MULTIRATER SURVEYS

User **Guide**

📝 Table of Contents

📍 Note: You may click the links above to redirect you to their respective pages.

multiratersurveys.com

About MultiRater Surveys

MultiRaterSurveys is an intuitive and powerful online platform designed to simplify the process of gathering and analyzing 360-degree and 180-degree feedback and pulse surveys.

To introduce the refreshed user interface of MultiRater Surveys, we've created an updated version of our User Guide. This guide will help you make the most of our powerful survey platform. As we continue to roll out new features and improvements, we recommend always downloading the latest version to stay up-to-date.

Key Features & Benefits

- 360, 180-Degree, and Pulse Surveys Feedback
- Customizable Surveys
- Real-Time Reporting
- User-Friendly Interface
- Automated Communications
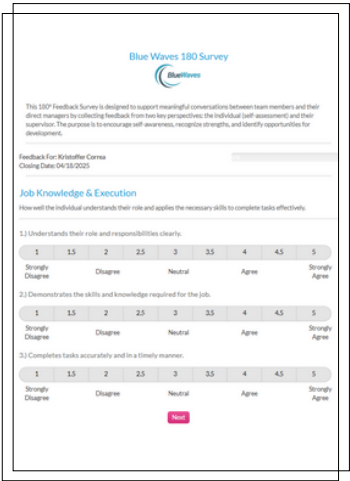- Scalable for Teams

What's New in This Version

- Revamped Dashboard
- Enhanced report visuals
- New templates and competencies
- Improved CSV upload
- Integrated notification system

System Requirements

- Modern web browser
- Internet access
- PDF reader

## Supported Browsers

- Chrome
- Firefox
- Edge
- Safari

HOW TO LOG IN?

1. Go to www.MultiRaterSurveys.com
2. Click the 'Log In' button located in the top right corner
3. Enter your Username (your registered email address)
4. Enter in your Password
5. Click SIGN IN

Navigating the MultiRater Surveys Platform

▷ Once you're in, you'll see the **Getting Started** page. From here, you can quickly deploy surveys by selecting a pre-built template. You'll also find your **Account Information** displayed on this page, and you can scroll down to explore the **Popular Survey Templates** section at the bottom.
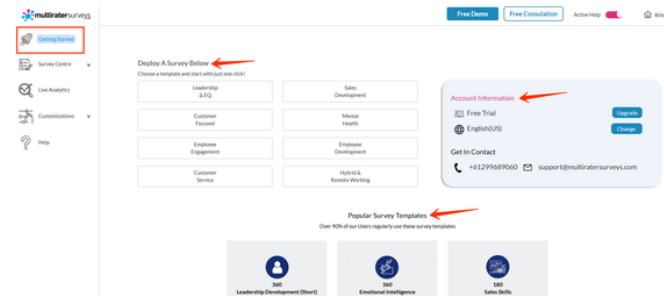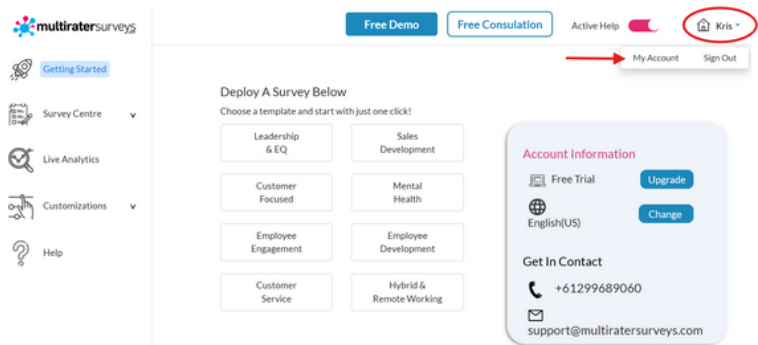

▷ You'll find the menu on the left panel, where you can access the following options:

- Getting Started
- Survey Centre
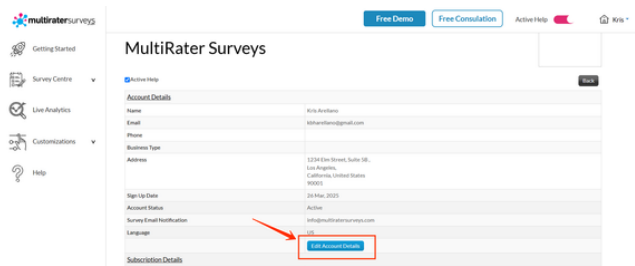- Live Analytics
- Customizations
- Help
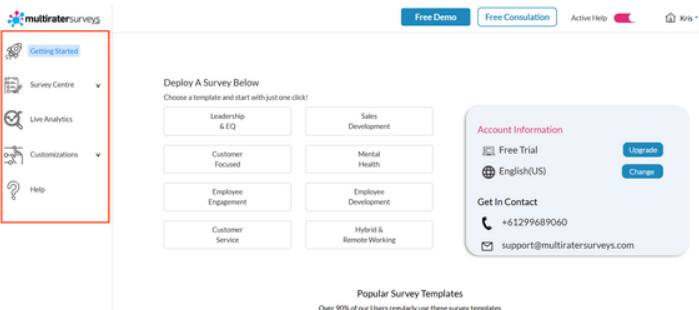
Account Set Up

To update your user information, company details, or logo at any time, go to the **My Account** page by clicking the house icon in the upper-right corner of the screen.

▷ Click the **Edit Account Details** button to edit your company or personal details or switch languages.
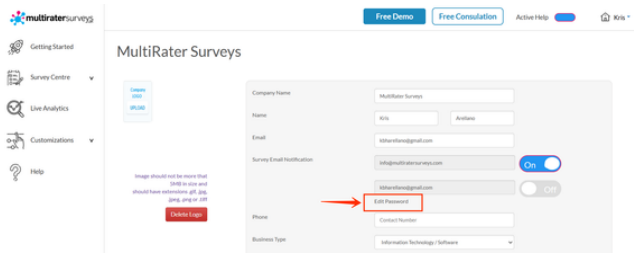

▷ Click the **Upgrade Subscription** button to choose a higher-tier plan that best suits your needs and unlock more tools and capabilities.
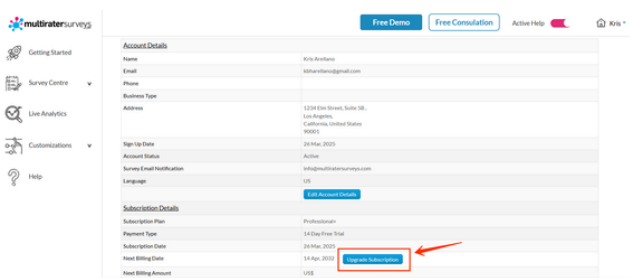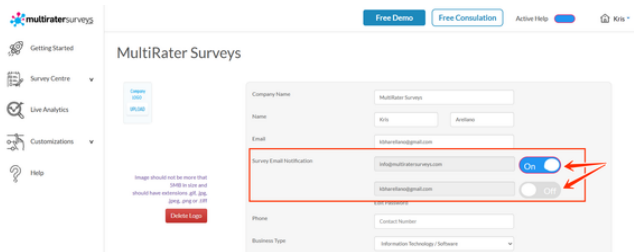
Account Set Up (cont.)

EDIT ACCOUNT DETAILS:

➤ Change your password by clicking **Edit Account Details** first, then **Edit Password,** and following the on-screen instructions.

➤ Choose the sender's email address for survey invitations by toggling the On/Off button. It would be either your account holder or MultiRater Surveys' internal email.


