

SHL 360

Admin User Guide

This document is designed to help you quickly administer tasks within SHL 360 platform. For more detailed information and support please visit: <https://support.shl.com>

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Talent in Innovation.
Innovation in Talent.

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Introduction

360° feedback is a recognised method of collecting information that allows you to measure the competencies of individuals in your organisation objectively.

SHL's 360 is an online system that allows you to set up and manage structured 360° reviews effectively, whether for small teams or across many countries and languages.

About SHL 360

SHL 360 can be used in a wide range of scenarios. Here are some examples:

- **Performance reviews** – for individuals or groups. SHL 360 is flexible enough to allow full 360° reviews involving an individual's manager, colleagues and direct reports, or less extensive reviews for those who do not have direct reports. Feedback is requested on those competencies that relate to the job profiles of the individuals being reviewed, so results of reviews are targeted and relevant. Reports generated by SHL 360 allow organisations to give meaningful feedback to employees without compromising the anonymity of raters, thereby encouraging greater frankness during the review process.
- **Personal development plans** – for individuals or groups. By using the Occupational Personality Questionnaire (OPQ) along with the standard 360 review process you are not limited to only reviewing individuals' performance, you can also compare their performance with their potential to help identify key strengths and development needs.
- **Talent pool management** – by looking at the different profiles of employees you can clearly identify the key individuals in your organisation whose progress you wish to track more closely.
- **Multilingual projects** – 360 reviews can be arranged to cover multiple languages, so that results of reviews can be gathered and processed consistently whichever language the participants use to complete the questionnaire. The ability to run multilingual projects may be particularly relevant for organisations that wish to complete reviews involving participants located in different countries or geographical territories.
- **Multiple projects** – SHL 360 is flexible enough to allow you to run many projects at the same time while monitoring the progress of each project in detail.

Flexibility within SHL 360

SHL 360 allows you to capture the information that is most important to your organisation and its employees.

It provides individuals with information that may help in planning long-term career development or short-term development needs. Additionally, by assessing behaviours SHL 360 enables individuals to take responsibility for their own development.

- Create structured questionnaires based on the competencies that matter to your organization.
- Provide questionnaires in multiple languages.
- Manage which participants take part in the review process.
- Generate personalised reports for each focus, or for groups of foci.
- Efficiently manage communication with participants through customised email templates.
- Simplify and speed up the process of gathering feedback.
- Access results of feedback within a shorter timeframe.

SHL 360 uses a structured framework of competencies, based on SHL's *Universal Competency Framework*[™] (UCF), to help you set up reviews.

The **Universal Competency Framework** has its foundations in extensive worldwide scientific research, which examined hundreds of competency models across a wide range of different organisations around the world. The UCF sets out the key behaviours that drive performance using a standard, proven hierarchy that can be applied to virtually any job at any level, in any organisation around the world. If you require further information on using an organisation-specific competency framework, consult your SHL Account Manager.

User levels

There are several user levels in SHL 360. The options available depend on the user level assigned. Here is a summary of the roles that each user has and the actions that each can perform.

User level Permissions

User Lever	Permissions
Account Administrator	<ul style="list-style-type: none"> • Has access to all data within a specific account. • Sets up projects. • Can perform all tasks on projects. • Can add project administrators. • Can add account administrators if assigned advanced access (designated in the system by a colon after their name in the Administrators list). • Can be assigned as owner for specific projects.
Project Administrator	<p>Has access to specific projects as assigned by the Account Administrator.</p> <ul style="list-style-type: none"> • Can perform all tasks on assigned projects. • Can add project administrators. • Can add Project Administrators if assigned advanced access (designated in the system by a colon after their name in the Administrators list). • Can be assigned as owner for specific projects.
User (Restricted Access)	<p>Can view account or project data but cannot modify any data.</p>
Participant (Restricted Access)	<ul style="list-style-type: none"> • Takes part in projects as a focus or a rater. • Cannot view account or project data.

Participant types

There are five types of participants in a 360° review:



Participant Type	Description
Focus	<ul style="list-style-type: none"> The individual who is being rated. Foci also complete the questionnaire, so that their feedback show how well their own view of their working style corresponds to how others see them.
Manager	<ul style="list-style-type: none"> The person to whom the focus reports. Although individuals usually have only one manager, there may be times when an individual reports to more than one. MFS allows for more than one manager to give feedback.
Direct Reports	<ul style="list-style-type: none"> People who report into the focus. Not all foci have direct reports but MFS can still be used effectively in this situation.
Colleagues	<ul style="list-style-type: none"> People with whom the focus works. Colleagues who are usually, but not always, at the same organizational level as the focus.
Others	<ul style="list-style-type: none"> Colleagues who are usually, but not always, at the same organizational level as the focus.

Home

- **Main Menu:** View progress summaries for the selected project since the last time the administrator logged in.

User management

- **Persons in database:** Manage participant records.
- **...check for doubles:** Identify any duplicate participant records in the SHL 360 database.
- **Focus list:** Manage foci assigned to specific projects.
- **Rater's list:** Manage raters assigned to specific projects.

Questionnaire tool

- **Questionnaire:** Manage questionnaire details

System

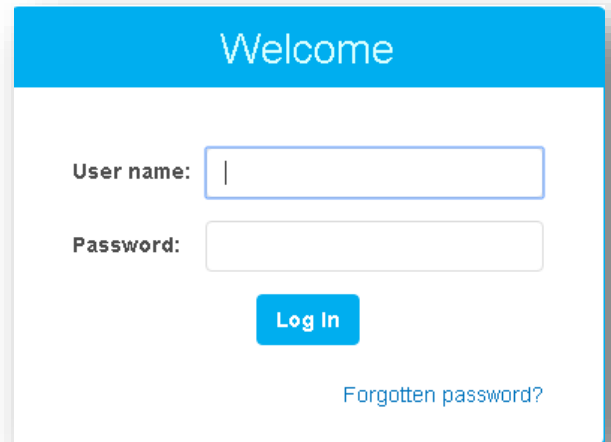
- **Administrators:** Manage administrator details
- **Account:** View the account details and the number of remaining foci
- **Project:** Manage project details
- **Groups:** Manage group details to allow you to create group reports
- **Admin Report:** Generate an administrative report detailing changes to the account, such as increasing the unit balance to make more focus units available
- **E-mail tool:** Manage email templates
- **Logout:** Log out of SHL 360

The screenshot shows the SHL 360 user interface. At the top left is the SHL logo. A dark blue navigation bar contains a 'Project:' dropdown and a 'Main menu' link. On the left is a sidebar menu with categories: 'User management' (Persons in database, Check for double, Focus list, Rater's list, Participant Tool, upload, download), 'Questionnaire tool' (Questionnaire), and 'System' (Administrators, Account, Project, Groups, Admin Report, E-mail tool, Reset Password, Logout). The main content area features a 'Welcome' header, the text 'Last login date: 10/02/2018 09:51', and a table titled 'Progress Summary'.

Overview	10/02/2018 10:45	10/02/2018 10:31	Changes
Foci in database	2	2	0
Foci in process	2	2	0
Unassigned foci	0	0	0
Person in database	15	15	0
Rater with uncompleted tasks	12	12	0
Rater with completed tasks	3	3	0
Ratings in database	16	16	0
Open ratings	12	12	0
Finished ratings	4	4	0

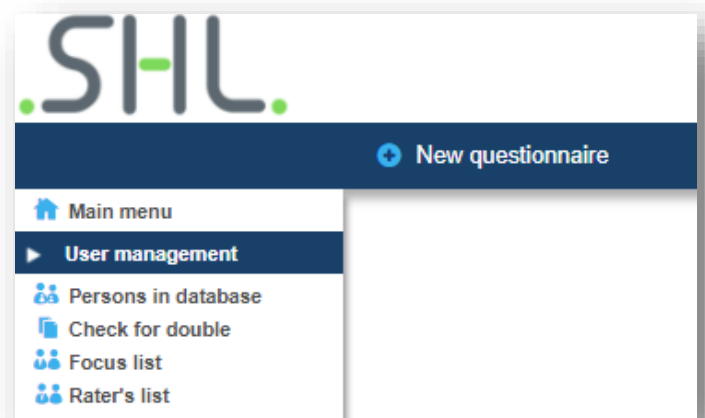
Log In

1. Navigate to the SHL 360 website
2. <https://www.feedback.mfs.shlsolutions.com/360/client/fmain.asp>.
3. Enter provided username and create a password.



Homepage


1. Once logged in, select the **Questionnaire** option from the menu on the left.
2. Then select **New questionnaire** from the Menu options bar.
3. A questionnaire will contain all your competencies, importance rating, multiple choice and open questions (where required).



Creating a Questionnaire

1. When creating a questionnaire there are **3** steps to complete, all mandatory fields are marked with a red triangle.

- If you want questions to be clearly linked to competencies in the questionnaire, select **Display competencies**.
- If you do not want it to be obvious which questions relate to which competencies, select **Display items**.
- **Fallback language** is the default language that the system reverts to for reports, if additional languages have not been defined for the open questions and multiple choice questions.

Step 1 

▶ Questionnaire name

▶ How should the questionnaire be displayed? Display Competencies Display Items

▶ fallback language

Comments

Tip – give your questionnaire a meaningful name

If you are likely to re-use a questionnaire for foci that perform similar roles, include the job title in the questionnaire name. Include the month or review period, particularly if your organisation performs different types of reviews. In a later stage when selecting the questionnaire to link to a project, all the questionnaires that are available in the account are shown in a list, so if you give your questionnaire a meaningful name at this stage it will be easier to find it in the list.

Step 2

Self	<div style="border: 1px solid #ccc; padding: 2px;"> Questionnaire Importance rating Multiple Choice Open Questions Verbal statements </div>
Manager	<div style="border: 1px solid #ccc; padding: 2px;"> Questionnaire Importance rating Multiple Choice Open Questions Verbal statements </div>
Direct Reports	<div style="border: 1px solid #ccc; padding: 2px;"> Questionnaire Multiple Choice Open Questions </div>
Colleagues	<div style="border: 1px solid #ccc; padding: 2px;"> Questionnaire Multiple Choice Open Questions </div>
Other	<div style="border: 1px solid #ccc; padding: 2px;"> Questionnaire Multiple Choice Open Questions </div>

Save & Back
Cancel
Save & next

Part	Description
Questionnaire	Includes the behavioural items in the questionnaire
Importance rating	Allows the focus and the manager to assess how important they think a skill is for success in the role in question. This option is only available for the focus and the manager
Multiple Choice	Displays any multiple-choice questions set up for your questionnaire
Open Questions	Displays any open questions set up for your questionnaire
Verbal statements	Displays a Comments box on each page of the questionnaire where raters can add comments

In order to select multiple options, keep the **(Ctrl)** button pressed when selecting more items.

Tip – You don't have to include all parts of the questionnaire for all participants

Multiple-choice and open questions may be suitable for just the focus and the manager, depending on the content of the questions.


2. Click **Save & next** to move to the next step, click **Save & Back** to save the options selected on this screen and go back to the previous step, or click **Cancel** to go back to the Questionnaire list without saving.

If you click **Save & next** the following screen appears:

Step 3

Questionnaire name	SHL KG 20
▶ Display option 'Not applicable' in questionnaire	<input type="radio"/> no <input checked="" type="radio"/> yes
Display option 'Not applicable' in importance rating	<input checked="" type="radio"/> no <input type="radio"/> yes
take competence questionnaire from	- Please select -
copy MC from	<div style="border: 1px solid #ccc; padding: 2px;"> Demo Q 2408 Demo Questionnaire Demo questionnaire 14-09-16 Demo questionnaire 27/10/2014 Demo Sarah demo.Sentember 2016 </div>
copy OQ from	<div style="border: 1px solid #ccc; padding: 2px;"> Senior Manager - CSIT Senior Manager - CSIT Senior Manager - EMEA Senior Manager - TS Senior Manager GCSC - 2017 Senior Managers - France </div>

Save & Back
Cancel
Save


DO NOT use your browser's Back button or your changes will be lost.

Note. The first time you use SHL 360, the list is empty. If you have used the system before, the list contains existing questionnaires.
View depends on User permission.

Note. The verbal statements option is only available if you selected **Display competencies** on the previous screen.

3. Enter the information for the new questionnaire:

- In the first field, select whether the response option **Not applicable** should be shown in the questionnaire.
- In the second field, select whether the response option **Not applicable** should be shown in questionnaires for focus and manager if you have selected **Importance ratings** for them in the previous step. The default is that **Not applicable** is *not* shown otherwise a focus may not complete this section.
- In the third field, select from the drop-down lists select the questionnaire you want to copy.

Note: You can copy multiple-choice questions, open questions and competency questions from different questionnaires. If you do not want to copy from existing questionnaires, do not select a questionnaire from the lists.

Note: **Not applicable** may be relevant if a rater has no evidence of how the focus demonstrates a particular competency.

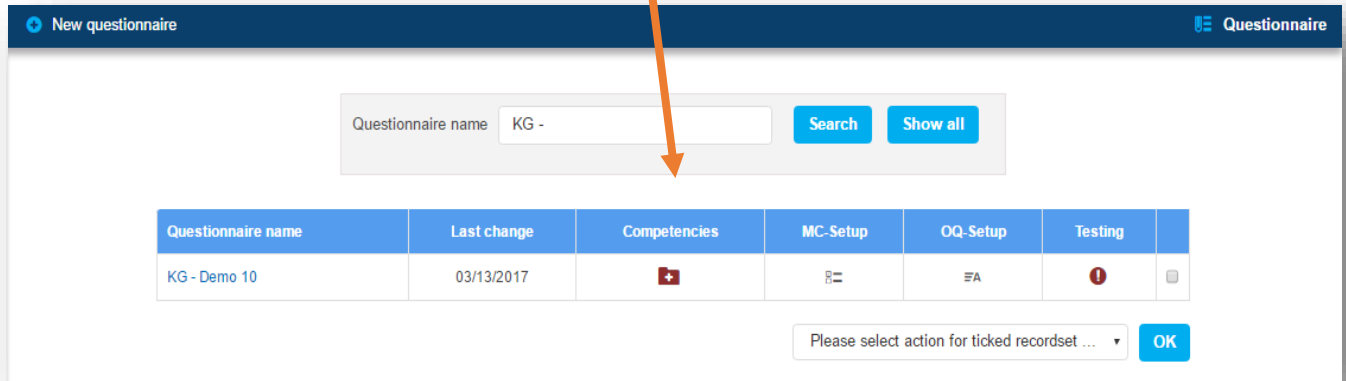
Note: If you don't select a questionnaire in the drop down list, no items will be copied.

- In the **copy MC from** field, from the scrolling list select the questionnaire you want to copy multiple-choice questions from.
- In the **copy OQ from** field, from the scrolling list select the questionnaire you want to copy open questions from.

