C-me Admin User Guide

Revised July 2024 for v2 platform

Contents

(Click to jump to the section)

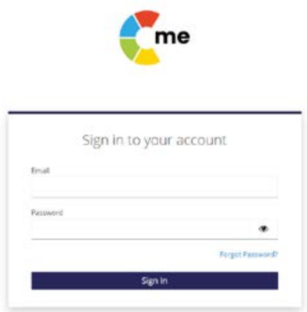
Overview

Our C-me platform is designed to enable you to engage with your C-me profile live, personalising it further, making it your own. Our platform enables you to share your report with others whilst also giving you access to the profiles of members of your team and organisation, where permission is granted.

For full functionality it is best to access the C-me platform on a desktop setup although most functions will be available on mobile devices.

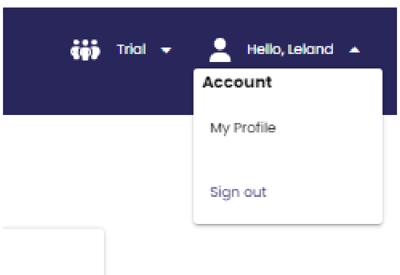
Logging In

Your admin access will be set up as part of the onboarding process and can be accessed **here**.



Signing in to your account here will mean that you can go between the C-me Admin and the platform without having to sign in again.

You can do this by clicking **Hello (Firstname)** top right in the navigation bar. The drop down will reveal **My profile**.



Clicking on this will take you into your profile on the platform.

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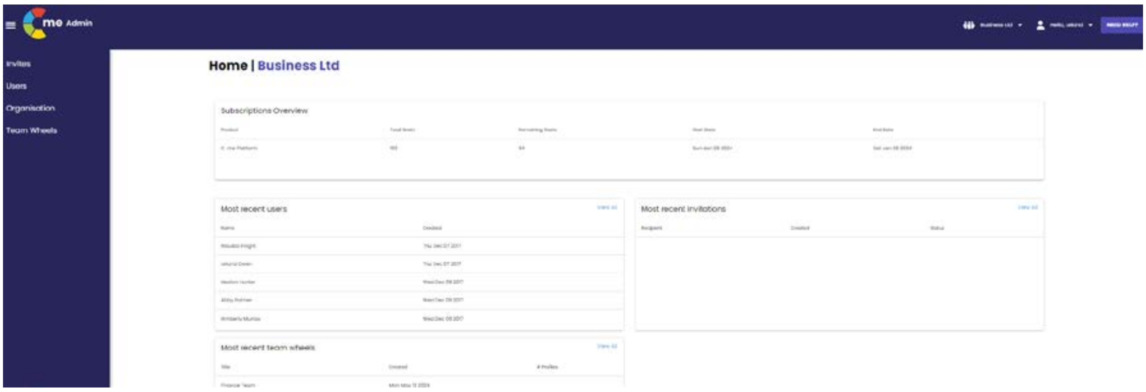
Homepage

On first logging in you will be taken to the Home page



At the top of this page, you will find your **Subscription overview**, detailing the number of seats purchased, number of seats remaining, and the start and end dates for your subscription.

Underneath this you'll find quick reference tables for:

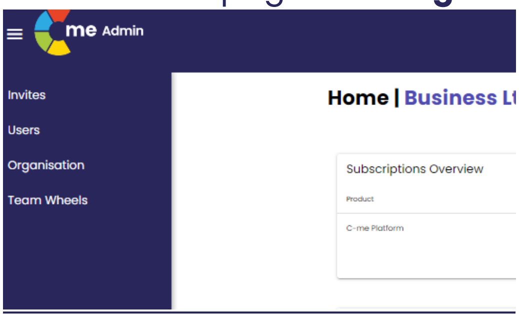
- Most recent users
- Most recent team wheels
- Most recent invitations

With an option to **view all** in each top right corner.

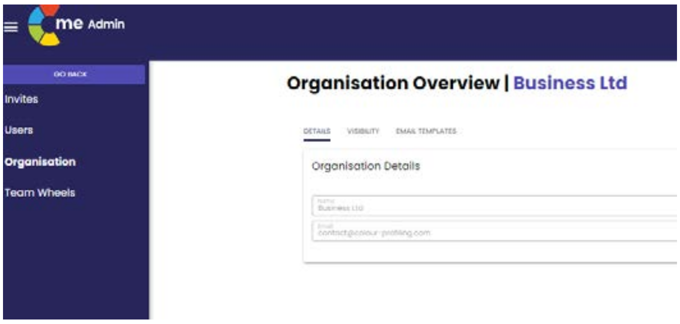
Permissions for C-me Platform Usage (Organisation)

Firstly, you will need to set permissions for platform users. The CE Team will go through setting permissions with you during onboarding.

On the home page click **Organisation** in the left-hand menu.



This will open the **Organisation Overview** page. This opens the **Organisation details** view with tabs above for other sections: Visibility and Email templates.

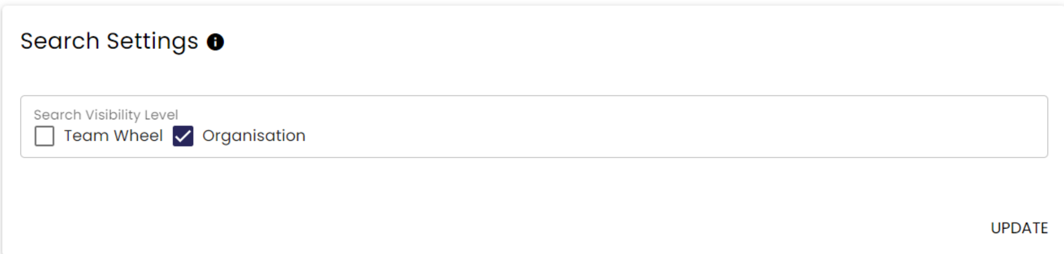


Visibility

Clicking the Visibility tab will take you to this page where you will find **Search Settings and Section Sharing Preferences**.

Search Settings

This sets the user visibility level, (there is a useful reminder in the information pop up if unsure).



This can either be set to **Team Wheel** or **Organisation** or both. If only one is set, all users will have that level of access by default. If both boxes are ticked the individual will then have the ability to choose which they would prefer in their own settings.

