



MULTIRATER SURVEYS

USER GUIDE



JANUARY 2023



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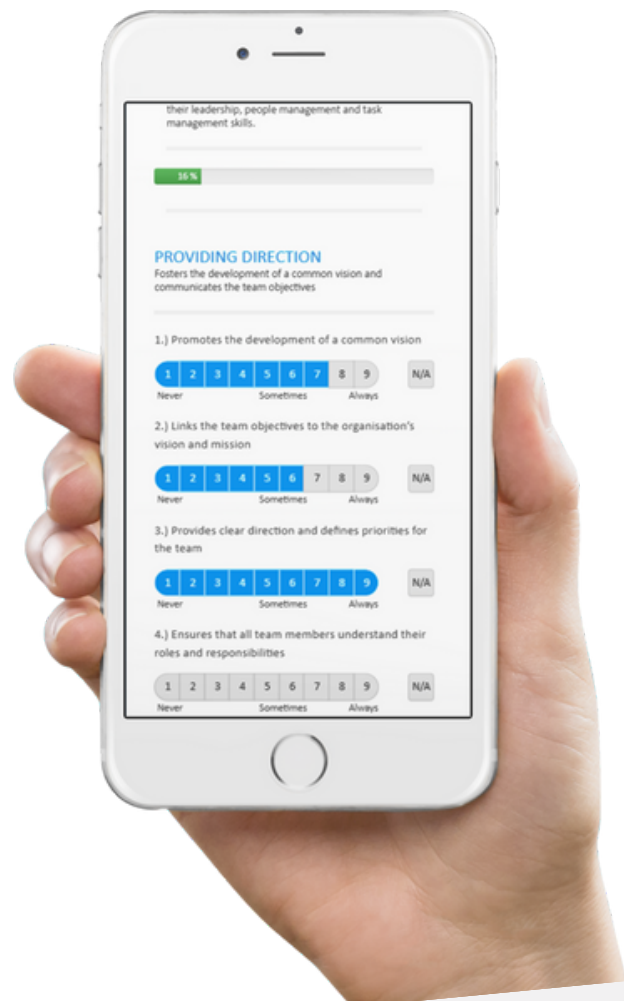
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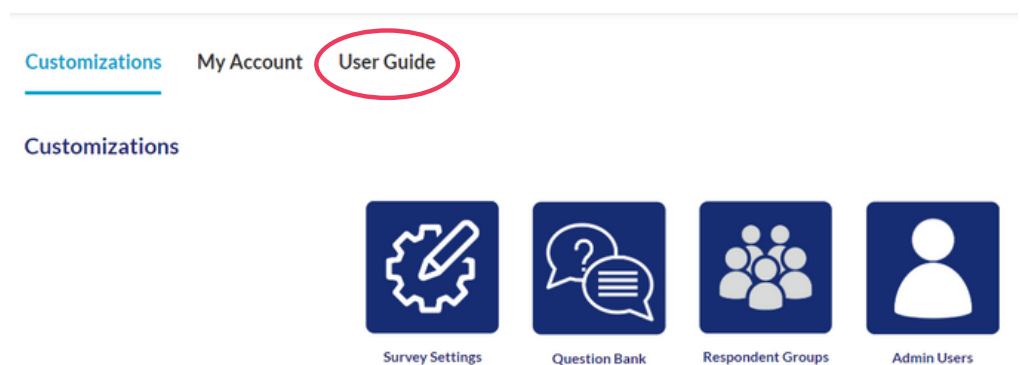
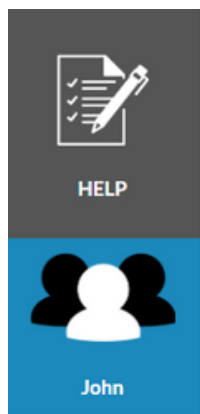
January 2023

NEW UI EXPERIENCE

To introduce the recently renewed User Interface for MultiRater Surveys, we have designed an updated version of our User Guide for our clients to maximize the benefits of our powerful survey platform.

We are continually adding new functional capabilities to the platform, so please ensure you have downloaded the most recent User Guide.

The most recent User Guide can be found by clicking on the bottom-most tab with your account name



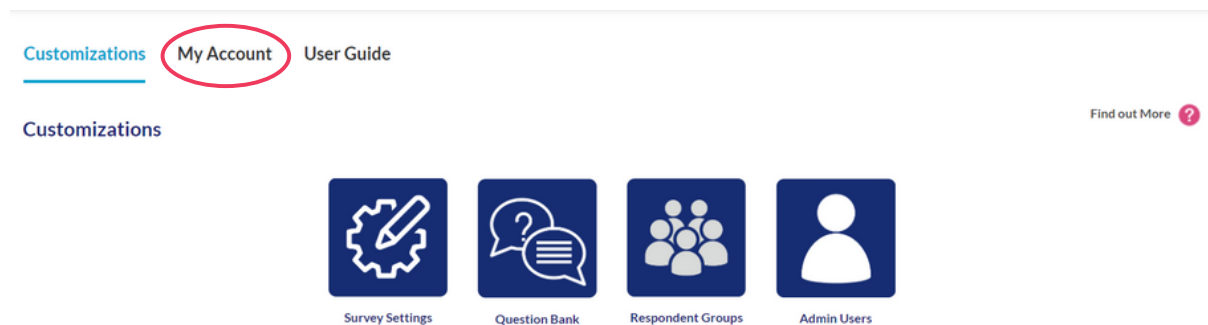
HOW TO LOG IN?

1. Click on www.MultiRaterSurveys.com
2. Click on LOG IN located in the top right corner
3. Enter in your Username (your registered email address)
4. Enter in your Password
5. Click on SIGN IN



ADMINISTRATION - ACCOUNT SET UP

To edit your user and company details and logo at any time, access your **Accounts Page**, and click on **My Account**.

