CULTURAL INTELLIGENCE CENTER

CQ Portal

Administrator Guide

Introduction

If you are reading this, you are probably about to embark on your journey as a CQ Portal Administrator. As an administrator, you want the learning experience of your participants to go as smoothly as possible, and we are here to help ensure that happens.

This guide is meant to be your reference for the CQ Portal and will provide you with tons of information including a Quick Start Guide, FAQ, and How-To sections, and much more.

Use this document as a starting point if you are a first-time administrator. If you are a returning administrator, use this whenever you need a refresher.

We hope you will find this resource useful and helpful, but we are only a phone call away if you have questions!

Call us at +1 616.855.1737 or email **admin@culturalq.com**. We are standing by and ready to assist you.

Thank you,
Cultural Intelligence Center

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Anything outlined in this box is an optional feature. To activate this feature please contact us at admin@culturalq.com

Special Tips for navigating the CQ Portal

Watch for video icons throughout.
Clicking the icon will open a video tutorial!

Quick Start

This section of your CQ Portal Administrator Guide includes the crucial steps needed for first time registration and quick assessment administration. For more in-depth information, please continue to additional sections of this guide.

If you have entered into a contract or Service Agreement with us, please contact your account manager for setup assistance.

Step 1

FIRST TIME USERS

- **Click here to register**
- Fill out contact info
- Check "*I would like to create an organization*" box
- Fill in details about your organization
- Select password
- Receive email confirmation
- Confirm account
- **Sign in!**

Step 2

- **You are ready to begin!**
- Click on *CQ Store* to begin shopping
- Choose your product
- Check out and complete purchase
- Click on "Create Program"

Step 3

- **Invite your Participants!**
- On your new program, click on the *Participants* tab
- Click on *Participant Options* and invite your participants!
- Your participants will instantly receive a personalized link to begin their CQ work.

****ALREADY A USER? SKIP STEPS ABOVE AND SIGN IN!**

Congratulations! You have successfully registered your organization. On the first screen, on the left side, you will see a **Navigation Menu** with a list of your Organization(s).

Purchase product

On the bottom of the Navigation menu, you will find the "*CQ Store*" option.

- Click the *CQ Store* button
- Use the dropdown to select whether you want to purchase for yourself or your organization
- Use tabs across the top to view different product categories
- Select your product + click on *More Info* and add Quantity
- Choose Payment Method + Create Purchase
- Click on *Setup* or *Continue Shopping*

Create a Program

After creating your purchase, you will be given the option to Setup a program. After you click on *Setup*, you will be directed to your *Programs* page.

- You must purchase your products **before** creating a program
- After you purchase your products, click on *Create Program*
- Choose the products that you purchased for the program and click on *Setup Program*
- Create a name for your program and click on *Create Program*

Invite Participants

Click on the Program that you created to get started.

- Click on the *Participants* tab and then on the "*Participant Options*" button
- Click on *invite New Participants* and then Copy and paste, or upload participant emails
- Customize email invitation and invite (you can choose to be cc'd on invitation emails)

*These email invitations are sent by cqaccount@culturalq.com, are unique to each individual, and should not be forwarded.

CQ Portal Navigation

Navigation Menu

The *Navigation Menu* on the left of your screen allows you to navigate between your *Dashboard*, your *Organizations*, *Administrator Resources*, and the *CQ Store*.

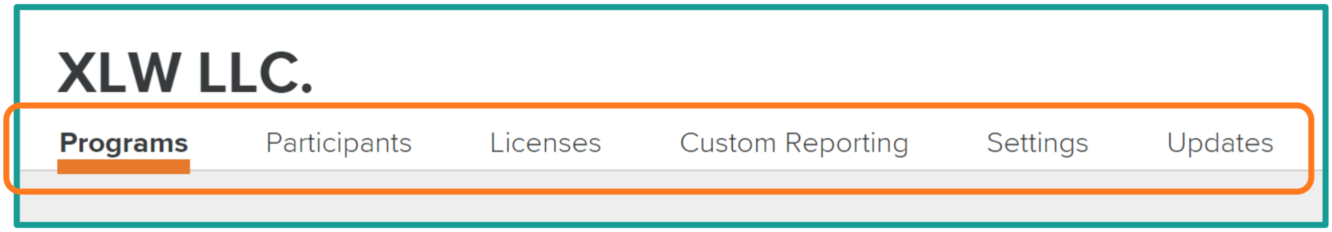
The Navigation Menu includes the following

- *My Dashboard: Where* you can view your personal feedback reports, e-learnings, and assessments.
- *My Resources:* Any resources assigned to you by an administrator.
- *Management*: A list of your organizations that you can manage. Click on your organization to get started!
- *Administrator Resources:* Resources that you can assign to your participants or use as teaching resources.
- *CQ Store*: This page allows you to view all CQ offerings and make purchases.

Click on a specific organization and use the tabs across the top to view/manage your *Programs*, *Participants*, *Custom Reporting* and *Settings*.

Navigate your Organization

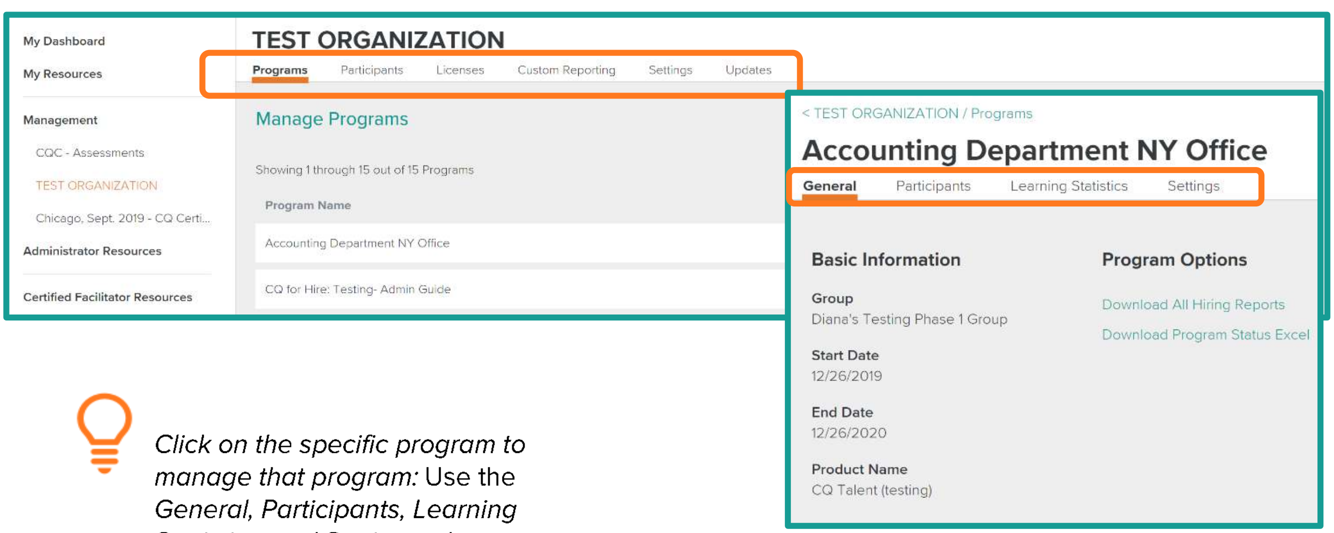
Once you have clicked on the specific organization you would like to manage; you can use the tabs across the top to navigate between your organization's *Programs*, *Participants*, *Custom Reporting,* and *Settings.*



- **Programs**: This page displays the programs in your Organization**.** Click on a specific program to *invite new participants*, *download reports*, view specific participant information, *Learning Statistics*, and *Program Settings.*
- **Participants**: This page displays all participants and their contact and program information.
- **Custom Reporting:** *This is an optional feature, that can be activated by contacting us at [admin@culturalq.com/](mailto:admin@culturalq.com). This feature allows you to create combined reports and tag participants, programs, and groups. Learn more [here](#).
- **Settings**: You can edit your organization name and address on this page. You can also invite or delete organization administrators.
- **Updates**: This page will provide you with product and portal updates. Learn about new CQ offerings, and releases by clicking on this tab.

Navigate your Programs Page

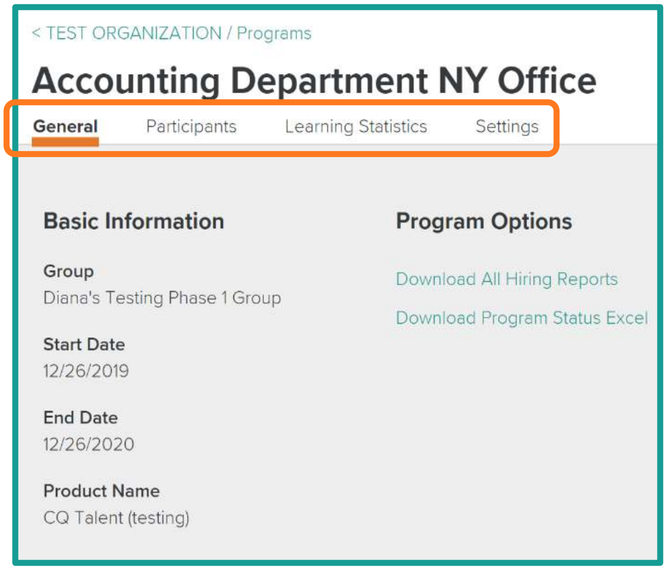
On your *Programs* page, you will see a list of your Programs. Click on a specific program and use the tabs across the top to manage that program.



Click on the specific program to manage that program: Use the *General, Participants, Learning Statistics, and Settings* tabs across the top.

➢ Breakdown of your program's tabs: *General*, *Participants*, *Learning Statistics*, and *Settings.*

General: View user information and program information.
Participants: Assign new assessments to participants, view currently assigned assessments, and download feedback reports.
Learning Statistics: If you assigned e-learning courses to your participants, this tab is where you can check their progress. Check how many modules have been completed.
Settings: Click on this tab to change program settings, add program administrators, change program language.

