



# **Creating and Managing Assessments on ITPMetrics.com**

# **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 an Assessment**

**Add Participants**

**Customize the Assessment Details**

**Starting the Assessment**

**Ending the Assessment**

**Approving Feedback**

**Reviewing the Results**

**Trouble Shooting**

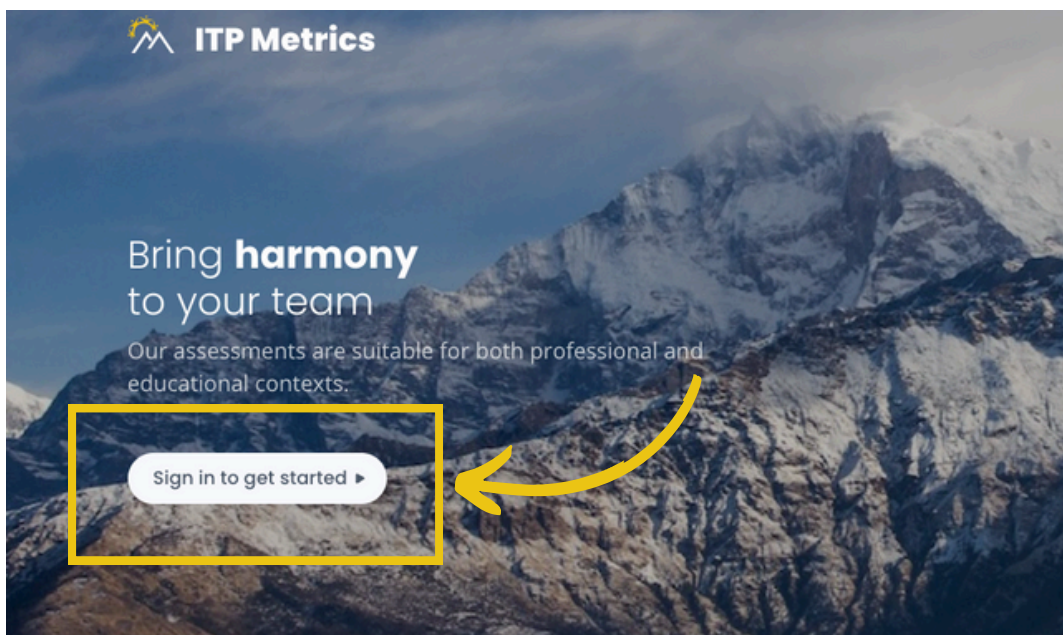
**Individual Assessments**

**Quick Guide: Navigating your Dashboard**

## 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.

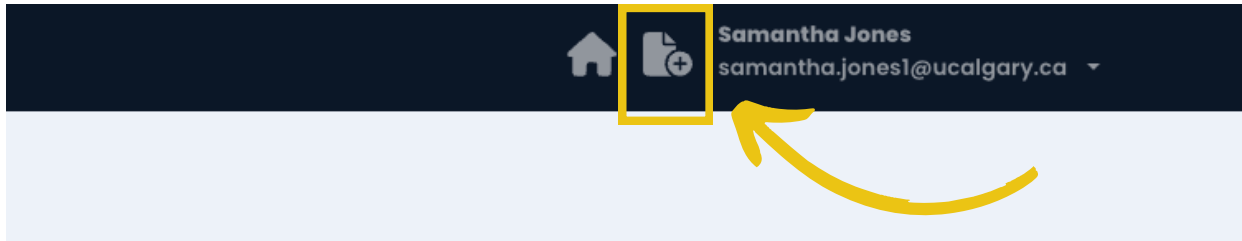
A screenshot of the ITP Metrics sign-in form. The form is white and has a title "Sign in". Below the title, it says "We will send you a one-time access link to your email." There is an input field containing the email address "samantha.jones1@ucalgary.ca". Below the input field, a small line of text reads "This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply." At the bottom right of the form is a dark blue button labeled "Sign in". A yellow rectangular box highlights the input field and the button. A yellow curved arrow points from the text "After entering your email address..." to the "Sign in" button.

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!

