

ADMINISTRATOR GUIDE FOR THINKWISE 360

SETTING UP, MANAGING, AND FINALIZING A 360 SURVEY

Publish Date: January 2017



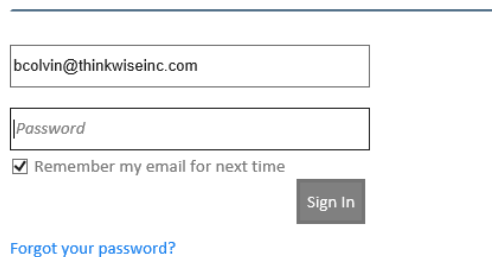
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SETTING UP A 360 SURVEY PROJECT

1. LOGIN TO THINKWISE

Go to [https://\[yoursite\].thinkwiseinc.com](https://[yoursite].thinkwiseinc.com) and enter your email address and ThinkWise password. The [yoursite] portion is typically the email domain for your organization. If you have any questions on the correct site name, please contact ThinkWise Support (Thinksupport@ThinkWiseInc.com).

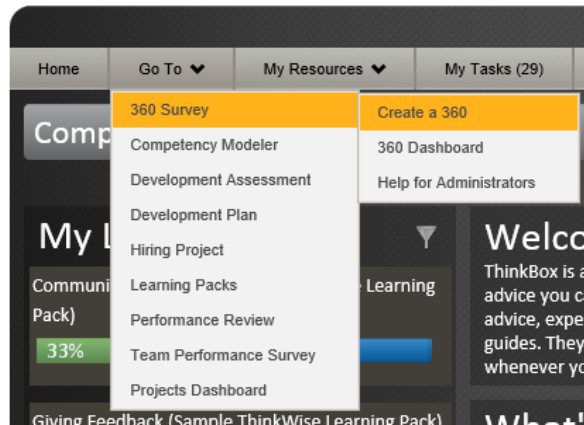


The screenshot shows the ThinkWise login interface. It features a header with the ThinkWise logo. Below the header is a horizontal line. There are two input fields: the first contains the email address 'bcolvin@thinkwiseinc.com' and the second is labeled 'Password'. Below the password field is a checkbox labeled 'Remember my email for next time' which is checked. To the right of the checkbox is a 'Sign In' button. Below the sign in button is a link that says 'Forgot your password?'.

2. CREATE A 360 SURVEY

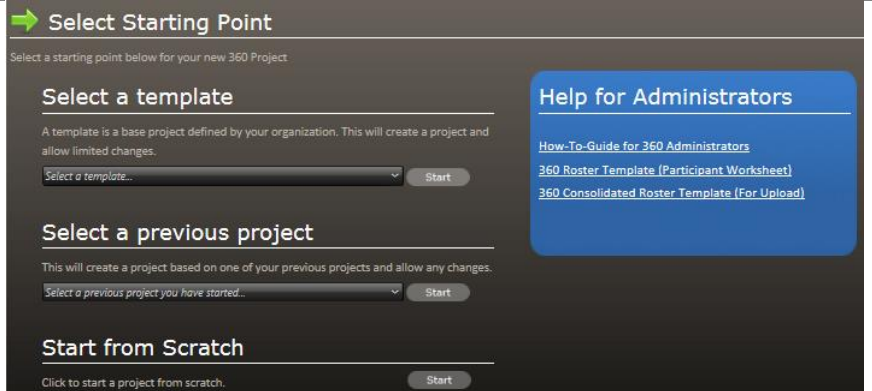
To create a 360 Survey:

- Hover over **Go To** in the menu bar
- Then hover over **360 Survey**
- Then click on **Create a 360**



3. SELECT YOUR STARTING POINT

You may base your 360 Survey on a template, a previous project, or start from scratch. (If you do not have any templates or previous projects saved in the ThinkWise system, you will not see this screen. You will go directly to the Basic Survey Information page.)



Template - Organizations may define 360 templates which can be used over and over. The following items are locked for editing when you choose a template: scale, who receives the report, level, scale questions, and open-ended questions. To choose a template, select an available template, then click Start. If your organization does not have any templates created, this option will not be available.

Previous Project - If you have created a previous project in the ThinkWise system, you may base a new 360 survey upon it. The scale, who receives the report, the level, the scale questions and the open-ended questions are pre-populated but you are able to change them. To base a new 360 on a previous project, select a project from those available, then click Start. This option will not be available if all previous projects were templates.

Start from Scratch - If you do not want to base your project on a template or previous project, click the start button found under "Start from Scratch."