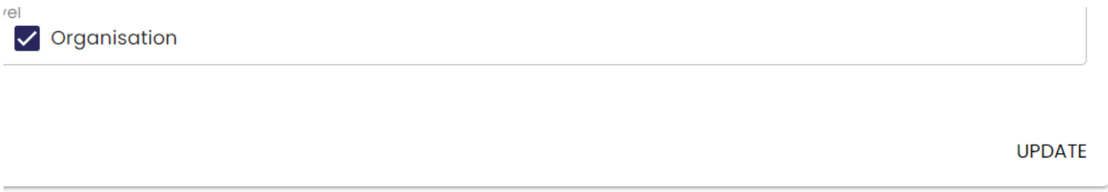
Note: Currently where both options are chosen this will default to Team wheel setting until the individual user has chosen their preferred option.

Team wheel level means that individuals can see each other's reports if they share a team wheel. **Organisation** level means that individuals can see others' reports across the organisation, for those that are signed up to the C-me platform.

These users will either show in the table under **My Organisation** in the platform or you can search by name.

Note: the team wheel will show the profile the individual has chosen as their default. If they haven't chosen their default, you won't see their top two colours and the first report completed will automatically be set as their default.

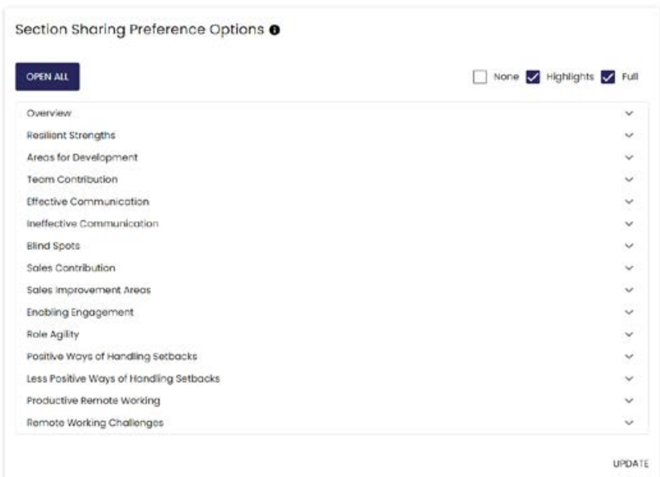
Once set, click **Update** in the bottom right corner to save changes.



Section Sharing Preference Options

Scrolling further down the page you will find **Section Sharing Preference Options**.

Here you can define the choices an individual user has when editing their preference sharing options for each section of their profile in their user settings (the individual user will always see their whole report and any personalisation (highlights), these choices determine what is shared with others).



You can set preferences for all sections at the top on the right or if you prefer you can individually go into specific sections customising the preferences for a particular section.

The options for sharing are:

- **None** – the section this applies to will not be shared at all and will therefore not be included as a selectable option when the user's profile is viewed (depending on permissions other sections might be visible or potentially solely their graphs and wheels – the default minimum)
- **Highlights** – The section will only show highlighted statements, if the user has highlighted them. If there are no highlighted statements, there will be a placeholder message notifying them as such.
- **Full** – the full unedited section will be shared.

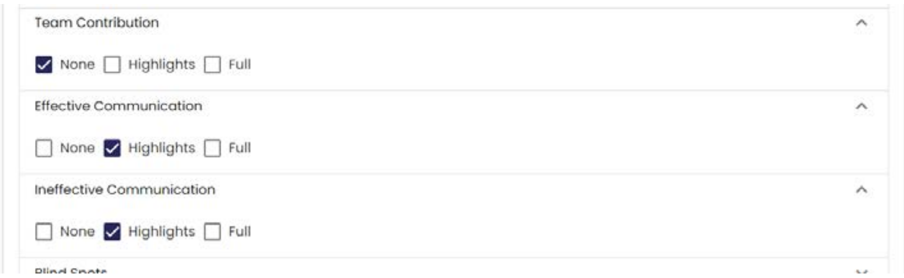
NOTE: The above descriptions apply to individual sections. If you choose to use the shorthand tool at the top right to set permissions for all sections, then please refer to the additional descriptions below:

- **None** – No profile statements will be visible in any section. However, their graphs and wheel will still be visible.
- **Highlights** – All sections will be visible, but viewing a section will only show the highlighted statements, if there are any.
- **Full** – the entire profile is visible as if the user themselves are viewing it.

Where the organisation has ticked more than one box i.e. none, highlights and full. This then gives the individual user the option to choose which they would prefer. They can do this in their individual user settings, in the profile platform.

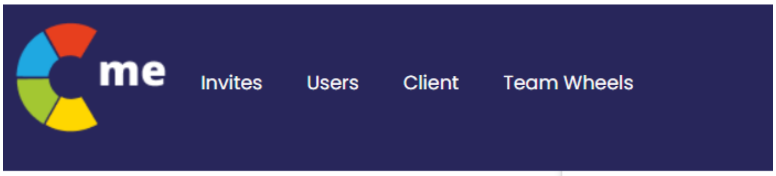
NOTE: If more than one box has been ticked the preference will default to Highlights, unless Highlights haven't been ticked, in which case it will default to None, until the individual user has chosen their preferred option.

The **section sharing options** allow you to choose which sections you would like to set as shared for the organisation, where you may not want all sections shared standardly. For example, some organisations may choose to only share their effective and ineffective communications sections. This can be done here by choosing **None** overall but individually click the dropdown for chosen sections and ticking **Highlights** or **Full**, as required.

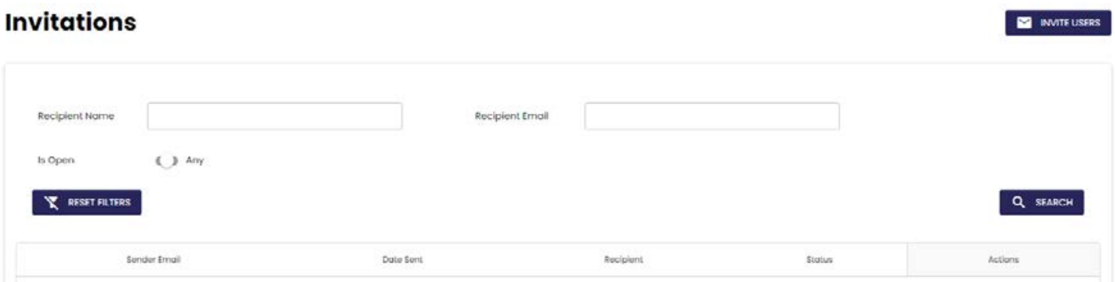


Inviting Platform Users (Invites)

This can be done through the **Invites** tab in the navigation bar.



Click on **Invites** which will open the **Invitations** page.



You will then be able to view all the invitations you have sent along with the current status of those invitations.

Status	Meaning
CLOSED	A user has used this invitation to sign up. This invite cannot be used to sign up again.
OPEN	Invitation has been sent and not yet used and is still in date. This invite can be used to sign up one user.