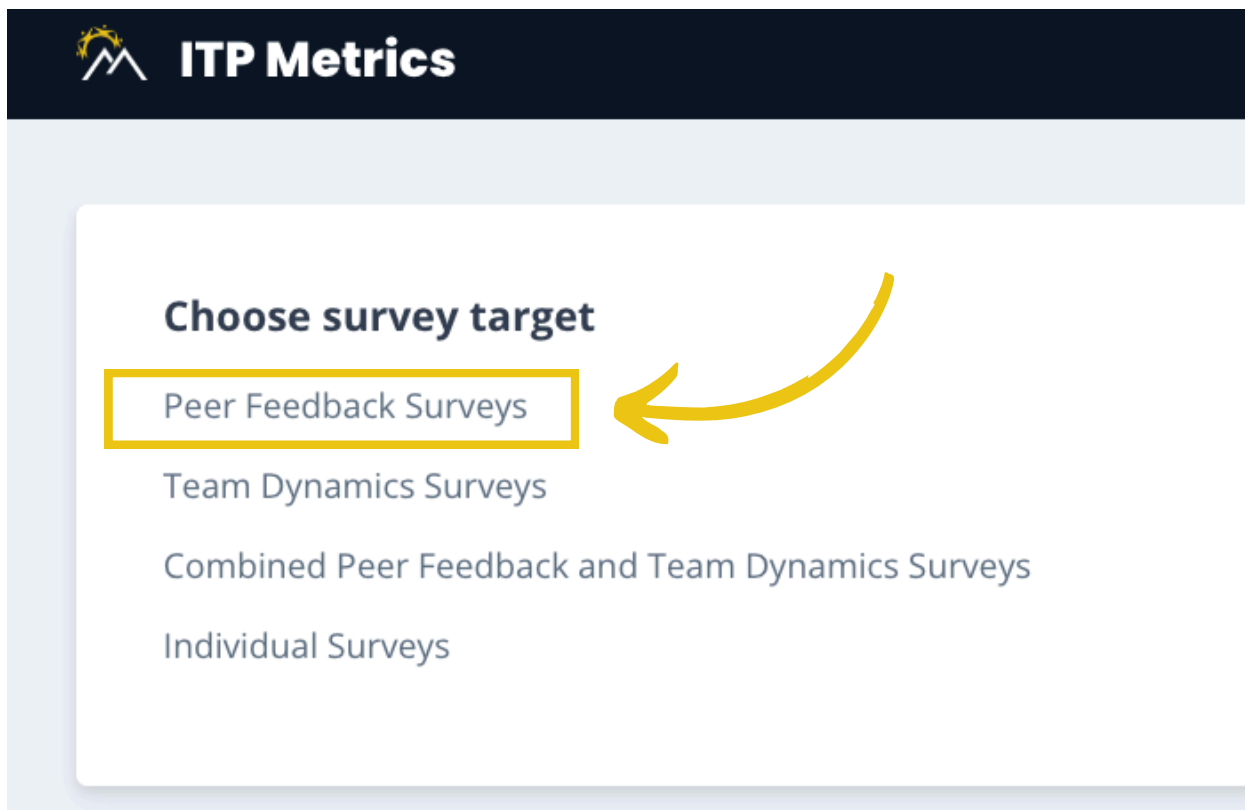
## Select an Assessment

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



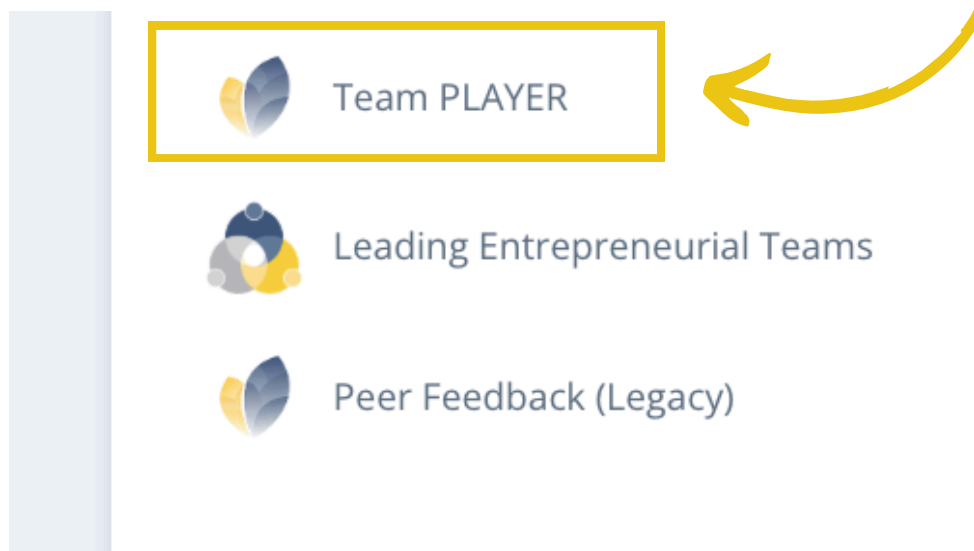
Then select a survey target. For this example, we will choose the Peer Feedback option which is a team-based assessment.

*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.

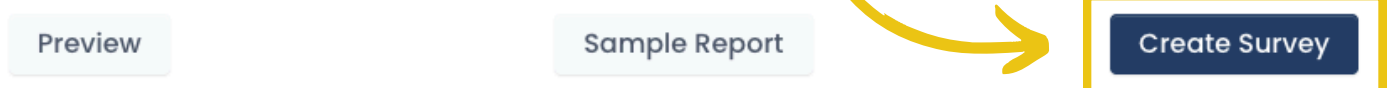
Here we will walk through creating the Team PLAYER assessment, which is our updated Peer Feedback tool but the assessment creation steps are the same for all team-based assessments.



