

Send Invitations

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.

The screenshot shows the 'Send Email(s)' interface. At the top, there are tabs for 'Send Email(s)', 'General Link', 'Participant Specific Links', and 'Group Specific Links'. Below the tabs is a search bar and a table of participants. The table has columns for 'NAME', 'E-mail', 'Has Data', and 'Progress'. Below the table are buttons for 'Add Participants...', 'Download MS-Word MailMerge', 'Edit Invite', 'Reset', and 'Send Invite'. To the right of the table is an email composition area with fields for 'From:', 'Subject:', and 'Body:'. The 'From:' field is set to 'Expert Choice Comparison' <donotreply@expertchoice.com>. The 'Subject:' field is 'Riskion®: Please join our Evaluation'. The 'Body:' field contains a template email message.

<input type="checkbox"/>	NAME	E-mail	Has Data	Progress
<input type="checkbox"/>	System Manager	Admin	No	0.0%
<input type="checkbox"/>	Ernest Forman	forman@gwu.edu	Yes	100.0%
<input type="checkbox"/>	Ed Hreljac	ed.hreljac@processpower.ca	Yes	100.0%
<input type="checkbox"/>	Mike Jones	mjones@expertchoice.com	No	0.0%
<input type="checkbox"/>	Vijay Gupta	vijaygupta2607@gmail.com	No	0.0%
<input type="checkbox"/>	John Doe	j.doe@eci.com	No	0.0%
<input type="checkbox"/>	Risk Expert	expert@eci.com	No	0.0%

From: "Expert Choice Comparison" <donotreply@expertchoice.com>
Subject: Riskion®: Please join our Evaluation
Body: Dear System Manager,
Please join our Riskion® assessment for risk event Impacts in the model: DHS Border Security example with controls
by clicking in the following link:
(A hyperlink customized for each participant will appear HERE when the 'Send Invite' button is pressed)
If you need additional help, please email Admin.
Thank you,
System Manager
This is an automatically generated email, please do not reply.

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.

 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 (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.

Send Email(s)
 General Link
 Participant Specific Links
 Group Specific Links

A hyperlink will be created that can be sent to people for them to evaluate this model. You can send the link to those who are not registered in this Comparison workgroup as well as those who are already registered.

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

Options:

Sign-up form fields:
 E-mail
 Name
 Phone number
 Password

Required form fields:
 E-mail
 Name
 Phone number
 Password

Sign-up page title: _____

Edit Sign-up page message

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

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

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

 Evaluator

Invite Link: <https://riskbeta.expertchoice.com/?hash=8a7e4c0645ff6f688bd520e2b95bfc86>

Invite Instruction:

 To join a Riskion® evaluation anonymously in the model 'DHS Border Security example with controls', please go to <https://riskbeta.expertchoice.com/?hash=132daf99df71f4fb6b1eb6b1a876b18c> for the Likelihood evaluation, and then go to <https://riskbeta.expertchoice.com/?hash=8a7e4c0645ff6f688bd520e2b95bfc86> for the Impact evaluation. (No login or registration required)

Use invitations for both hierarchies (Likelihood, Impact)

Please note: Regular evaluation pipes in this model (not joined). [\[Change options\]](#)

The evaluator will begin the evaluation without entering any information about their email or name or password. 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.

There are three General Link types as shown by the radio buttons on this screen.

Link for Anonymous Evaluation
 Link for Signing In and Evaluation
 Link for going to normal Riskion® 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. Anonymous users will have dummy names and emails.

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

Options:

Sign-up form fields: <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> Name <input type="checkbox"/> Phone number <input checked="" type="checkbox"/> Password	Required form fields: <input checked="" type="checkbox"/> E-mail <input type="checkbox"/> Name <input type="checkbox"/> Phone number <input checked="" type="checkbox"/> Password	Sign-up page title: <input type="text"/> <input type="button" value="Edit Sign-up page message"/>
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Users accessing the model with this link will be assigned to: 

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

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

Invite Link:

Invite Instruction:


Use invitations for both hierarchies (Likelihood, Impact)
Please note: Regular evaluation pipes in this model (not joined). [\[Change options\]](#)

The evaluator will begin the evaluation without entering any information about their email or name or password. 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, 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.

