

## FeedbackOnline HR Administration Manual

### Step 1 - Choose Statements to build up categories or pick standard categories

Choose "Add/Edit Questionnaire Categories" from the "Questionnaire Administration" menu. This brings up a list of categories already built for the organization.

The main categories in a standard questionnaire are:

- Introduction page – Containing any relevant information that the rater will need to know
- Statements – category follows a specific subject e.g. feedback, communication, organization etc.  
\*\*(Statements can be grouped into individual categories for each specific subject if required)
- Strengths/Development areas (this category lists of all statements in questionnaire i.e. the Top List category)
- Likelihood of taking action – A set scale to measure whether the participant will take action after receiving the results of the 360
- Open Text page – This page can also be used after each category to provide options for comments
- Thank You page

If you want to create new categories (this needs to be done before you put all the categories together to create a complete questionnaire) click the "add new" symbol (blue cross) – A pop up appears where you will choose/enter; the name of the category you want to create and the type of category you are creating.

Selecting "Information Text" in the "Type" drop down menu will bring up a free text box where you can enter your own introductory welcome text which participants will see when they follow the link they receive in the e-mail into the 360. This type of category is also used for the Thank You page.

Selecting the option "Statements" in the "Type" drop down menu will then list the statements available to add into the category. They are then added from the drop down menu one by one to build up the category.

Selecting the option "Open Text" in the "Type" drop down menu will give you the an option to create a specific Open Text category, enter in the "describe" box the text you want to appear above the Open Text box(es). Then select the Open Text sections you want to use in this category from the drop down list at the bottom of the pop up.

Choices of Strengths or Development areas are standard in the tool - If additional Open text sections are needed for free text other than the Strengths/Dev areas then these have to be created by a System administrator first.

In the "Top list" category creation you can select the maximum amount of checked boxes you want to allow by entering in the number where it says "Top List Answers". This page is a summary of all the statements included in the 360 questionnaire that the rater can pick a set number of strengths or developments from.

Selecting the "Likelihood" option gives you the option to enter in your own text for the description but it uses the likelihood pre-set question.

Once all the individual categories are built you can then proceed to put them together into a questionnaire format.

**Step 2** – Create the Questionnaire by choosing the various types (Text, Statements, Top List, Open Text and Likelihood categories) of categories needed in questionnaire.

Choose "Add/Edit Questionnaires" from the "Questionnaire Administration" menu – This will show a screen with any questionnaires already built for the organization.

To add a new questionnaire click the "add new" blue cross and a pop up will appear where you name the questionnaire you are creating and write a description. To add categories (and to start to build up the questionnaire) you choose from the drop down menu at the bottom of the pop up screen.

First choose the type of category for the questionnaire (left drop down menu. Then select the category (from the choices available) for the type you have chosen with the drop down on the right side.

Keep adding in categories until you have built up the questionnaire with all the parts you want to use – Remember, the order of how you see the categories in this pop up is how they will look in reality, so if they are not in the correct order they can be dragged and moved by clicking on the blue circles to the left of the category name – The red crosses next to the category names allow you to delete the category from the questionnaire (this is only allowed when the questionnaire is not being used in any other 360 degree processes for the organization).

**Step 3** - Add participant name, e-mail and Language (Bio Data is given by the participant on login before they can proceed to rate themselves).

Choose "Add/Edit Participants" from the "Questionnaire Administration" menu – This will bring up a list of participants already entered in for the organization you have chosen in the drop down menu in the toolbar.

There is a search facility if the list is too long so you can search for names of people to see if they are already entered into the organization.

To add a new participant into the organization click "add new" blue cross and a window pops up where you simply enter the Name, e-mail, Tel no and the native language (if available). The system can either generate an automatic password for the participant (which you choose by checking the "Auto generate password" (recommended) or you can enter a manual password in for the participant. If you want to send the participant the

creation e-mail (which has the participants unique login details for permanent use in the FeedbackOnline tool) then you need to check the box "Send creation e-mail inc. password:" once you hit save then the mail will be sent to the participant – This e-mail does not contain any link for the participant to any 360 degree process it simply gives them login information – the invitation to take part in the 360 degree process is included in step 6 once the activation of the questionnaire round is done.

**Step 4** - To create the 360 degree questionnaire round by selecting what questionnaire to use and what e-mails and deadline dates and automation for e-mails etc.

