

360 Survey Setup Checklist



This is a checklist of the items needed/decisions to be made at each step of the Survey setup process. This checklist generally covers the process of setting up all surveys, with some minor differences for R.A.N.D. Career Profile and Team-Centric Surveys. Separate instructions are also available for Team-Centric Setup.

NOTE: that the specific options you see will be dependent on your level of access to the system.

You can use this page to document the steps completed for a group. Details of each step start on page 2.

☐

Step 1: Set up Organization (if this is first Action - Virtual Sort or Survey - for the Organization)

☐

Step 2: Set up and Save Survey Group Group name: _____

☐

Step 3: Assign Practices

☐

Step 4: Enter Learner(s) (or Candidates for R.A.N.D. Career Profile or Team for Team-Centric)

☐

Step 5: Enter Rater(s)

☐

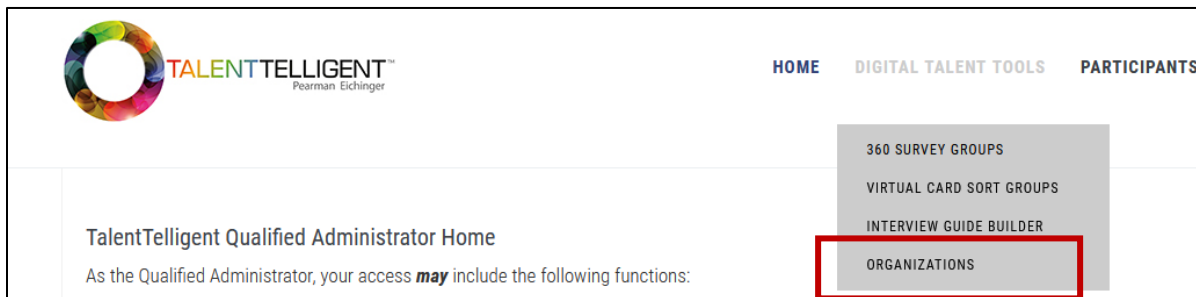
Step 6: Send Email Invitations

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Step 1: Set up Organization (This step is needed once per organization. Once an organization is set up for any action - Virtual Sort or Survey - you can go directly to Step 2 for subsequent groups attached to the same organization.)

From your QA System Home Page, go to Digital Talent Tools > Organizations



You will see a grid of any existing Organizations you have already entered. To add a new Organization, click 'Create Organization' Button.

ADD ORGANIZATION

* Required Fields.

* Organization Name

* Organization Address

* Organization City

* Organization State

* Organization Zip

* Contact Name

* Contact Email

* Contact Phone

* Organization Size

Integers only please

* Organization Economic Sector

Select

* Organization Type

Select

Organization Logo

Browse...

No file selected.

