



HOW DO I START A NEW PBC ASSESSMENT?

Section Links

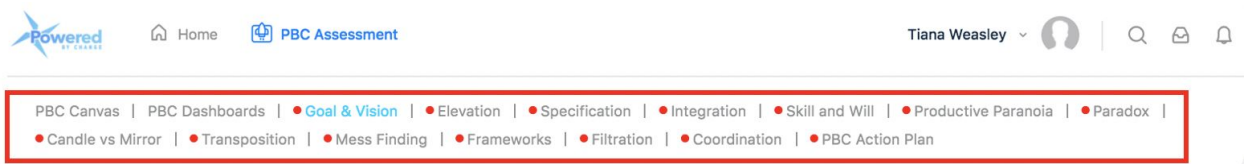
- How to start a new assessment?
- Ending an assessment?
- Start a new assessment
- Create a duplicate assessment (from the current version)
- Create a blank assessment
- Additional relevant How Do I Guides for reference

How to start a new assessment?

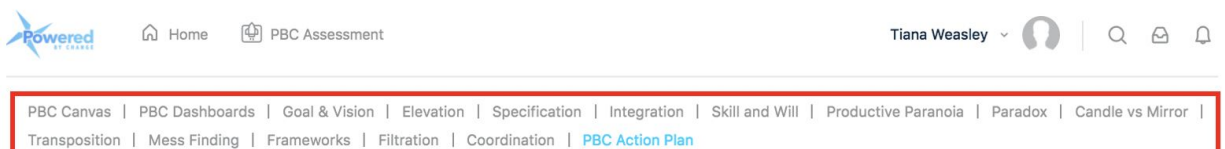
- To commence a new assessment, the existing assessment first needs to be completed
- Ending an assessment is important because without doing so a new one cannot be started

Ending an assessment?

- To end an assessment, first ensure all worksheets have been completed
- It's easy to tell which worksheets still need to be submitted as the name of the worksheet will have a red dot next to it in the menu at the top of the screen:



- Once all worksheets are completed and submitted, the name in the menu will no longer have a red dot next to it



How Do I Start a New PBC Assessment Guide

- Once all worksheets have been completed and submitted successfully, go to the PBC Action Plan worksheet

PBC Canvas | PBC Dashboards | Goal & Vision | Elevation | Specification | Integration | Skill and Will | Productive Paranoia | Paradox | Candle vs Mirror
Transposition | Mess Finding | Frameworks | Filtration | Coordination | [PBC Action Plan](#)

Version 4 - 2021-02-27

PBC ACTION PLAN

NAME: * Tiana Weasley

ASSESSMENT START DATE: * 26-02-2021

WHAT TO ACHIEVE: * Enter information

- 1. GOALS & VISION +
- 2. PURPOSE +
- 3. PEOPLE & PRODUCT +
- 4. PROCESS +
- 5. ACTION PLAN +

- Select the 'Confirm and End' button
- This is located at the end of the PBC Action Plan worksheet

PBC Canvas | PBC Dashboards | Goal & Vision | Elevation | Specification | Integration | Skill and Will | Productive Paranoia | Paradox | Candle vs Mirror |
Transposition | Mess Finding | Frameworks | Filtration | Coordination | [PBC Action Plan](#)

Version 4 - 2021-02-27

PBC ACTION PLAN

NAME: * Tiana Weasley

ASSESSMENT START DATE: * 26-02-2021

WHAT TO ACHIEVE: * Enter information

- 1. GOALS & VISION +
- 2. PURPOSE +
- 3. PEOPLE & PRODUCT +
- 4. PROCESS +
- 5. ACTION PLAN +

SAVE

SUBMIT

CONFIRM AND END

- Refer to the 'End a PBC Assessment' How Do I Guide for the full details of how to do this

How Do I Start a New PBC Assessment Guide

Start a new assessment

- Once the assessment has ended a new assessment can be created
- To do this, in the Version menu on the left-hand side, select the option to 'Start New Version'

PBC Canvas | PBC Dashboards | Goal & Vision | Elevation | Specification | Integration | Skill and Will | Productive Paranoia | Paradox | Candle vs Mirror | Transposition | Mess Finding | Frameworks | Filtration | Coordination | PBC Action Plan

