Team Mapping Tool - Guide

Helps with Team Mapping Tool setup, and Member management
Revision: 20-Aug-2019

Contents

Purpose of the Document

This document provides instructions on how to access, configure and update the Team Mapping tool.

- Section **Team Leaders/Administrators access** is intended for Team Leaders / Administrators to understand how to properly set up your team.

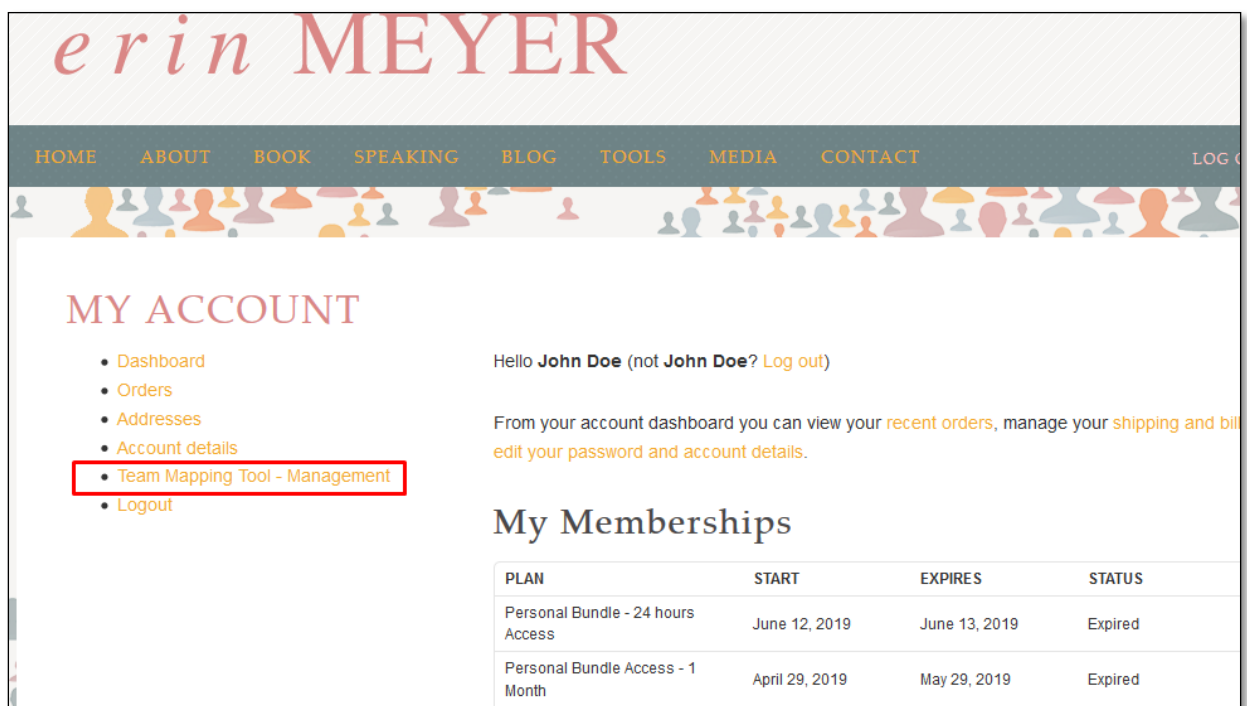- Section **Team Members access** explains Team Members how to access the tool.

Tip: If you are not a team Leader/Administrator but just want to know how to use the tool after receiving your Team Code and your Team Member Code, please go to section **Team Members access** of this document directly.

Team Leaders/Administrators access:

You should be able to log in to the 'My Account' page (www.erinmeyer.com/my-account/) using the access credentials sent to you in the confirmation email you received after you purchased the product(s).

[**Note**: If you have not received a confirmation email, please write to us, and we shall help you to sort that access]

➢ Access to the My Account area

To Access the "Team Mapping Tool's" management area, click on the "*Team Mapping Tool - Management*" link in the left-hand menu as shown below (highlighted in red).

➢ Team Mapping Management Tools Page

Once you have clicked on the menu link, you will be given the following options:
- Add new members to a team
- View list of current team(s) and members details
- Purchase new team licenses

A **Team** is any group of 2 or more people that you have selected and whose Culture Map profile you want to compare to one another. For the system to know which individuals you want to compare with each other, you need to group them as a Team and need to give the Team a name.

