

MOVE ASSESSMENT (ONE USER TO ANOTHER)

1. This feature allows you to associate a report to a different user. Example: A completed report has the administrator's name instead of the participant's.

From your account homepage, in the Special Features box, click **Move Assessment (from one User to another)**.

Special Features



- Move a Single Assessment (from one KeyCode to another)
- Move Assessment (from one User to another)
- Move KeyCode (from one Account to another)
- Combine KeyCodes (same Product)
- Combine Users
- Copy Custom Report style to another account

2. Step 1 is to select the "from" user. From the list provided, find the person you want and click **Select**.

Step 1: Select From User

Search Users

Search String

Search

User ID	First Name	Last Name	Email	
667585	Carrie	Greenaway	sample.email@peoplekeys.com	Select
690993	Alexander	Ivanov	email@na.com	Select
781844	Toni	Forcino	roni.forcino@cornerstonemontgomery.org	Select
703268	Steve	Rogers	captain@mcu.com	Select
704067	Scott	Kramer	sgkramer78@gmail.com	Select

3. Step 2 scroll to the bottom until you see User Assessments. Select the assessment by clicking **Select**.

Step 2: User Assessments

Search Assessments

Search String

Search

Assessment ID	Date Used	Name	
1678579	8/11/2023 10:29:45 AM	PeopleKeys 4D Report	Select

4. Step 3 Select the "to" user by clicking **Select**.

Step 3: Select To User

Search Users (Target User)

Search String

Search

User ID	First Name	Last Name	Email	
667585	Carrie	Greenaway	sample.email@peoplekeys.com	Select
690993	Alexander	Ivanov	email@na.com	Select
1365225	Sample	User	sampleuser@yes.com	Select
703268	Steve	Rogers	captain@mcu.com	Select
704067	Scott	Kramer	sgkramer78@gmail.com	Select

5. Review your choices before clicking **Save Changes**.

Move Assessment

Directions:

- Step 1: Select From User
- Step 2: Select User Assessment
- Step 3: Select To User
- Step 4: Review and Save

Step 1: Selected From User: Steve Rogers

Step 2: Select User Assessment: PeopleKeys 4D Report

Step 3: Selected To User: Sample User

Step 4: Save Changes **Save Changes**

5. Return to the home page by clicking **Close**.

Move Assessment

Directions:

- Step 1: Select From User
- Step 2: Select User Assessment
- Step 3: Select To User
- Step 4: Review and Save

Assessment **DISC Personality Report** has been moved from User **Steve Rodgers** to User **Test User**. **Close**

Click to view video: <https://vimeo.com/201305700/78b91366e9>