ITP METRICS
Growing your people and ours

Creating and Managing Assessments on ITPMetrics.com

Updated August 2025

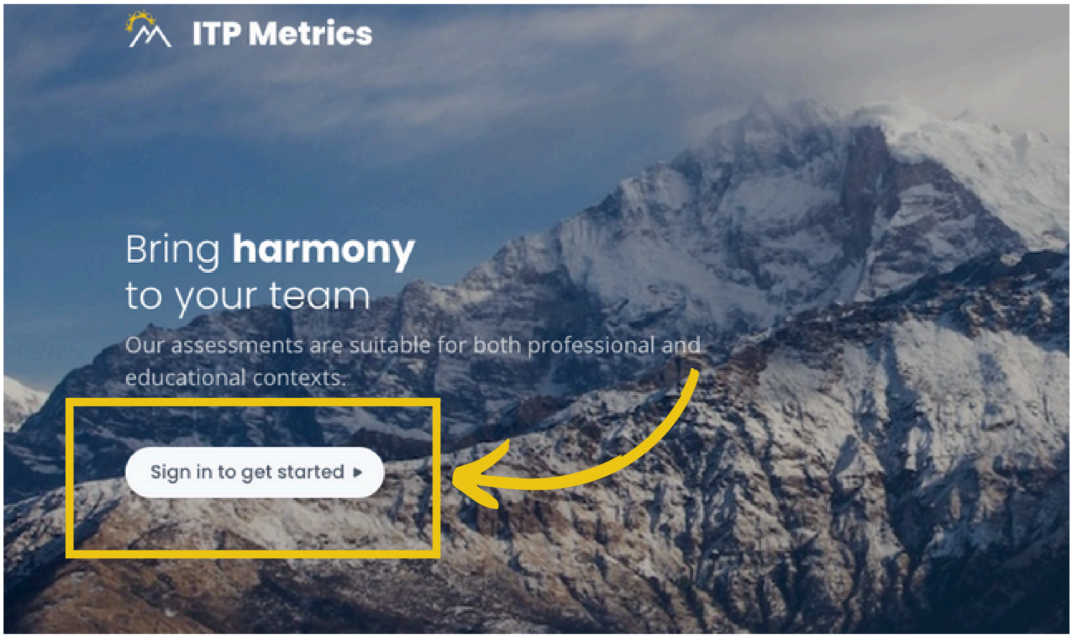
Where to Find What you Need to Know

Click the title of the section you would like to review.

Sign in to ITP Metrics

Select 'Sign in to get started' and enter your email address.

Hint: If you've used ITP Metrics before, use the same email address here. If you are from a post-secondary institution or non-profit, be sure to use your university or organization email.



After entering your email address, you will receive an email to your inbox from support@itpmetrics.com. The email will include a link to access your account

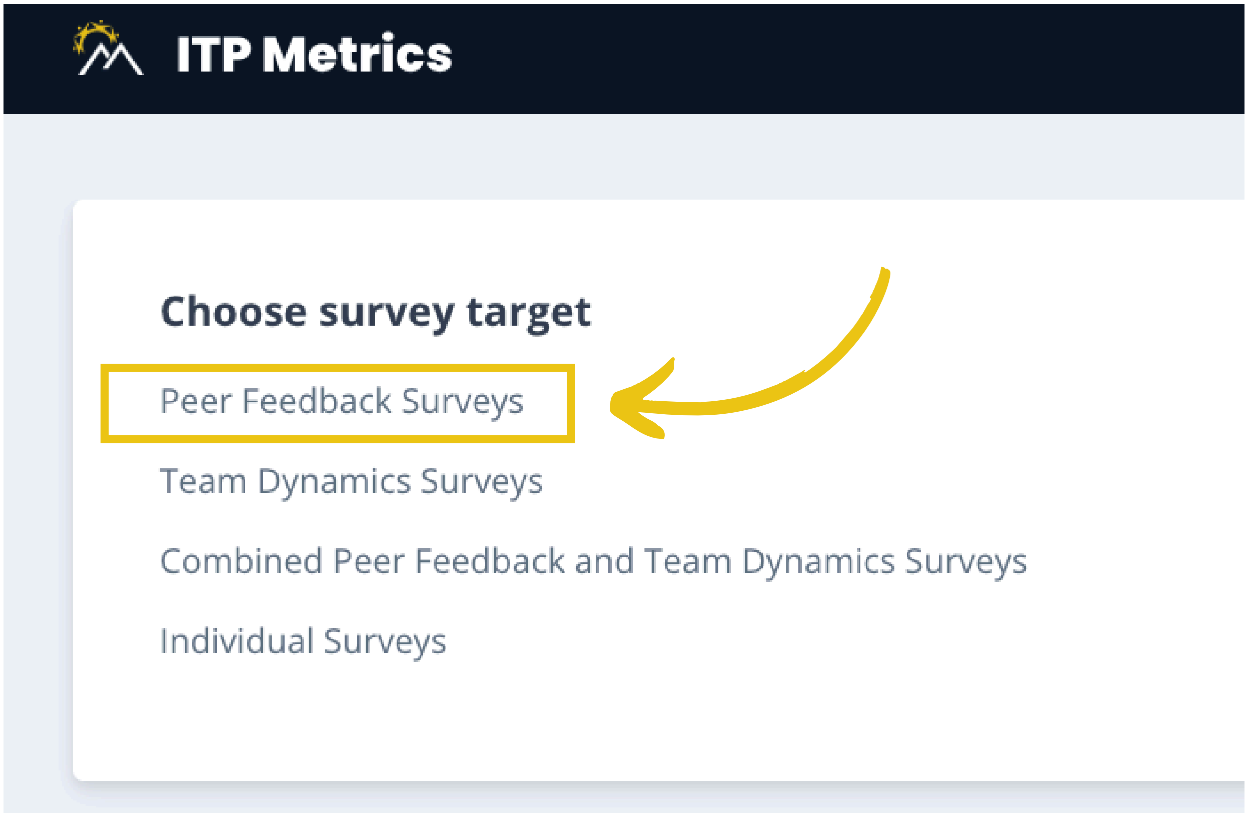
Note: You will need to do this each time you login. No need to remember a password!

Select an Assessment

Once you are signed in, in the top right corner of your screen, select the Create Assessment tab.

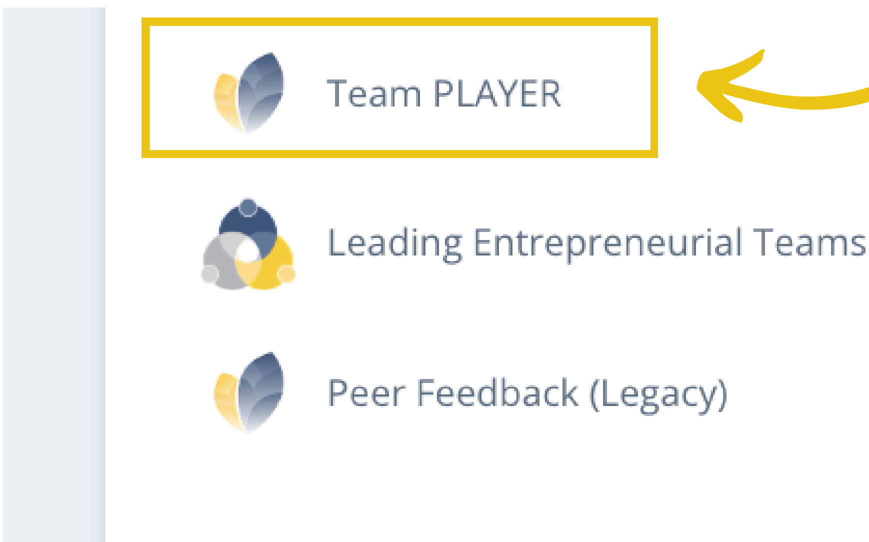
Then select a survey target. For this example, we will choose the Peer Feedback option which is a team-based assessment.