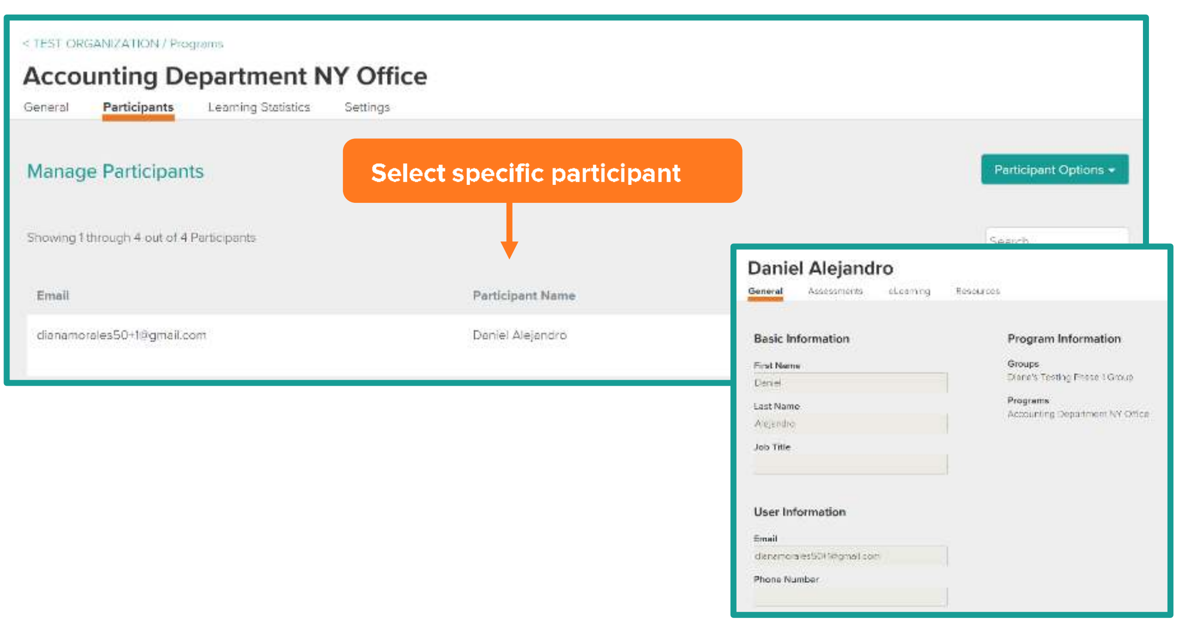


➢ Click on ***General*** to:

- Download Group Report *(if applicable)*, Download All Feedback Reports, Program Status Excel, and a bulk batch of feedback reports
- Download participant status report *(a comprehensive list of assessments completion status)*
- Activate T2 assessment *(if applicable)*

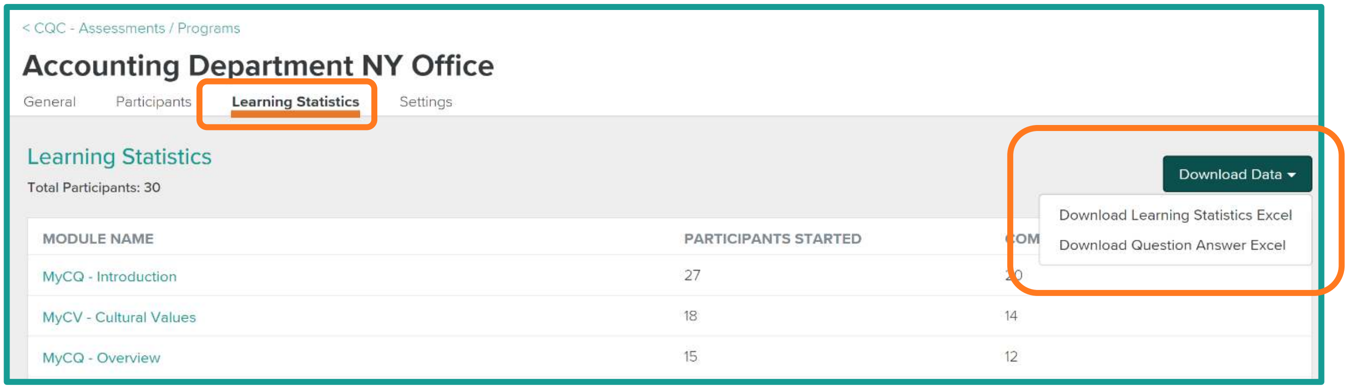
➢ Click on **Participants** to:

- View list of participants
- Click on ***Participant Options*** to *Invite New Participants* or *Resend invitations*
- Click on a specific participant and use tabs across the top to view general information about assessments, e-Learnings and resources assigned to that participant.



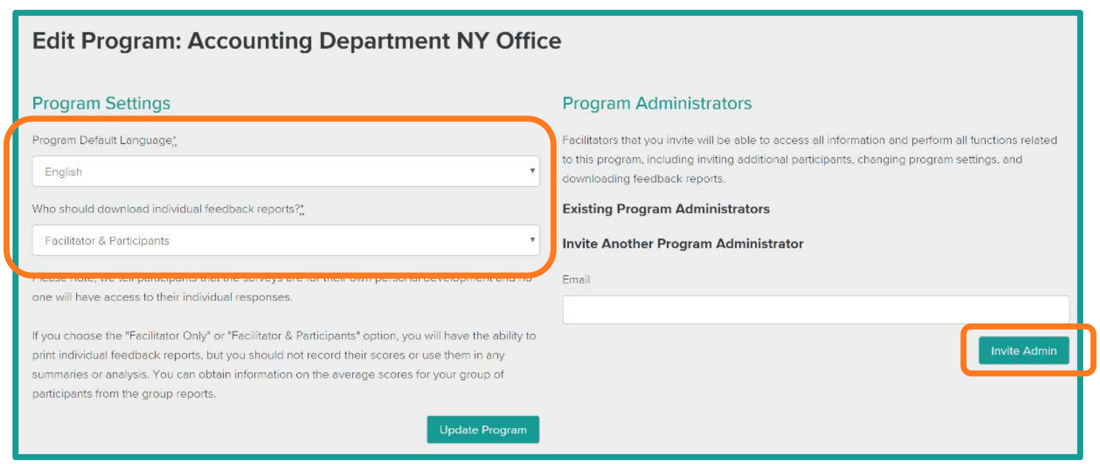
➢ <u>Click *on **Learning Statistics*** to:</u>

- View E-Learning statistics if your products include E-Learning courses.
- Click on *Download Data and then on Download Learning Statistics Excel* or on the *Download Question Answer Excel* button to export learning statistics.



➢ <u>Click *on **Settings** to:*</u>

- Add Program Administrators
    - *Program administrators have broad authority over the program(s) that they manage. They do not have access to other groups or your overall organization.*
- Program Default Language: Change the language of your assessments. Languages offered in Spanish, English, Japanese, Simplified Chinese, Portuguese, and Italian.
- Change who can download individual feedback reports (Facilitator and/or Participant).

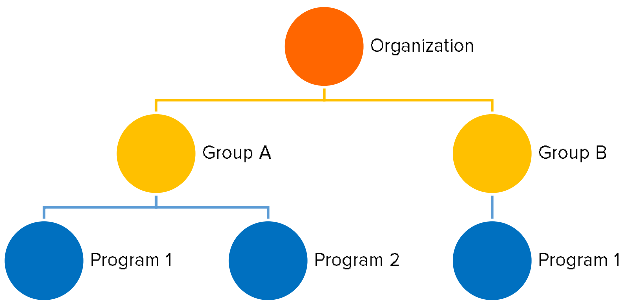


How to Manage your Groups

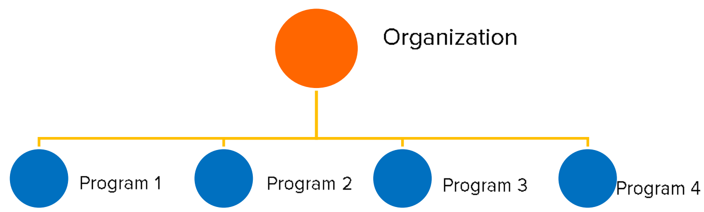
The Groups feature is an optional feature that is typically used by organizations and institutions who want to organize their program and participant management at a more granular level.

The Groups feature allows you to organize your programs in separate buckets. *See chart below for differences between our standard portal layout, and our optional Group feature.*

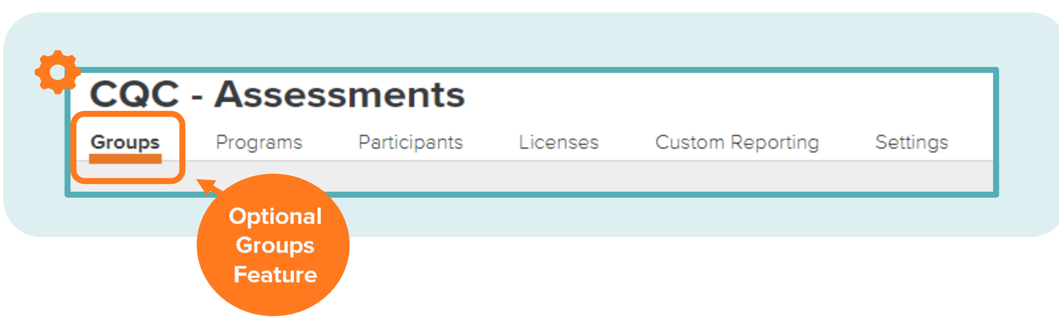
***Optional Groups Feature**



Standard Portal Layout



Instead of only having *Programs* under your organization, you also have *Groups* that will allow you to store your programs separately. If you are interested in activating the *Groups* feature, please contact us at admin@culturalq.com.