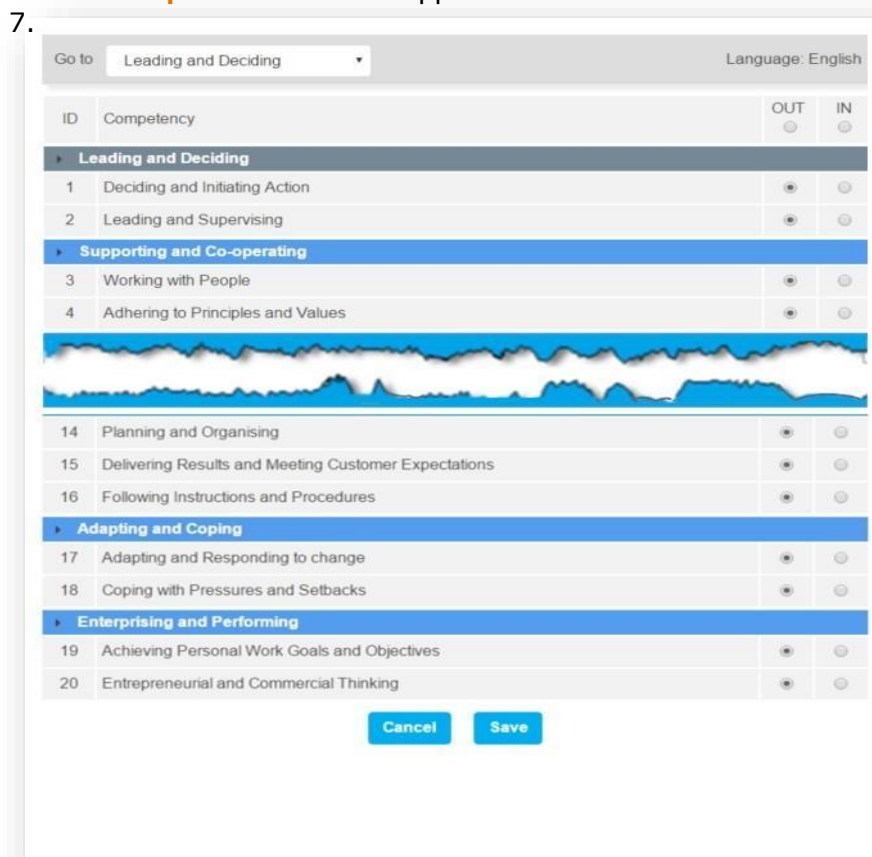
4. Click **Save** to save your selections and go to the questionnaire list, click **Save & Back** to save the options selected on this screen and go back to the previous step, or click **Cancel** to go back to the Questionnaire list without saving.

5. Once you have created a questionnaire, the questionnaire is shown on the **Questionnaire** screen. If you did not copy a list of competencies from a previous questionnaire, the **Competencies** field is displayed in red text, to remind you that the list of competencies is empty. If you copied a list of competencies from a previous questionnaire, you may need to edit the list.

6. To edit the list of competencies, click **Competencies** in the same row as the questionnaire name.



The **Competencies** screen appears:



You can add or remove competencies at any time while you are setting up the questionnaire, but once you have launched the questionnaire you cannot edit the competency list.

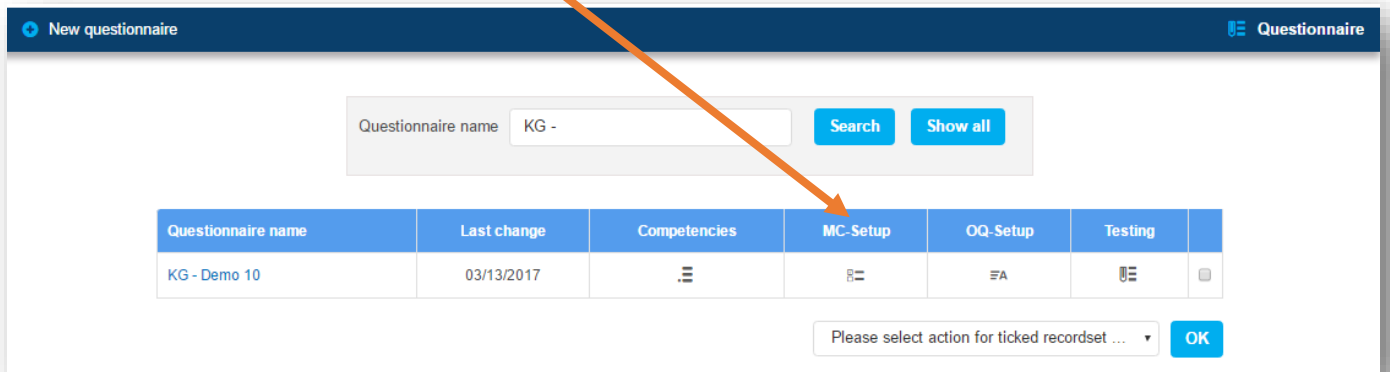
9. To add a competency, click the **In** option beside the relevant competency, to remove a competency, click the Out option.

Use the drop-down list at the top of the page to go quickly to the required competency section, or use the scroll bar to scroll down.

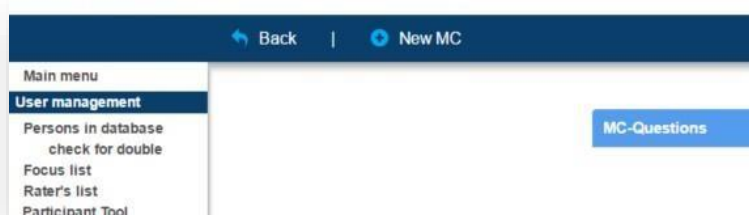
When you have finished making your selection, scroll to the end of the list and click **Save** to return to the Questionnaire screen.

To add and define multiple-choice questions

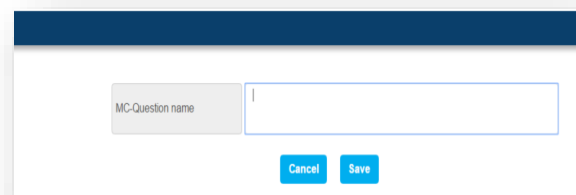
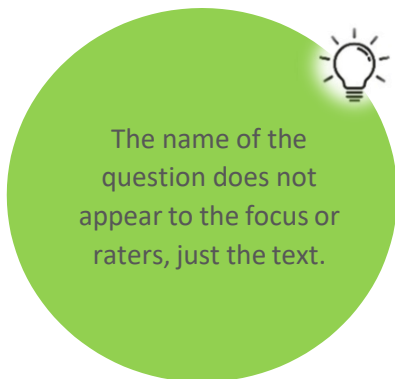
1. To add multiple-choice questions, on the **Questionnaire** screen click **MC-setup** in the same row as the questionnaire name. The main **MC-setup** screen appears:



2. On the menu options bar, click **New MC**. The following screen appears:



3. Referring to your planning template, enter the *name* of the question (*not the text of the question*).



Tip – give your questionnaire a meaningful name

It is particularly important to have meaningful names for your questions if you are planning a multilingual project, as question names are not translated. Using meaningful question names allows you to check which questions are included in a questionnaire, even if you don't speak the language the questionnaire used.

- Click **Save** to save your question name, or click **Back** to return to the **MC-Setup** screen without saving.

If you click **Save**, the following screen appears:

The screenshot shows the 'MC-Setup' interface. At the top, there are 'Back' and 'New MC' buttons. Below is a table with the following content:

MC-Questions	Edit	
Innovation		Define MC-Questions <input type="checkbox"/>
Empathy		Define MC-Questions <input type="checkbox"/>

At the bottom of the table, there is a dropdown menu with the text 'Please select action for ticked recordset ...' and an 'OK' button.

- To define the question, click **Define MC-Questions** in the same row as the name of the question you wish to define. The screen on the following page appears. Note that the default language, in this example English, is shown in the **Language** column.
- Enter the text of the question in the default language as you want it to appear in the questionnaire and click **Save MC-Block**.

The screenshot shows the 'Define MC-Block' screen. It features a 'Back' button at the top left. Below it, there are two input fields: 'MC - question' and 'Language'. The 'MC - question' field contains the text 'How would you rate this persons| day to day management?'. The 'Language' field contains 'English'. At the bottom center, there is a blue 'Save MC-Block' button.

- Enter the response options you wish to include.

The screenshot shows the 'Define MC-Block' screen with response options. It features a 'Back' button at the top left. Below it, there are two input fields: 'Language' and 'MC - question'. The 'Language' field contains 'English'. The 'MC - question' field contains the text 'How would you rate this persons' day to day management?'. Below these fields, there are ten rows of 'Options' input fields, labeled 'Options 1' through 'Options 10'. The first four options are filled with the text 'Excellent', 'Fair', 'Good', and 'Poof'. At the bottom center, there are two buttons: 'Cancel' and 'Save'.

To add and define open questions

1. To add open questions, on the **Questionnaire** screen click **OQ-setup** in the same row as the questionnaire name.

The main **OQ-setup** screen appears:

Questionnaire name	Last change	Competencies	MC-Setup	OQ-Setup	Testing
KG - Demo 10	03/13/2017	☰	☰	☑	☰

2. On the menu options bar, click **New OQ**.

Question Name	Input required			



You can add and delete questions at any time while you are setting up the questionnaire, but once you have launched the questionnaire you cannot add, edit or delete questions.

The following screen appears:

Back

▶ Question Name Leading & Deciding

▶ Input required no yes

▶ Only visible to selected rater categories

Self	<input checked="" type="checkbox"/>
Manager	<input checked="" type="checkbox"/>
Direct reports	<input checked="" type="checkbox"/>
Colleagues/internal clients	<input checked="" type="checkbox"/>
Others	<input checked="" type="checkbox"/>

Cancel Save

3. Define whether input is required or whether the participant can leave the answer blank. Click **yes** if an answer is mandatory, click **no** if an answer is optional. You can decide whether certain open questions should be displayed for everyone or certain categories. Simply check the boxes next to the categories.
4. When you click **Save**, the following screen appears:
5. Enter the **text** of the question in the default language as you want it to appear in the questionnaire and click **Save**

Back

Question Describe a situation where the focus had to take responsibility for a group or a project

Language English

Save

Multilingual

If you are setting up a questionnaire for multilingual participants and you already have a translation for the question, you can enter it now.

1. Select the language for the question from the drop-down list.
2. Enter the text of the question in the required language as you want it to appear in the questionnaire and click Save.

6. Repeat steps 2 – 7, and multilingual steps if necessary, until you have added all the questions you require.

On the menu options bar, click **Back** to return to the main **OQ-setup** screen.

Testing questionnaires

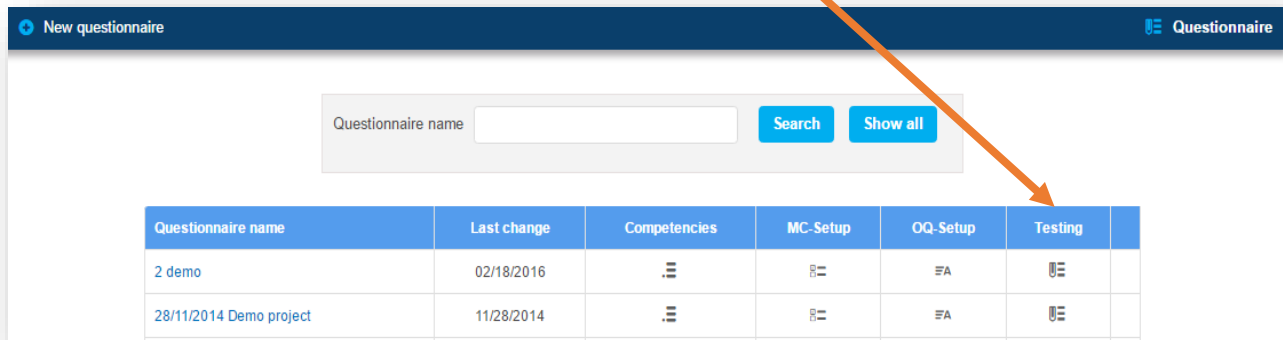
When you have set up a questionnaire, it is important to test how it appears to each participant type before it is launched, to ensure that the questionnaire displays correctly to each participant type that will use it. This is particularly important if you are using open questions or multiple-choice questions.

The questionnaire is displayed differently depending on whether you set it up to display competency names or to display items.

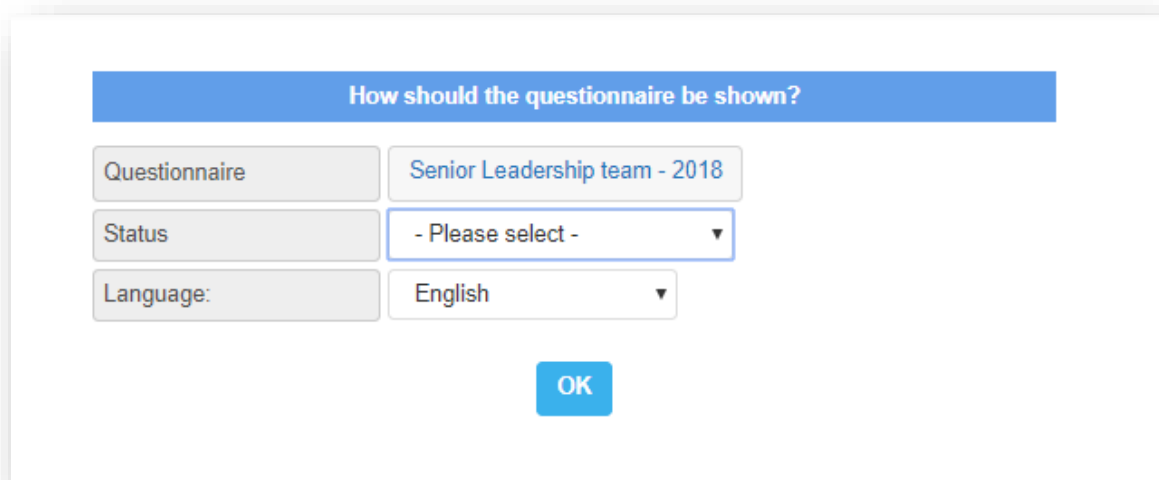
The indicator at the bottom of the screen shows that there are 9 pages in the questionnaire, but the page itself is relatively short. The example is also showing the questionnaire where **display competencies** was selected on the first **Questionnaire** screen.