Hint: Individual surveys include Personality and Conflict Management Styles which can be taken without being a part of a team! For more details, jump to our section on Individual Assessments.



Then choose which assessment you would like to create.

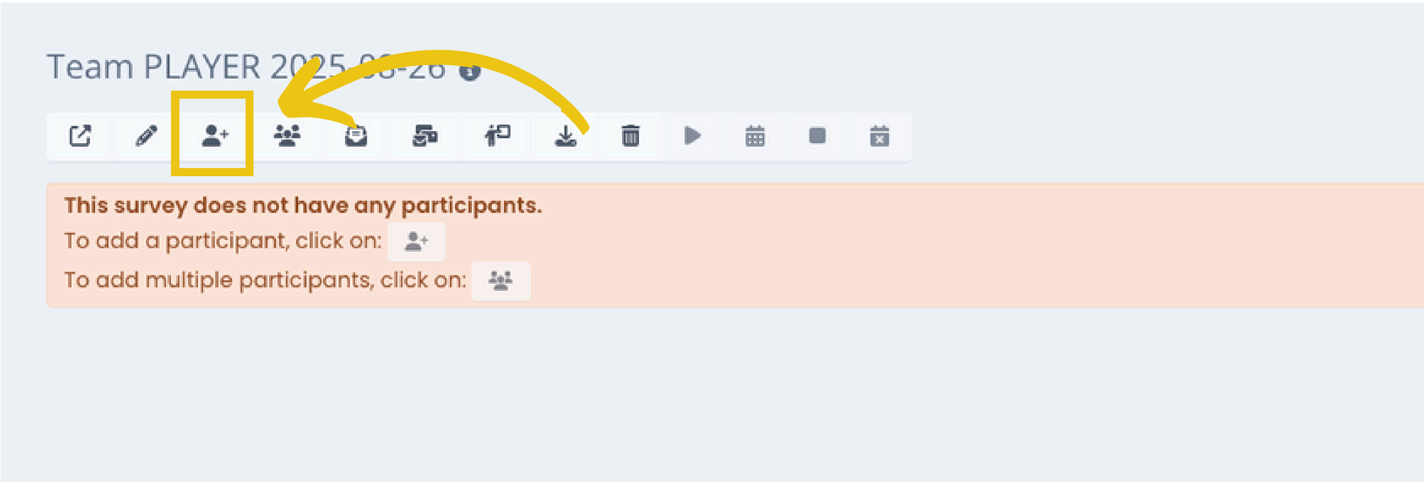
Here we will walk through creating the Team PLAYER assessment, which is our updated Peer Feedback tool but the assessment creation steps are the same for all team-based assessments.

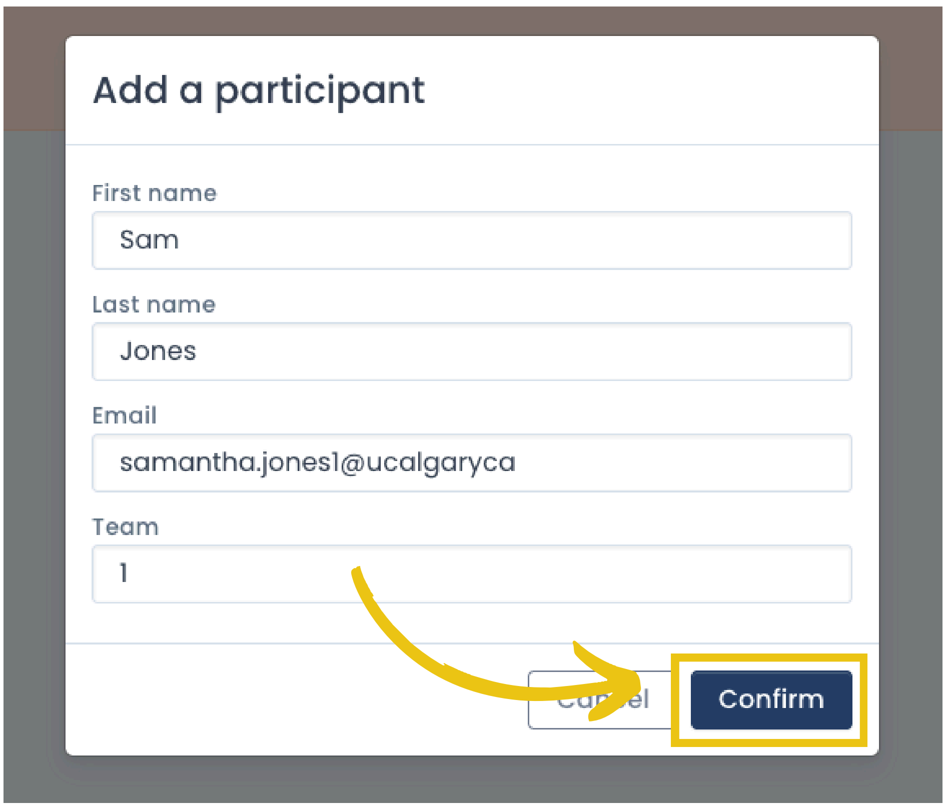


Add Participants

Once you have created the assessment, you will need to add participants. There are two ways to do this.

Option 1: Manually Enter Participants



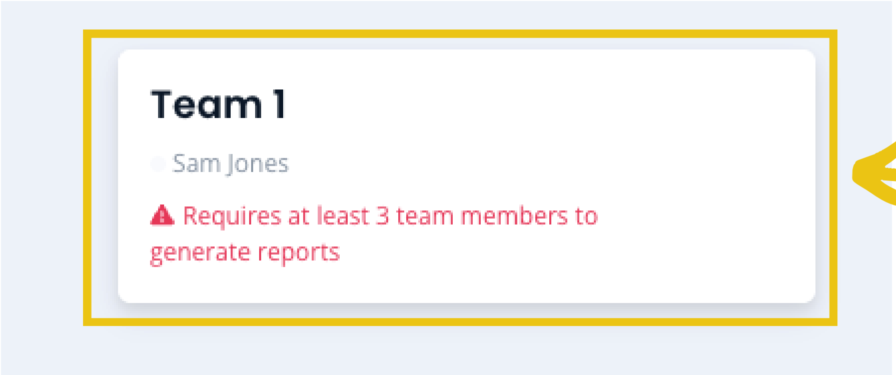


Here, you will manually enter the information for each participant and select Confirm.