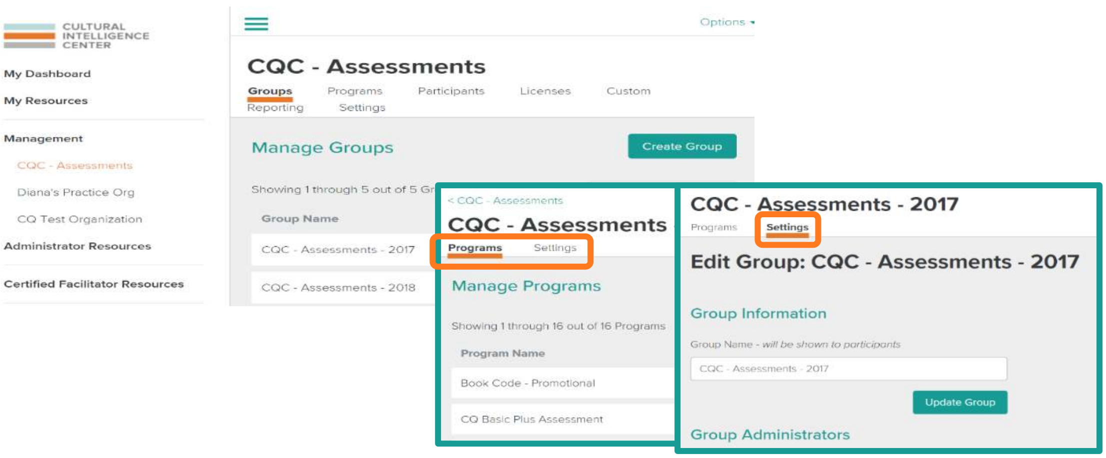


If you are already using this feature, learn more about how to navigate the *Groups* feature below!

➢ Groups Page

The *Groups* page displays a list of the different groups within your organization and allows you to create new groups. **Groups are like departments within an organization. You can have one or many!**

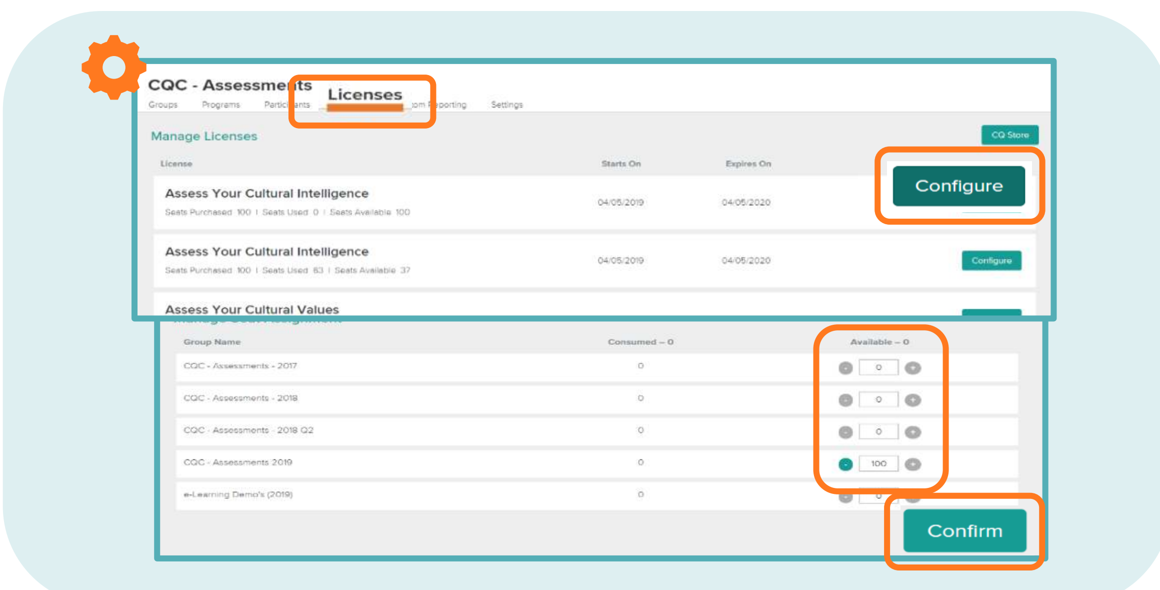
- View a list of your Groups and *Create New Groups*
- View the number of *Programs* and *Participants* in your Groups
- Click on a specific Group to access its *Programs* and Group *Settings*
- The *Programs* tab will list all programs in your Group. Click on the specific *Program* to manage that program
- Click on the *Settings* tab to edit the Group name or [Invite New Group Administrators]



➢ Licenses Page

This page displays a list of all licenses and allows you to purchase products and manage existing licenses (configure). Click on *CQ Store* to purchase additional products. Click on *Configure* to move products from one group to another.

- View a list of your licenses
- Configure your License: Move seats (e.g., assessments, e-Learnings, etc.) from one Group to another
- Click on *Confirm* after adding or removing seats from one Group to another



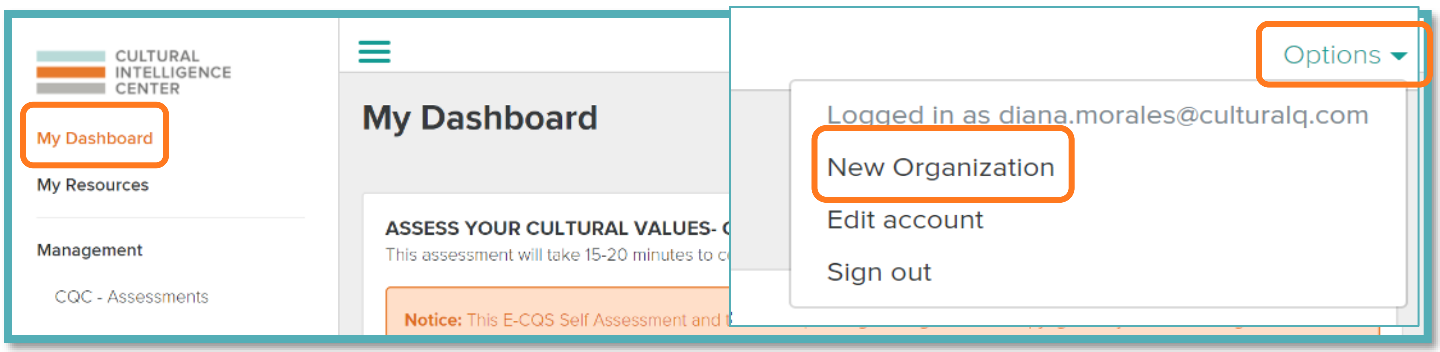
How To's

How to Set up a New Organization

Setting up an organization is the first thing you must do to begin administering the CQ assessment. If you qualify for more than one organization type, you can register multiple organizations.

To set up an organization, click your *Options* menu icon (upper right corner of the screen) and select "*New Organization*." Once you enter your organization's contact details, click on *Create Organization*, to confirm.

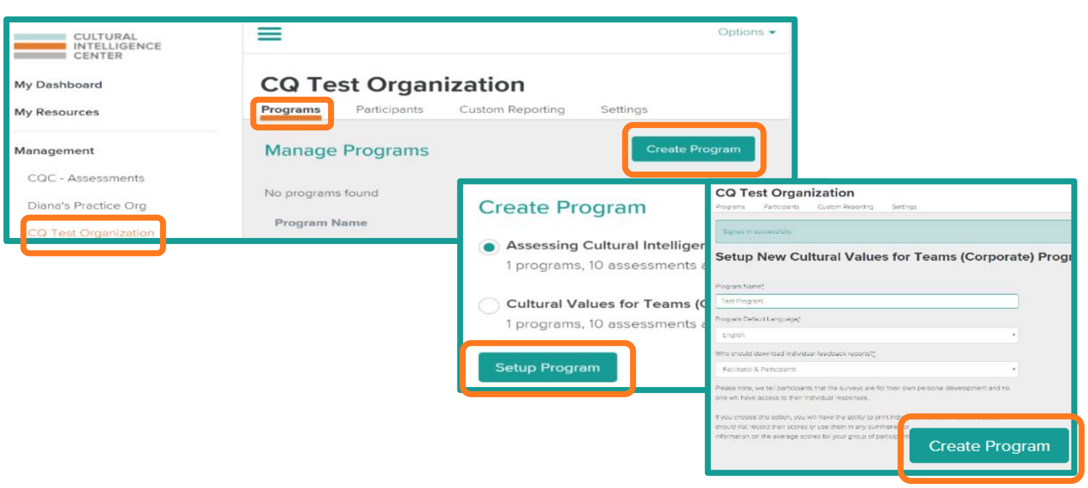
To watch a video on how to setup your organization click here.



How to Setup a Program

- Purchase your products
- Click on the *Programs* tab and then on *Create Program*
- Select the correct products for your program and then click on *Setup Program*
- Give your program a name and adjust your program's settings if needed, and then click on *Create Program*

To watch a video on how to setup your program click here.



How to Invite Participants

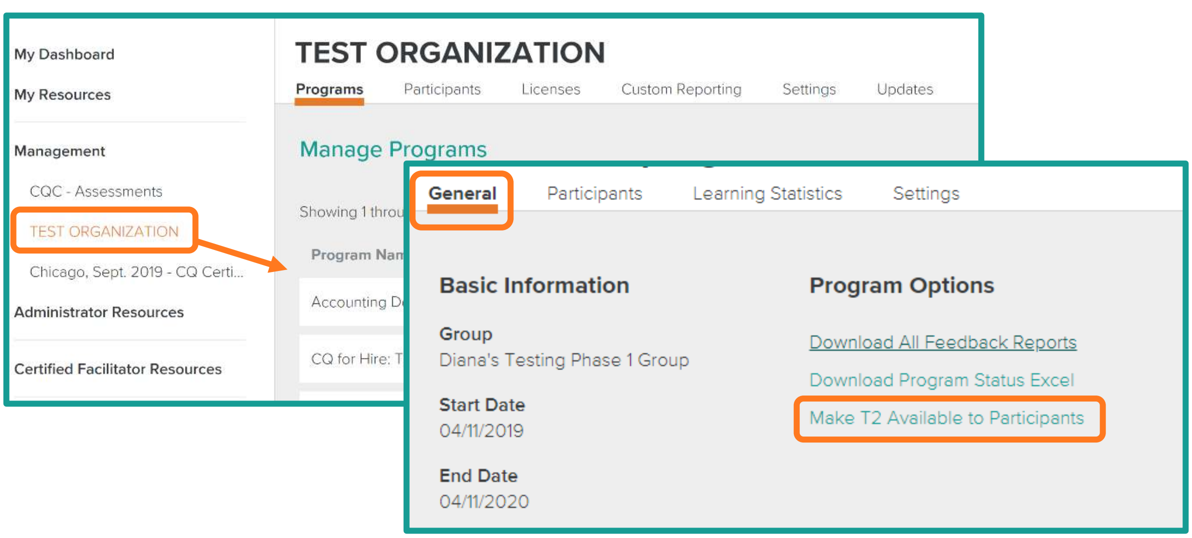
- Click on the *Programs* tab and then select the specific program
- Click on the *Participants* tab and then on *Participant Options*
- Click on *Invite New Participants and then* add participant emails *(copy and paste or upload excel file)*
- Customize invitation email and send (you can choose to be cc'd on invitation emails)
    - *Note: email customization is not stored in the system*
    - *Note: Invitations are sent from cqaccount@culturalq.com and are unique to each participant. Invitation links should not shared between participants.*

To watch a video on how to invite your participants click here.