A **member of a Team** is any individual that you want to include in a Team in order to allow them to compare their profile to that of other members from their Team. You can have anything between 2 and 100 members in a Team.

The tool needs you to setup the teams, members, and then provide the members with the access code to use the tool. The details of the steps to take in sequence are provided in the page as well for your reference, along with the link to this guide.

➢ Add new members to Team

If you are creating a team for the first time (usually right after having purchased the tool and once you have gotten your log-in information), this is where you create the list of team members that you want to map out against each other. If you have already created a team, this is also where you can add team members to existing Teams.

To create a Team Member list, you need to do the following:

First select the team to which you want to add the member to. It is important to choose the right team, as the licenses are not transferable between teams. Also, if a team current usage is equal to the purchased limit, you will not be allowed to add a participant to that team. So, make sure you choose a team with available licenses.

For example, if the purchase limit is 7, and used licenses are (say) 2, because you have previously created two members, then the tool will only allow you to create up to 5 more licenses. You cannot create more than the allowed limit.

To help understand the licenses used, the Team details in the Drop-Down selections reads as –
Team name (Number of Used Licenses / Total Purchased Licenses).

Ex: Marketing (3/10) reads as Team name: Marketing, and 3 Licenses used out of 10 purchased total. This information is available as a tool tip when you click on the Drop-Down control.
Then add the team members:
Just type in the first name, last name and any notes you might need making sure you complete with one line per member:
- *First Name*: denotes the participant's first name

- *Last Name*: denotes the participant's last name
- *Notes*: can be used to add any notes such as the participant's department or other information. This will not be used anywhere in the tool, but merely is provided for your reference. It can be useful if you are managing multiple teams so that you can identify each team by department, team member's functions or others.

Click on "+ Add more rows" if you need to add more Team Members and on "Next >" to add the members. Once the "Next >" is clicked, the tool validates the team member data provided in the form and process them to be added into the system.

On the results page, you will see the group name to which the members have been added to, and the report detailing the members added, skipped (– if any due to errors), and detailed next steps to be taken after the members are added to the team.

The above is example where you have added 3 new participants, and all 3 have been successfully imported from the file, and access has been created. The link "click here to download", helps you to download the access codes of current and newly added members.

If you click on the "Click here to download' link at the bottom of the page, the resulting file will give for each Team Member the Group Name, the Team Member first and last name, the notes, the Team Code and the unique team Member Code as well as an individualized Team Member link (Unique Direct Access Link) that you can send them so that they can directly access the tool.

Group Name	First Name	Last Name	Notes	Team Code	Member Code	Participant Ref Code	Unique Direct Access Link for this member
Ericfebruary5	Roger	Federer	tennis	2QSH	2453	2QSH-2453	https://www.erinmeyer.com/team-culture-mapping-tool-access?refCode=2QSH-2453
Ericfebruary5	Michael	Jordan	basketball	2QSH	4517	2QSH-4517	https://www.erinmeyer.com/team-culture-mapping-tool-access?refCode=2QSH-4517
Ericfebruary5	Lionel	Messi	football	2QSH	9257	2QSH-9257	https://www.erinmeyer.com/team-culture-mapping-tool-access?refCode=2QSH-9257
Ericfebruary5	Tiger	Woods	golf	2QSH	9789	2QSH-9789	https://www.erinmeyer.com/team-culture-mapping-tool-access?refCode=2QSH-9789

Depending on your computer, this list might need to be converted to be read by Excel (instructions on

how to import a .CSV file into Excel can be found here: https://www.hesa.ac.uk/support/user-guides/import-csv)

➢ View list of Current Team(s) and members details

In this Option, you can view the list of all the existing teams you have created as well as their usage. You can also download the team member's access details separately for each team.

THE TEAM MAPPING TOOL

Current Team List -

# TEAM NAME	TEAM CODE	MEMBERS CREATED	MEMBERS LIST	CREATED DATE	REPORT VIEW
1 Marketing	BVW3	0 / 7	Download access	July 1, 2019 12:52 PM	Report | Share

Please follow these important Instructions on using the Team Culture Mapping Tool:

If there are no team members added yet, then -
1. Add team members to the newly created team by clicking on the "Add members" link for a given team.

