

# Welcome to TMS Global

## Quick Start Guide to Bureau Service processing

TMS Global allows you to process Team Management Systems (TMS) profiles, provide access to your respondents and access content produced by TMS. This guide should provide all the information you need to get started. **Summaries of the set-up stages 1-4 are included for your information; however, stages 5-7 (pages 3-5) are the most relevant to you. If you do need additional guidance our team are always happy to help.** You can also find frequently asked questions via the question mark/help link (top right of the TMS Global screen):



NOTE: This guide is intended for those TMS accredited practitioners who are using our **Bureau service**, if you wish to move to self-service administration, please do let us know and we'll send you the relevant information.

In your TMS Global account you'll see a dashboard, as a Bureau client the main items you'll use are **Reporting** and **Facilitator Resources** (we encourage you to explore the resources available to use in your work with the profiles).



## Quick start videos

Appreciating some people like text guidance whilst others prefer to see things in action, in addition to the guidance contained within this Quick start, we've also developed a series of short videos for key functionality within the site.

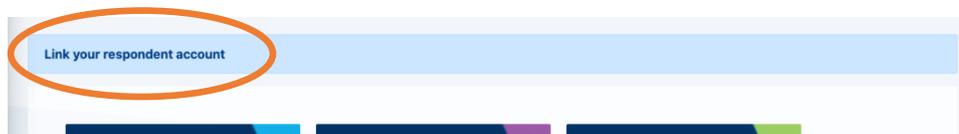
Please [click here](#) to access the video library from our support page for TMS Global (you can also download self-service and Bureau service documentation here). Where a video clip exists to support the text guidance, please look for the  icon which will contain a hyperlink to the relevant video from this list. The videos that are especially relevant for you whilst using the Bureau service are numbers 8-11, highlighted in green below (1-7 are to support self-service users, the Bureau service covers these functions).

Videos relating to set-up and therefore for self-service and TMSDI Bureau	Videos relevant to you in extracting and downloading profile reports
<ol style="list-style-type: none"><li>1. Managing Subscriptions</li><li>2. Groups &amp; Projects</li><li>3. Creating Individual Respondents</li><li>4. Creating Respondents in Bulk</li><li>5. Re-sending Activation Emails</li><li>6. Groups &amp; Projects (Advanced)</li><li>7. Setting up / Sending Questionnaires</li></ol>	<ol style="list-style-type: none"><li>8. <b>Manually Releasing Profiles</b></li><li>9. <b>Downloading Profile Reports Individual / Group / Project</b></li><li>10. <b>Group Summary Reports</b></li><li>11. <b>Advanced Reports (Team Maps)</b></li></ol>

## Linking your respondent account to your facilitator account

If you have completed your own profile on TMS Global, you can **link your respondent account** to your **facilitator account**:

- To do this: log into your facilitator account at <https://tms.global/Facilitator> and click on blue banner: '**Link your respondent account**', follow the onscreen instructions and enter the email address and the password you use to access your account.



Linking your accounts in this way will allow you to easily switch between your two accounts. Allowing you to view your own profile and replicate the experience that your respondents have when they view their profiles, and then switching to manage and view the Groups and Projects in your Facilitator account. To switch between your accounts, you will need to click on the double arrows, to the left of the question mark/help link (top right of the screen):



## Diagnostics for Respondents

Respondents who access their profile(s) via their TMS Global account will also have access to several diagnostics which form part of the product. If you have your own profile in TMS Global you'll be able to experience these diagnostics yourself. If you need further details on what's included, please do let us know.

## Change Organisation function

If your facilitator account is linked to multiple organisations, you can switch between these organisations via the **Change Organisation** tile on the dashboard. IMPORTANT: Please ensure that you are using the correct organisation when searching for respondents, groups or projects.

## Your facilitator account

Note: To navigate quickly to another section of your facilitator account, use the menu drop down, to return to the previous screen you were viewing please use the site's back button and not your browser (both are located the top left of the screen):



## Set-up stages 1 to 4 can be completed by our client services team on your behalf as part of our Bureau service:

### **Stage 1 – Groups** (internal departments or external clients)

*Our client services team set-up relevant Groups for you when they administer your programmes.*

\*Every respondent (delegate/participant) who will complete a questionnaire will need to be a member of a **Group**.

To help manage and filter your profile data, we recommend that you use **Groups** for internal departments within your organisation or for external client organisations. This will then allow you to filter your profile data by those departments/organisations as well as by programme/event (see projects in stage 2).

### **Stage 2 – Projects** (events, programmes, interventions)

*Our client services team will set-up relevant Projects for you when they administer your programmes.*

To help organise your data further, especially if you are running multiple programmes for an internal department or external client, we recommend that in addition to Groups you also use **Projects**. This allows an extra level of filtering.