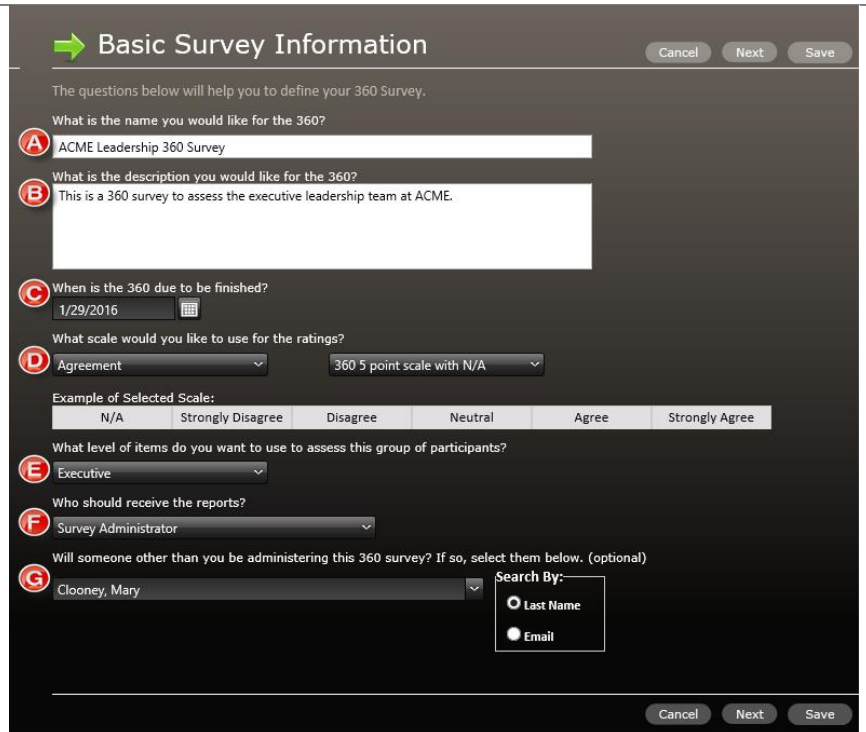
4. ENTER BASIC SURVEY INFORMATION

On this screen you will provide basic information about your survey. If you based your survey on a previous project or on a template, the scale, level and who will receive reports will be pre-selected.

Enter the following information about your survey:

- A. Name** – Name of the survey. Make it descriptive, e.g. Acme Executive Leadership 360. Keep in mind, the project name is visible on the task Home Page for the respondent. If you use the default ThinkWise Invitation Email, the project name will be visible to respondents there as well.
- B. Description** – Provide a description for this survey. Give as much detail as you can. This description will be available in the drop-down lists throughout the system to help you identify the project.
- C. Due Date** – The date by which the respondents should complete their survey. This is not a hard close date. If the due date comes and goes, the project remains open and respondents are still able to provide feedback.
- D. Scale** – ThinkWise provides three types of scales (Agreement, Satisfaction and Importance) and a range of values for those scales from 3 points to 10 points.
- E. Level** – Set the level of the survey items that will be used for this survey.
- F. Who Should Receive Reports** – The survey administrator, the participant (subject of the survey) or both may receive the 360 results.
- G. Who Should Administer** – You can set up a survey but assign the task of monitoring and finalizing it to someone else. Note: if you assign the project to another person to administer you will no longer have access to it or to the resulting reports.

Click **[Next]** to continue. Once all of the required information is entered you can click **[Save]** to exit setup and continue later, or **[Cancel]** to exit and start over.



Basic Survey Information [Cancel] [Next] [Save]

The questions below will help you to define your 360 Survey.

A What is the name you would like for the 360?
ACME Leadership 360 Survey

B What is the description you would like for the 360?
This is a 360 survey to assess the executive leadership team at ACME.

C When is the 360 due to be finished?
1/29/2016

D What scale would you like to use for the ratings?
Agreement 360 5 point scale with N/A

Example of Selected Scale:
N/A Strongly Disagree Disagree Neutral Agree Strongly Agree

E What level of items do you want to use to assess this group of participants?
Executive

F Who should receive the reports?
Survey Administrator

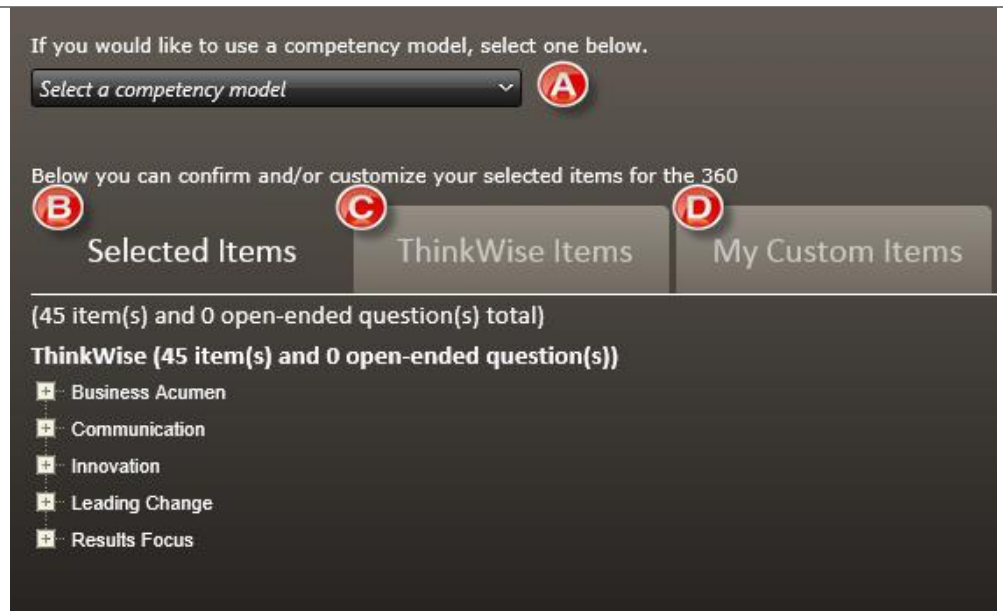
G Will someone other than you be administering this 360 survey? If so, select them below. (optional)
Clooney, Mary

Search By:
 Last Name
 Email

[Cancel] [Next] [Save]

5. CONFIRM OR SELECT ITEMS

Items are behavioral statements about the person being surveyed, e.g. identifies shared or common problems or opportunities. People responding to the survey (*respondents*) rate the extent to which they agree or disagree with that statement with respect to the participant.



