

Participants

PARTICIPANTS GRID OVERVIEW

MANAGE MODELS														DEFINE MODEL	COLLECT INPUT	SYNTHESIZE	ALLOCATE	DASHBOARDS	REPORTS	Reload	On-line	Snapshots
Add New														Edit	Set Permissions	Remove	Manage Groups	Manage Attributes	Send Mail	Search...		
Participants														Refresh			Search...					
Email	Participant Name	Permission	User Priority	Evaluation Status			Disabled?	Actions	Attributes		Groups											
				Has Data	Evaluation Prog...	Last Judgment Ti...			Gender	EvaluateWhat	C-Level Exec...	Efficiency E										
<input type="checkbox"/> Dave@expertchoice.com	Dave	Evaluator	50%	Yes	87.9% (233/265)	4/19/2018, 9:18 PM	<input type="checkbox"/>		Male	"Objectives o...	<input type="checkbox"/>	<input type="checkbox"/>										
<input type="checkbox"/> j.doe@eci.com	John Doe	Project Manager	60%	Yes	0.0% (0/265)		<input type="checkbox"/>		Male		<input checked="" type="checkbox"/>	<input type="checkbox"/>										
<input type="checkbox"/> Kris@expertchoice.com	Kris	Evaluator	50%	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Female	"Objectives o...	<input type="checkbox"/>	<input type="checkbox"/>										
<input type="checkbox"/> Marcia@expertchoice.com	Marcia	Evaluator	50%	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Female	"Alternatives ...	<input type="checkbox"/>	<input type="checkbox"/>										
<input type="checkbox"/> Pete@expertchoice.com	Pete	Evaluator	50%	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Male		<input type="checkbox"/>	<input checked="" type="checkbox"/>										
<input type="checkbox"/> selly@expertchoice.com	Facilitator	Evaluator	50%	Yes	100.0% (265/265)	4/19/2018, 11:47 ...	<input type="checkbox"/>		Female		<input type="checkbox"/>	<input type="checkbox"/>										
<input type="checkbox"/> Steve@expertchoice.com	Steve	Evaluator	50%	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Male		<input type="checkbox"/>	<input checked="" type="checkbox"/>										

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 Comparison 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 Comparison.

- **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:

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

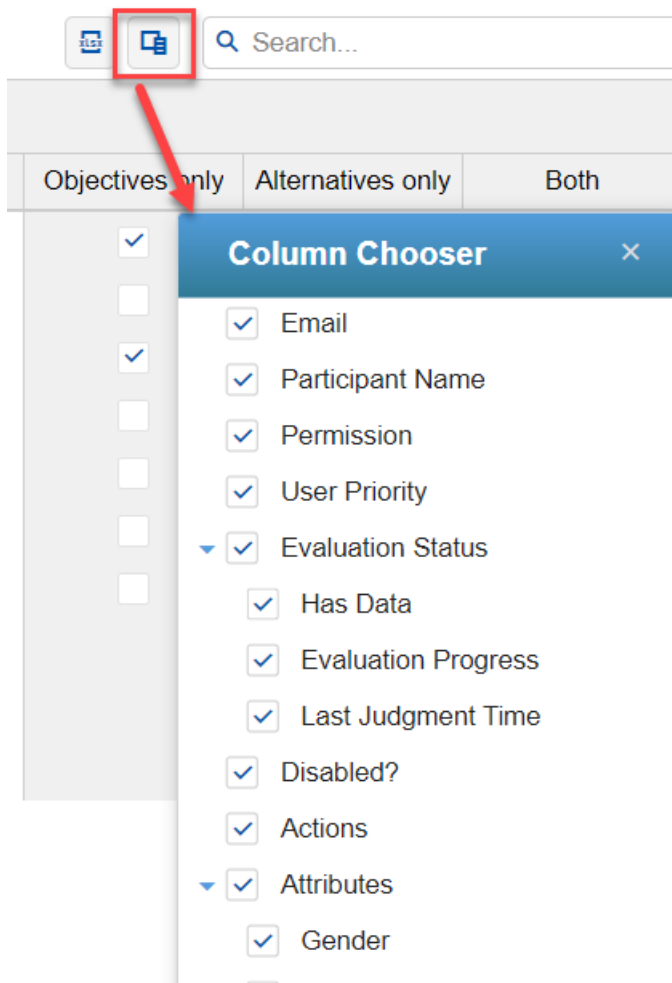
Groups				
C-Level Exec...	Efficiency Exp...	Objectives only	Alternatives only	Both
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **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.

