MULTIRATER SURVEYS

USER GUIDE

JANUARY 2023

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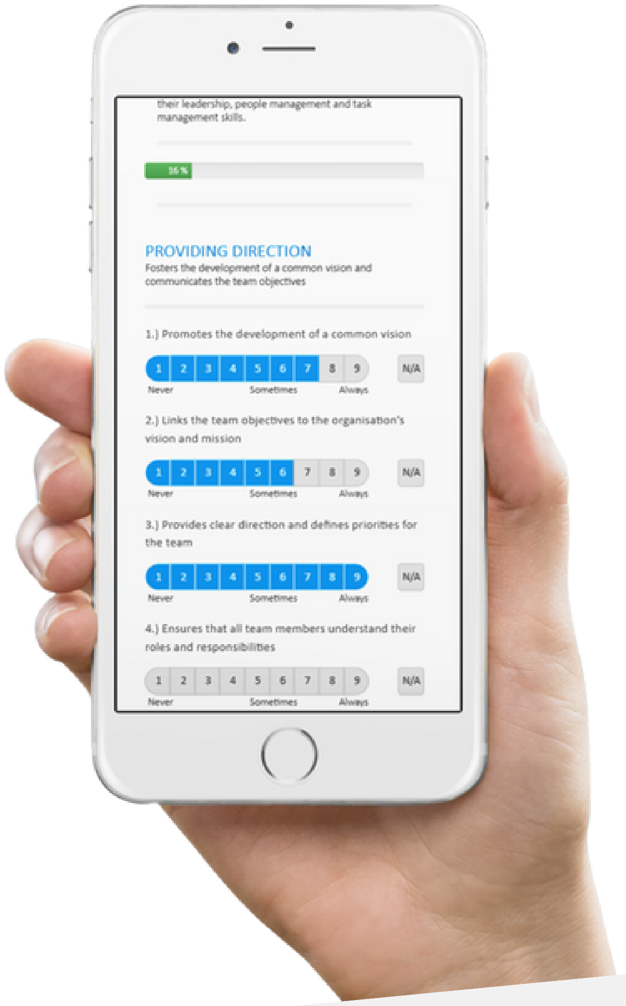


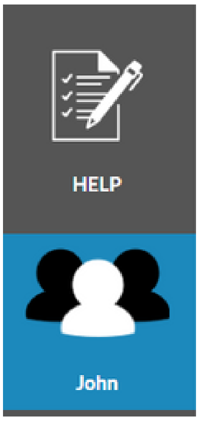
January 2023

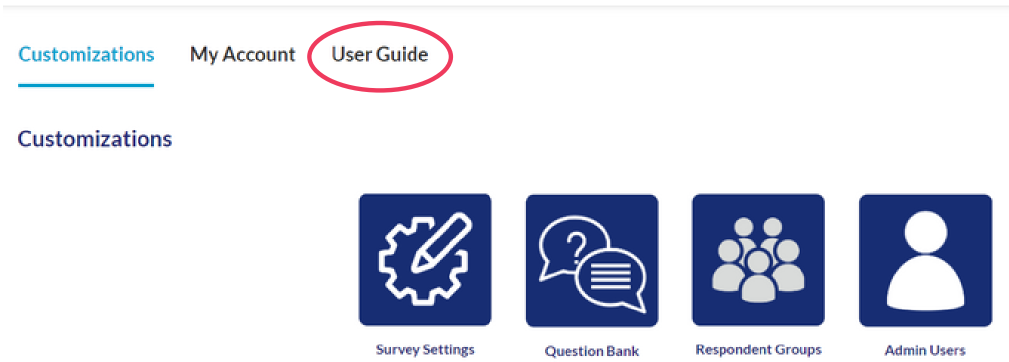
NEW UI EXPERIENCE

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

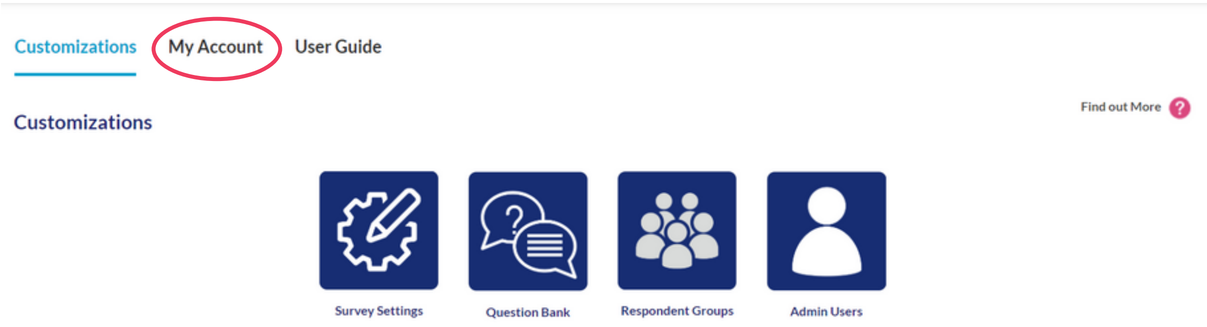
3. Enter in your Username (your registered email address)

4. Enter in your Password

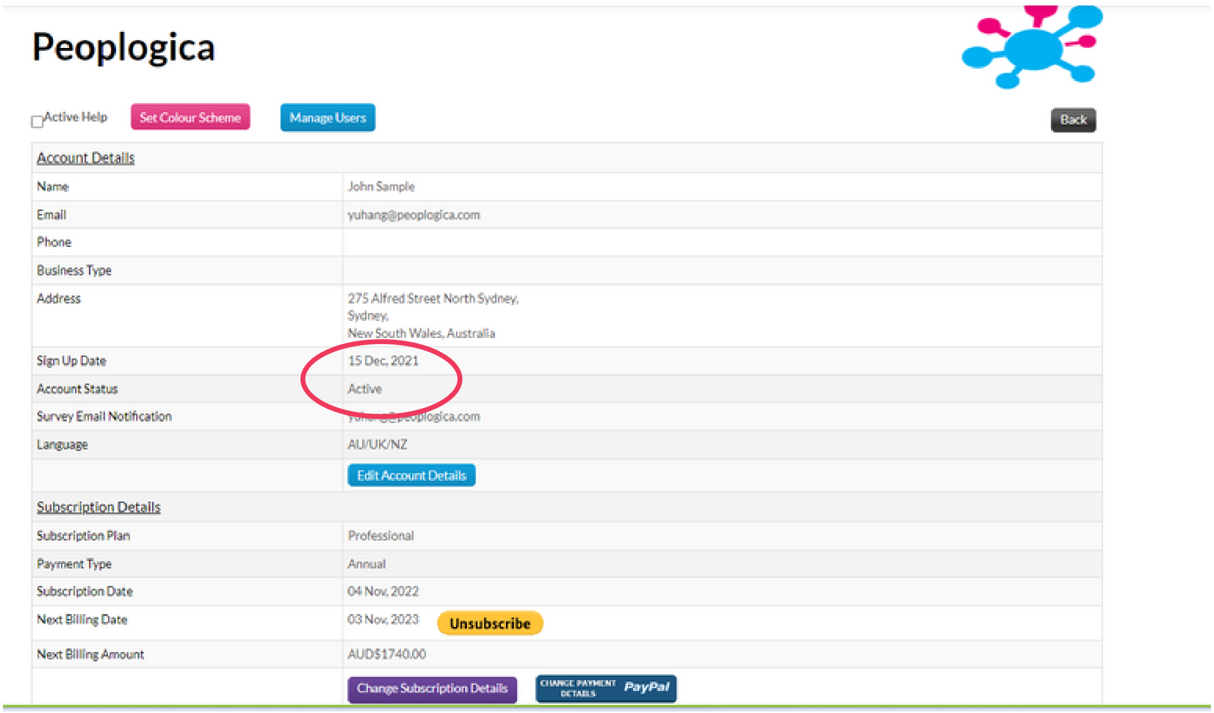
5. Click on SIGN IN

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**.

