

# Welcome to TMS Global

## Quick Start Guide to self-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, 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 doing their own administration, if you would prefer to work with our Bureau service, where we do your set-up administration, please do let us know and we'll send you the relevant information.

In your TMS Global account you'll see a dashboard, we'll cover the function of some of the menu items in this guide. We encourage you to explore the resources available to use in your work with the profiles which can be found in **Facilitator Resources**.



## 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:

1. Managing Subscriptions
2. Groups & Projects
3. Creating Individual Respondents
4. Creating Respondents in Bulk
5. Re-sending Activation Emails
6. Groups & Projects (Advanced)
7. Setting up / Sending Questionnaires
8. Manually Releasing Profiles
9. Downloading Profile Reports Individual / Group / Project
10. Group Summary Reports
11. Advanced Reports (Team Maps)

## Subscription Stock

**IMPORTANT** –Subscription stock is required prior to setting-up questionnaires for completion – we also recommend that you obtain stock before you start to set-up any respondent accounts.

- Stock is held as subscriptions in your TMS Global account.
- You will need the corresponding number of subscriptions in your account BEFORE you are able to set-up questionnaires for your respondents.
- To check your subscription stock, click **Available Product Subscriptions** from within the **Manage Products** menu:

## Manage Products



- New subscription stock can be ordered via our client services team and there is no minimum order quantity. This is also the route to bulk purchase where you have budget to use. Our team will work with you to confirm your order and add the subscriptions to your account.
- Instant ordering: depending on your organisation's purchasing processes, it may be possible for you to order subscriptions stock as you need it from within your account, and we will invoice you in the normal way. Please email [accounts@tmsdi.com](mailto:accounts@tmsdi.com) if you are interested in this functionality.
- Invoices are raised for the number of subscriptions ordered (whether via our client services team or instant ordering) at the point they are purchased and added to your stock, regardless of when the subscriptions are used.

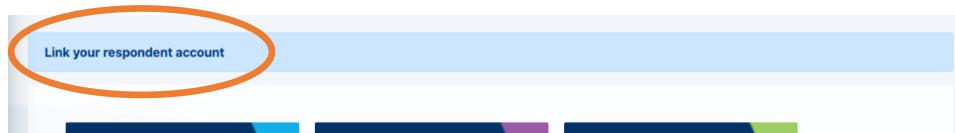
### Questionnaires and Tasks

- Each questionnaire set-up generates a Task in the relevant respondent account, it also uses a subscription unit from your stock.
  - If respondents in a group or project change before they complete their questionnaire, it is possible to revoke the subscription and reallocate it through the **Manage Products** menu.
  - If the questionnaire has already been completed, the subscription cannot be revoked or reallocated.
- Subscriptions do not have an expiry date until they are allocated.
- IMPORTANT after a subscription is allocated, even if revoked, it will expire 12 months from the date of the first allocation – meaning that once they are taken from stock a questionnaire associated with that subscription must be completed within 12 months. When subscriptions are revoked, they are returned to your subscription stock and will be used next to manage expiration dates.

### 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

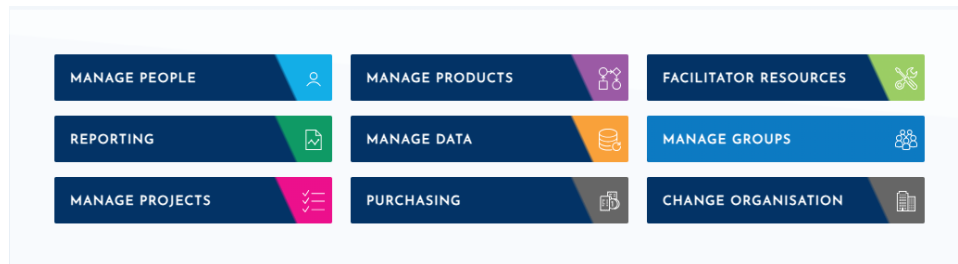
If your facilitator account is linked to multiple organisations, you can switch between these organisations via the **Change Organisation** tile on the dashboard. IMPORTANT: Please ensure that you are using the correct organisation when searching for respondents, groups or projects.

## 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):



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



\*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).

