Your appraisal360 user guide

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Getting started

I am a manager or trainer controlling the 360 feedback process for a number of clients or employees (appraisees).

- Go to the section entitled "Managing a 360 project."

I am an appraisee doing a 360 under the supervision of a trainer or manager.

- Go to the section entitled "Doing my own 360."

I am a respondent and have been asked to give feedback on someone who is having a 360 report done.

- Go to the section entitled "Responding to a request for feedback."

I am an individual doing a 360 assessment independently or doing the free trial.

- Go to the section entitled "Using Appraisal360 independently."

Managing an Appraisal360 project

Your Appraisal360 trainer's account allows you to manage a group of people through the 360 feedback process. It enables you to:

- Purchase the worksets that your clients will need
- Manage your inventory of unused worksets and assign them to clients as and when required
- Monitor the progress of your clients as they complete their worksets and send out reminders as necessary
- Manage the way in which the process runs and end reports are delivered to your clients.

Signup

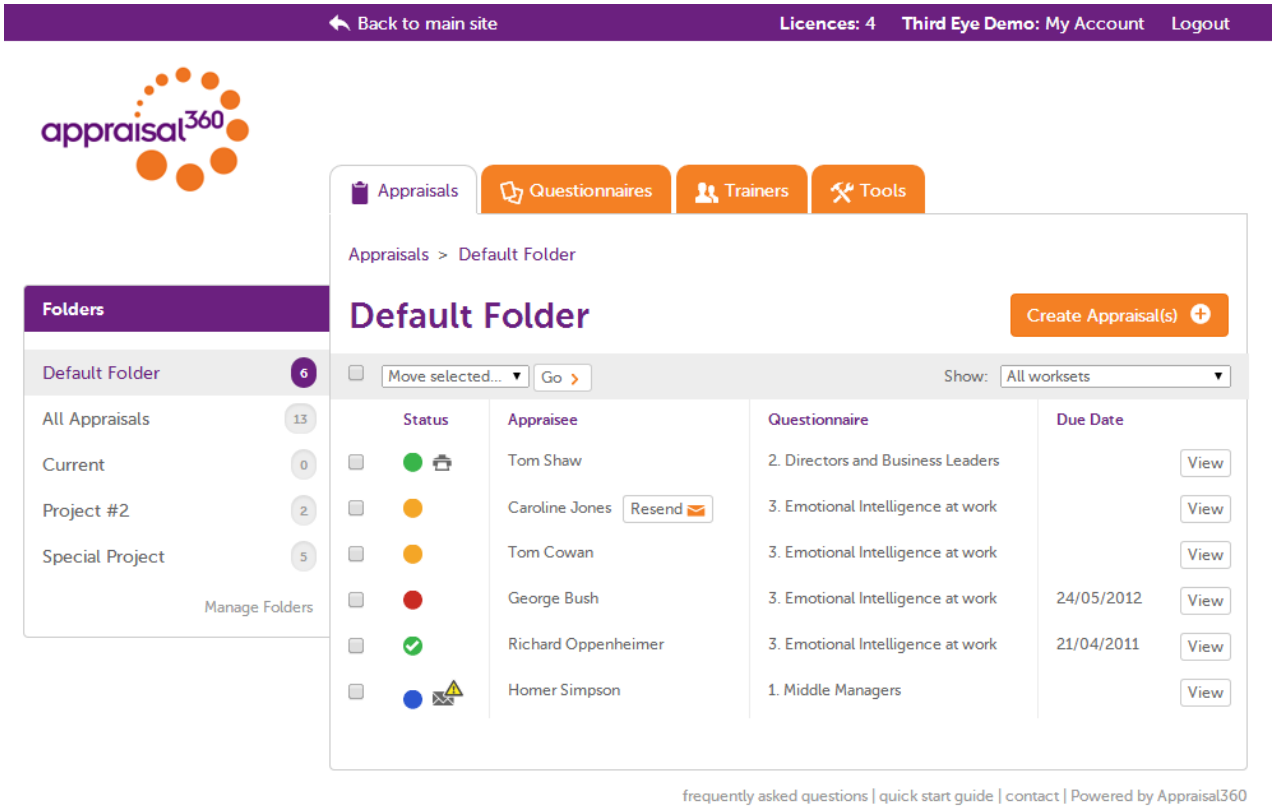
Before you can use Appraisal360 you will need to sign up for a trainer's account. Follow the trainer's account signup link http://www.appraisal360.co.uk/register_trainer from the Instant360 page – and then fill out your details in the registration page. When you save the form you will be sent an email 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. This is the most common reason for emails not being received.

If you think you may have entered your email address incorrectly then contact us and we will fix it and resend the email to you.

Trainer Control Panel (TCP)

The trainer control panel is the screen you land on when you first login.



The Trainer Control Panel (TCP)

All the main functions of managing your 360 projects are performed from here. It allows you to:

- Manage your inventory of unassigned licences
- See at a glance how your clients are progressing
- Drill down to each individual workset to check details, send reminders and access reports
- Organise your worksets into folders
- Purchase more worksets using the online shop.

