

Surveys I Completing Participant Information

FinxS Survey allows you to add assessors to a Survey 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
Group name	Group full name	Last name	First name	Email	Organization	Password
ACC	Accounts	Sample1	Sam1	Sam1Sample1@aarings.com	AA Rings	
ACC	Accounts	Sample2	Sam2	Sam2Sample2@aarings.com	AA Rings	
ACC	Accounts	Sample3	Sam3	Sam3Sample3@aarings.com	AA Rings	
PCR	Procurement	Sample4	Sam4	Sam4Sample4@aarings.com	AA Rings	
PCR	Procurement	Sample5	Sam5	Sam5Sample5@aarings.com	AA Rings	
PCR	Procurement	Sample6	Sam6	Sam6Sample6@aarings.com	AA Rings	
PCR	Procurement	Sample7	Sam7	Sam7Sample7@aarings.com	AA Rings	
PCR	Procurement	Sample8	Sam8	Sam8Sample8@aarings.com	AA Rings	
CC	Client Care	Sample9	Sam9	Sam9Sample9@aarings.com	AA Rings	
CC	Client Care	Sample10	Sam10	Sam10Sample10@aarings.com	AA Rings	
CC	Client Care	Sample11	Sam11	Sam11Sample11@aarings.com	AA Rings	
CC	Client Care	Sample12	Sam12	Sam12Sample12@aarings.com	AA Rings	
HR	HR	Sample13	Sam13	Sam13Sample13@aarings.com	AA Rings	
HR	HR	Sample14	Sam14	Sam14Sample14@aarings.com	AA Rings	
HR	HR	Sample15	Sam15	Sam15Sample15@aarings.com	AA Rings	
HR	HR	Sample16	Sam16	Sam16Sample16@aarings.com	AA Rings	
HR	HR	Sample17	Sam17	Sam17Sample17@aarings.com	AA Rings	

- **To download the participants' spreadsheet** click on the tab along the top called "Response Groups". Ensure the name of the access code is highlighted on the left.



- 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).

- We recommend **deleting any question columns** as these are not necessary for the Survey. If you would like more information about this, please contact HR Profiling Solutions.
- Save the completed spreadsheet in Excel 97-2003 Workbook format only. (This is the only format that will work in the system).
- There are no limits to respondent groups or participants and you must enter the name of each individual respondent in each respondent group.
- **Every assessor/respondent 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 participants are going to have to enter passwords** to complete the online questionnaire, you can leave the password cell empty. The system will automatically create its own passwords.

- **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".
 - The system will ask you to find the spreadsheet and open it.
 - FinxS will upload the spreadsheet into the project, ready for invitations to be sent out to participants.
 - 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.
 - Fix any errors and upload again.