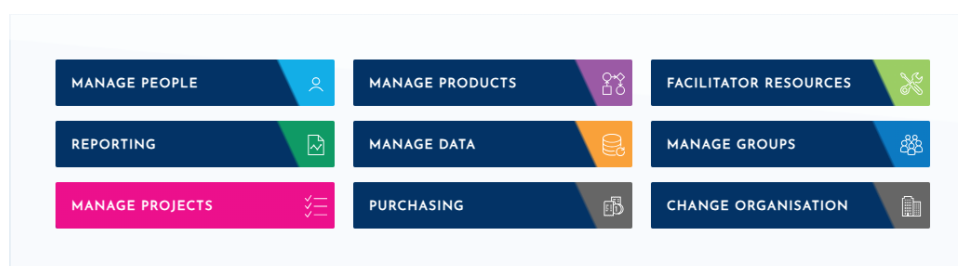
- Click **Manage Groups** from the main dashboard
- Give the Respondent Group a meaningful name that will help you locate it in the future, and then click **Add**

For example, you may have groups called: **Finance, Sales & Marketing, Customer Services**

OR you may have groups called: **XYZ Ltd, ABC PLC, SME Consultancy**

You can add new Groups at any time. If you already have groups that you regularly work with, you may find it helpful to set them in up in advance as placeholders for the future. You can edit Group names in the future if required.

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



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.

For ease we recommend that Projects are set-up with the following naming conventions:

[Date] – [Programme Title] – [\*Facilitator Name] – \*if there are multiple facilitators in your organisation

Examples:      **11 December 2024 – Development project 1 – Sample name**

**16 January 2025 – Coaching – Sample name**

- Click **Manage Projects** from the main dashboard, input your chosen project name, and then click **Add**

You can add new Projects at any time. We recommend that if you are working with Projects, you add these as a placeholder before adding the associated respondents.

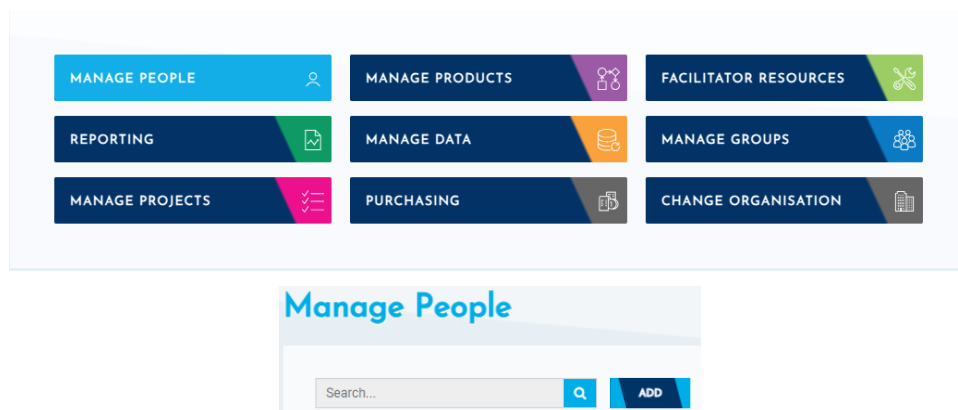
### Stage 3 – Respondents (participants, delegates, coachees, profile owners, attendees)

**BEFORE** Respondents are added to TMS Global, you should send them 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](#).

Once you have sent your briefing, you can create the associated respondent accounts on TMS Global. There are two ways of doing this – individually or via the bulk upload feature. The latter is the most efficient, noting that you can still add respondents individually if extra people are added to a Group/Project in the future. It is also possible to assign questionnaire subscriptions when adding respondents, or you can add these as a separate step if you wish.

#### **Creating Respondents individually**

- To create an **individual** respondent account click **Manage People** then click **Add**




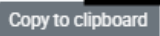

- Enter your respondent's details and allocate them to the relevant **Group** and, where applicable, a **Project**. If you've not already set-up the Group and/or Project (stage 1 & 2), it is also possible to do this as part of this process by inputting the details into the relevant field, you can also assign product subscriptions at this stage which will allow your respondent to complete their questionnaire once they have activated their TMS Global account:

## New Respondent

\*If a respondent participates in another project or is part of another group in the future, you will also be able to add them to that project/group as it is possible for a respondent to be a member of multiple groups and projects. Please see the end of this stage for guidance on adding Respondents to additional Groups/Projects.