You can return to the TCP at any time by clicking the <Appraisals> tab on your screen.

Purchasing licences

If you have no unused licences in your account you can click the <licences> link at the top of the screen and you will be taken to the online shop where you can purchase as many licenses as you need and pay either by card or request an invoice for offline payment.

Understanding the Trainer Control Panel (TCP)

Once you have assigned a licence to an appraisee it will appear on your control panel. A red/amber/green indicator tells you at a glance whether the appraisee has started the process, the process is in progress or the report is completed. Hovering over the coloured indicator displays a tooltip showing a quick summary of the status without having to click into each one.

A blue indicator next to the workset tells you that there is a problem that needs attention – normally a bounced email. Select <resend> and you will be able to edit the address before resending.

If the appraisee has not yet activated his or her account then there will be a <resend> button next to their name. This will disappear once the appraisee has logged in for the first time.

When the report is ready a printer icon will appear next to the green indicator. Click it to generate the report, or you can click into the Workset Control Panel and click the button there.

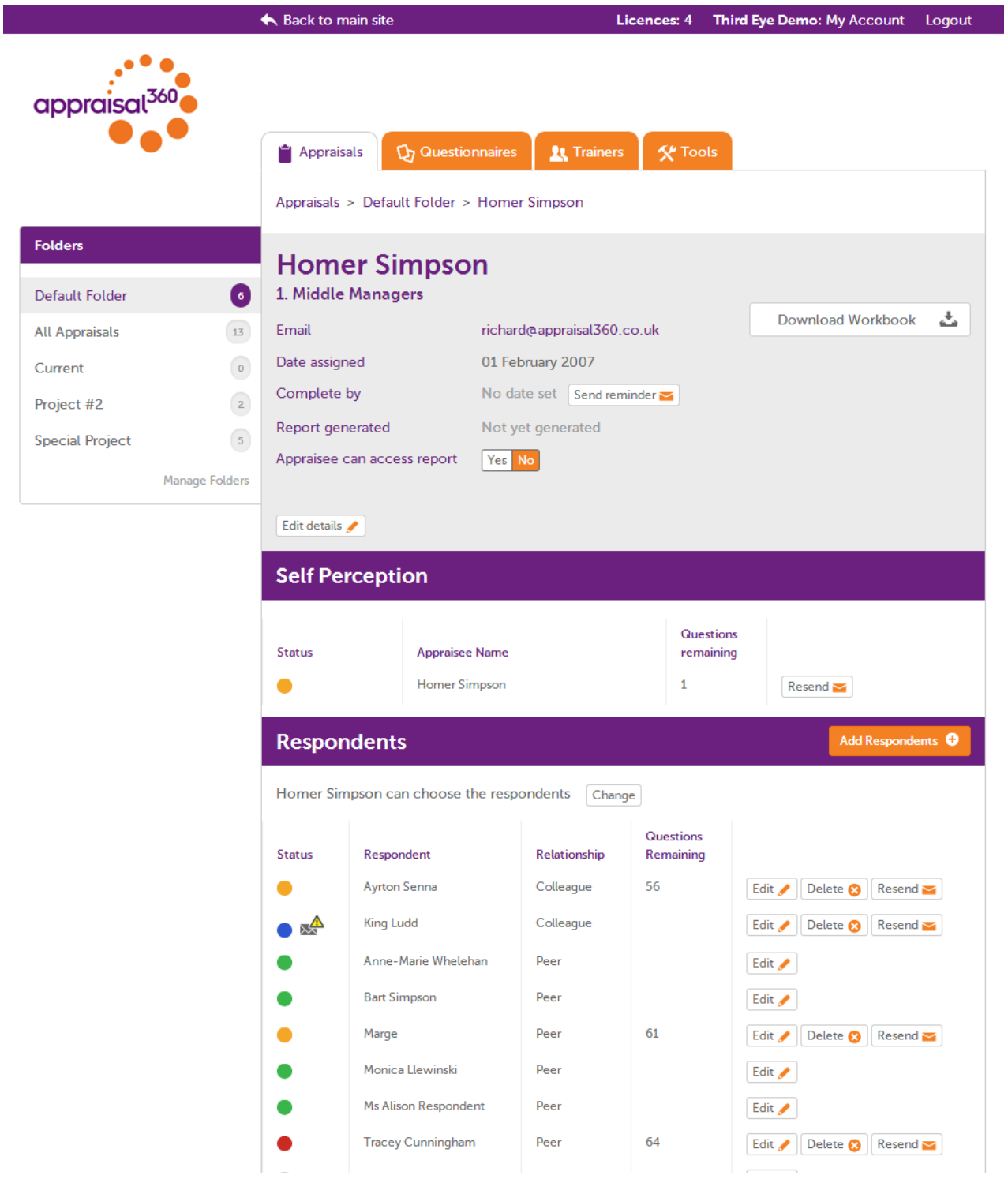
A green icon with a tick indicates that the report has already been downloaded and cannot be changed further.