➤ Upload your company logo by clicking on the company logo image. This logo will appear in your online surveys and reports.
  • *Note: The logo must be no larger than 5MB and should not exceed 300 x 60 pixels in size.*
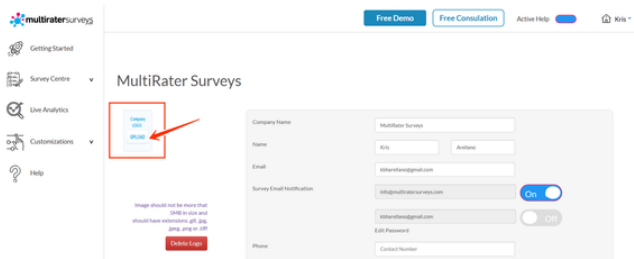
Once all your changes are complete, click **Update** at the bottom of the page to save your information.
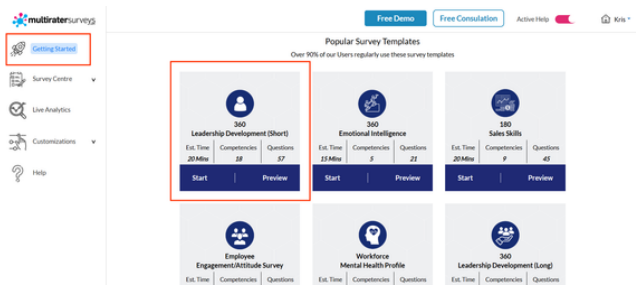
Getting Started

To start using one of our platform's built-in templates, you can just go ahead and hover over your desired survey topic and select a template that best matches your goals under the **Deploy A Survey Below** section.
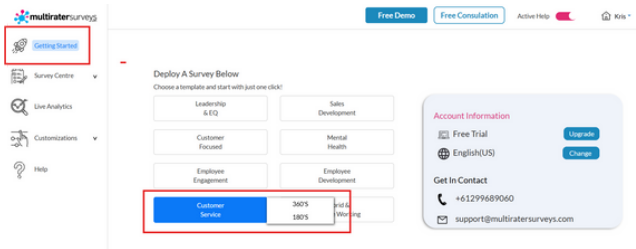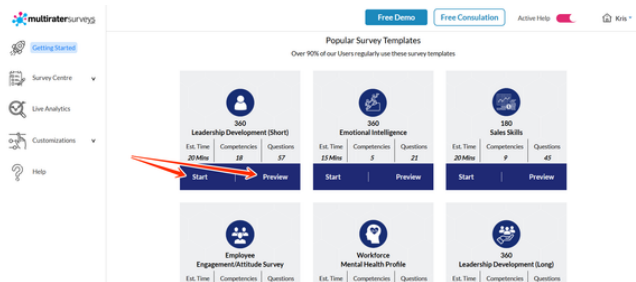

Popular Survey Templates

Alternatively, you can also explore MultiRater Surveys' most popular templates, trusted by over 90% of our users.
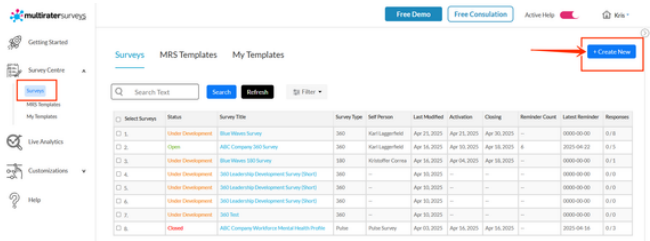

- Click **Start** to open the survey and customize it to suit your needs.
- Click **Preview** to open a pop-up window to view the survey's competencies and questions.

Survey Centre

I. Create your own survey from scratch

To start creating your own survey, click **Survey Centre** in the left-panel menu, then navigate to **Surveys**. From there, click the **Create New** button to open a new page.

1. Under the Create Surveys section, select the **Survey Type** you want to create: 180, 360, or Pulse.

2. Enter the name of your survey in the **Survey Title** field.

3. Provide a brief description in the **Survey Description** field. This will appear at the top of each page in the online survey. *Note: This is a required field.*

4. Click **Continue** to move on to the next step.
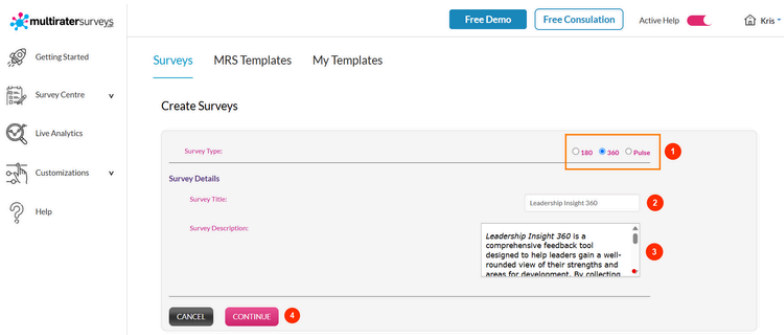
Create your own survey from scratch (cont.)

**Every survey consists of four simple steps for customization:**

STEP 1: EDIT SURVEY

Adding a Competency Group

- Click **Add Competency Group** to create a new group.
- You have two options for adding competencies:
  - Select from the **Question Bank** (existing competencies) or
 - Create a new one by clicking **Add New Competency**.
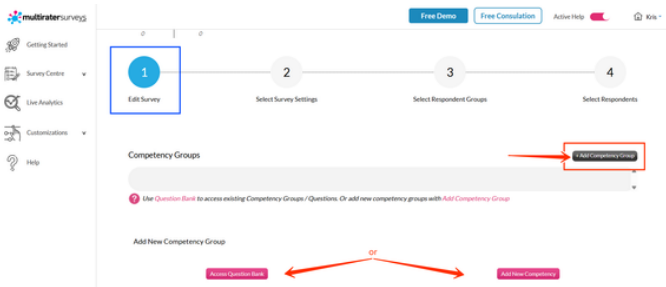
- You must fill out the required details when creating a new competency group.
  - *Optional: If you have a specific link providing more information about the competency, add it under the Competency Resources URL.*
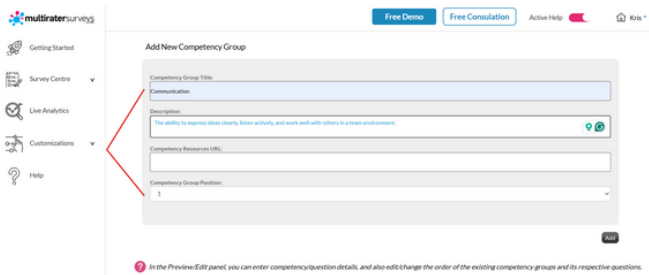
Create your own survey from scratch (cont.)

Managing Questions Within a Competency

- To view the set of questions under a competency, hover over the ellipsis icon and click **Questions**.
- To edit a question, hover over its ellipsis icon and select **Edit**.
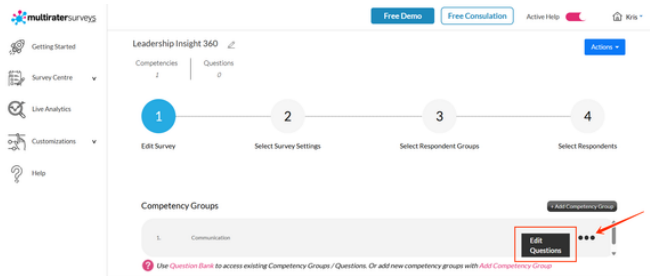
To add a new question, click **+Add Question** and complete the necessary details.

Each question includes the following configurable elements:
- Question for Self and Others
- Response type: Rating Scale, Comment Box, or both
- Whether an N/A option is available on the survey
- The Question Group it belongs to
- Its position within the Question Group
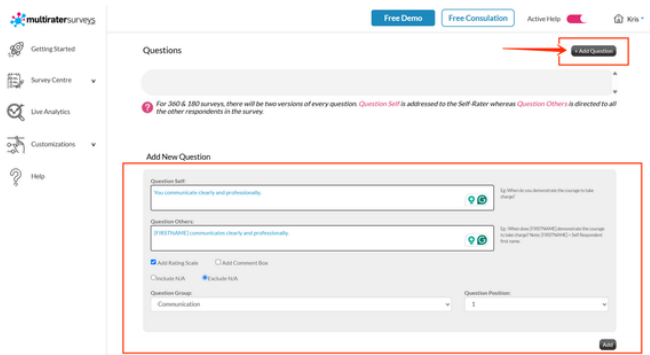
Create your own survey from scratch (cont.)

