



Q-global™



Pearson

Clinical Assessment

Q-global™ User Guide

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Setting up and Administering Assessments

Before you get started we recommend setting up your new Users and/or Examiner(s). So you need to identify who in your organisation is going to administer tests, manage your account and determine if examiners should be set up as users' which will give them a unique login ID and access to your account.

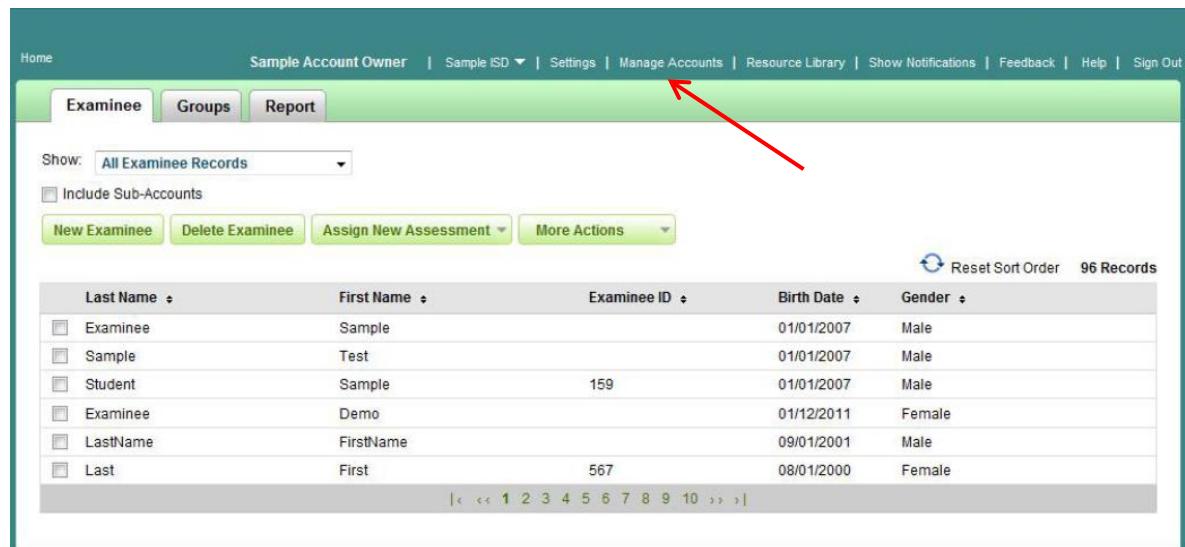
Enter New User

Users can have varying access to the Q-global platform based on the user role, which allows them to set up candidates, view results, run reports and administer assessments. Once you have identified your users we recommend creating a list with roles before setting them up in Q-global.

Example:

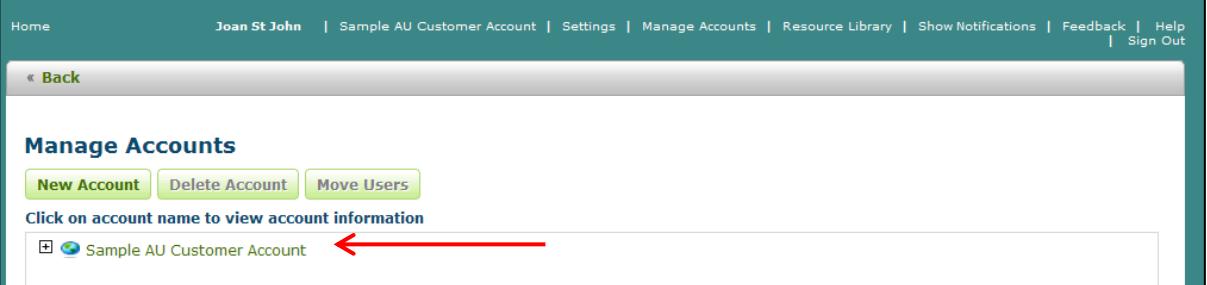
Name:	User Role:
Mary Smith	Account Administrator / Examiner
Sue Brown	Data Entry Operator

The first page you see once you log in to the system is the Examinee List. To add new users **click** on the 'Manage Accounts' link at the top of the page.



The screenshot shows the Q-global platform's Examinee List interface. At the top, there is a navigation bar with links for Home, Sample Account Owner, Sample ISO, Settings, Manage Accounts (which is highlighted in blue and has a red arrow pointing to it), Resource Library, Show Notifications, Feedback, Help, and Sign Out. Below the navigation bar is a green header bar with tabs for Examinee, Groups, and Report. The main content area is titled 'Examinee' and shows a table of examinee records. The table has columns for Last Name, First Name, Examinee ID, Birth Date, and Gender. The records listed are: Examinee (Sample, 01/01/2007, Male), Sample (Test, 01/01/2007, Male), Student (Sample, 159, 01/01/2007, Male), Examinee (Demo, 01/12/2011, Female), LastName (FirstName, 09/01/2001, Male), and Last (First, 567, 08/01/2000, Female). At the bottom of the table, there are navigation arrows for page numbers 1 through 10. The bottom of the page includes a footer with Pearson branding, a copyright notice (Copyright © 2011 NCS Pearson, Inc. All rights reserved.), and a build version (Build Version 2.0.0-SNAPSHOT-257).

