Motivational Maps Administrator Console

User Manual

June 2012 V1.0

THE ADMINISTRATION SYSTEM

The Basics

Introduction

The operating system illustrated in this manual is a WINDOWS VISTA operating system. Previous or later versions of the windows operating system may differ in operation. If you do not operate Windows Vista and do not know how to add a URL to favourites, use the help feature within your operating system.

Whilst logged on to the system, you are accessing the Motivational Map database live over the internet. Therefore any changes made are not being made on your computer or hard drive. Accessing the database over the internet may sometimes result in a small delay whilst data is transferred.

The URL for the administration system is:
http://admin.motivationalmaps.com

The URL for the questionnaire system is:
http://portal.motivationalmaps.com

The questionnaire system is very simple and rarely experiences problems. Some common errors that can occur are:

The problem	Possible cause
The password entered is not allowing access to the system	An error message will show if the password entered has not been activated. If you have not printed or emailed the password, check that you have activated it as this may be the cause of the problem
The system will not allow me to progress past the initial information screen	Some elements of the information screen are mandatory, therefore the system will not allow you progress to the questionnaire unless the following fields have been completed
The system will not allow me to progress beyond the questions page	All questions have to be answered, if the system is not allowing you to progress it may be that you have not answered all of the questions. Scroll up the page to see if any questions are highlighted with a red asterix, this means they have not been answered.

If however you experience a difficulty whilst a person is attempting to complete the questionnaire, please contact us immediately with the following information:

- What has occurred?
- How many people were potentially accessing the questionnaire from your location?
- Did you have an error message displayed? Wherever possible please send a screen shot of the error message.
- Was there a delay in displaying an error message or did the computer Hang/Crash?
- Date and time the system was being accessed.
- Location of access to the database.
- Specify the browser type and version number, e.g. Google, Safari, Firefox etc
- Operating system being used.

System Settings

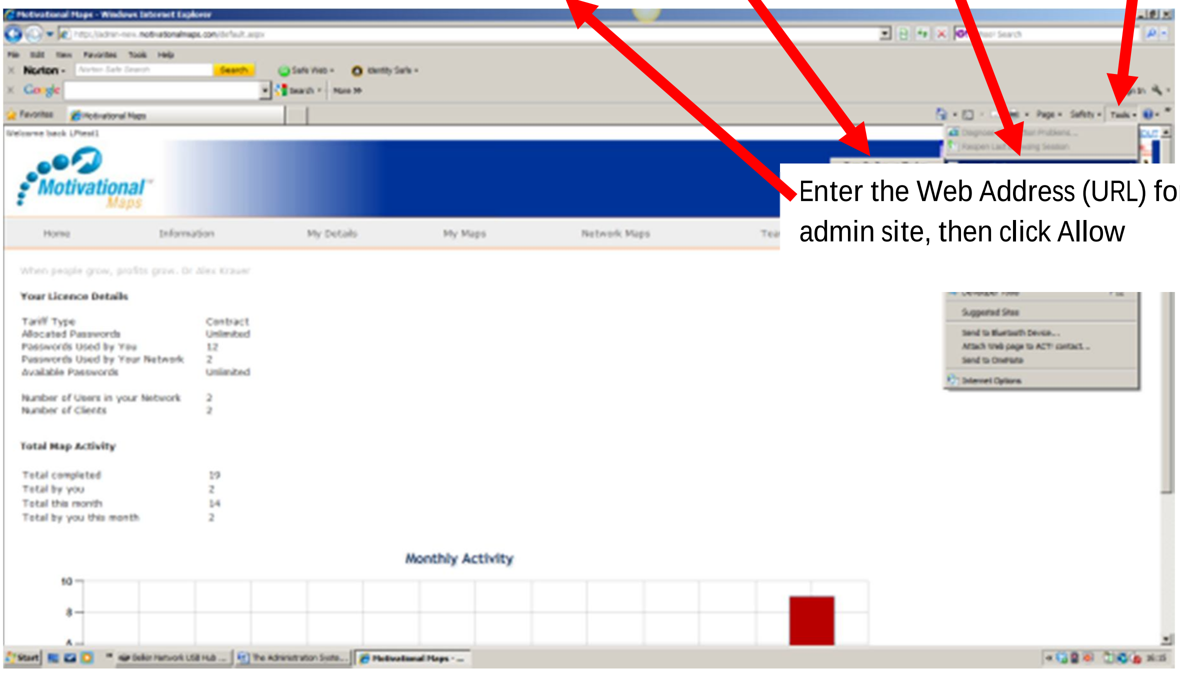
Pop Ups

To enable you to access the reports and print password documents, pop ups will need to be enabled. Go to **Tools** , select **Pop Up Blocker** and choose **Pop Up Blocker Settings**

3rd Click **Pop-up Blocker Settings**

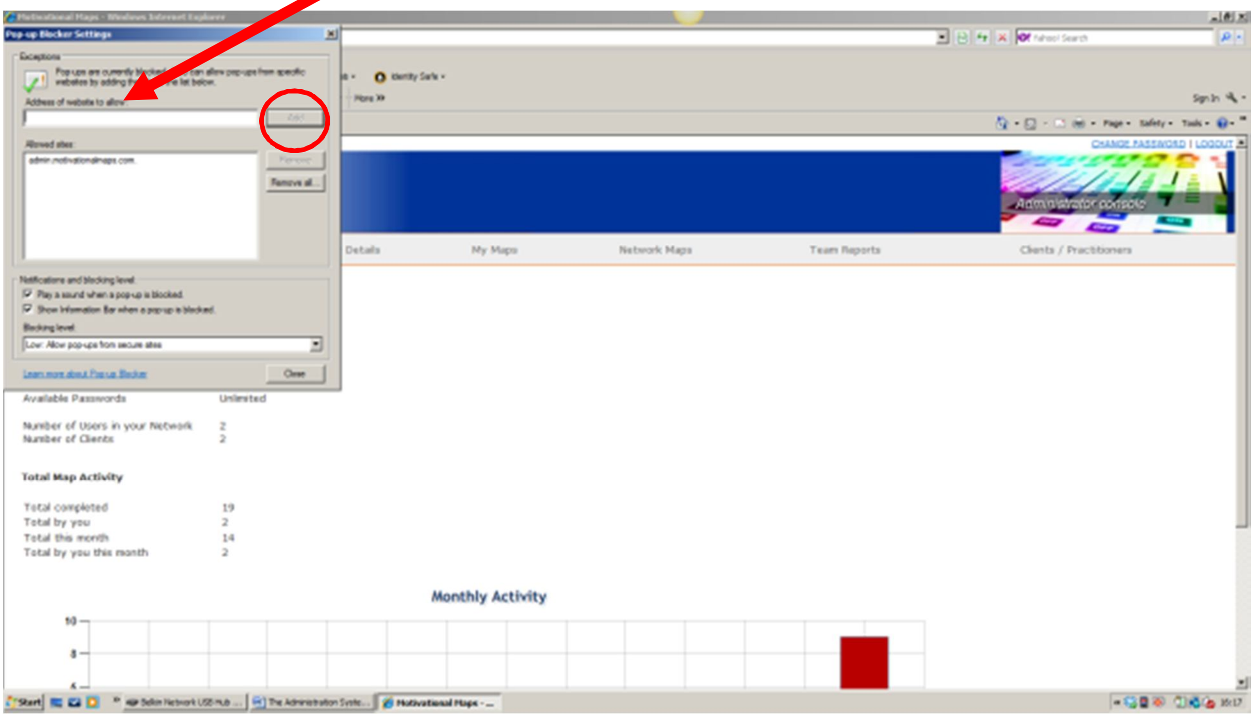
2nd Click **Pop-up Blocker**

1st Click **Tools**

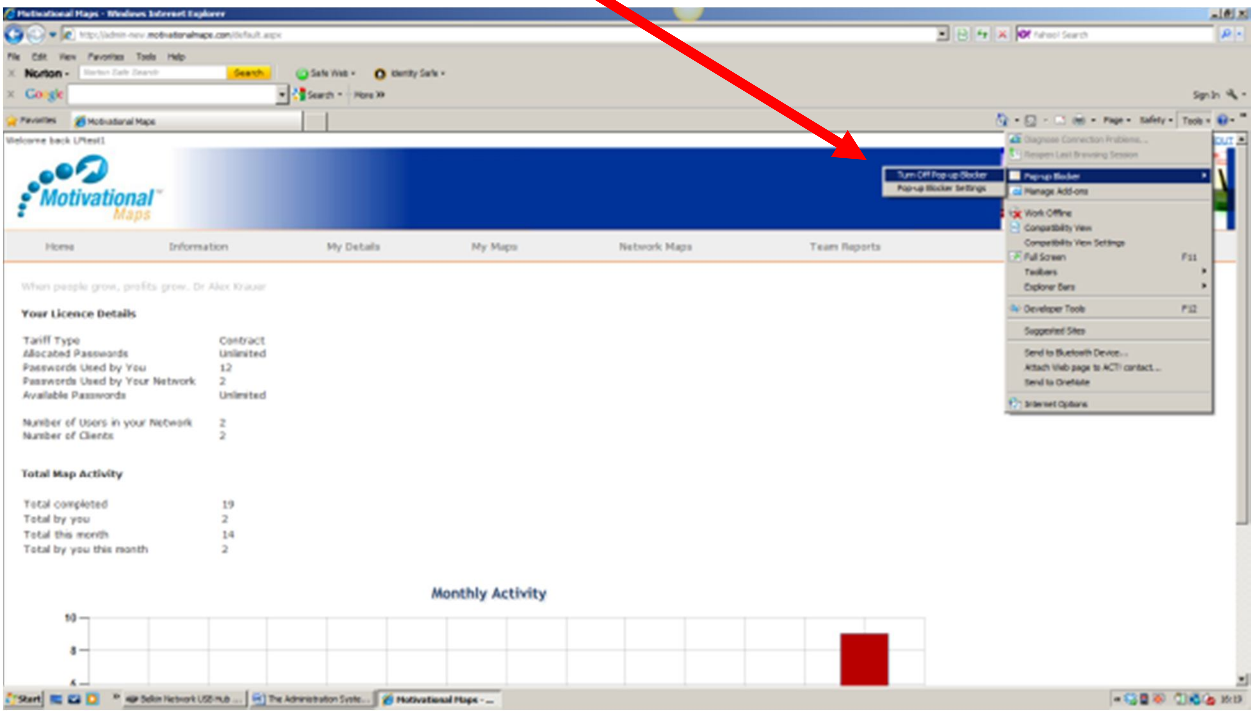


Enter the Web Address (URL) for the admin site, then click Allow

Enter the Web Address (URL) for the admin site into the **Address of website to allow** box, then click **Add**

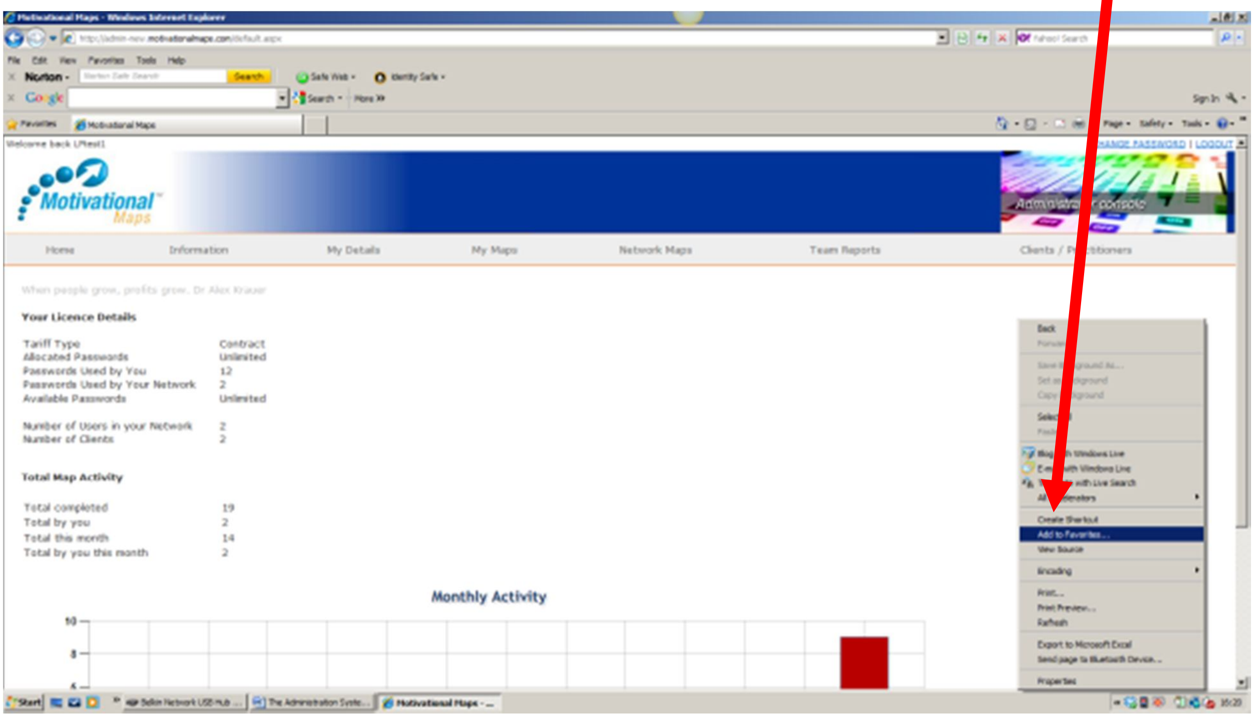


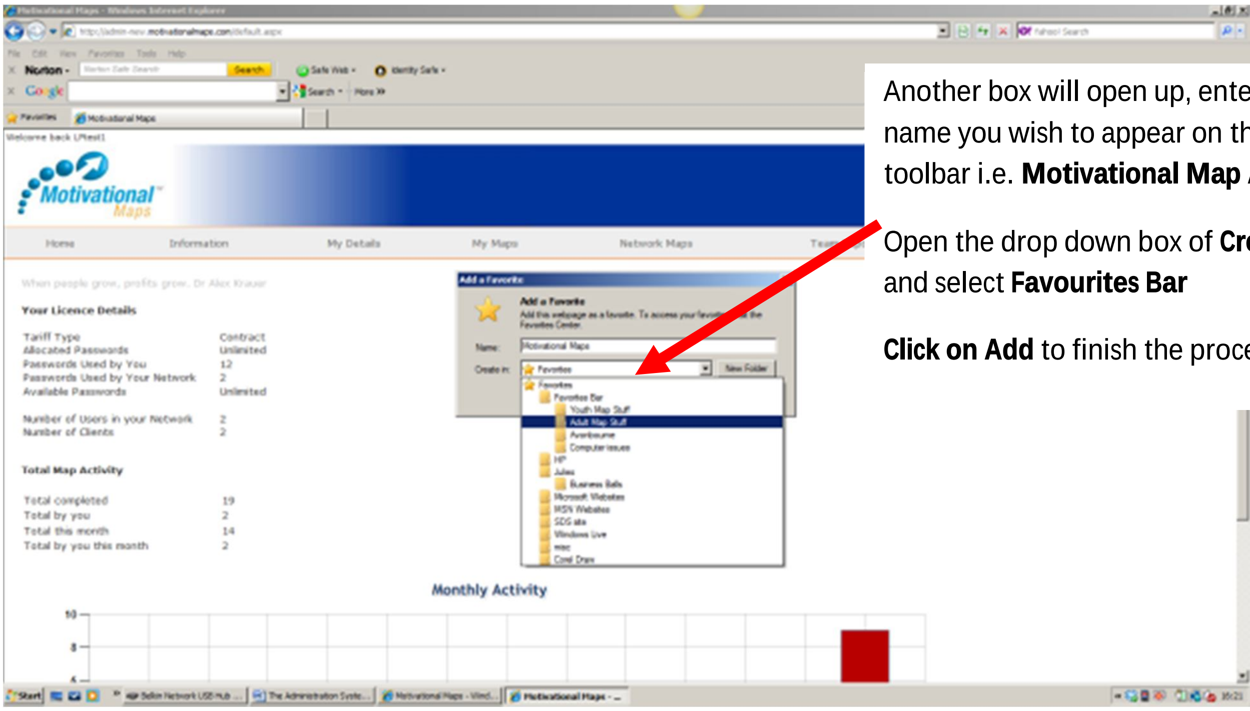
If you still experience difficulties accessing the PDF reports and password documents you will need to **Turn Off your Pop Up Blocker** rather than amend the Pop Up Blocker Settings.



Adding the Motivational Map Admin Site to your Favourites Bar

It is a good idea to set this site up on your favourite's toolbar so that it is easily accessible. To do this right click anywhere on the screen, a menu list will appear, Select **Add to Favourites**



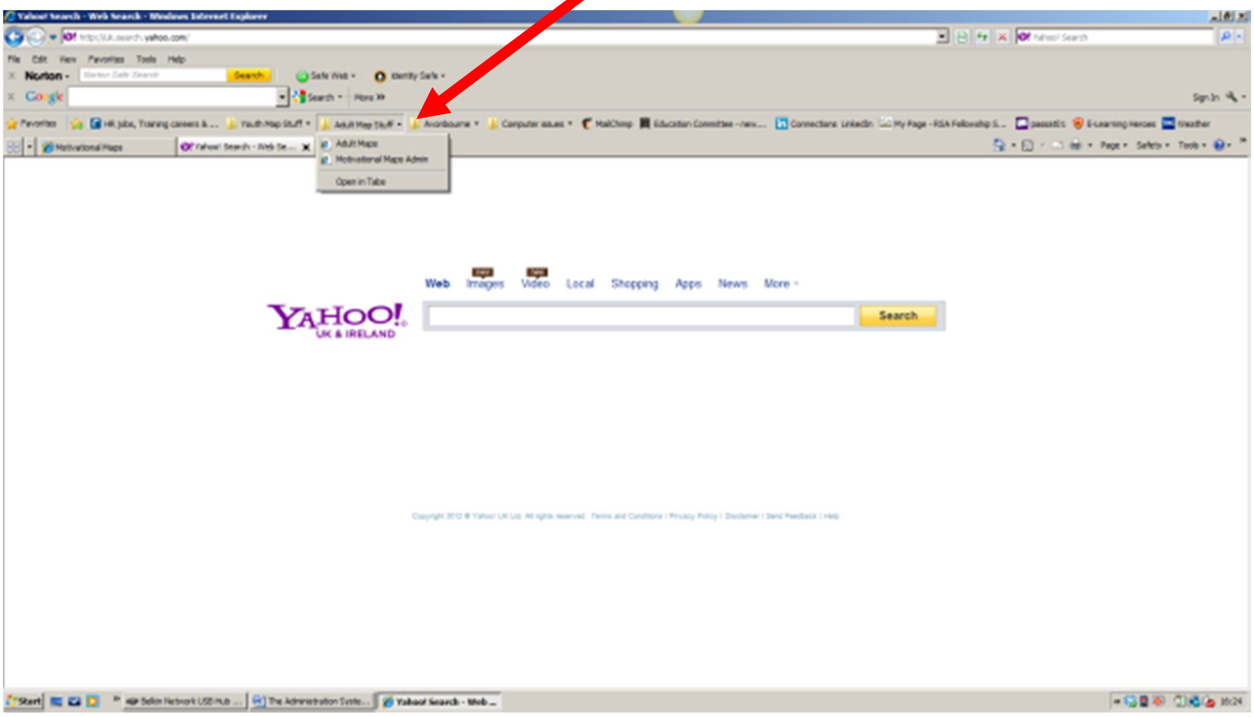


Another box will open up, enter the name you wish to appear on the toolbar i.e. **Motivational Map Admin**

Open the drop down box of **Create In** and select **Favourites Bar**

Click on Add to finish the process

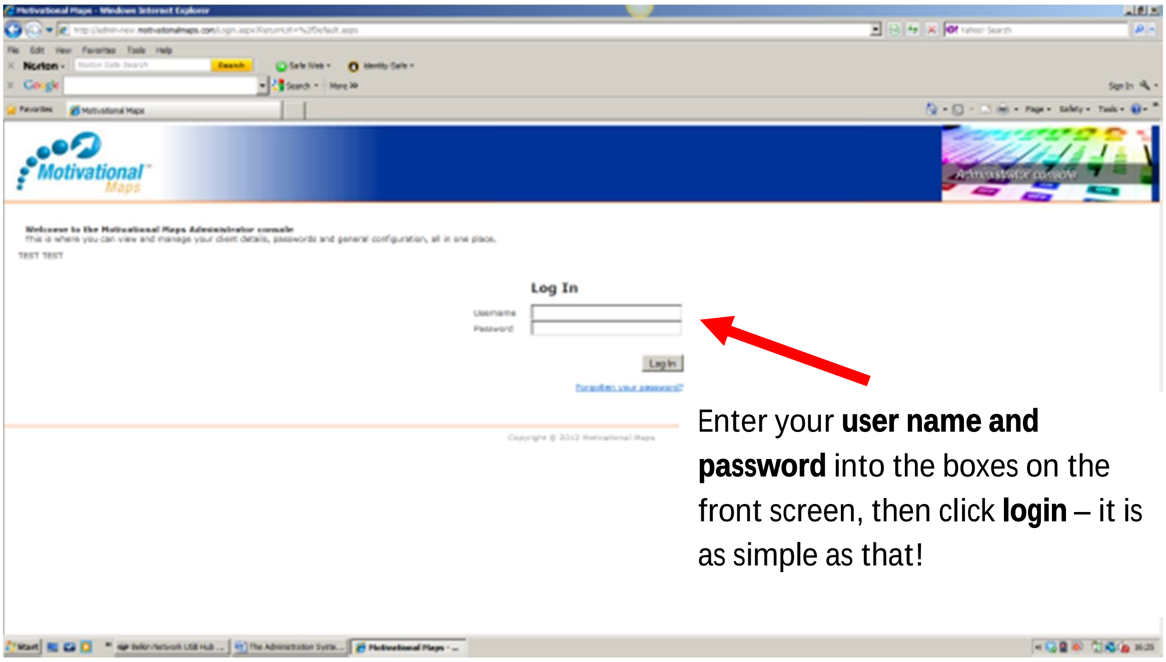
The Motivational Map Administration page is now on your favourites bar. In future, to enter the site you only need to click on this icon.



Please note this screen layout is typical for Windows Vista Internet Explorer. For a different internet Browser type please refer to your help feature.