- A. Competency Model** - Select your saved Competency Model or select one of the sample competency models that comes within ThinkWise. To do so, select one from the drop-down box.

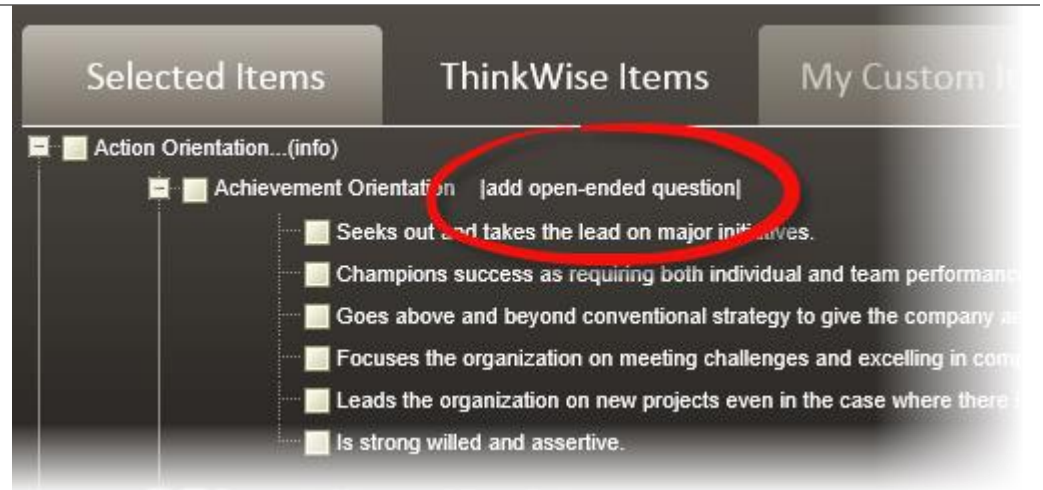
Note: If you have based your 360 on a previous project then items will already be selected when you open this page.

Refine the list of items you want to include by making selections from the available tabs. (If you based your project on an organizational template, only the 'Selected Items' tab displays.)

- B. Selected Items** - Shows you all selections across all tabs.
- C. ThinkWise Items** - Contains the competencies, supporting competencies and items which come pre-loaded with ThinkWise. Choose which to include by clicking the check marks. These items cannot be edited or changed in any way.
- D. My Custom Items** - Allows you to add categories, sub-categories, items, and competency comments as desired for the project. The items are only available to the individual who entered them, unless the project is an 'Organizational Template'. This will allow others to base a project on your template, but not edit your items in any way.

6. OPEN-ENDED QUESTIONS BY COMPETENCY

Open ended questions specific to a competency appear at the bottom of the page of scale questions. They allow respondents to provide free form feedback around that specific competency.



These types of questions can be added on the ThinkWise Items tab. To do so click **[add open-ended question]**, write your question and click **[Save.]**

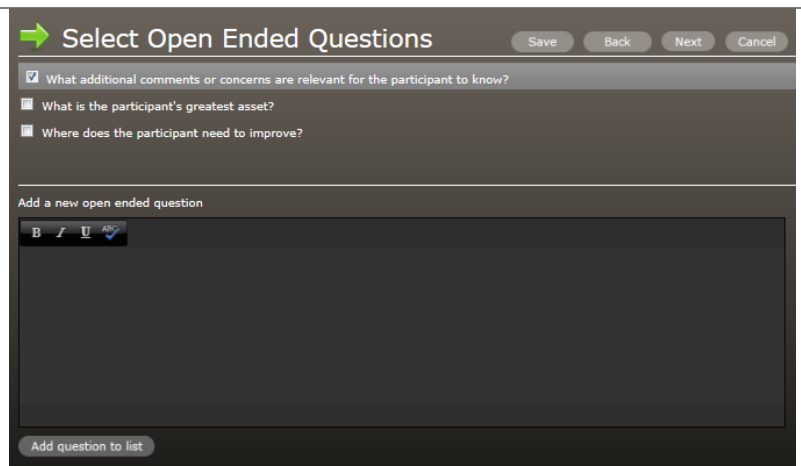
After you have selected all of the scale and/or open comments to be included in the survey, click **[Next]** to continue the project setup.

7. OPEN ENDED QUESTIONS

- Check the box next to any open-ended questions you want to include in the survey.
- Add a new open ended question by entering it in the text box, then clicking **[Add Question to List.]** These questions must be added one at a time.

While there is no limit to the number of open-ended questions the system will allow to be added, it is not recommended to have more than 5 open-ended questions per project.

Click **[Next]** to continue.



8. UPLOAD A ROSTER

Participants are the subject of the 360 Survey.

Respondents are the people providing feedback.

To add participants and respondents to a 360

Survey, you upload a *roster* with the list of participants, respondents and the relationship between the two.

To complete and upload a roster:

Template for Roster Upload - Download the template and complete it with:

- Participant First Name
- Participant Last Name
- Participant Email Address
- Rater First Name
- Rater Last Name
- Rater Email Address
- Rater Relationship

Save - Save the roster to your hard drive.

Browse - On the upload roster screen, click **Browse** to find the file, select it, then click **Open**.

