



the index

USER GUIDE

INDIVIDUAL + 360

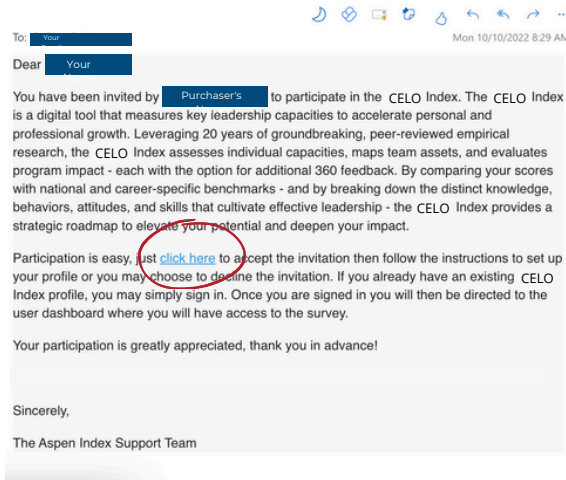
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**For Individual + 360 Users*

OPTION 1: ACCEPT INVITATION VIA EMAIL

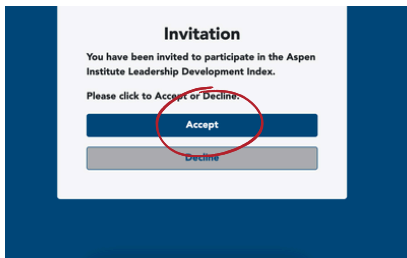
1



You will receive an email from the Index. Select "click here" to begin accepting your invitation.*

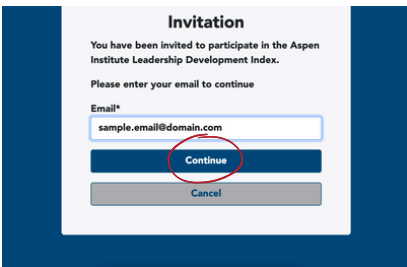
**Emails may initially go to Spam folder.*

2



Select "Accept."

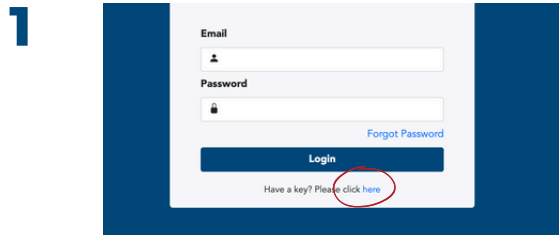
3



Insert the email in which you received your invitation, then press "Continue."

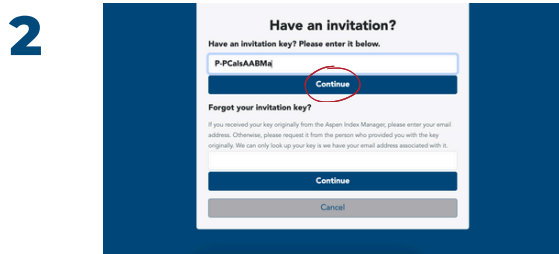
From this point, if you do not have an account created, you will begin the account creation process. If you already have an Index account, the site will prompt you to log in.

OPTION 2: REDEEM KEY DIRECTLY



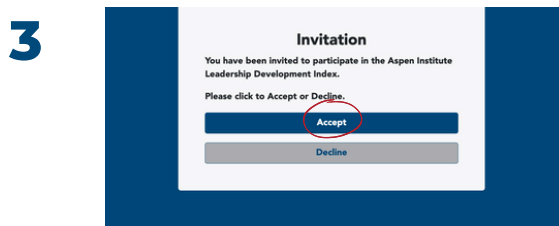
Once you receive your key (code), visit my-index.expandingleadership.org/haveAKey

Select "Have a key? Please click here."

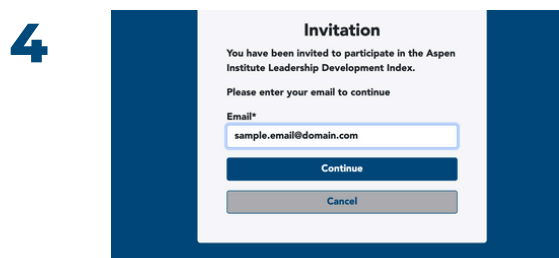


Input your key into the box that reads "Have an invitation key? Please enter it below."

Then, select "Continue."



Select "Accept."



Input your email and select "Continue."

From this point, if you do not have an account created, you will begin the account creation process. If you already have an Index account, the site will prompt you to log in.