And the Workset Control Panel (WCP)

Clicking the <view> button on the right brings up the Workset Control Panel (WCP), which allows you to check out the details. Here you can add respondents if the appraise is not doing it for themselves. You can see how far the respondents have got in filling out the feedback questionnaires and send reminders if necessary. Or delete respondents if you need to.

The <edit details> button allows you to change the options that you selected when you assigned the workset and also control the completion date and the sending of automated reminder emails.

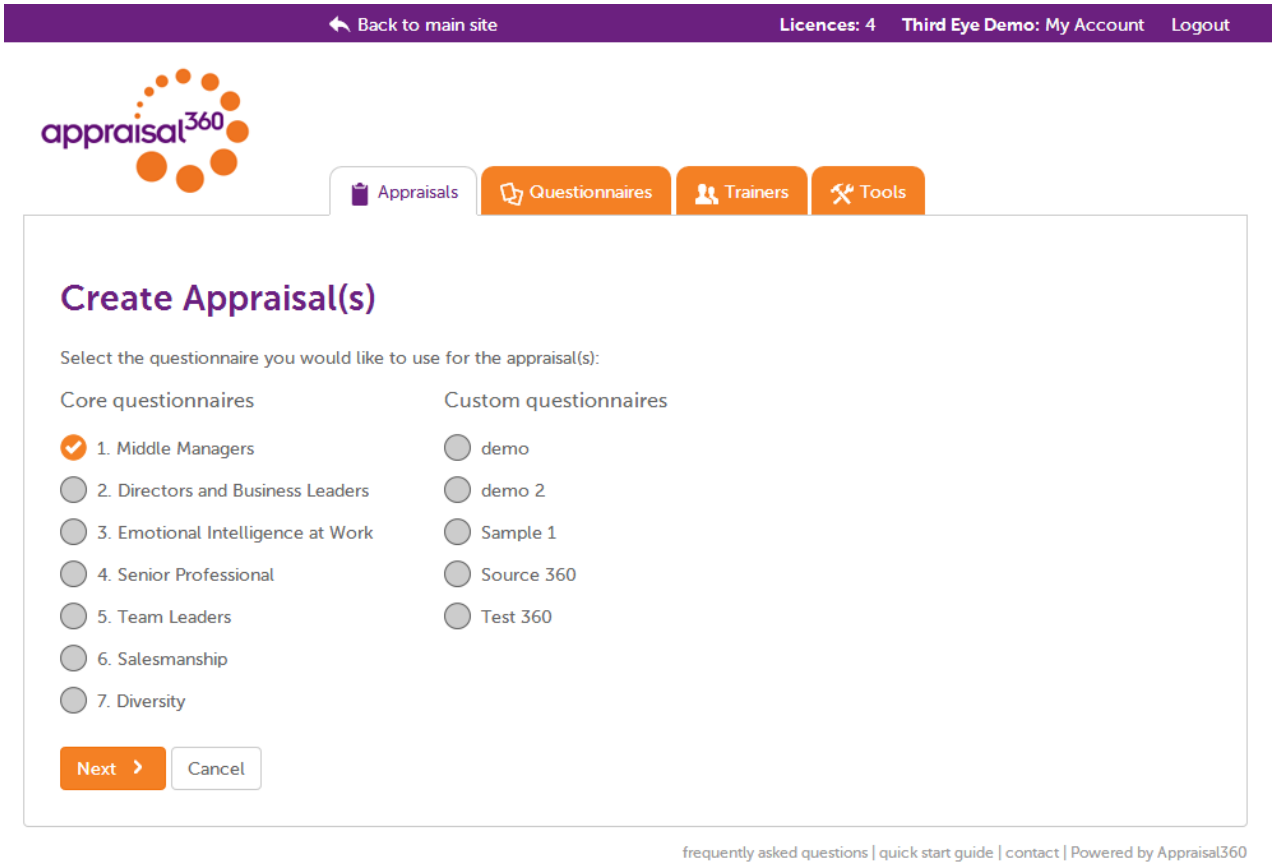
Once the report is ready you can download it and also control whether the appraisee can see it, using the slider control on the screen.



The Workset Control Panel (WCP)

Creating Appraisals

To start an appraisal for one of your appraisees start from the TCP and click on the <Create Appraisals> button. You will then see a new screen where you can select which questionnaire you want to use.

