Belbin Online System - Basic Navigation

Log in: Go to this link and then use your email address and password to log in or reset your password if required. https://interplace.belbin.com

User page: Your user page has the main navigation functions on the left side for creating groups, finding people, creating reports and accessing resources. Useful shortcuts are to be seen centre screen.

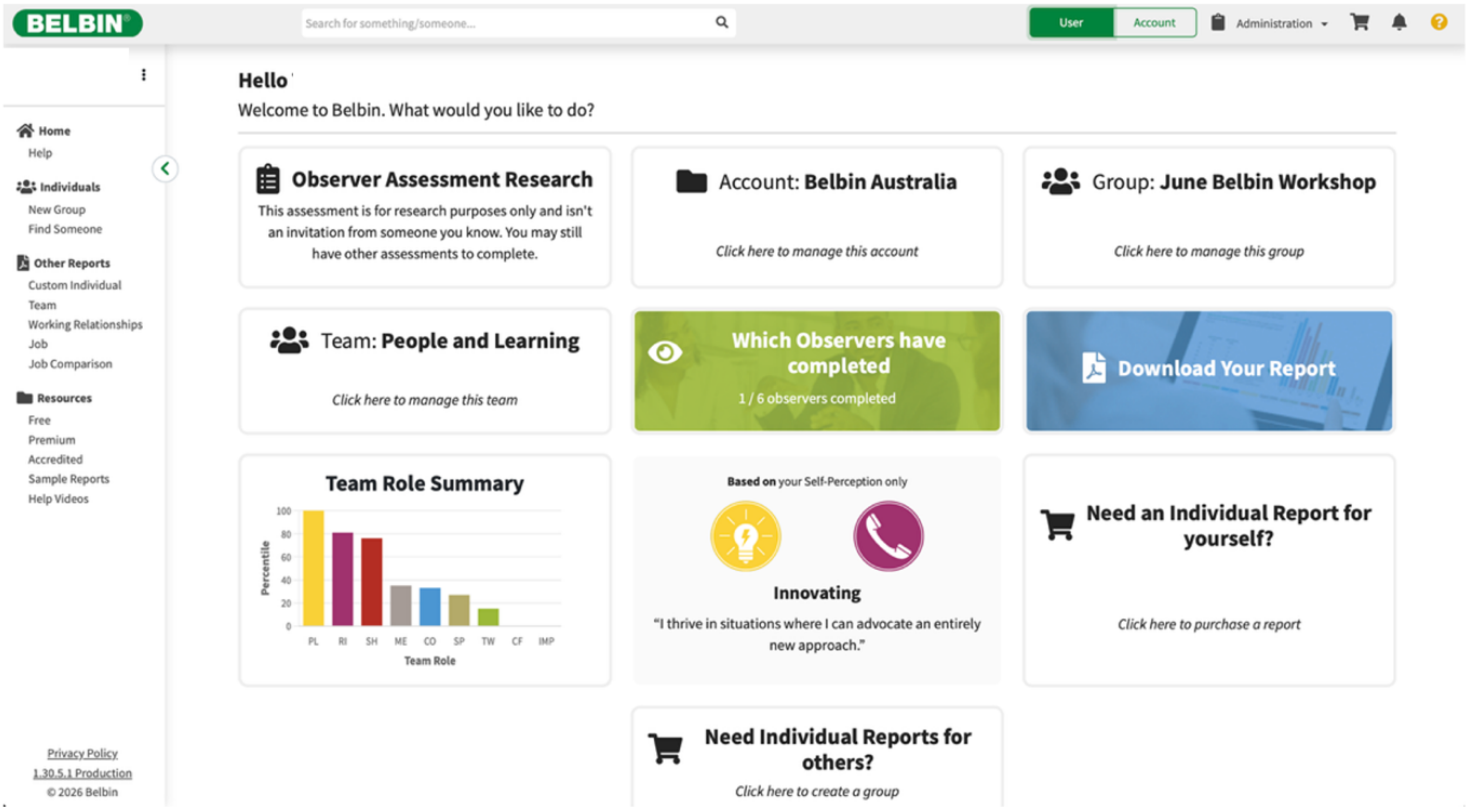
Switching between your personal 'User' and organisation 'Account': At the top right corner you can switch between your personal 'User' section and organisational 'Account' by clicking those tabs.

Logging Out and other functions: To log out and access some other functions click on the area where your name will appear top left under the Belbin logo.

Administration: Click Administration top right next to the User and Account tabs as a shortcut to administer individuals and accounts.

