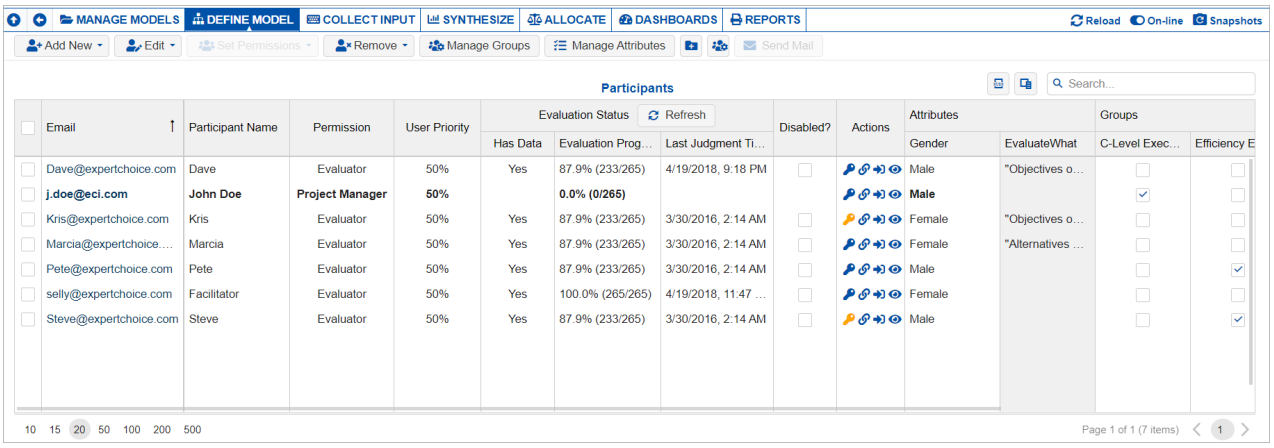
Participants

PARTICIPANTS GRID OVERVIEW



The Participants Grid consists of the following columns:

- Participant Email - unique identifier and can't be modified
- Model Participant Name - participant name and can be modified

> A participant can have a different name on each Comparion model he/she belongs to. This is useful when the Project Manager wants to add an alias or role to the participant (e.g Executive, Expert, etc.). The participant's "Participant Workgroup Name" is the name displayed at the top right when the participant is logged in on Comparion.

- Permission - Evaluator, Project Manager, Viewer, Evaluator/Viewer
- User Priority - user weights used in the Synthesize Results, this column is hidden by default. Use the column chooser [image needed] to show.
- Evaluation Status:
  - Has Data - Yes if the user has judgments, No if none.
  - Evaluation Progress - percentage; the number of judgments evaluated or a total of judgments to evaluate.
  - Last Judgment Type - date and time the last judgment was made.
- Status (Disabled?) - checkbox to enable or disable a participant from the model.
- Actions - reset password, get link, log in as a participant, view-only evaluation.
- Participant Attributes - attributes are used to assign participants to groups dynamically. Participant Attributes can be dynamic or non-dynamic:

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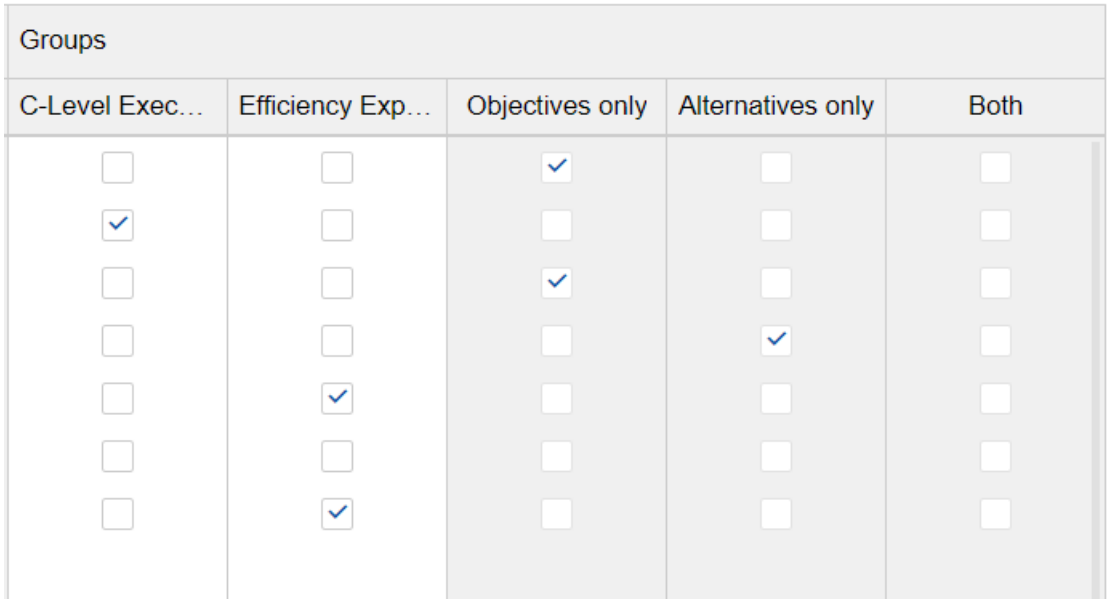
Attributes	
Gender	EvaluateWhat
Male	"Objectives o…
Male	
Female	"Objectives o…
Female	"Alternatives …
Male	
Female	
Male	

- **Non-dynamic Participant Attributes -** are assigned to the participants manually in the Participants grid. These attributes have a white background color and are editable (Gender).
- **Dynamic Participant Attributes** - When a Participant takes an insight survey, their responses can be used to update the participant attributes (and also update participant group membership) of their participant record. These attributes have a gray background color and are non-editable.

- Participant Groups



- **Non-dynamic Groups** - participants are assigned to non-dynamic groups manually in the Participants grid by checking the checkboxes. Non-dynamic groups have a white background (C-Level Executives and Efficiency Experts).
- **Dynamic Groups** - participants are assigned to dynamic groups, as specified by their attributes. Dynamic groups columns have a gray background and the checkboxes are disabled (Objectives Only, Alternatives Only, Both).

You can search by typing in the participant name or email:

If there are many participants in the list, you can use the pagination at the bottom of the grid.

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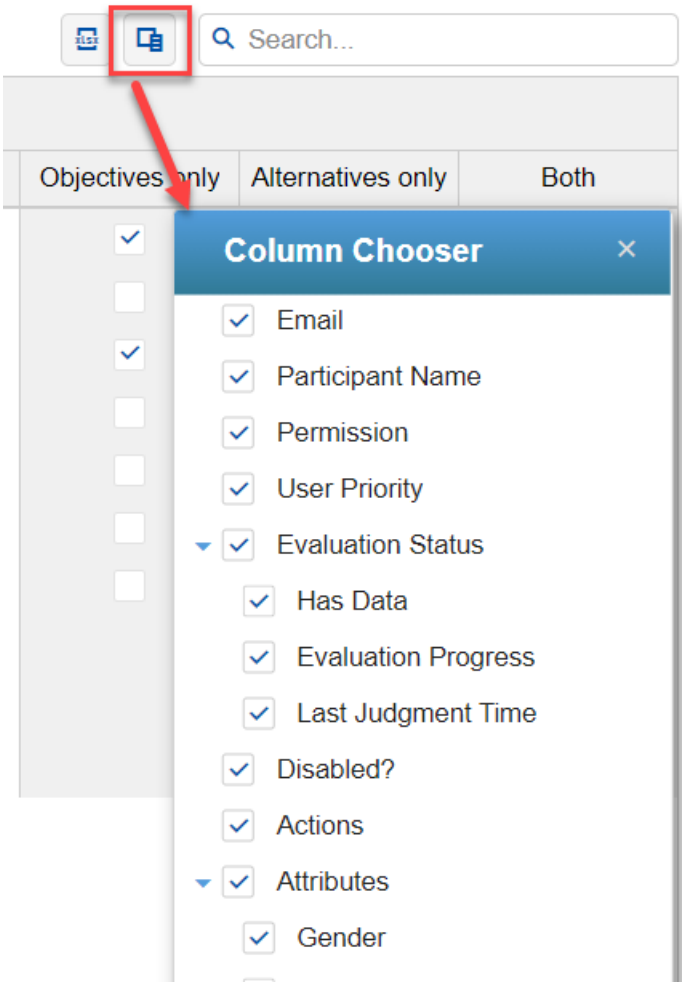
You can hide or show columns using the column chooser:

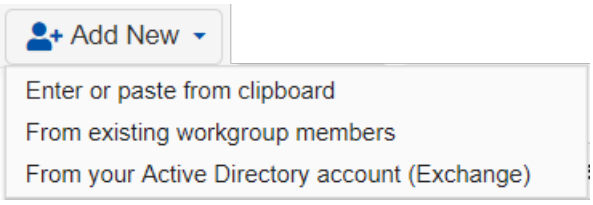


Click to export the participants' grid in .xslx format.

ADD PARTICIPANTS (ENTER OR PASTE, WORKGROUP, ACTIVE DIRECTORY)

Participants can be added to a model in a variety of ways.

This can be done in **DEFINE MODEL > Define Participants & Roles >Participants** page.



1. Enter or paste from clipboard

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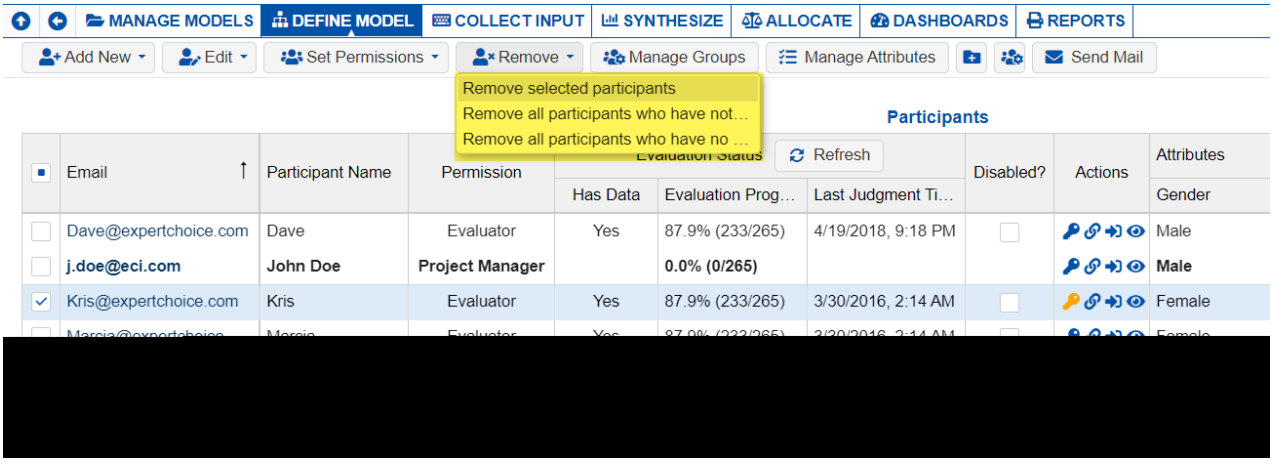
1. **Reset Password** sets or resets the password for the participant. Gold key indicates that the user has a password, blue key means user has no password. You can see other options for resetting passwords here.
2. **Copy the evaluator's anytime link** on the clipboard
3. **Log out and log back** in with another user's anytime link
4. **View the evaluation steps** and judgments for any evaluator. This is a "view only" mode so while you can enter or change judgments, they will not be saved.

Note: Actions 2-4 are also available from the Evaluation Progress screen.

REMOVE PARTICIPANTS

You can remove or delete participants from **DEFINE MODEL > Define Participants & Roles > Participants** page.



Clicking the Remove button displays 3 options to remove the participant(s):

- Remove selected participants. This option is greyed out until one or more participants are selected using the checkboxes to the right of the participants.

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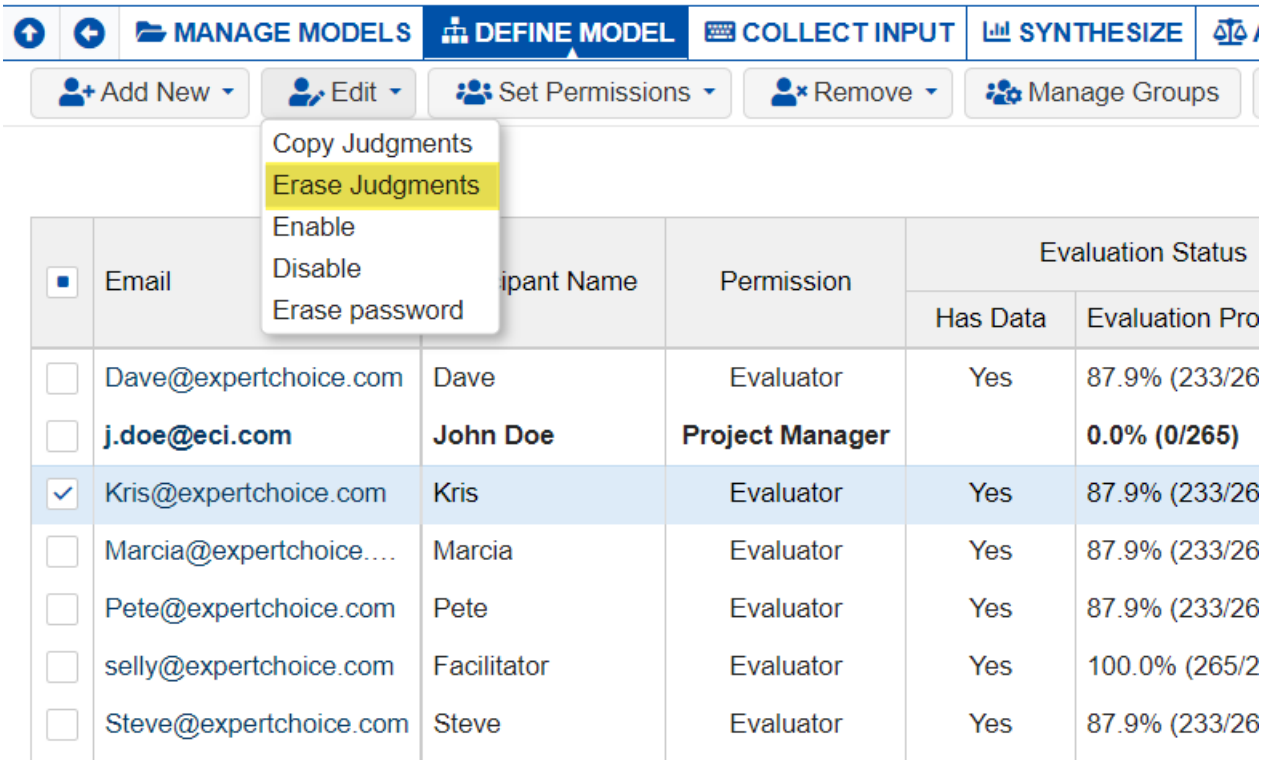
- Remove all participants who have not completed their judgments.
- Remove all participants who have no judgments.