Logging In

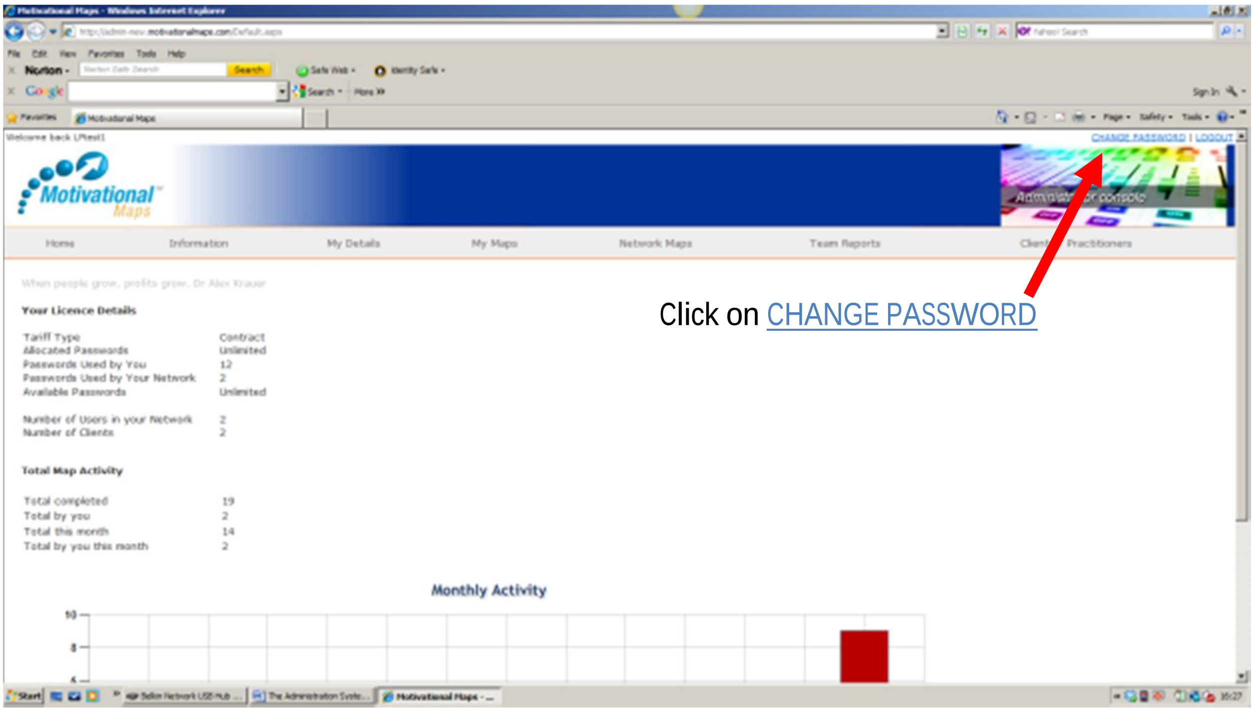
To log into the system you will need your Username and Password. This will have been supplied to you by your Business Practitioner.

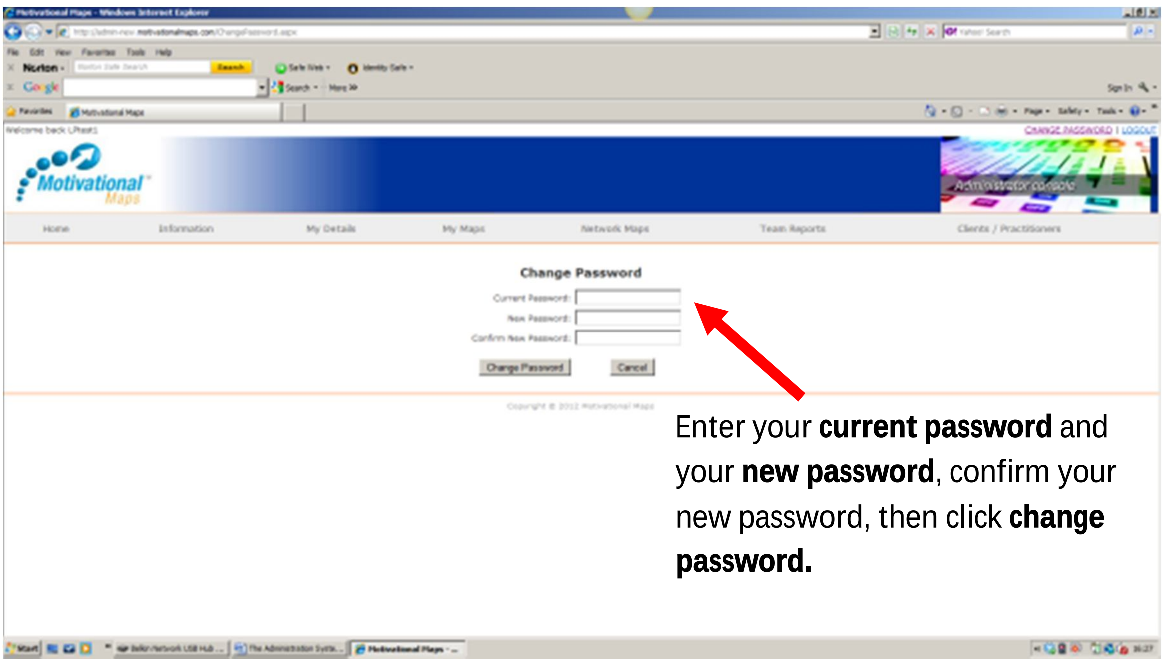


Enter your **user name and password** into the boxes on the front screen, then click **login** – it is as simple as that!

Changing your Password

When you receive your password and first log into the system, we recommend you change your password. We also recommend you change your password on a regular basis to ensure it remains secure. To change your password, you first need to log into the system, you can change your password from any screen.

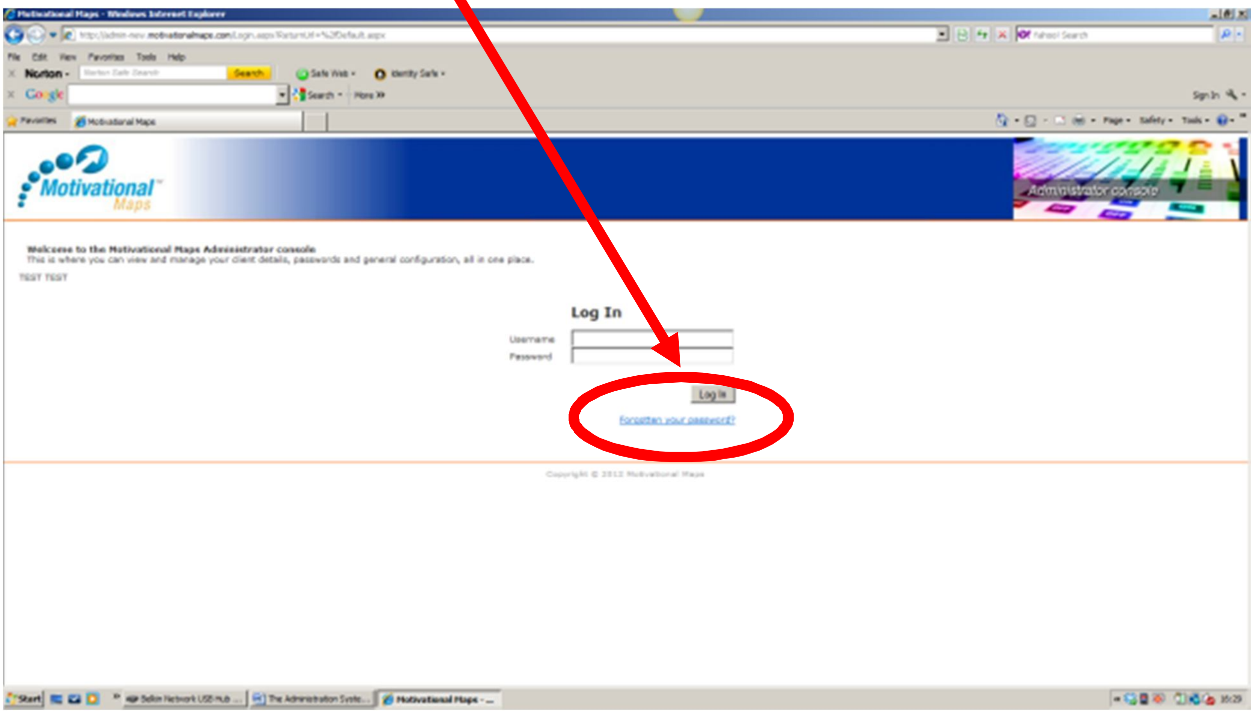




The system will show a message confirming that your password has been changed. Click continue, you will be returned to the homepage to continue with your session

Forgotten Your Password?

If you have forgotten your password, you can obtain a new password by clicking on Forgotten your password? in the Log In screen. The system will automatically generate an email with your new password.



Please note though, you do need to enter your username to obtain a new password. If you cannot remember your username, or the system is not giving you access despite entering the correct details, please contact your Business Practitioner who will be able to help you.

System Overview

The table below shows a description of each page/tab in the system, and which type of practitioner will be able to access the various areas of the system.

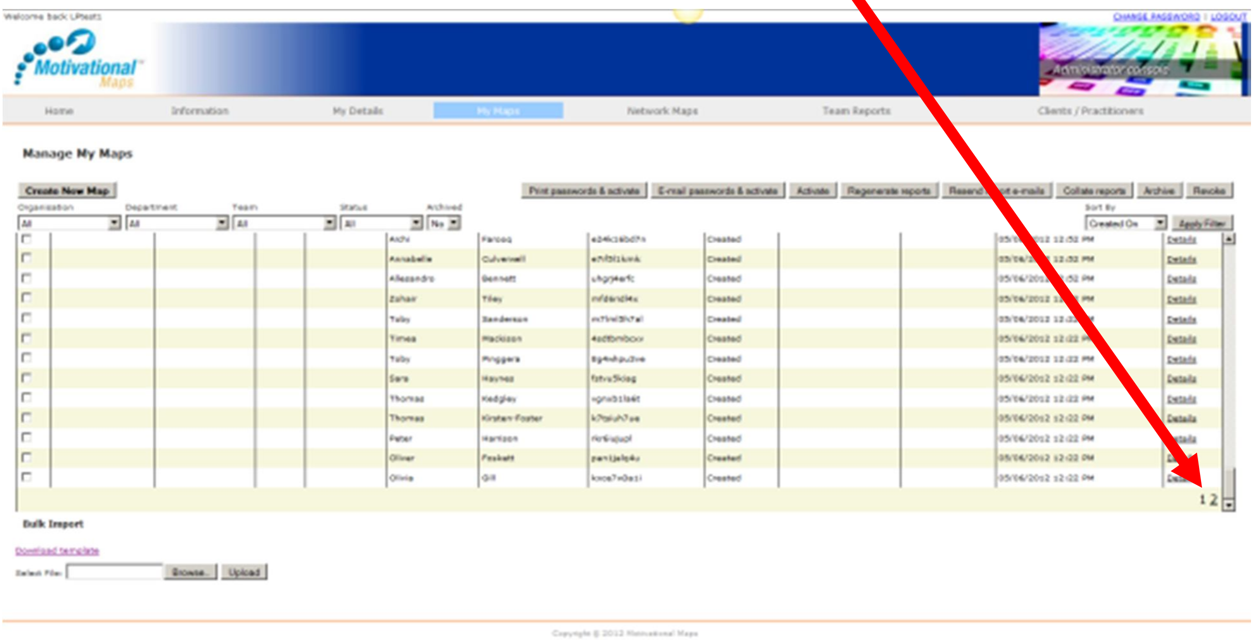
Page	Description	Client Practitioner	Licensed Practitioner	Business Practitioner
Homepage	Provides information about your license and the map activity completed to date.	✓	✓	✓
Information	The place to go to find out latest news, download copies of update bulletins and check the latest version of the Training Manual.	✓	✓	✓
My Details	Enables you to update your details at any time. You can change your address, contact numbers etc,	✓	✓	✓
My Maps	The place where you set up new records, issue passwords, view, print & save reports and do all the housekeeping like revoking passwords and archiving records.	✓	✓	✓
Network Maps	Business Practitioners can access the records of their Licensed Practitioners. This enables you to provide support to those in your network when needed.	✗	✓	✓
Team Reports	The area of the system where you create and store Team Reports.	✗	✓	✓
Clients/Practitioners	The place where you set up and manage practitioners within your network.	✗	✗	✓

Common Functionality

To keep the system simple, we have incorporated a few functions which are common across all areas. Rather than keep repeating ourselves, we have covered these functions off in this section of the handbook.

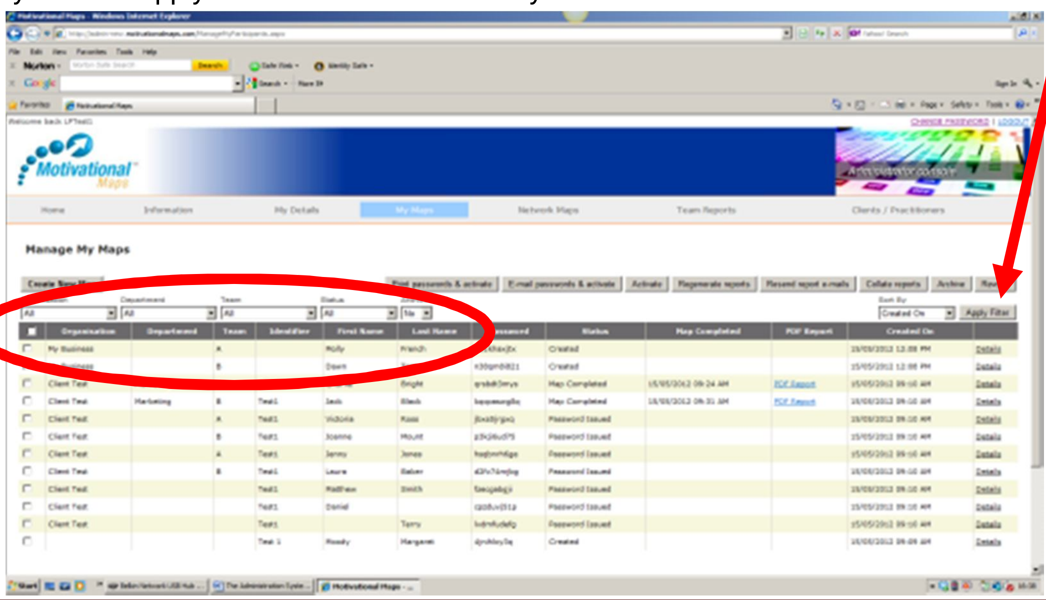
Finding Records using the filter system

The My Maps and Team Maps screens will, as default, show all records you have created. As you start to build a large number of records, there will be a number of pages to this screen, to move between the pages click on the page numbers at the bottom right of the screen.



The filter functionality is designed to help you filter the records so that you can quickly identify the records that you wish to work with.

Use the drop down lists to identify the groups of records you wish to identify, click **Apply Filter** and the system will apply the selected filters and only show these records on the screen.

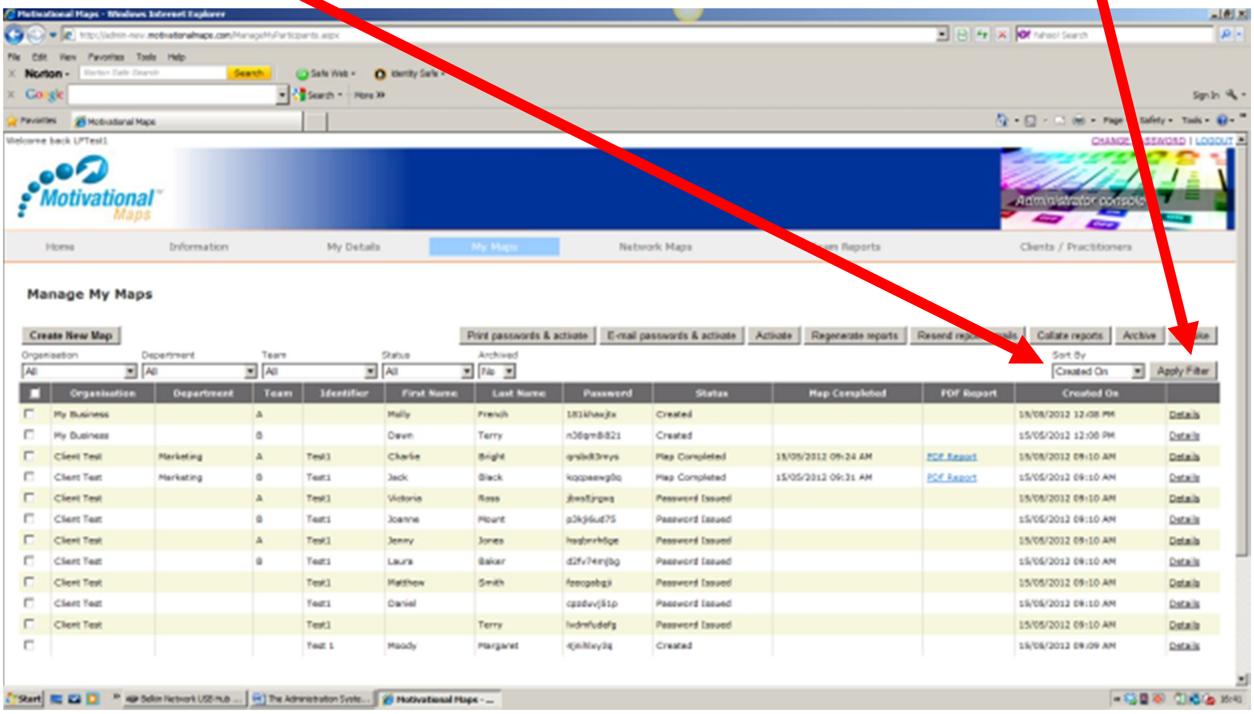


Sorting the way records are displayed on screen

Sometimes you need to find a specific record, or quickly identify if any maps have completed that day. The **Sort By** function enables you to do this. The drop box enables you to sort the records on screen by the following categories:

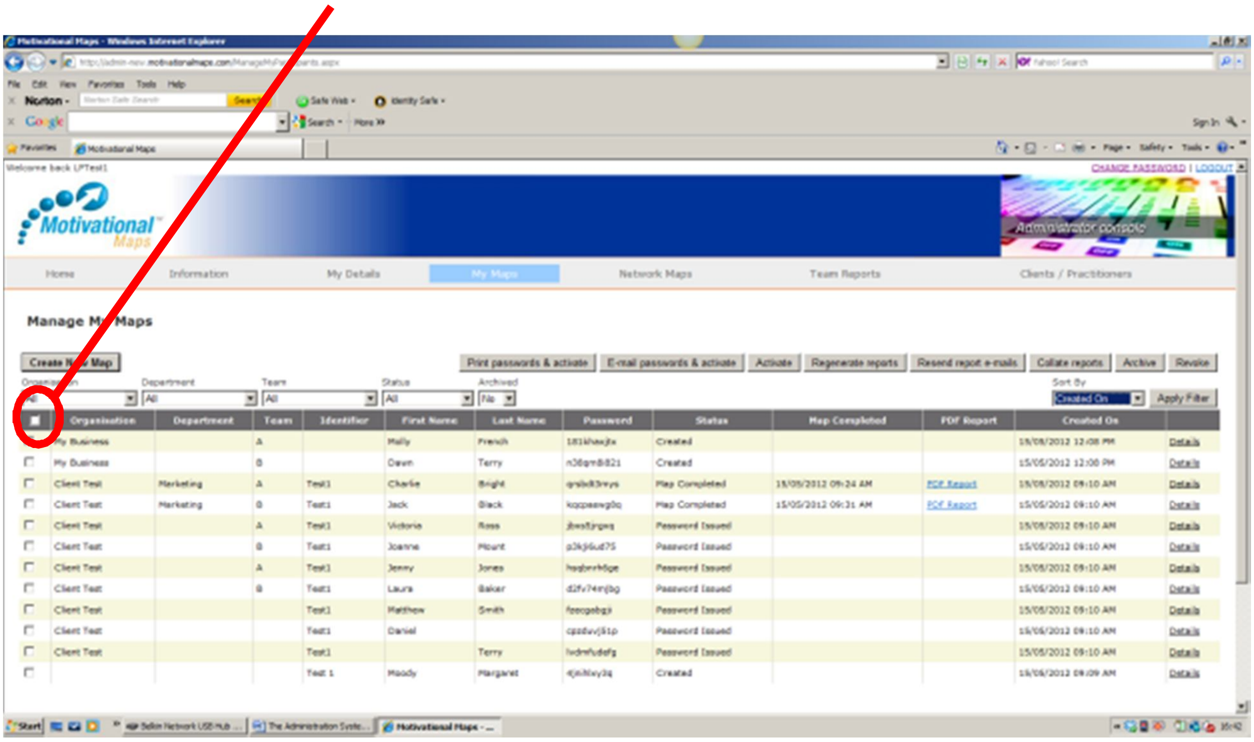
- Created On
- Map Completed
- Last Name
- Parent User (within Network Records screen for Business Practitioners Only)

Just select the category you want to the records to be sorted by, and the click **Apply Filter**



Selection of multiple records

On the 'My Maps, 'Network Maps' and 'Team Reports' screens, there is an additional checkbox in the header of the table.



When ticked, it will cause everything in view to be ticked. When un-ticked, it causes everything to become un-ticked. This enables you to use the filtering system to narrow down the records that you need, and then use this checkbox to select all of remaining records. From here you can issue passwords, regenerate reports, revoke passwords, select records for inclusion in a team report and archive records, all by the click of this button, rather than having to click on each individual record. What a time saver!

If you manually tick everything this box will become ticked automatically, if you then remove any one tick, it will become un-ticked.

Homepage

The Homepage of the administration system is designed to provide you with some information about your license and the map activity completed by you and, if you are a Business Practitioner, the users within your network.

What does this information tell me?

A description of information provided is detailed below along with a key of which type of practitioner will see this information.

RED – Business Practitioners Only & Licensed Practitioners

BLUE – PAYG Only

GREEN – All practitioners

Your License Details

Tariff Type – Whether you are on a Pay As You Go or Contract

Allocated Passwords – how many passwords you have available to issue. If you are on a Contract this will show unlimited, if you are on a Pay As You Go contract, this will show how many have been purchased.

Used Passwords by you – The number of passwords you have used, issuing directly to end users

Used Passwords (by your network) - The number of passwords used by practitioners in your network

Available Passwords – The number of passwords that are still available for issue.

Number of users in your network – The total number of practitioners that are in your network

Number of Clients Practitioners – How many practitioners in your network are Clients

Number of Licensed Practitioners – How many practitioners in your network are Licensed Practitioners

Total Map Activity

Total Completed – The total number of maps completed by all users within all networks

Total By You – The total number of maps completed by you

Total this month – The total number of maps completed this month by all users within all networks

Total by you this month - The total number of maps completed this month by you

The **Monthly Activity Graph** shows by month, the allocation of passwords. The bars will show the issued passwords as red and the used passwords (i.e. the map has been completed) as green. This enables you to track how many outstanding passwords you have each month, and have a feel for the ageing of the passwords. If a password has been issued, but 2 months on it is still not used, some intervention/conversation may be required to confirm if the end user will complete the questionnaire.

For Pay As You Go Practitioners, this will be important to ensure the passwords they have paid for are indeed being used. If the password is not used, you can revoke it and put that password back into the pot for allocation to another individual.

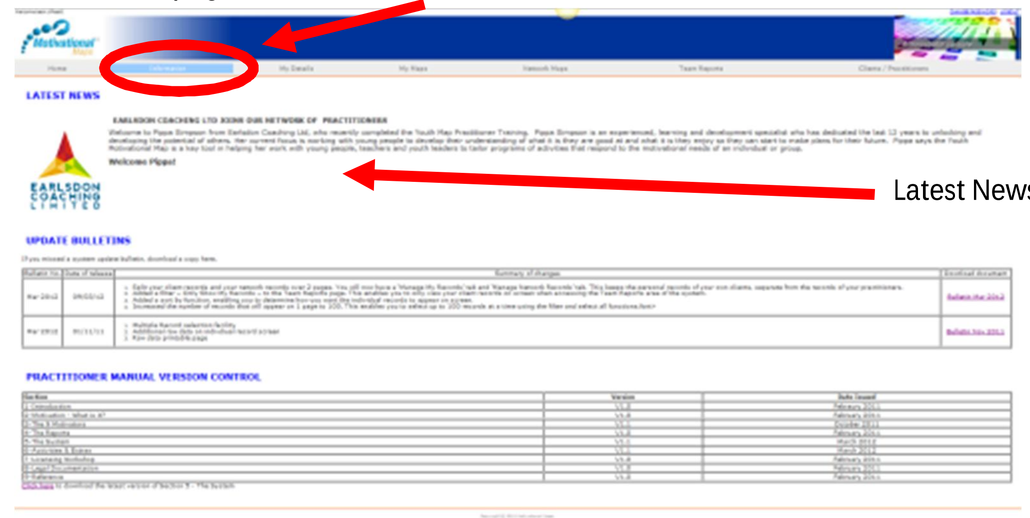
Obviously this will not be such an issue for Monthly Contract users, but this data will still be useful to enable you to manage your business. How many of the passwords you issue do actually get used, what is the standard timescale from issue to use of a password, etc.

