













FeedbackOnline Wizard Manual

Key to symbols









Tab 1. Statements

-  Blue cross = Add new statement
-  Red Cross = Delete
-  Green dot with check mark = Statement is included in a category



Tab 2. Categories

-  Blue cross = Add new or existing category
-  Plus symbol = Expand Rows
-  Minus symbol = Collapse Rows
-  Double page symbol = Copy
-  Spanner = Edit
-  Red Cross = Delete
-  Green dot with check mark = Included in Questionnaire
-  Padlock = Standard category - Not editable
-  Blue Man = Category in use - Not editable



Tab 3. Questionnaire

-  Blue cross = Add new or existing questionnaire
-  Plus symbol = Expand Rows
-  Minus symbol = Collapse Rows
-  Double page symbol = Copy
-  Spanner = Edit
-  Red Cross = Delete
-  Padlock = Standard questionnaire - Not editable
-  Blue Man = Questionnaire in use - Not editable

Tab 4. Questionnaire Round

-  Blue cross = Add a new questionnaire round
-  Spanner = Edit Questionnaire

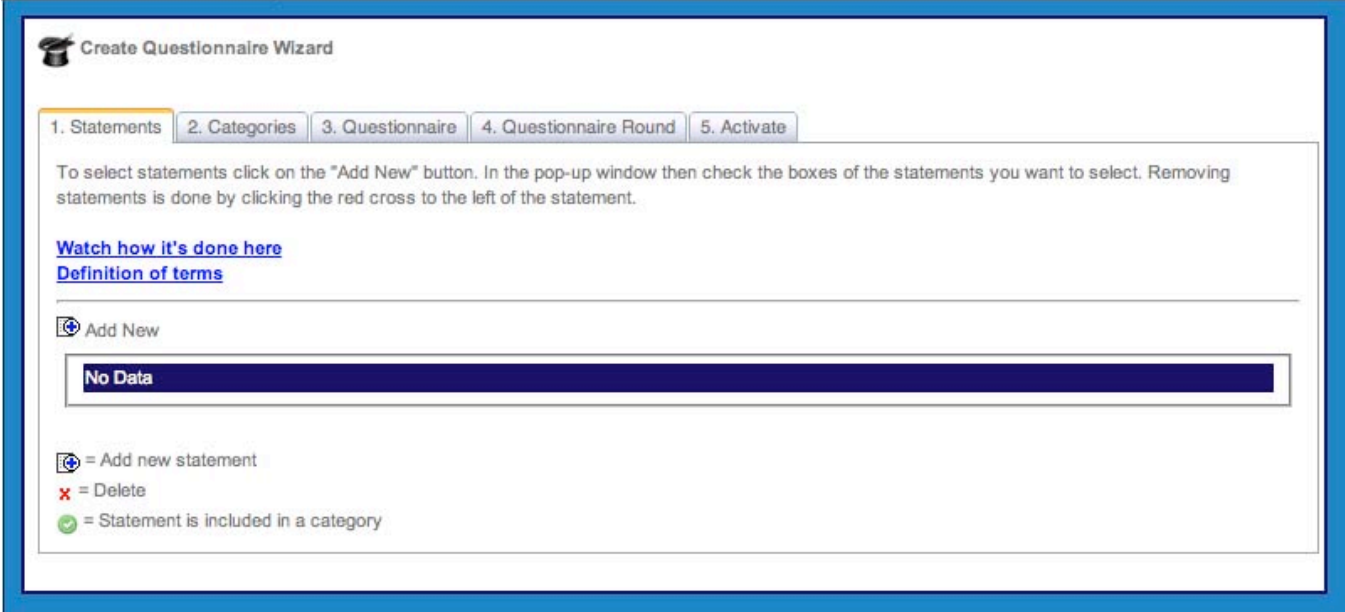
Tab 5. Activate

-  Green Man = Add/Edit/Del Participants to Questionnaire Round & see status
-  Screen with magnifying glass = Test Run Questionnaire