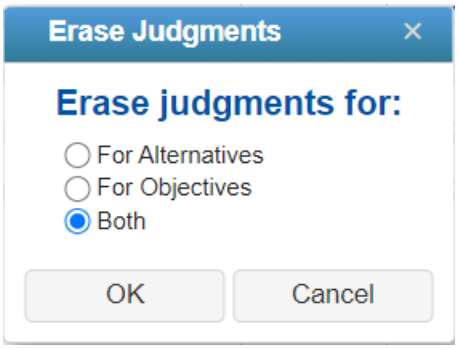
ERASE PARTICIPANT'S JUDGMENTS

You can erase the participant's judgments in**DEFINE MODEL > Define Participants & Roles >Participants** screen.

Simply check the checkboxes to the left of the name of the participant(s) you want to delete judgments, click Edit > Erase Judgments.



A dialog box to delete Objectives, Alternatives, or Both will be displayed. Select and click OK.



USER PRIORITIES (WEIGHTS)

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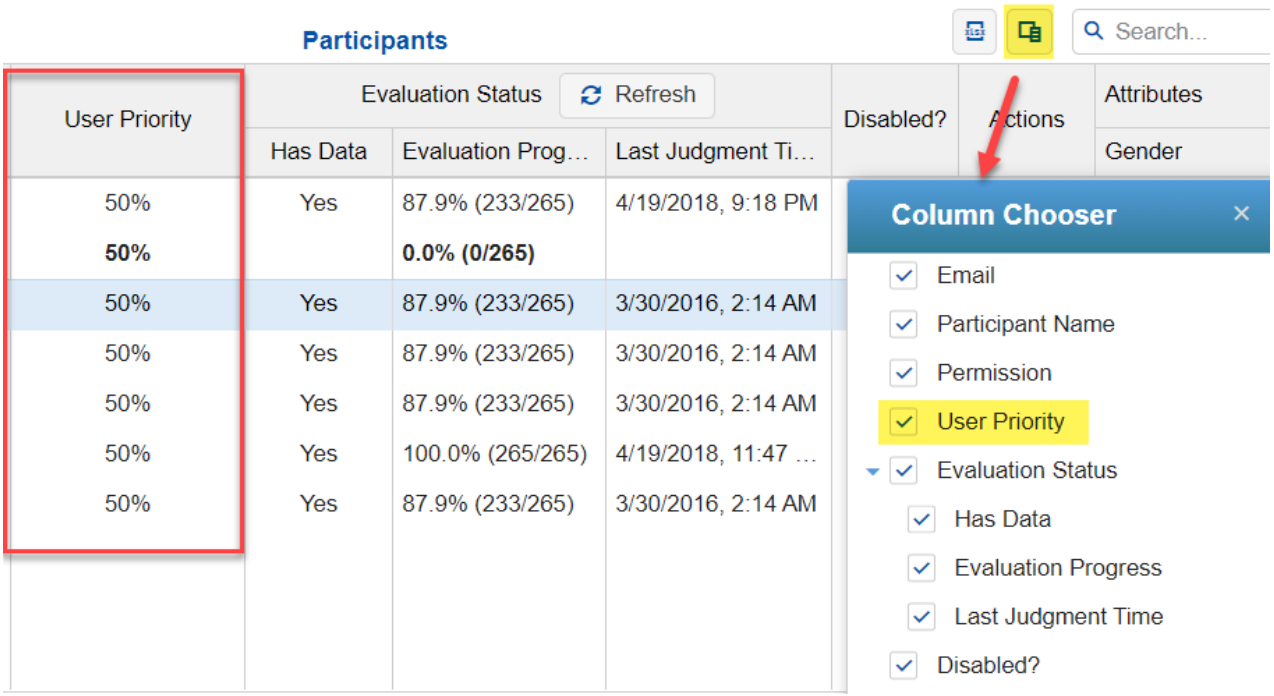
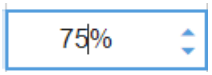
You can set and edit participant priorities (that will be used to weigh the participant's judgments).

By default the User Priorities is hidden; use the column chooser to show it:



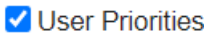
When the User Priority check box is enabled, the User Priority column is displayed as shown above.

You can then set the relative priorities by typing in a value from 0 to 100% in a cell:



By default, all of the participant priorities are the same value of 50% so that you can easily either increase or decrease the priority of one participant.

You can specify to see results with or without participant priorities when viewing results in the Synthesize screens, by clicking the User Priorities check box in Advanced mode.



COPY JUDGMENTS TO SELECTED PARTICIPANTS

Judgments can be copied from one participant to another participant(s). This can be done in**DEFINE MODEL > Define Participants & Roles > Participants** page.

Select Edit > Copy Judgments:

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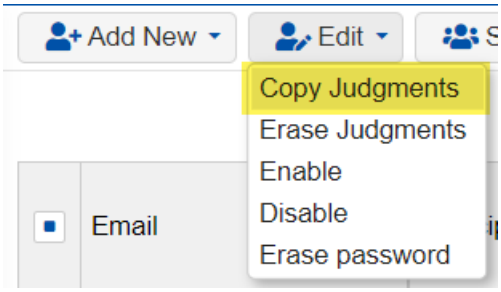
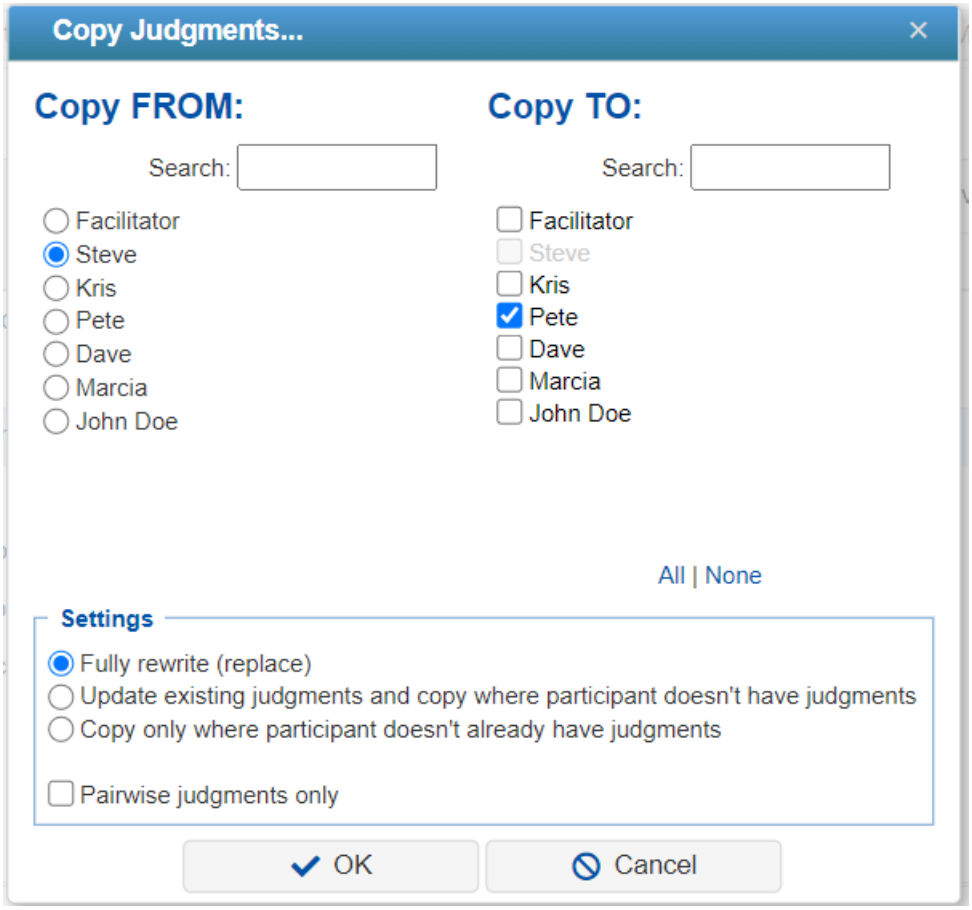


