Instructions: How to Set Up Your Enterprise Account?

Read the Enterprise product page on our website carefully:
http://www.ocai-online.com/products/ocai-enterprise

At the bottom, click on: Go Enterprise (make sure you are logged out!)

It will take you here: http://www.ocai-online.com/ocai-enterprise-registration

STEP 1

Enter a username and an email address that you haven’t used before (in case of OCAI One or OCAI Pro). The system will send a confirmation email and you must click the link in it to set your administrator password. Click the Log in button to set your password.

Note: Whitelist the ocai-online.com domain so you and your participants will receive the confirmation emails. Currently gmail/hotmail accounts are not accepted.

STEP 2

Next, enter your name and password and click on Save.
Once you created a new OCAI administrator account you can access it by clicking the Login link at the bottom of the page.

You will see the following:

**Note:** if you have tried the free OCAI One before, you will have a user account. However, to set up Enterprise or Pro accounts, you must create a new, separate user account as described above to become a survey administrator. **Don’t** use your OCAI One details. **Don’t** use your Pro administrator details if you have them. You need a separate administrator account for Enterprise survey accounts.
This screen gives the overview of this administrator’s (you) Enterprise account.

The Company List provides a list of companies (if applicable) that this user has created accounts for. This is NOT a list of all companies that used OCAI online to date. This information is private and secure.
If you are a consultant serving multiple client organizations, you may see a list of “Your Companies”.
Click on the tab Assessment List.

ASSESSMENT LIST

This page shows a list of assessments created to date by this user and where you can create a new assessment.

CREATE ASSESSMENT

The next step is to create a new Enterprise assessment. Here’s where you fill out the required information and specifics for your Enterprise Assessment:

The first time you create a new Enterprise assessment, you will also create a new company that is linked to this assessment. This company does not have to be the same as the company that will take part in the assessment. The company entered is the company that will pay the invoice. If a second assessment is created you can choose to select an existing company or create a new one.

1. **Assessment Name**: Make this as specific as possible. Instead of “Coca Cola”, fill in: “Coca Cola Marketing South Africa” if that were your location and unit.

2. **Contact Person**: don’t worry about address details - you will fill this out in the next phase.

3. **Organization Size**: choose the size from the option

4. **Economic Activity**: choose the industry group from the drop down menu

5. **Logo**: upload the logo. This could be your organization’s logo or your client’s logo (if you are a consultant).
6. **Country**: choose from the drop down menu. If you do not select a country here, participants will be able to select their country during their registration. This comes in handy if participants are from more than 1 country.

7. **Advanced Introduction Page**: You can leave this blank or add an extra text you’d like your participants to read. For instance, a CEO can add a specific message to stress the importance of the survey and how the participant’s input is appreciated.

8. **Text Format**: a scroll down menu with Full HTML, Filtered HTML or Plain Text. Simply select Full HTML.

9. **Advanced Field**
Here you can customize the registration before the assessment. You decide which departments, features or demographics you’d like people to identify for - so you may be able to order sub-profiles for separate categories.

The format of advanced fields can be:
* a question with a text field (allows a one-sentence answer).
* a feature with radio buttons (people must choose one of the buttons/options)
* a feature with a check box (people can check multiple boxes/options)
* a question with a comment field (allows a longer answer).

**Note:** Make sure to check the Field is Required check box where appropriate.

**Title**
Enter the identifying feature or question you’d like people to answer.
For instance: I am part of [radio buttons: department A OR department B]

**Type**
Choose the type of answer field that applies to your feature or question.
Radio Buttons, Check Box, Answer Field or Comment Field

**Options**
Here’s where you type the names of departments or demographics you’d like to distinguish - the contents of the Radio Buttons or Check Boxes.

You can add as many demographics as you like, when you click the green button: Add Another Item.

**General Advice on the number of sub-profiles**
Please be aware of the cost when you add demographics. You can see our current pricing schedule on the Enterprise product page and in the General Proposal document you can download from the Enterprise product page.
It’s also wise to take the number of participants into account. Our cost structure depends on the number of sub-profiles and not participants. If you have a small company and sub-profiles count less than 15 people, it may become costly and less private for people to do the survey if not all colleagues actually do the survey. This rule of thumb does not apply for management or executive teams and boards. Their numbers are smaller by nature, yet it’s very relevant to see their collective culture profile - as compared to others in the organization.