Introduction

There are a number of alternative ways to build a questionnaire with the wizard including; creating a questionnaire by selecting standard statements and arranging them into your own categories, selecting ready made categories from our library to build up your own questionnaire, or simply choose one of our standard questionnaires. 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

Tab 1. Statements



The screenshot shows the 'Create Questionnaire Wizard' interface. At the top, there is a title 'Create Questionnaire Wizard' with a small icon. Below the title, there are five tabs: '1. Statements', '2. Categories', '3. Questionnaire', '4. Questionnaire Round', and '5. Activate'. The '1. Statements' tab is currently selected and highlighted in orange. Below the tabs, there is a text box with instructions: 'To select statements click on the "Add New" button. In the pop-up window then check the boxes of the statements you want to select. Removing statements is done by clicking the red cross to the left of the statement.' Below this text, there are two links: 'Watch how it's done here' and 'Definition of terms'. Below the links, there is a button labeled 'Add New' with a plus sign icon. Below the button, there is a dark blue bar with the text 'No Data'. Below the bar, there is a legend with three items: a plus sign icon followed by '= Add new statement', a red 'x' icon followed by '= Delete', and a green checkmark icon followed by '= Statement is included in a category'.

If you are building a questionnaire by choosing a selection of your own statements then you begin on TAB 1. Firstly click the "Add New" symbol to view the statements you can select from. Simply check the boxes of the statements you want to use and click the "Add" button at the bottom. You will then see the statements you have chosen listed with a red "Delete" symbol, which can be clicked to remove the statements from the list if you change your mind.

Once the statements in this list are added into categories (in the next stage) then the "Delete" symbol will change to a green "Statement included in category" symbol - This allows you to quickly see if you have omitted to include any statements in your categories.

Tab 2. Categories

Create Questionnaire Wizard





1. Statements | **2. Categories** | 3. Questionnaire | 4. Questionnaire Round | 5. Activate

To create a new category (from statements selected in step 1) click the "Add New" button. In the pop up window firstly name the category, choose the category type and then enter a description for the category (both the name and description will appear on the 360 questionnaire and the report).










If you are creating a category which contains statements you then select which statements are to appear in the category from the drop down list and hit save.

To use standard categories from our library click the "Add existing category" button and a list of available categories will appear (these categories are not editable but can be copied in order to tailor make your own category). A key to symbols and a link to view definitions of the keywords is below.

[Watch how it's done here](#)
[Definition of terms](#)

 Add New  Add Existing Category  Expand Rows  Collapse Rows

Category	Description	Owner
No Categories.		

 = Add new or existing category
 = Expand Rows
 = Collapse Rows
 = Copy
 = Edit
 = Delete
 = Included in Questionnaire
 = Standard category - Not editable
 = Category in use - Not editable

To create a new category, click the "Add New" button. In the pop up window you firstly name the new category, choose the category type and then enter a description for the category (both the name and description will appear on the 360 questionnaire whilst rating and the printed report).

The screenshot shows a web form titled "Add/Edit" with a close button. The form contains the following elements:

- Name:** A text input field containing "New Category".
- Type:** A dropdown menu currently set to "Statements".
- Description:** A large empty text area.
- Organisation:** A dropdown menu set to "Demo" and a checkbox labeled "Standard" which is currently unchecked.
- Statements:** A section header followed by a tip: "Tip! Reorder list by drag and drop items." Below this is the text "No Items...".
- Statements:** A dropdown menu showing "Select..." and an "Add" button.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

There are five different types of categories, they are; Information Text (for example an introductory information page or a Thank You page, Statements, Top List (which allows the rater to pick a set number of the statements as strengths or development areas), Likelihood and Open Text. The standard contents of a 360 degree questionnaire consists of; Introduction Page, Statements, Top List, Likelihood, Open Text and finally a Thank You page.

Type 1 - Info Text - Allows you to enter in the text you want raters to see as either an introductory page or as a thank you page

Type 2 - The Statements type of category allows you to choose from a drop down menu the selection of statements you want to include in that particular category - The statements which you chose in the first step appear in the drop down menu

Type 3 - The Top List category requires you to enter a number, which will limit the number of boxes the rater can select for the top strengths or developments

Type 4 - The Likelihood category is non editable and therefore does not have the copy function.