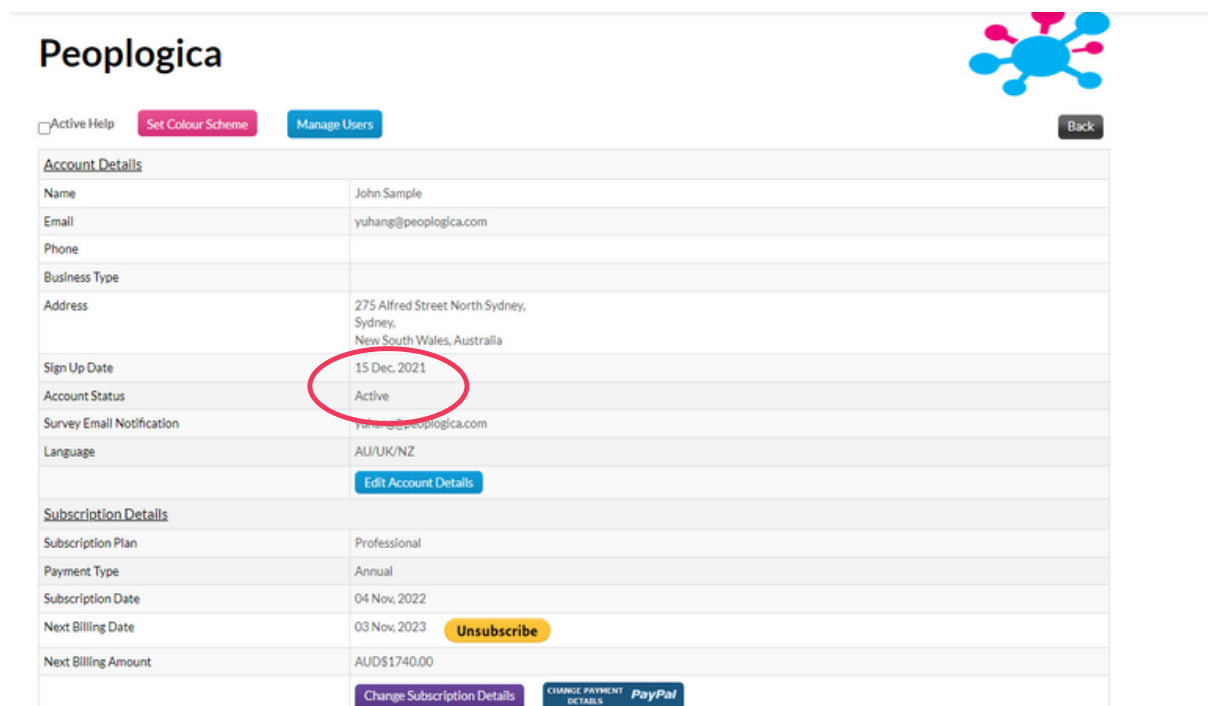


Customizations **My Account** User Guide

Customizations [Find out More ?](#)

Survey Settings Question Bank Respondent Groups Admin Users

- To edit your company or personal details, or switch languages, click on **Edit Account Details**.
- To add new admin users to your account, click on **Manage Users**



Peoplogica

☐ Active Help [Set Colour Scheme](#) [Manage Users](#) [Back](#)

Account Details

Name	John Sample
Email	yuhang@peoplogica.com
Phone	
Business Type	
Address	275 Alfred Street North Sydney, Sydney, New South Wales, Australia
Sign Up Date	15 Dec, 2021
Account Status	Active
Survey Email Notification	yuhang@peoplogica.com
Language	AU/UK/NZ

[Edit Account Details](#)

Subscription Details

Subscription Plan	Professional
Payment Type	Annual
Subscription Date	04 Nov, 2022
Next Billing Date	03 Nov, 2023
Next Billing Amount	AUD\$1740.00

[Unsubscribe](#) [Change Subscription Details](#) [CHANGE PAYMENT DETAILS](#) [PayPal](#)



Enter the changes you wish to make.

1. To change your password, click on Edit Password and follow instructions
2. Select which email address (account holder or MRS' internal) you want survey invitations to come from
3. To upload your company logo, click on the logo image and upload the image you require to appear within the online survey and on the reports. PLEASE NOTE: Logos must be a maximum 5MB and NO MORE THAN 300 x 60 pixels in size
4. Once you have made all required changes, click on Update to save

Peoplogica

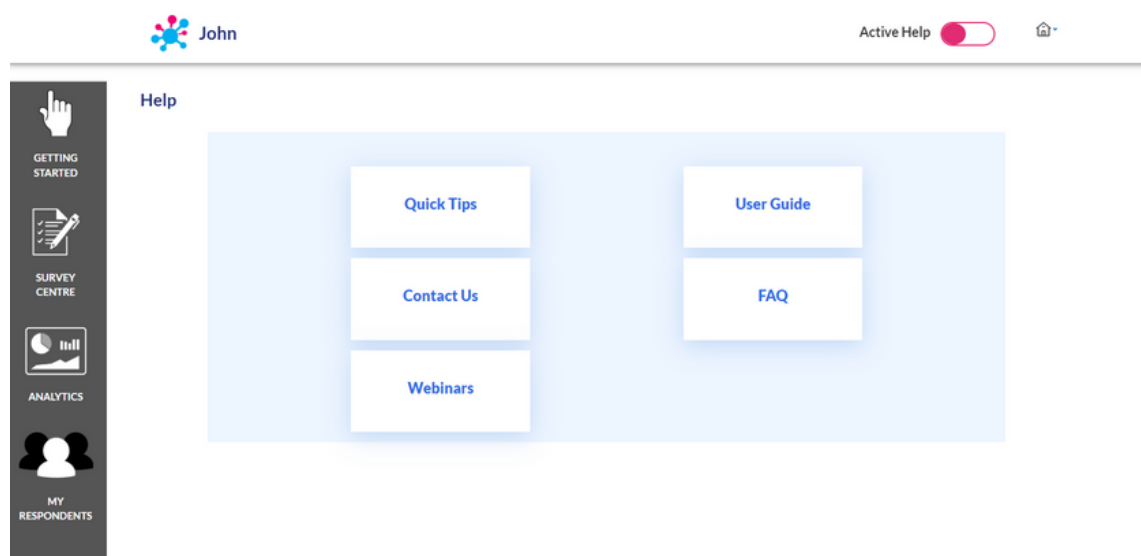


Image should not be more than 5MB in size and should have extensions .gif, .jpg, .jpeg, .png or .tiff

Delete Logo

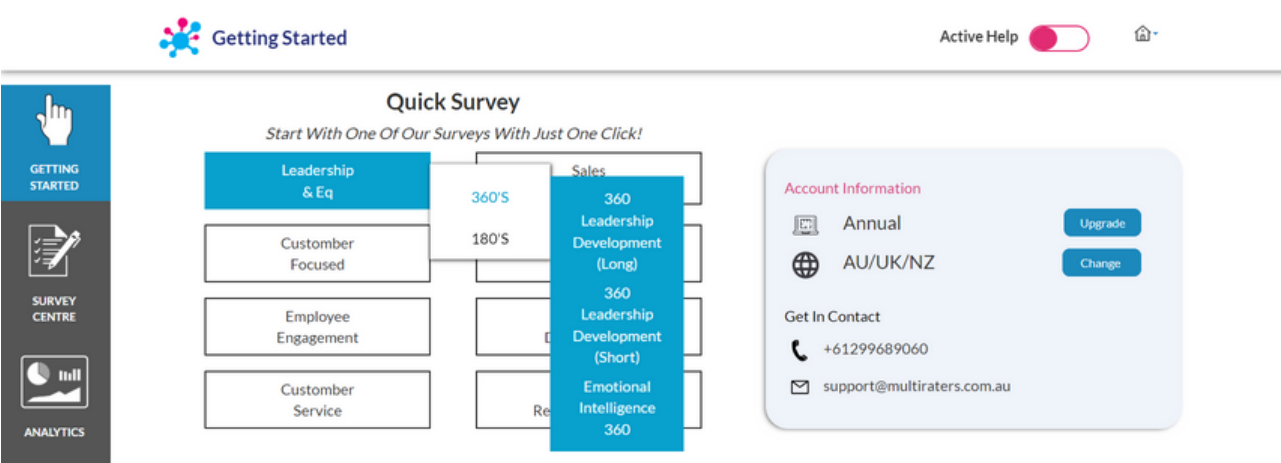
Company Name	Peoplogica	
Name	John	Sample
Email	yuhang@peoplogica.com	
Survey Email Notification	info@multiratersurveys.com	<input type="checkbox"/> Off
	yuhang@peoplogica.com	<input checked="" type="checkbox"/> On
	Edit Password	
Phone	Contact Number	
Business Type	Sport, Leisure	

For more information, help, and overall tips on how to best utilise the platform, please head to the **HELP** tab on the bottom of the navigation panel