How to Activate T2

- Click on the *Programs* tab and then select specific program
- On your *Programs* page, under the *General* tab, select *Make T2 Available to Participants*
- Inform your participants that T2 is active and ask them to log back in to complete the assessment

To watch a video on how to activate your T2 assessments click here.



How to Send Group Reminders

- Click on the *Programs* tab and then select the specific program
- Click the *Participants* tab and then on *Participant Options* Button and select "*Resend Invitations.*"
    - This will send an invitation to those who have not yet completed their assessment.

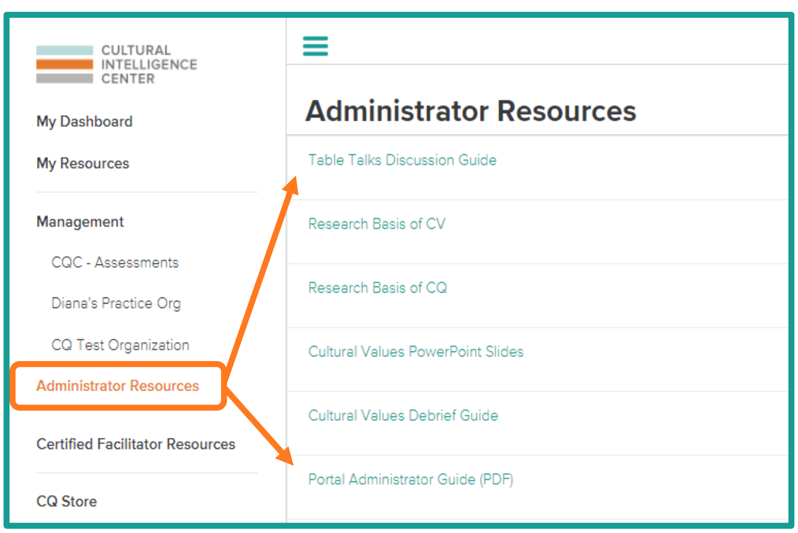
To watch a video on how to send group reminders click here.

How to View Administrator Resources

All additional resources that you purchase for your programs or groups are available on the *Administrator Resources* button on the Navigation Menu.

- Go to your Home page, and click on *Administrator Resources* under your Navigation Menu
- Resources should be used only within the limits of the license and permission to use ends when the license expires.

To watch a video on how to view administrator resources click here.

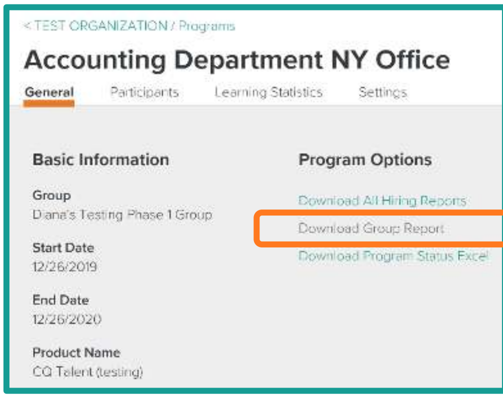


How to Download Reports

➢ **Group Reports *(available only with select products)***

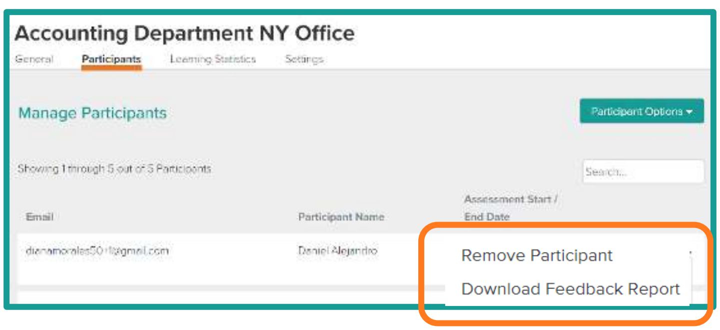
- Click on the *Programs* tab and then select the specific program
- Under the *General* tab, select "*Download Group Report*" *(must have 10 or more completed assessments)*

To watch a video on how to download reports click here.



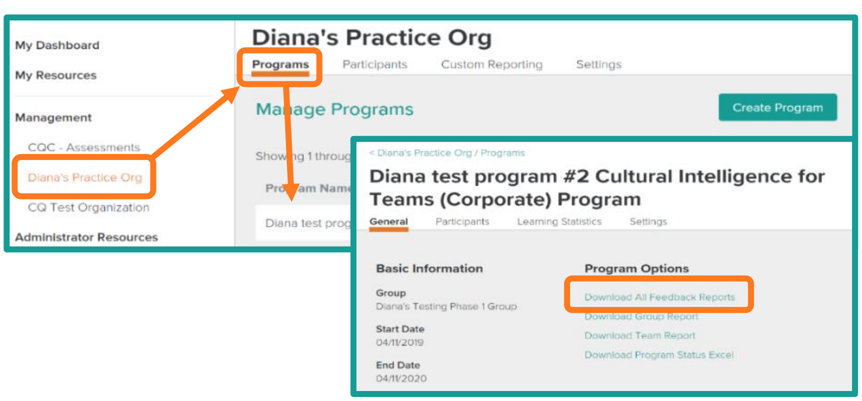
➢ **Individual Feedback Reports**

- Click on the *Programs* tab and then select the specific program
- Under the *Participants* tab, click on the dropdown beside the participant's profile
- Click on *Download Feedback Report*



➢ **Batch of Individual Feedback Reports**

- Click on the *Programs* tab and then select the specific program
- Under the *General* tab, click on *Download All Feedback Reports*

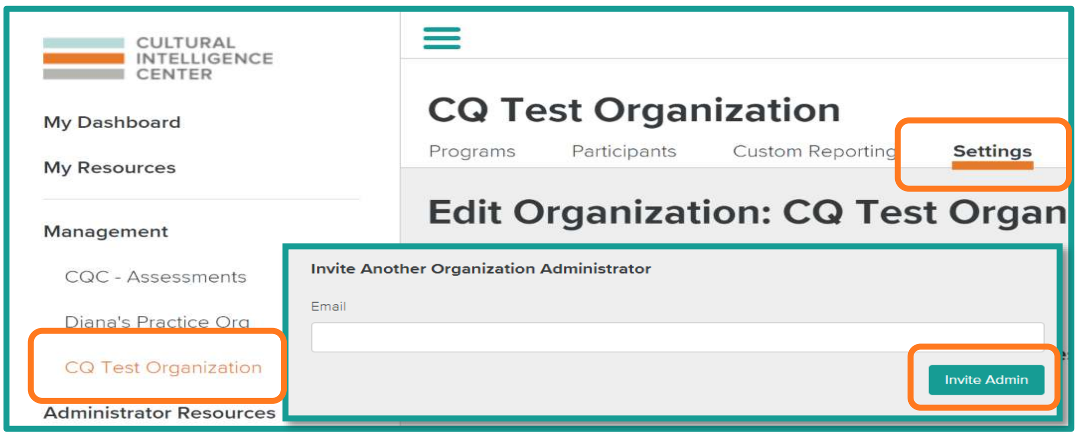


How to Invite Other Administrators

To watch a video on how to invite other administrators [click here](#).

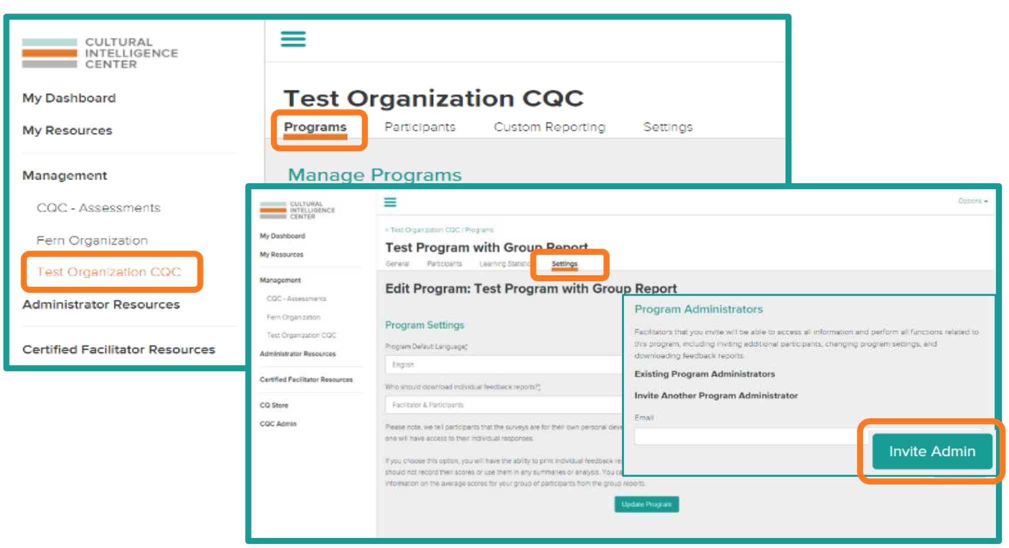
➢ **Inviting an <u>Organization</u> Administrator**

