CONFIGURE

TALENT DECODED

User Manual

HOGAN

Table of Contents

Part I

The Science Behind It

Introduction

Global markets require organizations to simultaneously work within different locations, legal environments, and cultures. Therefore, organizations often use competency models to align many of their Human Resource Management applications. Companies can link individual characteristics to competencies that represent critical job components. Then they can use this information to select individuals with these characteristics and guide development and training efforts (Schippmann et al., 2000).

Developing a competency model requires three steps. First, clear competency definitions are necessary to ensure understanding across locations. Second, validation techniques should be used to link the competencies to performance. Finally, data from an incumbent sample should be used to support the linkages between the competencies and job performance.

This chapter describes the research behind Hogan's job family structure and Hogan's competency model, and how Configure combines the two to provide companies with the ability to compare and contrast candidate scores on critical competencies for any given job family or job type. We begin by describing the development of Hogan's job family structure.

Hogan Job Families

Job families are groups of occupations classified as similar based on work performed, skills, education, training, and other credentials required for competence. Hogan initially derived seven job families (Managers & Executives, Professionals, Technicians & Specialists, Operations & Trades, Sales & Customer Support, Administrative & Clerical, and Service & Support) from nine job classifications used by the Equal Employment Opportunity Commission (EEOC) for employers in the United States (Equal Employment Opportunity Commission, 1978). Hogan chose this structure because the EEOC job classifications are: (a) used by a large percentage of employers within the United States; and (b) conceptually clear and easy to use for reporting purposes. Using this job family structure, Hogan compiles job analysis data from thousands of jobs into the JET archive, which allows for a range of job- and job family-level analyses for clients.

However, for Configure, Hogan made two important changes to the seven job family structure to better differentiate jobs within two families. Specifically, the Managers & Executives job family was separated into the Executives job family and the Managers job family, largely because the work activities and the personal characteristics required for success in executive versus middle management jobs differ. Our archival research indicates that individuals in executive roles are expected to articulate a vision and define organizational strategy, whereas managers deal with the day-to-day tactical operations involved with executing that strategy. Similarly, we separated the Sales & Customer Support job family into the Sales job family and the Customer Support job family because the personal characteristics and work activities involved with persuasion and meeting sales objectives are different from those focused on resolving problems and tactfully handling complaints. When examining archival studies, we typically find that sales roles require more ambition and social interaction, whereas customer support jobs require incumbents to be more tactful and responsible. With these modifications, we present the Configure job families and their definitions in Table 1.

Table 1 Hogan Job Families

Job Family	Definition
Executives	Employees at top levels of administrative and managerial authority over all resources of the organization. Persons in these occupations are responsible for establishing broad policies, strategic planning, forecasting, and directing work of the organization as a whole.
Managers	Employees responsible for either entry-level supervision or middle management functions within an organization. Individuals in these occupations are responsible for prioritizing work tasks, allocating resources, and directing the day-to-day activities of individual employees and work teams.
Professionals	Employees with no managerial authority, but high status within the organization because of the knowledge and/or skills they possess. From entry-level to senior professionals, these employees are experts in their field and usually have a high level of education.
Technicians & Specialists	Employees with a combination of specialized knowledge and manual skills required to perform specific, vital functions within an organization. These occupations usually require at least 2 years of college, technical or vocational school, or thorough on-the-job training.
Operations & Trades	Skilled craft workers, semi-skilled operatives, and non-skilled laborers whose job knowledge and skills are primarily gained through on-the-job training and experience. These individuals often perform manual labor, and little prerequisite knowledge and/or skill is required in these occupations.
Sales	Employees responsible for interacting with clients and selling products and/or services to meet their needs. These occupations may require making sales presentations, managing accounts, building relationships, ensuring continued sales with existing customers, and closing new sales to meet goals.
Customer Support	Employees responsible for providing courteous and helpful service to maintain relationships with clients. Individuals in these positions often handle inbound or outbound customer contact to take orders, handle service problems, answer questions, and resolve complaints.
Administrative & Clerical	Employees who direct or coordinate supportive services of an organization. These employees engage in a variety of routine activities such as keeping records, distributing mail, processing information, handling telephone calls, preparing correspondence, and scheduling meetings.
Service & Support	Employees who perform protective (e.g., police, fire fighter) or non-protective (e.g., recreation and amusement, professional and personal service) services for others. These occupations are concerned with areas such as healthcare support, food preparation, personal care, or social services.

The next section reviews Hogan's process for collecting data on the critical work behaviors for each job family.

Hogan's Job Evaluation Tool

To identify critical work behaviors for jobs across the globe, Hogan collects data using the Job Evaluation Tool (JET). The JET represents one of the most extensively researched, reliable, and valid worker-oriented job analysis tools available (Foster, Gaddis, & Hogan, 2012). The JET archive, a repository of JET data, boasts job analysis data from over 18,000 respondents representing thousands of individual jobs, ensuring comprehensive coverage of a wide range of occupations (Hogan Assessment Systems, 2009).

Included in the JET is the Competency Evaluation Tool (CET), which contains items representing the 62 competencies. The CET asks Subject Matter Experts (SMEs) to indicate the degree to which each of the listed competencies relates to successful performance in the job or job family under study. SMEs are typically high performing incumbents or supervisors who provide a representative sample of occupational and demographic strata. SME ratings provide a basis for structural models used to examine comparability of job domains and their competencies across jobs (J. Hogan, Davies, & R. Hogan, 2007).

Raters evaluate each competency using a five-point scale ranging from "0" (Not associated with job performance) to "4" (Critical to job performance). Critical competencies must receive an average score of at least "3" (Important to performance). These ratings serve a number of purposes, such as identifying competencies to use in synthetic validation for the Hogan Personality Inventory (HPI) and Hogan Development Survey (HDS), showing similarities across roles in job comparison studies, determining the importance of an organization's existing competency model components, or serving as the foundation for creating a new competency model to represent and drive performance for a job or job family. The following section describes how the CET is derived from the research-based Hogan Competency Model (HCM).

Development of the Hogan Competency Model

To identify relationships between commonly used competencies and personality, we developed the HCM. Hogan designed the HCM to align with other well-known academic and applied competency models, and to provide a foundation for creating algorithms that drive client competency-based reports. The development of the HCM included several steps.

First, we reviewed an original version of the CET with 56 competencies. Hogan identified overlapping competencies by examining competency definitions and correlating ratings obtained on a sample of over 500 jobs. We also flagged competency definitions that (a) included the competency name in the definition, (b) contained multiple concepts, (c) overlapped with other competencies, or (d) were generally unclear.

Next, we reviewed 12 academic, 6 commercial, and 3 government competency models and compared them to the 56 competencies. These competency models were identified by (a) reviewing the literature for publications outlining relevant competency models (e.g. Tett, Guterman, Bleir, & Murphy, 2000), (b) requesting competency models from partner organizations, and (c) contacting companies and competitors with well advertised or commonly used models (e.g. SHL, Bartram, 2005).

Afterward, three Hogan researchers independently mapped the original 56 competencies to each comparison model. We aggregated the results and the raters met to resolve conflicts and reach a final consensus. Based on all available information, we eliminated redundant and added missing competencies, and clarified definitions.

Then, we obtained feedback from non-Industrial/Organizational professionals on the revised list of competencies. Each individual independently mapped each competency and provided recommendations for the content and phrasing of the competency names and definitions.

Finally, four Hogan researchers again independently mapped the revised competency model to each of the 21 comparison models and met to reach a final consensus. The resulting model includes 62 competencies. These competencies are further categorized based on the Domain Model of Organizational Performance (hereafter 'Domain Model'; R. Hogan & Warrenfeltz, 2003).

The Domain Model is used to effectively classify existing competencies into a comprehensive and meaningful performance model (R. Hogan & Warrenfeltz, 2003; Warrenfeltz, 1995), leading to easier interpretations of and comparisons across models and contains four domains:

Intrapersonal Skills – Intrapersonal skills develop early in childhood and have important consequences for career development in adulthood, which include core-self esteem, resiliency, and self-control, and form the foundation on which careers develop.

Interpersonal Skills - Interpersonal skills concern building and sustaining relationships, and can be described in terms of an ability to (a) put oneself in the position of another person, (b) accurately perceive and anticipate other's expectations, and (c) incorporate information about the other person's expectations into subsequent behavior.

Business Skills - Business skills differ from Intrapersonal and Interpersonal skills in that they are (a) the last to develop, (b) the easiest to teach, (c) the most cognitive, and (d) the least dependent upon dealing with other people. Business skills involve comparing, compiling, innovating, computing, analyzing, coordinating, synthesizing, and so on.

Leadership Skills - Leadership skills depend upon successful development of intrapersonal, interpersonal, and technical skills. Leadership skills entail an ability to (a) recruit talented people, (b) retain talent once it has been recruited, (c) motivate subordinates, (d) develop and promote a vision for the team, and (e) involves being persistent and hard to discourage.

Table 2 presents the 62 competencies and their corresponding definitions and domain designation.

Table 2 Hogan Competency Model

Competency Name	Definition	Domain
Accountability	Accepts responsibility for one's actions regardless of outcomes.	Intrapersonal
Anticipating Problems	Forecasts and detects errors, gaps, and potential flaws.	Business
Attracting Talent	Recruits, rewards, and retains individuals with needed skills and abilities.	Leadership
Business Insight	Applies business knowledge to achieve organizational goals and objectives.	Leadership
Caring about People	Displays sensitivity towards the attitudes, feelings, or circumstances of others.	Intrapersonal
Competing with Others	Strives to exceed others' performance.	Intrapersonal
Customer Focus	Provides courteous, timely, and helpful service to encourage client loyalty.	Interpersonal
Dealing with Ambiguity	Comfortably handles unclear or unpredictable situations.	Intrapersonal
Decision Making	Uses sound judgment to make timely and effective decisions.	Leadership
Delegating	Assigns work to others based on tasks, skills, and workloads.	Leadership
Dependability	Performs work in a reliable, consistent, and timely manner.	Intrapersonal
Detail Focus	Performs work with care, accuracy, and attention to detail.	Intrapersonal
Developing People	Provides support, coaching, training, and career direction to others.	Leadership
Displaying Confidence	Projects poise and self-assurance when completing work tasks.	Intrapersonal
Driving Change	Champions new methods, systems, and processes to improve performance.	Leadership
Driving for Results	Accomplishes goals, completes tasks, and achieves results.	Intrapersonal
Driving Innovation	Stimulates creative ideas and perspectives that add value.	Business
Driving Performance	Provides guidance and feedback to maximize performance of individuals and/or groups.	Leadership
Driving Strategy	Directs effort to achieve long-term business objectives.	Leadership
Engagement	Demonstrates loyalty and commitment through enthusiasm and extra effort.	Interpersonal
Financial Insight	Applies financial knowledge to achieve organizational goals and objectives.	Business
Flexibility	Changes direction as appropriate based on new ideas, approaches, and strategies.	Intrapersonal
Handling Stress	Manages pressure without getting upset, moody, or anxious.	Intrapersonal
Industry Insight	Applies knowledge of industry trends and outlooks to achieve organizational goals and objectives.	Business
Influencing Others	Persuades others to help achieve organizational goals and objectives.	Interpersonal
Inspiring Others	Motivates others to accomplish organizational goals.	Leadership
Integrity	Acts honestly in accordance with moral or ethical principles.	Intrapersonal
Leading Others	Demonstrates general leadership ability and effectiveness.	Leadership
Leveraging Diversity	Respects and values individual differences to obtain a desired effect or result.	Interpersonal
Leveraging People Skills	Gets along well with others, is tactful, and behaves appropriately in social situations.	Interpersonal
Leveraging Work Skills	Applies technology and job-relevant abilities to complete work tasks.	Business