If team members are already added, then -
1. Add more team members to your team with available licences by clicking here.
2. Please click on the "Download members" link above to download the member access codes for a given team.
3. You can then send team members their access codes by forwarding to them the downloaded file along with the following link: https://www.erinmeyer.com/team-culture-mapping-tool-access
4. You can return to the My account page page to manage your Team Culture Map Tool.
5. You can use the *Report* link in Report View column to do a team member comparison chart.The **Share** link can be given to non-admins for Report view without the need to login

Tool usage Instructions guide:
1. Download and refer to the complete step-by-step instructions guide here.

Team name is the name you have given your team(s) when you first created it/them

Team Code is the common code to be used by all team members while they are accessing the questionnaire. This tells the tool which users belong to what team and upon questionnaire completion, it will map out each team members that have used the same team code. The Team code needs to be given to Team members when they register.

Members Created shows how many team members are currently part of a specific Team. It can be anything from 2 to 7. The number of members per group has been artificially limited at a maximum of 7 for ease of reading of the results map. If the number of team members is less than the number of licenses purchased, then you can add new members to the team in the future at any time until the lesser of 7 or the number of licenses purchased is reached.

Members List column shows you a Download link that is specific to the Team. Clicking on Download gives you a .CSV file that can be opened in Microsoft Excel or a plain note pad as well. It contains the access code details for each team member. You as an Administrator of the team, need to provide the Team code details to each team member as indicated in this file.

Created Date is the date the Team was first created

Report View column provides a direct link for the Administrator to directly access the Team members data on the report chart page to see how many team members have completed the Questionnaire and also to run a comparison mapping. The Administrator can see the results without having to be a member himself.

The **Share link** can be passed to any non-admins, and enables them to access the reports page without the need for a login. Please be careful to whom you share this with, and the need to do so. The report page for shared link shows (SHARED VIEW) in the team name to visually differentiate the

admin view and the shared link view. The data and other parts of the page are identical.

Also, an important point to note is - Every time a new team member is added, that member gets a new code with no impact on existing team members.

Instructions to access a completed report from the Login screen:
1. Log into the tool and go to the "Team Mapping Tool - Management" screen.
2. Click on the second option: List of current team members and members details.
3. Click on Report under REPORT VIEW in the right hand column for the report that is of interest to you.
4. A blank map of the 8 dimensions appears. If you scroll down you will see the list off all the members who have responded to the Questionnaire. You can select as many of them as you want (hold the Ctrl key + scroll down keys to select multiple names at once) and hit COMPARE
5. You will then see the mapping for all the members of your team.

Team Members access:

➢ I am a Team Member

A Team Member is any individual that is part of a Team as defined by the Team Leader. You are the one, taking the questionnaire and comparing the results with that of your team members. There are two ways to access the tool as a Team Member. Your Team Leader/Administrator can send you a link that will permit you to access the tool directly. The link will look something like this:

https://www.erinmeyer.com/team-culture-mapping-tool-access?refCode=2QSH-2453

This link is a direct access setup, where you will be presented with the questionnaire directly, and does not require you to provide any codes.

Alternatively,

your Team Leader/Administrator might have given you just your Team Code and Member Code. The Team Code is alphanumeric code made up of at least one number and 3 letters and it is shared by all members of the same team. The Member Code is your unique 4 digit number code. You will need both to access the tool after clicking on the following link:

https://www.erinmeyer.com/team-culture-mapping-tool-access

THE TEAM MAPPING TOOL

You can enter your team code and member user code OR the participant reference code below. Those codes have been provided to you by your team administrator (the administrator is most likely the person who purchased the tool for your organization). Then press the relevant SUBMIT button.

Access Codes

If you are given a Team code and Member code separately, please provide them here -

Team Code: *

Member Code: *

SUBMIT

Reference Code

If you are given a single Participant Reference code, please provide that here -

Participant Reference Code: *

SUBMIT

IMPORTANT: If you need instructions on how to fill out this form and how to use this tool in general please download our guide by clicking here.

When you arrive on this page, you will have to either fill in the ***Access Codes*** section with the Team Code, and Member Code or the ***Reference Code*** part. If the provided code is valid, then the Questionnaire page will load for you to answer the various details that helps to prepare the culture map based on the results.

Note: A Reference Code value will always have a '-' in the middle, and should be typed as-is to be valid. Ex: 2QSH-2453, should be typed as-is, including the hyphen into the form.

➢ Invalid Access

In the case of an Invalid or Incorrect access codes being entered, an error message will be displayed. Please pass it on to your Team Leader to help sort out your access issues.