Accessing the Question Bank

Click **Access Question Bank** to add pre-existing question groups and questions to your survey. These may include standard MRS-provided groups or ones you've previously created.
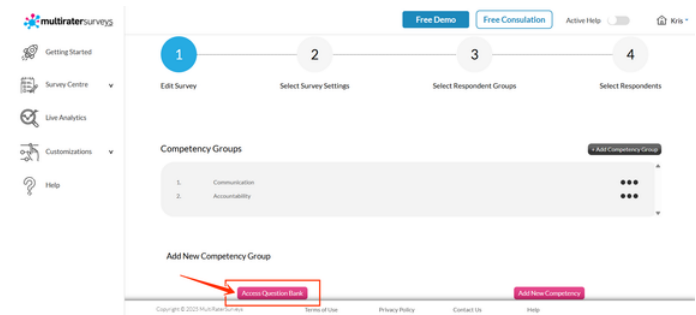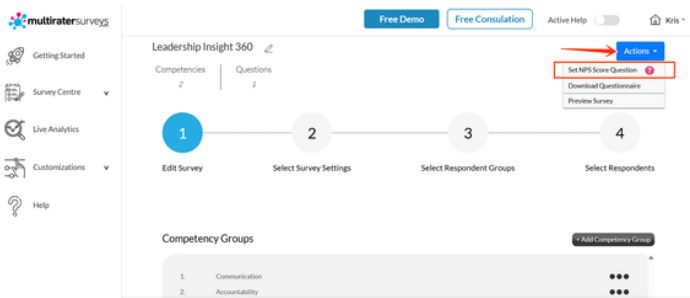

1. Select a **Question Group** from the dropdown menu.
2. Tick the boxes next to the questions you want to include.
3. Click **Add Multiple Questions to Survey** to add them.
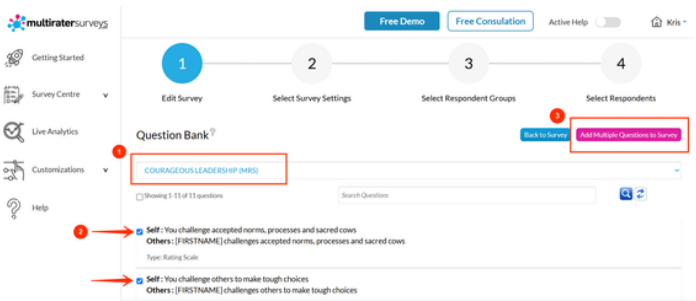
Create your own survey from scratch (cont.)

Adding an NPS® Question

To include an NPS® (Net Promoter Score) question in your survey, click **Actions** and then select **Set NPS Score Question**.

- You can choose from three pre-existing options: EmployeeNPS, ClientNPS, or LeadershipNPS.
- Select the relevant NPS question from the dropdown menu. It will automatically be added to the end of your survey.
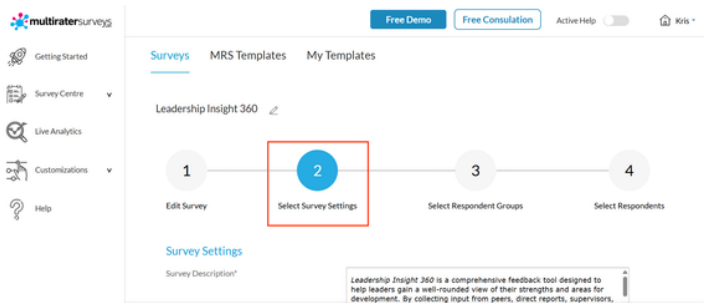
Final Steps
- Once you've completed your customizations, click **Download Questionnaire** to export your survey as a CSV file.
- To preview the survey from a respondent's perspective, click **Preview Survey**.
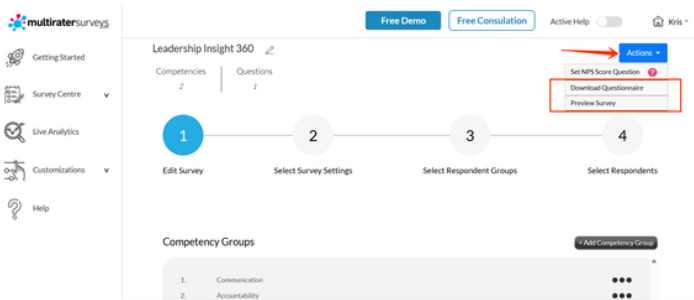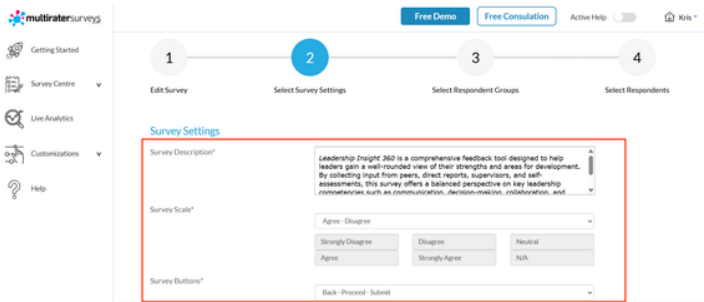
Create your own survey from scratch (cont.)

STEP 2: SELECT SURVEY SETTINGS

Click **Step 2: Survey Settings** to personalize your settings and set up notifications.

Survey Settings

- **Survey Description:** The description you entered during the creation of the survey will appear here. You can edit it directly in this field if you need to.
- **Survey Scale:** Select the type of response scale you'd like to use (e.g., Agree–Disagree, Numeric, etc.).
- **Survey Buttons:** Choose the button labels that will appear in your survey, such as Back, Proceed, and Submit.

Create your own survey from scratch (cont.)

Additional Options for Pulse Surveys:

- Add **Demographic Questions**.

- Click **+Add/Edit Demographic Questions** to include demographic questions in your survey.
    - Enter your question, set its order, and add selectable options.
    - To include more options, click **+Add New Option**.
    - Once done, click Save and return to Step 2: Survey Settings.

- Add a **Survey Open Link**.
- Customize your open survey link and click **Save** to apply the changes.

Create your own survey from scratch (cont.)

Email Notifications

- **Self Person Notification Email:** Select the type of notification email sent to the self participant from the dropdown menu.
- **Other Respondents Notification Email:** Choose the appropriate notification email template for other participants.
- **Auto-Reminder Emails:** Pick the email template to be used for automatic survey reminders.
  - *Note: If you don't select a different Auto-Reminder Email template, the system will resend the original invitation email as the reminder. However, if you choose a separate reminder template, that specific email will be sent to all participants in the exact format you've selected.*

Report Settings

- **Report Introduction Page Content:** Select the content you want to display on the report's Introduction page.
- **Report Summary Page Content:** Select the content you want to display on the report's Summary page.
- **Report Content | Self vs All (Summary):** Select the content you want to display on the report's Survey Analysis (Summary).
- **Report Content | Self vs Groups (Summary):** Select the content you want to display on the report's Survey Analysis (Summary).
- **Report Content | Self vs Groups (Detailed):** Select the content you want to display on the report's Survey Analysis (Detailed).

Create your own survey from scratch (cont.)

- **Report Comments Section Introduction Content:** Select the content you want to display on the report's Respondents' Comments (on questions) page.
- **Survey Additional Comments:** Select the content you want to display on the report's Respondents' Comments (on the whole survey) page.
- **Survey Preferred Range:** Select the Range you want to display the Survey Report.

Survey Administration Settings

- **Survey Activation Notification Email:** Select the email content that will be sent when the survey is activated.
- **Survey Completion Notification Email:** Select the email content that will be sent once all participants have completed the survey.
- **Survey Closing Notification Email:** Select the email content that will be sent when the survey officially closes.
- **Survey Report Email:** Select the email content that will be used to send the survey report links to recipients.
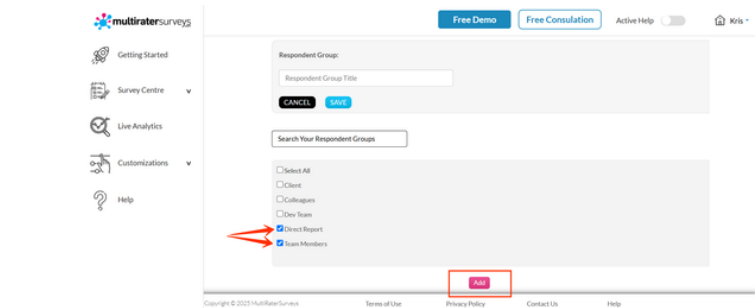
Create your own survey from scratch (cont.)

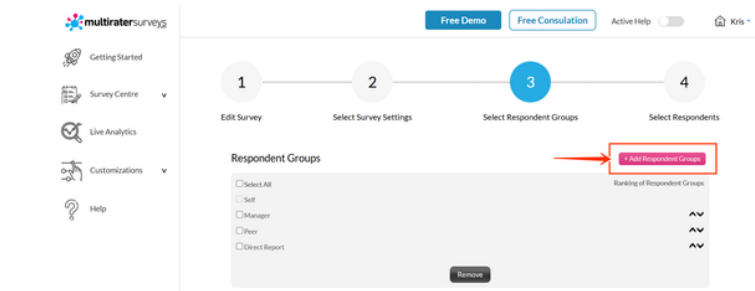### STEP 3: SELECT RESPONDENT GROUPS

Click **STEP 3: Select Respondent Groups** to choose which groups will participate in the survey.
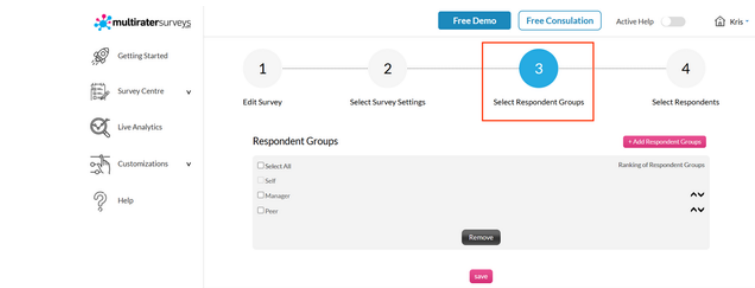
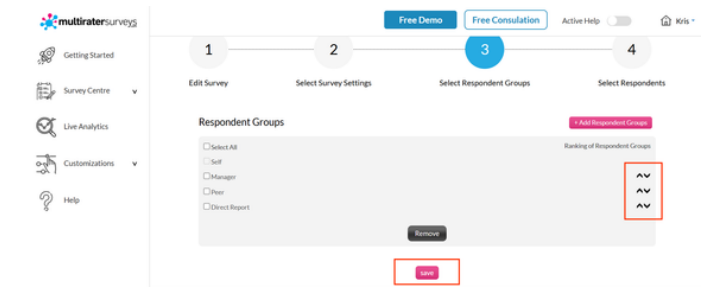- Select the desired respondent groups, then click **Add**.