## Team PLAYER

PEER SURVEY

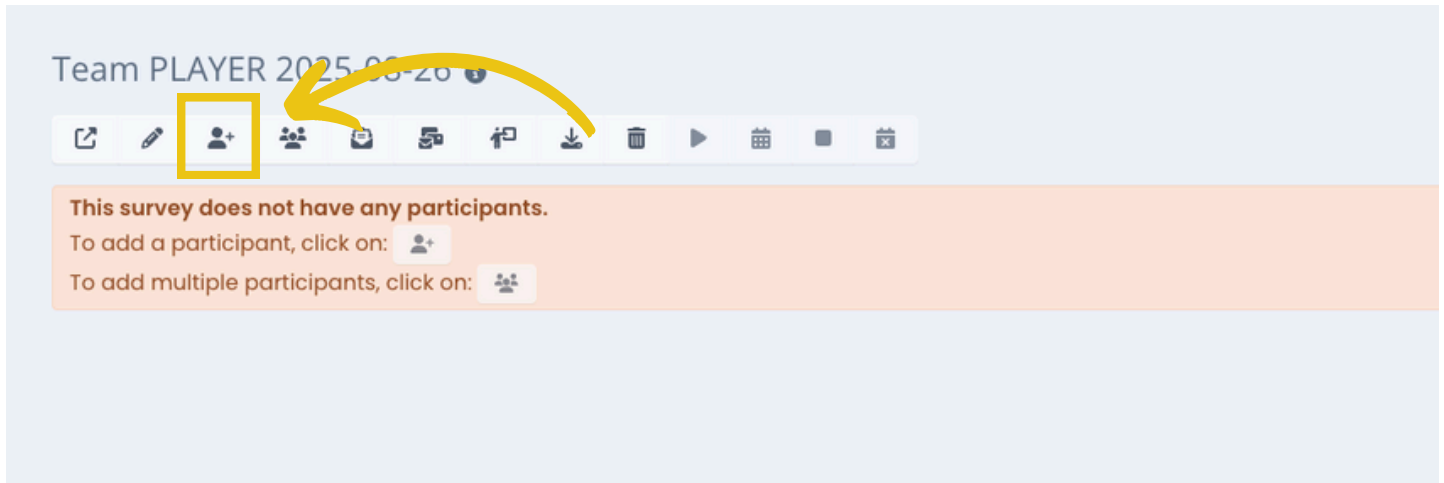
This assessment provides team members insights into their teamwork competencies and how to become a stronger team PLAYER. A personalized report provides feedback on team member's strongest and developing competencies, along with suggested improvement behaviors.



# 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

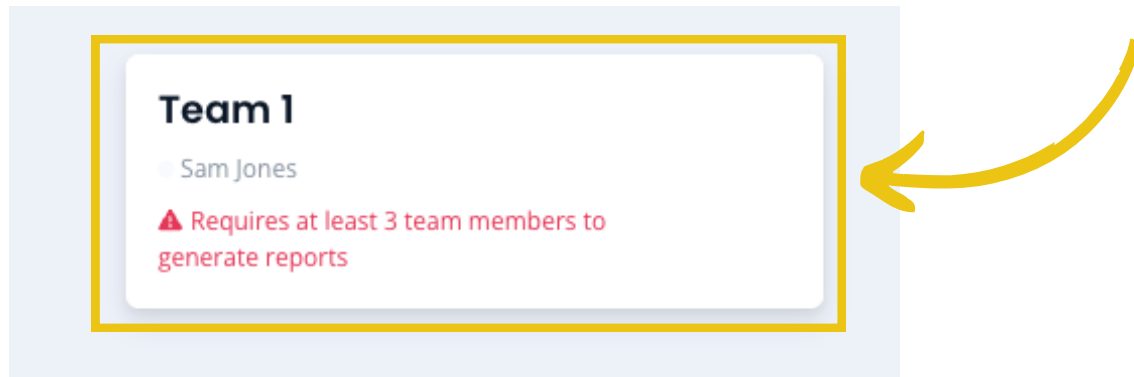
A screenshot of a form titled 'Add a participant'. The form has four input fields: 'First name' with the value 'Sam', 'Last name' with the value 'Jones', 'Email' with the value 'samantha.jones1@ucalgary.ca', and 'Team' with the value '1'. At the bottom of the form are two buttons: 'Cancel' and 'Confirm'. The 'Confirm' button is highlighted with a yellow square. A yellow arrow points from the 'Team' field to the 'Confirm' button.