You can hide or show columns using the column chooser:

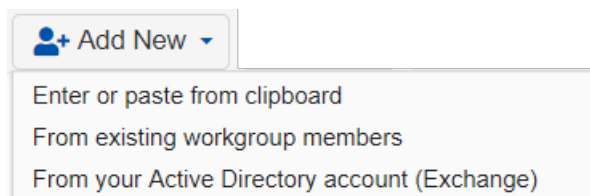


Click  to export the participants' grid in .xlsx format.

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

Sign up multiple participants

 **Paste from clipboard**

You can enter multiple participants, one per line, as follows: EmailAddress <space> Firstname <space> Lastname where, Firstname and Lastname are optional Remember to set the permission and options for generating a random password and sending a registration notification.

james@eci.com James
grace@eci.com Grace

All Participants added will be members of Group:
No Group  **Create Group**  **Remove Group**

Generate Random Password
 Send a registration notification to user

OK **Cancel**

a) Choose to enter one or more email addresses and corresponding participant names, or

b) Paste one or more email addresses/Names from the clipboard after placing this information on the clipboard from another source, such as an Excel spreadsheet, Word table, or Microsoft Outlook Contact Group.

NOTE: If you have a Microsoft Outlook Contact Group, you can place the names and email addresses in the Contact Group on the clipboard by composing an email to the group, expanding the group name to have the individual entries displayed, copying them to the clipboard, and discarding the email.

A participant can have a different name on each Comparison model that he/she belongs to. This is useful when the Project Manager wants to add an alias or role to the participant name (e.g Executive, Expert, etc.). The "Participant Workgroup Name" is the name displayed at the top right when the participant is logged in on Comparison. The "Participant Workgroup Name," if available, will be automatically assigned as the "Participant Model Name" when the name is not specified when adding the participant to the model.

Options include:

- Adding participant as a member of a group. The roles assigned to the new users will be determined by the roles assigned to "All Participants" as well as the group to which they are made a member. Note that participants added via invitations with access code or meeting ID will also be assigned to the selected group. The default group for general links can be defined from the Invite Participants page. By default, participants will be added to the "No Group." The participant is added to the default group that is currently set at the time he/she accesses the invite link. You can also add or remove groups from this screen.
- Generating a random password, and
- Sending a registration notification to new participants. Note: Some mail spam filters may block the reception of such notifications.

2. From existing workgroup members

A dialog box will appear in which you can select from a list of participants in the Workgroup.

3. From your Active Directory account (Exchange)

Applicable only if your site organization has a Microsoft Exchange Active Directory that is accessible via the Internet. You may have to ask your IT administrator if this is the case and request a login name and password.

After entering the **LDAP** (Lightweight Directory Access Protocol) Server URL, **Username**, and **Password**, and click Connect.

EDIT PARTICIPANT NAME

You can edit the participant's model name in **DEFINE MODEL > Define Participants & Roles > Participants** screen.

A participant can have a different name on each Comparison model he/she belongs to. This is useful when the Project Manager wants to add an alias or role to the participant name (e.g Executive, Expert, etc.). The "Participant Workgroup Name" is the name displayed at the top right when the participant is logged in on Comparison. The "Participant Workgroup Name," if available, will be automatically assigned as the "Participant Model Name" if the name is not specified when adding the participant to the model.

If you want to edit the participant model name, simply click on the name of the participant you want to modify, do your changes, and then press Enter to save.