Table 2 Hogan Competency Model (continued)

Competency Name	Definition	Domain
Listening to Others	Listens and restates the ideas and opinions of others to improve mutual understanding.	Interpersonal
Managing Conflict	Resolves hostilities and disagreements between others.	Leadership
Managing Resources	Coordinates people and financial and material capital to maximize efficiency and performance.	Leadership
Negotiating	Explores alternatives to reach outcomes acceptable to all parties.	Interpersonal
Networking	Builds and maintains a system of strategic business connections.	Interpersonal
Organizational Citizenship	Exceeds job requirements to help the organization.	Interpersonal
Overcoming Obstacles	Pursues goals and strategies despite discouragement or opposition.	Intrapersonal
Planning and Organizing	Coordinates and directs activities to help achieve business objectives.	Intrapersonal
Political Savvy	Recognizes, interprets, and works within the political environment of an organization.	Business
Positive Attitude	Displays a positive disposition towards work.	Intrapersonal
Presenting to Others	Conveys ideas and information to groups.	Business
Processing Information	Gathers, organizes, and analyzes diverse sources of information.	Business
Professionalism	Acts in accordance with job-related values, principles, and standards.	Intrapersonal
Quality Focus	Strives to meet quality standards and produce quality work products.	Business
Relationship Building	Develops collaborative relationships to facilitate current and future objectives.	Interpersonal
Rule Compliance	Adheres to directions, policies, and/or legal guidelines.	Intrapersonal
Safety Focus	Attends to precautions and proper procedures to guard against work-related accidents and injuries.	Business
Sales Focus	Generates revenue by promoting products and services to others.	Business
Self Development	Actively acquires new knowledge and skills to remain current with and/or grow beyond job requirements.	Intrapersonal
Self Management	Demonstrates appropriate motivation, attitude, and self-control.	Intrapersonal
Setting Goals	Identifies short-term objectives and steps to achieve them.	Business
Solving Problems	Identifies solutions given available information.	Business
Staying Alert	Remains focused when performing monotonous tasks.	Intrapersonal
Taking Initiative	Takes action without needing direction from others.	Intrapersonal
Taking Smart Risks	Evaluates tradeoffs between potential costs and benefits and acts accordingly.	Intrapersonal
Team Building	Assembles productive groups based upon required skills, goals and tasks.	Leadership
Teamwork	Collaborates with others to achieve goals.	Interpersonal
Time Management	Plans and prioritizes work to maximize efficiency and minimize downtime.	Intrapersonal
Verbal Communication	Expresses ideas and opinions effectively in spoken conversations.	Interpersonal
Working Hard	Consistently strives to complete tasks and assignments at work.	Intrapersonal
Written Communication	Expresses ideas and opinions effectively in writing.	Business

Job Family Top Competencies

Using ratings from the JET and following the Configure job family structure, we identified the rank-ordered competency requirements of each of the job families. Specifically, we used the JET archive to identify studies examining jobs within each job family, and then aggregated those data to obtain rank-ordered competency requirements across all the jobs for each job family. However, because those studies used varying numbers of SMEs to complete the CET, we calculated mean ratings for each of the 62 CET competencies within each study. As such, each study contributed only one data point for each competency, ensuring that no single study biased the results for any job family. Using those study-level mean competency ratings, we calculated mean criticality ratings for all 62 HCM competencies for each job family, and rank-ordered those competencies in order of their criticality for successful performance in each job family. For example, SMEs across Sales jobs ranked Sales Focus among the most critical competencies for those jobs, whereas Safety Focus emerged as a critical competency for Operations and Trades. These criticality ratings provide the information for rank-ordering competencies in the job family templates in the Configure platform. Next, we discuss how we identified the most predictive HPI and HDS scales associated with performance for each competency.

Linking Scales to Competencies

The Hogan research archive contains information from over 950 research studies conducted from 1981 to the present. Each year, the Hogan archive is updated with approximately 10 - 15 criterion-related validity studies. These new studies allow Hogan to maintain and continuously improve the synthetic benchmarks we use as the foundation for our validation processes. In 2010, Hogan updated the synthetic meta-analyses, incorporating criterion-related validity results from over 250 studies.

Hogan used synthetic/job component validation research to identify the best predictors of performance dimensions that directly align to each competency. Synthetic validation involves (a) identifying the important components of a job or jobs comprising a job family, (b) reviewing prior research on the prediction of each component, and (c) aggregating correlations across multiple studies for each component to form a test battery (J. Hogan, Davies, and R. Hogan, 2007; Scherbaum, 2005). Based on studies with criterion data for at least one of the 62 HCM competencies, we conducted meta-analyses for HPI and HDS scales.

Meta-analysis is a statistical method used to average findings from multiple studies examining relationships between similar variables to estimate this relationship across jobs and organizations. Meta-analysis controls for error due to sampling, measurement, range restriction, and potential moderating variables (Smith & Glass, 1977). Hogan followed procedures described by (a) Hunter and Schmidt (1990) for correcting range restriction, (b) Barrick and Mount (1991) for criterion unreliability, and (c) Viswesvaran, Ones, and Schmidt (1996) for the mean inter-rater reliability coefficient. In addition, we reverse coded negatively oriented criterion variables to ensure that validity coefficients were consistently interpreted. Hunter and Schmidt (1990) argue that samples should contribute the same number of correlations to meta-analysis results to avoid bias. Thus, Hogan selected one criterion variable per competency per study, ensuring each sample contributed only one point estimate per predictor scale.

The resulting synthetic tables provide stable estimates of the relationships between each competency in the HCM and HPI and HDS scales. With the most predictive HPI and HDS scales identified for each competency, we next developed mathematical algorithms to score each competency in the Configure system. We explain our development of those algorithms below.

Configure Scoring Algorithms

For many work-related outcomes such as competencies, combinations of personality variables are more predictive than single personality scales used alone (Ones, Dilchert, Viswesvaran, & Judge, 2007; Tett & Christiansen, 2007). Consistent with this idea, we use algebraic equations to combine scores across multiple predictive personality scales to maximize the prediction of job-critical competencies in Configure.

Based on the synthetic validation evidence previously described, we identified the most predictive HPI and HDS scales for each competency. Specifically, we selected the most predictive HPI scale, the most predictive HDS scale, and the next most predictive scale from either the HPI or the HDS to create mathematical algorithms to score each competency. Development of predictive algorithms using HPI and HDS scales balanced parallel approaches of qualitative, expert judgment-driven theory with quantitative, data-driven results. Only scales with both theoretical and empirical links were used in completed algorithms.

Using scale-based algorithms provides both predictive validity and interpretability. In addition, the algorithms are flexible and compensatory, which means that candidates don't "fail" by having one low score on any given scale. Scale-based algorithms also use normative percentile scores instead of raw scores, which unit weights the scales included in each algorithm and facilitates interpretation. In Configure, each competency score is based on global normative percentile scores.

Below, we present three examples of scale-based algorithms for selected competencies. Each algorithm uses a combination of HPI and HDS scales as described above.

- Leading Others = (Ambition + (100 - Skeptical) + (100 - Leisurely))/3

- Leveraging People Skills = (Adjustment + (100 - Excitable) + Interpersonal Sensitivity)/3

- Solving Problems = (Ambition + Adjustment + (100 - Imaginative))/3

Finally, we calculate an overall score across all critical competencies identified for a given role. We arrive at this score by averaging the percentile scores for the eight to ten critical competencies defined for the role. Each competency contributes the same amount of weight to the overall score. We recommend that companies use the overall score as an indication of a person's overall potential to successfully demonstrate behaviors associated with the competencies required for success in the job. The overall score enables users to rank-order candidates in terms of their overall potential to succeed, facilitating quick and easy identification of candidates whose underlying characteristics most closely align with the demands of a given job. However, the Configure platform also presents scores for each competency to facilitate a more nuanced comparison of candidates who may have similar overall scores.

For ease of use and interpretation, we also categorize individual competency scores and the overall potential score into six scoring levels. We determined the scoring ranges for each level by running simulations for each job family to equally distribute a global working population across six fit levels. By providing these scoring categories, we further facilitate score interpretation by allowing users to pair competency and overall scores for a candidate with categorical information indicating their level of potential to successfully demonstrate a competency or set of competencies.

Conclusion

Hogan's job family structure is derived from the EEOC's job classifications for U.S. employers. This ensures a clear and comprehensive organizing structure for a wide range of occupations. The resulting job family taxonomy also provides guidance for coding and categorizing jobs within the JET archive.

The HCM represents a significant improvement in Hogan's ability to provide clients with effective and easy-to-use competency-based solutions. These solutions allow clients to align personality assessment results with organizational interventions aimed at hiring successful employees and developing existing employees. Hogan developed the HCM using a unique and elaborate process to ensure that the model (a) comprehensively covers the majority of behaviors required for success across organizations, industries, and jobs; (b) easily maps onto the majority of competencies in existing academic and applied models; and (c) can be used to produce results that are both easy to use and understand. For every job we study, we gather SMEs' ratings about the criticality of all 62 HCM competencies in the CET section of the JET.

Using compiled CET data from thousands of jobs in the JET archive, Hogan is able to determine the most critical competencies required for success in each of the nine job families. Next, we use meta-analysis to determine validity coefficients for each HPI and HDS scale, and create synthetic tables based on those analyses to show the relationships between each HPI and HDS scale and each HCM competency. These synthetic tables allow us to identify the most predictive HPI and HDS scales associated with performance of each competency.

These predictive scales inform the development of scoring algorithms for each competency in the Configure system. Using algorithms allows us to maximize both the predictive validity and the interpretability of results. By also including an overall score for each candidate, we can describe each candidate's likelihood of successfully demonstrating the critical competencies required for success in a given job or job family.

The continuously growing use of competency models in organizations requires solutions that are based in research, not just business buzzwords and jargon. By providing a platform that is both predictive and flexible to client needs, Configure meets these challenges by providing accurate, interpretable personality-based information in a customized report tailored to specific job families or a client's own competency framework.

