Profile:Match2®

User Manual

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Profile:Match2®

Contents

INTRODUCTION

Profile:Match2™ is an expert assessment system that provides tailored, role specific assessments. Its accessible user-friendly interface allows you to harness state of the art psychometrics and to focus on key competencies that underpin high performance. This user guide is intended to be an aid to those navigating around the Profile:Match2™ system, and is therefore written as though you are following each step on the website.

The Profile:Match2™ assessment system is split into four main functions:

- Profile:Match2™ Job Analysis
- Profile:Match2™ Selection
- Profile:Match2™ Development
- Profile:Match2™ 360° Feedback

This guide will take you through each function in turn, and outline the process from start to finish for each area. You will also find key information on the other resources available from the Profile:Match2™ website, including free tailored sample reports, articles, and testimonials.

Profile:Match2®

SECTION 1 – GETTING STARTED

The Profile:Match2™ website can be found at www.profilematchassessments.com. Once you have logged in and registered for FREE as a Profile:Match2™ user, you can:

- Find out more about the four different functions of Profile:Match2™

- Access FREE tailored sample reports

- Learn more about Profile:Match2™ from articles, research, and testimonials

- Explore technical details and costs

- Obtain free access to the Profile:Match2™ technical manual

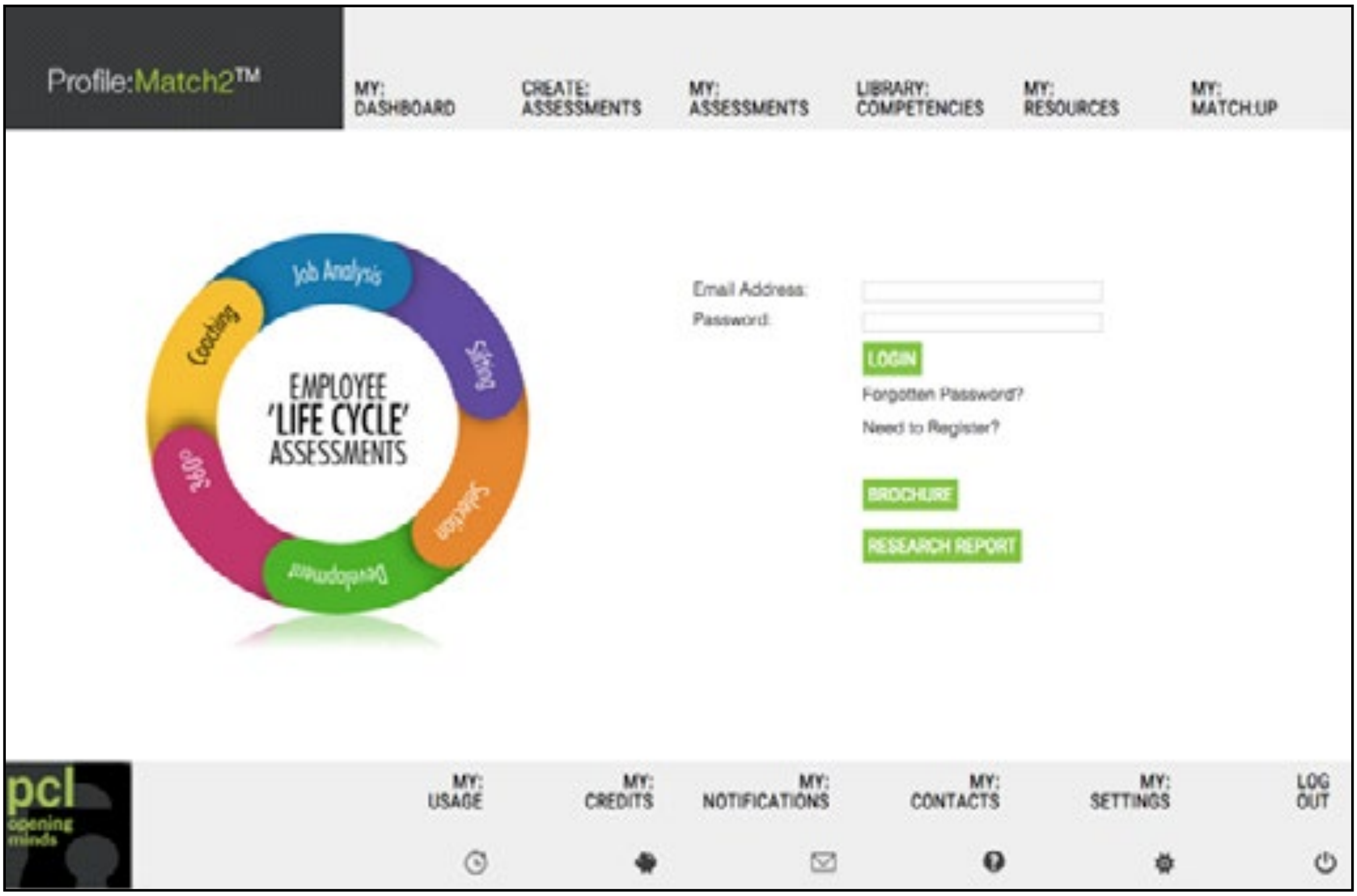
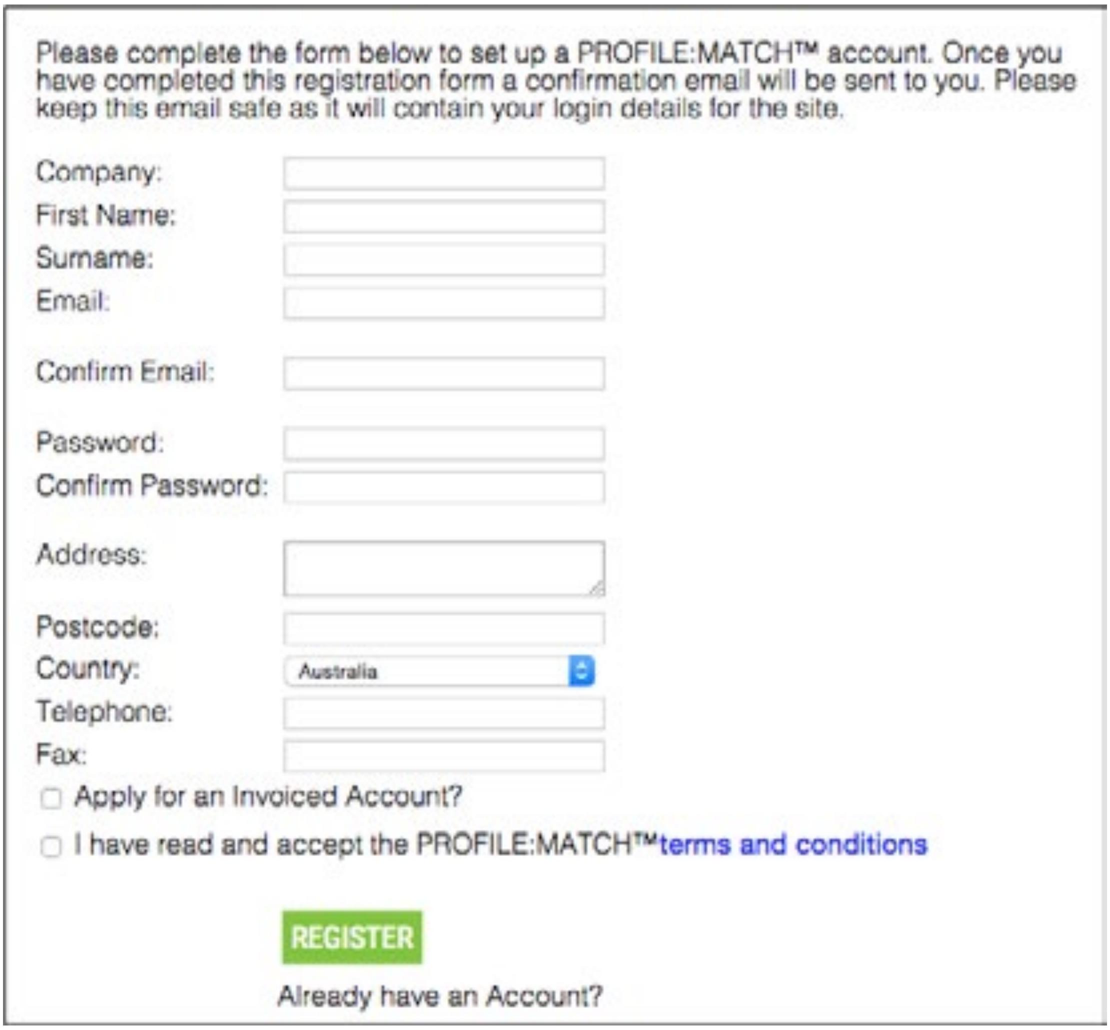


Image 1.1 - Login page

REGISTRATION

Registration on the Profile:Match2™ website is completely FREE. Just click 'Need to Register?' on the login page and complete the form. Requested details include your company name, first name, surname, email address, password, address, postcode, country, telephone number, and fax number (see Image 1.2). You use your email address and password whenever you login. An email will be sent to you confirming your registration details, so keep this safe.


Please complete the form below to set up a PROFILE:MATCH™ account. Once you have completed this registration form a confirmation email will be sent to you. Please keep this email safe as it will contain your login details for the site.

Company:
First Name:
Surname:
Email:
Confirm Email:
Password:
Confirm Password:
Address:
Postcode:
Country: Australia
Telephone:
Fax:

☐ Apply for an Invoiced Account?

☐ I have read and accept the PROFILE:MATCH™terms and conditions

REGISTER

Already have an Account?

Image 1.2 – Registration page

You also need to choose your preferred payment method - invoiced account or pay as you go by credit card. If you prefer to be invoiced for your Profile:Match2™ usage once a month, tick the box next to 'Apply for an Invoiced Account'. Your application will then be processed, and we will inform you by email of the outcome. Leaving this box 'un-ticked' means that you prefer to pay for Profile:Match2™ credits using your credit/debit card via the Protx system.

Below is an example of the email you will receive if you apply for an invoiced account.

Dear Sophie Sample,

Thank you for registering with Profile:Match™. Please keep this email safe as you may need to refer to it later.

Company Name: ABC Limited

Your Name: Sophie Sample

Address: 8 Mount Ephraim Tunbridge Wells Kent

Postcode: TN4 8AS

Country: United Kingdom

Telephone: 01892 559540

Fax: 01892 522096

Email: sophie@abc.com

Password: sophiesample

Your application for an invoiced account is being processed and a member of our team will be in contact with you shortly. In the meantime you may like to purchase credits using our secure online credit card payment facility.

Logon at: http://www.profilematchassessments.com/myAccount/

Kind regards,

Profile:Match™ United Kingdom

8 Mount Ephraim, Tunbridge Wells, TN4 8AS 01892 559 540 | info@profilematchassessments.com

You can then use the email address and password in your version of this email to login immediately and begin using Profile:Match™.

Image 1.3 – Registration confirmation email

For **first time users**, once you have registered and logged into your account you will then be able to:

- Get help choosing competencies using the Job Analysis Survey

- Create new Profile:Match2™ Selection templates

- Create new Profile:Match2™ Development templates

- Create Profile:Match2™ 360 Surveys

- Buy credits and check your credit status if you are not an invoiced client

You will also have access to all of the main resources on the website by clicking "My Dashboard" in the toolbar at the top of the screen.

For **returning users**, once you have registered and logged into your account you will then be able to:

- View a listing of all Profile:Match2™ Selection, Development, 360, or Job Analysis Survey (JAS) templates that you have previously created

- Create new Profile:Match2™ Selection templates or delete any that are no longer required

- Create new Profile:Match2™ Development templates or delete any that are no longer required

- Create or delete Profile:Match2™ 360 Surveys

- Get help choosing competencies using the Job Analysis Survey

- Buy credits and check your credit status if you are not an invoiced client

- View your Profile:Match2™ usage

You will also have access to all of the main resources on the website, which you can access by clicking "My Dashboard" in the toolbar at the top of the screen.

Profile:Match2®

COSTS, SAMPLE REPORTS, AND USER MANUALS

To view costs, a variety of sample reports, and the user manuals for the Profile:Match2™ system, move your cursor over the 'My Resources' tab in the toolbar at the top of the main homepage, and select the desired resource from the dropdown menu. You can also view the required resource by clicking in the 'My Resources' box on the dashboard (see Image 1.4). The sample reports and manuals are available as downloadable PDF documents.

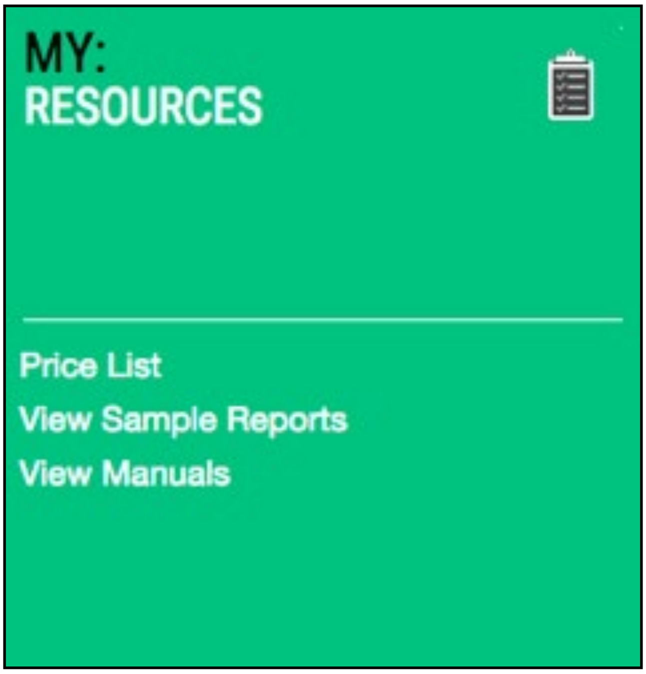


Image 1.4 - My resources

PREVIEW TAILORED REPORTS

It is also possible to create and preview tailored reports for the ‘Selection’ and ‘Development’ functions of the Profile:Match2™ system by using the competencies library. Simply click on the ‘Create Assessments’ tab in the toolbar at the top of the main homepage, select your desired competencies, click ‘Selection Reports’ or ‘Development Report’ in the bottom right hand corner of the screen, and then select ‘Preview’. You will then be provided with a downloadable PDF of your chosen report.

Image 1.5 – Preview selection report

Please note, previews of 360 Feedback and Coaching reports are only available as PDF downloads of existing sample reports (and cannot be tailored). When previewing a tailored report, you can choose up to 10 of the 28 available competencies from the Library in Image 1.5, or select a pre-existing template from the dropdown menu.

