSMENT FOR MYSELF?

First you will need to purchase Transform™ Survey Hosting for the instrument you wish to use. You can do this either through www.mindgarden.com or by contacting Mind Garden.

With Transform™ Survey Hosting purchased, go to your Transform™ Portfolio and click on **Campaigns** in the left menu. This action will take you to the Campaigns page. Your instrument licenses will be listed under the section "Add a campaign using". Select the applicable instrument and click **Add a campaign**.
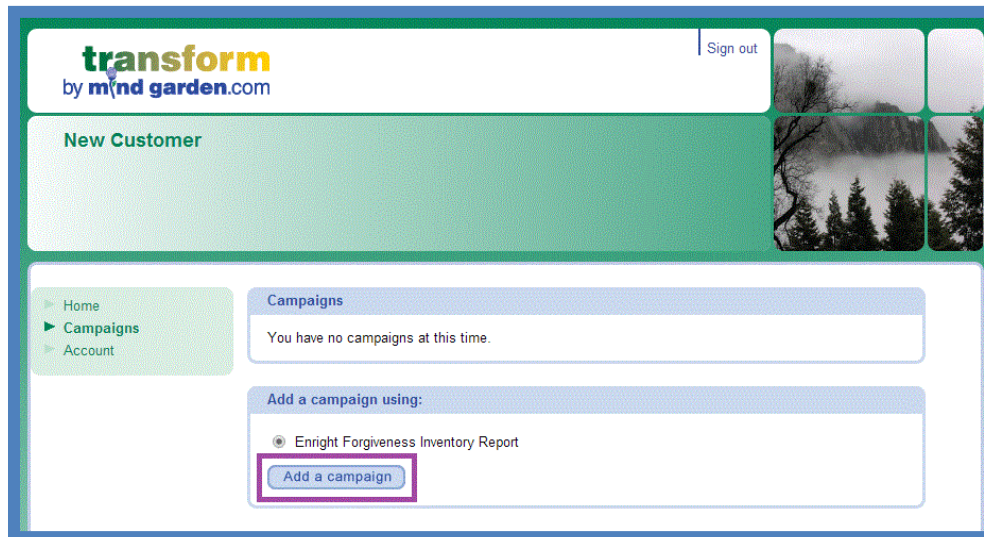
You will be directed to your campaign page where you will be instructed to set your campaign options. The **Campaign Details** tab allows you to name your campaign: use the default name or create your own (such as "Forgiveness April 28, 2014"). Click **Next** to continue. Note: if the selected assessment is available in multiple languages, an additional **Default Language** drop-down menu appears.
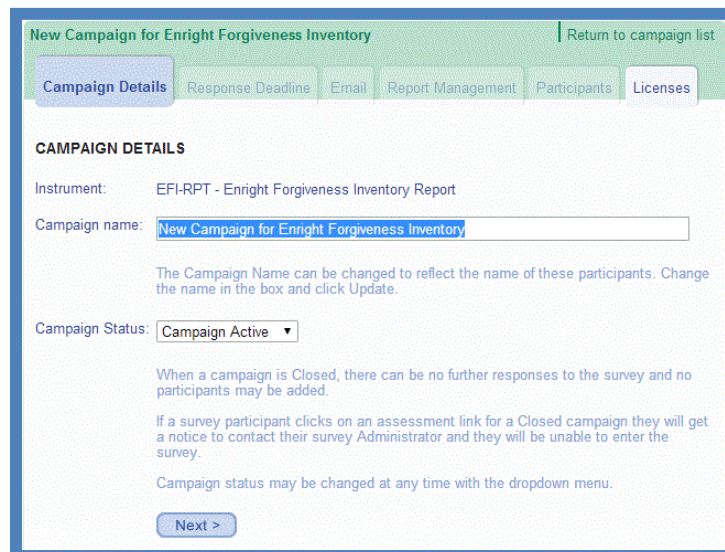
The **Response Deadline** tab and the Email tab are not needed for you own self-assessment. Click **Next** on each tab to continue.
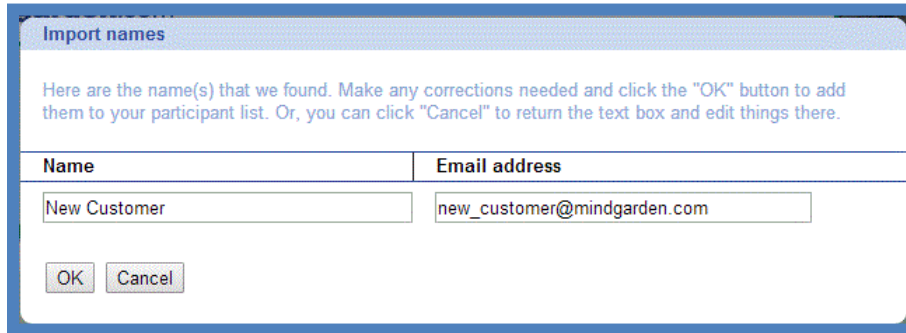