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

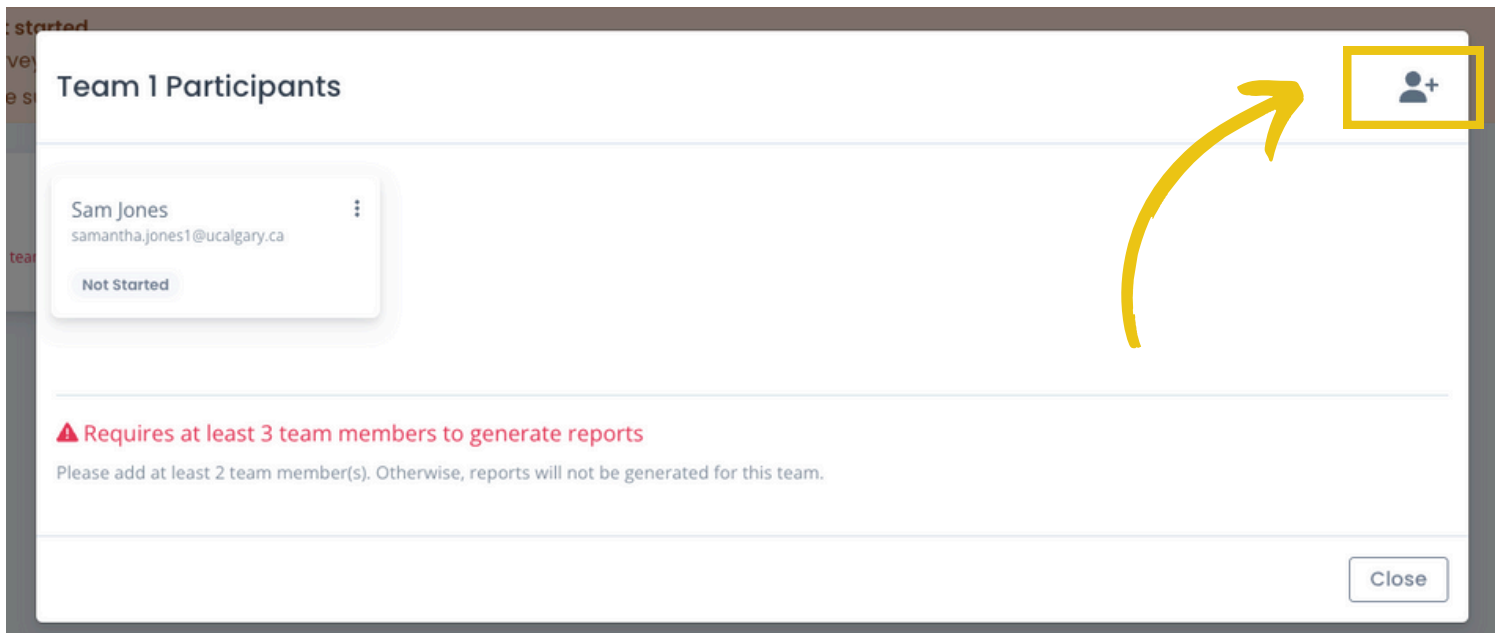
*Hint:* Make sure you use participant's preferred names as the name entered here is the name their team members will see when providing feedback.

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.


### Upload participant list

Please upload an Excel or CSV file and ensure that your list aligns with the example demonstrated in the image below.

Just trying out the survey? [Click here to use a demo list](#)

	A	B	C	D
1	Last Name	First Name	Email	Team
2	August	Adam	adam.august@calpoly.ca	1
3	Becker	Dorothy	dorothy.becker@calpoly.ca	1
4	Chis	Catherine	catherine.chis@calpoly.ca	B
5	Dine	Dorothy	dorothy.dine@calpoly.ca	B



 **Select a file**

**Please select a file.**

Cancel

Confirm



## 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

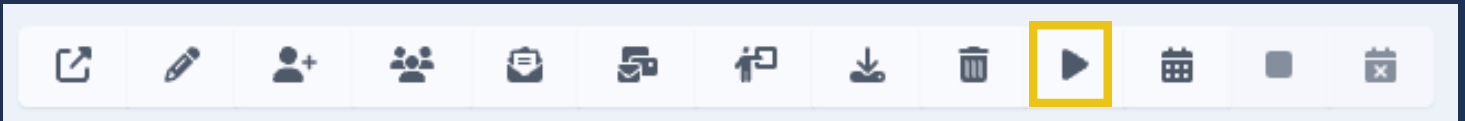


Add an assessment manager. This is another person with access to the dashboard, can manage participants, and see scores and feedback.

# 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.

### Start the survey

This will start the survey and all participants will be sent an email notification.

**Please select when you'd like the survey reports to be released:**

☒ **Wait for team completion**  
Each team member needs to complete their survey. Reports will be released automatically.

☐ **Only after I review and approve the feedback**  
Each team member needs to complete their survey and the feedback needs to be reviewed and approved.

CancelConfirm

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.

### Schedule the survey

This will schedule the survey to start and then send email notifications to all participants at the given time.



A calendar for September 2025 with the 4th highlighted. To the right is a time selection list with 1:00 PM highlighted. A yellow arrow points from the 4th of the month to the 1:00 PM time slot.

September 2025							Time
Su	Mo	Tu	We	Th	Fr	Sa	
31	1	2	3	4	5	6	12:35 PM
	8	9	10	11	12	13	12:40 PM
14	15	16	17	18	19	20	12:45 PM
21	22	23	24	25	26	27	12:50 PM
28	29	30	1	2	3	4	12:55 PM
							1:00 PM
							1:05 PM

September 4th, 2025 at 1:00 PM

Please select when you'd like the survey reports to be released:

- ☐ Wait for team completion  
Each team member needs to complete their survey. Reports will be released automatically.
- ☒ Only after I review and approve the feedback  
Each team member needs to complete their survey and the feedback needs to be reviewed and approved.