Click on the account name



Home Joan St John | Sample AU Customer Account | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

« Back

Manage Accounts

New Account Delete Account Move Users

Click on account name to view account information

[+] Sample AU Customer Account

Click on 'Users'



Home Joan St John | Sample AU Customer Account | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

<< Back || Manage Accounts >> Account Details

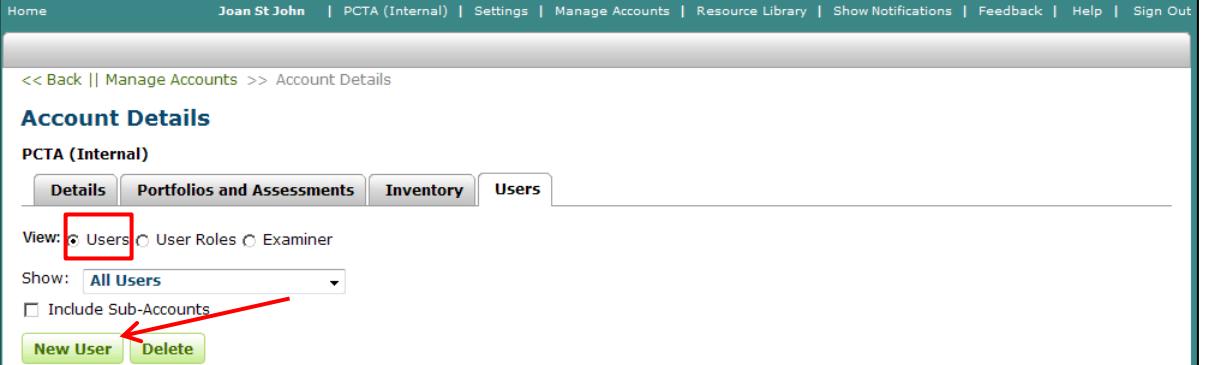
Account Details

Sample AU Customer Account

Details Portfolios and Assessments Inventory Users

Edit

Select 'Users' then click the 'New User' button



Home Joan St John | PCTA (Internal) | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

<< Back || Manage Accounts >> Account Details

Account Details

PCTA (Internal)

Details Portfolios and Assessments Inventory Users

View: Users User Roles Examiner

Show: All Users

Include Sub-Accounts

New User Delete

The 'Create Account User' box will appear. **Enter** the User information; **click** on the 'Examiner' (Clicking 'Examiner' will add the user to the examiner list), **Select** 'Role' and/or create a new role then **click** 'Save'.

Create Account User

Save **Cancel**

Required

Title:

* First Name:

Middle Name:

* Last Name:

Suffix:

* Email:

* Phone Number:

Status:

* Business Unit: **Australia**

* Account: **PCTA (Internal)**

Username:

* Qualification Level:

Examiner: ←

* Role: ←

Enter New Examiner

The system allows you to add names of the examiners that will not have access to the system. Adding the non-user examiner to the system will add his/her name to the Examiner list on the Assessment page and the Default Examiner list on the Settings page

To add a new Examiner follow the above steps except **select** 'Examiner' then **click** the 'New Examiner' button.

Home Joan St John | Sample AU Customer Account | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

<< Back || Manage Accounts >> Account Details

Account Details

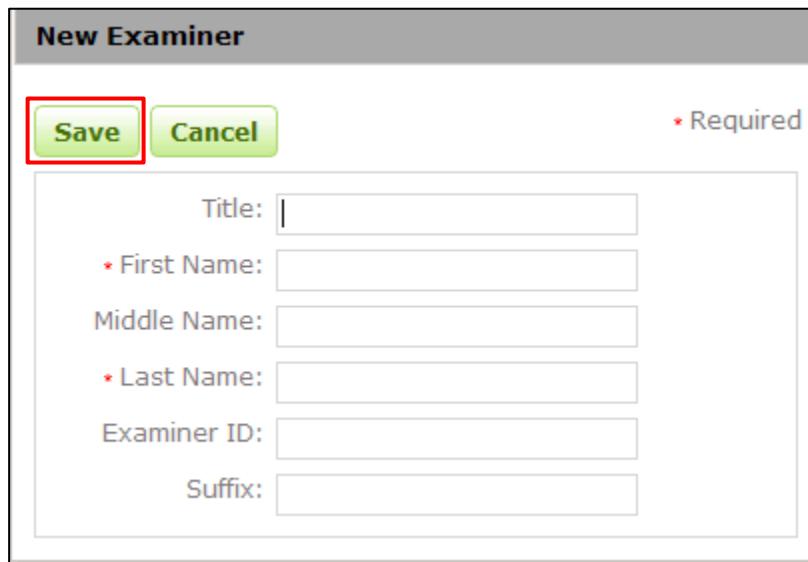
Sample AU Customer Account

Details **Portfolios and Assessments** **Inventory** **Users**

View: Users User Roles Examiner ←

New Examiner **Delete**

The 'New Examiner' box will appear. **Enter** the Examiner information and **click** the 'Save' button.