- Select specific organization from the *Navigation Menu*
- Click on *Settings* and scroll to the bottom of the screen, and you will see a section to add an administrator email
  - Organization Administrators have broad authority over the entire organization, all groups within the organization, and all programs within the organization.
  - Organization administrators can add and remove any other administrator



➢ **Inviting a <u>Program</u> Administrator**

- Click on the *Programs* tab and then select the specific program
- Click the *Settings* tab, and you will see a section to add an administrator email. Click on *Invite Admin* to send an invitation out
  - *Program administrators have authority over only the program(s) they manage.*
  - *Program administrators can add and remove other program administrators and participants.*

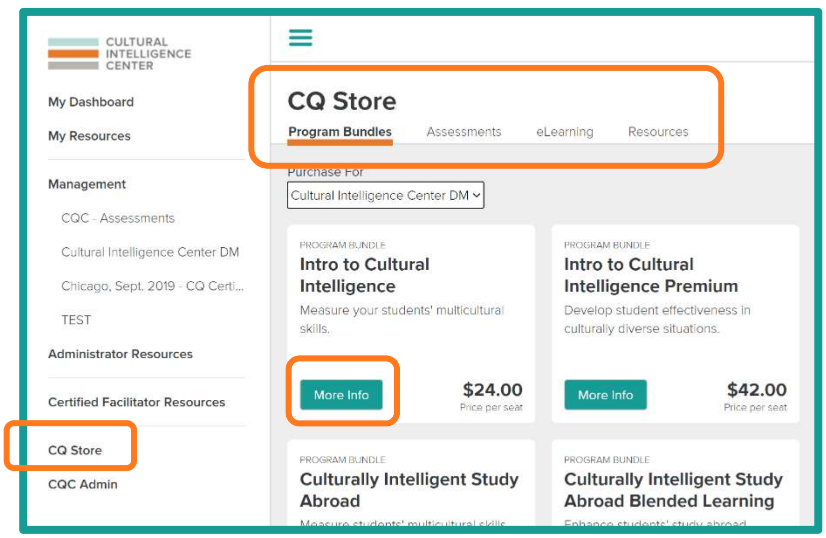


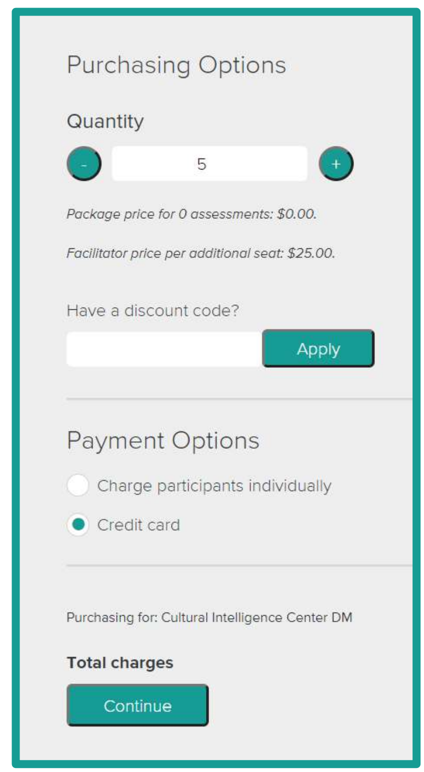
How to Purchase Products

To watch a video on how to purchase products click here.

➢ **Purchase Products to Create New Program**

- Click the *CQ Store* button
- Use the dropdown to select whether you want to purchase for yourself or your organization
- Use tabs across the top to view different product categories (e.g., Assessments, Bundles, e-Learning, Resources)
- Select your product and click on *More Info* and then select your quantity
- Choose your payment method and complete your purchase
- Click on *Setup* to create your new program!

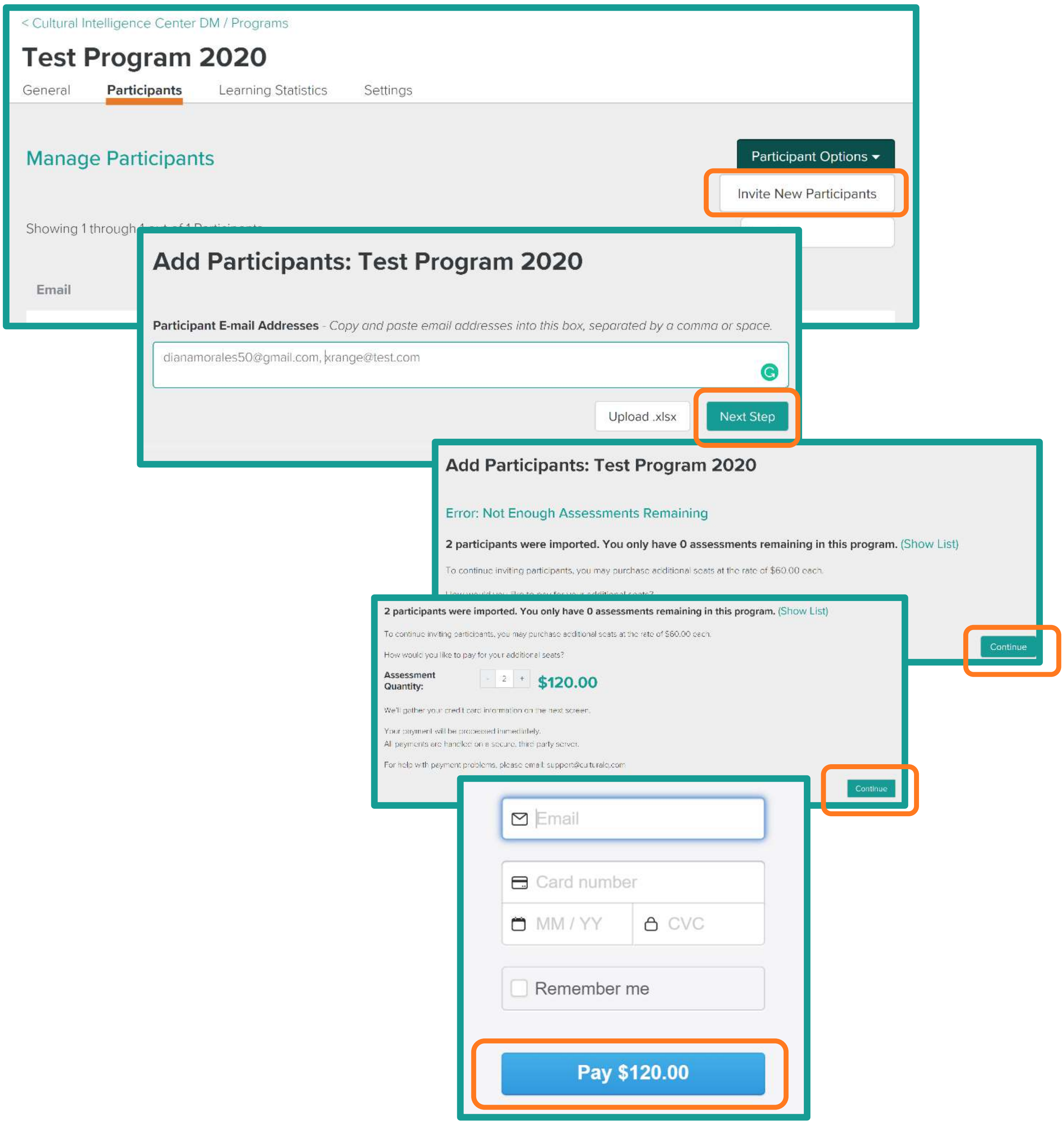




*You can pay by credit card, or invoice (for a selected minimum)
*If you choose invoice option – enter invoice information and click on *Submit Purchase*.

➢ Purchase Additional Products for An Existing Program

- Click on the *Programs* tab and then select the specific program
- Click on the *Participants* tab and then on *Invite New Participants*
- Add your new participant's email address in the text box and click on *Next Step*
- Click on the Credit Card payment method, and then on *Continue*
- Choose the quantity you would like to purchase and then click on *Continue*
- Enter payment information and click on *Pay*
- Complete Purchase and click on Invite Participants

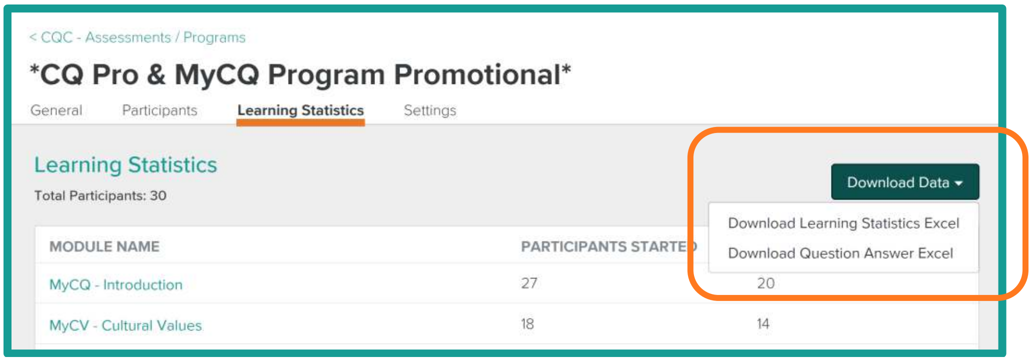


How to View E-Learning Statistics

If you purchase a product which includes E-Learning components, you will be able to view E-Learning statistics for your programs.

- Click on the *Programs* tab and then select the specific program
- Click on the *Learning Statistics* tab
- Click on the *Download Data* dropdown button
- Click on *Download Learning Statistics Excel* or *Download Question Answer Excel* to export learning statistics

To watch a video on how to view e-learning statistics click here.

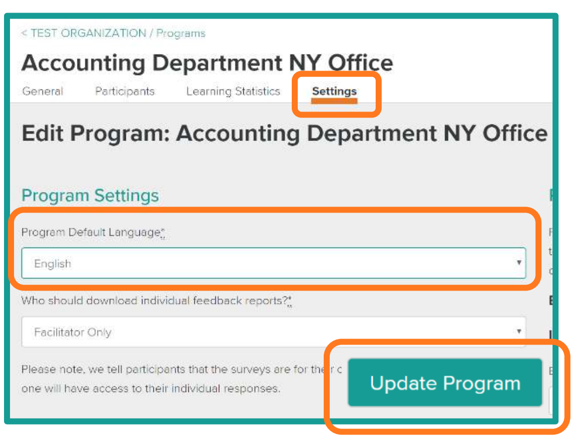


How to Change Assessment Language

To change the language of your assessments:

- Click on your organization
- Select the specific program
- Click on the *Settings* tab under that program
- Select the language under the *Program Default Language* dropdown
- Click on *Update Program* to save changes

To watch a video onhow to change the language of your assessment click here.