Cancel

Confirm

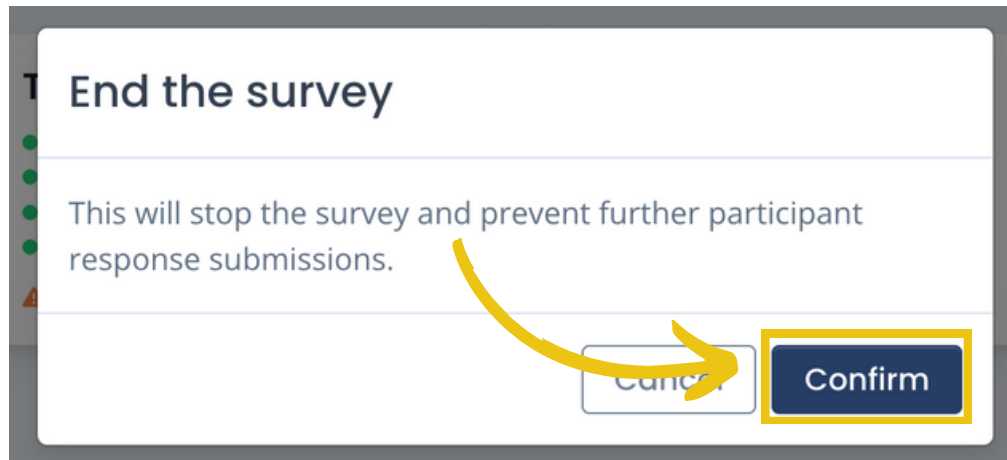
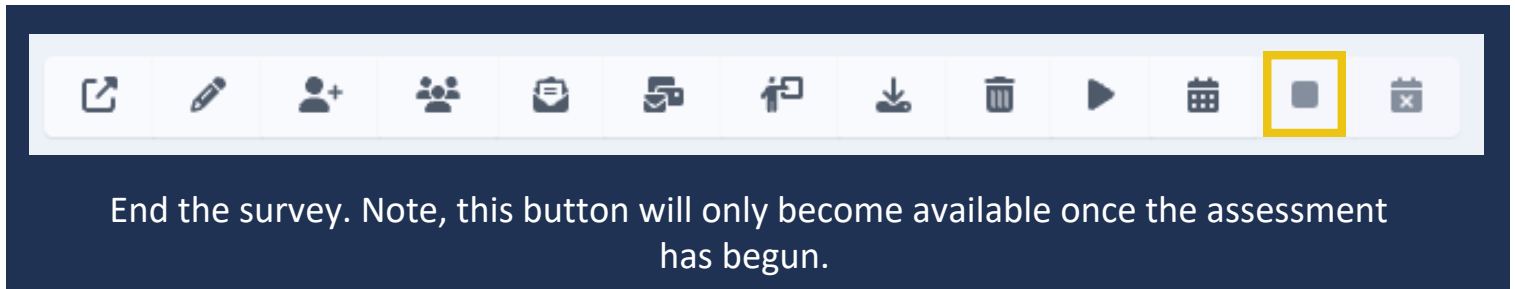
If you would like the assessment to start at a specific date and time, you can schedule the start of the assessment. Select the date and time and then select how the reports will be released.

*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



*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.

### Schedule End Time

This will schedule the survey to end and prevent further participant response submissions.



A calendar for September 2025 with a time selection list. A yellow arrow points to the date '12' in the Friday column. The time '1:00 PM' is selected in the list.

September 2025							Time
Su	Mo	Tu	We	Th	Fr	Sa	
31	1	2	3	4	5	6	12:50 PM
	7	8	9	10	11	12	12:55 PM
	13	14	15	16	17	18	1:00 PM
	19	20	21	22	23	24	1:05 PM
	25	26	27	28	29	30	1:10 PM
	1	2	3	4	5	6	1:15 PM

September 12th, 2025 at 1:00 PM

Please select when you'd like the survey reports to be released:



Wait for team completion

Each team member needs to complete their survey. Reports will be released automatically.



Only after I review and approve the feedback

Each team member needs to complete their survey and the feedback needs to be reviewed and approved.