The screenshot shows a self-assessment questionnaire interface. At the top, there is a blue header with the text "Interrupt and save" on the left and "Self assessment (360° questionnaire)" on the right. Below the header, there is a blue bar with the text "Leading and Supervising" and a progress indicator showing 5 steps, with the first step highlighted. Below this, there is a list of competencies with corresponding progress indicators (radio buttons) for each. The competencies are: "Delegates work to others on the basis of their abilities and resources available to them", "Provides others with a clear direction", "Identifies and recruits high-calibre individuals", "Identifies development needs and provides resources to support learning", "Provides others with constructive feedback and guidance on how they may best apply their talents", "Monitors others' behaviour to ensure appropriate standards are met", and "Inspires enthusiasm and a positive work attitude in others". At the bottom, there is a navigation bar with a "< Back" button, a dropdown menu showing "1" of "9", a "Go to" button, and a "Next >" button.

1. From the **Questionnaire** list screen, click the **Testing icon** in the same row as the questionnaire you want to test. The **Testing** screen appears:



2. From the **Status** drop-down list, select the participant type, choosing from **Self** or one of the other rater types. Select the language (where available) you wish to test and click **OK**. The first page of the competency part of the questionnaire is now displayed exactly as the participant type you selected will see it.



3. To move through the questionnaire, click **next >** or **< back** below the displayed questions or select the page number from the drop-down list at the bottom of the screen and click **Go to**.
4. If you need to edit the questionnaire, click **Interrupt and save** to return to the main **Questionnaire** list screen and then click on the part you wish to edit.
5. Repeat steps 1 – 4 for each of the participant types.

Tip – check all open and multiple-choice questions carefully
If you have chosen to use multiple-choice or open questions for the focus and other participant types, check that the wording is applicable to all participant types.

Creating and editing projects

Once your questionnaire has been set up and tested, you need to create a new project. The review process is carried out at a project level and is controlled by an **owner**. The **owner** is an administrator allocated to the project who takes overall responsibility for it, although additional administrators can be allocated to assist.

To create a new project

1. On the menu list, click **Project**. Click on **New Project** on the menu options bar:

The screenshot shows the 'New project' page with a search bar and a table of projects. The search bar has a dropdown for 'Project name' and buttons for 'Search' and 'Show all'. The table below lists two projects:

Project name	Owner	Status	Start date	Report
2 demo	System Training	Active		
2016 demo march	System Training	Active	31/03/2016	

The following screen appears:

The screenshot shows the project creation form. Fields marked with a red arrow (mandatory) are: Project name, Owner, Status, Standard language for emails, Questionnaire, and Total min. number of raters. The form includes a 'Comments' text area and a table for 'Role' with columns for 'Min number of raters', 'Ideal number of raters', and 'Open Question status'.


Role	Min number of raters	Ideal number of raters	Open Question status
Self	<input checked="" type="checkbox"/>	-	-
Manager	<input type="checkbox"/>	0	0
Direct Reports	<input type="checkbox"/>	0	0
Colleagues	<input type="checkbox"/>	0	0
Other	<input type="checkbox"/>	0	0

ONLY Account Admins can create projects.


Mandatory fields are marked with a red arrow and must be completed.

2. Referring to your planning template, enter the required information for the new project.


- In the **Owner** field, select from the drop-down list, the name of the administrator who will take charge of the project. The **Owner** can be an account administrator or a project administrator.
- In the **Start date** field, enter the date that the project is planned to start.
- In the **Status** field, from the drop-down list select **Active** or **Not active**.
- Add any comments you may have in the **Comments** field, for example the purpose of the project as you defined it in the project planning template.
- From the **Questionnaire for project** drop-down list, select the questionnaire that you **want to link to the project**.
- Set the **minimum** and *ideal* numbers for raters in the project, and the minimum total number of raters. You can deactivate certain categories, if you do not meet a minimum of two (except Managers).



If you edit the questionnaire during testing, make sure you re-test the elements you have changed for the participant types that you have already tested to ensure if you are still happy with the result.



The drop-down list contains all the available questionnaires in the account.



The default language selected on the **Project editor** screen refers only to the language for project emails, not to the language for questionnaires or the SHL 360 user interface.

Tip – set the status to Active

Setting a project's status to Active means that the project is shown in drop-down lists, allowing you to add participants to the project from several screens, including Persons in database, Focus list and Rater's List. When a project's status is Active, tasks that you assign to raters are shown on their task lists once the project is launched.

Not active is most useful at the end of a project when all ratings have been completed and you no longer wish the project to be shown in drop-down lists.

- From the drop-down list, select the default language for emails.

Tip – set a minimum of two raters for each rater type that you want to include (except Manager).

For each rater type that you want to include, ensure that Min number of raters is set to at least two, to maintain anonymity in the reports at the end of the process.

If there are fewer than two raters of types Direct reports, Colleagues or Other, or if fewer than two of those rater types respond, ratings from that rater type will not appear in reports.

3. Click **Save** to save your project.

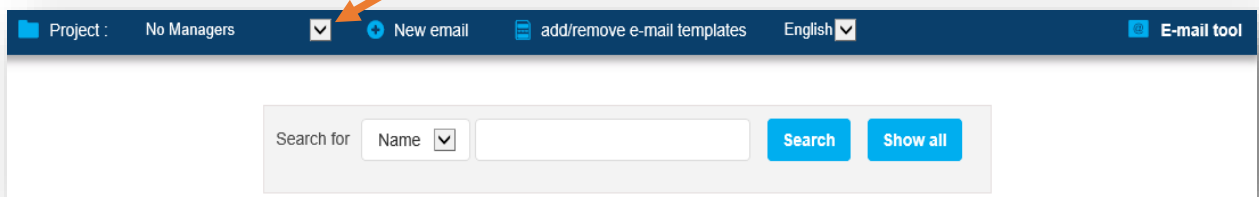
Setting up email templates

It is essential that participants in a 360° review process are told which tasks they are expected to complete, how to complete them and when they are expected to complete them. SHL 360 uses a set of email templates to communicate with foci and raters, and tracks when emails are sent so that administrators can quickly see what stage a project has reached.

You can attach default templates to your project in SHL 360 which you can then edit to include project-specific details, instead of having to create every email from scratch. Each of the default emails has an ID number associated with it, from **0 to 8**.

ID	E-Mail name	Intended recipient	Description
0	E-Mail without content	Any, as required	<ul style="list-style-type: none"> No default content Allows you to create your own custom email that can be sent to users in all languages.
1	E-Mail check	All project Participants	<ul style="list-style-type: none"> Asks the recipient to confirm receipt of the email Send this email for all participants to check that the correct email addresses are in SHL 360.
2	Define Rater - Start up	Focus, if focus is defining the raters	<ul style="list-style-type: none"> Gives the link to SHL 360 and the focus' user name and password Asks the focus to define raters This email is not required if the administrator defines the raters for each focus.
3	Define Rater - Reminder	Focus, if focus is defining the raters	<ul style="list-style-type: none"> Reminds the focus to define raters
4	Rating - Start up Foci	Focus, when rating Starts	<ul style="list-style-type: none"> Informs the focus of the link to SHL 360 Informs the focus that tasks have been assigned to raters Asks the focus to complete the questionnaire
5	Rating - Start up Rater	Rater, when rating Starts	<ul style="list-style-type: none"> Gives the link to SHL 360 and the rater's user name and password Gives an explanation of the 360° process Asks the rater to complete the tasks assigned
6	Rating - Reminder 1	Rater, when rating has started	<ul style="list-style-type: none"> Reminds the rater to complete the tasks assigned
7	Rating - Reminder 2	Rater, when rating is Due	<ul style="list-style-type: none"> Reminds the rater to complete the tasks assigned
8	Rating - Reminder 3	Rater, when rating is Due	<ul style="list-style-type: none"> Reminds the rater to complete the tasks assigned

1. On the menu list, click **E-mail tool**. The **E-mail tool** screen appears:
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.



A list of default emails appears:

ID	Name	Subject	Language	Edit
0	Mail without content	Subject	English	
1	E-Mail check	360 process	English	
2	Define Rater - Start up	360 process - Choose feedback provider	English	
3	Define Rater - Reminder	360 process - Reminder for choosing feedback provider	English	
4	Rating - Start up Focus	Start of 360 Process	English	
5	Rating - Start up Rater	Start of 360 Process	English	
6	Rating - Reminder 1	Reminder 1 of 360° Process	English	
7	Rating - Reminder 2	Reminder 2 of 360 Process	English	
8	Rating - Reminder 3	Reminder 3 of 360 Process	English	

Please select action for ticked recordset ...

By default, the most recent project you worked on is shown.

Edit the subject line to include an identifier for the project.

3. Edit the name of the email template and the subject as required. Click **Cancel** to return to the **E-mail tool** screen without saving, or click **OK** to save your changes and return to the **E-mail tool** screen.


4. To edit the content of an email, from the **E-mail tool** screen, click the name or subject of the email you wish to edit. The email edit screen appears:

5. If you wish to include the variables, taken mostly from the **Editor** screen in **Persons in database**, type in the codes as follows:


Variable	What is displayed when emails are generated
\$RCPFIRSTNAME	The name that is defined in the First name field on the participant Editor screen
\$RCPLASTNAME	The name that is defined in the Last name field on the participant Editor screen
\$USERID	The user name that is defined in the User name field on the participant Editor screen
\$USERPW	The password that is defined in the Password field on the participant Editor screen. Note: Participants will create a password on initial Login.
\$UNIQUELINK	The unique link the foci and raters use to complete the questionnaire
\$PROGRAM	Please overwrite the metatag with the name of the review you are running (use a meaningful name)

Note: The default email templates contain variables which, when the email is sent, are substituted with data about the recipient such as first name, last name, user ID and password as they appear on the **Editor** screen. The \$Program variable needs to be amended manually. Please give a meaningful name.

6. Edit both the **male** and **female** versions of the emails, as the versions sent are defined by the participant's gender.



The no gender version of email templates is provided in case the gender of participants is not known.



Do not use your browser's Back button or your changes will be lost.

Tip – edit both male and female versions

SHL 360 provides male and female versions of email templates, to allow you to customise email templates appropriately for participants of both genders, for example to include a title if required. Overwrite any information provided with brackets and stars (e.g. Deadline date, sender, first line support contact details).

7. Click **OK** to save your changes and return to the **E-mail tool** screen, or click **Cancel** to return to the **E-mail tool** screen without saving.

Tip – if you regularly use the same emails, keep a text file on your computer

If you use the same email text for all your projects, save the text from your emails into a separate text file. When you want to modify emails for a new project, copy and paste the text from your own saved file rather than re-typing.

To create your own email templates

In addition to emails reminding participants of the tasks they are required to do, you may wish to create additional customised email templates. For example you may wish to inform the participants of the objectives of the review they are about to take part in, give a more detailed explanation of the review process, or interest them in setting up similar reviews for their own teams.

Multilingual

If you are running a multilingual project, use this method to create email templates that are available for all project participants.

If you wish to create additional emails to be used for participants in several languages, modify the first email in the list, Mail without content, as described above. This email does not contain any text in any language so is available for you to use as you wish.



Use variables in your custom templates to send personalised emails for each recipient. Using variables means that you do not need to edit every email manually, so saving you time and effort in the project and increasing consistency within the 360° process.

Adding and editing participant records

Before the feedback process can start, all participants must be registered in the database. If foci are responsible for defining raters, you only need to ensure that all foci for your project have been added to the database, as foci can add participants themselves when defining their rater lists. If administrators are responsible for defining raters, all raters also need to be registered in the database.

There are several ways to add participants:

- From the **Persons in database** screen
- From the **Raters list** screen
- While the focus is defining a list of raters

The first time you use SHL 360 there will not be any participants in the SHL 360 database. When SHL 360 has been in use for some time, the database will contain records for all participants that have taken part in previous reviews.

If the database is large it is possible that the participants you need to add may already be registered in the database. It is advisable to perform a search before adding a new participant to prevent you creating duplicate records.



To search for participants

1. On the menu list, click **Persons in database**. The **Persons in database** screen appears:

Title	Name	E-mail	email date	confirm date	Ratings total/start/done/sent	Assign to project	All
Mr	Darran King	noreply@shl.com			1 / 0 / 0 / 0		
Mr	David Brown	noreply@shl.com			1 / 0 / 0 / 0		
Mr	David Focus	noreply@shl.com			2 / 0 / 0 / 0		
Mr	David Focus	noreply@shl.com			1 / 0 / 0 / 0		
Mr	David Frost	david.frost@shl.com			1 / 0 / 0 / 0		
Mr	David King	dking2@noreply.com			0 / 0 / 0 / 0		
Mr	David King	dking@shl.com			1 / 0 / 0 / 0		
Mr	David King	kaveri.glenham@shl.com			2 / 0 / 0 / 0		
Mr	David King	dking2@noreply.com			3 / 0 / 0 / 0		
Mr	David Malroy	njfds@gjs.com			1 / 0 / 0 / 0		

2. From the **Search for** drop-down list, select **Surname**, **First name** or **E-mail**.
3. In the search field enter the text that you want to search for and click **Search**.
4. The list of participants is filtered according to the criteria you entered.
5. To clear the search, click **Show all**. The full list of participants is displayed.

To add participants

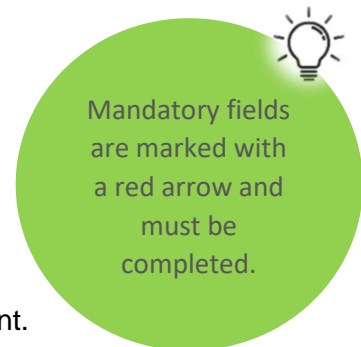
1. From the **Persons in database** screen, on the menu options bar click **New participant**. The **Editor** screen appears:

The screenshot shows a web form for adding a new participant. At the top left is a 'Back' button with a left-pointing arrow. The form consists of several rows of input fields. The first row is 'Title' with a dropdown menu showing '- Please select -'. The next three rows are 'Forename', 'Surname', and 'E-mail', each with a text input field. The next row is 'Personal number (ID)' with a text input field. The next row is 'Country' with a dropdown menu showing '- Please select -'. The next row is 'Region' with a text input field. The next row is 'Function' with a text input field. The next row is 'Level' with a text input field. The next row is 'Language (E-mail)' with a dropdown menu showing '- Please select -'. The final row is 'Comments' with a larger text input area. At the bottom right of the form are two buttons: 'Cancel' and 'Save'. Red arrows point to the left of the 'Title', 'Forename', 'Surname', 'E-mail', and 'Language (E-mail)' fields, indicating they are mandatory.

2. Enter **mandatory** details for the new participant.
 - In the **Title**, **Forename** and **Surname** fields, enter the personal details.
 - In the **E-mail** field, enter the email address for the participant.
 - In the **Country** drop-down list, enter the country of the participant if applicable.

This password will be created by each participant upon initial login.

3. In the **Language (E-mail)** field, enter the language for emails sent to the participant.
 - Enter optional details for the new participant, if required.



When a participant is assigned to a project, emails will be sent using the language defined on this screen, if the project has been set up to include this language. If the project does not include the participant's language as defined on this screen, emails will be sent using the default language for the project.

