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## **1. Managing the FeedbackOnline 360 degree process**

The FeedbackOnline administration account allows you to build your 360 degree questionnaires and then manage the different questionnaire rounds (groups of people) through the 360 degree process. It allows you to:

- Select the categories or frameworks that your clients/participants need and choose appropriate deadlines for each group of people
- Monitor the progress of your 360 degree rounds as the participants and respondents complete their 360 degree ratings and send out reminders as necessary
- Manage the way in which the process runs

### **1.1 Signup**

Before you can use FeedbackOnline you will need to sign up for an administration account. Follow the administration account signup link:

<http://www.feedbackonline.com/360Application/CreateAccount.aspx> from the "Demo & Free Trial" page <http://www.feedbackonline.com/index-DemoTrial.html> – and then fill in the required information. You will then be sent an email with an activation link. Click on the link to validate your email address and activate your account. You can then login in the normal way using your username and password.

If you do not receive the email, check your spam filter.

If you choose to sign up for a demo of the 360 degree process first then you will follow this link: <http://www.feedbackonline.com/360Demo/CreateAccount.aspx> - this link gives you access to the Demo area to test the 360 degree process with a limit of 2 participants and one questionnaire round – You can then transfer the information from the Demo area over to the "Live" 360 degree area to begin a 360 process for real.

### **1.2 Administration Home page**

The administration home page is the landing page you arrive at when you login to the FeedbackOnline tool. This is the overview page of the 360 degree questionnaire rounds (the different 360 degree questionnaire groups) that you have entered into the FeedbackOnline tool, on this screen you can:

- See at a glance how your 360 degree processes are progressing in terms of number of participants in the round, number of total respondents selected and number of respondents completed.
- Open up each individual questionnaire round to check the status in more detail and to send reminders manually
- Buy more credits

You can return to the Administration Home page by selecting the "Administration – Questionnaire Administration – Questionnaire Round Administration" path from the menu in the left hand side of the tool bar (Under the FeedbackOnline header image).

### **1.3 Buying credits**

If you have no credits in your account you can select how many participants you want to buy credits for and then pay for them securely by credit card via Paypal. The more participants you add credits for; the larger the discount on the individual participant cost.

Please contact us directly to arrange your purchase if it is over 250 participants. If you prefer to prepay offline you can do so and we will credit your account once we receive your payment.

### **1.4 Selecting Frameworks / Categories**

To begin to build a 360 degree framework or select from our standard frameworks we direct you to use our easy step-by-step Wizard.

In the "Administration" menu please follow the path to the wizard by selecting "Administration – Questionnaire Administration – Create Questionnaire Wizard" On this landing page you will see a set of tabs numbered from 1 to 5, which will guide you through the 360 degree questionnaire building process. Demo movies & manuals are available on each tab in the wizard to give you specific in-depth assistance when building your 360 degree questionnaire round.

There are a number of alternative ways to build a 360 degree questionnaire with the wizard including; Creating a questionnaire by selecting individual standard statements and arranging them into your own categories, selecting ready made categories from our frameworks to build up your own questionnaire, or simply choose one of our standard frameworks. To choose individual statements and build your own categories begin on TAB 1. If you choose to select from our standard categories then you can begin the wizard on TAB number 2, if you wish to use a standard questionnaire then you can begin on TAB number 3.

Work through the wizard step by step until you reach TAB 5 and after previewing the questionnaire and adding in your participants, you can then send the invitation e-mail and the 360 degree questionnaire will be activated (to see full instructions for the Wizard please download the Wizard manual or view the movies on each TAB). After the invitation to the participant has been sent the Wizard area will now be cleared and your 360 progress can be viewed and accessed via the Administration Home page.

### **1.5 Monitoring progress**

Return to the Administration Home page to monitor the progress of your 360 degree questionnaire rounds.

You can manually choose to remind participants via the pop-up detailed status page (which appears if you click the "green man" symbol to the left of the questionnaire round name). In this pop up you can manually send reminders for the participant to rate themselves, select respondents or to add in more respondents to get a better result.

Automated e-mails can also be used and this is set up in the Questionnaire Round information (TAB 4) where the deadlines for the questionnaire were entered in – If you selected to use automated e-mail then the system will take care of the checking and e-mailing of reminders for the selection of respondents, self ratings and respondent ratings.

## **1.6 Viewing reports**

Reports are generated from the Reports administration page. To reach this choose "Administration – Questionnaire Administration – Reports" from the menu. You will then land on a page which gives you choices of individual reports, group report and also comparison reports if there has been previous 360 degree results which can be exactly compared to new 360 results for an individual or group.

Reports will only be generated if there are enough responses in order to preserve anonymity with your respondents – Manager and Self ratings are always separated from the other relationships and so these 2 rating relationships are not anonymous in the reports

If the 360 degree process has been carried out as a multi-lingual questionnaire then you will also be able to choose the language you wish to generate the report in, the default is English (if no languages are available for the questionnaire you chose).

## **1.7 Custom Questionnaires**

If you have your own 360 degree questionnaire or competency framework which you wish to use instead of using one of our standard ones then please contact us for a customized pricing for this service.

## **2. Doing my own 360**

Your FeedbackOnline 360 degree process begins when you receive an automated email from FeedbackOnline informing you that you have invited by your organisation to complete a 360 degree process. You will need to keep the instructions in the first email received as this contains your login details.