Type 5 - Open Text - The Open text category can be copied and the descriptive text changed only

Standard categories are available for you to choose from, but these are not editable, if you want your own category to be roughly based on a standard one then you can choose the standard category, add it, then click the "Copy" symbol - the category is then copied and you can click the "Edit" symbol to change the name, description and tailor make the contents.

Contents of the categories are visible by clicking the expand symbol and hidden by clicking the collapse symbol.

Tab 3. Questionnaire

Create Questionnaire Wizard

1. Statements 2. Categories 3. Questionnaire 4. Questionnaire Round 5. Activate

To create a new questionnaire click the "Add New" button. If you create your own questionnaire then in the pop up window you name the new questionnaire and enter a description, then select which categories are to appear in the questionnaire by clicking the "Add categories" or "Add all categories" button, here you can change the order of the categories and information pages.

Alternatively you can choose one of our standard questionnaires by clicking the "Add existing questionnaire". A key to symbols and a link to view definitions of the keywords is below.

[Watch how to create a new questionnaire](#)
[Watch how to select a standard questionnaire](#)
[Definition of terms](#)

Add New Add Existing Questionnaire Expand Rows Collapse Rows

Questionnaire	Description	Owner
No Questionnaire.		

= Add new questionnaire
 = Expand Rows
 = Collapse Rows
 = Copy
 = Edit
 = Delete
 = Standard questionnaire - Not editable
 = Questionnaire in use - Not editable

To create a new questionnaire, click the "Add New" button. If you create your own questionnaire then in the pop up window you name the new questionnaire and enter a description, then select which categories are to appear in the questionnaire by clicking the "Add categories" or you can choose the "Add all categories" option, once you have added the categories into the questionnaire then you can click on the edit symbol to go back into the pop up to change the running order of the categories.

Add/Edit

Name:*

Active:

Description

Organisation:* Demo Standard:

Reorder Categories

Tip! Reorder list by drag and drop items.

- × [Info Page](#)
- × [Communication](#)
- × [Feedback](#)
- × [Top List](#)
- × [Open text](#)
- × [Likelihood](#)
- × [Thank you](#)

Insert...

Type: Select...
Category: None... Add

Save

Copy

Edit

Add

Select...

- Statements
- Open Text
- Top List
- Information Text
- Likelyhood

This is not a questionnaire and cannot be edited

Standard questionnaires are selected by clicking the "Add existing questionnaire". Standard questionnaires are not editable, but if you want your questionnaire to be roughly based on a standard questionnaire then you can first select the standard questionnaire, add it, then click the "Copy" symbol - the questionnaire will then be copied and you can then click the "Edit" symbol to change the name, description and tailor make the contents.

Contents of the questionnaire categories are visible by clicking the expand symbol and hidden by clicking the collapse symbol.

Tab 4. Questionnaire Round

Create Questionnaire Wizard

1. Statements 2. Categories 3. Questionnaire 4. Questionnaire Round 5. Activate

To begin a new Questionnaire round click on the "Add New" button, give the new questionnaire round a name, choose the questionnaire you want to use, set deadlines for start date, selection date (the deadline which participants must select their raters by), end date (when the questionnaire will close to users), select the e-mails templates for participants and raters and finally in the text box at the bottom you can enter text which will be visible to users when they are in the process of rating.

Once this information has been entered for a new questionnaire round hit "Save" and return to the menu screen. A key to symbols and a link to view definitions of the keywords is below.

[See how to create a new questionnaire round](#)
[Definition of terms](#)

Add New

No Data

= Add a new questionnaire round
 = Edit Questionnaire Round

To begin a new Questionnaire Round click on the "Add New" button, give the new questionnaire round a name, the questionnaire you have just created will appear automatically in the drop down menu, set deadlines for start date, release date, selection date, end date, select if you want to send e-mail via the automated system, choose the e-mail address to be used for communications, select the e-mails templates for participants and raters.

