



The Career Motivation Indicator

Using the CMi Website

Stuart Robertson & Associates Ltd

Index

Introducing CMi	3
How does the basic process work?	3
How can I manage my account on the CMi Website?	4
What are the step-by-step procedures?	4
To register	4
To log in to the CMi Website	4
To set up a new respondent	4
To delete respondents	5
To set up a new folder	5
To generate a report	5
CMi Website: Screenshots	6
To order more units	7
To change your password	7
To change your invitation email	7
To log out	7
Terms of use for CMi Account Holders	8
Contact Details for SR&A	11

Introducing the CMi Website

In development for a period of approximately three years, CMi was published in its final release form in December 2008. This version includes 80 questionnaire items with the potential to provide scores on 10 basic Career Motivators and 4 Global Career Themes. It is intended for use in career counselling, transition, or management development situations where a grasp of the individual's primary career motives may help in exploring the suitability of differing career options or development directions. It was launched on line in January 2009 at www.careermotivation.co.uk where CMi Users can open and manage an account for use of the questionnaire with their own clients and where the questionnaire can be completed by respondents on a pay-as-you-go basis.

Basics

- To become a CMi User, you first need to obtain a username and password for entry into the website. This involves contacting us and completing a registration form – in so doing you will need to agree to the terms of use for CMi which are reprinted at the end of this User Guide. Call us on 0161 877 3277 to take this step, or download the relevant forms from our website at www.sr-associates.com/career_indicator.html and fax them to us at 0161 877 4500.
- You can then log into your account by entering the CMi website at www.careermotivation.co.uk and by typing in your username and password in the appropriate fields for 'Adviser'. Note that the CMi site has been designed to work with Microsoft's Internet Explorer Version 7 or later, and with Mozilla Firefox Version 1.5 or later on a Windows based PC. We cannot guarantee the effective operation of all of the site's scripts and programming code with other browsers such as Netscape or Safari, or on Mac based systems. As a result we strongly recommend that you avoid using other browsers and platforms, as they can produce unwanted and unpredictable results.
- The site is easiest to use at a resolution of 1024x768 with normal sized fonts (96 dpi), so if you find that the site does not appear properly you should change the resolution settings to these for effective use.
- From your account, you can create a 'new respondent' by typing in your candidate's name details, gender and email address - this automatically generates an email invitation to complete CMi which you can send to your respondent. You can tailor the email to include your name and contact details, and save the edited version.
- Your respondent is emailed an invitation and an access code with a link to our CMi website at www.careermotivation.co.uk which they can use to complete the questionnaire. Respondents occasionally have problems navigating the site, depending on their PC and software set up. As a result you may need to make them aware of the points mentioned above about browser and resolution settings. The site does not use cookies, and it is safe to allow it to enable pop-ups – such as the final CMi report!
- When they have completed the questionnaire, your account is updated and debited with the unit cost of an administration (1 unit). By doubleclicking on the respondent's name you can opt to 'View Report' which will be produced in Pdf format in a separate window. The report can be printed, saved, and/or emailed to your respondent as per your agreement with them. Each report is charged to your account as a unit on a once-only basis, so that if you want to come back to the respondent at another time and regenerate a report you will not be charged for the service. Until you archive or remove the respondent from your account, they can also login with their original access code and download a copy of the report.
- When you have completed work with the respondent, you can 'Archive' or 'Remove' them from your account. Both close the respondent details from access, while 'Remove' also deletes them from the system.

How can I manage my account on the Quintax User Site?

You can:

- Create folders for different groups of respondents, and move respondents between folders
- Select completed respondents for archiving or removal from your account as desired
- Monitor the invitations you have made and whether/when they have been accepted or declined
- Edit and save the content of your invitation email
- Edit a specific email without affecting the default
- If you prefer, use your own email address for a respondent so that you can have them complete CMI in your own office
- Edit name and email address details regarding respondents
- Order usage credits or units on-line and monitor your usage
- Monitor the reports you have created for each respondent
- Save and print reports
- Re-create reports free of additional charges
- Change the password on your account

What are the step-by-step procedures?

