

Invite Participants to AnyTime Evaluation

Send AnyTime Invitations Overview

Comparison has several ways to invite participants to an anytime evaluation -- both for unregistered participants as well as those already registered in the model.

The screenshot shows the 'Send Email(s)' interface with the following data:

NAME	E-mail	Has Data	Progress
Facilitator	selly@expertchoice.com	Yes	99.6%
Steve	steve@expertchoice.com	Yes	87.8%
Kris	kris@expertchoice.com	Yes	87.8%
Pete	pete@expertchoice.com	Yes	87.8%
Dave	dave@expertchoice.com	Yes	87.8%
Marcia	marcia@expertchoice.com	Yes	87.8%
John Doe	j.doe@eci.com	No	0.0%

The email body text is: Dear John Doe, Please join our Comparison® evaluation session for decision: IT Portfolio Optimization. Please click the following link to start your evaluation (A hyperlink customized for each participant will appear HERE when the 'Send Invite' button is pressed) If you need additional help, please email j.doe@eci.com. Sincerely, John Doe This is an automatically generated email, please do not reply.

Responsive or Non-responsive Evaluation pages

AnyTime evaluation pages can be Responsive or Non-responsive.

In general, responsive Evaluation allows you to automatically adjust the content and layout of the page to accommodate a variety of devices and window or screen size.

To generate responsive invitation links, simply check the Use Responsive UI Links checkbox.

By design, responsive links simply add "r-" on the non-responsive links.

For example, if the invite link for non-responsive is: <https://comparison.expertchoice.com?hash=abcde>, then the responsive invitation link would be <https://r-comparison.expertchoice.com?hash=abcde>

Learn more on [Responsive vs Non-responsive pages](#)

There are four tabs for inviting participants, each with a different purpose.

The tabs are: Send Email(s), General Link, Participant Specific Links, and Group Specific Links.

Send Email(s)

This option is used to select one or more **participants already registered** in the model, and then to have Comparison or your Local email client send an email to each of the selected participants.

General Link

The General Link tab provides a hyperlink and/or invite instructions that can be used **both by registered and unregistered participants**.

 Learn more on Invite Participants using [General Links](#).

Participant Specific Links

The Participant Specific Links tab provides a (unique) link and email address generated for every **registered participant** in the model. The Project Manager can use these links in any way that they desire.

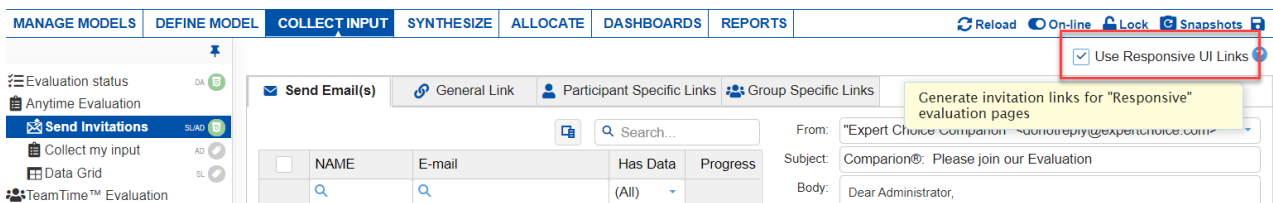
Group-Specific Links

The Group-Specific Links tab provides a link that will assign both **registered and unregistered** participants to a specific group.

Responsive vs. Non-responsive Evaluation pages

AnyTime evaluation pages can be **Responsive** or **Non-responsive**.

In general, Responsive Evaluation allows you to automatically adjust the content and layout of the page to accommodate a variety of devices and window or screen size.



To generate responsive invitation links, simply check the **Use Responsive UI Links** on the AnyTime Send Invitation screen.

