PSYTECH
GeneSys

Unit Six.Two: Administering a 360 Project

Unit Six.Two: Objectives

Add & Administer Sessions in a 360 Project

- Adding Individual 360 Sessions
- Bulk Importing 360 Sessions
- SELF Specified Raters
- Invite Raters
- Project Tracking
- Generating 360 Reports

Adding Individual 360 Sessions

A 360 Session relates to one SELF. The SELF is the target of the 360 appraisal, and has a number of raters assigned to various roles who will also complete the 360 appraisal questionnaires.

All 360 SELFs, and their raters must already be Respondents within the main Psytech GeneSys System. Therefore before adding a new session please follow the instructions in tutorial 2.2: Adding Respondents to the System or follow the instructions for bulk importing of 360 sessions in the next section of this tutorial.

Once you have your respondent in the system select your 360 Project from the "360 Projects" node in the navigation tree menu. If you do not already have a 360 project follow the instructions in tutorial 6.1.
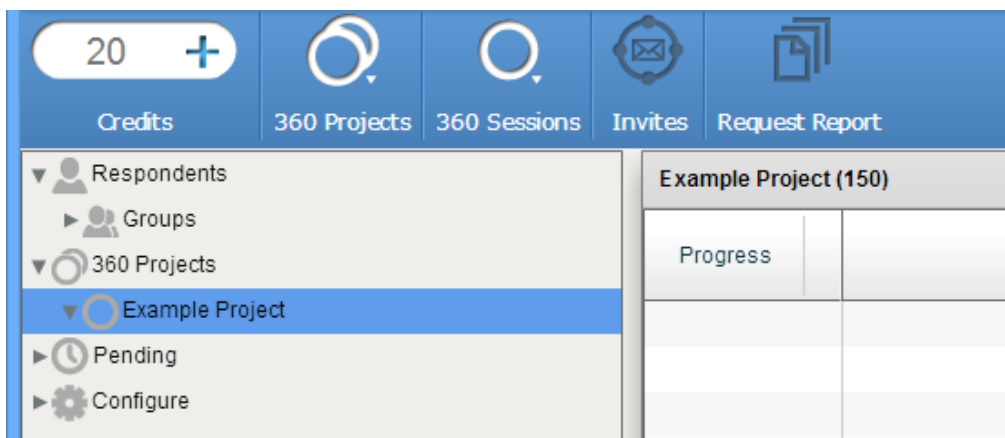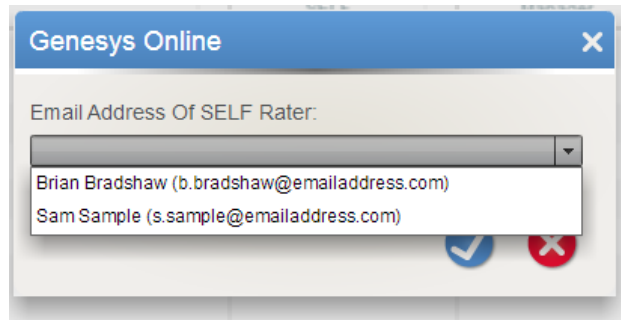

Selecting the project will change the main content area display to the Project View.