This will open a dialog box where you can select the participant where the judgments will be copied from (left) and the participant(s) where the judgments will be copied to (right):



- **Fully rewrite (replace)** - A will override all judgments of B, judgments will be the same
- **Update existing judgments and copy where participant doesn't have judgments**
  - if A and B have judgment -override B with A's judgment
  - if B has judgment but A doesn't -- retain B's judgment
  - if B doesn't have judgment; A has -- copy B judgment
- **Copy only where participant doesn't already have judgments**- similar to above, except A won't override existing judgments of B.

ADD, EDIT, DELETE PARTICIPANT GROUPS

You can add, edit, and delete the participants groups from**DEFINE MODEL > Define Participants & Roles >Participants** page.

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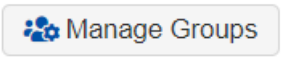
Participant Groups can be used when:

- Setting up roles and
- Displaying results

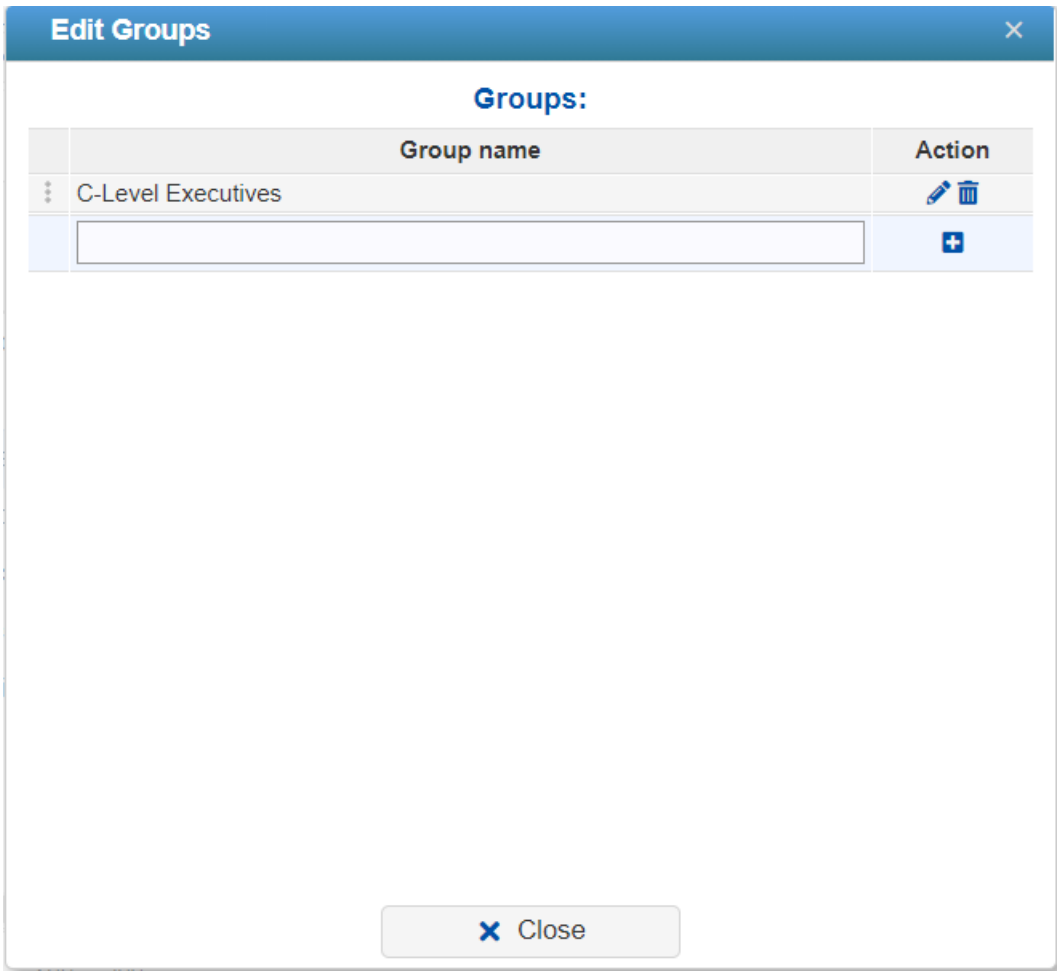
Participant Groups can be:

- Dynamic - in which membership is determined based on the**Participant attributes.**
- **Non-dynamic** - membership is manually assigned by the Project Manager, or as specified when getting the AnyTime General Invitation link.

Click the 

button.

The Manage Groups dialog box will be displayed where you can add, edit, and delete groups.



To add a new one, type the Group name in the text box and then press the plus icon:

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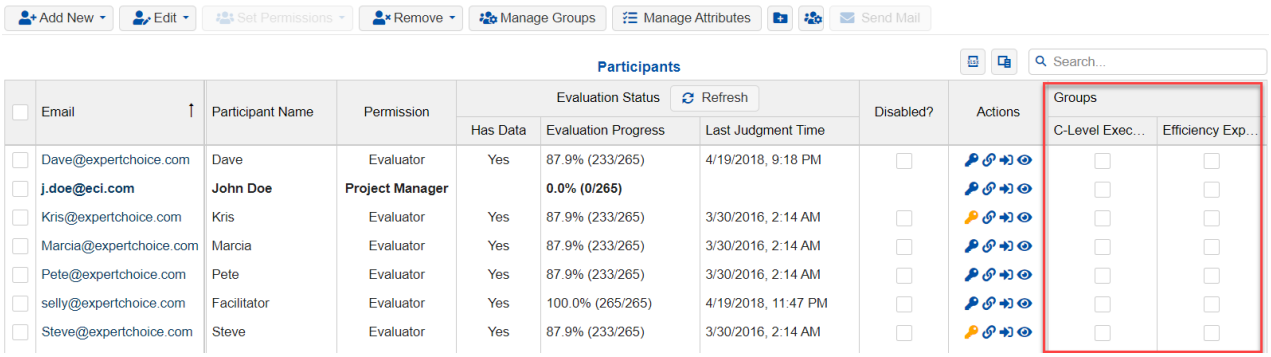
Groups are displayed as columns on the Participants table.



Groups added from the Manage Groups window have a**white** background color. You can manually assign the participants to the groups by checking the corresponding checkboxes on the Groups columns.

Participant Groups can also be**Dynamic** -- in which membership is determined based on the**Participant attributes**. Dynamic Groups columns have a **gray** background and the checkboxes are disabled. Dynamic Groups are discussed**here**.

Managing Participant groups is also available on theParticipants Group page.

PARTICIPANT ATTRIBUTES

Participant Attributes can be managed in the**DEFINE MODEL > Define Participants & Roles >Participants** page.

Overview

Participant attributes are the attributes or properties that are assigned to the participants.

