MetaRasa.Biz

Members’ User Guide

To read this document in *full screen*, press **<Ctrl> L** and use the arrow keys to move to the next page. You can exit *full screen* mode by pressing **Esc**.

Contents

Registration

The registration page can be found at https://www.metarasa.biz/member/register/

All items marked with a red asterisk (*) are mandatory. You can change most of these registration items once you have registered – the exception being your username.

Your email address will only be used to administer the site and will not be published on any web pages or used for marketing.

In the MetaRasa.Biz system you will have a public profile page. This is so that people completing a survey can see who is administering it and contact you.

The registration items that will appear on your public profile include: your name, company URL, organisation, and (professional) postal address. After you have registered, you will also be able to add other information to your profile.

The registration form includes two telephone numbers. The mandatory telephone number will not be published but is for our use if we need to contact you, e.g.: in connection with your registration. If you include an optional telephone number, this will appear on your public profile.

There is also a box that asks if you would like to be able to receive email via your public profile. If you say yes, your profile will include a link to an online contact form that uses encryption, and other anti-spam measures, so that your email address is kept private.


* Telephone - for site use only
Your telephone number. This is for security and support purposes and does not appear on your public profile. We may need to call you if there is problem with your application to the site or there is a support issue we need to discuss with you.
+44 (0) 151 xxxxxx
Telephone - to appear on your public profile
This is an optional contact telephone number that will appear on your public profile.
* Accept External Email?
Do you want to accept email via your public profile (this will be via a form in which your email address is protected via encryption, and there is a 'captcha' image to avoid web-form spam).
No
Preamble for your external email form
The information you enter here will appear on your public email contact form (if you have said 'yes' to email from non-members).
Terms of Service

When you have completed the registration form you will need to enter the word in the box (which is one of our anti-spam measures). Also, tick the box to show that you have read all the terms of service and agree to them. Then press the submit button.

After you have submitted the registration we will review it. Providing you have provided complete and valid information your application should be approved within a couple of working days. We will send you an email to confirm that your account has been activated, at which point you will be able to start creating survey projects.

Setting up the rest of your account details

Once your account has been activated, you can log in by going to https://www.metarasa.biz/member/profile/

The first screen that you see will contain messages from site support. The menu to the left of the screen enables you to administer your account and change the way that your public profile appears to those who complete your questionnaires.

The Public Profile can include a company logo, photo of you and bio. If you are dealing with a variety of clients, this profile can help provide the right professional image and reassure those who are completing your questionnaires.