Part II

User Experience Overview

Distributed by Performance Programs, Inc. ~ www.PerformancePrograms.com ~ 1-860-388-9422

Templates

Hogan Templates

Hogan templates are pre-defined templates based upon specific job families. The Hogan templates are read-only and cannot be modified. You can view the competencies that make up a Hogan template by left clicking on the desired template. You will be taken to a new screen that displays the details of the template.
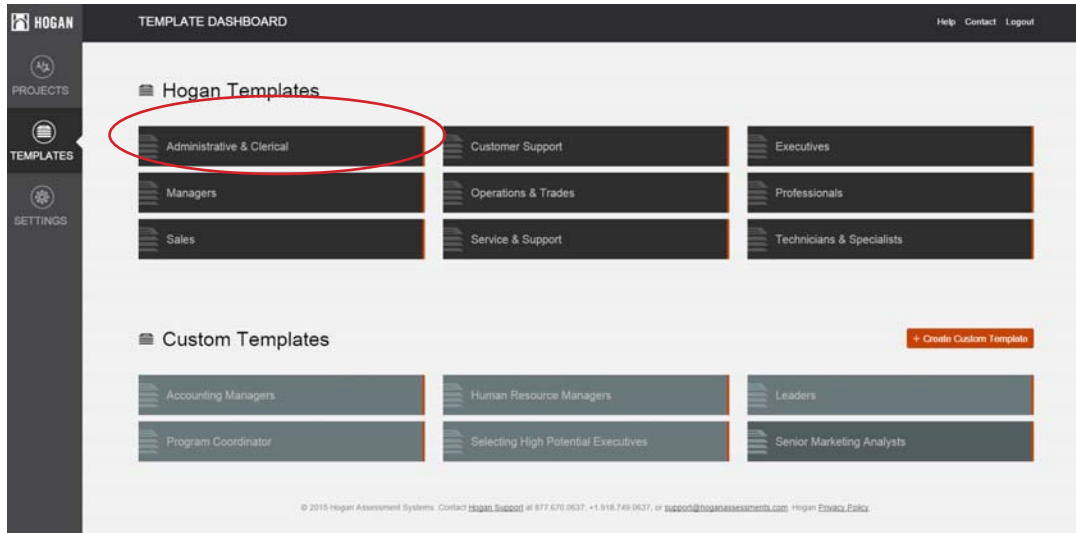
Creating a Project on a Hogan Template

To create a new project based upon a Hogan template left click the "+Create Project" button at the top right on the Template Details page. Follow the instructions in the "Create a New Project" section.
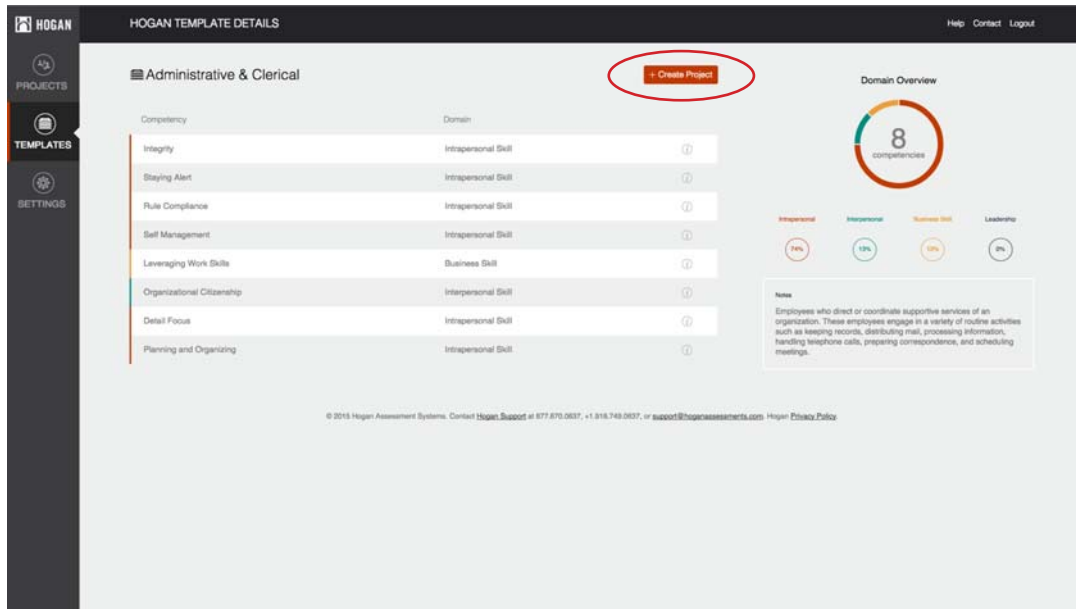
Creating Custom Templates

To create a custom template left click on the '+Create Custom Template' button on the Template Dashboard screen. You will be asked which Hogan template that you want to use as your starting template. Select the appropriate template from the drop down menu and then enter the custom template name in the space provided. Click on the "CREATE TEMPLATE" button to continue.

When the template is created it will resemble the Hogan template that it is based upon. The order and number of competencies will be the same. You may edit the order and number of competencies as well as add any additional competencies in this section. Each template can have a minimum of six and a maximum of ten competencies.
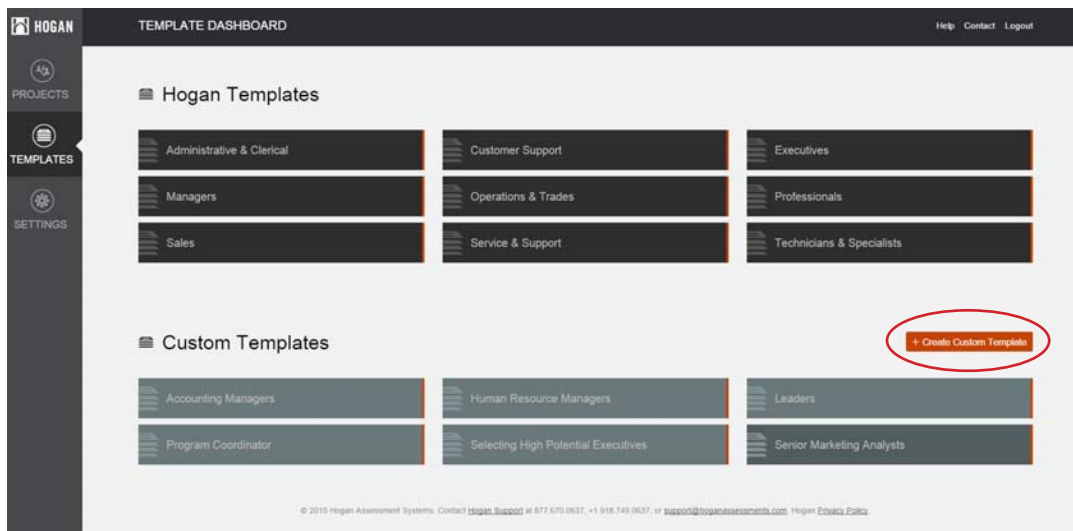
Creating a Project on a Custom Template

To create a new project based upon a custom template left click the "+Create Project" button at the top right on the Template Details page. Follow the instructions in the "Create a New Project" section.
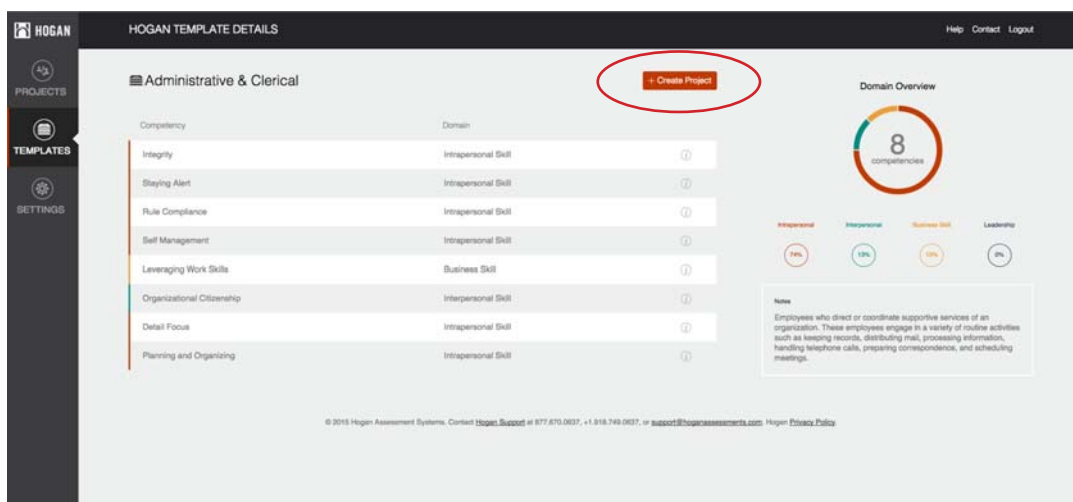
Adding Notes to a Template