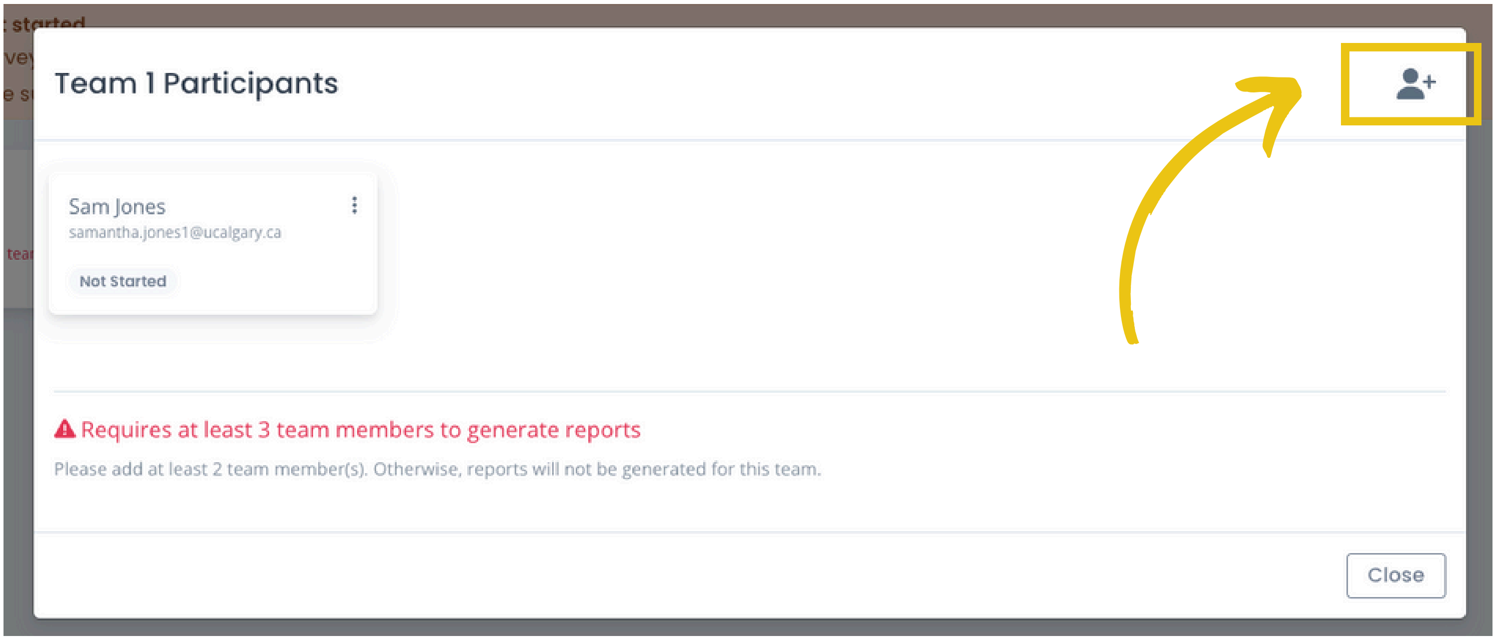
Hint: Make sure you use participant's preferred names as the name entered here is the name their team members will see when providing feedback.

You can then continue to build the participant list by repeating this step, or by adding participants to a specific team.

You can add members to a specific team by selecting the team..



And selecting the ‘add team member’ button.

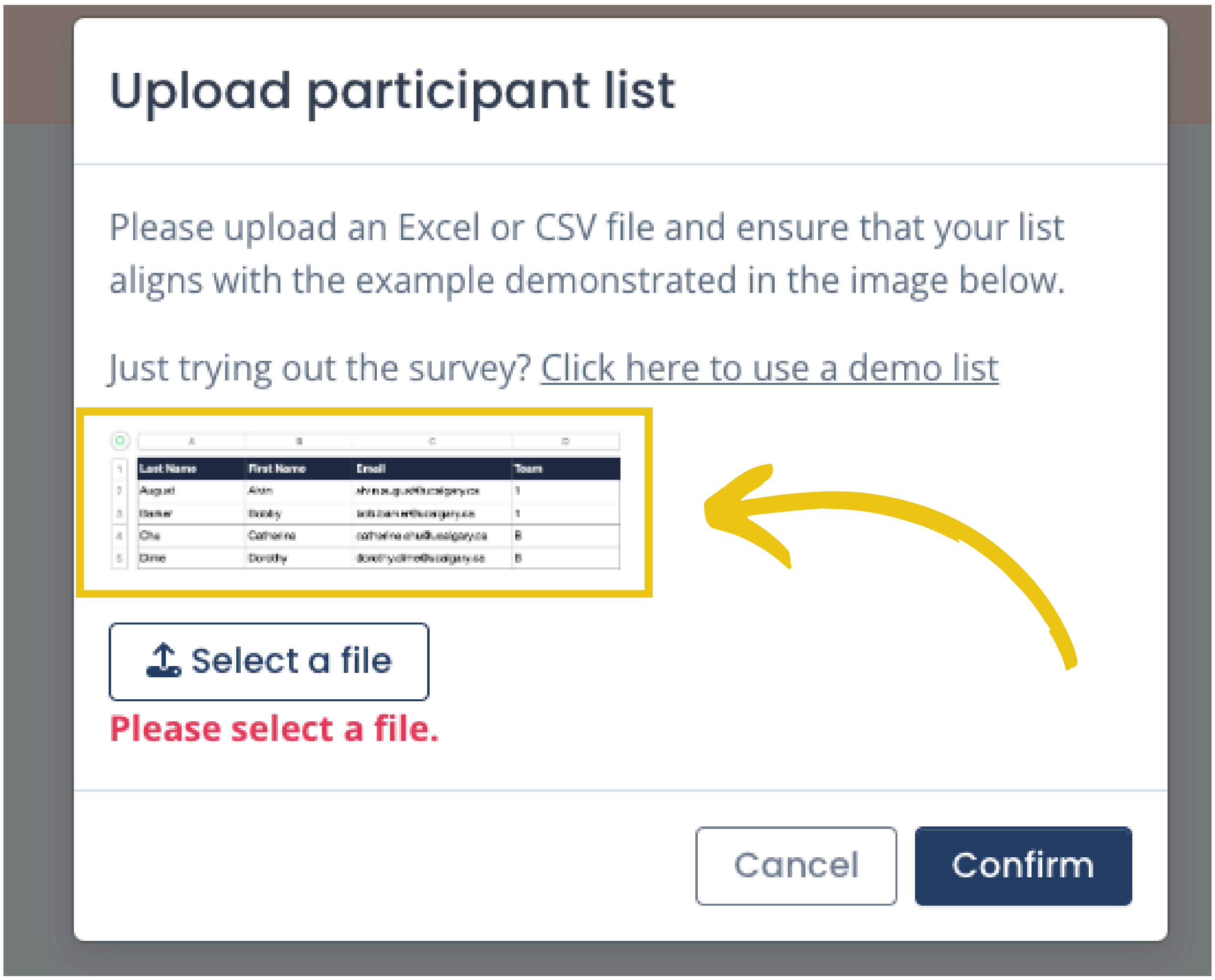


Note: Each team will require at least three members.

Option 2: Upload a Participant list

You can upload a participant list that will generate all of the team groupings on your dashboard. Make sure the file includes the headings provided in the example image in the provided order: Last Name, First Name, Email, Team.

Hint: Make sure you use participant's preferred names as the name entered here is the name their team members will see when providing feedback.