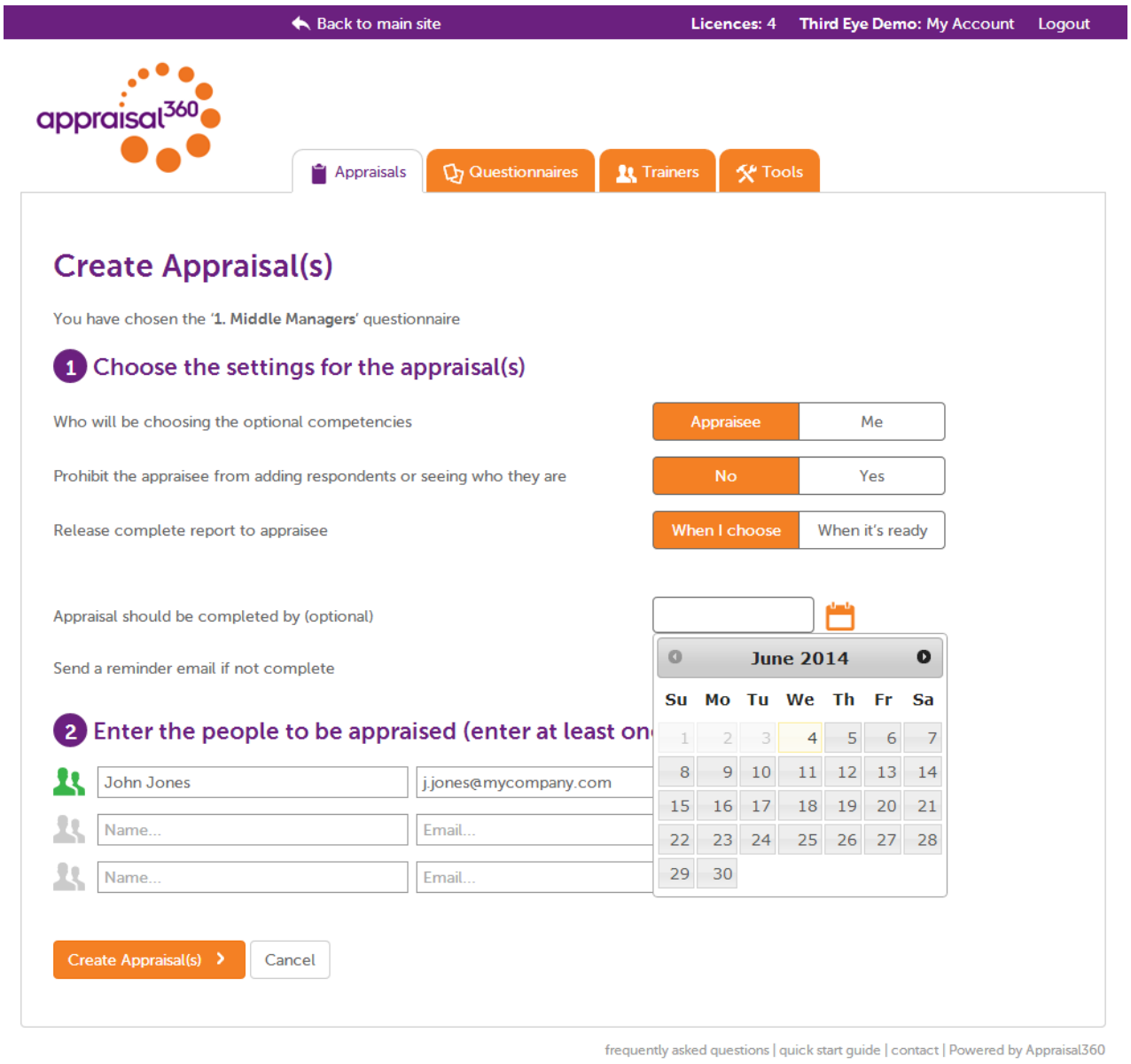


Select the questionnaire you want to use and click <next>.

By default your appraisee will be able to choose any optional competencies and add their own respondents, but you can choose at this stage to take control of any of these aspects:

- Selecting which competencies are to be included in the questionnaire if that questionnaire has optional competencies
- Selecting the respondents who will be giving feedback
- Choosing to see the completed feedback report before you release it to the appraisee.
- Select a completion date and choose whether you wish the system to send automated reminders.

Enter the names and email addresses of the appraisees and they will receive an email to say that their 360 is now ready for completion.