It is important to enter email addresses correctly, as the email address is the means for communicating with participants and distinguishing them from others in the database.

- Use the **Personal number (ID)**, **Region**, **Function** and **Level** fields to add additional sort details.
- When you have finished entering details, click **OK** to save the participant record or click **Cancel** to return to the **Persons in database** screen without saving.
- If you click **Save**, the **Persons in database** screen appears, with a filter applied based on the email address. The filter is applied automatically, to help you check for duplicated records.



When you type a single letter, the list jumps to display the first country starting with the letter you type.

In this example, the email address is unique:

The screenshot shows the 'New participant' interface. At the top, there are two tabs: 'New participant' (active) and 'Persons in database'. Below the tabs is a search bar with a dropdown menu set to 'E-mail', a text input field containing 'dking2@noreply.com', and a 'Search' button. To the right of the search bar is a 'Show all' button. Below the search bar is a 'Show' dropdown menu set to '10 records'. Below the search bar is a table with the following columns: Title, Name, E-mail, email date, confirm date, Ratings total/start/done/sent, Assign to project, and All. The table contains one record for David King with the email address dking2@noreply.com. Below the table is a 'Please select action for ticked record set:' dropdown menu and an 'OK' button. At the bottom of the page, it says 'Page 1/1'.

Title	Name	E-mail	email date	confirm date	Ratings total/start/done/sent	Assign to project	All
Mr	David King	dking2@noreply.com			0 / 0 / 0 / 0		

Tip – include details that are relevant for your organisation

Suitable details might include the participant's employee number or national insurance number in the Personal number (ID) field.

Use the Region, Function and Level fields to add details about the participant's job role and function within your organisation, such as department within the organisation, geographical location or level of seniority or pay-scale.

If you have entered a participant's details but the participant is already in the database, the filtered screen shows both entries. In this example, two records in the database contain the same email address:

The screenshot shows the 'Persons in database' interface. At the top, there are two tabs: 'New participant' and 'Persons in database'. Below the tabs is a search bar with a dropdown menu set to 'E-mail' and a text input containing 'dking2@noreply.com'. There are buttons for 'Search' and 'Show all'. Below the search bar is a 'Show' dropdown menu set to '10 records'. The main content is a table with the following columns: Title, Name, E-mail, email date, confirm date, Ratings total/start/done/sent, Assign to project, and All. There are two rows for 'David King' with the email 'dking2@noreply.com'. The first row has a lighter blue background for the Name column and a Rating of '0 / 0 / 0 / 0'. The second row has a darker blue background for the Name column and a Rating of '1 / 0 / 0 / 0'. Below the table is a dropdown menu with the text 'Please select action for ticked record set:' and an 'OK' button. At the bottom center, it says 'Page 1/1'.

Title	Name	E-mail	email date	confirm date	Ratings total/start/done/sent	Assign to project	All
Mr	David King	dking2@noreply.com			0 / 0 / 0 / 0		
Mr	David King	dking2@noreply.com			1 / 0 / 0 / 0		

In the first row, note that the participant's name is shown on a slightly darker blue background, indicating that he is included in a project as a focus. In the **Ratings** column there is a value greater than zero, indicating that he has been included as a rater for a project. The orange background indicates that there are outstanding ratings on this participant.

In the first row the participant's name is shown on a lighter blue background, indicating that he has not been included in a project as a focus and all the values in the **Ratings** column are zero.

In this example, the first record should be deleted.

To delete participants

- From the **Persons in database** screen, click the checkbox in the same row as the participant you want to delete. Filter using the **Search for** area at the top of the screen if necessary.
- From the dropdown list at the bottom of the list of participants select **Delete** and click **OK**. The **Persons in database** screen appears and the participant is no longer on the list.

To edit participant records

You can edit participant records at any time, even during an active project:

1. On the menu list, click **Persons in database**. The **Persons in database** screen appears. If necessary, search for the participant whose record you wish to edit.
2. Click on the name of the participant whose record you wish to edit. The **Editor** screen appears.
3. Edit the details as required and click **Save** to save your changes.

To check for duplicates

Occasionally it may happen that participant records are duplicated in the database, particularly if the database is large and has several administrators working on it. It is good practice to check for duplicate records from time to time, particularly when a new project is about to start.

1. On the menu list, click **...Check for double**. A list of participants whose email addresses are duplicated appears.
2. Check each record to see if there are any records that have not had any tasks associated with them.

Check the following:

- Participant is not defined as a focus for any project. If a participant has been defined as a focus, the background colour to the name in the participant list is darker blue.
- Participant does not have any outstanding ratings. If a participant does not have any outstanding ratings, the **Ratings** column will only contain zero values.



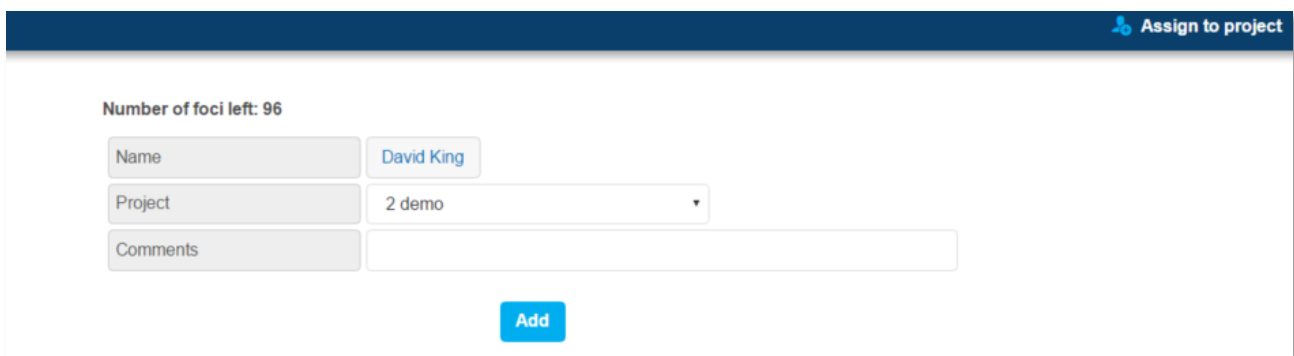
The number of foci remaining in the account is shown at the top. If there are three foci or less remaining in the account, you will be reminded to increase the number of foci. To do so, contact your SHL Account Manager.

Assigning foci to a project

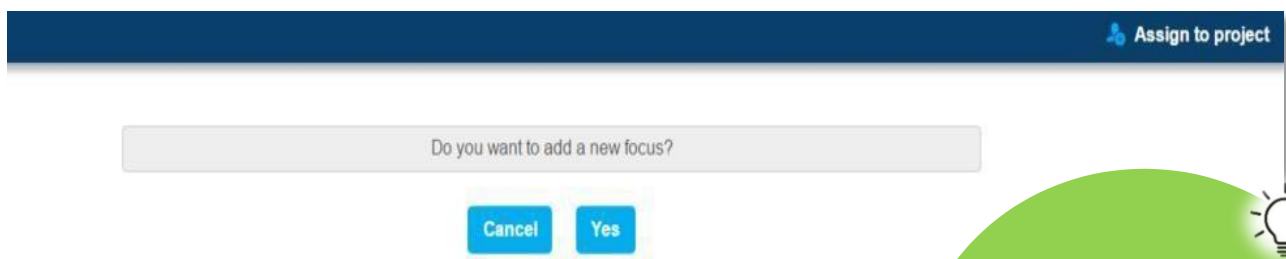
Once the database contains the names of the foci for your project, you can assign them to the project. You can either assign participants as foci as you add them, or add all the foci at the same time and then assign them later.

To assign a focus to a project


1. On the menu list, click **Persons in database**. If necessary, search for the participant who you want to assign as a focus.
2. On the **Persons in database** screen, click **Assign to project** on the same line as the participant you wish to assign. The **Assign to project** screen appears.
3. From the **Project** drop-down list, select the project you wish to assign the participant to and click **Add**. A message appears asking you to confirm that you want to add a new focus to the project.



4. To assign the participant as a focus to the selected project, click **Yes**. Click **Cancel** to return to the **Assign to project** screen without assigning the participant.



5. If you click **Yes**, the **Assign to project** screen appears, showing the projects that the participant has been assigned to.



Account administrators can assign foci to any project in the account. Project administrators can only assign foci to projects they have been allocated to.

6. Repeat step 5 as often as required to assign the participant to additional projects. Click **Back** to return to the **Persons in database**

screen.

The number of available foci in the account reduces by one each time you assign a focus to a project. If you think you will require more foci for your project than are currently available, contact your SHL Account Manager to add more foci.

To remove a focus from a project

There may be times when you need to remove a focus from a project, for example if you have assigned a focus to a project in error or a participant leaves the company.

1. From the **Assign to project** screen, click the checkbox in the same row as the project you want to remove the focus from.
2. From the dropdown list at the bottom of the list of projects select **Delete** and click **OK**. The **Assign to project** screen appears and the project is no longer on the list.



Assigning tasks to foci

Tasks that you assign to foci are always linked to a project. Depending on who defines raters, the tasks that are assigned to foci are slightly different, so it is important to make that decision before you start your project.

Tasks that can be assigned to foci are:


- Respond to the self-rating questionnaire
- Define feedback provider

If an administrator defines the raters

If you or other administrators are responsible for defining raters in SHL 360, you will **not**

need to ask the focus to define feedback providers.

By the time you need to work in SHL 360 you should have received the names and details of raters for each focus, from line managers or whoever is responsible. It is advisable to gather data on raters using the project planning template so that when you come to input rater information in SHL 360, all the information you need is readily available.




If you remove a focus from a project, the number of foci left in the account remains the same, SHL 360 does not add to the number of foci available.

If focus defines the raters

If the focus is responsible for defining raters in SHL 360, you will need to ask the focus to define feedback providers.

To assign tasks to foci

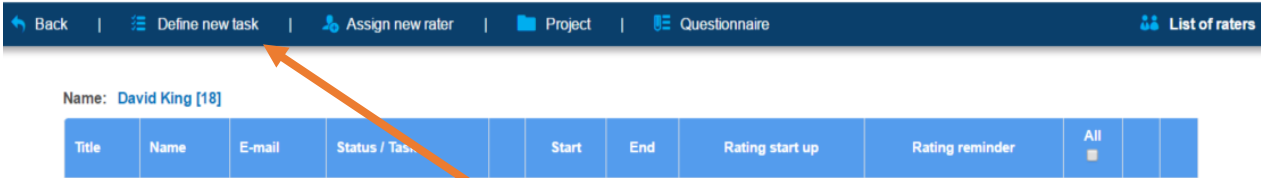
1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.
3. The **Focus list** screen appears, showing all the foci that have been assigned to the project.
4. Click the numbers in the **Task status** column, in the same row as the name of the focus.



If the raters have not yet been defined for the focus, the list is empty and just the headings are shown.

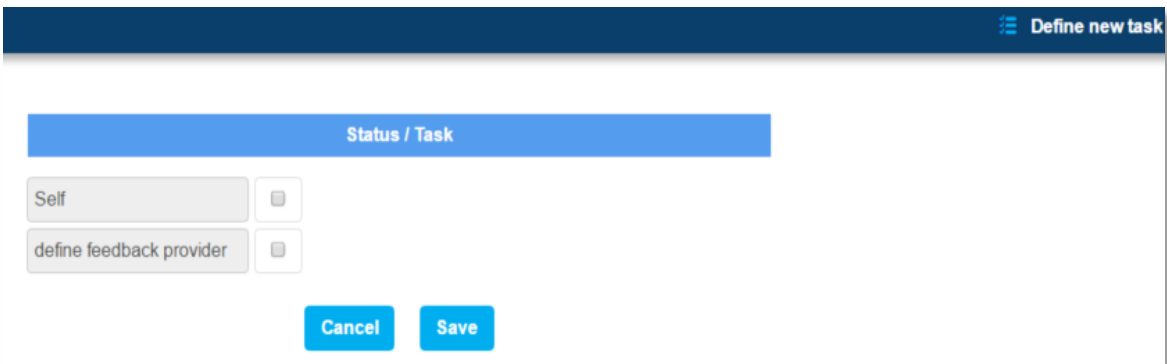
Title	Name	E-mail	Focus start up	Focus reminder	Task status total/start/done/sent	All	Edit	Mail	Report
Ms	Susan Day	kaveri.glenham@shl.com	03/14/2014		3 / 0 / 0 / 0	<input type="checkbox"/>			
Mr	David King	dking2@noreply.com	03/14/2014		0 / 0 / 0 / 0	<input type="checkbox"/>			

The following screen appears:



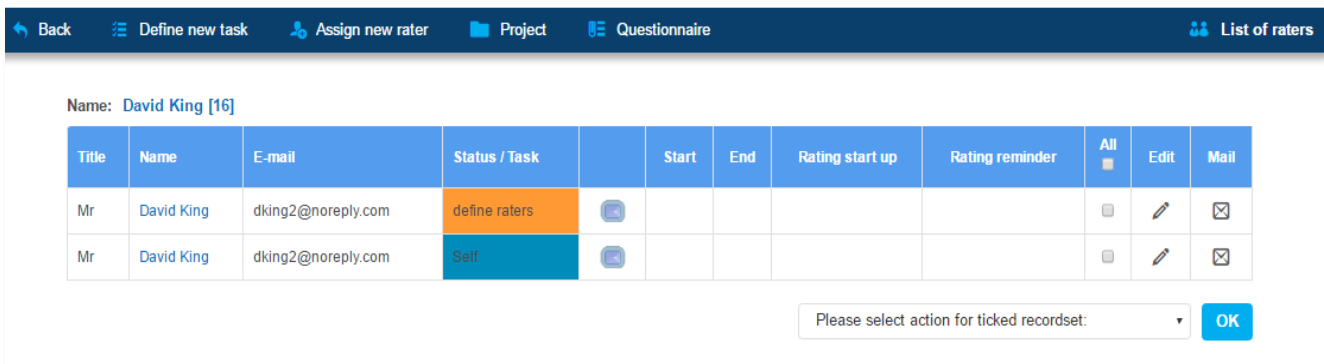
- On the menu options bar, click **Define new task**.

The **Define new task** screen appears:



- Click the checkbox beside the tasks that you wish to assign to the focus.
 - Click the checkbox beside **Self** to assign the task of completing the questionnaire.
 - Click the checkbox beside **define feedback provider** to assign the task to the self to nominate the raters themselves.
- Click **OK** to assign the selected tasks and return to the **List of raters** screen, or click **Cancel** to return to the **List of raters** screen without saving.

If you clicked **OK**, the **List of raters** screen appears:



To delete tasks from foci

1. From the **List of raters** screen, click the checkbox in the same row as the task you want to delete.

To select all tasks on the list, click the **All** checkbox in the heading row.