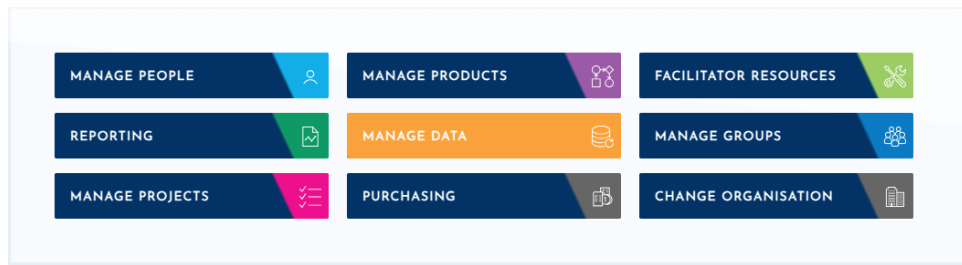
For the **Team Management Profile**, respondents will be able to change the language of their questionnaire, so if you are unsure which language they will complete in please use the business operating language for the organisation that you're working with.

- Once you have entered the details, click **Add**, this will generate an activation link\*
  - if you have ticked 'Send Activation Link' an email will be sent to your respondent (see the end of this guide for a sample copy of this). This email will enable them to complete the set-up of their TMS Global account, which they should do within 21 days – a new activation email must be sent if 21 days has lapsed. If you choose not to send the activation link at this stage you can do this later, but we recommend that it is sent at set-up.
  - If you have completed the Assign Product section, a subscription will also be assigned to the new Respondent account ready for completion, you can choose to assign products later by following the guidance in **stage 4**.  
\*You will need to choose if you would like to delay the release of the profile if you are assigning products. If you leave this unticked your respondents will receive their profile immediately upon completing the questionnaire. If you tick this and subsequently wish to give your respondents online access to their profiles, you can do this manually both at an individual level and also by Group/Project (see below). Note this function may have been disabled dependent on the requested set-up for your organisation, this means that the profile will be processed instantly for your respondent.
- \*  Each time the activation email is sent, a new activation link is generated. We recommend that you only resend activation emails when a link has expired or if your respondent cannot locate the original email. In all cases the most recent link should be used as previous link will lapse when a new one is created. You can either resend the activation link email from within TMS Global or copy the link to your clipboard and provide to your respondent by other means, which is useful where they cannot locate any of the incoming emails:

Activation Link [https://www.tms.global/Activate?code=\[redacted\]](https://www.tms.global/Activate?code=[redacted])  

## Creating Respondents in **bulk**

- To create respondents in **bulk** click **Manage Data** from the main dashboard




- Click **People** and then **Download Template**.



This will download a simple .XSLX file for you to enter or paste data directly into.

\*Only the Email address, First Name and Last Name are compulsory fields.

IMPORTANT – as per the instructions on the document, data must only be added from row 11 and onwards:

	A	B	C	D
1		<b>Instructions</b>		
2		Start listing Respondents on row 11 and onwards. A blank row will indicate to the system to stop importing.		
3		Email Address is the key field. Existing Respondents with the same email address will be ignored.		
4		<b>Email Address, First Name and Last Name</b> are compulsory fields. All other fields are optional.		
5				
6				
7	Template name:	Respondent Import		
8	Version:	1.3		
9				
10	<b>Email Address</b>	<b>First Name</b>	<b>Last Name</b>	<b>Job Title</b>
11				<b>Bio</b>

- Once you have completed your list, save the file (using the existing file name – and saving to a location that is easy to navigate to) and return to TMS Global. Remain within the **People** section of **Manage Data**, click **Import Respondents**:
  - Click on '**Choose file**' and navigate to where you have saved your XLSX file, select the file.
  - Select the time zone, tick the relevant boxes, add/select the **Group** and add/select the **Project** if applicable.
  - You can also if you wish assign product subscriptions at this stage, which will mean that when your respondent logs-in they are instantly able to access the questionnaire they are due to complete.

### Manage Respondent Data

- Step 1 – Download Respondent Import Template
- Step 2 – Follow the instructions in the template to populate your data
- Step 3 – Upload template to import and create new respondent accounts

#### Import Respondents

Import File:  No file chosen

Set Respondent time zone: (UTC+00:00) Dublin, Edinburgh, Lisbon, London

Preferred Language: International English

Send Activation Links ☒


Add to Groups (at least one is required):


Add to Projects (optional):

#### Assign Product (optional) ?

Select Product:

Select Facilitator:

- Click **Next**
  - If you have selected Send Activation Links, the associated emails will also be sent automatically to your respondents.  If you do not select Send Activation Links, you will need to manually send these individually through each respondent's TMS Global account.
  - You will be presented with the list of respondents for whom you have now set-up TMS Global accounts, this will also indicate the status of each account in relation to whether they have an existing profile so that you can choose who to assign a subscription to (if applicable) deselecting anyone you do not wish to assign a subscription to at this stage.
    - You may see that they already have a profile pending so don't require a new questionnaire. If you see a message indicating that they have an account on the AU server, please contact us if you need to include their data in an Advanced Report.
  - If you have completed the Assign Product section, and completed the step above, a subscription will be assigned to the new Respondent account ready for completion, you can choose to assign products later by following the guidance in **stage 4**. \*You will need to choose if you would like to delay the release of the profile if you are assigning products. If you leave this unticked your respondents will receive their profile immediately upon completing the questionnaire. If you tick this and subsequently wish to give your respondents online access to their profiles, you can do this manually both at an individual level and also by Group/Project (see below). Note this function may have been disabled dependent on the requested set-up for your organisation, this means that the profile will be processed instantly for your respondent.

 **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.

**IMPORTANT:** setting up Respondent accounts does not give access to any profile questionnaires – unless you complete the Assign Product sections as noted above.

## Stage 4 – Setting up and sending questionnaires

If you have not assigned a product subscription in stage 3 or you need to provide access to a profile questionnaire at a later date, you can do this Individually, by Group or by Project.

**IMPORTANT** – before you **Assign Product Subscriptions**, you first need to ensure that you have an adequate stock of subscriptions in your account (please see Subscription Stock on page 1 of this guide).

- To set-up questionnaires (if not already done when you added the respondent(s)) click **Manage Products** from the main dashboard and select **Assign Product Subscriptions**.



1. Select one option from either step 1a/1b/1c. Click in the field to view a drop-down list of the previously created **Individual Respondent** accounts, **Groups** or **Projects**:
2. In step 2 select the Product/Profile from the drop-down list.

### Step 2

Select Product

Select ...

3. Select the Facilitator within your organisation who is leading this Group/Project from the drop down.

\*Choose if you would like to delay the release of the profile.

If you leave this unticked your respondents will receive their profile immediately upon completing the questionnaire. If you tick this and

### Step 1a

Select Individual Respondent(s)

Select ...

### Step 1b

Select all members in Group(s)

Select ...

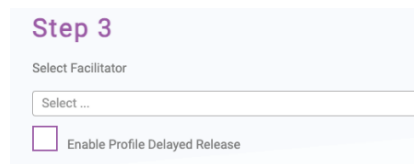
### Step 1c

Select all members of Project(s)

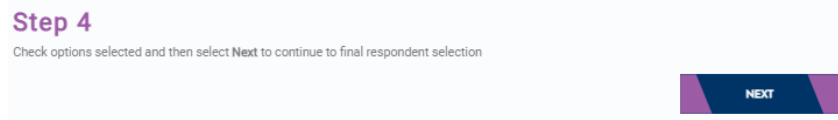
Select ...



subsequently wish to give your respondents online access to their profiles, you can do this manually both at an individual level and also by Group/Project (see below). Note this function may have been disabled dependent on the requested set-up for your organisation, this means that the profile will be processed instantly for your respondent.



- Check all the options are correct before clicking **Next**.



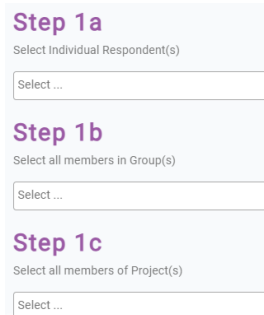
- A list will be generated indicating which respondents will receive a questionnaire. Check that all required respondents are included and click **Assign**. This will add a Task to the top of each respondent's account, allowing them to access and complete the questionnaire.



### 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 delayed a profile's release, your respondent will not be able to view it until you manually enable the release. To do this 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 a tile for each respondent in the Group/Project 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.

#### 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.

### Step 2

Select Profile type and download language

Select ...

### Step 3

Select Report type

Select ...

## 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.

### Group Summary Reports

#### Step 1a

Select Individual Respondent(s)

Select ...

#### Step 1b

Select all members in Group(s)

Select ...

#### Step 1c

Select all members of Project(s)

Select ...

#### Step 2

Select Profile type and download language

Team Management Profile (Managerial)

#### Step 3

Select Report Template

Team Management Profile Group Summary

### 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**.

### Step 1

Select Product

Select ...

### Step 2

Select Report

Select ...

### Step 3a

Select Individual Respondent(s)

Select ...

### Step 3b

Select all members in Group(s)

Select ...

### Step 3c

Select all members of Project(s)

Select ...

- 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.

## 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