Got an idea?
We plan to provide more information on this page as we develop the system further, so if you have an idea of some useful information that could be displayed on the homepage, let us know and we will see if we can build it into the next release.

Information

The Information page is a place to go to find out latest news, download copies of update bulletins and check the latest version of the Training Manual. You can even download Section 5 of the training manual– The System.

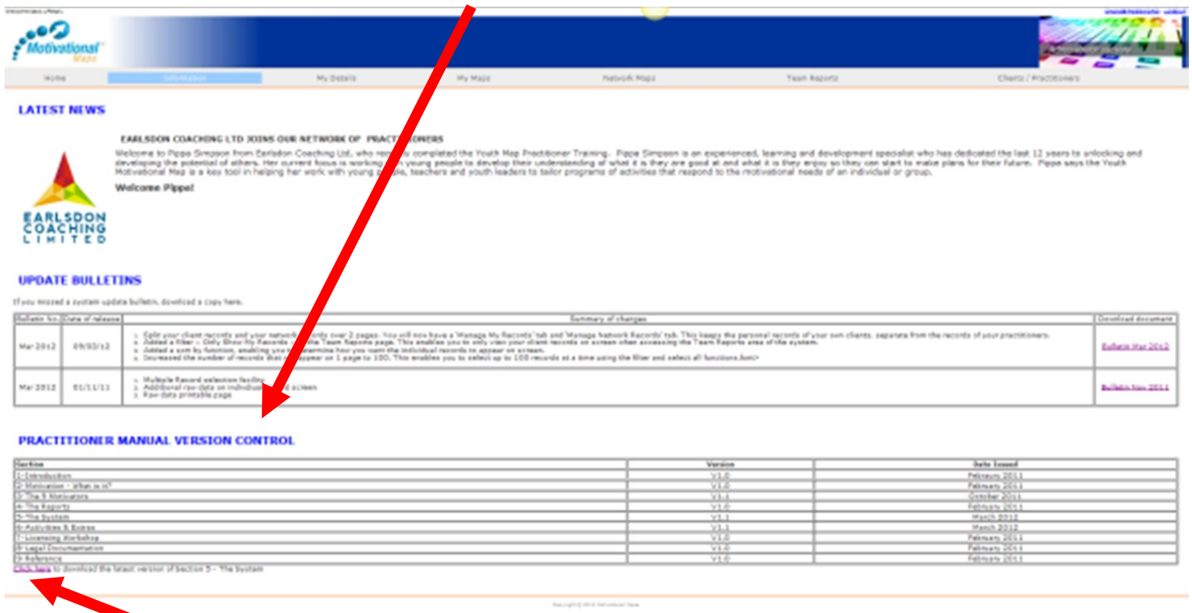
To enter this page click on the **Information** tab



Latest News appears here

Update Bulletins will be listed and can be downloaded for future reference.

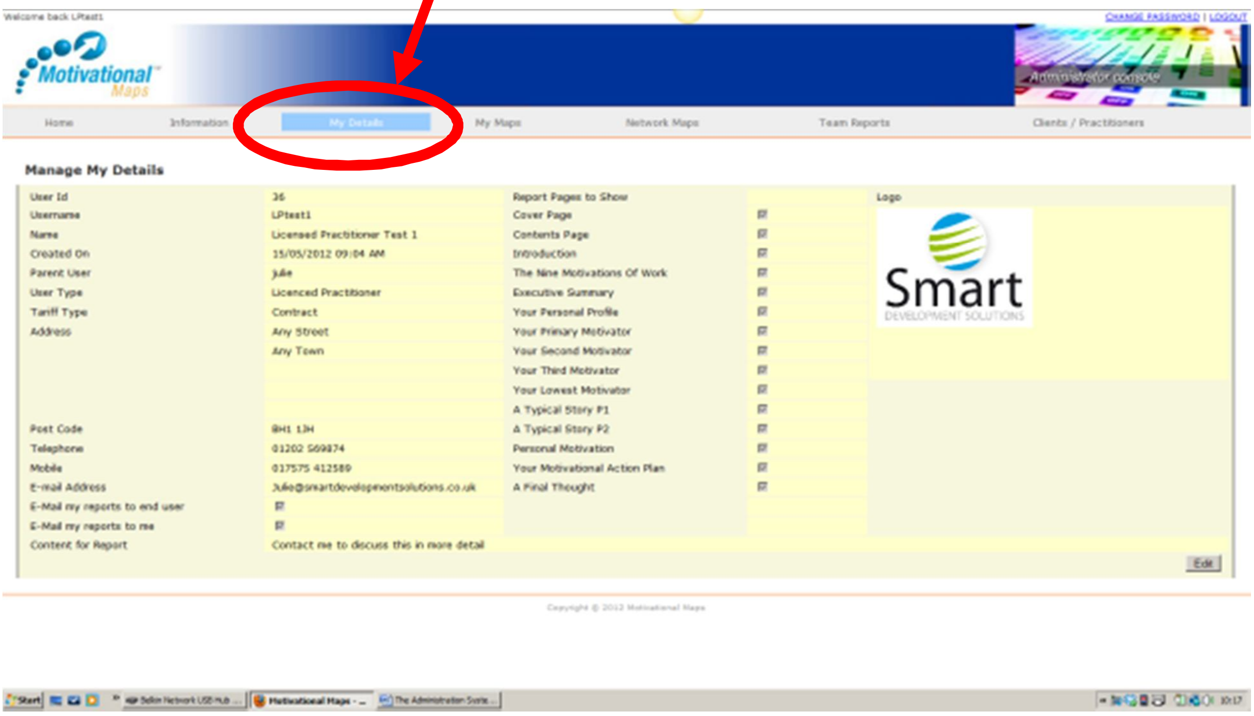
You can check you have the correct versions of the Training Manual, if you need a section re-issued, contact us and we will email you the latest version.



For ease though, the latest version of **Section 5 – The System** will always be available for download here.

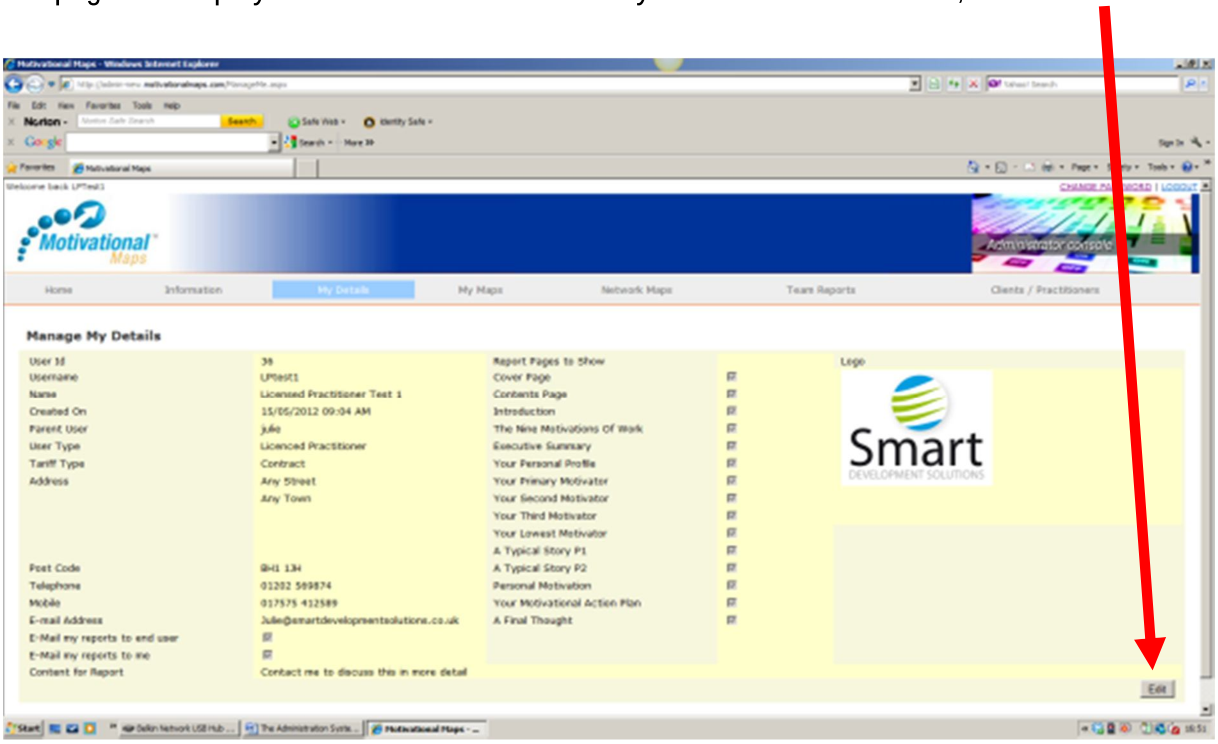
Managing Your Details

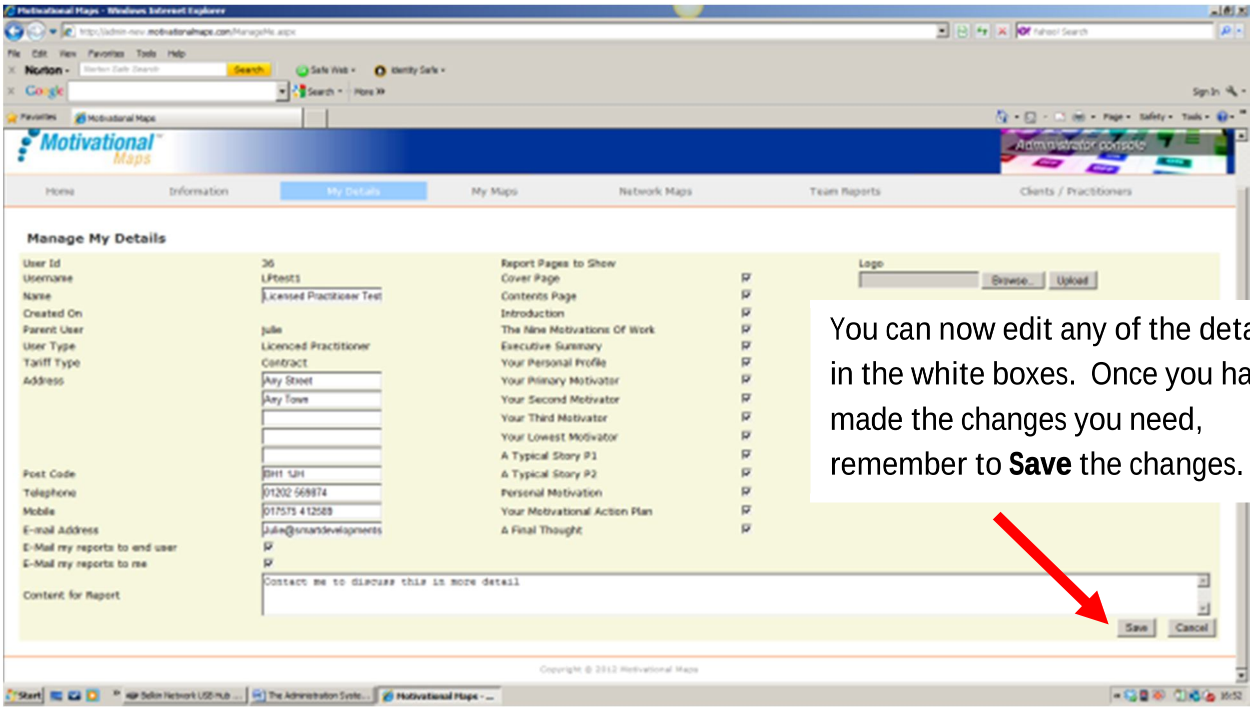
To enter this page click on the **My Details** tab.



Editing your company information

When your record is created on the system, some of the information will be populated; this part of the system enables you to update your details at any time. So if you change your office address, have a new mobile number etc, you can automatically update the system yourself. The page will display the current information for your record. To edit this, click on **Edit**

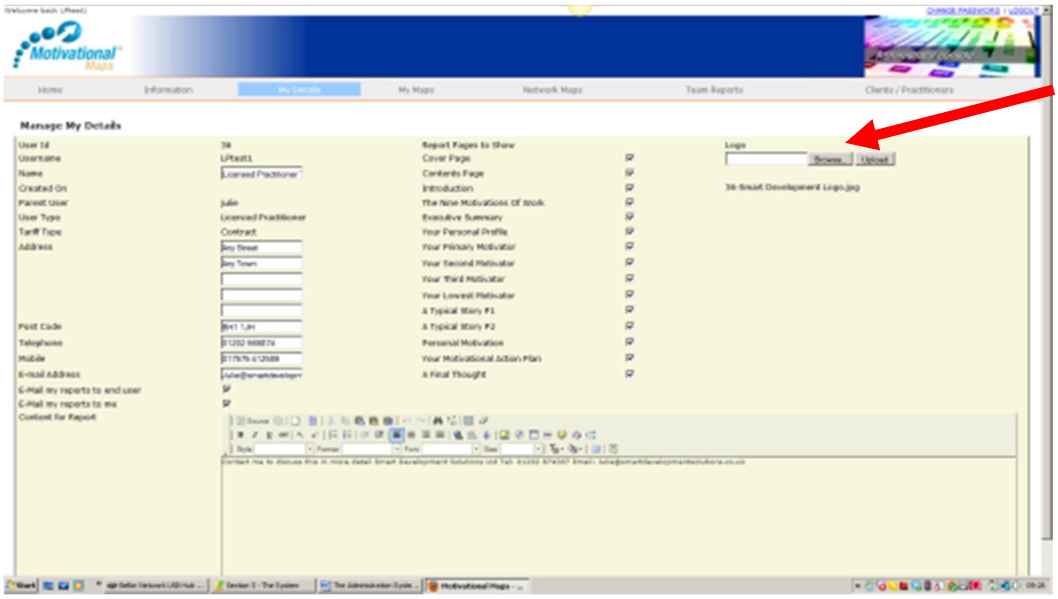




You can now edit any of the details in the white boxes. Once you have made the changes you need, remember to **Save** the changes.

Uploading your logo

This is the part of the system where you can upload your company logo to enable you to white label the reports. This will appear on your personal record and also on any reports the system generates from passwords issued by you to your clients. Follow the steps below to upload your logo to the system.



Click on **Browse...**

Step 1

The system will open your folders directory, select your logo document from your files, and click **open.**

Step 2

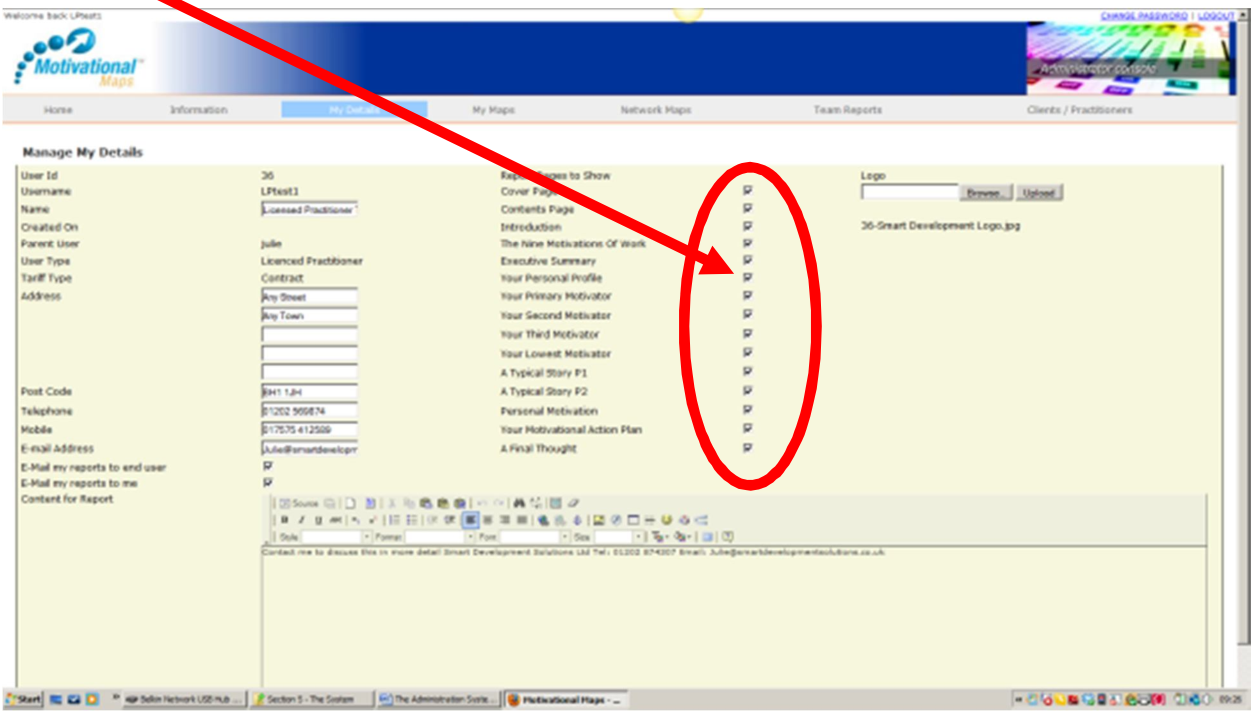
The file name will appear in the box, click **upload**.

Step 3

The file name of the logo will appear underneath the box. Now **save** the changes you have made, the screen will refresh itself and your logo will appear on the record.

Setting the contents of the report

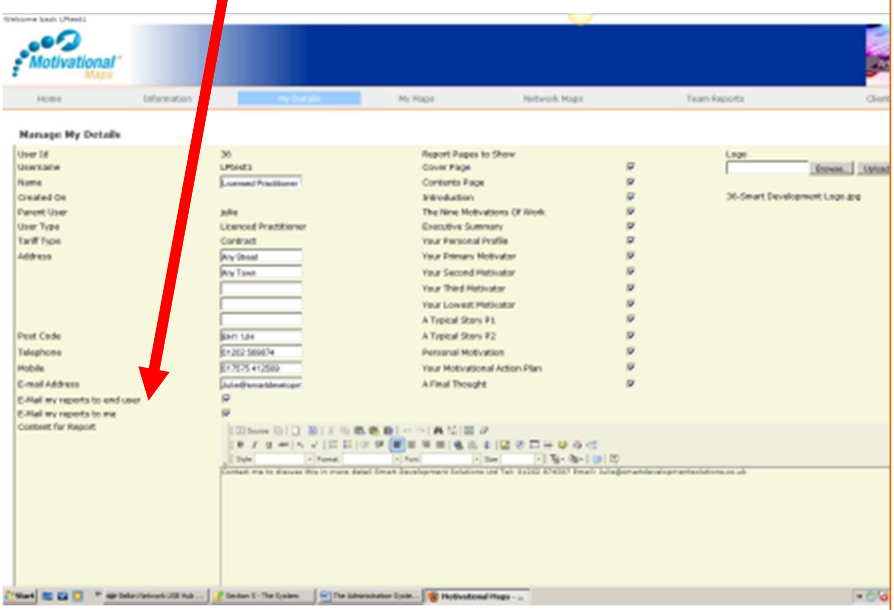
This part of the system is where you can switch on and off each page of the report. The system will automatically default for all pages to be included in the report, if you do not want a page just uncheck the box. The only page that cannot be switched off is the Cover page.



If you switch off the first page of the report, the system will produce a blank page; however this page will not be numbered so it can just be removed at the point of printing.

Setting the system to Email Reports

The system will automatically send the report upon completion of the questionnaire to the end user, and a copy to you-the client/practitioner. You can adjust these settings to turn this function on and off according to your preference.



V2 ADDITONAL FEATURE

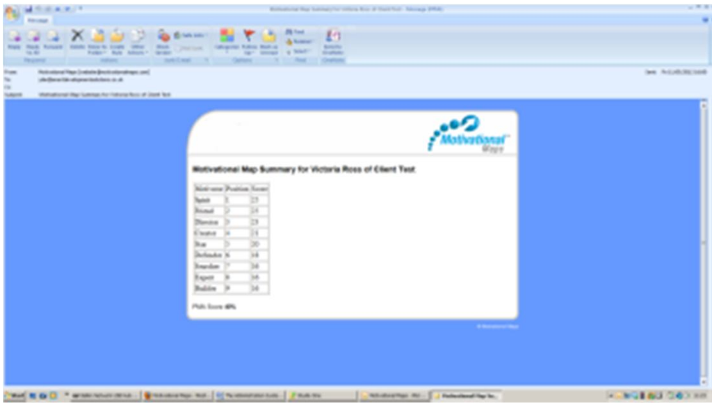
It is now possible to override your usual email settings - if you choose not to send reports directly to end users you can override this at any point by selecting records and using the email override button - this will then send reports to the end user directly from admin.

Please Note: You must ensure the email address is in this part of the system is **YOUR** email address, the email address for the end user is held in the individual person record.

The system will default to these boxes being checked, meaning that the end user and you (the client/practitioner) will receive an email with the report upon completion of the questionnaire. To switch this off, just uncheck the box and save the record.

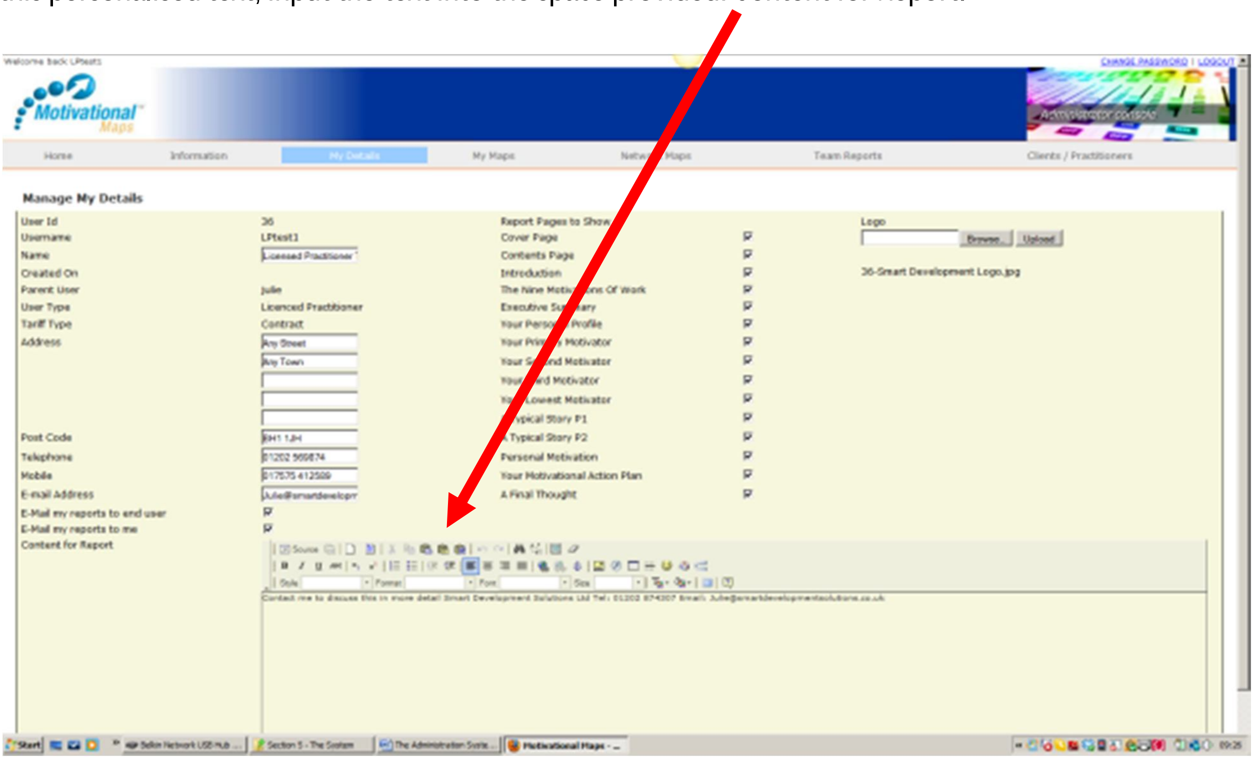
Email my reports to end user – the end user (the person who has completed the questionnaire) will receive a copy of their report automatically upon completion of the questionnaire.