Add New ▾
 Edit ▾
 Set Permissions ▾
 Remove ▾
 Manage Groups
 Manage Attributes

Participants

<input type="checkbox"/>	Email	↑	Participant Name	Permission
<input type="checkbox"/>	Dave@expertchoice.com		Dave	Evaluator
<input type="checkbox"/>	j.doe@eci.com		John Doe	Project Manager
<input type="checkbox"/>	Kris@expertchoice.com		Kris	Evaluator
<input type="checkbox"/>	Marcia@expertchoice.com		Marcia	Evaluator
<input type="checkbox"/>	Pete@expertchoice.com		Pete	Evaluator
<input type="checkbox"/>	selly@expertchoice.com		Facilitator	Evaluator
<input type="checkbox"/>	Steve@expertchoice.com		Steve	Evaluator

Note: Email addresses are unique identifiers and cannot be modified.

PARTICIPANTS LIST ACTIONS (RESET PASSWORD, GET LINK ETC.)

There are four icons under the Actions column of the Participants table:

MANAGE MODELS DEFINE MODEL COLLECT INPUT SYNTHESIZE ALLOCATE DASHBOARDS REPORTS

Add New Edit Set Permissions Remove Manage Groups Manage Attributes Send Mail

Participants

Email	Participant Name	Permission	Evaluation Status			Refresh	Disabled?	Actions
			Has Data	Evaluation Prog...	Last Judgment Ti...			
<input type="checkbox"/> Dave@expertchoice.com	Dave	Evaluator	Yes	87.9% (233/265)	4/19/2018, 9:18 PM	<input type="checkbox"/>		
<input type="checkbox"/> j.doe@eci.com	John Doe	Project Manager		0.0% (0/265)		<input type="checkbox"/>		
<input type="checkbox"/> Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		
<input type="checkbox"/> Marcia@expertchoice.com	Marcia	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		
<input type="checkbox"/> Pete@expertchoice.com	Pete	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		
<input type="checkbox"/> selly@expertchoice.com	Facilitator	Evaluator	Yes	100.0% (265/265)	4/19/2018, 11:47 ...	<input type="checkbox"/>		
<input type="checkbox"/> Steve@expertchoice.com	Steve	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		

- Reset Password** sets or resets the password for the participant. Gold key icon indicates that the user has a password, blue key icon means user has no password. You can see other options for resetting passwords here.
- Copy the evaluator's anytime link** on the clipboard
- Log out and log back in** with another user's anytime link
- 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.

MANAGE MODELS DEFINE MODEL COLLECT INPUT SYNTHESIZE ALLOCATE DASHBOARDS REPORTS

Add New Edit Set Permissions Remove Manage Groups Manage Attributes Send Mail

Remove selected participants
Remove all participants who have not...
Remove all participants who have no...

Participants

Email	Participant Name	Permission	Evaluation Status			Refresh	Disabled?	Actions	Attributes
			Has Data	Evaluation Prog...	Last Judgment Ti...				Gender
<input type="checkbox"/> Dave@expertchoice.com	Dave	Evaluator	Yes	87.9% (233/265)	4/19/2018, 9:18 PM	<input type="checkbox"/>		Male	
<input type="checkbox"/> j.doe@eci.com	John Doe	Project Manager		0.0% (0/265)		<input type="checkbox"/>		Male	
<input checked="" type="checkbox"/> Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Female	
<input type="checkbox"/> Marcia@expertchoice.com	Marcia	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Female	
<input type="checkbox"/> Pete@expertchoice.com	Pete	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Male	
<input type="checkbox"/> selly@expertchoice.com	Facilitator	Evaluator	Yes	100.0% (265/265)	4/19/2018, 11:47 ...	<input type="checkbox"/>		Female	
<input type="checkbox"/> Steve@expertchoice.com	Steve	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Male	

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.