Customize the Assessment Details

Once your participants are loaded into the assessment, you will need to determine the name of the assessment and what information will go into the invitation email to participants.

Edit the survey name. This is the name for the assessment that will appear in your personal dashboard, the participants' dashboards and the subject line of the email participants receive.

Edit the content of the email participants will receive when the assessment opens. This information will be shared as the first line of the email, followed by the assessment link.

You can also add other assessment managers who have access to the dashboard and all participant responses.

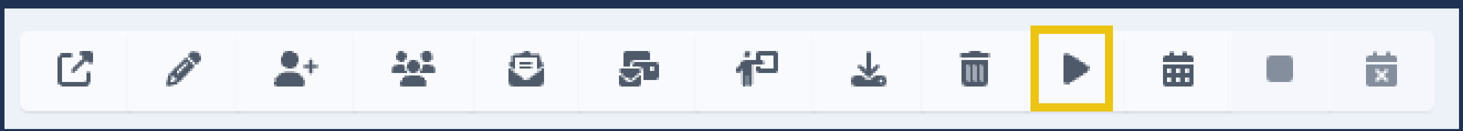
Hint: This is where you can add other instructors, teaching assistants, or staff who will help manage the assessment. Enter their email address to approve their access

Add an assessment manager. This is another person with access to the dashboard, can manage participants, and see scores and feedback.

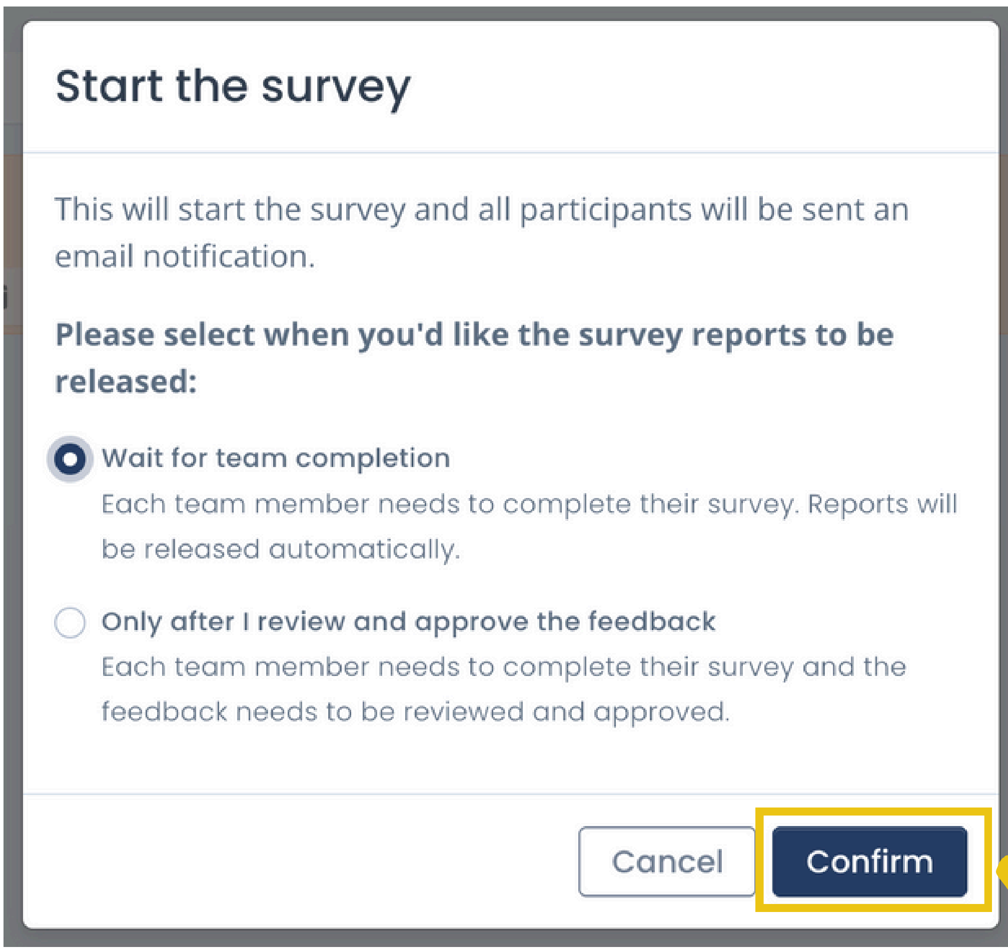
Starting the Assessment

When launching the assessment, you have two options:

Option 1: Start the Assessment Immediately



Start the survey. Assessment will open immediately after following the prompts.