For more information on what each competency refers to, hover your cursor over the ‘i’ next to the competency title. This will bring up a small window in which you can view the competency description. These are designed to assist you in the selection of your competencies. If you are a registered user, you can save your competency configuration for future use as one of your Profile:Match2™ templates.

It is also possible to view all of the competency descriptions in PDF format by clicking ‘Library Competencies’, either in the toolbar at the top of the main homepage, or on the dashboard.

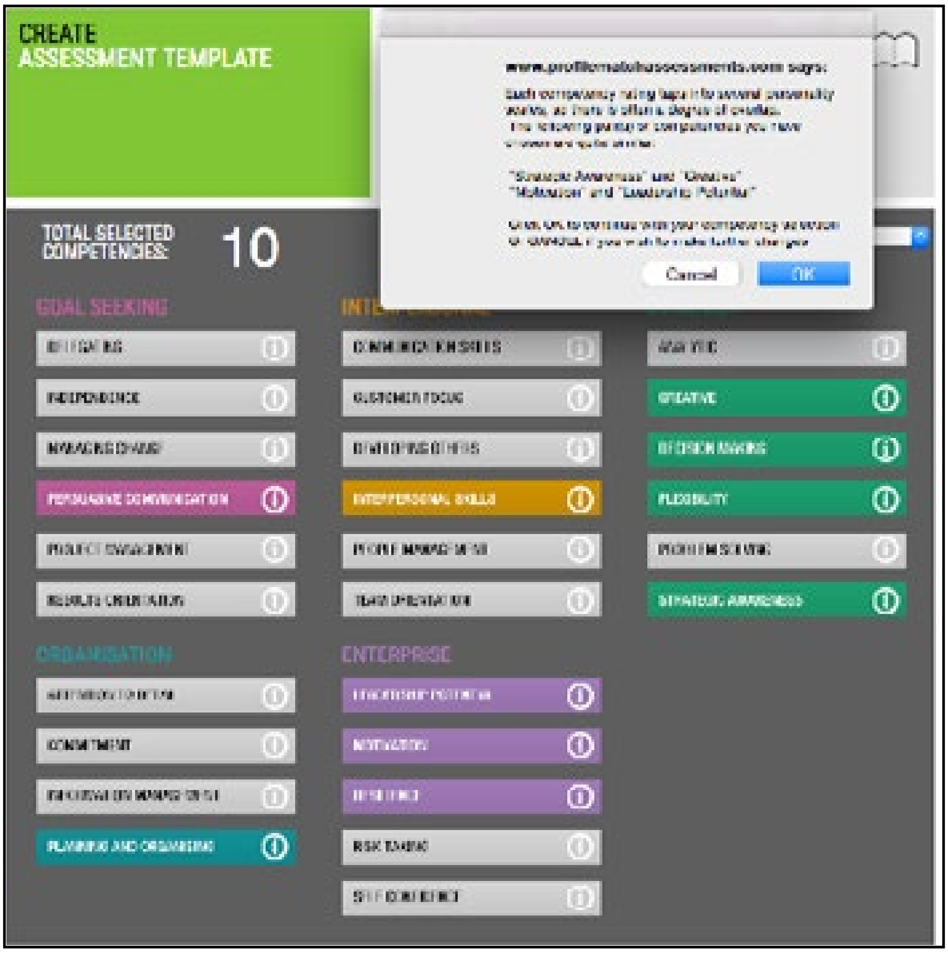


Figure 1.6 Competency Similarity Pop-up

Confirm Competency Selection

Clicking on save next to preview will take you on to the next stage of the set up unless you have selected competencies which have been shown by our analysis to be somewhat similar. The site will flag up in a pop-up which competencies look at similar personality scales and you will be offered the chance to swap these for other competencies or remove them from your assessment set up.

MANAGING YOUR ACCOUNT

With Profile:Match2™, you are in complete control of your account and your usage.

BUYING PROFILE:MATCH2™ CREDITS

Unless you have been set up as an invoiced customer, you will need to purchase sufficient credits to allow each of your candidates to complete online Profile:Match2™ assessments. Please note, if you have insufficient credits on your account, candidates will not be able to complete assessments. To purchase credits, hover your cursor over 'My Credits' in the bottom toolbar, and then click 'Add Credits'. This will take you to the 'Add Credits' screen (see Image 1.6).

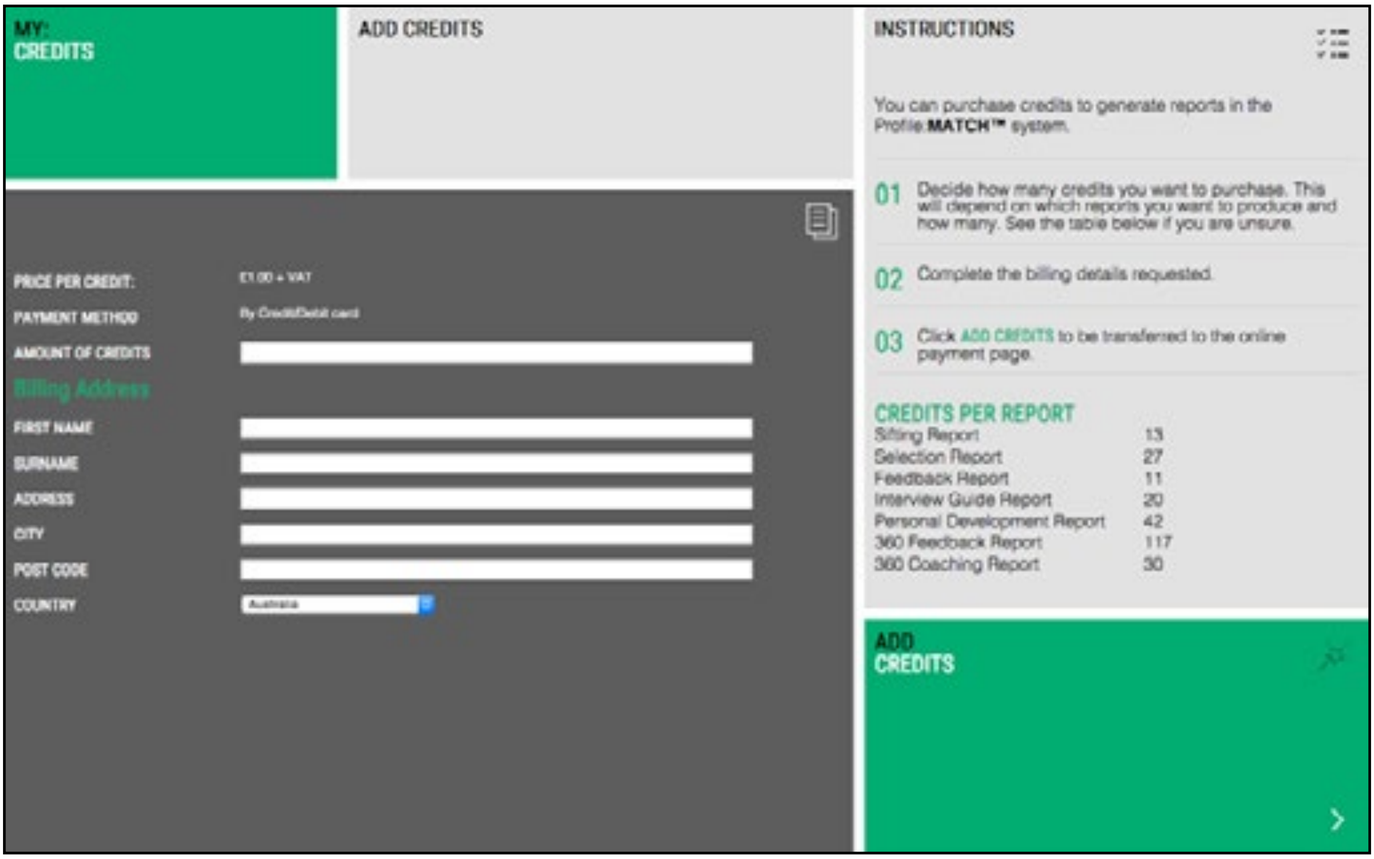


Image 1.6 – Add credits

Enter the number of credits you require by using the 'Credits Per Report' information on the right hand side of the screen. Once you have completed the form, click 'Add Credits' on the bottom right hand corner of the screen to be directed to our secure payment site (see Image 1.7 below). Select your desired payment method and enter your details.

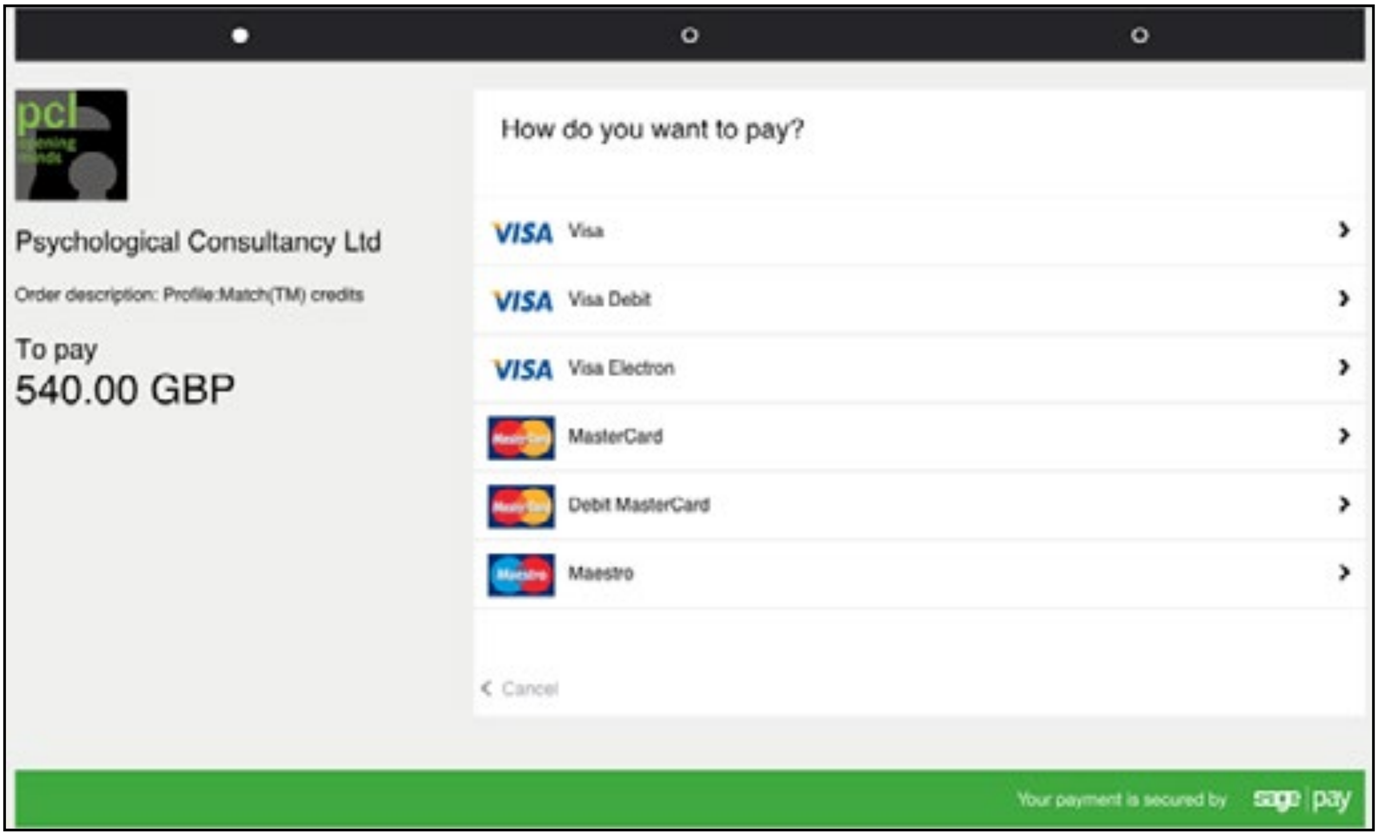


Image 1.7 – How do you want to pay?

Remember, you must ensure you have sufficient credits before you send out the PsyKey guide to your candidates. You will receive a confirmation email notifying you that your debit or credit card has been charged and payment taken successfully.

MANAGING YOUR PROFILE:MATCH2™ USAGE

To view your usage of Profile:Match2™, click ‘My Usage’ on the bottom toolbar. This will take you to the ‘Client Usage’ screen (see Image 1.8 below), where you can view usage reports by the month and year. Instructions on the right hand side of the screen can help you with this.

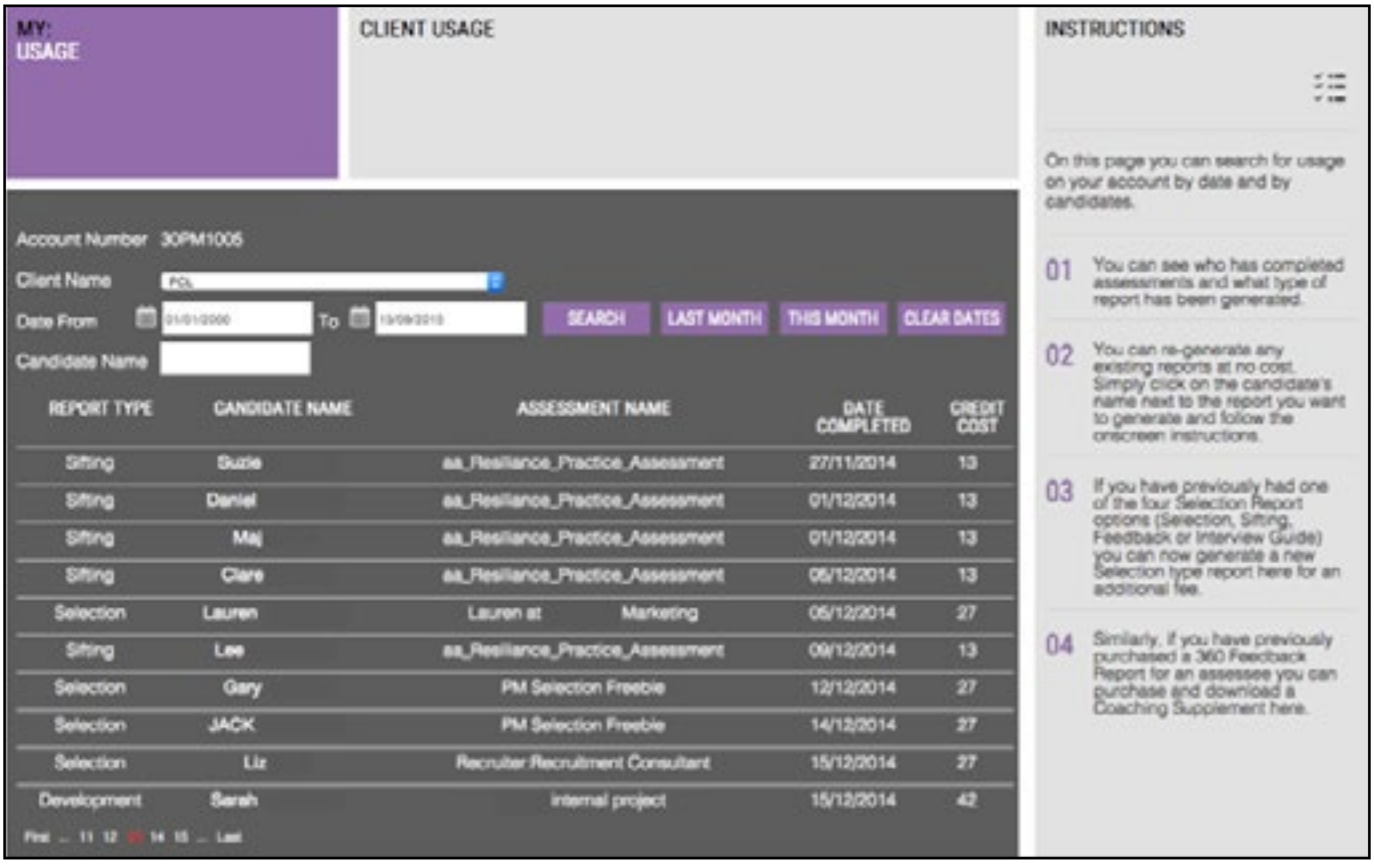


Image 1.8 – Client usage

You can choose to sort the information by clicking ‘Report Type’, ‘Candidate Name’, ‘Assessment Name’, ‘Date Completed’, or ‘Credit Cost’. These columns enable you to keep track of your candidate completions (along with their associated costs), and manage your applicants to ensure assessments are completed on time.