REPLACED	A more recent invitation has been sent to the same email address. This invite cannot be used to sign up.
EXPIRED	There is a 14-day expiry on sent invitations at which point if the person hasn't completed you will need to resend.
INVALID	The invitation has been cancelled or revoked and cannot be used to sign up.

On the far right there is an **Actions** column with the opportunity to resend invitations where required and cancel invitations where the invitation hasn't been used and you want to revoke it.

Here, you can also search by recipient name or email by clicking the **Search** button above the invitations table.

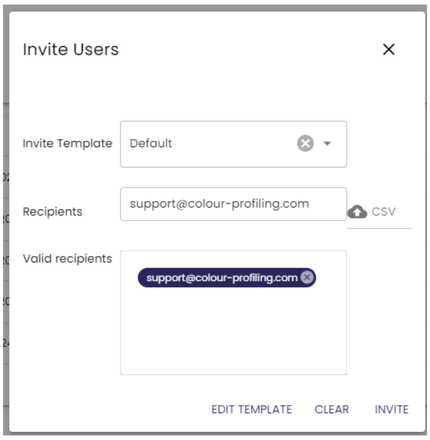
Sending Invitations

Top right of the Invitations table you'll find the **Invite Users** button. Clicking this will open an **Invite Users** pop up.

Clicking in the **Invite Template** field gives a **Default** option. Click **default**.

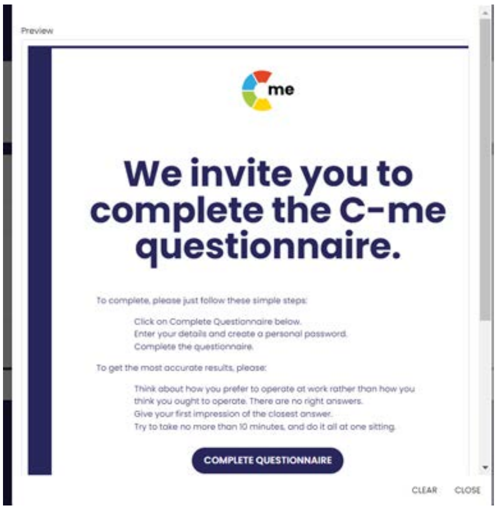
Click **Recipients** field to add in users to receive invitations. Depending on the numbers of recipients you can type or paste in the individual email addresses separated by a comma, or for larger numbers of recipients there is also the option to upload a csv file.

As you type in the recipients details the system will validate the email addresses and populate them below in **Valid recipients** box, if you have made a mistake and want to remove any recipients, you can do so in this box by clicking the x icon at the end of each address.



When you have added everyone, click **Invite** in the bottom right corner of the **Invite Users** box.

If you want to view the invitation before you send you can click on **Edit template** which will show you what will go out to recipients. As this is the default template it won't be customisable.



There will be a confirmation pop to tell you that invitations have been sent.

Note: Standardly, invitations are exclusive to the person they have been sent to so are no longer interchangeable.

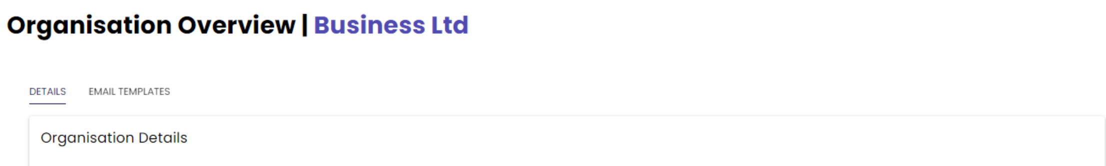
As previously mentioned, there is also now a 14-day expiry on sent invitations at which point if the person hasn't completed you will need to resend.

As the invitations are now unique, you may need to flag to individual users that where an invitation has been resent, they will need to ensure they are using the latest invitation (rather than searching their inbox and using an older expired version).

Customising Invitations

You can create customised invitations by Clicking on **Organisation** in the left-hand menu.

This will open the **Organisation overview** page. Once here click on the **Email templates** tab.

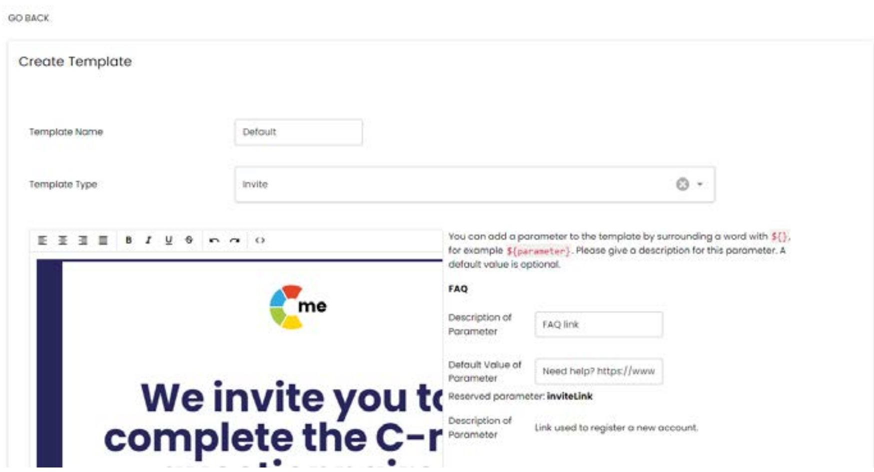


This will open the **Email Template** pop up.

Click **Create** on the right-hand side.

Give the Template a name. We would suggest your organisation followed by potentially – tailored invitation, for example.

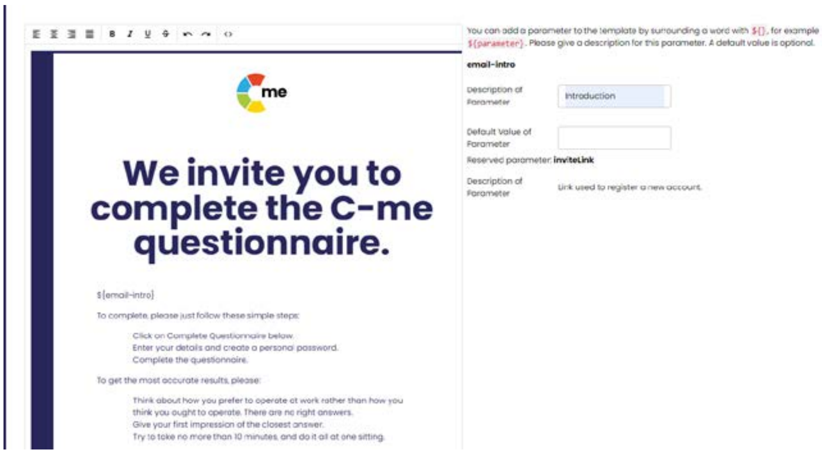
Invite will appear as default in **Template Type** to reveal '**Invite**' and click on this.