See below for more comparisons between Responsive and Non-responsive evaluation:

Non-Responsive Page	Responsive Page
Works flawlessly for desktop or big screen devices. For smaller devices, some browsers have a built-in way to show non-responsive pages as "mobile view," but it still requires scrolling and zooming.	Designed to render the page content based on the user's screen size. Responsive layouts automatically adjust and adapt to any device screen size, whether it is a desktop, a laptop, a

Non-Responsive Page	tablet, or a mobile phone. Responsive Page
Features only available on non-responsive evaluation: <ul style="list-style-type: none"> • Edit welcome and thank you page • Evaluation Question Text to speech • Save Quick Help per cluster • Upload or Download Quick Help • Apply Question's wording to other clusters • Show information documents on overall results step • Insert Template (Variable) option on Evaluation Question 	Features only available on responsive evaluation: <ul style="list-style-type: none"> • Auto-resize information documents image • Signing up form (detect existing email and ask for password instead of fields previously selected on Invite participants screen)
Support anonymous and signing up user evaluation for models with insight questions that can change the evaluation steps (e.g., Alternatives/Objectives checklist, Questions linked to participants' attributes)	Does not support

Send AnyTime Invitation (from Comparison or Local Mail Client)

The **Send Email(s)** tab is one of the send invitation options for AnyTime Evaluation. It displays a participants list table as shown below where the Project Manager will select the participant/s that will receive the AnyTime invitation. You can add participants in the [Define Model > Participants](#) page by navigating through the menus or by simply clicking the **Add Participants** button below the table.





<input type="checkbox"/>	NAME ↓	E-mail	Has Data	Progress
	<input type="text" value="Q"/>	<input type="text" value="Q"/>	(All) ▾	
<input type="checkbox"/>	Steve	Steve@expertchoice.com	Yes	87.9%
<input type="checkbox"/>	Project Manager	z.bayta@eversun.ph	No	0.0%
<input type="checkbox"/>	Pete	Pete@expertchoice.com	Yes	87.9%
<input type="checkbox"/>	Marcia	Marcia@expertchoice.com	Yes	87.9%
<input type="checkbox"/>	Kris	Kris@expertchoice.com	Yes	87.9%
<input type="checkbox"/>	Facilitator	selly@expertchoice.com	Yes	99.6%
<input type="checkbox"/>	Dave	Dave@expertchoice.com	Yes	87.9%

A template for the email is also provided which can be edited to explain the purpose of the evaluation and provide any other information or hyperlinks that you want to convey to the evaluators.

Expert Choice Comparion® Help Document

From: "Expert Choice Comparion" <donotreply@expertchoice.com>

Subject: Comparion®: Please join our Evaluation

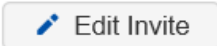


Body: Dear Project Manager,

Please join our Comparion® evaluation session for decision: IT Portfolio Optimization (5). Please click the following link to start your evaluation (A hyperlink customized for each participant will appear HERE when the 'Send Invite' button is pressed)

If you need additional help, please email z.bayta@eversun.ph.

Sincerely,
Project Manager

This is an automatically generated email, please do not reply.

You can edit the email Subject by typing on the Subject Field.

Clicking the **Edit Invite** button will open a [rich text editor](#) where you can edit the body of the invitation. You can add variables that Comparion will replace with the appropriate information as desired. After returning from editing you can then view what the email will look like.

Click the **Reset** button to reset the invitation to the default.

The **Send Invite** button is disabled until you select at least one participant from the left. You can select some or all of the participants to receive the email. You can also re-invite or remind participants if they are not making progress. You can select all participants without judgments or sort by the Evaluation Progress column and select those with a small percentage of judgments to re-invite or remind.

By default, the invitation email is being sent by Comparion; you can choose to send the invitation using your local mail client (e.g Outlook, Thunderbird, etc.) by selecting "Use Your Local Mail Client" under the "From:" field.