- To create a new respondent group, click **+Add Respondent**.
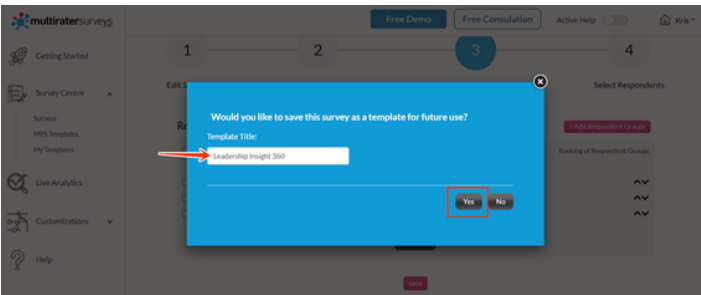
Create your own survey from scratch (cont.)

- Use the arrows next to the **Selected Respondent Groups** box to arrange the groups in your preferred order.
- Click **Save** once you're done.

A pop-up window will appear asking if you want to save this survey as a template.

Saving surveys as templates allows you to skip the setup process next time. Select your respondents, and you'll be ready to go.

To save your survey as a template, enter a name for it and click **Yes**. Your survey will then be stored in the **Template Survey library** for future use.

Create your own survey from scratch (cont.)

STEP 4: SELECT RESPONDENTS

Click **STEP 4: Select Respondents** to choose the individuals you want to complete the survey. A library of all previously loaded respondents will appear on your screen.
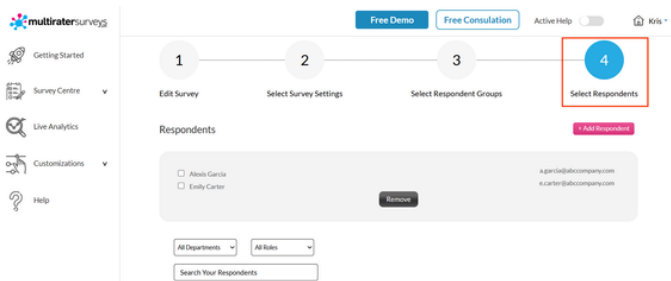
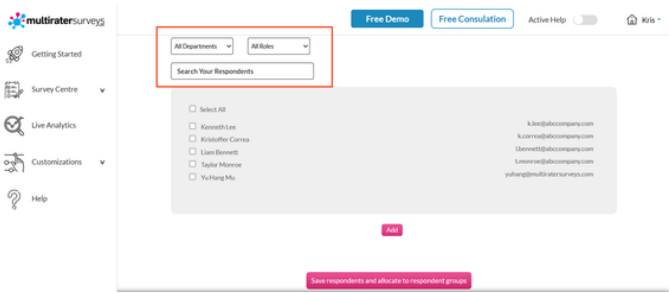- Search or scroll through the list of respondent names, then click **Add** to include them.
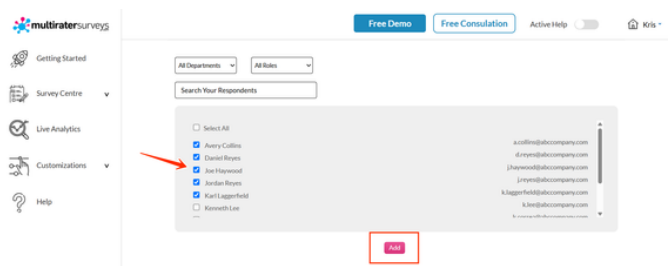
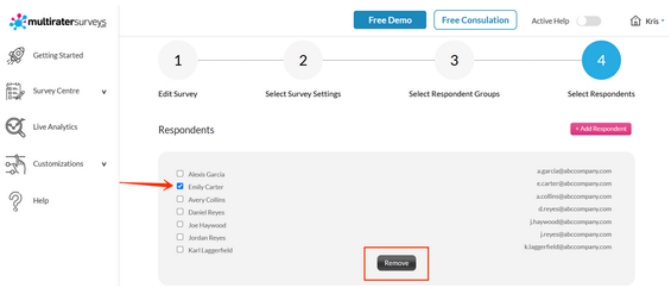- To add new respondents who aren't yet in the system, click **+Add Respondent**.
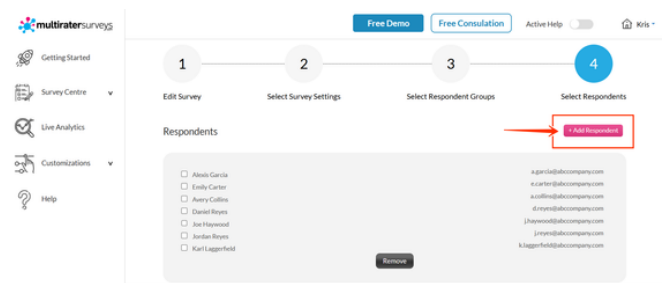
Create your own survey from scratch (cont.)

- For larger respondent groups (e.g., Pulse surveys), use the Department and/or Role filters to refine your search.

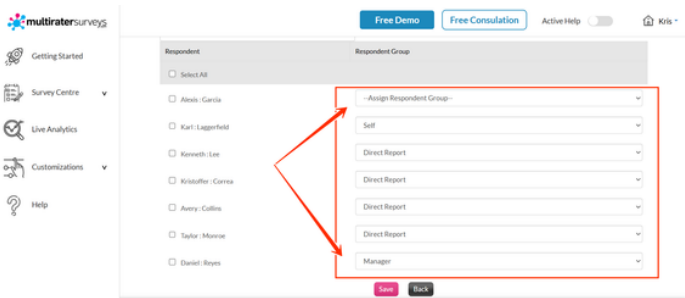- To remove a respondent from the **Your Selected Respondents** box, select their name and click Remove.

Assign Respondent Groups

Once respondents are added, click **Save respondents and allocate to respondent groups.**
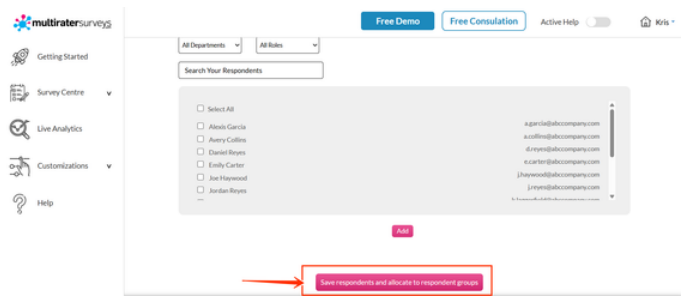
- Use the Assign Respondent Group dropdown next to each respondent's name to assign them to a group you selected earlier.

- For bulk assignments in extensive surveys, filter by Department and Role, then use the **Assign Respondent Group to Selected Respondents** dropdown to apply a group to all filtered results.
- Click **Save** once done.
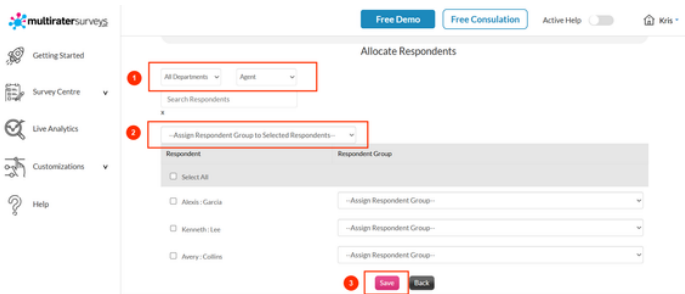
Create your own survey from scratch (cont.)