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

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.

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

Evaluator

Evaluator

Viewer

Evaluator/Viewer

Project Manager

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](#).

Invite Instruction: To join a Riskion® evaluation in the model 'DHS Border Security example with controls', please do the following:

1. Go to <https://riskbeta.expertchoice.com/?passcode=4463-2607> for the Likelihood evaluation
2. Enter your email address and your password to login
3. Click on "Log in"
4. After finishing the Likelihood evaluation, go to <https://riskbeta.expertchoice.com/?passcode=5384-0367> for the Impact evaluation

Use invitations for both hierarchies (Likelihood, Impact)

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:

DHS Border Security

Please join our Risk Assessment. For new users, please sign up using the form at the left. For registered users, use the login form at the right.

<p style="text-align: center; color: #0056b3;">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; margin-top: 10px;"><input type="button" value="Sign up"/></p>	<p style="text-align: center; color: #0056b3;">Existing user login:</p> <p>E-mail*: <input type="text"/></p> <p>Password: <input type="password"/></p> <p style="text-align: center; margin-top: 10px;"><input type="button" value="Log in"/></p>
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In addition to the options available for the Anonymous Evaluation described above, more options are available for Link for Signing In and Evaluation:

Options:

<p>Sign-up form fields:</p> <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> Name <input type="checkbox"/> Phone number <input checked="" type="checkbox"/> Password	<p>Required form fields:</p> <input checked="" type="checkbox"/> E-mail <input type="checkbox"/> Name <input type="checkbox"/> Phone number <input checked="" type="checkbox"/> Password	<p>Sign-up page title:</p> <input type="text"/> <input type="button" value="Edit Sign-up page message"/> <input type="button" value="Q"/>
<p>Users accessing the model with this link will be assigned to:</p> <input type="button" value="User icon"/> <input type="text" value="No Group"/>	<p>Assign as Project Manager when user has workgroup permission to manage model(s)</p> <input type="checkbox"/>	<p>New users who access the model with this link will be assigned the permissions of a(n):</p> <input type="text" value="Evaluator"/>

- **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.



E-mail: *

Password:

Access Code:

Remember me

[Log in](#)

— OR —

[Join TeamTime™ Session](#)

[? I forgot my password](#)

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.

Send Email(s)	General Link	Participant Specific Links	Group Specific Links
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https://riskbeta.expertchoice.com?hash=0d5cd31a81797958a367eb3ebb1389e5    mjones@expertchoice.com
https://riskbeta.expertchoice.com?hash=4c68213a38d3830fda2d2f3e3bc83959    vijaygupta2607@gmail.com
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