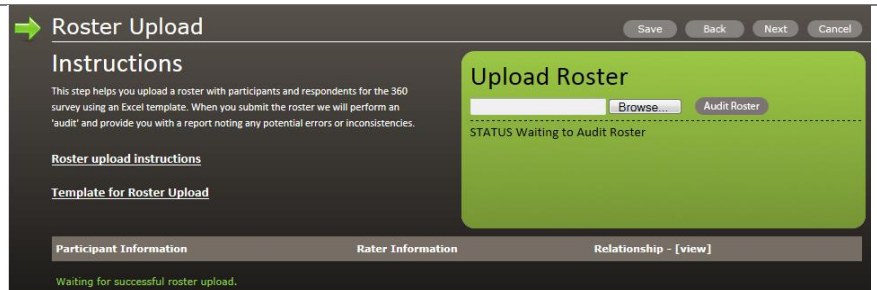
Audit Roster - to check the validity of the roster.

Review - Open the audit report by clicking on [Click here to review audit report](#).

- Resolve any problems found in the roster and resave it. Repeat as necessary until you get no errors. PLEASE NOTE – If you do not include self-relationships in the roster, you will NOT be able to add them after launching the project.

Upload - Click **Upload Roster** to load the roster into ThinkWise.

Click **[Next]** to continue.



Hints:

- ✓ For additional information on creating, auditing and uploading a 360 Roster refer to the “Roster Upload Instructions,” available on the 360 Roster Upload page.
- ✓ The 360 Administrator generally asks participants to provide their own list of respondents by filling out an excel template. The template can be found on the 360 Project Setup page.

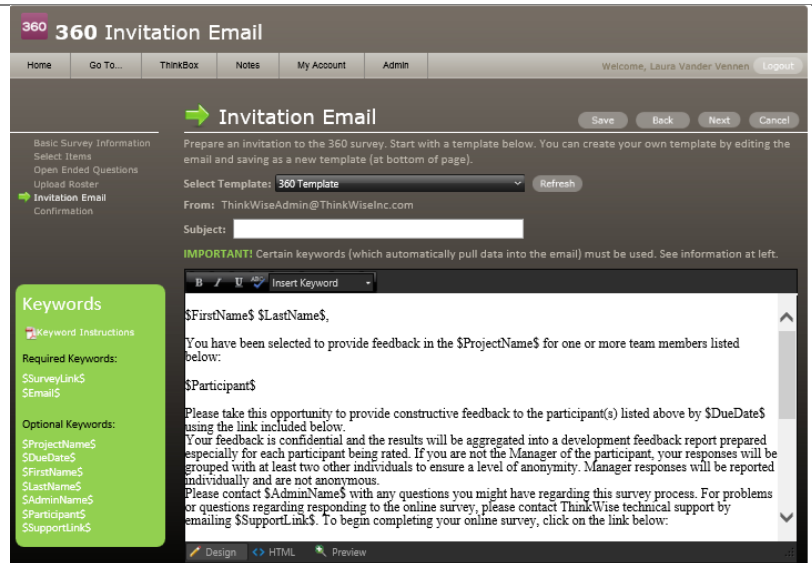
9. PREPARE THE INVITATION

ThinkWise provides a draft invitation message template. Edit to customize the email as desired.

Select Template - If there are any email templates you have created from previous projects you can choose them from this drop down list.

Subject - Give the email a subject line, e.g. "Invitation to complete the Acme Executive Leadership 360."

Email Text - Within the draft invitation message you will see words preceded and followed by a '\$'. These are keywords. Similar to a mail merge, these will be replaced with information from your 360 Survey when the invitation is sent. You can remove most of these if you want – but \$SurveyLink\$ and \$Email\$ are required to be included somewhere in the text.



At the bottom of the page, you have three additional options.

Send Test – To review the format of the invitation email prior to launching, click 'Sent Test'. If you have a roster loaded, a sample email will be sent to your account for the first respondent listed in the roster. Please note, this email is for review purposes only. The link contained within the email is not valid. Even after launching the project, the link will not be valid.



Save Template - After making your edits, you can save the email as a template here. After clicking Save this template will be available to you in the drop down list of available email templates. (See item 2, above.)

Do Not Send Emails - If you DO NOT want the ThinkWise system to automatically send email invitations, check the "Do not send invitation email" checkbox. An Excel spreadsheet containing all of the participant and respondent information, including the unique link to access the survey, is available from the project homepage after launching. The information in the project status spreadsheet can be used to provide information to respondents when self-managing email invitations.

You can click [**Save**] to save your partially completed email invitation, and then return to this screen at later time . When you have completed the invitation click [**Next**].

