

# NEW McQuaig Online Reference Guide<sup>®</sup>



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#### The New McQuaig Online Dashboard



This is the Dashboard page of the site. You can select **Send** one survey, **Send Multiple** surveys, or **Quick Enter** by clicking on any one of these options.

When you scroll down you will see on the left a list of surveys in the **Inbox** – these are surveys that have been completed. On the right is the **Pending** surveys – these are surveys that have been sent and are awaiting completion.



# **Dashboard Page**



On the Dashboard page you can also go directly to the list of completed **Assignments** (assessments), **Comparisons** (composite reports), and **Settings** (assigning/managing users/groups) by clicking the options at the top of the screen.



#### Send One Assessment

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	Label	
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After selecting **Send** on the **Dashboard**, you will see this screen where you can select the assessment you are sending out by clicking the down arrow under **Assessment** and fill in the candidate/employee email, name, gender, and language along with the number of days given to complete the assessment. Then select **Submit.** The assessment will be sent to the candidate/employee via email with a notification from McQuaig. The notification includes a link to the assessment and it appears as this:

Hi XXXXX,

You've been invited by [McQuaig Online Account Name] to complete an online McQuaig Survey. The completion deadline is YYYY-MM-DD. A link to the survey can be found at the bottom of this email. If you have any questions, please contact [McQuaig Online Account Name]

[Please click here to launch the survey]

If this link does not work, please copy and paste the following into your browser window: [http://online.mcquaig.com/survey/m1450122891244997269210951545337]

Regards, The McQuaig Institute <u>McQuaig.com</u>



#### Send Multiple Assessments

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					Submit			
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If you are sending the survey to multiple candidates at once, you can select **Send Multiple** from the Dashboard and it takes you to this screen.

You can enter details manually or upload a csv file.

Entering multiple delegate's manually:

Enter the first persons email, **First Name**, **Last Name** and **Gender**. Then click the **Arrow/Add to List.** Enter all candidates/employees that you will be sending the survey to.

Once you have entered the names of the candidates/employees that you are sending the assessment to, on the right, select the **Assessment** by clicking the down arrow, the **Language** to send the assessment to the candidate in, the **Expiry Date**, and input a **Label** for this group to ensure they are grouped together, then select **Submit**. All assessments will be sent to the candidates at the same time. They will appear under the Pending folder on the Dashboard.



### **Send Multiple Assessments**

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	maureen@sample.com	Maureen	Sample	F	×	English	•	
	John@sample.com	John	Sample	м	×	Expires In (days) *		
	lisa@sample.com	Lisa	Sample	F	Add to List	15		
	brian@sample.com	Brian	Sample	М		Label •		
						Sales Position Candidates		
						Group		
						Angela MacDonald Demo (not in group)	•	
						Submit		

Uploading a csv file for multiple assessments:-

Create a spreadsheet in CSV format containing 4 columns: email, first name, last name, gender (M,F). **Do not include headers**. Select **"upload csv file"** from under the **Send Multiple** heading. Select the spreadsheet from your folders. Pick an **assessment type** and assign it a **label** to ensure the **assessments** are grouped together. Click **Submit**.

If there is an error in the email address or the assessment fails to deliver you will receive the following message:

Our email service failed to delivery to the email address lisa@sample.com. The reason provided was "Bounced (4.0.0)".

Please click [here] to fix the address and send again.

Regards, The McQuaig Institute McQuaig.com



# **Quick Enter Option**

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To enter scores manually, select **Quick Enter** and it takes you to this screen. Select the type of assessment scores you need to enter by clicking one of the options including **Word Survey**, **Job Survey**, **Occupational Test (MOT)**, or **Self Development Survey**.



# **Quick Enter: Job Survey**

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For example, if you selected **Job Survey**, this screen will appear. You can enter the **First Name, Last Name, Label, Language** and **Job Title**. Then enter the scores manually at the bottom of the page for each of the four traits. The scores must total **168**. Select **Submit** and the scores will be entered and the report will be available.



## **Inbox and Pending**



Once you have sent the survey/s to a candidate/employee, it will appear on the **Dashboard** under **Pending**.



## **Resend or Delete a Survey**

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	Gender:	Male 🥓										
	Label:	Sales Position C	andidates 🖋									Ξ
	Group:	Angela MacDono	ald Demo (not in group) 🖋									
	Language:	English										
	Created:	2015-12-09										
	Creator:	Angela MacDono	ald (McQuaig Institute)									
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To **Resend** or **Delete** a Survey, select the survey that was initially sent, select **Resend Assignment** or **Delete Assignment**.



# **Editing/Changing Survey Details**



To change details including **Email**, **First Name**, **Last Name**, **Gender** or **Group**, select the assessment, click the pencil icon beside the section to be changed and edit the details.