The screenshot shows a 'New Examiner' form with the following fields:

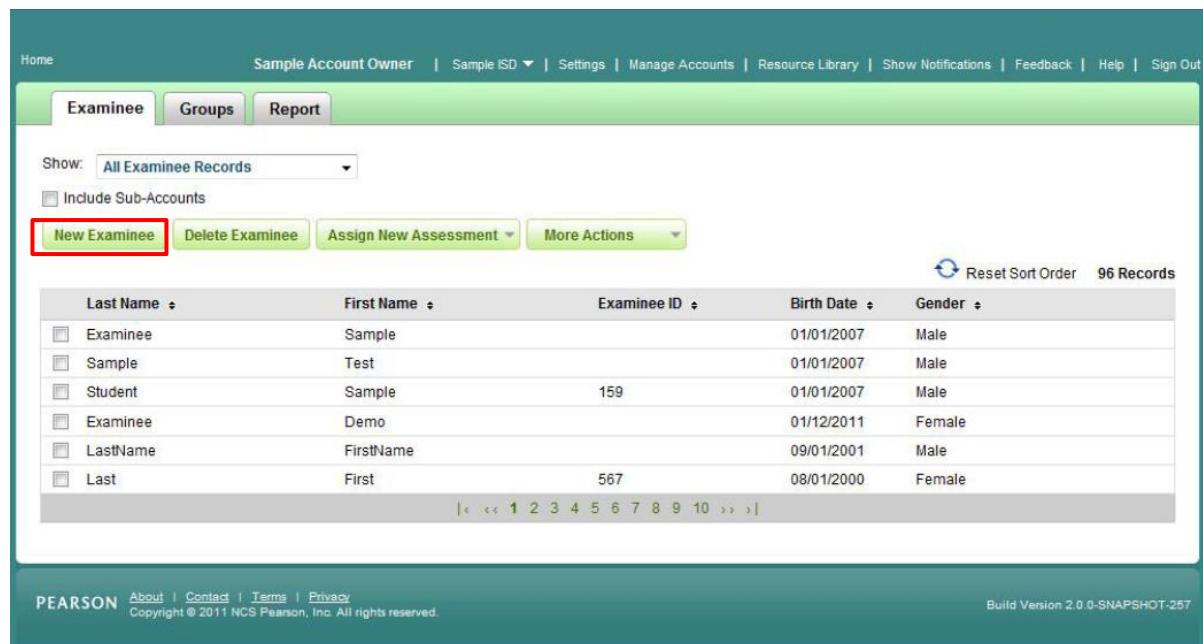
- Title: [empty input field]
- * First Name: [empty input field]
- Middle Name: [empty input field]
- * Last Name: [empty input field]
- Examiner ID: [empty input field]
- Suffix: [empty input field]

At the top right, there is a red asterisk followed by 'Required'. At the top left are 'Save' and 'Cancel' buttons, with 'Save' being highlighted by a red box.

Setting up a New Examinee

Now that you have set up your examiners let's add your examinee's.

The first page you see once you log in to the system is the Examinee List. To add new examinees **click** on the 'New Examinee' tab.



The screenshot shows the 'Examinee' tab selected in the navigation bar. The page displays a list of examinees with the following columns:

Last Name	First Name	Examinee ID	Birth Date	Gender
Examinee	Sample		01/01/2007	Male
Sample	Test		01/01/2007	Male
Student	Sample	159	01/01/2007	Male
Examinee	Demo		01/12/2011	Female
LastName	FirstName		09/01/2001	Male
Last	First	567	08/01/2000	Female

At the top, there are buttons for 'New Examinee' (highlighted with a red box), 'Delete Examinee', 'Assign New Assessment', and 'More Actions'. At the bottom, there is a 'Reset Sort Order' button and a page number indicator (1 of 10).

The 'New Examinee' box will appear. **Enter** the examinee information and **click** the 'Save' button. The new examinee will appear in your list of examinee's on the front page.