Below it you will see the template invitation with instructions top right.

We suggest you start with an intro in the template…

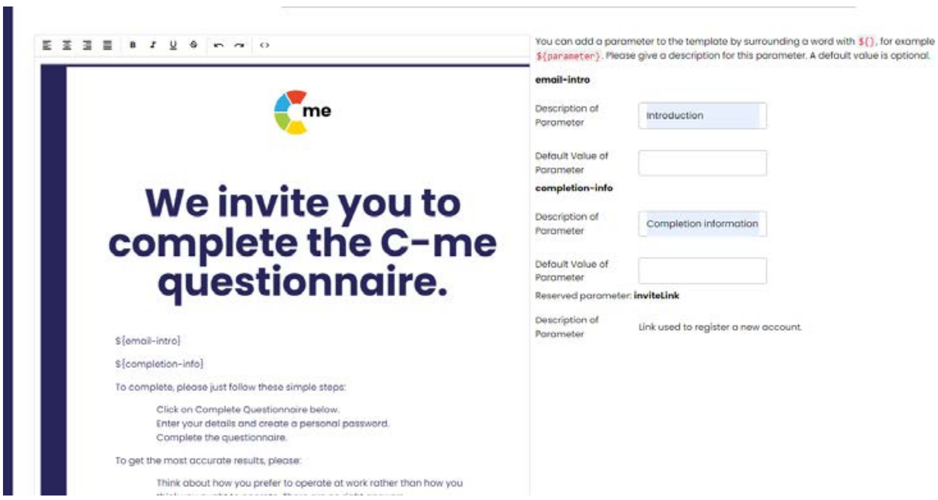
Click above the first sentence and type in the following… **${email-intro}**



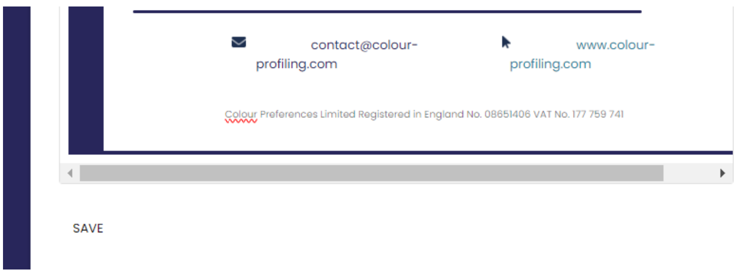
Add the description of parameter on the right, 'Introduction' and you can leave the default value blank, filling this in when you complete.

Next, we suggest adding completion info. When you click in the template where you want this to appear and begin typing the instruction **${completion-info}** this will then populate the parameters on the right-hand side.

Again, include the description, completion information, and leave the value blank.



Once completed click **save** on the bottom left



Using the Customised Invitation

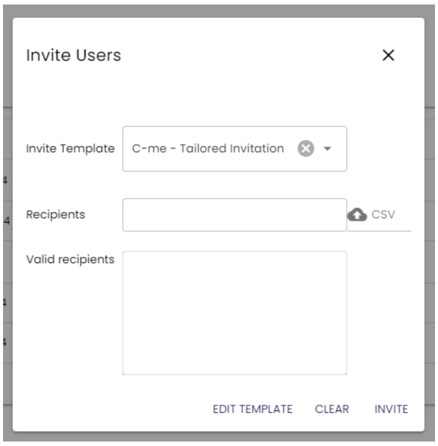
Now when you go to the invites tab you will have a dropdown with two options the default and your tailored invitation.

If you choose the tailored option, you will always have to ensure you complete the added information, the system doesn't allow you to leave this blank so if you prefer not to include these added fields, we suggest using the default invitation, reserving the tailored invitation for when you want to add in further information.

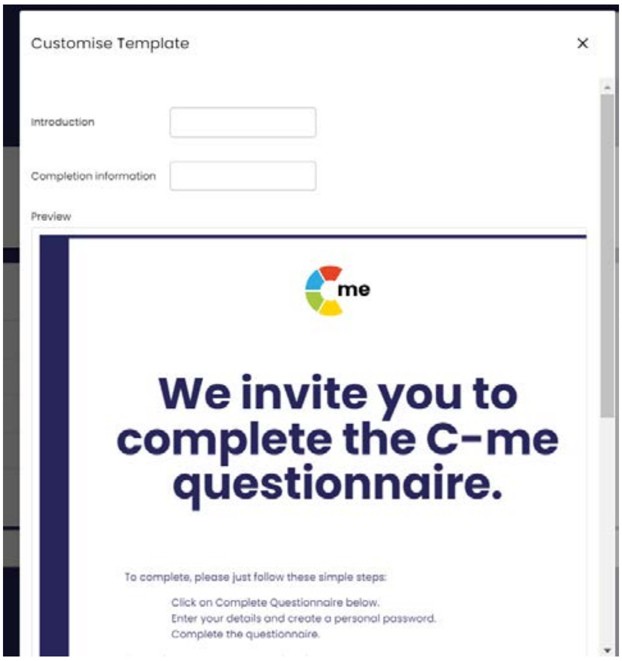
To add in the further information, click invites top left.

Click on **Actions** then click **Invite users**.

In the **Invite users** pop out click in the **Invitation template** field. Choose your tailored invitation option by clicking it.



Then click **Edit template** at the bottom. This will open out a **Customise template** preview with your customised field options at the top.



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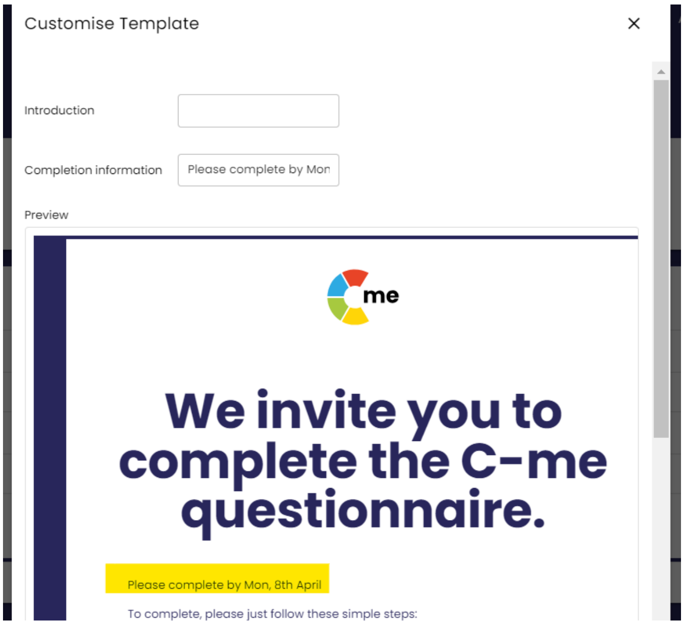
As you start to type in each field, it will populate the text where you have chosen for it to be inserted in the preview.