Participant Attributes are used to filter participants and createDynamic Groups, both from the Participants page and the Synthesize screens.

You can add participant attributes in two ways:

Manage Participants Attributes

Clicking the Manage Participant Attributes

opens a dialog box where you can add, edit, or delete participant attributes.

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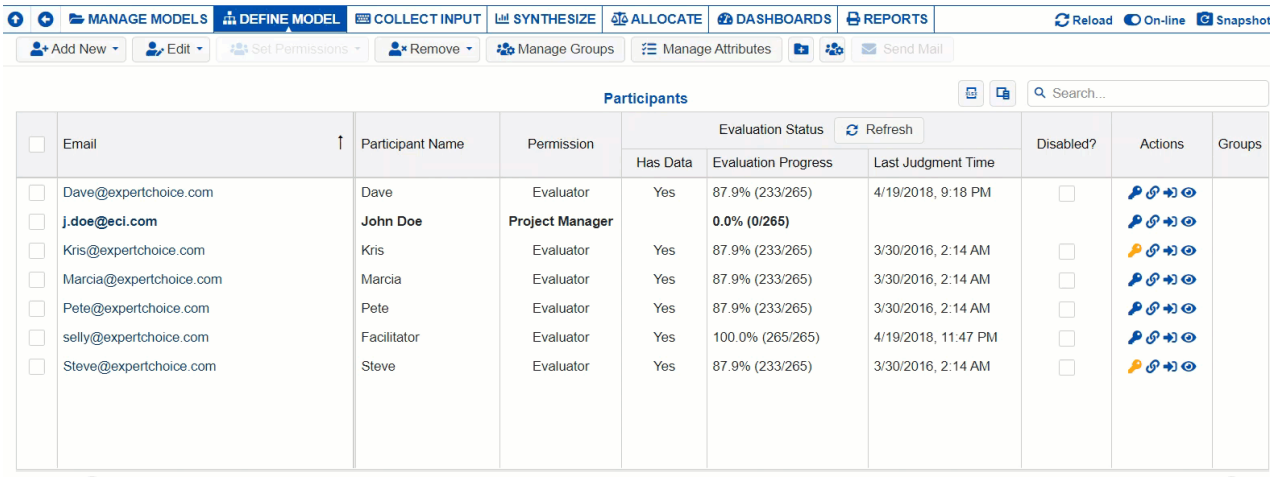
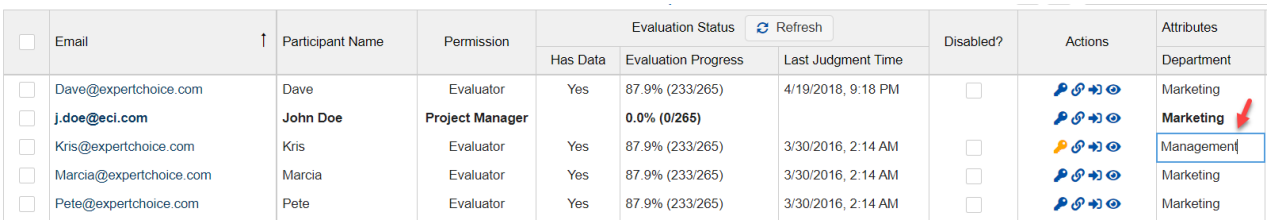


The added participant attributes are displayed as new columns on the Participants table.

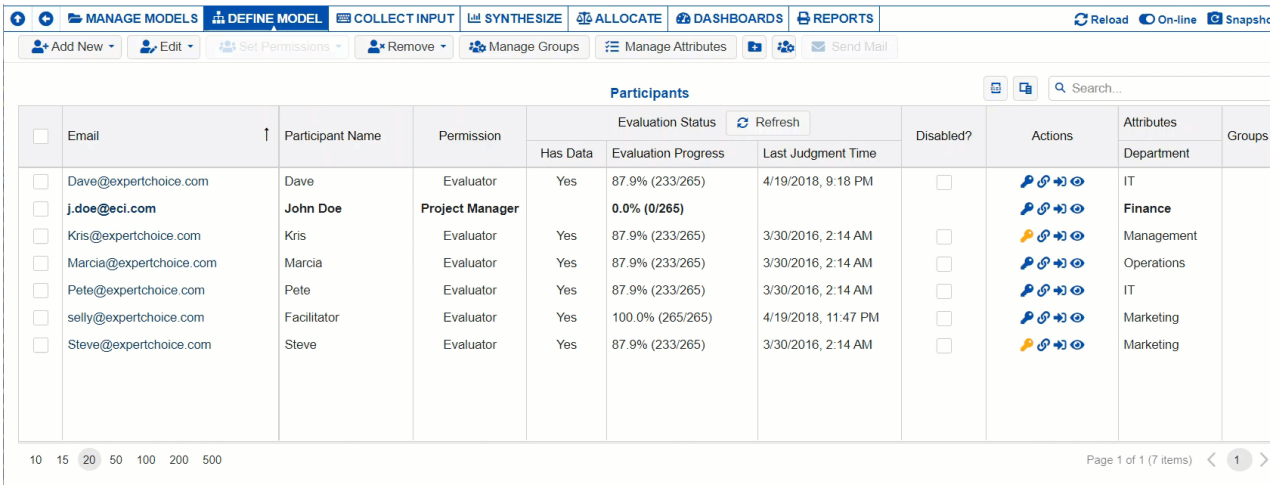
The attribute values are pre-populated if the "Default Value" is specified; otherwise, the cells will be blank. The Project Manager can update the values by clicking on the cell and then typing in the value as desired. Only Participant attribute cells with white backgrounds are editable.



Add Attributes Using Insight Question

Participant Attributes can be added from Insight Questionnaires by clicking .

Participant Attributes added from Insight Questions are also displayed on the Participants table, but the cells are not editable (greyed out). The attribute values are populated based on the participant's answers to the linked insight question.



By default, the attribute name is the same as the insight survey question. We recommend shortening the attribute name if it's

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from a long survey question. In the example above, the Attribute is renamed to "EvaluateWhat."

The attribute values are populated based on the participant answers to the question, "What do you want to Evaluate?"

From above, the user named "John Doe" is assigned the "Objectives Only" categorical code value for the EvaluateWhat participant attribute. This attribute assignment gets updated whenever John Doe modifies his answer to this insight survey question.

The Project Manager can createDynamic Groups by checking the "Create dynamic groups check box." See more details about Dynamic Groups here.

DYNAMIC PARTICIPANTS GROUPS

You can create Dynamic Groups in the**DEFINE MODEL > Define Participants & Roles >Participants** page.

A **Dynamic group** is defined as a participant group in which membership is determined by theparticipant attributes. This allows the Project Manager to define the participant evaluation roles in terms of their attributes.