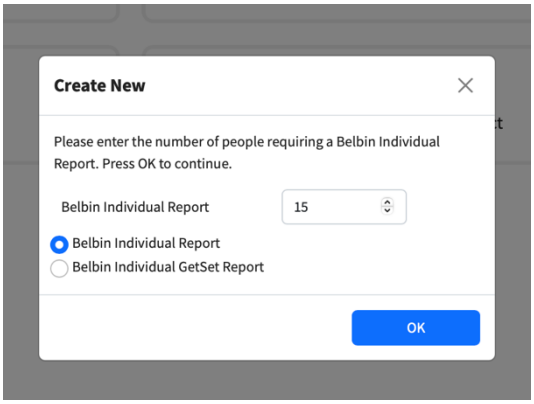
Shopping Cart: You can order new credits within your account by using the Cart icon top right of screen, from our Official Belbin Website Store or by requesting an invoice from us – Team@Belbin.com.au

Help Videos and Tutorials: Useful help videos are found in the left navigation panel under 'Resources'.

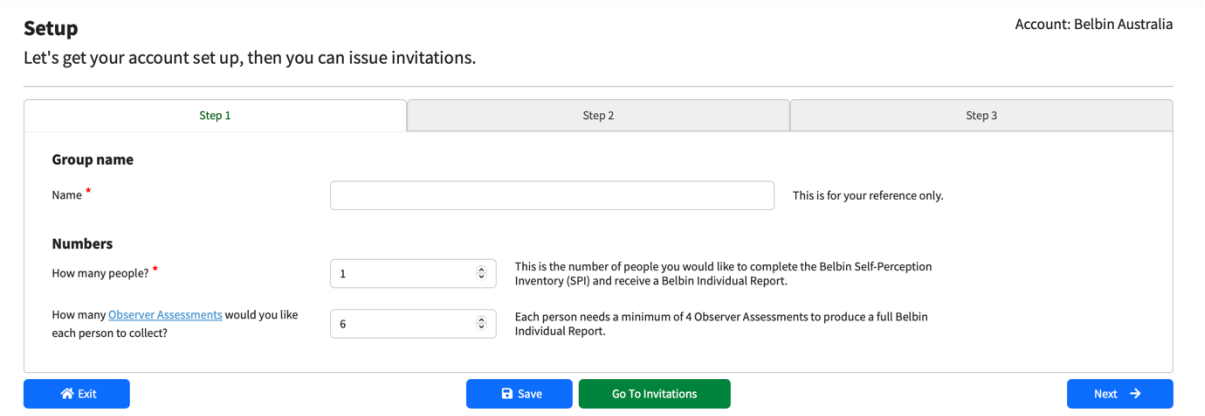


Setting up Groups and Sending Invitations

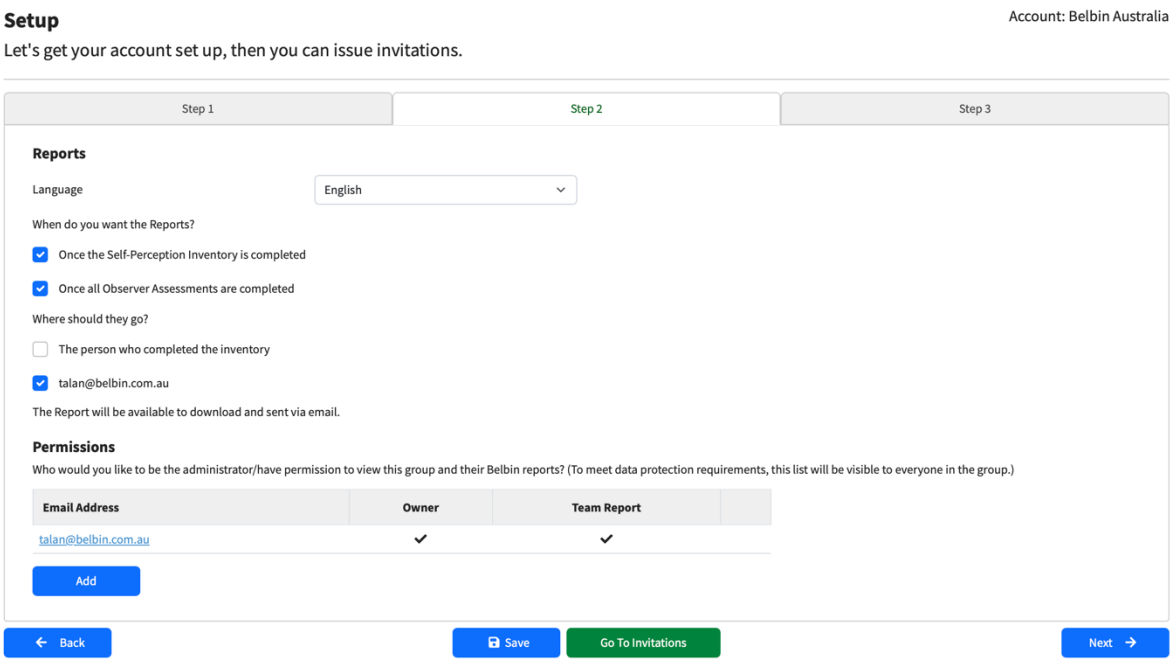
Create New Group: If setting up for an organisation you will usually switch to the 'Account' tab top right of screen first, then click 'New Group' from the left-hand navigation panel. Select how many people you'd like to set up for. If there are enough credits you will go to the next stage, and if not, be taken to cart or you can contact us to upload more credits into your account via invoice.