# Assignments

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First	Last	Email	Туре	Sent	Status	Label	Profile Type	
Linda	Sample	Linda@sample.com	Word Survey	2015-12-09	Open			
Brian	Sample	brian@sample.com	Word Survey	2015-12-09	Open	Sales Position Candidates		
John	Sample	John@sample.com	Word Survey	2015-12-09	Open	Sales Position Candidates		
Lisa	Sample	lisa@ sample.com	Word Survey	2015-12-09	Open	Sales Position Candidates		
Maureen	Sample	maureen@sample.com	Word Survey	2015-12-09	Open	Sales Position Candidates		
Competitive	Specialist		Word Survey	2015-12-09	Completed		Specialist	
Independent	Enthusiast		Word Survey	2015-12-09	Completed		Enthusiast	
Competitive	Enthusiast		Word Survey	2015-12-09	Completed		Enthusiast	
Enthusiast	Sample		Word Survey	2015-12-09	Completed		Enthusiast	
Independent	Cooperator		Word Survey	2015-12-09	Completed		Cooperator	
Cooperator	Specialist		Word Survey	2015-12-09	Completed		Cooperator	_
Independent	Specialist		Word Survey	2015-12-09	Completed		Angela MacDonald Specialist	l Demo

The **Assignments** page provides a list of assessments that are **Complete**, **Open**, or **Expired** in your account. It identifies the **Type** of assessment, when it was **Sent**, the **Status** of it, the **Label** (if there is one), and the **Profile Type**.

The last 50 assessments are shown in this list – to search for other assessments not listed here you can select **Filter By.** 



# Filter By

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srian	Sam	le brian@sar	mple.com	Word Survey	2015-12-09	Open	Sales Position Candidates	S An	gela Ma	cDona	ld Dem

To search for an assessment that is not listed on the **Assignments** page, select **Filter By** and this screen will appear. Fill in some or all of the detailed information including **Name, Email, Group** (select group name), **Status (Open, Completed, Expired, Delivery Failed), Type (Word Survey, Job Survey, Occupational Test – MOT, Self-Development Survey), Sent (Date/Time Frame), and Label. Select Apply. This will pull up any assessments related to your request.** 



# **Filter By**

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Lisa Sample	lisa@sample.com	Word Survey	2015-12-09	Open	Sales Position Candidates	
entries match the specifie Export Data to CSV	ed filters.					

After you select **Apply**, this screen will appear with all related reports based on the information that was input in the previous screen.

You also have the option to export data to CSV.



## **Generate Reports: Job Survey**

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To generate reports you can go to the Dashboard or Assignments page to select the report. To retrieve a **Job Survey**, select the candidate/employee from the **Assignments** page and this screen appears. Select **Generate Report**.



# **Generate Report: Job Profile**

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After selecting **Generate Report** you have the option to select **Job Profile** or **Job Fit Interview Guide**.



# **Generate Report: Job Profile**

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When you select **Job Profile**, this screen appears and you can select the sections of the report that you would like included along with the **Interview Questions Type**. You also have the option to include a candidate/employee **Word Survey** to compare to this **Job Profile** by entering the **Email/First Name/Last Name** and select **Find**. This will provide a drop down list of names related to your request; select one.



## **Generate Report: Job Profile**



This report is created and will provide you with the details of that benchmark/ position and what you are looking for in a candidate.



#### **Generate Report: Job Fit Interview Guide**

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If you select **Job Fit Interview Guide**, this will produce the report that compares the candidate/employee to a benchmark for the position you are interviewing them for, identifies if they are a **Strong Match**, **Potential Match**, or **Not a Match**, along with additional interview questions.



# Job Fit Interview Guide

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This screen appears when you select **Job Fit Interview Guide**. You can select the **Interview Questions Type**, the name of the person that you would like to compare their **Word Survey** results to this benchmark, and select **Generate**. This will generate the **Job Fit Interview Guide** (and the **Word Survey Report** if candidate/employee is included).



# Job Fit Interview Guide: Report



The **Job Fit - Interview Guide** can be opened in a Word Document format. The **Job Fit – Interview Guide** provides you with insight about the candidate and how strong of a match they are for the position along with detailed interview questions in relation to each trait.



## **Generate Reports:**

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	Last Nam	ne: Specialist 🖉			Situational DO:	21						
	Gender:	Female 🖋			Situational SO:	18						
	Label:	empty 🥓			Situational RE:	61						
	Group:	Angela MacDon	ald Demo (not in group) 🖋		Situational CO:	68						
	Language	e: English			Real DO:	16						
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To generate other reports once it is complete, select the report from the **Dashboard** page or the **Assignments** page. This page will appear. It includes the information about the candidate/employee on the left and the **Response** on the right which includes the **Profile Type**, **Duration** (length of time it took to complete the assessment), and the **Situational** and **Real Scores**. To retrieve a copy of the detailed report, select **Generate Report**.



#### **Generate Reports: Select Report Type**

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After selecting **Generate Report**, this screen will appear. Select the type of report that you want to retrieve by clicking **Word Survey**, **Feedback Report**, **Interview Guide** or **Self Development Report**.