- Version 1 - 2021-02-26
- Version 2 - 2021-02-26
- Version 3 - 2021-02-26
- ✓ Version 4 - 2021-02-27
- Start New Version

PBC ACTION PLAN

NAME: * ASSESSMENT START DATE: * WHAT TO ACHIEVE: *

- 1. GOALS & VISION +
- 2. PURPOSE +
- 3. PEOPLE & PRODUCT +
- 4. PROCESS +
- 5. ACTION PLAN +

- This gives us two options
- These are to create a new version:
 1. That is a blank version,
 - This creates an entirely blank version that needs to be completed in full
 2. Or a version from the current version
 - This creates a duplicate of the current version that just needs to be updated

Start New Version

PBC ACTION PLAN

NAME: * ASSESSMENT START DATE: * WHAT TO ACHIEVE: *

?

Start new version

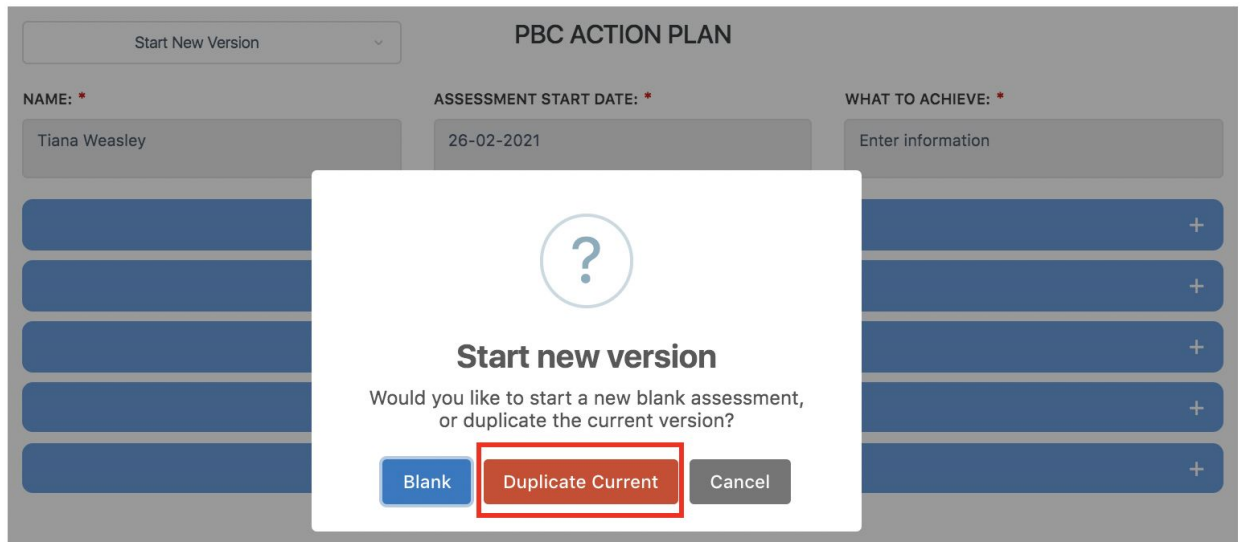
Would you like to start a new blank assessment, or duplicate the current version?

- 1. GOALS & VISION +
- 2. PURPOSE +
- 3. PEOPLE & PRODUCT +
- 4. PROCESS +
- 5. ACTION PLAN +

How Do I Start a New PBC Assessment Guide

Create a duplicate assessment (from the current version)

- To create a duplicate version, select this option



The screenshot shows a web form titled "PBC ACTION PLAN". At the top left, there is a dropdown menu labeled "Start New Version". The form has three main sections: "NAME: *", "ASSESSMENT START DATE: *", and "WHAT TO ACHIEVE: *". The "NAME" field contains "Tiana Weasley", the "ASSESSMENT START DATE" field contains "26-02-2021", and the "WHAT TO ACHIEVE" field contains "Enter information". Below these fields are five blue horizontal bars, each with a plus sign on the right. A white dialog box is centered over the form. The dialog box has a question mark icon at the top, followed by the heading "Start new version". Below the heading is the text "Would you like to start a new blank assessment, or duplicate the current version?". At the bottom of the dialog box are three buttons: "Blank", "Duplicate Current", and "Cancel". The "Duplicate Current" button is highlighted with a red border.