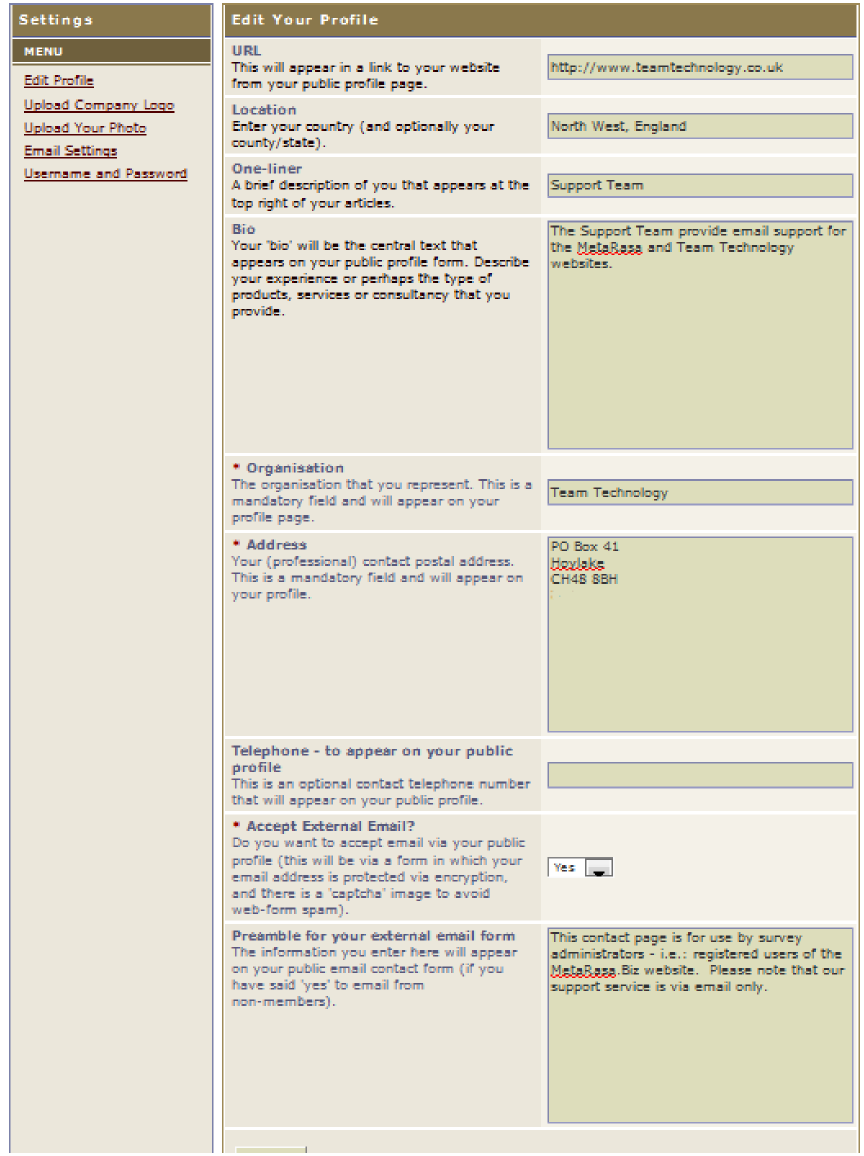
Updating your Public Profile

The first option ("Edit Profile") enables you to change the information that appears on your public profile.

You will have provided most of the information at the time of registration. However, on this page there are additional fields, including:

- a one-liner to describe yourself (e.g.: "career consultant"),
- a summary of your location that will appear under your address, and
- a bio.

Once you have pressed update, you can check how your changes will appear by clicking on "Profile" in the menus at the top of each page.



You can upload a company logo, which appears on the left of your Public Profile.

The first step is to prepare your logo for uploading. Please note that, to avoid pages taking an excessive time to load on slow connections, there is a maximum image size of 160x160 pixels and 50kb total file size. You can reduce your logo file size using the “resize” and/or “crop” facilities in software such as Microsoft Picture Editor or Microsoft Paint.

Once your logo is ready, click on “Browse”, select the logo file, and then press “Upload Company Logo”.

You follow the same process to upload your photo.

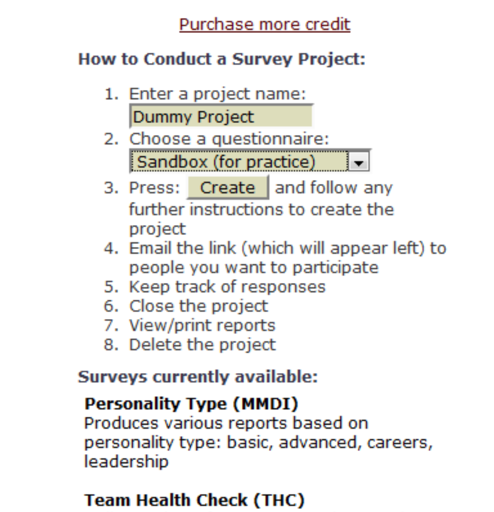
Changing your email address and password

You can change your email settings, password, etc. using the remaining options at the bottom of the Settings menu.

Please note that, on the email settings page, you have an option to accept email from site administrators. We will send emails to you on rare occasions, e.g.: to provide advance notice if we need to take the system down for planned maintenance, or if we add new facilities. If you uncheck this box you will not receive these emails. If you also want to receive more general emails from us – e.g.: advertising relevant training courses – then please register your email address separately in our mailing list using the box on the 'home' page.

When you have changed all your settings, the next page to visit is your survey control panel, where you can use the "Sandbox" to learn how the sytem works. The link to your control panel is in the horizontal menu bar at the top of the page.

Using the Sandbox



Your control panel contains a list of your survey projects, so when you visit it for the first time it will be mostly empty.

The best way to learn about a system that is new to you is to use it, which you can do using the sandbox. The sandbox avoids you wasting any of your credit whilst learning. *You can create sandbox reports at any time. We will delete old sandbox reports during site maintenance, to keep your archive list tidy.*

The steps involved in running a survey project are summarised on the right of the screen. To create a sandbox project, enter a project name in the Step 1 box (e.g.: "Dummy Project"), then select "Sandbox (for Practice)" from the drop down menu in step 2, and then press the "Create" button in step 3.

After pressing “create” you will be presented with a screen that has at least three options.

1 The project name you assigned on the previous screen is also used as the heading that will appear on the questionnaire. You can change the heading/project name on this screen if you wish.

2 The introductory text appears on the first screen of the questionnaire. There is default text for each of the different questionnaires in the system, but you can change the text used in this project here.