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

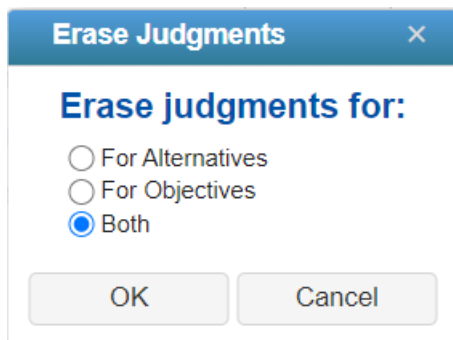
ERASE PARTICIPANT'S JUDGMENTS

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.

<input type="checkbox"/>	Email	Participant Name	Permission	Evaluation Status	
				Has Data	Evaluation Pro
<input type="checkbox"/>	Dave@expertchoice.com	Dave	Evaluator	Yes	87.9% (233/26)
<input type="checkbox"/>	j.doe@eci.com	John Doe	Project Manager		0.0% (0/265)
<input checked="" type="checkbox"/>	Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/26)
<input type="checkbox"/>	Marcia@expertchoice....	Marcia	Evaluator	Yes	87.9% (233/26)
<input type="checkbox"/>	Pete@expertchoice.com	Pete	Evaluator	Yes	87.9% (233/26)
<input type="checkbox"/>	selly@expertchoice.com	Facilitator	Evaluator	Yes	100.0% (265/2)
<input type="checkbox"/>	Steve@expertchoice.com	Steve	Evaluator	Yes	87.9% (233/26)

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



USER PRIORITIES (WEIGHTS)

Expert Choice Comparison® Help Document

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:

User Priority	Evaluation Status			Disabled?	Actions	Attributes
	Has Data	Evaluation Prog...	Last Judgment Ti...			
50%	Yes	87.9% (233/265)	4/19/2018, 9:18 PM			
50%		0.0% (0/265)				
50%	Yes	87.9% (233/265)	3/30/2016, 2:14 AM			
50%	Yes	87.9% (233/265)	3/30/2016, 2:14 AM			
50%	Yes	87.9% (233/265)	3/30/2016, 2:14 AM			
50%	Yes	100.0% (265/265)	4/19/2018, 11:47 ...			
50%	Yes	87.9% (233/265)	3/30/2016, 2:14 AM			

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.

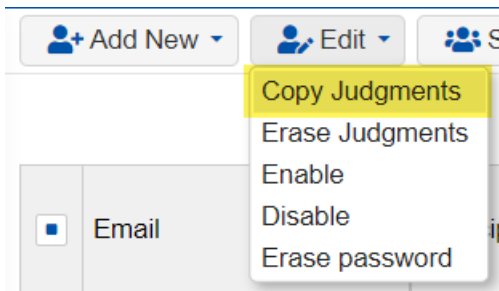
You can specify to see results with or without participant priorities when viewing results in the Synthesize screens, by clicking the User Priorities check box in Advanced mode.