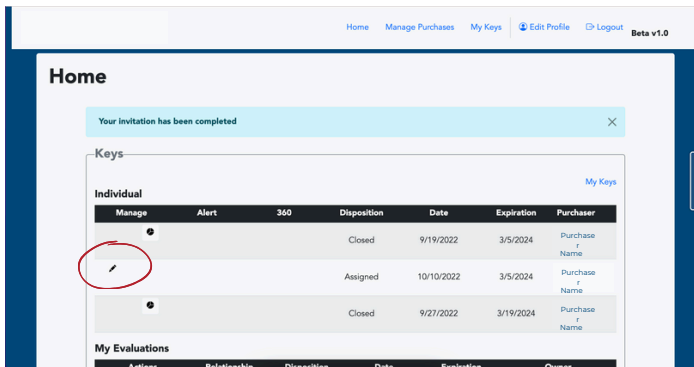
CONFIGURE YOUR INDEX

For both Index: Individual and Index: Individual + 360

If your Index purchaser did not select [capacities](#) for you, you will have the option to select your capacities as the user (Step 2).

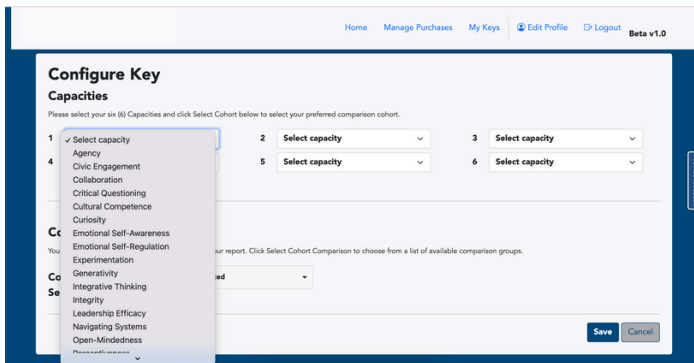
All users will be asked to select their cohort comparison (Step 3).

1



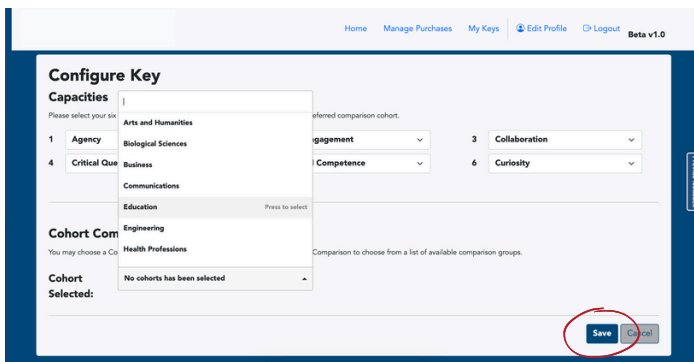
Click the key icon to configure your key.

2



Select the six capacities that you would like assessed.

3

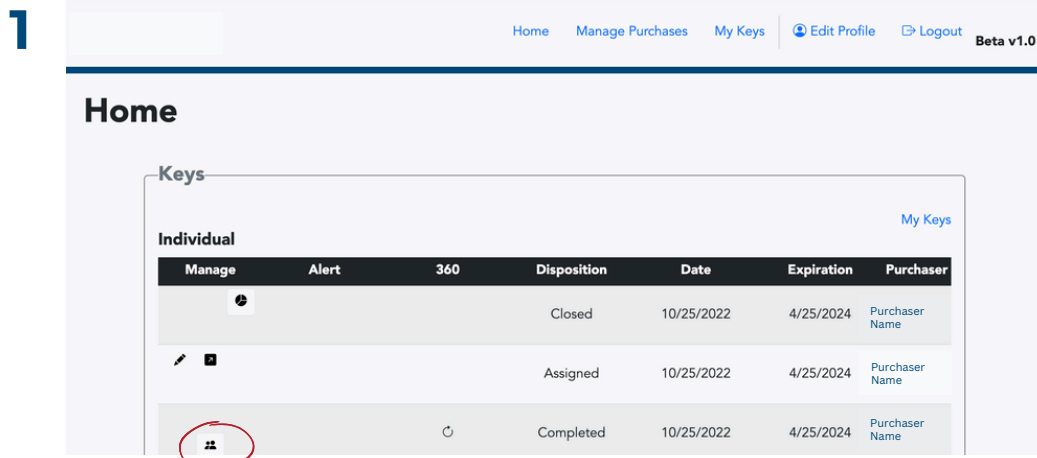


Select your cohort comparison group, review your selections, and click "Save."