There are two ways to create Dynamic Groups:

1. Create Dynamic Groups from Participant Attributes Filter

Click to open a dialog box for filtering the participant list by participant attribute:

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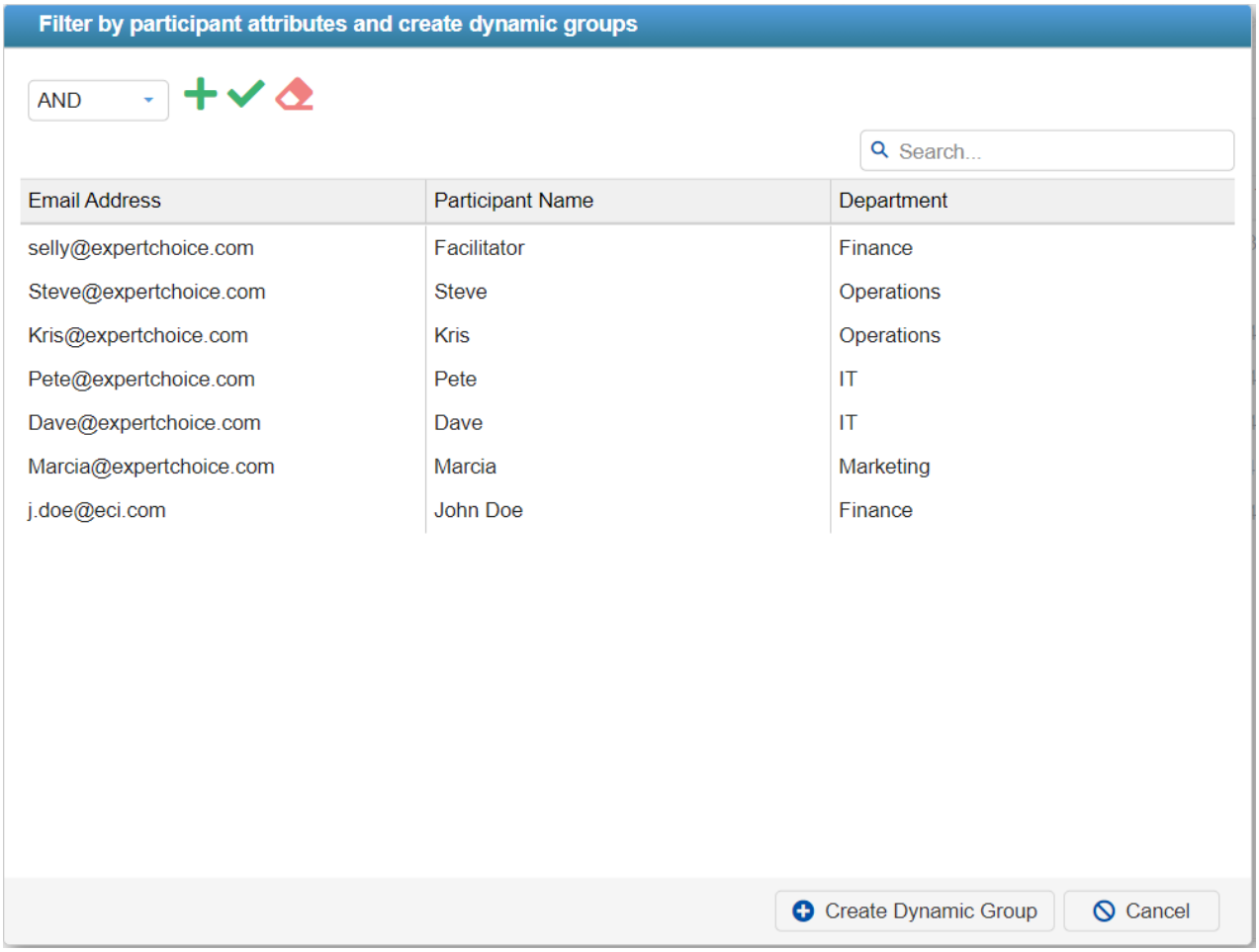
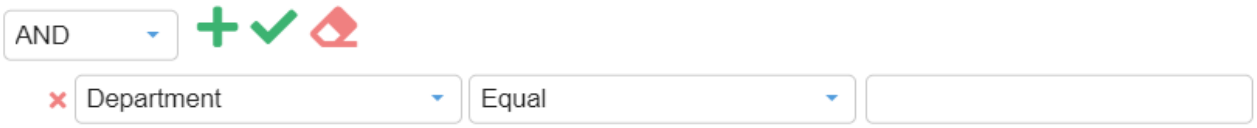


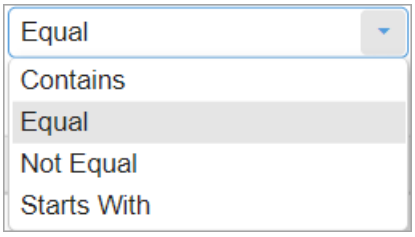
Here you can specify one or more conditional statements and then create a Dynamic Group based on the created filter.

Click to add a conditional statement:



From above, "**Department**" is the participant attribute name when there are more participant attributes in the model; you can click on it to expand the dropdown.

"**Equal**" is the conditional statement. Other conditions are available depending on the attribute type (string, bool, int, long). For string, the following conditions are available:



The last text box is where you will enter the attribute value - for example, "**IT.**"

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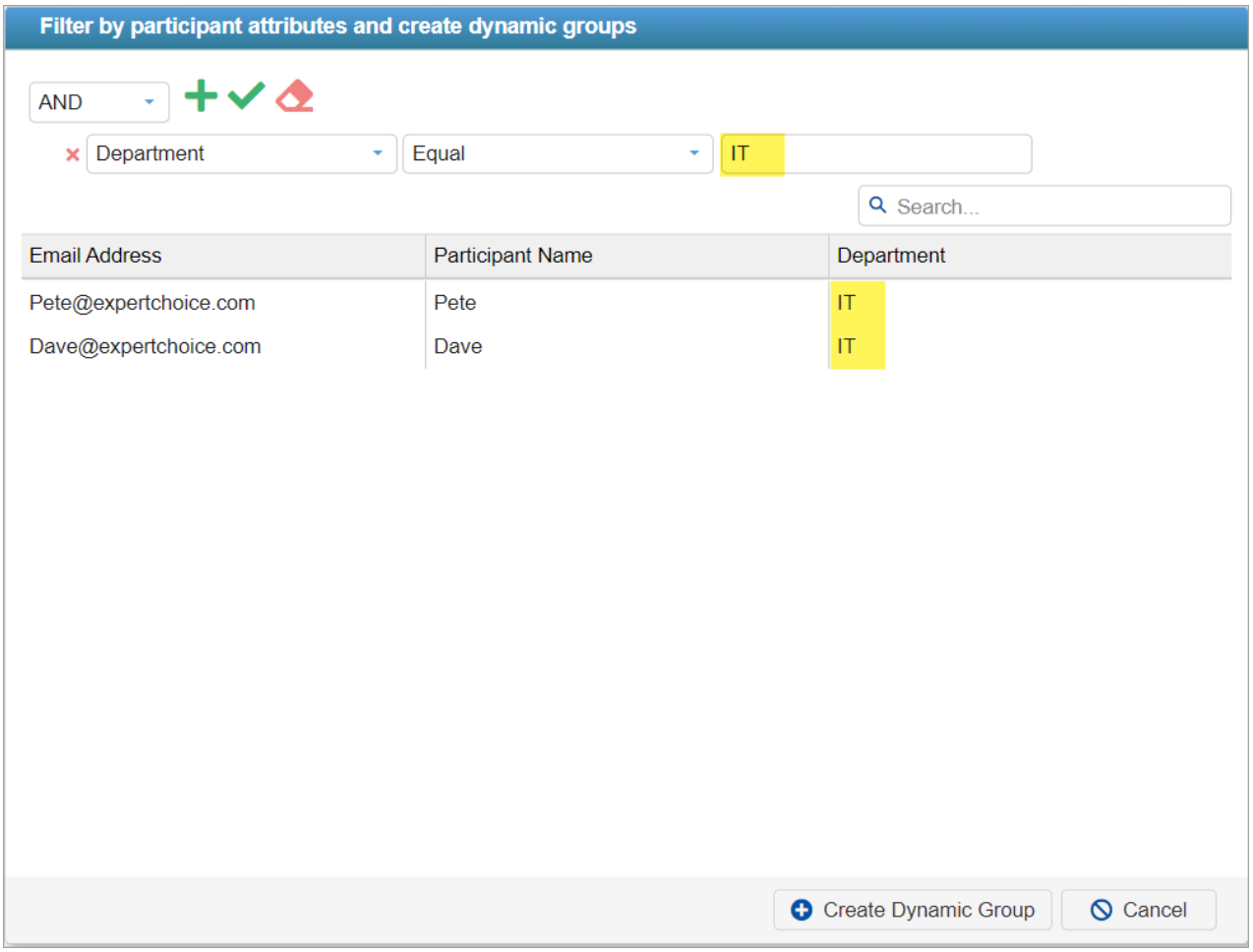
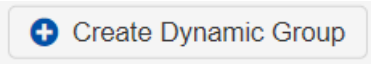
Click to see the filtered list.