You will then receive a second e-mail inviting you into a specific questionnaire round and this e-mail will also advise you of the deadlines for selecting your respondents and completing your self rating. This e-mail contains the link which takes you directly to the login page and there you enter in your login details from the first e-mail.

### **2.1 Participant Control Panel**

Once you have logged in you will see your Participant Control Panel and the questionnaire round you are included in will be listed (if you are included in more than one questionnaire round then you make a selection from the drop down menu in order to view the specific round information). You now need to:

- Select the Bio Data regarding basic information on yourself
- Add your respondents and then send the invitation to them
- Complete your own self-rating.

The control panel is where you as a participant can control your own 360 process. It is here that you can:

- Add in who you want to give you feedback (your respondents)
- Complete your self-rating
- Monitor progress and send reminders & thank you e-mails
- View your report when it is ready (if your organization approves individual report viewing)

## **2.2 Inviting Respondents**

In your control panel you have a button to "Add raters": click on it (click more than once to enter more than one respondent in) and in the pop-up enter the name and email address of your respondents and select the relationships you have with the respondents from the menu.

You can add as many respondents as you wish but for best results we recommend a total of 9 - 4 subordinates, 4 colleagues and 1 manager. If you do not have enough Subordinates or Colleagues then is not a problem - if there is not enough in one of these groups then the report generated will group all the raters as "respondents" to preserve anonymity.

You can check the progress of your 360 degree process at any time by looking at the boxed area which shows the numbers of ratings started and completed.

If you need to remind your respondents then make sure the box next to their e-mail address is checked and click the button "send reminder" - A reminder will only be sent to those who have not completed a rating for you - you will not be able to see who has completed or not as the process is anonymous (apart from the manager rating).

Any bounce backs due to incorrect e-mail addresses will be sent to the administrator for the round, who will then inform you of the problem. If the address is correct but the respondent has not received the e-mail invitation or reminder, then ask him or her to check the junk email folder.

## **2.3 Self-Rating**

Complete your own self-rating by following the link at the bottom of your participant control panel. You can save your work at any time and come back later, your answers will be saved each time you progress to the next page.

Once your questionnaire is completed it will be available for 3 days so you can return and change things if you need to. After 3 days or after the end deadline it is locked and you cannot access it again.

## **2.4 Viewing Your Report**

Once there is enough response from your respondents to generate a 360 degree report, which preserves the anonymity of your subordinates and colleagues, you will be able to view your report by clicking the link at the bottom of your control panel. Your administrator, however, may be holding the report until he or she is ready to release it to you.

## **3. Responding to a request for 360 degree feedback**

The request for feedback will arrive as an automated e-mail with a link. Read the email carefully and click the link to access the online questionnaire.

You do not need to have login details in order to access the system to complete the 360 degree questionnaire.

You can save your work at any time and come back later, your answers will be saved each time you progress to the next page.

Once your questionnaire is completed it will be available for 3 days so you can return and

change things if you need to. After 3 days or after the “end deadline” it is locked and you cannot access it again.

#### **4. Using FeedbackOnline as an individual**

You can use FeedbackOnline as an individual and independently of any manager or trainer. You will be able to choose from one of our standard range of questionnaire frameworks or categories and be able to complete the 360 degree process in the same way as described in the section “2. Doing my own FeedbackOnline 360 degree process”.

#### **5. Definitions**

**Statements** – Individual statements that can be selected and grouped into categories according to your category subject

**Categories** – Consist of the grouped statements, or information text pages required for the questionnaire. Categories come in 5 different types:

**Information Text** – A category that can be created to display various texts such as; introductory information before entering the questionnaire, or a thank you page at the end of the questionnaire.

**Statements** – Are categories containing groups of statements

**Likelihood** – This category consists of one question which asks how likely it is that the participant will act on the results of the questionnaire.

**Top List** – A category which lists all the statements selected for use in the questionnaire and asks for the rater to select only a certain amount of statements which they feel are the top strengths or top development areas for the person being rated (in their opinion)

**Open text** – A category that allows the rater to type in their opinions in the form of free text to be submitted (regarding the strengths or development areas of the person being rated).

**Questionnaires** – Are built up of the various different types of categories and usually contain; Introduction Page, Statements grouped into categories, Top List, Open Text, Likelihood, Thank you page

**Questionnaire Round** – Is where all the information about when the 360 degree process should begin, end & when results should be released; what questionnaire, e-mail templates and reply to address is used and what logos or colours should be shown in the rating process.

**Start Date** – The date the questionnaire becomes available for raters to enter and leave feedback.

**Selection Date** – The date that participants are required to go in and select their raters by

**Release Date** – The date from which the results are available

**Reply to e-mail** – The e-mail address visible to participants and raters in e-mail communications that are sent from FeedbackOnline (If there is an e-mail address registered in the organizational information level then this extra option allows use of another e-mail address which will be specific to that particular questionnaire round only)

**Questionnaire Round Information** – Text that is visible to everyone who is in the rating process of the questionnaire – This is visible on all pages throughout the whole rating process (can contain instructional text for users).

**Activate** – Activation begins when the “Send Invitation” button is hit and the e-mail invitations are sent to participants.

**Participants** – Are the people who are taking part in the 360 and are responsible for entering the information for their own chosen raters in their own control panel area.

**Raters** – Are the people chosen by the participants to give feedback.