Add/Edit Questionnaire Round

Description:*

Questionnaire:*

Start date:*

Release date:*

Selection Deadline:

Reminder Frequency (Days):

Last submission date:

Send E-mail:

Requires approval:

Reply to address:

Participant Invitation Email:

Participant Reminder Email:

Reminder to Self Rate:

Reminder to add in:

Rater Invitation Email:

Rater Reminder Email:

Rater Thank You Email:

Upload image (800x122 pix, 72dpi, gif):

Image filename:

Background color (e.g. #1c75bc):

Instructions: The image will replace the blue "FeedbackOnline" logo on top on the questionnaire round. It will also be visible in the reports for this questionnaire round. The background color needs to

Add/Edit Questionnaire Round

Description:*

Questionnaire:*

Start date:*

Release date:*

Selection Deadline:

Reminder Frequency (Days):

Last submission date:

Send E-mail:

Requires approval:

Reply to address:

Participant Invitation Email:

Participant Reminder Email:

Reminder to Self Rate:

Reminder to add in:

Rater Invitation Email:

Rater Reminder Email:

Rater Thank You Email:

Upload image (800x122 pix, 72dpi, gif):

Image filename:

Instructions: The image will replace the blue "FeedbackOnline" logo on top on the questionnaire round. It will also be visible in the reports for this questionnaire round. The background color needs to be in rgb format, e.g. #1C75BC. This color will replace the standard blue background color in the questionnaire.

[Download customization specifications](#)

You can also upload a logo header which is visible to raters in the questionnaire and is printed as the report header, you can also choose a different background color if required.

Once this information has been entered for a new questionnaire round hit "Save" and return to the menu screen.

Tab 5. Activate

The screenshot shows the 'Create Questionnaire Wizard' interface with five tabs: 1. Statements, 2. Categories, 3. Questionnaire, 4. Questionnaire Round, and 5. Activate. The 'Activate' tab is selected and highlighted in yellow. The main content area contains the following text:

To preview the questionnaire before you send out invitations to participants click on the Preview Questionnaire symbol.
[Watch how to preview a questionnaire](#)

To add participants into a questionnaire round click on the green man symbol, in the pop up which appears you can select participants already entered in the system or add new participants. To begin the questionnaire round check the participants boxes you wish to invite and hit the "Send Invitation" button.
[See how it's done here](#)
[Definition of terms](#)

Below the text is a dark blue rectangular box with the text "No Data" inside.

At the bottom, there are two icons with their respective functions:

- = Add/Edit/Del Participants to Questionnaire Round & see status
- = Test Run Questionnaire

To preview how the questionnaire looks to raters before you add participants and send out the invitations click on the Preview Questionnaire symbol. If you wish to reorder or delete any parts of the questionnaire after previewing the questionnaire then you can return to the relevant tab and make the changes.

To add participants into a questionnaire round click on the green man symbol, in the pop up which appears click the "select participants" button and a pop up appears which lists existing participants (if there are any in the system already) if the participant doesn't appear in the list then click on the "add participant" button and add in the participants information such as; name, e-mail, phone number if required, language of choice and finally you have a choice of generating an automatic password for the participant (which you choose by checking the "Auto generated password" (recommended) or you can enter a manual password in for the participant.

Add/Edit Participant

First name:*

Last name:*

Email:*

Mobile phone:

Language:

Auto Generate Password:

Password:*

Repeat password:*

Send Creation Email inc. Password:

If you want to send any of the new participants the "Set Up" mail, which contains the participants login information to access their personal control panel, then you need to check the box "Send creation e-mail inc. password:" once you click on "save" then the e-mail (containing their login information) will be sent to the participant.

The "Set Up" e-mail does not contain the invitation & link for the participant to start any 360 questionnaire yet, it simply gives them login information – The invitation for the 360 questionnaire is sent to participants after you have added them and returned to the first window "Edit questionnaire participants". Here you then check the box next to the participants you want to invite and hit "send invitation". The questionnaire is now active and cannot be edited.