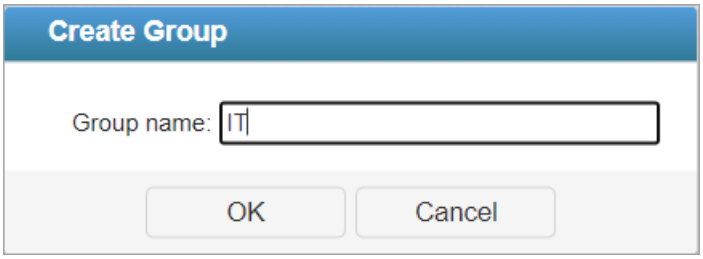


You can add more conditions as needed and specify if:

- **AND** - all conditions must be satisfied
- **OR** - at least one should be satisfied

Click  to create a group based on the current condition.

A dialog box will open where you will specify the group name; in our example, we will enter "IT."



The new dynamic group is added as a new column on the participant grid, under the "Groups" section.

Notice below that the participants with "Department" as IT belongs to the group IT as shown on the checkmark on the IT group.

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Email	Participant Name	Permission	Evaluation Status (Load)			Disabled?	Actions	Attributes	Groups	
			Has Data	Evaluation Progress	Last Judgment Time			Department	C-Level Exec...	IT
Dave@expertchoice.c...	Dave	Evaluator	Yes	87.9% (233/265)	4/19/2018, 9:18 PM			IT		✓
j.doe@eci.com	**John Doe**	**Project Manager**		**0.0% (0/265)**				**Finance**	✓	
Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM			Operations		
Marcia@expertchoice...	Marcia	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM			Marketing		
Pete@expertchoice.c...	Pete	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM			IT		✓
selly@expertchoice.c...	Facilitator	Evaluator	Yes	100.0% (265/265)	4/19/2018, 11:47 PM			Finance		
Steve@expertchoice....	Steve	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM			Operations		
z.bayta@eversun.ph	**Project Manager**	**Project Manager**		**0.0% (0/265)**						

The Dynamic Groups cells/checkboxes in the Participant table are disabled (grayed out) since its assignment is based on the participant attributes conditional statement(s); thus it can't be edited.

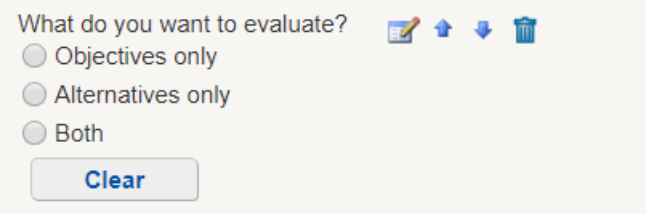
Non-dynamic groups (C-Level Executives in the example above) have a white background and can be edited by checking or unchecking their checkboxes.

The Dynamic group assignment is being updated automatically each time the attribute assignment is changed or modified.

2. Create Dynamic Groups based on Insight Questionnaires

Dynamic Groups can also be added when creating aParticipant Attribute from an Insight Question.

For example, we have aninsight question:



A Participant Attribute can be created from this insight question, and the possible answers or choices are the dynamic groups the participants can be assigned to, as determined by their answer to the question:

To add dynamic groups from an Insight Question, click the button.

This will open a dialog box listing the insight questions of the model.

Simply select the question you want to link to a participant attribute, and then check the check box to create groups using the answers on the selected survey question.

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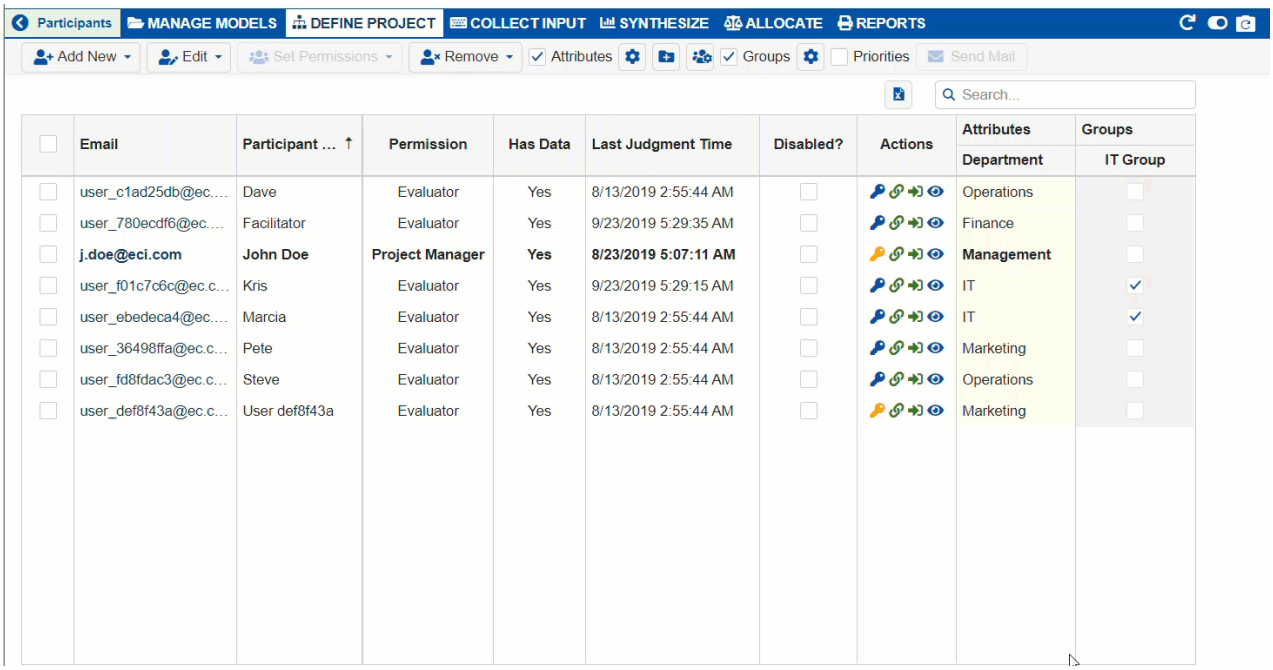

From above, a participant attribute named "EvaluteWhat" was created. The dynamic groups were also created based on the following answers:

- Objectives Only
- Alternatives Only
- Both

Set-up evaluation roles using the Dynamic Participant Groups

When dynamic groups are created, roles can be assigned to the participants dynamically bysetting up roles for the dynamic groups.