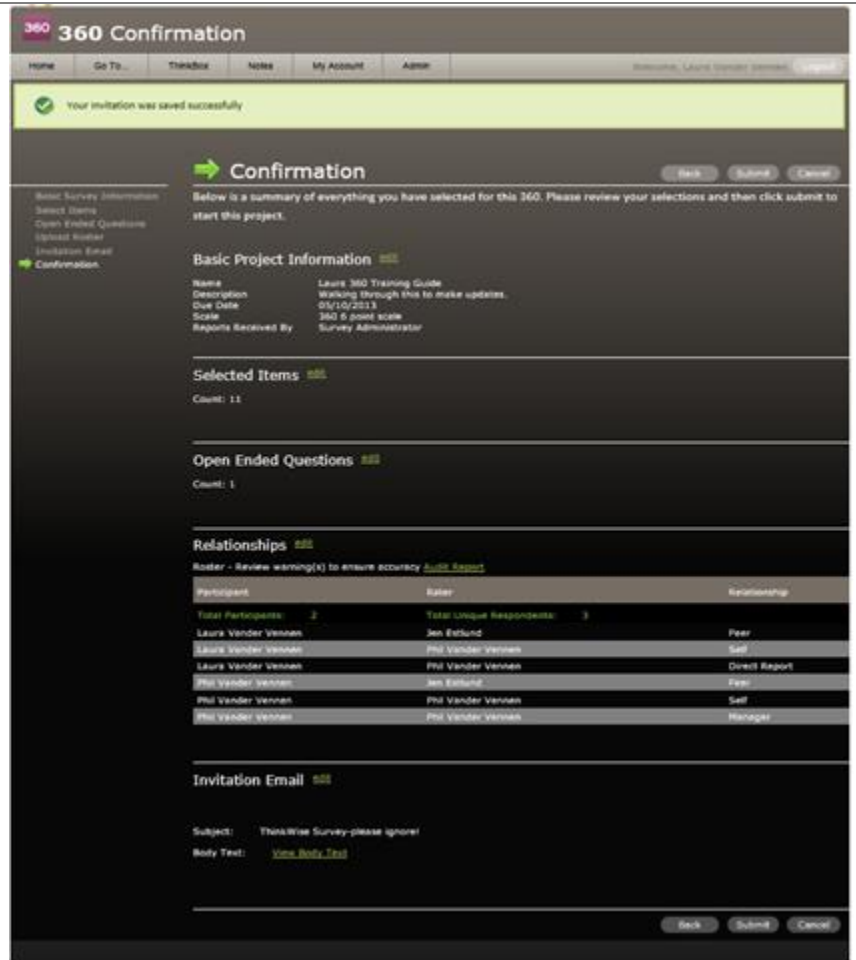
10. REVIEW & SUBMIT 360 PROJECT

The confirmation page gives you one last chance to review the 360 project selections prior to launching.

To go back and change any of the sections, click the “edit” link.

To initiate the 360 survey, click **[Submit.]**

Unless you opted out of sending 360 Survey invitations from the ThinkWise system, all survey invitations will be sent as soon as you click **[Submit]**. There is NO way to back track once you launch a survey, so please take the time to make sure that your project is 100% complete and ready before launching.



360 Confirmation

Home Go To... ThinkBox News My Account Admin

Wendee, Laura Vander Vennen Logout

✔ Your invitation was saved successfully

Confirmation [Back] [Submit] [Cancel]

Below is a summary of everything you have selected for this 360. Please review your selections and then click submit to start this project.

Basic Project Information [edit]

Name: Laura 360 Training Guide
 Description: Working through this to make updates.
 Due Date: 03/10/2011
 Scale: 360 5 point scale
 Reports Received By: Survey Administrator

Selected Items [edit]

Count: 11

Open Ended Questions [edit]

Count: 1

Relationships [edit]

Roster - Review warning(s) to ensure accuracy [Audit Report](#)

Participant	Rater	Relationship
Total Participants: 2		Total Unique Respondents: 3
Laura Vander Vennen	Jan Eklund	Peer
Laura Vander Vennen	Phil Vander Vennen	Self
Laura Vander Vennen	Phil Vander Vennen	Direct Report
Phil Vander Vennen	Jan Eklund	Peer
Phil Vander Vennen	Phil Vander Vennen	Self
Phil Vander Vennen	Phil Vander Vennen	Manager

Invitation Email [edit]

Subject: ThinkWise Survey-please ignore!
 Body Text: [View Body Text](#)

[Back] [Submit] [Cancel]

MANAGING A 360 SURVEY PROJECT

After completing the 360 Survey and clicking Submit, tasks are generated for all participants and respondents to complete their part of the survey. Invitation emails are also sent unless you opted out of having the ThinkWise system automatically send them. A Project Home Page is automatically created for managing the 360 Survey project.

1. THE PROJECT HOME PAGE

After submitting the 360 survey setup, the Project Administrator is immediately taken to the Project Home Page. The Project Home Page provides access to several features:

- A. **Summary Information:** The basic project info such as name, description, scale.
- B. **Project Status:** This will be 'In Progress' or 'Complete.'
- C. **Select Action:** Provides options to edit title/description, manage the roster and transfer ownership. If the project is complete, the manage roster option will not be available.
- D. **Progress bar:** Shows how many of the surveys have been completed.
- E. **Remind All Incomplete:** Provides an option to send a reminder email to everyone who has not completed their survey. This reminder is completely customizable, but must contain the respondent's email address and the survey link from the Insert Field..
- F. **Admin Tasks:** Shows the administrator's tasks in the survey.
- G. **Participants:** Click this tab to view a list of participants as well as a record of how much feedback has been received.
- H. **Respondents:** Click this tab for a list of respondents and their emails.
- I. **Reports:** After the project closes, links to the individual and group reports can be accessed behind this tab.



The screenshot shows the ThinkWise 360 Survey Project Home Page for 'Martin Manufacturing Leadership'. The page includes a navigation bar with 'Home', 'Go To', 'My Resources', and 'My Tasks (57)'. The main content area displays project details: 'Martin Manufacturing Leadership', 'Project Status: In Progress', 'Due Date: 01/29/2016', and 'Reports Received By: Survey Administrator'. A progress bar shows '0 of 18 Surveys Completed'. Below the progress bar, there are tabs for 'Admin Tasks', 'Respondents', 'Participants', and 'Reports'. A table lists tasks, including 'Complete ThinkWise360 Project Setup' (Completed) and 'Close Survey and get Results' (Not Started). A 'Remind All Incomplete' button is visible on the right side of the page.