3 The final box allows you to set the budget for this project by deciding how many people can complete the questionnaire. This defaults to one person – i.e.: one person can complete the questionnaire – so if you are conducting a team survey, or want to issue the same linke to a number of people for your convenience, then you will need to change this to a larger number.

4 There may be more options on some screens. For example, when creating an MMDI project you can choose which reports your clients are able to view.

Complete the process by pressing the “Create Survey” button. Do not press the button a second time, otherwise you will create two projects and use twice the budget.

When your survey has been created you will be presented with a confirmation screen that also gives you the link to the questionnaire.

In some circumstances, you may wish to create several identical projects. For example. rather than having one MMDI questionnaire link that you give to five people, you may wish to give each of them a unique link.

In that case, when you create the project, allocate the budget for one person only, and use the name of the first person who is completing the questionnaire as the project name. Then, on this screen, you can enter the names of the other people one by one – enter a name, press the “Create Duplicate Project”, enter the next name and so on. When you have finished, you send emails to each of the individuals and include the link to his/her own questionnaire (the links will be listed in your control panel).

This latter method is less convenient for you than sending one link to many people, but it gives you more direct control over your budget and over who completes the questionnaire.

The Control Panel

When you return to your control panel, it will have added the project(s) you created to the list. In this example, as this is the Sandbox you are now using, your credit has not been affected. However, if you had created a real project, your credit would have been reduced by the budget required for the new projects (i.e.: the unit cost x the number of people for each project).

Each project's information is on four lines:

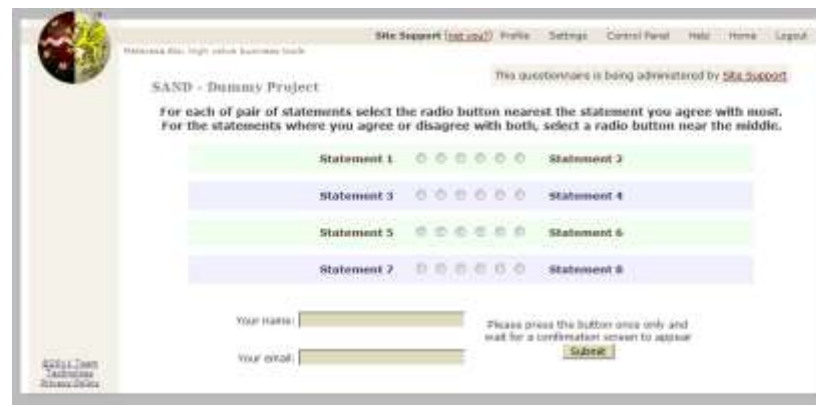
- The first line contains the type of questionnaire (e.g.: SAND , THC, MMDI or TDA), the name of the project. and the date created.
- The second line contains the link to the questionnaire (which you copy and paste into an email to send to your clients for them to complete the questionnaire).
- The third line contains a summary of the project budget: how much you've allocated, how much you've spent, and how much is left (the number in brackets says how many people can still complete the questionnaire given the remaining budget).
- The fourth and final line contains some buttons that enable you to take action on the project – to view the responses, open/close the project, increase the budget and (for closed projects only) produce a project report or archive the project.

Questionnaire Links

The link to the questionnaire contains two parts. The first is the link to the questionnaire, (e.g.: http://www.metarasa.biz/quest/sand/) and the second is the password to your project (e.g.: G3kHhBRDAUagSJQrijuV). It is put into a single link for your client's convenience and to avoid transcription errors. You should therefore tell your clients to treat the link with the same degree of security as a password – and it should under no circumstances be posted on the internet.

When you or the client click on the link, the first screen you see contains the introductory message that was set up when you created the project. When you click on continue, you see the questionnaire.

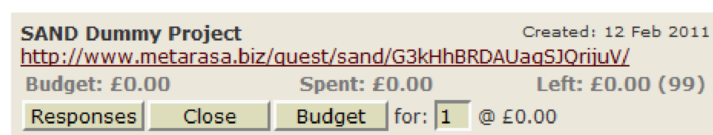
N.B.: the name and email fields are optional, for various reasons - e.g.: TDA and THC reports can often benefit from anonymous responses. If you don't trust your clients to enter their names, then set up one project per client as explained earlier.



When your client submits their responses to the questionnaire, they are presented with a page that confirms their responses have been recorded.   If they go back and press the submit button again the system will not record the details a second time.

The confirmation page also includes, where appropriate, a link to their report (if the questionnaire is the MMDI) or to a page where they can review and update their answers (if the questionnaire is the THC).

