



The McQuaig Institute®

NEW McQuaig Online Reference Guide®

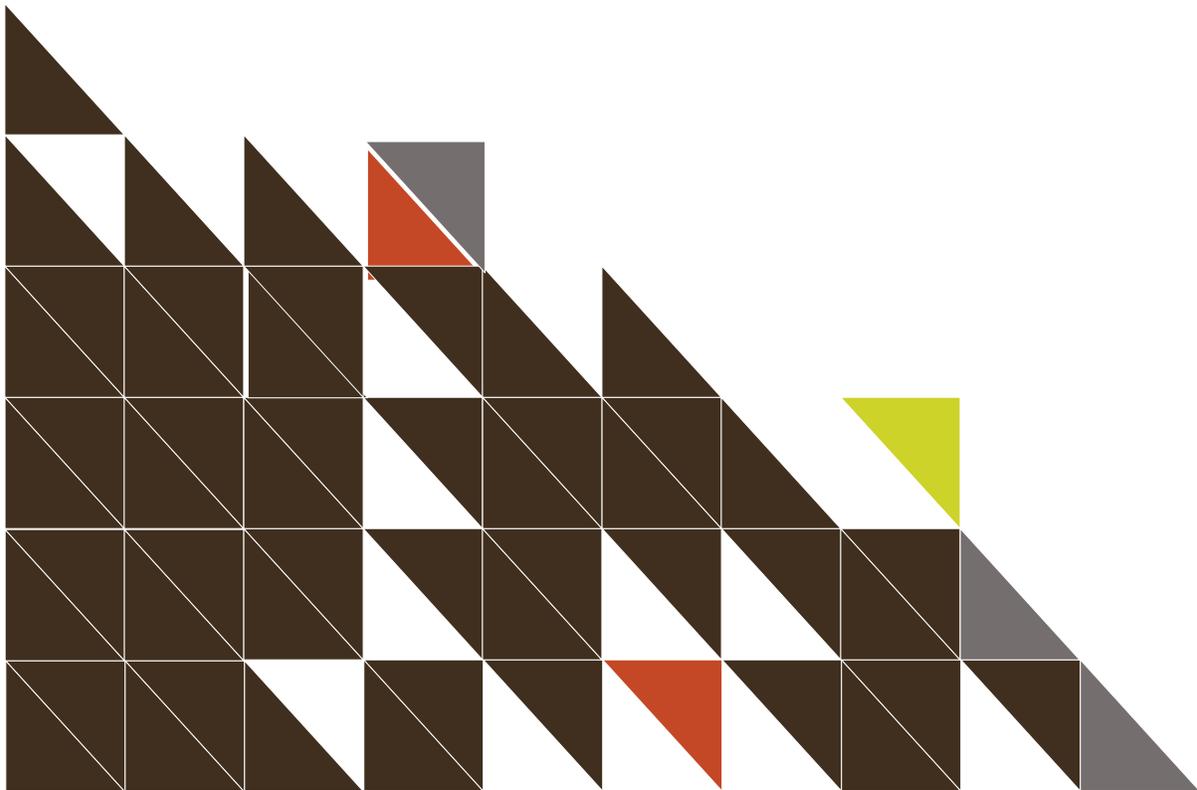




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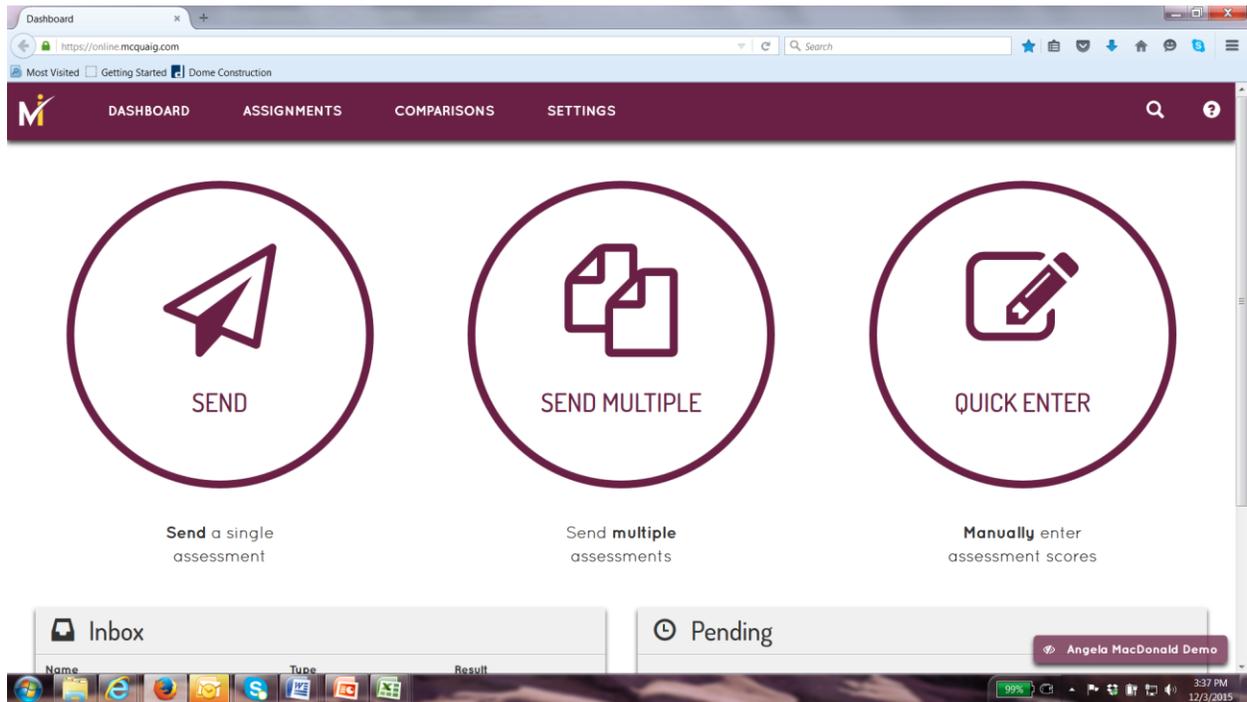
NEW McQuaig Online Reference Guide

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The New McQuaig Online Dashboard

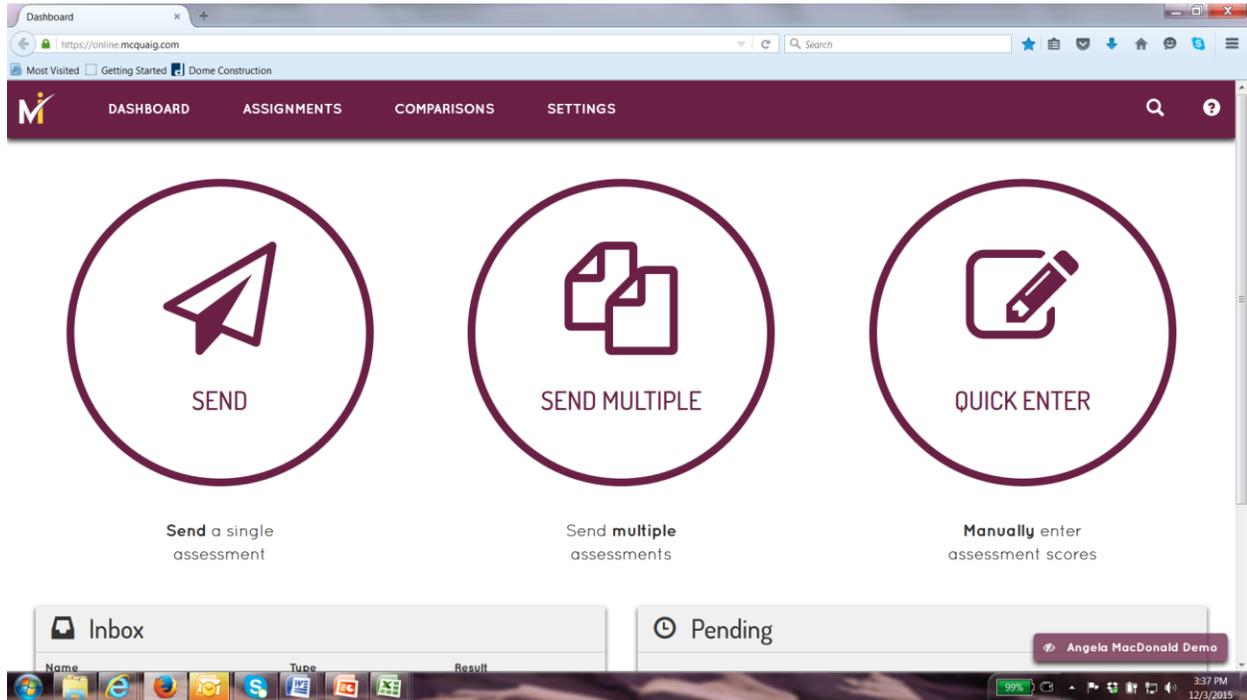


This is the Dashboard page of the site. You can select **Send** one survey, **Send Multiple** surveys, or **Quick Enter** by clicking on any one of these options.

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

The screenshot shows a web browser window with the URL <https://online.mcquaig.com/send/one>. The page title is "Send Assessment". The form contains the following fields:

- Assessment**: Word Survey
- Email**: Linda@sample.com
- First Name**: Linda
- Last Name**: Sample
- Gender**: Female
- Language**: English
- Expires In (days)**: 2
- Label**: (empty)
- Group**: (empty)

A user name "Angela MacDonald Demo" is displayed in the bottom right corner of the form area.

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]

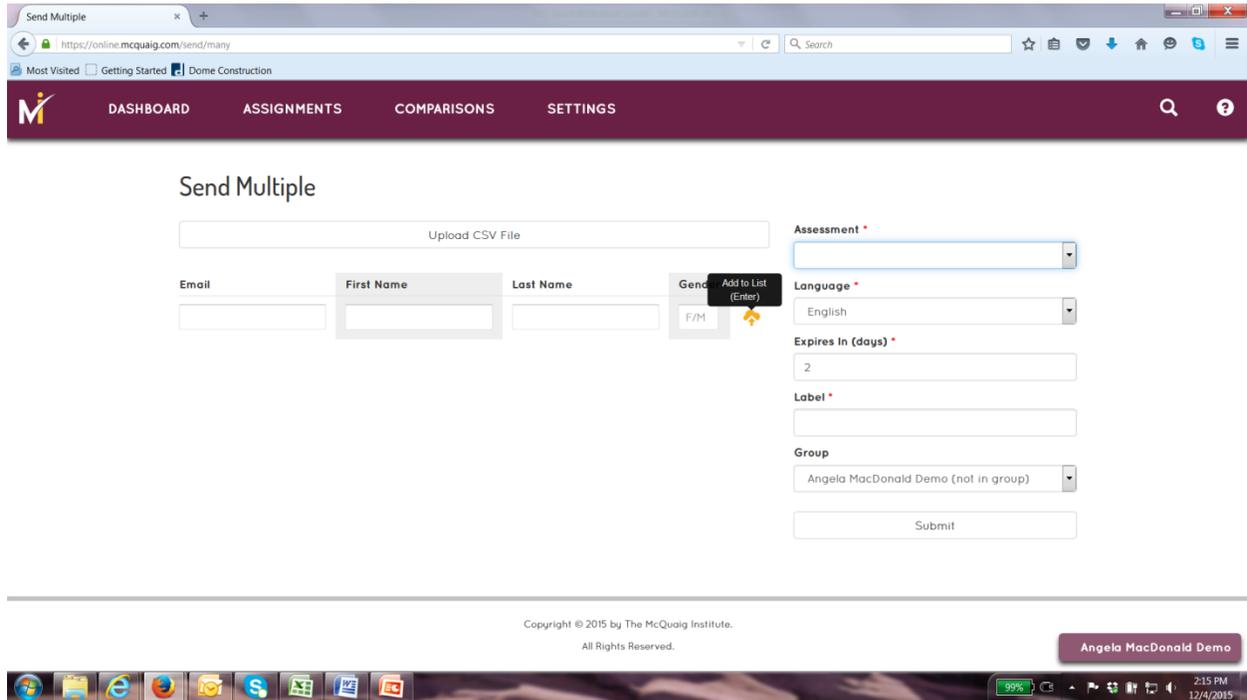
[Please click here to launch the survey]

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
McQuaig.com



Send Multiple Assessments



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.