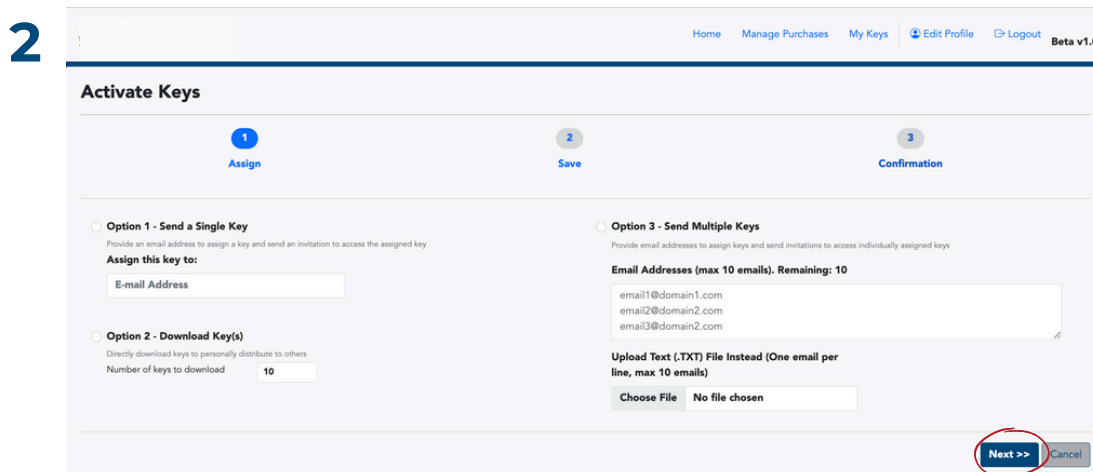
A cohort comparison group is a tool to assess your results in comparison to other Index users in your selected field.

ADD YOUR EVALUATORS: INDIVIDUAL + 360

Once your key is configured for capacities and cohort comparison groups, you will have the option to add your evaluator(s).



Click the person icon to add your evaluator(s).



There are four options to invite your evaluators:

- Option 1: Send a single key to one evaluator.
- Option 2: Download keys / codes to send to evaluator(s).
- Option 3: Send multiple keys at one time by inputting multiple evaluator emails OR uploading a .TXT file with evaluator emails.

Click "Next."

ADD YOUR EVALUATORS: INDIVIDUAL + 360

3

Home Manage Purchases My Keys Edit Profile Logout Beta v1.0

Activate Keys

1 Assign 2 Save 3 Confirmation

Email	Relationship
EVALUATORS EMAIL	<input type="radio"/> Supervisor <input type="radio"/> Peer <input type="radio"/> Supervisee <input checked="" type="radio"/> Other

<< Previous **Activate** Cancel

Select the relationship for each evaluator, then click "Activate."

4

Home Manage Purchases My Keys Edit Profile Logout Beta v1.0

Activate Keys

1 Assign 2 Save 3 Confirmation

The following emails were assigned:

EVALUATORS EMAIL (ROLE)

Done

Review your selections, then click "Done."

NOTE

If you uploaded an evaluator's email into the system, they should receive an email such as the one shown to the right.

Dear **EVALUATORS NAME**

You have been recognized as a valued colleague of **NAME** and as such are being invited to provide them with a 360 evaluation through the CELO Index Manager

A CELO Index 360 evaluation provides honest feedback that allows a keyholder to uncover unknown strengths and opportunities.

Providing an evaluation is easy, simply [click here](#) to accept or decline the invitation. If you accept, please follow the instructions to access the 360 survey. If you decline, **NAME** will receive an email informing them of your decision.

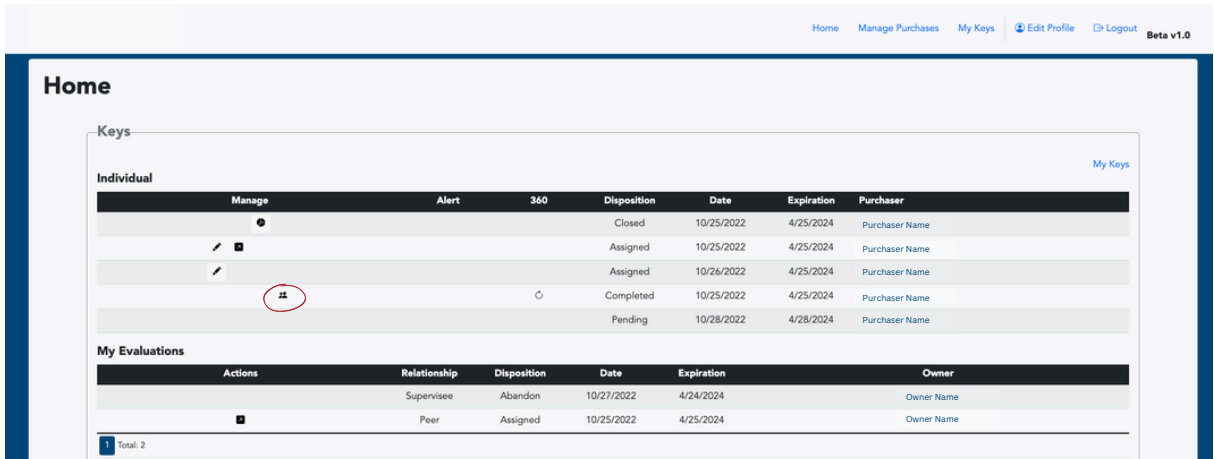
We appreciate your time and thank you in advance for your help with this evaluation.