Notes can be added to the domain by clicking on the pencil icon in the upper right hand corner of the "My Notes" field. Type the note or notes and click "SAVE". The notes will now be displayed whenever you view the template.
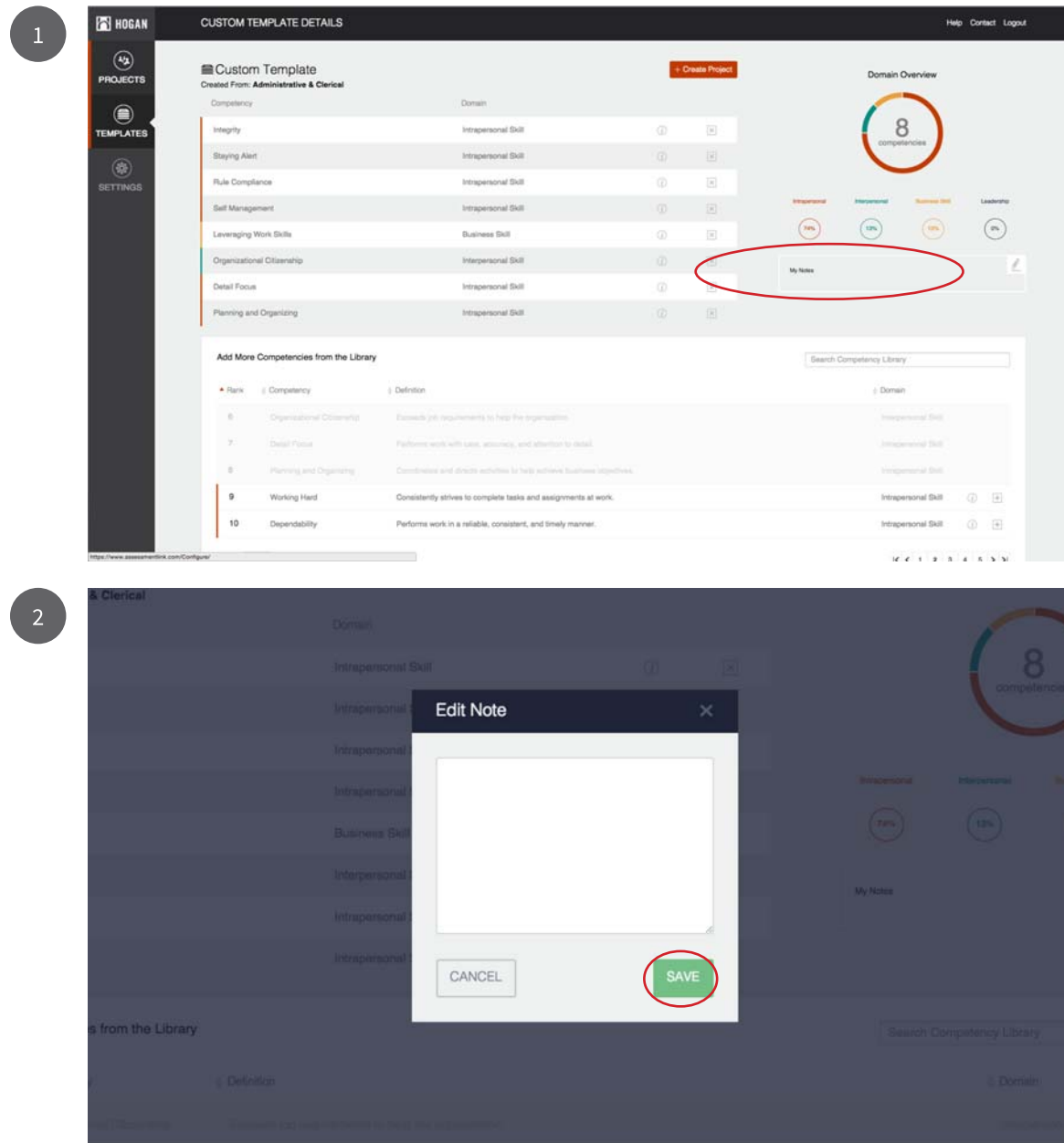
Saving a Custom Template

Configure automatically saves any changes made to a custom template. There is no user interaction required to save changes to a custom template.

Modifying an Existing Custom Template

To modify an existing custom template find the desired custom template on the Template Dashboard. Left click on the custom template name. Once on the Template Details page, you can modify any of the existing template parameters.

Competencies

Viewing Information about Competencies

To view a brief summary of a competency, left click on the 'i' to the right of the competency. A brief description of the competency will appear below the competency name.
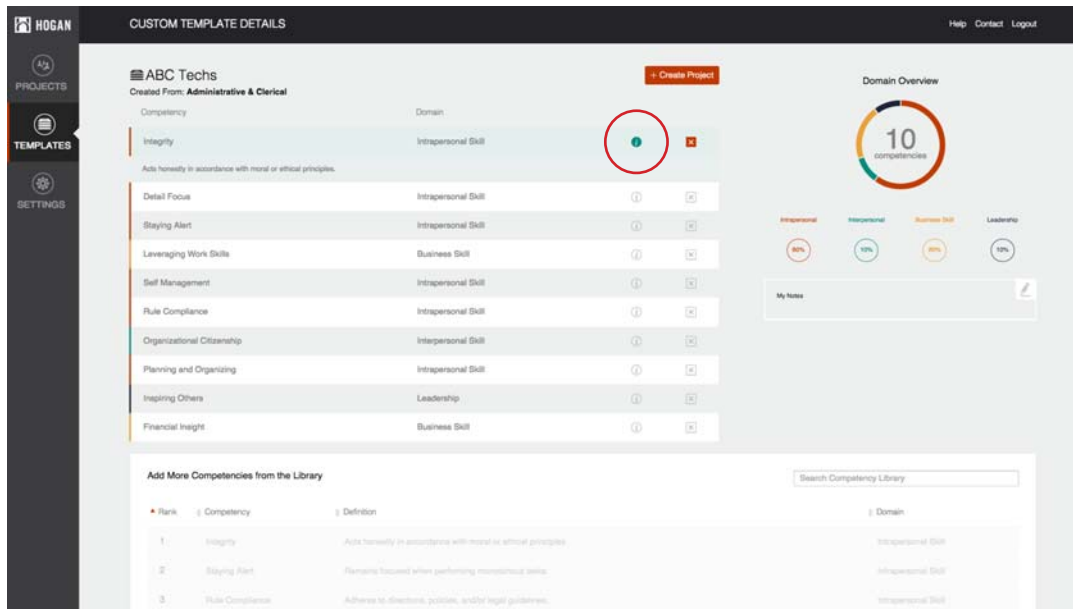
Deleting a Competency

To delete any of the competencies currently included in the template, click on the "X" to the right of the competency name. To add a competency to the template select the desired competency from the list at the bottom of the screen.   Click on the "+" to the right of the competency name and the selected competency will be added to the template.
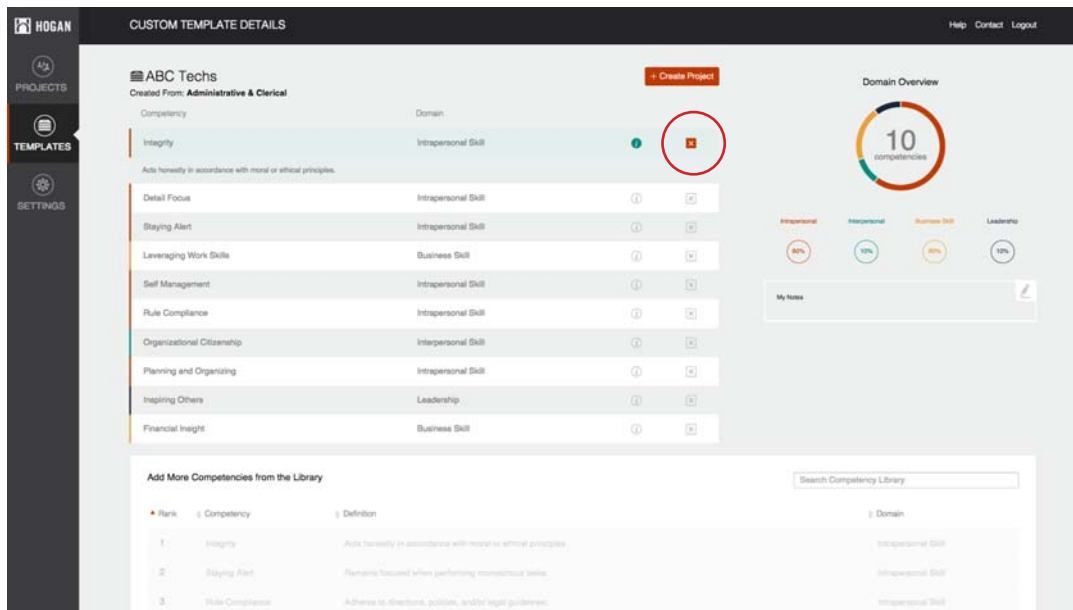
Reordering Competencies

If you wish to change the rank of a competency you can move it by clicking and holding it to drag it into the desired position.
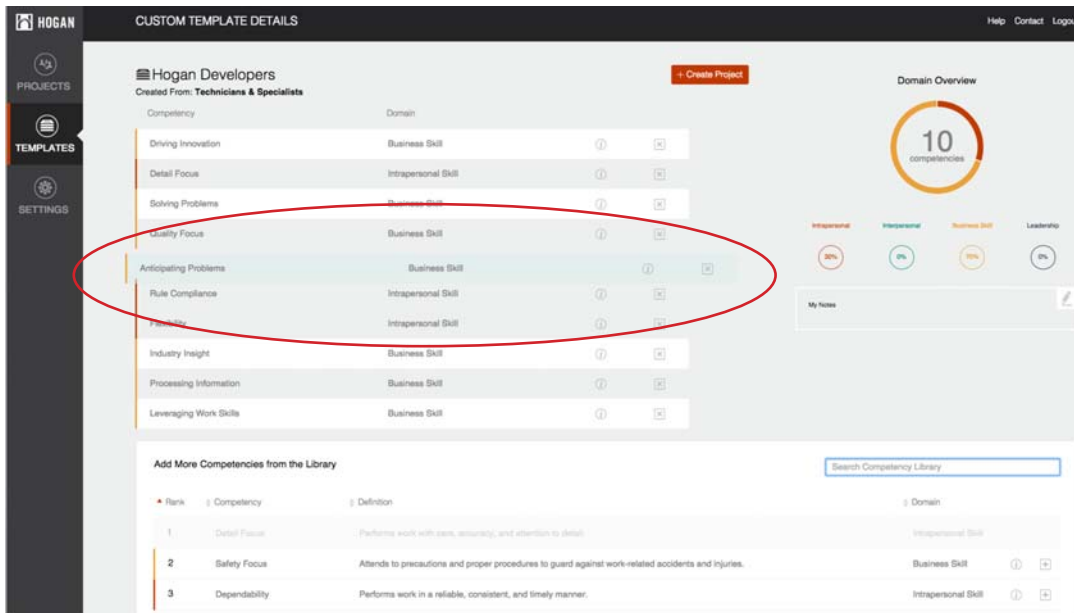

Adding a Competency

Additional competencies can found at the bottom of the Template Details page. You can search for competencies by typing in your desired search parameter in the search window located at the upper right of the competency list. The search function will search the competency name, description, and domain and automatically return your result set. When you have found the competency that you wish to add, left click the "+" icon to the right of the competency. The desired competency will be placed at the bottom of the competency list.