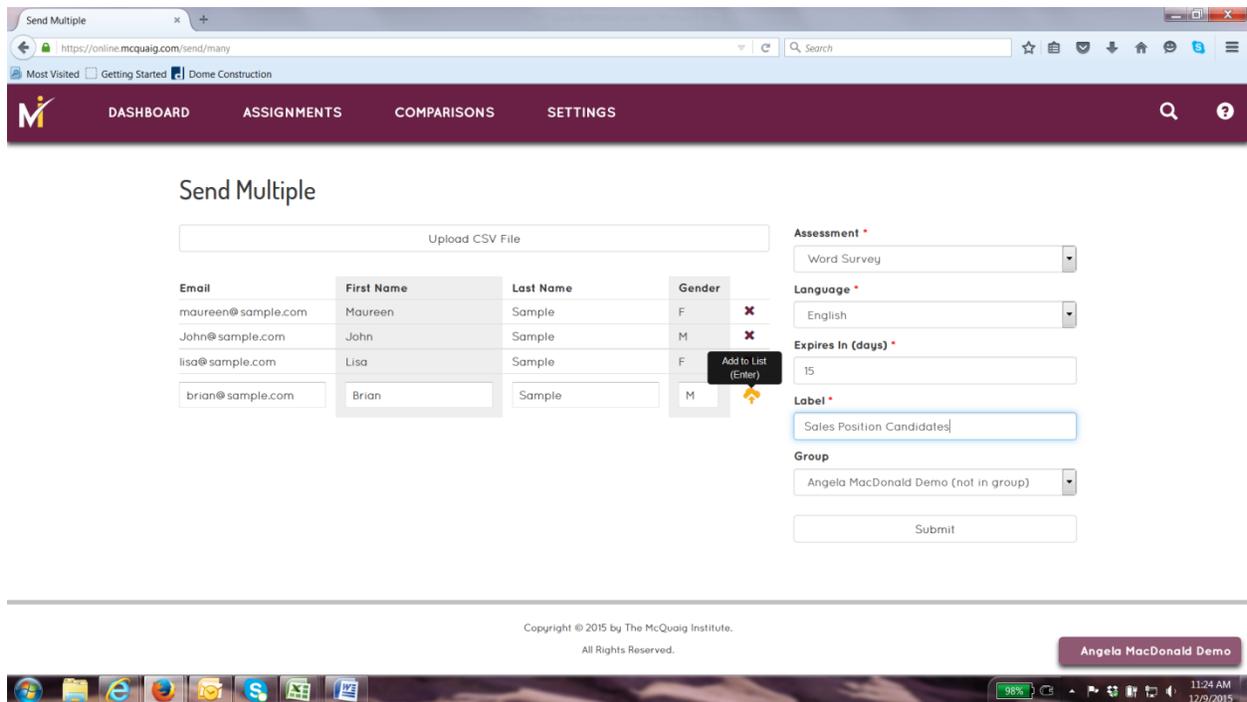
Entering multiple delegate's manually:

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



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:

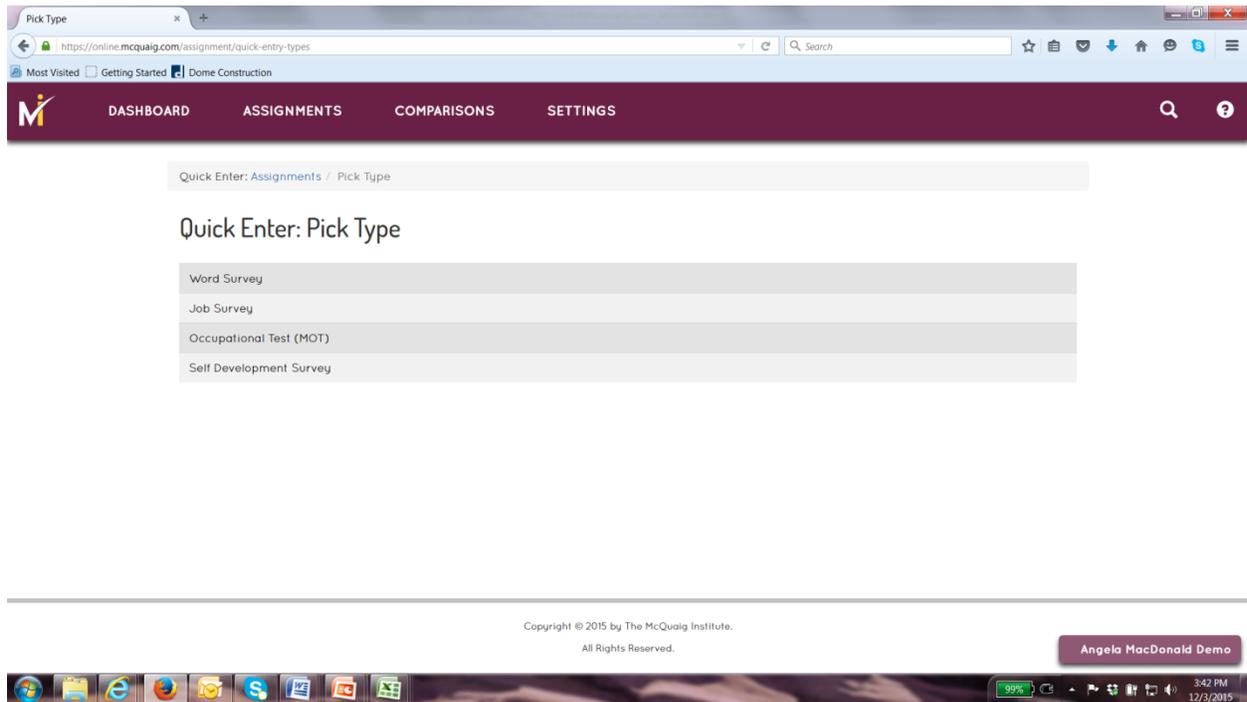
Our email service failed to delivery to the email address lisa@sample.com. The reason provided was "Bounced (4.0.0)".

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

Regards, The McQuaig Institute
McQuaig.com



Quick Enter Option



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

Quick Enter: Job Survey

Email

First Name *

Last Name *

Label

Language *

Duration (in seconds)

Job Title *

Real Scores *

DO SO RE CO

Submit

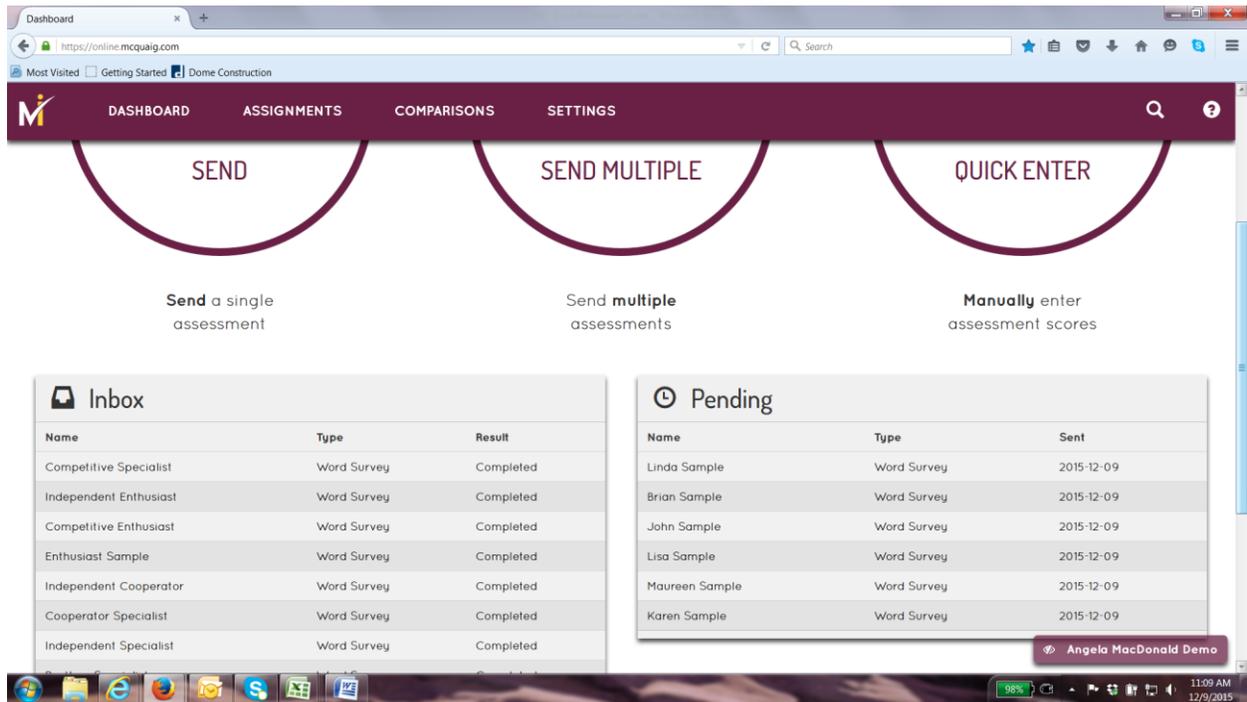
Angela MacDonald Demo

99% 3:43 PM 12/3/2015

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.



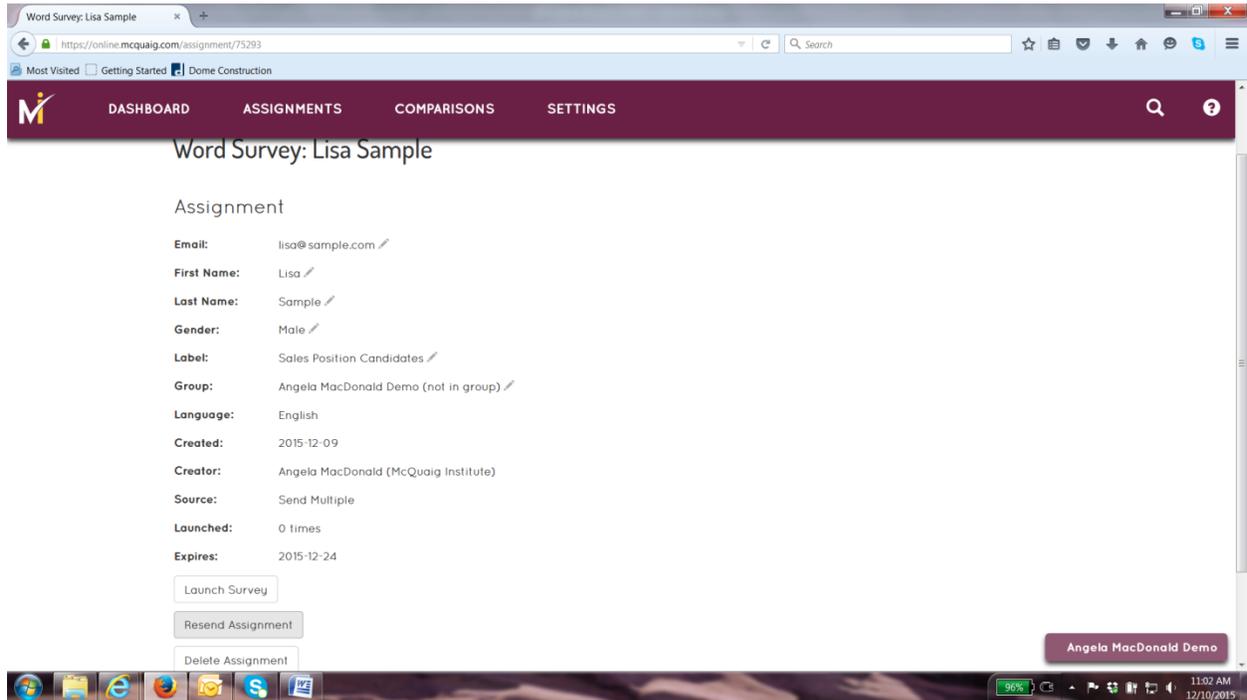
Inbox and Pending



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



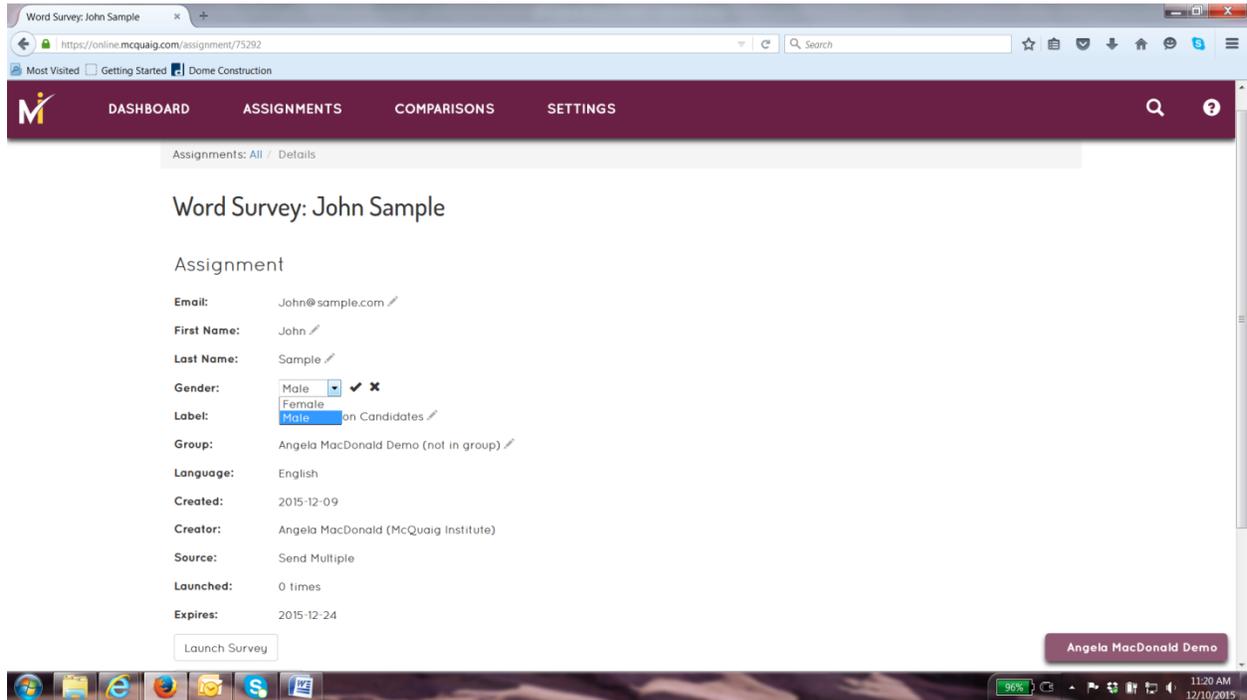
Resend or Delete a Survey



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

The screenshot shows the 'Assignments' page in a web browser. The page has a dark purple header with navigation links: DASHBOARD, ASSIGNMENTS, COMPARISONS, and SETTINGS. Below the header, the title 'Assignments' is displayed. A yellow bar contains a 'FILTER BY' dropdown menu. Below this, there are two buttons: 'Quick Enter Scores' and 'Transcribe from Paper'. The main content is a table with the following columns: First, Last, Email, Type, Sent, Status, Label, and Profile Type. The table contains 15 rows of data. A 'Angela MacDonald Demo' watermark is visible in the bottom right corner of the table area. The browser's taskbar at the bottom shows various application icons and the system clock indicating 11:26 AM on 12/9/2015.