The **Report Management** tab is where to access your report after completing your assessment. For now, simply click **Next**.

This action will take you to the **Participants** tab. In the box shown below, type in your first name, last name, and email address – each separated by one space (as shown). Then click **Import**.

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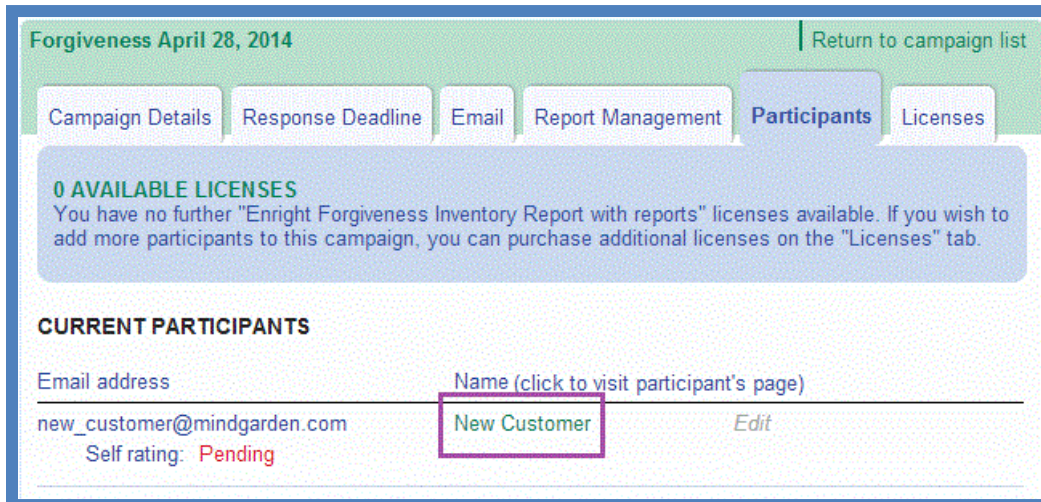
After clicking **Import**, a window will appear for you to check that your name and email was imported correctly. You can edit directly within this window if needed. Click **OK** when finished.

Your name is now listed under **Current Participants** in the Participants tab. To access your assessment, simply click on your **name** (in green) under Current Participants. This action will take you directly to the assessment page. Read the directions and complete your assessment.

ACCESSING A REPORT

If you have a report available, all unviewed reports will be listed on your Transform™ Portfolio under **Updates** and a new option called "**My Reports**" will appear in the left menu. To view a report, click on the blue report title in the Updates box (or in the **My Reports** box if you click on the My Reports menu option).

This action will open a new tab in which the Transform™ report generator will create your report. It may take several seconds to a few minutes to generate the report. Once your report is generated, you may save or print your report to view later or you may regenerate your report at any time.

PARTICIPANT'S PAGE (multi-rater assessments only)

The Participant's Page is what you will see when you follow the assessment link from the invitation email sent by "invite@mindgarden.com" or by your administrator. You can add your raters, access your self-assessment, view rater assessment completion status, and verify your personal information on this page.