Sincerely,

The CELO Index Support Team

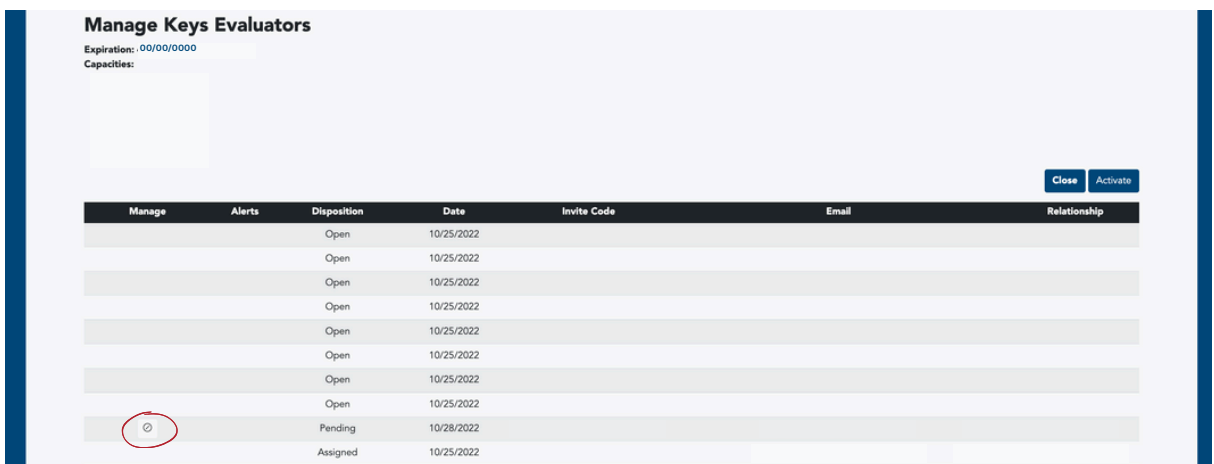
RECLAIM EVALUATOR KEY: INDIVIDUAL + 360

1



Click the person icon to manage your evaluator(s).

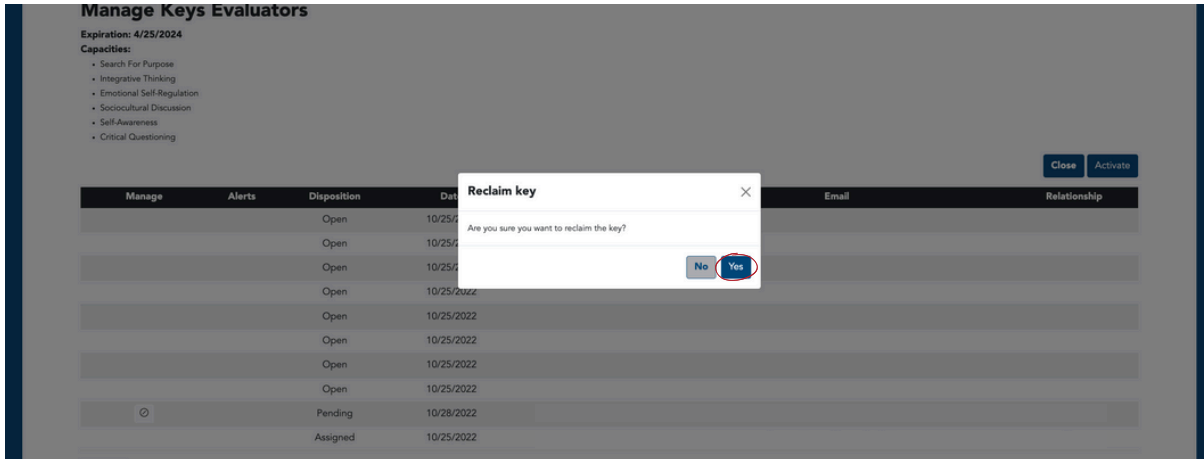
2



Click the circle icon to begin reclaiming your evaluator key.