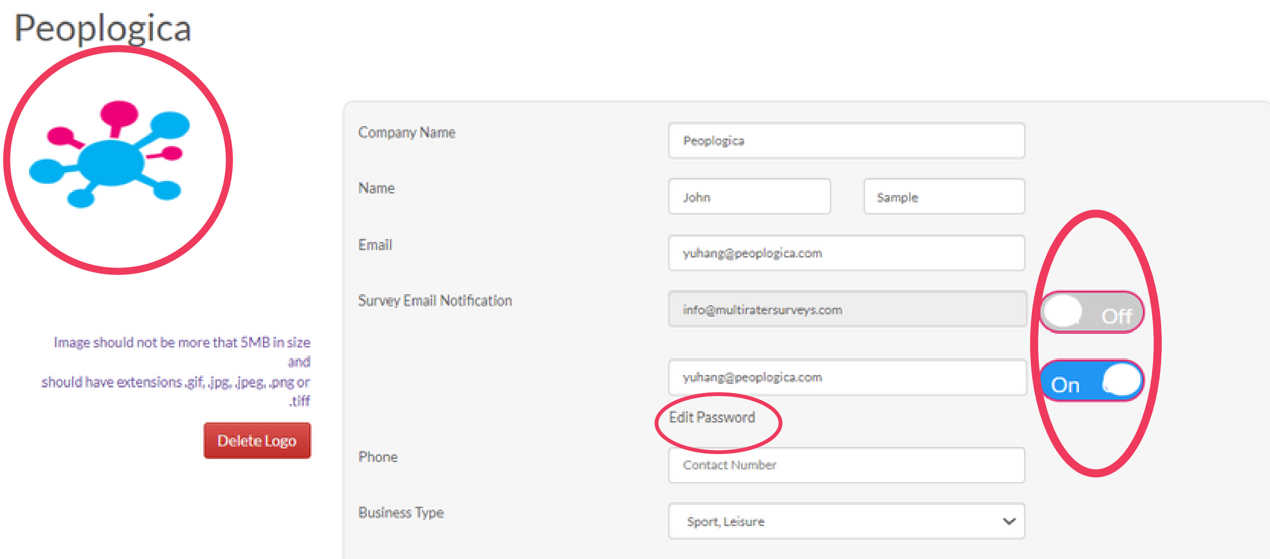


- To edit your company or personal details, or switch languages, click on **Edit Account Details**.
- To add new admin users to your account, click on **Manage Users**

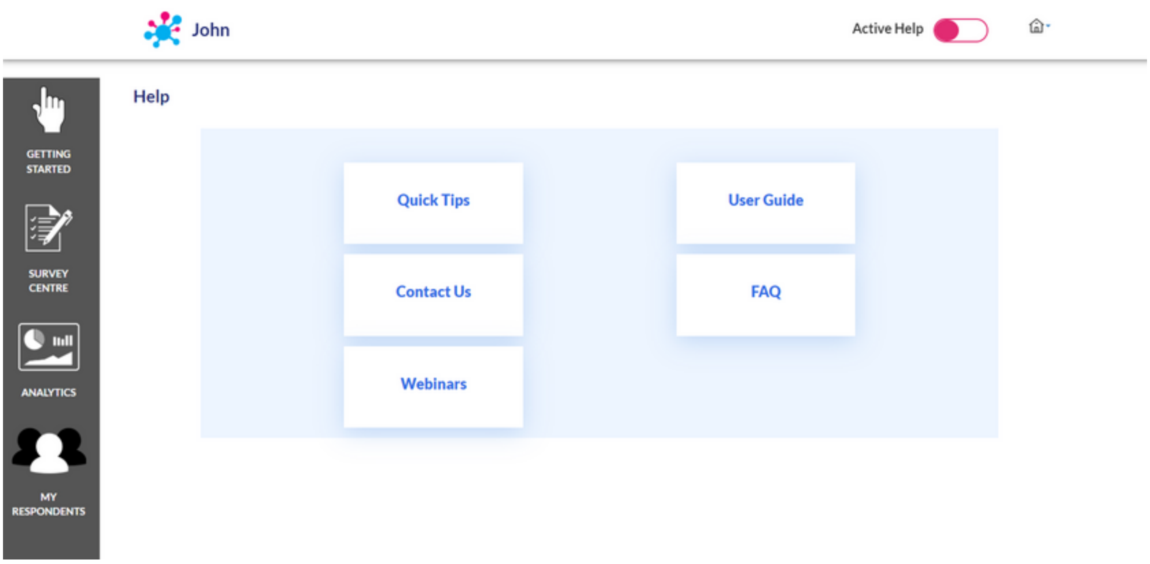


Enter the changes you wish to make.

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

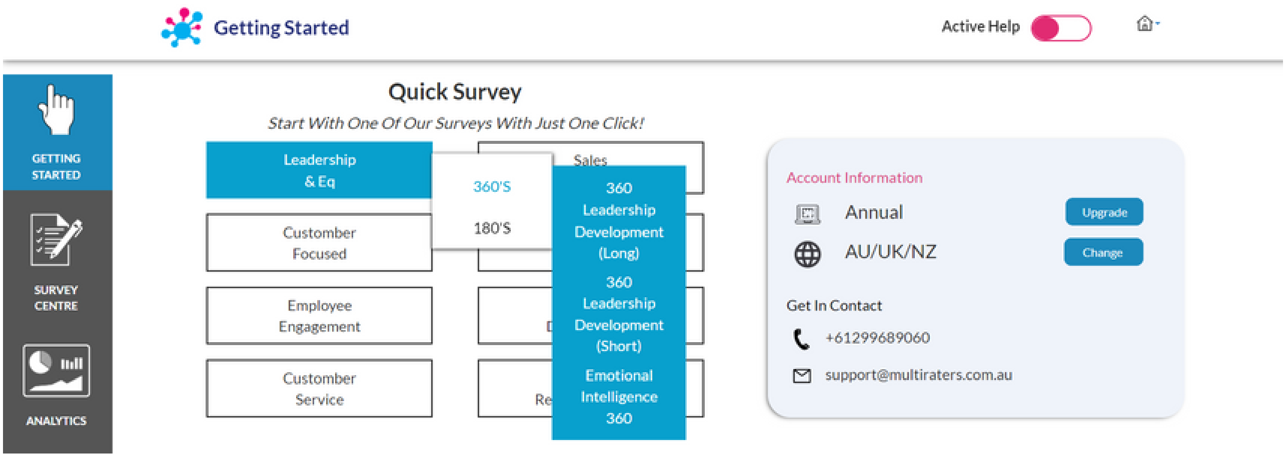


For more information, help, and overall tips on how to best utilise the platform, please head to the **HELP** tab on the bottom of the navigation panel

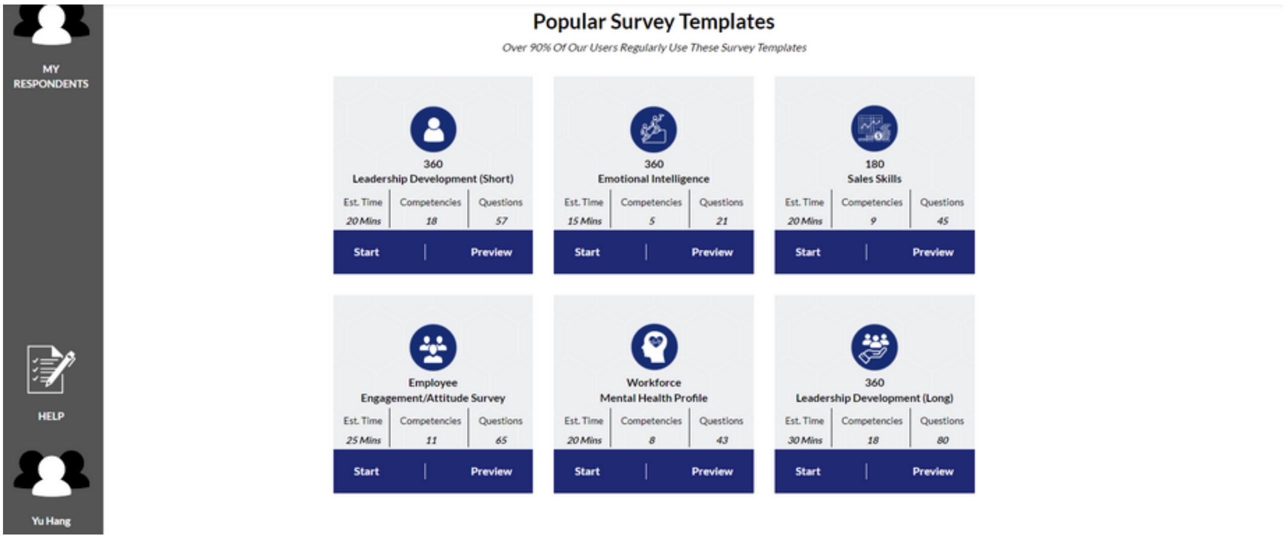


GETTING STARTED - QUICK SURVEYS

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.