THE TEAM MAPPING TOOL

Could not load the page. Please state the following error to your administrator.

Error: Invalid or Expired Access Code provided. Reference Code: 2QSH-2453

Alternatively, you can enter your team code, and member user code Or the Participant Reference code below. Then press the relevant SUBMIT button.

Access Codes

If you are given a Team code and Member code separately, please provide them here -
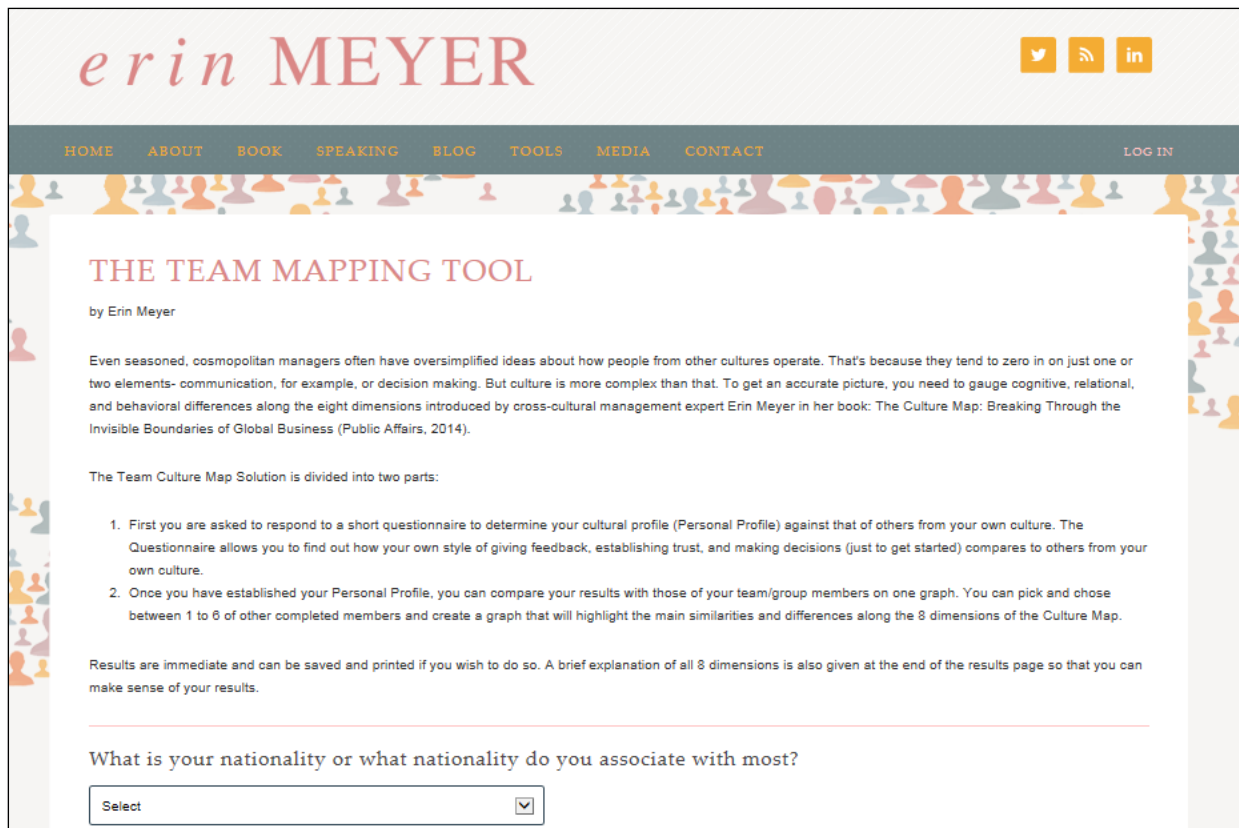
Team Code: *

Member Code: *

SUBMIT

➢ Valid Access Codes

When a valid access code is provided, the tool loads up with the Questionnaire section.

The Tool has about 24 different set of statements and needs you to provide your agreement levels to them varying from Strongly Agree - to - Strongly Disagree.

Once you have completed the Questionnaire, the tool calculates the results and generates a report, as well as gives you the options to compare your results with that of other members of your team.