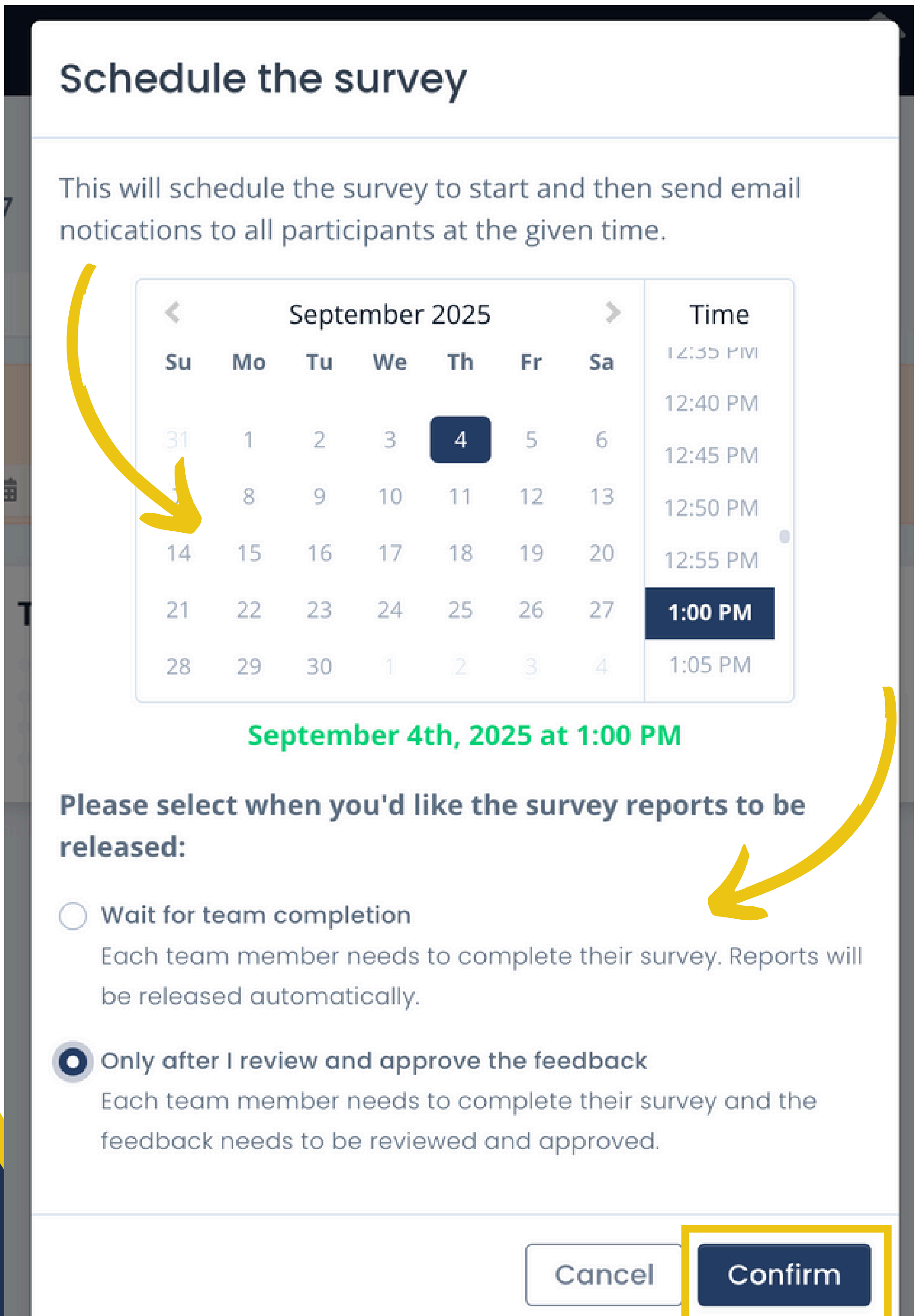


When launching the assessment, you will need to select how you want the reports released.

Hint: Select the second option if you would like to view the feedback participants provided about their team members before it becomes accessible to the participants. For more details, jump to our section on how to review feedback.

Option 2: Schedule the Start of the Assessment

Schedule the start of the survey. Assessment will open automatically on the date and time selected.



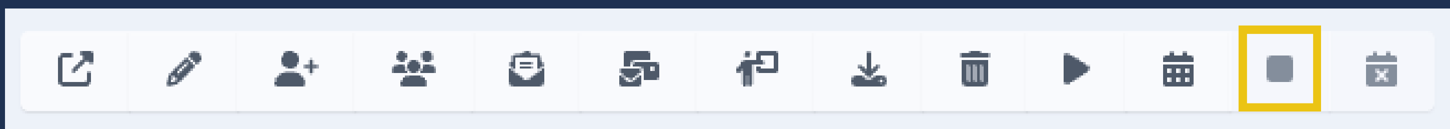
If you would like the assessment to start at a specific date and time, you can schedule the start of the assessment. Select the date and time and then select how the reports will be released.

Hint: Select the second option if you would like to view the feedback participants provided about their team members before it becomes accessible to the participants. For more details, jump to our section on how to review feedback.

Ending the Assessment

When you want to end the assessment, you have two options:

Option 1: End the Assessment Manually

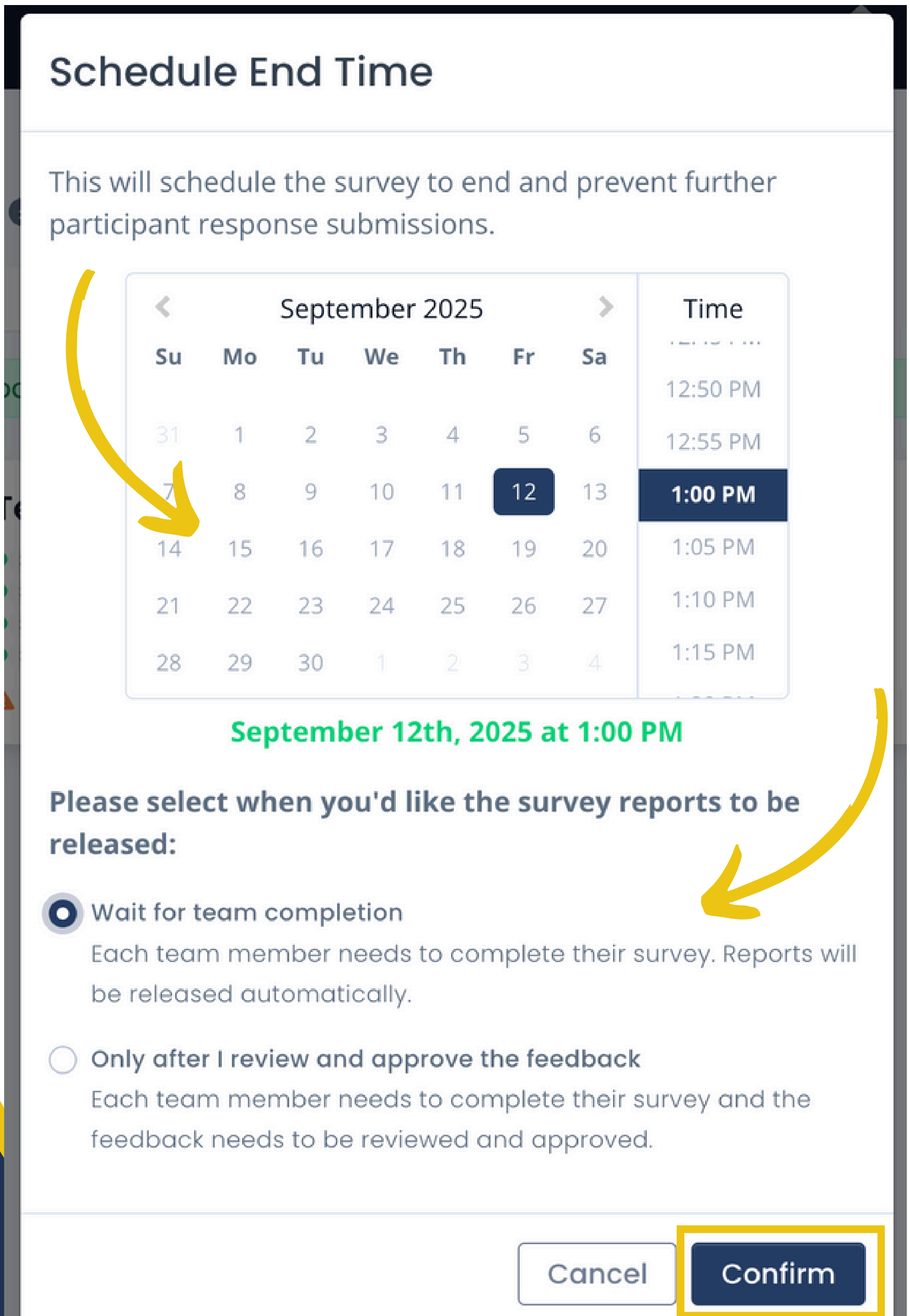


End the survey. Note, this button will only become available once the assessment has begun.

Note: Once the survey has ended, participants will no longer be able to respond. If there are teams where not all members have completed the assessment, ending the survey will release their reports. Note, at least three team members must have completed the assessment for this to happen.

Option 2: Schedule the End of the Assessment

Schedule the end of the survey. After the selected date and time, participants will no longer be able to complete the assessment. Note, this button will only become available once the assessment has begun.