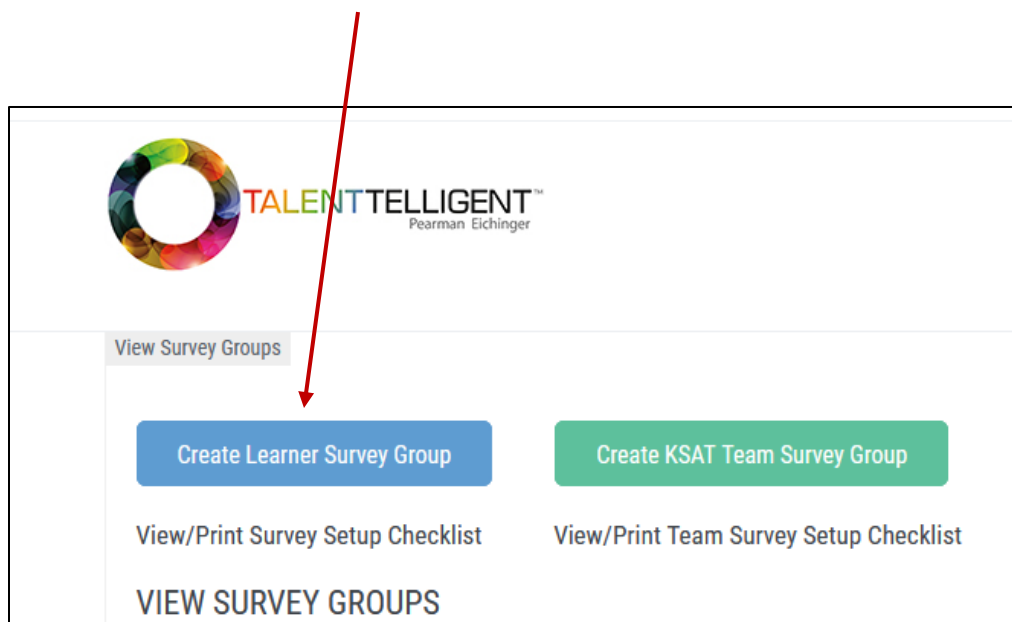
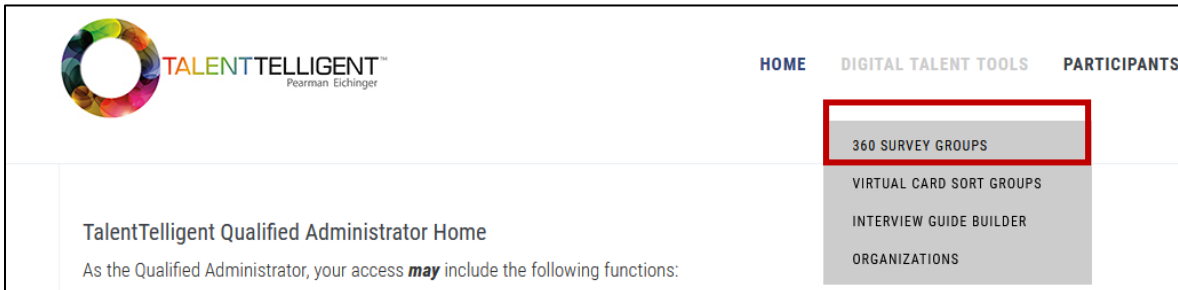
SAVE ORGANIZATION

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Note that the organization logo will display in invitation emails and on the surveys. If no logo is uploaded, the TalentTelligent Logo will display.

Step 2: Set up Survey Group: (Digital Talent Tools > 360 Survey Groups)



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Add New Group

ADD NEW GROUP

View/Print Survey Setup Checklist

- At the time you set up new groups, you will decide who will manage the raters and whether the learner will take their own survey.
- Learners and raters can be added individually or via a file upload.
- If learners are to manage their raters and/or take their own survey, they will receive instructions in an email.
- You will control and initiate the invitations to be sent to participants. This can be done in stages.
- Reports are available via the Manage Groups Area.

* Required Field

* Group Name

* Choose Organization

Select

Click to add new organization

* Which Survey

Select ...

* Close Date

Auto Reminder Date

Number of days before closing date to send final reminder.

0

Can Learner Add Raters?

☒ YES ☐ NO

If NO, the Qualified Administrator will need to add raters.

Can Learner Take Survey?

☒ YES ☐ NO

Note that these messages will be included in ALL emails sent to the participants: Initial Invite, Reminders, and Re-sent. You can edit or remove these messages for various phases of communication as desired.

Optional custom Email Message to include in Raters Email.

Click to **view Welcome Email** sent to raters and location of this custom message.

Survey Email Invitation Option (?)

Send a Survey Link in Invitation Email

Learn More

ADD GROUP

Required (*) and Optional Items:

- ***Survey Group Name** (customizable, a name with meaning to the process)
- ***Organization** (Choose from previous setup)
- ***Which Survey** (KSAL, KSAM, KSAI, KSAP-Career Development, R.A.N.D. Career Profile and (Sort or Ratings)

The Sort version allows the participants to pull sort cards into sorting piles. The Ratings version allows the participants to make radio button selections.

Only if you choose R.A.N.D. you will be asked whether to include 3 framing questions at the end of the survey. These 3 questions ask about Career Mobility, Culture Alignment, and Leadership Style Alignment.

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If you choose Sort version:

***Number of Sort Columns** (3 or 5). This is the number of sort piles the participants can sort the items into.

***Sorting Type** (Relative or Absolute)

Relative Sort (even number of Practices in each pile) The Practices in this pile of a sort are all less than all of the rest in the higher piles. Practices in this pile are not done as well as all of the others in the higher piles. There will be differences (ranked within a pile) within the high pile because you were directed to put an even number of Practices in each pile.

Absolute Sort (any number of Practices in any pile) The Practices in this pile of a sort are all less than all of the rest in the higher piles. Practices in this pile are not done as well as all of the others in the higher piles. Since you could put any number of Practices in this pile, there may be very few or a lot.

