

# E-Guide to Thomas Online

## Issue Five



Welcome to issue five of the E-Guide to Thomas Online. To help you get to grips with our new website, each month this 60-second guide will spotlight one site feature, explain what it does, how to use it and what's so good about it!

### So what's new..?

#### 'Admin Utilities'

This area allows you to review and make changes to your account information. You can edit contact information, change your password, review purchases made and review the price structure for reports. This section is where you can manage your sub administrators, give them units and request units for your own account. The Manage your Bespoke reports function is also accessed from this section.

#### How does it work?

Each menu item allows you to manage a different aspect of your account:

**View current profile:** Amend your contact details and set advanced options such as language preferences, name sorting preferences and receipt of invitation notifications.

**Request units and unit request history:** Order more web units from Thomas, view unit requests from sub administrators or view completed orders.

**Purchase history and price chart:** View all report purchases, search for specific purchases, create a summary usage report or check prices for different assessments and reports.

**Report options:** Amend the way your reports are displayed by choosing from PDF or HTML formats, standard or greyscale graphs and selecting font type, size and colour.

**Manage bespoke reports:** Create new bespoke reports or make amends to existing bespoke reports.

**Upload data file:** Send PPA invitations to multiple candidates by uploading a .CSV file with their details (a CSV file can be created using Excel). Once uploaded the candidates will automatically receive invitations to complete a PPA and their details will be added to your account.

#### How will it help me?

With all the utilities functions in one place monitoring and controlling your account activity is faster and easier than before. Simplified processes for managing sub administrators and unit allocations reduce unnecessary clicks and make account administration straightforward.

*For more advice and tips on how to get the most from our new website contact your consultant.*