INSPIROMETER®
excite insight

Account Linking Guide
A basic guide to linking your account to a compiler

Welcome! Tag-Check's Inspirometer system is a new tool for gathering feedback from our customers (external, internal, and even ourselves) in order that we can improve our ways of working.

This simple guide is intended to help you link your account to a compiler so that you can link your data to that of your team and work together to improve how you work.

Once you have received your invitation email, you will find a link in it which says 'Click here to link your account with …' - indicated by the red arrow (1).

Clicking this link will take you to your account page, where you will need to login if you have not already done so. It will then open up the page shown overleaf.

When do you need to link?

Most accounts are created already linked to a compiler, but sometimes people set up their own accounts independently, or they leave one organisation or department to join another.

In both of these cases, you may want to link back into your new organisation so that you can share data with your colleagues.

However, you can only link your account in response to an invitation from the administrator of the compiler, which will arrive in the form of an email like the one on the right.

Hey there...

Company XYZ would like you to join their Compiler account.

Simply click the link below to join the compiler and start to share your data with Company XYZ

You will then be asked to login to your account if you are not already, and confirm that you wish to be linked. Please make sure you login using the email address yourname@youremail.ext

Click here to link your account with Company XYZ **← 1**

How do you start the process?

If you have not received an invitation email, your first step is to contact your administrator and ask them to invite you to join the compiler.

Checking your right to link

Please make sure that you read and understand the instructions for each step of the linking process (2) -

most of the problems we encounter in linking occur because people glance at the instructions, click a button or two and then get on with the next task.

If you are happy you understand the process, and that you have not been sent the invite in error (2) then please check that you are being linked into the right department (3) and confirm that you are legitimately linking your account, by ticking the box (4).

Ticking the box will activate the 'continue' button (5) which will take you to the next step of the process, shown below right.
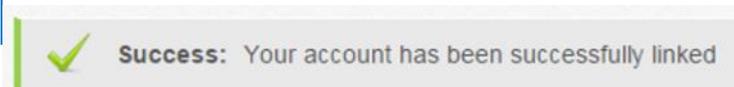
Categorising your Tags

Your data is your data. Wherever your account goes, your data goes. However, your new compiler may have a different way of categorising its data than you were using previously, and so your next step is to make sure that your data will be added into the correct buckets.

This is achieved by dragging items from your current list of Tags on the left (6) and dropping them into the spaces under the relevant category on the right (7). Only when you have allocated all of your Tags in this way, will you be able to link your account (8)

Confirming a successful link

When you have successfully linked your compiler, you will see the message shown below. If this message does not appear on your account page, you may need to repeat the steps shown above.

Confirm Details

You have begun a process which will link your data with that of the organisation which sent you the invite link. If this is an error, please select cancel belo... ...nform the person who sent you the invitation link of the issue.

CANCEL

Company - Company XYZ

Your Department: • Test_CS

Company - Company XYZ

Declaration : ☐ I confirm that I am a empl... ...mpany XYZ and that I am a member of the department...

Submit : TO CONTINUE, PLEASE TICK THE CHECKBOX ABOVE

Category Organiser

Final Step
Please re-assign your current tags to the new Compiler Categories. Simply drag tags from your current categories on the left, to the new compiler categories associated with your company on the right. When you are finished, click t... ...y Account" button.

LINK MY ACCOUNT

✏ Your Categories

Miscellaneous/Uncategorised
🏷 How am I doing?
🏷 Test Tag 2
🏷 Incentive Test Tag

Personal service & support
🏷 Test1
🏷 Interim Feedback Tag

✏ Compiler Categories

Miscellaneous/Uncategorised
Drop Tags Here

Personal service & support
Drop Tags Here

Delivering insight: Papers, Reports, Analysis

Was this helpful?
Single click feedback:

If this document has been circulated to you as part of a corporate implementation of the Inspirometer ...

Your internal support contact is …

Name: _____

Email: _____

Phone: _____

✓ Success: Your account has been successfully linked

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