2. From the dropdown list at the bottom of the list of tasks select **Delete** and click **OK**.

Defining rater lists

Rater lists can be defined by administrators, by foci, or a combination of both.

If administrators are responsible for defining rater lists, you do not need to involve the focus until the project is launched. If foci are responsible, or partly responsible for defining rater lists, you need to assign them the task of defining raters, inform them of the task assigned to them and monitor progress while they are defining their rater list.



There is a separate line for each task assigned, so it is possible that one participant's name can appear on several lines.

Tip – You can define some of the raters and let the focus define others

You can define some of the raters and then request the focus to define the rest. For example you may be required to define the manager and direct reports, but allow the focus to define raters in the Colleagues and Others types.

To define raters for a focus (administrator task)

1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.

The **Focus list** screen appears, showing all the foci who have been assigned to the project.

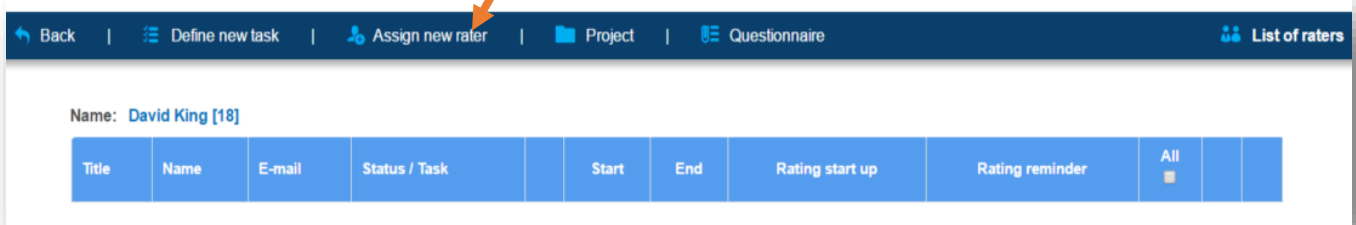
3. Click the numbers in the **Task status** column, in the same row as the name of the focus

Title	Name	E-mail	Focus start up	Focus reminder	Task status total/start/done/sent	All	Edit	Mail	Report
Ms	Susan Day	kaveri.glenham@shl.com	03/14/2014		3 / 0 / 0 / 0	<input type="checkbox"/>			
Mr	David King	dking2@noreply.com	03/14/2014		1 / 0 / 0 / 0	<input type="checkbox"/>			

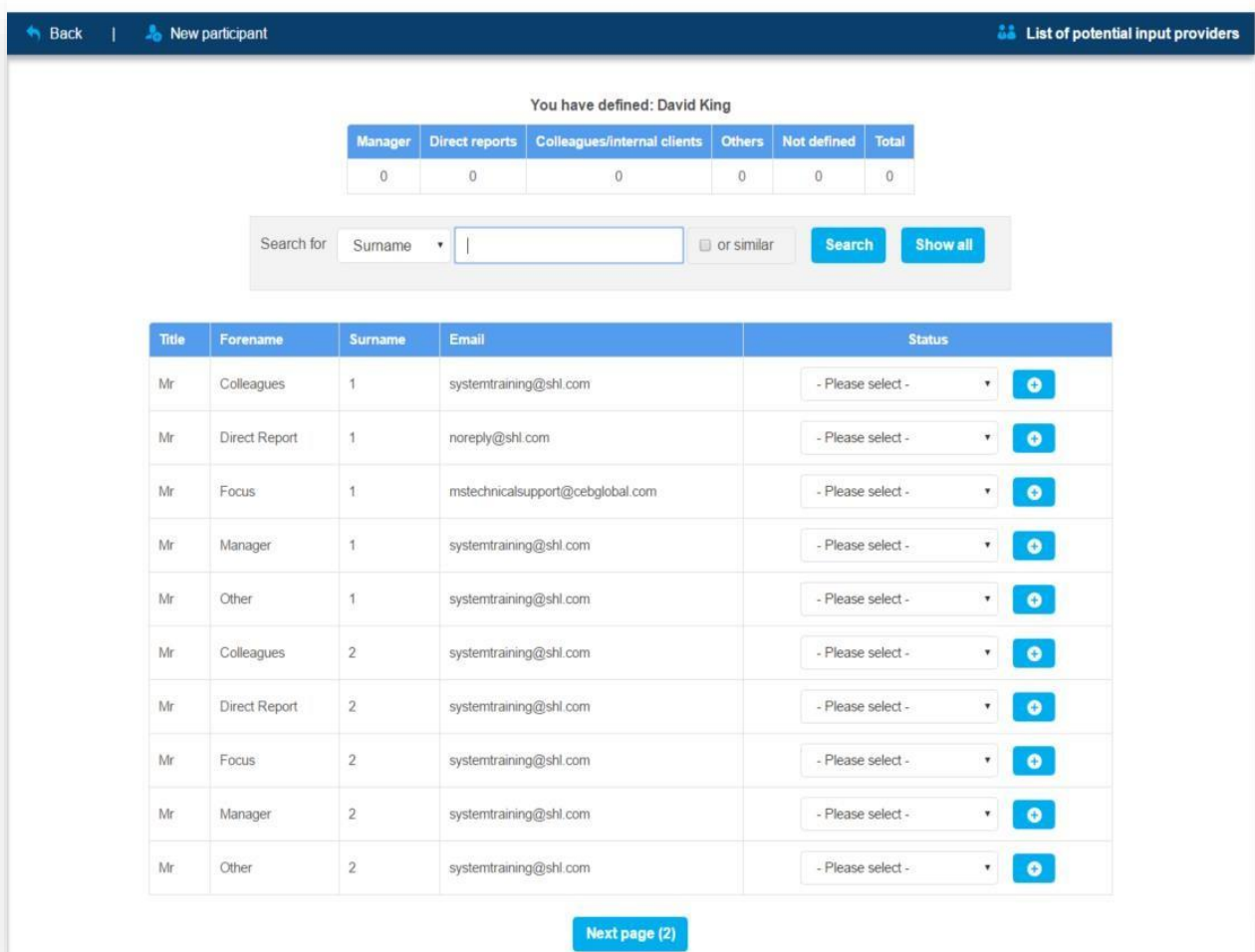
Please select action for ticked recordset:

The **List of raters** screen appears.

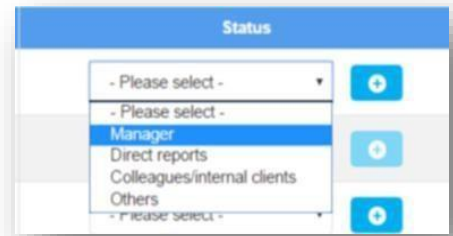
- On the menu options bar, click **Assign new rater**. The **List of potential input providers** screen appears, showing all the participants currently in the database.



The numbers of each type of rater are shown in the table at the top of the screen. In the following example, no raters have yet be defined.



5. From the drop-down list under **Status**, in the same row as the required rater, select the rater type. The count of that type of rater increases by one in the table at the top of the screen.



Tip – to find a partial match, use % in the search field

- To find participants whose name or email address contains certain words or characters, select Surname, First name or E-mail in the drop-down list, as required, and in the search field enter the text you wish to find surrounded by “%”.
For example “%@lt-industries%” finds “cliff.anderson@lt-industries.co.uk” and “helga.heinzel@lt-industries.de”.
- To find text that begins with certain characters, enter the required text in the search box followed by “%”.
For example “ard%” finds “Howard” and “Edward” but not “Richards”.
- To find text that ends with certain characters, enter the required text in the search box preceded by “%”.
For example “%Ander” finds “Anderssen” and “Anderson” but not “Flanders”.

6. Repeat until you have defined all the raters required. The table at the top of the screen will look something like this:

You have defined: David King

Manager	Direct reports	Colleagues/internal clients	Others	Not defined	Total
1	3	3	3	0	10

To delete raters from a list


You may need to delete raters if you have added them in error, or you wish to remove a rater from a list that was defined by a focus, perhaps because the focus created a duplicate in error.

1. On the **List of raters** screen, click the checkbox in the same row as the rater you want to delete.
2. From the dropdown list at the bottom of the list of raters select **Delete** and click **OK**. The **List of raters** screen appears and the rater is no longer on the list.

To instruct foci to define raters

When you have assigned the define raters task to foci you need to let the foci know that they have a task to complete. SHL 360 uses email, so it is important to ensure that the email addresses for participants are correct.

Before sending emails, check that the email recipient has confirmed that the address in SHL 360 is correct.

On the **Persons in database** screen, if the participant has confirmed that the email address is correct you will see a green tick  beside the participant's name.

If necessary, send a request to the participant to confirm their email address.

Although you may have edited email templates when setting up your project, it is advisable to check the content again, in case any of the details have changed, such as details of the person to contact or the dates by when the rater list needs to be completed.

1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.

The **Focus list** screen appears, showing all the foci who have been assigned to the project. Check that you have assigned the **define raters** task to the foci.

3. Click the numbers in the **Task status** column, in the same row as the name of each focus.
4. If you have assigned the **define raters** task, it will appear as a task on the list highlighted in orange. If necessary, assign the **define raters** task to the focus.
5. Click the checkboxes beside all the foci who need to define raters. To select all foci on the list, click the **All** checkbox in the heading row.



The number [2] refers to the email number in the list of email templates.



By default, the most recent project you worked on is shown.

6. From the drop-down list at the bottom of the screen select the action you want to perform, in this instance **Define raters – Start-up [2]** and click **OK**.

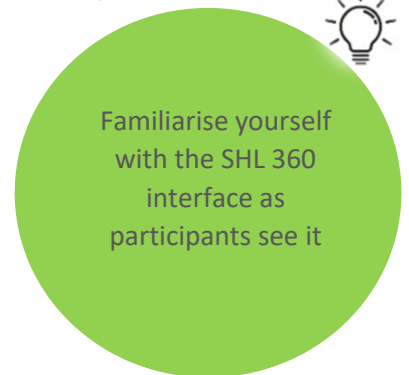
The screenshot shows the SHL 360 interface with a table of participants. An orange arrow points from the text above to the dropdown menu at the bottom of the table. The dropdown menu is open, showing the following options:

- Please select action for ticked recordset: [OK]
- Please select action for ticked recordset: - Close "define raters"
- Define raters - Start-up [2]**
- Define raters - First reminder [3]
- Rating - Start-up mail to focus [4] and all raters [5]
- Multi mail
- Delete
- Bulk Reports

Title	Name	E-mail	Focus start up	Focus reminder	Task status total/start/done/next	All	Edit	Mail	Report
Ms	Susan Day	sday@shl.com	03/14/2014		3 / 0 / 0 / 0				
Mr	David King	dking2@noreply.com	03/14/2014		1 / 0 / 0 / 0				

SHL 360 sends the requested emails containing a URL for SHL 360, a user name and password and, if you included the information, contact details in case of difficulties.

When the focus logs onto SHL 360, detailed instructions are displayed, giving step-by-step instructions for completing tasks.



Log onto SHL 360 using the participants' URL to see how participants are expected to complete tasks. In your browser, enter below link and use the user name and password assigned to one of your participants to access SHL 360.

URL: <https://www.feedback.mfs.shlsolutions.com/360/cand/fmain.asp>

Monitoring progress during rater list definition

Sometimes foci do not respond in a timely manner, so you may need to send a reminder email.

Check the **Focus list** screen regularly to see how the definition is progressing.

1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the Project drop-down list select the name of the project you wish to work on.

Focus start up	Focus reminder	Task status total/start/done/sent
05/28/2015	06/12/2015	(2 / 0 / 0 / 0)
07/02/2015		(8 / 0 / 0 / 0)
10/15/2014	04/27/2015	(7 / 0 / 0 / 0)
2/18/2014		(7 / 0 / 0 / 0)

The date in the **Focus start up** column shows the date the initial email was sent.

The date in the **Focus reminder** column shows the date a reminder was sent.


Notice the different colours in the **Task status** column:

Colour	Meaning
(7 / 0 / 0 / 0)	Task status in light blue Focus has not started the assigned tasks, or does not have any tasks assigned. Corresponds to the Definition Rater status NN , meaning "not started", on the Focus list screen (see below).
(2 / 0 / 0 / 0)	Task status in bright blue The task is in progress. Corresponds to the Definition Rater status processing on the Focus list screen.
(8 / 0 / 0 / 0)	Task status in teal The rater list has been defined. Corresponds to the Definition Rater status defined on the Focus list screen.
(7 / 0 / 0 / 0)	Task status in mid blue The rater list task has been completed and closed. Corresponds to the Definition Rater status closed on the Focus list screen.

To send a reminder for foci to define raters

If a focus has not responded to your request to define a rater list, you may need to send a reminder.

1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.



By default, the most recent project you worked on is shown.

The **Focus list** screen appears, showing all the foci who have been assigned to the project.

3. Click the checkboxes beside all the foci to whom you want to send a reminder. To select all foci on the list, click the **All** checkbox in the heading row.
4. From the drop-down list at the bottom of the screen select the action you want to perform, in this instance **Define raters – First reminder [3]** and click **OK**.

Closing rater lists

Before you can launch the project, the rater lists for all the foci must be closed and “locked”, to prevent further edits to the rater lists.

When foci have completed their rater lists, review and then close them. Closing the lists prevents foci from editing the lists once the project has been launched and emails have been sent to raters.

To review rater lists

1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.

The Focus list screen appears, showing all the foci who have been assigned to the project.

3. Click the numbers in the **Task status** column, in the same row as the name of the focus. The **List of raters** screen appears.
4. Review the list to ensure that the correct number and types of rater have been added, and that email addresses have been entered correctly.
5. If necessary, add or delete raters.

Tip – check for duplicates before closing rater lists

If foci have added participants to the database, it is possible that they may have added duplicates of existing participants. Before closing rater lists for a project, use the ...check for double feature.

To close rater lists

1. On the **Focus list** screen, tick the box in the same row as the name of the focus. Choose **Close** “define raters” from the drop down and click **OK**.

The screenshot shows the 'Focus List' screen in the SHL system. The page title is 'Project: Training project KG' and 'Questionnaire'. A search bar is at the top with 'Surname' entered. Below it is a table with columns: Title, Name, E-mail, Focus start up, Focus reminder, Task status (total/start/done/sent), All, Edit, Mail, and Report. Two rows are visible: Ms Susan Day (kaveri.glenham@shl.com) and Mr David King (dking2@noreply.com). An orange arrow points from the text above to the 'Close define raters' option in the dropdown menu that appears over the table. The dropdown menu also includes options like 'Define raters - Start-up [2]', 'Define raters - First reminder [3]', 'Rating - Start-up mail to focus [4] and all raters [5]', 'Multi mail', 'Delete', and 'Bulk Reports'. An 'OK' button is visible in the dropdown menu.

If you click **OK**, the **Focus list** screen appears and the colour of the **Tasks status** box changes to mid blue.