Set Activation Settings

- Select your survey's opening and closing dates and configure how often automatic reminder emails should be sent to respondents with incomplete surveys.
- Click Save to apply your settings.

Note: Surveys will not auto-activate on a future date. Instead, the system will send an email reminder to the administrator to manually activate the survey. This prevents accidental activation.

Activate Your Survey

After saving, you'll be redirected to the **Survey Centre**.
- To activate your survey and automatically send out email invitations:
   a. Tick the checkbox next to your survey in the left column.
   b. A pop-up window on the right will appear, showing different Survey Actions. Click **Activate Survey**.
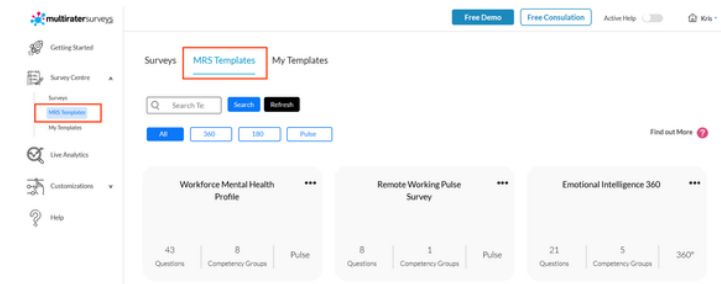   c. The row will turn green, and the Status column will update to **"Open."**
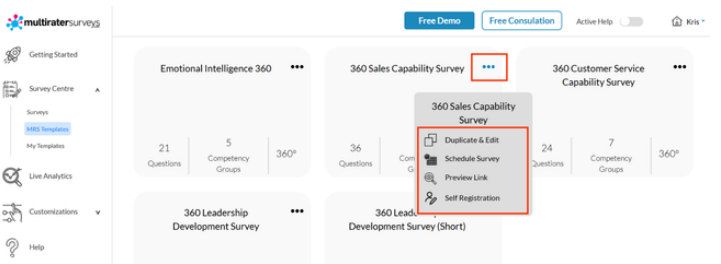
Survey Centre

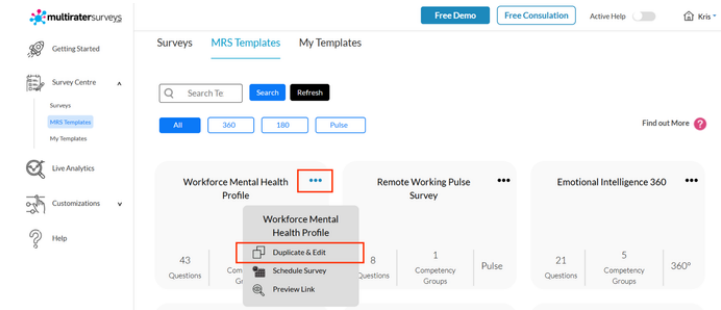## II. Create from MRS Templates

All of MultiRater Surveys' pre-built survey templates can be found under the **MRS Templates** tab under **Survey Centre**.

Each template comes with several actionable options:

- **Duplicate & Edit:** Creates a copy of the template and moves it to your My Survey Templates section, where you can customize it to fit your needs.
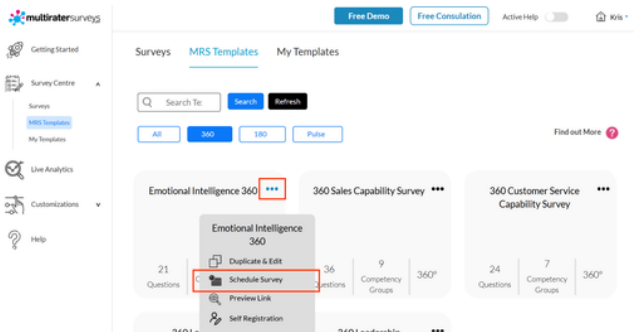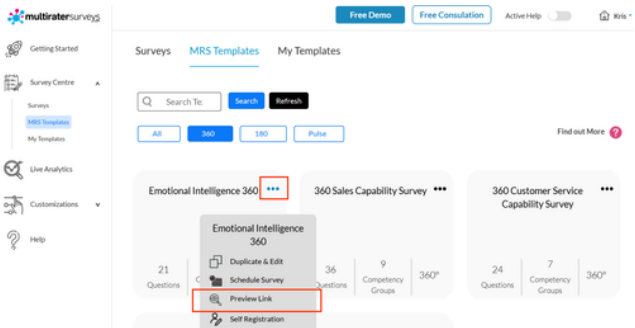
Survey Centre

Each template comes with several actionable options:

- **Schedule Surveys**: This option allows you to launch one or multiple surveys simultaneously, streamlining the bulk deployments process. This is especially useful for large-scale feedback initiatives across teams or departments.

  There are two available CSV templates you can use, depending on the type of survey you're running:
  - **360 Multiple Upload Template** – For launching multiple 360-degree surveys simultaneously
  - **180 Multiple Upload Template** – For launching multiple 180-degree surveys

  *Tip: Prepare your respondents using the appropriate template before uploading them. See the **Resources** section at the end of this guide to access sample CSV files, which you can download.*

- **Preview Link:** Generates a shareable link, allowing stakeholders to preview the survey.

Survey Centre

**Each template comes with several actionable options:**

- **Self-Registration:** This feature is available exclusively for 360-degree surveys. It allows participants to enter their information and nominate respondents directly, reducing admin workload and giving participants more control over their feedback circle.

  There are two ways to use this feature:

  - **Option 1: Upload CSV File**
    - Click the upload icon to submit a CSV file containing participant details and their nominated respondents.

  - **Option 2: Copy Link**
    - Generate and copy the self-registration link, then share it manually with participants.
    - Example: https://www.multiratersurveys.com/self-reg/?client_id=32303736&tempid=32373532

  Participants receiving the link can register themselves and enter their respondent details directly via the platform.
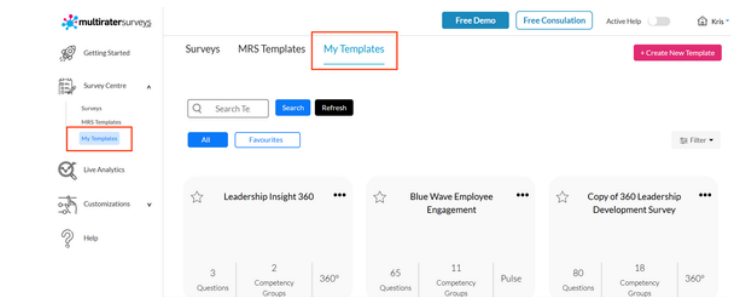
  Note: This feature is ideal when you want participants to take ownership of the process or when you're working with distributed teams.
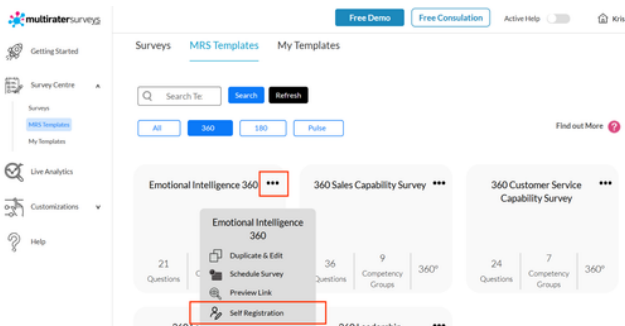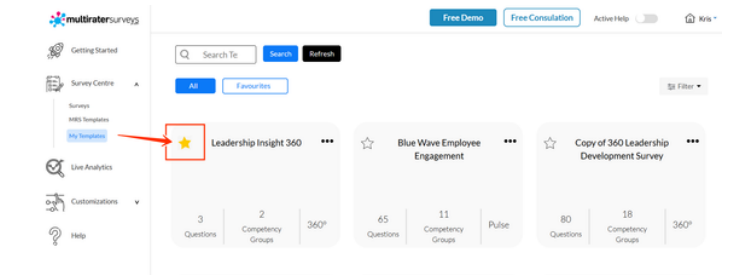
Survey Centre
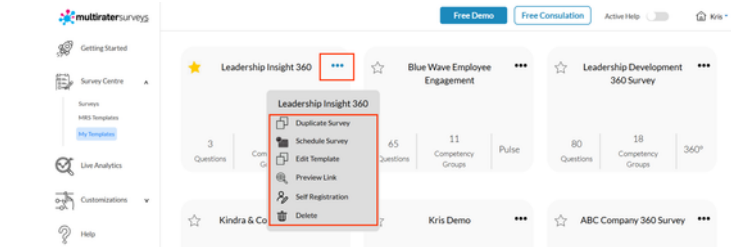
III. Create from My Templates

All survey templates you've created are stored under the **My Templates** tab.