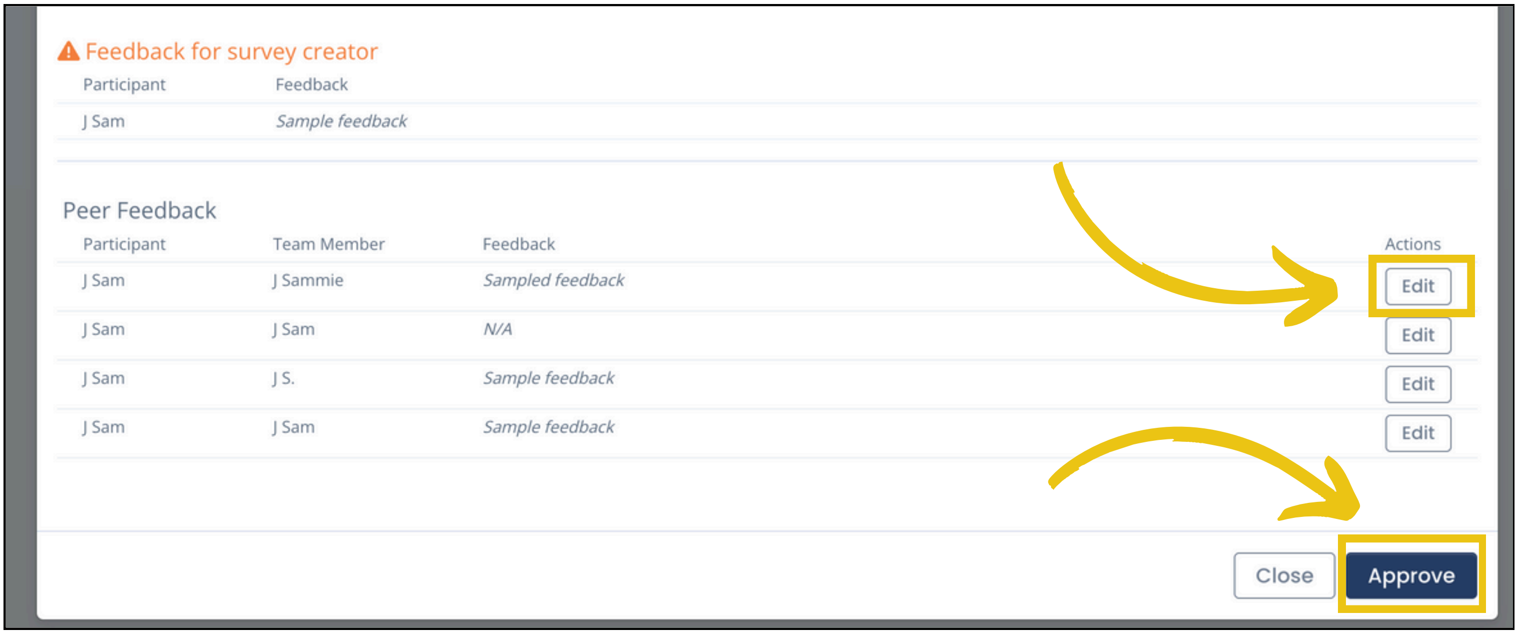
If you would like the assessment to end at a specific date and time, you can schedule the end of the assessment. Select the date and time, and then confirm how the reports will be released.

Note: Once the survey has ended, participants will no longer be able to respond. If there are teams where not all members have completed the assessment, ending the survey will release their reports. Note, at least three team members must have completed the assessment for this to happen.

Approving Feedback

If you choose to review and approve all feedback, you will need to review each team before the reports will be released to participants.

To review feedback, select the team and scroll down to review comments to specific team members. If you determine that any feedback needs to be modified, select edit and make the required changes.



Once you select 'Approve', reports will be released to participants. Participants will receive an email notification to let them know their reports are ready.

Reviewing the Results

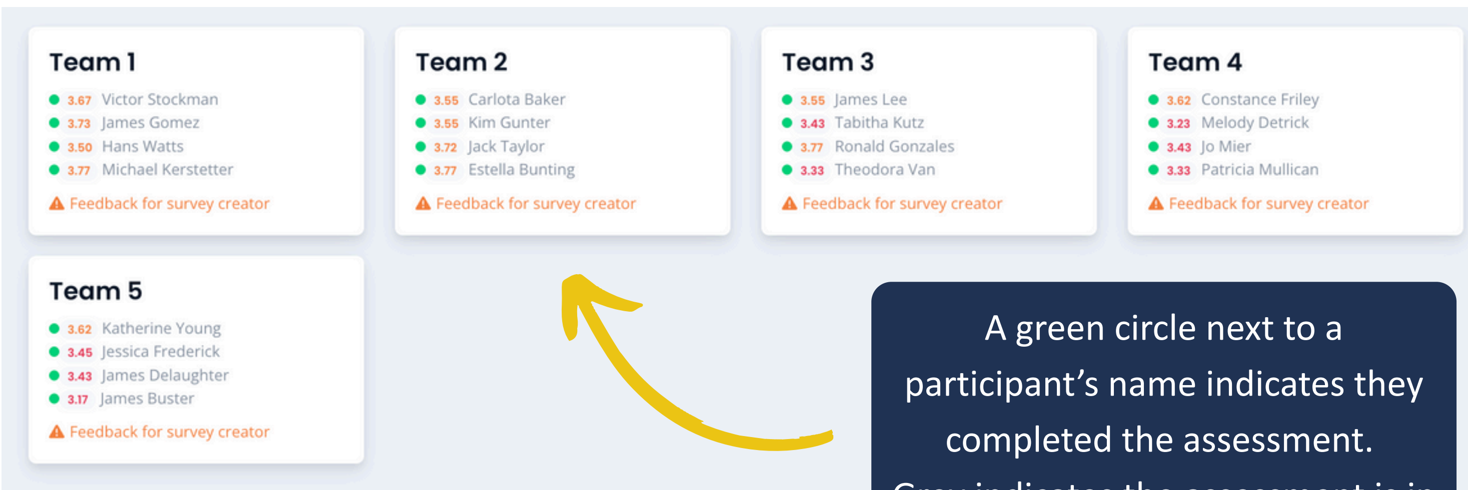
When the assessment is complete, several features are available to help you review the results.

On your dashboard, you will see an overview of each team and the participants' scores. The scores will be colour-coded to indicate the relative ranking of that individual's score compared to other ITP Metrics users. This is a quick way to see if certain participants or teams may need additional support.