« Back

New Examinee

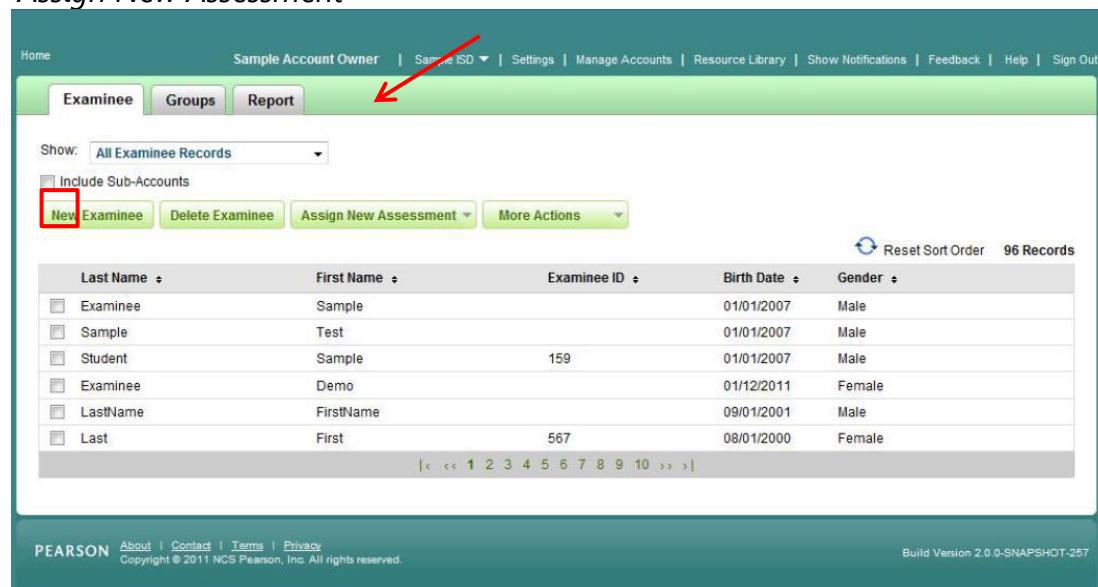
Save **Cancel** * Required

First Name:	<input type="text"/>	Account: Sample AU Customer Account
Middle Name:	<input type="text"/>	Custom Field 1: <input type="text"/>
Last Name:	<input type="text"/>	Custom Field 2: <input type="text"/>
Examinee ID:	<input type="text"/>	Custom Field 3: <input type="text"/>
Gender:	<input type="text" value="Please Select..."/>	Custom Field 4: <input type="text"/>
Birth Date:	<input type="text" value="DD/MM/YYYY"/>	Age: 0 years 0 months
Email:	<input type="text"/>	
Comment:	<input style="height: 40px;" type="text"/>	
500 Characters remaining.		

Note: You can also upload Examinee's in a group. For information please refer to the User Guide. Which can be found by clicking on the 'Resource Library' from the menu option at the top of the Q-global screen, select Resources > About Q-global > Q-global_User_Guide.pdf

Assigning an Assessment

To assign an assessment to an examinee **click** in the box next to the examinee name then **click** 'Assign New Assessment'



Home Sample Account Owner | Sample ISO ▾ | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

Examinee Groups Report

Show: All Examinee Records

Include Sub-Accounts

New Examinee Delete Examinee Assign New Assessment More Actions

Last Name	First Name	Examinee ID	Birth Date	Gender
Examinee	Sample		01/01/2007	Male
Sample	Test		01/01/2007	Male
Student	Sample	159	01/01/2007	Male
Examinee	Demo		01/12/2011	Female
LastName	FirstName		09/01/2001	Male
Last	First	567	08/01/2000	Female

Reset Sort Order 96 Records

1 2 3 4 5 6 7 8 9 10 >> >

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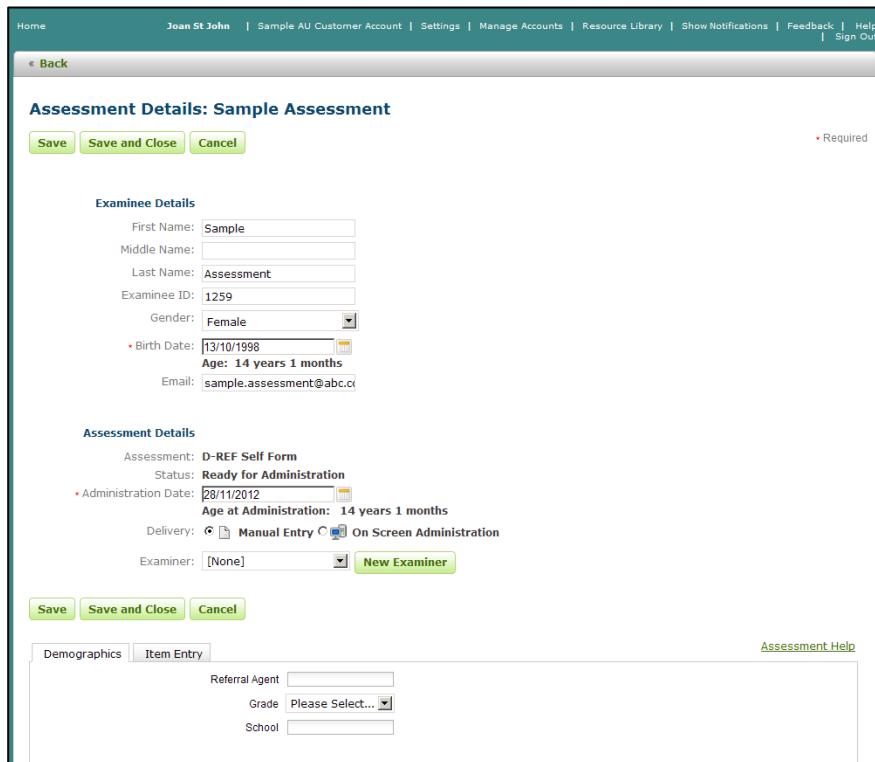
Build Version 2.0.0-SNAPSHOT-257