Step 1 – Identify and enter your raters

The first step in this section is to add your raters' names and emails. The input method for raters is: first name, last name, email address – each separated by one space (as shown). Make sure to input each rater on a new line. When all your raters have been added, click **Import**.

After you click Import, a small window will appear. Here, you can confirm or edit the names and email addresses of the raters you added. You may also be required to select the relationship of each rater to you (not all instruments have rater levels). When you are finished, click **OK**. The raters' names will appear under **Step 3**.

Step 2 – Complete your self rating

The second step on the Participant's Page is to complete your self rating. The survey administrator's deadline for your assessment is listed below.

Step 3 – Check who has or has not yet responded

This section displays all the raters you have added and whether they have completed their assessment of you. Each rater row will display "**Pending**" if the rater has not completed the assessment or "**Complete**" if the rater has completed the assessment. The survey administrator's deadline for your raters' assessments is listed below. As long as the Rater has not completed the survey, you may also **Edit** the raters' names, email addresses, and relationship or resend the assessment invitation by clicking **Resend**.

Step 4 – Verify your personal information

In this fourth step, you can review your name and email address as entered by the survey administrator. For any changes, the survey administrator must contact Mind Garden.

Step 4 - Verify your personal information	
Email address	**Name**
sample@mindgarden.com	Sample Person

MY ACCOUNT

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.
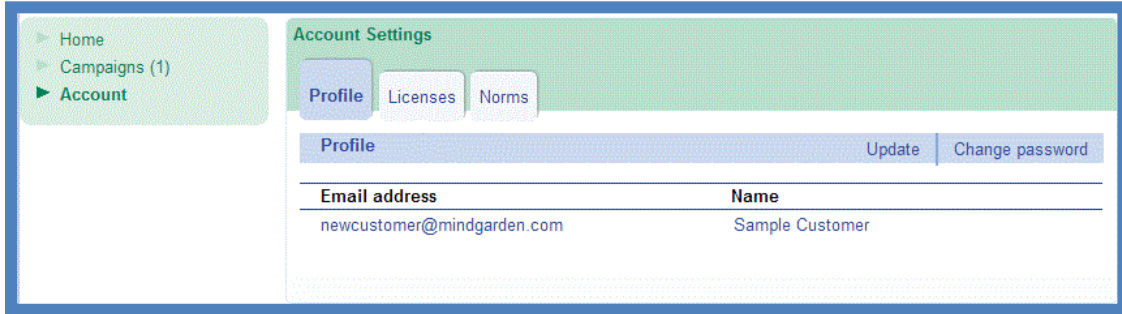
The **Licenses** tab lists your licenses purchase/use history. The final tab, **Norms**, lists all the norms associated with this account and to which campaigns they are attached.
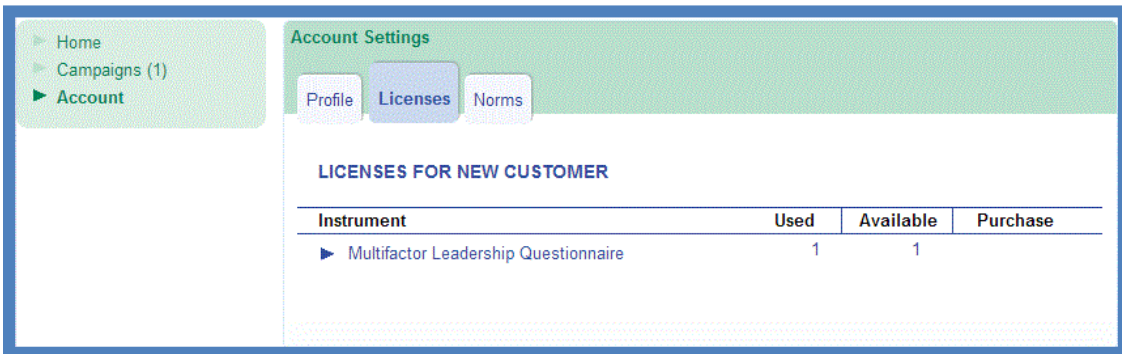
KEY TERMS

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.

Fax: (650) 322-6398

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