From: "Expert Choice Comparion" <donotreply@expertchoice.com>

Subject: "Expert Choice Comparion" <donotreply@expertchoice.com>
<Use Your Local Mail Client>

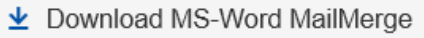
Body:

Note that using this option, you can only send invitations to one selected participant at a time. If you want to send to

Expert Choice Comparison® Help Document

multiple participants at once using your local mail client, you can use the Mail Merge option.

Simply select the participants you want to send the invitation to and then click the Download MS-MailMerge button at the bottom.

 A button with a downward arrow icon and the text "Download MS-Word MailMerge".

A .zip file will be downloaded; extracting the zip file will uncompress the ff:

- Your_Model_Name.docx - the MS mail merge file
- Your_Model_Name.mdb - MS database
- README.docx

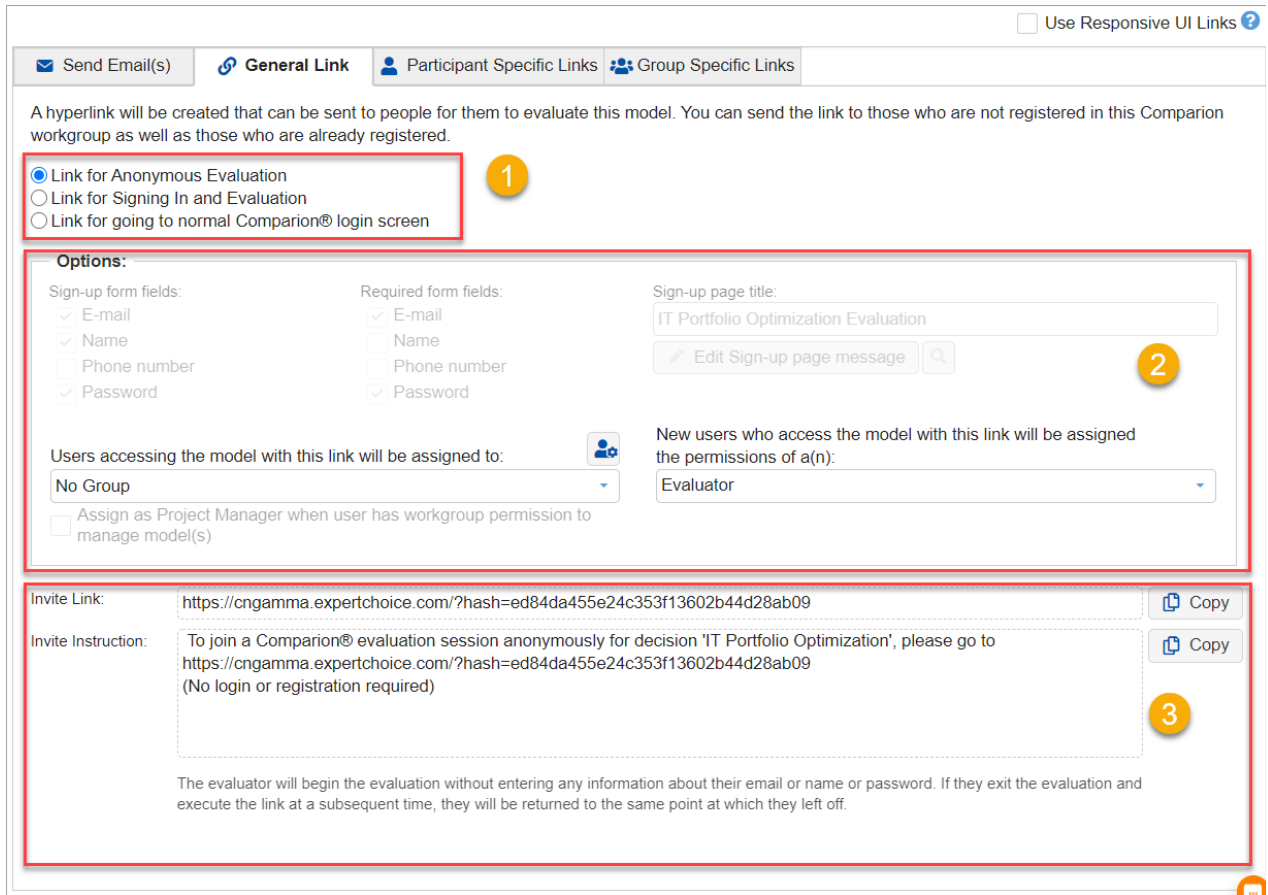
Read the README.docx for the instructions.