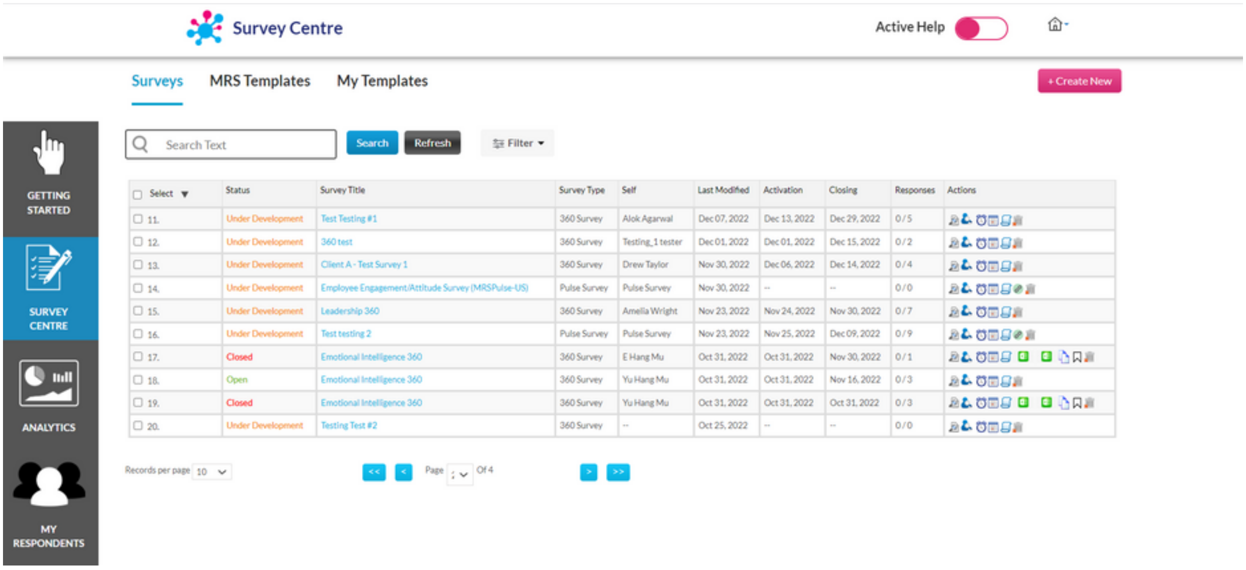
Alternatively, access MultiRater Survey's most popular survey templates (used by over 90% of our users)



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.

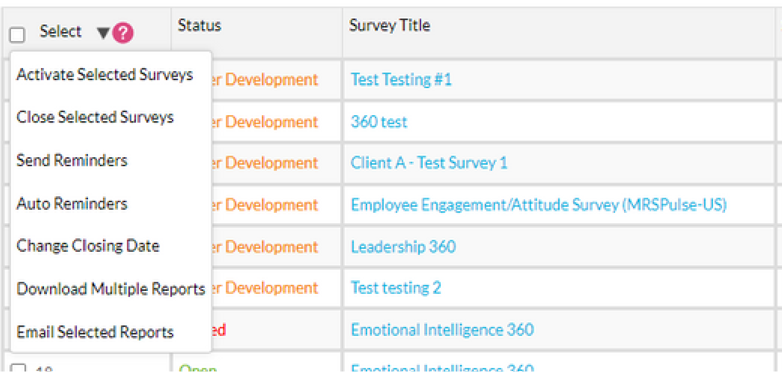


SURVEY ACTIONS

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

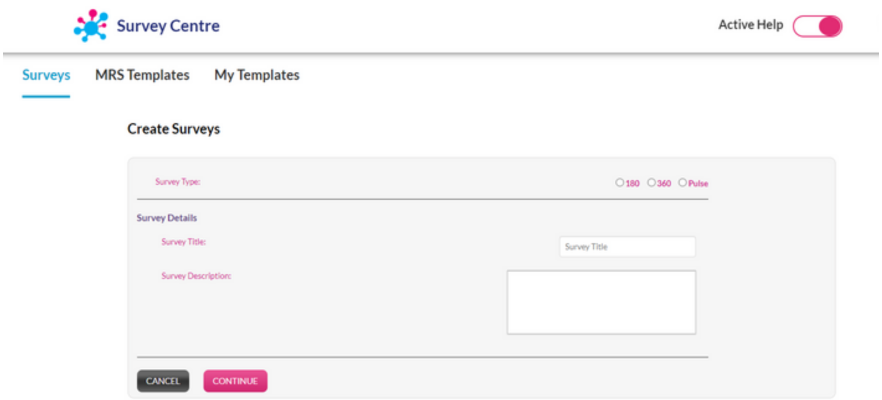
- To action on multiple surveys, select multiple surveys and hover over the drop-down



SURVEY CENTRE - CREATE YOUR OWN SURVEY FROM SCRATCH

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

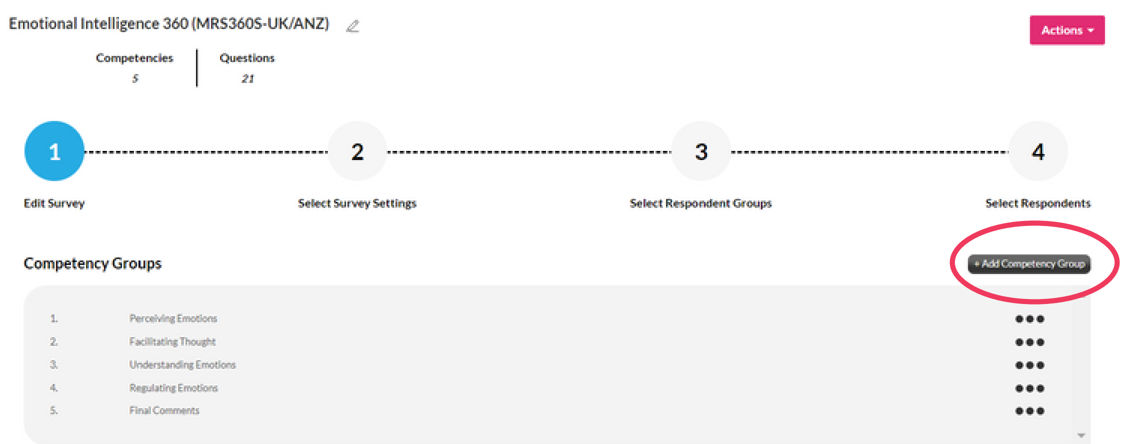
1. Click on **Create New** and you will be brought a separate page
2. Enter the name of the survey you want to create in the **Survey Title** field
3. Enter a survey description in the **Survey Description** field. This description appears at the top of each page in the online survey
   a. Select the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



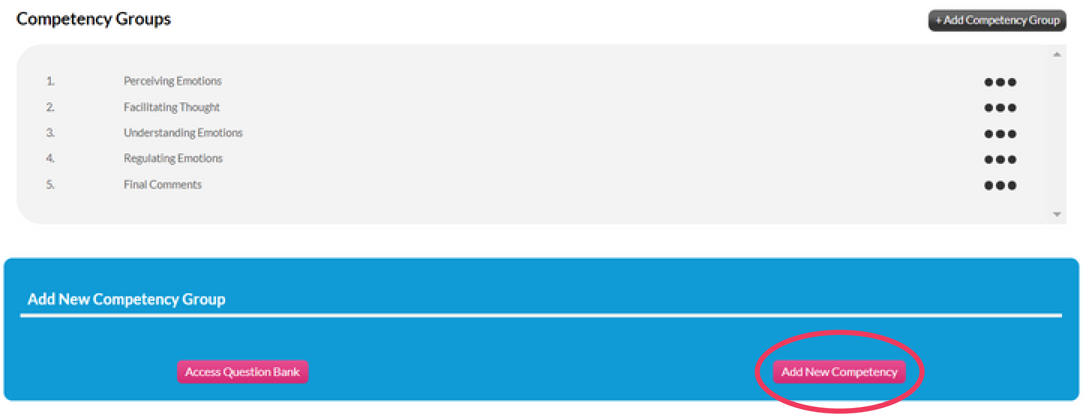
Every survey consists of four simple steps for customization:

STEP 1: Edit Survey

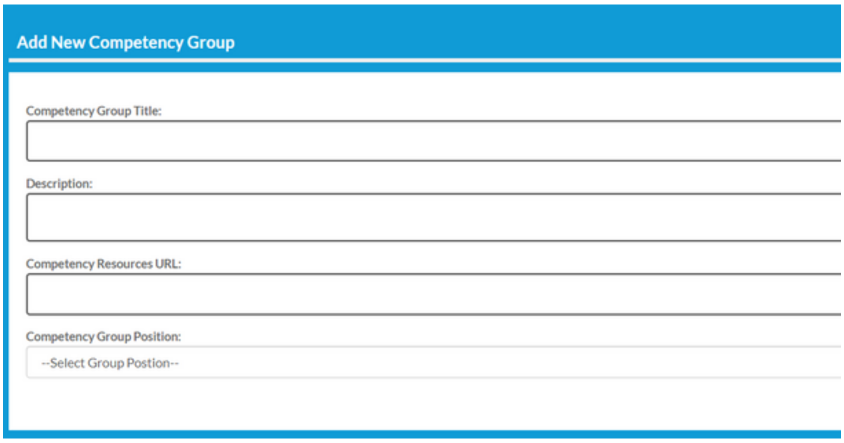
- STEP 1: Edit Survey to add and customize your survey question groups and questions.
  - To add a Competency Group, click on the **Add Competency Group** button



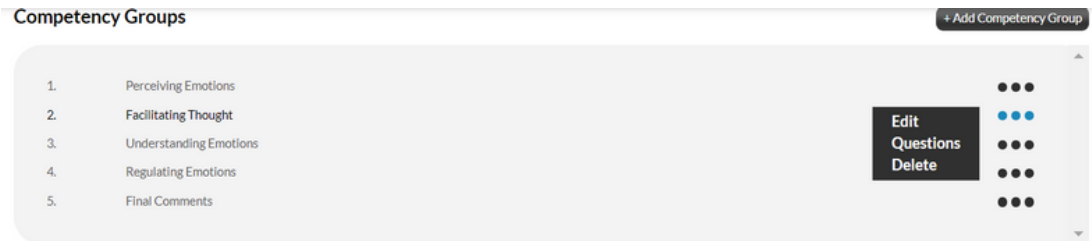
- There are two options for adding competencies, you can either select existing ones from the **Question Bank,** or create a new one by clicking **Add New Competency**



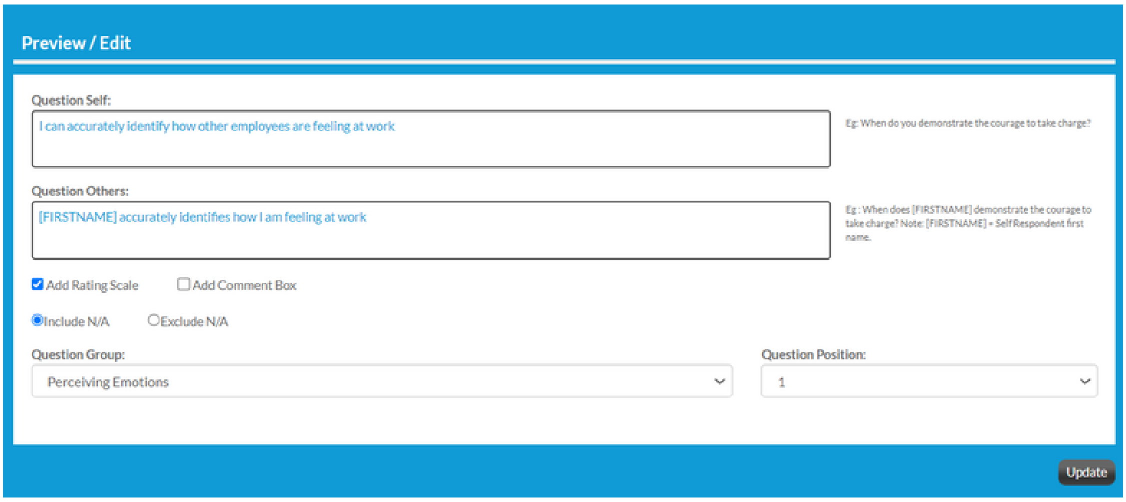
- To create an entirely new competency group, you will need to fill in the details below
  - *OPTIONAL* - if you have a designated link that has further information on your competency, please link it in **Competency Resources URL**



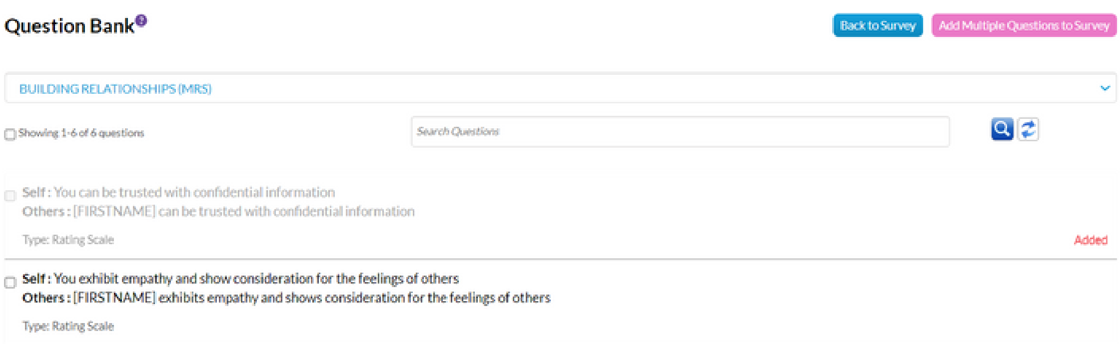
- To access the set of questions under each competency, hover over the ellipsis and click on **Questions**



- 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



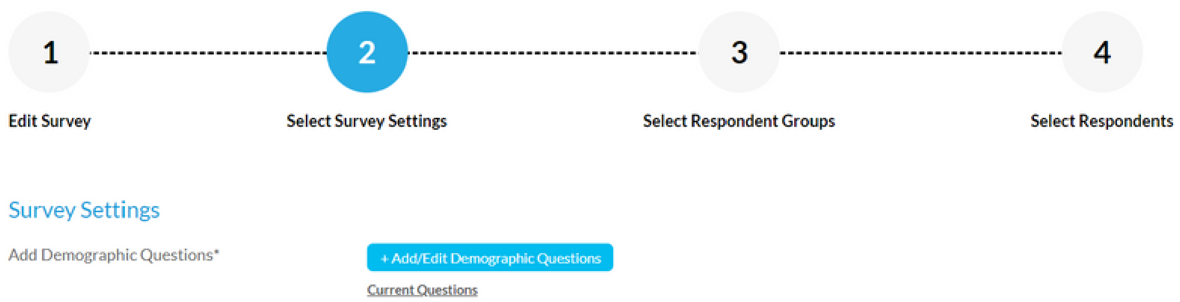
- Access Question Bank
  - Click on **Access Question Bank** to add extra pre-existing question groups and questions to your survey. These are either pre-existing question groups provided with the MRS site or those that you have previously created.
  - Select the Question Group from the dropdown menu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



- 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

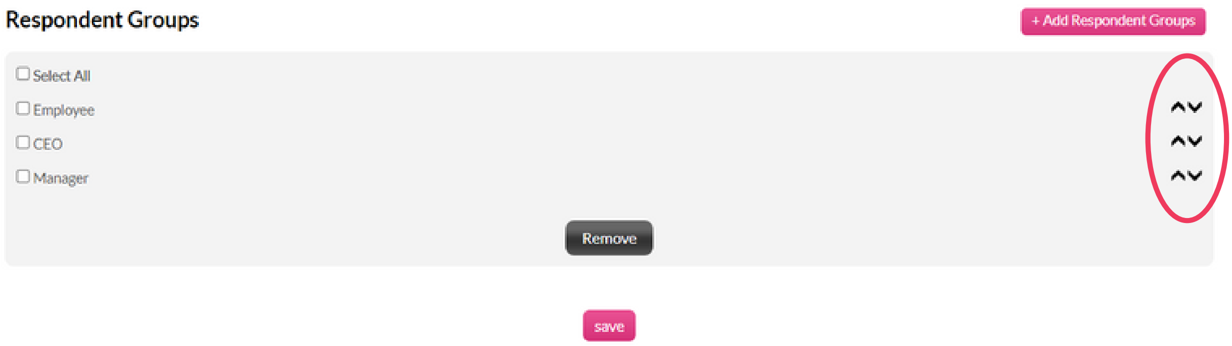
- Click on **STEP 2: Select Survey Settings** to select your survey content templates. When all content templates have been selected click on Save Settings