Email my reports to me – you will receive a copy of the end users report once they have completed the questionnaire. You will also receive an email with the raw data information for that user, enabling you to analyse the data without having to print the full pdf report.



Adding personalised text to your reports

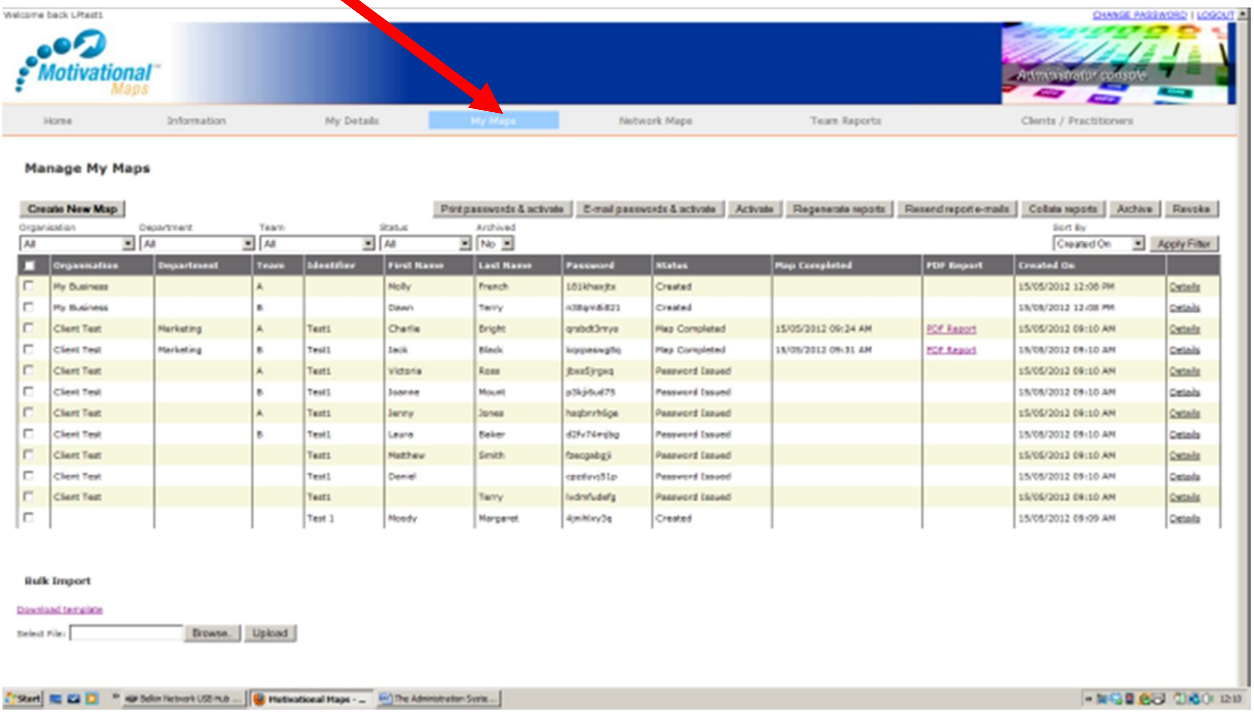
The final page of the report contains a section where you can add your own personal detail, this may be some motivational content, or your contact details so that they appear directly onto the report. To add this personalised text, input the text into the space provided: Content for Report.



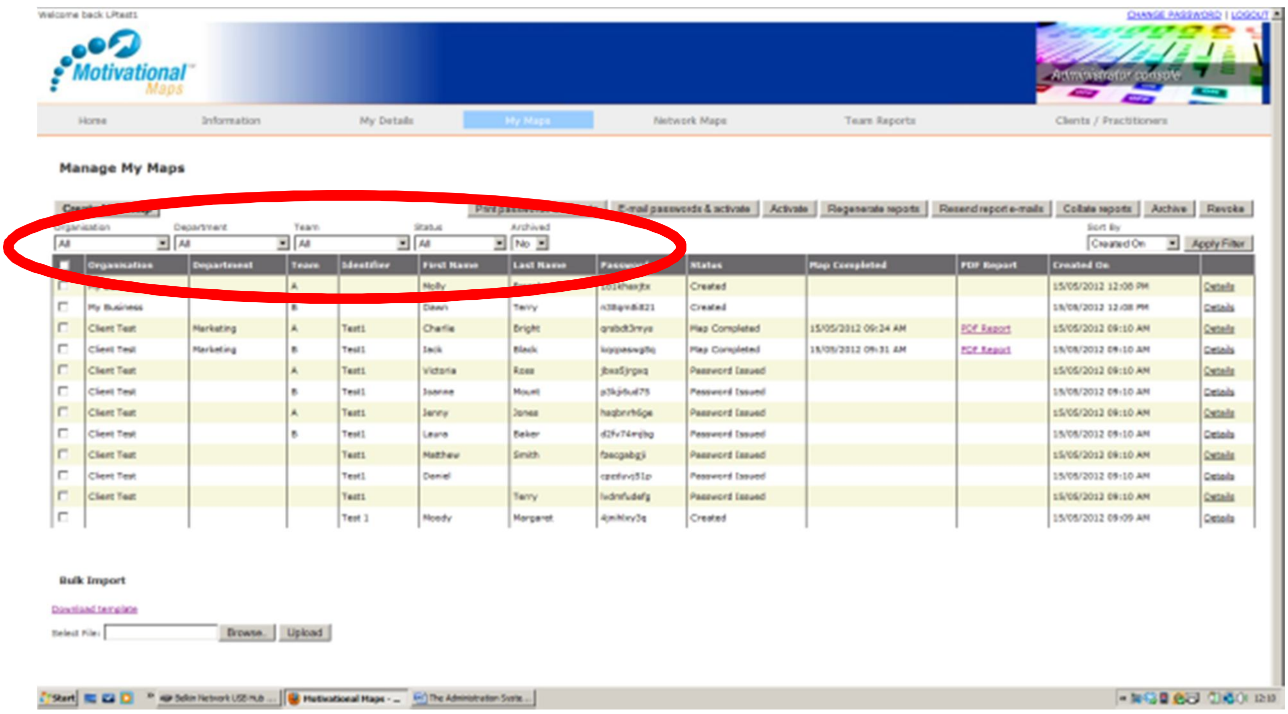
Text will appear at the bottom of final page, prior to the Motivational Maps disclaimer text.

Issuing Passwords

Any activity relating to an individual takes place in the **My Maps** Tab. This includes, adding a new record, bulk upload of records, issuing and revoking passwords, viewing and printing reports, editing details. To enter this section of the system, click on **My Maps**

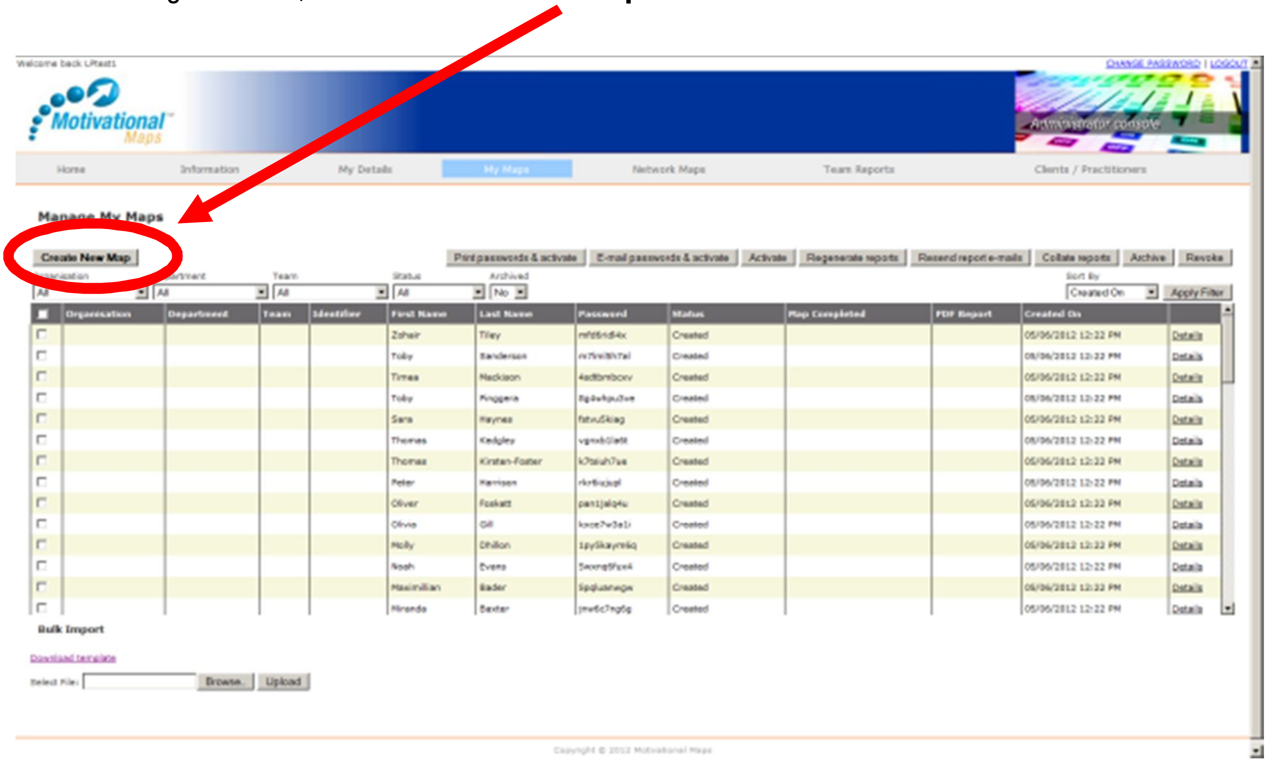


When you first enter the screen you will see all of the records you have added. You can use the filter the system to easily narrow down a search for a group of records, instructions on how to filter are detailed on page 13 of this manual.

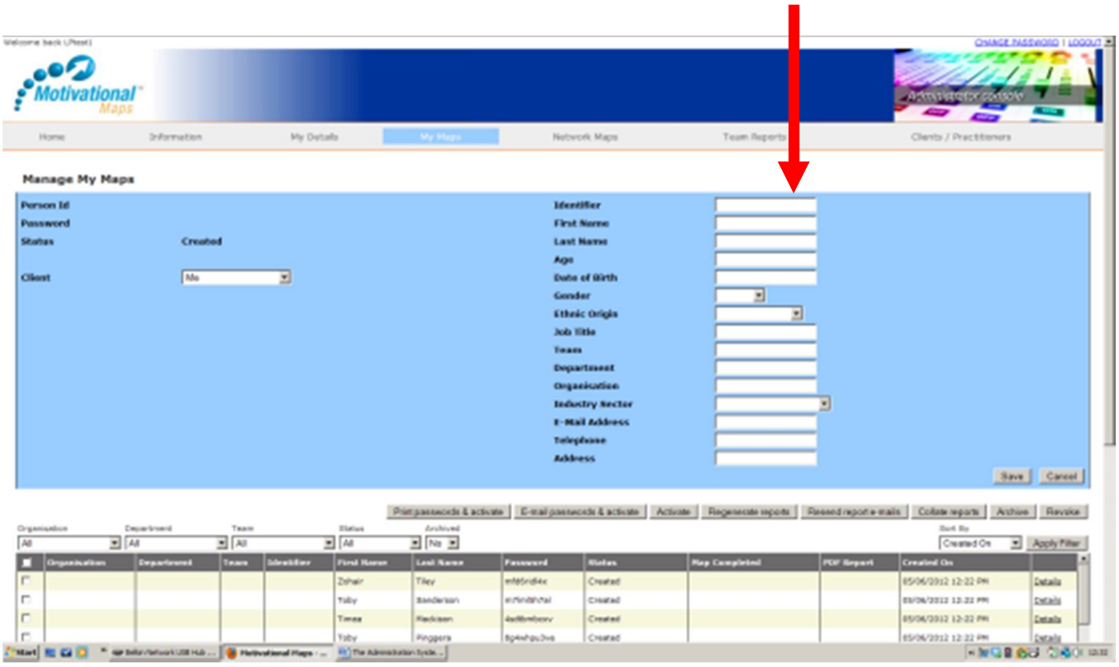


Adding a person record

To add a single record, click on **Create New Map**



A blank record will pop up. Populate the white boxes with the relevant data. At this point, the fields are not mandatory so you do not need to have all of this information to hand to create the record, the individual can add missing areas at the point of completing the questionnaire.



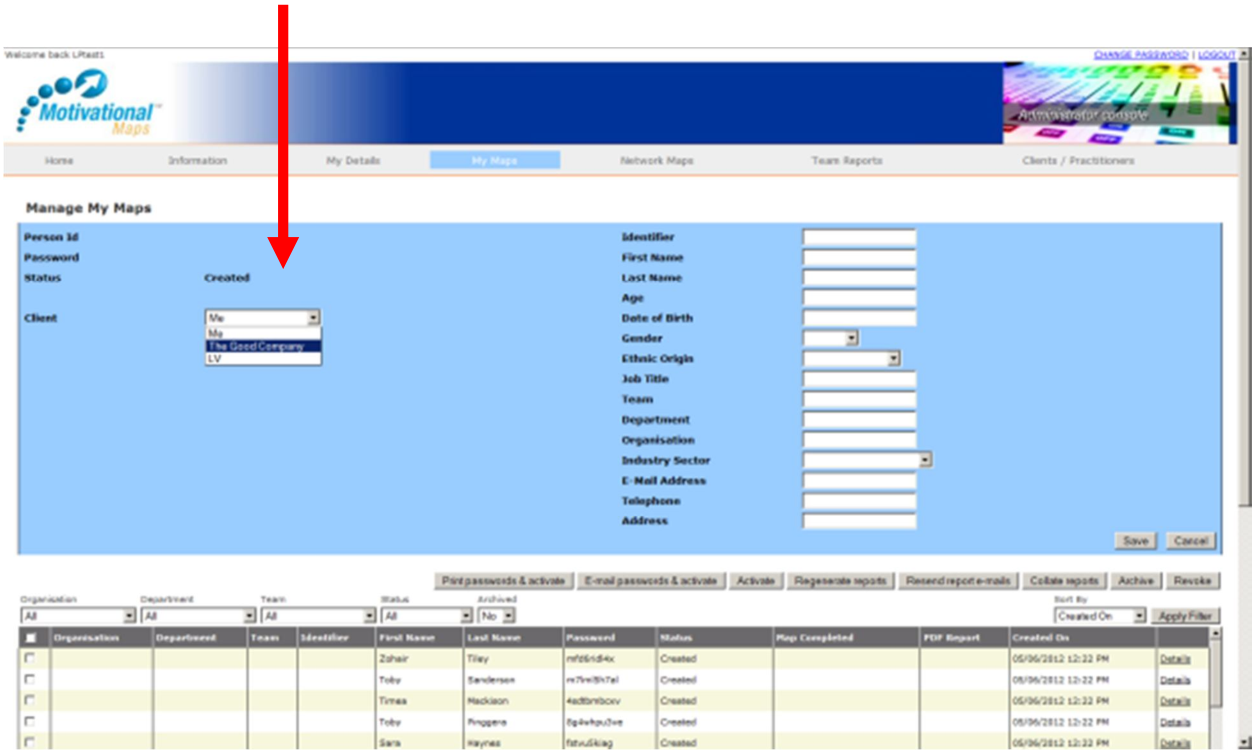
Please note:

Identifier – this is a field to enable you to identify the record – it could be an employee number or it could be the name of a project/pilot group (i.e. Finance Department Change Project).

It is not a mandatory field so it can be left blank if you wish.

Date of Birth – this needs to be in the format dd/mm/yyyy.

When you add records, you can assign them to a specific client, enabling you to manage your records more efficiently. Please note, a client will only appear in this list once you have created the client, therefore you must create the client before adding records, you are not able to assign a record to a client once it has been created.



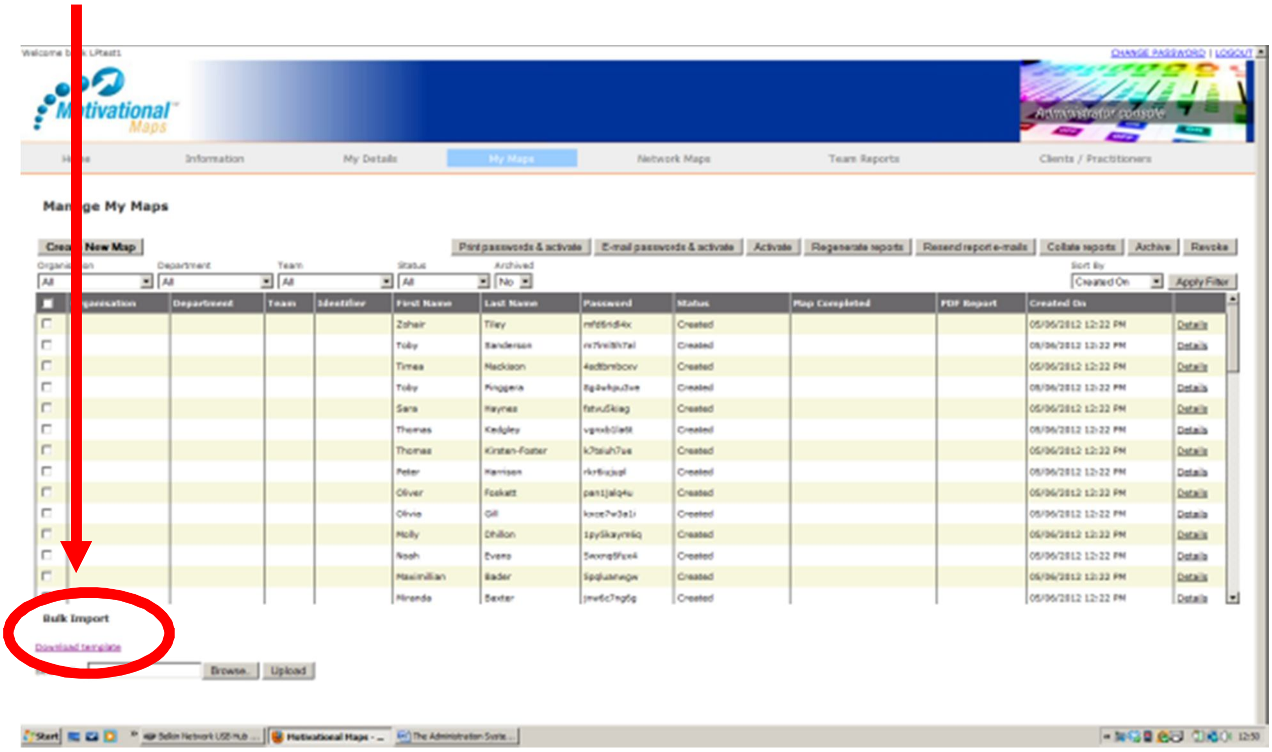
When you have entered the detail available to you, click **Save** to create the record on the system. At this point the system will issue a User ID, and a password.

Adding a blank record

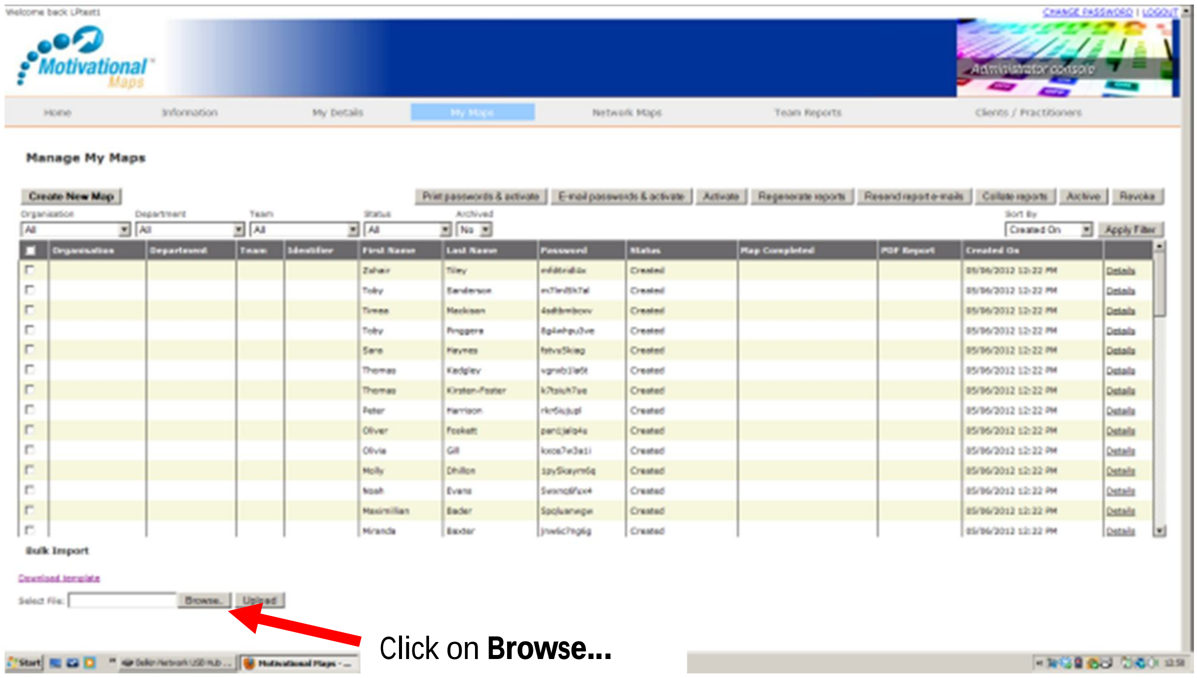
If you wish to add a blank record, for example create some passwords that are not assigned to a specific person, follow the same process as above. However, we recommend you use the identifier field to note the purpose or to who these passwords are being supplied (i.e. The X Company sample). This will enable you to track their usage and identify when they have used the password.

Bulk Upload of person records

If you have a number of records that you want to create, it is easier to use the Bulk Upload process using the csv file template. The template can be downloaded from the system by clicking on Download template and then saving the file into your directory.