First	Last	Email	Type	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		Cooperator

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

Assignments

FILTER BY

Name: Lisa Sample

Email: _____

Group: Anyj

Status: Anyj

Type: Anyj

Sent: From _____ To _____

Label: _____

Apply Reset

Quick Enter Scores Transcribe from Paper

First	Last	Email	Type	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	Angela MacDonald Demo

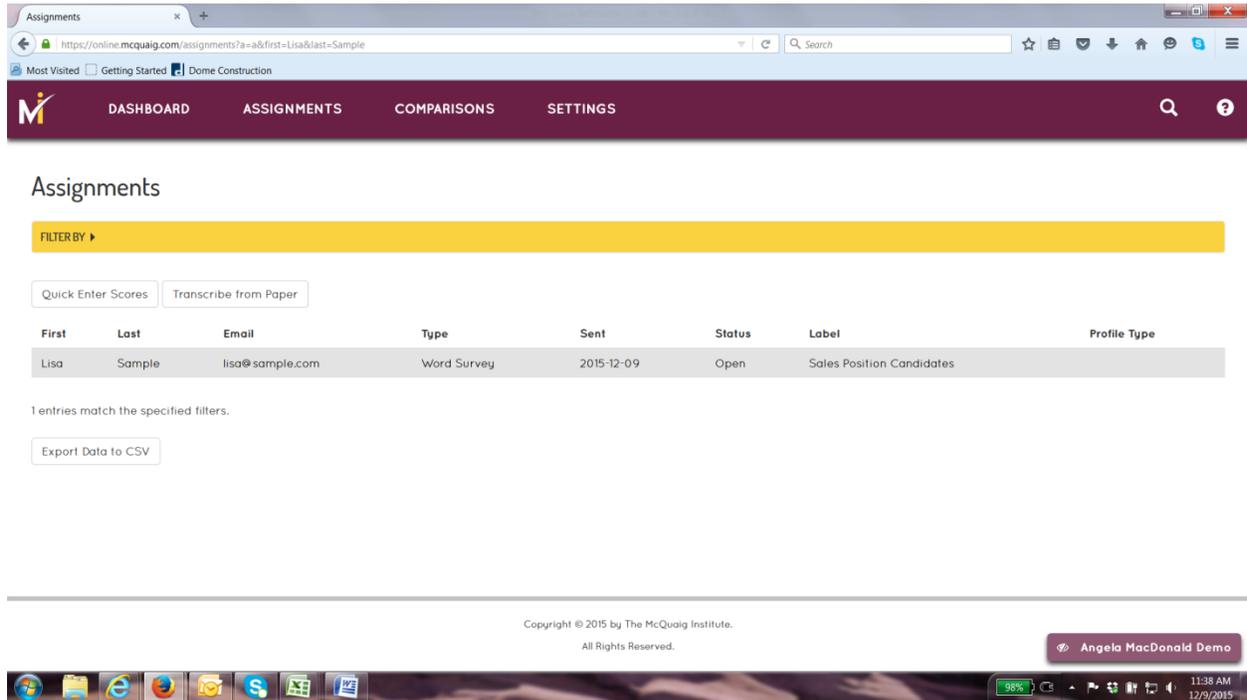
To search for an assessment that is not listed on the **Assignments** page, select **Filter By** and this screen will appear. Fill in some or all of the detailed information including **Name**, **Email**, **Group** (select group name), **Status** (**Open**, **Completed**, **Expired**, **Delivery Failed**), **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.



QUICK START

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Filter By

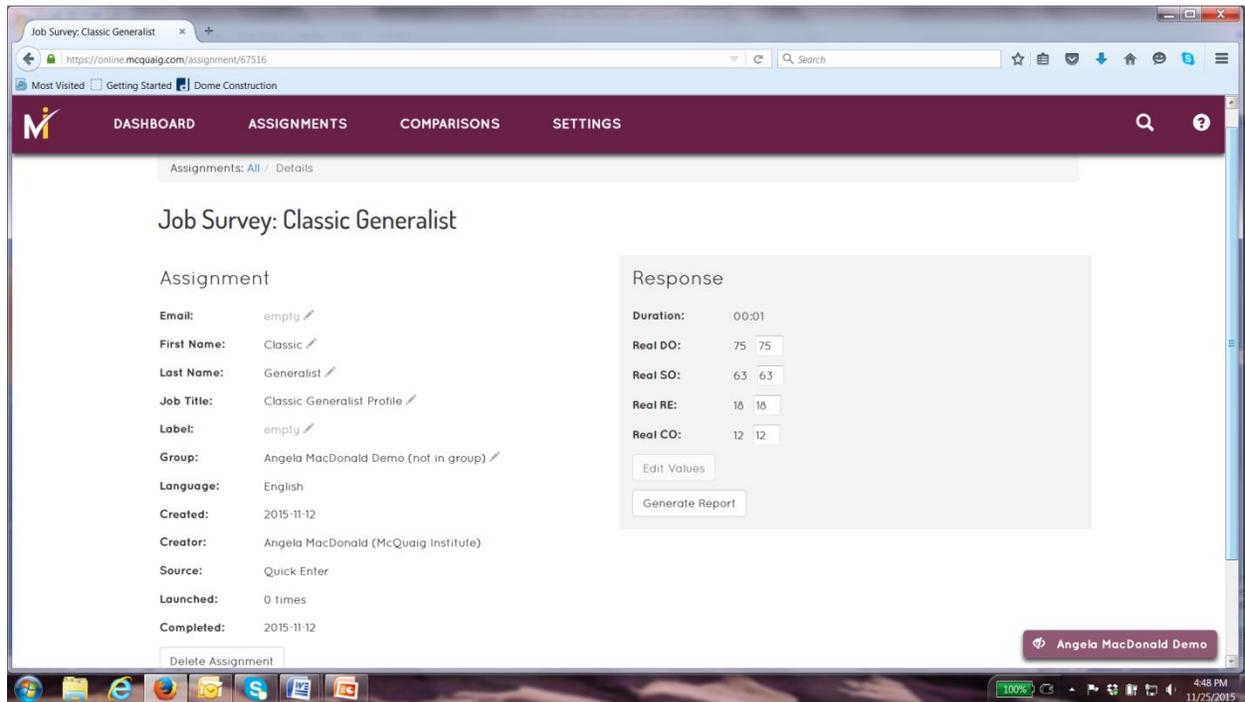


After you select **Apply**, this screen will appear with all related reports based on the information that was input in the previous screen.

You also have the option to export data to CSV.



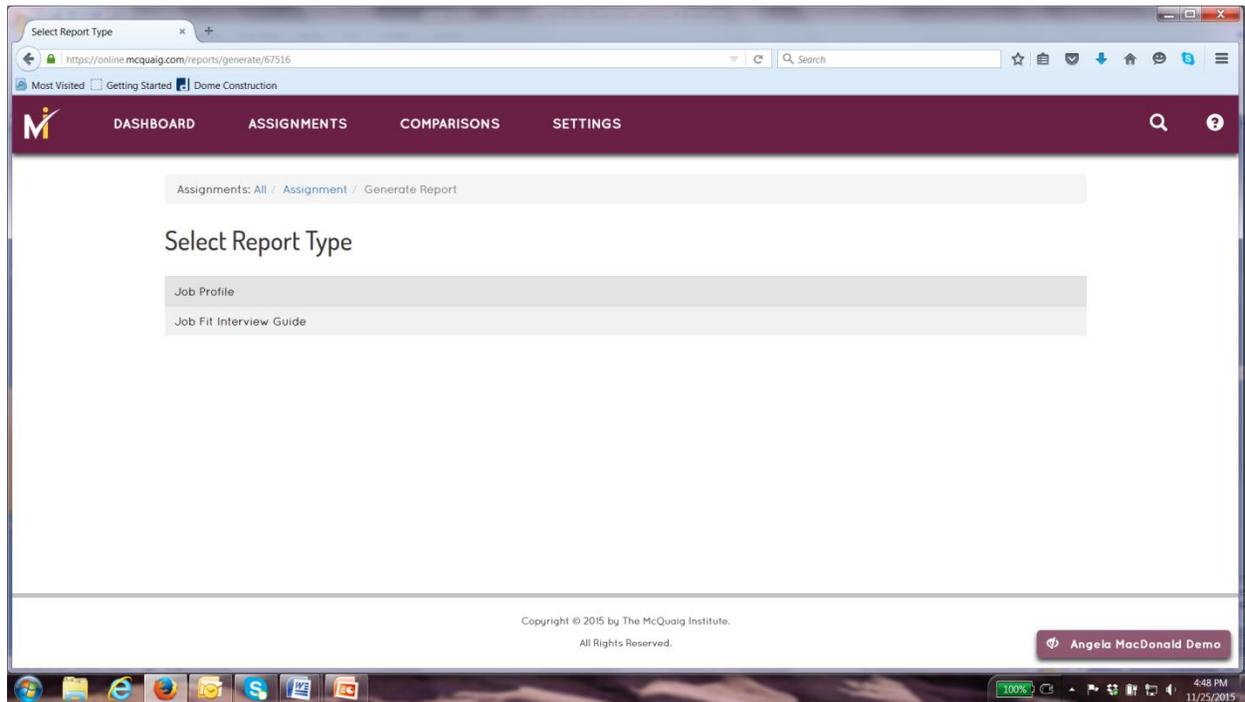
Generate Reports: Job Survey



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



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



Generate Report: Job Profile

Generate Report: Job Profile (Classic Generalist Profile)

Sections

- Table of Contents
- Graph
- Interpretation
- Leadership Profile
- Selling Style
- References

Interview Questions Type

Management Interview Questions

Word Profile

Email First Name Last Name Find

None Selected

Language

US English

Paper Size

Letter

Angela MacDonald Demo

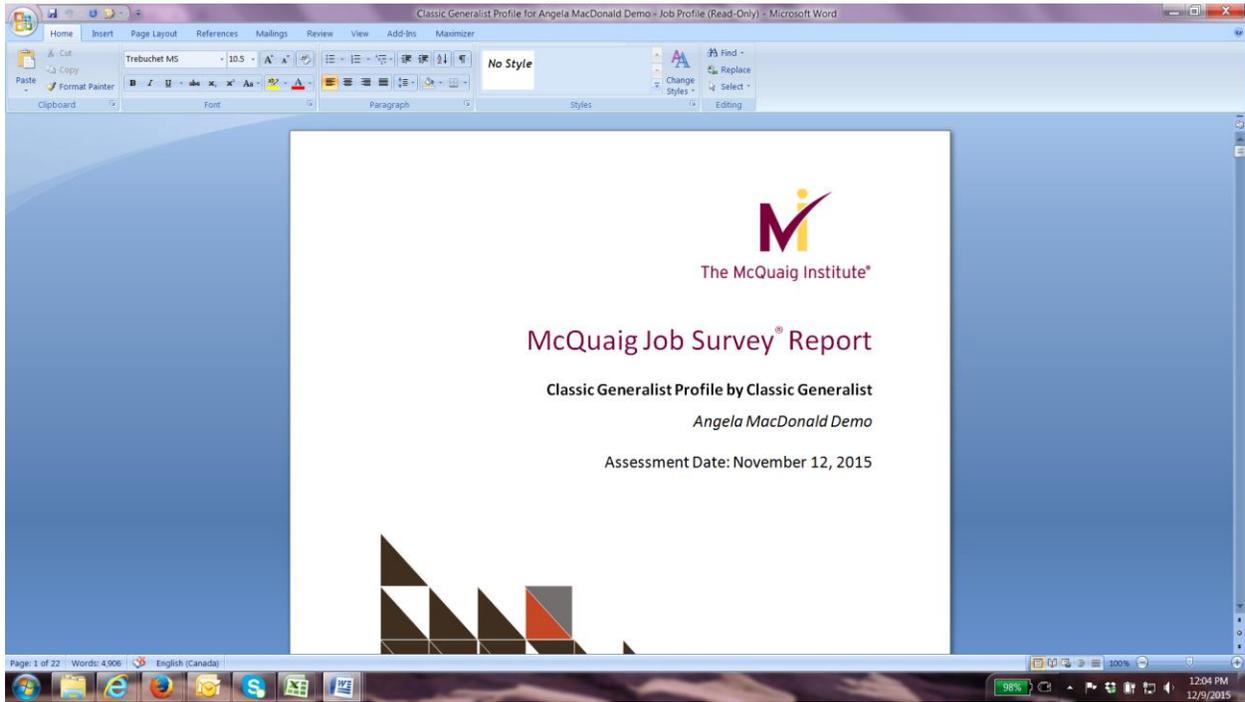
When you select **Job Profile**, this screen appears and you can select the sections of the report that you would like included along with the **Interview Questions Type**. You also have the option to include a candidate/employee **Word Survey** to compare to this **Job Profile** by entering the **Email/First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