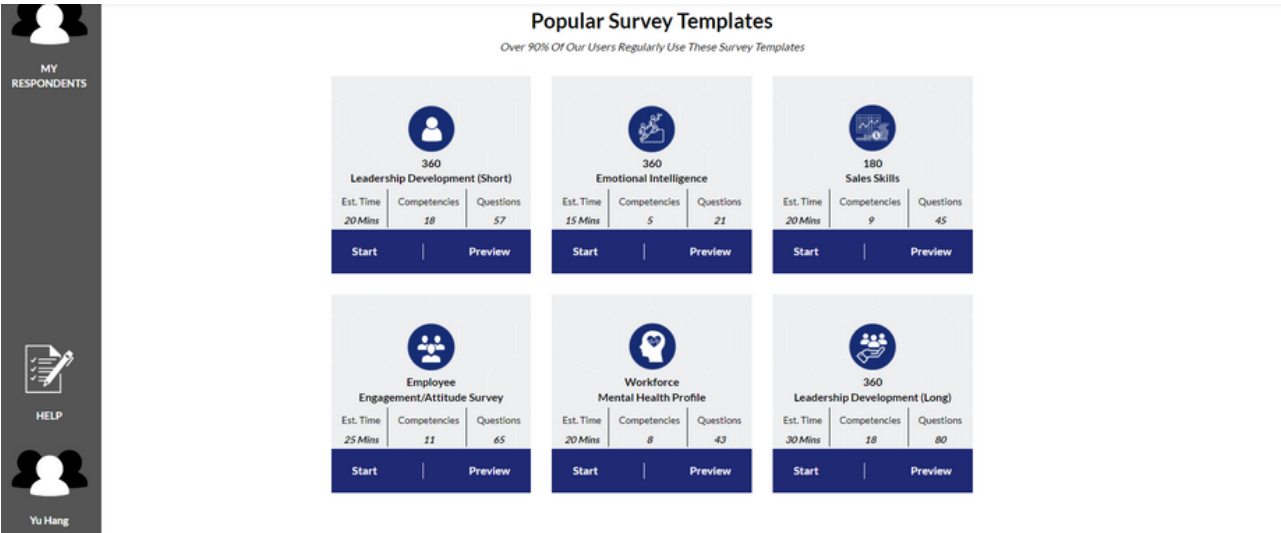


GETTING STARTED - QUICK SURVEYS

To get started utilizing our platform's own templates, simply hover over the desired survey topic, and select a survey that matches your requirements and needs.



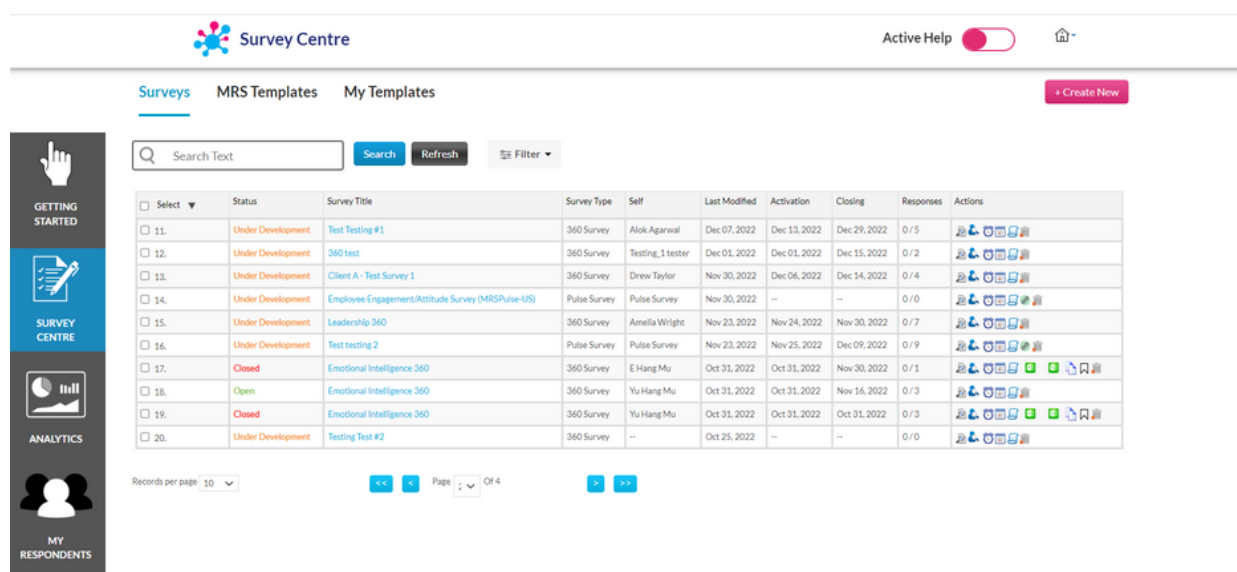
Alternatively, access MultiRater Survey's most popular survey templates (used by over 90% of our users)



SURVEY CENTRE

Under **Survey Centre**, you will find all of your surveys that you have been working on.

Surveys that are *Under Development* indicate that either there is still more work to be done, or that they are waiting to be launched. Surveys that are *Open* indicates that respondents are now able to access their surveys. *Closed* surveys mean that neither the administrator nor respondents can access the survey unless it is reopened.



Select	Status	Survey Title	Survey Type	Self	Last Modified	Activation	Closing	Responses	Actions
<input type="checkbox"/>	Under Development	Test Testing #1	360 Survey	Alok Agarwal	Dec 07, 2022	Dec 13, 2022	Dec 29, 2022	0/5	
<input type="checkbox"/>	Under Development	360 test	360 Survey	Testing, 1 tester	Dec 01, 2022	Dec 01, 2022	Dec 15, 2022	0/2	
<input type="checkbox"/>	Under Development	Client A - Test Survey 1	360 Survey	Drew Taylor	Nov 30, 2022	Dec 06, 2022	Dec 14, 2022	0/4	
<input type="checkbox"/>	Under Development	Employee Engagement/Attitude Survey (MRSPulse-US)	Pulse Survey	Pulse Survey	Nov 30, 2022	--	--	0/0	
<input type="checkbox"/>	Under Development	Leadership 360	360 Survey	Amelia Wright	Nov 23, 2022	Nov 24, 2022	Nov 30, 2022	0/7	
<input type="checkbox"/>	Under Development	Test testing 2	Pulse Survey	Pulse Survey	Nov 23, 2022	Nov 25, 2022	Dec 09, 2022	0/9	
<input type="checkbox"/>	Closed	Emotional Intelligence 360	360 Survey	E Heng Mu	Oct 31, 2022	Oct 31, 2022	Nov 30, 2022	0/1	
<input type="checkbox"/>	Open	Emotional Intelligence 360	360 Survey	Yu Hang Mu	Oct 31, 2022	Oct 31, 2022	Nov 16, 2022	0/3	
<input type="checkbox"/>	Closed	Emotional Intelligence 360	360 Survey	Yu Hang Mu	Oct 31, 2022	Oct 31, 2022	Oct 31, 2022	0/3	
<input type="checkbox"/>	Under Development	Testing Test #2	360 Survey	--	Oct 25, 2022	--	--	0/0	

SURVEY ACTIONS

All surveys are equipped with action buttons that will allow you to interact with particular aspects of the survey - depending on what stage the survey is in. For example:



View Survey Respondents

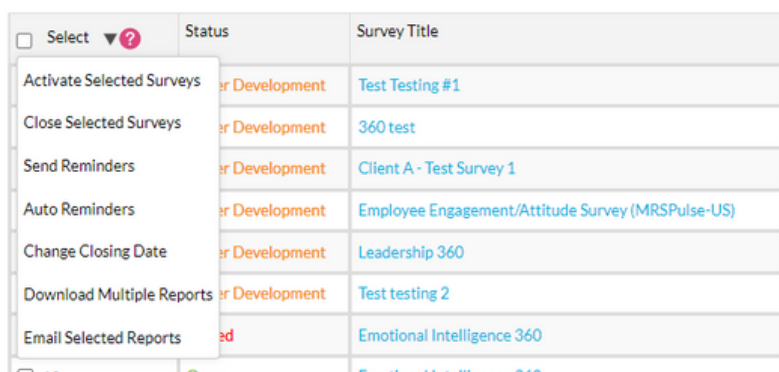


Save Survey as Template



Generate Report

- To action on multiple surveys, select multiple surveys and hover over the drop-down