- Mark templates as favorites by clicking the star icon.

- To manage your templates, click the ellipsis (…) on a specific survey to:
  - Duplicate Survey
  - Schedule Survey
  - Edit Template
  - Preview Link
 - Delete Survey

multiratersurveys

Live Analytics

The **Analytics** section provides a snapshot of your organization, offering valuable insights into strengths and areas for improvement:
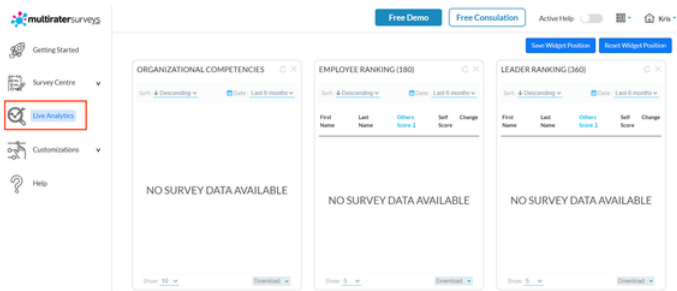

- **Organizational Competencies:** This graph highlights the highest and lowest-rated competencies across all surveys.

- **Employee & Leader Rankings:**
    - Employee Ranking (180) and Leader Ranking (360) display your top and bottom-performing individuals.
    - The ranking is based on aggregated feedback from their peers, direct reports, and supervisors across various leadership competencies.
    - It offers a quick, at-a-glance view of your top-performing leaders and employees who may need further development, helping you identify high-potential individuals and areas where additional support or development may be required.
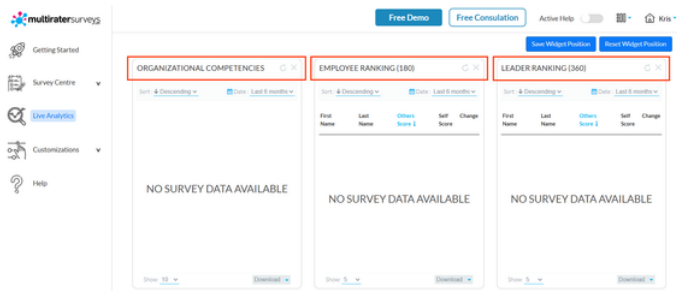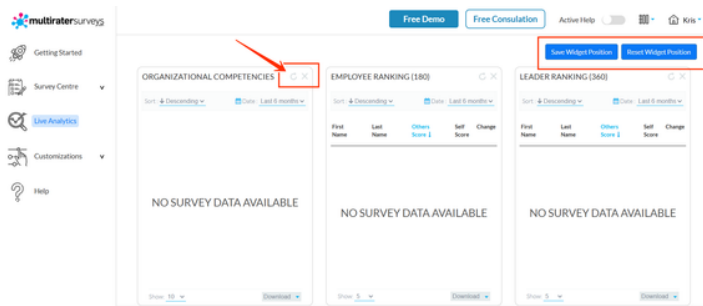
Live Analytics

- **Active Surveys:** Keep track of all currently active surveys within your organization.

- **NPS Scores:** View Net Promoter Scores for Client, Leadership, and Employee surveys.
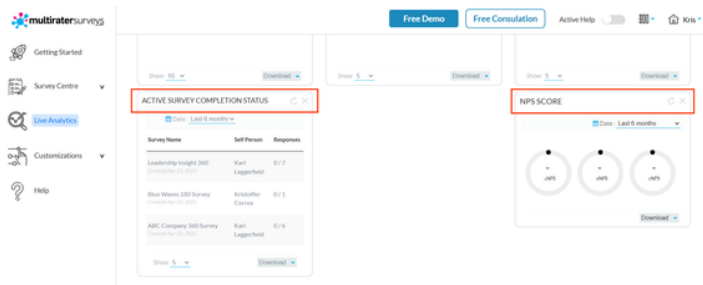
You can customize the Performance Monitor Dashboard by clicking on Widgets or Layout at the top of the page to manage what data is displayed and how it's organized.
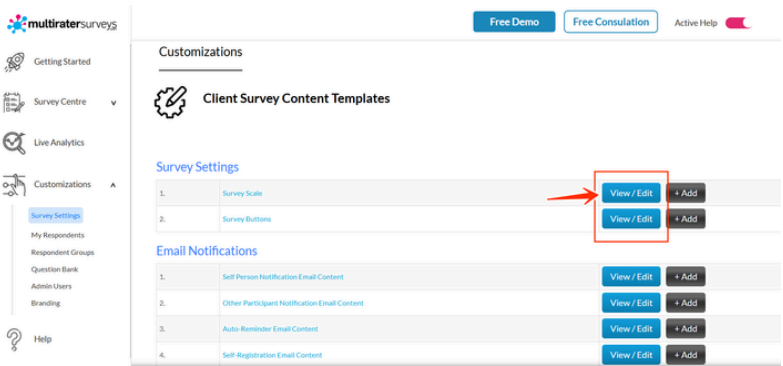
Survey Settings

Survey Settings allows you to customize key elements of your surveys, including scales, buttons, email notifications, and report settings. From this page, you can view or edit your current configurations and notification templates and create your own custom survey scales, button labels, and notification settings.
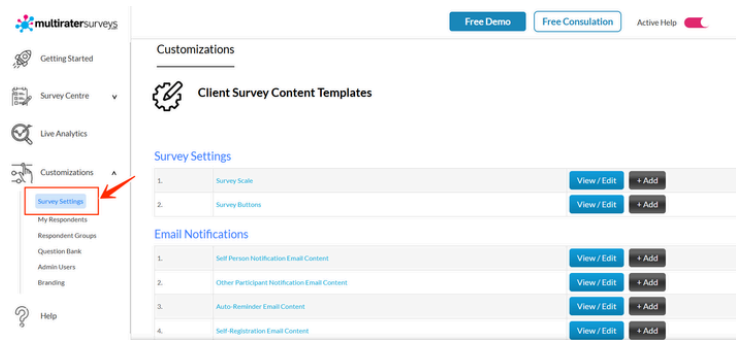
**Viewing or Editing Customized Survey Settings Templates**

1. Click Survey Settings. You'll be directed to the **Client Survey Content Templates** library.
2. This library lists all templates that can be customized. Click the **View/Edit** button next to the template description to view and edit a template.

Survey Settings

Adding New Templates

1. To create a new Survey Scale or Survey Button, click **+Add** and choose **New Template**.
2. Then, enter your desired content.
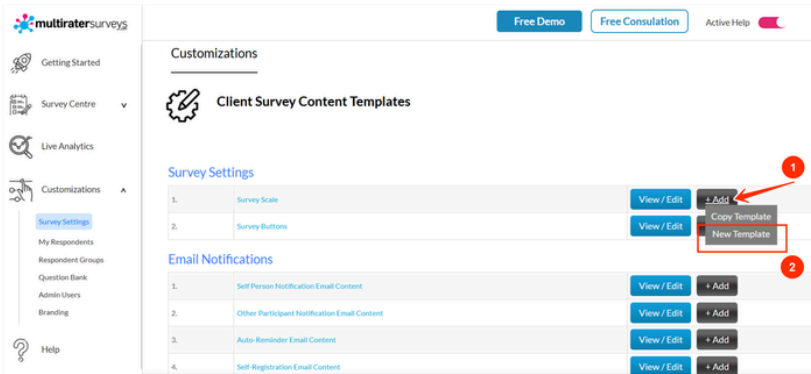
3. For all other content templates, we recommend using an existing MRS template as a base to ensure all required hyperlinks are included:

- Click **+Add**, then select **Copy Template**.
- Customize the wording as needed, but do not delete any existing hyperlinks.
- Save the customized template under a new name.
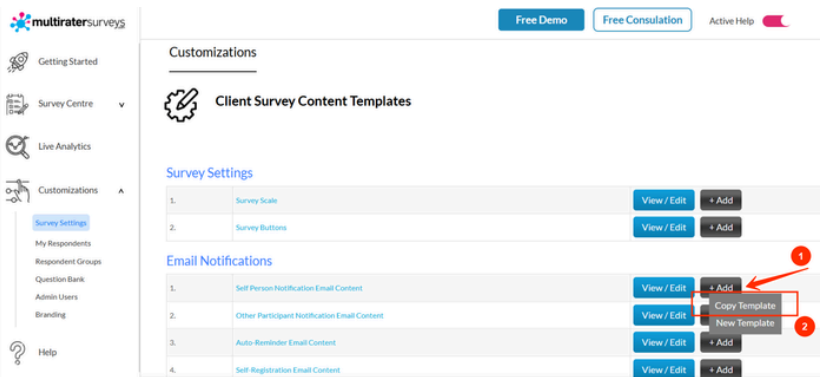
My Respondents

All respondent information across your surveys can be found under the **My Respondents** tab.