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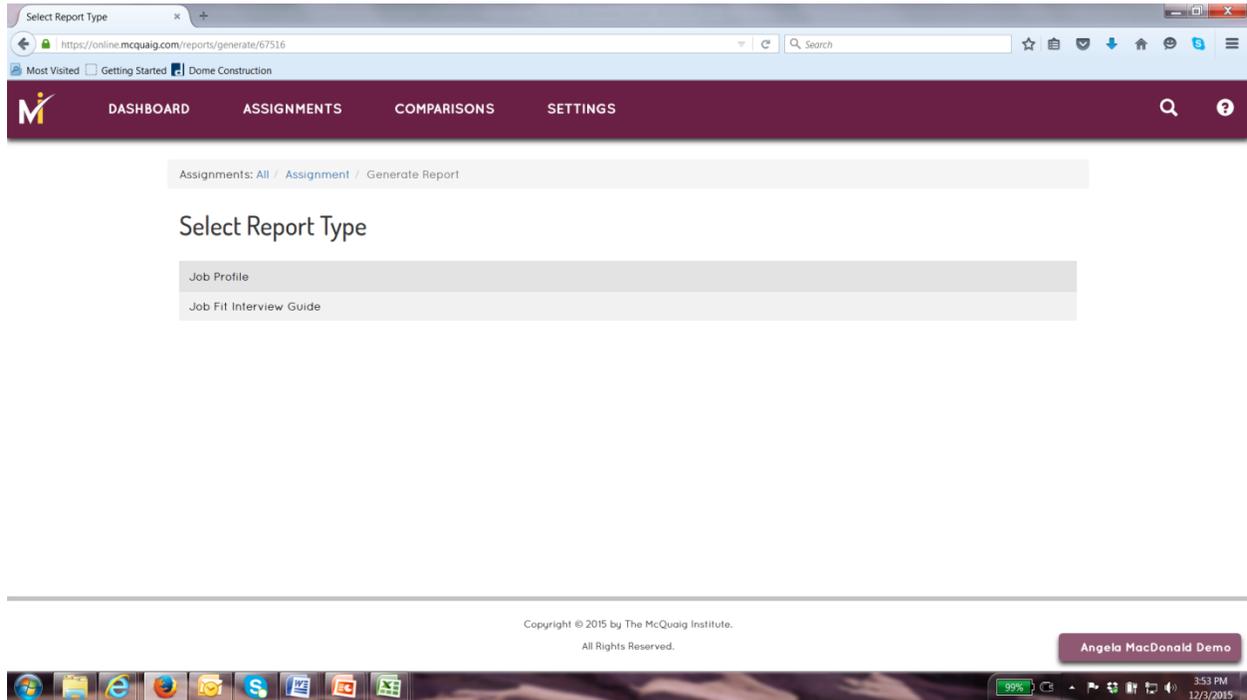
Generate Report: Job Profile



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



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

The screenshot shows a web browser window with the URL <https://online.mcquag.com/reports/generate/67516/2>. The page title is "Generate Report: Job Fit Interview Guide (Classic Generalist Profile)". The interface includes a navigation bar with "DASHBOARD", "ASSIGNMENTS", "COMPARISONS", and "SETTINGS". Below the navigation bar, there is a breadcrumb trail: "Assignments: All / Assignment / Generate Report". The main content area contains the following fields and options:

- Interview Questions Type:** A dropdown menu set to "Management Interview Questions".
- Word Profile:** A search area with "Email" input, a text field containing "angela", another text field containing "macdonald", and a "Find" button. Below this, there are two radio button options: "None Selected" and "Angela MacDonald (2015-11-06)".
- Language:** A dropdown menu set to "US English".
- Paper Size:** A dropdown menu set to "Letter".
- A "Generate" button at the bottom of the form.

At the bottom of the page, there is a copyright notice: "Copyright © 2015 by The McQuaig Institute. All Rights Reserved." and a "Angela MacDonald Demo" button. The Windows taskbar at the bottom shows the system tray with a battery level of 99%, the time 2:56 PM, and the date 12/4/2015.

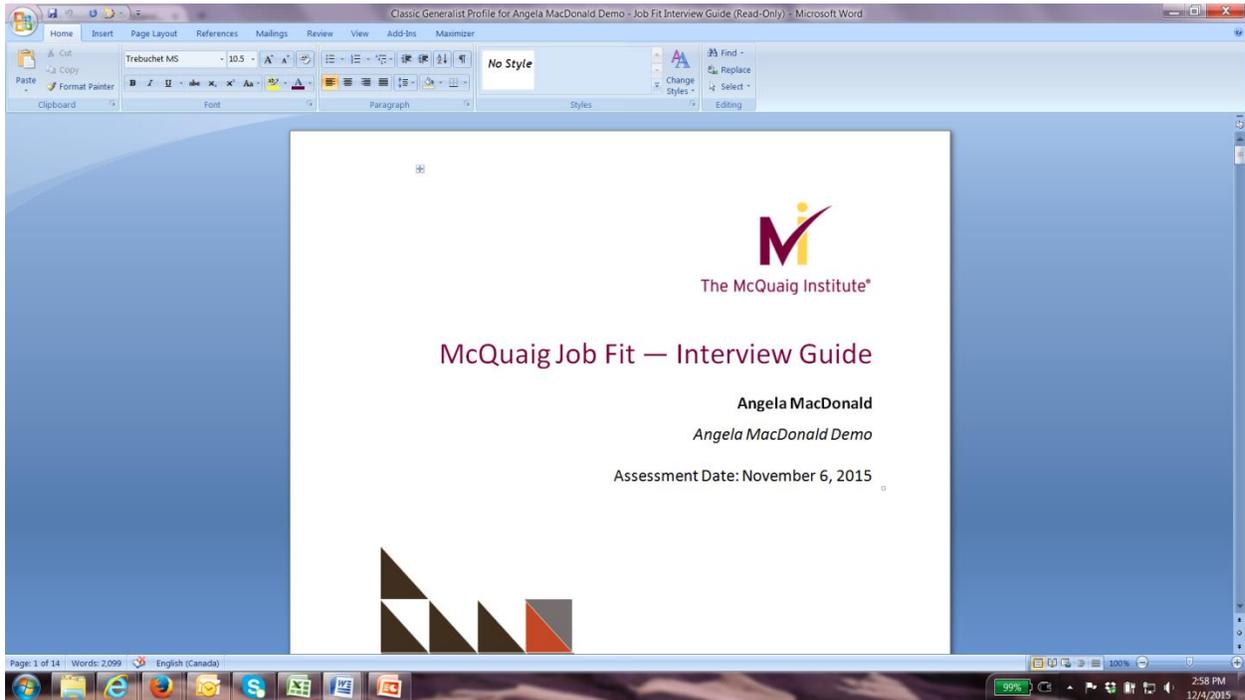
This screen appears when you select **Job Fit Interview Guide**. You can select the **Interview Questions Type**, the name of the person that you would like to compare their **Word Survey** results to this benchmark, and select **Generate**. This will generate the **Job Fit Interview Guide** (and the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



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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:

The screenshot displays the 'Word Survey: Classic Specialist' assignment details page. The page is divided into two main sections: 'Assignment' and 'Response'.

Assignment Details:

- Email: empty
- First Name: Classic
- Last Name: Specialist
- Gender: Female
- Label: empty
- Group: Angela MacDonald Demo (not in group)
- Language: English
- Created: 2015-11-12
- Creator: Angela MacDonald (McQuaig Institute)
- Source: Quick Enter
- Launched: 0 times
- Completed: 2015-11-12

Response Details:

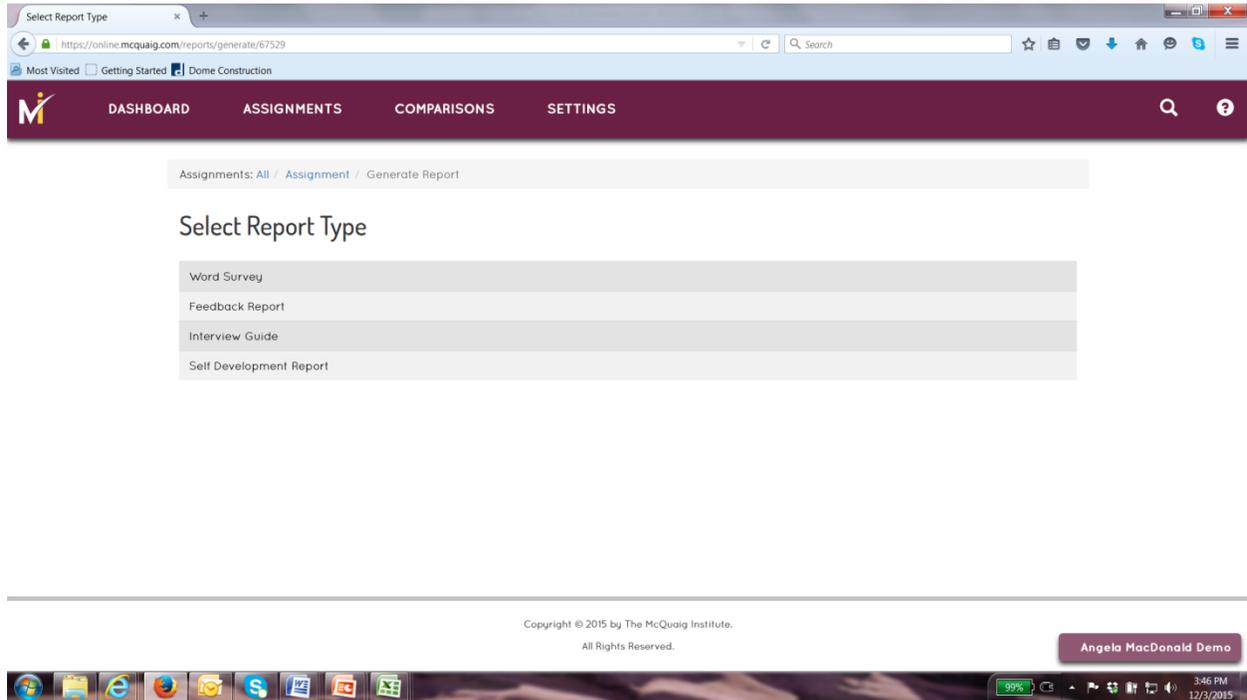
- Profile Type: Specialist
- Duration: 00:01
- Situational DO: 21
- Situational SO: 18
- Situational RE: 61
- Situational CO: 68
- Real DO: 16
- Real SO: 21
- Real RE: 63
- Real CO: 68

A 'Generate Report' button is located at the bottom of the 'Response' section. A 'Delete Assignment' button is located at the bottom of the 'Assignment' section. The user's name 'Angela MacDonald Demo' is visible in the bottom right corner of the page.

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**.



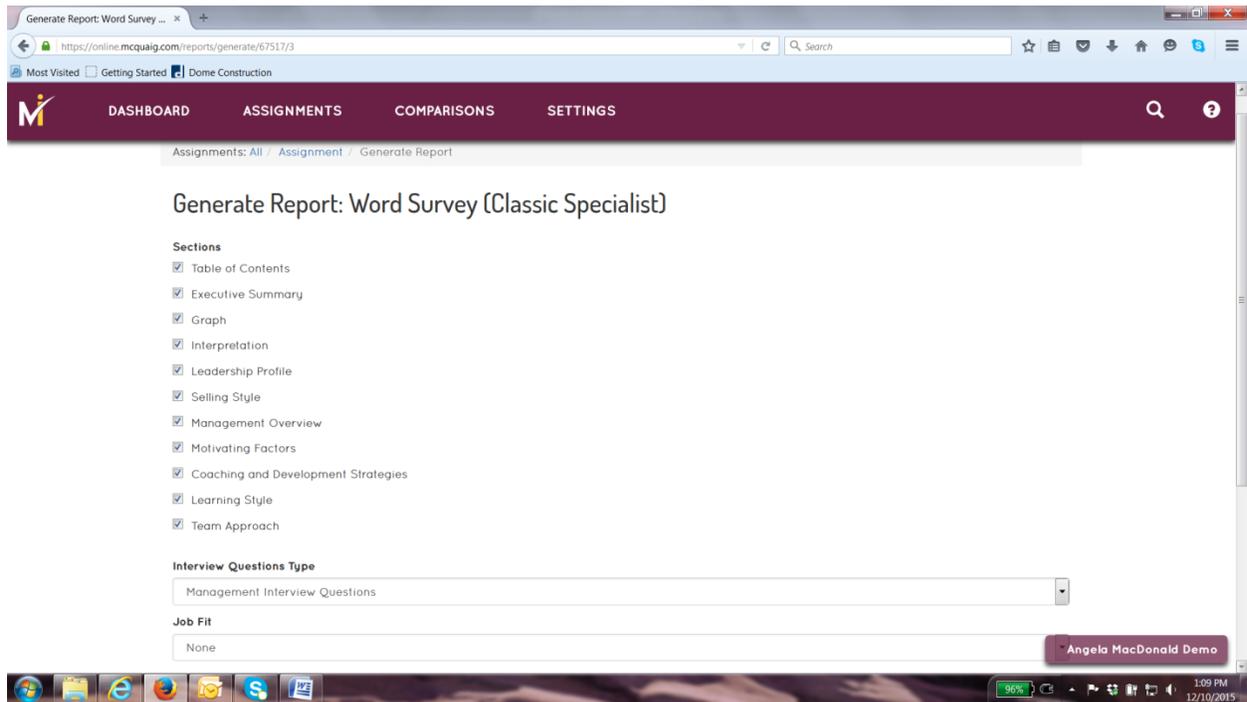
Generate Reports: Select Report Type



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**.



