

Confirming your iMatter team –

When you log into your account click on the manage team tab and the page below should appear –

Please check your team details and confirm by 28/03/2015

Edit your team information and click **Confirm** to complete **Confirm: Team up-to-date**

Team name and manager(s)

Team name	First name	Last name	Email
Manual Development Team	David	Sterling	helpdesk@webropol.com

Team members

Add manually **Import Excel** Team members: 6

Search  

<input type="checkbox"/>	^ First name	↕ Last name	↕ Survey response method	↕ Email	↕ Address
<input type="checkbox"/>	Charity	Forester	Electronic ▼	nphillpscforester@test.com	
<input type="checkbox"/>	Gareth	Palin	Electronic ▼	gpalin@test.com	
<input type="checkbox"/>	Grace	Granger	Electronic ▼	ggranger@test.com	
<input type="checkbox"/>	Hope	Forest	Electronic ▼	hforest@test.com	
<input type="checkbox"/>	Michael	Spence	Electronic ▼	mspence@test.com	
<input type="checkbox"/>	Ruby	Stone	Electronic ▼	rstone@test.com	

Excluding team members

- Exclude any team members who are not eligible to complete the questionnaire (e.g. those on long term sick leave) by clicking in the square box next to their name.
- You can select as many or as few names as are needed.
- Once a name has been selected the Exclude button will show at the bottom of the screen.
- Click on Exclude From Survey to confirm this action.

Team members

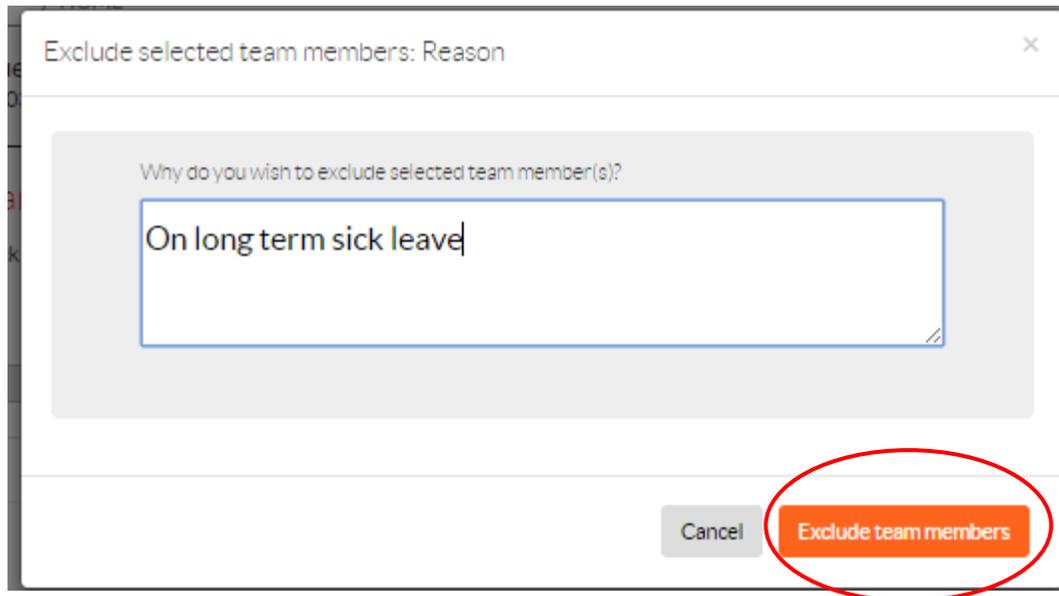
[Add manually](#) [Import Excel](#) Team members: 6

Search  

<input type="checkbox"/>	^ First name	↕ Last name	↕ Survey response method	↕ Email	↕ Address
<input checked="" type="checkbox"/>	Charity	Forester	Electronic ▼	nphilipsforester@test.com	
<input type="checkbox"/>	Gareth	Palin	Electronic ▼	gpalin@test.com	
<input type="checkbox"/>	Grace	Granger	Electronic ▼	ggranger@test.com	
<input type="checkbox"/>	Hope	Forest	Electronic ▼	hforest@test.com	
<input type="checkbox"/>	Michael	Spence	Electronic ▼	mspence@test.com	
<input type="checkbox"/>	Ruby	Stone	Electronic ▼	rstone@test.com	

[Exclude from survey](#) [Remove](#) [Print paper copies](#) [Confirm: Team up-to-date](#)

You will then get a box asking you why you wish to exclude – enter the reason here (eg “on LTS”) and click Exclude Team Members then OK on the next confirmation box



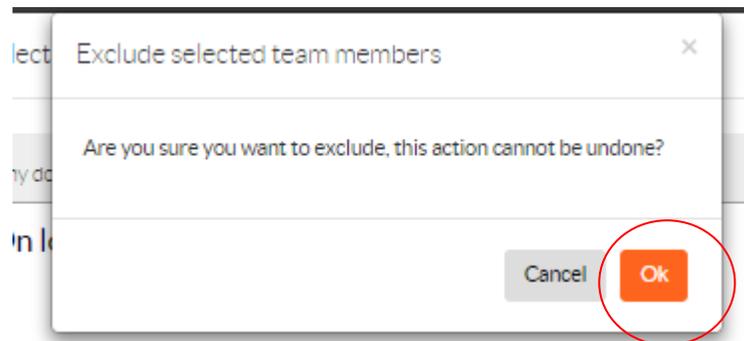
Exclude selected team members: Reason

Why do you wish to exclude selected team member(s)?