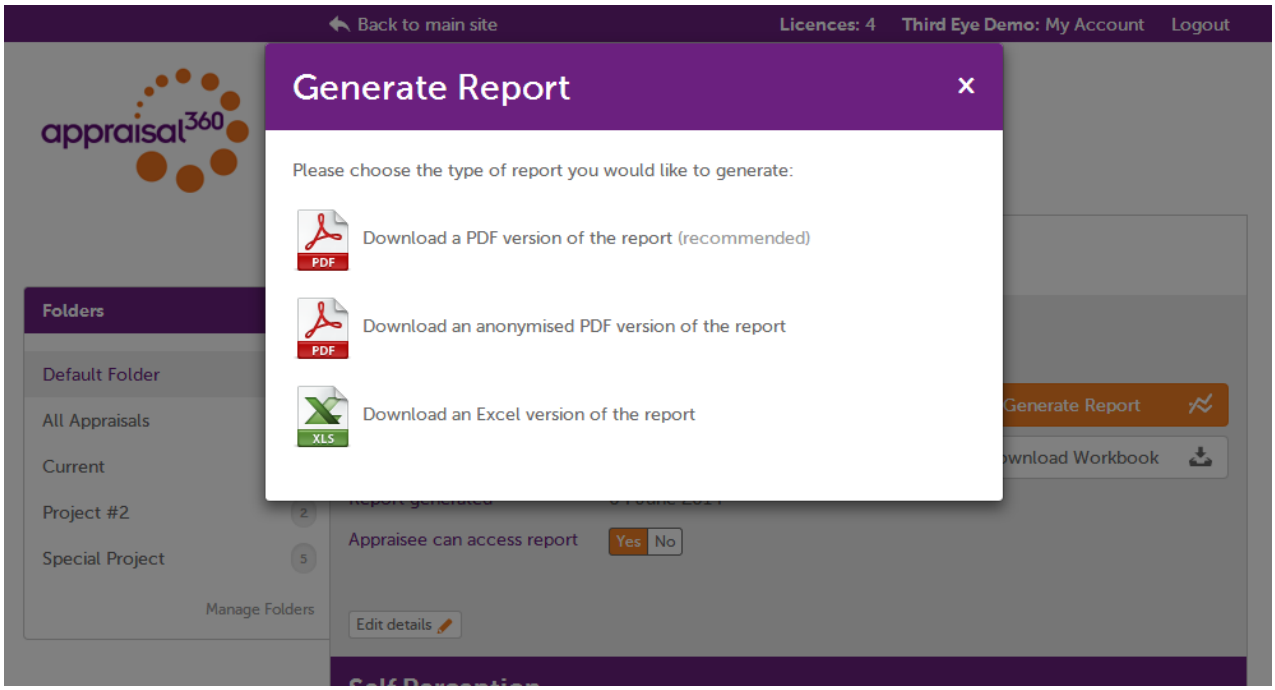


If you have decided to choose the competencies on the appraisee's behalf you will need to do this now before the process can go any further. Select the competencies you want to include and follow the on-screen instructions. It is important that you do this immediately or you will not be able to complete the assignment of the workset.

You can cancel an appraisal as long as it has not been started. Click into it on the control panel and your will see <Cancel Appraisal> if that is still an option.

Downloading reports

As soon as a report is ready the status indicator on the TCP will turn green and a small printer icon will appear next to it. Also a new button will appear in the Workset Control Panel. Clicking either of these will allow you to download the report.



We recommend that you use the workbook that you can download from the WCP or from the website at www.appraisal360.co.uk/downloads to help you examine the report and interpret the results and inform the mentoring session if you are planning to have one.

The first part of the report shows a summary of the competencies in the questionnaire and how overall the self-perception compares to the scores you got through feedback. The highest-scoring competency (based on feedback scores) is shown at the top and the lowest scoring is at the bottom.

In the second part of the report each competency is broken down into its component questions, showing the self-perception scores and how the respondent ratings. If you chose to allocate relationships to the respondents (e.g. boss, peer, junior) when you assigned them, these will be indicated by the different colours in the report figures. The first figure in the individual feedback scores always represents the same person, the next one the second, and so on, so that you can see if one person consistently scored you high/low or whatever. The order is randomly generated and bears no resemblance to the order they were entered into the system.

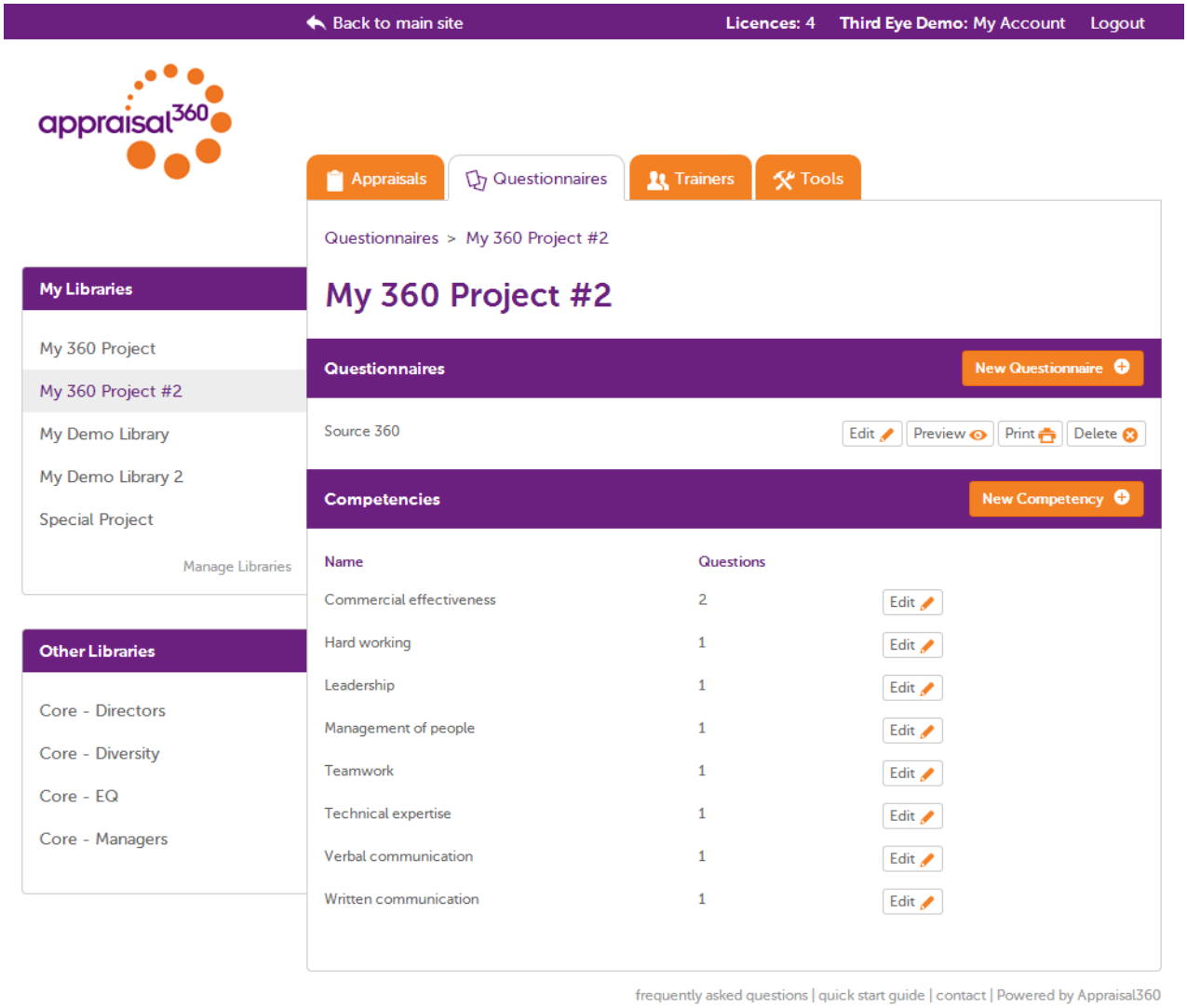
If the questionnaire included some free text questions, these will be shown at the end of the report.