RECLAIM EVALUATOR KEY: INDIVIDUAL + 360

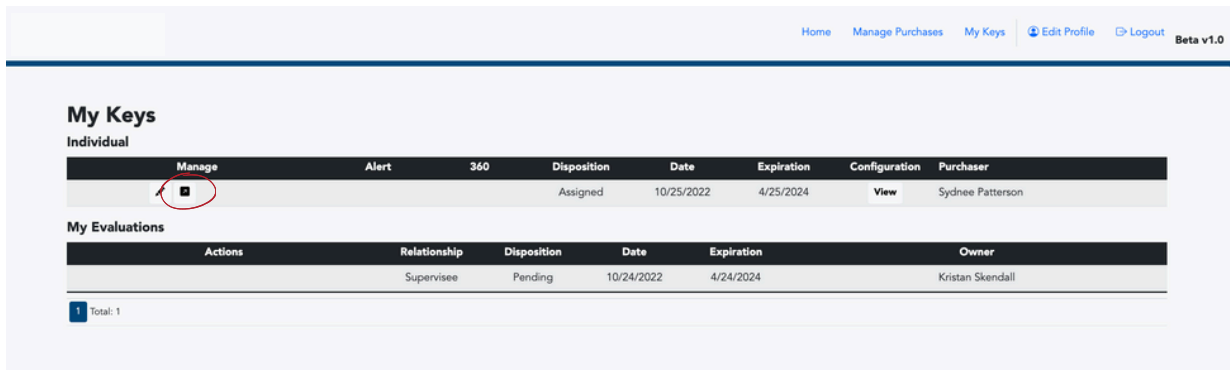
3



Click the "Yes" button to reclaim your evaluator key.

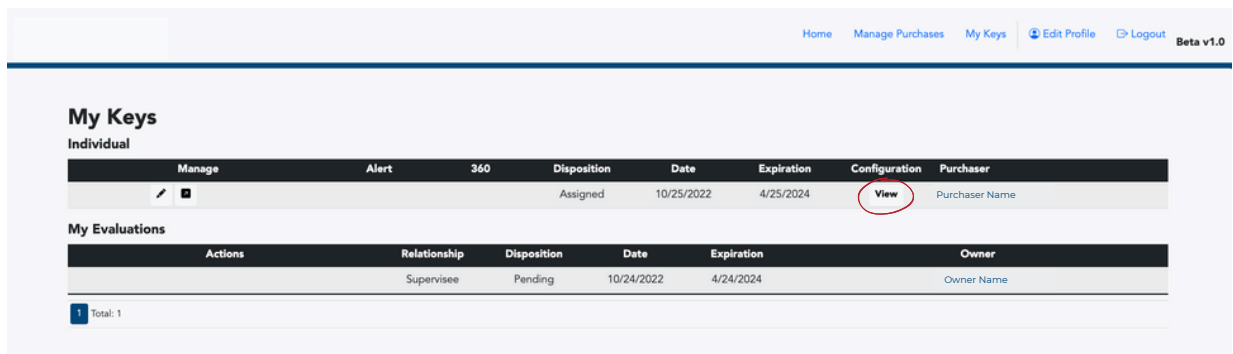
TAKE THE INDEX

1



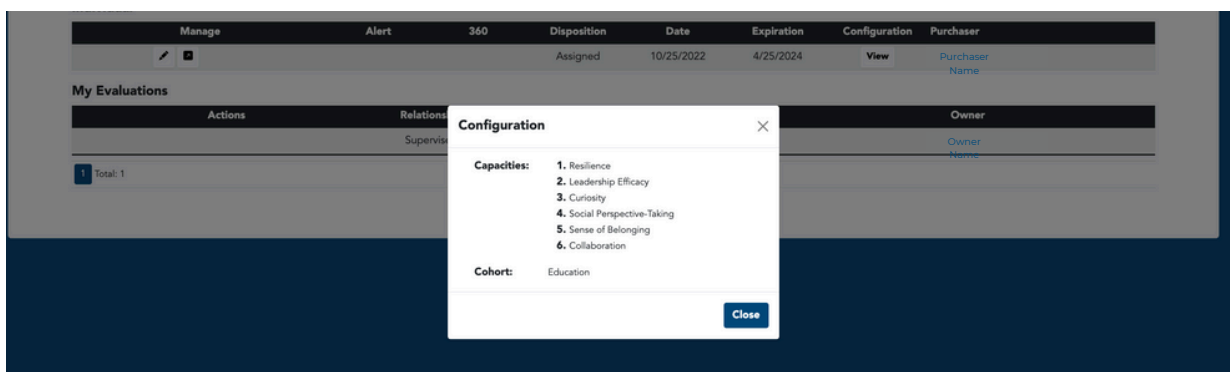
Click the arrow icon to begin your Index.

NOTE



If you would like to review the capacities you (or someone else) chose, click the "View" button.

This will give you a pop-up overviewing the selected capacities and cohort comparison group.