Distributed by Performance Programs, Inc. ~ www.PerformancePrograms.com ~ 1-860-388-9422
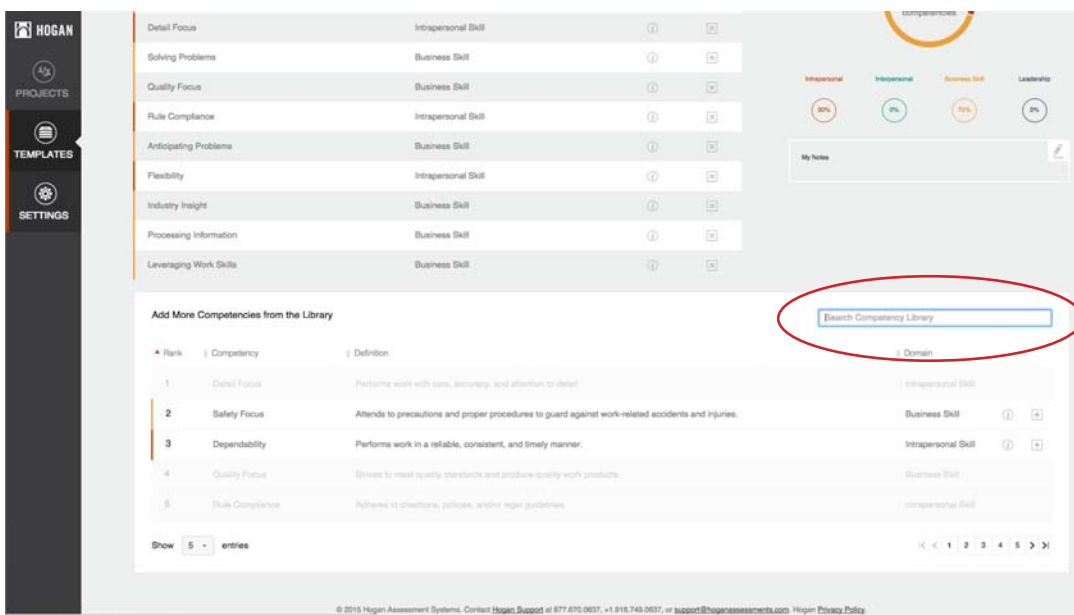
Projects

**Viewing a Project**

To view a list of projects, click on the "PROJECTS" button on the left side of any Configure screen. You will be taken to the Project Dashboard screen. On this screen will appear all of the projects that are currently set up in your Configure session. You may view your projects under the Project Dashboard. The default number of projects per page is 10. You can change the number of projects displayed by clicking on the "Show – Entries" pull down arrow and selecting a different number.
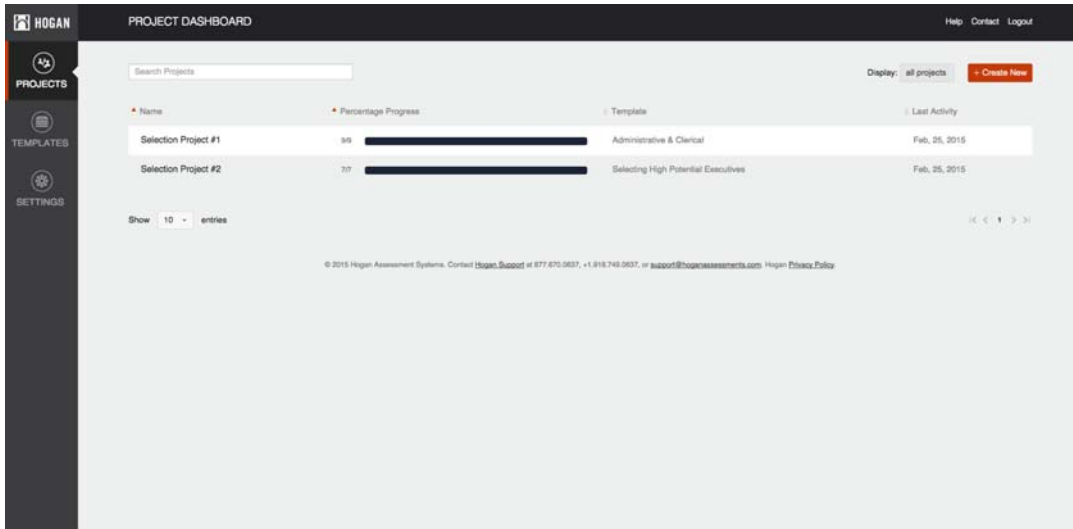

Searching for Projects

You can search for specific projects by using the "Search Projects" function at the upper left of the Project Dashboard. Typing in a word or words contained in the project name will return a list of projects that meet the criteria in the project list below.
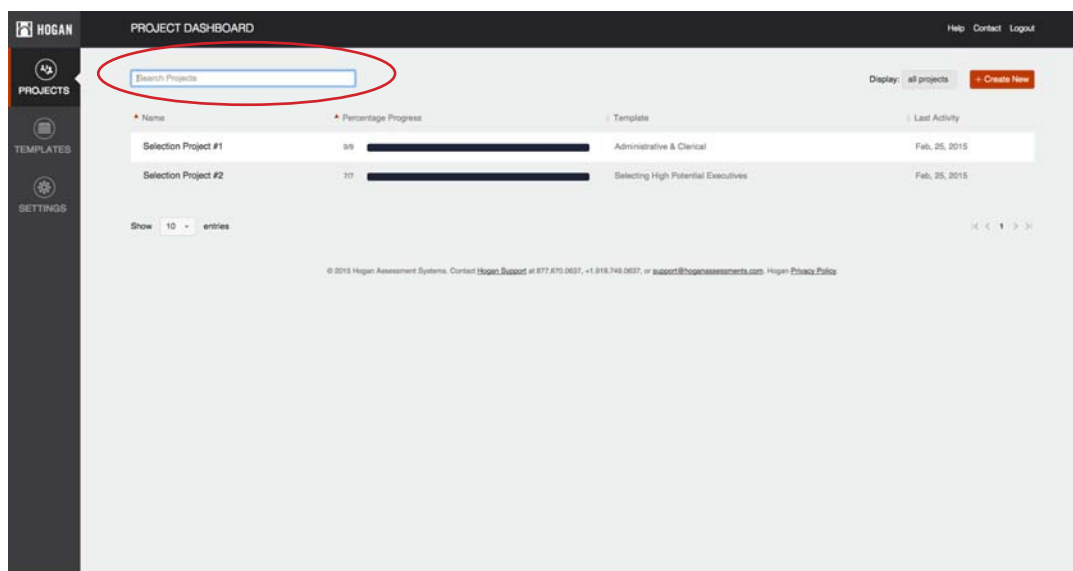
Filtering Projects

To filter projects based upon their completion status, use the pull down menu at the top. You can filter your projects from the items in the menu. The results will be displayed below.
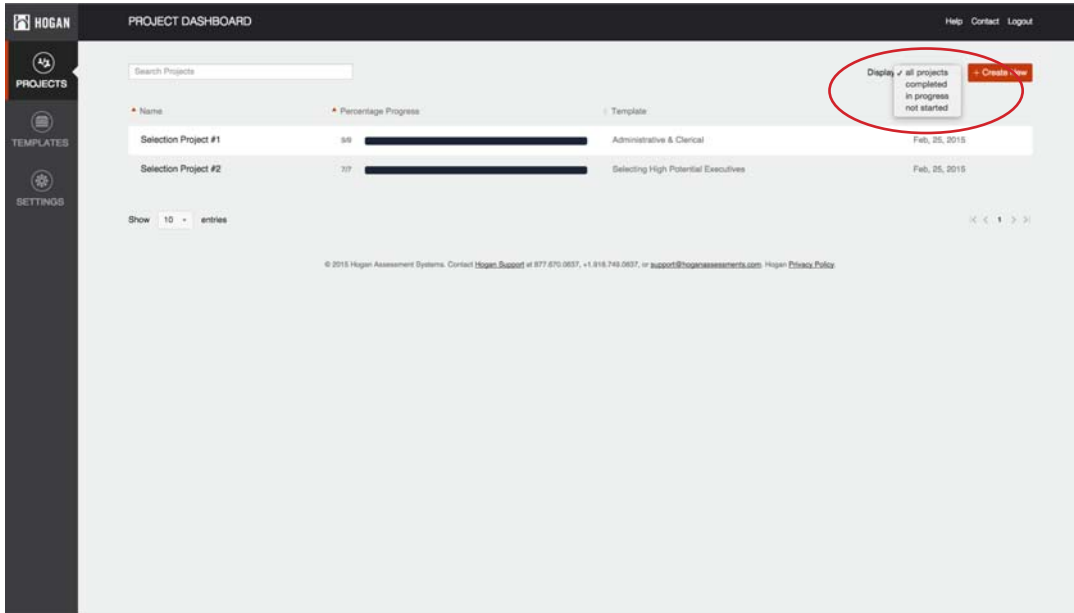
Project Progress

On the dashboard you can see the progress of the project. The "Percentage Progress" displays the total numbers of participants invited and how many have completed the assessments. Projects that have been created but have not yet been assigned to any participants will display a progress of 0/0.

Distributed by Performance Programs, Inc. ~ www.PerformancePrograms.com ~ 1-860-388-9422
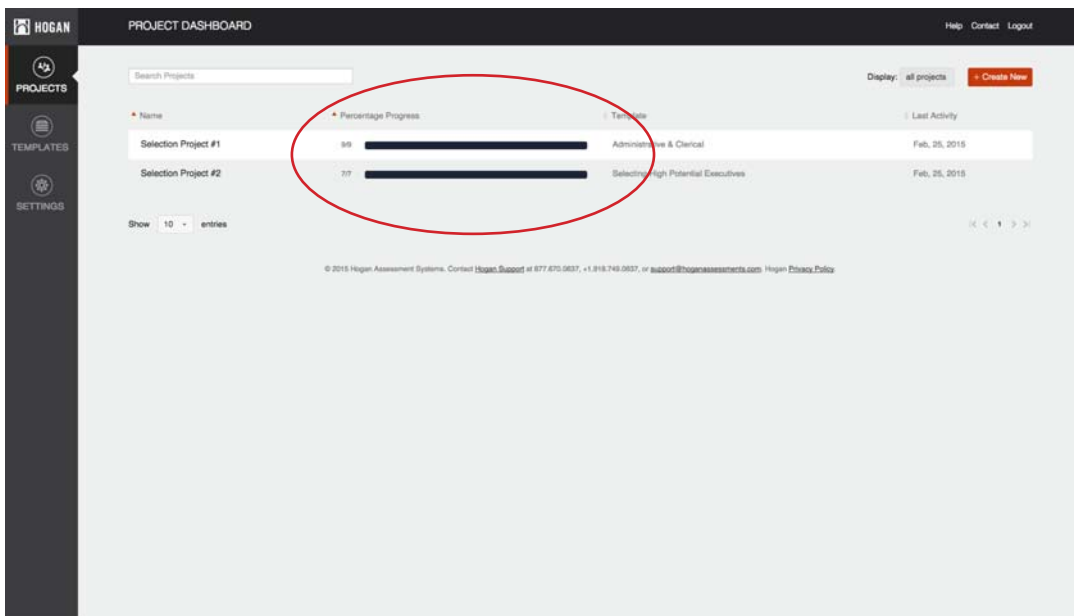
Create a New Project

There are two different methods to begin the creation of a new project. You can create projects from a Hogan or custom template or you can select the "+Create New" button from the Project Dashboard screen.

**Creating a New Project from the Project Dashboard.**

Click on the "+Create New" button on the upper right of the page to begin the project creation and a new screen will appear. You will be asked which template that you want to use for this project. After selecting the appropriate template, give the project a name. This name will be used in Configure to display the project in the future. Click on the "CREATE PROJECT" button to save the project name and continue to the next step.

Once the project is created, you will be taken to the next step in the process, which is to add participants. If you wish to add the participants to your project at a later date, you can click the "Exit" button at this time and return to the project at a later time.