PDF Profiles

While these are not available standardly to the end user, on completion of the questionnaire, where required, the user profile will be emailed to the designated organisation email address in pdf format.

Workshop Manager

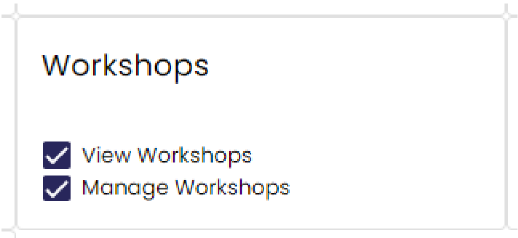
In circumstances where you may want to time release C-me profile access on the platform, where you may be facilitating a workshop for example, and would prefer delegates not to receive their profile until the workshop takes place, you can use the **Workshop Manager** functionality.

Note: The time release option is only relevant for those who haven't previously completed the questionnaire.

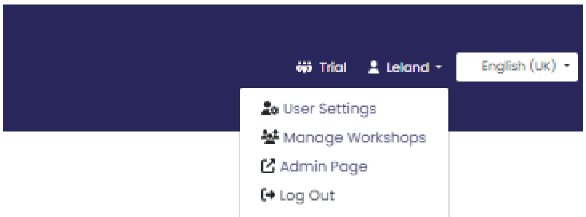
During the onboarding process, the CE team will establish whether this is something that you require and if so, will add it to your Permissible roles. If you decide you want to add this later, contact the CE team to activate. This would only be accessible to those with C-me Admin roles not to Users generally.

If unsure, you can check if you have access to this by clicking **Organisation** on the left-hand menu and then clicking the **Roles tab** in the **Organisation Overview** at the top of the table.

This will open the **Organisation Roles** page. Once here you can view your **Permissible roles** for the Organisation.



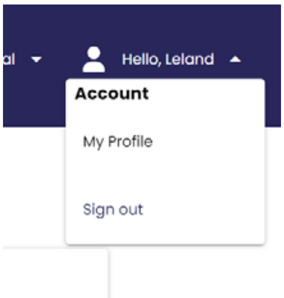
You can also check your user settings on the **C-me Profile Platform** by clicking on your name on the far-right hand side of the navigation bar. If you have **Admin Page** and **Manage Workshops** access it will appear in the dropdown here.



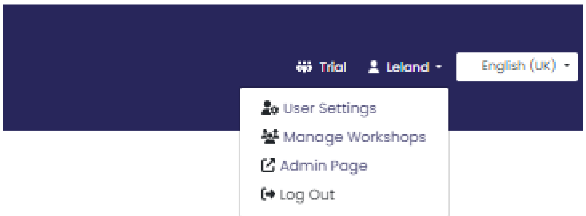
Setting up Workshop Management

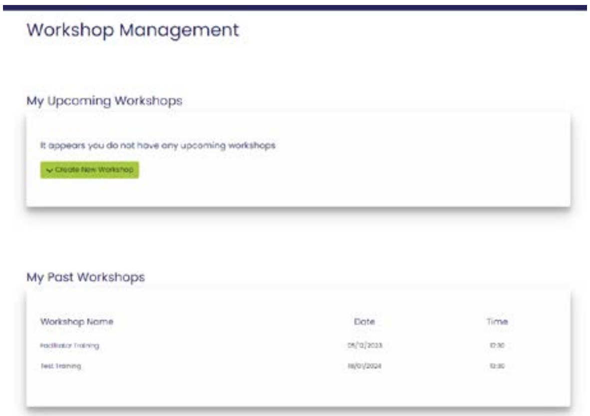
Note: This is currently accessed through the C-me platform and not C-me Admin. Although will be moving to C-me Admin in the future.

Access C-me platform here. If you are already signed in to C-me Admin you will not need to sign in again and can click through to your platform profile by selecting **My Profile** on the far right of the navigation bar, under your name.



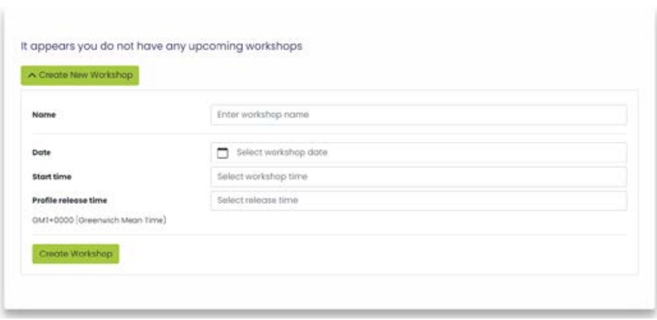
Once in the Platform, clicking on Manage Workshops will take you to the Workshop Management page





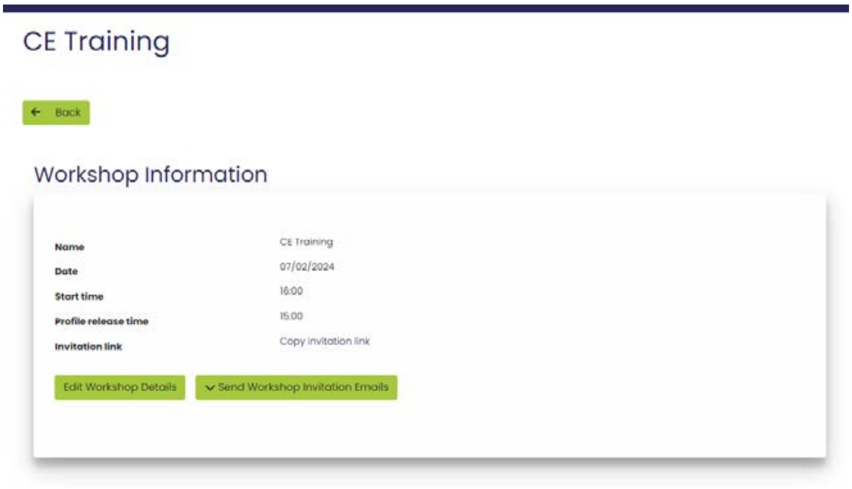
To set up a new workshop click **Create New Workshop**.

This will reveal the following dropdown.



Go through and fill in each field with your workshop details.

Click **Create Workshop** to complete.