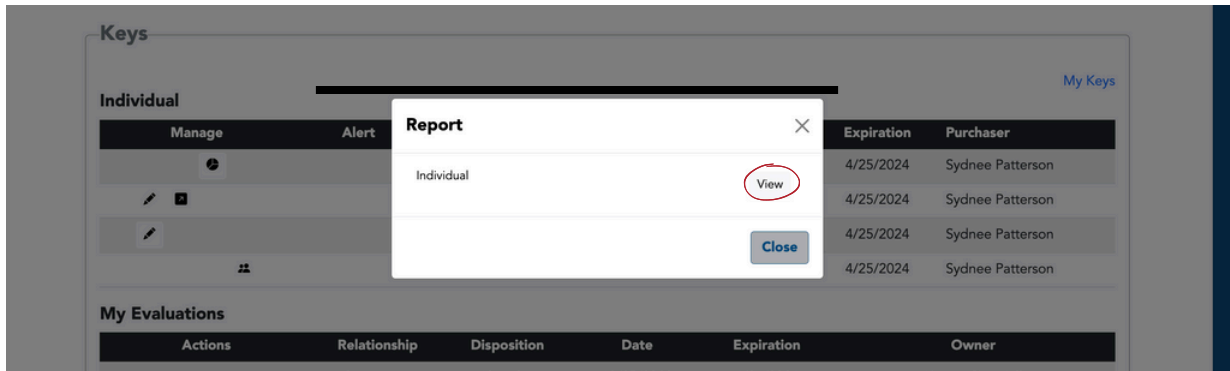
VIEW YOUR INDEX: INDIVIDUAL REPORT

1



Click the pie chart icon to begin the process of viewing your Index report.

2






Click the "View" button to view your Index report. The report will download as a PDF file.

VIEW YOUR INDEX: INDIVIDUAL + 360 REPORT

1

The screenshot shows the 'Home' dashboard with a navigation bar at the top containing 'Home', 'Manage Purchases', 'My Keys', 'Edit Profile', and 'Logout'. The main content area is titled 'Home' and contains a 'Keys' section. Under 'Keys', there is an 'Individual' table with columns: Manage, Alert, 360, Disposition, Date, Expiration, and Purchaser. The table contains five rows of data. A person icon in the 'Manage' column of the third row is circled in red. Below the 'Individual' table is a 'My Evaluations' table with columns: Actions, Relationship, Disposition, Date, Expiration, and Owner. It contains two rows of data. A 'Total: 2' indicator is visible at the bottom left of the 'My Evaluations' table.

Manage	Alert	360	Disposition	Date	Expiration	Purchaser
			Closed	10/25/2022	4/25/2024	Purchaser Name
			Assigned	10/25/2022	4/25/2024	Purchaser Name
			Assigned	10/26/2022	4/25/2024	Purchaser Name
			Completed	10/25/2022	4/25/2024	Purchaser Name
			Pending	10/28/2022	4/28/2024	Purchaser Name

Actions	Relationship	Disposition	Date	Expiration	Owner
	Supervisee	Abandon	10/27/2022	4/24/2024	Owner Name
	Peer	Assigned	10/25/2022	4/25/2024	Owner Name

Click the person icon (the same icon used to manage your evaluator(s)).

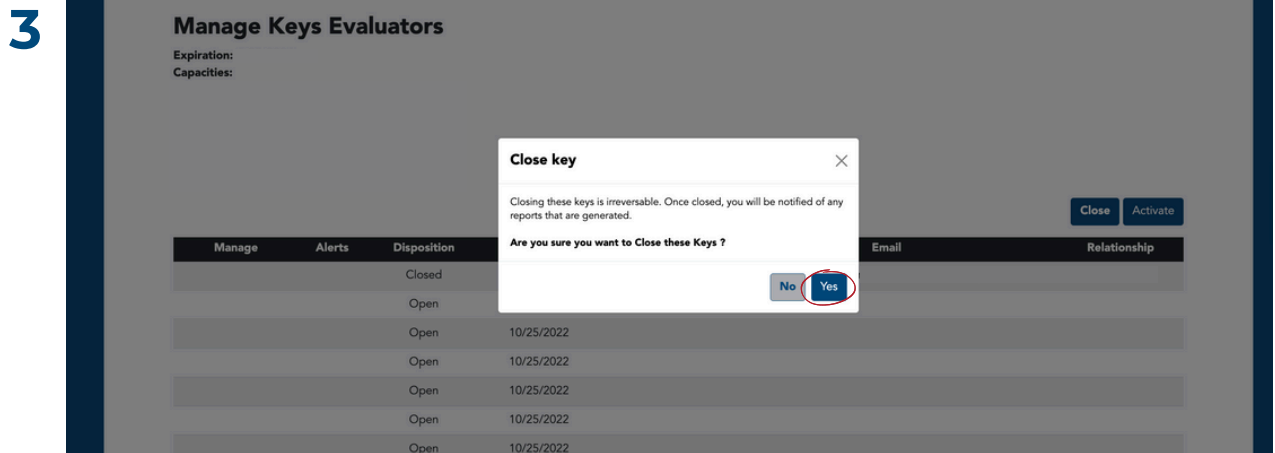
2

The screenshot shows the 'Manage Keys Evaluators' page. At the top, there is a navigation bar with 'Home', 'Manage Purchases', 'My Keys', 'Edit Profile', and 'Logout'. Below the navigation bar, there is a section for 'Expiration:' and 'Capacities:'. On the right side, there are two buttons: 'Close' and 'Activate'. The 'Close' button is circled in red. Below this is a table with columns: Manage, Alerts, Disposition, Date, Invite Code, Email, and Relationship. The 'Disposition' column has a 'Closed' entry, which is also circled in red. The table contains seven rows of data.