To register and use CMI:

- Call SR&A on 0161 877 3277 or email mail@sr-associates.com and to arrange for an account to be set up and for usage units to be added to it. By default we open the account with 10 usage units – enough to assess and report on 10 people, but you can order more if you prefer. We will ask you to complete a registration form and you will need to agree to the terms for use of CMI at the end of this Guide. See our corporate website at www.sr-associates.com for details of current pricing for set up and units.
- You will need the following hardware/software configuration:
 - A PC running Windows XP or later
 - Internet Explorer (Version 7 or later) **or** Firefox Mozilla (Version 1.5 or later)
 - Adobe Acrobat reader (Version 7 or later)
 - A screen preferably operating at 1024x768 resolution with normal sized fonts (i.e. 96 dpi).

To login to the CMI site:

- Point your browser at www.careermotivation.co.uk and press 'Enter' to reach the site
- Press the 'Enter' key to gain access to the site
- Key in your username and password details (assigned by SR&A) and press 'Enter'

To set up a new respondent:

- Click on the 'Respondents' menu and then on 'New Respondent'
- Fill in the details of the respondent's name, gender, and email address and click 'OK'

- An email will appear containing the respondent's access code and addressed to them from administrator@careermotivation.co.uk and you can edit the contents of this. It is wise to ensure that the default email invitation contains your contact details so that the respondent knows who has emailed them. You might also want to warn them that they should try to ensure that their spam detector (if they have one) will treat the CMi domain name as a valid for email receipt purposes
- If you check with your respondent and find that for some reason they have not received the email, you only need to give them their access code and the web link to www.careermotivation.co.uk to ensure that they can visit the site and complete CMi successfully.
- When the invitation has been sent the respondent will be added to your account as a line of information including their name and email address together with an icon. The main icons of importance are as follows:
 - Yellow envelope – invitation sent successfully
 - Person with blue jumper – CMi completed successfully
 - Red envelope – respondent has visited site but not yet completed CMi (they may have submitted some biographical details about themselves)
 - Person with purple jumper – respondent has been archived and the record has been closed so that the report can no longer be viewed

To delete or archive respondents:

- check (by clicking) the selection box beside each of the respondents you wish to remove
- each selection box should now contain a tick - click a respondent again if you wish them to be de-selected
- when you have identified and checked the respondents you want to remove, click the 'Respondents' menu, followed by 'Selection' and click either 'Archive' or 'Remove' as desired. Note that both close the record so that you cannot access the respondent's report, while 'Remove' deletes them from the database
- *note:* you can 'Select All' or 'Deselect All' respondents by clicking specific menu items and then confirming

To set up a new folder:



- you may want to place some of your respondents together - perhaps because they are relevant to a particular workshop, or selection exercise, or department/company
- click on the 'Folders' menu
- click on 'New Folder'
- insert a name for the folder (and a description if desired) and click 'OK'
- you can now create new respondents in this folder
- notice that while it is possible to move respondents between folders it is not possible to delete folders once they exist as they are not equivalent or similar to typical Windows folders

To generate a report:

- when a respondent has replied to your invitation and completed CMi, their name on the respondent list will be accompanied by the blue jumper icon described above
- *note:* a respondent recorded as a purple envelope may have started their administration but have been forced to break off for some reason. You may need to contact them to discuss things, as they will need to start the questionnaire again and finish it off so as to have a full scoreable data set on the site
- double click on the respondent's name to bring up a panel describing the status of the respondent
- click on 'View Report' and the Pdf version of the report will be generated in a separate window – it can be saved or printed from here
- when the respondent completes the questionnaire, your unit counter will decrement by one unit

CMi Screenshots

Entry Screen



Welcome to the Career Motivation Indicator website.


The purpose of this site is to help you to explore your career motivation.

Career motivators help determine the extent to which you gain satisfaction from the type of work you do.

Your most important motivators indicate those aspects of your needs that must be met in order for you to feel satisfied and fully effective in your work. Knowing your own career motivators can help you in making decisions about your future career.