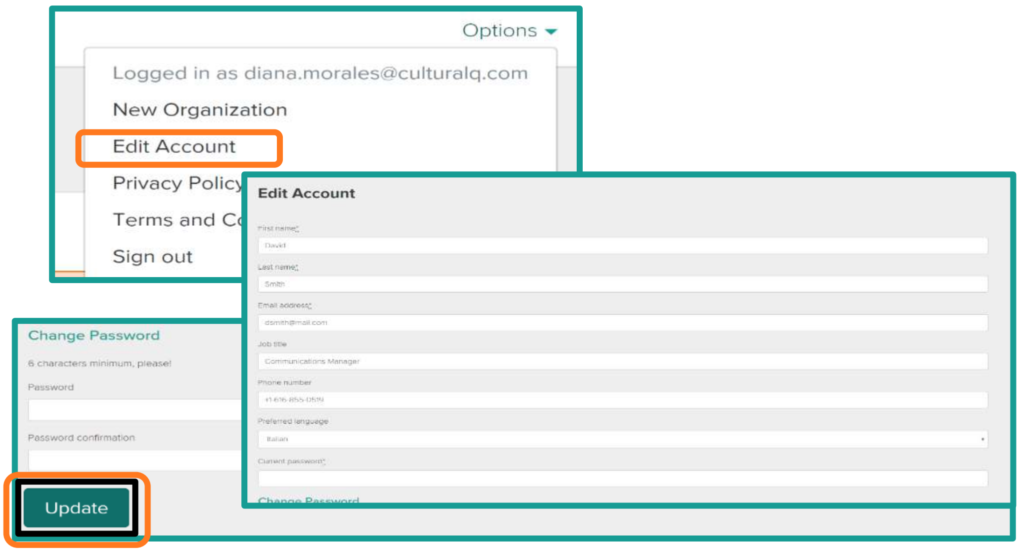


How to Make Changes to My Account

To make changes to your account, such as change the login email, name, or password:

- Click on the *Options* button on the top right
- Select *Edit Account*
- Update your contact information
- Click on *Update* to save changes

To watch a video on how to make changes to your account [click here](#).



How To's *Groups Feature

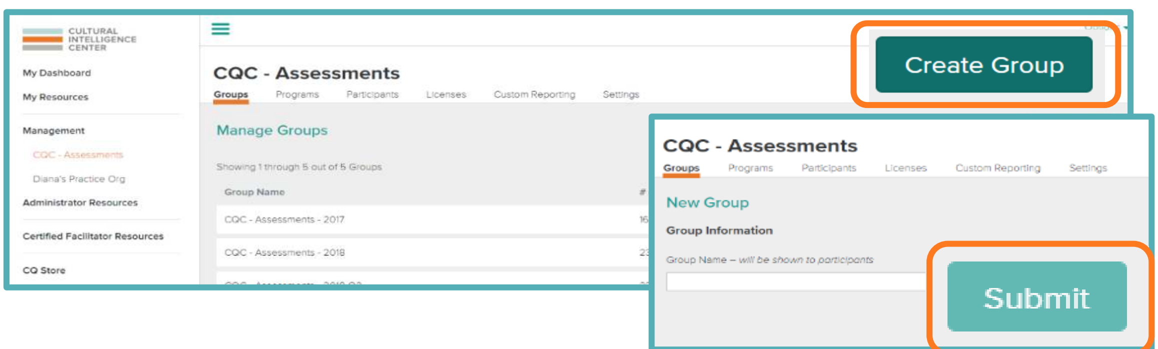
How to Setup a New Group

The following features are optional and are typically used by organizations and institutions who want to organize their program and participant management at a more granular level. If you are interested in activating Groups features (see below), please contact us.

Groups are like a department within an organization. You can use groups to organize your organization into different departments and groupings.

- Click on specific Organization in your Navigation Menu and select "*Create Group.*"
- Give your group a name and then click on *Submit* to save

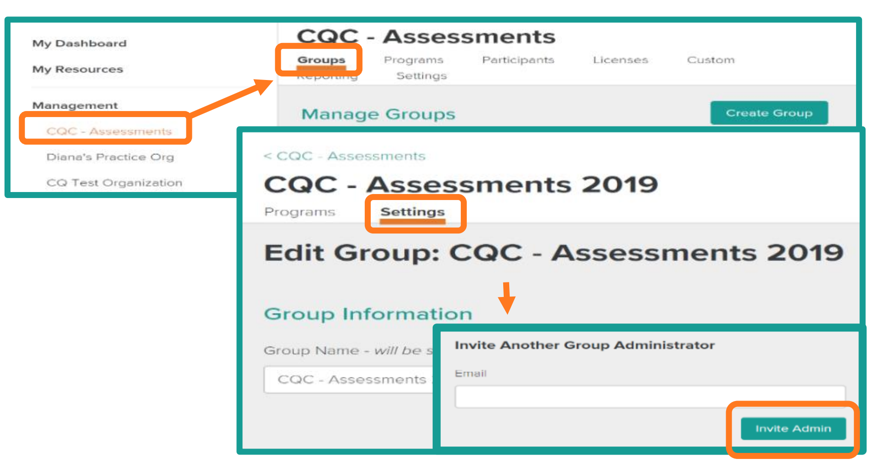
To watch a video on how to setup a new group click here.



Inviting a Group Administrator

- Click on the organization and then click on the specific Group
- Click on *Settings* and then enter new administrators email
- Click *Invite Admin* to send invitation out
  - *Group Administrators have broad authority over only the group(s) they manage, and the programs within those groups.*

To watch a video on how to invite a Group administrator click here.

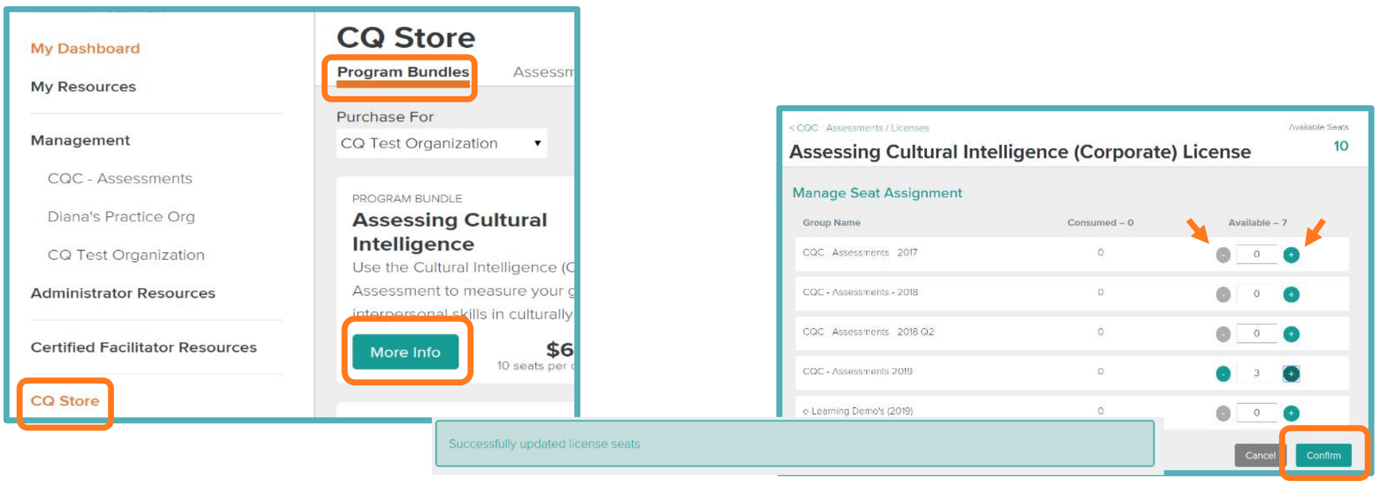


How to Purchase Additional Products for Groups

If you wish to purchase additional products for your Groups follow these instructions below.

- Click the *CQ Store* button
- Use the dropdown to select whether you want to purchase for yourself or your organization
- Use tabs across the top to view different product categories
- Select your product and click on *More Info* and add Quantity
- Choose your payment method and click on *Create Purchase* and then on *Setup*
- Locate your new license
- Click on *Configure*
- Add seats to a group or multiple groups and then click on *Confirm*

To watch a video on how to purchase additional products for your groups [click here](#).

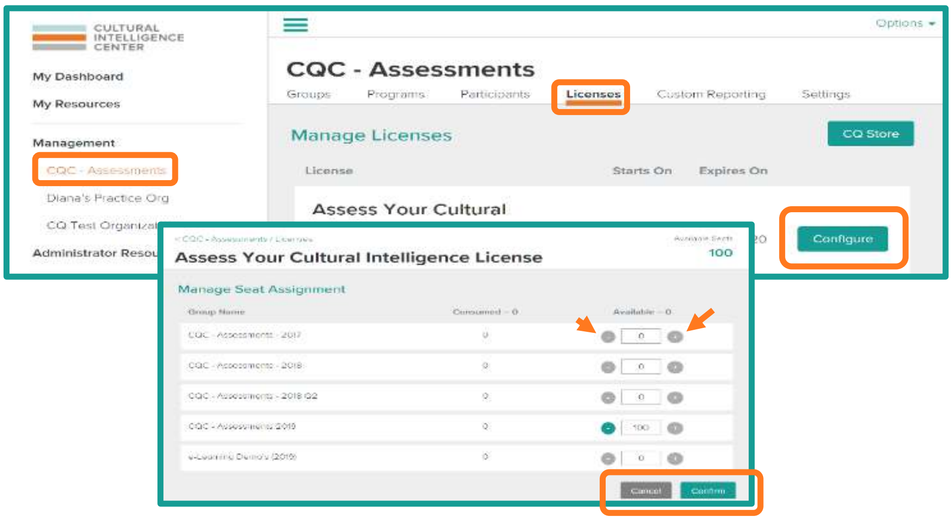


How to move Seats (products) from one Group to Another

If you have Group within your organization, you can move seats (products) from one Group to another.