Cancel

Confirm

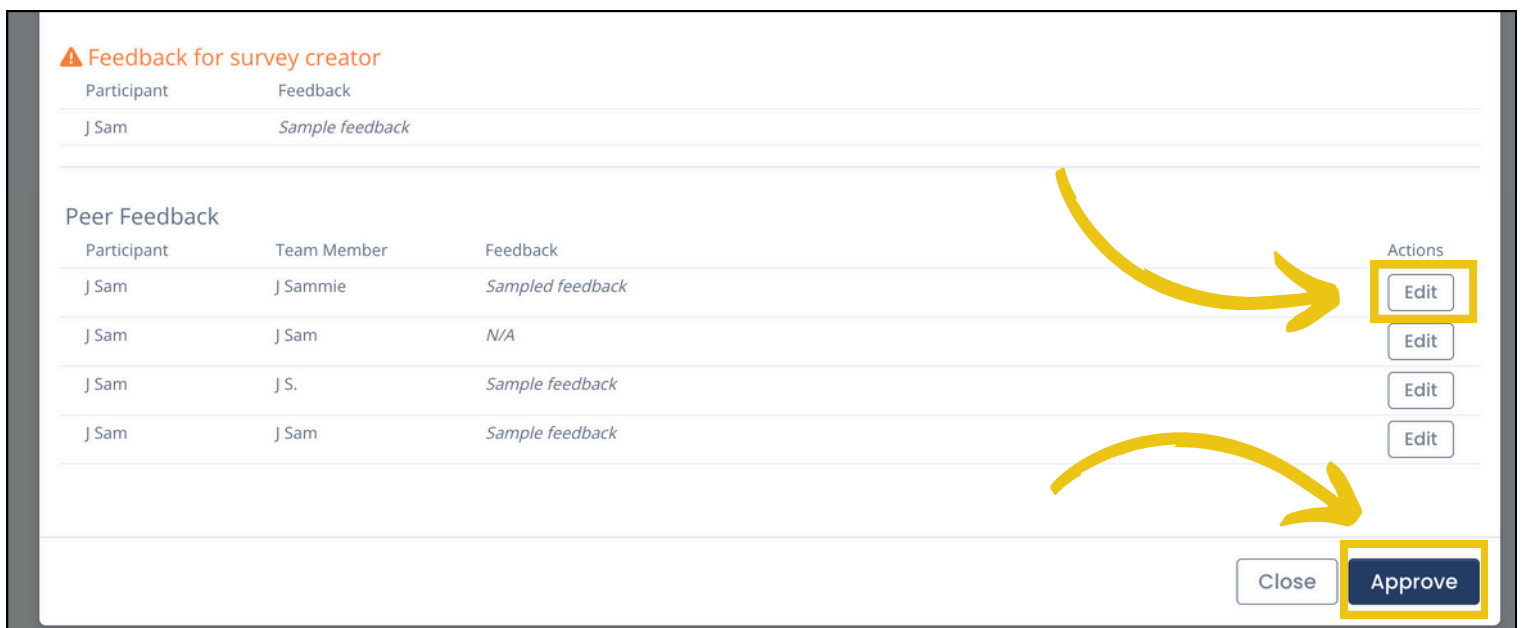
If you would like the assessment to end at a specific date and time, you can schedule the end of the assessment. Select the date and time, and then confirm how the reports will be released.

*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.



The screenshot shows a web interface for reviewing feedback. At the top, there is a section titled "Feedback for survey creator" with a warning icon. Below this is a table with two columns: "Participant" and "Feedback". The first row shows "J Sam" and "Sample feedback".

Below the first table is a section titled "Peer Feedback". It contains a table with three columns: "Participant", "Team Member", and "Feedback". The first row shows "J Sam", "J Sammie", and "Sampled feedback". The second row shows "J Sam", "J Sam", and "N/A". The third row shows "J Sam", "J S.", and "Sample feedback". The fourth row shows "J Sam", "J Sam", and "Sample feedback".

To the right of the "Peer Feedback" table is an "Actions" column with four "Edit" buttons. A yellow arrow points from the first "Edit" button to the "Approve" button at the bottom right. Another yellow arrow points from the "Approve" button to the "Close" button.

At the bottom right, there are two buttons: "Close" and "Approve". The "Approve" button is highlighted with a yellow box.

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

**Team 1**

- 3.67 Victor Stockman
- 3.73 James Gomez
- 3.50 Hans Watts
- 3.77 Michael Kerstetter

Feedback for survey creator

**Team 2**

- 3.55 Carlota Baker
- 3.55 Kim Gunter
- 3.72 Jack Taylor
- 3.77 Estella Bunting

Feedback for survey creator

**Team 3**

- 3.55 James Lee
- 3.43 Tabitha Kutz
- 3.77 Ronald Gonzales
- 3.33 Theodora Van

Feedback for survey creator

**Team 4**

- 3.62 Constance Friley
- 3.23 Melody Detrick
- 3.43 Jo Mier
- 3.33 Patricia Mullican

Feedback for survey creator

**Team 5**

- 3.62 Katherine Young
- 3.45 Jessica Frederick
- 3.43 James Delaughter
- 3.17 James Buster

Feedback for survey creator

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.

**Team 1**

- 3.67 Victor Stockman
- 3.73 James Gomez
- 3.50 Hans Watts
- 3.77 Michael Kerstetter

Feedback for survey creator

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.

The screenshot displays the 'Team 1 Participants' interface. At the top, four participant cards are shown, each with a name, email, a 'Completed' status, and a score. Below these cards are two feedback sections, both highlighted with yellow boxes and pointed to by yellow arrows. The first section, 'Feedback for survey creator', contains a table with participant names and sample feedback. The second section, 'Peer Feedback', contains a table with participant names, team members, and sample feedback. A 'Close' button is located at the bottom right of the interface.