➢ Report/Results Page

The results page details the outcome of your responses along the 8 dimensions that comprise the Culture Map. It also give you a list of your team members whose data you can compare yourself with, as well as an explanation of each of the scales.
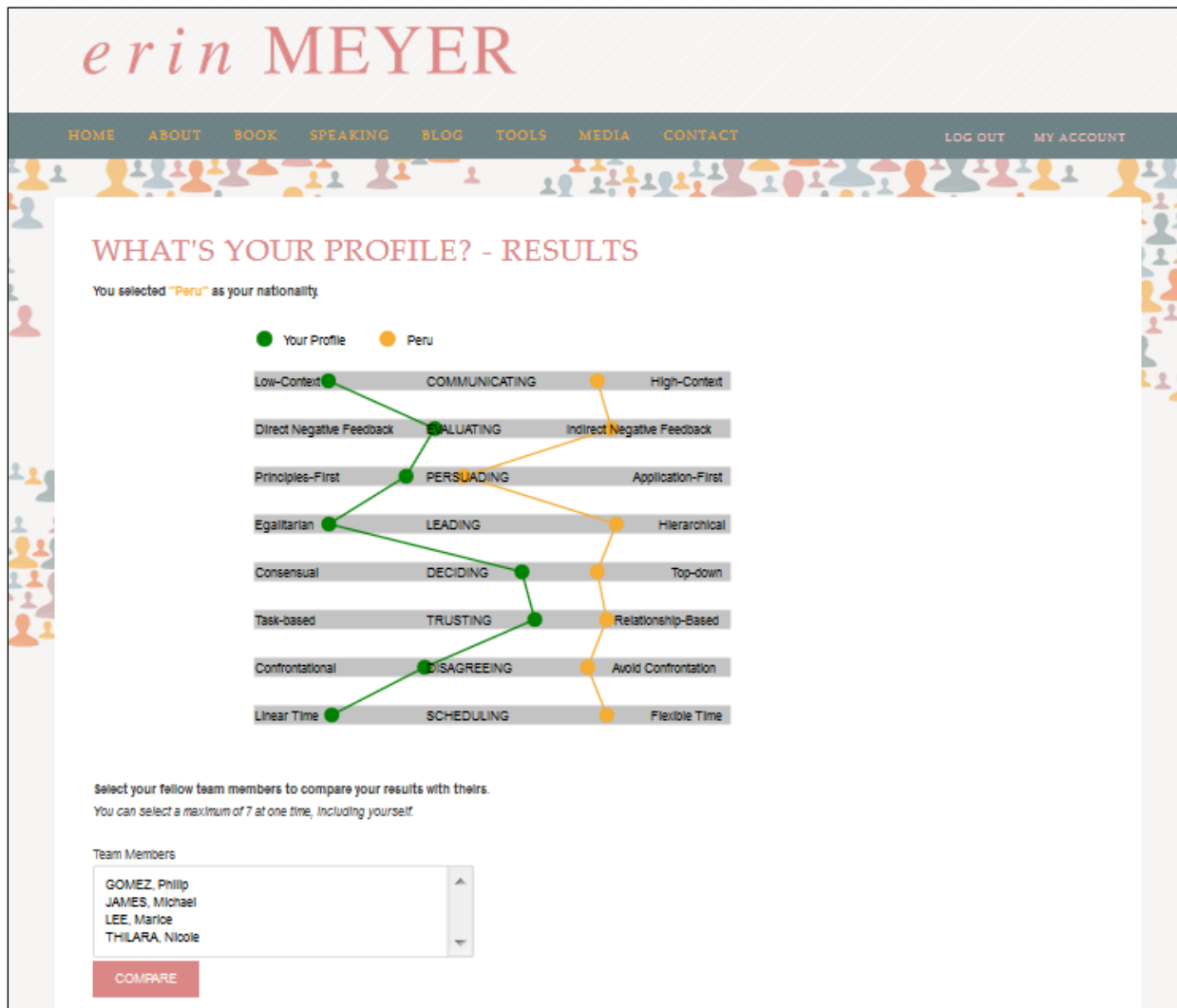
➢ Comparing your results with other team members

The tool's results page allows you to compare your results with those of your team members, limited to 7 team members at a time (otherwise the map will be difficult to read). The tool only shows the members that have completed the questionnaire, so it could be a case where if you have completed the questionnaire before everyone, the "Team Members" section will be empty. You may have to access the tool again later thereby allowing others to complete the questionnaire first.

To select other members of your team, click/tap on the Team Member name(s) and then click on the COMPARE button.

