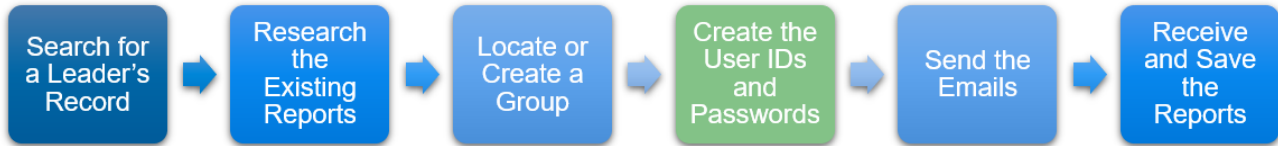


HALO Development: Create the User IDs and Passwords

The following process is used to work in HALO Development and generate assessments and reports from a recruiter request or a P&CD event (e.g., LDI). This job aid focuses on the fourth step in the process.



To enable candidates and leaders to take the assessments, user IDs and passwords are required. After locating or creating a group, use HALO to create a CSV file in Excel that contains user IDs and passwords. These user IDs and passwords are later emailed to candidates or leaders.

Use this job aid to:

- [Create the User IDs and Passwords](#)
- [Relate the IDs and Passwords to the Leader Information](#)

Create the User IDs and Passwords

First, use HALO to generate a CSV file containing user IDs and passwords.

Steps	Screen Shot
1. Click the Add Participants icon.	<p>The screenshot shows a sidebar menu with the following items: Group Details, Group Information, Assessment Summary, Suitability Selection Summary, Report Summary, and Report Delivery Summary. At the bottom of the sidebar is the 'Add Participants' button, which includes a small icon of a person and the text 'Add new participants to the group.'</p>

Steps

Screen Shot

2. Enter the number of candidates or leaders who will take the assessments in the “**Number of ID’s in group**” field.

Note: It is a best practice to generate a few more IDs than needed. If more candidates or leaders are added to the event or candidate position, this step saves you time later.

3. Enter ABC123 in the **Password/Password Prefix for ID’s** field.

Note: HALO will generate passwords with the word “ABC123” in the beginning and a random set of numbers at the end.

4. Click **Save and Continue**.

Add Participants Enter number of participants and password

Add Participants Upload Participants

Number of ID's in group A 4 digit random number will be assigned to each ID. [e.g. 1234]
If password prefix is provided then a 4 digit random number will be appended to the password prefix [e.g. hogan1234]

Password/Password Prefix for ID's

Fields marked with an asterisk * are required.

UPDATE! [What's this?](#)

5. Confirm the information in the **Assessments and Reports** screen is correct.

6. Click **Save and Continue**.

Assessments and Reports Review Assessments and Reports available for new participants

Please review the groups assessments information and reports information. The new participants will be set up with these assessments and reports. If you would like the new participants to be set up with these assessments and reports, then click on the 'Save and Continue' button. Otherwise click on the 'Cancel' button and new participants will not be created.

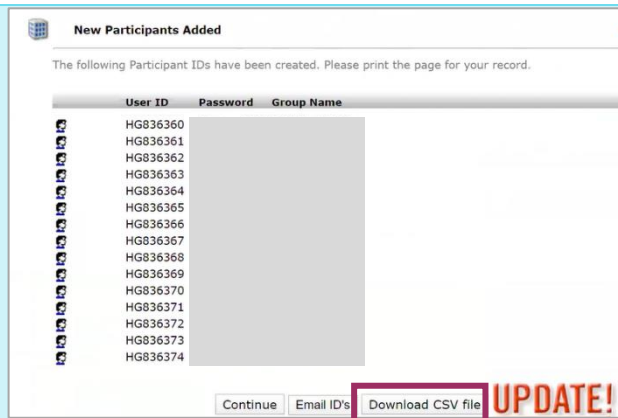
Number of New Participants:
Password/Password Prefix:
Assign 4 digit random password: Yes

Assessment Name	Assessment ID
Hogan Development Survey	HDS
Hogan Personality Inventory	HPI
Motives, Values, Preferences Inventory	MVPI

Report	Norm	Language	Suitability
PKG-Lead Series + Coaching + Flash	Global	English (American)	

7. Click **Download CSV file** to download an Excel document with the user IDs and passwords.

Note: If more user IDs and passwords are needed for a group in the future, repeat steps 1 – 7 to generate an additional Excel document.



Relate the IDs and Passwords to the Leader Information

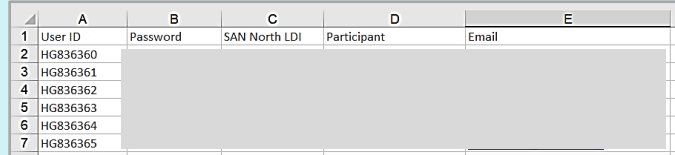
Once you create the CSV file in Excel, enter the name of the candidates or leaders and their email addresses in the document.

Steps	Screen Shot
<ol style="list-style-type: none"> Open the Excel document. Save the Excel document in the S drive > Corp Talent Development > Hogan User IDs and Passwords folder for future reference. <p>Note: The name of the document includes:</p> <ul style="list-style-type: none"> The location of the department/group and the event name (e.g., LDI) position Or, the name of the open position. The current date at the end of the file name in the MMDDYYYY format (e.g., 04142020) <p>Note: Inserting the current date is a new requirement, so many documents will not include the date.</p>	
<ol style="list-style-type: none"> Click and drag the column borders to see the information clearly. Add the Participant and Email columns to the file. 	

Steps

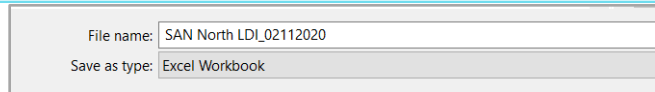
Screen Shot

5. Enter each candidate or leader's name in the Participant column to specify the name of the person who will be assigned the user ID and password.
6. Enter the candidate or leader's email in the Email column.
7. Repeat steps 5 and 6 for the remainder of those in the group.



	A	B	C	D	E
1	User ID	Password	SAN North LDI	Participant	Email
2	HG836360				
3	HG836361				
4	HG836362				
5	HG836363				
6	HG836364				
7	HG836365				

8. Save the Excel file.



File name: SAN North LDI_02112020
Save as type: Excel Workbook