Invite Participants using General Links

The General Link tab provides a hyperlink and/or invitation instructions that can be used **both by registered and unregistered participants**.

The General Link page is divided into three sections:

- **General Link type** - Anonymous, Sign in and Evaluate, and Log in. These are explained in detail below.
- **Options** - Options can be enabled or disabled as applicable to the selected General Link type.
- **Invitation Link and Invitation Instruction** - where the invitation link and instructions based on the general link type and options specified are displayed. The Project Manager can copy and send the link/instruction via email, post it to a website, or transmit it via a chat window or any other communications mode. You can also see hint text below the invitation instruction explaining briefly how the link works.



There are three options for General Links:

- Link for Anonymous Evaluation
- Link for Signing In and Evaluation
- Link for going to normal Comparison® login screen


1. Link for Anonymous Evaluation

Generates a link that, when used, will allow the respondent to enter judgments anonymously. If they exit the evaluation and execute the link at a subsequent time, they will be returned to the same point at which they left off.

The options available for Anonymous Evaluation invitation are as follows:
(These options are also available for the Signing Up and Evaluation tab)

- **Group Assignment** - assigns the invited users to a specific participant group when executing the link.



By default, "No group" is selected, meaning they will not be assigned to any group. You can select a group, if available, by clicking on the drop-down. You can click the Manage Groups  icon to redirect you to the Add Participants screen and open the Manage Groups dialog box where you can add groups.

TIP: The invitation/instruction link section at the bottom has a generated link that is based on the currently selected group on the drop-down. If you want to get the links for all the existing groups at once, go to the fourth tab, **Group-Specific Links** tab lists, where you can copy/download the links.

- **Permission Assignment** - assign permission (Evaluator, Viewer, Evaluator/Viewer, and Project Manager) to non-registered participants when executing the link.

New users who access the model with this link will be assigned the permissions of a(n):

Evaluator

Evaluator

Viewer

Evaluator/Viewer

Project Manager

2. Link for Signing In and Evaluation

The Link for Signing In and Evaluation is applicable for **registered** and **non-registered** users. Executing the link will redirect the users to a page with two forms, where they can either sign up or log in:

IT Portfolio Optimization Evaluation

Please join our IT Portfolio Optimization Evaluation. For new users, please sign up using the form at the left. For registered users, use the login form at the right.

<p>New users login here:</p> <p>E-mail*: <input type="text"/></p> <p>Full name: <input type="text"/></p> <p>Password*: <input type="password"/></p> <p>Confirm password*: <input type="password"/></p> <p style="text-align: center;"><input type="button" value="Sign up"/></p>	<p>Existing user login:</p> <p>E-mail*: <input type="text"/></p> <p>Password: <input type="password"/></p> <p style="text-align: center;"><input type="button" value="Log in"/></p>
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In addition to the two options (Group and Permission Assignment) available for the Anonymous Evaluation described above, more options are available for Link for Signing In and Evaluation:

Options:

Sign-up form fields:	Required form fields:	Sign-up page title:
<input checked="" type="checkbox"/> E-mail	<input type="checkbox"/> E-mail	<input type="text"/>
<input checked="" type="checkbox"/> Name	<input type="checkbox"/> Name	<input type="button" value="Edit Sign-up page message"/> <input type="button" value="Q"/>
<input checked="" type="checkbox"/> Phone number	<input type="checkbox"/> Phone number	
<input checked="" type="checkbox"/> Password	<input type="checkbox"/> Password	