- 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

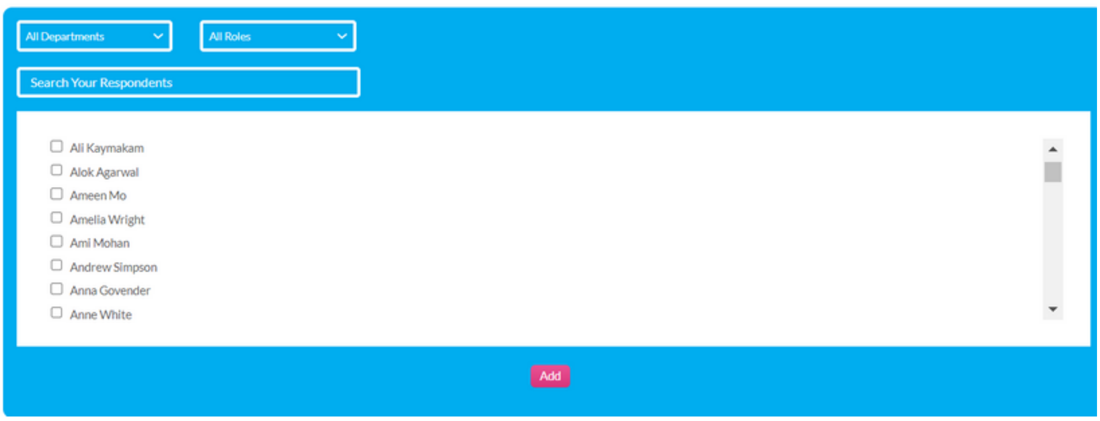
- Click on **STEP 3: Select Respondent Groups** to select the respondent groups for this survey
  - Select the respondent groups for your survey then click Add
  - You can add new respondent groups to your list by clicking **+Add Respondent**
  - Order the respondent groups in the order you would like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



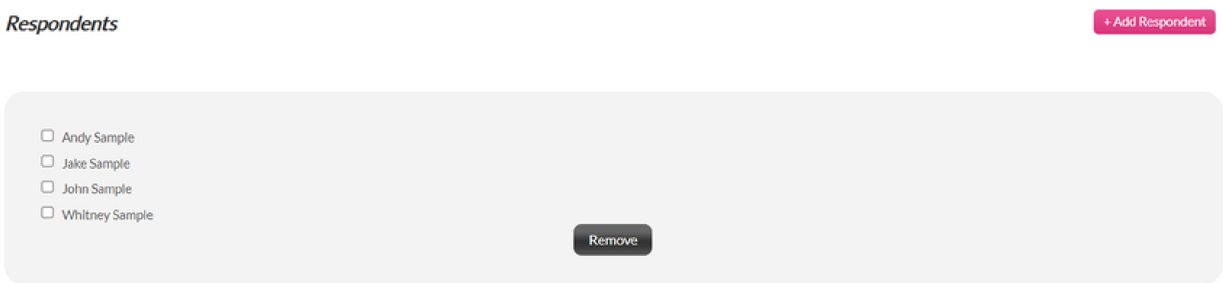
  - Click Save
  - A window will appear asking whether you wish to Save this survey as one of your templates. By saving surveys as templates, you will not have to go through the set-up process for this survey in future - all you will need to do is select the respondents.
  - To do this enter in a template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

STEP 4: Select Respondents

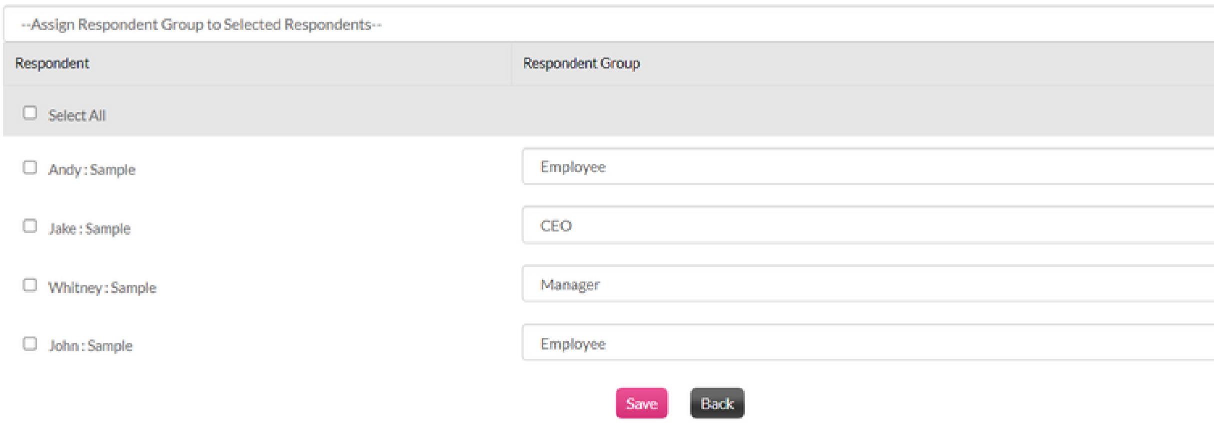
- Click on **STEP 4: Select Respondents** to select the individuals you require to complete the survey. A library of the all respondents who have been previously loaded into your site will appear



- 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

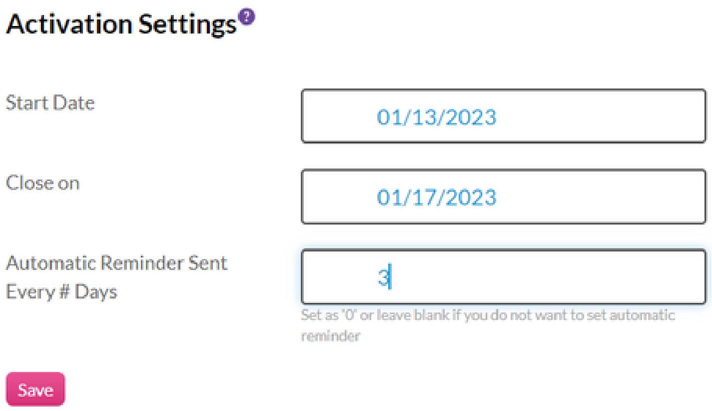


- Click Save respondents and allocate to respondent groups
- Click on the Assign Respondent Group drop down box next to each respondent name and allocate group from the respondent groups you previously selected for this survey



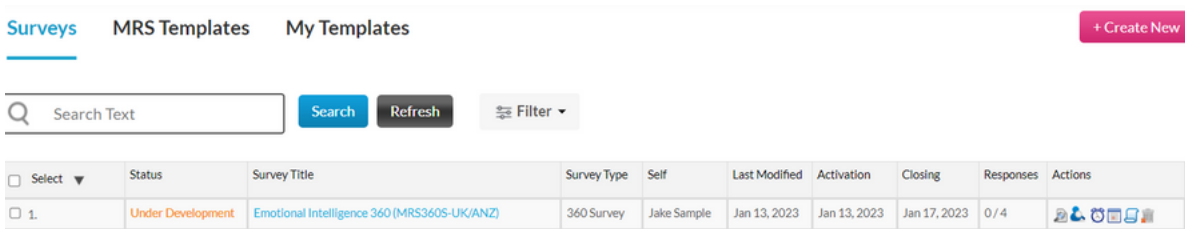
- If you have a large number of respondents (e.g. Pulse surveys), you can filter the selected respondents using the Department and Role dropdowns, then use the Assign Respondent Group to Selected Respondents dropdown to allocate all selected respondents to a respondent group
- Click Save

- 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



- 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

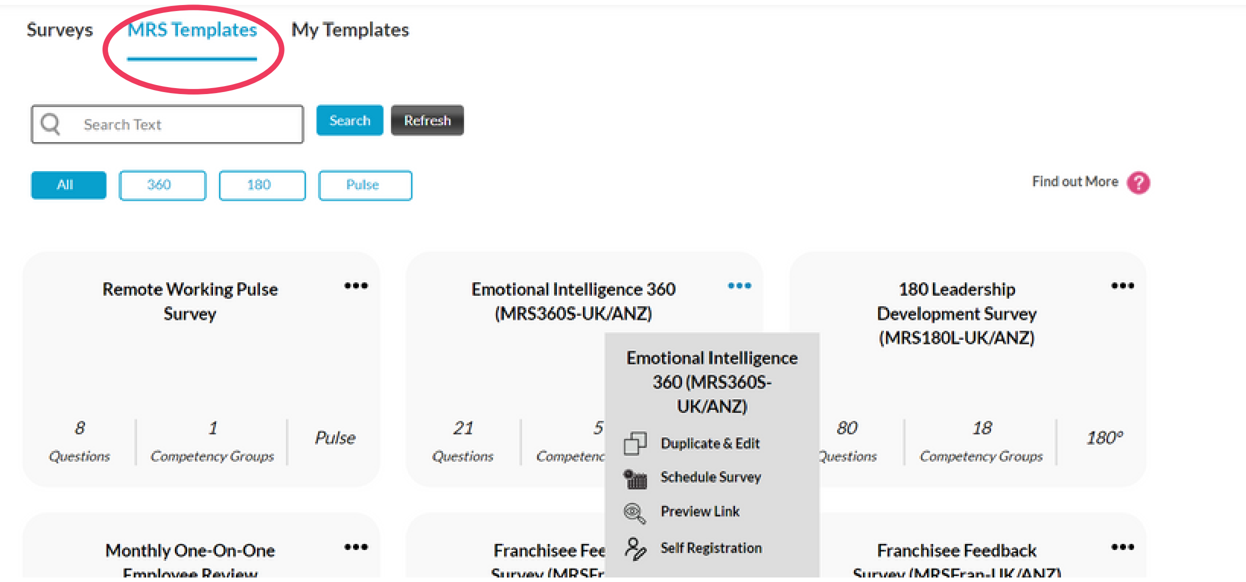
- You will be taken to the **Survey Centre.** To activate your survey and automatically send out the email invitations, tick your survey in the left column, hover over *Select*, and click "**Activate Selected Surveys"**. It will turn green, and the Status column will change to **"Open"**