REGENERATING REPORTS IN PROFILE:MATCH2™

You can also use the ‘My Usage’ screen in Image 1.8 above to regenerate candidate Selection, Development, and 360 reports at no additional cost. Simply click on the candidate’s name and follow the onscreen instructions. Please note, if you have previously had one of the four Selection Report options (Selection, Sifting, Feedback or Interview Guide) you can now generate a new Selection type report here for an additional fee.

SECTION 2 – HOW TO SET UP A PROFILE:MATCH2™ JOB ANALYSIS SURVEY

INTRODUCTION

The Job Analysis Survey (JAS) helps you choose critical competencies that relate to success in the role you are recruiting for. The questionnaire should be completed by people who know the job well, or who have a particular interest in the appointment e.g. people who currently do the job, line managers, and people who recruit for the role.

The questionnaire contains 110 statements about characteristics that may improve performance in any given job role. It usually takes between 15-20 minutes to complete. Respondents to the questionnaire need to rate how important they consider each characteristic to be for effective performance in the job. The characteristics are all generally desirable but, when completing the JAS, raters need to prioritise those aspects that they feel are really essential for someone to perform well in the role. You can generate JAS reports based upon any combination of contributors.

It is important to remember that, although the JAS is designed to assist in identifying key competencies, the results should be reviewed carefully before making your final selection. Clients should consider the competencies that are rated most highly, and make their final decisions about priorities within the context of all other information they have about the role. A brief summary of the JAS can be found by clicking on the 'Create Assessments' tab at the top of your main homepage, then select the 'Job Analysis Survey' on the bottom right of the screen and then 'Info' (see Image 2.1).

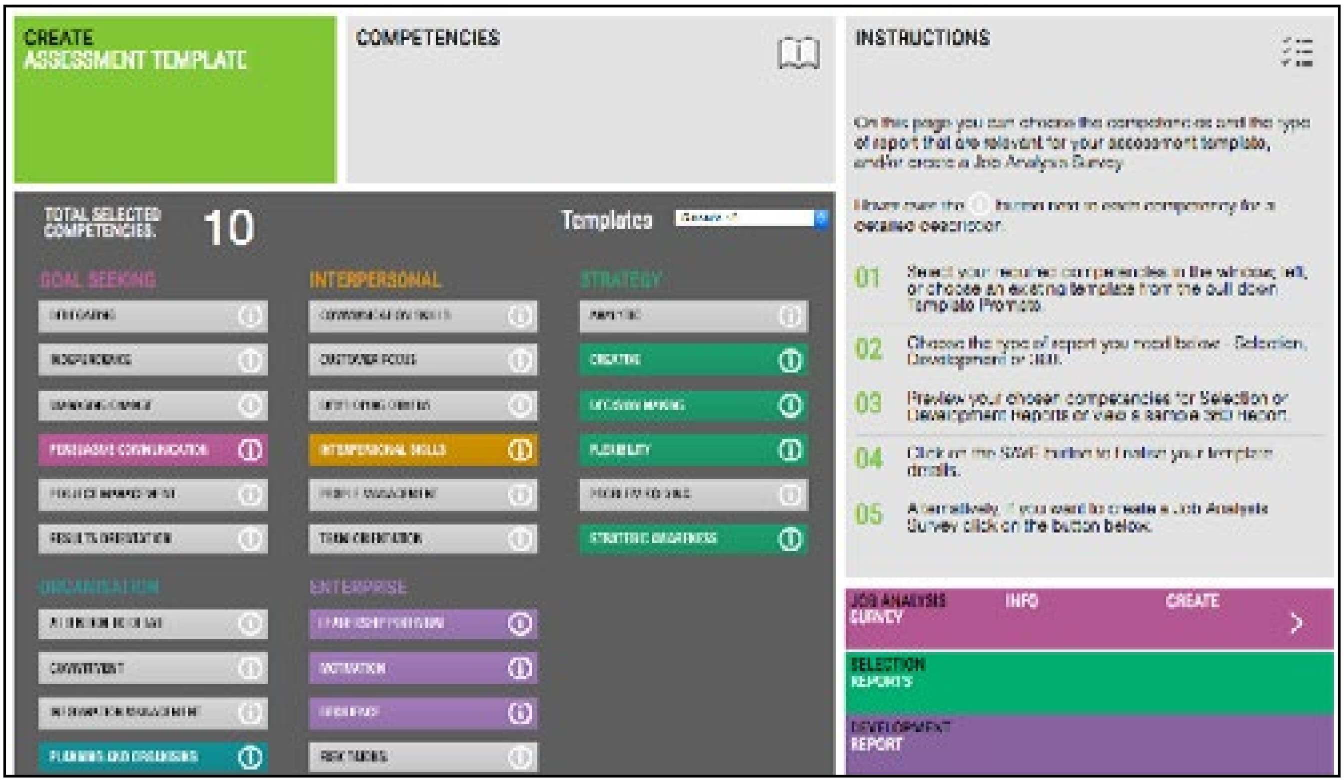


Image 2.1 – Job analysis page

STEP BY STEP GUIDE

CREATING A JOB ANALYSIS SURVEY

Use of this service is currently FREE to all registered Profile:Match2™ users; it is accessed by clicking on the 'Create Assessments' link on the tool bar. Scroll down to the bottom right and select 'Job Analysis Survey', then click 'Create'. This will bring you to the 'Create Job Analysis Survey' set up page (see Image 2.2). You can also view surveys that you have already created by clicking on 'Job Analysis' in the 'My Assessments' box on the dashboard.

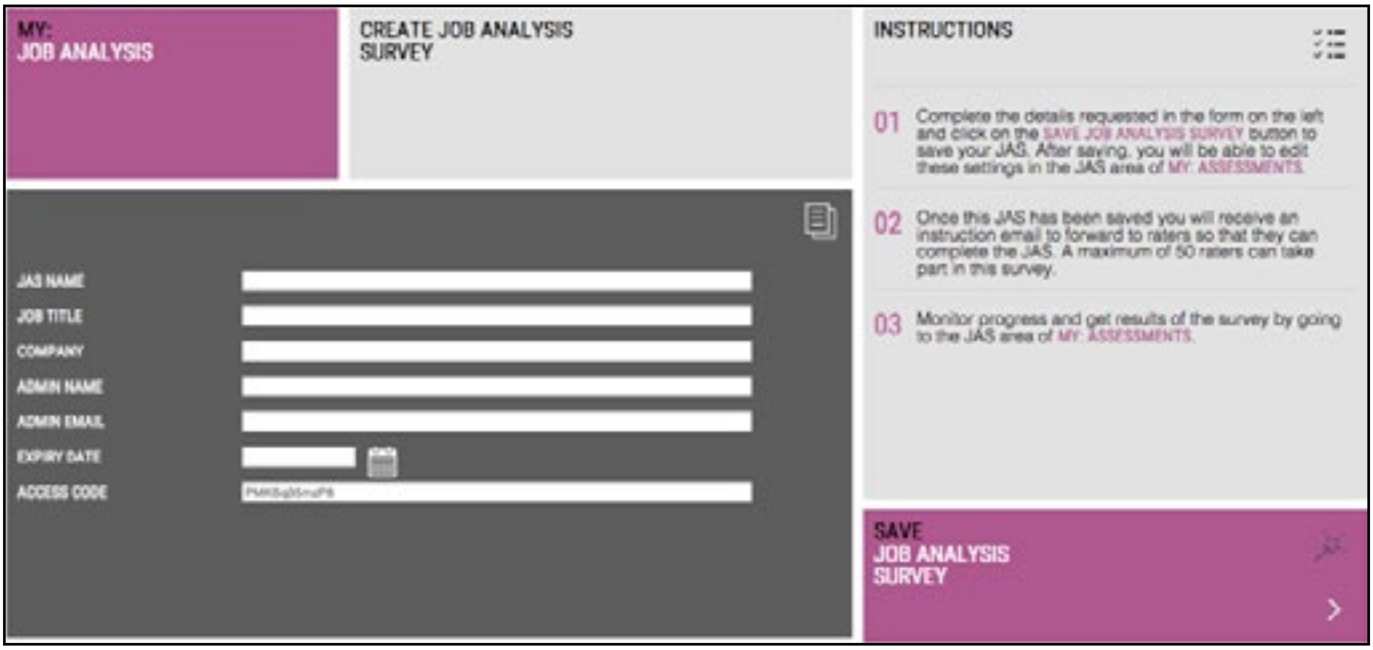


Image 2.2 – JAS setup

You will then need to enter a JAS name, job title, company name, admin name, admin email, and an expiry date for your survey. The page will automatically assign you a unique access code. When you save the JAS you will receive an instruction email to forward to raters so they can complete the JAS.

MANAGING A JOB ANALYSIS SURVEY

You can monitor what is happening as your raters complete the JAS by clicking 'My Assessments' on the toolbar, then 'My Job Analysis Surveys'. You will then be brought to your 'Existing Surveys' page, where you can view your raters' progression for each survey. As each contribution is received, details will appear in the table shown in Image 2.3.

Image 2.3 - JAS template progress

The ‘Raters Completed’ column shows how many raters have been asked to complete the questionnaire and how many have actually completed it. By clicking on the edit symbol in the ‘Edit’ column you can be reminded of your details for each individual survey, including your admin name, expiry date, and access code. When raters have completed the necessary questionnaire you can produce a report, rank ordering the competencies by clicking on the symbol in the ‘Results’ column (see Image 2.3. above).

RATER NAME	EMAIL	COMPLETED	INCLUDE
Sarah Rasmussen	sarah@psychological-consultancy.com	COMPLETED	☑
Geoff Trickey	geoff@psychological-consultancy.com	COMPLETED	☑
Grace Walsh	grace@psychological-consultancy.com	COMPLETED	☑

Image 2.4 – JAS progress

GENERATING REPORTS

To generate the Job Analysis Survey Report, you need to select at least one rater from the list (shown in Image 2.4) by ticking the box in the ‘Include’ column next to their name, and then click ‘continue to results’ in the bottom right hand corner of the screen. You can choose which raters to include, and you do not need to include all raters to generate a report. You will then be able to download the report (in PDF format), as seen in Image 2.5.

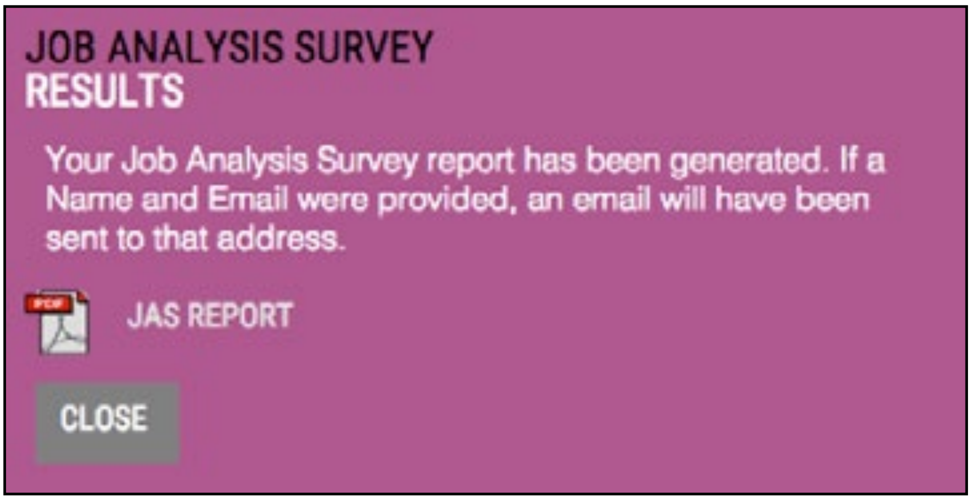


Image 2.5 – JAS report generation

In the Job Analysis Survey Report, all the Profile:Match2™ competencies will be listed in order of priority, along with the total number of ‘votes’ awarded by your raters to each competency during the project, as shown in Image 2.6. You can now use this as a guide to choosing your competencies for your Profile:Match2™ templates.

Priority	Competencies	Points
1	**Attention to Detail** Having a practical, realistic outlook; being conscientious, attentive to detail and dutiful.	91
2	**Planning and Organising** Being organised, thorough and conscientious; appreciating the importance of planning and co-ordination in meeting organisational objectives.	89
3	**Customer Focus** Recognising the significance of customer satisfaction to organisational success and responding to customers in a professional and courteous way.	83
4	**Resilience** Remaining calm and rational under pressure, being even-tempered, confident and generally upbeat, and maintaining emotional independence.	77

Image 2.6 – JAS report

Profile:Match2

SECTION 3 – HOW TO SET UP A PROFILE:MATCH2™ SELECTION SURVEY

INTRODUCTION

Profile:Match2™ delivers Sifting and Selection Reports and Interview Guides, all focussed on the competencies deemed essential for a particular job. All you need to do is identify the characteristics required for this appointment from the Profile:Match2™ competency library (or you may have done this using the JAS). Profile:Match2™ then builds your bespoke questionnaire and emails you the instructions needed by your candidates to complete the questionnaire online. Once completed, their reports are delivered immediately to your inbox.