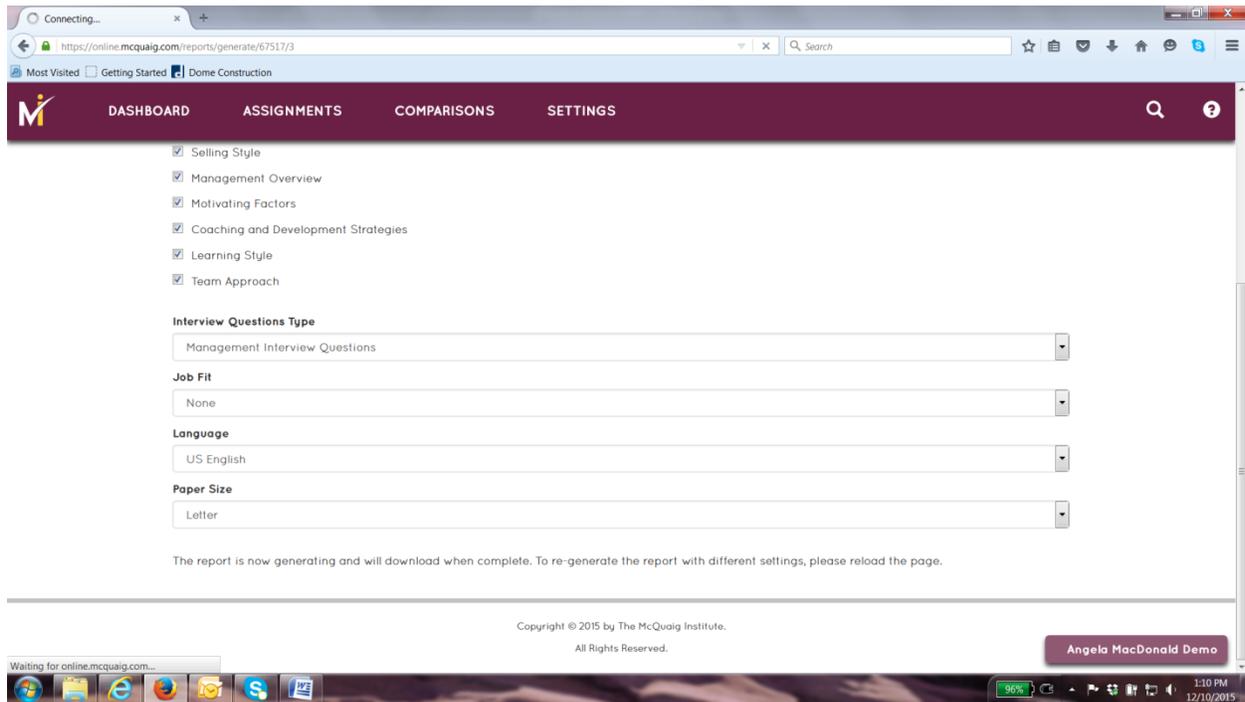
Generate Reports: Word Survey



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



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.

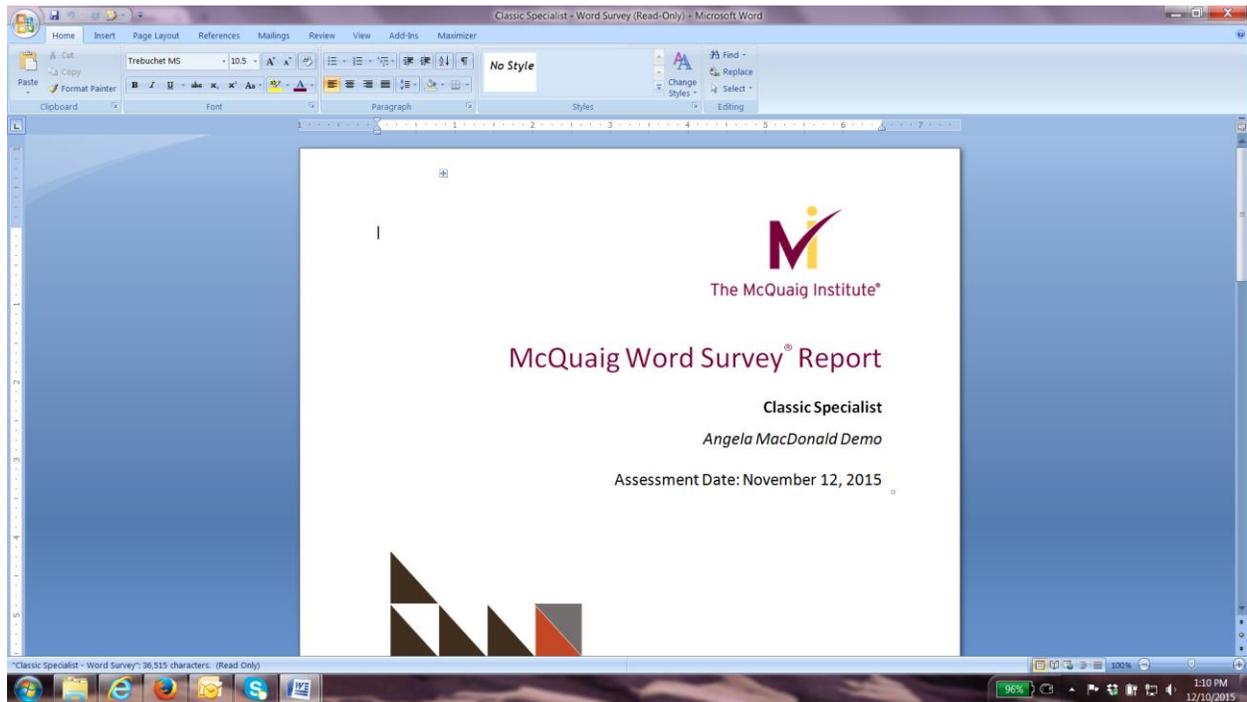
Once the report is ready, it will show as a download in the bottom left corner – click on it and it will open.



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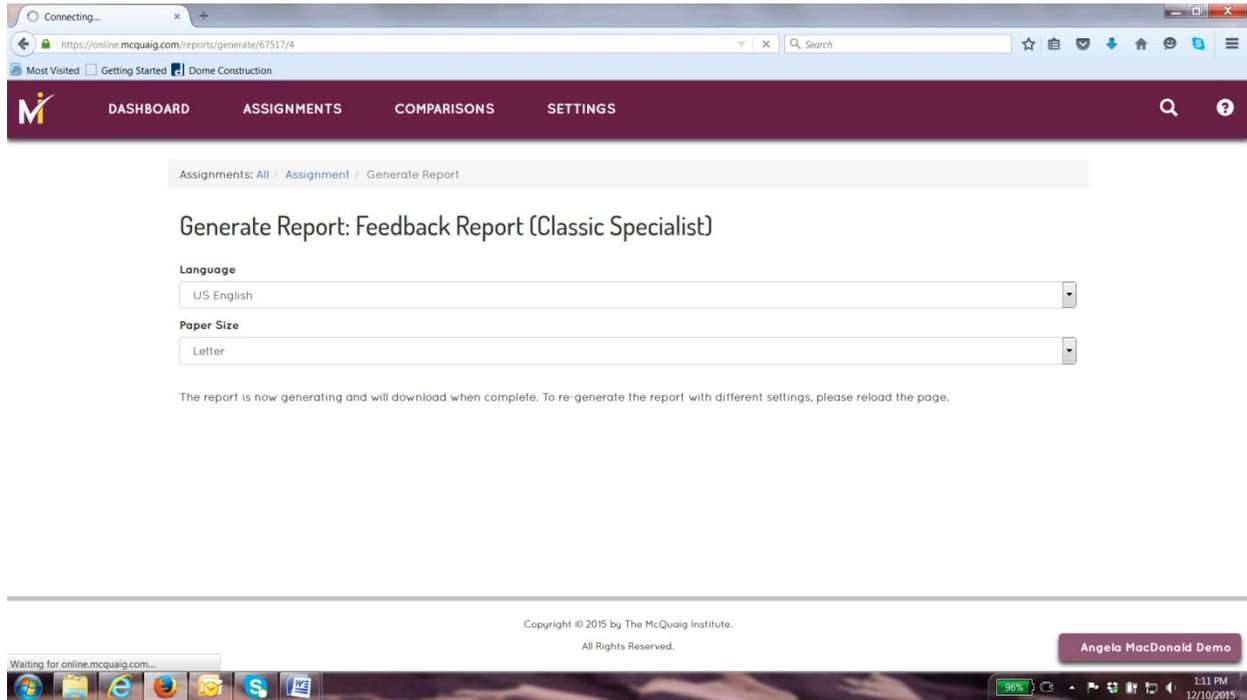
Report Available



The report is now available as a Word Document.



Generate Reports: Feedback Report

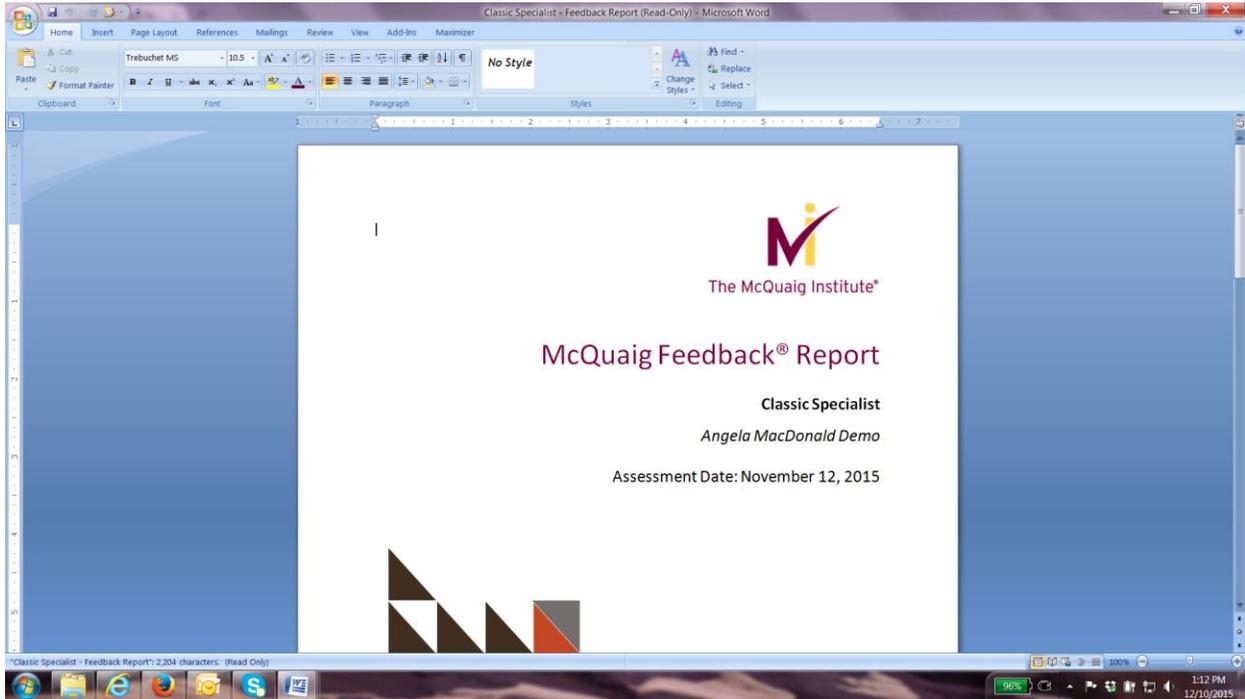


The **Feedback Report** is a brief summary of the candidate/employee profile and a copy which you can give to them. Select **Feedback Report** and **Generate** to produce this report as a Word Document.



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Generate Reports: Feedback Report



The report will be opened in a Word Document.



Generate Reports: Interview Guide

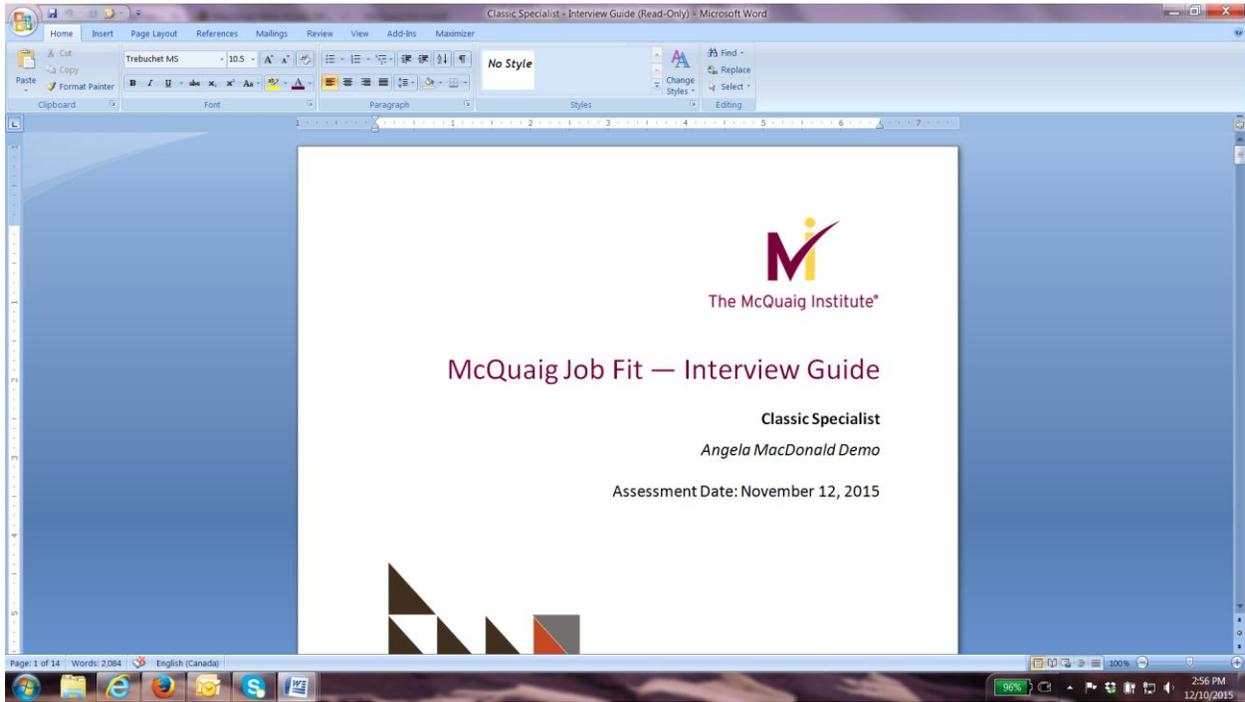
The **Interview Guide** provides details about the candidate along with interview questions. Select **Interview Guide** and this screen appears for you to select **Interview Questions Type**, **Job Profile**, and **Language**. Then select **Generate** to produce the report as a Word Document.