For further information on CMI please visit: http://www.sr-associates.com/career_indicator.html

Please click on the button below to enter the CMI site.



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Account Management Screen



Account Folders Respondents Help Log out

User: **Janey** | Credits: 1 | Folder: **Main**

All Completed Recent Archived

	Status	Last Name	First Name	Email	Invited	Login code	Last Login	Visits
1	<input type="checkbox"/>	Robertson	Stuart	stuart@sr-associates.com	23/01/09 13:55	NXUAKYGBC	23/01/09 17:19	4
2	<input type="checkbox"/>	Anycandidate	Sam	stuart@sr-associates.com	23/01/09 15:16	RMY2QPUXF	23/01/09 17:24	3
3	<input checked="" type="checkbox"/>	Robertson	Stuart	stuart@sr-associates.com	21/01/09 14:22	NDRXNHMJY	23/01/09 13:59	3
4	<input type="checkbox"/>	Barker	Barry	stuart@sr-associates.com	23/01/09 17:04	KXPERSKZN		0

To order more Units:

- go to the 'Account' menu and click on 'Request credits'
- select the number of units you wish to order and 'Send Request'
- if you are a new customer, your account will not be equipped with credit facilities and therefore your request will be emailed to SR&A for review. We will contact you regarding payment arrangements and then credit the account as requested.
- If you are an existing customer, your account will be set up with credit facilities and therefore your request for credits will cause them to be updated immediately. SR&A will invoice you for the unit charges involved.
- In some circumstances your 'Credits' may run out while you are on site. If this happens, you may generate a debt (negative credits) when respondents complete the questionnaire as requested – this will be counted against your next order when you make it. You remain liable for all units ordered whether your account is in debt or not! If an invitation to complete CMi has not been taken up and for some reason becomes unwanted/out of time etc., then it is very wise to send an explanatory email and then 'Remove' the relevant respondent from your account. This is because otherwise the respondent can complete CMi and cause your account to be charged accordingly, when it just might be that you do not want this to happen!

To change your Password:

- go to the 'Account' menu and click on 'Change password'
- type in your old password, your new password, and repeat your new password to confirm its accuracy
- click the 'Change Password' button
- your change of password will be confirmed

To change your Invitation Email:

- go to the 'Account' menu and click on 'Edit email'
- this brings up the email which the site will send to your respondents when you request them to complete CMi - you may edit it freely
- *note*: be sure to leave the references in double curly brackets untouched, (e.g. {{references}}), as otherwise your respondents may not be able to navigate successfully to the CMi site
- to save changes you make to the invitation email click on 'Save'. The saved version will now come up as the default invitation when you create your next respondent
- we recommend that you add your contact details to the invitation email (eg by overwriting 'CMi System Administrator' with your own name and by adding your telephone number) in the event that respondents wish to raise any queries with you directly before they complete the questionnaire
- *note*: the invitation email is presented as coming from you, but with an email address equivalent to administrator@careermotivation.co.uk - as a result you may need to warn respondents of this in case they need to make any adjustments to spam filters etc. Because the Internet is not a perfect communication medium it pays to check your account occasionally so as to see if your respondents are completing CMi at the appropriate rate/time, as it may indicate a blocked invitation. As has been said before the respondent only needs to know his/her access code and the web address of CMi to complete successfully. These details can, when needed, be sent by manual email or telephoned to your intended respondent.

To log out:

- click the 'log out' command on the main menu
- alternatively, close your browser (or browser tab), either from the File menu ('Close') or from the close button in the top right hand corner of the browser window (or tab)
- or click in the browser address bar at the top of the screen and type in a new web address to which you can navigate

SR&A Terms of Use For Career Motivation Indicator ('CMi') Account Holders

Definitions

CMi is a questionnaire measure of Career Motivation designed, developed and published exclusively by Stuart Robertson & Associates Ltd (otherwise referred to as SR&A in these terms), Empress Buildings, 380 Chester Road, Manchester M16 9EA, UK (Tel: +44 (0)161 877 3277; Fax: +44 (0)161 877 4500).