STEP BY STEP GUIDE

CREATING YOUR PROFILE:MATCH2™ SELECTION TEMPLATE

When you log in to Profile:Match2™, you will arrive at the 'Create Assessment Template' page (see Image 3.1 below). You can also navigate to this page from any other part of the website by clicking 'Create: Assessments' on the toolbar at the top of the main homepage.

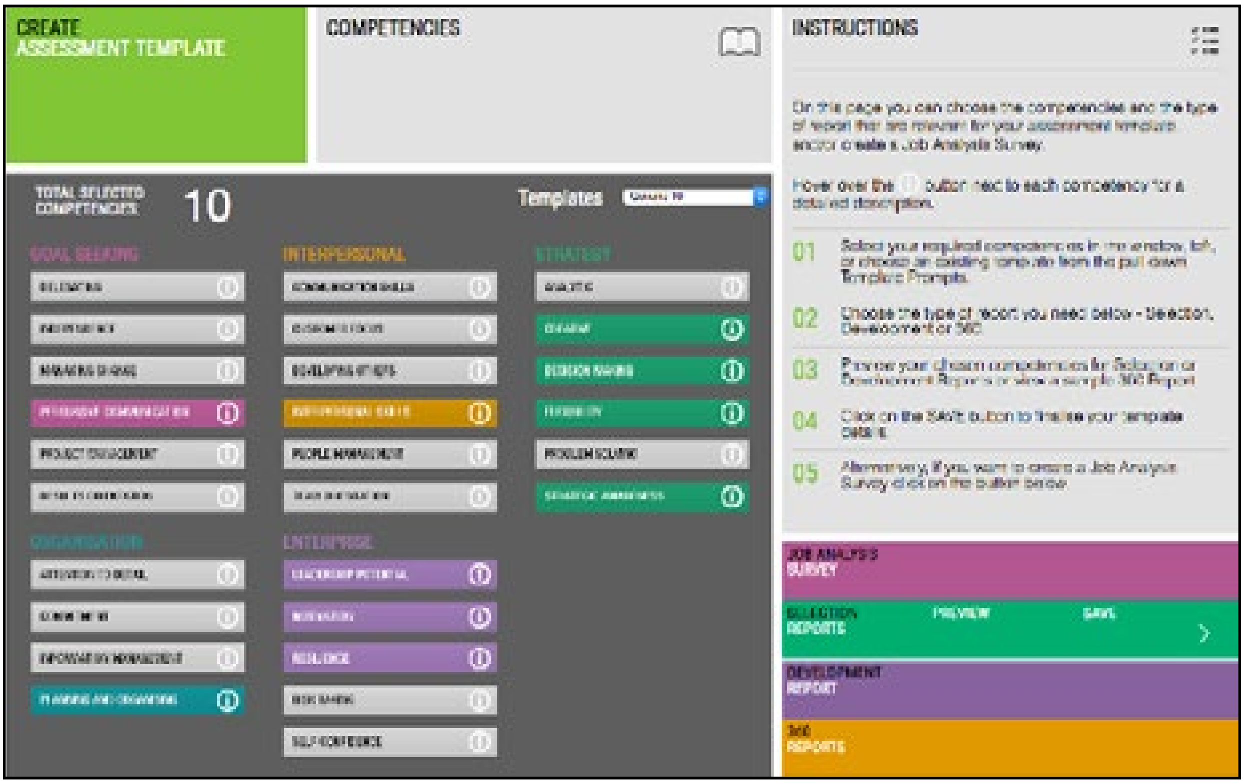


Image 3.1 – Create assessment template page

Next choose the competencies you want to include in your template. Your choice of competencies may be driven by an existing competency framework, or by the results of the Job Analysis Survey if you used this, or by looking at suggested competencies for some job roles given in the pull down 'Templates' menu.

You can include up to 10 competencies in your template simply by clicking on them (see Image 3.1). If you change your mind, you can re-click the competency and it will be deselected. From this page you can also download a PDF of all the competency descriptions by selecting 'Library: Competencies' in the top toolbar. Once you have selected your competencies, click 'Selection Reports' on the right hand side of the page, and then click 'Save'.

SAVING YOUR PROFILE:MATCH2™ SELECTION TEMPLATES

The next page is the 'Save Selection Template' page, where you need to fill in each of the fields (Image 3.2). See below for more information on what is required in each of the fields.

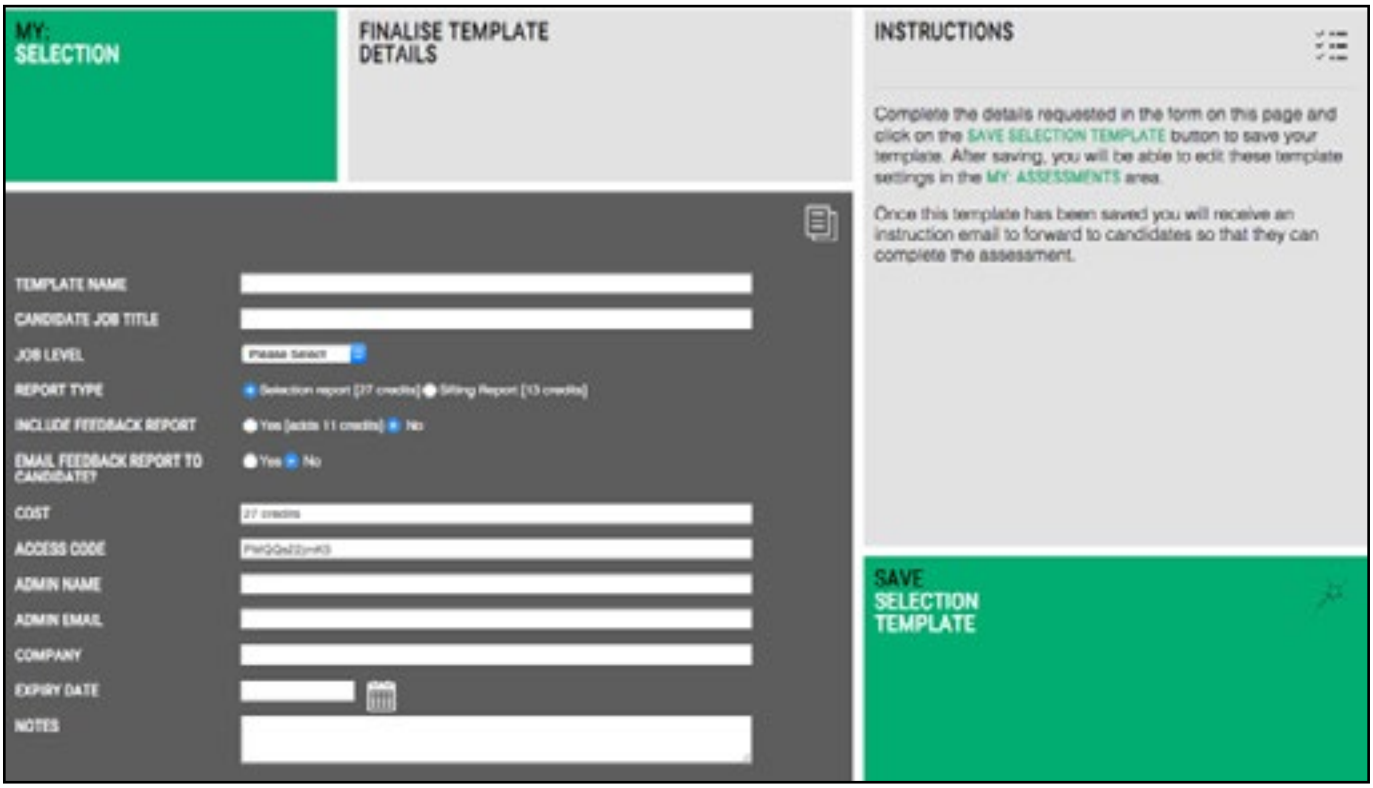


Image 3.2 – Save selection template

Template Name

This is the name of the competency template you will create, and it will help you to find it when you next want to use it. It is for your own purposes only; this name will not appear on the report.

Candidate Job Title

This is the name of the role you are assessing. It is important that you choose this carefully as it will appear on every page of the Profile:Match2™ report.

Job Level

Specify whether this role is non-managerial, junior manager, middle manager, senior manager, or director.

Report Type
This option allows you to specify whether you would like a ‘Sifting Report’ (i.e. a summary of key findings with suggested areas to explore further), or a ‘Selection Report’ (i.e. full competency descriptions with detailed narrative).

Include Feedback Report
Checking ‘Yes’ will automatically generate a ‘Candidate Feedback Report’, which will be emailed to the specified email address (along with the Profile:Match2™ report), as a PDF document (this will add additional credits to the cost of an assessment). Please note the feedback reports cannot be added at a later date.

Email Feedback Report to Candidate?
Selecting ‘Yes’ will automatically send the Feedback Report to the candidate’s email address as well as to the Admin email. There is no additional charge for this service. This report is suitable for candidate use.

Note Regarding Interview Guide Report
Please note, the Interview Guide can be chosen later for candidates shortlisted for interview by clicking on ‘My:Assessments’ in the main toolbar, then selecting ‘My:Assessment Templates’, and then clicking on the symbol in the ‘Generate Report’ column to the right of your chosen selection template. You can then click on the name of a candidate that has completed a Selection Report, and select ‘Interview Guide’ (this will add additional credits to the cost of an assessment).

Cost
This outlines the number of credits your chosen configuration will cost you per person.

Access Code
This is the code that the candidates will use to access the assessment. A random code is automatically generated and will appear in the box. Please note the access code cannot be changed.

Admin Name
This is the name of the person who will receive the Profile:Match2™ report. The system will automatically input the name of the registered client, but you can change this now or later.

Admin Email
This is the email address where the Profile:Match2™ report will be sent. The system will automatically input the email address of the registered client, but this can be changed when completing the set up, or at a later date.

Company
This is the name of the company that requires the assessment.

Expiry Date
This is the date that access to the Profile:Match2™ assessment expires. This date can be changed later, and you can also ‘re-activate’ an expired template by amending to a future date.

Notes
This section is space for you to make notes about this Profile:Match2™ template.

Please note, once you save your template, you will not be able to amend the fields of: ‘Candidate Job Title’, ‘Job Level’, ‘Report Type’, ‘Include Feedback Report’, ‘Email Feedback Report to Candidate?’, ‘Cost’, ‘Access Code’, or ‘Company’.

After you have completed the fields, click ‘Save Selection Template’ in the bottom right hand corner of the screen. A PsyKey Guide, providing instructions for your candidates on how to access the questionnaire, will be sent to the admin email you have entered.

IMPORTANT BEFORE INSTRUCTING CANDIDATES

Please note that if you are NOT an invoiced client, before you send out the candidate instruction sheets you MUST ensure that you have used your credit card to purchase sufficient credits to allow each of your candidates to take the online assessment. If you have insufficient credits, your candidates will not be granted access to the online assessment when they log in to complete the survey.

Once you have created a template, it can be viewed and re-activated at any time by clicking on ‘My Assessments’ and then ‘My Selection Templates’, or by clicking ‘Selection’ in the ‘My Assessments’ box on the dashboard (see Image 3.3 below).

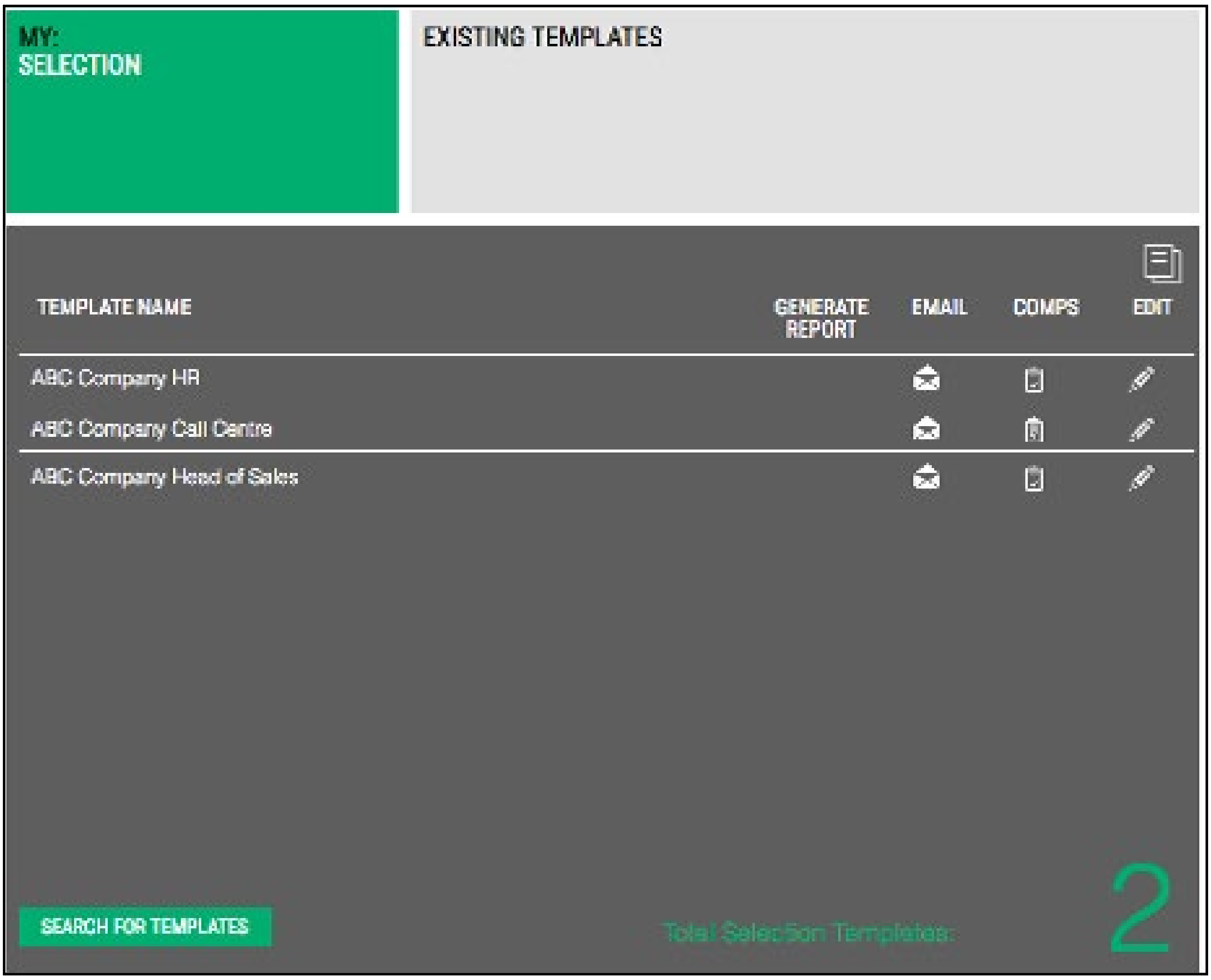


Image 3.3 – Existing templates

Selecting the 'Edit' symbol next to your desired template will allow you to view the details of the template. You will also be able to edit the fields of: 'Template Name', 'Admin Name', 'Admin Email', and 'Notes'. You can also 're-activate' an expired template by changing the 'Expiry Date' to one set in the future.