- Click on the specific organization under *Management*
- Click on the *License* Tab and then click on the *Configure* button next to the license you would like to adjust seats for
- Click on the *plus* or *minus* symbols (- or +) to move seats from one Group to another
- Click on Confirm

To watch a video on how to move seats from one group to another click here.



Custom Reporting: Tagging & Flagging

Our Custom Reporting feature allows you to generate customized reports from programs and groups in your organization. This feature includes Tagging & Flagging, which allows you to create tags for organizing and grouping your participants. After creating tags, you can filter and manage tags to help stay organized.

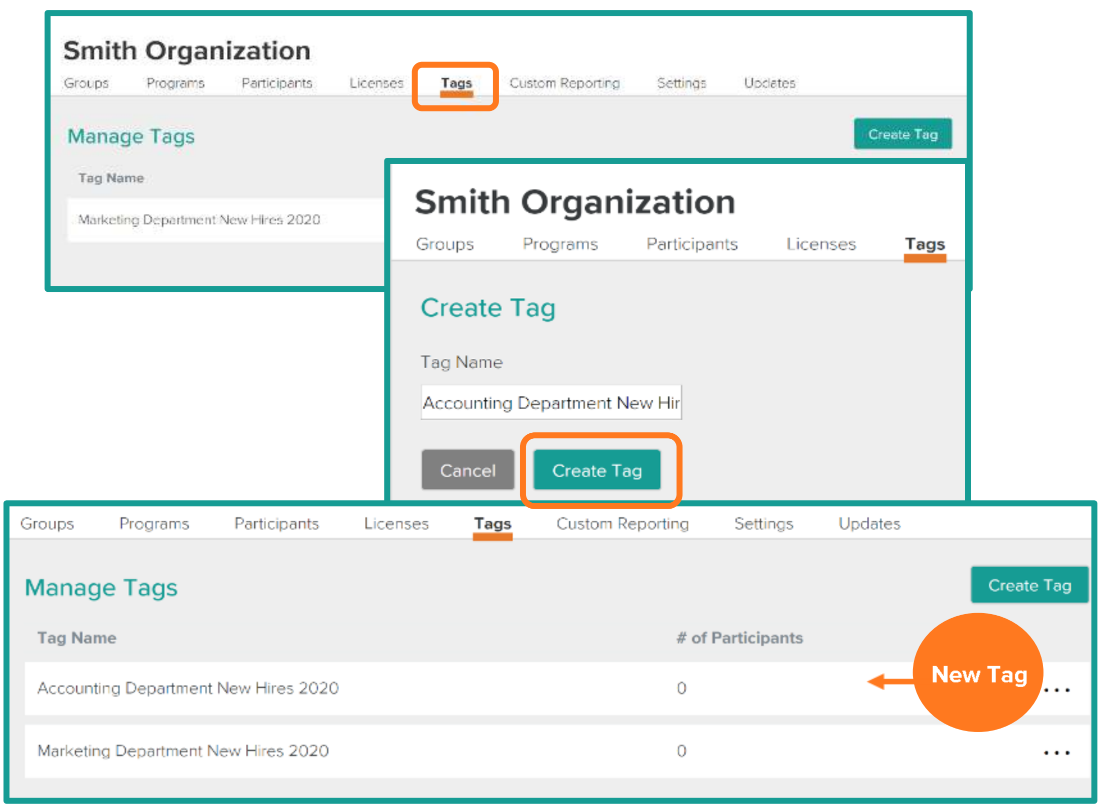
This is an optional feature that can be added to your account on **a request basis only. Please contact us if you wish you add Tagging & Flagging to your account.*

How to Create Tags

We created tags so that you can easily categorize your participants. To begin tagging your participants, you must first create your tags.

- Click on your organization
- Click on the *Tags* tab
- Click on *Create Tag*
- Name your new tag
- Click on *Create Tag* to save

To watch a video on how to create tags click here.

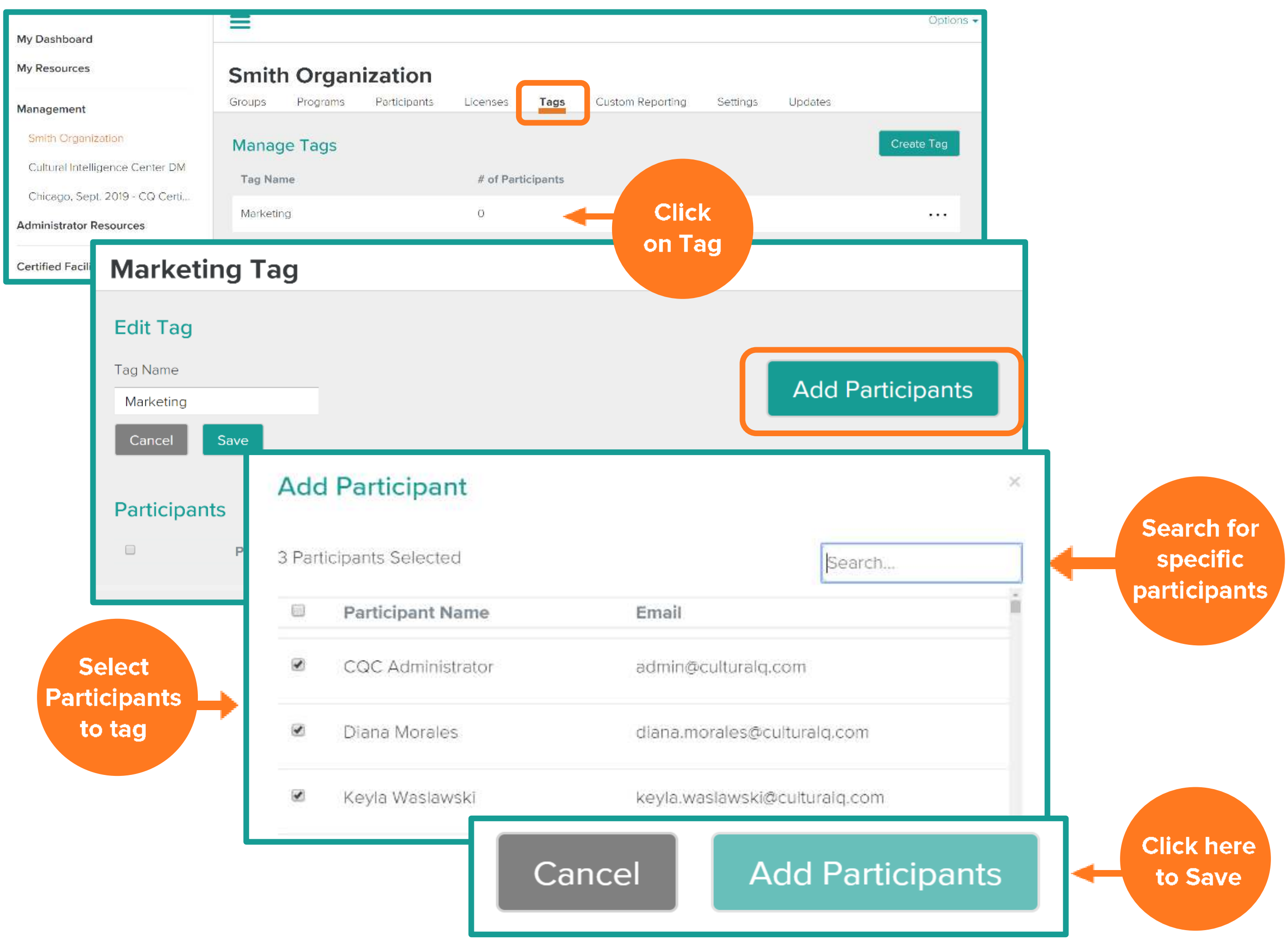


How to Tag Participants

Use tags to categorize your participants in groups based on their department, occupation, and more!

- Click on your organization
- Click on the *Tags* tab
- Select the specific tag
- Click on *Add Participants*
- Select or Search your participants
- Click on *Add Participants* to save

To watch a video on how to tag participants [click here](#).

