Open 360 Training Summary Manual

Watch this video on how to use this Powerpoint document to set-up a 360 review on the FinxS system.

360 Set-up Process

Step 1:
Create/Edit Questionnaire

Step 2:
Create Assessor List

Step 3:
Create an Open 360 Project & Access Code

Step 4:
Send Out Invites/Reminder Invites

Step 5:
Download & Print Results

Helpful Hints Before Commencement of 360 Reviews

1. We recommend not putting too many questions into the questionnaire. People disengage if the answering process is too long.

2. Ensure there are a minimum of 5 reviewers for a candidate to be assessed.

3. Ensure participants/reviewers/assessors are expecting the invitation email from your company to complete the Open 360 questionnaire. This way people will not delete the invites, thinking they are spam.

4. We recommend that the answering process is anonymous to encourage reviewers to answer openly and honestly.

5. The following email addresses, used by our FinxS system, must be whitelisted by the participants' company to ensure emails are not blocked or sent directly to spam:
   - System.admin@finxs.com
   - foward@finxs.com

Watch Video of the Answering Process

Step 1:
Create/Clone Questionnaire

[Download Sample Questionnaires]

[Download Questionnaire Instructions Template]

Video Links

(Please ensure you are logged in to the VIP section to view the videos.)

[Creating / Editing a Questionnaire]

[Cloning Questionnaire]

Electronic Manual

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Helpful Hints

- Select only one answering scale question type to use in your Open 360 questionnaire: Open scale or Likert scale.
- Ensure the answering scale is entered correctly, i.e. most favourable at the top and least favourable at the bottom.
- Instructions for the answering process must be included. Download the template above to customise.
- Questions should not be double-barrelled. i.e. "This person communicates clearly and with purpose". This constitutes two questions.

Trouble-Shooting

- Keep the questionnaire locked until finalized.
- Make sure the questionnaire is unlocked once completed and ready to be sent out.

Step 2:
Create a list of assessors

Download Sample Participant Worksheet

Video Links

(Please ensure you are logged in to the VIP section to view the videos.)

How to Complete Participant Worksheet

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Helpful Hints

- Every participant must have their own email address.
- Make sure columns are completed correctly on the Excel sheet.
- Do not use formulas in the Excel sheet as this will prevent it uploading.
- The participants spreadsheet must be saved in .xlsx format. This is the only Excel format that FinxS can use.

Trouble-Shooting

- Remove all unusual punctuation on the Excel sheet.
- Ensure there is no "blank" space after the email addresses.
- Ensure that only the details of the person being assessed are in the **first 4 columns and that they're duplicated exactly.**
- Make sure the assessed person's details are also added to the **last 4** columns. The group name should be **"Self"**.

Step 3:
Create an Open 360 Project & Access Code

This step entails setting the parameters of the Open 360:

- The Questionnaire (see Step 1) needs to be attached to the Project.
- The Assessor List (see Step 2) needs to be uploaded to the Project.
- Create an Access Code.
- Personalise the Invitation Emails.

Video Links

(Please ensure you are logged in to the VIP section to view the videos.)

How to create an Open 360 Project

How to upload the list of assessors

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Helpful Hints

- Determine the following:
  - Who will administer the Open 360?
  - What are the Opening and Closing Dates of the Open 360?
  - When will you send Reminder emails?
  - Can assessors return to previous questions or not?
  - Are you going to use passwords?
  - Do you want to include a 'Thank you' message?

Trouble-Shooting

- The Opening Date should be put as the **day before** the invitations are sent. This will ensure the project is "Active".
- Ensure the questionnaire is unlocked in order to attach it to the project.

Step 4:
Send Out Invites/Reminder Invites

Video Links

(Please ensure you are logged in to the VIP section to view the videos.)

How to send out invites

How to delete assessors

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This step includes:

- **Adding or deleting assessors during the Open 360 process.**
- **Extending the Closing Date**
- **How to review the participant answering status**

Helpful Hints

- The **Questionnaire** cannot be edited once the assessors have started to complete the Open 360.
- Assessors/respondents can be added or deleted during the process.

Trouble-Shooting

- **Extending the Closing Date:**

It is important to note that this needs to be updated in **two places:**

1. Update it under Closing Date in the **"General"** tab.
2. Update it in the **"People"** tab by clicking on the Assessors' names.

- **If adding assessors after the invitations have been sent, remember to send an invitation to them as well.**

Step 5:
Download & Print Results

Video Links

(Please ensure you are logged in to the VIP section to view the videos.)

How to view & print results

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Interpreting Results and Reports

Download Consultants Guide

Helpful Hints

- "Play" around with the results until you find a format that is suitable.
- Results can be viewed in tables and graphs.
- **Graphs available:**
  - Basic Bar
  - Floating Bar
  - Stacked Bar
  - Basic Column
  - Floating Column
  - Stacked Column
  - Pie Chart
  - Spider Web
  - Line Chart

Trouble-Shooting

When accessing the results, always ensure you click on the relevant Likert or Open Scale Tab to view the results.