From the list of available assessments **Click** the assessment you want to assign



The screenshot shows a software interface for assigning new assessments. At the top, there are four buttons: 'Assign New Assessment', 'More Actions', 'Move To', and 'Search'. Below these is a list box titled 'Assessments' containing the following items: AWMA-2, D-REF Parent Form, D-REF Self Form (with a red arrow pointing to it), D-REF Teacher Form, DIAL-4, Speed Dial-4, WRMT-III Form A, and WRMT-III Form B.

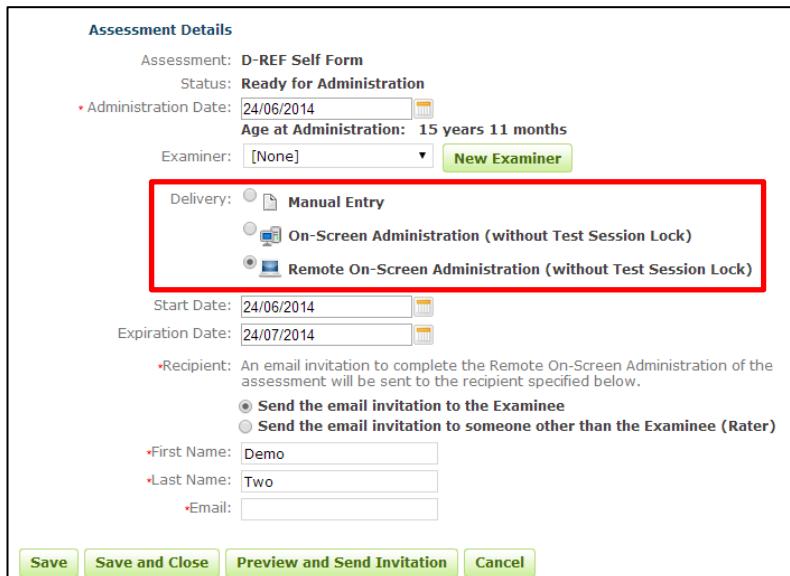
The 'Assessment Details' screen will appear showing the *Examinee* and *Assessment* details.



The screenshot shows the 'Assessment Details' screen for a sample assessment. At the top, there are buttons for 'Save', 'Save and Close', and 'Cancel'. The 'Required' field is marked with a red asterisk. The 'Examinee Details' section contains fields for First Name (Sample), Middle Name, Last Name (Assessment), Examinee ID (1259), Gender (Female), Birth Date (13/10/1998), Age (14 years 1 months), and Email (sample.assessment@abc.ci). The 'Assessment Details' section shows the Assessment is 'D-REF Self Form', Status is 'Ready for Administration', Administration Date is '20/11/2012', Age at Administration is '14 years 1 months', Delivery is 'Manual Entry', and Examiner is '[None]'. At the bottom, there are buttons for 'Save', 'Save and Close', and 'Cancel', and a link to 'Assessment Help'.

From the 'Assessment Details' section you have the following delivery type options:

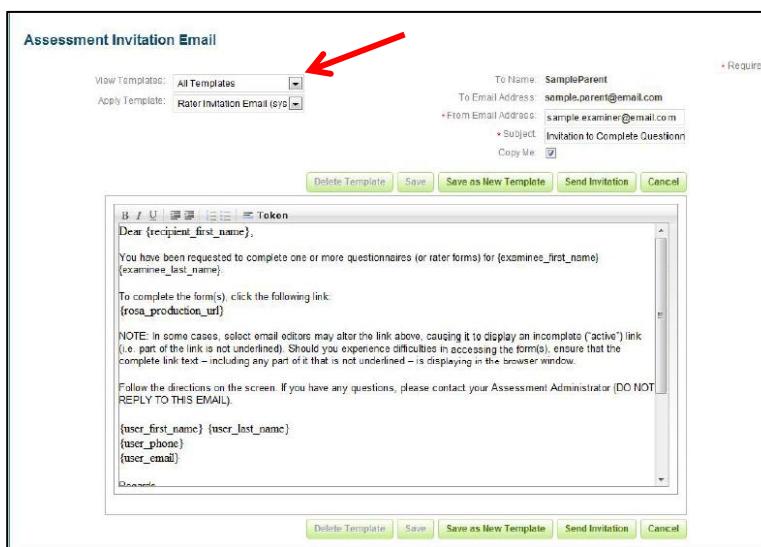
- Manual Entry
- On-Screen Administration
- Remote On-Screen Administration