## **Generate Reports: Word Survey**

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	Management Overview		
	Motivating Factors		
	Coaching and Development Strategies		
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	Interview Questions Type		
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After you select the **Word Survey** report to generate, this screen appears where you can select the sections of the report that you want to include. Click each section to check or uncheck the portions to include.



### **Generate Reports: Word Survey**

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Scroll down and select the type of interview questions (General, Management, or Sales) by clicking Interview Questions Type. Select Job Fit and the position you'd like to compare the candidate/employee to (if applicable), select the Language. Once you click Generate, at the bottom left, you will see a message noting 'The report is now generating and will download when complete.' The report will open in a Word Document format.

Once the report is ready, it will show as a download in the bottom left corner – click on it and it will open.



# **Report Available**



The report is now available as a Word Document.



#### **Generate Reports: Feedback Report**

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The **Feedback Report** is a brief summary of the candidate/employee profile and a copy which you can give to them. Select **Feedback Report** and **Generate** to produce this report as a Word Document.



#### **Generate Reports: Feedback Report**



The report will be opened in a Word Document.



#### **Generate Reports: Interview Guide**

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The **Interview Guide** provides details about the candidate along with interview questions. Select **Interview Guide** and this screen appears for you to select **Interview Questions Type, Job Profile,** and **Language.** Then select **Generate** to produce the report as a Word Document.



#### **Generate Report: Interview Guide:**



The report will be opened in a Word Document.



#### **Generate Report: Self Development Survey**

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The **Self Development Report** provides coaching and direction for the candidate on each trait, identifying their strengths and areas for development. Select **Self Development Report** and **Generate** to produce this report as a Word Document.



#### **Generate Report: Self Development Survey**



The report will be opened in a Word Document.



#### Comparisons

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You can create **Comparison** reports with the titles created under **Comparisons**.

**Comparisons** option allows you to create, select and compare reports such as Word Surveys and Job Surveys. As you create these Comparisons/Groups, a list will develop under Comparisons/Groups.



### Comparisons

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By selecting one of the titles under **Comparisons**, such as **Profile Types Compared**, it then displays this screen. Here you can select **Set Composite**, then **Add Assignments** and this will calculate and display the **Composite** and **Average** scores on the left for those candidates/employees/reports and the type of report that is listed in this Comparison Group on the right. You also have the options to **Clear Composite**, **Display Comparison**, or **Delete Comparison**.



# **Display Comparison**



When you select **Display Comparison** you will see this composite graph. The top row is the **Composite** of the assessment results of each candidate/ employee/report and each trait. Below that includes the scores for each candidate/employee/report that was included in this **Comparison**.



# Groups

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When you select the **Group [Sales Reps]** from the Comparisons page it will present this screen and allow you to **+Add New** comparisons.

By selecting the **+Add New** you will enter a title for this group.



# Groups

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Once the title **[Sample Comparison of Sales Reps]** is created, this screen appears. Here you will select **Add** beside **Assignments** to add the profiles you want to compare.



## **Groups: Add Assignments**

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When you select **Add** under **Assignments** on the previous screen, the **Filter By** screen appears so you can search for the reports you want to compare. Enter the information here and select **Apply**.

Once those profiles are added and are listed under **Assignments**, select **Set Composite** (on the previous screen) to calculate the **Composite** and **Average** scores. You have the option to **Display Comparison** or **Delete Comparison**.



## **Frequently Asked Questions**



If you have a question about the NEW McQuaig Online, you can check the **FAQ's** (Frequently Asked Questions) by clicking the question mark (?) and then clicking the **FAQ's**. Or you can email our support desk at <u>info@holstgroup.co.uk</u>



# **Frequently Asked Questions**



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When you select the **FAQ's** this screen appears where you can click each question to see the answer. If this does not provide you with the information you require, please call us on 0845 456 4000 or email us at <u>info@holstgroup.co.uk</u>.



# **Forgot Password**

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If you forgot your password, at the Login page, select Forgot Your Password.



# **Forgot Password**

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This screen will appear. Enter your email and select Reset Password.



#### **Reset Password Confirmation**

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Request submitted. Check your email for instructions on how to proceed. You can now close this window or tab.



Once you reset your password, this screen will appear confirming that your request has been submitted and to check your email.



#### **Forgot Password Notification via Email**

This is the notification you will receive via email. Click the 'here' link and it will take you to the screen to reset your password.

Hi Angela,

You recently requested a new McQuaig Online account reset.

Click [here] to create/reset your account.

If you did not request this reset, rest assured that your account is safe. Account reset requested through our website are only sent to the contact email on the account. If you're worried that someone is trying to gain unauthorized access, go ahead and reset the account, or contact a company administrator for assistance.

Regards,

The McQuaig Institute McQuaig.com



#### Set New Password/Reset Password

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Once you receive the email notification, select the link in your email. This screen will appear to **Set a New Password**. Enter your **New Password** and **Confirm Password**, and then select **Submit**.



# **Password Reset**

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After you have reset your password you will see this confirmation screen stating that 'You have successfully reset your password. Please click OK to login'.