Always close the define rater list as it may inhibit the process (e.g. no tasks to complete)



Running your projects

Once the rater lists have been defined, the setup stage is complete and project is ready to launch.

Note: By default, the most recent project you worked on is shown.

Note: You can only send this email once.

Launching ratings

To launch the project, inform raters and foci of the tasks they need to complete.

As some time has elapsed since you set up email templates, it is advisable to check the content of emails to ensure that names, dates and other details are still relevant.

Check the content of email templates before launch

Multilingual

Check any local language email templates as well.

If you make changes to your email templates, ensure the same changes are made in all local language versions.

Although it is possible to send emails from several places in SHL 360, it is advisable to access all the foci and raters assigned to a project from the **Focus list** screen.

1. On the menu list, click **Focus list**. The Focus list screen appears.
2. On the menu options bar, from the Project drop-down list select the name of the project you wish to work on.

Focus List

The **Focus list** screen appears, showing all the foci who have been assigned to the project. Click the checkboxes beside the names of the foci whose ratings you want to launch. To select all foci on the list, click the **All** checkbox in the heading row.

From the dropdown list at the bottom of the list of foci select **Start-up mail to focus [4]** and all **raters [5]** and click **OK**.

Title	Name	E-mail	Focus start up	Focus reminder	Task status total/start/done/sent	All	Edit	Mail	Report
Mr	Steven Day	kaven.glenham@shl.com	07/02/2014	10/15/2014	4 / 1 / 0 / 0	<input checked="" type="checkbox"/>			
Mr	David King	kaven.glenham@shl.com	03/14/2014		11 / 0 / 0 / 0	<input checked="" type="checkbox"/>			

Dropdown menu options:

- Please select action for ticked recordset.
- Please select action for ticked recordset.
- Close 'define raters'
- Define raters - Start-up [2]
- Define raters - First reminder [3]
- Rating - Start-up mail to focus [4] and all raters [5]**
- Multi mail
- Delete
- Bulk Reports

To notify a single focus and the raters assigned to him or her

It is possible that you may need to add another focus after a project has been launched. In this instance you only need to inform the new focus and raters.

1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.

The **Focus list** screen appears, showing all the foci who have been assigned to the project.

3. Click the checkbox in the same row as the focus' name whose ratings you want to launch.
4. From the dropdown list at the bottom of the list of foci select **Rating - Start-up mail to raters and focus [4] & [5]** and click **OK**.

Monitoring progress after ratings are launched

It is important to monitor the progress of a project and remind raters of the tasks expected of them, to ensure that the project is completed as planned. You can monitor progress in several ways, each allowing you to see your projects from a different perspective. You can monitor progress on:

- An entire project
- An individual focus
- An individual rater, who may have tasks relating to several foci or projects

Project overview

To see how ratings are progressing for a single project, use the main menu.

1. On the menu list, click **Main menu**. The **Main menu** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.

Overview	10/03/2017 16:55	28/02/2017 16:13	Changes
Foci in database	2	3	1
Foci in process	1	3	2
Finished foci	1	0	1
Rater in database	3	5	2
Rater with uncompleted tasks	3	4	1
Rater with completed tasks	0	1	1
Ratings in database	3	7	4
Open ratings	3	6	3
Finished ratings	0	1	1

The following table explains what each row on the main menu shows:

Item	Description
Foci in database	Total number of focuses in the selected project
Foci in process	Number of focuses whose ratings are still incomplete
Finished foci	Number of focuses whose ratings are complete
Rater in database	Total number of raters (individual participants) in the selected project
Rater with uncompleted tasks	Number of raters who have tasks assigned to them that are not complete
Rater with completed tasks	Number of raters who have completed all tasks associated with the selected project <i>Note: Raters in this category may still have uncompleted tasks in other projects.</i>
Ratings in database	Total number of ratings for the selected project <i>Note: An individual rater may have several ratings tasks in a single project, for example a manager may have several direct reports to rate.</i>
Open ratings	Number of ratings not yet complete
Finished ratings	Number of completed ratings

To monitor the progress of an individual focus' ratings

1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.

The **Focus list** screen appears, showing all the foci that have been assigned to the project.

The **Task status** column shows the progress of tasks, including ratings, for each focus.

- The **first** number shows the total number of tasks associated with the focus.
- The **second** number shows the number of tasks that have been started but not completed.
- The **third** number shows the number of tasks that have been completed but not sent and locked.
- The **fourth** number shows the number of tasks that have been sent and locked.

Task status total/start/done/sent
(7 / 0 / 1 / 4)
(7 / 0 / 0 / 2)
(7 / 1 / 0 / 0)
(6 / 1 / 0 / 1)

As the project progresses, the first number stays the same but the other three numbers change as the statuses of the tasks change.

To view a focus' ratings in detail

1. Click the numbers in the **Task status** column, in the same row as the name of the focus. The **List of raters** screen appears.

Name: Kaveri Glenham

Title	Name	E-mail	Status / Task		Start	End	Rating start up	Rating reminder	All	View Edit	Mail
Ms	Kaveri Glenham	kaveri.glenham@shl.com	Self		07/12/2018	07/12/2018	07/12/2018		<input type="checkbox"/>		
Mr	John Williams	johwilliams@shl.com	Manager				07/12/2018	09/26/2018	<input type="checkbox"/>		
Mr	Colleagues 1	systemtraining@shl.com	Colleagues/internal clients						<input type="checkbox"/>		
Mr	Colleagues 2	systemtraining@shl.com	Colleagues/internal clients						<input type="checkbox"/>		
Ms	Tamara O'Reilly	Tamara.OReilly@shl.com	Direct reports		07/12/2018	07/12/2018	07/12/2018		<input type="checkbox"/>		
Mr	Adil Zaari	adil.zaari@shl.com	Direct reports		07/12/2018	07/12/2018	07/12/2018		<input type="checkbox"/>		
Mr	Ville Tirranen	ville.tirranen@shl.com	Direct reports		07/12/2018	07/12/2018	07/12/2018		<input type="checkbox"/>		
Ms	Catherine Franklin	cfranklin@shl.com	Others		07/12/2018		07/12/2018	08/15/2018	<input type="checkbox"/>		
Ms	Vickie Chatzistrati	Vickie.Chatzistrati@shl.com	Others		07/12/2018		07/12/2018		<input type="checkbox"/>		
Ms	Glenn Pedelino	glenn.pedelino@shl.com	Others		08/15/2018		07/12/2018	08/17/2018	<input type="checkbox"/>		

Please select action for ticked recordset:

Each task appears on a separate line with information relating to the task. For each task you can see:

- The name and email address of the focus
- The status of the rater relative to the focus
- The start and end dates of the project
- The dates when startup and reminder emails were sent

In the example above, the focus has selected the raters and also completed the questionnaire. Most of the raters have completed their tasks. There is one rater who has not started, so you may wish to send emails to this individual rater to remind them to complete the tasks assigned to her/him.

To monitor a rater's tasks



1. On the menu list, click **Persons in database**. The **Persons in database** screen appears.
2. Click the numbers in the **Ratings** column, in the same row as the name of the rater.

The **List of assessments** screen appears, but the screen is slightly different from the **List of assessments** screen accessed from the **Rater's list** screen.

You can now see the name of the project when hovering over **Project**, which the rating relates to. Once a rater has completed and submitted the questionnaire a padlock will show.

Title	Name	E-mail	Status / Task		Start	End	Rating start up	Rating reminder	All	View Edit	Mail
Ms	Kaveri Glenham	kaveri.glenham@shl.com	Self	🔒	07/12/2018	07/12/2018	07/12/2018		☐	👁️	✉️
Mr	John Williams	johwilliams@shl.com	Manager	📧			07/12/2018	09/26/2018	☐	✍️	✉️
Mr	Colleagues 1	systemtraining@shl.com	Colleagues/internal clients	📧					☐	✍️	✉️
Mr	Colleagues 2	systemtraining@shl.com	Colleagues/internal clients	📧					☐	✍️	✉️
Ms	Tamara O'Reilly	Tamara.O'Reilly@shl.com	Direct reports	🔒	07/12/2018	07/12/2018	07/12/2018		☐	👁️	✉️
Mr	Adi Zaari	adi.zaari@shl.com	Direct reports	🔒	07/12/2018	07/12/2018	07/12/2018		☐	👁️	✉️
Mr	Ville Tirranen	ville.tirranen@shl.com	Direct reports	🔒	07/12/2018	07/12/2018	07/12/2018		☐	👁️	✉️
Ms	Catherine Franklin	cfrankin@shl.com	Others	📧	07/12/2018		07/12/2018	08/15/2018	☐	✍️	✉️
Ms	Vickie Chatzistrati	Vickie.Chatzistrati@shl.com	Others	✅	07/12/2018		07/12/2018		☐	✍️	✉️
Ms	Glenn Pedelino	glenn.pedelino@shl.com	Others	✅	08/15/2018		07/12/2018	08/17/2018	☐	✍️	✉️

By using variables in email templates, each email sent is personalised with the recipients' details, thereby saving a lot of administrator time and efforts and ensuring consistency across a project.

Method	Target
From the Focus list screen	To send an email to focuses and raters assigned to a specific project
From the List of raters screen	To send an email to a single focus and the raters assigned to him or her
From the Rater's list screen	To send an email to individual raters regarding the focuses they are assigned to

*The email tool within SHL 360 is easy to use, allowing you to send emails to individuals or groups of participants from several places within the system

Tracking emails

You can see which emails have been sent to an individual from any screen that contains a **Mail** link (**Focus list**, **List of raters**, **Rater's list** and **List of assessments** screens).

To view emails sent to a participant

1. From a list of participants, click the **Mail icon** in the same row as the participant's name.

The following screen appears:

2. Click the participant's name beside **E-Mail list (blue menu bar)**. The **E-mail list** window appears, showing all the emails that have been sent to the selected participant, with the most recently sent email at the bottom of the list.

Sender name	Date of sending	Email type	Mail
System Training	07/02/2014 01:56	Rating - Start up Focus	Dear Steven Thank you for selecting your raters for the KG demo 07/02/2014. They have been notified about their task and have been instructed to complete the questionnaire before the 15/02/2014. If you have still not completed the questionnaire yourself, please do so now. Please set aside 25 minutes for this task. The process for completion is as follows: Please log on to the SHL Solutions website at: https://www.Feedback.mfs.shlsolutions.com/360/cand/main.asp?link=87f053b1DD39816f28f4 Enter your user name and password: Your ID: s.day02 Your Password: You will set your password at the first login The system will guide you through the process. Please make sure that you keep your ID and password in case you need to re-access the system.
System Training	15/10/2014 16:11	Rating - Reminder 3	Dear Steven In relation to the KG demo 07/02/2014 have been asked to provide feedback which will form part of a 360° process. Your feedback questionnaire has still not been completed. PLEASE COMPLETE YOUR FEEDBACK AS A MATTER OF URGENCY WITHIN THE NEXT 24 HOURS. The process for completion is as follows: Please log on to the SHL Solutions website at: https://www.Feedback.mfs.shlsolutions.com/360/cand/main.asp?link=87f053b1DD39816f28f4 Enter your user name and password: Your ID: s.day02 Your Password: You will set your password at the first login The system will guide you through the process. Please make sure that you keep your ID and password in case you need to re-access the system.

3. Scroll down to see details and content of all the emails sent to the participant.
4. When you have finished, click **Back** to return to the previous screen.

Available report types

There are **three** main types of report that can be generated in SHL 360.

Report type	Report purpose
Individual	Individual reports are intended as a basis for feedback sessions with individual focuses.
Project	The project summary report shows how all the focuses in a project were rated.
Group	The group summary report shows how all the focuses assigned to that group were rated.

Individual reports*

UCF Feedback Report

The *UCF Feedback Report* is a personalised summary of the responses received during the 360° feedback process, and displays the responses in a graphical format. Responses are shown by rater type, if two or more raters of any type (other than manager) have responded.

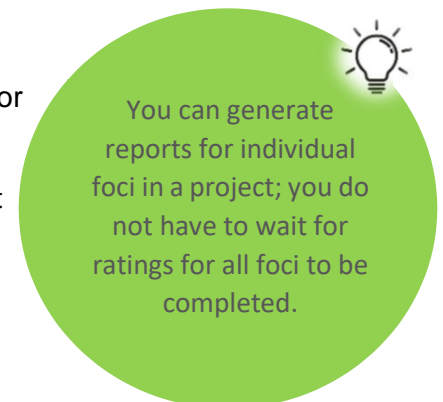
Project report

The content of a project report is based on the UCF competencies and additional questions and closely resembles the individual *UCF Feedback Report*.

If all the foci in a project are part of the same team, the project report may be useful for a manager or team leader to assess the performance of the team. If the foci are from a wider range of participants it may be useful for a more general overview of the performance of the foci in the project.

Group report

The group report is very similar to the project report in that it sums up ratings for several foci, but it has the added flexibility of allowing you to select group members from different projects. Depending on how you use the group report you can look at very small teams or the entire organisation.



* There is no additional charge for generating individual reports.

When to generate individual reports

When all the ratings within a project have been completed, or when the deadline has passed and sufficient ratings have been completed, you can create and deliver reports ready for the focus's feedback provider to deliver.

Although it is possible to generate a report before all the feedback is received, the report will not include all the results that were requested, so may have reduced value. In particular, if you generate a report that includes feedback from fewer than two of any rater type other than **Manager**, that rater type's feedback will not be included, to preserve rater anonymity.



Check that sufficient feedback has been received before generating a report.

Tip – if too few responses have been received, consider modifying the rater types

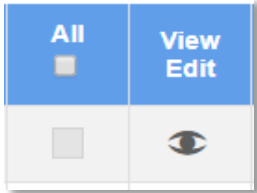
In order to ensure that the responses from every rater are included in the report, you may need to edit the rater type to one of the other types where there is at least one other rater. For example, if there are only four responses from raters for a particular focus, you may wish to change all of the rater types to **Colleagues** or **Other**, so that their responses are included in the report.

A single focus can belong to several groups.

By default, the most recent project you worked on is shown.

How to generate individual reports


1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.



Once the report has been generated, the rating will be locked. After the report has been generated, only functions available are sending e-mails and generate reports.

The **Focus list** screen appears, showing all the foci who have been assigned to the project.

3. Click **Report** in the same row as the focus you wish to generate a report on. The **Report tool** window appears.
4. **Choose** either Word or PDF format and click on **Generate report**.

Please **do not** generate the report unless the minimum amount of raters have completed and submitted their feedback/questionnaire. If you try to generate the report before, the focus lock () will come into place, meaning that you are unable to make changes to anyone who has completed their ratings. If participants need to be amended after the lock is in place, please reach out to your contact at SHL for assistance.