Click the "360 Sessions" button in the main tool bar, and then select the "Add 360 session" option from the menu.
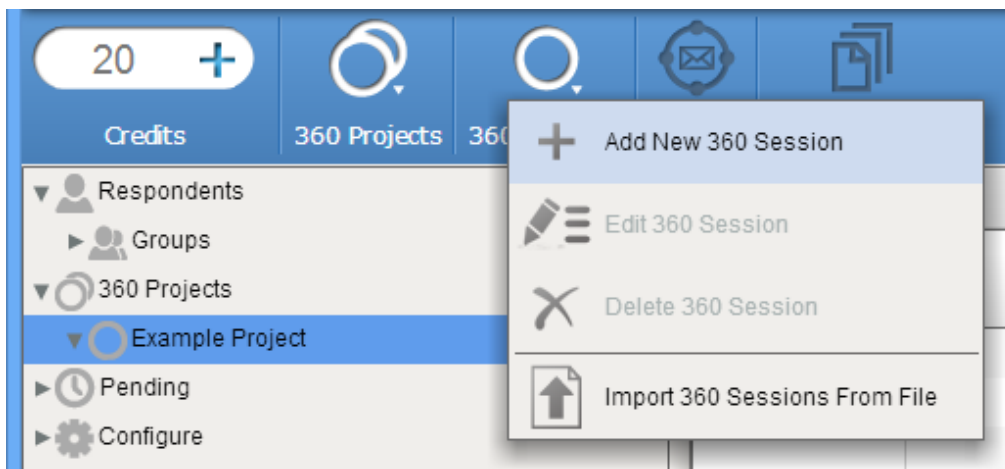
From the drop down list that is presented select the respondent who will be the SELF for this session, and then press the Tick.

The session will now be created, and the main content area will switch to Session View.

In session view you are presented with a list of all your existing respondents.

To help you find specific respondents there is a live search box.

Drag and drop the raters from the rater pool into their roles for this session. Then when finished press the Save button in the main toolbar.

Bulk Importing 360 Sessions

Bulk importing allows you to create multiple 360 sessions, and populate each session with raters instantly.

Please Note: If you are planning on inviting your SELF's to select their own raters this option is also available to import all the sessions.

To import 360 sessions you will need to create a structured CSV file containing all the raters information for each session. For ease, a CSV file can be created in Excel, or similar spreadsheet applications, then use the Save As option when saving to select the .csv file type.
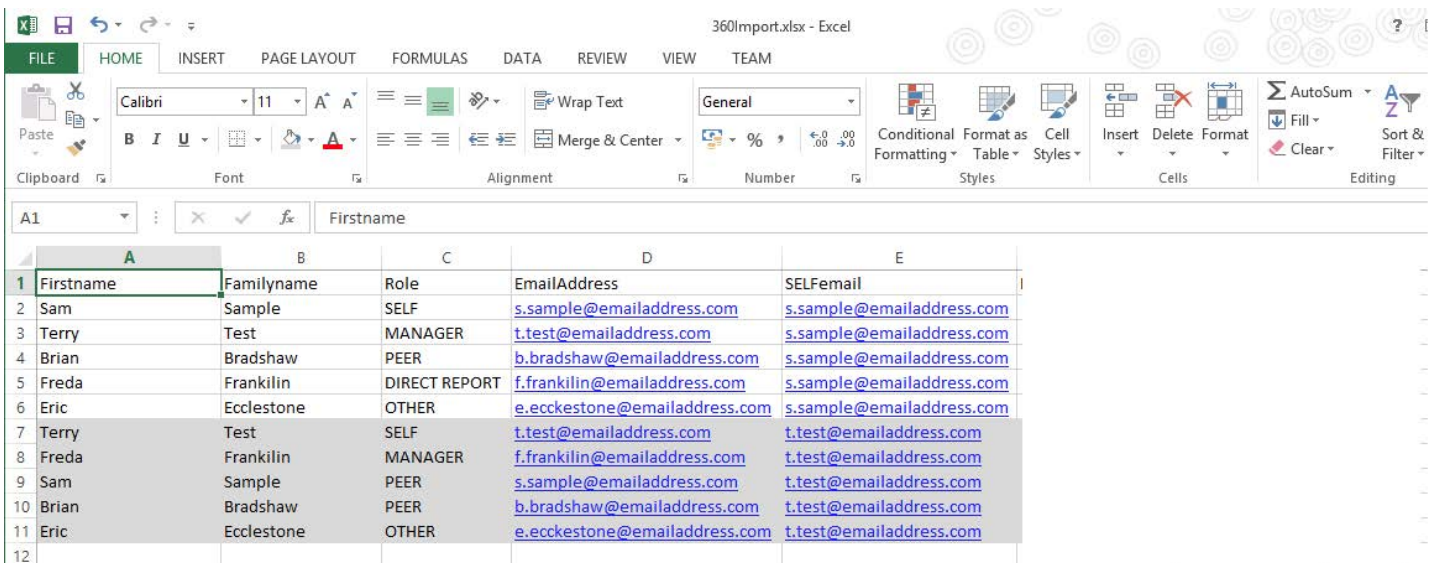
Please Note: A csv file needs to be structured correctly or the data within will not be imported correctly.