Manage	Alerts	Disposition	Date	Invite Code	Email	Relationship
		Closed	10/28/2022			
		Open	10/25/2022			
		Open	10/25/2022			
		Open	10/25/2022			
		Open	10/25/2022			
		Open	10/25/2022			
		Open	10/25/2022			

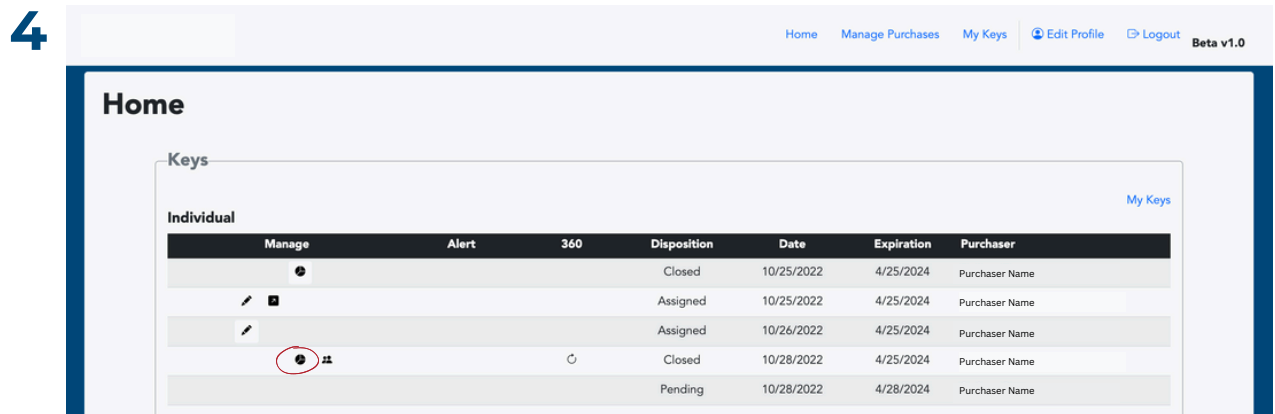
Click the "Close" button to close your Index report.

VIEW YOUR INDEX: INDIVIDUAL + 360 REPORT



Confirm that you would like to close your Index and begin processing your report by clicking "Yes."

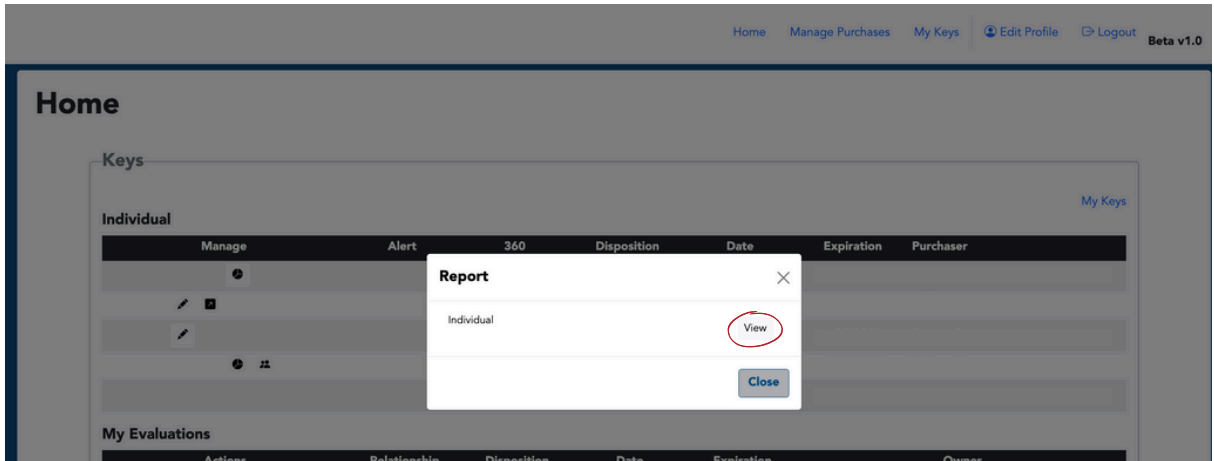
After you close your Index, evaluators will no longer be able to submit their responses.



Click the pie chart icon to begin the process of viewing your Index report.