### **Stage 3 – Respondents** (participants, delegates, coachees, profile owners, attendees)

**BEFORE** respondents are added to TMS Global, they should receive a briefing which outlines the completion of the profile questionnaire and provides deadlines. You'll find a sample briefing at the end of this guide you can also download this from our [TMS Global support page](#).

*Our client services team can send the standard briefing on your behalf, you can opt for this service when completing the Bureau Details Form. Our client services team will set-up and activate Respondent accounts for you when they administer your programmes.*

 **MULTIPLE GROUP/PROJECT MEMBERSHIP:** It is possible for a respondent to belong to multiple groups or projects. To add a respondent to additional groups and/or projects, locate their account through **Manage People** and edit their group and/or project memberships.

*If you are processing a new programme through our Bureau, our client services team will help with this, however if you wish to add an existing respondent to an additional Group or Project, you do have the user rights to do this.*

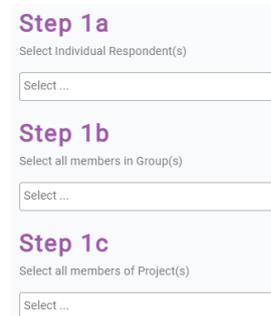
## Stage 4 – Setting up and sending questionnaires

*Our client services team will set-up and send questionnaires for you when they administer your programmes.*

Once respondent accounts have been set-up, they'll require access to the relevant profile questionnaire(s) that you would like the respondent(s) to complete. This can be done Individually, by Group or by Project.

### **IMPORTANT:** Manually releasing profiles

We know that the design of some development programmes will require there to be a delay in the release of profiles. If you have opted to delay a profile's release, your respondent will not be able to view it until you or our client services team manually enable the release. **If you have selected delayed release on your Bureau Details Form, and opted to release the profiles yourself:** click **Manage Products** in the main dashboard:



- Click **Release Product Access**.
- Select either the Individual, Group or Project for which you'd like to release the profile(s).
- Click **Next**- a list will be generated indicating which respondents' profiles will be released. Check this list and if you are happy to release the profiles of all listed, click **Process**.
- If you wish to continue to withhold any profiles untick the relevant box before clicking **Process**.

## Stage 5 – Find, view and download profile reports

**TOP TIP:** An overview of your Group or Project

The **Manage Groups** and **Manage Projects** options on the main dashboard allow you to access an overview of your Group or Project, including whether accounts have been activated, which Questionnaires have been completed or are pending and also whether delayed release is active on an account.

- To access this view, click on either **Manage Groups** or **Manage Projects**.
- Locate the Group/Project you'd like to view, and click this icon (the number indicates how many respondents are in the Group/Project): 
- You will then see all your respondents and a status report within each – if you require more detail you can click through into their respondent account.
-  If there is a clock icon showing in the top right of a respondent account 'tile' this indicates that their profile has been set with delayed release and the respondent does not yet have access to their profile (see note above re manually releasing profiles).

### Finding individual profiles

- You can quickly access and view **Individual** profiles by clicking **Manage People** from the main dashboard, searching for the individual, and clicking on their account.
  - Their existing profiles will be shown at the bottom of the page.
    - Profiles for which you are the facilitator can be viewed via the  icon.

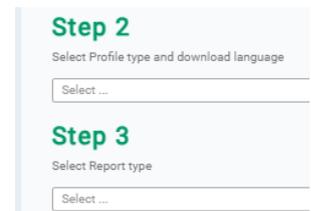
- If you need access to any other profiles listed, you can request the respondent shares these with you via the  icon.

- You can also filter the data by specific groups or projects using the dropdown menu on the right of the screen within **Manage People**. This allows you to quickly see which respondents have a profile available to view and identify who may need a reminder.

Alternatively, to view or download respondents' profiles for which you are the facilitator, click **Reporting** on the main dashboard



- Click **Individual Reports** and select whether you wish to view the report(s) of a single individual, group or project by using the drop-down fields.
- Select the profile (the download language if working with the Team Management Profile) and the report type from **Step 2** and **3**.
- Check that the selections are correct and click **Next** in **Step 4**.
- A list will be generated of respondents to be included, check this is correct and then click **Create** to produce your reports, which will then be generated and downloaded.



## Stage 6 – Accessing Summaries and Advanced Reports

### Group Summaries

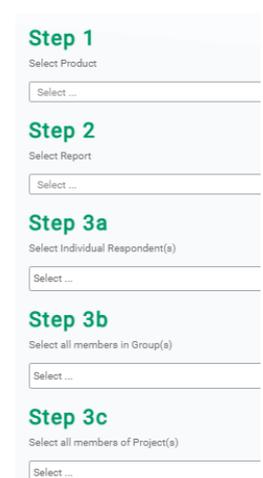
- From the **Reporting** menu, click **Group Summary Reports**.
- Choose the individuals, group or project that you would like to create a summary for, select the profile including language for the TMP (Managerial is English) and the Report Template.
- Select the Report Template from the **Step 3** – e.g. **Team Management Profile Group Summary**.
- Check that the selections are correct and click **Next** in **Step 4**.
- A list will be generated of respondents to be included in your report, check this is correct and then click **Create** to produce your report, which will then be generated and downloaded.