Participant	Feedback
Victor Stockman	Sample feedback from Victor to survey creator
James Gomez	Sample feedback from James to survey creator
Hans Watts	Sample feedback from Hans to survey creator
Michael Kerstetter	Sample feedback from Michael to survey creator

Participant	Team Member	Feedback
Victor Stockman	James Gomez	Sample feedback from Victor to James
Victor Stockman	Hans Watts	Sample feedback from Victor to Hans
Victor Stockman	Michael Kerstetter	Sample feedback from Victor to Michael

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

The screenshot shows a toolbar with various icons. The download icon, represented by a downward arrow, is highlighted with a yellow box. Below the toolbar, the text 'Download the data from participants' responses.' is displayed.

Download the data from participants' responses.

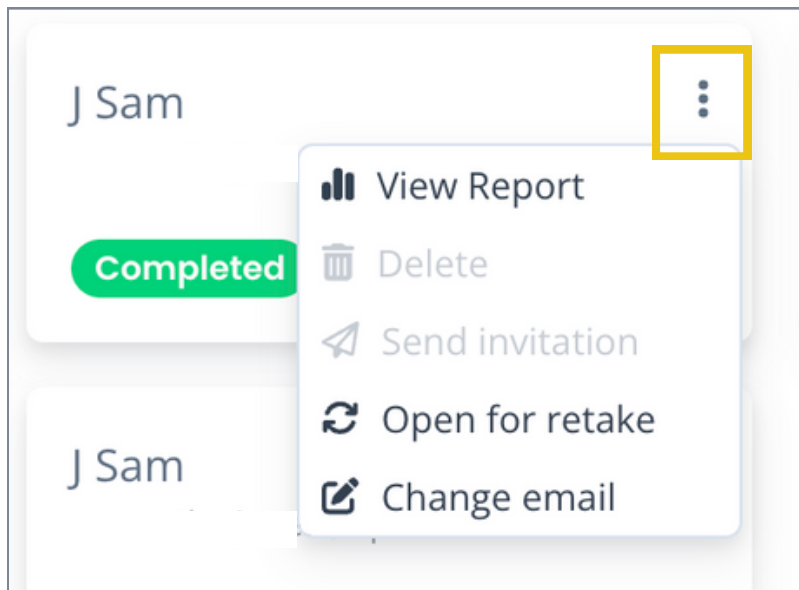
If you prefer to review the results in spreadsheet format, you can download participant responses by selecting the download button.



## 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

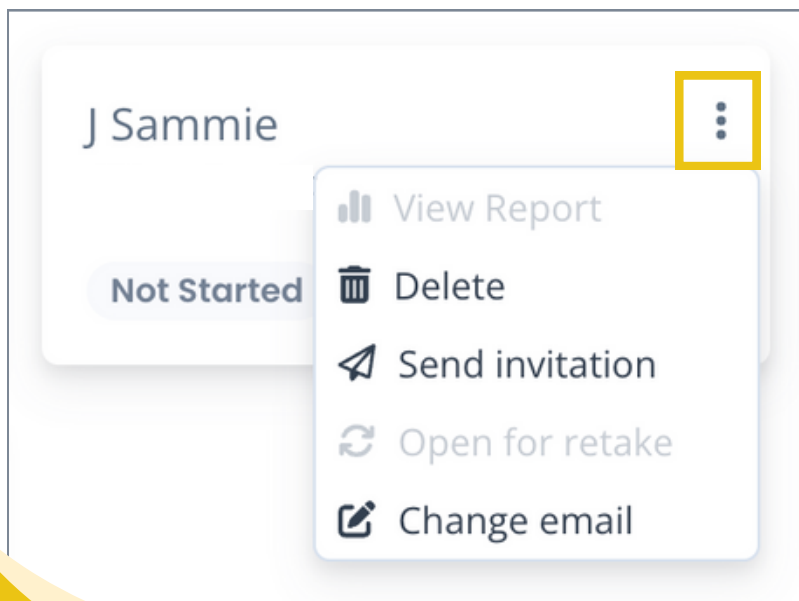


**View Report:** View the participant's report in a new window

**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

## Take Survey

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

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

OR

Take Survey

Did you want to take the survey just for yourself?

## Quick Guide: Navigating your Dashboard

 **ITP Metrics**



Samantha Jones  
samantha.jones1@ucalgary.ca ▾

Will navigate to your assessment dashboard.

 **ITP Metrics**



Samantha Jones  
samantha.jones1@ucalgary.ca ▾

Will open the assessment creation window.

 **ITP Metrics**



Samantha Jones  
samantha.jones1@ucalgary.ca ▾

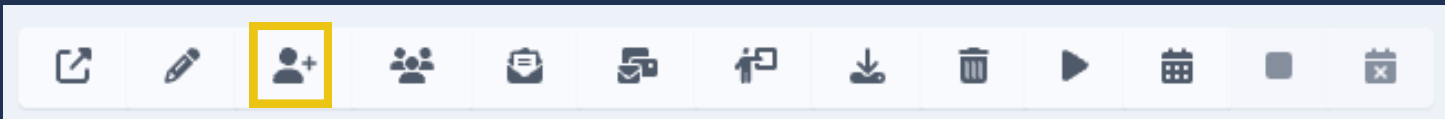
Will navigate to the homepage.