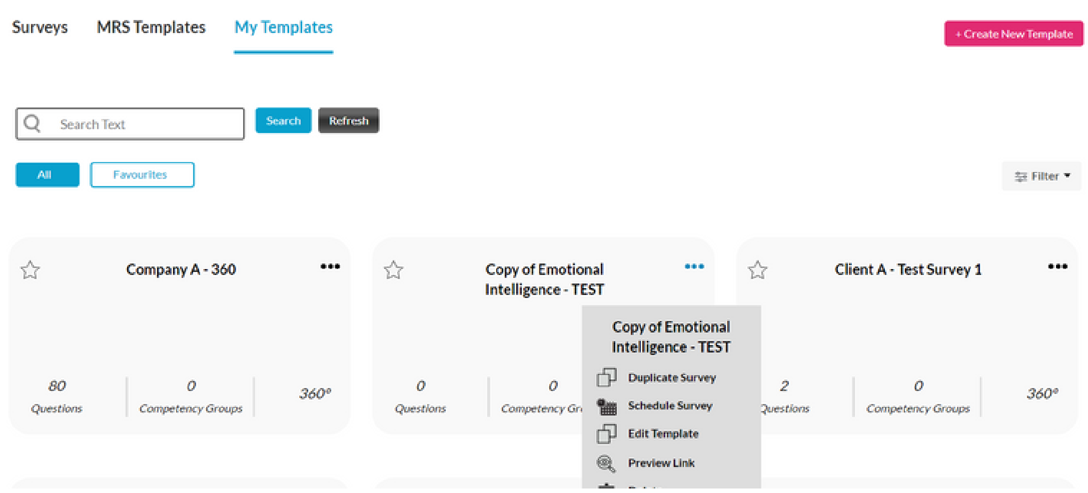
SURVEY TEMPLATES - MRS

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)

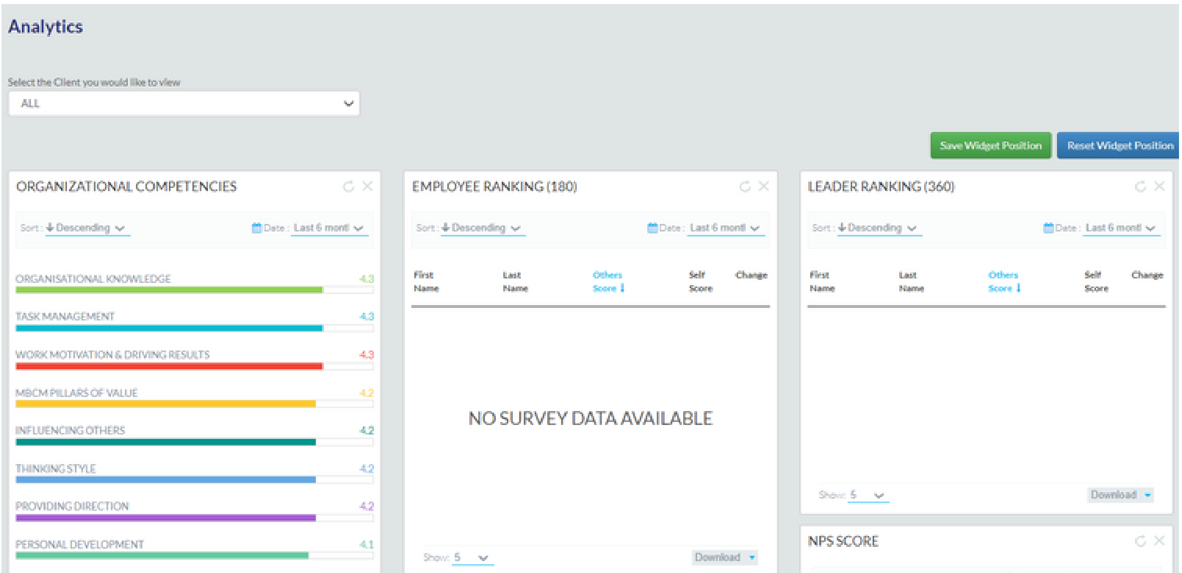


All survey templates created by you will be located in **My Templates.**



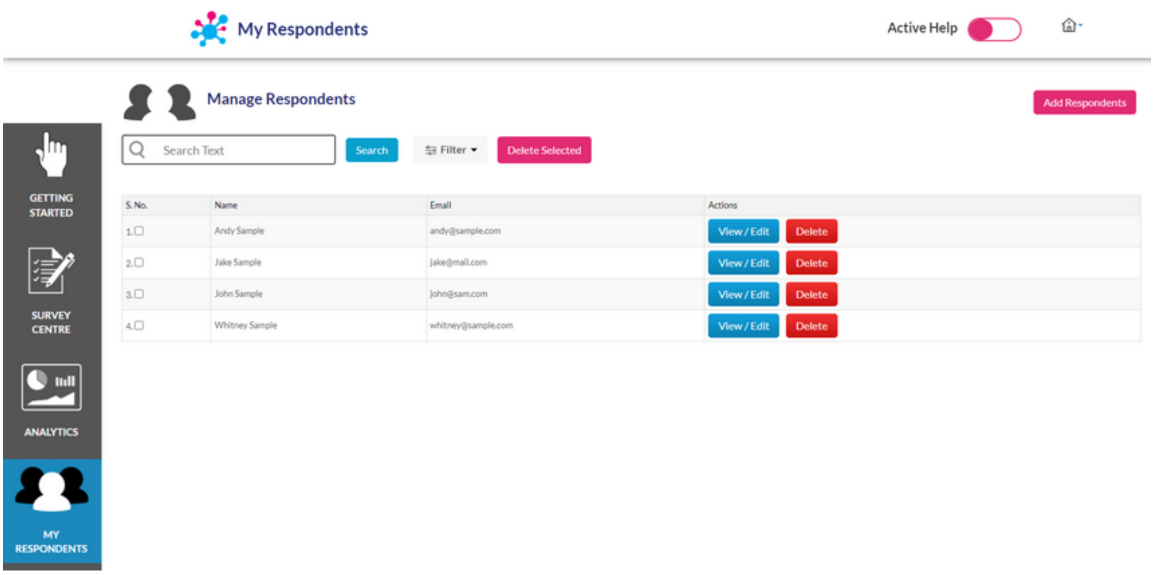
ANALYTICS

- **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.