The CMi website is an Internet based version of the CMi questionnaire, and comprises an automated system for administering, scoring, and generating interpretive reports via the www.careermotivation.co.uk website.

CMi Users are those people who have been granted the right to use CMi via the website on an independent basis, and have registered their details with SR&A for this purpose. CMi Users are permitted to invite individuals (referred to as respondents in these terms) to complete CMi for relevant purposes (for instance in career counselling or transition situations). They are also permitted to generate CMi reports and to use these in the context of their professional work with individual respondents.

Ethical Use

SR&A expect CMi Users to employ high ethical and professional standards when utilising the services available through the CMi website. This normally includes

- giving an appropriate introduction or pre-assessment briefing to respondents so that they know what to expect of the assessment process
- the provision of relevant feedback to respondents, so as to
 - validate the assessment through discussion
 - to discuss/develop its implications and other purposes with the respondent

Users should recognise that CMi has been designed to very high scientific standards, but that like all questionnaire based assessment it is not infallible. In part it depends for its validity on the accuracy and frankness of respondents, and as a result the feedback process represents an important part of the 'added value' of completion both for the User and for the respondent.

SR&A will investigate any evidence that Users are utilising the site in an unprofessional or unethical manner, and will take appropriate action (e.g. by terminating use of the site and/or the User status of the person concerned) where necessary.

Copyright/Intellectual Property

The content, information, displays, programs, processes, systems, products, and services in this website (referred to in general as the content of the site) are exclusively owned by SR&A and are protected by copyright and other intellectual property laws. All intellectual property rights in the content of the site belong to SR&A.

Users may not

- copy, reproduce, modify, distribute, republish, download (except where specifically allowed in the production of CMi reports), publicly display, transmit or create derivative works from the content by any means, including but not limited to electronic, mechanical, photocopying, recording or otherwise.
- reverse engineer, de-compile or disassemble any of the products or services herein for any purpose, or mirror any of the material contained in the content of this site, whether in electronic or other form.
- lead or encourage any other person or organisation to do either of the above

Other than SR&A, no person using this site may sell, rent, lease or otherwise transfer the services of this site to another person or organisation. CMi Users gain use of the site by purchasing Units from SR&A in order to employ its services.

Personal data recorded and produced by the site is stored by SR&A securely under the terms of the Data Protection Act (1998). Apart from the research and account management uses relating to anonymous group results mentioned below, this data is not released, copied or otherwise transferred to any third party. Our use of this data is governed by our privacy policy which may be read by following the appropriate link on the home page of www.sr-associates.com, our corporate web site.

Research

SR&A reserve the right to conduct research on stored data so as to improve the validity, fairness, and usefulness of the CMi assessment system for both respondents and CMi Users. Such research is conducted with all personal identifying information removed from the data so as to guarantee the anonymity of respondents and to ensure that attention is focussed on group statistics rather than individual results.

Age, gender and other data are collected optionally from respondents for purposes of monitoring and research as described above. Information we collect regarding the age, gender, or other personal details of respondents via the CMi web site is not used or recorded in a form that is accessible to CMi users, i.e. those who are authorised to invite respondents to complete the questionnaire, generate reports, etc. Name details only are presented on the CMi report facing page so as to ensure correct identification of the respondent.

SR&A may accept commissions to conduct statistical analysis of group results within organisations where there are authorised CMi users. However, SR&A will not release personal data, or information regarding individual respondents in these cases.

Website and CMi Account Management

SR&A consultants are responsible for managing the CMi website and its User accounts, the creation of new accounts, usernames and passwords, the allocation of Units ordered by users and related invoicing, and in general for the efficient operation of the site to ensure user satisfaction. All information regarding individual accounts obtained by SR&A consultants in discharging this responsibility is treated in confidence with respect to individual users and is not released to any third party unless exceptional conditions prevail (e.g. request by law, legitimate and agreed substitution of one CMi User by another, etc).