Distributed by Performance Programs, Inc. ~ www.PerformancePrograms.com ~ 1-860-388-9422
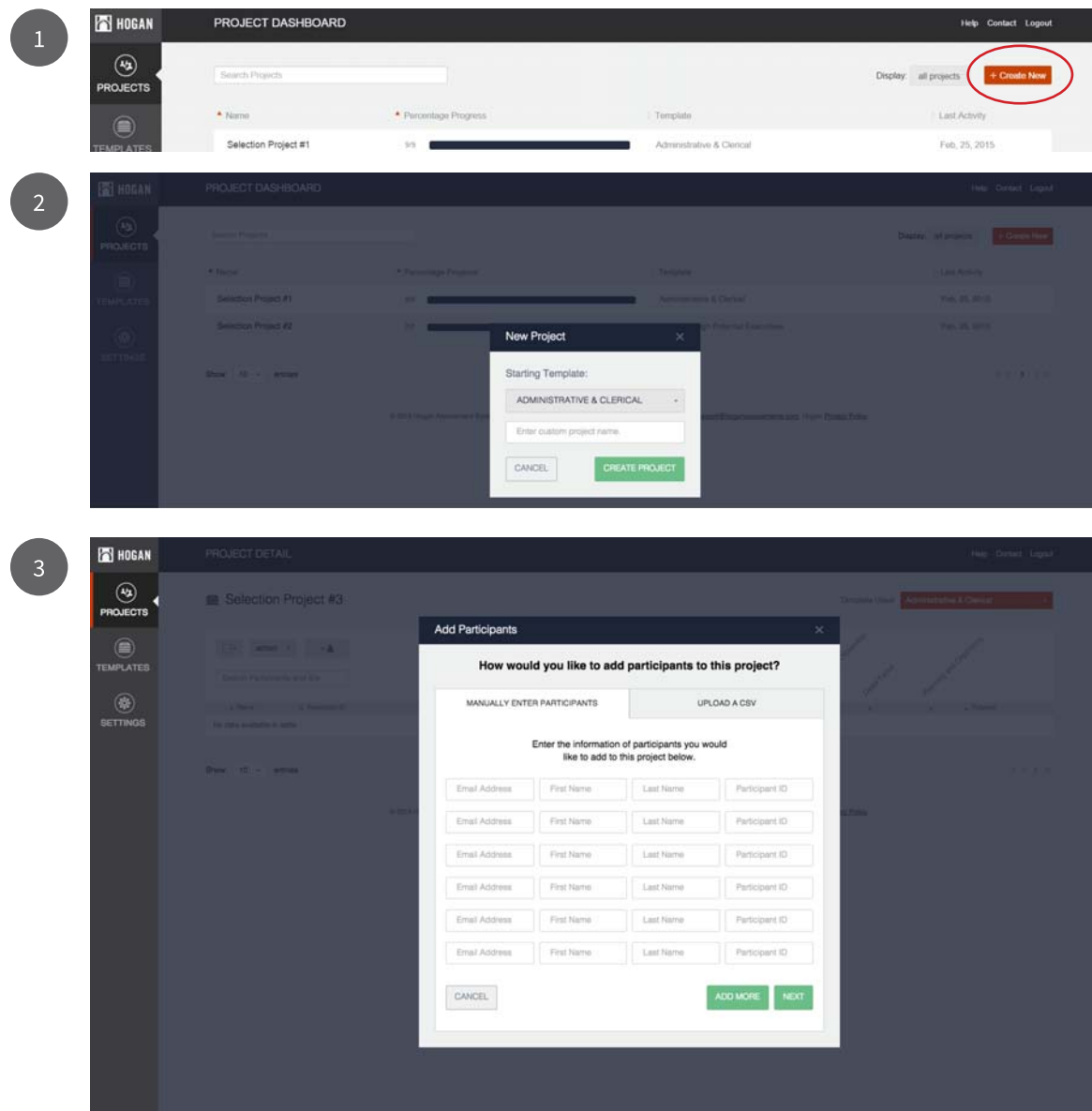
Creating a New Project from a Template

To create a new project from either a Hogan template or a custom template begin by selecting the desired template on the Template Dashboard screen. Left click on the template name to be taken to the Template Details page. Left click on the "+Create Project" button the upper right of the screen. Enter a new Project name and click on the "CREATE PROJECT" button to continue. For help in adding participants to the new project see the "Adding Participants to a Project" section.

Distributed by Performance Programs, Inc. ~ www.PerformancePrograms.com ~ 1-860-388-9422
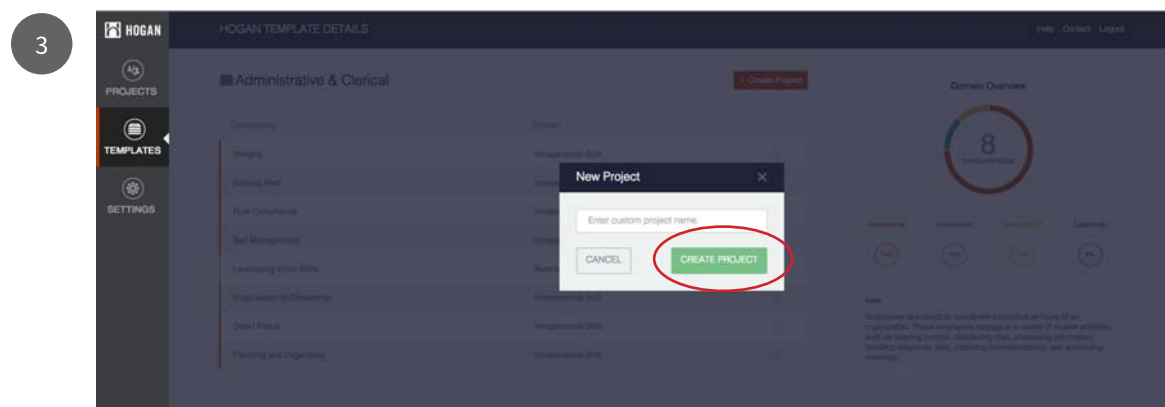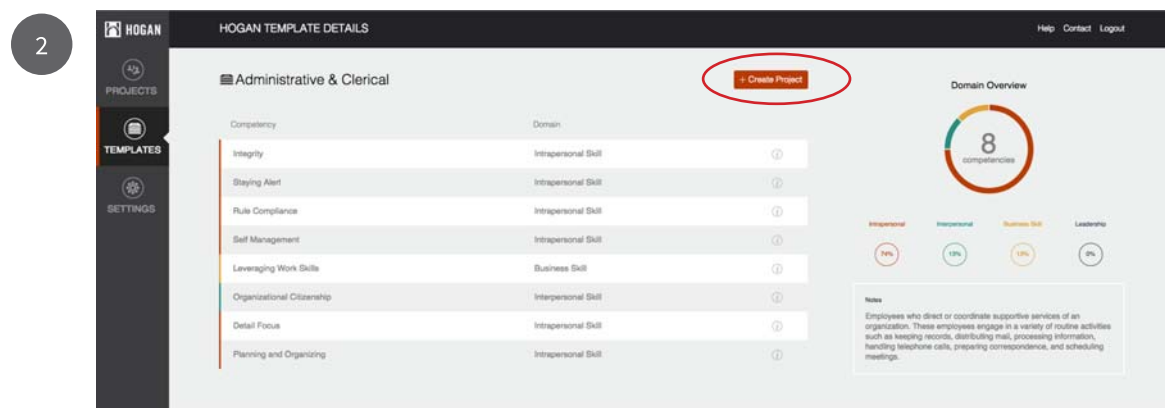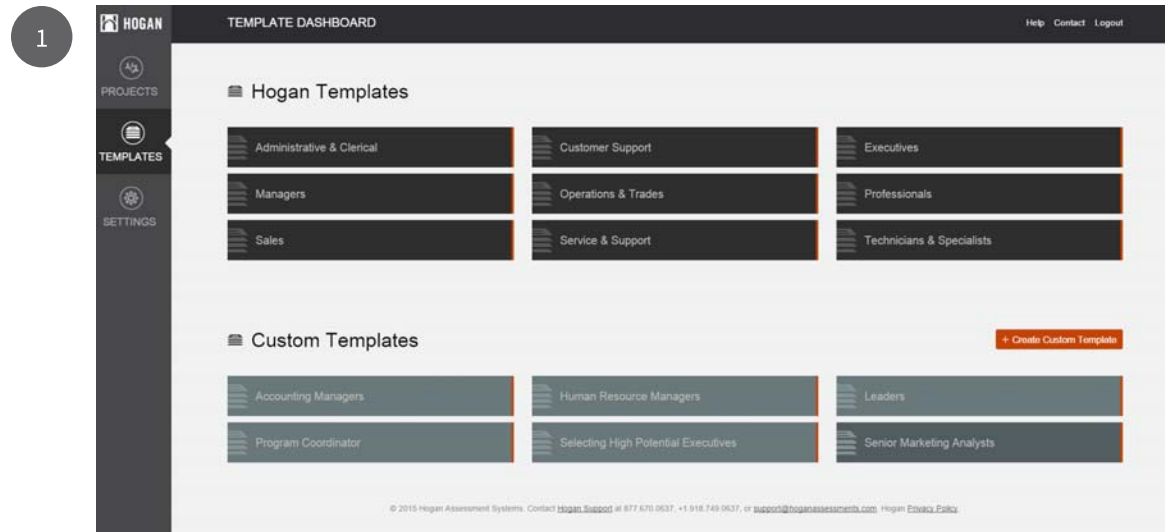
Adding Participants to a Project

There are two methods for adding participants to a Configure project. The first method involves manually adding them to a project by typing in the appropriate data. The second method is importing a file containing the data into Configure.

Manually Entering Participants to a Project

To manually enter participant data into a project, click on the "MANUALLY ENTER PARTICIPANTS" tab. On this screen enter the data requested in each box for each participant. The initial screen will allow up to six participants to be added. To add more than six participants click on the "ADD MORE" button. This will allow you to add six additional participants. Continue to click on the "ADD MORE" button until you have entered all of the desired participants. Once you have entered the participants, click "NEXT" to send the invitations to take the assessments.

Uploading Participants via a CSV File

Another method of loading participants into a project is by uploading them using a comma delimited text file, or CSV for short. This method allows you to enter several participants at once without having to manually enter each participant's data.

To upload the participants follow the steps listed in "Creating a Project" detailed above and click on the "UPLOAD A CSV" tab at the "Add Participants" tab. Once at the tab click on the "UPLOAD CSV AND CONTINUE" button. A window will open allowing you to select the file on your computer. Select the appropriate file and click "Open". The system will upload the participants contained in the file and bring you to the "Send Invitations" screen. To continue, follow the instructions provided in the "Sending Invitations to Partipants" section.