When you have populated the template with the relevant data for all records that you wish to create, follow these steps to upload the data to the system. **Remember to save the file as a csv file and not an xls file!**



Step 1

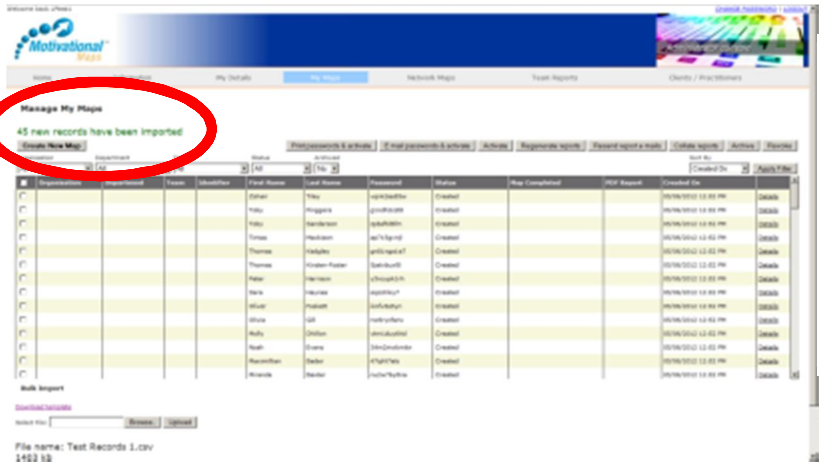
The system will open your folders directory, select the CSV file from your files, and click **open.**

Step 2

The file name will appear in the box, click **upload**.

Step 3

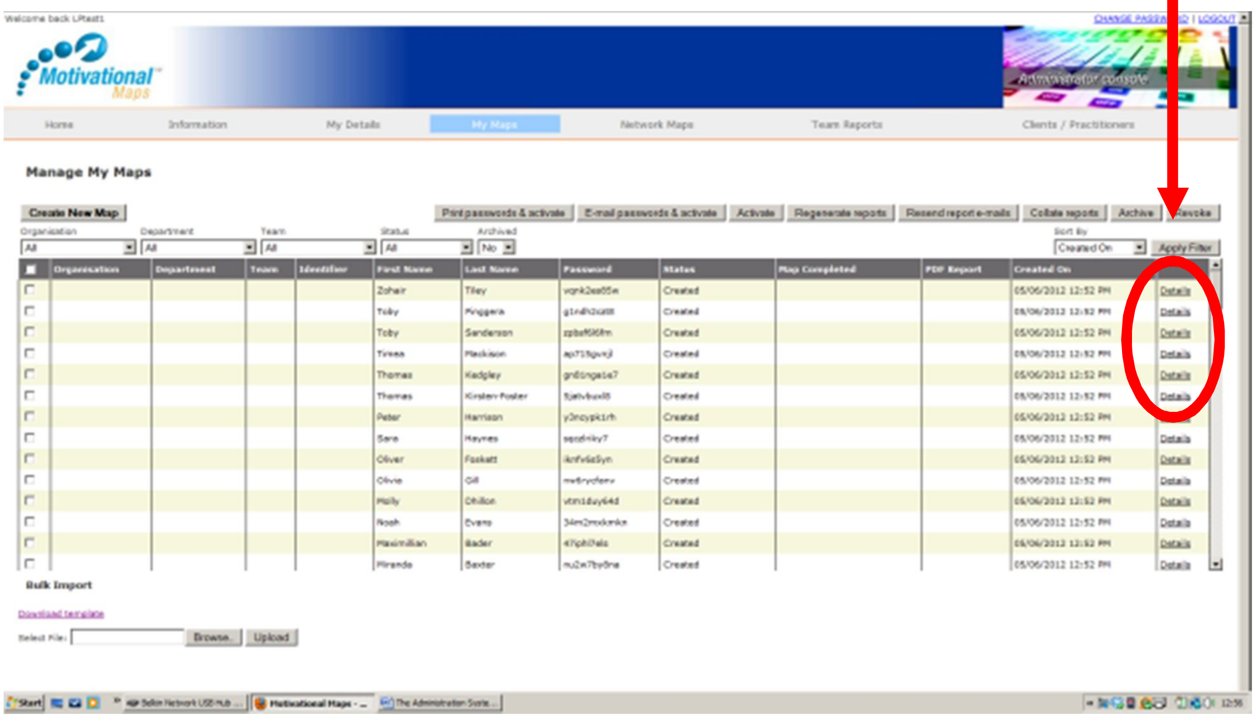
The system will upload the files and add them to the list of records, a message will show at the top of the screen to confirm the number of files that have been created.

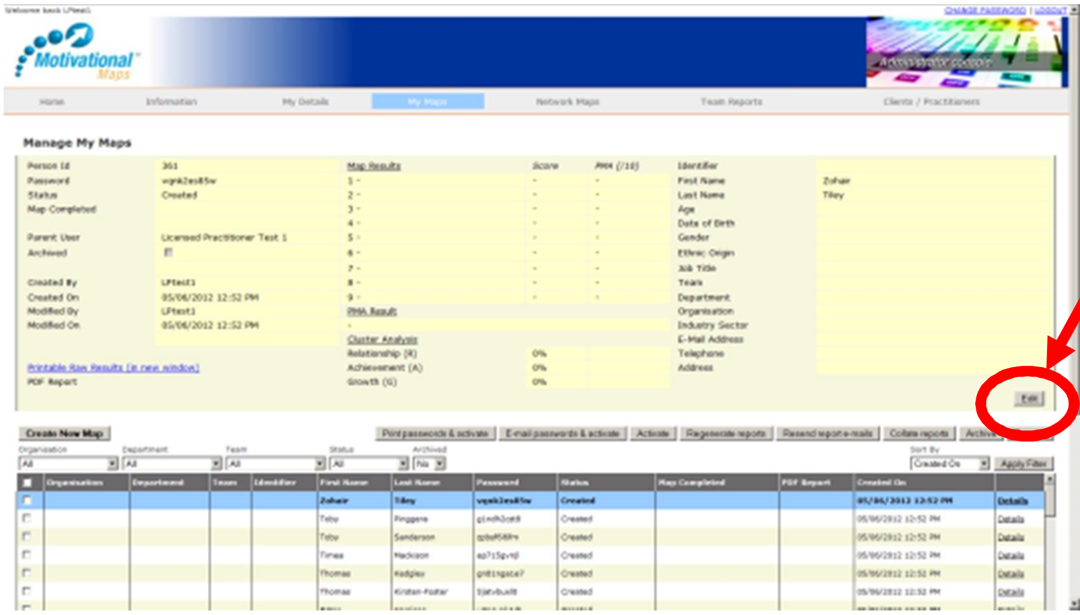


Note: If you get an error message after the upload, first check that you saved the file as a csv file and not an xls file. If you still have an error message and the file type is correct (.csv) contact your map practitioner for assistance.

Editing an Existing Record

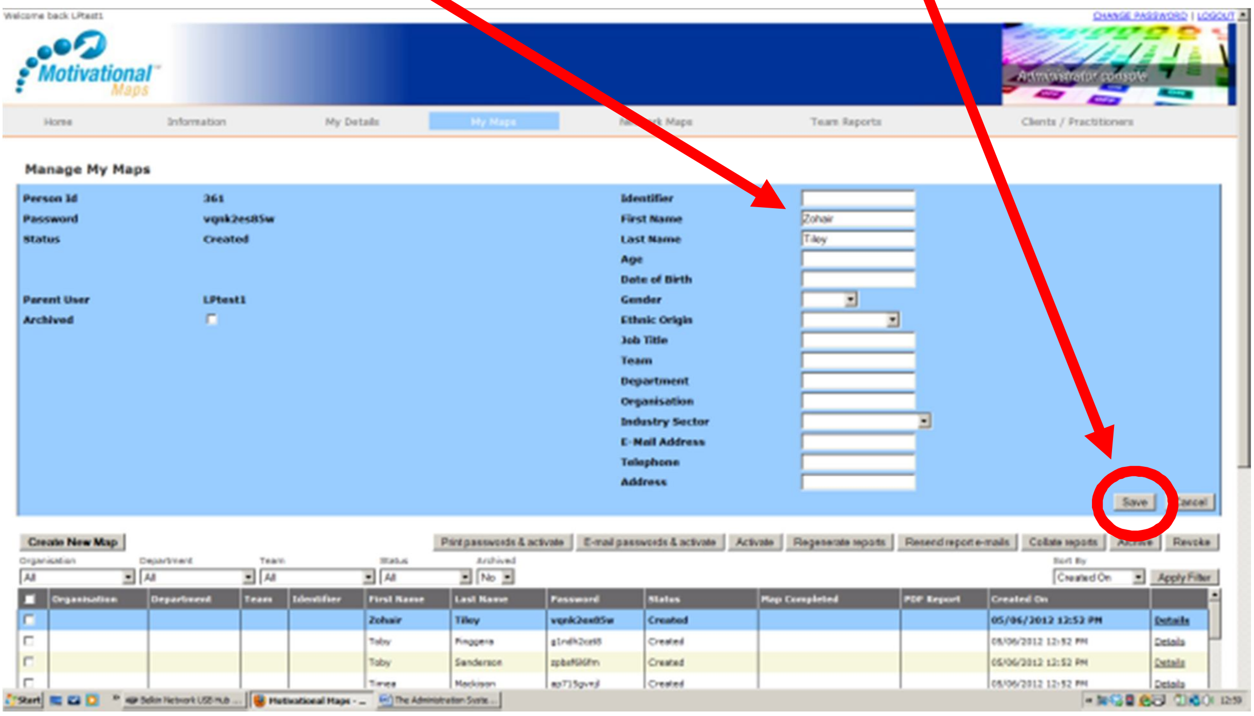
To make amendments to an existing record, select the record you want to amend by clicking on **Details** for the record that you want to amend.





The record detail will appear at the top of the screen. Click **Edit**

The details box will change to a blue colour which means you can edit the record. You can only amend the detail in the white boxes. Once you have made the changes, click **Save**.



Activating & Issuing Passwords

When a record is created, an individual password is assigned to that record. However, itis not useable until the password is activated.

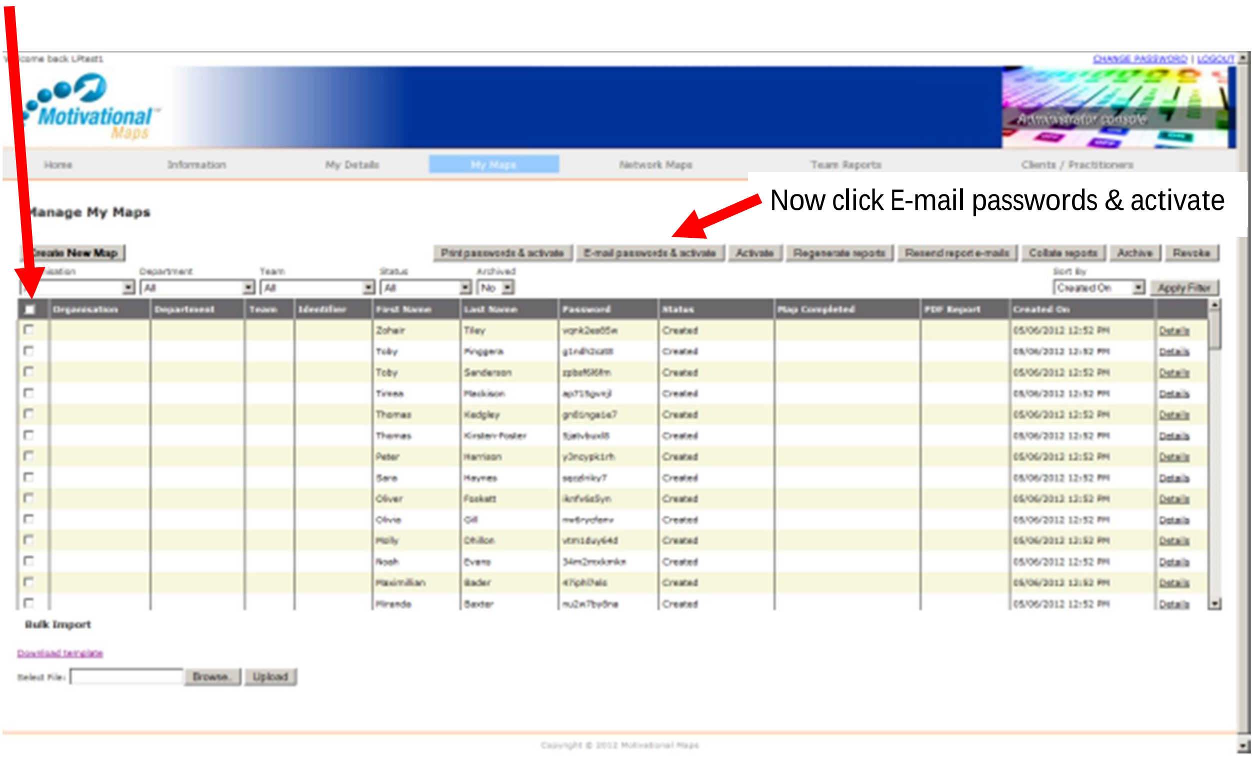
There are 3 ways you can activate a password.

1. **Email Passwords & Activate** – activate the password and emails this to the end user
2. **Print Passwords & Activate** – activates the passwords and produces a pdf document for printing to issue to the end user
3. **Activate** – activates the password but there is no documentation that issues the password to the end user

Email Passwords & Activate

To email a password you must ensure you have noted their email address on the individual record.

Click the boxes for the records that you wish to issue passwords for. If you have multiple records you wish to issue passwords for, use the filter buttons to narrow down the records you need, and then use the checkbox in the header of the table to select all remaining records.

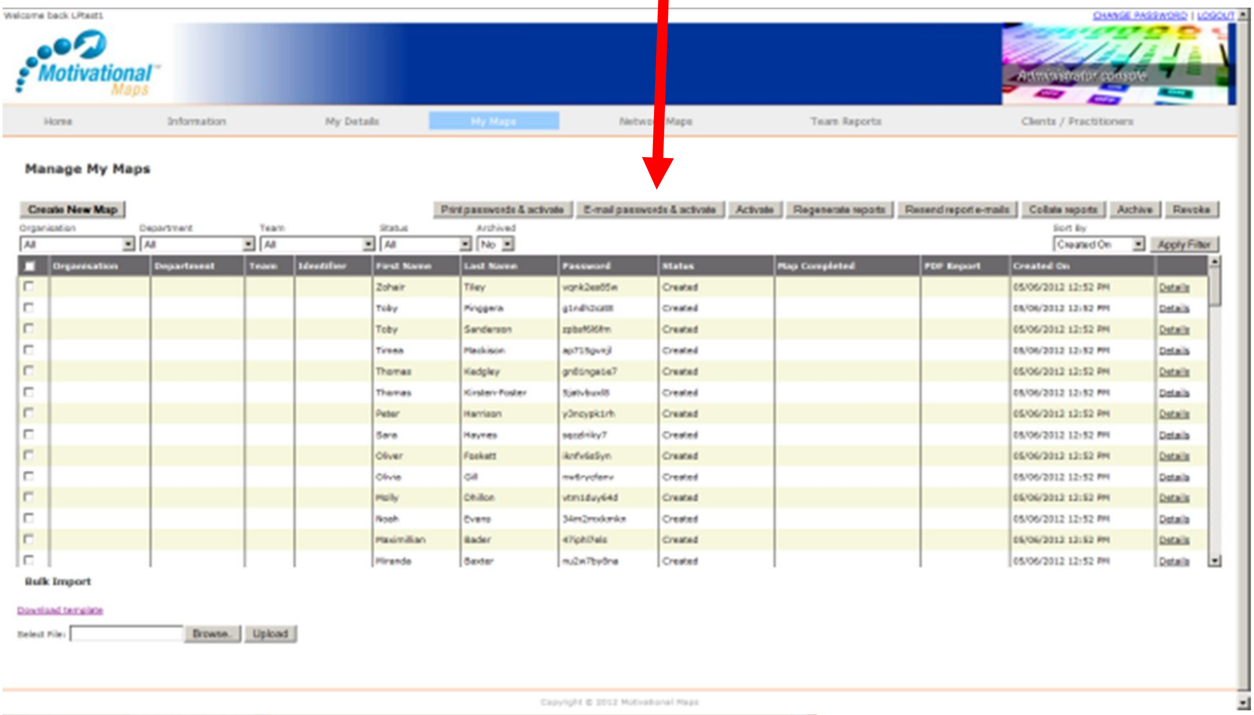


V2 ADDITIONAL FEATURE

Reminder emails will be sent out seven days after maps are activated (if it has not been used). Saving you time and effort.

Print Passwords & Activate

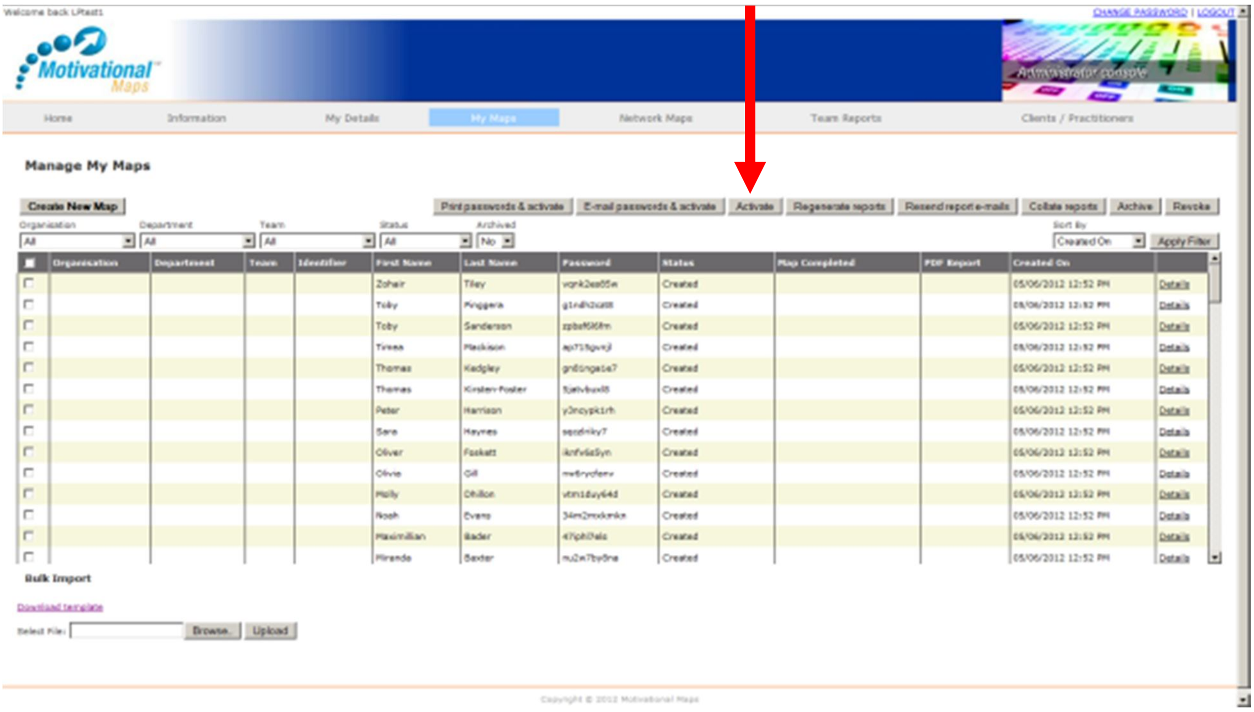
Click the boxes for the records that you wish to issue passwords for, then click **Print Passwords & Activate,** the system will open a new window which contains a PDF with a one page password document for each individual.



You can now **Print** this document, or **Save** it to your own files.

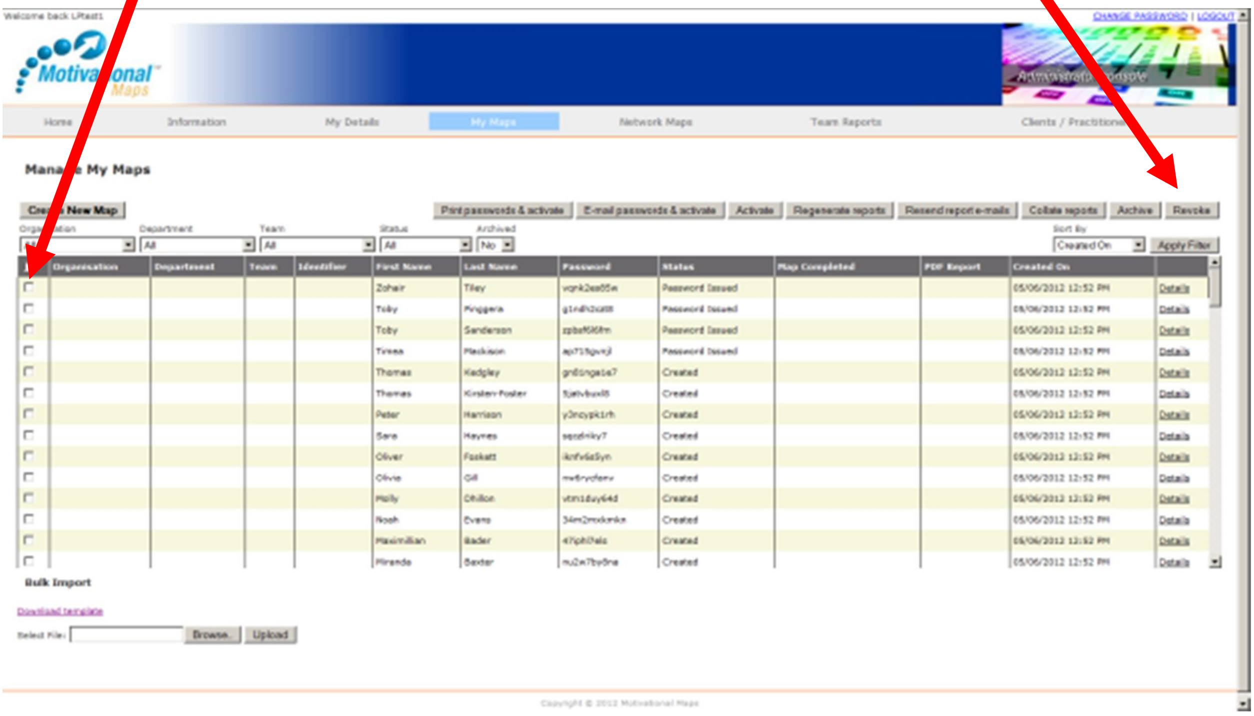
Activate

Click the boxes for the records that you wish to activate passwords for, then click **Activate,** the status will change to activated but there is no documentation that issues the password to the end user.



Revoking Passwords

If you have to revoke a password issued (i.e. it was issued in error, the individual is not going to complete the questionnaire and you wish to reuse the password)
Click the **boxes** for the record(s) you wish to revoke the password for, then click **Revoke.**

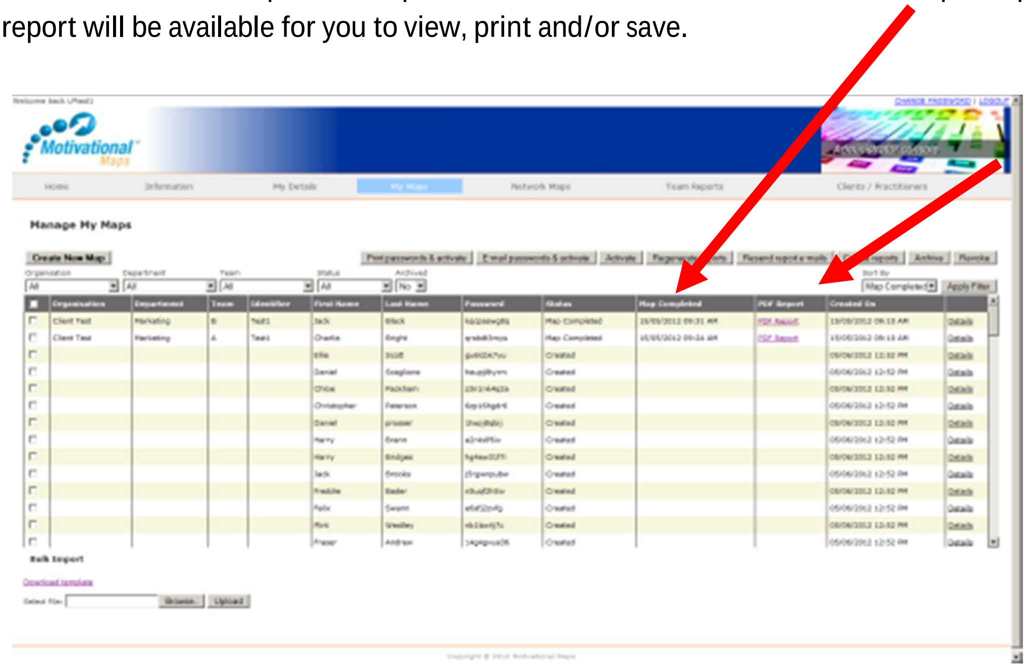


Note: If you are on a Pay As You Go contract the password will be re-allocated to your number of available passwords.