Users accessing the project with this link will be assigned to:

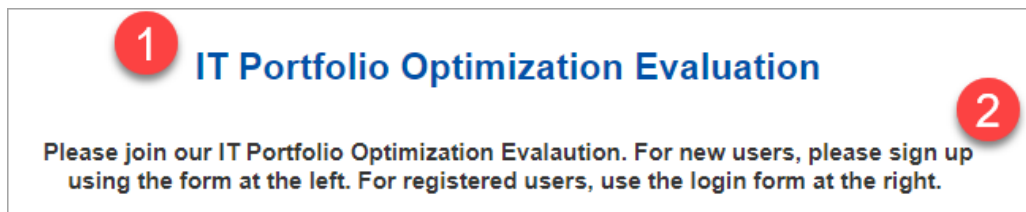
Assign as Project Manager when user has workgroup permission to manage project(s)

New users who access the project with this link will be assigned the permissions of a(n):

- **Sign-up form fields and required fields** - select the fields (E-mail, Name, Phone number, Password) to display for the non-registered users form when the link is executed and indicate if responses are required or not. At least one of the fields must be selected (checked) to appear.

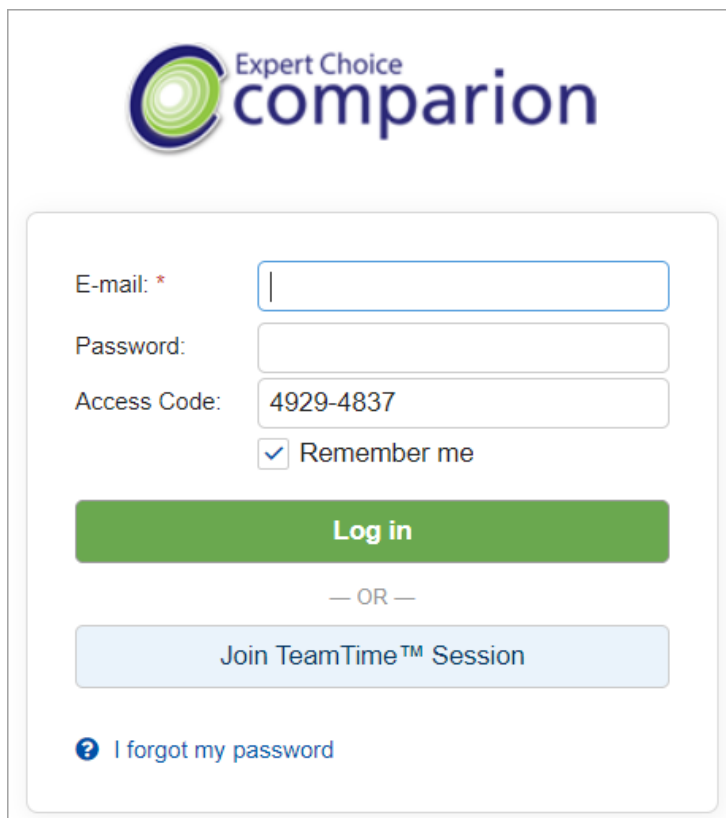
Note: You cannot specify a required password unless the email is required. If all selected fields are designated as optional (not required) and the user chooses to not enter any information, then the link functions the same as the anonymous evaluation.

- **Assign a Project Manager permission to the registered user** - if this option is checked, a registered user that has a Project Organizer Workgroup Permission will be a Project Manager of the model. (Note: A Workgroup Manager will always be a Project Manager of a model.)
- **Specify the signup page title and message** - this is the (1) heading and (2) custom message that will appear at the top of the signing up/login page.



3. Link for going to normal Comparion login screen

When executing the link generated from this option, the user will be taken to the normal Comparion login screen with an **access code** for this model. The registered user needs to provide his/her email and password, and click Log in.

