What you need to know about version 4.0

IMPORTANT! Please print a hard copy of this document to keep as a reference when downloading version 4.0 and using it for the first time.

VERY IMPORTANT! When you're ready to set up projects in version 4.0, you must FIRST enter your Web Hosting account Username and Password. To do that, be sure to follow the steps in item 1 below.

This file contains the following information:

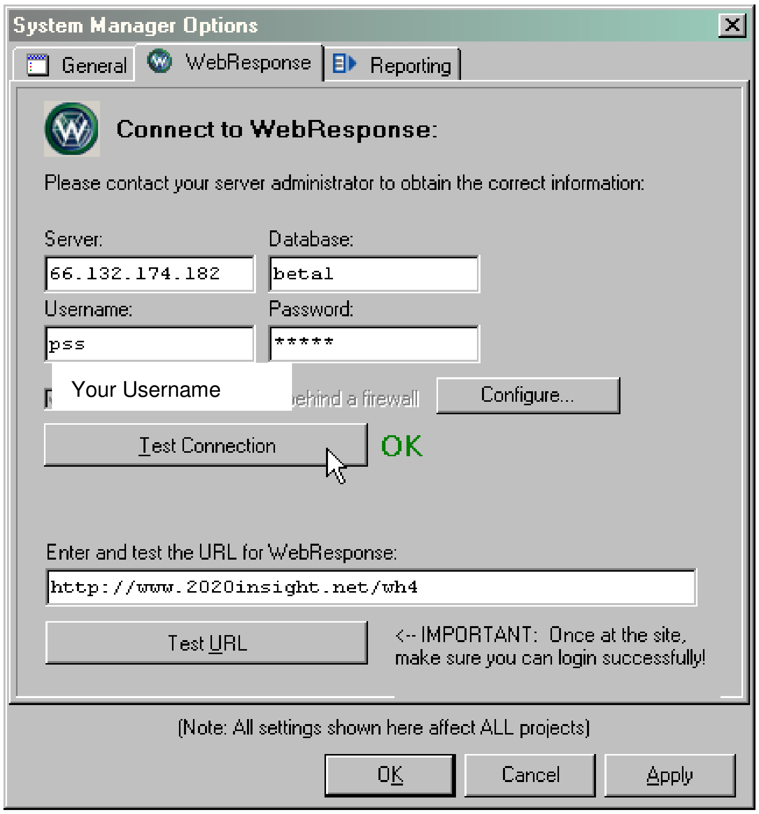
1. Setting up your Web Hosting account
2. Making the transition from version 3.7 to 4.0 (transferring licenses, moving rosters, projects, etc.)
3. What's new in version 4.0
4. Media options available in 4.0

NOTE: When you install version 4.0, a new folder called Insight4 is created. You can safely install 4.0, and it will not interfere with any projects you may be working on in 3.7. ***Do NOT move any active projects from 3.7 into 4.0 until the survey is complete.***

1. Setting up your Web Hosting account

NOTE: If you used **diskette or network assessments** in version 3.7 and have not purchased the Web Hosting service, you will not have a Username and Password. **Diskette and network assessments are NOT available in 4.0.** We recommend that you purchase the Web Hosting service so you can use web assessments. Contact your 20/20 Insight Associate for more information.

After installing 4.0, you'll need to set up your Web Hosting account Username and Password. Follow the steps below to complete this process.

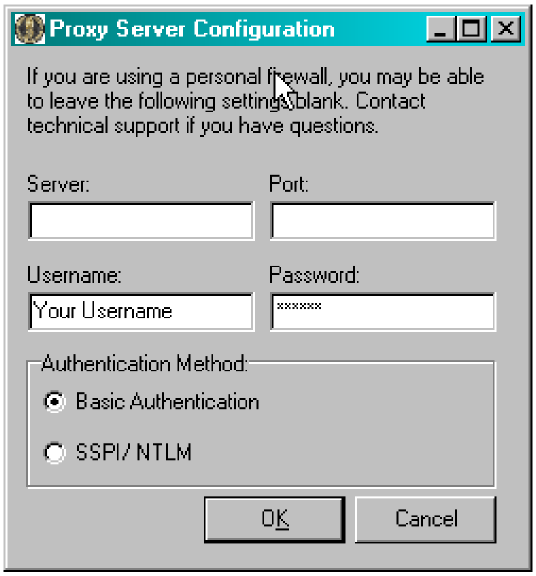


1. From System Manager, choose **View** | **Options** | **WebResponse**.
2. Enter your Username and Password.
3. Click **Test Connection** to ensure the Administration Software connects to the Web Hosting service through the synchronize function. OK will appear next to the button when the connection is verified. (If OK does not appear when you click Test Connection, refer to "**Configuring a Proxy Server**" on the next page.)
4. Click **Test URL** to ensure the Administration Software connects with WebResponse.
5. At the 20/20 Insight Administrator Login, type your Username and Password. The following message will appear on the WebResponse site when the connection is made:

   ✔ Viewing this page confirms that System Manager is successfully connected to WebResponse.
6. After you've completed set-up, click **Apply** and then click **OK**.