Choose "Questionnaire Round Administration" from the "Questionnaire Administration" menu – This brings up a snap shot menu of all questionnaire rounds available for the organization you are in.

To add a new Questionnaire round click on the "add new" button.

In this pop up you are asked to; give the new questionnaire round a name, choose the questionnaire you want to use (the questionnaire which was built in step 2), set deadlines for start, selection date (the deadline which participants must select their raters by), end date (when the questionnaire will close to users), choose whether to use the automatic reminders via e-mail and set the frequency of automatic e-mails sent (the automatic e-mail checking and reminding system will check to see if a person has selected raters, completed their self rating and also check if the invited raters have completed the process – if the system finds that something has not been completed then an automatic reminder is sent).

You also select the e-mails to use for the participants and raters (standard e-mails are available off the shelf, if you wish to have tailor made e-mails then this needs to be carried out by a system administrator).

Once this information has been entered for a new questionnaire round hit save and return to the main menu screen: "Questionnaire Round Administration".

You can then just view information on a questionnaire round that already exists information (including the questionnaire used for the round, start date, end date, release date, number of participants, number of raters, number of ratings completed and the percentage that represents) you can see it all simply listed in this menu. The green man symbol is used to add participants into a questionnaire round and the spanner is clicked to edit the questionnaire round details.

**Step 5** - Send invitations and begin round

To add participants into the new questionnaire round you created in Step 5 you click on the green man next to the questionnaire round name – this brings up a pop up where you see the participants listed - if any participants already have been entered into the questionnaire round then this is where they will appear.

In the screen you can add in participants (by clicking "select participants") and see the status of all the participants in that particular questionnaire round – you can see if they have selected any raters, what type the raters are and if any have completed rating. In this

pop up screen you add participants in by clicking "select participants" - You can also add more participants into an existing round by clicking "select participants" a pop up appears and a list of available participants for this organization will appear for you to choose from (the participants were added into the organization at step 3). After you have added in participants to invite them you must check the box on the far right side of the pop up and then hit the "send invitation" button this then sends an e-mail with the link that they need in order to access their 360 degree questionnaire.

From this pop up you can also manually send reminders to the participants for them to; Add raters (if they have not selected any raters at all), self rate or ask them to add more raters in if the response from their chosen raters is not enough to generate a report.

### **Step 6** - Monitor and send reminders

Once a 360 is in progress you can see in a snapshot menu the questionnaire used for the round, start date, end date, release date, number of participants, number of raters, number of ratings completed and the percentage that represents.

You can also view the individual participants status by selecting the "Participant Overview" from the menu.

This takes you to a choice via a drop down of which participant you want to take a look at - Choose one participant from the list and you will then access the individuals control panel area - This area is where the participant lands when they receive the invitation to join a 360 questionnaire round and it contains the basic information they need to allow them to add in their own raters and send their own invitations to the chosen raters.

### **Participant Control Panel Area**

From these 2 screens (the questionnaire round information screen and the participant control panel) you can monitor or send the reminders as the 360 process continues if you want to do the reminders on a manual basis - otherwise the automatic reminder system will take care of it for you.

On the Participants Control Panel there is a check box next to each e-mail address in case you or the participant needs to stop e-mails from being sent to a particular e-mail address.

From the receipt of the first e-mail the participant receives a login so they can access FeedbackOnline and add in the raters for their own 360 - they can also send reminders and thank you mails if required.

When they first login their participant control panel will only have their own name listed as a self rater in the "invited raters" box - To add in their raters they click on "Add Raters" then enter the e-mail, relationship and language of the people they are adding and hit save.

After the details have been entered in, the participant then invites the raters by clicking the "send invitation" button - An e-mail is then sent to all the raters with a link that they follow to enter FeedbackOnline and rate the participant.

Once the raters have been selected and invited by the participants and the Bio Data (specified by the organization) has been entered and updated then the participant can continue on to rate himself or herself via the link at the bottom of the page.

The reports can only be downloaded by participants if they have been approved or if they have enough response from groups in order to maintain anonymity for their raters.

### **Step 7** - Reports section

A complete administration area where you can download individual, group or organizational reports and either select the user language or choose another language to have the report in. Single reports download a pdf's and a batch of reports will download as a zipped file.

Comparison reports can also be generated on all levels and for the organizational reports filters can be applied according to gender, age, country and industry if necessary.