The screenshot shows the 'Assessment Details' page for a 'D-REF Self Form'. The 'Status' is 'Ready for Administration'. The 'Administration Date' is set to 24/06/2014, resulting in an 'Age at Administration' of '15 years 11 months'. The 'Examiner' dropdown is set to '[None]' with a 'New Examiner' button. The 'Delivery' section contains three options: 'Manual Entry' (radio button), 'On-Screen Administration (without Test Session Lock)' (radio button), and 'Remote On-Screen Administration (without Test Session Lock)' (radio button, which is selected and highlighted with a red box). Below these are 'Start Date' (24/06/2014) and 'Expiration Date' (24/07/2014). The 'Recipient' section includes a note that an email invitation will be sent to the recipient specified below, with radio buttons for 'Send the email invitation to the Examinee' (selected) and 'Send the email invitation to someone other than the Examinee (Rater)'. Below this are fields for 'First Name' (Demo), 'Last Name' (Two), and 'Email'. At the bottom are 'Save', 'Save and Close', 'Preview and Send Invitation' (highlighted in green), and 'Cancel' buttons.

If delivery option 'Remote On-Screen Administration' is selected **enter** the 'Recipient' information then **Click** 'Preview and Send Invitation'

The Invitation email page will open after selecting *Preview and Send Invitation* button. From the 'View Template' drop-down, **select** the appropriate invitation e-mail template.



The screenshot shows the 'Assessment Invitation Email' page. At the top, there are two dropdown menus: 'View Template' (set to 'All Templates') and 'Apply Template' (set to 'RateInvitation Email (sys)'). A red arrow points to the 'View Template' dropdown. To the right, there are fields for 'To Name' (SampleParent), 'To Email Address' (sample.parent@email.com), 'From Email Address' (sample.examiner@email.com), 'Subject' (Invitation to Complete Questionn), and a 'Copy Me' checkbox. Below these are buttons for 'Delete Template', 'Save', 'Save as New Template', 'Send Invitation', and 'Cancel'. The main area is a rich text editor window containing an invitation message. The message starts with 'Dear {recipient_first_name}', followed by a note about completing questionnaires for the examinee, instructions to click a link, and a note about incomplete links. It also includes a 'NOTE' about email editors. At the bottom of the editor are buttons for 'Delete Template', 'Save', 'Save as New Template', 'Send Invitation', and 'Cancel'.

You can modify the template or click the 'Send Invitation' button to email the URL link to the On Screen Administrator.

Generating Reports

There are two options for generating reports.

1. The *Examinee* tab – allows the administrator to select the individual examinee and then generate the report
2. The *Report* tab – allows the administrator to search on individuals and or groups before generating reports. (please only use the Examinee tab way to generate a report at this time)

Examinee Tab

From the *Home* screen select the *Examinee* Tab.

Select the Examinee by double clicking on their name.

	Last Name	First Name	Examinee ID	Birth Date	Gender
1	Mason	Mimma	1234	10/07/1995	Female
2	St John	Joan	8765	24/09/1996	Female
3	Assessment	Sample	1259	13/10/1998	Female
4	Peros	Yvonne	1235	12/06/1995	Female
5	Lukas	Nick	NL1234	11/04/1968	Male
6	O'Keefe	Valorie	9875	04/08/1997	Female
7	Mooney	Sabrina	6543	30/09/1996	Female
8	Deery	Ben	9876	07/08/1995	Male
9	Brown	Fiona	9874	12/08/1996	Female

This will open the Examinee profile screen where you can:

- view and edit the examinee demographics
- assign a new assessment
- un-assign an assessment
- delete an assessment
- generate a report
- view assessment / examinee status / administration date etc

The screenshot shows the 'Examinee: Joan St John' details. The 'Demographics' section is highlighted with a red box. It contains the following information:

- System ID: 9532
- First Name: Joan
- Last Name: St John
- Birth Date: 24/09/1996
- Examinee ID: 8765
- Gender: Female
- Email: joan.stjohn@pearson.com.au
- Comment:

On the right, account details are listed:

- Account: Sample AU Customer Account
- Custom Field 1:
- Custom Field 2:
- Custom Field 3:
- Custom Field 4:
- Groups:
- Legacy ID:

Below the demographics, there are buttons: 'Assign New Assessment', 'Unassign Assessment(s)', 'Delete Assessment(s)', and 'Generate Report'. A red arrow points from the text in the previous step to the 'Generate Report' button. The assessment list table shows two records:

Select the assessment that you want to generate a report for by clicking on the box next to the assessment name, then select Generate Report.

The *Generate Report* screen will display the assessment that is ready for reporting.

The screenshot shows the 'Generate Report' screen. A red arrow points to the 'D-REF Individual Score Report' link.