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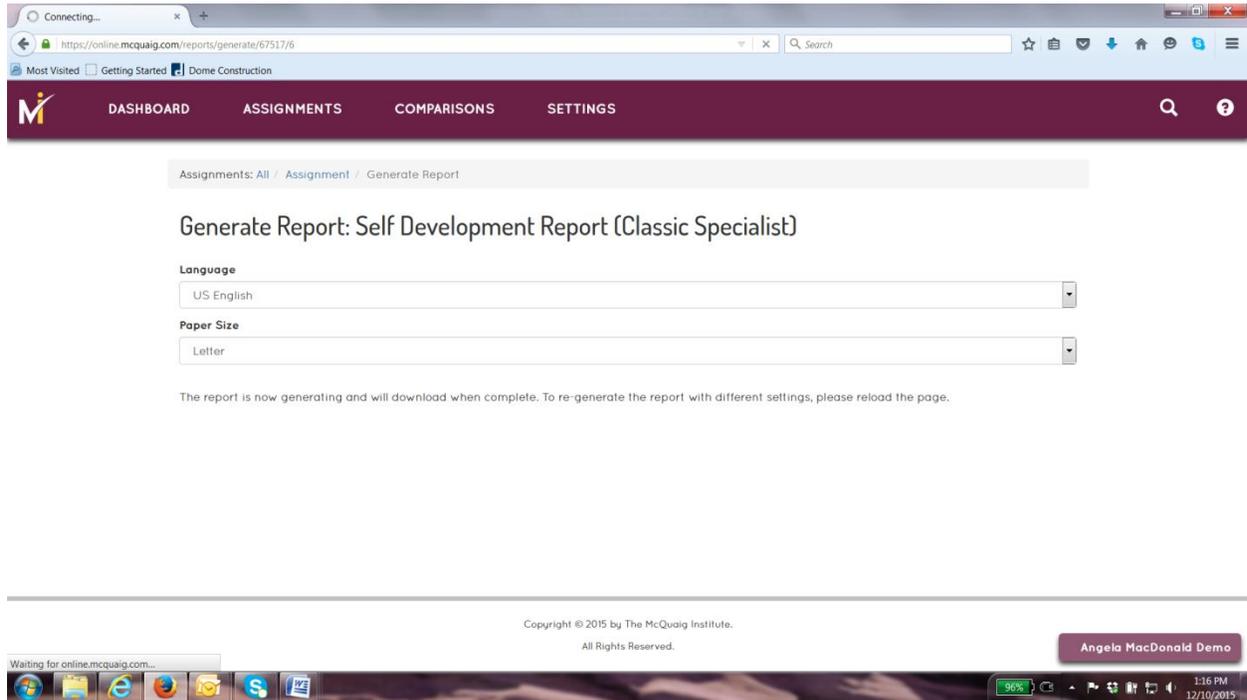
Generate Report: Interview Guide:



The report will be opened in a Word Document.



Generate Report: Self Development Survey

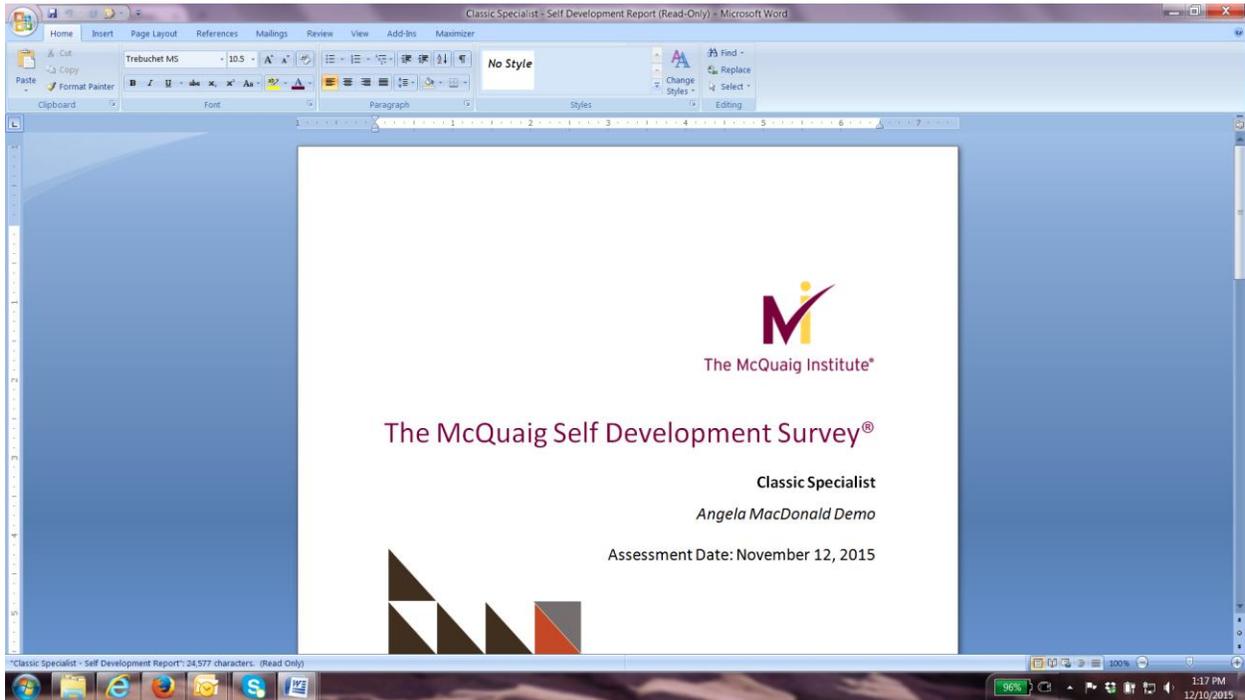


The **Self Development Report** provides coaching and direction for the candidate on each trait, identifying their strengths and areas for development. Select **Self Development Report** and **Generate** to produce this report as a Word Document.



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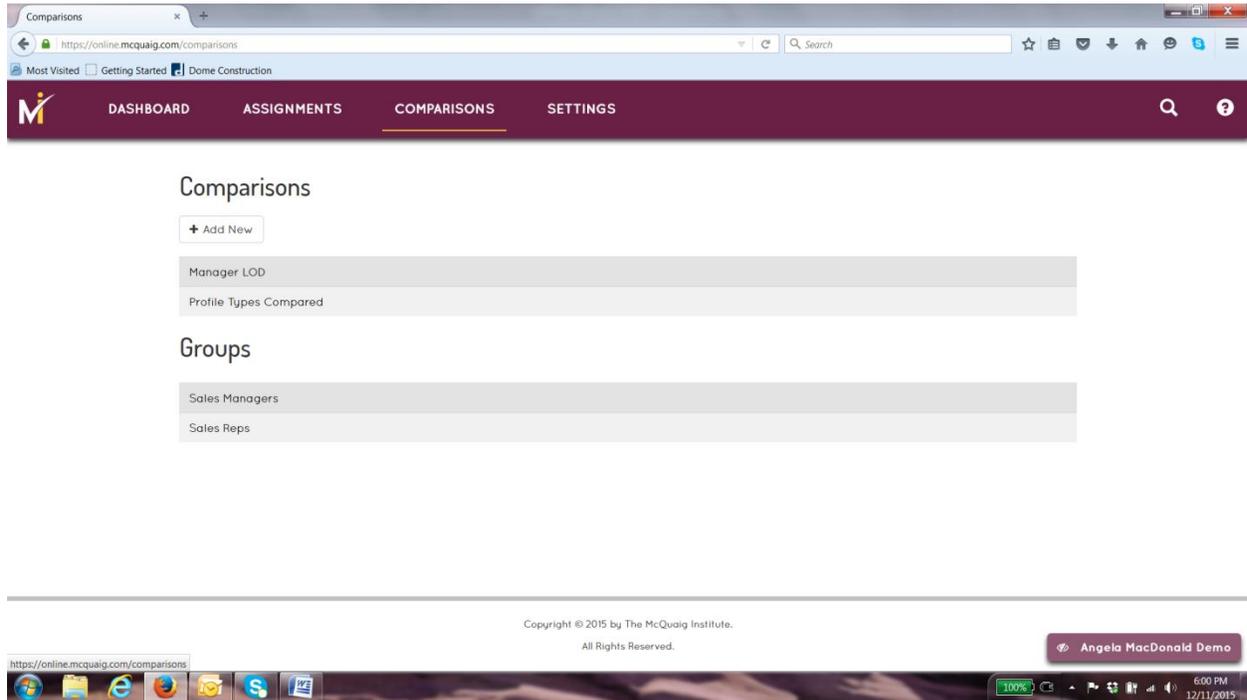
Generate Report: Self Development Survey



The report will be opened in a Word Document.



Comparisons

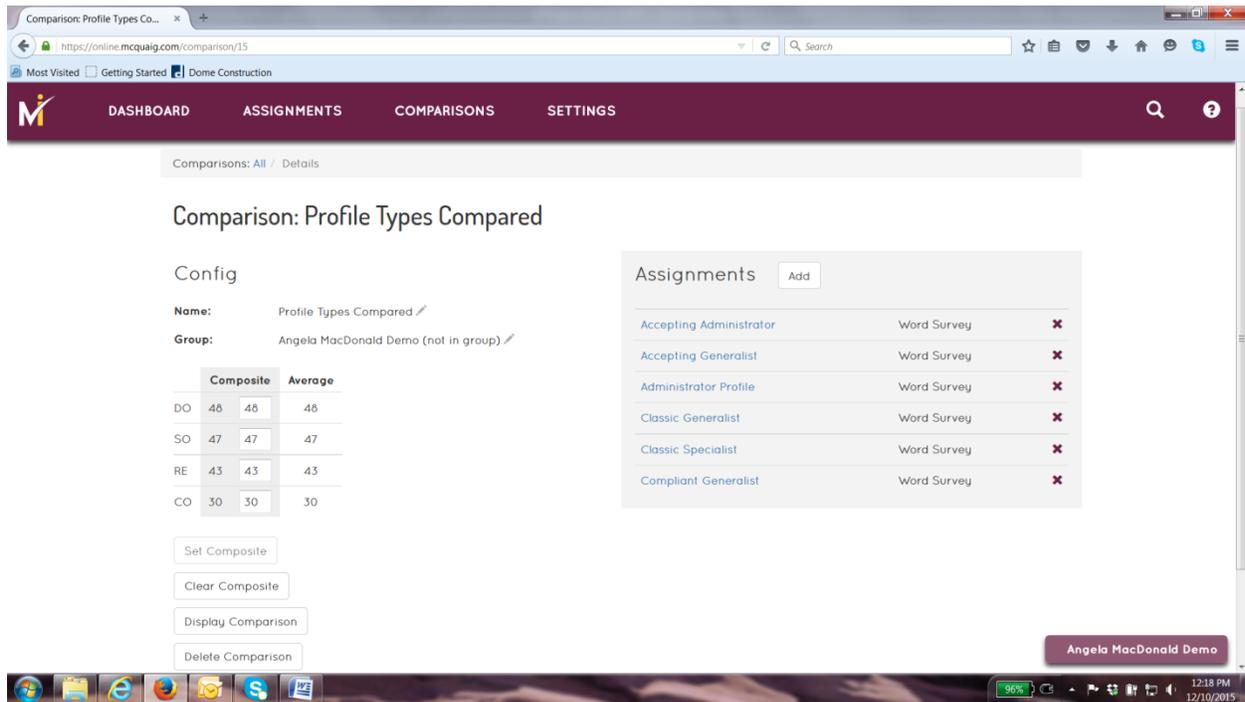


You can create **Comparison** reports with the titles created under **Comparisons**.

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.