To successfully upload your CSV file, the columns need to be in the following order: First Name, Last Name, Email Address, Participant ID. Do not include any extra columns or Configure will not be able to understand and process the participants.
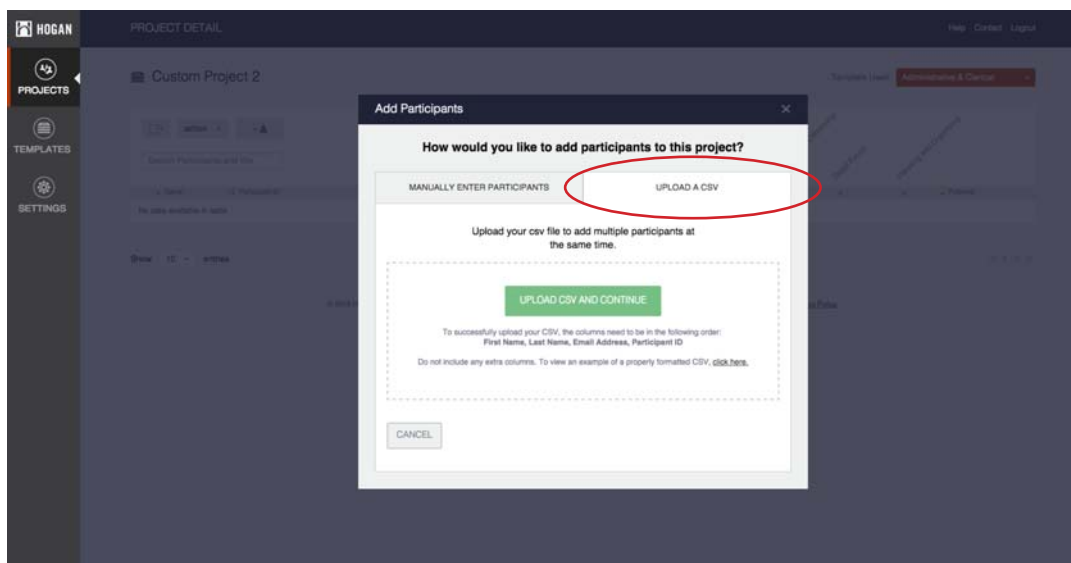
Adding Participants to an Existing Project

To add additional participants to an existing project, begin by selecting the project from the Project Dashboard. Left click on the desired project to be taken to the Project Detail page. Left click on the "+ 👤" button to add additional participants. For help on adding the participants see the "Adding Participants to a Project" section.
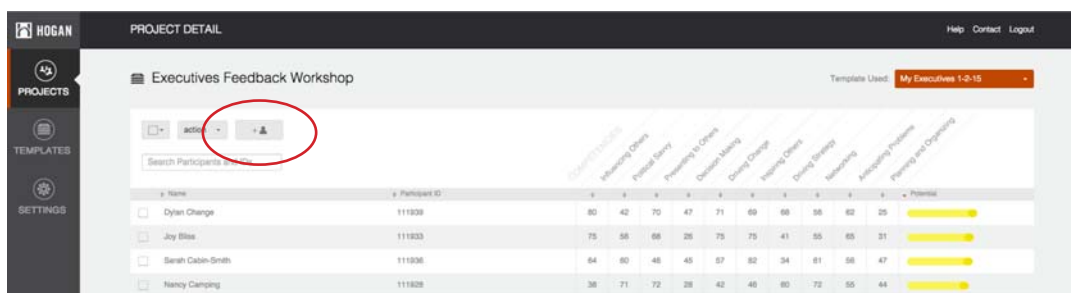
Sending Invitations to Participants

Sending invitations to participants via email is the final step in completing the project. After completing the entry of all participants in the project you will be taken to the "Send Invitations" screen. Here you can customize the email message that the participants will receive. You can modify the default email subject as well as the body of the email. In addition to modifying the static text in the body of the message there are several helpful tools that will allow you to further customize the invitation called Shortcodes. These Shortcodes allow you to insert dynamic information such as dates, names, email addresses, etc. into the email message. Listed below are the Shortcodes that are supported.

[ClientID] Client ID

[ClientName] Client Name

[GroupName] Participants group name

[HoganID] Participants's generated Hogan ID

[Password] Participant's generated password

[CandidateID] The custom User ID that the customer uses to uniquely identify a participant

[ParticipantName] Participant's full name

[FirstName] First name of the participant

[MiddleName] Middle name of the participant

[LastName] Last name of the participant

[ParticipantEmail] Email address of the participant

[ProjectName] Project name of the project the participant is being added to

[Today] Today's date in MM/DD/YYYY format

[Today+X] Today's date plus X number of days in MM/DD/YYYY format [ReportName]

Once you are satisfied with the invitation email click on the "FINISH & SEND INVITATIONS" for the emails to be sent to the participants. If you would like the completed email template to be your default configuration, click on the "Save these fields as the new default email template" located at the upper right of the invitation screen. To modify the default email template, see the "Modifying the Default Email Template" section.
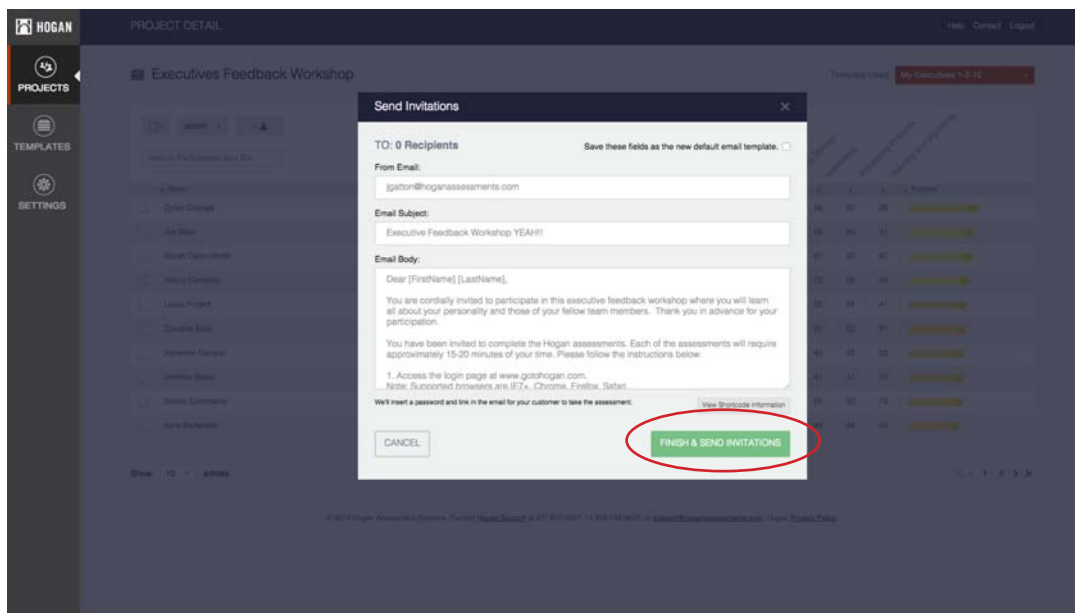
Exporting Scores from a Project

The participants' scores can be exported into a commaseparated file through the use of the "Export" function. Click on the box to the left of the participant name to select the appropriate individual or individuals. You can select everyone by clicking on the "box" icon at the top of the screen. Once the names have been selected click on the "Action" pull down menu and select "Export". A file will be downloaded using the project name. This file will contain the participant name, participant ID, the individual competency scores, and the overall potential score.
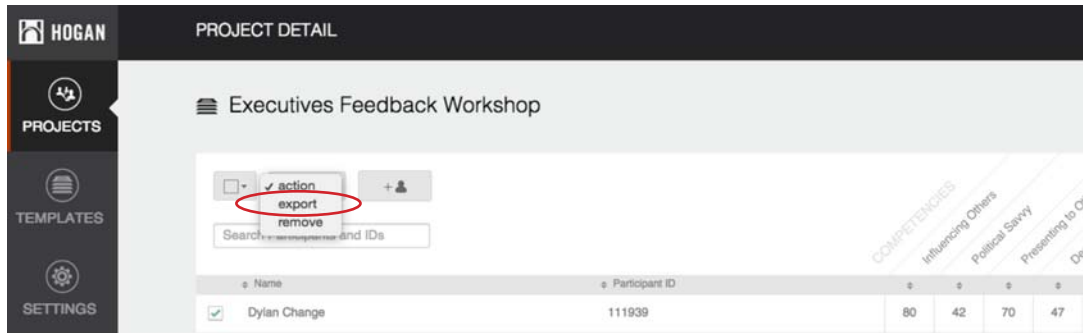

Deleting a Participant from a Project

A participant or participants can be deleted from a specific project. Go to the desired project by left clicking on the project name from the Project Dashboard. You will be taken to the Project Detail page. Click on the box to the left of the participant name to select the appropriate individual or individuals. You can select everyone by clicking on the "box" icon at the top of the screen. Using the "Action" pull down menu select "Remove" from the menu. These participants will now be removed from this specific project.
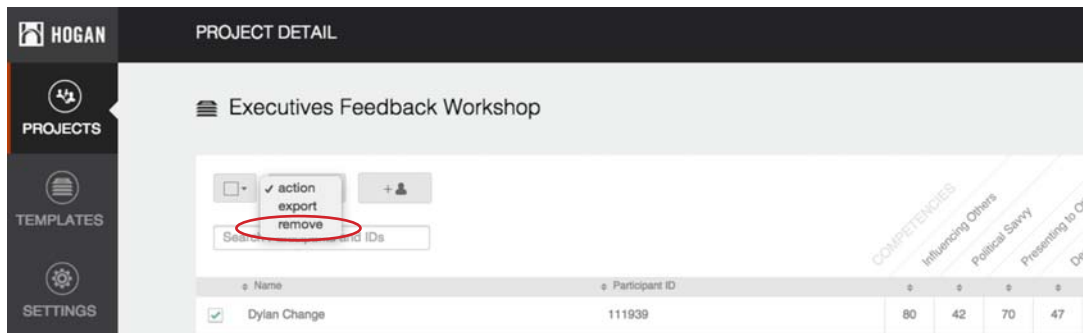
Modifying the Template in a Project

To change the template being used on a specific project, go to the desired project by left clicking on the project name from the Project Dashboard. You will be taken to the Project Detail page. Left click on the "Template Used" pulldown arrow on the upper right of the screen. All of the Hogan templates as well as all custom templates will be displayed. When you select the new template a dialog box will appear asking you to confirm the change to the new template. Click "YES, CHANGE TEMPLATE" to confirm the change or "NO" to cancel the operation.