The columns used in the csv file are listed below in the order that they should be in the csv file. Each row will contain a new rater and their information.

Please Note: It is highly likely that some raters will appear in more than one session. Please make sure that these raters are entered each time for every session they are a member of.

- First Name *
- Family Name *
- Role *
- Email Address *
- SELF Email Address *

* Indicated required fields.

A sample 360 import file can be downloaded from:

Repeat this for each session to be imported.

Once you have created a CSV file go to your project in the 360 Projects node of the navigation tree. This will then display the Project View, listing any session you already have in the Project.

Click on the 360 Sessions button in the main toolbar and select "Import 360 Sessions From File".
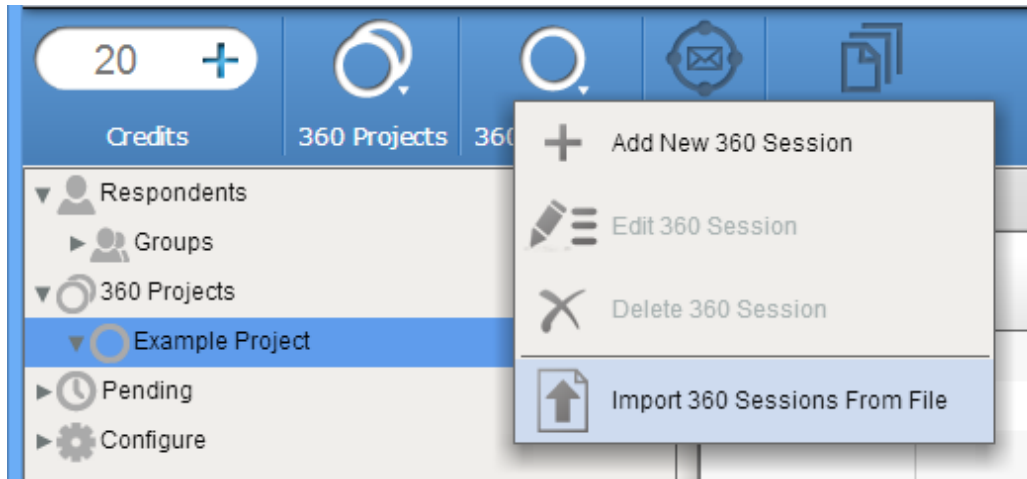