Tip: To select more than 1 team member, hold the Ctrl key on the keyboard, and then tap/click on the names. If you are on a touch device, you may have to long press on the first name, and just do a one-time tap to select subsequent names.
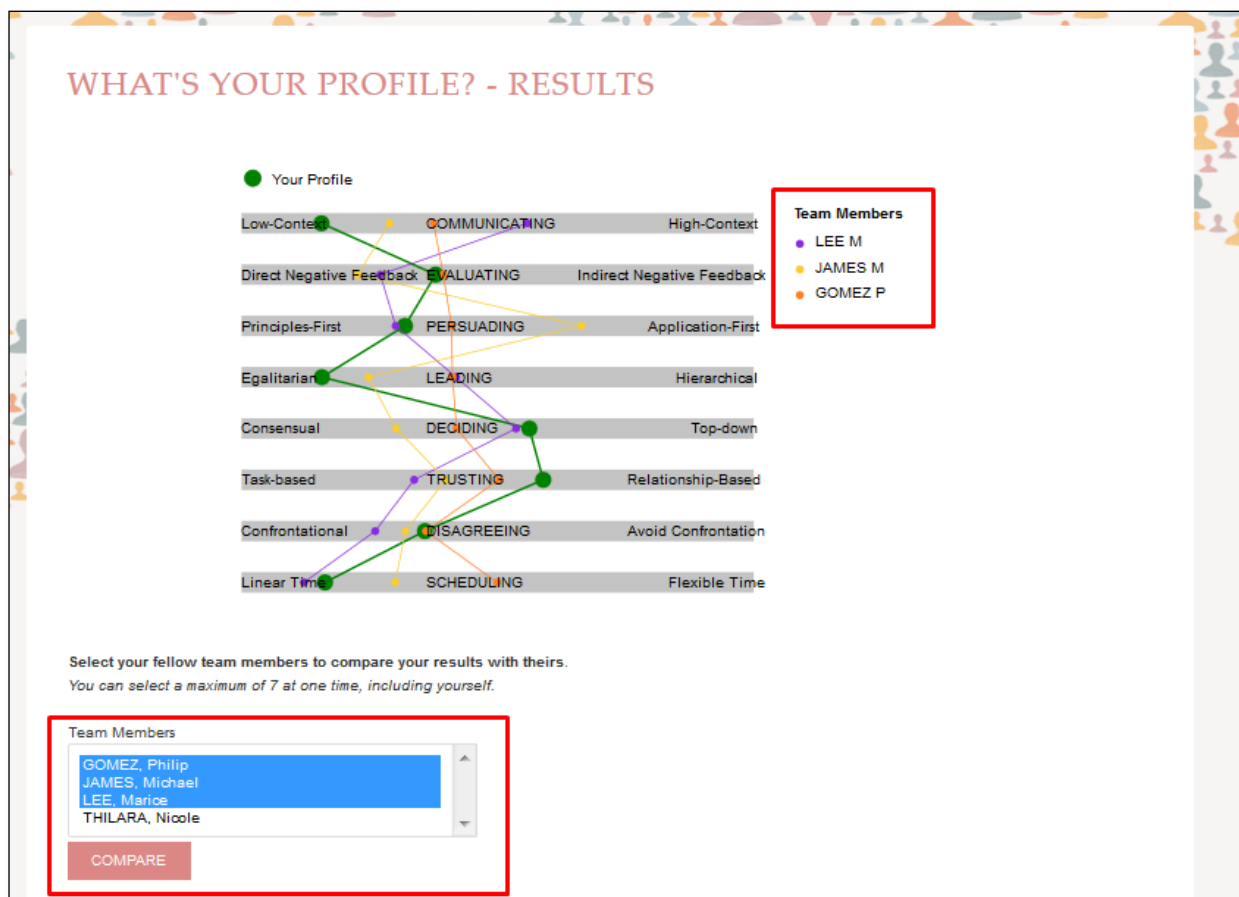
The selected team members are shown, and their results are shown on the graph. You may repeat this process, by de-selecting certain current members, replacing them with others up to the previously stated limit of 7 at a time. You should either print the results or save them on your computer for offline viewing.

➢ Repeat Access

The Team Mapping access codes allows you to visit the tool any number of times. It does not give you the option to answer the questionnaire again, but gives you the option to compare your results with any of the other team members (up to 7 at a time).