Accessing the Reports

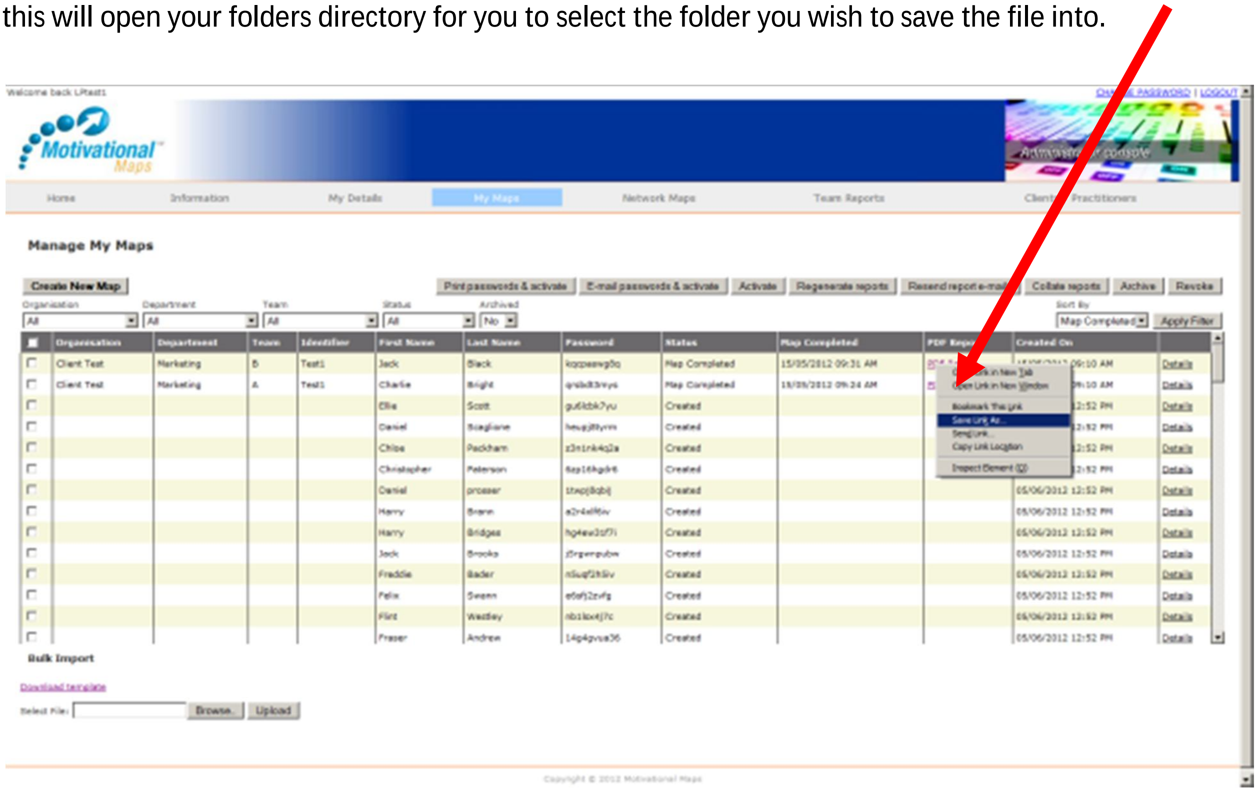
View and Save Reports

Once an end user completes the questionnaire, the record status will show Map Completed and the report will be available for you to view, print and/or save.



To view the reports, double click the pdf report for the relevant record you wish to view.
This opens a separate window, the report is a PDF document which can then be saved to your own files.

Alternatively you can save the reports by right clicking the relevant report and choosing **Save Link As,** this will open your folders directory for you to select the folder you wish to save the file into.

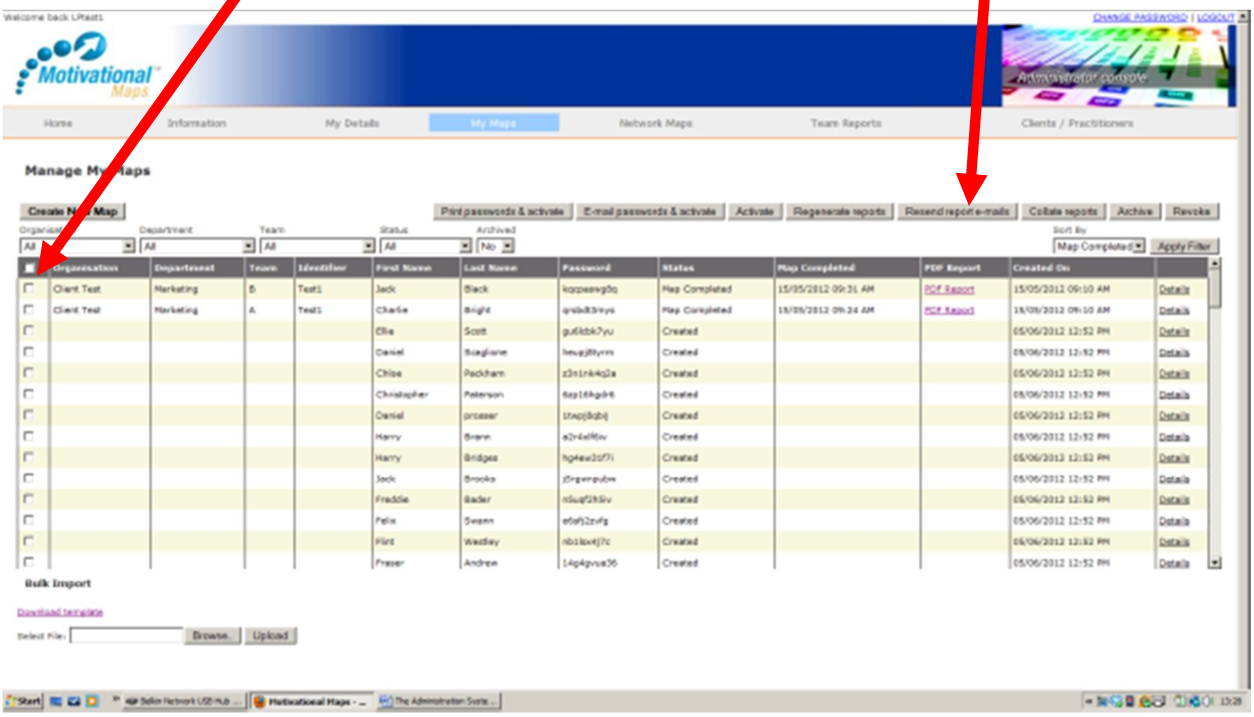


Note: The file has the record number and person name in the title so there is no requirement to rename the file when saving.

Resend Report e-mails

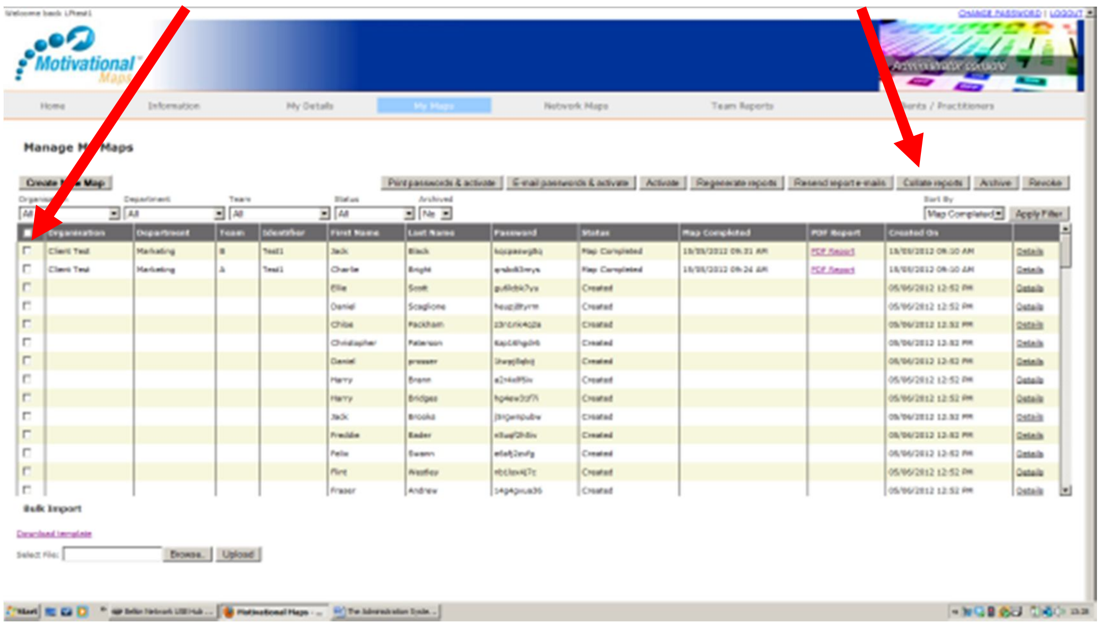
If a report has been issued via email, but you need to issue again, you can re-issue the report with the original email rather than saving the report and attaching to an email.

To do this just select the records you wish to re-issue reports for, and then click Resend report emails.



Collating Reports

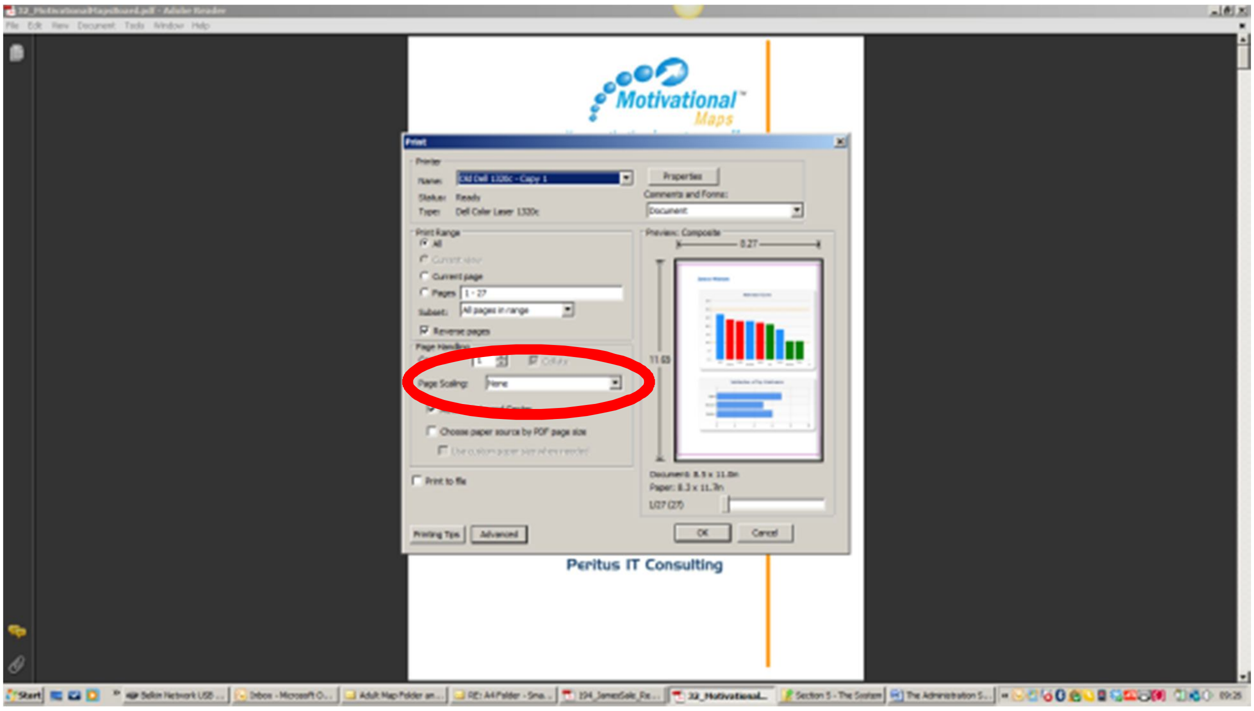
If you wish to print or save a number of reports at the same time, you can collate the reports into one file to save time. This will produce one pdf document which will batch the reports together, therefore enabling you to print or email as one item, rather than saving or printing each individual file. To do this just select the records you wish to collate together, then click Collate reports.



The system will open a separate window which contains one pdf file with your reports added together; this can then be saved or printed.

Printing Reports

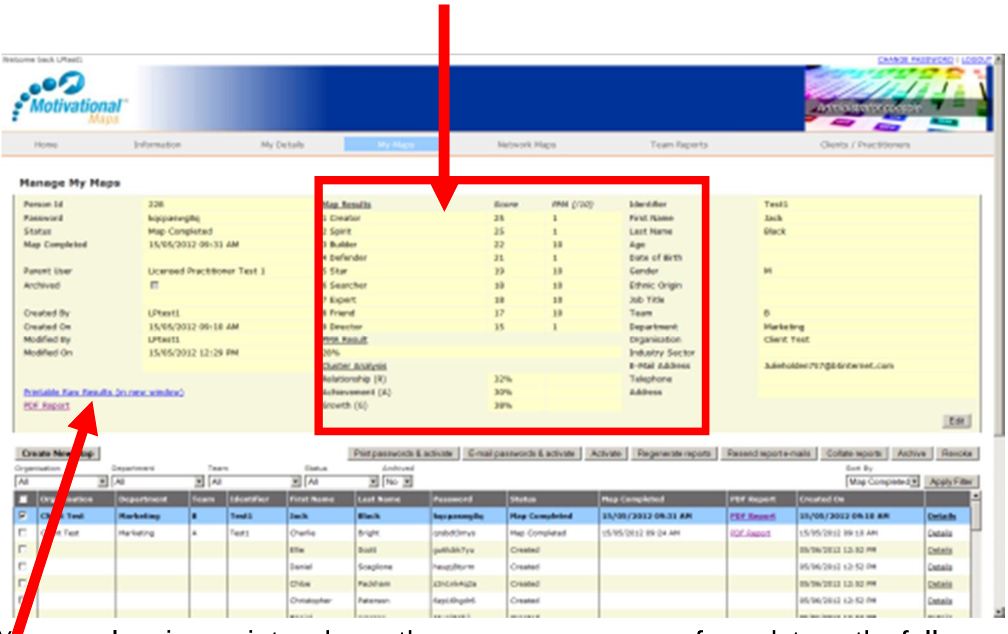
You can print the reports direct from the system or your saved files, in the same way you print normal pdf documents. Before printing please check your print settings. Page scaling needs to be set to NONE. Most systems will default to Fit to printable area



If you do not change this setting you will see a black horizontal line at the top and bottom of each report.

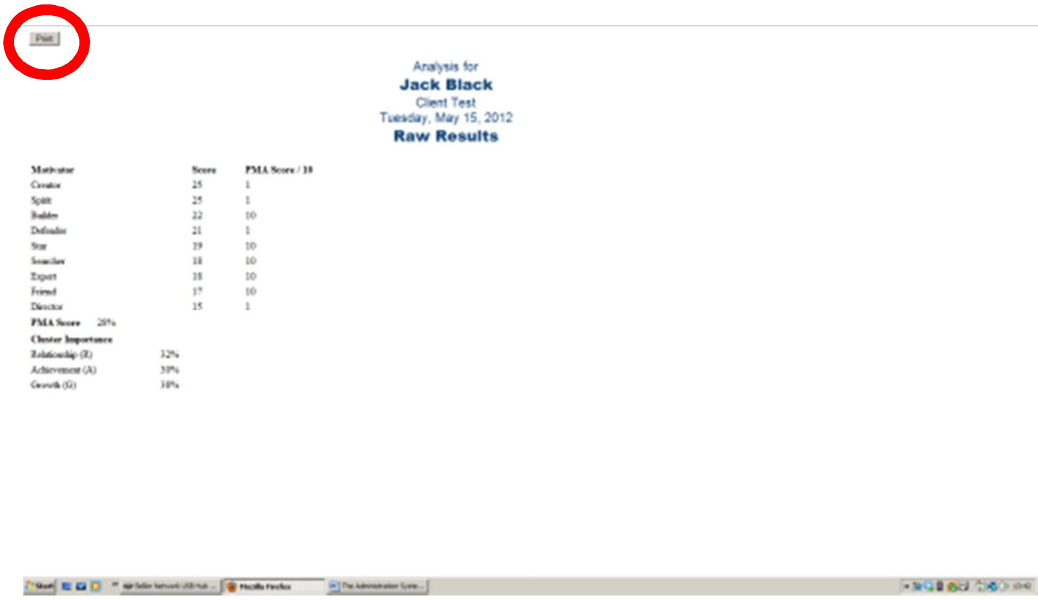
View summary of results

To view a summary of the results for an individual, click on **Details** to open their individual record. The raw data is noted in this section here.



You can also view, print and save the one page summary of raw data or the full reports from this screen.

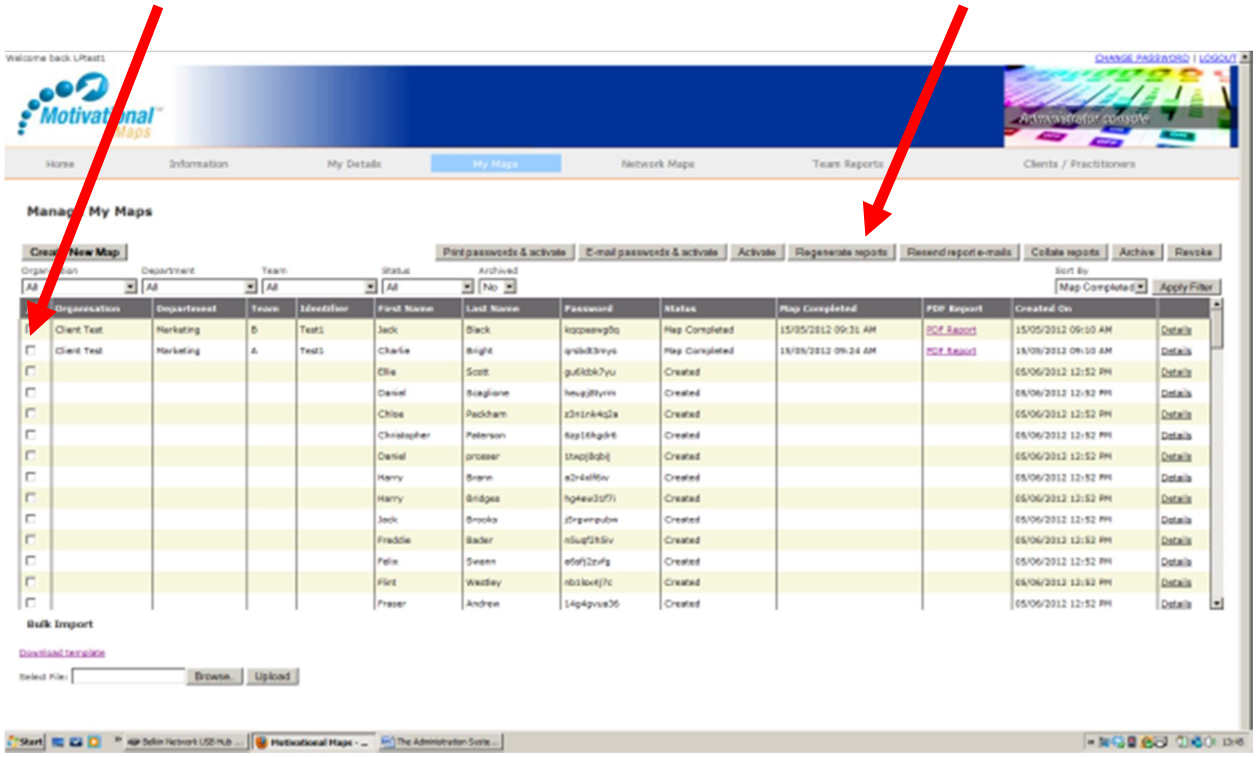
This will open a new screen with a print option, enabling you to print the raw data for your own records/analysis without having to print the full report.



Regenerating Reports

Sometimes you may need to regenerate reports, for example you may have entered an individual or company name incorrectly and this is showing incorrectly in the reports. Regenerating reports is easy and does not take a lot of time.

Click the records that you want to regenerate the reports for then click **Regenerate Reports.**

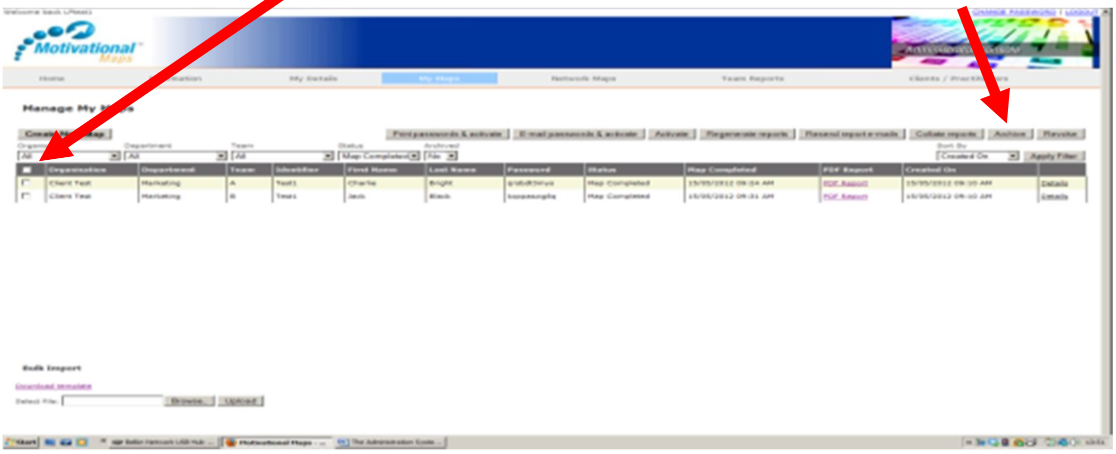


The system will display a message at the top of the screen confirming the number of reports it has regenerated.

Archiving Reports

Archiving reports is really important, otherwise your screen will become very busy and full of data that is not accessed/required. It is good practice to archive records that you will not need to access in the foreseeable future, every month.