Selecting the 'Comps' symbol next to the desired report provides a reminder of the competencies that were selected when the template was created (please note, these cannot be changed), whilst selecting the 'Email' symbol will resend the Psykey instruction email to the address written in the 'Admin Email' field.

GENERATING REPORTS

There are a number of ways to generate Selection Reports:

Automatic Generation

Once the candidate has successfully completed an assessment a report (plus the Feedback Report if selected) is automatically generated and emailed to the address given during template setup. Please note, if you selected 'Yes' to the option 'Email Feedback Report to Candidate?' (see Image 3.2. above), a Feedback Report will be automatically emailed to the candidate as well as to the Admin email address.

Regenerate Existing Report

You will also be able to regenerate completed candidate reports that have previously been automatically generated. Go to the 'Existing Templates' screen within the Selection section of the Profile:Match2™ website (see Image 3.3 above). Click on the 'Generate Report' symbol next to the desired template, select the name of the candidate, and then click on the symbol next to the option that had previously been automatically generated to produce an 'in-browser' .pdf version of the report (at no additional cost). Alternatively, you can use the 'My Usage' screen shown in Image 1.8 of Section 1 above. Simply click on the candidate's name, and select the report type that had been previously automatically generated (at no additional cost).

Generate Additional Report Option

In Profile:Match2™ there are 4 report options for Selection templates - Selection, Sifting, Feedback, or Interview Guide. During template setup you will choose one of these options (or 2 if you select Feedback report as well) but later you may want to generate an additional report. For example, you may have set up your template to produce a Sifting Report but now you have shortlisted a number of candidates and you want either a more in-depth Selection Report to get more information about the candidates or an Interview Guide Report to help with questions for interview. You can now do this within the Profile:Match2™ system for an additional fee.

Go to the 'Existing Templates' screen within the Selection section of the Profile:Match2™ website (see Image 3.3 above), click on the 'Generate Report' symbol next to the desired template, and then click the name of the desired candidate. Select a type that differs from the automatically generated option to produce an 'in-browser' .pdf version (please note, this will cost an additional fee).

Alternatively, you can use the 'My Usage' screen shown in Image 1.8 of Section 1 above to generate an alternate report type. Simply click on the candidate's name and select an option that differs from your original automatically generated option to produce an 'in-browser' .pdf version (please note, this will cost an additional fee).

Profile:Match2

SECTION 4 – HOW TO SET UP A PROFILE:MATCH2™ DEVELOPMENT SURVEY

INTRODUCTION

Profile:Match2™ Personal Development Report offers a complete audit of an individual's potential from a personality perspective. Based on high status psychometric information, it considers the implications of each profile for aptitudes and competencies at work. It offers an authoritative alternative viewpoint against which an individual can review their current self-perceptions, allowing them to set new personal goals and objectives and to map out realistic and attainable paths for personal development and for career planning.

STEP BY STEP GUIDE

CREATING YOUR PROFILE:MATCH2™ DEVELOPMENT TEMPLATE

When you log in to Profile:Match2™, you will arrive at the 'Create Assessment Template' page (see Image 4.1 below). You can also navigate to this page from any other part of the website by clicking 'Create: Assessments' on the toolbar at the top of the main homepage.

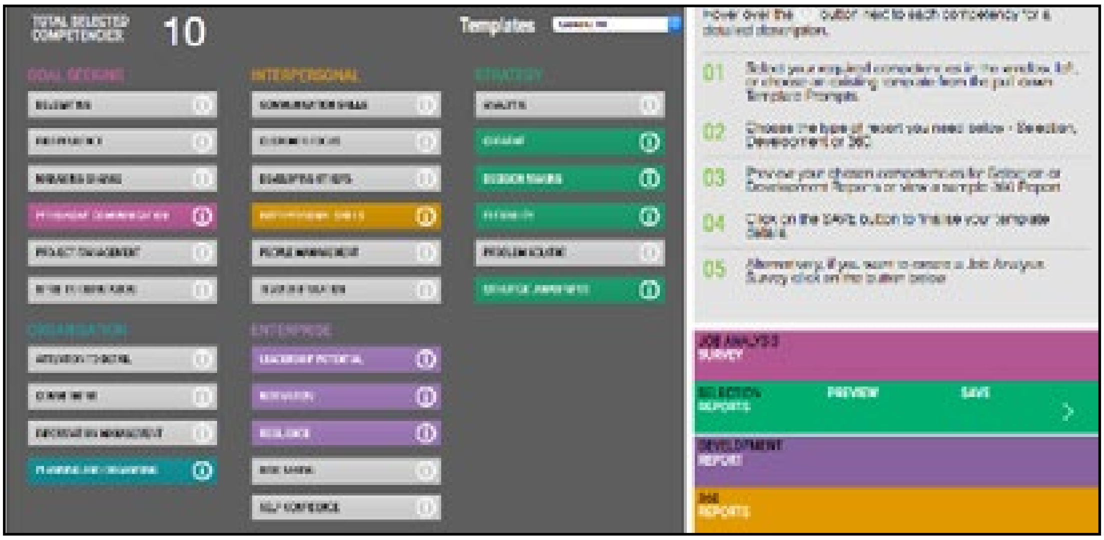


Image 4.1 – Create assessment page

Next choose the competencies you want to include in your template. Your choice of competencies may be driven by an existing competency framework, or by the results of the Job Analysis Survey if you used this, or by looking at suggested competencies for some job roles given in the pull down 'Templates' menu.

You can include up to 10 competencies in your template simply by clicking on them (see Image 4.1). If you change your mind, you can re-click the competency and it will be deselected. From this page you can also download a PDF of all the competency descriptions by selecting 'Library: Competencies' in the top toolbar. Once you have selected your competencies, click 'Development Reports' on the right hand side of the page, and then click 'Save'.

SAVING YOUR PROFILE:MATCH2™ DEVELOPMENT TEMPLATES

The next page is the ‘Save Development Template’ page, where you need to fill in each of the fields (see Image 4.2). See below for more information on what is required in each field.

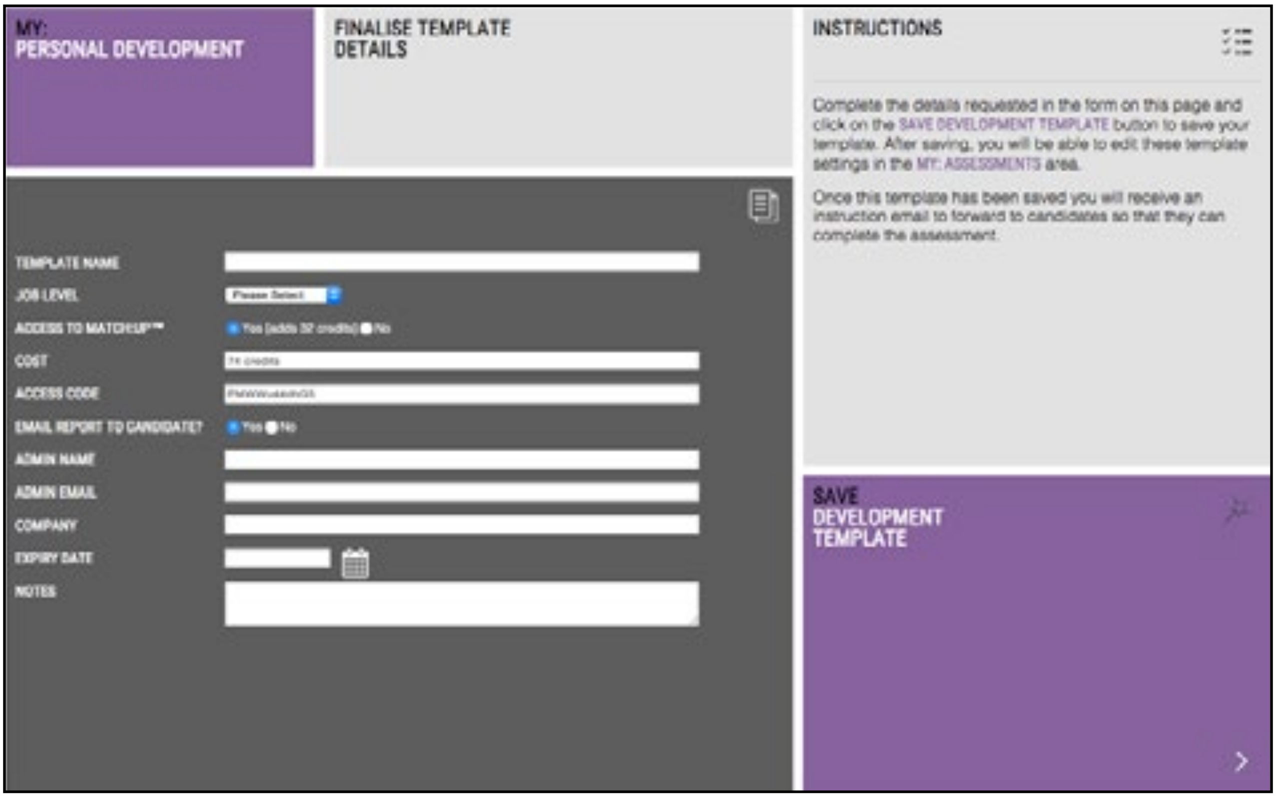


Image 4.2 – Save development template

Template Name

This is the name of the competency template you create, and it will help you to find it when you next want to use it. It is for your own purposes only; this name will not appear on the report.

Job Level

Specify whether the role is non-managerial, junior manager, middle manager, senior manager, or director.

Access to Match:Up™

This allows candidates to access Match:Up™, the Profile:Match2™ online coaching tool (this will add additional credits to the cost of an assessment).

Cost

This outlines the number of credits your configuration will cost you per person.

Access Code

This is the code that the candidates will access the assessment with. A random code is automatically generated and will appear in the box. Please note, the access code cannot be changed.

Email Report to Candidate?
Checking 'Yes' will automatically send a Personal Development Report to the candidate, which will be sent, as a PDF document, to the email address they used when they registered for the assessment. There is no charge for this service.

Admin Name
This is the name of the person who will receive the Profile:Match2™ Report. The system will automatically input the name of the registered client, but you can change this now or later.

Admin Email
This is the email address where the Profile:Match2™ Report will be sent. The system will automatically input the email address of the registered client, but this can be changed when completing the set up or at a later date.

Company
This is the name of the company that requires the assessment.

Expiry Date
This is the date that access to the Profile:Match2™ assessment expires. This date can be changed later, and you can also 're-activate' an expired template by amending to a future date.

Notes
This section is space for you to make notes about the Profile:Match2™ template.

After you have completed the fields, click 'Save Development Template' in the bottom right hand corner of the screen. A PsyKey Guide, providing instructions for your candidates on how to access the questionnaire will be sent to the Admin Email address you have entered.

IMPORTANT BEFORE INSTRUCTING CANDIDATES

Please note that if you are NOT an invoiced client, before you send out the candidate instruction sheets you MUST ensure that you have used your credit card to purchase sufficient credits to allow your candidates to take the online assessment. If you have insufficient credits, your candidates will not be granted access to the online assessment when they attempt to log in to complete the questionnaire.

Once you have created a template, it can be viewed and re-activated at any time by clicking on ‘My Assessments’ and then ‘Personal Development Templates’, or by clicking ‘Personal Development’ in the ‘My Assessments’ box on the dashboard (see Image 4.3 below).

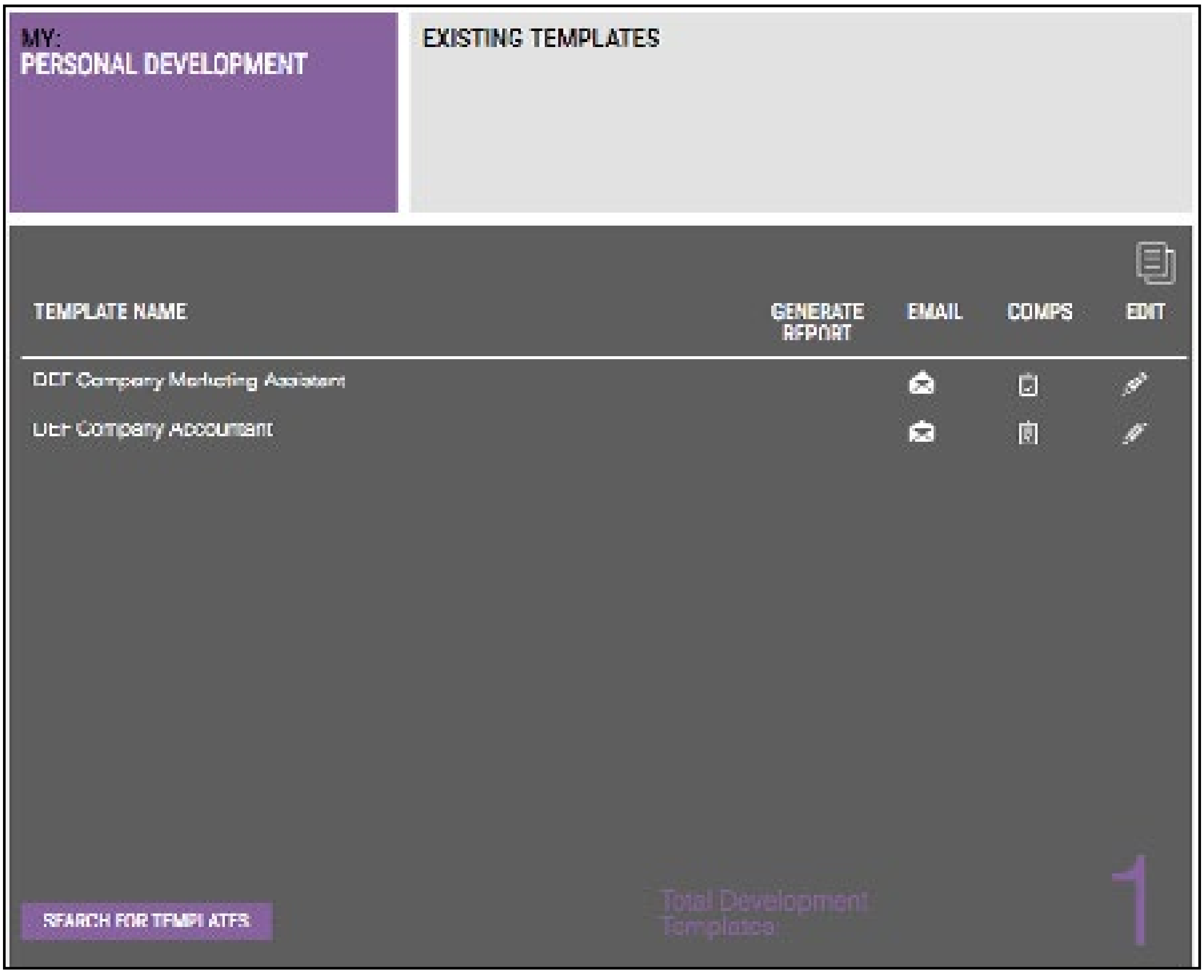


Image 4.3 – Existing templates

Selecting the ‘Edit’ symbol next to your desired template will allow you to view the details of the template. You will also be able to edit the fields of: ‘Template Name’, ‘Admin Name’, ‘Admin Email’, and ‘Notes’. You can also ‘re-activate’ an expired template by changing the ‘Expiry Date’ to one set in the future.