Building Bespoke Questionnaires (optional)

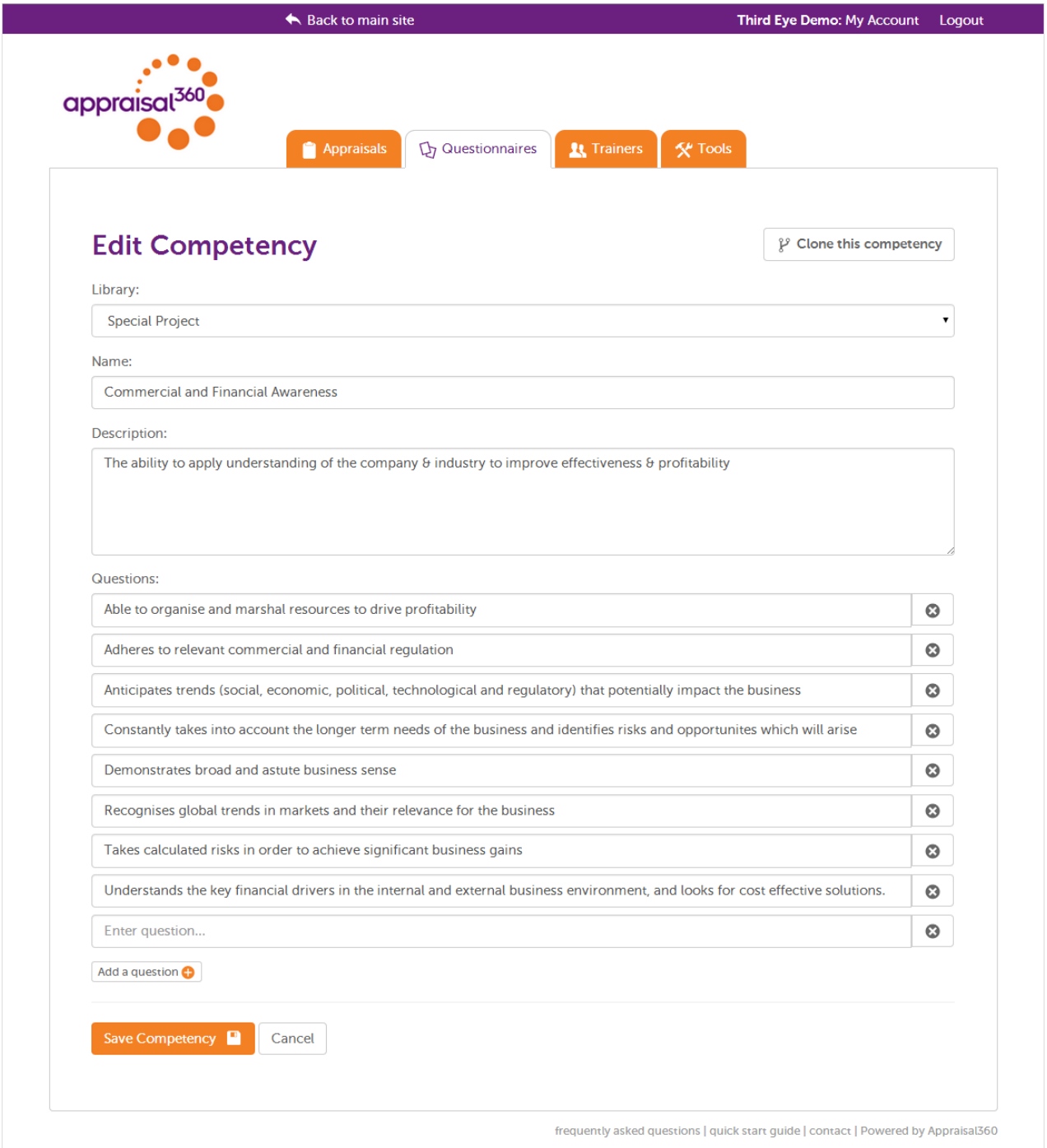
If you have your own questionnaire or competency framework which you wish to use instead of using one of our standard ones, then this will be shown in the list of available questionnaires when you assign the workset.