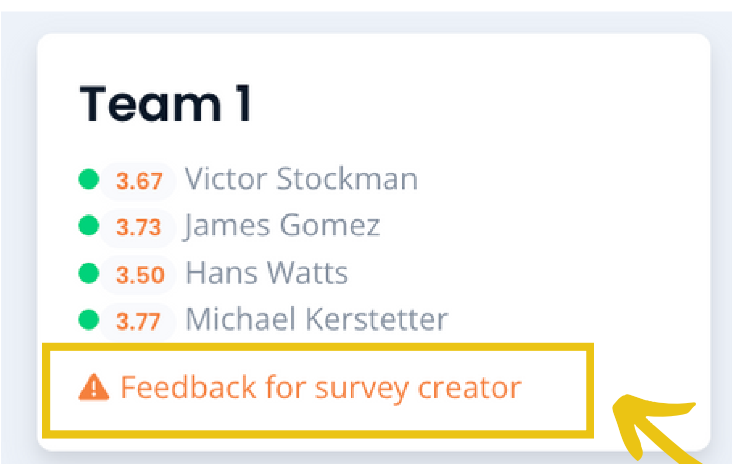
Red = Low

Orange = Moderate

Green = High

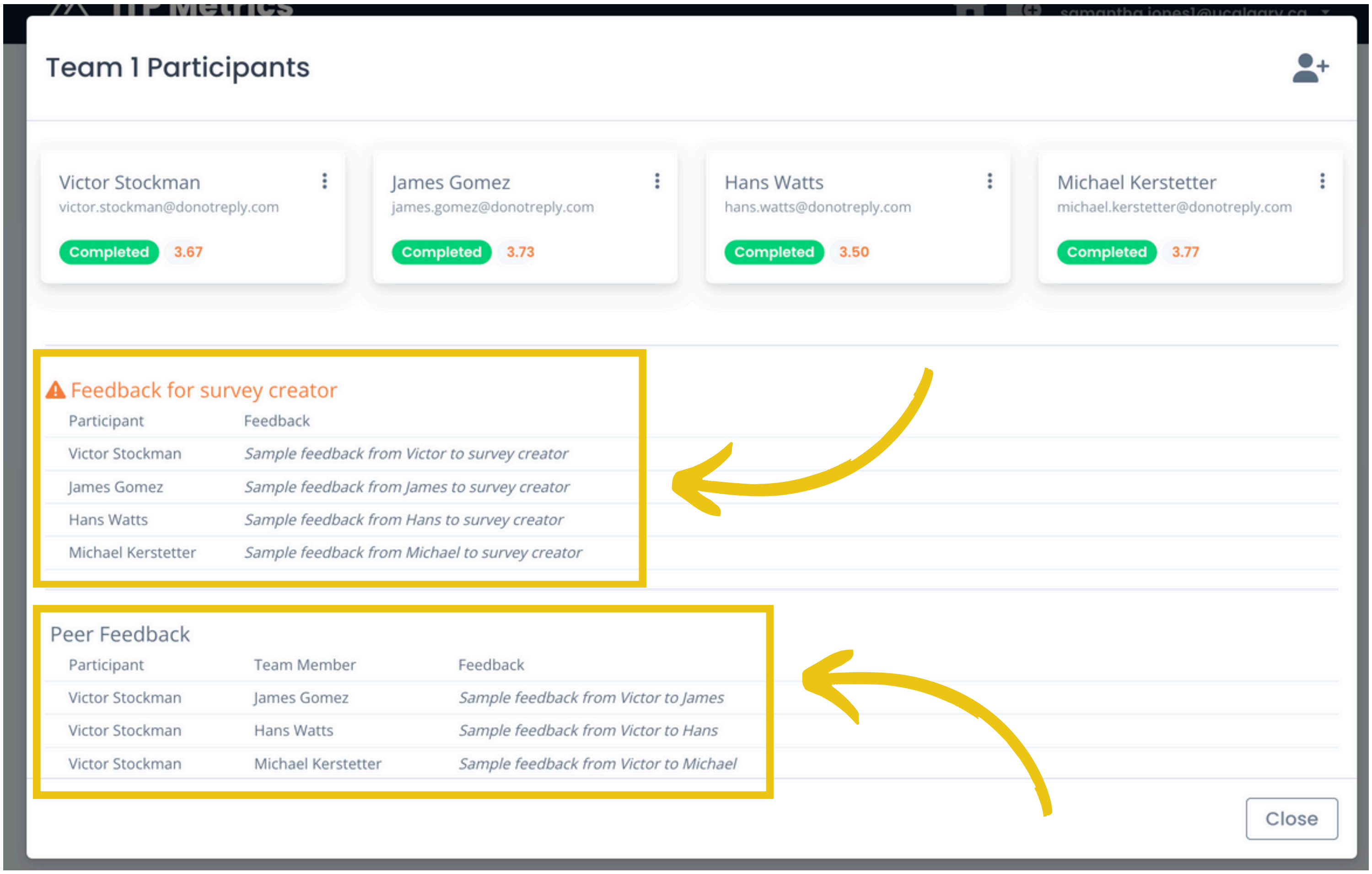


A green circle next to a participant's name indicates they completed the assessment. Grey indicates the assessment is in progress and no circle indicates the assessment was not started.

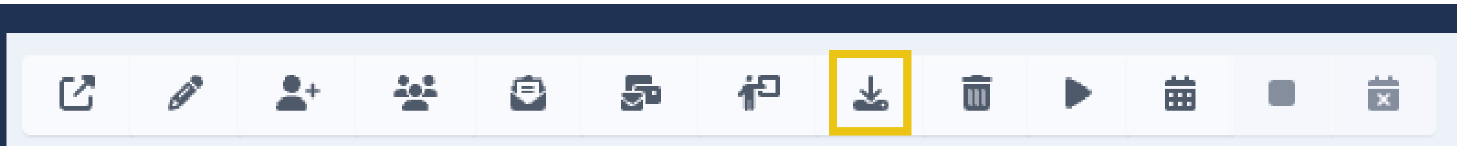


In the assessment, participants can also leave confidential comments for the survey creator. If a participant has left you feedback, you will see this notification under the team.

If you click on a specific team, you will be able to see more details about their results and review any feedback provided.



Note: If a participant did not provide feedback, the feedback column will say N/A



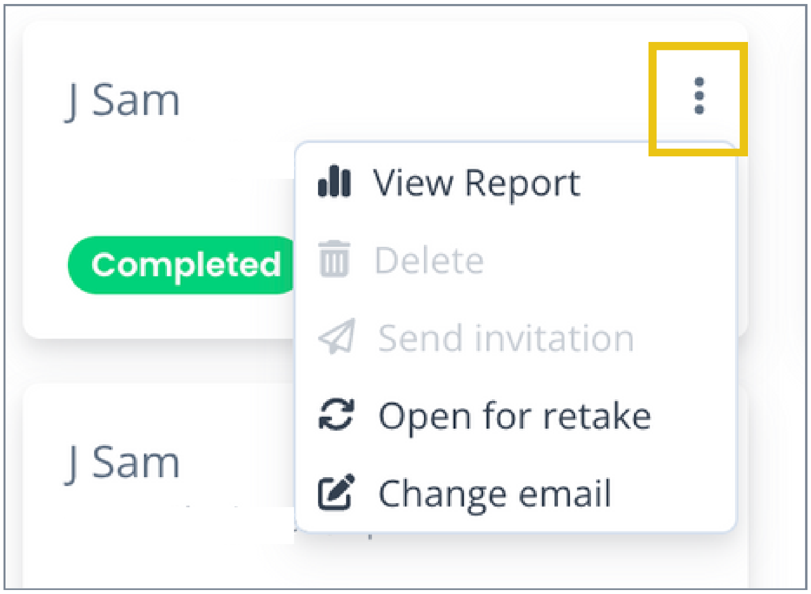
Download the data from participants' responses.

If you prefer to review the results in spreadsheet format, you can download participant responses by selecting the download button.

Trouble Shooting

You can make changes or view reports for individual participants by selecting the team, and then selecting the three dots in the upper righthand corner for the participant.