VIEW YOUR INDEX: INDIVIDUAL + 360 REPORT

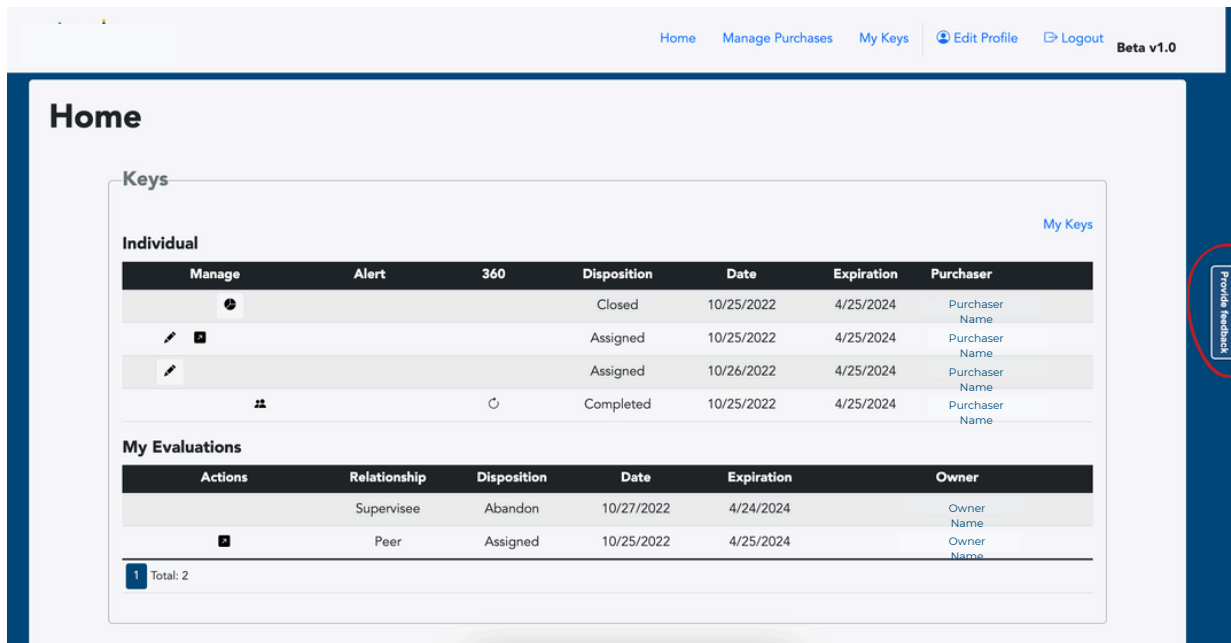
5



Click the "View" button to view your Index report. The report will download as a PDF file.

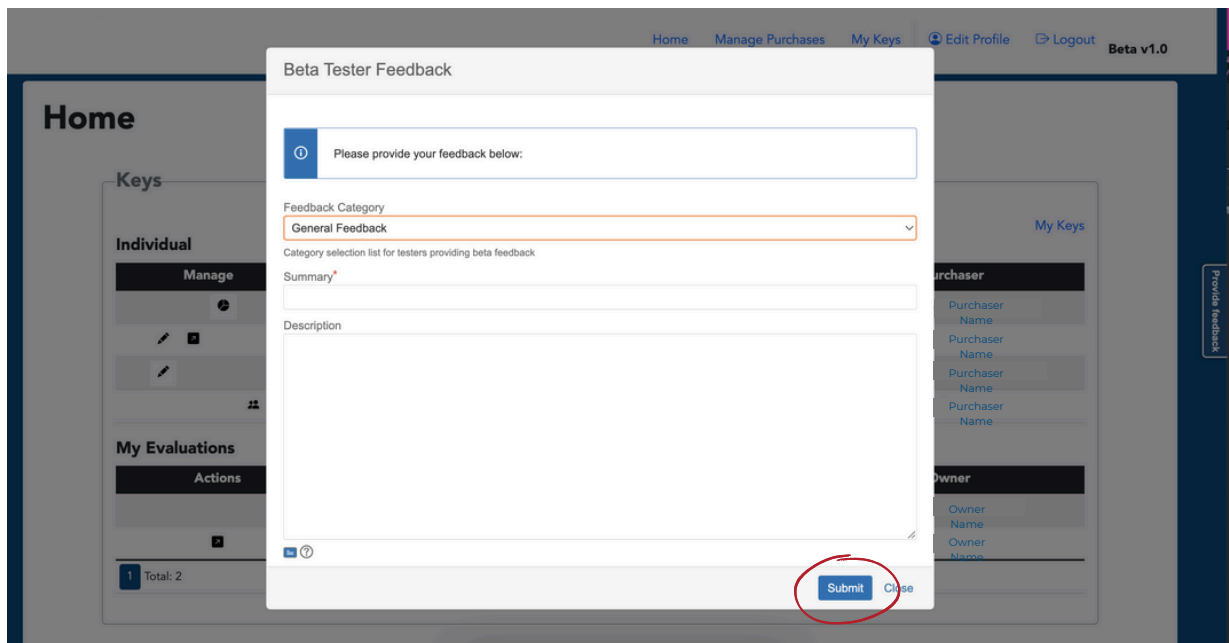
OPTIONAL: PROVIDE SYSTEM FEEDBACK

1



To provide feedback on the Index, click on the right side tab "Provide Feedback."

2



Select the category for your feedback, provide a short summary, include a description of your feedback, and click "Submit."