Selecting the ‘Comps’ symbol next to the desired report provides a reminder of the competencies that were selected when the template was created (please note, these cannot be changed), whilst selecting the ‘Email’ symbol will resend the Psykey instruction email to the address written in the ‘Admin Email’ field.

GENERATING REPORTS

Personal Development Reports are automatically generated at the time a participant completes the assessment, and can be regenerated subsequently. There are a number of ways to generate Personal Development Reports:

Automatic Generation

Once the participant has successfully completed the assigned assessment, you will receive an email at the address given during setup in the Admin Email box with the Personal Development Report attached (in .pdf format). Please note, if you selected ‘Yes’ to the option ‘Email Report to Candidate?’ (see Image 4.2. above), the Personal Development Report will be automatically emailed to the candidate at no extra cost.

Regenerate Existing Report

You will also be able to regenerate completed Personal Development Reports from the ‘Existing Templates’ screen within the Personal Development section of the Profile:Match2™ website (see Image 4.3 above). Click on the ‘Generate Report’ symbol next to the desired template, and then select the name of the participant to generate an ‘in-browser’ .pdf version of the report.

Alternatively, you can use the ‘My Usage’ screen shown in Image 1.8 of Section 1 above to regenerate a completed Personal Development Report at no additional cost by simply clicking on the candidate’s name.

SECTION 5 – HOW TO SET UP A PROFILE:MATCH2™ 360 FEEDBACK SURVEY

INTRODUCTION

P:M360™ assessments are based on the key competencies for any role. In this approach, an individual's self-ratings of performance are compared to observer ratings from line managers, peers, direct reports or clients. Uniquely, in P:M360™, these performance ratings are considered against the background of candidate potential – the extent to which their personality is likely to facilitate performance. This all-round 360° perspective provides a particularly robust assessment, and a sound basis for reviews, appraisals and personal development.

STEP BY STEP GUIDE

SETTING UP A PROFILE:MATCH2™ 360 FEEDBACK SURVEY

When you log in to Profile:Match2™, you will arrive at the 'Create Assessment Template' page. You can also navigate to this page from any other part of the website by clicking 'Create: Assessments' on the toolbar at the top of the main homepage.

STEP 1 – SELECTING COMPETENCIES

You can include up to 10 competencies in your '360 Report' simply by clicking on them (see Image 5.1). If you change your mind, you can re-click the competency and it will be deselected. Your choice of competencies may be driven by an existing competency framework, or by the results of the Job Analysis Survey if you used this, or by looking at suggested competencies for some job roles given in the pull down 'Templates' menu (e.g. Customer Service, Generic10™). From this page you can also download a PDF of all the competency descriptions by selecting 'Library: Competencies' in the top toolbar. Once you have selected your competencies, click '360 Reports' on the right hand side of the page, and then click 'Save'.

Image 5.1 – 360 report page

STEP 2 – SURVEY SETUP

Each survey you create needs to be setup using the ‘Survey Setup’ page (see Image 5.2 below). Each of the following criteria needs to be completed in the boxes provided. See below for more information on what is required in each of the fields.

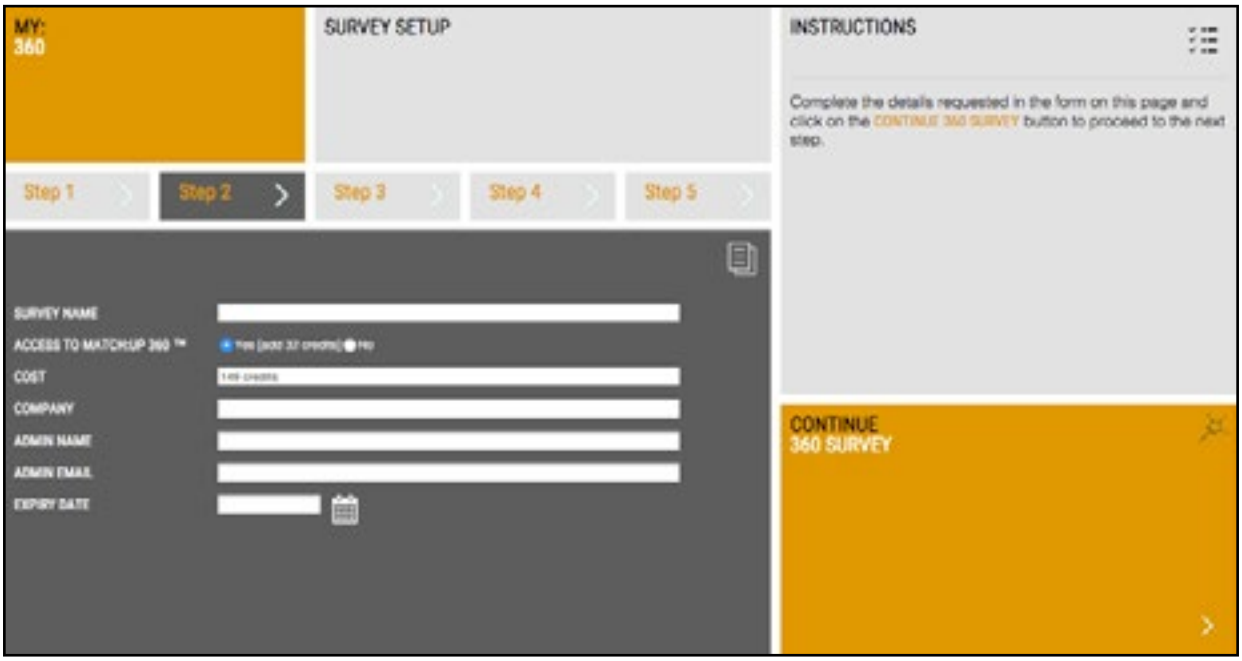


Image 5.2 – Survey setup

Survey Name
This is the name of the survey you will create, and is used to identify it in the ‘Existing Surveys’ area.

Access to Match:Up 360™
This allows candidates to access Match:Up™, the Profile:Match2™ online coaching tool (this will add additional credits to the cost of an assessment).

Cost
This outlines the number of credits this will cost you per person.

Company
This is the name of the company that requires the 360.

Admin Name
This is the name of the administrator for this survey. The administrator is the person who will be the first point of contact for candidates and raters taking the survey in the case of any queries. The system will automatically input the name of the account holder, but this can be changed.

Admin Email
This is the email address of the administrator for this survey. The system will automatically input the email address of the account holder, but this can be changed.

Profile:Match2

Expiry Date
This is the date that access for each candidate and rater completing the survey will expire. Please ensure that you allow enough time for the assessments to be completed.

Once all the above information has been entered, click ‘Continue 360 Survey’ to go to Step 3 of the survey set up.

STEP 3 – OPEN-ENDED QUESTIONS
Each Profile:Match2™ 360 Survey can include a number of selected open-ended questions (OEQs) or extra questions constructed by the survey manager (see Image 5.3). These are both optional extras.

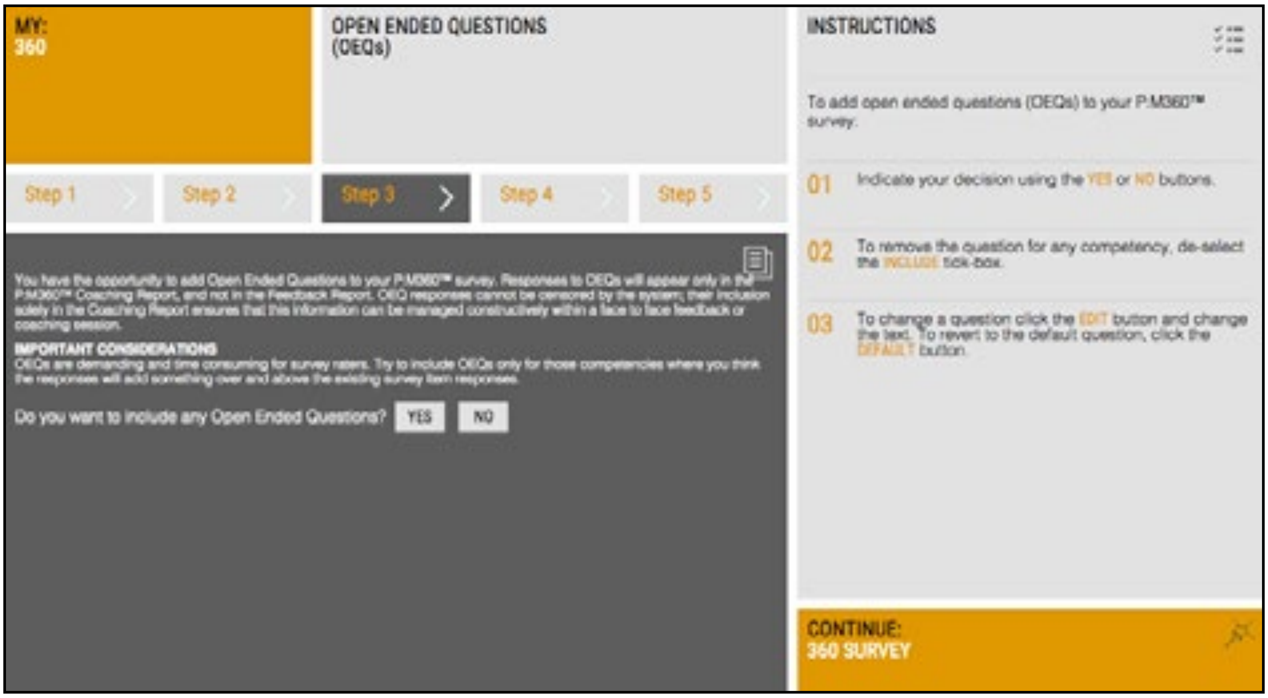


Image 5.3 – Open ended questions

At this stage, you will be asked if you want to include open-ended questions to gain further information about the candidate. Selecting ‘No’ will take you straight to Step 4. If you choose yes, you will be given the opportunity to overwrite or omit the question relating to each competency (see Image 5.4 below). Please note, answers to OEQs will only be included in the Profile:Match2™ 360 Coaching Report, and not in the Feedback Report. The Feedback Report is designed to be given to the candidate while the Coaching Report is used by the coach or line manager and contains deeper insights into the pool of information generated by the P:M360™ system.

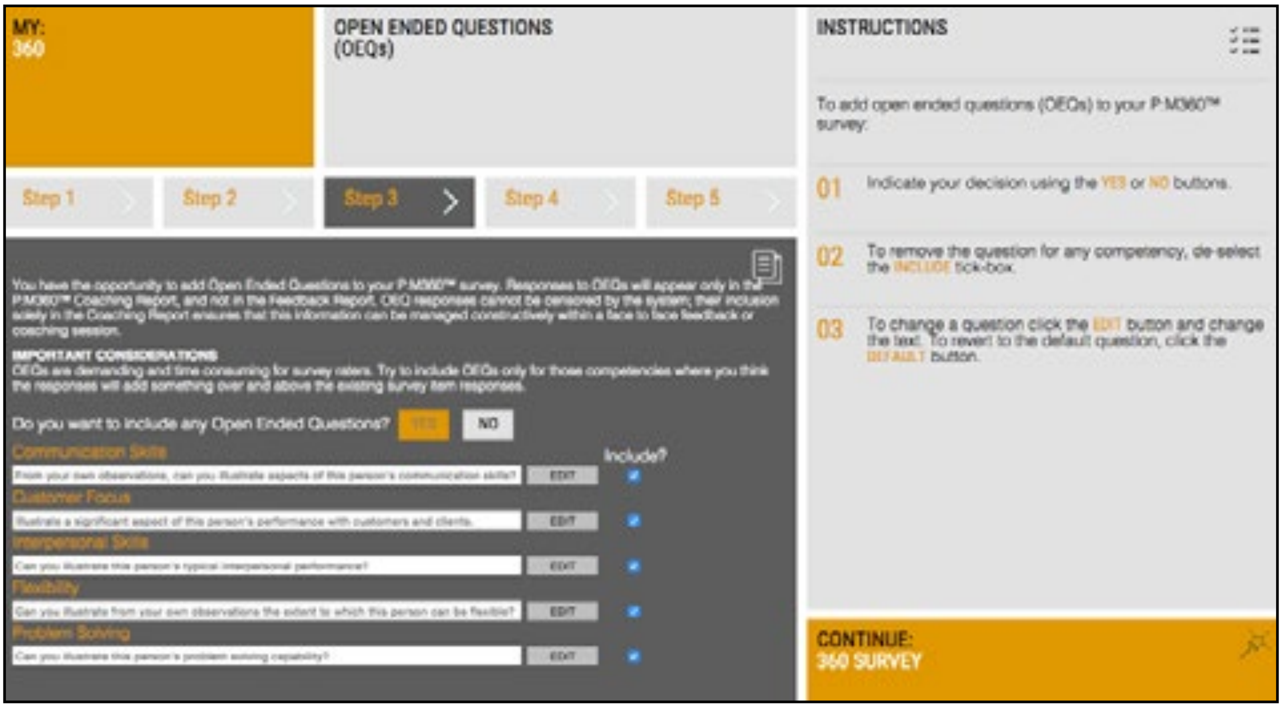


Image 5.4 – OEQs – Yes

If you wish to edit the default question or include your own question, click on the ‘Edit’ button and make the necessary changes to the field. To revert to the original question, simply re-click the ‘Default’ button. If you do not wish to include an OEQ for a particular competency, make sure the box in the ‘Include?’ column is left unchecked. When you are finished, click the ‘Continue 360 Survey’ button in the bottom right hand corner.