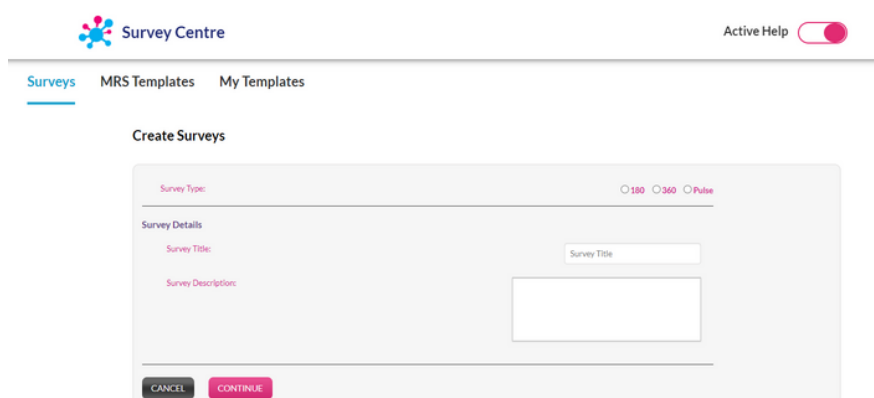
Select	Status	Survey Title
<input type="checkbox"/>	Under Development	Test Testing #1
<input type="checkbox"/>	Under Development	360 test
<input type="checkbox"/>	Under Development	Client A - Test Survey 1
<input type="checkbox"/>	Under Development	Employee Engagement/Attitude Survey (MRSPulse-US)
<input type="checkbox"/>	Under Development	Leadership 360
<input type="checkbox"/>	Under Development	Test testing 2
<input type="checkbox"/>	Closed	Emotional Intelligence 360
<input type="checkbox"/>	Open	Emotional Intelligence 360



SURVEY CENTRE - CREATE YOUR OWN SURVEY FROM SCRATCH

To create a survey completely from scratch, follow the steps below:

1. Click on **Create New** and you will be brought a separate page
2. Enter the name of the survey you want to create in the **Survey Title** field
3. Enter a survey description in the **Survey Description** field. This description appears at the top of each page in the online survey
 - a. Select the Survey Type (either 180, 360 or Pulse)
 - b. Click Continue to start customising your survey question groups, questions, respondent groups and respondents

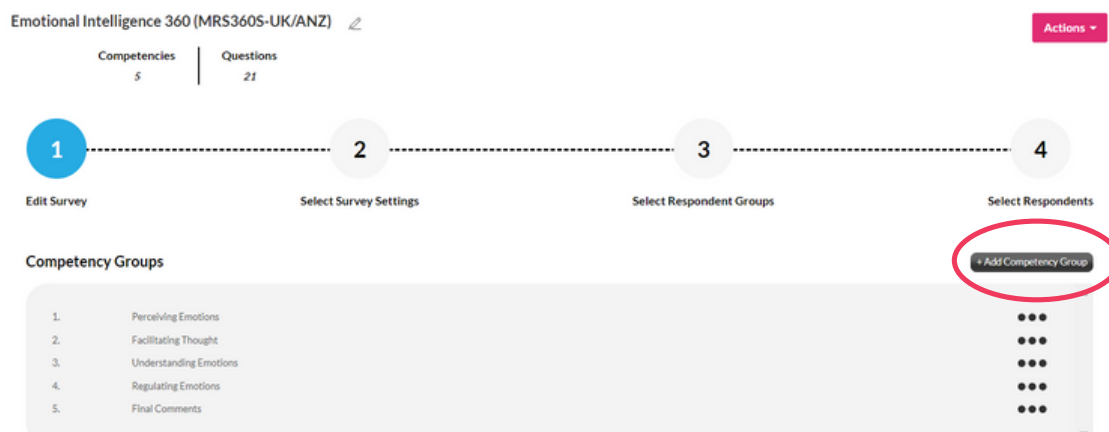


The screenshot shows the 'Survey Centre' interface. At the top, there's a navigation bar with 'Surveys', 'MRS Templates', and 'My Templates'. Below this is the 'Create Surveys' section. It includes a 'Survey Type' selector with radio buttons for '180', '360', and 'Pulse'. Under 'Survey Details', there are input fields for 'Survey Title' and 'Survey Description'. At the bottom of the form are 'CANCEL' and 'CONTINUE' buttons. An 'Active Help' toggle is visible in the top right corner.

Every survey consists of four simple steps for customization:

STEP 1: Edit Survey

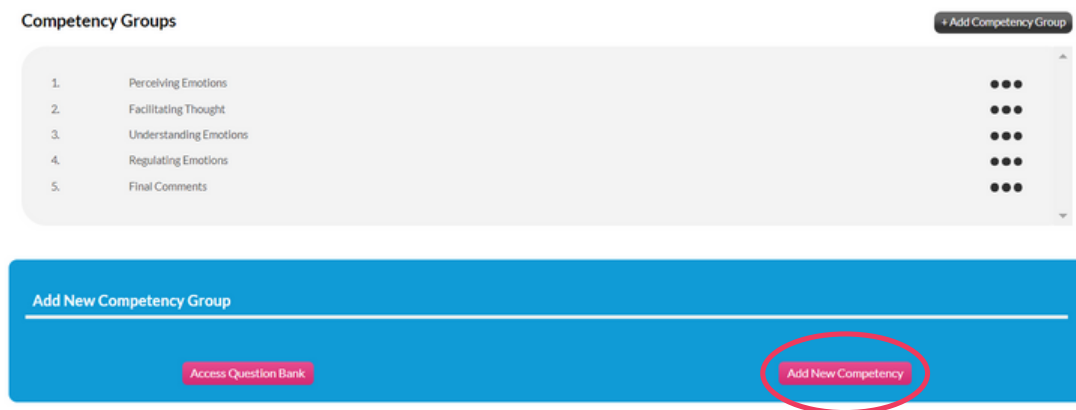
- STEP 1: Edit Survey to add and customize your survey question groups and questions.
 - To add a Competency Group, click on the **Add Competency Group** button



The screenshot displays the 'Emotional Intelligence 360 (MRS360S-UK/ANZ)' survey setup page. It features a progress bar with four steps: 1. Edit Survey (highlighted), 2. Select Survey Settings, 3. Select Respondent Groups, and 4. Select Respondents. Below the progress bar, the 'Competency Groups' section lists five items: 'Perceiving Emotions', 'Facilitating Thought', 'Understanding Emotions', 'Regulating Emotions', and 'Final Comments'. On the right side of this list, there is a button labeled '+ Add Competency Group', which is circled in red. An 'Actions' dropdown menu is located in the top right corner.