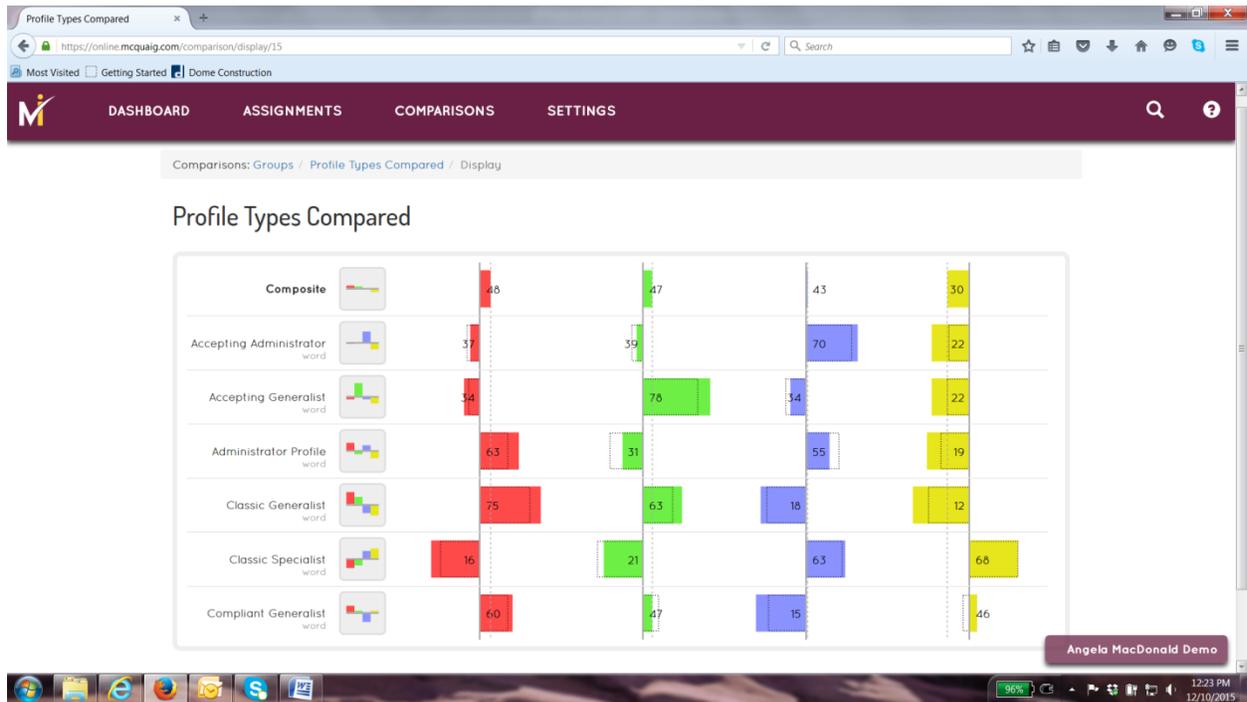
Comparisons



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



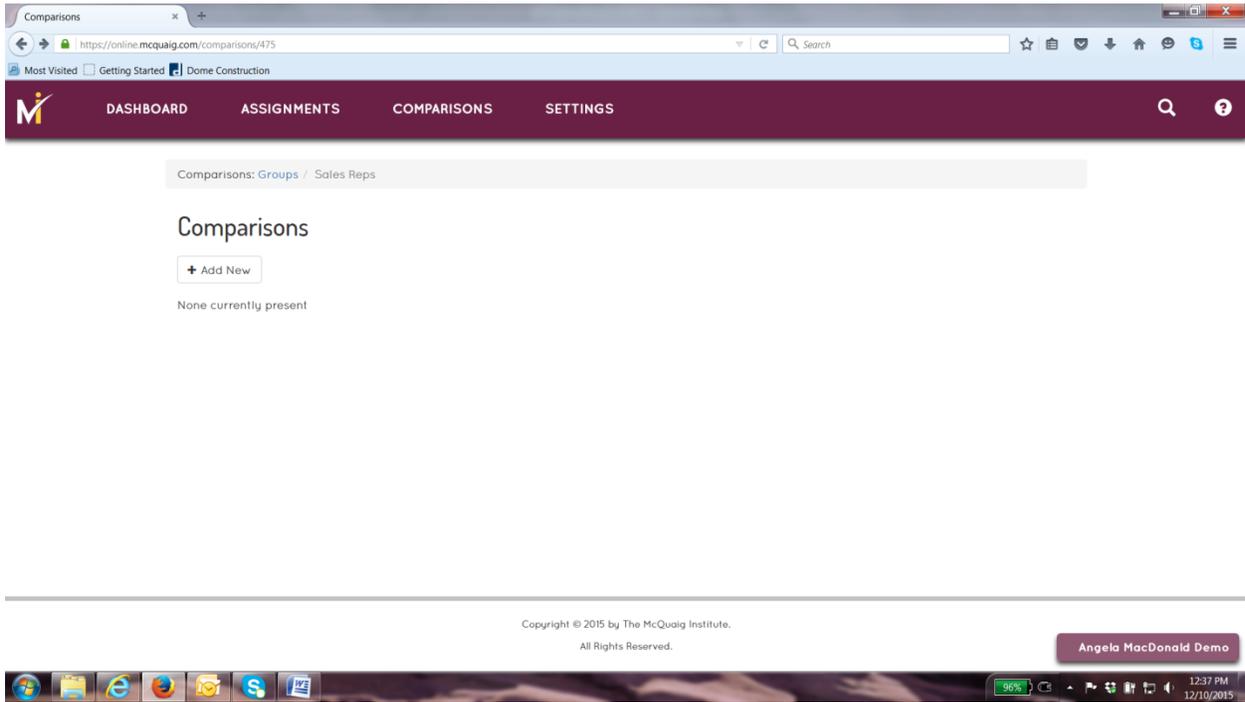
When you select **Display Comparison** you will see this composite graph. The top row is the **Composite** of the assessment results of each candidate/employee/report and each trait. Below that includes the scores for each candidate/employee/report that was included in this **Comparison**.



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Groups

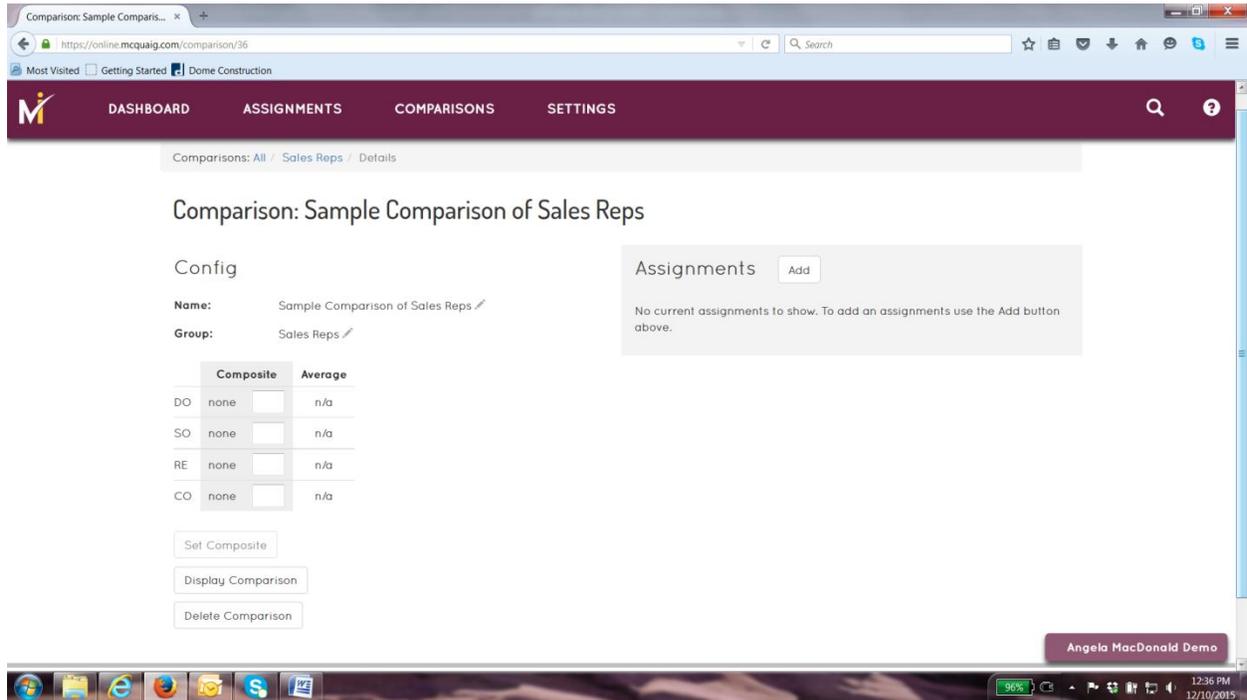


When you select the **Group [Sales Reps]** from the Comparisons page it will present this screen and allow you to **+Add New** comparisons.

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



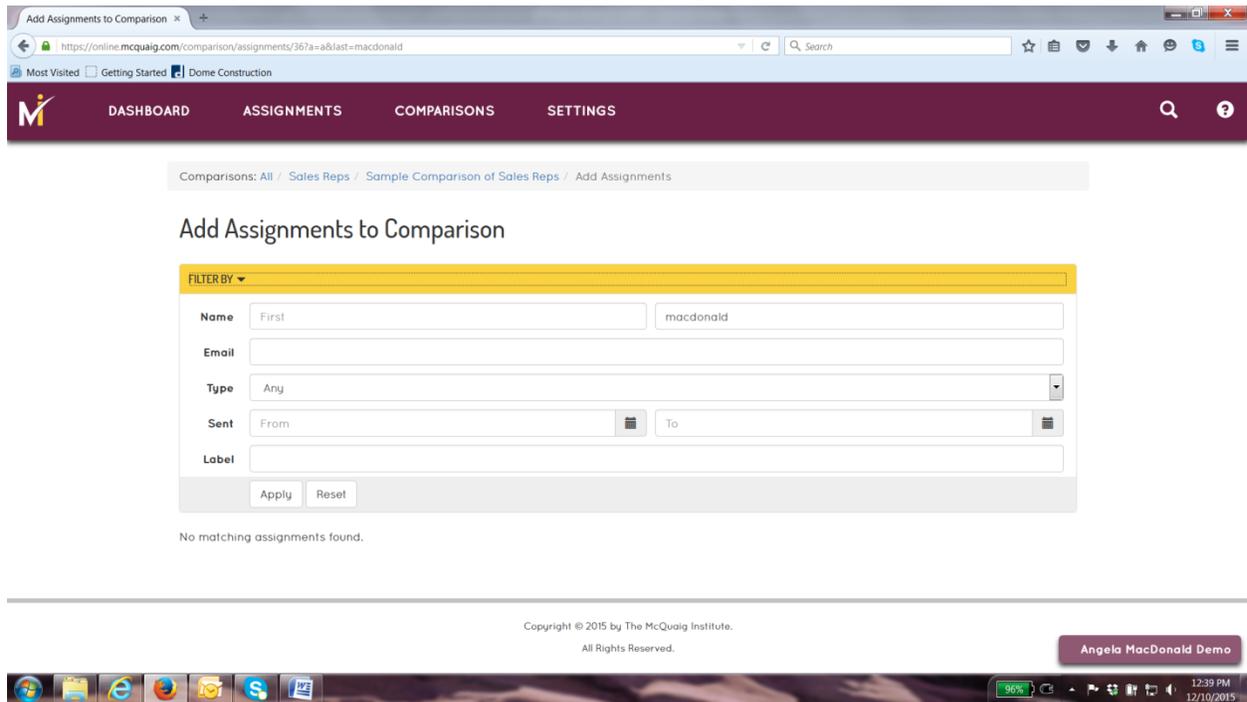
Groups



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

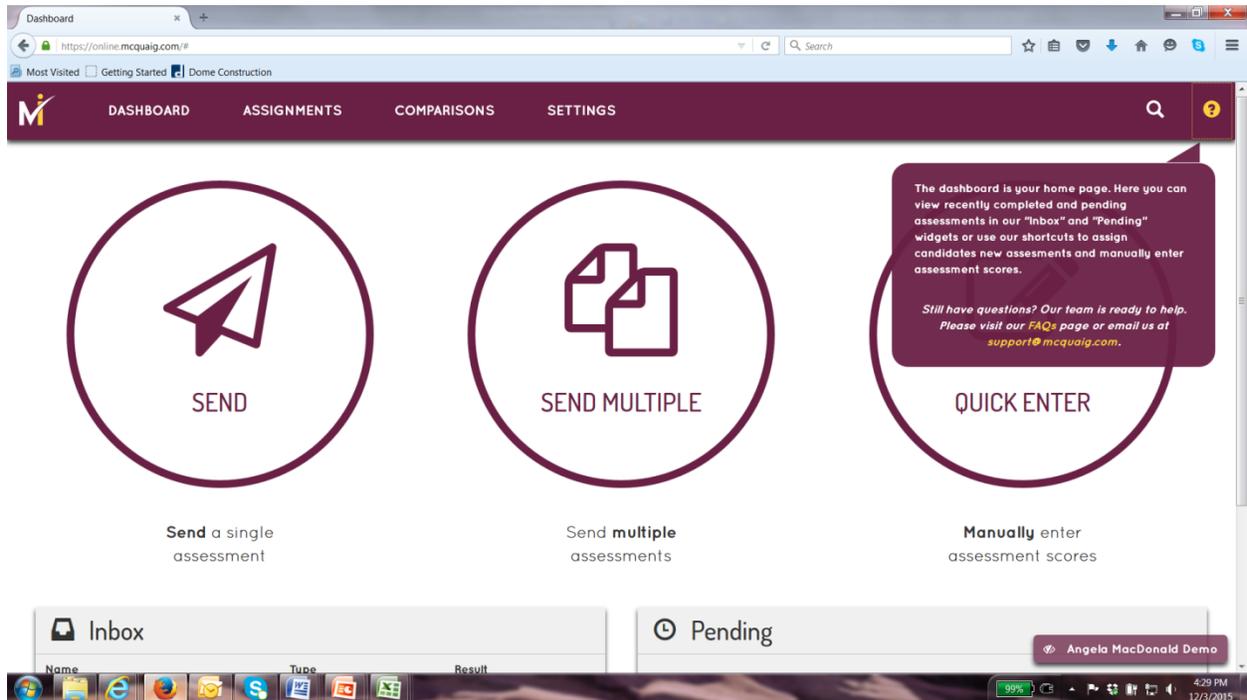


When you select **Add** under **Assignments** on the previous screen, the **Filter By** screen appears so you can search for the reports you want to compare. Enter the information here and select **Apply**.

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**.