To upload respondents, click the **Add Respondents** button. You have two options, depending on the number of entries:
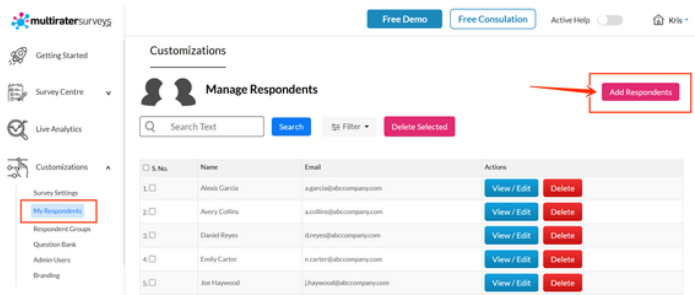
**Option 1 – Bulk Upload (Recommended for large respondent lists)**

- Click **Upload CSV**.
- A pop–up window with detailed instructions will appear—please review these carefully before preparing your CSV file.
  - *Note: You can download our CSV template in the **Resources** section of this guide.*
- Once your file is ready, select it from your device, and click Import.
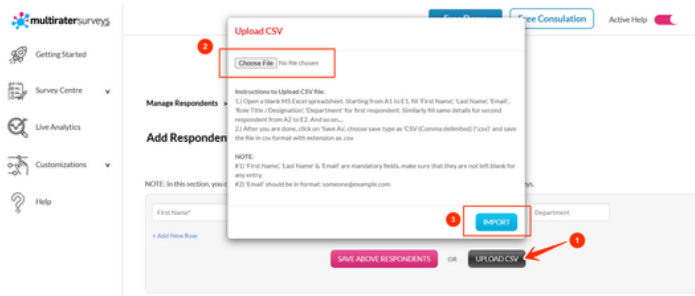
My Respondents

Option 2 – Manual Entry (Ideal for small respondent lists)

- Enter the respondent's First Name, Last Name, Email Address, Role Title, and Department.
- Click **+Add New Row** to continue adding additional respondents one by one.
- Then, click the **Save Above Respondents** button after adding all your individual respondents.
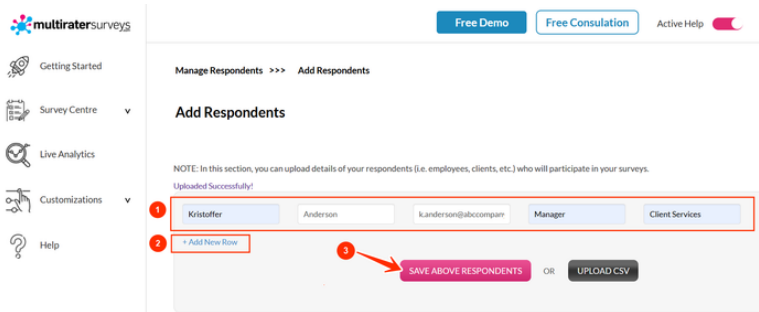
Respondent Groups

Respondent Groups can be customized to reflect the structure, departments, and terminology specific to your organization. Setting this up in advance allows you to easily allocate respondents to the appropriate group when creating a survey.

- Click **Respondent Groups** to access the Respondent Groups Library.
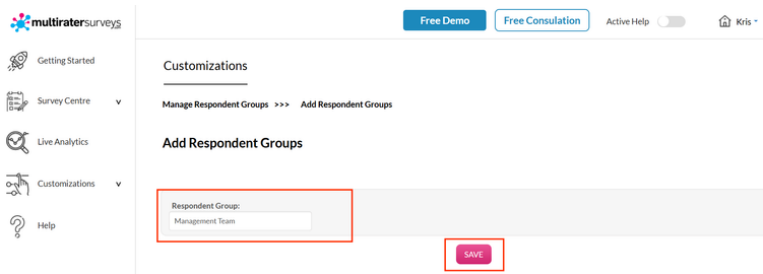- A list of default respondent groups is provided and will appear in this section.
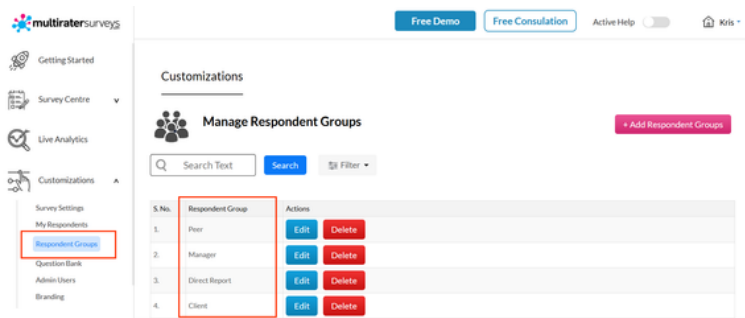
Respondent Groups

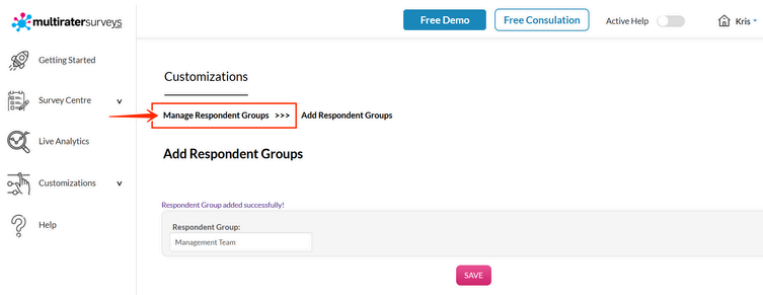**Adding Your Own Respondent Groups**

To create custom respondent groups:

- Click **+Add Respondent Group**.
- Enter the name of your respondent group.
- Click **Save**.

To add more groups, simply repeat the steps above.

Click the Back button to return to the Manage Respondent Groups library, where your newly added group will appear.


You can edit or delete any group, except for "SELF", which is the primary participant group used in 180 and 360 surveys. To make changes, click the **Edit or Delete** buttons next to the group name.
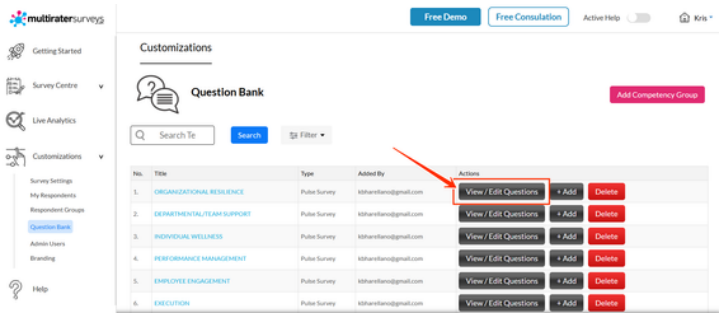
Question Bank

The Question Bank is where all Competency Groups and Questions are stored. You have two options for building your Question Bank:

- Add new Competency Groups and Questions before creating a survey.
- Or, add questions as you develop your survey—they will automatically be saved to the Question Bank for future use.
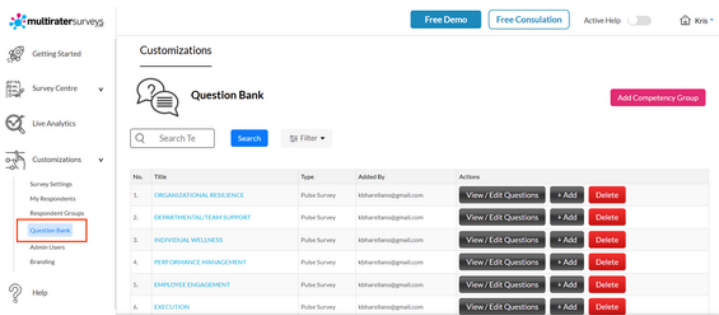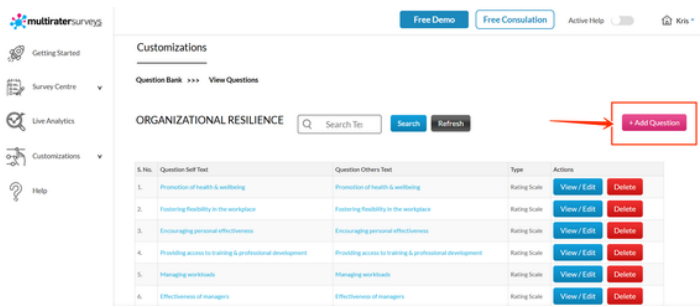