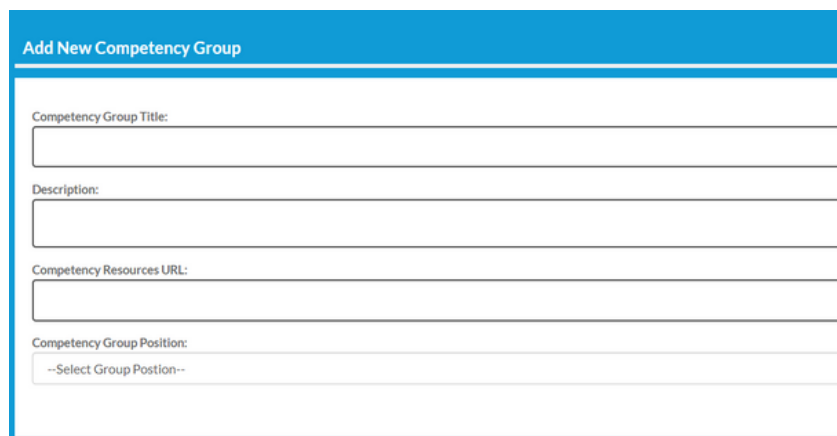


- There are two options for adding competencies, you can either select existing ones from the **Question Bank**, or create a new one by clicking **Add New Competency**



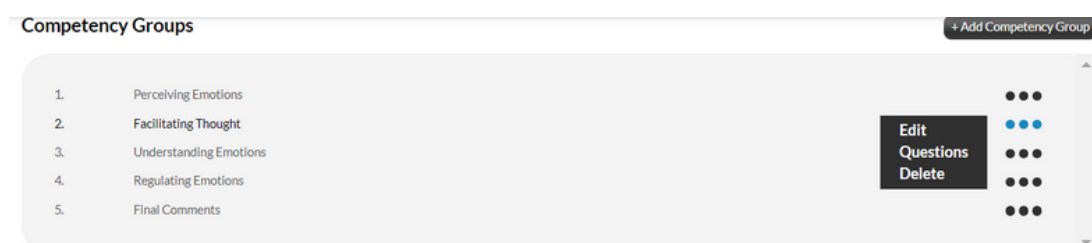
The screenshot shows the 'Competency Groups' section. At the top right is a '+ Add Competency Group' button. Below it is a list of five groups: 1. Perceiving Emotions, 2. Facilitating Thought, 3. Understanding Emotions, 4. Regulating Emotions, and 5. Final Comments. Each group has a three-dot menu icon to its right. At the bottom of the interface is a blue bar with two buttons: 'Access Question Bank' and 'Add New Competency' (which is circled in red).

- To create an entirely new competency group, you will need to fill in the details below
 - OPTIONAL** - if you have a designated link that has further information on your competency, please link it in **Competency Resources URL**



The screenshot shows the 'Add New Competency Group' form. It has a blue header with the title 'Add New Competency Group'. Below the header are four text input fields: 'Competency Group Title:', 'Description:', 'Competency Resources URL:', and 'Competency Group Position:'. The 'Competency Group Position:' field has a dropdown menu with the option '--Select Group Position--'.

- To access the set of questions under each competency, hover over the ellipsis and click on **Questions**



The screenshot shows the 'Competency Groups' section. At the top right is a '+ Add Competency Group' button. Below it is a list of five groups: 1. Perceiving Emotions, 2. Facilitating Thought, 3. Understanding Emotions, 4. Regulating Emotions, and 5. Final Comments. Each group has a three-dot menu icon to its right. A dark grey box is overlaid on the right side of the list, containing the options 'Edit', 'Questions', and 'Delete'.



- To edit a question, hover over the ellipsis for the question, and click on **Edit**
 - Each question contains content for both Self and Others, whether it has a Rating Scale, Comment Box or both, whether the question will include an N/A option, the Question Group it is being allocated to and the position you want it to appear within the Question Group
- Similarly, to add a new question, click on **+ Add Question** and follow the same steps

The screenshot shows the 'Preview / Edit' interface for a survey question. It has a blue header bar with the text 'Preview / Edit'. Below the header, there are two text input fields: 'Question Self:' and 'Question Others:'. The 'Question Self:' field contains the text 'I can accurately identify how other employees are feeling at work'. The 'Question Others:' field contains the text '[FIRSTNAME] accurately identifies how I am feeling at work'. To the right of these fields, there is a small example text: 'Eg: When do you demonstrate the courage to take charge?'. Below the input fields, there are two checkboxes: 'Add Rating Scale' (checked) and 'Add Comment Box' (unchecked). Below these, there are two radio buttons: 'Include N/A' (selected) and 'Exclude N/A' (unselected). Below the radio buttons, there is a 'Question Group:' dropdown menu with 'Perceiving Emotions' selected. To the right of the dropdown menu, there is a 'Question Position:' dropdown menu with '1' selected. At the bottom right of the interface, there is an 'Update' button.

- Access Question Bank
 - Click on **Access Question Bank** to add extra pre-existing question groups and questions to your survey. These are either pre-existing question groups provided with the MRS site or those that you have previously created.
 - Select the Question Group from the dropdown menu
 - Add questions by ticking the box to the left of the selected questions, then click **Add Multiple Questions To Survey**

The screenshot shows the 'Question Bank' interface. It has a blue header bar with the text 'Question Bank'. Below the header, there is a 'Back to Survey' button and an 'Add Multiple Questions to Survey' button. Below these buttons, there is a dropdown menu with 'BUILDING RELATIONSHIPS (MRS)' selected. Below the dropdown menu, there is a search bar with the text 'Search Questions'. Below the search bar, there is a list of questions. The first question is 'Self: You can be trusted with confidential information' and 'Others: [FIRSTNAME] can be trusted with confidential information'. The second question is 'Self: You exhibit empathy and show consideration for the feelings of others' and 'Others: [FIRSTNAME] exhibits empathy and shows consideration for the feelings of others'. Both questions have a 'Type: Rating Scale' label. To the right of the second question, there is a red 'Added' label.

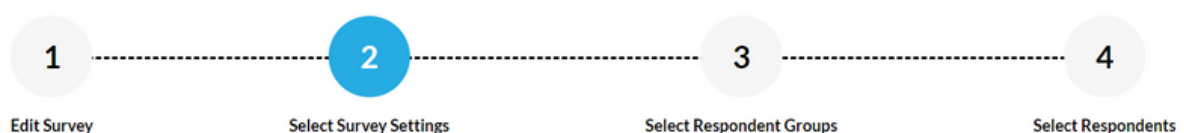


- Add an NPS® question to your survey
 - Click on **Set NPS Score Question** to add an NPS question to your survey. The three pre-existing NPS questions include EmployeeNPS, ClientNPS and LeadershipNPS.
 - Select the relevant NPS Question from the dropdown menu and this will add the question to the end of your survey
- Once you've made all necessary customizations to your survey questionnaire, you can download it in a CSV file by clicking on **Download Questionnaire**
- To experience what a respondent will see, click on **Preview Survey**



STEP 2: Select Survey Settings

- Click on **STEP 2: Select Survey Settings** to select your survey content templates. When all content templates have been selected click on Save Settings



Survey Settings

Add Demographic Questions*

+ Add/Edit Demographic Questions

Current Questions

- For Pulse surveys you can add demographic questions to your survey in the survey settings. First click the **+Add/Edit Demographic Questions**
- Type out your demographic question, choose your order and add the selectable options. Click the **+Add New Option** to add more selectable options
- Click Save and return to Step 2: Survey Settings
- For pulse surveys you can also add a survey open link. Customise the link and click Save to complete



STEP 3: Select Respondent Groups

- Click on **STEP 3: Select Respondent Groups** to select the respondent groups for this survey
 - Select the respondent groups for your survey then click Add
 - You can add new respondent groups to your list by clicking **+Add Respondent**
 - Order the respondent groups in the order you would like them to appear, using the arrows to the right of the Selected Respondent Groups box