User Priorities

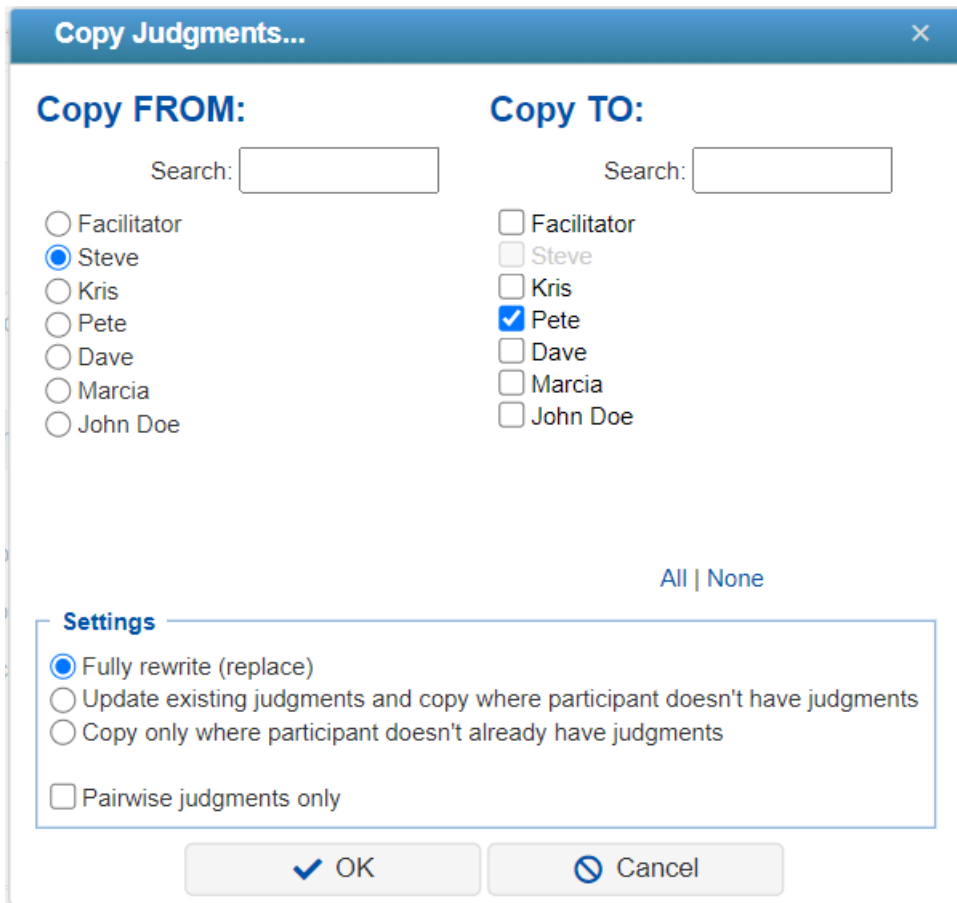
COPY JUDGMENTS TO SELECTED PARTICIPANTS

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:



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.

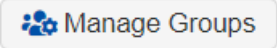
Expert Choice Comparison® Help Document

Participant Groups can be used when:

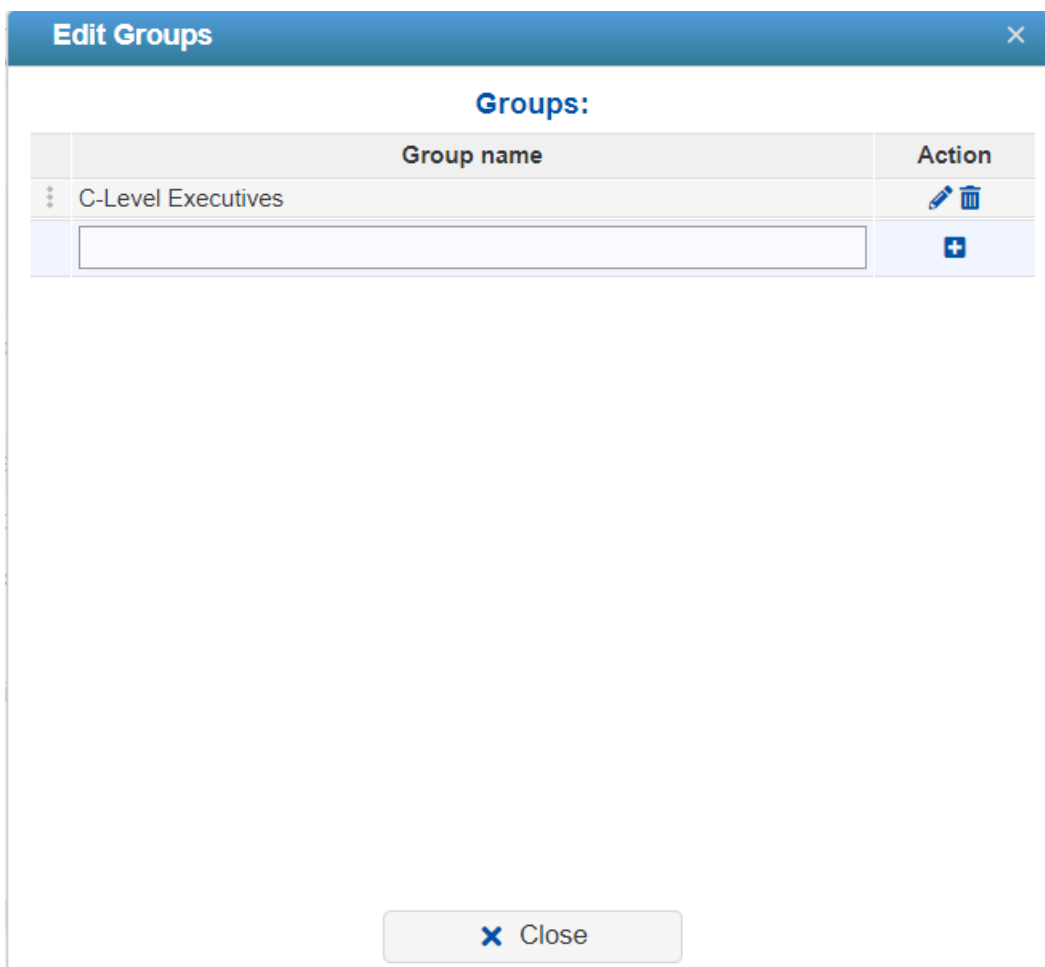
- [Setting up roles and](#)
- [Displaying results](#)