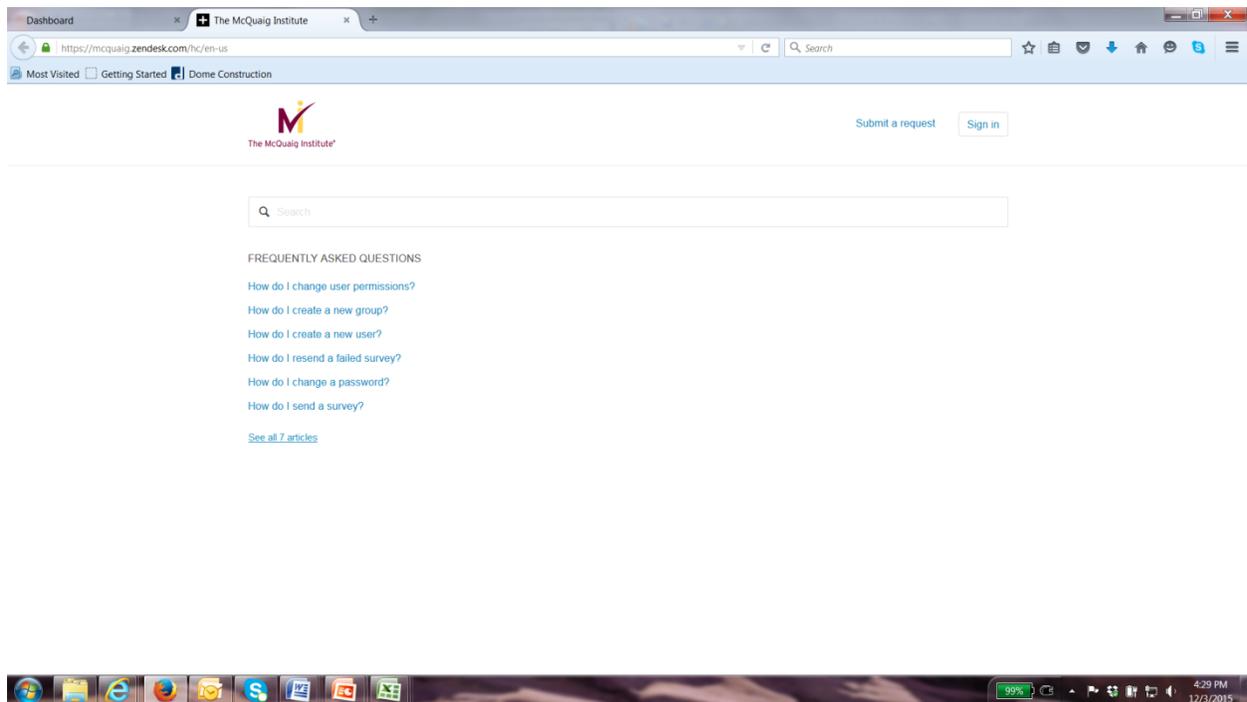
Frequently Asked Questions



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 info@holstgroup.co.uk



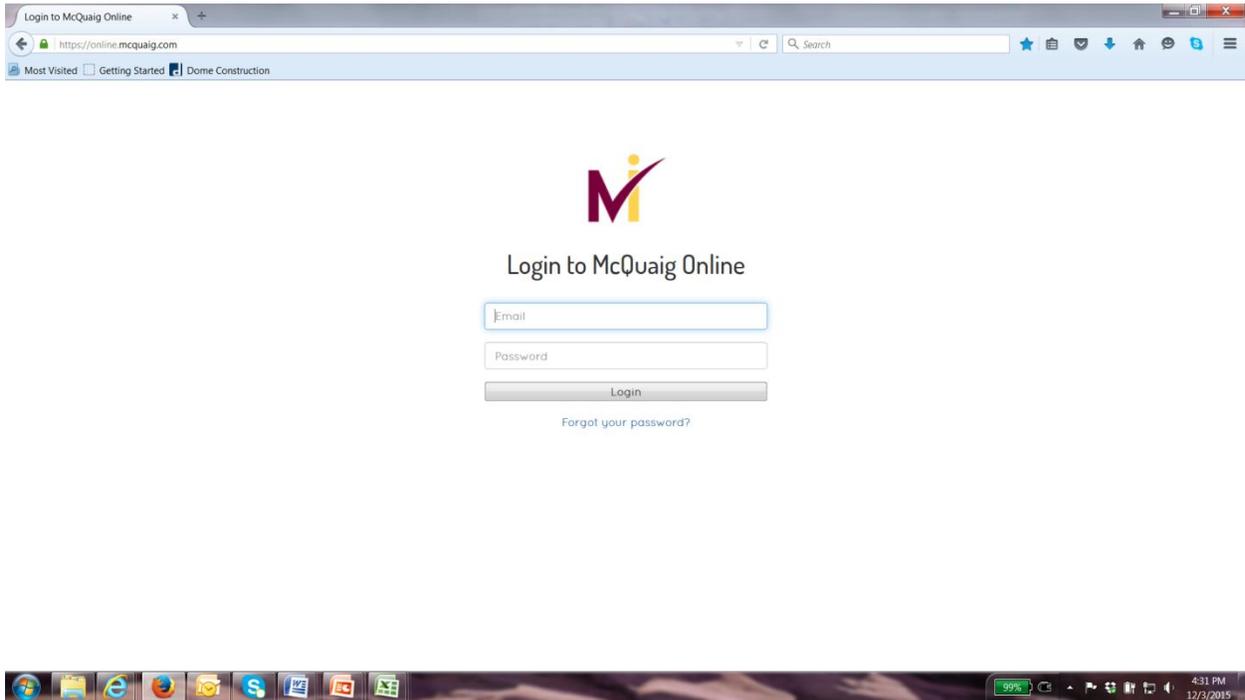
Frequently Asked Questions



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 info@holstgroup.co.uk.



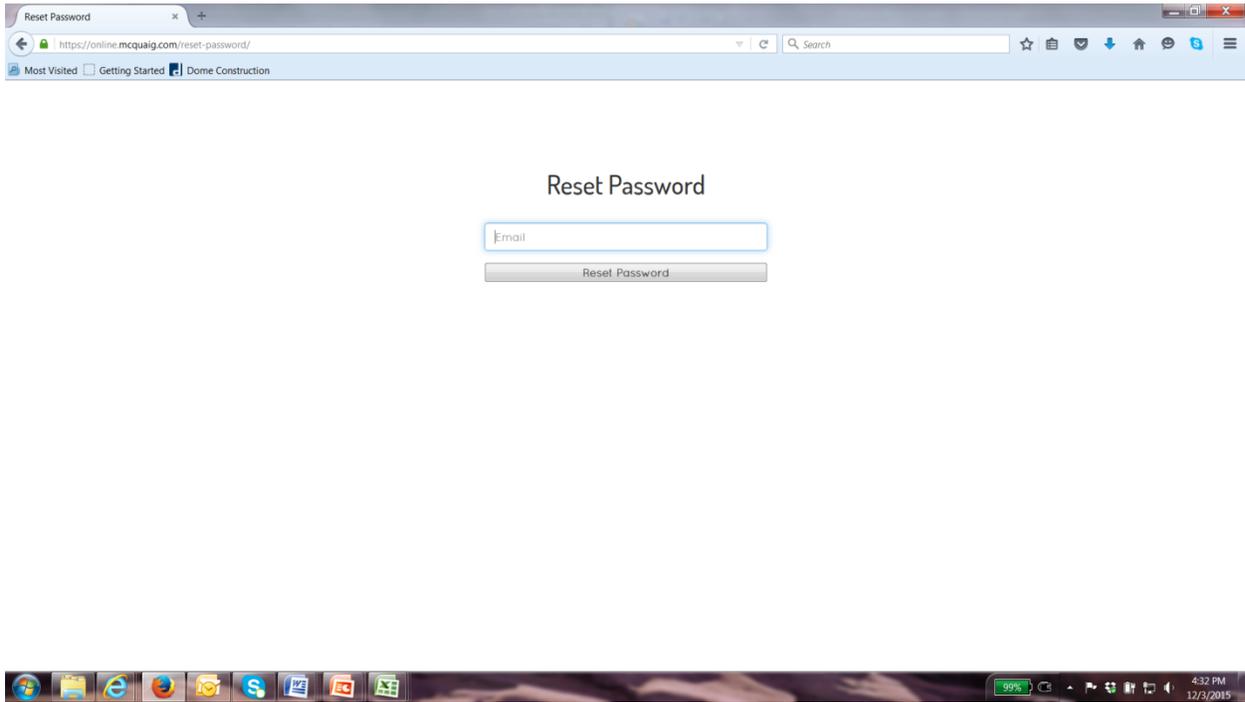
Forgot Password



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



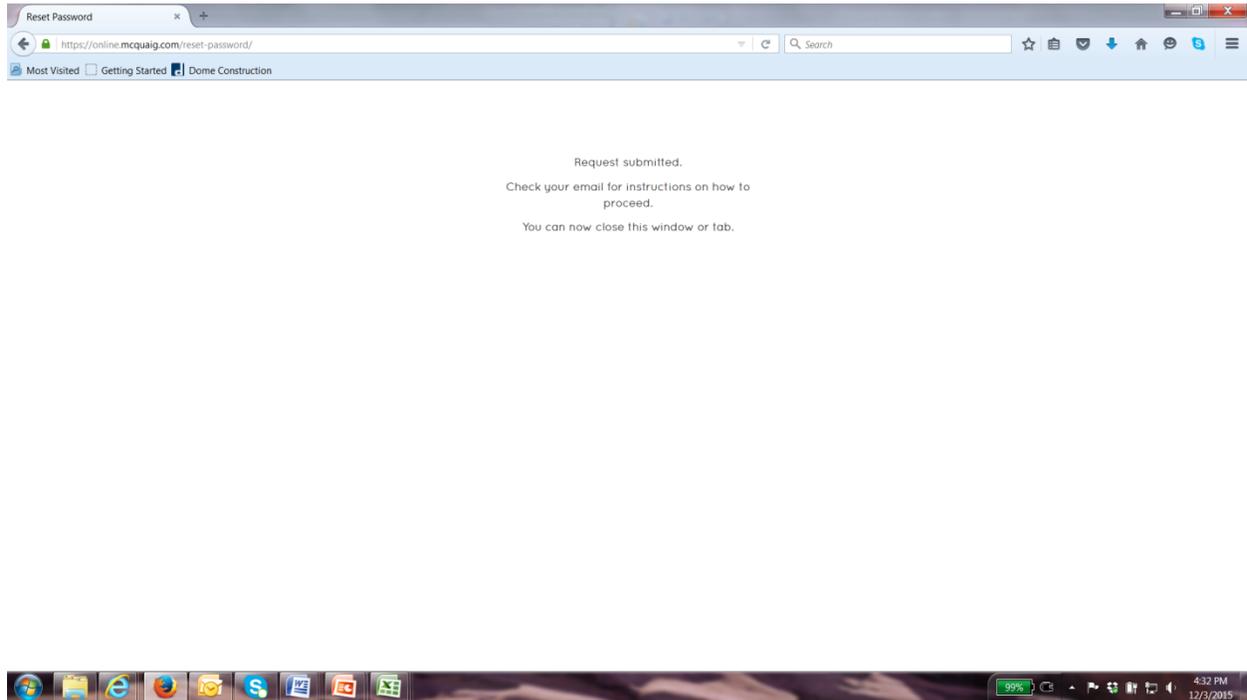
Forgot Password



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



Reset Password Confirmation



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



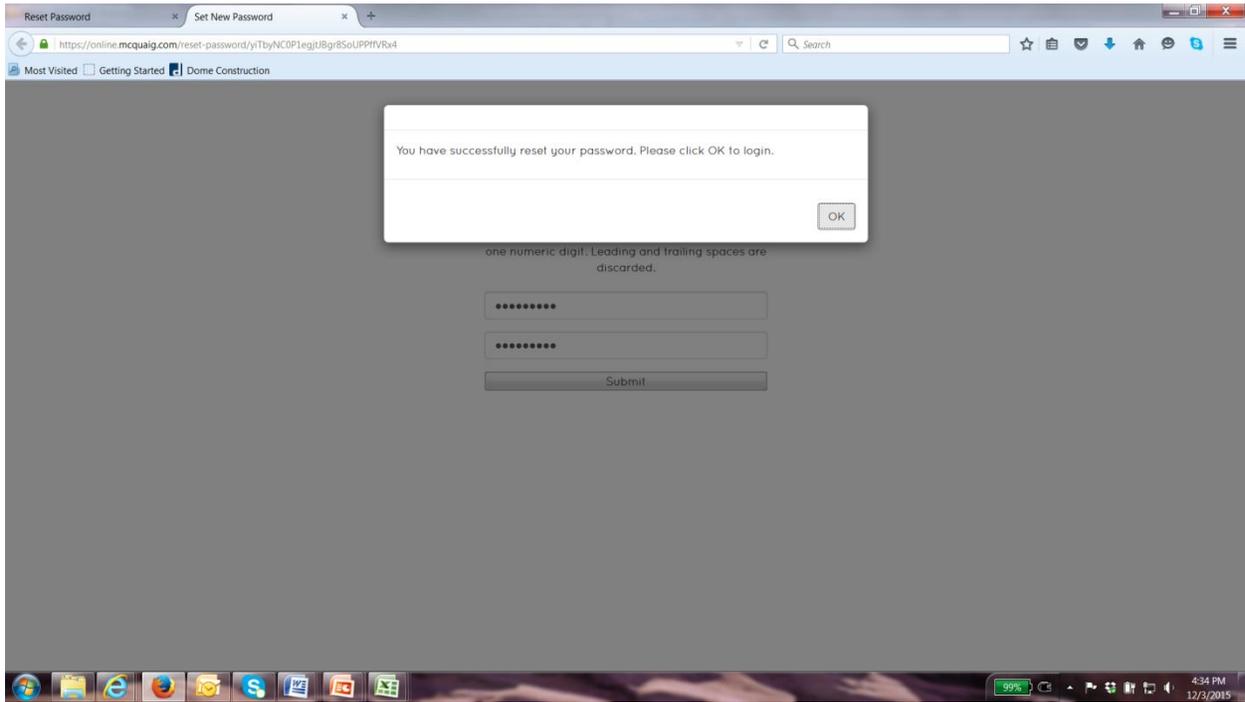
Set New Password/Reset Password

The screenshot shows a web browser window with the title 'Set New Password'. The address bar contains the URL: <https://online.mcquaig.com/reset-password/yITbyNCOP1egjtUBgr8SoUPPHVRx4>. The page content includes the heading 'Set New Password' and a password requirement notice: 'The password must be at least 8 characters long, and must contain at least one letter and at least one numeric digit. Leading and trailing spaces are discarded.' Below this are three input fields: 'New Password', 'Confirm Password', and a 'Submit' button. The browser's taskbar at the bottom shows various application icons and system tray information including 99% battery, 4:33 PM, and 12/3/2015.

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



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'**.