

1.

Open 360 | Assessors Information

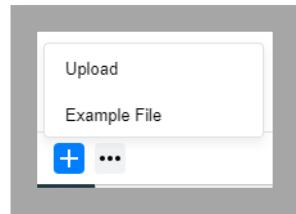
FinxS Open 360 allows you to add assessors to an Open 360 Access Code/Project quickly and easily. Below is a sample of the Excel spreadsheet the system requires for uploading assessors:

A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Last name	First name	Email	Organization	Opening date	Reminder date	Closing date	Group name	Last name	First name	Email	Password	Completed
2													
3													
4													
5													
6													
7													

- **To download the assessors' spreadsheet**, click on the tab along the top of the project information called "People".

The screenshot shows the 'People' tab selected in the top navigation bar. Below the tabs, there is a preview section with 'Invitation email' selected. A blue button labeled 'Open 360 Sample Data for Clients' is visible.

- In the bottom left corner of the screen, **click on the '... (three dots)** and then click "Example file".
- An Excel spreadsheet that looks like the one above will be downloaded.
- Open it and **fill in the cells beneath each of the headings given with the stipulated details** (see next steps) and then save it in Excel 97-2003 Workbook format only. (This is the only format that will work in the system).
- See an example on page 20 of **how the spreadsheet must be completed**. There are no limits to assessor groups (peers, managers, direct reports, etc.) or assessors (individuals). For every person being assessed (columns A + B), you must also

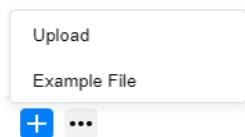


add the name of the person assessing them (columns J + K). This will mean entering the assessee's details several times, each time matched with a different assessor (and, of course, the same assessors may come up multiple times as well).

- **Every assessor must have their own email address** (i.e. not a general one, like 'info@... .com'). If you have assessors who don't have an email address, please contact HR Profiling for advice. When the system sends out the invitations, each assessor must enter an email address along with the access code to complete the questionnaire.
- If you have already entered an "Opening date", "Reminder date" and "Closing date" when setting up the Project/Access Code you do not need to complete these columns. Just leave them empty.
- **If participants are going to have to enter passwords** to complete the online questionnaire, please enter a password in column M that includes letters (capital and lower case) and numbers.
 - a. If you are happy for assessors to simply use their email address when completing the questionnaire, delete the passwords column. (At HRPS, we don't use passwords).
 - b. However, if you have set up the access code/project to use passwords, you must add these to the spreadsheet.

	Last name	First name	Email	Organization	Opening date	Reminder date	Closing date	Group name	Last name	First name	Email	Completed
1	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Self	Luton	Lucy	lucy@extendeddisc.com	
2	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Direct Reports	Black	Fred	fred.black@pretend.com	
3	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Direct Reports	White	Jack	jack.white@pretend.com	
4	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Direct Reports	Smith	Jill	jill.smith@pretend.com	
5	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Direct Reports	Jones	Mark	mark.jones@pretend.com	
6	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Direct Reports	Peters	John	john.peters@pretend.com	
7	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Direct Reports	Norris	Jane	jane.norris@pretend.com	
8	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Managers	Anderson	Joy	joy.anderson@pretend.com	
9	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Managers	Jackson	Athur	athur.jackson@pretend.com	
10	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Managers	Cannon	Jenny	jenny.cannon@pretend.com	
11	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Managers	Green	Anne	anne.green@pretend.com	
12	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Peers	Wood	Peter	peter.wood@pretend.com	
13	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Peers	Dalton	Tim	tim.dalton@pretend.com	
14	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Peers	Turner	Tayna	tanya.turner@pretend.com	
15	Luton	Lucy	lucy@extendeddisc.com	Global Mining				Self	Cline	Kevin	kevin@extendeddisc.com	
16	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Direct Reports	Black	Fred	fred.black@pretend.com	
17	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Direct Reports	White	Jack	jack.white@pretend.com	
18	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Direct Reports	Smith	Jill	jill.smith@pretend.com	
19	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Direct Reports	Jones	Mark	mark.jones@pretend.com	
20	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Direct Reports	Peters	John	john.peters@pretend.com	
21	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Direct Reports	Norris	Jane	jane.norris@pretend.com	
22	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Direct Reports	Anderson	Joy	joy.anderson@pretend.com	
23	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Managers	Jackson	Athur	athur.jackson@pretend.com	
24	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Managers	Cannon	Jenny	jenny.cannon@pretend.com	
25	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Managers	Green	Anne	anne.green@pretend.com	
26	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Managers	Wood	Peter	peter.wood@pretend.com	
27	Cline	Kevin	kevin@extendeddisc.com	Global Mining				Self	Powers	Marcus	marcus@extendeddisc.com	
28	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Direct Reports	Black	Fred	fred.black@pretend.com	
29	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Direct Reports	White	Jack	jack.white@pretend.com	
30	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Direct Reports	Smith	Jill	jill.smith@pretend.com	
31	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Direct Reports	Jones	Mark	mark.jones@pretend.com	
32	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Direct Reports	Peters	John	john.peters@pretend.com	
33	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Direct Reports	Norris	Jane	jane.norris@pretend.com	
34	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Direct Reports	Anderson	Joy	joy.anderson@pretend.com	
35	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Managers	Jackson	Athur	athur.jackson@pretend.com	
36	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Managers	Cannon	Jenny	jenny.cannon@pretend.com	
37	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Managers	Green	Anne	anne.green@pretend.com	
38	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Managers	Wood	Peter	peter.wood@pretend.com	
39	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Peers	Moore	Derek	derek.moore@pretend.com	
40	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Peers	Dalton	Tim	tim.dalton@pretend.com	
41	Powers	Marcus	marcus@extendeddisc.com	Global Mining				Peers	Turner	Tayna	tanya.turner@pretend.com	
42	Powers	Marcus	marcus@extendeddisc.com	Global Mining								
43												

- Once the Excel spreadsheet is complete and saved in Excel 97-2003 Workbook format, return to the bottom left corner of the 'People' screen, select the "... (three dots)" again and click "upload".



- o The system will ask you to find the spreadsheet and open it.
- o FinxS will upload the spreadsheet into the project, ready for invitations to be sent out to participants.
- o If there is an error in the spreadsheet, FinxS will advise what row the error appears in. It will not upload the spreadsheet until all errors have been corrected.
- o Fix any errors and upload again.