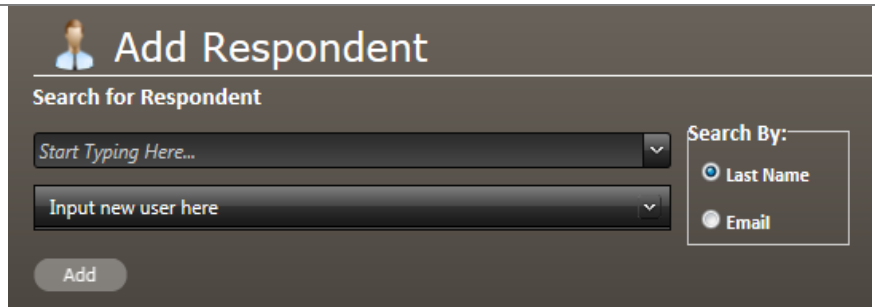
2. MANAGING THE ROSTER – ADDING RESPONDENTS

On occasion a Project Administrator needs to make changes to a roster after the 360 Survey has begun. Manage Roster allows the Administrator to do this. The Administrator can ONLY add additional respondents for an existing participant. New participants cannot be added to a project that has been launched.

To add a respondent to the roster:

Click the drop

Prior Respondent - If the individual has been a respondent in a previous 360, you can search for their account by typing the last name in the 'Start Typing here...' box.

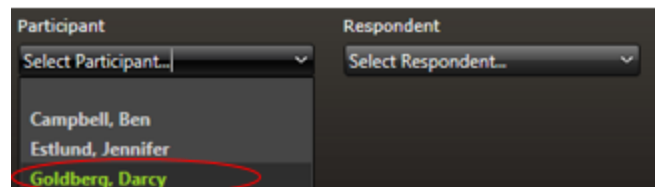


New Respondent - If the respondent is not already entered in the ThinkWise system, click on the 'Input new user here' box. Enter the first name, last name and email of the respondent. Click [Save] to add the new user to the system.

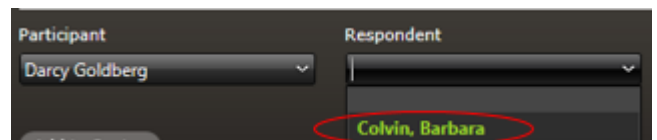
Click Add. The new respondent will now appear in the "Add Relationships" section in the 'Respondent' drop-down list.

3. MANAGING THE ROSTER – ADDING RELATIONSHIPS

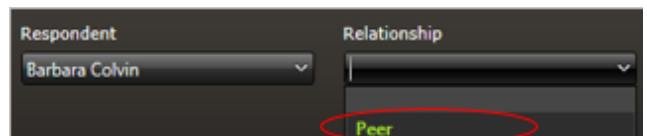
Participant - Select from the list of participants for this survey. (Note: you can only choose from existing participants. New participants cannot be added once a survey has been launched.)



Respondent - Select the respondent from the list for this survey.

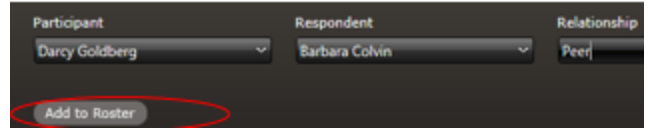
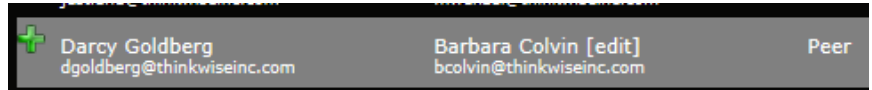


Relationship - Select the relationship the respondent has to the participant. E.g. their manager, peer, customer, direct report.

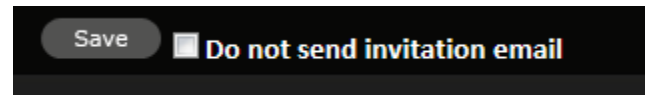


Click Add to Roster.

This **temporarily** adds the record to the roster with a green '+' sign on the record. This record is not truly added to the roster until you click the [Save] button located on the bottom of the page.

Once you are finished adding additional respondents and relationships, click **Save**. The invitation email created during the survey setup will be sent to the new respondent(s). If they were in the *original* roster, a new email with an *updated* list of participants to rate will be sent. Select the "Do not send invitation email" box if you do not want ThinkWise to automatically send emails.

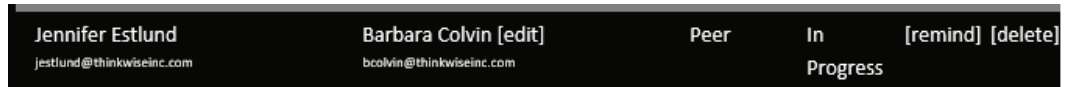


4. MANAGING THE ROSTER – DELETING RELATIONSHIPS

At the bottom of the Add Respondents/Add Relationships screen, you can also delete a relationship from your project.

To delete a relationship:

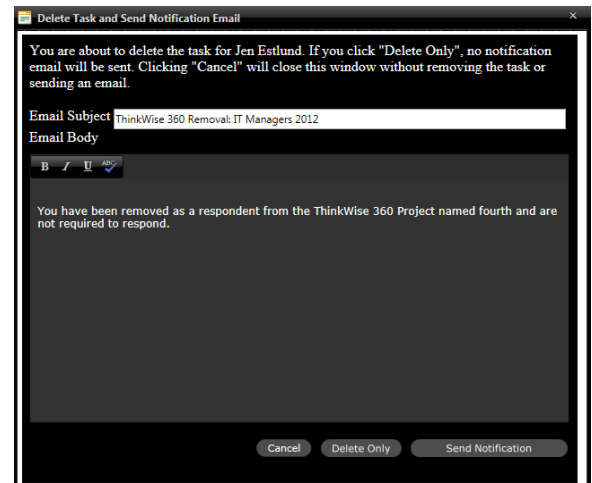
- Locate the participant and respondent from the list displayed on screen.
- Click on **[delete]** for the relationship to be removed from the project.