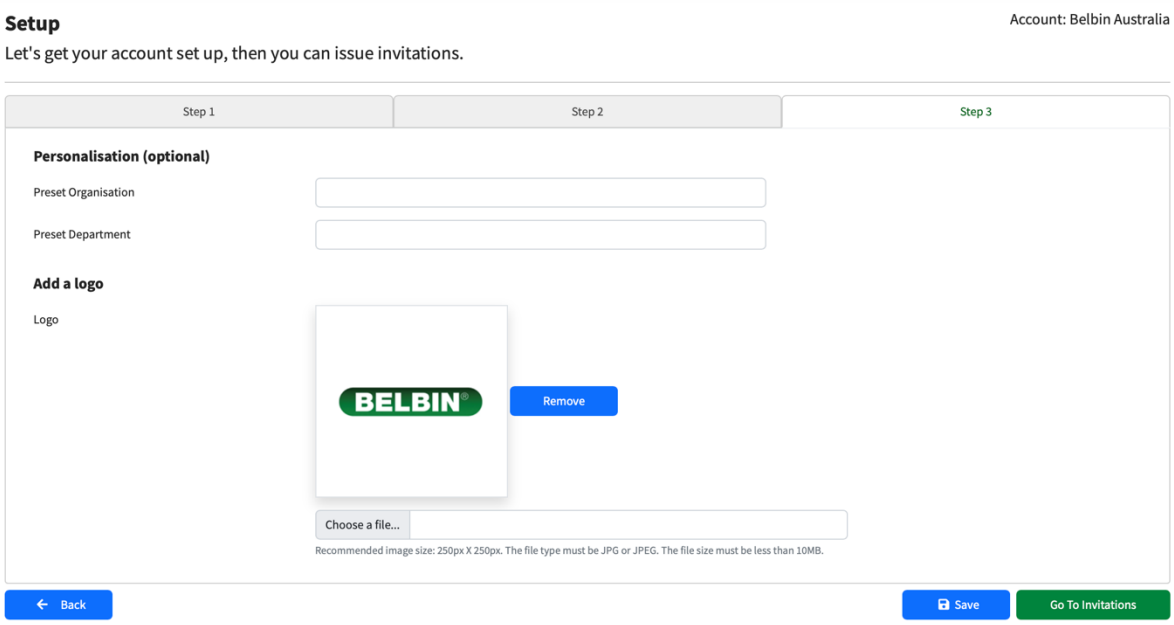
Step 1 of set up: Here you can name the group and select the number of Observers required. You can set for Self-Perception only by setting the number of Observers to zero, but Observers are highly recommended and free of charge. A minimum of 4 is required for all report pages to generate, 6 is optimal, more can be added if desired.



Step 2 of set up: Select when you'd like PDF of the completed report stages to be sent via email and select who they will be sent to. You can also select who has admin access to this account.



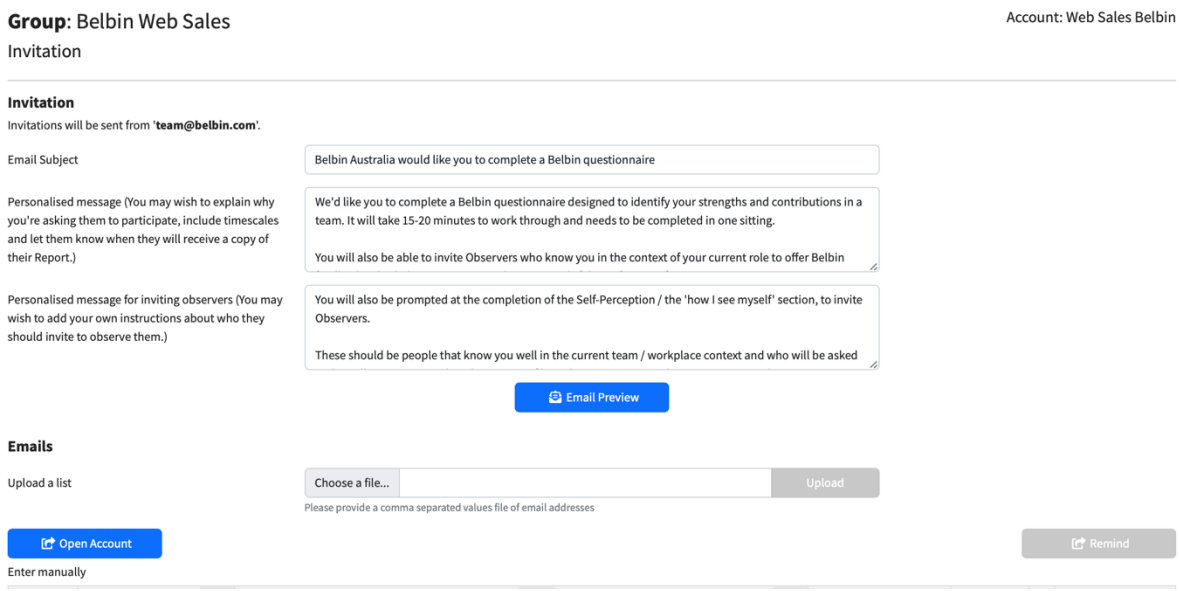
Step 3 of set up: Here you can name the organisation / department and add your own logo if you wish to.