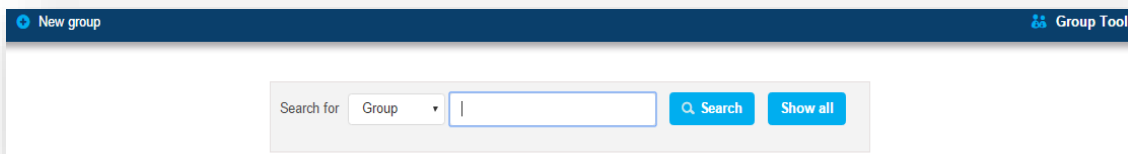
Title	Name	E-mail	Status / Task		Start	End	Rating start up	Rating reminder	All	View Edit	Mail
Ms	Kaveri Glenham	kaveri.glenham@shl.com	Self	🔒	07/12/2018	07/12/2018	07/12/2018		☐	👁️	✉️
Mr	John Williams	johwilliams@shl.com	Manager	🔒			07/12/2018	09/26/2018	☐	✍️	✉️
Mr	Colleagues 1	systemtraining@shl.com	Colleagues/Internal clients	🔒					☐	✍️	✉️
Mr	Colleagues 2	systemtraining@shl.com	Colleagues/Internal clients	🔒					☐	✍️	✉️
Ms	Tamara O'Reilly	Tamara.O'Reilly@shl.com	Direct reports	🔒	07/12/2018	07/12/2018	07/12/2018		☐	👁️	✉️
Mr	Adil Zaari	adil.zaari@shl.com	Direct reports	🔒	07/12/2018	07/12/2018	07/12/2018		☐	👁️	✉️
Mr	Ville Tirranen	ville.tirranen@shl.com	Direct reports	🔒	07/12/2018	07/12/2018	07/12/2018		☐	👁️	✉️
Ms	Catherine Franklin	cfranklin@shl.com	Others	🔒	07/12/2018		07/12/2018	08/15/2018	☐	✍️	✉️
Ms	Vickie Chatzistrati	Vickie.Chatzistrati@shl.com	Others	✅	07/12/2018		07/12/2018		☐	✍️	✉️
Ms	Glenn Pedelino	glenn.pedelino@shl.com	Others	✅	08/15/2018		07/12/2018	08/17/2018	☐	✍️	✉️

How to generate group reports

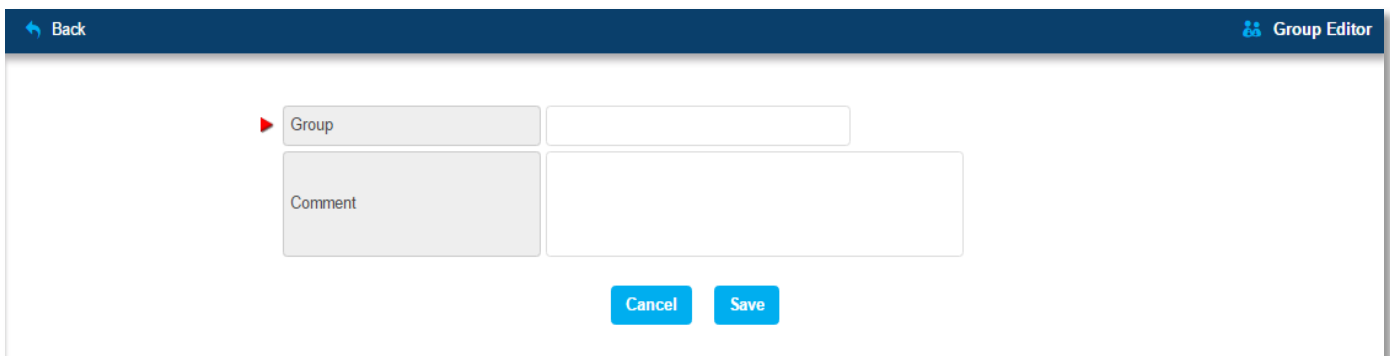
Generating a group report allows visibility, within a single document, of the behaviours of a group as a whole are perceived by all the people who rated the members of the group. A “group” can be a team, a department or employees in a specific geographical location.

You can also create several different groups and then compare the group reports, without having to compare individual reports for each member of the groups being compared. In order to generate a group report, you have to create a group and add people to it. The first time you use the **Group Tool**, the list is empty.

1. On the menu options bar, click **New group**.



2. The **Group Editor** window appears:



3. Enter a name for the new group and any comment you wish to add.
4. Click **Save** to save the group and return to the **Group Tool** window or click **Cancel** to return to the **Group Tool** window without saving.



Groups can only be created by account administrators, not project administrators. Once a group has been created, both project and account administrators can assign foci to it.

Adding foci to a group

1. On the menu list, click **Focus list**. The **Focus list** screen appears.
2. On the menu options bar, from the **Project** drop-down list select the name of the project you wish to work on.
3. The **Focus list** screen appears, showing all the foci that have been assigned to the project.
4. On the same row as the focus you wish to add to the group, click **Edit**. The **Assessments for** screen appears:

The screenshot shows a web interface titled "Assessments for" with a "Back" button. The form contains the following fields:

- Project: CSIT 360
- Name: Kaveri Glenham
- Definition Rater: closed
- Focus start up: 07/12/2018
- Focus reminder: (empty)
- Report Date: 09/11/2018
- Group: Assign to group(s)
- Comments: (empty)

5. Click **Assign to group(s)**. The **Assign to group(s)** screen appears:

Available groups are shown in the left-hand window, Groups that the focus is already assigned to appear in the right-hand window:

The screenshot shows the "Assign to group(s)" screen. It features two columns:

- Available group(s):** A list of groups including Senior Managers, JH Demo, example group, KG, Trial - CSIT, System Training Demo, test, and KG 2.
- Assigned Groups:** An empty list.

Navigation buttons include ">>" (right arrow), "<<" (left arrow), and a "Save" button at the bottom.







6. Click the name of the group you wish to assign the focus to in the left-hand window and click >>. The name of the group appears in the **Assigned Groups** window.
7. Click **OK** to save your selection and return to the **Assessments for** screen or click **Cancel** to return to the **Assessments for** window without saving.
8. The group that you just added appears in the **Group** field.

This close-up shows the "Group" field with the text "Trial - CSIT Assign to group(s)" selected.

Generating a group report

1. On the menu list, click **Groups**. The **Group Tool** window appears.
2. Click the **report icon** in the same row as the group you wish to generate a group report for. Filter using the **Search** area at the top of the screen if necessary.

The screenshot shows the 'Group Tool' interface. At the top, there is a search bar with a dropdown menu set to 'Group' and a search button. Below the search bar is a table with the following data:

Group	Comment	Report
example group		
JJH Demo	Example group	
Senior Managers		
System Training Demo		
test		
Trial - CSIT	Group report	

An orange arrow points to the report icon in the 'Report' column of the 'example group' row. At the bottom of the table, there is a dropdown menu with the text 'Please select action for ticked record set:' and an 'OK' button.

3. The **Report Tool** screen appears:

The screenshot shows the 'Report tool' interface. At the top, there is a 'Back' button and a 'Report tool' header. Below the header, there is a section titled 'The report is based on the following evaluations:' with the following table:

Manager	Direct reports	Colleagues/internal clients	Others	Total
1	2	2	0	5

Below the table is a 'Summary report' section with the following fields:

- Group: Trial - CSIT
- Language: English
- Report Format: PDF

At the bottom of the summary report section is a 'Generate report' button.

4. Click **Generate report**. After a few moments a PDF document will download.

How to generate project reports

1. On the menu list, click **Project**. The **Project tool** screen appears:

The screenshot shows the 'Project tool' interface. At the top, there is a search bar with a dropdown menu set to 'Project name' and a search button. Below the search bar is a table with the following data:

Project name	Owner	Status	Start date	Report
Vanessa January 2016	Shirley King	Active		
WideDemo KG	System Training	Active		
XDemo October	Shirley King	Active		
Z demo KG	System Training	Active		

Below the table, there is a 'Please select action for ticked record set:' dropdown menu and an 'OK' button. At the bottom, there is a 'Previous page (14)' button.

2. On the same row as the project you wish to generate a report for, click **Report**. The following screen appears:

The screenshot shows the 'Report tool' interface. At the top, there is a 'Back' button and a 'Report tool' label. The main content area displays the following information:

The report is based on the following evaluations:

Manager	Direct reports	Colleagues/internal clients	Others	Total
1	2	3	3	9

Below the table, there is a 'Summary report' section with the following options:

- Project: Trial - CSIT
- Language: English
- Report Format: PDF

At the bottom, there is a 'Generate report' button.

3. Click Generate report. After a few moments a PDF document will download.

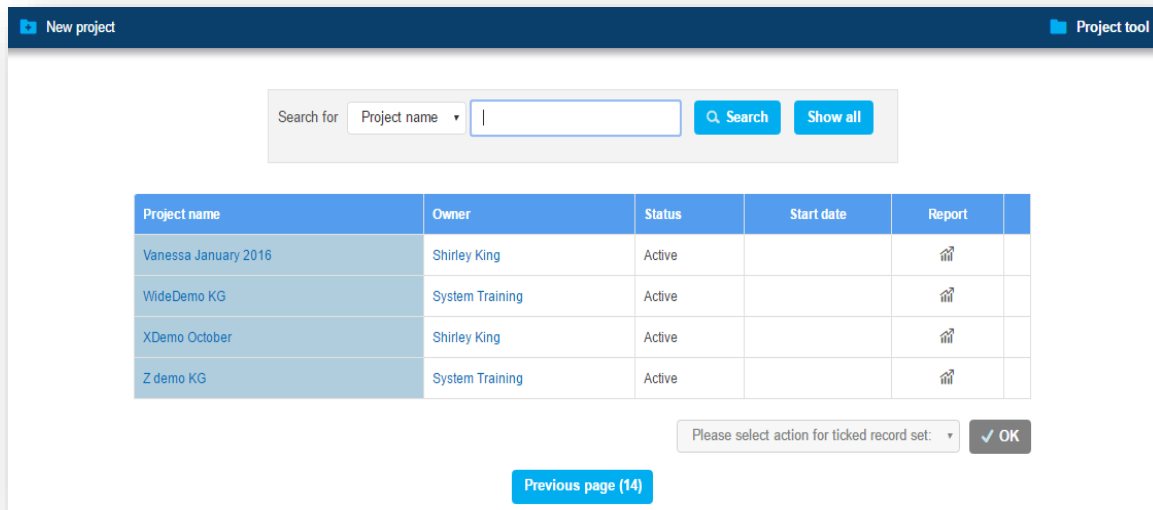


Projects can only be closed by account administrators, not project administrators.

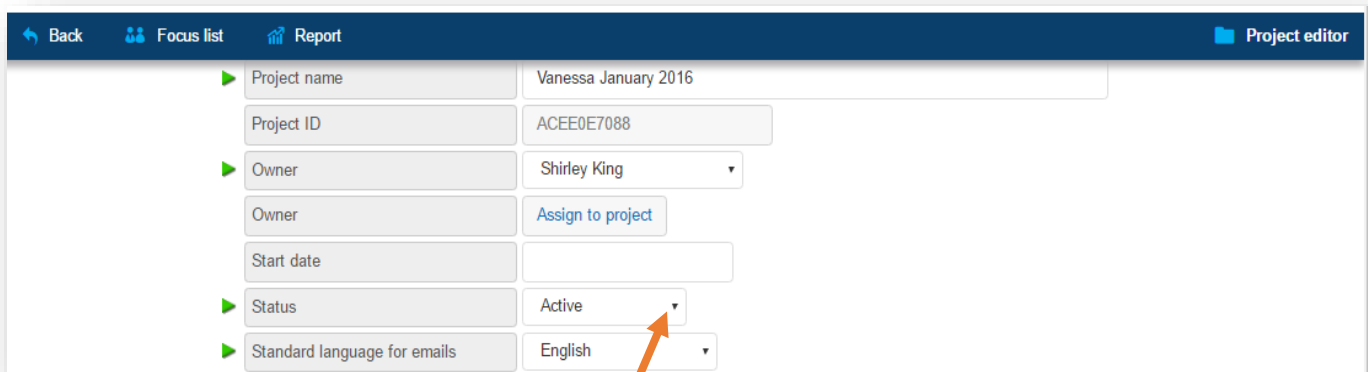
Closing a project

When all the required reports have been generated and delivered, close the project by setting its status to **Not active**. This means that when any of the participants involved in the project log into SHL 360, perhaps to take part in new projects, the tasks associated with the closed project will no longer appear on the participants' task lists.

1. On the menu list, click **Projects**. The Project tool screen appears:



2. Click on the **project name** you wish to close. The **Project editor** screen appears:



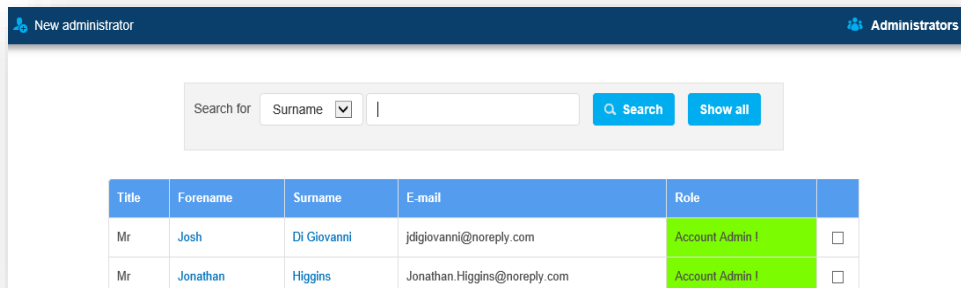
3. In the **Status** drop-down list, select **Not active**.
4. Scroll to the bottom of the screen and click **Save**. The **Project tool** screen appears, and the status of the project is now shown as **Not active**.

Adding and editing administrators

To ensure your project can run smoothly from the beginning it is advisable to add your administrators at the beginning of the project, although you can add new administrators, or edit existing administrators, at any time.

How to add a new administrator

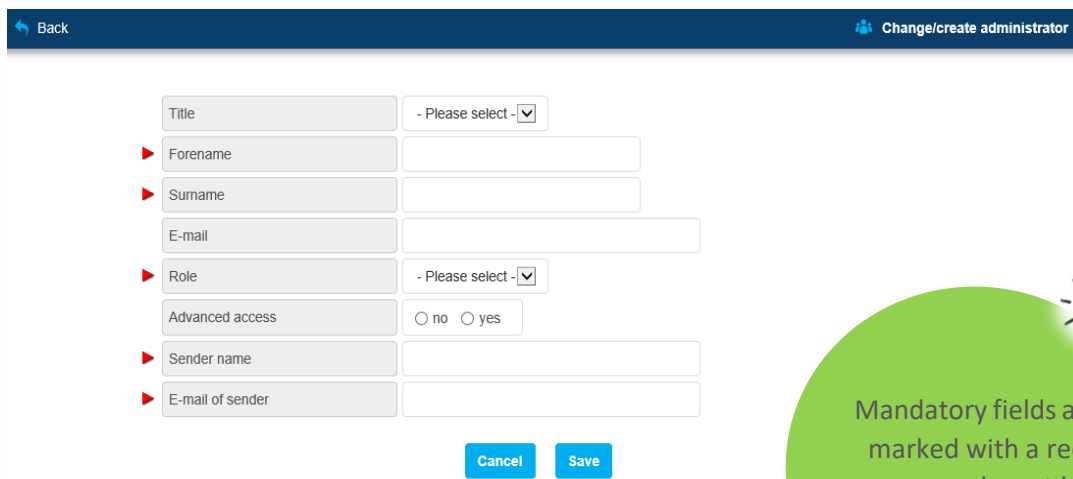
1. On the menu list, click **Administrators**.