STEP 4 – EXTRA QUESTIONS

You can choose to give raters the opportunity to add more general comments about the candidate’s performance by asking extra questions (see Image 5.5 below). Again, responses to these questions will only appear in the Profile:Match2™ 360 Coaching Report, and not in the Feedback Report. Selecting ‘No’ will take you straight to Step 5. If you choose ‘Yes’, you will be given the opportunity to select which questions you wish to include (see Image 5.5 below).

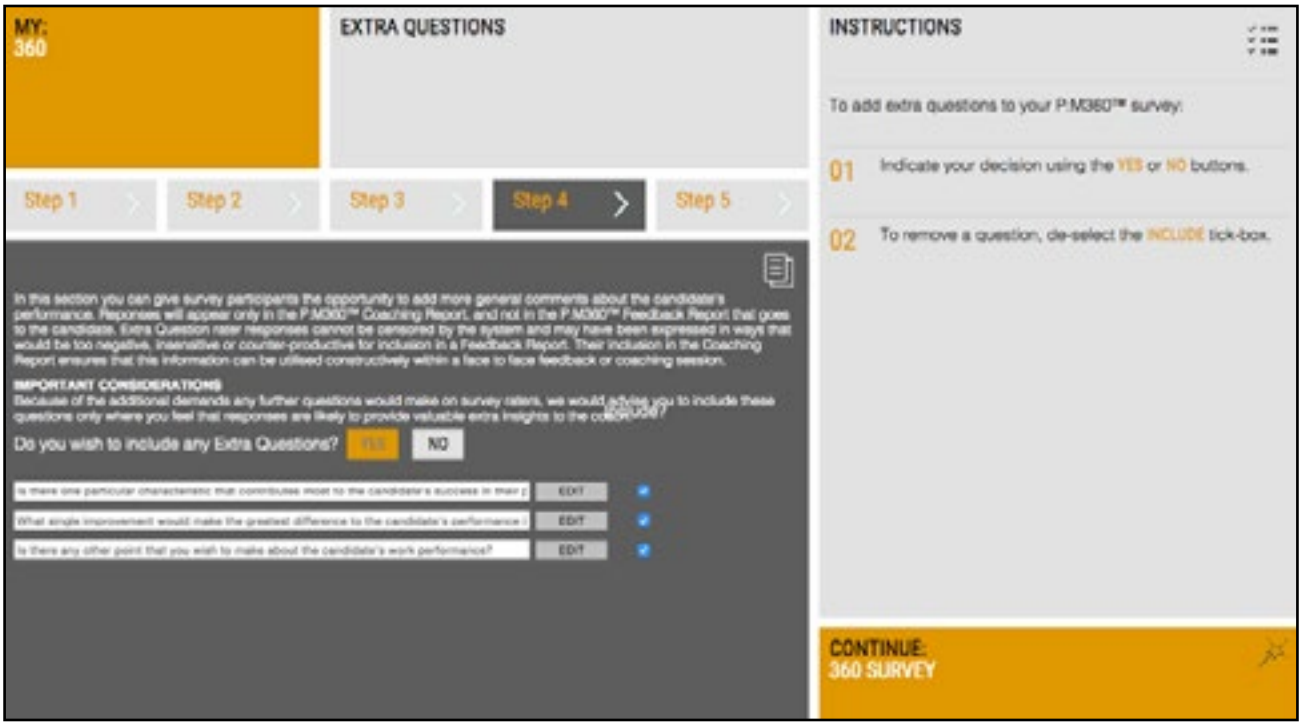


Image 5.5 – Extra questions

If you wish to amend the default question or include your own question, click on the ‘Edit’ button and make the necessary changes to the field. To revert to the original question, simply re-click the ‘Default’ button. If you do not wish to include an extra question, make sure the box in the ‘Include?’ column is left unchecked. When you are finished, click the ‘Continue 360 Survey’ button in the bottom right hand corner.

STEP 5 – SURVEY SUMMARY

The setup process has now been completed, and this screen shows a summary of the details of your survey (see Image 5.6 below). If you would like to edit any of the survey details, click ‘Step 1’, ‘Step 2’, ‘Step 3’, or ‘Step 4’ above to return to this section and edit.

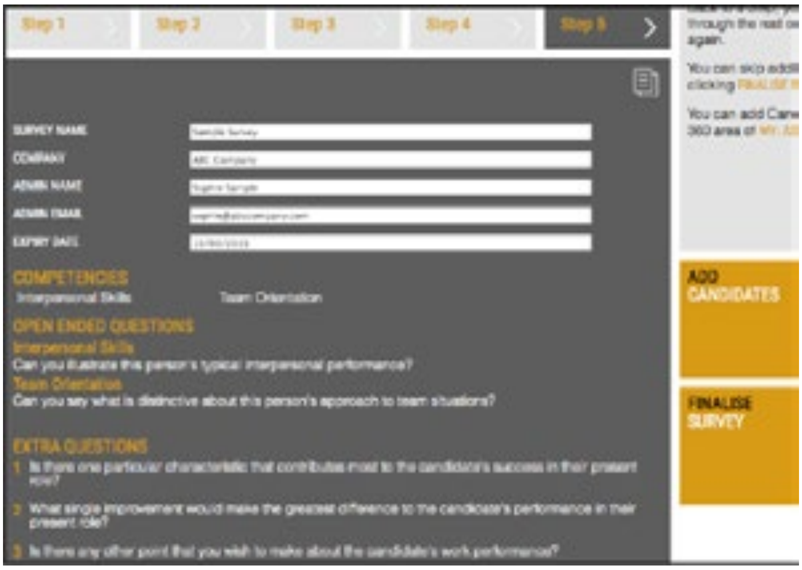


Image 5.6 – Survey summary

Finalise Survey

Clicking ‘Finalise Survey’ will give you the ‘Save Survey’ prompt shown in Image 5.7 below, and clicking ‘OK’ will return you to the Profile:Match2™ dashboard.

Once you have created a 360 survey, it can be viewed at any time by clicking on ‘My Assessments’ and then ‘My 360 Templates’, or by clicking ‘360 Surveys’ in the ‘My Assessments’ box on the dashboard.

Add Candidates

Please be aware that you can only add candidates to a 360 survey that has been saved. To add candidates directly from the ‘Survey Summary’ screen, click the ‘Add Candidates’ button on the right hand side of the screen. The same ‘Save Survey’ prompt will appear (see Image 5.7), but clicking ‘OK’ will take you directly to the ‘Add Candidates’ screen.

Image 5.7 – Save survey

ADDING CANDIDATES

The ‘Add Candidates’ screen enables you to enter the name, email address, and job level of each candidate (up to a maximum of 50 candidates per survey). Tick the ‘Manage Raters’ option if you want the candidate to manage his or her own raters. This means that the candidate will select their own raters when they log into the PsyKey assessment system to take the surveys. Alternatively, if you would prefer to manage the raters on the candidate’s behalf, leave this box un-ticked. When you have entered each candidate’s details, click the ‘Add’ button (see Image 5.8).

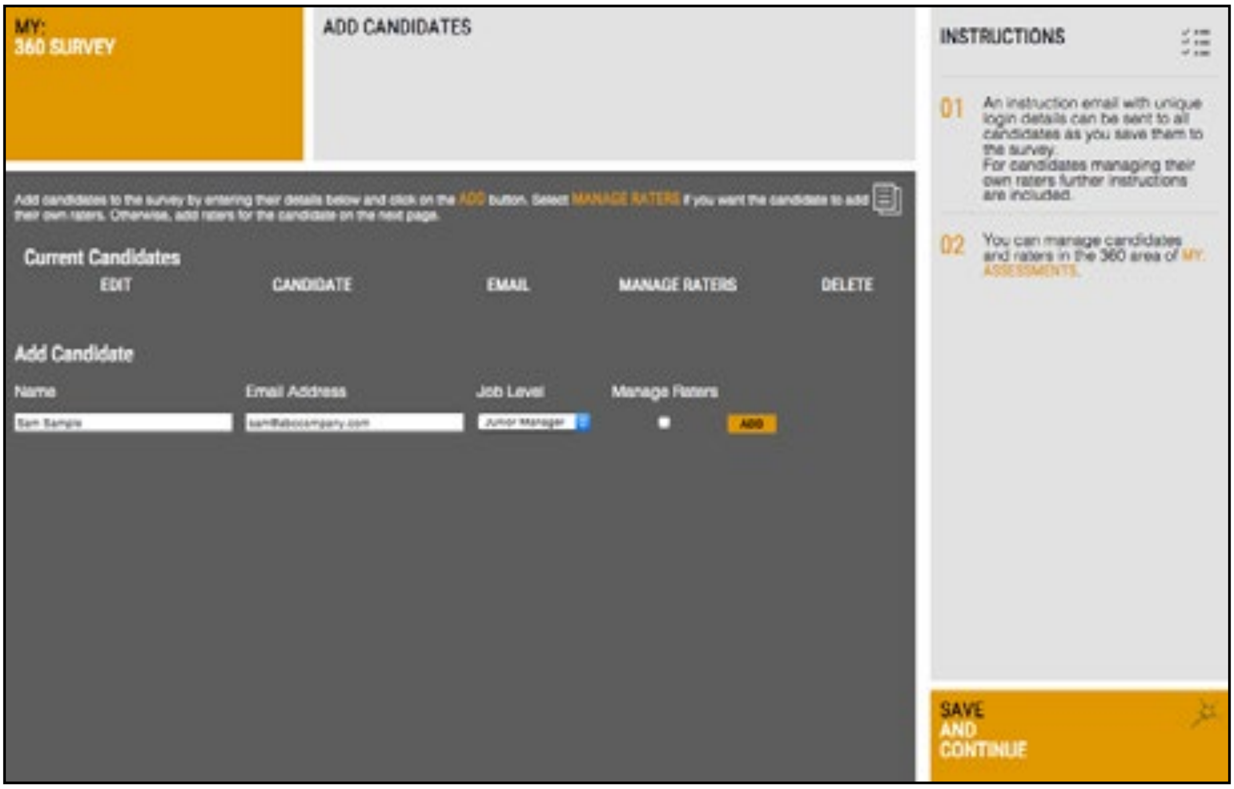


Image 5.8 – Add candidates

When you have added all your candidates, click ‘Save and Continue’ in the bottom right hand corner. Instruction emails will be sent out to your candidates as soon as they have been added to the assessment set up.

If you have selected for all of your candidates to manage their own raters, you will return to the Profile:Match2™ dashboard. If you have chosen to add raters yourself, you will be redirected to the ‘Candidates Needing Raters’ page (see Image 5.9 below).

If you have selected for all of your candidates to manage their own raters, you will return to the Profile:Match2™ dashboard. If you have chosen to add raters yourself, you will be redirected to the 'Candidates Needing Raters' page (see Image 5.9 below).

Image 5.9 – Candidates needing raters

To add a rater, click the symbol in the 'Add Raters' column to the right of the candidate. This will take you to the 'Add Raters' screen, where you will enter a rater's name, email address, and relationship with the candidate (see Image 5.10 below).

Image 5.10 – Add raters

Click the 'Add' button once the required information has been entered to include the rater in the Profile:Match2™ 360 Survey. Please note, the system will automatically include the candidate as a self rater, but you can choose to edit and/or delete them, or any other rater, by clicking on the relevant symbol.

Once all raters have been added, click the ‘Save and Continue’ button in the bottom right hand corner of the screen.

Please note, if you choose to include a Peer, Direct Report, and/or Client rater in the survey, you will need to include at least three individuals from that category before you can move onto the next stage.

Both candidates and raters are emailed their instructions and unique login details by the Profile:Match2™ system. If the candidates have been asked to manage their own raters, instructions explaining how to add raters will automatically be sent to each candidate as you add them to the survey (see Image 5.11).

Dear Sam Sample

Arrangements have been made for you to complete the following two assessments online:
PROFILE:MATCH™
PROFILE:MATCH™ 360

Quick guide to taking the assessment

1) Go to http://www.psy-key.com/PM360

2) If prompted, please enter the details below.

Access Code: 573-20834
User Name: Sam@abccompany.com
Password: RSp46dgX0

3) Follow the on-screen instructions

Each Assessment should take between 10 to 20 minutes so please ensure that you have sufficient time to devote to uninterrupted completion.

In the unlikely event that you encounter any error messages when taking a test please visit our online FAQs at: http://www.psy-key.com/help/

We recommend that you complete this assessment using a desk top or lap top computer. Although it is possible to use some tablets and smart phones, technical specifications vary widely and technical functions may be compromised on some of these devices.

