Send Invitations

Comparion has several ways to invite participants to an anytime evaluation -- both for unregistered participants as well as those already registered in the model. There are four tabs for inviting participants, each with a different purpose.

Send AnyTime Invitation (from Riskion or Local Mail Client)

Depending on the model you are working on, you can invite participants to AnyTime Evaluation on:

- **LIKELIHOOD OF EVENTS > MEASURE > AnyTime Evaluation > Send Invitations**
- **IMPACT OF EVENTS > MEASURE > AnyTime Evaluation > Send Invitations**

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 from the Identify/Structure > Identify > Participants page by navigating through the menus or by simply clicking the **Add Participants** button at the bottom of the table.

A template for the email is provided at the right 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.

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 Riskion will replace with the appropriate information as desired. After returning from editing you can then view what the email will look like.

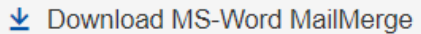Click the **Reset** button to reset the invitation to the default.

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 Riskion, you can choose to send the invitation using your local mail client (e.g Outlook, Thunderbird, etc.) by selecting "User Your Local Mail Client" under the "From:" field.

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

⬇ 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 (Anonymous, Signing in, Login)

Depending on the model you are working on, you can invite participants to AnyTime Evaluation on:

- **LIKELIHOOD OF EVENTS > MEASURE > AnyTime Evaluation > Send Invitations**
- **IMPACT OF EVENTS > MEASURE > AnyTime Evaluation > Send Invitations**

The General Link tab provides hyperlink and 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, Signing in and Evaluation and Log in, these are explained in detail below
- **Options** - Options can be enabled or disabled as applicable to the selected General Link type
- **Invite Link and Invite Instructions** - where the invite 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 vehicle. You can also see a hint text below the invite instruction explaining briefly how the link works.

There are three General Link types as shown by the radio buttons on this 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. Anonymous users will have dummy names and emails.

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

- **Group Assignment** - assign 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 dropdown. You can click the Manage Groups icon to redirect you to the Add Participants screen and open the Manage Groups modal where you can add groups.

> **TIP**: The invite/instruction link section at the bottom has a generated link that is based on the currently selected group on the dropdown. 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.

A Riskion model composes of Likelihood and Impact evaluation (and Control), an additional option can be found below the invitation instruction section:

- **Use invitation for both hierarchies (Likelihood and Impact)** - checking this option will indicate both the Likelihood and Impact invitation links on the Invite Instruction. Please note that this is only applicable if the Likelihood and Impact pipes are not joined as specified from the Evaluation Settings page.

This option is available for the three general links type.

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 user can either sign up or log in:

In addition to the options available for the Anonymous Evaluation described above, more options are available for Link for Signing In and Evaluation:

- **Sign-up form fields and required fields** - select the fields (E-mail, Name, Phone number, Password) that will be displayed 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.
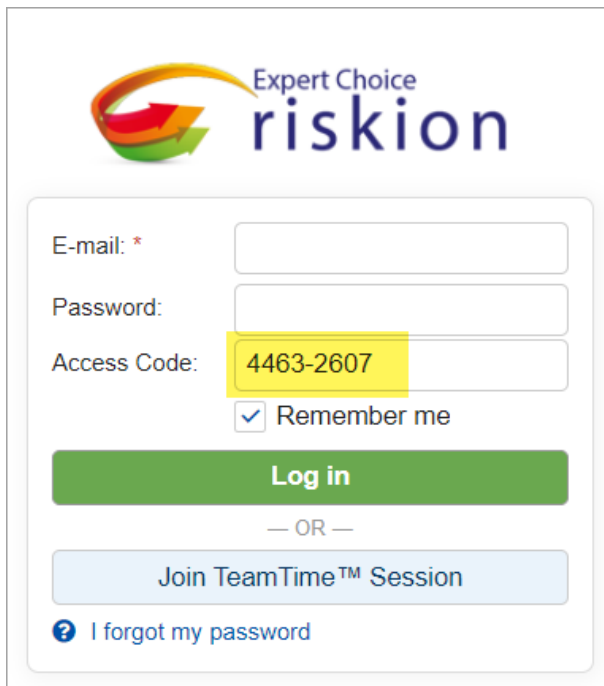
> **Note**: You cannot specify a required password unless the email is required. If all selected fields are designated as optional (not required) and the user chooses not to enter any information, then the link functions the same as the anonymous evaluation.

- **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. A default heading is provided in case you did not specify it, on the other hand, the custom message can be blank.

3. Link for going to normal Riskion login screen

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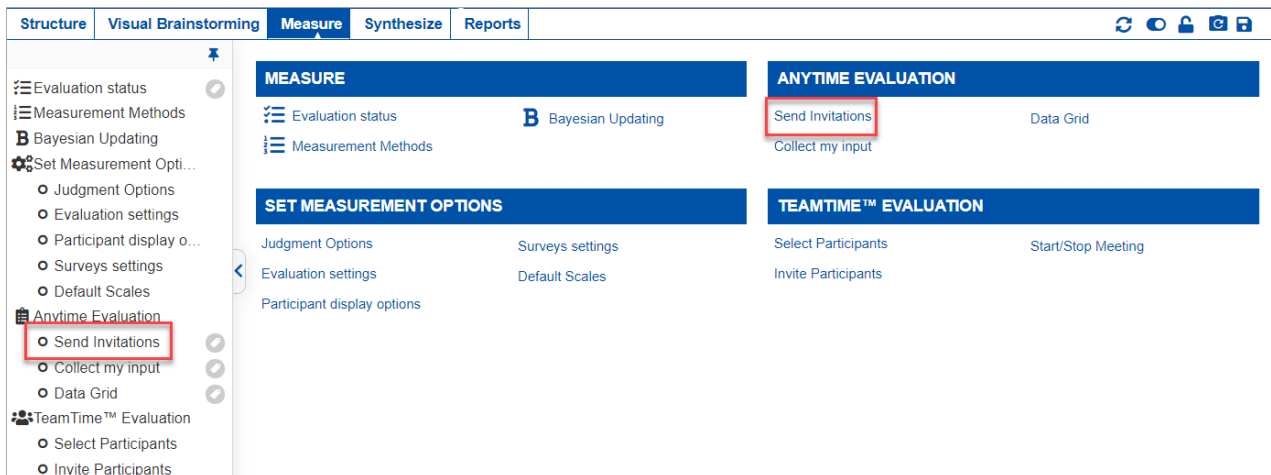
Invite Participants using Group Specific links

Depending on the model you are working on, you can get the Group-Specific Invite links on:

- **LIKELIHOOD > MEASURE > ANYTIME EVALUATION > Send Invitations** page
- **IMPACT > MEASURE > ANYTIME EVALUATION > Send Invitations** page:

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 groups.

For example:

The invitation link details are indicated at 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, he/she 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 from **IDENTIFY/STRUCTURE > IDENTIFY > Participants groups** page. Each group has a unique link as shown below.

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 use these links in any way that they desire.

| General Link | **Participant Specific Links** | Group Specific Links

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https://riskbeta.expertchoice.com?hash=1033703b8103ad1b611ef4b69fbcc41e j.doe@eci.com
https://riskbeta.expertchoice.com?hash=95b806c8a621056ad98a031853025678   expert@eci.com
https://riskbeta.expertchoice.com?hash=29d07349643ef6d55ee26626c3e4e018 Anonym-4463-2607_ednlsomq

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