# PROFILES SURVEY CENTER (PSC) QUICK REFERENCE GUIDE

## Common Icons

| Icon | Function | Icon | Function |
|---|---|---|---|
| | Search | | Email Report |
| | Select date | | Email report to candidate |
| | View record | | Assessment results |
| | Configure item | | Multi job match |
| | More information | | Expand |
| | Generate report | | Collapse |
| | Download PDF | | Close |
| | Distortion detected | | Move |

## Enter Respondent(s) Manually

1. On the *Manage* menu, click **Respondents**.
2. Click the **New** button.
3. Enter the respondent's name.
4. Enter the respondent's email (optional).
5. Click the **Save** button.

## Import Respondents

1. On the *Manage* menu, click **Respondents**.
2. On the *More Actions* dropdown, click **Import Respondents**.
3. Click the **Download File Template** button to download a CSV file that can be edited with all respondent names & emails.
4. After editing and saving the CSV, on the *Manage* menu, click **Respondents**.
5. On the *More Actions* dropdown, click **Import Respondents**.
6. Click the **Browse** button.
7. Select the CSV file.
8. Click the **Upload File** button.

## Schedule a Survey

1. On the *Schedule* menu, click **Surveys**.
2. Click the **New** button.
3. Select the Self from the dropdown.
4. Select the Boss from the dropdown.
5. If a 2nd and 3rd boss need to be entered, click the appropriate button and select the individual from the drop-down list.
6. Select whether or not to collect comments.
7. Enter the survey due date.
8. Click the **Continue** button.
9. Select a respondent from the drop-down list.
10. Select the respondent's "type."
11. Click the **Add to List** button.
12. After adding all respondents, click the **Save and Continue** button.
13. Click the **Email Notifications** tab.
14. Edit the Sent From Name for all the Notifications and Reminders.
15. Click the **Save** button on the email Notifications tab.

## Activating the Survey

1. On the *Manage* menu, click **Surveys**.
2. Click the binoculars icon to the left of the survey.
3. Click the **Activate** button.

## Editing the Survey

Respondents can be added and removed from a survey even after it has been activated. You can even change a label for a respondent.

1. On the *Manage* menu, click **Surveys**.
2. Click the binoculars icon to the left of the survey.
3. Click the **Edit** button to change anything about the survey.
4. Click the **Save** button.

## Processing the Survey

1. On the *Manage* menu, click **Surveys**.
2. Click the binoculars icon to the left of the survey.
3. Click the **Process Survey** button.

## Printing Reports

1. On the *View* menu, click **Completed Surveys**.
2. Select the survey(s) and select **Survey Reporting** from the *More Actions* dropdown.
3. Select the reports.
4. Click the **Continue** button.
5. Click the PDF icon to download the report or click the blue envelope to email the report to a recipient.



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