Respondent Groups

+ Add Respondent Groups

☐ Select All
☐ Employee
☐ CEO
☐ Manager

Remove

save

- Click Save
- A window will appear asking whether you wish to Save this survey as one of your templates. By saving surveys as templates, you will not have to go through the set-up process for this survey in future - all you will need to do is select the respondents.
- To do this enter in a template name and then click on Yes. The survey will be saved in the Template Survey library for future use

STEP 4: Select Respondents

- Click on **STEP 4: Select Respondents** to select the individuals you require to complete the survey. A library of the all respondents who have been previously loaded into your site will appear

All Departments ▼ All Roles ▼

Search Your Respondents

☐ Ali Kaymakam
☐ Alok Agarwal
☐ Ameen Mo
☐ Amelia Wright
☐ Ami Mohan
☐ Andrew Simpson
☐ Anna Govender
☐ Anne White

Add



- Scroll or search respondent names then click Add
- Click the +Add Respondent to add new respondents that aren't in your list.
- For larger respondent groups, especially in the case of Pulse surveys, search using the Department and/or Role designation dropdown lists. Hold down Shift and select the names then click Add
- If you wish to remove selected respondents from the Your Selected Respondent box, select their name and click Remove

Respondents[+ Add Respondent](#)

- ☐ Andy Sample
- ☐ Jake Sample
- ☐ John Sample
- ☐ Whitney Sample

[Remove](#)

- Click Save respondents and allocate to respondent groups
- Click on the Assign Respondent Group drop down box next to each respondent name and allocate group from the respondent groups you previously selected for this survey

--Assign Respondent Group to Selected Respondents--	
Respondent	Respondent Group
<input type="checkbox"/> Select All	
<input type="checkbox"/> Andy : Sample	Employee
<input type="checkbox"/> Jake : Sample	CEO
<input type="checkbox"/> Whitney : Sample	Manager
<input type="checkbox"/> John : Sample	Employee

[Save](#) [Back](#)

- If you have a large number of respondents (e.g. Pulse surveys), you can filter the selected respondents using the Department and Role dropdowns, then use the Assign Respondent Group to Selected Respondents dropdown to allocate all selected respondents to a respondent group
- Click Save



- Select the Activation Settings, such as opening and closing dates of the survey and how often you would like the system to generate automatic email reminders to respondents who have incomplete surveys and click Save

Activation Settings[?]

Start Date

Close on

Automatic Reminder Sent Every # Days
Set as '0' or leave blank if you do not want to set automatic reminder

[Save](#)

- Please note that the survey will not auto-activate on a future date but the system will send the administrator an email reminding them to activate the survey. This is to prevent a survey from being activated unintentionally

- You will be taken to the **Survey Centre**. To activate your survey and automatically send out the email invitations, tick your survey in the left column, hover over *Select*, and click "**Activate Selected Surveys**". It will turn green, and the Status column will change to **"Open"**

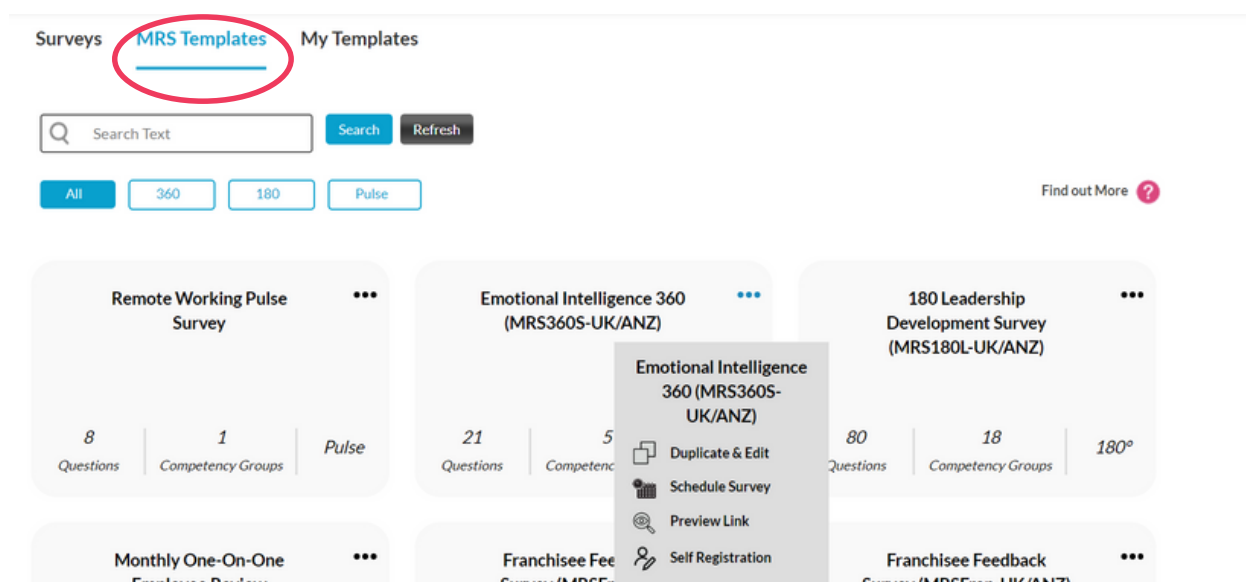
Surveys MRS Templates My Templates + Create New									
<input type="text" value="Search Text"/> Search Refresh Filter									
<input type="checkbox"/> Select ▼	Status	Survey Title	Survey Type	Self	Last Modified	Activation	Closing	Responses	Actions
<input type="checkbox"/> 1.	Under Development	Emotional Intelligence 360 (MRS360S-UK/ANZ)	360 Survey	Jake Sample	Jan 13, 2023	Jan 13, 2023	Jan 17, 2023	0 / 4	Edit Share Print



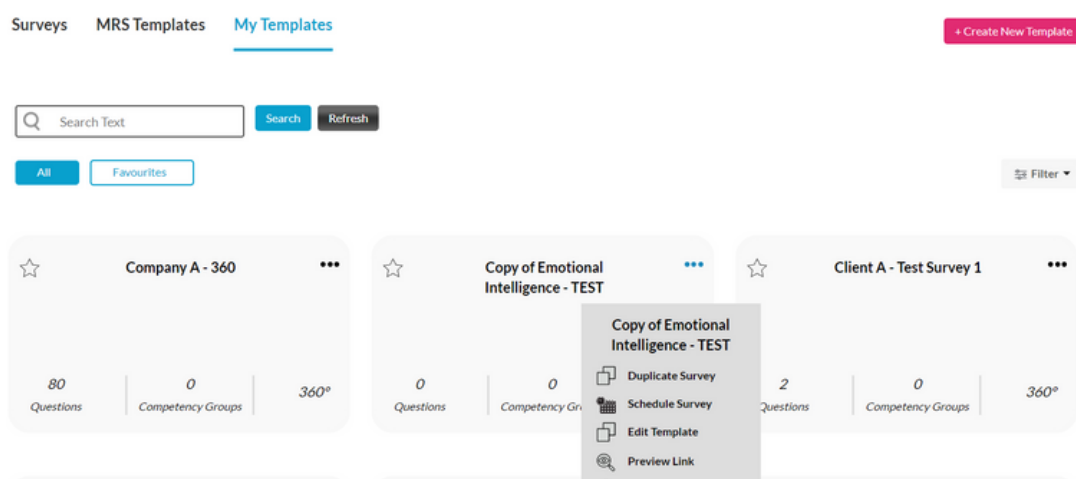
SURVEY TEMPLATES - MRS

All our MultiRater Surveys' survey templates are located in the **MRS Templates** tab. There are a few actionable options for each template:

- *Duplicate & Edit* allows you to duplicate the template and transfer it to **My Survey Templates**, allowing you to customize the template to your requirements
- *Schedule Surveys* are used for launching either single or multiple surveys at once
- *Preview Link* allows you to share a link to appropriate parties for a preview
- *Self-Registration* is a link that will allow the respondents to fill out their own respondent list information (NOTE - this is only available for 360-degree surveys)

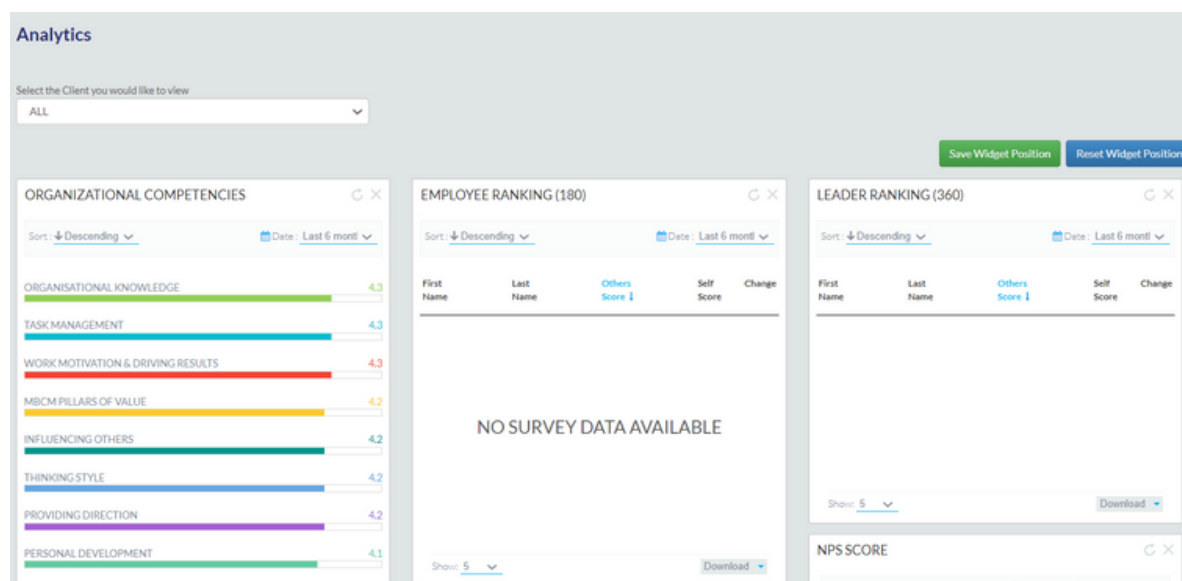


All survey templates created by you will be located in **My Templates**.



ANALYTICS

- **Analytics** is a snapshot of your organization and gives you a clear view of your strengths and weaknesses:
 - a. The Organizational Competencies graph highlights your top and bottom overall competencies across all surveys.
 - b. The three NPS scores for Client, Leadership and Employee surveys.
 - c. The Employee Ranking (180) and Leader Ranking (360) give you an overview of your current top and bottom managers and employees allowing you to quickly analyze which employees need support.
 - d. Current active surveys
 - i. You can manage the widgets or change the layout of the Performance Monitor Dashboard by clicking on Widgets or Layout at the top of the page.



MY RESPONDENTS

- All respondents information, across all surveys, are located in the **My Respondents** tab.

My Respondents

Active Help ☐ Home

Manage Respondents

Search Text Search Filter Delete Selected

S. No.	Name	Email	Actions
1. <input type="checkbox"/>	Andy Sample	andy@sample.com	View / Edit Delete
2. <input type="checkbox"/>	Jake Sample	jake@mail.com	View / Edit Delete
3. <input type="checkbox"/>	John Sample	john@sam.com	View / Edit Delete
4. <input type="checkbox"/>	Whitney Sample	whitney@sample.com	View / Edit Delete

GETTING STARTED

SURVEY CENTRE

ANALYTICS

MY RESPONDENTS

Add Respondents

- To upload respondents, there two options available. For a large amount of respondents we recommend using the bulk upload function (Option 1). For a small amount of respondents you can simply add respondents one by one (Option 2).

Manage Respondents >>> Add Respondents

Add Respondents

NOTE: In this section, you can upload details of your respondents (i.e. employees, clients, etc.) who will participate in your surveys.

First Name* Last Name* Email* Role Title / Designation Department

+ Add New Row

SAVE ABOVE RESPONDENTS **UPLOAD CSV**

- *Option 1* – bulk uploading respondents
 - Click on **Upload CSV**
 - A box with the uploading instructions will appear. Please read through these carefully when preparing your CSV file for uploading. Once you have chosen your file, click on *Import*



Upload CSV

Choose File No file chosen

Instructions to Upload CSV file:
1.) Open a blank MS Excel spreadsheet. Starting from A1 to E1, fill 'First Name', 'Last Name', 'Email', 'Role Title / Designation', 'Department' for first respondent. Similarly fill same details for second respondent from A2 to E2. And so on....
2.) After you are done, click on 'Save As', choose save type as 'CSV (Comma delimited) (*.csv)' and save the file in csv format with extension as .csv

NOTE:
#1) 'First Name', 'Last Name' & 'Email' are mandatory fields, make sure that they are not left blank for any entry.
#2) 'Email' should be in format: someone@example.com

IMPORT

- *Option 2* – uploading Respondents one by one
 - Enter the First Name, Last Name, Email Address, Role Title and Department of each respondent, clicking on **+ Add New Row** to add subsequent respondent details

Manage Respondents >>> Add Respondents

Add Respondents

NOTE: In this section, you can upload details of your respondents (i.e. employees, clients, etc.) who will participate in your surveys.

First Name*

Last Name*

Email*

Role Title / Designation

Department

[+ Add New Row](#)

SAVE ABOVE RESPONDENTS

OR

UPLOAD CSV



CUSTOMIZATIONS

SURVEY SETTINGS

To create customised survey settings templates, please follow the steps below:

1. Scroll down and click on the tab which states the account holder's name
2. Click on **Survey Settings**. You will be taken to the Client Survey Content Templates library
3. The **Client Survey Content Template** library lists all of the templates that can be customised. Click on the View/Edit button to the right of a template description to view available templates.

Customizations >>> Client Survey Content Templates



Client Survey Content Templates

Survey Settings

1.	Survey Scale	View / Edit	+ Add
2.	Survey Buttons	View / Edit	+ Add

Email Notifications

1.	Self Person Notification Email Content	View / Edit	+ Add
2.	Other Participant Notification Email Content	View / Edit	+ Add