To load custom questionnaires onto the system you can either a) use our Competency Profiler Tool to create them yourself, or b) we can upload them onto the system for you. Either way you can contact us to discuss your options.

The Competency Profiler allows you to create your own libraries of competencies, build your own competency definitions and create questionnaires. Check out the following screenshots to see how.

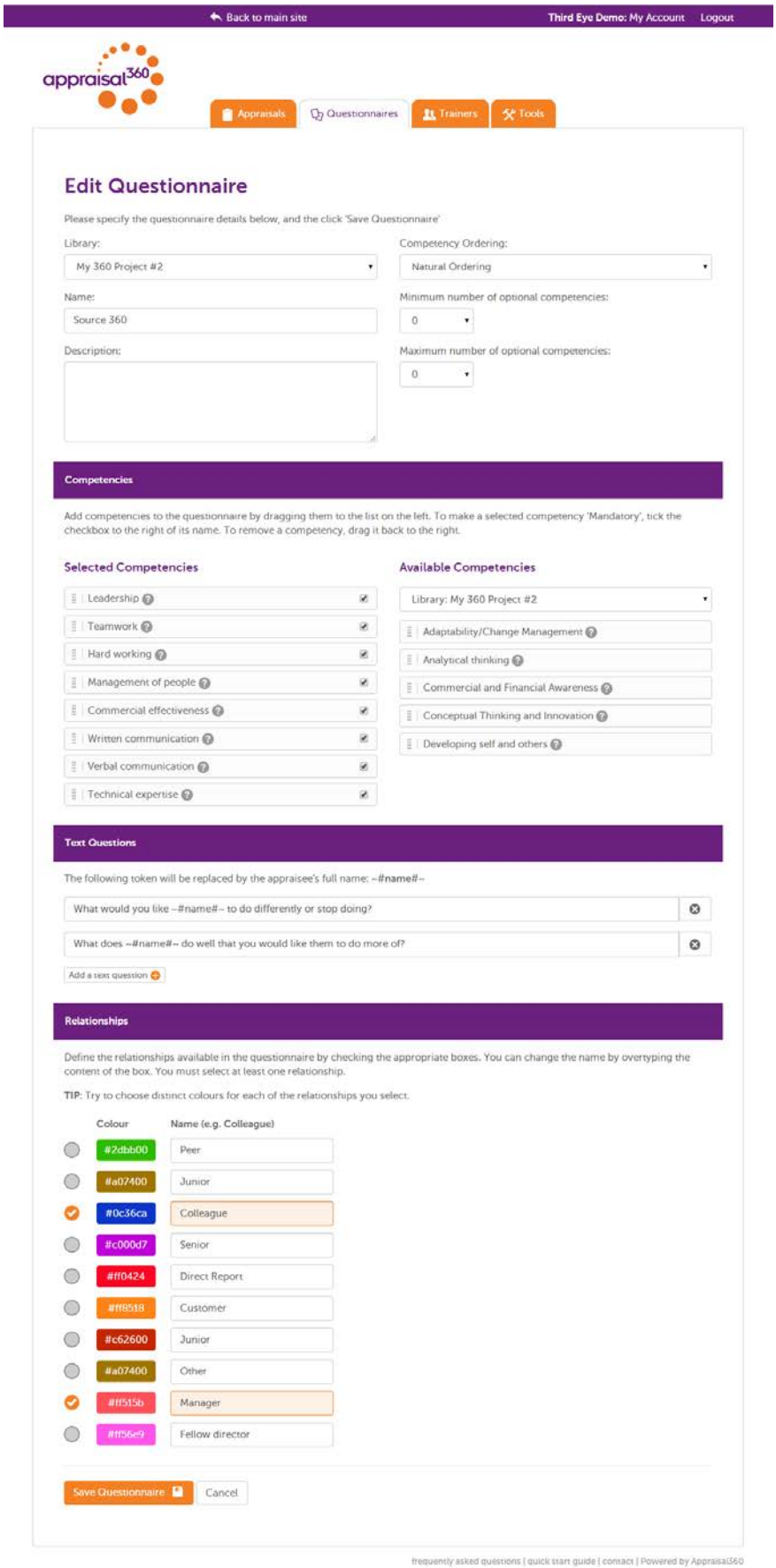


Competency Libraries



Competency Editor

Questionnaire Editor



Doing my own 360

Your 360 appraisal will start when you receive an automated email from Appraisal360 informing you that you have been assigned a workset by your trainer or manager. You will need to follow the instructions in this email:

- Click the link in the email to activate your account
- Create a username and password so that you can login to the system when you need to
- Save these details and then login.