Participants that have completed the Assessment

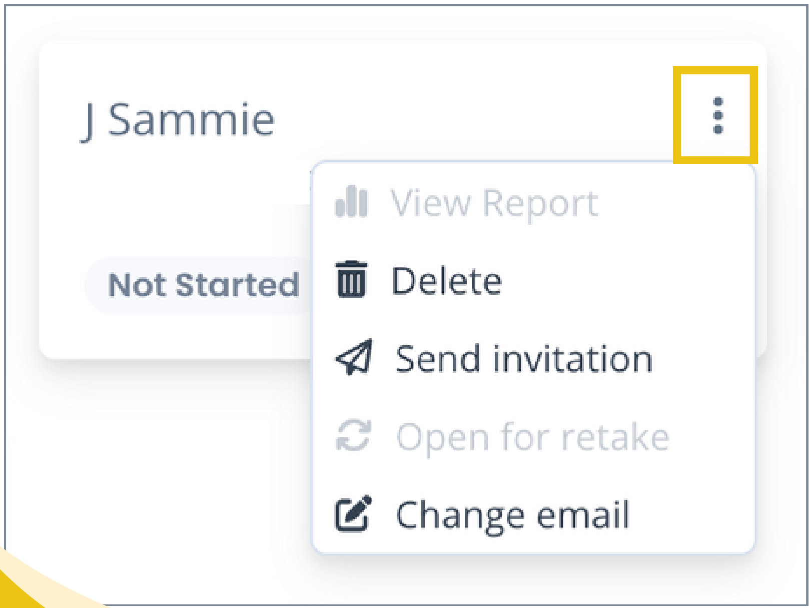


View Report: View the participant's report in a new window

Open for retake: Allows the participant to make changes to their responses

Change email: Will resend the assessment to a different email

Participants that have not completed the Assessment



Delete: Remove the participant from the team

Send invitation: Send a reminder email to only that participant

Change email: Will resend the assessment to a different email

Individual Assessments

Individual assessments can be taken by groups or you can try it out for yourself! Once you are signed in, in the top right corner of your screen, select the Create Assessment tab and select 'Individual Surveys'.

Choose survey target

Peer Feedback Surveys

Team Dynamics Surveys

Combined Peer Feedback and Team Dynamics Surveys

Individual Surveys

Create Survey

Follow the same steps as setting up a team survey explained here

Note: If uploading a participant list, you don't need to include a team number

Choose survey template

Personality

Conflict Management

Personality

INDIVIDUAL SURVEY

This report outlines your level on five factors of personality based on your responses to the questionnaire you completed. It also describes how these personality traits can relate to your team interactions and experiences in teamwork.

Preview

Sample Report

Create Survey

Take Survey

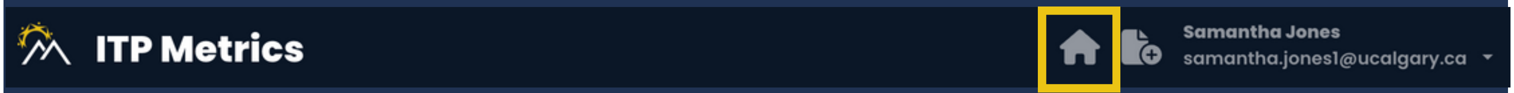
The assessment will begin and you can learn more about your personality or conflict management style!

OR

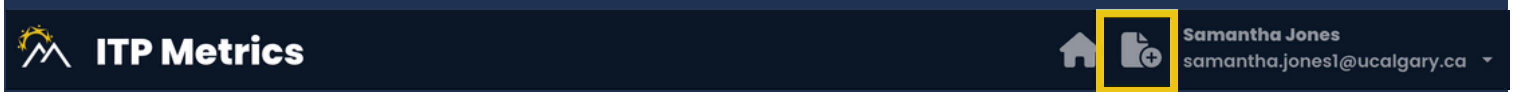
Did you want to take the survey just for yourself?

Take Survey

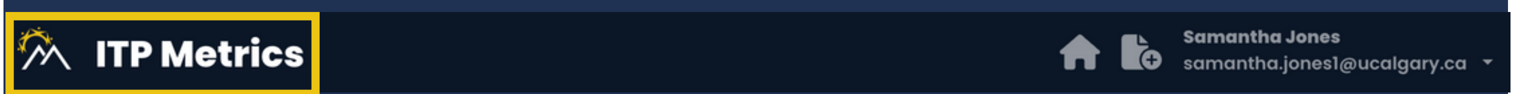
Quick Guide: Navigating your Dashboard



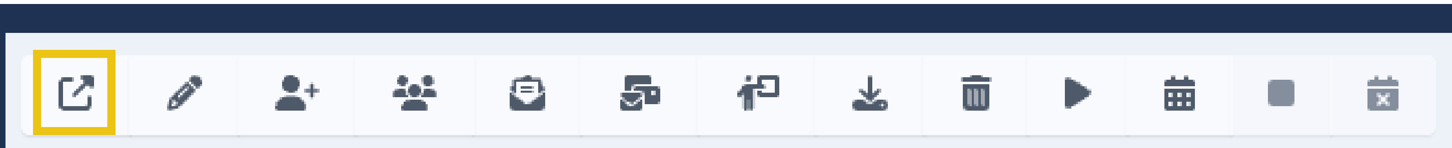
Will navigate to your assessment dashboard.



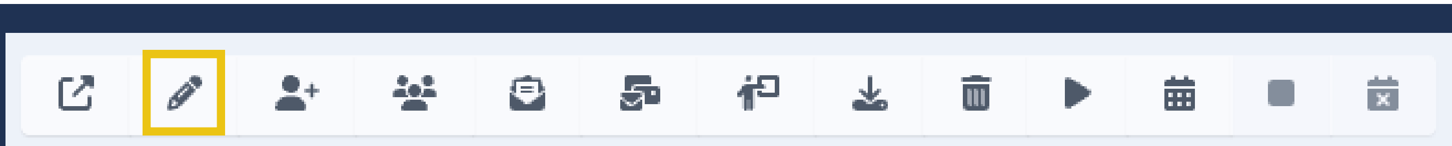
Will open the assessment creation window.



Will navigate to the homepage.



Allows you to preview the survey as participants would see it.



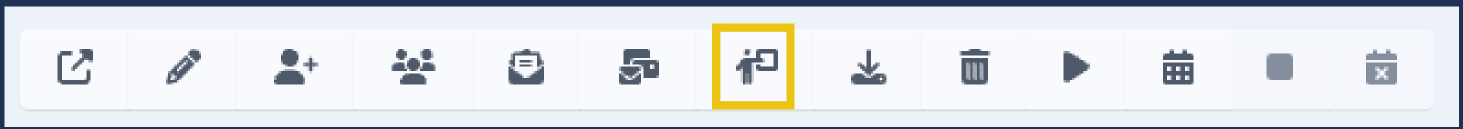
Edit the survey name. This is the name for the assessment that will appear in your personal dashboard, the participant’s dashboards and the subject line of the email participants receive

Manually add a participant.

Upload a participant list.

Edit the content of the email participants will receive when the assessment opens. This information will be shared as the first line of the email, followed by the assessment link.

Send an email reminder to all participants that have not completed the assessment.



Add an assessment manager. This is another person with access to the dashboard, can manage participants, and see scores and feedback.

Download the data from participants’ responses.

Delete the assessment and all responses. Note, this cannot be reversed.

Start the survey. Assessment will open immediately after following the prompts.

Schedule the start of the survey. Assessment will open automatically on the date and time selected.

End the survey. Note, this button will only become available once the assessment has begun.

Schedule the end of the survey. After the selected date and time, participants will no longer be able to complete the assessment. Note, this button will only become available once the assessment has begun.