- ***Close Date** – The date beyond which the survey cannot be completed.
- **Auto Reminder Date** – Optional, to choose a date to send a reminder automatically.
- **Number of days before closing date to auto-send final reminder** – Optional.
- ***Can Learner Add Raters Y/N** – indicates whether learner can add their own raters. Not an option for R.A.N.D. Career Profile
- ***Can Learner Take Survey Y/N** – Can Learner take their own survey. Not an option for R.A.N.D. Career Profile. Note, do not enter the learner as their own rater. If they need to take the survey, answer Y here.
- **Optional custom Email Message to include in invitation to Learners and/or Raters.** These messages will be included in all emails sent from the system (re-send, reminders). These messages can be edited as needed.
- ***Survey Email Invitation Option** – 1. Send a survey link in invitation email: This option will send a link that will take the participant directly to the survey. 2. Send survey code in invitation email: This option will send a URL and a code. The participant will go to the URL and enter or copy/paste the code. This option is available to avoid active links that may cause problems being delivered by some company security systems.

Once the group is saved, all other operations related to managing the process will be via the Groups Grid View.
(Digital Talent Tools > 360 Survey Groups)

Step 3: Assign Practices. After the group details are saved, click the 'Assign Practices' in the group grid.

This allows you to select the practices that will be included in the survey. For R.A.N.D. Career Profile, you are required to use all the practices.

Several other functions are available in this grid.

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Pearman Eichinger

VIEW SURVEY GROUPS

Show entries

Search:

Group Name	Survey	Close Date		Report(s) Ready	Total # of Learners / Raters (Not Invited)
	R.A.N.D. Career Profile - Ratings	11-13-2025	Assign Practices	N	0 / 0 (0)
	Effective Leader Survey (KSAL) - Ratings	01-01-2022	Manage Learners & Reports	Y	5 / 16 (0)

Assign Practices

Edit Group. Depending on the status of the group, changes can be made to the group here.

After Assigning Practices. Manage Learners and Raters. Access Reports here.

'Remind All' Sends reminder emails to all participants in a group that have NOT completed their survey.

Hover here to see any Custom Message attached to the group.

Step 4: Manage Learners & Reports. After Assigning Practices, Add Learners to the group.

Add/Manage Learners for Group: 1.r.0.0.ta.all.test

Survey: KSA 360: Effective Leader Survey (KSAL) - Ratings
Close Date: 01-01-2022

Purchase additional surveys here.

[CLICK TO PURCHASE SURVEYS](#)

You have 43 remaining survey(s) to assign.

Add Learners individually or upload a file

Add Learners two ways:

- Option 1: Upload a file [using our template](#)
- Option 2: Add a single Learner to the group. Note that you can do either or both operations to a group. If you upload a group then need to add additional Learners, you can do so.

[BULK UPLOAD LEARNERS USING A FILE](#) [ADD INDIVIDUAL LEARNER TO GROUP](#)

Enter Learners (or Candidates for Career Profile or Team for Team-Centric)

*Learner First Name

* Learner Last Name

* Learner Email

Learners can be entered one at a time or bulk upload via a .csv file.

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Note that in the case of R.A.N.D Career Profile, the email is used only for unique identification. The candidates never receive any communication from the system. In the case of Team-Centric, the Team is a grouping, allowing a survey to be performed on a Team rather than an individual.

Step 5: Edit/Manage Raters. After adding Learners, add raters that will complete a survey for that Learner.

All existing learners and raters have been invited previously.

[Edit Group](#) [PRINT GROUP REPORT](#)

First Name	Last Name	Self Survey Complete	Email	Raters Complete (Not Invited)	Profile/Raters	Invite Sent
[Redacted]	[Redacted]	N	[Redacted]	0 of 1 (0)	Edit/Manage Raters Re-Send Remind Delete	10-22-2020
[Redacted]	[Redacted]	Y	[Redacted]	0 of 0 (0)	REPORT Edit/Manage Raters	11-13-2020
[Redacted]	[Redacted]	N	[Redacted]	0 of 0 (0)	Edit/Manage Raters Re-Send Remind Delete	11-13-2020

Add/Edit/Manage Raters

Enter Raters. DO NOT enter the learner as a rater here. If the learner is to take a self-survey, that option should have been chosen when setting up the group.