Once you have logged in you will see your Appraisee Control Panel and your new workset will be listed. Clicking the <start> link to the right of the screen will take you to the Workset Control Panel. You will now need to do three things:

- Select your competencies (if your trainer has not already done this for you)
- Select your respondents (if your trainer has not already done this for you)
- Complete your self-perception questionnaire.

Workset Control Panel

The control panel is where you control the 360 process. It is here that you:

- Choose who will be giving you feedback (your respondents)
- Complete your self-perception
- Monitor progress and send reminders
- View your report when it is ready
- Download the workbook which accompanies your workset.

Choosing Your Competencies

Your workset will probably come with a number of mandatory pre-set competencies – these are groups of behaviours which are seen as vital for anyone in your position. But you may also have the chance to choose a number of additional optional competencies. The system will tell you how many you can choose. You may wish to discuss your choice with your trainer/manager. Check the boxes next to the optional competencies you want and then click the <submit> button at the bottom of the screen to create the questionnaires.

Now you are ready to complete your self-perception and invite your chosen respondents to fill in your online questionnaire.

Self-Perception

Fill in your own self-perception by clicking the button on the control panel. You can save your work at any time and come back later if you wish. We recommend that you fill in the questionnaire fairly quickly without dwelling on each question too much, as your initial response is normally the right one and you must answer every question, including the free text questions at the end of the questionnaire. You will always have a “Don’t know” option if you feel unable to answer any given question and it is sufficient to enter just a single character into a free text question if you have nothing further to say.

Invite Respondents

In your control panel you have a button to <Add respondents>: click on <add> and enter the name and email addresses of your respondents – and select the relationships you have with the

respondents from the pull-down menu. Click <send emails> and your respondents will each receive an email asking them to fill in a respondent questionnaire.

You can add as many respondents as you wish but for best results we recommend about 6-10.

You can check the progress of your respondents at any time by looking at the coloured progress indicators next to each one and send reminders, <re-send email> or <delete> respondents at will.

If a respondent has a blue tag next to their name then it means that the email has bounced. Click on the <resend email> button and check the email address before resending. The system will not allow you to resend to an address which has already bounced.

If a respondent does not receive their email, check that the email address is correct by clicking the <re-send email> link and checking the address. If the address is correct, then ask him or her to check the junk email folder.

Viewing Your Report

Once the last respondent has completed you will be able to view your report by clicking the <Generate report> link in your control panel. Your trainer may be withholding the report until he or she is ready to discuss it with you.

Responding to a request for feedback

Your request for feedback will come in the form of an automated email. Read the email carefully and click the <questionnaire> link to access the online questionnaire.

You do not need to login to the system to complete a respondent questionnaire.

You must answer every question, including any free text questions – although a single character will suffice if you have nothing further to say.

We recommend that you fill in the questionnaire fairly quickly without dwelling on each question too much, as your initial response is normally the right one.

You can save your work at any time but you must keep the email or you will not be able to access it again. If you lose it, then you can ask for it to be resent.

Once the 360 is completed it will be locked and you cannot access it again. However, in the event of a serious mistake we can unlock it for you.

Using Appraisal360 independently

You can use Appraisal360 independently of any manager or trainer if you wish. You will be able to choose from one of our standard range of competency frameworks and complete the process in much the same way as described in the section “Doing my own 360” and access your report when it is ready.

However, you will need to pay before you can access your full feedback report and the number of respondents you can assign will be restricted until your payment is received.

Choosing your product

When you are ready to start, click the <Try before you buy> link and follow the on-screen instructions. Click the <Learn more> link to find what is included in each workset or consult our product guide.

Signup

Once you have finished your self-perception questionnaire you will be asked to register and we will send you a confirmation email which you must act on before you can login to your account to assign your respondents.

Purchasing

To remove the restrictions on your free trial account you can:

a) Pay online with your credit card
b) Contact us to arrange payment and upgrade

You should now follow the instructions as per the section “Doing my own 360”

Definitions

Appraisee or Candidate	The person who is the subject of the 360 assessment and whom the report is about.
Behaviour	Something that you do that is part of a particular competency. For example: “Listens to and considers others’ views” is part of the Communication competency.
Competency	A particular skill area that has been identified as important to the job you do. For example, Leadership or Communication.
Feedback	The opinions and perceptions of the respondents.
Report	The output from the process comprising the combined feedback from all the respondents plus the appraisee’s self-perception.
Respondent	The people who have been asked to give their feedback on the appraisee.
Self-Perception	The opinions that the appraisee gives of him or herself.
Trainer	The person who is responsible for managing the process of allocation, progressing and completion of 360s for a number of appraisees.
Workset	A user license which covers all the questionnaires, the report and the workbook for one appraise. One workset will deliver a report for one appraisee.