You have access to the clients' links via the Project's "Responses" button in your control panel.



User Responses

When you click on the “Responses” button (in the control panel), you are presented with a list of those responses to the project questionnaire that are active (i.e.: that you have not deleted) and a summary at the bottom of the page.

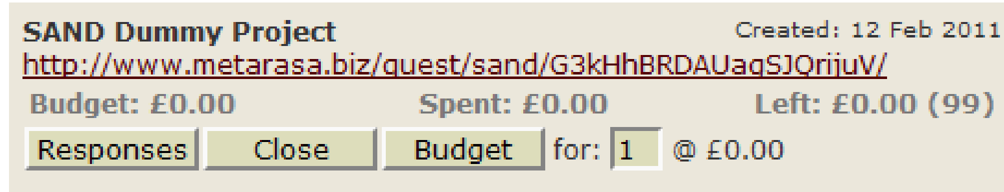
When you click on a respondents name, you are taken to their online report – i.e.: the same link as shown on the page that confirmed their responses had been recorded.

There is also a button to delete a client’s response. Please note that this response still counts against your credit – deleting it makes the individual report inaccessible to the client and/or excludes their details from any project report that is subsequently created.

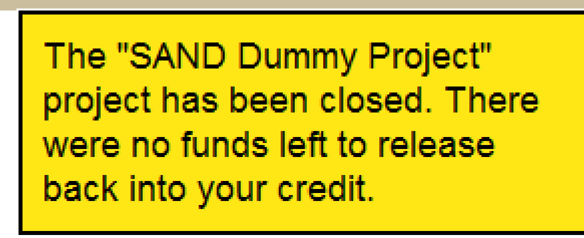
Deleted responses are still listed on this page (distinguished by a dark background) and you can restore them by pressing the “Restore” button.

Controlling your budget

In the control panel there is an option to increase the budget for a project: press the “budget” button to increase the budget for 1 person, or enter a higher number.



If you want to reduce the budget, close the project. This will release any unused budget back into your overall credit (in this particular example, as we are using the Sand box, there are no funds to release back). Then reopen the project , entering the number of people left to complete the questionnaire. This will then allocate the exact budget required to complete the project.



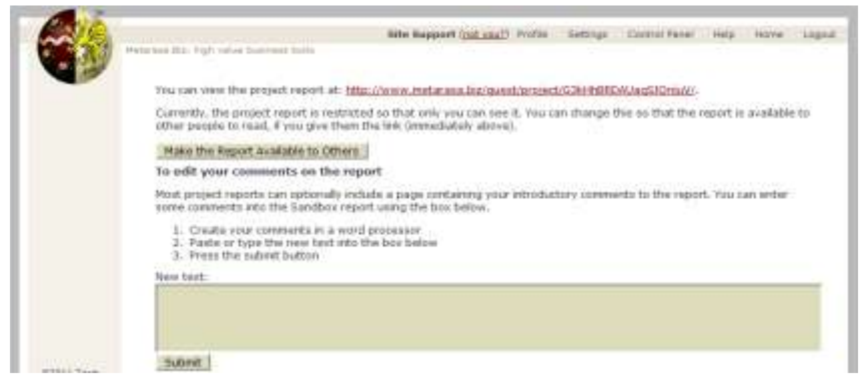
Note from these examples that open projects have a light background and closed projects have a dark background. Also, alert messages appear in black text on a bright yellow background. This is not aesthetically pleasant, rather it is designed to make you notice important messages.

Also, please note that you can only archive a project that is closed, and you can only produce a report for a project that is closed. This is to avoid simple mistakes by making sure you go through the process in the correct order: create a project, monitor the responses, close it, produce a project report (if appropriate) and then archive it.

Producing a project (team) report

The first time you click on the "Report" button you will be shown the cost of the overall project report (usually £14.95). Once you have produced a report you will no longer be able to reopen the project.