You will receive a confirmation window. You can enter any text you would like into the notification email.

- If you click **Cancel**, the window will close and the relationship will not be removed.
- To remove the relationship and not send an email notification, click **Delete Only**.

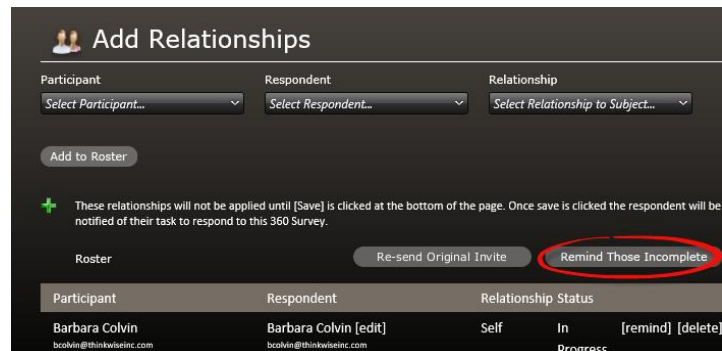
To remove the relationship AND send an email notification, click **Send Notification**.



5. MANAGING THE ROSTER – SENDING REMINDERS

You can choose to send reminders from the Manage Roster page as well.

Remind Those Incomplete functions the same way as it does on the project homepage; it will send a reminder to all individuals who have a status that is not completed. The text for the email reminder is completely customizable, but must contain the Insert Fields ‘Respondent’s Email Address’ and ‘Survey Link’.

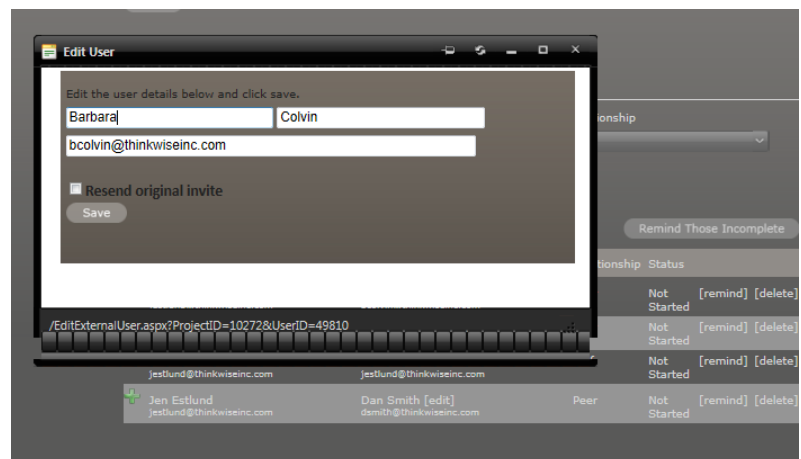


6. MANAGING THE ROSTER – EDITING USERS

If you have added a user to your 360 project, you have the ability to edit their name and email address. This can be done from the Manage Roster Screen or from the Project Home Page.

To edit a user name:

- Click **edit** next to the user name in the roster list.
- Make any changes necessary in the Edit User dialog box.
- Click **Save** to save your changes. Click Resend Original Invite to send another copy of the 360 invitation using this updated information.



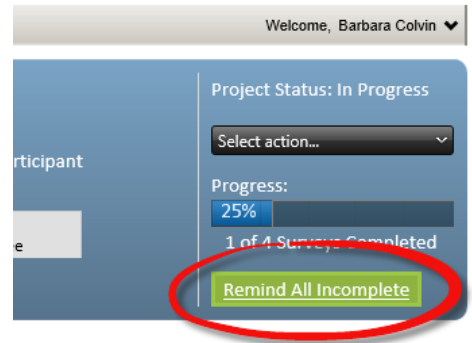
Hint:

- ✓ Use this feature to quickly re-send an invitation to someone who may have deleted or misplaced their original email. You are not required to make any changes to the user information. Just check the *Resend Original Invite* box and click [Save].

7. REMIND ALL INCOMPLETE

From the Project Dashboard, the Project Administrator can send an email notification to everyone on the project who has not yet completed their survey.

A 'Send Reminder' dialog box will appear with some sample text. Edit the text as needed, then click **[Send Reminder]** to send the email. (Use the **[Send Test]** button to send a test message to yourself before emailing everyone.)



ACCESSING RESULTS

Once all survey responses have been received, the Survey Administrator needs to close the survey. Closing the survey does two things: 1) it prevents any additional responses from being added to your project and 2) generates 360 reports for all survey participants.

1. CLOSING THE 360 SURVEY

To close the 360 Survey:

- The Survey Administrator goes to the Task list on the Project Home Page and clicks the **[Start]** button next to *Close Survey and Get Results*.

- An additional confirmation dialog box appears. To close the 360 Survey and finalize the reports, click the check box next to 'I understand and wish to finalize this 360' then click **[Submit.]**

Once the project has been closed respondents will no longer be able to submit surveys and you are returned to the project homepage.

The Project Status is now 'Completed.'

360 Research

Due Date: 03/14/2014 Reports Received By: Both Survey Administrators

Selected Scale: 360 4 point scale

1	2	3	4
Strongly Disagree	Disagree	Agree	Strongly Agree

Organizational Template [\[Save\]](#)

Admin Tasks	Respondents	Participants	Reports
Task			
[reopen]	Complete ThinkWise360 Project Setup		
Continue	99% - 72 of 72 Items Answered		
Start	Close Survey and get Results		

Finalize Confirmation

When you click submit this 360 will be final. Any outstanding respondents will not be able to finish their surveys.