Participant Groups can be:

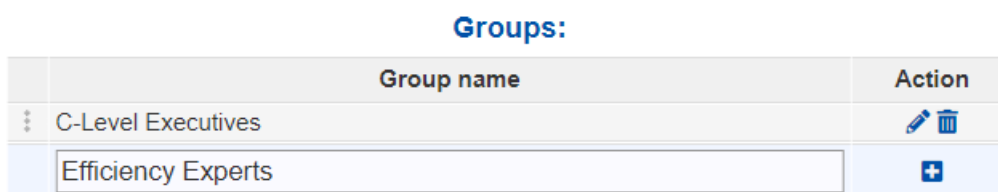
- **Dynamic** - in which membership is determined based on the **Participant attributes**.
- **Non-dynamic** - membership is manually assigned by the Project Manager, or as specified when getting the AnyTime General Invitation link.

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:



Groups are displayed as columns on the Participants table.

Participants										Search...	
	Email	Participant Name	Permission	Evaluation Status <input type="button" value="Refresh"/>			Disabled?	Actions	Groups		
				Has Data	Evaluation Progress	Last Judgment Time			C-Level Exec...	Efficiency Exp...	
<input type="checkbox"/>	Dave@expertchoice.com	Dave	Evaluator	Yes	87.9% (233/265)	4/19/2018, 9:18 PM	<input type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="refresh"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	j.doe@eci.com	John Doe	Project Manager		0.0% (0/265)			<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="refresh"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="refresh"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Marcia@expertchoice.com	Marcia	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="refresh"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Pete@expertchoice.com	Pete	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="refresh"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	selly@expertchoice.com	Facilitator	Evaluator	Yes	100.0% (265/265)	4/19/2018, 11:47 PM	<input type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="refresh"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Steve@expertchoice.com	Steve	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="refresh"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Groups added from the Manage Groups window have **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 the [Participants 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:

- Create Dynamic Groups,
- Filter Alternatives in the Synthesize Results pages.

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.

MANAGE MODELS DEFINE MODEL COLLECT INPUT SYNTHESIZE ALLOCATE DASHBOARDS REPORTS									
Add New Edit Set Permissions Remove Manage Groups Manage Attributes Send Mail									
Participants									
Email	Participant Name	Permission	Evaluation Status			Disabled?	Actions	Groups	
			Has Data	Evaluation Progress	Last Judgment Time				
<input type="checkbox"/> Dave@expertchoice.com	Dave	Evaluator	Yes	87.9% (233/265)	4/19/2018, 9:18 PM	<input type="checkbox"/>			
<input type="checkbox"/> j.doe@eci.com	John Doe	Project Manager		0.0% (0/265)		<input type="checkbox"/>			
<input type="checkbox"/> Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>			
<input type="checkbox"/> Marcia@expertchoice.com	Marcia	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>			
<input type="checkbox"/> Pete@expertchoice.com	Pete	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>			
<input type="checkbox"/> selly@expertchoice.com	Facilitator	Evaluator	Yes	100.0% (265/265)	4/19/2018, 11:47 PM	<input type="checkbox"/>			
<input type="checkbox"/> Steve@expertchoice.com	Steve	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>			

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.