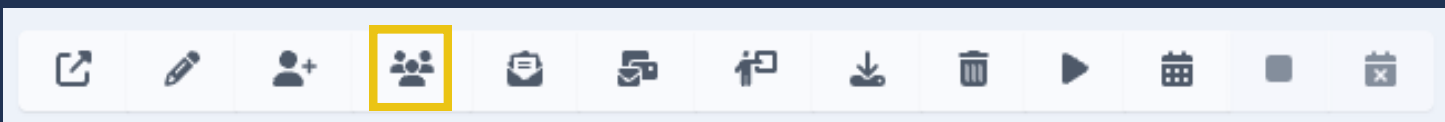
Allows you to preview the survey as participants would see it.



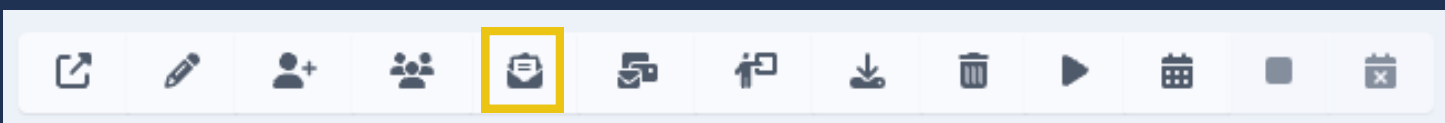
Edit the survey name. This is the name for the assessment that will appear in your personal dashboard, the participant's dashboards and the subject line of the email participants receive



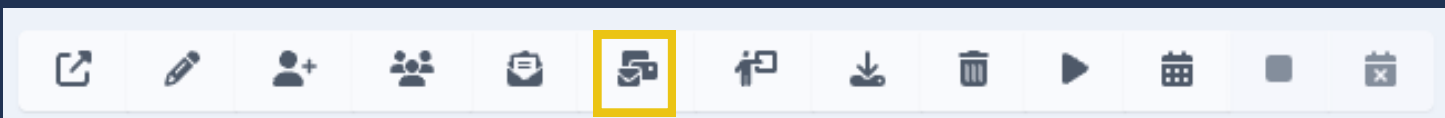
Manually add a participant.



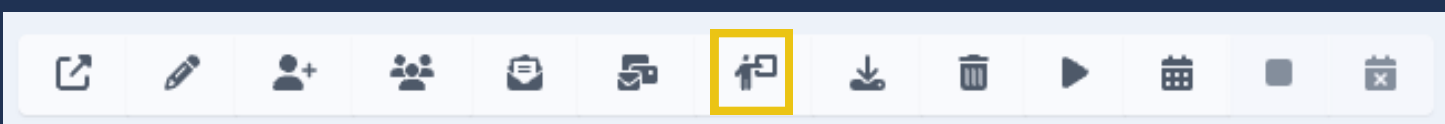
Upload a participant list.



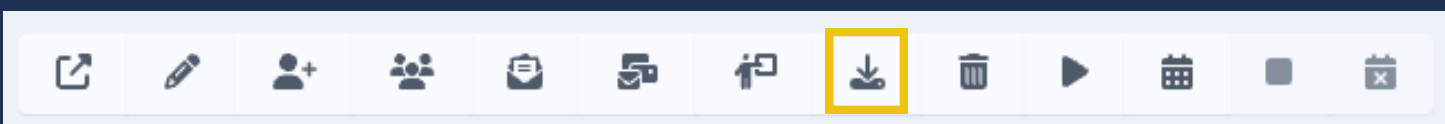
Edit the content of the email participants will receive when the assessment opens. This information will be shared as the first line of the email, followed by the assessment link.



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.



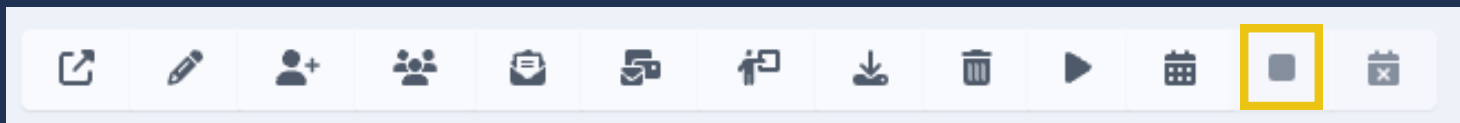
Delete the assessment and all responses. Note, this cannot be reversed.



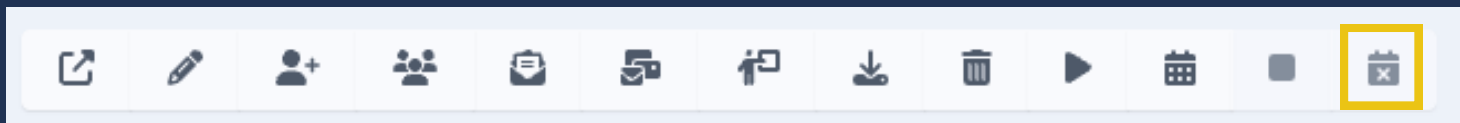
Start the survey. Assessment will open immediately after following the prompts.



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.