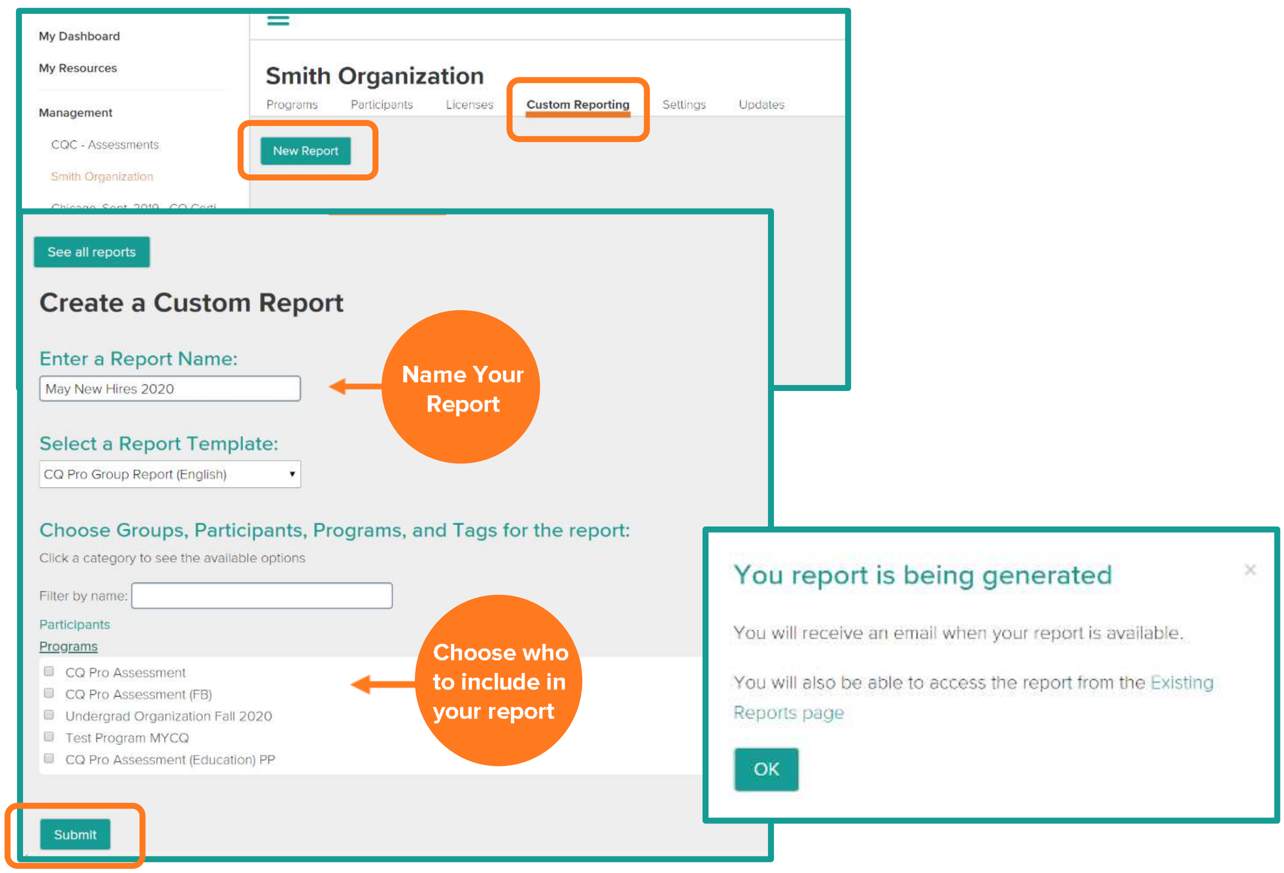


How to Create A Custom Report

Our Custom Reporting feature allows you to create custom reports of participants from all programs, and groups. Follow the steps below to create your custom report!

- Click on your organization
- Click on the *Custom Reporting* tab
- Click on *New Report*
- Create a name for your report
- Select the type of report you would like. Options include a Group Report or Team Report
- Select participants, groups, tags, or programs that you would like to include in the report
- Click on *Submit*
- You will receive an email when your report is available. You will also be able to access the report from *the Custom Reporting Tab!*

To watch a video on how to create a custom report click here.

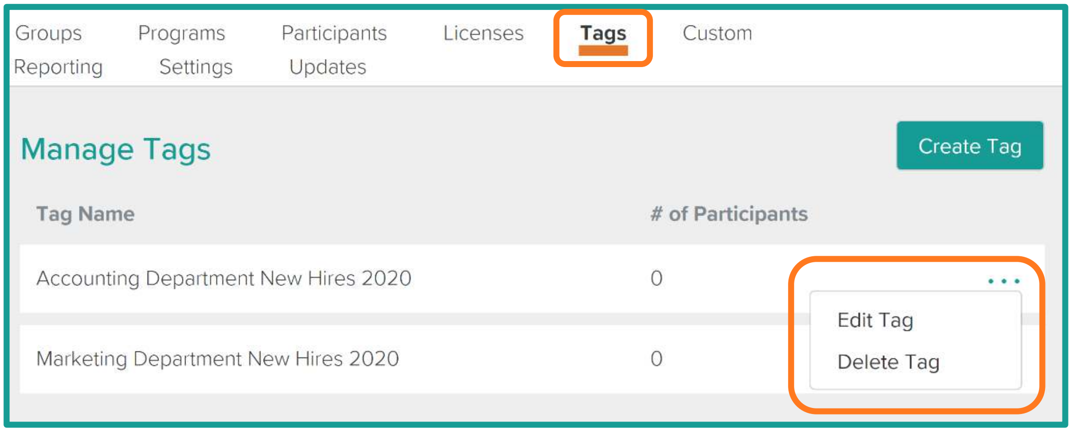


How to Remove or Edit Tags

Tags can easily be removed or edited. If you would like to change an existing tag, follow the steps below.

- Click on your organization
- Click on the *Tags* tab
- Click on the three dots beside your tag
- Select whether you want to edit or remove the tag
- Click on *Save*

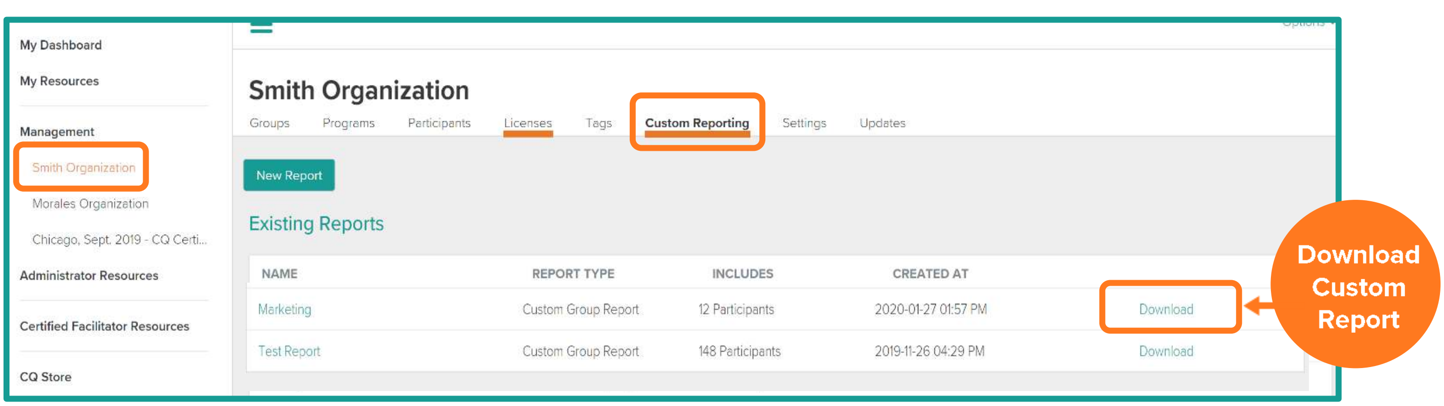
To watch a video on how to remove or edit tags click here.



How to Download Existing Custom Reports

We house all your custom reports under the *Custom Reporting* tab. To download your custom reports, follow the simple steps below.

- Click on your organization
- Click on the *Custom Reporting* tab
- A list of your reports will be displayed
- Click on *Download* to download the report



FAQ's

As an administrator, you can use the FAQ section of this document to help troubleshoot administrator and participant questions.

Participant FAQ's

Q: I did not receive confirmation instructions.
A: First, ask the participant to check their spam folder. If not there, please have them click this link: : https://cqcenter.com/users/sign_in and select "didn't receive confirmation instructions."

Q: I forgot my email address, can you help?
A: Participant information can be searched and found by clicking on the specific Program and then on the Participants tab. Once you have found the participant email, you can send along so that the participant may log in.

Q: How can I take the T2 assessment?
A: Once T2 is available, participants can log in by clicking this link: https://cqcenter.com/users/sign_in

Administrator FAQ's

Q: What do I do if someone hasn't opened the invite?
A: You can send a reminder by clicking the Participants tab on the Program page and then on *Resend Invitation* in the dropdown next the participant email

Q: How do I know if someone has registered or not?
A: Under the *Participants* tab on your program page, there will be a "*start/end*" column. This will indicate whether a participant has accepted an invitation, started, or completed the assessment.

Q: How do I administer multiple versions of the assessment?
A: To gain access to more than one assessment type, you will need to register multiple organizations. You may do this from your homepage in the portal by clicking the "*Options*" button in the upper right-hand corner, and then selecting "*Add New Organization*" from the drop-down menu.

Q: Can I transfer assessments from one license to another?
A: Yes, but only if the *Group* feature is activated. You can transfer assessments by selecting the organization, clicking on the *Licenses* tab and then on the *Configure* button next to the license you would like to modify.

Q: How long do I have to use the assessments I purchase?
A: Licenses are good for 12 months.

Q: How long can I access my additional resources?
A: Resources such as debrief guides, PowerPoint slides, videos, etc. are to be used in accordance with the purchased license. Resources should be used only within the limits of the license, and permission to use ends when the license expires.

Q: My participants cannot view or download their reports. How can I give them access?
A: As the administrator you can give your participants access to their feedback reports by changing a setting in your program. Simply go to the specific program, click on the Settings tab, and then change the *Who should download individual feedback reports? ** setting to *Facilitator and Participants.*

Q: I am a Certified Facilitator. How do I access my Certified Facilitator Resources?
A: To purchase your resources after your grace period has passed, click on *CQ Store* and then on the *Resources* tab across the top. Complete your purchase. Then your resources will be located under the *Certified Facilitator Resources* button on the portal's navigation menu.

- Public Certifications: If you were recently certified, your resources would be available to you under the *My Resources* button on the portal's navigation menu.
- Virtual Certification: If you were recently certified, your resources would be available to you under the *Certified Facilitator Resources* button on the portal's navigation menu.

Administrator FAQ's (cont'd)

Q: What if I do not use all the assessments that I purchased in a package?
A: Any unused seats can be used with new or existing programs. You can create new programs to use up the assessments or invite new participants to existing programs.

Q: What if my participant does not receive an email invitation?
A: Sometimes, emails go to spam folders. Please check there first. If not there, the invitation may have been caught up in an email server. Contacting IT departments can typically verify this. We recommend sending the information below in **bold.**

****All CQ Assessment and portal communication is sent from SendGrid.net and uses the IP address 168.245.76.226. When participants receive communication, it will show cqaccount@culturalq.com as the sending address.****

Q: I purchased a product that does not include a group report, can I upgrade?
A: The technical limitations of the system do not allow for a license upgrade. However, contact us directly at admin@culturalq.com so that we can manually add the group report to your program.

Q: What does the 360 Assessment (Multi-Rater) look like to my participants?
A: Participants will be invited to take the assessment and add observers to rate on their behalf. Although we will not share the identity of those who have completed, we do provide a full list and number of completed observers