Email	Participant Name	Permission	Evaluation Status			Disabled?	Actions	Attributes
			Has Data	Evaluation Progress	Last Judgment Time			Department
<input type="checkbox"/> Dave@expertchoice.com	Dave	Evaluator	Yes	87.9% (233/265)	4/19/2018, 9:18 PM	<input type="checkbox"/>		Marketing
<input type="checkbox"/> j.doe@eci.com	John Doe	Project Manager		0.0% (0/265)		<input type="checkbox"/>		Marketing
<input type="checkbox"/> Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Management
<input type="checkbox"/> Marcia@expertchoice.com	Marcia	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Marketing
<input type="checkbox"/> Pete@expertchoice.com	Pete	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Marketing

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 answers to the linked insight question.

MANAGE MODELS DEFINE MODEL COLLECT INPUT SYNTHESIZE ALLOCATE DASHBOARDS REPORTS									
Add New Edit Set Permissions Remove Manage Groups Manage Attributes Send Mail									
Participants									
Email	Participant Name	Permission	Evaluation Status			Disabled?	Actions	Attributes	Groups
			Has Data	Evaluation Progress	Last Judgment Time			Department	
<input type="checkbox"/> Dave@expertchoice.com	Dave	Evaluator	Yes	87.9% (233/265)	4/19/2018, 9:18 PM	<input type="checkbox"/>		IT	
<input type="checkbox"/> j.doe@eci.com	John Doe	Project Manager		0.0% (0/265)		<input type="checkbox"/>		Finance	
<input type="checkbox"/> Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Management	
<input type="checkbox"/> Marcia@expertchoice.com	Marcia	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Operations	
<input type="checkbox"/> Pete@expertchoice.com	Pete	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		IT	
<input type="checkbox"/> selly@expertchoice.com	Facilitator	Evaluator	Yes	100.0% (265/265)	4/19/2018, 11:47 PM	<input type="checkbox"/>		Marketing	
<input type="checkbox"/> Steve@expertchoice.com	Steve	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>		Marketing	

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

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 create [Dynamic 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 the [participant 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:

Filter by participant attributes and create dynamic groups

AND   

Email Address	Participant Name	Department
selly@expertchoice.com	Facilitator	Finance
Steve@expertchoice.com	Steve	Operations
Kris@expertchoice.com	Kris	Operations
Pete@expertchoice.com	Pete	IT
Dave@expertchoice.com	Dave	IT
Marcia@expertchoice.com	Marcia	Marketing
j.doe@eci.com	John Doe	Finance

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:

AND   

 Department Equal


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:




Equal


- Contains
- Equal
- Not Equal
- Starts With

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

Click  to see the filtered list.

Filter by participant attributes and create dynamic groups

AND   

 Department Equal

Email Address	Participant Name	Department
Pete@expertchoice.com	Pete	IT
Dave@expertchoice.com	Dave	IT

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."

Create Group

Group name:

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.

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

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 a Participant Attribute from an Insight Question.

For example, we have an insight question:

What do you want to evaluate?

Objectives only

Alternatives only

Both

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.