Managing Questions and Competency Groups

- Click **View/Edit Questions** to view, edit, delete, or add questions within a Competency Group.
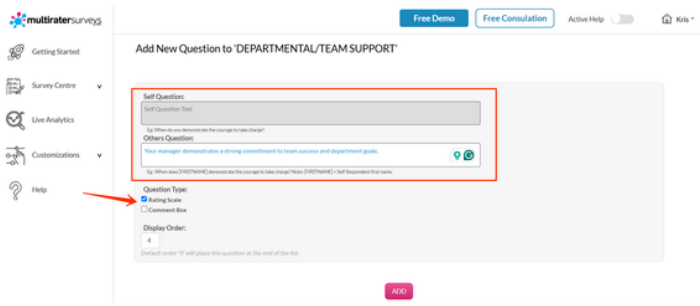
Question Bank

Managing Questions and Competency Groups

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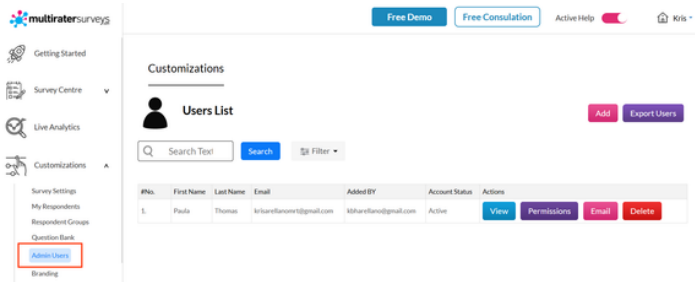

- Enter your question, then select the question type:
    - Rating Scale (for rated questions)
    - Comment Box (for open-ended comments)
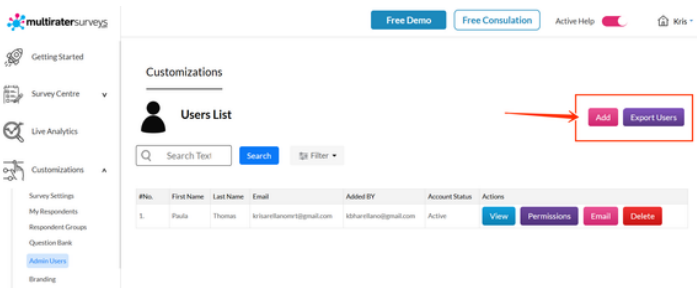   - Or select both if you want a rating and a comment box.

Admin Users

Admin Users is where you can view and add your administrator staff who will assist in managing surveys on the platform.
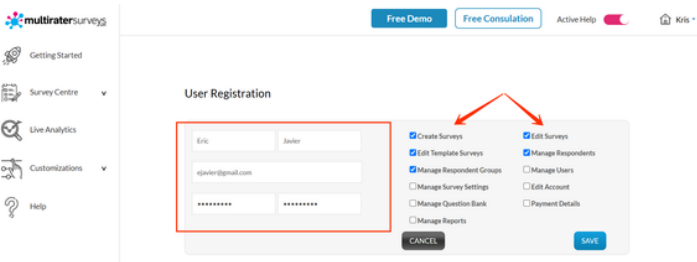

Adding a User

- To add a user, click the **Add** button.
- You can also export the list of your users as a CSV file by clicking **Export Users**.
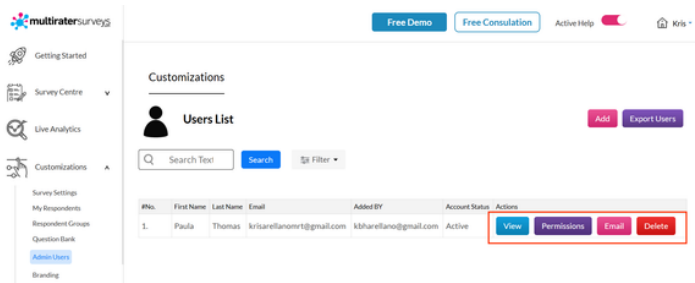

- When registering a new user, enter their first name, last name, email address, and assign a password. Then, select the permissions you want to grant to the user.
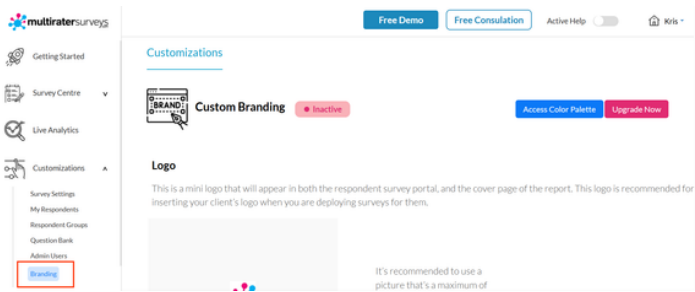
Admin Users

Managing a User

- Once a user has been added, you can view their details, edit their permissions, send them an email to reset or create their own password, and delete the user if needed.

Branding

Branding is where you can customize the logo, white label logo, and banner that will appear on your surveys.


Note: Custom branding is available only on specific subscription plans. To customize your white label logo and banner, you must upgrade to an eligible subscription.

Uploading a Logo

- To upload a logo, click **Upload.** The recommended image should have a maximum of 300px X 60px (w X h) and 5MB or less. The supported format is a PNG or JPG file. *Note: This mini logo will appear on the respondent survey portal and the report cover page.*
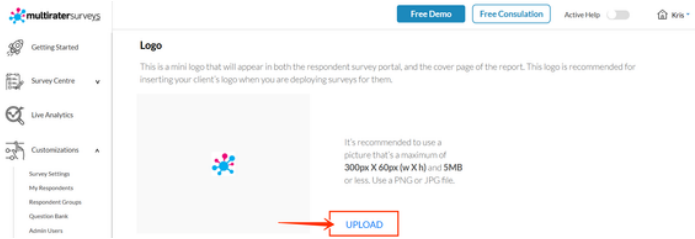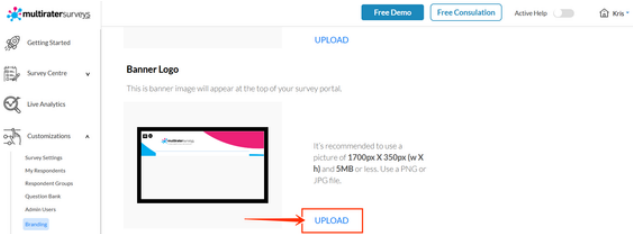

White Label Logo

This is where you can replace all instances of the MultiRater Surveys logo with your company's logo. Your logo will appear across the administrative platform, survey portal, and all reports.
Tip: We recommend using a colorized version of your logo, as the backgrounds are white. A colored logo ensures better visibility and a more professional appearance.
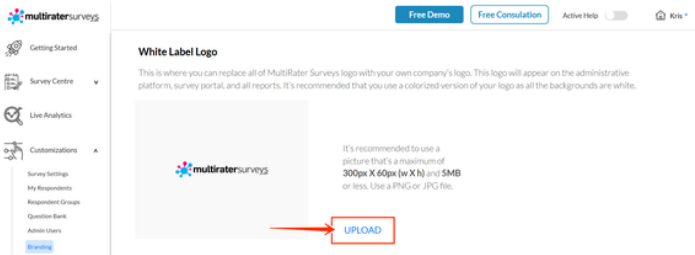
Banner Logo

The Banner Logo is a banner image at the top of your survey portal, giving it a personalized and branded look.

📚 Additional Resources

Resource	Description	Link
📅 Annual Survey Plan	A comprehensive guide for planning and scheduling feedback surveys throughout the year.	Download PDF
📊 Multiple Upload 360 360°	Excel template for uploading multiple 360 survey participants and raters in one go.	Download Excel
📥 Multiple Upload 180 180°	CSV format for bulk uploading and scheduling 180 surveys efficiently.	Download CSV
🧠 Guide on Analysis & Debrief	A step-by-step guide to analyzing results and conducting impactful debrief sessions.	Download PDF
🏗️ Develop a Leadership Framework	A guide to designing a tailored leadership capability framework for your organization.	Download PDF
📈 2025 HR Research Report	Insights on the future of HR skills and leadership strategies based on latest research.	Download PDF

Thank You for Using **MultiRater** Surveys!

We appreciate you taking the time to go through this user guide.

If you have any questions, encounter any issues, or simply want to explore more features, our support team is here to help.

CONTACT INFORMATION

🌐 **Website:** www.multiratersurveys.com

✉ **Customer Support Email:** support@multiratersurveys.com

📞 **Phone Number (AU):** +61 2 9936 9060

📞 **Phone Number (US):** +1 330 642 3467

Let's build better leaders and stronger teams—together.