Add those sub-profiles which you think can provide interesting insights and thus add the most value. Where do you expect different points of view? Which teams are so typical, or are experiencing challenges, or (another reason) that they should work with their separate culture profile?

10. Language
Tick the box for the languages you’d like to activate for this assessment. Click Next at the bottom of the page. You will arrive at:

CREATE NEW OCAI ENTERPRISE COMPANY

Here’s where you enter the billing details that will appear on the invoice. American organizations don’t pay sales tax because our main office is located in Europe. **Note:** in Europe, VAT may apply. The system will ask for a valid VAT number to waive the VAT within the European Union. If you don’t have a VAT number, the VAT of your EU country will be added to the total price.

**Note:** Make sure to remove dots and spaces from your VAT number and include the country code.

When you click Next, you will receive the message: Enterprise Assessment Created. That is good news! However, you can not use your customized Enterprise account until we have checked it and you have paid.

When you go back to your User Account Overview, and you click the tab Assessments again, you can see its status is pending.

What happens next?

PAYMENT REQUEST BY OCAI ONLINE

After you have set up your assessment, we will check it for you and we calculate the price based on the number of requested sub-profiles. You’ll get a notification when everything is all right and you can proceed to pay.
Please note that this may take a business day - but sometimes we can check your assessment sooner and you can get started the same day!

**PAY YOUR ASSESSMENT AND INVITE PARTICIPANTS!**

Log back on with the user account you created. Click the tab Assessments, and next, click Pay.

The screen Checkout presents your invoice. You can adjust your billing details here, if necessary, and when everything is all right, click on: Continue to Next Step.

Review Your Order is the last screen to check your order. Below, you must click on the payment provider to proceed.

The payment provider for online payments can be linked to your bank account, Paypal account or credit card. We accept Visa or Mastercard. You can set up an online payment account if necessary - just follow the instructions.

**Note:** credit card companies often refuse larger foreign payments. It might be a good idea to check the cards’ limit before starting the payment process.

Click on Next Step to start your online payment.
When you have paid, you will be brought back to the page: Checkout Complete.

Here you can find a link to download your invoice.

INVITE PARTICIPANTS

From the Assessment List tab with your Enterprise surveys, click on edit/view to go to your specific Enterprise assessment.

Here are the assessment links to copy into an invitation email to invite participants. If you use multiple languages, you’ll have multiple assessment links for ONE Enterprise assessment.

When you invite participants, you have to use the correct link provided by our system. You are not allowed to use other, shortened or cloaking links to invite participants to the assessment. These links interfere with the registration process causing technical issues and inconvenience for the participants.

**Assessment link:** [http://www.ocai-online.com/ocai/pro/proexample](http://www.ocai-online.com/ocai/pro/proexample)

**Dutch assessment link:** [http://www.ocai-online.com/ocai/pro/proexample?language=nl](http://www.ocai-online.com/ocai/pro/proexample?language=nl)

**Note:** if you want to test your Enterprise assessment, make sure to LOG OUT of your administrator account before you click the link for participants.

At the bottom of the page, you’ll find extra materials to download.
STOP ASSESSMENT

When your participants have done the assessment or time is up, you can close the survey by clicking on ‘stopped’ and the Update button at the bottom of the page. When you stop the assessment you CAN NOT open it again! So please think twice before you do.

From the Assessment List tab with your Enterprise surveys, click on Results to see the number of participants to date. You can’t see who they are (due to privacy legislation and participant’s anonymity).

In general, we recommend to leave the assessment open for 2 weeks. You may need to send a reminder to all participants if you see that participation is not yet what you hoped for. Then, when time’s up, close your assessment.

The system will notify us and we’ll start working on your results. Your report is created manually by one of OCAI online’s consultants. In general, we aim to deliver your Enterprise Results Report within five business days. However, when we are very busy this might take a bit longer.

In case of a very tight time schedule on your side and just to be sure: please email us to align our workload planning with yours! We will do our best to help you.

It is our motto to develop the workers, the workplace and the world. May the OCAI culture survey serve as a great starting point to develop your organization.

Questions? Email marcel@ocai-online.com