Double click on the report you would like to generate.

The Report Configuration screen will display.

The screenshot shows the 'Report Configuration' screen. It displays the following information:

- Examinee: Deery, Ben
- Examinee ID: 9876
- Assessment: D-REF Self Form
- Status: Ready for Reporting
- Report: D-REF Individual Score
- Format: Adobe (pdf)
- Records Selected: 1
- Inventory Needed: 1 usage(s)
- Available Inventory: 24 usage(s) [Buy Now](#)

Below the main configuration, there are 'Include' and 'Settings' tabs. Under 'Settings', the following checkboxes are checked:

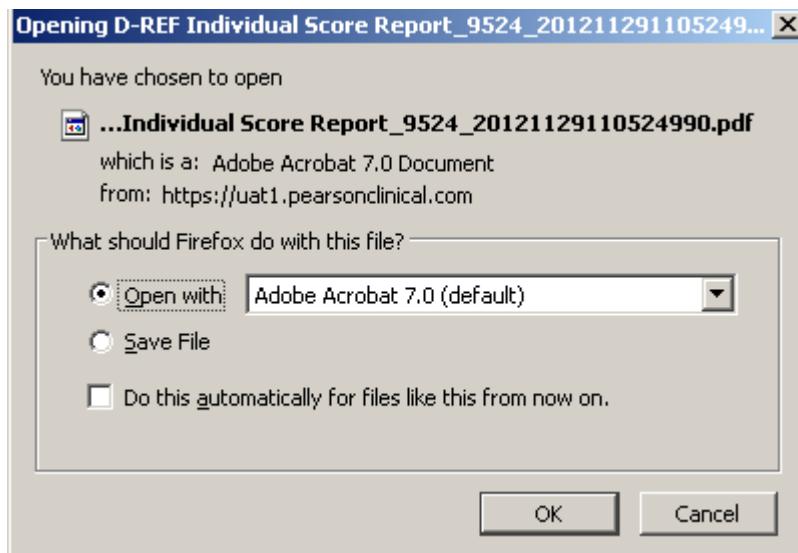
- Use Respondent Name
- Print Item Responses

This screen displays:

- Examinee information
- Assessment

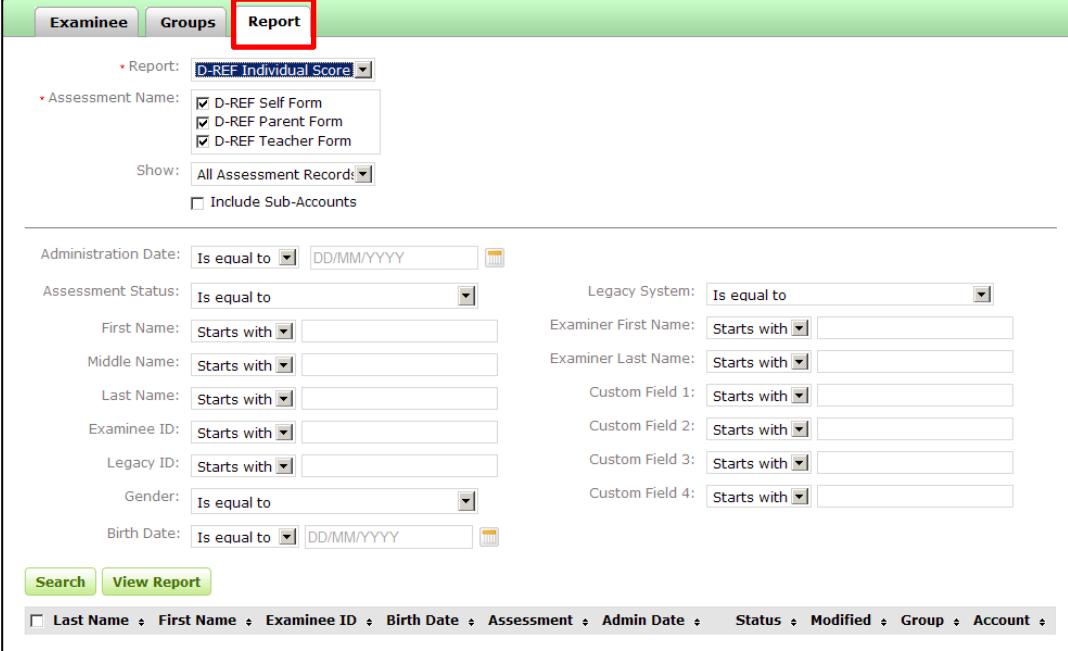
- Status
- Report - update and change from the drop down menu
- Format - note only PDF format available. This will be available in Word in future releases
- Inventory Needed – number of usage(s) required to generate the report
- Available Inventory – how many usage(s) available in your inventory
- Include – option to Use Respondent Name and print item responses
- Settings – **Select** Norm Group / Significance Level for Confidence Intervals / Significance level for Index Discrepancies
- Update options as required then **select** Generate Report (top left).