A file browser window will open, use this to find your CSV file. Select it, and then press Open.
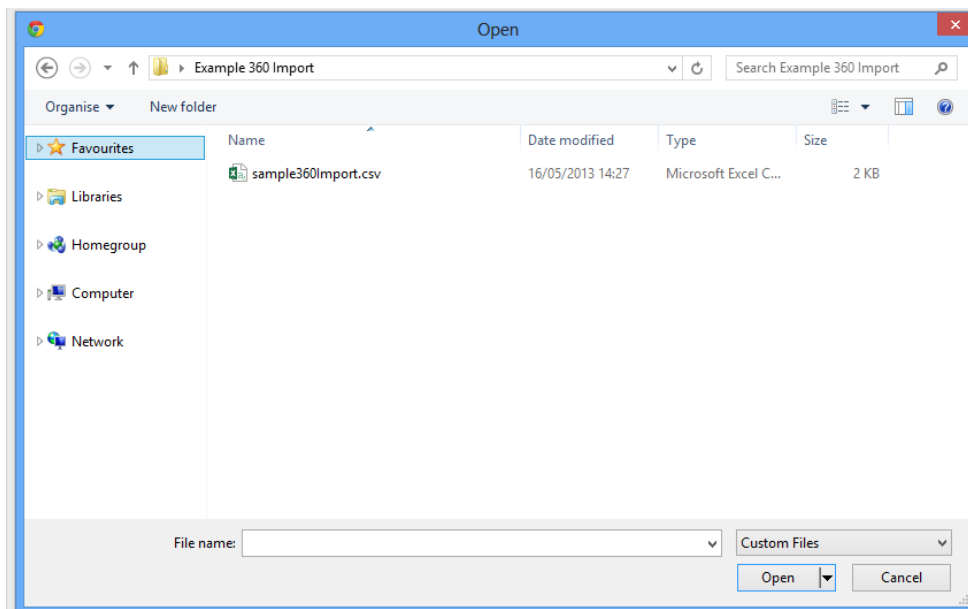
A summary view of the sessions you are importing will then be shown listing each session and the raters for that session. When you are happy with the data being imported click the "Import" button.
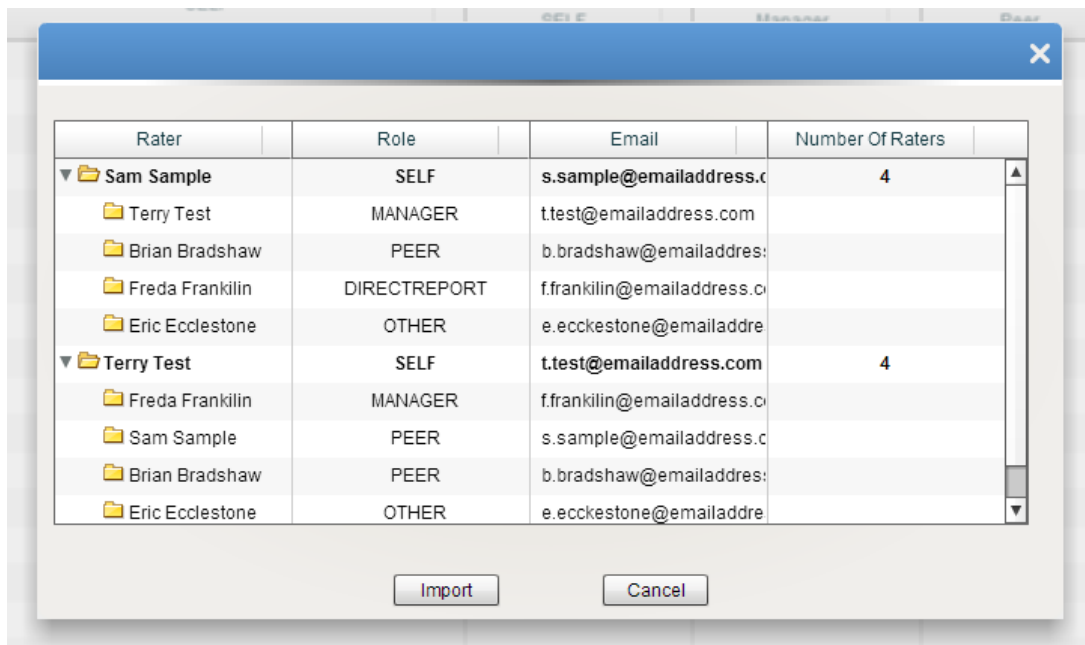

Please Note: If any raters are incorrectly entered they will be shown in red and will not be imported. We suggest if you are shown errors that you cancel the import then check the invalid record in the summary, and then correct the CSV file. Then try importing again.

SELF Specified Raters

It is sometimes not possible to know who will rate a SELF prior to an assessment. In these situations you can ask the SELF to specify their own raters. Once they have done this you will receive a notification, you can then review their choices and send the invitations when ready.