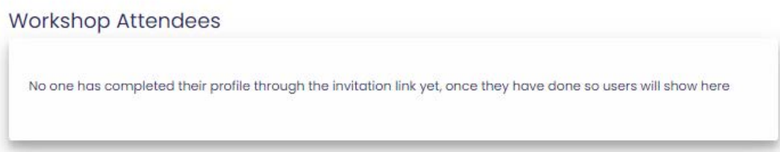


The **Workshop information** box will then appear confirming the details of your upcoming workshop.

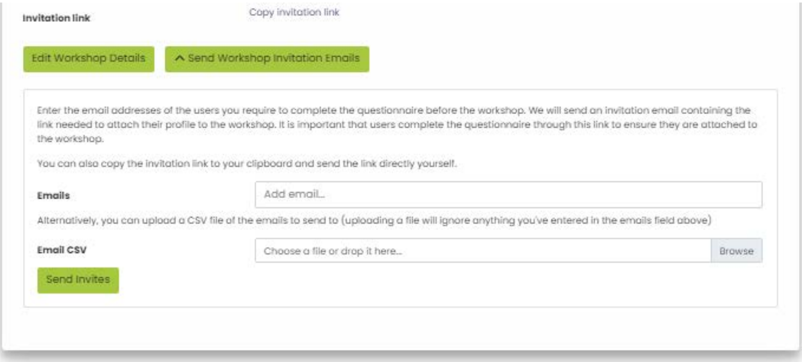
You then have options to:

- **Edit the workshop details** if incorrect or need adjusting.
- **Send workshop invitation emails** to complete the questionnaire.
- If you prefer to send an email separately with other joining instructions, you can also **Copy invitation link** here to embed it in a separate email or other workshop information being sent separately.

Below this is the **Workshop Attendees** box which will be populated as people invited through the Workshop Manager complete the questionnaire.



Clicking **Send Workshop Invitation Emails** opens the following (you won't need to do this if you've chosen to copy the invitation link to embed in a separate email or other workshop information):



You are then given the option to add emails individually or to upload a list of emails in a csv file.

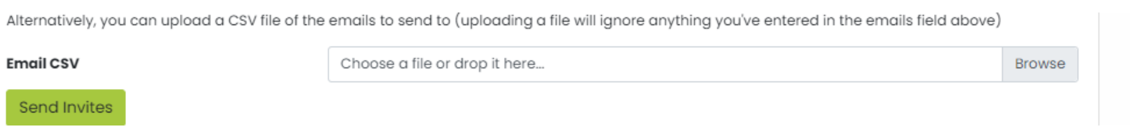
As you type the email address you may see a red text prompt underneath saying invalid email address, this will appear until you have completed that email address at which point clicking the space bar (or separating with a comma) will add that email and you can begin typing the next.

Each time an email is added it will appear with an x at the end so that it can be removed if a mistake has been made.

Copying and pasting a list of email addresses when followed by a space bar will also include each email in that list.

The only way of removing email addresses at this point is to click the x at the end of each email address.

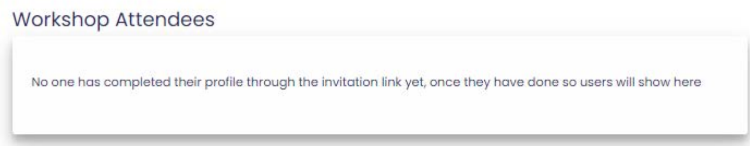
To add a csv file, you can drop the file needed in to the **Email csv** field or **Browse** a directory to include.



Once you have included the email addresses required, click **Send Invites** to complete. A confirmation message will appear.

If you prefer to send the link in a personal invitation, manually, you can click **Copy invitation link** next to **Invitation Link** on the **Workshop Information** screen.

Once the **Workshop Attendee** has completed the questionnaire through the invitation sent, they will appear in a list of attendees underneath the Workshop Information box.

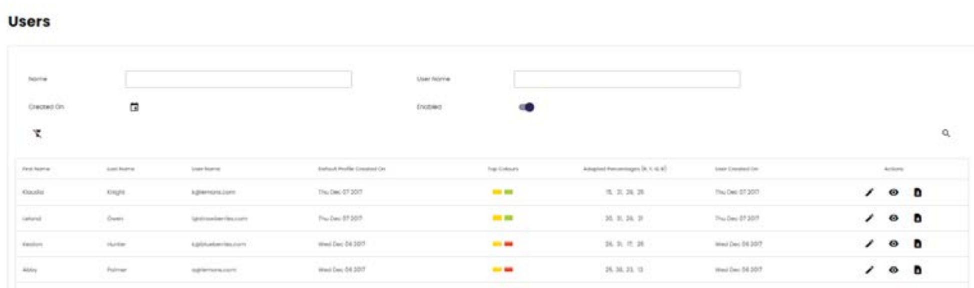


Their profile will then become available to them through the C-me platform at the specified time and date.

You also have the option here to click to allow early access or to delete them from this Workshop by click on the X button.

Users

Clicking on **Users** in the left-hand menu opens the Users page.

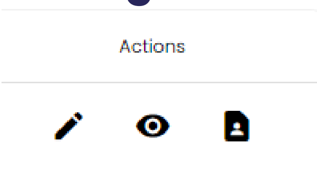


Here you can see **Users** that have registered on the platform and their status including headline profile information and actions available.

Where they have completed the questionnaire you will see information on their profile, default creation date, top two colours and adapted wheel position percentages.

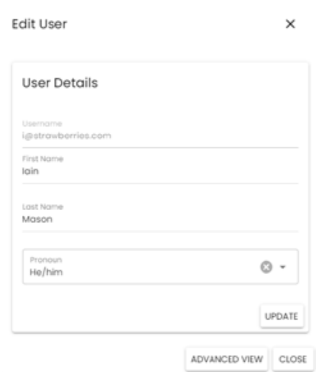
Where they have registered but not yet completed, the profile fields will be blank.

Editing Users



The **Actions** column gives admin users the ability to edit, depending on permissions granted, using:

- the pencil icon to give a quick edit function.

  Allowing you to make quick changes to user's **name** and **pronoun**, where there has been a typo potentially or a mistake. There is also an option to click on **Advanced View** from here.

  Clicking **update** once changes are made will save them.

- the eye icon takes you straight to **advanced view**, opening in the **User Details Summary**

The **User Details Summary** in **Advanced View** gives you the same information available in the quick edit as well as showing you the top two colours and making other sections available on the profiles they have completed (**Profiles** section) and the **Team Wheels** they are a part of (**Team Wheels** section).

User Profiles

Scrolling on the **Profile** section will list their available profiles. You have the option here to view their default profile in the C-me platform.