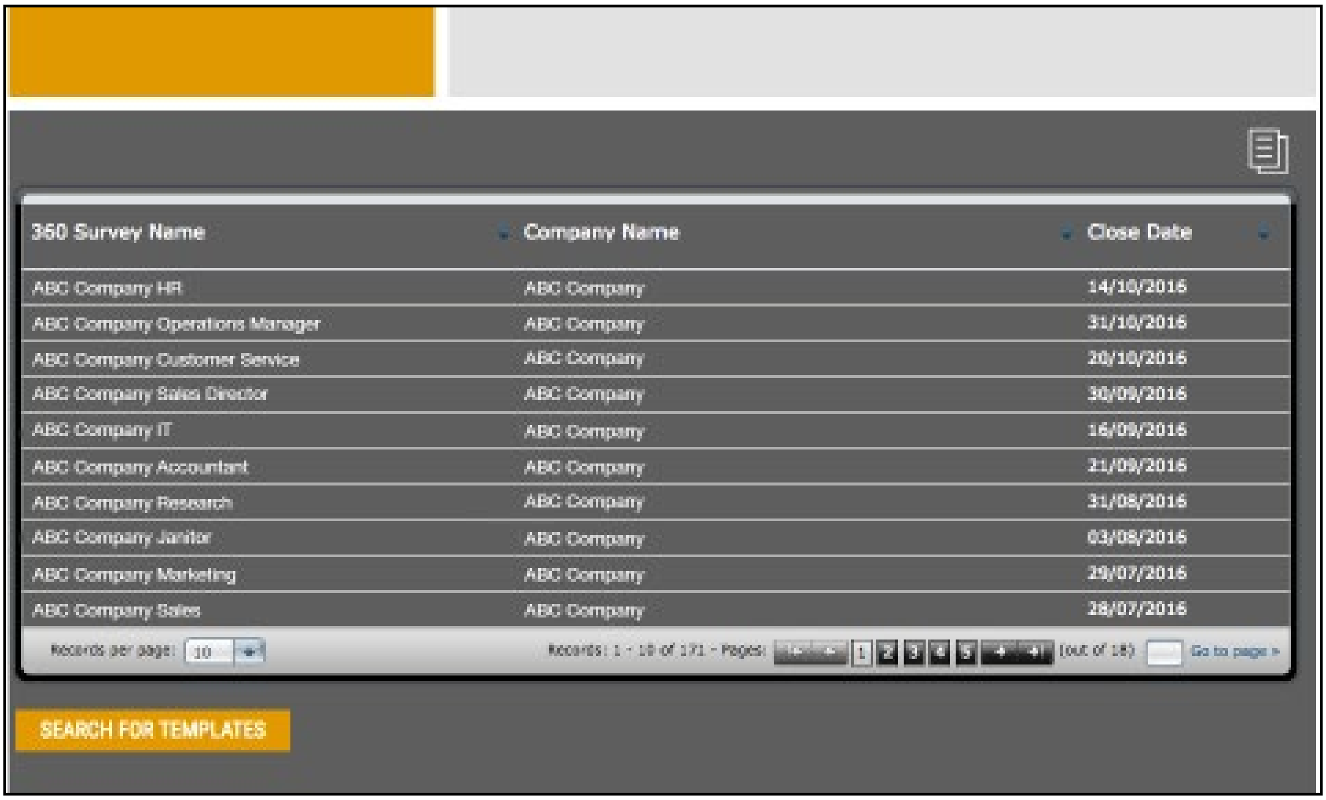
Kind regards
PROFILE:**MATCH**™ Administration
+44 (0) 1892 559 540

Image 5.11 – Example of a candidate email

Profile:Match2

EDITING YOUR PROFILE:MATCH2™ 360 SURVEY

Once you have created and saved your Profile:Match2™ 360 Survey, you will be able to access and edit it from the 'Edit Survey' screen. Clicking 'My Assessments' in the main toolbar and selecting 'My 360 Templates', or clicking '360 Surveys' in the 'My Assessments' box on the dashboard, will take you to the 'Existing Surveys' screen (see Image 5.12).



360 Survey Name	Company Name	Close Date
ABC Company HR	ABC Company	14/10/2016
ABC Company Operations Manager	ABC Company	31/10/2016
ABC Company Customer Service	ABC Company	20/10/2016
ABC Company Sales Director	ABC Company	30/09/2016
ABC Company IT	ABC Company	16/09/2016
ABC Company Accountant	ABC Company	21/09/2016
ABC Company Research	ABC Company	31/08/2016
ABC Company Janitor	ABC Company	03/08/2016
ABC Company Marketing	ABC Company	29/07/2016
ABC Company Sales	ABC Company	28/07/2016

Image 5.12 – Existing surveys

Clicking the symbol in the 'Edit' column to the right of the relevant survey will then take you to the 'Edit Survey' screen (see Image 5.13 below). From this area, you will be able to view and edit the details of the survey, candidates, and raters, as well as generate reports.

The 'Edit Survey' screen includes the survey name, company name, and expiry date of the survey, as well as additional details about each candidate in the Profile:Match2™ 360 Survey. See below for more information on each of the options.

Image 5.13 – Edit survey

Show Competencies
Clicking this button will show which competencies were selected when the Profile:Match2™ 360 Survey was created.

Open Ended Questions
Clicking this button will show the open ended questions included in the Profile:Match2™ 360 Survey (if these were chosen when creating the survey).

Extra Questions
Clicking this button will show the extra questions included in the Profile:Match2™ 360 Survey (if these were chosen when creating the survey).

Group Email
Clicking this button will send each of the candidates an email with instructions outlining how to complete the Profile:Match2™ 360 Survey.

View and Edit Candidate Information
Click the symbol in the ‘Edit’ column to the left of the candidate to view and edit their information (see the ‘Edit Candidate Details’ section below).

Status PM
This is the status of the Profile:Match2™ questionnaire taken by the candidate, and shows whether the survey is ‘Not Started’, ‘Pending’, or ‘Complete’.

Status 360
This is the status of the Profile:Match2™ 360 Survey taken by the raters, and shows whether it is ‘Not Started’, ‘Pending’, or ‘Complete’.

Manage Raters
If this option was selected when the survey was set up, each candidate will manage his or her own raters. If this option was not selected, you will need to add raters for your candidates. Please note that even if a candidate is managing their own raters, you will still be able to view rater information and add new raters.

Raters
This is the number of raters that have been added for each candidate. To view rater information, you will need to click the ‘Edit’ symbol to the left of the candidate (see ‘Edit Candidate Details’).

Generate Report
When candidates have completed the survey, click this button to generate a report (see the ‘Generate Reports’ section below).

Resend Candidate Instruction Email
Click on the symbol in the ‘Email’ column to the right of the candidate to resend the Profile:Match2™ 360 Survey instruction email. This contains the unique login details required by the candidate to complete the survey and the instructions about identifying raters (if the candidate is adding their own raters).

Delete
Click on the symbol in the ‘Delete’ column to the right of the candidate to remove the candidate from the Profile:Match2™ 360 Survey.

EDIT CANDIDATE DETAILS

Clicking the symbol in the ‘Edit’ column to the left of the candidate will take you to the ‘Edit Candidate Details’ screen, where you can edit the candidate’s name, email address, age, gender, and ethnicity (see Image 5.14). Please note, this screen also allows you to add additional candidates and edit candidate details after the survey has been created. See below for more information on each of the options.

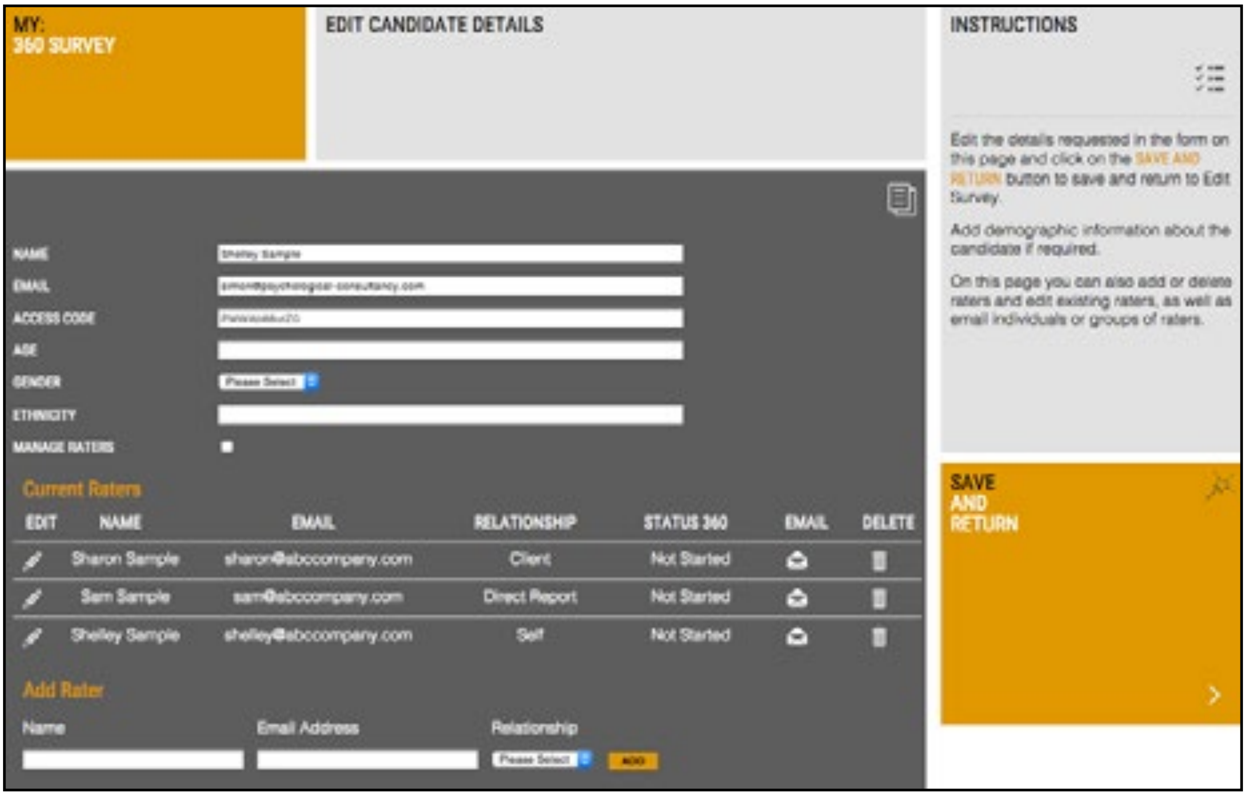


Image 5.14 – Edit candidate details

Manage Raters

If this option was selected for a candidate when the survey was created, that candidate will manage his or her own raters. If this option was not selected, you will need to add raters for each of your candidates. Please note that if a candidate is managing their own raters, you will still be able to view rater information and add new raters.

View and Edit Rater Information

Clicking the symbol in the ‘Edit’ column to the left of the rater will take you to the ‘Edit Rater Details’ screen, where you can view and edit the rater’s name, email address, age, gender, and relationship to the candidate.

Relationship

This column demonstrates the rater’s relationship with the candidate, and highlights whether they are a ‘Manager’, ‘Peer’, ‘Direct Report’, or ‘Client’.

Status 360
This is the status of the Profile:Match2™ 360 Survey, and shows whether the survey is 'Not Started', 'Pending', or 'Complete'.

Resend Candidate Instruction Email
Click on the symbol in the 'Email' column to the right of the candidate to resend the P:M360™ Survey instruction email. This contains the unique login details required by the candidate to complete the survey, and instructions about identifying raters (if the candidate is managing their own raters).

Deleting Raters
You can delete a rater from the 360 process by clicking on the symbol in the 'Delete' column to the right of the rater.

Adding Raters
To add a rater, input their name, email address, and relationship to the candidate, and click the 'Add' button. Even if the candidate is managing their own raters, you can still add raters yourself.

GENERATING REPORTS

To generate a report for a candidate, go to the ‘Edit Survey’ screen and click the symbol in the ‘Generate Report’ column to the right of the candidate. This will take you to the ‘Generate 360 Reports’ screen (see Image 5.15), where you can select which raters to include in the generated report by ticking the box in the ‘Include’ column to the right of their name.

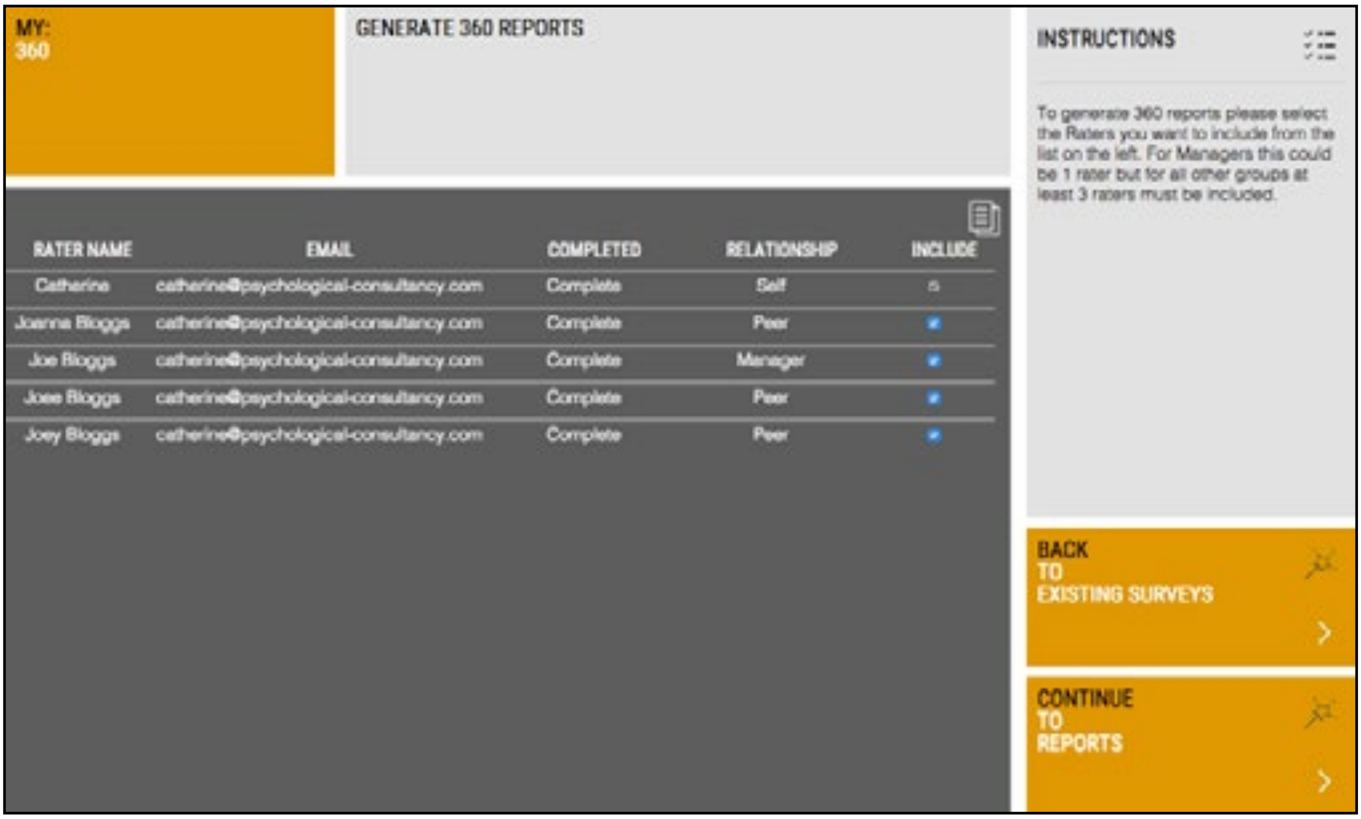


Image 5.15 – Generate 360 reports

Once you have selected your raters, click the ‘Continue to Reports’ button in the bottom right hand corner of the page.

A prompt will ask if you want a ‘Feedback’ report or a ‘Coaching’ report (only available to those with confirmed experience or training). Please note, if the report option was not included in the original configuration for the template you can create one here for an additional fee.

Once selected, the Profile:Match2™ system will generate a downloadable PDF of your desired 360 report.

360 Reports can also be generated from the ‘My Usage’ screen (see Image 1.8 in Section 1). You can locate the desired report by searching for the candidate’s name, or by the date in the assessment was completed. To view the report, simply click on the candidate’s name and follow the onscreen instructions. Please note, if the report option was not included in the original configuration for the template you can create one here for an additional fee.