### Advanced Reports

These are aggregate team reports and the team maps of TMS Global – when using our Bureau service, if you wish to access the Advanced Report for a programme, you will need to complete the relevant section of the Bureau Details Form. Advanced Reports are available for the Team Management Profile, the Opportunities-Obstacles Quotient Profile (QO<sub>2</sub>) and the Window on Work Values Profile.

- From the **Reporting** menu, click **Advanced Reporting**.
- Choose the Product in **Step 1**, the Report required in **Step 2**, and in **Step 3** the individuals, group or project to be included in the Advanced Report.
- **Step 4** allows you to select the output type, either PDF, Word or PNG image files.
- **IMPORTANT:** Additional report options are in development and will appear in the Step 2 menu drop down when available. The TMP Advanced Report is available in **Norwegian**, if you would like this adding to your account please let us know.
- Check that the selections are correct and click **Next** in **Step 5**.



- A list will be generated of the respondents to be included in your report, check this is correct and then click **Create** to produce your report, which will then be generated and downloaded.
- NOTE: Some reports can only accommodate a limited number of respondents to ensure readability – for example names on the Team Management Wheel. This will depend on the spread of preference in the team, and there are indicators on each report option to advise which ones may be limited.

## Other menu options

You will notice various other menu options in your account on TMS Global, these are primarily for self-service users, however if you have any queries about any of these please do let us know.

## Briefing your respondents: Sample briefing for the Team Management Profile

### Purpose

The following provides a step-by-step process for your respondents to activate their TMS Global account, complete their questionnaire, and access resources they may need to prepare for their individual or team debrief.

This template can be used as an initial correspondence with your respondent before they receive an invitation to activate their TMS Global account and complete their questionnaire. **Please customise the template to fit your own needs**, noting that where brackets [ ] appear, information specific to you is required.

- **Please pay special attention to section 3**, to ensure that the activities match what you would like your respondents to complete – noting that if respondents receive their profile report on TMS Global, they will automatically have access to the Diagnostics that accompany the TMP on TMS Global.

Note – If you need copies of the briefing templates for the Window on Work Values Profile or the Opportunities-Obstacles Quotient (QO<sub>2</sub>) Profile please let us know.

### Email Template

Subject: Your Team Management Profile – [event title] – [date]

Dear [Respondent's name]

For the upcoming session please complete the Team Management Profile Questionnaire. The TMP provides insights into work preferences, serving as a tool to enhance communication and drive high performance. As part of the learning process, please be prepared to share your profile at the session.

After completing the questionnaire, you will be able to access your personalised report, delving into how you prefer to work, where you are likely to focus your energy and potential development areas. You may like to watch this [short video](#) to learn more about the TMP.

To ensure you get the most out of the upcoming session, please allocate preparation time beforehand. Here is a checklist of things to do before the session:

#### 1. Activate your TMS Global account

You will soon receive an email from [noreply@tms.global](mailto:noreply@tms.global) inviting you to create a TMS Global account. Click on the link and follow the steps to activate your account.  
*Please check your spam/junk folder if you don't see this email.*

#### 2. Complete the TMP Questionnaire by [date]

In TMS Global, select the orange task on your account Dashboard and complete the questionnaire (15 mins).  
*If you are using a smartphone or device, you will need to use the TMS Global app (App Store or Google Play) to complete the questionnaire.*

#### 3. Preparation for your Debrief on [date]

From your Team Management Profile page on TMS Global:

- a. Download and read your Team Management Profile report. (30 mins)
- b. Download the Personal Discovery Workbook (TMP) and complete pages 4 and 15 (15 mins)
- c. Download and complete the My TMP in 3-2-1 worksheet. (15 mins)

If you have any questions, please contact me on [contact name/phone/email] - I look forward to exploring your profile with you soon!

[Name]

**TMP Accredited Practitioner**

## Activation email sample

Below is an example of the activation email sent to respondents from your TMS Global Portal, inviting them to create a TMS Global account. Respondents must click on the link, they will be prompted to accept terms and conditions and create a password to activate their TMS Global account.

This email is sent from [noreply@tms.global](mailto:noreply@tms.global). If respondents can't see this email, please ask them to search their junk or spam folders. If no-one at an organisation receives the activation email, they may need to request their IT department to whitelist the email address to allow the activation emails to pass through their online security systems.

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### Sample

**Subject: Action required: Please activate your TMS Global account**

Hi [Respondent's name],

You have been invited to create a TMS Global account.

Your activation link is:

[\[Link\]](#)

Your activation link is valid for 21 days.

Please use Google Chrome or Edge when using TMS Global.

Alternatively, download the TMS Global app for an optimised mobile experience.

Kind regards,  
Team Management Systems