Participants									
MANAGE MODELS DEFINE PROJECT COLLECT INPUT SYNTHESIZE ALLOCATE REPORTS									
Add New Edit Set Permissions Remove Attributes Groups Priorities Send Mail									
Search...									
<input type="checkbox"/>	Email	Participant ... ↑	Permission	Has Data	Last Judgment Time	Disabled?	Actions	Attributes	Groups
								Department	IT Group
<input type="checkbox"/>	user_c1ad25db@ec...	Dave	Evaluator	Yes	8/13/2019 2:55:44 AM	<input type="checkbox"/>		Operations	<input type="checkbox"/>
<input type="checkbox"/>	user_780ecdf6@ec...	Facilitator	Evaluator	Yes	9/23/2019 5:29:35 AM	<input type="checkbox"/>		Finance	<input type="checkbox"/>
<input type="checkbox"/>	j.doe@eci.com	John Doe	Project Manager	Yes	8/23/2019 5:07:11 AM	<input type="checkbox"/>		Management	<input type="checkbox"/>
<input type="checkbox"/>	user_f01c7c6c@ec.c...	Kris	Evaluator	Yes	9/23/2019 5:29:15 AM	<input type="checkbox"/>		IT	<input checked="" type="checkbox"/>
<input type="checkbox"/>	user_ebedeca4@ec...	Marcia	Evaluator	Yes	8/13/2019 2:55:44 AM	<input type="checkbox"/>		IT	<input checked="" type="checkbox"/>
<input type="checkbox"/>	user_36498ffa@ec.c...	Pete	Evaluator	Yes	8/13/2019 2:55:44 AM	<input type="checkbox"/>		Marketing	<input type="checkbox"/>
<input type="checkbox"/>	user_fd8fdac3@ec.c...	Steve	Evaluator	Yes	8/13/2019 2:55:44 AM	<input type="checkbox"/>		Operations	<input type="checkbox"/>
<input type="checkbox"/>	user_def8f43a@ec.c...	User def8f43a	Evaluator	Yes	8/13/2019 2:55:44 AM	<input type="checkbox"/>		Marketing	<input type="checkbox"/>

From above, a participant attribute named "EvaluateWhat" 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 by [setting 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).

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**.

Email	Participant Name	Permission	Evaluation Status		
			Has Data	Evaluation Progress	Last Judgment Time
<input type="checkbox"/> Dave@expertchoice.com	Dave	Evaluator	Yes	87.9% (233/265)	4/19/2018, 9:18 PM
<input type="checkbox"/> j.doe@eci.com	John Doe	Project Manager		0.0% (0/265)	
<input type="checkbox"/> Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM
<input type="checkbox"/> Marcia@expertchoice.com	Marcia	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM
<input type="checkbox"/> Pete@expertchoice.com	Pete	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM
<input type="checkbox"/> selly@expertchoice.com	Facilitator	Evaluator	Yes	100.0% (265/265)	4/19/2018, 11:47 PM
<input type="checkbox"/> Steve@expertchoice.com	Steve	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM

- 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	

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:

MANAGE MODELS								DEFINE MODEL	COLLECT INPUT	SYNTHESIZE	ALLOCATE	DASHBOARDS	REPORTS	Reload
Add New		Edit		Set Permissions		Remove		Manage Groups		Manage Attributes		Send Mail		
Participants								Refresh		Search...				
Email	Participant Name	Permission	Evaluation Status			Disabled?								
			Has Data	Evaluation Progress	Last Judgment Time									
<input type="checkbox"/> Dave@expertchoice.com	Dave	Evaluator	Yes	87.9% (233/265)	4/19/2018, 9:18 PM	<input type="checkbox"/>								
<input type="checkbox"/> j.doe@eci.com	John Doe	Project Manager		0.0% (0/265)		<input type="checkbox"/>								
<input type="checkbox"/> Kris@expertchoice.com	Kris	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>								
<input type="checkbox"/> Marcia@expertchoice.com	Marcia	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>								
<input type="checkbox"/> Pete@expertchoice.com	Pete	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>								
<input type="checkbox"/> selly@expertchoice.com	Facilitator	Evaluator	Yes	100.0% (265/265)	4/19/2018, 11:47 PM	<input type="checkbox"/>								
<input type="checkbox"/> Steve@expertchoice.com	Steve	Evaluator	Yes	87.9% (233/265)	3/30/2016, 2:14 AM	<input type="checkbox"/>								

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.