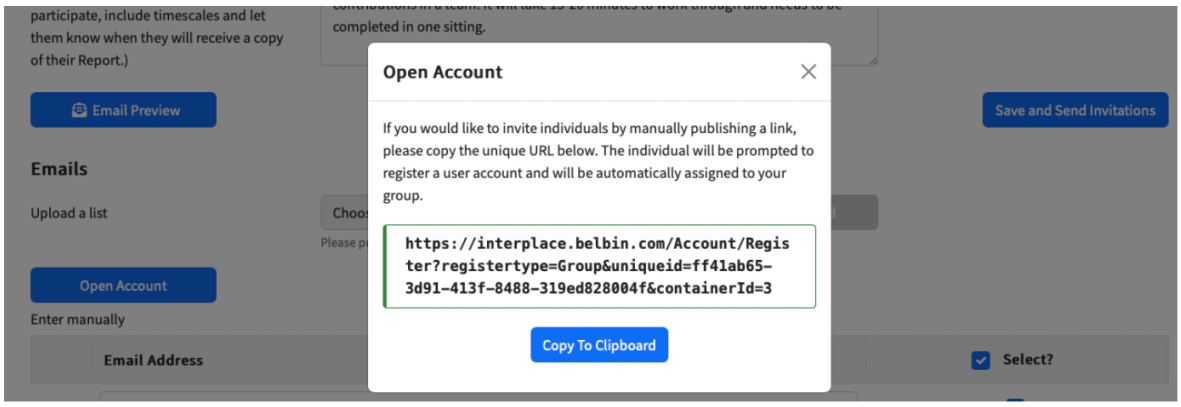
Go to Invitations: You can now go to the 'Invitations' page where you can tailor the wording of the invite email (recommended) that will be sent from the system to people and set up your invites. You can either enter the email addresses for each person or set up an 'open account link' where you will email a common link to each person for this account.

Option A - Enter Email Addresses: Enter the email addresses into the blank slots via manual entry / cut and paste - or from a .csv file with email addresses only and no spaces (use the upload list option under the 'Email Preview' tab). Then click 'Save' bottom right to send the invites.

The advantage of this is that you can send reminders to people by hitting the 'Reminder' tab in this section to chase up people do their own reports and / or remind Observers.



Option B – Create a common invite link: You can click the 'Open Account' tab to create a common link that can be copied and emailed to anyone you wish to do a Belbin in this account.



Other useful functions from your ‘Invitations’ page

You can return to the ‘Invitations’ page for a group at any time to undertake a number of useful functions.

Check Progress: You can see at the right of each person’s name who has completed their SPI and with how many OBS. You can then click on each to see more detail on observers and other features relating to that individual’s report.

Generate or email PDF of the reports: Select people from the far right of the page and then click the ‘Email Reports’ tab at the bottom of the page to email batches of PDF as required. You can also click a single PDF icon at the right of a person’s details to see just their PDF.

Account Settings: To go to the settings for this account to make any changes to the settings click the ‘Blue Cog Icon’ at the bottom of the page.

Team Reports: You can generate Team Reports from this page by selecting the people to be featured along the far right, then clicking the ‘Generate Team Report’ tab at the bottom of the page.

You can also click the ‘Other Reports’ – ‘Team’ option from the main navigation bar left of the page to find and place team members from any group you have into a Team Report.

BELBIN®

CONTACT US AT ANY TIME FOR SUPPORT AND ADVICE:

T – 1300 731 381

E – Team@Belbin.com.au

W – www.Belbin.com.au