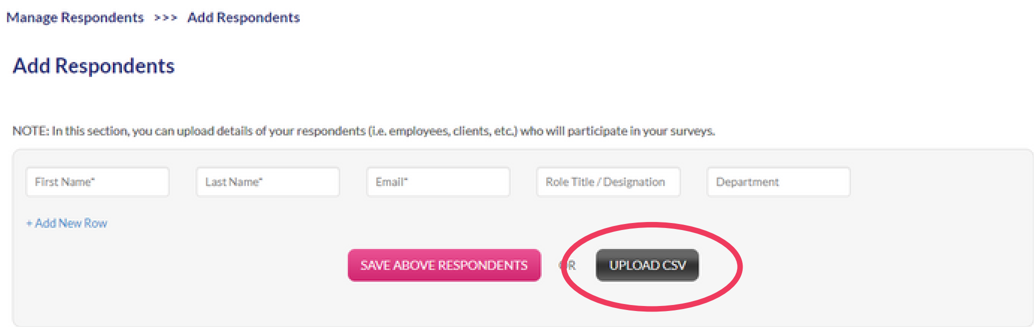


MY RESPONDENTS

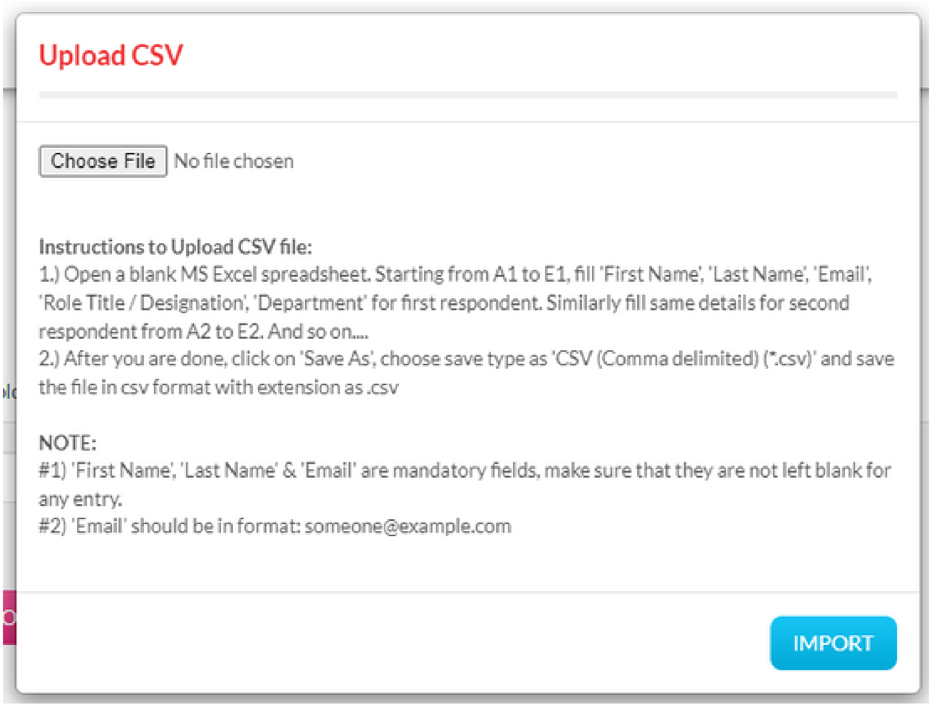
- All respondents information, across all surveys, are located in the **My Respondents** tab.



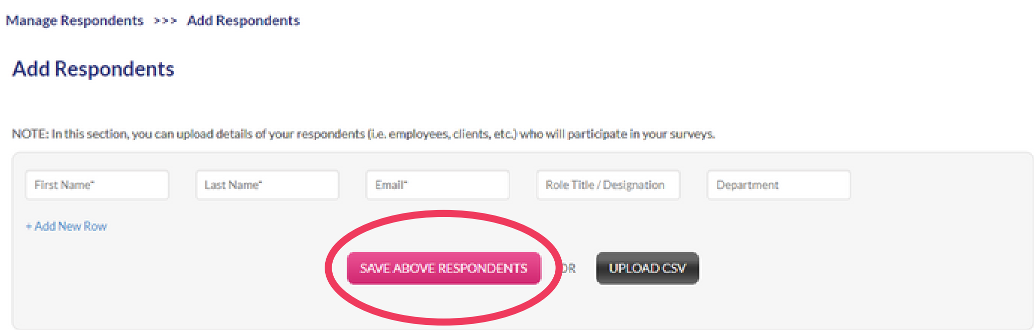
- To upload respondents, there two options available. For a large amount of respondents we recommend using the bulk upload function (Option 1). For a small amount of respondents you can simply add respondents one by one (Option 2).



  - *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*



- *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

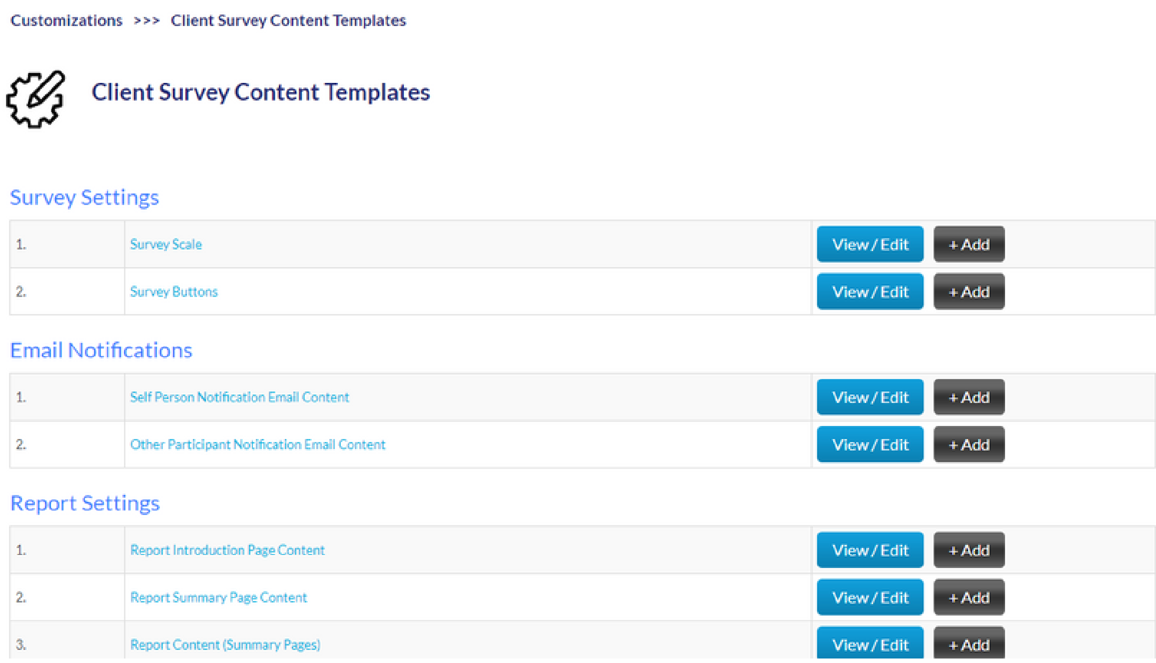


CUSTOMIZATIONS

SURVEY SETTINGS

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

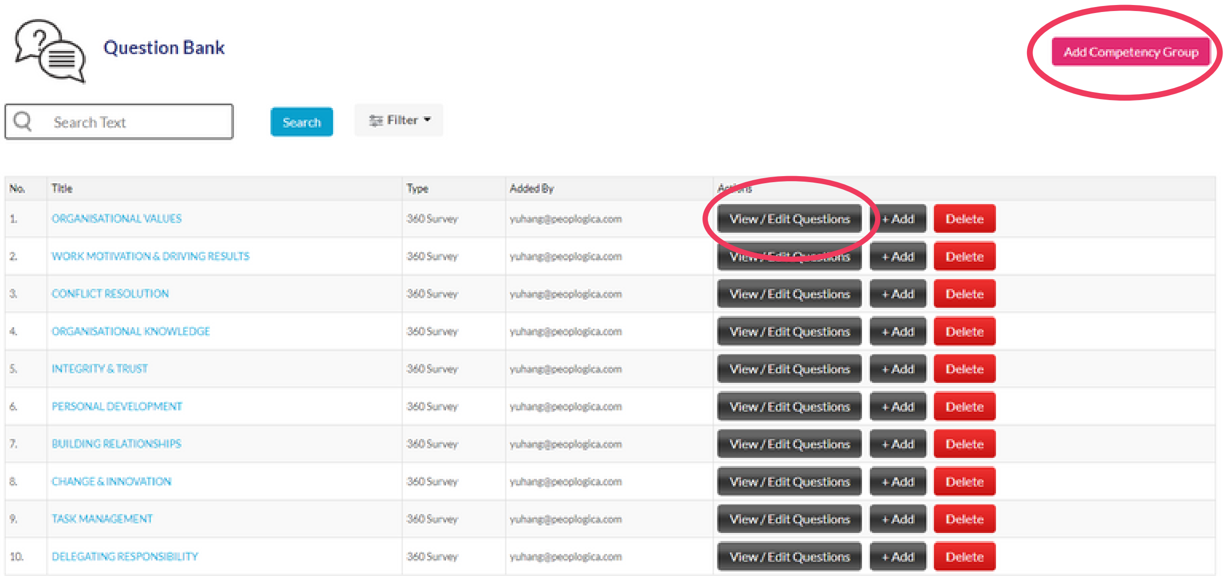
1. Scroll down and click on the tab which states the account holder's name
2. Click on **Survey Settings**. You will be taken to the Client Survey Content Templates library
3. The **Client Survey Content Template** library lists all of the templates that can be customised. Click on the View/Edit button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