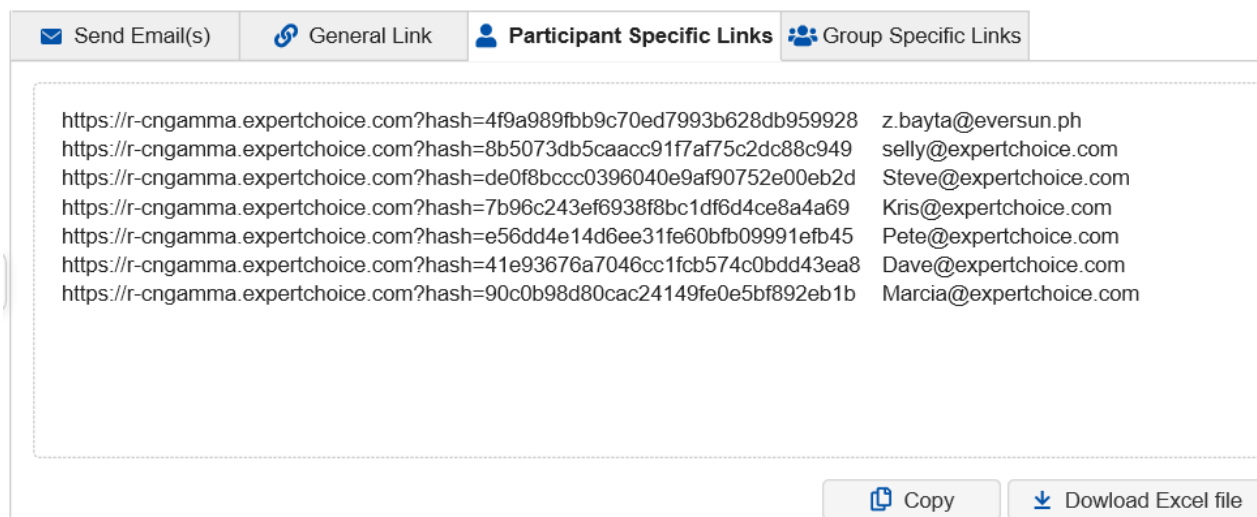


The login form for Expert Choice Comparison includes the following fields and elements:

- E-mail:** * [Input field]
- Password:** [Input field]
- Access Code:** 4929-4837 [Input field]
- Remember me
- Log in** [Green button]
- OR —
- Join TeamTime™ Session** [Light blue button]
- [I forgot my password](#) [Link with question mark icon]

Invite Participants using Participant Specific Links

The Participant Specific Links tab provides a (unique) link and email address generated for every **registered participant** in the model. The Project Manager can distribute these links to participants.



The interface shows a tabbed menu with the following options:

- Send Email(s)
- General Link
- Participant Specific Links** (Active)
- Group Specific Links

The main content area displays a list of unique links and email addresses:

https://r-cngamma.expertchoice.com?hash=4f9a989fbb9c70ed7993b628db959928	z.bayta@eversun.ph
https://r-cngamma.expertchoice.com?hash=8b5073db5caacc91f7af75c2dc88c949	selly@expertchoice.com
https://r-cngamma.expertchoice.com?hash=de0f8bccc0396040e9af90752e00eb2d	Steve@expertchoice.com
https://r-cngamma.expertchoice.com?hash=7b96c243ef6938f8bc1df6d4ce8a4a69	Kris@expertchoice.com
https://r-cngamma.expertchoice.com?hash=e56dd4e14d6ee31fe60bfb09991efb45	Pete@expertchoice.com
https://r-cngamma.expertchoice.com?hash=41e93676a7046cc1fcb574c0bdd43ea8	Dave@expertchoice.com
https://r-cngamma.expertchoice.com?hash=90c0b98d80cac24149fe0e5bf892eb1b	Marcia@expertchoice.com

At the bottom right, there are two buttons: **Copy** and **Download Excel file**.