I understand and wish to finalize this 360

2. ACCESSING 360 REPORTS

- A. **Reports tab** – all 360 reports can be found behind the **[Reports]** tab on the 360 Project Homepage.
- B. **Project-Level Reports** – the top half of this screen displays the project-level reports available to the Administrator. Click the **[Download]** button to open each of these Excel files.
- C. **Click Here to Run Reports** – this link takes the Administrator to a separate page from which they can decide which sections of the report they want to **download** and on which participants.
- D. **Individual Reports** – reports on each individual participant are listed in this section. To send a copy of the report to the participant, click the **[Send Report]** button.

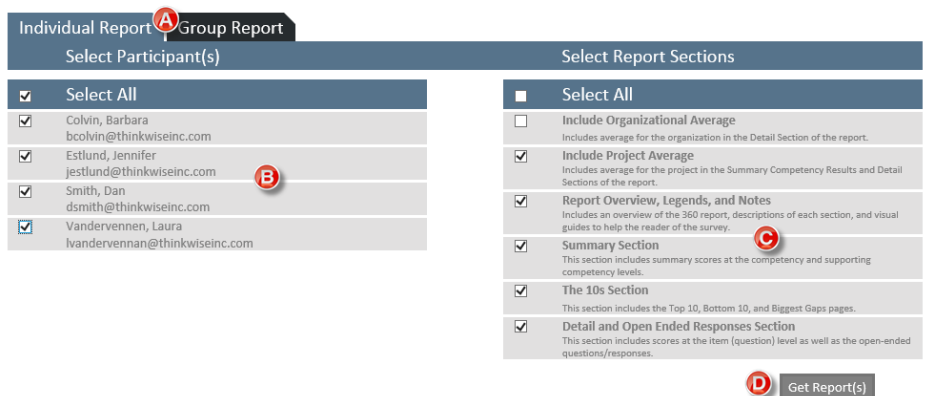


Project Reports	
Project Status Report (Excel)	Download
360 Items (Excel)	Download
Self/Manager Ratings (Excel)	Download
Click Here to Run Reports	
Send Report Link	
Colvin, Barbara bcolvin@thinkwiseinc.com	Send Report
Estlund, Jennifer jestlund@thinkwiseinc.com	Send Report
Smith, Dan dsmith@thinkwiseinc.com	Send Report
Vandervennen, Laura lvandervennen@thinkwiseinc.com	Send Report

3. DOWNLOADING PARTICIPANT REPORTS

To download one or more copies of the participant reports, first click the **[Click Here to Run Reports]** link on the project home page. If you select more than one participant, it will download as single zip file.

- A. **Individual Reports** – reports on one or more participants are available on this tab.
- B. **Select Participants** – select participants by clicking the check box next to their name.
- C. **Select Report Sections** – review the sections available and choose which to include.
- D. **Group Report** – the group report is available behind this tab.



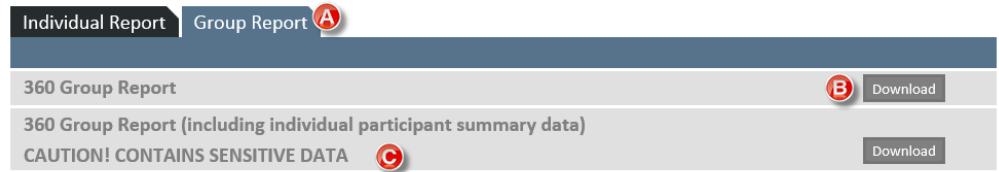
Select Participant(s)	
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Colvin, Barbara bcolvin@thinkwiseinc.com	
<input checked="" type="checkbox"/> Estlund, Jennifer jestlund@thinkwiseinc.com	
<input checked="" type="checkbox"/> Smith, Dan dsmith@thinkwiseinc.com	
<input checked="" type="checkbox"/> Vandervennen, Laura lvandervennen@thinkwiseinc.com	

Select Report Sections	
<input type="checkbox"/> Select All	
<input type="checkbox"/> Include Organizational Average <small>Includes average for the organization in the Detail Section of the report.</small>	
<input checked="" type="checkbox"/> Include Project Average <small>Includes average for the project in the Summary Competency Results and Detail Sections of the report.</small>	
<input checked="" type="checkbox"/> Report Overview, Legends, and Notes <small>Includes an overview of the 360 report, descriptions of each section, and visual guides to help the reader of the survey.</small>	
<input checked="" type="checkbox"/> Summary Section <small>This section includes summary scores at the competency and supporting competency levels.</small>	
<input checked="" type="checkbox"/> The 10s Section <small>This section includes the Top 10, Bottom 10, and Biggest Gaps pages.</small>	
<input checked="" type="checkbox"/> Detail and Open Ended Responses Section <small>This section includes scores at the item (question) level as well as the open-ended questions/responses.</small>	

[Get Report\(s\)](#)

4. DOWNLOADING THE GROUP REPORT

ThinkWise includes a group report as part of our standard 360 reporting. The information in the group report already appears in the individual participant reports, but the group report gives an easier cross-project view of the data. To download the group report:



- A. **Group Report tab** – click this tab from the reporting screen.
 - B. Click the [**Download**] button to open or save the report.
 - C. **Individual Participant version** – this version of the report is only available to ThinkWise Partner Administrators. It contains individual participant data along with the group data and should not be shared.
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