Configuring a Proxy Server

If OK does not appear when you click Test Connection, your organization may be using a proxy server. Contact your IT department to determine if a proxy server is being used. If a proxy server is being used, your IT department or computer specialist will need to fill in the proxy server configuration settings.



1. Click **Configure**. The Proxy Server Configuration box appears.
2. Fill in the proxy server information. Note: The Username and Password are assigned to you by your IT department.
3. Click **OK**. The WebResponse tab will appear.
4. Click **Test Connection.** OK will appear next to the button when the connection is verified.
5. After you've completed set-up, click **Apply** and then click **OK**.

If OK still does not appear when you click Test Connection, contact PSS Technical Support.

Toll-free: 800-488-6463, ext. 1
Phone: 757-873-3700, ext. 1
tech@2020insight.net

2. Making the transition from version 3.7 to 4.0

We've made it easy for you to transfer usage licenses and all of your existing files to the new program.

- **Transferring usage licenses from 3.7 to 4.0**

  When you're ready to set up projects exclusively in 4.0, use the ***one-time function*** in the File menu of System Manager called "Import Licenses from 3.7." This ***will permanently transfer ALL remaining licenses*** (both Single Usage Licenses and Unlimited Usage Licenses) from 3.7 to 4.0. ***Do not use this function until you are certain that you no longer need to set up new projects/subjects in 3.7.***

- **Copying projects and other files from 3.7 to 4.0**

  IMPORTANT! If you're currently administering a project in 3.7, do NOT copy the project to 4.0 until it is completed. The two programs send respondents to different URLs so you should only transfer a project to 4.0 AFTER all the data has been collected.

  When you want to use files from 3.7 in 4.0, here are the steps for copying them into 4.0:

  1. Open System Manager **3.7** and click on the folder containing the files you want to copy.
  2. Click on any file on the right, then select ALL by pressing **CTRL+A**.
  3. Copy your selections by pressing **CTRL+C**.
  4. Open System Manager **4.0** and click on the related folder.
  5. Paste the files by pressing **CTRL+V**.

  NOTE: When you open a 3.7 file in 4.0 for the first time, you'll be asked if you want to convert it to 4.0. Click **OK**.

3. What's new in version 4.0

Version 4.0 is the most significant upgrade in the history of 20/20 Insight GOLD. Here are some of the major new features and functions:

Survey set-up:

- A new drag-and-drop interface makes survey construction a lot easier – e.g., when you re-sequence items and assign respondents to subjects
- A much easier way to assign licenses and track license usage
- Complimentary Test Subject in Test Subject Roster, activated with an Unlimited Usage License and pre-assigned to rate Self. Import Test Subject into every project you create to easily check your set-up before notifying respondents and subjects. (Username: Test Subject and Password: test)
- Construct an item of any length (no more maximum of 255 characters)
- Option to use different scale names and descriptors for each category. (Scale range such as 1-10 must remain the same across categories.)
- Insert text-only questions anywhere in the survey – e.g., respondents can reply to a summary question at the end of each category
- Include or exclude structured comment input from one item to the next

Survey Library:

- Developmental Recommendations for all Executive Leadership items—all three leadership surveys now have developmental recommendations
- Updated Recommended Resources for all three leadership surveys: Executive Leadership, Team Leadership and Personal Leadership
- New survey in the Team and Organization Survey Areas folder: "Organizational Support for Performance Improvement" survey – to find out how well your organization's policies and practices are aligned with the goals of your performance improvement programs
- New: Vital Learning Leadership Skills folder – three surveys based on the highly acclaimed Vital Learning Supervision Series. If you use these outstanding leadership development materials, you now have ready-made pre- and post-training assessments associated with each learning unit.

Reporting:

- Insert custom documents anywhere in the report
- Include "how to read this report" for each report section
- A new calculation: "Overall" score (average of ALL items)
- Break-out of comments by type of rater relationship
- Automatic creation of PDF reports – no Acrobat needed!
- Automatic email of PDF reports to all subjects

Web assessments:

- The backend database on the web is now powered by SQL-Server—it's faster and more robust than MS Access
- The new Synchronize button lets you perform the following tasks *with one click*:
    - Upload and download survey data
    - Instantly synchronize with the web any changes you make in a project
    - Update subject or respondent progress information in the Administration Software
- Subjects can select their own respondents, with flexible administrator control
- If participants forget their password, a reminder link sends them an email without involving the administrator
- Respondents can view an entire category of items per page
- In set-up, customize or exclude "N/A" and other survey text
- Save email messages to participants for different purposes
- Option to send respondents to a specific web page (of the administrator's choice) at the end of assessment

Other changes

- **Summary questions.** Since you can now create either scaled or open-ended items in the same step, we no longer have a separate step for summary questions. You can easily place open-ended questions anywhere in your survey.
- **IDP.** The data files in 4.0 are not compatible with the IDP's structure, so the IDP is no longer included in the Administration Software. We'll make it available free on our website, in case you'd like employees to use it for the goal-setting and journal sections.

4. Media options available in 4.0

With the new program, you have two ways to distribute questionnaires to participants:

- **Web**
- **Paper**

Most 20/20 Insight customers create web-based assessments, and a small number still need paper surveys for those who don't have access to a computer.

Because new computers no longer have floppy disk drives, that option has been eliminated.