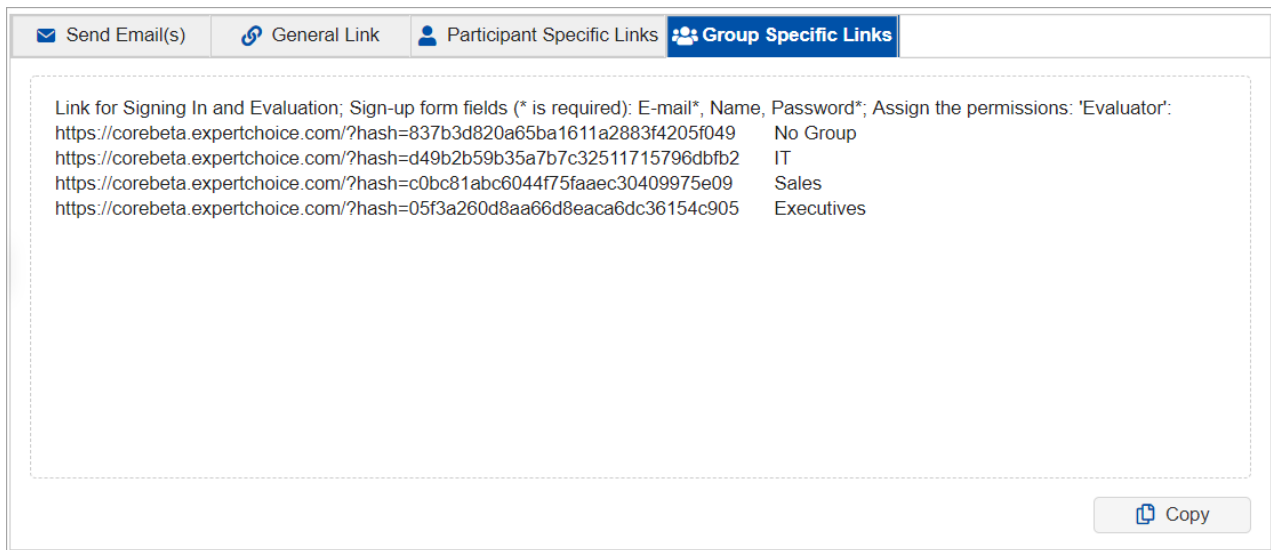
The Project Manager can copy the links and emails using the Copy button or download them to an Excel file.

Invite Participants using Group Specific links

The Group-Specific Links tab provides a link that will assign both **registered** and **unregistered** participants to a specific group.

In the General Link tab, you can only select a group and copy the invitation link one at a time. Here in the Groups-specific tab, we take into account the currently selected options from the General links tab (e.g., general link type, permission, etc.) and generate a link with those definitions for each existing participants group.

For example:



Link for Signing In and Evaluation; Sign-up form fields (* is required): E-mail*, Name, Password*; Assign the permissions: 'Evaluator':	
https://corebeta.expertchoice.com/?hash=837b3d820a65ba1611a2883f4205f049	No Group
https://corebeta.expertchoice.com/?hash=d49b2b59b35a7b7c32511715796dbfb2	IT
https://corebeta.expertchoice.com/?hash=c0bc81abc6044f75faaec30409975e09	Sales
https://corebeta.expertchoice.com/?hash=05f3a260d8aa66d8eaca6dc36154c905	Executives

The invitation link details are indicated in the first line as shown above. "Signing In and Evaluation" invite links with sign-up form fields: Email*, Name, and Password*, users will be assigned to an "Evaluator" permission.

Three invite links were generated. When a user executed the first link, s/he will be redirected to the "Signing in and Evaluation" page and will be not be assigned to any group after he/she signed up or logged in.

The second link will assign the users to the "Risk Experts" group, and the third to the "C-Level Executives" group.

Participants Groups can be added on **DEFINE MODEL > DEFINE PARTICIPANTS & ROLES > Participants groups** page. Each group has a unique link as shown below.