To send invitation to the SELF to specify rates you must have already created a project, and a Session. Once this is done, select the session(s) where you wish the SELF to specify. Then click the "Invites" button in the main toolbar, and select the "Invite to Specify own Raters" option.
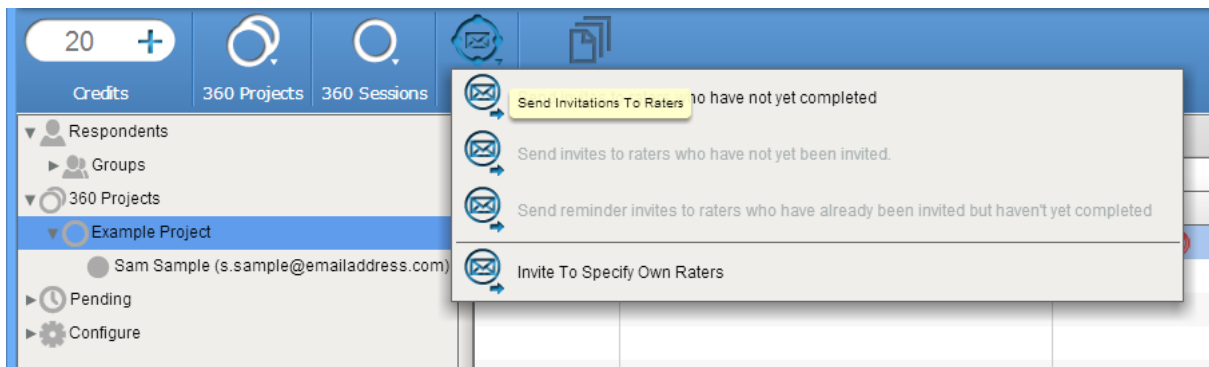
The email invitation wizard will now launch allowing you to specify the details for this invitation.
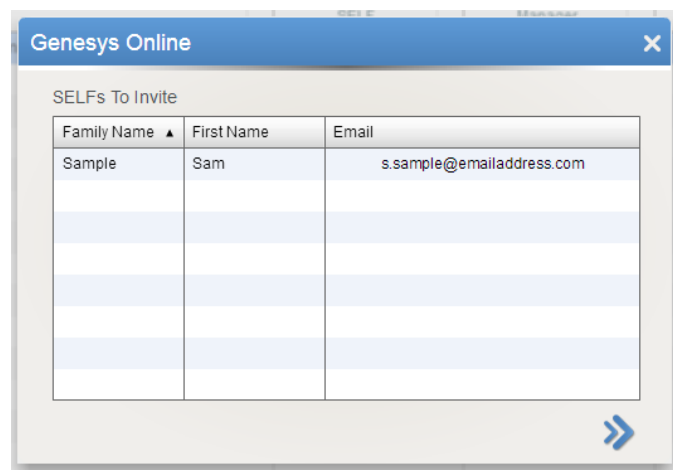
Once sent the SELF will receive an email containing instructions and a link. They should click on this link, which will give them access to the SELF 360 area. Here they are given instructions, and can add their raters, specifying their roles, and providing the information required to send the raters their 360 questionnsires. Information required from the SELF about the raters is:

- Rater First Name
- Rater Family Name
- Rater Email Address
- Rater Role

The self is also given the chance to complete their own questionnaire at this point.

If you have specified a minimum n umber of raters when setting up the project the SELF cannot complete their own questionnaire until this is reached, and cannot submit their raters to you.

SELF Specified Raters

To send invitations to raters select the project in the 360 Projects node of the navigation tree menu, then highlight the sessions you wish to send invitations for.

Press the Invites button, where you are offered a choice of actions, these actions are dynamically chosen depending on the state of your 360 sessions.