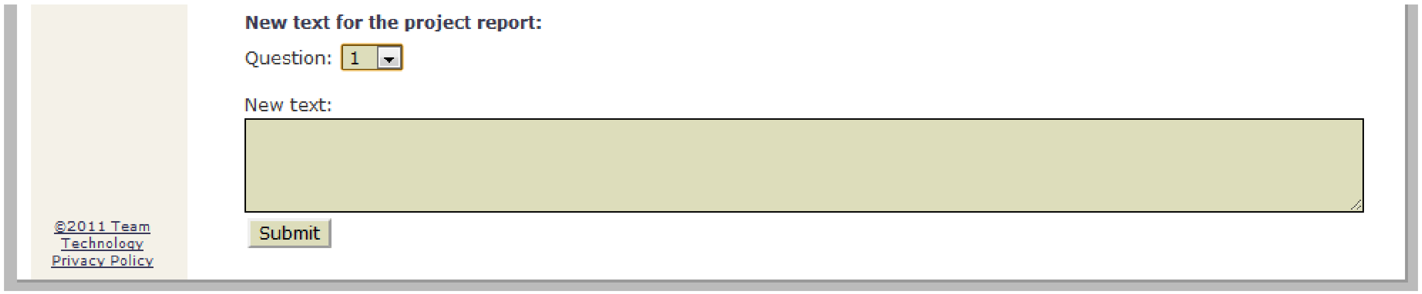
When the report has been created, you will be presented with a link to it. This page will also give you two further options.



The first option is to make the report available to others to read. Initially, only you can read the project report when you are logged in. This is so that you can make some changes (e.g.: to an introductory section). If anyone else tries to access the link they will receive a message saying the report is not available. If you want other people to read the report, click on "Make the Report Available to Others".

The second option is different for different questionnaires For the TDA report is to add some comments by way of introduction. You can simply type text which will appear on a comments page or, if you are familiar with html, you can use basic tags such as <b>, <h> and <i> to format your comments.

For the THC report you have the ability to edit the comments for each question individually. You update the comments one question at a time, by selecting the question number and entering the text to replace the existing comments:



It is important to review these comments and, where appropriate, make changes for the THC. Initially, when the Team Health Check report is produced, it includes all the comments made by each person responding to the questionnaire. To publish all the comments unedited may create problems in the team rather than solve them. At best, they may create misunderstanding if people don't understand the context from which the comments are made; at worst, they may give rise to potential legal action against you and/or someone who completed the questionnaire (e.g.: for libel).

In view of this, before making the report accessible to others, you should edit the comments and replace them with a summary of themes. In particular, you should ensure there is no content that (a) can be attributed to individuals or (b) discusses individuals. If you have any doubt about the best practice in this area, please contact us for details of the training courses in the administration of Team Health Checks that are run by our associate companies.

Archiving

You can only archive a project once it has been closed. When you click on a project's "archive" button, you will be asked to confirm that you wish to archive it:

Archiving a project has the following effects:

- The project no longer appears in your control panel
- The project report is no longer accessible.
- All individual submissions are archived, which means that individual reports are no longer accessible.

You can **restore** a project from your credit history screen – which you can find by clicking on *purchase more credit* in the control panel, then *view your credit history* , and then the *Restore* button for the project you want to restore. NB: This does not restore all the individual submissions for the project, only the project report.   After restoring a project, you can restore individual submissions on the project's *responses* page.

Purchasing Credit

Registered users of the MetaRasa.Biz website are able to use the questionnaires at a discounted rate, compared to the price paid by individuals for the same reports when they are available at the Team Technology website. Projects are accounted for in your control panel at the normal rate - you are given the discount at the time of purchasing the credit. For exampe, suppose you want to administer 30 MMDIs and give your client access to all four reports - which would normally cost £7.30 each. If you purchase £250 pounds of credit, you get a 30% discount. Although the control panel will report that the project budget is £219, the actual cost of that credit to you will have been £153.30.

There is a £50 minimum for any purchase transaction, and the level of discount increases the larger the purchase. Transactions are handled securely and independently by Paypal, and the credit is in most cases available in your MetaRasa.Biz account immediately after purchase (with the exception of delayed payment methods, such as echeque).

To purchase credit, click on the *purchase more credit* link – you can find it just underneath your Credit total in your control panel. Then select the amount you wish to purchase, and click the next button.

You will then see a summary of your purchase. If you wish to proceed, click on the *Checkout* button and you will be taken to the Paypal website, where you can pay using a variety of methods.

When the Paypal transaction has been completed, they will send you a receipt by email. You can then return to your control panel and your credit will automatically be added to your MetaRasa.Biz account.

If none of Paypal's methods seem suitable for you – e.g.: because you do not have a company credit card - then we suggest three alternatives:

- If allowable under your company's expenses system, purchase your credit using a personal credit card and then claim the money back using the Paypal receipt. This is the quickest option.
- Create a Company Paypal Account, and transfer money into that account using, for example, a company cheque.
- Contact Site Support and provide us with a purchase order or details for an invoice (purchase order number, name, company name, address, amount of credit you wish to purchase, username and member code from your purchase credit screen). We will then raise an invoice and credit your account once we have received payment. Please note that there is a minimum purchase of £500 worth of credit for such manual invoices/payments. This is also the slowest option.