29
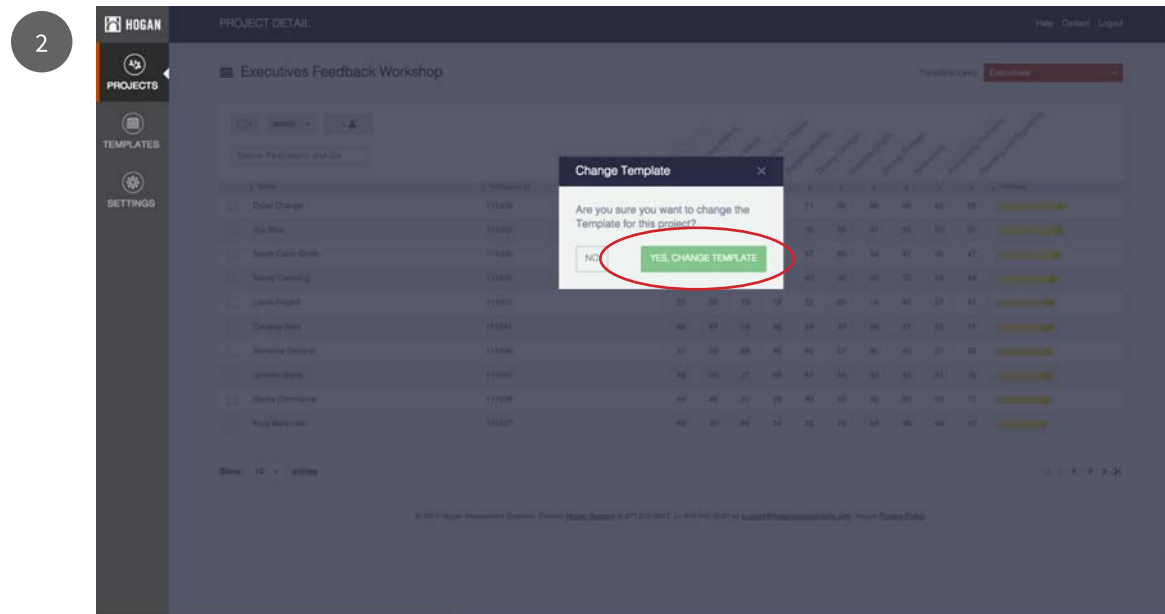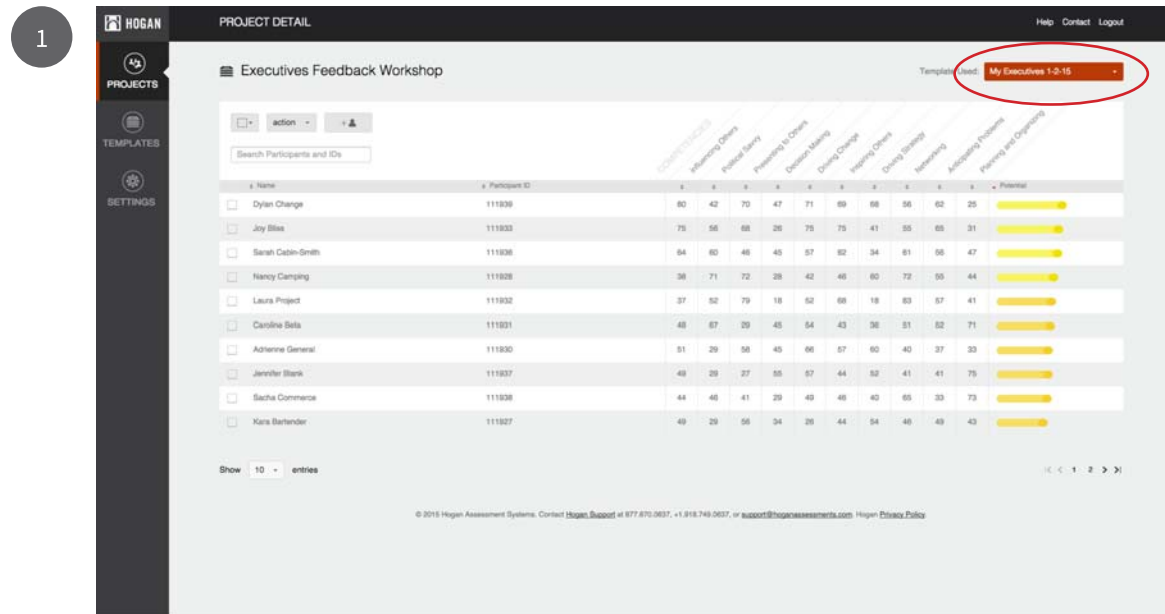
Settings

Modifying Default Email Template

The default email template can be modified in Configure so that the emails sent out to participants can be customized. To change the default email template left click on the "SETTINGS" button on the left hand side of any Configure window. Left click on the button "Edit Email Template" on the center of the screen to continue. You will be taken to the Edit Email Template screen.
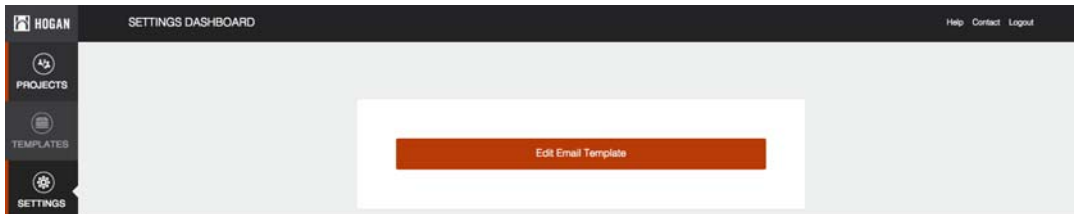
From here you can make any modifications and they will be saved as the default email template in your Configure session. You can modify the default email subject as well as the body of the email. In addition to modifying the static text in the body of the message, there are several helpful tools that will allow you to further customize the invitation called Shortcodes. These Shortcodes allow you to insert dynamic information such as dates, names, email addresses, etc. into the email message. Listed below are the Shortcodes that are supported.

[ClientID] Client ID

[ClientName] Client Name

[GroupName] Participants group name

[HoganID] Participants's generated Hogan ID

[Password] Participant's generated password

[CandidateID] The custom User ID that the customer uses to uniquely identify a participant

[ParticipantName] Participant's full name

[FirstName] First name of the participant

[MiddleName] Middle name of the participant
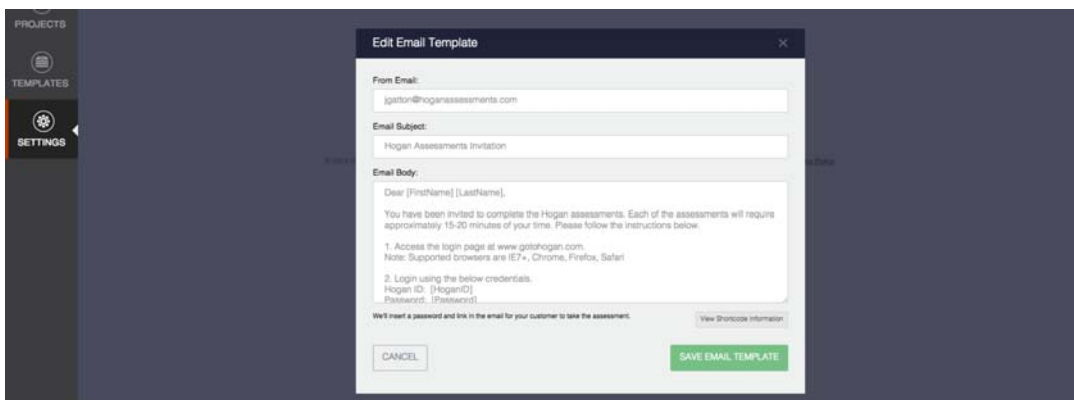
[LastName] Last name of the participant

[ParticipantEmail] Email address of the participant

[ProjectName] Project name of the project the participant is being added to

[Today] Today's date in MM/DD/YYYY format

[Today+X] Today's date plus X number of days in MM/DD/YYYY format [ReportName]

Distributed by Performance Programs, Inc. ~ www.PerformancePrograms.com ~ 1-860-388-9422

References

Barrick, M. R., & Mount, M. K. (1991). The Big Five personality dimensions and job performance: A meta-analysis. *Personnel Psychology, 44*, 1-26.

Bartram, D. (2005). The great eight competencies: A criterion-centric approach to validation. *Journal of Applied Psychology, 90(6)*, 1185-1203.

Equal Employment Opportunity Commission (1978). Uniform guidelines on employee selection procedures. *Federal Register, 43*, 38,290-38,315.

Foster, J.L., Gaddis, B.H., & Hogan, J. (2012). Personality-based job analysis. In M.A. Wilson, W. Bennett, S.G. Gibson, & G.M. Alliger (Eds.), *The handbook of work analysis: The methods, systems, applications, and science of work measurement in organizations* (pp. 249–266). London: Routledge Academic.

Hogan Assessment Systems. (2009). *The Job Evaluation Tool (JET)*. Tulsa, OK: Hogan Press.

Hogan, J., Davies, S., & Hogan, R. (2007). Generalizing personality-based validity evidence. In S. M. McPhail (Ed.), *Alternative validation strategies* (pp. 181-229). San Francisco, CA: Jossey-Bass.

Hogan, R., & Warrenfeltz, W. (2003). Educating the modern manager. *Academy of Management Learning and Education, 2*, 74-84.

Hunter, J. E., & Schmidt, F. L. (1990). *Methods of meta-analysis*. Newbury Park, CA: Sage.

Ones, D. S., Dilchert, S., Viswesvaran, C., & Judge, T. A. (2007). In support of personality assessment in organizational settings. *Personnel Psychology, 60*, 995-1027.

Scherbaum, C. A. (2005). Synthetic validity: Past, present, and future. *Personnel Psychology, 58*, 481-515.

Schippmann, J. S., Ash, R. A., Carr, L., Hesketh, B., Pearlman, K., Battista, M., et al. (2000). The practice of competency modeling. *Personnel Psychology, 53*, 703-740.

Smith, M. L., & Glass, G. V. (1977). Meta-analysis of psychotherapy outcome studies. *American Psychologist, 32*, 752-760.

Tett, R. P., & Chistiansen, N. D. (2007). Personality tests at the crossroads: A response to Morgeson, Campion, Dipboye, Hollenbeck, Murphy, and Schmitt. *Personnel Psychology, 60*, 967-993.

Tett, R. P., Guterman, H. A., Bleier, A., & Murphy, P. J., (2000). Development and content validation of a "hyperdimensional" taxonomy of managerial competence. *Human Performance, 12(3)*, 205-251.

Viswesvaran, C., Ones, D.S., Schmidt, F.L. (1996). Comparative analysis of the reliability of job performance ratings. *Journal of Applied Psychology, 81*, 557-574.

Warrenfeltz, R. B. (1995, May). *An executive-level validation of the Borman and Brush taxonomy*. Paper presented at the 10th Annual Conference of the Society for Industrial and Organizational Psychology, Orlando, FL.

Distributed by Performance Programs, Inc. ~ www.PerformancePrograms.com ~ 1-860-388-9422