To archive records, just click the records that you want to archive and click **Archive.**

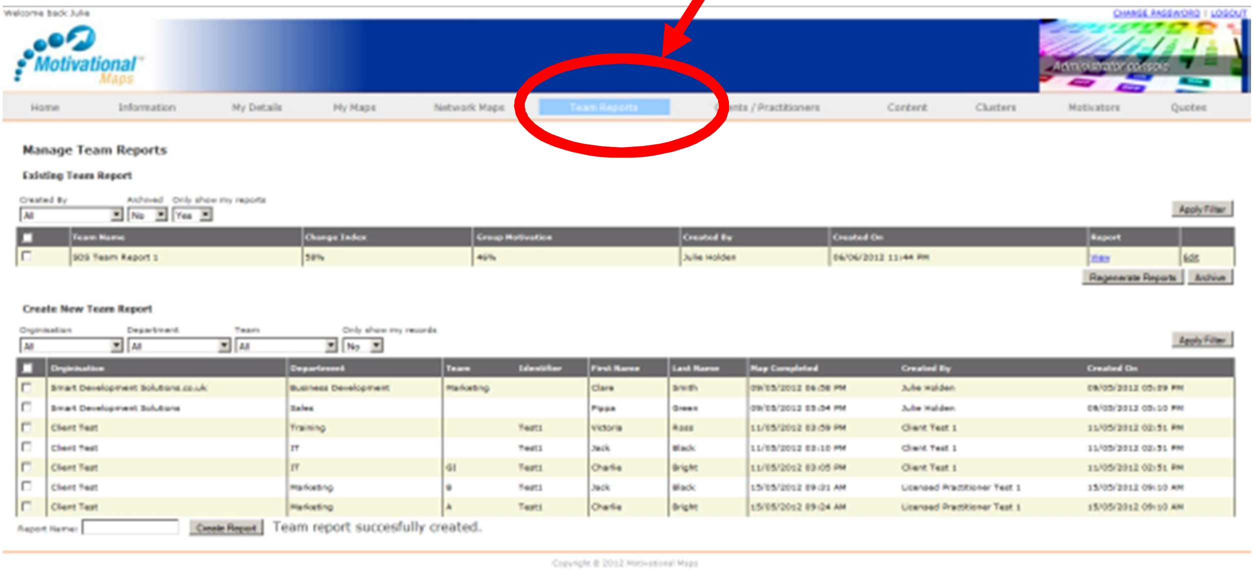


Don't worry, you can easily access archived records and de-archive them placing them back into the current records.

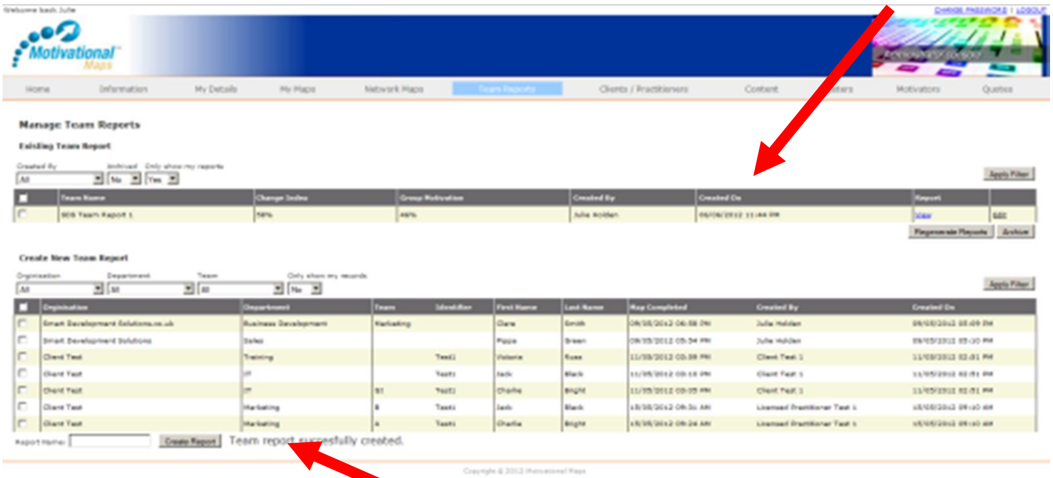
To view your archived folders, filter using **Archive, Yes.** If you want to place an archived record back into your current records, click the records you want to identify and click **Archive**, the records will move from the archived folder to the current records folder.

Producing Team Reports

All team reports are produced and held in the **Team Reports** screen.



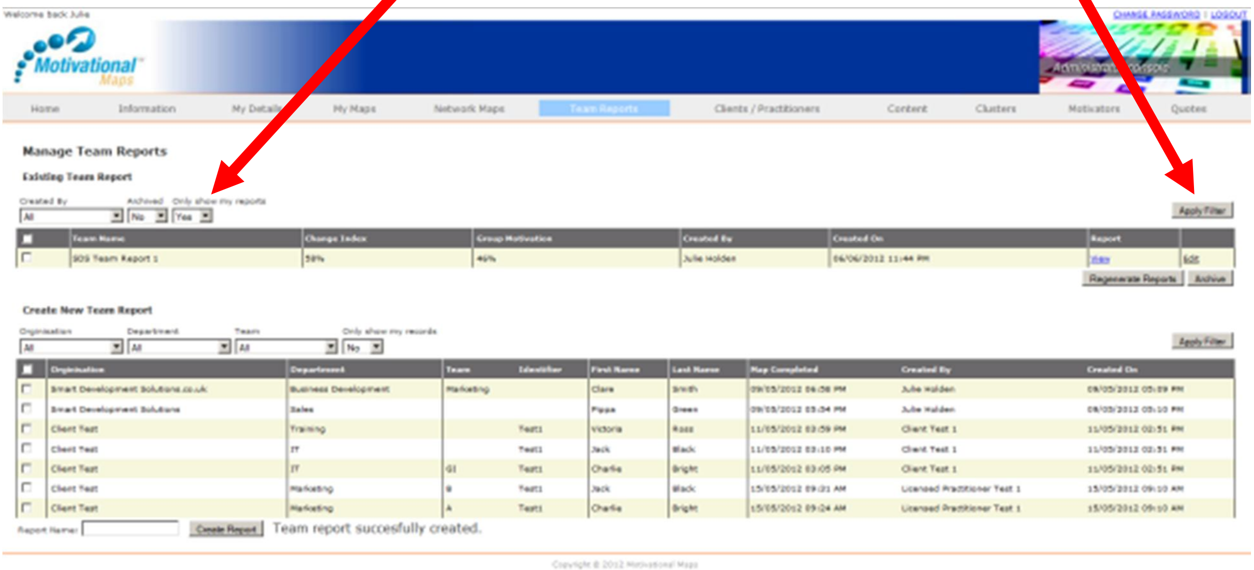
The Team Report page, has two elements to it, it stores the team reports you have created.



And it has a copy of all individual records for you to create new team reports.

Viewing records

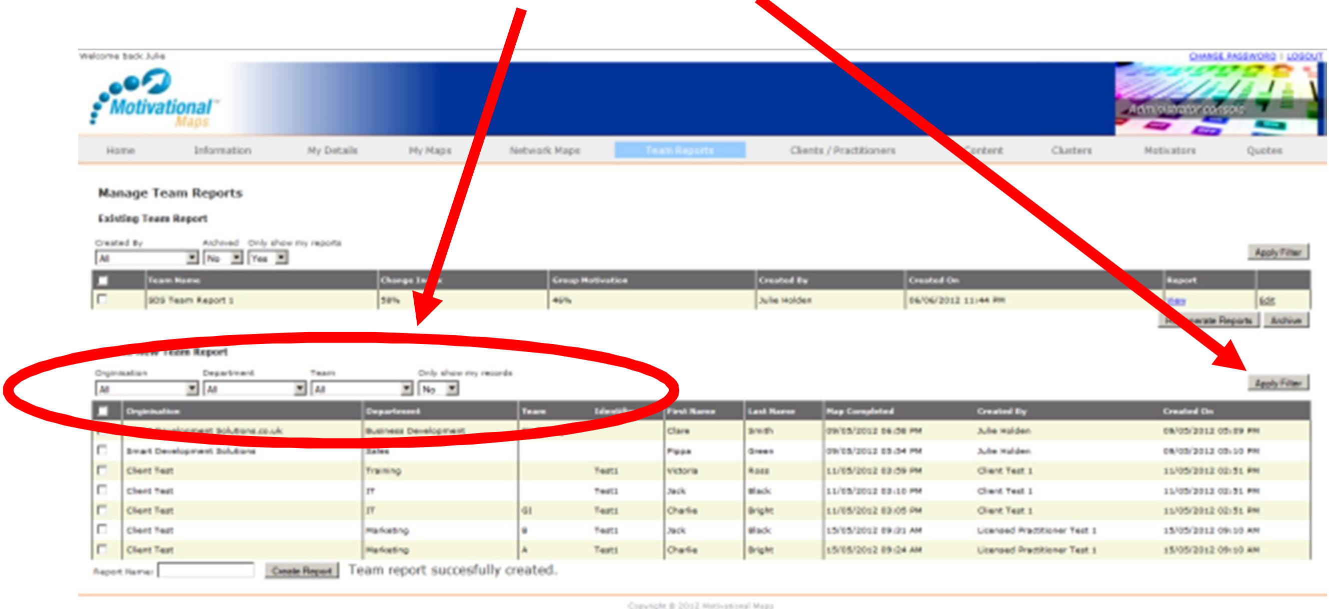
If you are a Business Practitioner or a Licensed Practitioner, this screen will automatically only show the team reports and person records of **YOUR** clients. If you need to view the records of those in your network, amend the drop down box “Only show my records” to **NO**, and then click “**Apply Filter**”.



The Team reports and person records are separate elements within this area of the system, so you will need to apply this drop down to existing Team Reports and to the individual records if you want to create a new team report using the data/client records from your network practitioners.

Creating a team report

Creating a team report is very quick and simple, first filter the individual records to narrow down the number of records displayed. Remember to click **Apply Filter** once you have selected the criteria.



Select the individual records that are to be included in the Team Report

Enter the **Report Name** of the team report, (note: this will appear on the front page of the Team Report) and then click **Create Report**

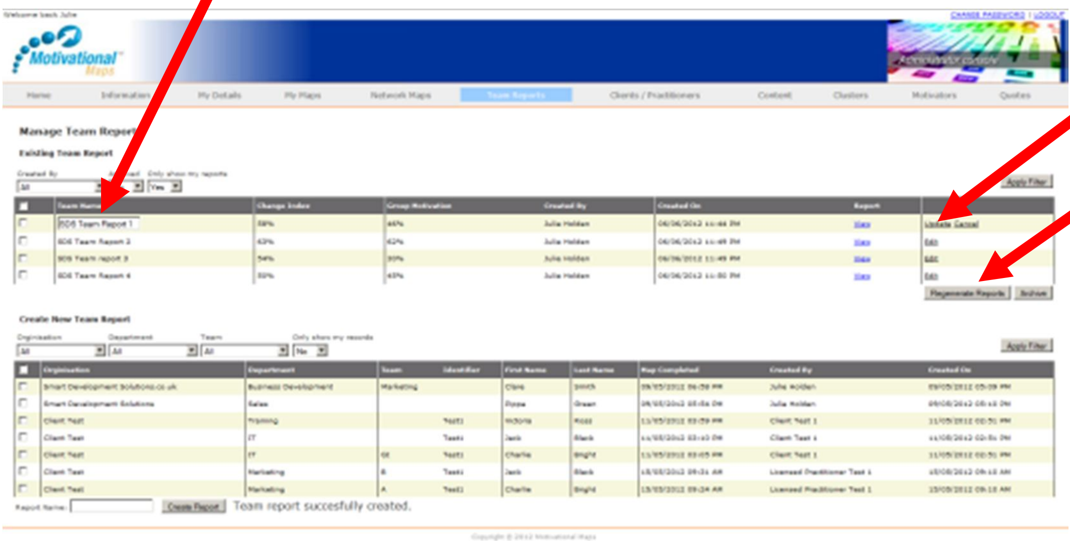
V2 ADDITIONAL FEATURE

Adding the individual data pages after the team spread sheet is now optional. Select team members in the usual way but if you wish to include the individual pages please tick the box provided

A message will display by the Create Report button to confirm the report has been successfully created and the report will be placed in the list of Team Reports; you can view, edit or print the report from this area.

Amending an existing team report

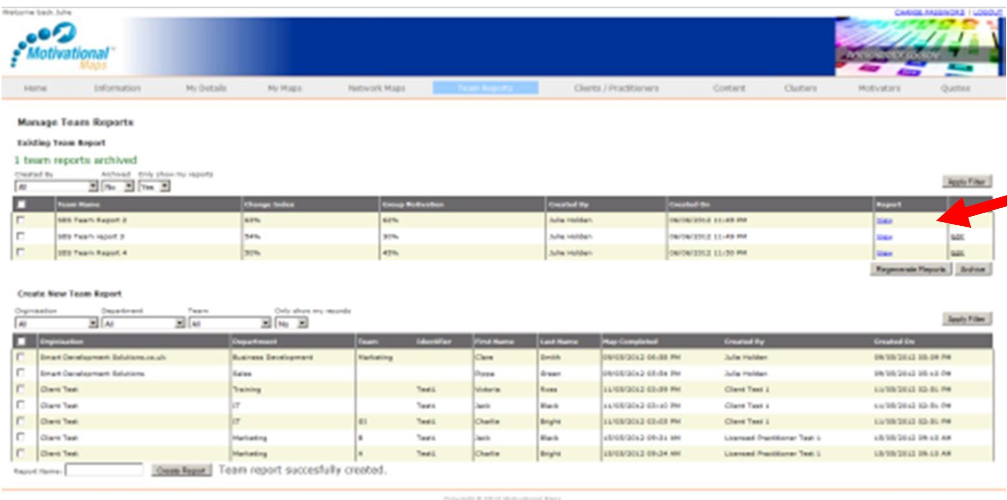
Once you have created a Team Report, you can amend the name of the report, by clicking on Edit. This will open the **Team Name** box for you to make any amendments.



Once you have amended this, click **Update** and then click **Regenerate Reports** to finalise the process.

Note; you are not able to amend the individual records included in the report. If you wish to add others or remove individuals from a team report, you must create another report.

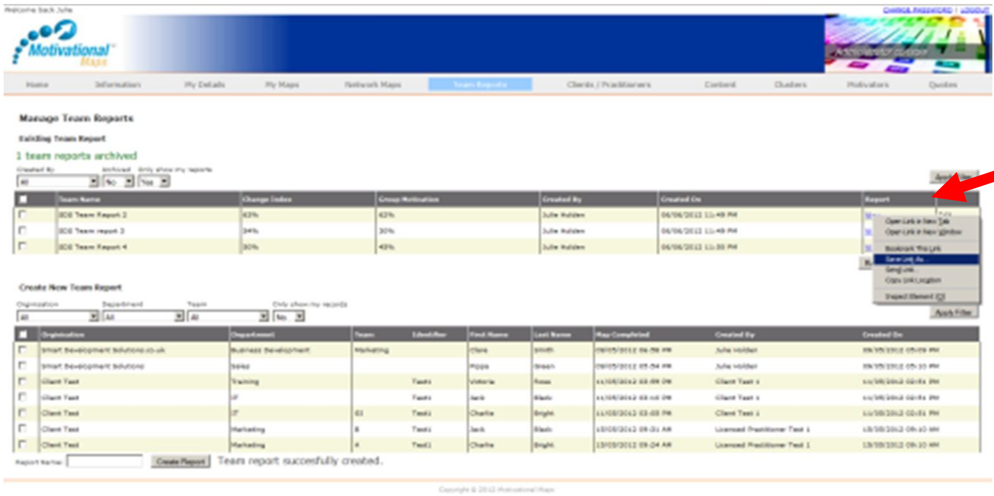
View, print and save reports



To view a team report, click on **View.** This opens a separate window, the report is a PDF document which can be printed or saved to your own files.

V2 ADDITIONAL FEATURE

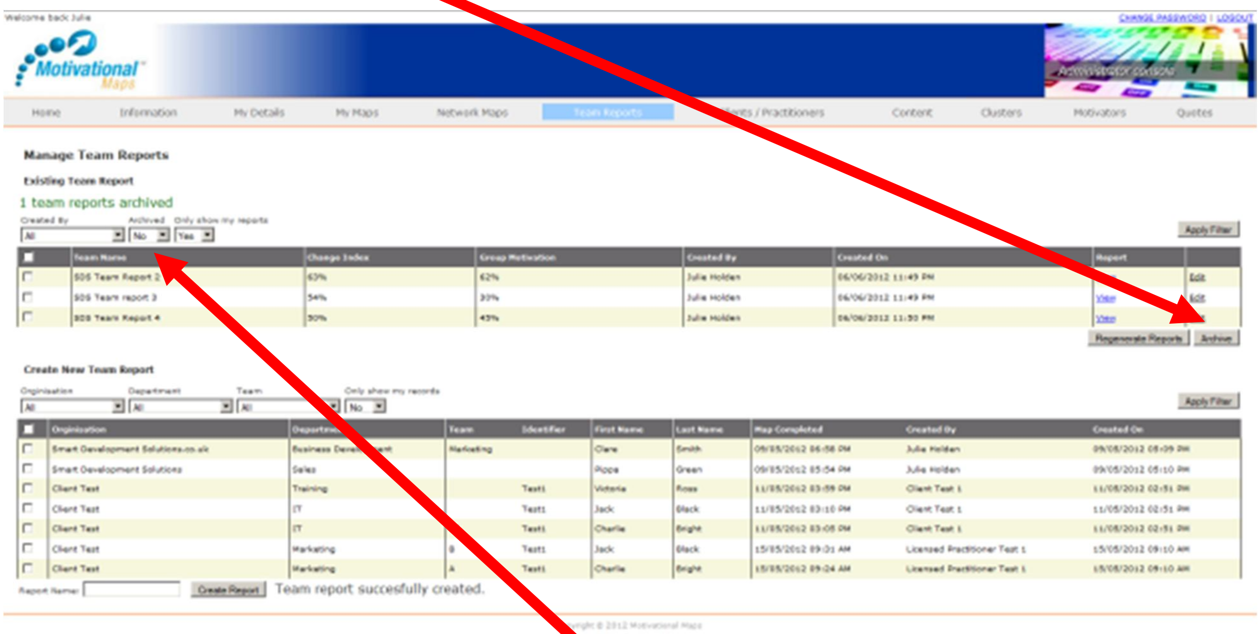
An html version of the Team Data Table is available as a separate option – this can be easily copied into other ptogrammes.



Alternatively you can save the report by **right clicking View** and choosing **Save Target As**, this will open your folders directory for you to select the folder you wish to save the file into.

Archiving team reports

The Archive process for team reports is the same as for individual reports. Check the report(s) you wish to archive and click **Archive**.

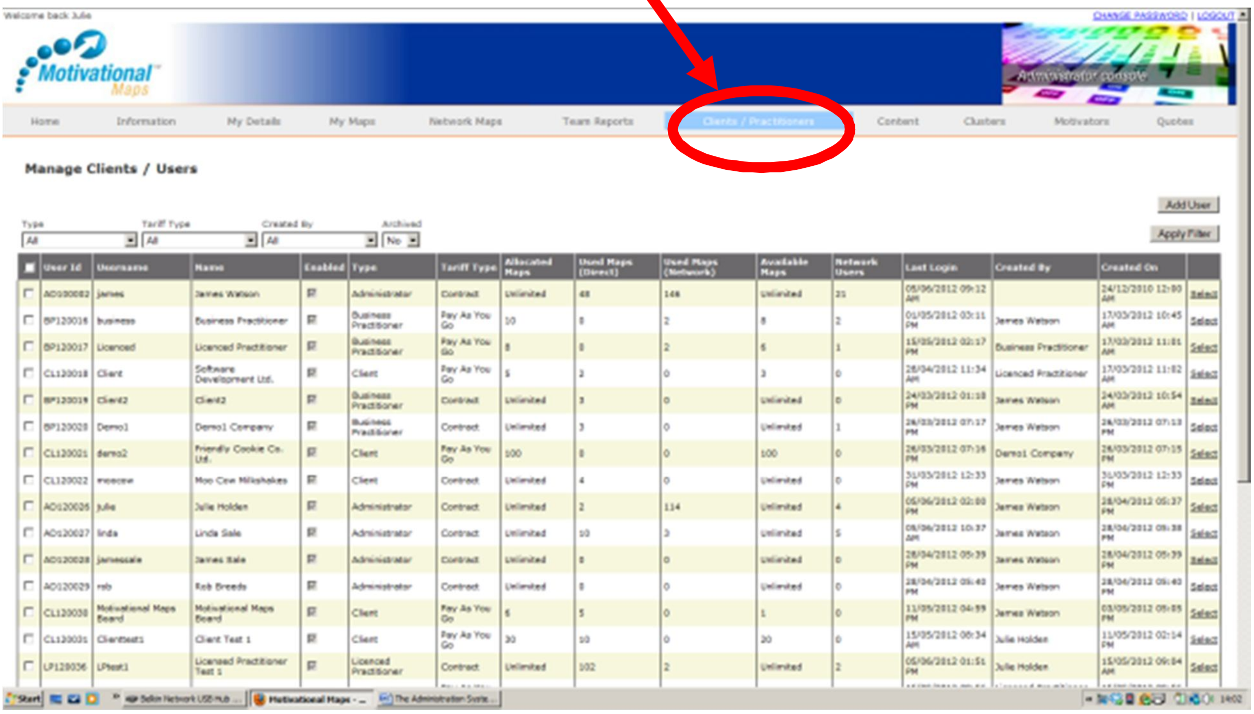


To view your archived Team Reports, filter using **Archived, Yes.** If you want to place an archived record back into your current records, check the records you want to identify and click **Archive**, the records will move from the archived folder to the current records folder.

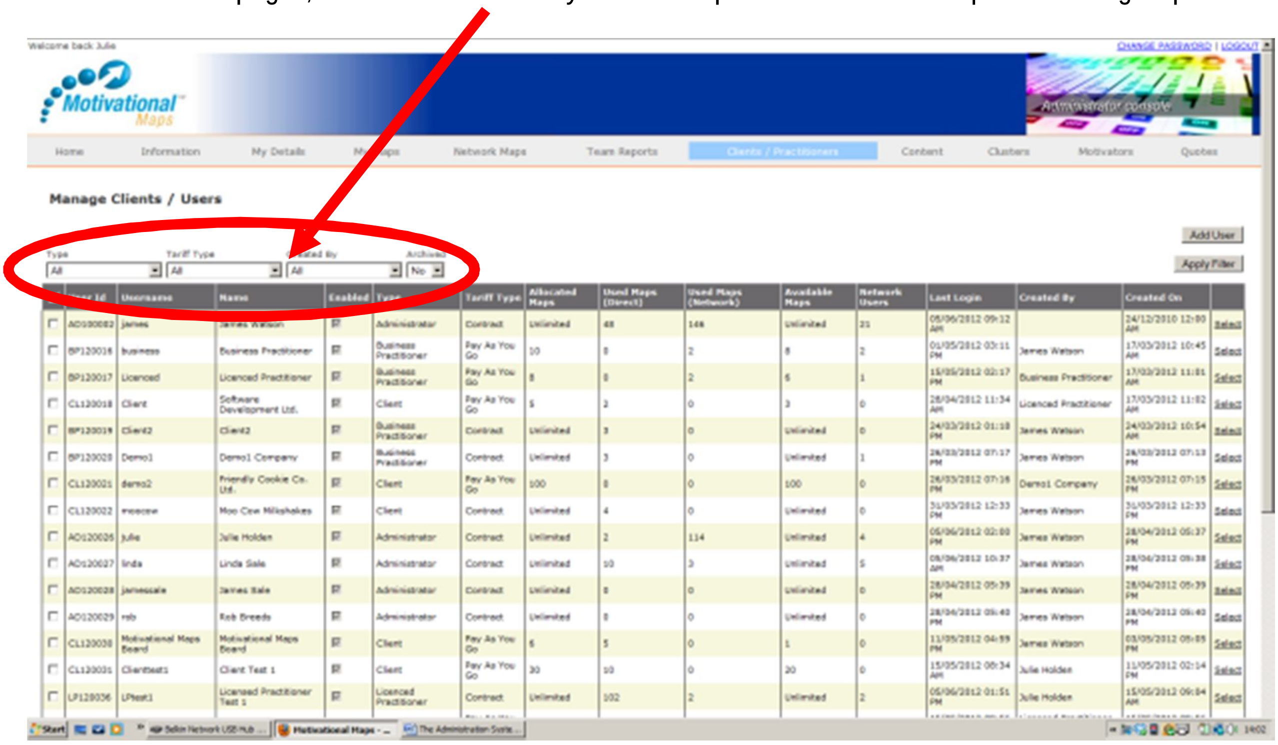
Managing Your Network

This part of the system is only accessible by Business Practitioners or Licensed Practitioners. This is where you will create records for your sub-licensees and clients. If you are a client practitioner, you will not see this tab on your system.