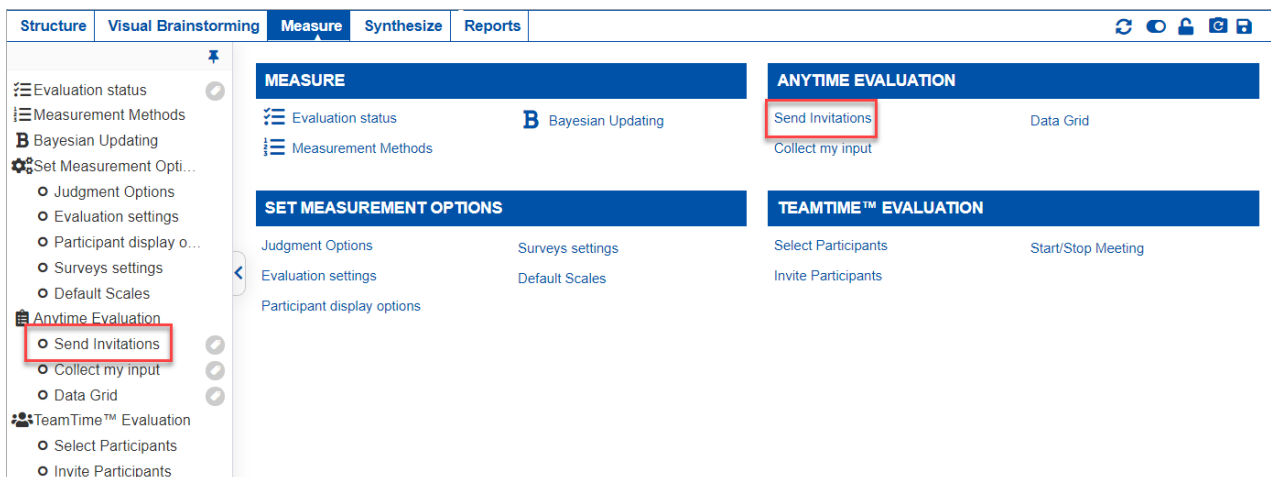
```

Copy
 Download Excel file

Invite Participants using Group Specific links

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

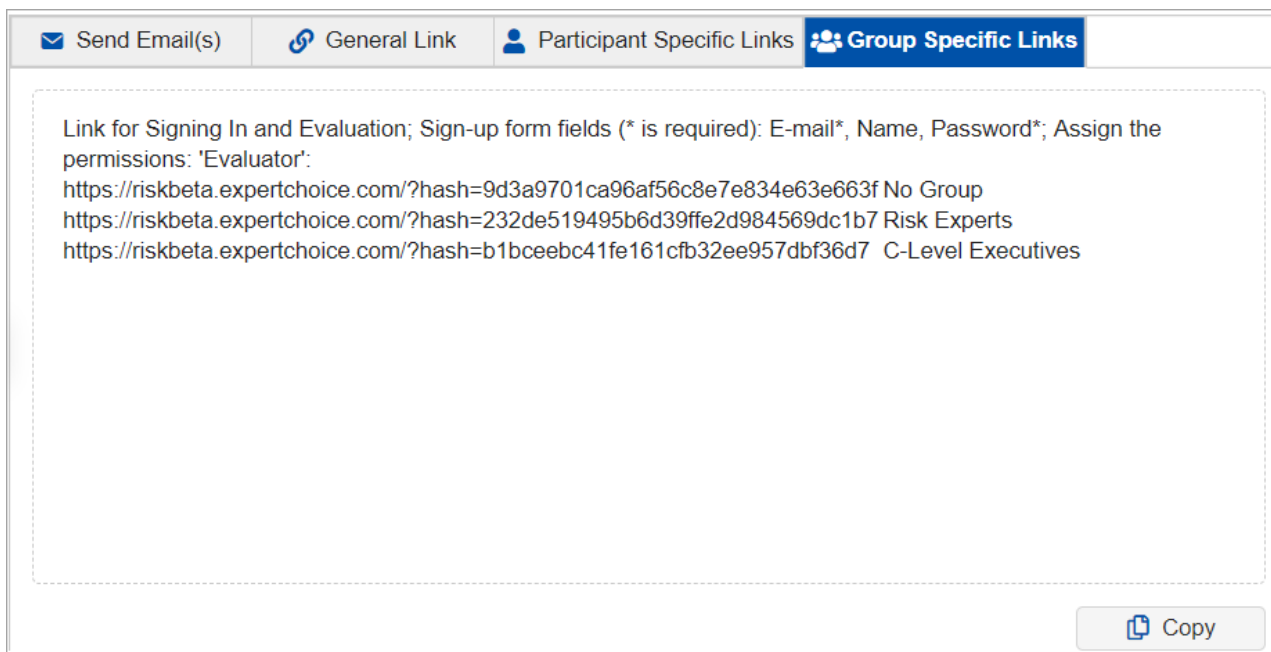
- **LIKELIHOOD > MEASURE > ANYTIME EVALUATION > Send Invitations** page
- **IMPACT > MEASURE > ANYTIME EVALUATION > Send Invitations** page:



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.