On long term sick leave

Cancel Exclude team members

The screenshot shows a dialog box titled "Exclude selected team members: Reason". It contains a text input field with the text "On long term sick leave". At the bottom right, there are two buttons: "Cancel" and "Exclude team members". The "Exclude team members" button is circled in red.



Exclude selected team members

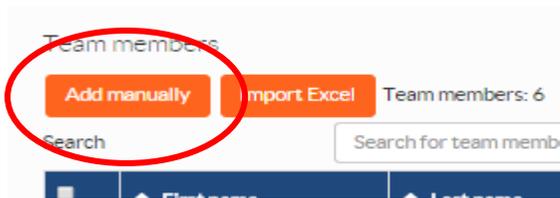
Are you sure you want to exclude, this action cannot be undone?

Cancel OK

The screenshot shows a confirmation dialog box titled "Exclude selected team members". It contains the text "Are you sure you want to exclude, this action cannot be undone?". At the bottom right, there are two buttons: "Cancel" and "OK". The "OK" button is circled in red.

Adding New Team Members

You can add team members to your team manually, using the add manually button.



Enter the team members first name and last name in the fields provided. These are mandatory fields.

If they have an email address (this can be a personal email) select Survey Response Method as Electronic

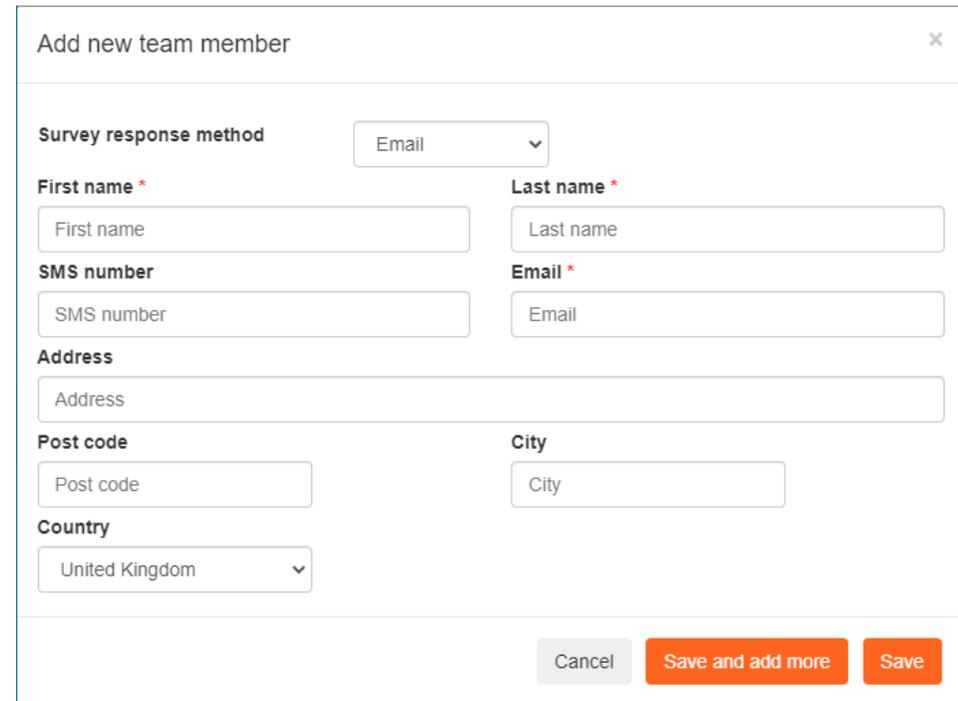
Enter an email address, this is a mandatory field if the electronic method is selected.

They can also opt to complete by text message – select SMS option and enter mobile number

The other option is to complete on paper – with this option you will need to print their survey to pass out

Click on save or save and add more if further additions are required.

Once you have completed any amendments click on the “Confirm team up to date” button to confirm your team.

A small orange button with the text 'Confirm: Team up-to-date'.A screenshot of a form titled 'Add new team member'. The form has a close button (X) in the top right corner. It contains several fields: 'Survey response method' (a dropdown menu with 'Email' selected), 'First name *' (a text input field), 'Last name *' (a text input field), 'SMS number' (a text input field), 'Email *' (a text input field), 'Address' (a text input field), 'Post code' (a text input field), 'City' (a text input field), and 'Country' (a dropdown menu with 'United Kingdom' selected). At the bottom right of the form, there are three buttons: 'Cancel', 'Save and add more', and 'Save'.

PLEASE NOTE: Once you have clicked on “Confirm team up to date” you will not be able to make any further changes to your team. If you require any further changes after you have confirmed please contact your local champion for further support.