User Profiles

Created At	Top Colours	Wheel Position	Adapted Percentages (R, Y, G, B)	Natural Percentages (R, Y, G, B)	Actions
Thu Dec 07 2017		8	15, 31, 29, 25	11, 24, 53, 11	

Team Wheels

The Team Wheels section will give you a list of all the team wheels they are a part of. The pencil icon on the far right in the **Actions** column will take you to this team wheel and give you the option to edit it.

Team Wheels

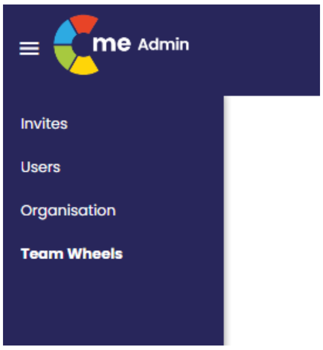
Title	# Profiles	Last Updated On	Actions
Organisation Wheel	5	2024-05-13 13:02:44	

- the profile icon allows you to see the user's default report as they would see it in the C-me platform.

Team Wheels

The Team Wheel functionality allows you to add multiple people who have previously completed the C-me questionnaire on to a single wheel showing the behavioural preference make-up for that team. Both the adapted and the natural team wheels can now be calculated. Once all the selected users have been added to the wheel, this can then be processed as a report. You will also have the option to add the natural team wheel to the processed report.

Click **Team Wheels** in the lefthand menu.



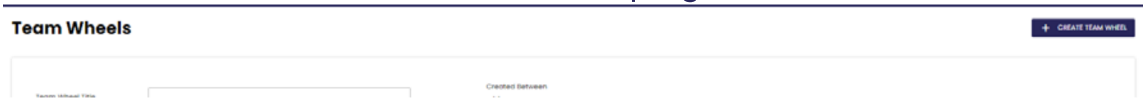
This opens the **Team Wheels** page.

Here you'll find a list of team wheels that have been created by title with an option to search by title or creation date.

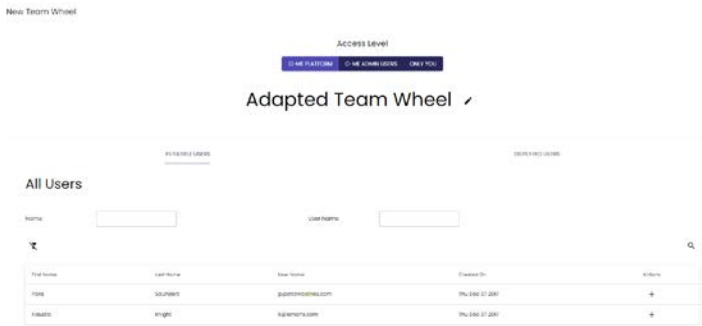
The table also shows the number of people in each wheel, the last time it was updated, and the **Actions** column gives you the option to edit by clicking the pencil icon.

Creating a New Team Wheel

Click the **Create Team Wheel button** top right of the table.



This will open the **new team wheel** page.

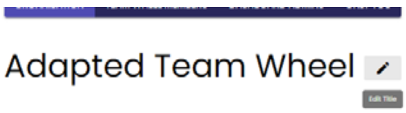


The **Access level** determines who will be able to see this team wheel.
C-me Platform applies to permissions set for sharing with other users in the platform.
C-me Admin Users will give all C-me Admins access to the team wheels.
Only you will mean that only the person creating the team wheel will have access.
Click the **Access level** you want to set.

Title

NOTE: Standardly the wheel created will be the **Adapted wheel** i.e. from the adapted graphs of all the users included. The **Natural wheel** for these same users will be visible once created.

The standard title will appear as **Adapted Team Wheel**. Click on the pencil icon next to this to create your own title.

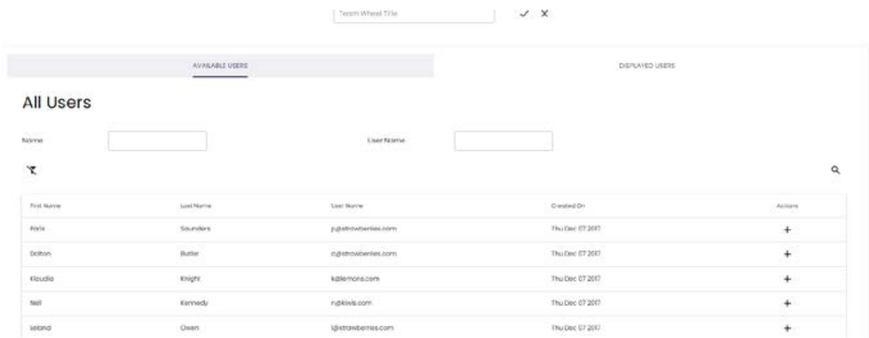


Add the new title into the field and click the tick icon.

Your new title will now appear.

Adding users

Scrolling down you will see a table labelled **All Users**.



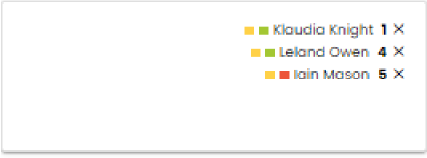
These are users who have completed the questionnaire and are available to add to your team wheel.

You can scroll down and add by using the **+** sign in the **Actions** column.
On adding the first user the wheel will appear above the table, each user added will place a small disc representing their behavioural preference or wheel position on the wheel.

Their name will also appear in a box alongside each colour quadrant.

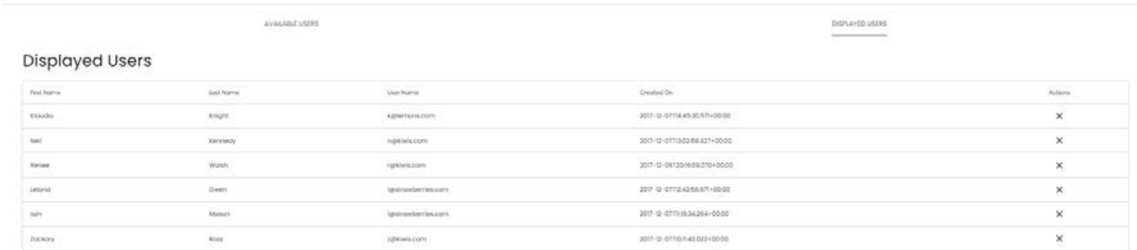
Removing user

To remove users, you can either click the **X** next to their name around the wheel (like below),



Or scrolling down to the table you can click the **X** next to the names (once added the + becomes an x).

NOTE: The table of users is automatically ordered by **available users,** but you can click on displayed users to filter only the users that have been added to the wheel, which might make it easier when removing.