- *Rater First Name
- * Rater Last Name
- * Rater Email
- *Rater Type

Raters can be entered one at a time or bulk upload via a .csv file.

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2.s.10-22.learnerF1 learnerL1 Profile

Name: [Redacted] Profile

Email: [Redacted]

Completed Survey? N

[Edit Learner](#)

Group Name: [Redacted]

Assigned Survey: KSA 360: Effective Manager Survey (KSAM) - Sort

Group Close Date: 03-31-2021

Qualified Administrator: Teamtelligent Testing

[RETURN TO GROUP - 2.S.3.REL.T.TEST](#)

[Redacted] **Raters**

Show entries

Search:

First Name	Last Name	Email	Rater Type	Done	Options	Invite Sent
[Redacted]	[Redacted]	[Redacted]	Manager	N	Re-Send Edit Remind Delete	10-22-2020

Showing 1 to 1 of 1 entries

Previous Next

Add new raters

Option 1 - Click to bulk upload raters to this group.

Option 2 - Add Individual Rater below.

Enter Raters individually or by a file upload

* First Name

* Last Name

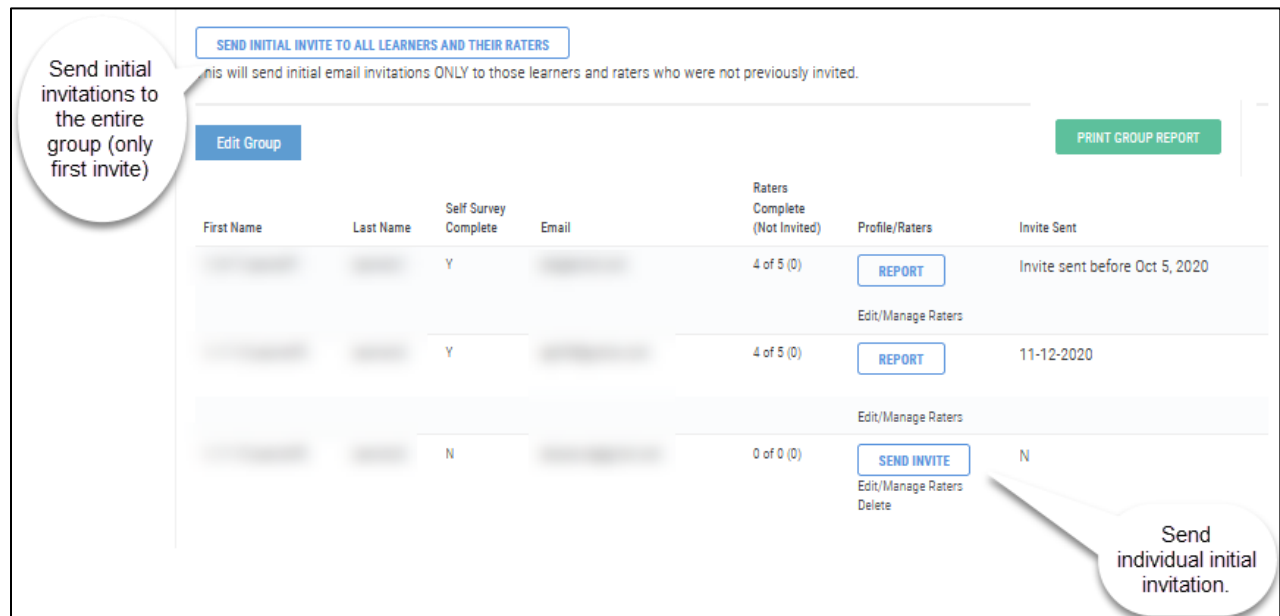
* Email

* Rater Type

[SAVE RATER](#)

Step 6: From the Manage Learners & Reports Page, use the 'send invite' button to invite all participants.

You can also invite selectively, at the learner level, at the rater level. Raters cannot be invited before their learner has been invited. Additional learners and raters can be added to the group at any time.



SEND INITIAL INVITE TO ALL LEARNERS AND THEIR RATERS
This will send initial email invitations ONLY to those learners and raters who were not previously invited.