- This creates a PBC Assessment that is pre-populated with the information from the last assessment

How Do I Start a New PBC Assessment Guide

- You can then go through each worksheet and update it as required

Version 5 - 2021-02-27 GOALS & VISION WORKSHEET

Assessment Date: * 2021-02-27 Name: * Tiana Weasley

GOALS

1. What is it that you want to achieve or do? *

Update information

2. Is this related to your personal life, professional life or both? *

Professional Life

3. By when do you want to achieve this? *

31/03/2021

4. Why is this important to you? *

Update information

5. What are your top 1 to 3 goals related to this and how will achieving these make you feel? *

Top 3 Goals	How will you feel if you achieve these?
Update Goal 1	Update information

- Each worksheet can then be updated and saved, or submitted once it is fully completed

How Do I Start a New PBC Assessment Guide

Create a blank assessment

- To create a blank version, select the 'Blank' option

The screenshot shows the 'PBC ACTION PLAN' interface. At the top, there is a 'Start New Version' dropdown menu. Below it, there are three input fields: 'NAME: *' with the value 'Tiana Weasley', 'ASSESSMENT START DATE: *' with the value '26-02-2021', and 'WHAT TO ACHIEVE: *' with the value 'Update information'. A modal dialog box is centered on the screen, featuring a question mark icon and the text 'Start new version' followed by 'Would you like to start a new blank assessment, or duplicate the current version?'. At the bottom of the dialog are three buttons: 'Blank' (highlighted with a red box), 'Duplicate Current', and 'Cancel'.

- This creates an entirely blank PBC Assessment that we then need to complete in full

The screenshot shows the 'GOALS & VISION WORKSHEET' form. At the top, there is a dropdown menu showing 'Version 6 - 2021-02-27'. Below it are two input fields: 'Assessment Date: *' with the value '2021-02-27' and 'Name: *' with the value 'Tiana Weasley'. The main section is titled 'GOALS' and contains five numbered questions, each with a corresponding input field:

1. What is it that you want to achieve or do? *
2. Is this related to your personal life, professional life or both? * (Dropdown menu with 'Both' selected)
3. By when do you want to achieve this? * (Date input field with 'dd/mm/yyyy' placeholder)
4. Why is this important to you? *
5. What are your top 1 to 3 goals related to this and how will achieving these make you feel? *

The last question is followed by a table with two columns: 'Top 3 Goals' and 'How will you feel if you achieve these?'. The table is currently empty.

How Do I Start a New PBC Assessment Guide

- Each worksheet can then be updated and saved, or submitted once it is fully completed
- There is a recommended sequence to complete the PBC Assessment worksheets
- This is outlined in the '[Complete the PBC Assessment](#)' How Do I Guide

Additional relevant How Do I Guides for reference

- For more information on ending an assessment and updating every worksheet, refer to the following How Do I Guides:
 - '[End a PBC Assessment](#)'
 - '[Navigate between Worksheets in the PBC Assessment](#)'
 - '[Update Worksheets in the PBC Assessment](#)'
 - '[Update the Goals and Vision Worksheet](#)'
 - '[Update the Elevation Assessment Worksheet](#)'
 - '[Update the Specification Assessment Worksheet](#)'
 - '[Update the Integration Assessment Worksheet](#)'
 - '[Update the Skill and Will Assessment Worksheet](#)'
 - '[Update the Productive Paranoia Assessment Worksheet](#)'
 - '[Update the Paradox Assessment Worksheet](#)'
 - '[Update the Candle versus Mirror Assessment Worksheet](#)'
 - '[Update the Transposition Assessment Worksheet](#)'
 - '[Update the Mess Finding Assessment Worksheet](#)'
 - '[Update the Frameworks Assessment Worksheet](#)'
 - '[Update the Filtration Assessment Worksheet](#)'
 - '[Update the Coordination Assessment Worksheet](#)'
 - '[Update the PBC Action Plan Worksheet](#)'