A pop up window will display as follows allowing you to select to open the file or save the file to a nominated location.



The Reports Tab

This option allows you to generate reports for individuals and/or groups.



Examinee Groups Report

Report: D-REF Individual Score

Assessment Name: D-REF Self Form D-REF Parent Form D-REF Teacher Form

Show: All Assessment Record Include Sub-Accounts

Administration Date: Is equal to DD/MM/YYYY

Assessment Status: Is equal to

Legacy System: Is equal to

First Name: Starts with

Examiner First Name: Starts with

Middle Name: Starts with

Examiner Last Name: Starts with

Last Name: Starts with

Custom Field 1: Starts with

Examinee ID: Starts with

Custom Field 2: Starts with

Legacy ID: Starts with

Custom Field 3: Starts with

Gender: Is equal to

Custom Field 4: Starts with

Birth Date: Is equal to DD/MM/YYYY

Last Name First Name Examinee ID Birth Date Assessment Admin Date Status Modified Group Account

Examinee Report

To generate a report for an Examinee:

1. **Click** the *Report* tab.
2. **Select** a *Report* to generate.
3. **Select** a value from the *Show* field to choose all assessment records or only those records associated with a group assignment.
4. **Click** the check box to *Include Sub-Accounts* (if applicable) if you want to search for all examinee assessments you have privileges to see. (Optional)
5. **Complete** fields for any criteria you want used in the search. (Optional)
6. **Click** the *Search* button. (*Details on the search results table are listed described below.*)
7. **Click** the check box next to the assessment record you would like to generate a report for.
8. **Click** the *View Report* button.
9. This will open the *Report Configuration* page.

Report Configuration

Generate Report Cancel

Examinee: **Last Name, First Name**
Examinee ID: **9875**
Assessment: **Self**
Report: **D-REF Individual Score Report**
Format: **Adobe (pdf)**

Records Selected: **1**
Inventory Needed: **0 usage(s)**
Available Inventory: **24 usage(s)** [Buy Now](#)

[Assessment Help](#)

Include **Settings**

Select Norm Group Age Adjusted Age and Gender Adjusted

Significance Level for Confidence Intervals 95% 90%

Significance Level for Index Discrepancies .05 .15

The Report Configuration page is separated into two sections. The top section displays information about the examinee, the assessment selected, and the report.

The bottom section is where you select the information you would like included in the report. For details related to the tabs and fields displayed in this section refer to the Assessment Help specific to the report you are interested in or navigate to a product specific page and click the Assessment Help link (e.g. click Assessment Help from the D-Ref Configuration page).

10. When all of your selections have been made, **click** the *Generate Report* button.

Group Report

To generate a Group Report:

1. From the *Report* tab.
 2. **Select** a group *Report* to generate.
 3. **Select** a value from the *Show* field to choose all assessment records or only those records associated with a group assignment.
 4. **Click** the check box to *Include Sub-Accounts* (if applicable) if you want to search for all examinee assessments you have privileges to see. (Optional)
 5. **Complete** fields for any criteria you want used in the search. (Optional)
 6. **Click** the *Search* button.
 7. **Click** the check box next to the assessment records you would like to include in your report.
- NOTE:** You can select all records by clicking the check box in the header of the table.

8. **Click** the View Report button.
9. This will open the *Report Configuration* page.

Report Configuration

Generate Report Cancel

Examinee: **Last Name, First Name**
Examinee ID: **9875**
Assessment: **Self**
Report: **D-REF Individual Score Report**
Format: **Adobe (pdf)**
Records Selected: **1**
Inventory Needed: **0 usage(s)**
Available Inventory: **24 usage(s)** [Buy Now](#)

Include [Settings](#) [Assessment Help](#)

Select Norm Group Age Adjusted Age and Gender Adjusted
Significance Level for Confidence Intervals 95% 90%
Significance Level for Index Discrepancies .05 .15

For details related to the tabs and fields displayed in this section refer to the Assessment Help specific to the report you are interested in or navigate to a product specific page and click the Assessment Help link (e.g. click Assessment Help from the D-Ref™ Report Configuration page).

10. When all of your selections have been made, click the Generate Report button.

Rules

- If you select more than one examinee to run the same report on (batch report), the following information on the top of the window will not be shown, Examinee, Examinee ID, Assessment, and Report.
- If you select more than one assessment for the same examinee (multi-rater reports), a validation will occur on the selected assessments allowing or disallowing the Generate Report button.
- Only assessments with a status of 'Ready for Reporting' or 'Report Generated' can be used in a report.
- Assessment records without a valid reporting status will be returned with the search results; however, you cannot select them for report generation.

- Assessments with a status of 'Ready for Reporting' require a report-specific usage or subscription in your inventory. If you do not have usages or an active subscription available, you can click the **Buy Now** link to purchase more.

Further Support

If you need further assistance please contact our client services team at sgcs.crq@pearson.com or +65 6319 9333.