To enter this part of the system click on **Clients/Practitioners**



As with the other pages, there is a filter facility to enable quick identification of practitioner groups.



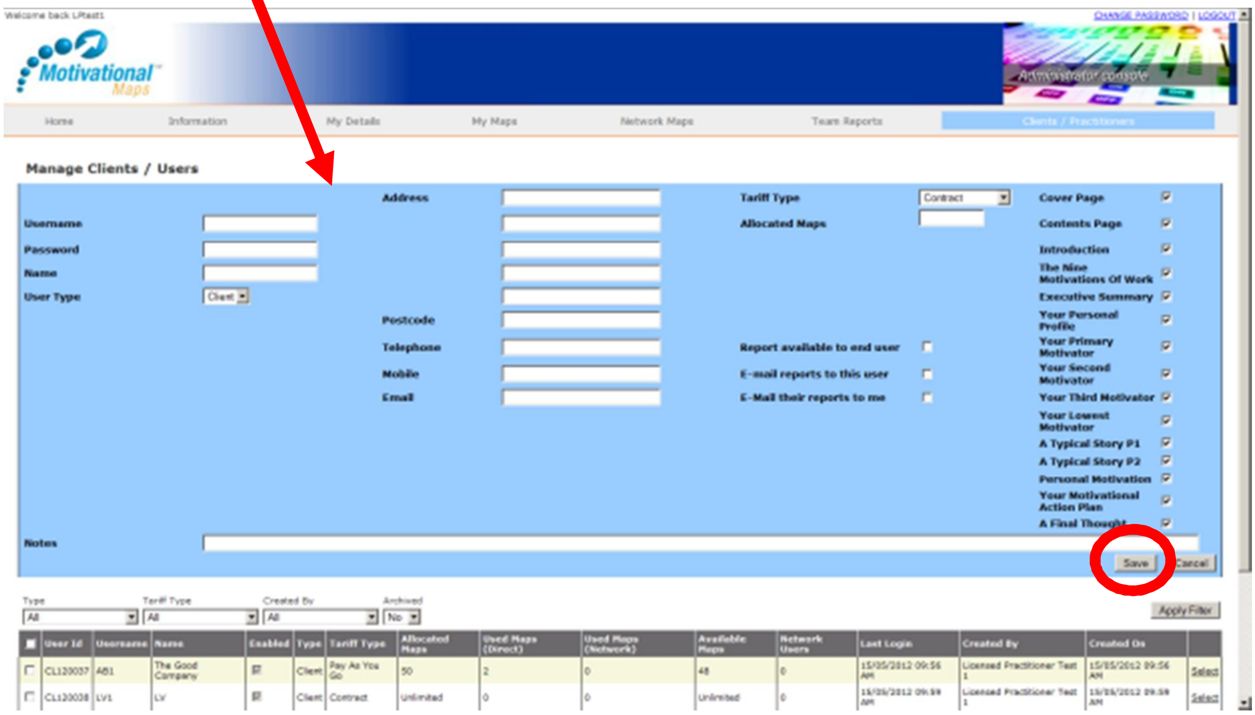
The front screen provides a summary of all sub licensees within your network. A description of the information provided in each column is detailed below.

Column Title	Description
User ID	This is automatically issued by the system and is unique to each user created
Username	The username that will be used to log into the system
Name	The company name
Enabled	Indicates whether the system is enabled for this user – checking this box enables you to disable the system (i.e. if a user has not paid for passwords used, or does not renew the annual license)
Type	Defines the type of license they hold i.e. **Business Practitioner:** Distribution of maps direct to end user and the ability to sub-license other users. Individual and Team Reports available. **Licensed Practitioner:** Distribution of maps direct to end user and to set up Clients on the system, but no facility to sub license. Individual and Team Reports available. **Client:** Distribution of maps direct to end user but no facility to sub license or produce Team Reports.
Tariff Type	Defines the type of payment tariff the practitioner is currently contracted on: **Pay As You Go -** Purchases and pays for individual map password as required **Contract -** Monthly fixed fee for fixed number or unlimited passwords
Allocated Passwords	Defines the number if passwords have been allocated to that user. This will show a specific number if the user is a PAYG or Contract user with a fixed number, or Unlimited if they have an unlimited contract.
Used Passwords (direct)	Number of passwords issued by you
Used Passwords (network)	Number of passwords issued by practitioners within your network
Available Passwords	If you are on a Pay As You Go Contract, this will show the number of passwords that are still available to be issued, if you are on a Pay Monthly contract this box will be blank
Network Users	The number of sub licensees within your network
Last Login	Date and time of last login for that user
Created By	Username of the licensee who created that user record, i.e. the parent user
Created On	Date and time the user record was created

Creating a new Practitioner or Client record

To add a new practitioner click **Add User,** a blank user record will appear.

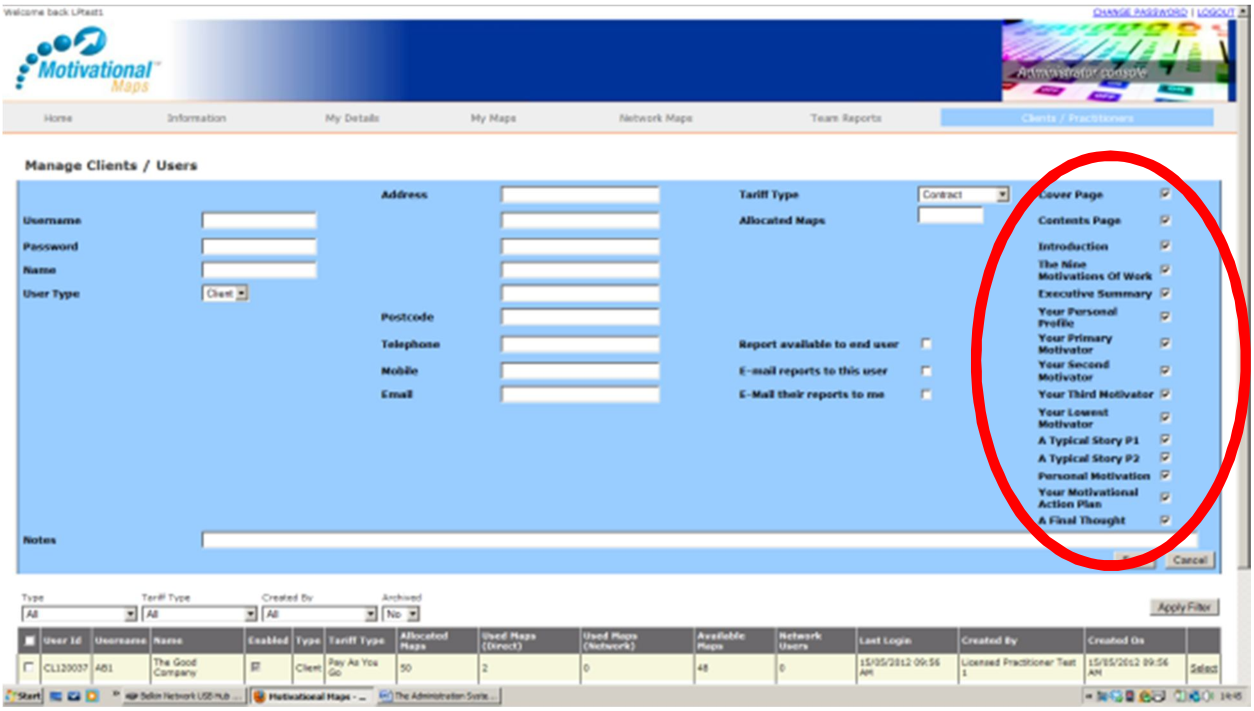
Populate the white boxes with the relevant information. Don't worry if you do not have all of the information, the practitioner will be able to amend their details when they access the system. When you have populated these fields, click **Save** to finalise the record.



Most of the information required is self explanatory; however a description of some of system specific information required is detailed below.

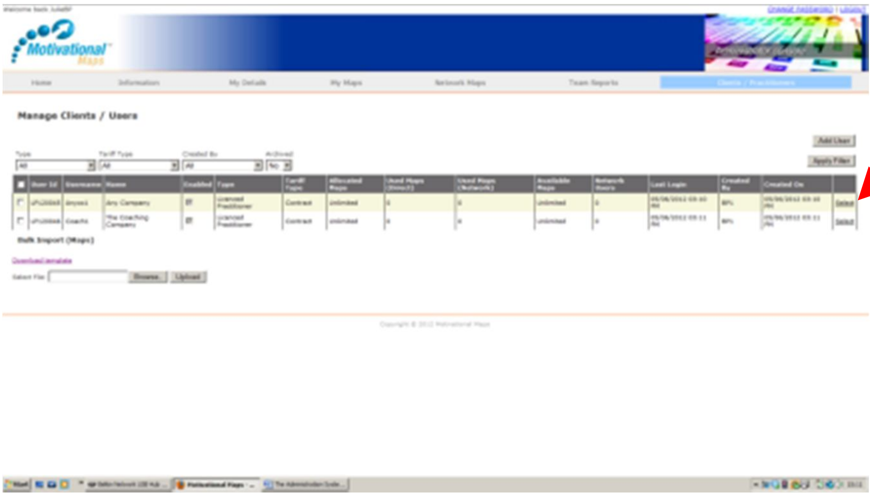
Username	Keep the username simple and relevant to the individual or to the company name.
Password	We recommend you allocate a simple password (i.e. companyname1 or password1) and encourage the user to change their password when they first access the system.
Name	Enter the company name, not the name of the licensee
User Type	Defines the type of practitioner license they hold; **Business Practitioner:** Able to sub-license other practitioners and facility to produce Team Reports **Licensed Practitioner:** Distribution of maps direct to end user and facility to produce Team Reports, but no facility to sub license. **Client Practitioner:** Distribution of maps direct to end user but no facility to sub license or to produce Team Reports
Notes	This is where you can write any additional notes relating to that licensee. For example, if you have trained a number of people in one company to be "practitioners", it would be useful to note their names here so that you have a record of the practitioners in that company
Tariff Type	Select the type of tariff the practitioner is operating within: Contract or Pay As You Go.
Allocated Maps	Defines the number of maps allocated This will show a specific number for PAYG or fixed contract . Please note this figure is cumulative, therefore each time you add maps to this type of tariff account, increase the number of maps by the amount the user has purchased. (I.e. if they had 50 maps and they purchased an additional 25, amend this figure to 75.) For Unlimited contracts, this will always show unlimited
Report available to end user	The end user (the person who has completed the questionnaire) will receive a copy of their report automatically upon completion of the questionnaire.
Report available to this user	This practitioner will receive a copy of the end user report once they have completed the questionnaire. They will also receive an email with the raw data information for the end user, enabling them to analyse the data without having to print the fill report.
Email their reports to me	You will receive a copy of the end users report once they have completed the questionnaire. You will also receive an email with the raw data information for that user, enabling you to analyse the data without having to print the full pdf report.

When you set up your Clients/Practitioners, you can determine which pages of the report are switched on and off. The system will automatically default for all pages to be included in the report, if you do not want a page just uncheck the box. However, please be aware that a Client/Practitioner can amend this from the My Records screen. This functionality is provided so that you can administer client and practitioners records without the need for logging into the system via a separate password and not for limiting access to the system.



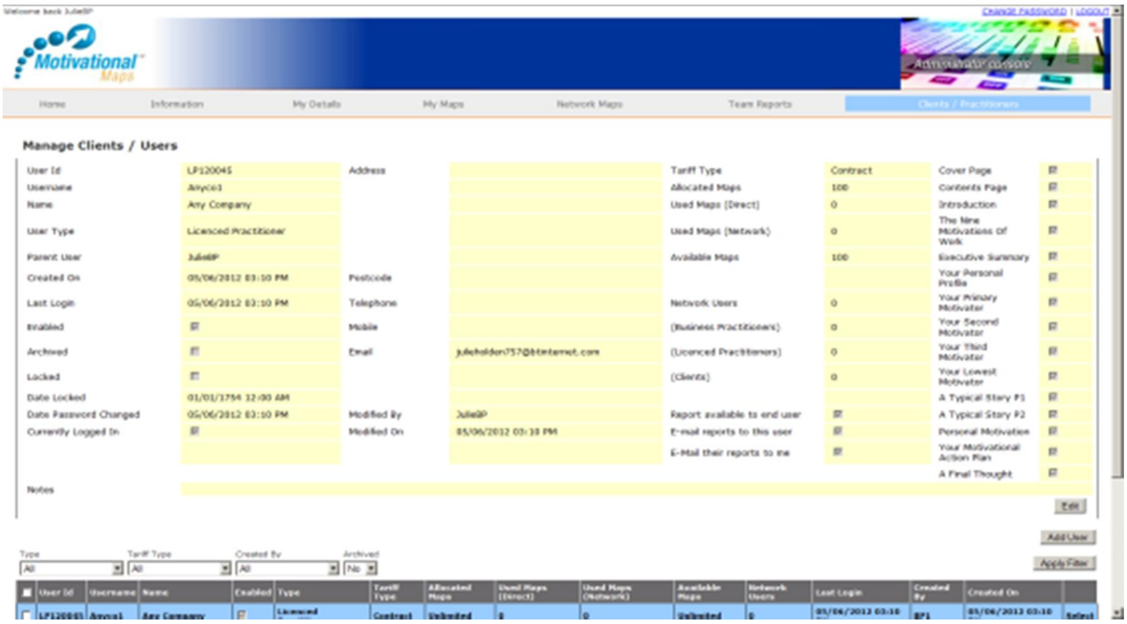
Accessing a Practitioner Record

Sometimes you may need to access a practitioner record to view their history etc. You can access their record in the same way that you would an individual record.



To view the record for a specific user, **Select** the record you wish to view

The practitioner record will appear providing you with all the detail & information about the activity of that practitioner.

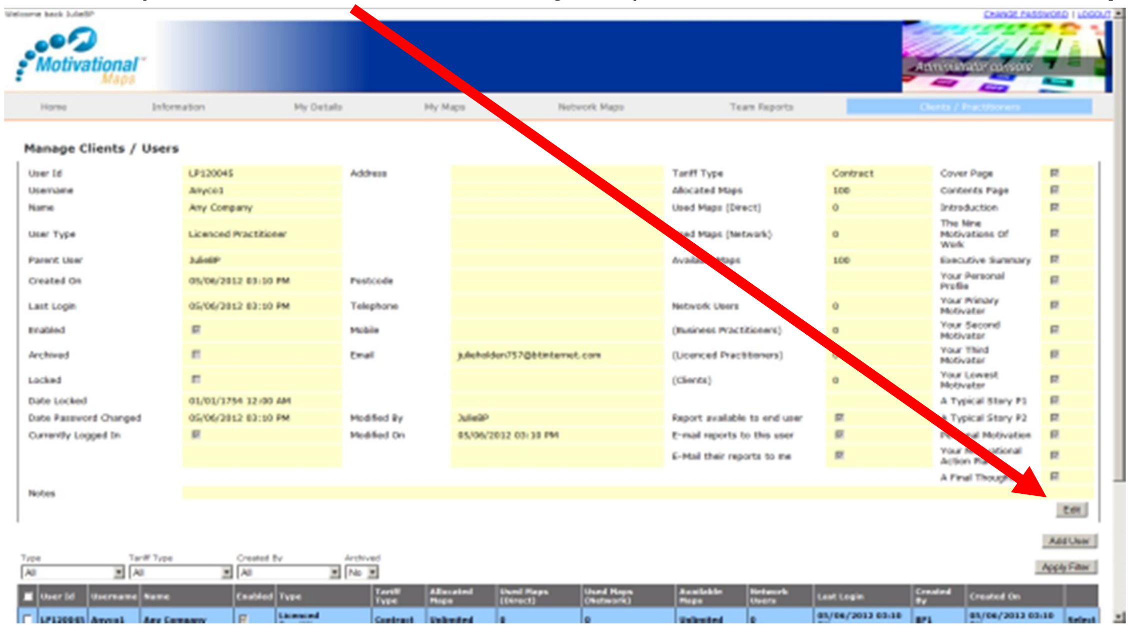


Most of the information shown on the record is the information you input when you created the record, but with a few additional areas:

Enabled	Indicates the account is enabled, click here if you need to disable the account
Archived	Indicates if the account has been archived.
Locked	Indicates if the account has been locked (i.e. the user has entered an incorrect password to many times to access the system. If a tick is in this box, the account is locked, to unlock the account click on the box to remove the tick.
Used Maps (Direct)	The number of map passwords that have been issued directly by you to clients or Licensed Practitioners
Used Maps (Network)	The number of map passwords that been issued by users within your network
Available Maps	The total number of maps available to you. If you are on an unlimited contract this will be "Unlimited". If you are on a fixed or PAYG contract, this will is the difference between the number of maps purchased and the number used.
Network Users	The number of other practitioners in your network, these can be Clients and/or Licensed Practitioners
(Licensed Practitioners)	The number of Licensed Practitioners in your network
(Clients)	The number of Clients in your network

Editing a practitioner record

To edit a practitioner record, select the record you wish to view by clicking **Select** for the practitioner record from your list. Click **Edit**, make the changes required to the relevant fields, then click **Update**

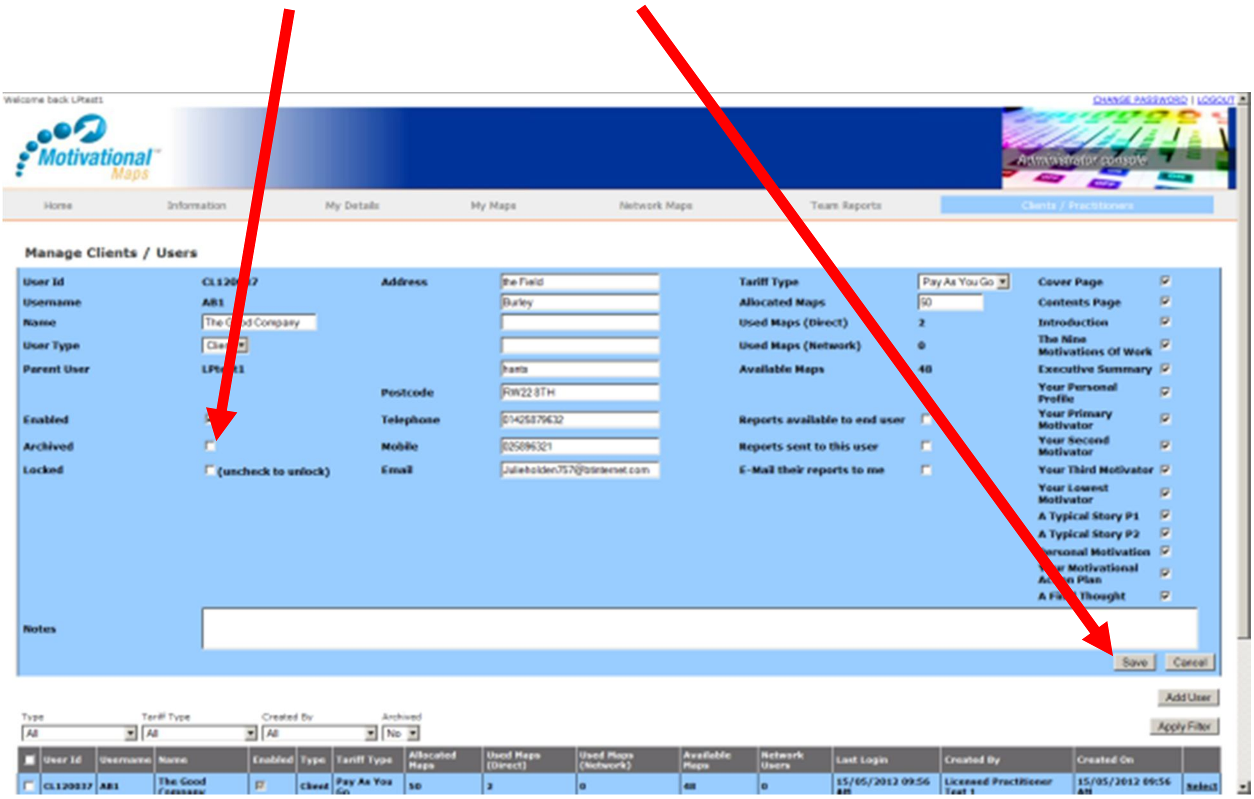


V2 ADDITIONAL FEATURE

Addition of a 'License Adjustment' box - this is where you can now add maps to clients and practitioners - their total will then be adjusted automatically

Archiving a practitioner record

To archive a practitioner record you must first select the individual record using the process above, check the **Archived** box and then click **Save** to finalise the process.



If you wish to remove a record from archive, follow the same process and check the box to remove the tick, the record will then be placed back into your list of current practitioners.

V2 - ADDITIONS TO MOTIVATIONAL MAPS ADMIN SYSTEM

FACE VALIDATION

Based on our survey of practitioners more validation of the effectiveness of Motivational Maps was requested. Everyone who completes a Map will be asked to complete a survey to help us gather vital information.

A feedback request e-mail will be sent seven days after the map is completed directing the user to a web site form containing six simple questions that will take only a few minutes to complete.

The follow-up email and survey have been carefully prepared with advice from researchers experienced in feedback and validation. As we build the data set, we will share the results and analysis with you.

No personal data is collected, stored or used, and no practitioner, client or prospect is contacted in any sales or marketing activity. The survey is purely for data collection about how people rate the Map.

IMPROVED MAP QUESTIONNAIRE

Practitioners and clients will benefit from our continued focus on making all aspects of the system easier and quicker to use.

We took advice from user experience experts who pointed out that research shows 'semantic differential surveying' reduces cognitive load. In other words, a more effective way to discover a person's preference between two statements is to show a range of positions and allow them to choose one. This ensures they focus on the statements rather than the scoring mechanism.

The questionnaire page will now show the two preferences either side of a graded scale and the user indicates their score by selecting a radio button. The underlying rating is identical to the existing system but the way it is now presented is easier to comprehend and is familiar to anyone who has completed a typical online survey.

REMINDER EMAIL

Reminder emails will be sent out seven days after maps are activated (if it has not been used). Saving you time and effort.

EMAIL OVERRIDE

It is now possible to override your usual email settings - if you choose not to send reports directly to end users you can override this at any point by selecting records and using the email override button - this will then send reports to the end user directly from admin.

Addition of a **'License Adjustment'** box - this is where you can now add maps to clients and practitioners - their total will then be adjusted automatically

TEAM REPORT

Adding the individual pages after the team spread sheet is now optional. Select team members in the usual way but if you wish to include the individual pages please tick the box provided

A minor change to the layout of the team report, so as to show the team members in three columns

A html version of the team data table

Filtering on the maps that can be added to a new team report

The Team Report cluster analysis now includes the concept of no dominance

Added sort by function to team report page

Additional Support

For additional support, or if you have any questions not covered in this manual, please contact us and we will be happy to help you. Our contact details are:

01202 513043

Email

Support@motivationalmaps.com