In certain cases SR&A may agree to set up group based accounts in which a variety of individual CMi users from one client organisation or company may be grouped together for purpose of monitoring usage and invoicing arrangements. In these cases statistics related to unit consumption and account usage may be released for management purposes to the relevant resource manager in the client organisation. No release of information regarding individual respondent profiles will be permitted under such arrangements.

In some cases, SR&A may agree to the appointment of administrators within a client organisation who will have the role of supporting users in the day-to-day management of their account activity. Their role will involve generating invitations, following up incomplete assessments with respondents, and producing reports for consultant use. They must not be allowed to become involved in independent assessment of people (for example in creating invitations not specifically requested by consultants) or in any aspect of report feedback or interpretation. The administrators so appointed will be trained in the ethical and professional aspects of the account administration by SR&A, and their conduct will be kept under review both by the resource manager in the client organisation and by SR&A.

SR&A reserve the right to disable and close accounts which have become disused for a period of at least 24 months since the previous last unit usage. In such cases any remaining units in the account will be cancelled against the administration costs incurred by SR&A in maintaining the availability of the account during the previous period. A closed account may only be re-opened by contacting SR&A with an appropriate request and unit order.

Payment Terms

Account activity is funded by ordering units or credits directly from SR&A or on-line. A unit enables the administration of CMi to one respondent and the production of 1 report. CMi users may be registered with pre-payment or credit based accounts. In the former case, orders for units etc. must be paid for in full before the units will be credited to the user account. In the latter case any units ordered through the account will be delivered directly and subject to payment by invoice on 30 day terms. Failure to pay an invoice in the time allowed will result in the account being disabled until the situation is rectified. Users of either account are liable for the cost of units ordered together with the cost of any negative units that might arise in day to day use when respondents complete CMi by invitation when the user account has a zero credit. Any negative units will be cancelled against any fresh order, or invoiced directly according to SR&A's discretion.

Service Warranty

SR&A warrants to the original purchaser of the CMi website service that it will provide a means of administering and scoring the CMi questionnaire to respondents via the Internet, and that it will provide, where complete and accurate data have been obtained, a report output summarising the scores of the respondent assessed. This warranty is void if a service failure occurs because of accident, abuse,

misapplication, inappropriate use of the service, or because of Internet failures outside the responsibility of SR&A.

Where a service failure has been demonstrated to be the responsibility of SR&A, the exclusive remedy shall be, at SR&A's option, either (a) replacement of the service via the provision of additional purchasing Units or (b) a refund of the price paid for the Units lost in the service failure (if any).

Notwithstanding the above, in certain circumstances SR&A may additionally make a goodwill offer of the use of paper and pencil completion of CMi, Bureau scoring and report generation etc., in order to mitigate the effects of a service failure.

For this warranty and remedy to apply the service failure must be reported within the Warranty Period of 10 business days. Under no circumstances will SR&A be liable for any consequential or incidental damages whatsoever arising out of the use or inability to use the content or services of this site, including without limitation local computer failure, work stoppage or any other damages, even if SR&A has been advised of the possibility of such damages.

As a CMi User, you assume full responsibility for your specific use of the site and you expressly acknowledge that SR&A disclaims any and all liability for your use of its content and services. SR&A's total liability following any service failure shall in no event exceed the actual price paid for the Units lost (if any).

This agreement is governed by the laws of Great Britain and Northern Ireland. If any provision of this agreement is found to be invalid by any court having competent jurisdiction, the invalidity of such provision shall not affect the validity of the remaining provisions of this agreement, which shall remain in full force and effect.

Agreement to Terms of Use for CMi

Please note that by requesting that a CMi User account be opened in your name, you are agreeing to the above terms of use for the CMi website listed above.

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Contact Details

You can contact us at:

Stuart Robertson & Associates Ltd
Empress Buildings
380 Chester Road
Manchester M16 9EA

Telephone: +44 (0)161 877 3277

Fax: +44 (0)161 877 4500

Web: www.sr-associates.com

Email: mail@sr-associates.com