Edit Group **PRINT GROUP REPORT**

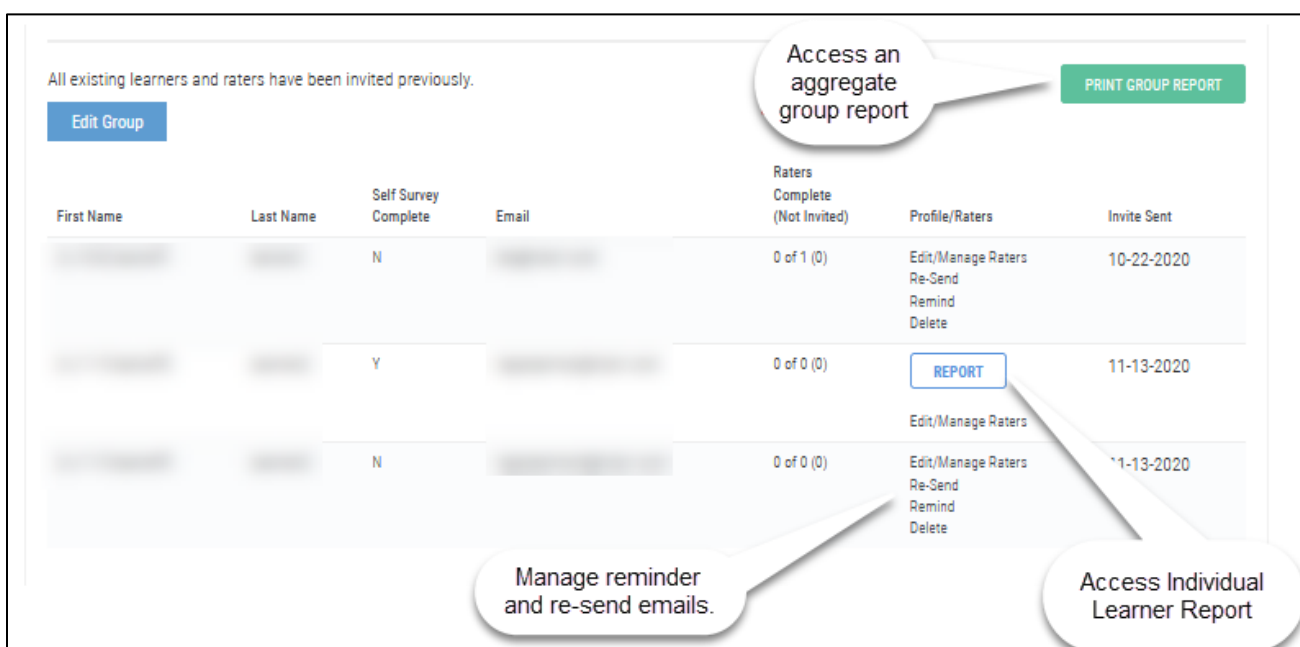
First Name	Last Name	Self Survey Complete	Email	Raters Complete (Not Invited)	Profile/Raters	Invite Sent
[Redacted]	[Redacted]	Y	[Redacted]	4 of 5 (0)	REPORT	Invite sent before Oct 5, 2020
					Edit/Manage Raters	
[Redacted]	[Redacted]	Y	[Redacted]	4 of 5 (0)	REPORT	11-12-2020
					Edit/Manage Raters	
[Redacted]	[Redacted]	N	[Redacted]	0 of 0 (0)	SEND INVITE	N
					Edit/Manage Raters Delete	

Send initial invitations to the entire group (only first invite)

Send individual initial invitation.

Additional functions are available at the Learner and the Rater Levels.

- Sending of individual and group emails. Reminders and re-send of the original emails (only to those who have not
- Accessing Learner Individual reports or Group Aggregate Report



All existing learners and raters have been invited previously.

Edit Group **PRINT GROUP REPORT**

First Name	Last Name	Self Survey Complete	Email	Raters Complete (Not Invited)	Profile/Raters	Invite Sent
[Redacted]	[Redacted]	N	[Redacted]	0 of 1 (0)	Edit/Manage Raters Re-Send Remind Delete	10-22-2020
[Redacted]	[Redacted]	Y	[Redacted]	0 of 0 (0)	REPORT	11-13-2020
					Edit/Manage Raters	
[Redacted]	[Redacted]	N	[Redacted]	0 of 0 (0)	Edit/Manage Raters Re-Send Remind Delete	11-13-2020

Access an aggregate group report

Manage reminder and re-send emails.

Access Individual Learner Report