You can also filter by **name** and **username** to search.

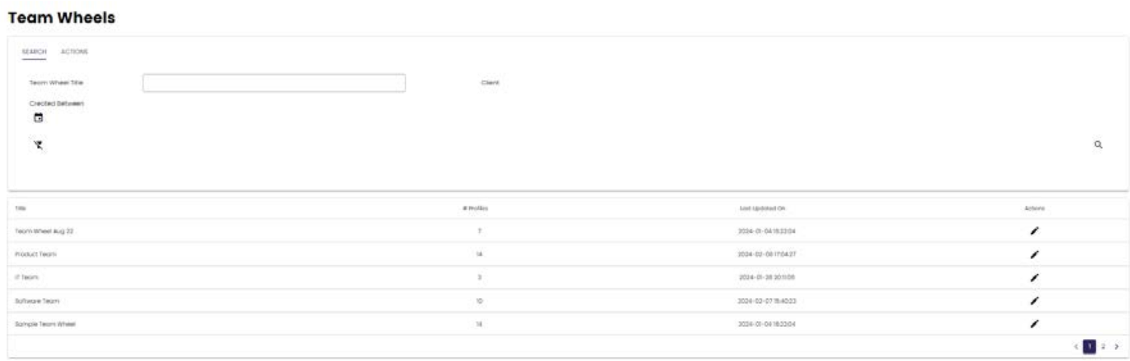
Once finished click **Create team wheel** button in bottom right corner.

Note: Once you have clicked **Create team wheel**, the wheel will close, assuming you have finished, if you need to make further edits, you will need to access it through the list of **Team wheels** in the **Team wheel** tab (go to **Editing team wheels**).

Editing team wheels

In the **Team wheels** page, you'll see a table of created team wheels.

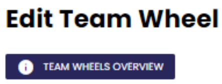
These can be filtered above the table by **title**.



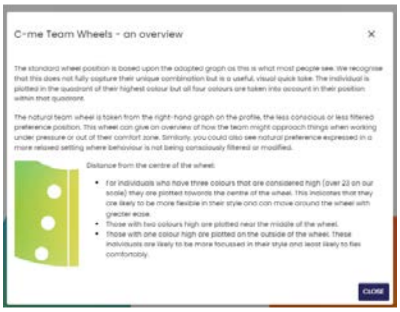
To edit go to the **Actions** column and click on the pencil icon.

This will open the **Edit team wheel** page.

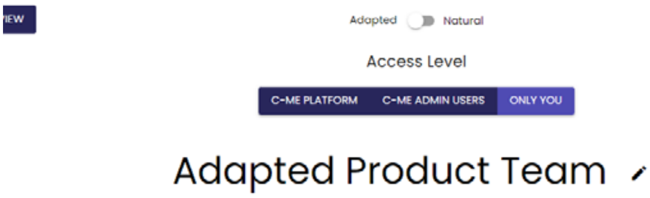
In the top left corner, you will find the **Team wheels overview** button.



Clicking this will open a pop up giving you useful information on the wheel and how it was created.



In the top half of this page, you will find the **Adapted wheel** with a toggle option to toggle between the Adapted and Natural wheels. The wheel title will let you know which one you are viewing by displaying Adapted or Natural in front of the title.

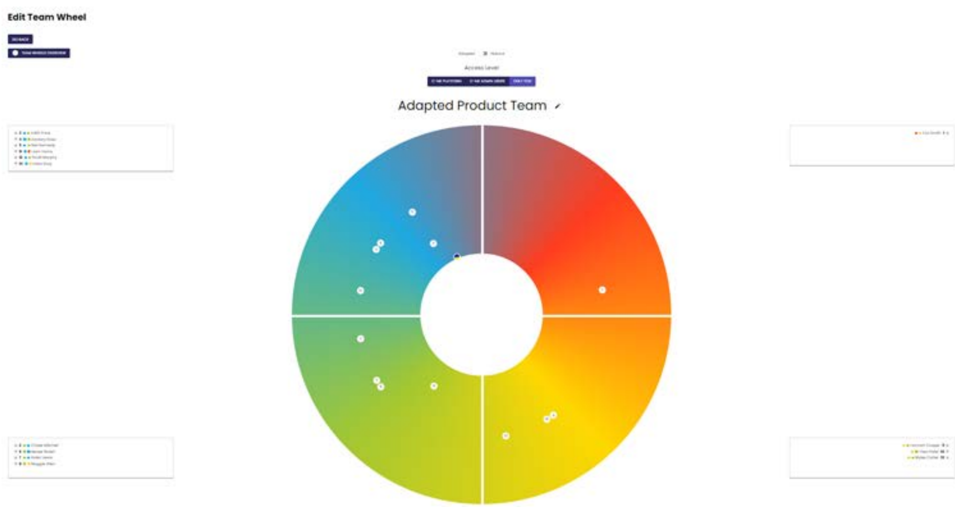


You also have an option again to edit the title here, using the pencil icon.

Above the title you will see the permissions that have been set for visibility of this wheel. Again, these can be changed here.

Users are plotted around the wheel in various positions depending on their behavioural preferences.

In each of the 4 quadrants there will be a box with the list of users plotted in that quadrant as well as their top two colours. You will see a x alongside each of their names, allowing you to remove them from the wheel.



Scrolling down you will see again the table with the list of users.

You can add more users by clicking the **+** sign or you can remove users here by clicking **x**

The display will default to available users, but you can filter to displayed users which will only show those on the team wheel.

Note: the team wheel will automatically save any changes made as you make them.

Charts

Clicking charts will give you access to the additional graphs associated with this wheel which can provide further valuable insight into team dynamics.

The first visual displays the teams colour balance which is the average score for each colour across all the profiles. The Core Preference Vs Potential Flex visual shows the core preference (in the inner circle) which is the accumulation of all team members' top colours. The outer circle adds together all strong or resilient colours (scoring above 23) and therefore shows the potential for the team to flex into those colours.

Finally, the wheel balance graph, as mentioned in previous notes, can be useful when the number of users you want to display on a team wheel exceed the optimum number of users to fit comfortably around the wheel.

Go back

Once finished editing etc you can simply click the **Go back** button

or click Team Wheels on the left-hand menu, to go back to the Team wheels page.

Note: You may experience display issues with wheels containing over 40 users. This will be largely dependent on density of colour preference as to maximum numbers of users displayed on a wheel. You can keep adding users beyond this, but they may no longer display clearly. The Wheel Balance graph can be a useful alternative visual for cases where the wheel doesn't comfortably hold the number of users you are wanting to display. See accompanying wheel visuals.