The screenshot shows the 'New administrator' interface. At the top, there is a search bar with a dropdown menu set to 'Surname' and a search button. Below the search bar is a table with the following data:

Title	Forename	Surname	E-mail	Role	
Mr	Josh	Di Giovanni	jdigiovanni@noreply.com	Account Admin 1	<input type="checkbox"/>
Mr	Jonathan	Higgins	Jonathan.Higgins@noreply.com	Account Admin 1	<input type="checkbox"/>

2. On the menu options bar, click **New administrator**. The **Change/create administrator** screen appears.
3. Enter the information for the new administrator.



The screenshot shows the 'Change/create administrator' form. The form has a 'Back' button and a 'Change/create administrator' button. The form fields are:

- Title: - Please select - (dropdown)
- Forename: (text input, marked with a red arrow)
- Surname: (text input, marked with a red arrow)
- E-mail: (text input)
- Role: - Please select - (dropdown, marked with a red arrow)
- Advanced access: no yes
- Sender name: (text input, marked with a red arrow)
- E-mail of sender: (text input, marked with a red arrow)

At the bottom of the form are 'Cancel' and 'Save' buttons.

Mandatory fields are marked with a red arrow and must be completed.

- From the **Role** drop-down list, select the type of administrator required. Choose between **Account Admin, Project Admin or Project User**.

A project administrator cannot add new account administrators, so it is possible that you will not see all three options in the drop-down list.

- If you want to allow the new administrator to create further administrators of the same level, in the **advanced access** section select **yes** (The default setting is yes).
- In the **Sender name** field, enter the name you wish to appear on emails sent by the new administrator. The name does not have to be the administrator's own name; you can choose to use the name of another administrator or a generic name such as "HR Department".
- In the **E-mail of sender** field, enter the email address that you want emails to be sent from.

The completed screen will look like this:

- When all the fields are completed, click **OK**.
- Repeat steps 2 – 4 until the details of all the administrators for your project are registered in the account.

Tip – add a generic sender name and sender email address for administrators

Add a generic sender name and sender email address to appear on any emails sent by the new administrator. This feature allows you to set up your project so that all emails appear as if they are sent from a single email account. In this way, any participants' replies are sent to a central email address that can be accessed by all project administrators.

Sending login details to administrators

1. On the menu list, click **Administrators**. The **Administrators** screen appears.
2. Click on the name of the **Administrator**.

The screenshot shows the 'New administrator' interface. At the top, there is a search bar with a dropdown menu set to 'Surname', a search button, and a 'Show all' button. Below the search bar is a table with the following data:

Title	Forename	Surname	E-mail	Role	
Mr	Josh	Di Giovanni	jdigiovanni@noreply.com	Account Admin I	<input type="checkbox"/>
Mr	Jonathan	Higgins	Jonathan.Higgins@noreply.com	Account Admin I	<input type="checkbox"/>

3. Click on **Email Registration details**.

The screenshot shows the 'Email Registration details' form. The form fields are as follows:

- Title: Ms
- Forename: Kay
- Surname: G
- E-mail: systemtraining@shl.com
- User name: k.g01
- Role: Project Admin
- Advanced access: no yes
- Date: mm/dd/yyyy
- Sender name: Systemtraining
- E-mail of sender: systemtraining@shl.com

At the bottom of the form, there are 'Cancel' and 'Save' buttons.

Tip – click Administrators on the menu list to view all administrators in the account

Use the different colours in the Role column to quickly identify the permission levels for each administrator.

- Tailor the text of the e-mail and **tick** the box if you wish to receive a copy and click **Send**.

Back Email Registration details

Sender Name	Kaveri Glenham
Sender Email	kaveri.glenham@noreply.com
Send copy of mail to your account?	<input type="checkbox"/>
Recipient Name	Test Project Admin
Recipient Email	test@cebglobal.com
Subject	Your Account Details

Message

Dear Test

Your Administrator account has been created.

Please log on to the SHL Solutions website at: <https://mfs-uat.shlsolutions.net/feedback-uat/360/client/fmain.asp?link=98F9FC2A255A3B7625A8>
 Enter your user name and password:
 Your ID: t.projectadmin01
 Your Password: Please use your existing password

Should you require help, please do not hesitate to contact us by e-mail: (*Please replace with CONTACT EMAIL ADDRESS and remove brackets and stars*) or phone: (*Please replace with PHONE NUMBER and remove brackets and stars*)

The process is supported by CEB's SHL Talent Measurement Solutions, a specialised assessment and development consultancy.

Thank you very much for your participation.
 SHL (*Please replace with COMPANY NAME or NAME OF PERSON TO CONTACT and remove brackets and stars*)

Cancel Send

To edit an existing administrator

- On the menu list, click **Administrators**. The **Administrators** screen appears.
- Click the user name of the administrator whose details you wish to edit. The Change/create administrator screen appears.
- Edit the administrator's details as required. When you are finished click OK, or click Cancel to exit the **change/create administrator** screen without saving your changes.

Tip – don't delete administrators if they have been involved in projects

Although it is possible to delete an administrator, it is not advisable to do so if the administrator has already taken part in a project, to keep information about previous projects intact. A better solution is to remove administrator permissions. Instead, change the password for that particular administrator account to remove administrator permissions.





If you **do** wish to delete an administrator, on the **Administrators** screen click the checkbox to the right of the person's role, from the dropdown list at the bottom of the list of administrators select **Delete** and click **OK**. The administrator is deleted from the account.

Icons and colours





To help you to identify the status of tasks during the lifetime of a project, the system displays various icons and uses colours for below options.

- 1) When looking at Focus list screen.
- 2) When looking at tasks or participant status.
- 3) When looking at List of raters screen.
- 4) When looking at Persons in database screen or Raters list screen.




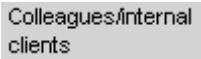
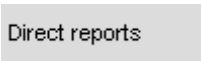
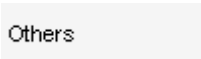
1. When looking at Focus list screen

Colour	Meaning
	Task status in light blue Focus has not started the assigned tasks, or does not have any tasks assigned. Corresponds to the Definition Rater status NN , meaning "not started", on the Focus list screen (see below).
	Task status in bright blue The task is in progress. Corresponds to the Definition Rater status processing on the Focus list screen.
	Task status in teal The rater list has been defined. Corresponds to the Definition Rater status defined on the Focus list screen.
	Task status in mid blue The rater list task has been completed and closed. Corresponds to the Definition Rater status closed on the Focus list screen.

2. When looking at tasks or participant status

Symbol	Meaning
	A new record or task that has not been edited
	A record or task that has been edited but is not complete
	A record or task that has been completed but is not locked
	A record or task that has been completed and locked

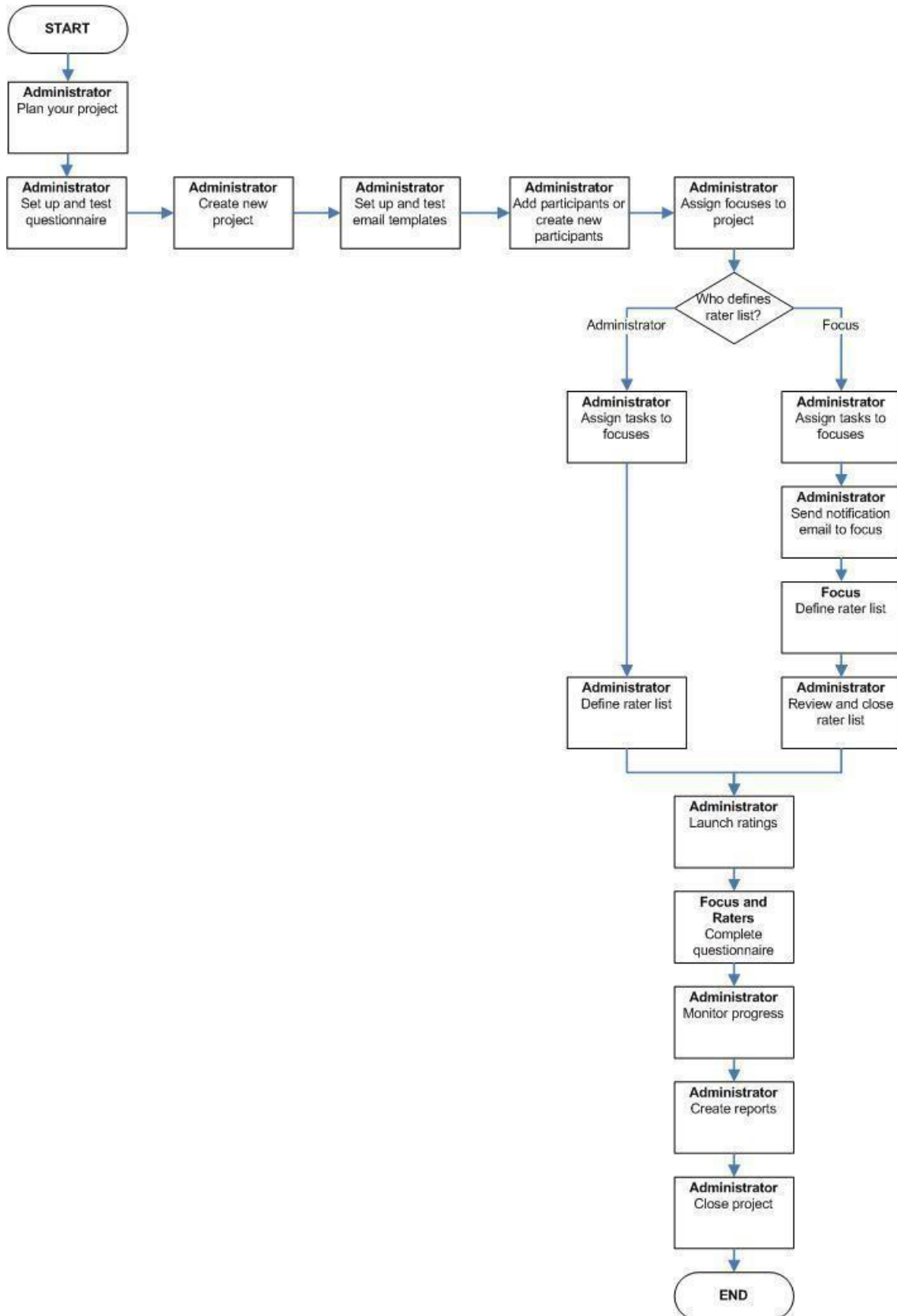
3. When looking at List of raters screen

Colour	Meaning
 define raters	Task on orange background A focus has been assigned the task to define raters
 Self	Task on dark blue background A focus has been assigned the task to complete the competency questionnaire
 Manager	Status on dark grey background A rater is defined as the focus's manager
 Colleagues/internal clients  Direct reports	Status on mid grey background A rater is defined as the focus's colleague or direct report
 Others	Status on dark grey background A rater is defined as Other

4. When looking at Persons in database screen or Raters list screen

Colour	Meaning
Alex Sunshine	Participant's name in light blue Participant is in the database but has not been assigned as a focus for any project.
Alice Human	Participant's name in dark blue Participant is in the database and has been assigned as a focus for a project.
0/0/0/0	Task status in light blue Participant does not have any tasks outstanding
1/0/0/0	Task status in orange Participant has tasks outstanding

This diagram shows a process flow that can be used for projects of any size or complexity.



Troubleshooting

This section lists some of the more common queries you may have when working with SHL 360. It also answers some of the queries that participants may ask.

Administrator queries

There are duplicate records in the SHL 360 database for some participants

This can happen if several people are responsible for adding participants, for example in a large organisation with several administrators or if foci define their own rater lists.

- Before launching a project and sending emails, check the database for duplicates

Accented characters do not display correctly when editing emails

This can occur if your browser encoding does not allow for accented characters.

- Modify your browser encoding to ensure that it is set to UTF-8 before editing emails. To do this, right-click in a browser window, select **encoding** and then select **Unicode (UTF-8)**.

Administrators cannot delete a participant record from the database

While a participant has an active task, the participant record cannot be deleted. This protects the integrity of the project that the participant is involved in.

- Check the **Focus list** screen and **Rater's list** screen and remove the participant as a focus or a rater.

Participant queries

Foci cannot complete the rater list as they don't have the required number of people in all the rater types

This can be the case if your project includes some foci who have direct reports and some who do not, and the process flow requires foci to define rater lists.

- When preparing email templates, edit the template for **Define rater – Start up** to include a specific instruction to foci to submit their rater list when all the other rater types have been defined, if they do not have direct reports.
- Alternatively, create a separate email template to instruct foci to submit their rater list when all the other rater types have been defined.

Raters cannot complete tasks as no tasks are shown when they log in

This is a common error and is caused if the focus task to define rater lists has not been closed.

- Ensure that rater lists are closed

Foci cannot add any more raters to their rater lists

There is a maximum number of raters allowed for each focus. The default in SHL 360 is 15, though the limit set on your account may be lower or higher.

There are two possible solutions:

- Request the focus not to exceed the maximum number of raters when defining the rater list. This is likely to be the appropriate solution in most instances, as a 360° review process that includes a large number of raters takes a lot more time and effort to run than one that includes a smaller number of raters.
- Request your SHL account administrator to increase the maximum number of raters allowed. This may be the appropriate solution where a larger number of raters is genuinely required, for example if a manager has a large team of direct reports or where a focus has a lot of contact outside his or her direct team and so requires a lot of raters of type **Other**.

This document is designed to help you quickly administer assessments in The SHL 360 platform. For more detailed information and support please visit: <https://support.shl.com>



About SHL

SHL is a best practice insight and technology company. In partnership with leading organizations around the globe, we develop innovative solutions to drive corporate performance. SHL equips leaders at more than 10,000 companies with the intelligence to effectively manage talent, customers, and operations. SHL is a trusted partner to nearly 90% of the Fortune 500 and FTSE 100, and more than 70% of the Dow Jones Asian Titans. More at SHL.com.