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

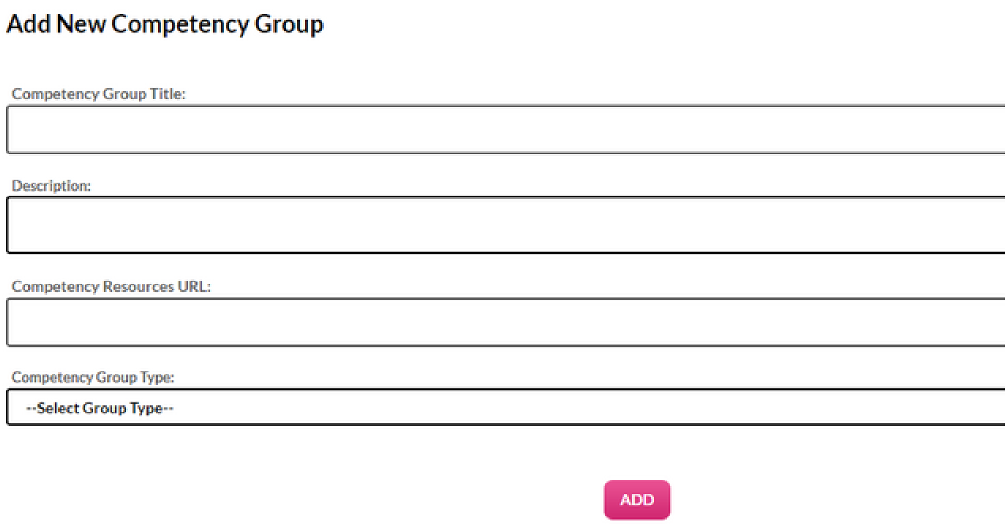
QUESTION BANK

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.

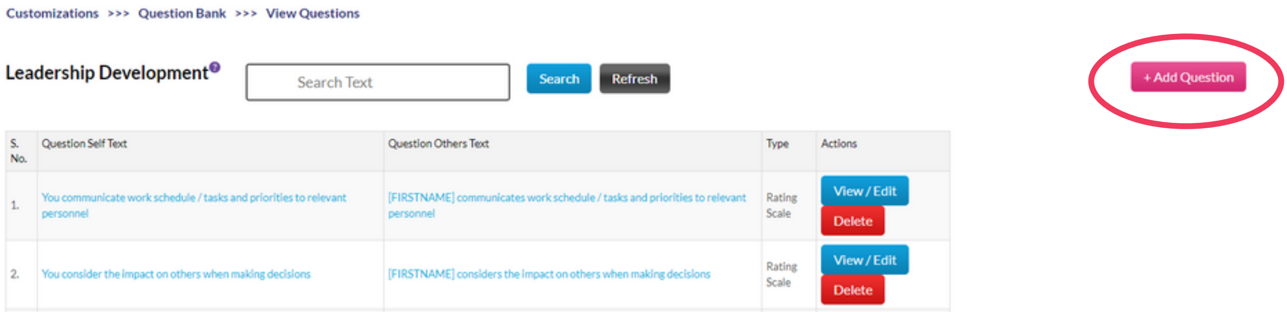


No.	Title	Type	Added By	Actions
1.	ORGANISATIONAL VALUES	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
2.	WORK MOTIVATION & DRIVING RESULTS	360 Survey	yuhang@peoplogica.com	View / Edit Questions + Add Delete
3.	CONFLICT RESOLUTION	360 Survey	yuhang@peoplogica.com	View / Edit Questions + 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

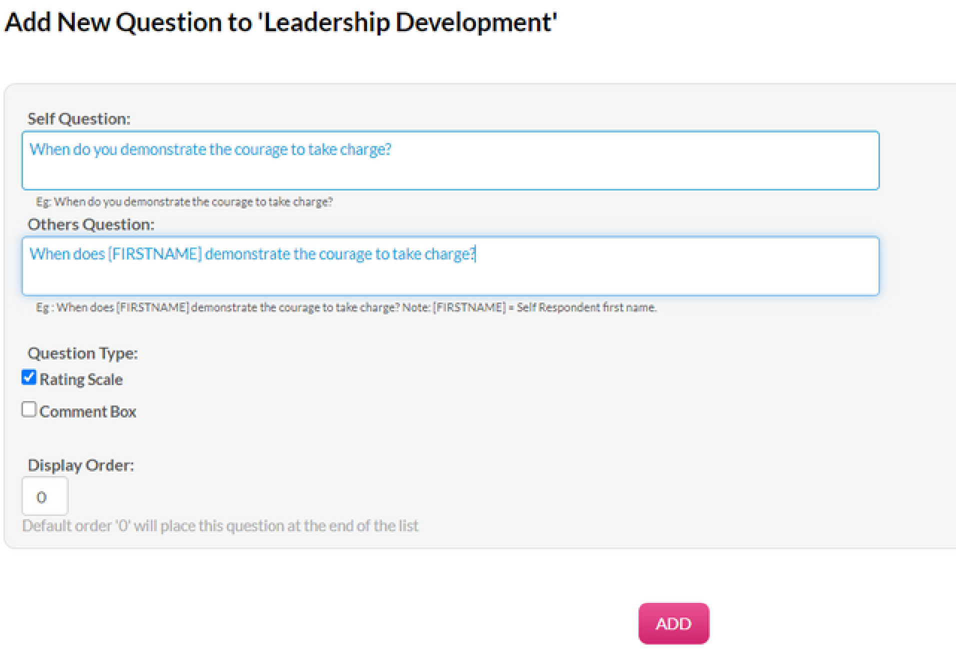
- Click on View Questions to view, edit, delete and add questions to a Competency Group
- To add a new Competency Group click + Add Competency Group. Then type in the competency title, description, competency resources URL and type of survey it will be used for (180, 360, Pulse or Open)



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



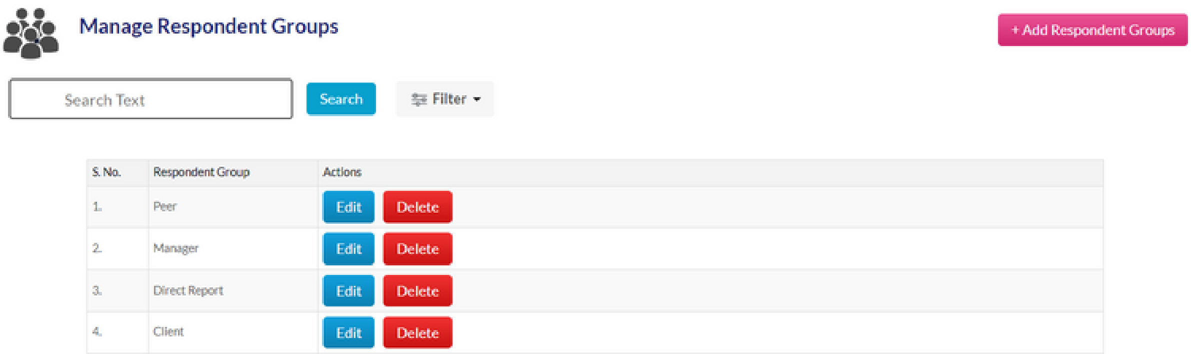
- Type in the question you want to add and select whether it is a rated question (select Rating Scale) or comment question (select Comment Box) or both



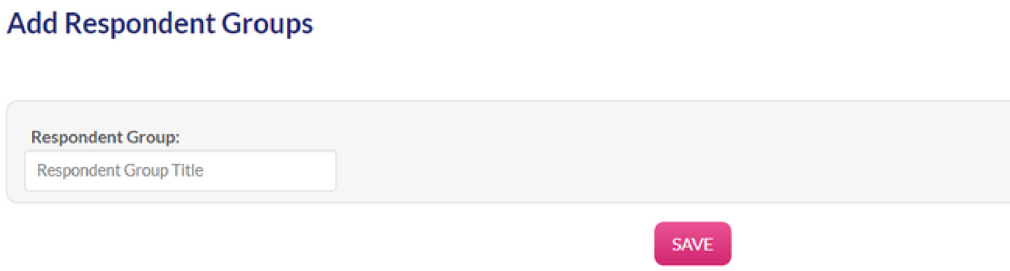
MANAGE RESPONDENTS

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.



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



- 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**