- Send Invites to raters who have not yet completed: This will send invitations to all raters from the selected sessions who have not already completed their questionnaire.
- Send Invites to Raters who have not yet been invited: This will only send invites to raters who have not already been sent invites.
- Send reminders to raters who have been invited but have not completed: This will only send invites to raters who have already been sent an invitation in the past. If a rater has not already been sent an invitation they will not be invited at this point.
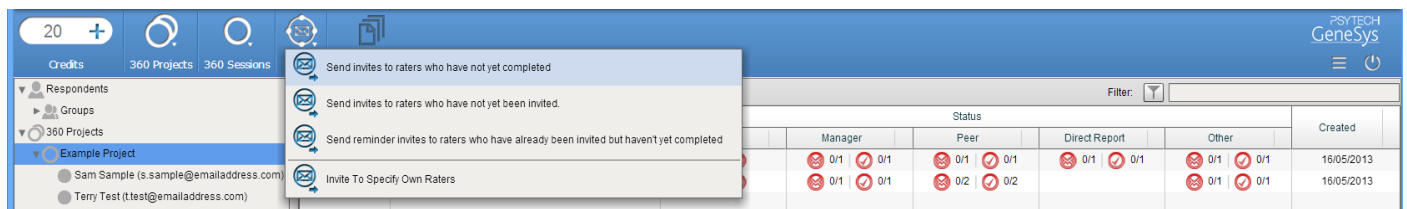
Select the option you wish you use. The invite wizard will not launch allowing you to specify invitation details.

Session Progress
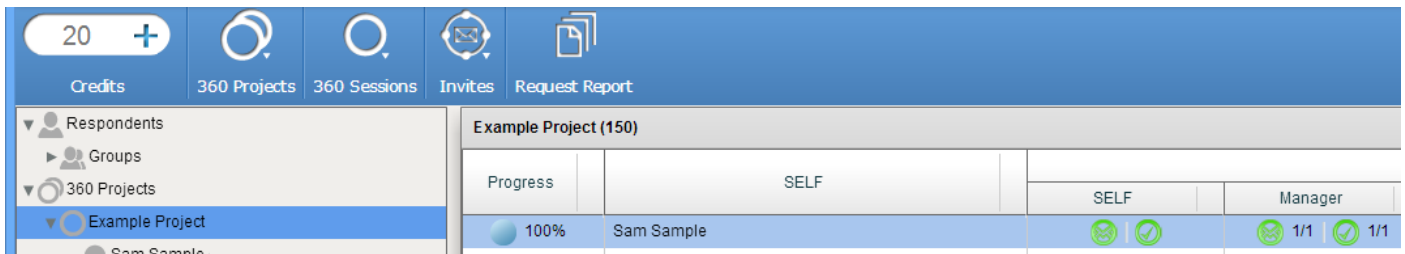
Invitation & Questionnaire Progress
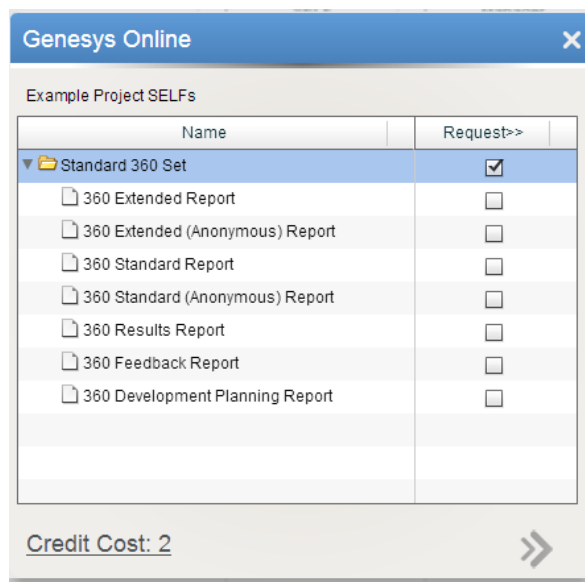

Session SELF Email

Project Screen

Generating Reports From 360 Projects

To request a report for a 360 sessions the SELF and at least one other rater must have completed their questionnaires.

Select the session(s) you wish to generate reports for, then press the Request Reports button.

This will open the Report Request Wizard.

If you have selected more than one session, you will be shown a summary screen. To remove sessions from this request, drag and drop the SELF out of the summary.

Select the Report Set to generate, and then the reports from within the set you wish you download now.

The credit price for the request is shown at the bottom of the wizard. The cost of the 360 Report Sets is depended on the number of raters in the sessions who have not been paid for in the past.

The cost is 1 credit per rater. Once a rater has been scored for a session, that rater will be free if you request the report again.