Report Settings

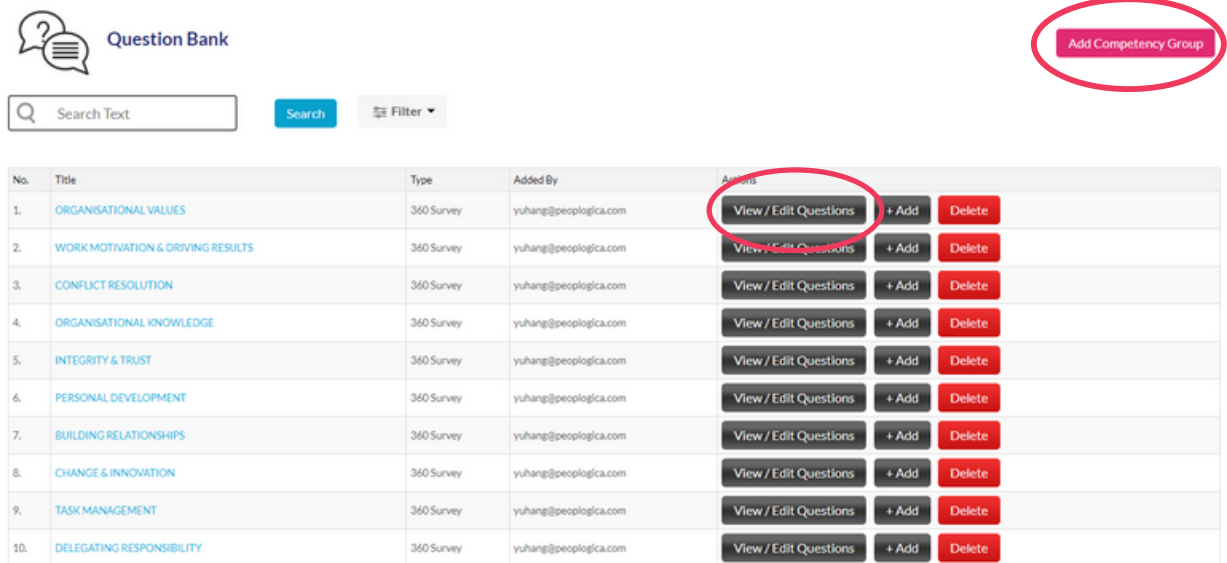
1.	Report Introduction Page Content	View / Edit	+ Add
2.	Report Summary Page Content	View / Edit	+ Add
3.	Report Content (Summary Pages)	View / Edit	+ Add

1. To create a new Survey Scale or Survey Button, simply click + *Add* and enter desired content
2. For all other content templates we recommend that you use an existing MRS template as the base to ensure you have all the necessary hyperlinks.
 - a. Click +*Add* and then select *Copy Template*
 - b. Customise wording as desired but do not delete any of the hyperlinks
 - c. Save the template under a new name



QUESTION BANK

The **Question Bank** is where Competency Groups and Questions are stored. You have the option to store new Competency Groups and Questions in the Question Bank before creating a survey. Alternatively you can also add questions as-you-go while creating a survey and these will automatically be saved in the Question Bank.



No.	Title	Type	Added By	Actions
1.	ORGANISATIONAL VALUES	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
2.	WORK MOTIVATION & DRIVING RESULTS	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
3.	CONFLICT RESOLUTION	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
4.	ORGANISATIONAL KNOWLEDGE	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
5.	INTEGRITY & TRUST	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
6.	PERSONAL DEVELOPMENT	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
7.	BUILDING RELATIONSHIPS	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
8.	CHANGE & INNOVATION	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
9.	TASK MANAGEMENT	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
10.	DELEGATING RESPONSIBILITY	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete

- Click on View Questions to view, edit, delete and add questions to a Competency Group
- To add a new Competency Group click + Add Competency Group. Then type in the competency title, description, competency resources URL and type of survey it will be used for (180, 360, Pulse or Open)

Add New Competency Group

Competency Group Title:

Description:

Competency Resources URL:

Competency Group Type:

ADD



- To add questions to a Question Group click + *Add Question*.

Customizations >>> Question Bank >>> View Questions

Leadership Development

Search Text

Search

Refresh

+ Add Question

S. No.	Question Self Text	Question Others Text	Type	Actions
1.	You communicate work schedule / tasks and priorities to relevant personnel	[FIRSTNAME] communicates work schedule / tasks and priorities to relevant personnel	Rating Scale	View / Edit Delete
2.	You consider the impact on others when making decisions	[FIRSTNAME] considers the impact on others when making decisions	Rating Scale	View / Edit Delete

- Type in the question you want to add and select whether it is a rated question (select Rating Scale) or comment question (select Comment Box) or both

Add New Question to 'Leadership Development'

Self Question:

Eg: When do you demonstrate the courage to take charge?

Others Question:

Eg: When does [FIRSTNAME] demonstrate the courage to take charge? Note: [FIRSTNAME] = Self Respondent first name.

Question Type:

☒ Rating Scale

☐ Comment Box

Display Order:

Default order '0' will place this question at the end of the list

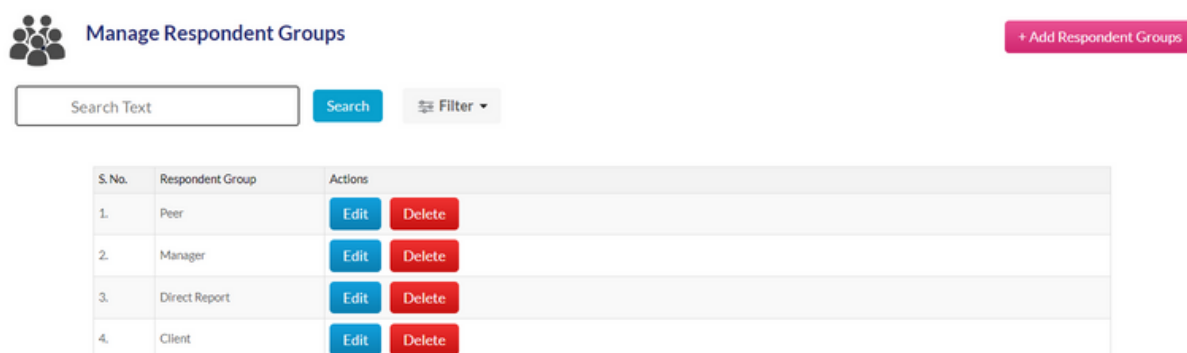
ADD



MANAGE RESPONDENTS

Respondent Groups may be customised to reflect the structure, departments and terminology of your particular organisation. Entering in this information now will allow you to allocate your respondents to a relevant group when you begin creating a survey.

- Click on **Respondent Groups**. You will be taken to the Respondent Groups library
- We have provided you with a number of default Respondent Groups and these will be listed.



S. No.	Respondent Group	Actions
1.	Peer	Edit Delete
2.	Manager	Edit Delete
3.	Direct Report	Edit Delete
4.	Client	Edit Delete

- To add your own respondent groups, click on **+ Add Respondent Groups**. Enter in the respondent group name. Then click Save

Add Respondent Groups



- To add more respondent groups please repeat the above process
- Click on the Back button to view your new group within the Manage Respondent Groups library
- You may edit or delete any of these groups, except for "SELF" as this is the primary participant group for 180 & 360 surveys. To do this click on the Edit or Delete buttons to the right of the respondent group name



TIPS & TRICKS

ADD RESPONDENTS TO EXISTING SURVEY

- To add extra Respondents to a survey that has already been opened.
 - Go to the Survey Centre and click the Survey Title of the survey you want to add respondents to
 - Click **Step 4: Select Respondents** then select and Add the extra respondents to the survey. Click Save respondents and allocate to respondent groups
 - Allocate respondents to their respondent group and then Save

REOPEN CLOSED SURVEYS

- Go to the Survey Centre
- Click **Change Survey Date** in the actions column and choose new future close off date
- Survey will now be under development so you will need to activate by clicking **Activate Survey** in the Actions column

REOPEN RESPONDENT'S SURVEY

- Go to the Survey Centre
- Click **View Respondents** in the actions tab, locate the required respondent(s) and click reopen
- NOTE - the survey itself needs to be opened for this to occur

LAUNCHING MULTIPLE SURVEYS

- Ensure that a template of the intended survey exist in either **MRS Templates** or **My Templates**
- Hover over the ellipsis and click on **Schedule Survey --> Schedule Multiple**
- Fill out an excel spreadsheet according to the stated requirements, save as a CSV and upload onto the site
- Surveys can then be located in **Survey Centre**