For example, for the Dynamic Groups added from the Insight Survey above, the Project Manager can assign the roles as follows:

- Objectives Only -- assign roles to evaluate only the Objectives
  - (EvaluateWhat equals "Objectives Only")
- Alternatives Only -- assign roles to evaluate only the Alternatives
  - (EvaluateWhat equals "Alternatives Only")
- Both -- assign roles to evaluate both Objectives and Alternatives
  - (EvaluateWhat equals "Both")
- All Participants -- Undefined or Drop All

When a participant answers the insight question with "Objectives Only" and then clicks the Next button, the participant will be added to the "Objectives Only" group; thus the evaluation will be created according to the "Objectives Only" and "All Participants" roles - that is, to evaluate only the objectives.

> Setting up roles for Dynamic Groups is done on the**DEFINE PROJECT > Participant Roles**page; the process is similar to Setting up roles with groups (non-dynamic).

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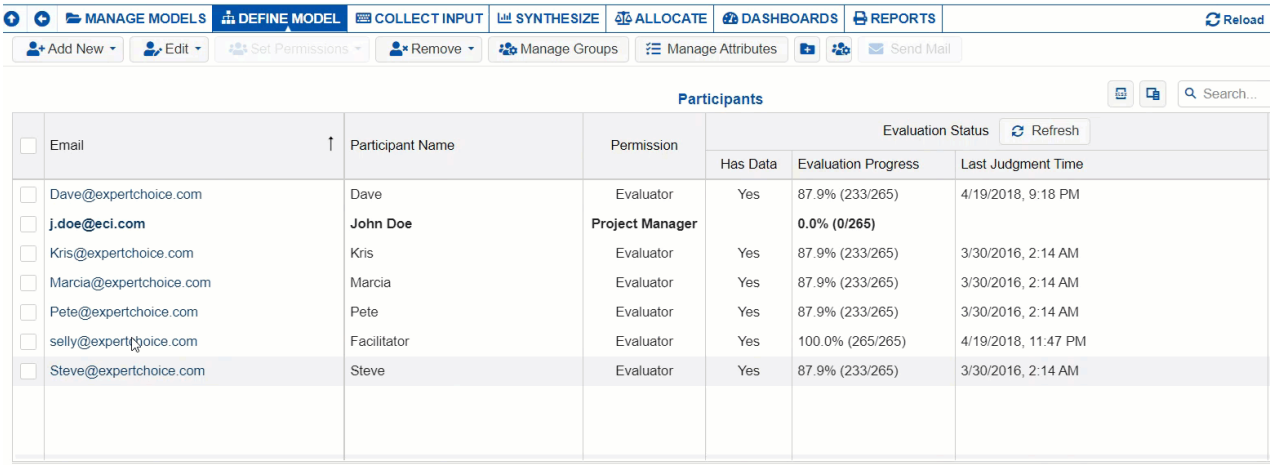
DEFINE PARTICIPANT PERMISSION IN A MODEL

You can update the model user permission in **DEFINE MODEL > Define Participants & Roles > Participants** page.

A model user can be a **Project Manager**, **Evaluator**, **Viewer,** and **Evaluator/Viewer.**



- Project Manager - has overall control over the model
- Evaluator - are participants to evaluate the decision model
- Viewer - can view results of the decision model
- Evaluator/Viewer - has evaluator and viewer permission

Project Managers are displayed in **bold** font in the project's participant list.

Read the table below to see more of what each role can do.

Model Level Permission

Permission	Project Manager	Evaluator	Evaluator/Viewer	Viewer
Modify model hierarchy	Y			
Modify alternatives list	Y			
Modify alternatives' contributions	Y			
Set specific viewing roles	Y			
Set specific evaluation roles	Y			
Download Model	Y			
Delete Model	Y			
Evaluate Model	Y	Y	Y	

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Permission	Project Manager	Evaluator	Evaluator/Viewer	Viewer
Perform Sensitivity Analysis	Y		Y	Y
View Overall Results	Y		Y	Y
View Model	Y		Y	Y
Use predefined models	Y		Y	Y
Manage Model Participants	Y			
Manage Model options	Y			

Assigning a **Project Manager** permission depends on a user's Workgroup Permissions (System Manager, Workgroup Manager, Project Organizers, Workgroup Members).

All Workgroup Users except Workgroup Members can be Project Managers.

Workgroup Permission	Can be a Project Manager?
System Manager	Y*
Workgroup Manager	Y*
Project Organizer	Y**
Workgroup Member	N

* user automatically becomes a Project Manager when they access a project for the first time.
** Optional as assigned by the Project Manager. A Project Organizer who creates a model is a Project Manager of that model.

When you try to set a Project Manager permission to an Evaluator who is only a Workgroup Member, a confirmation prompt asking to make him/her a Project Organizer will be displayed. Click OK to agree.

Note also that a Workgroup Manager in a Workgroup is always a Project Manager in each model.

ENABLE OR DISABLE PARTICIPANTS

You can enable or disable model participants from **DEFINE MODEL > Define Participants & Roles >Participants** page:

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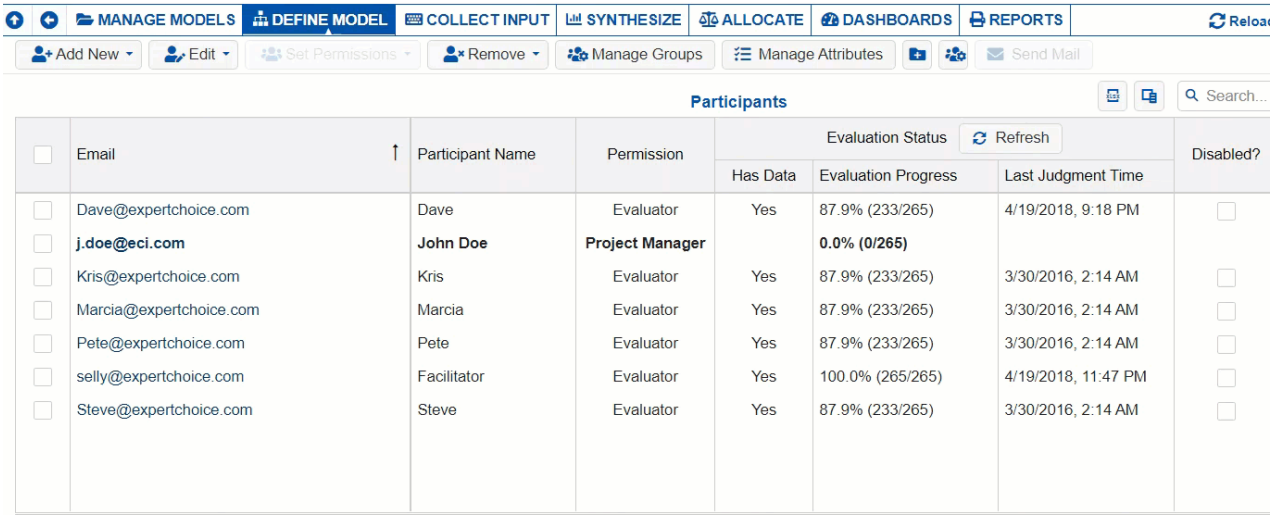

To enable or disable model participants:

- check (disable) or uncheck (enable) the check box on the "Disabled?" column; or
- select the participant(s) you want to enable or disable, and then click the Edit button and select Enable or Disable.

Disabled participants are displayed in grey font color. Disabled participants will not be able to enter judgments but judgments they previously entered will be included in computing results. If you don't want this to be the case, you can restrict roles for the disabled participant or delete their judgments as described above.

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