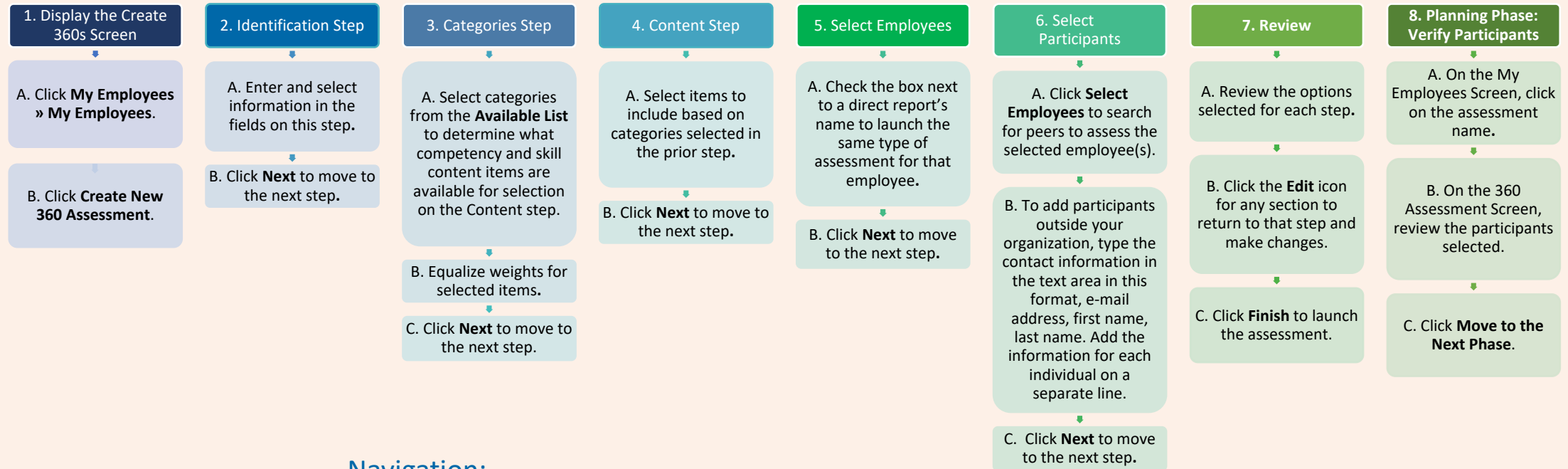


Launch 360 Assessments as a Manager

Managers follow these steps to launch a 360 assessment for a direct report. The steps you see depend on the workflow template selected. 360 assessments allow peers and outside individuals, such as vendors, to evaluate employee performance.



Navigation:

- Use the **Page Down** key to proceed through the quick steps.
- Use the **Page Up** key to return to a prior slide.

Deltek Talent Management

Deltek, Inc.English17733Dylan McKenzie

Dashboard

MY EMPLOYEES

My Employees

My Matrix Employees

9 Box

Project Teams

Certifications

Approvals

Profile Edits

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

COMPENSATION

CAREER CENTER

REPORTS

EmployeesSearch...

Main Dashboard

Get More WidgetsTasks

New Tuition Assistance Requests (3)

Score this Appraisal - Appraisal (Project Appraisal) Justin Zinn

Show All

Candidates by Status

Applied38.98 %

Other16.95 %

Hired8.47 %

Declined8.47 %

Requisitions by Status

Rejected1

Internal1

Pending Approval2

Filled10

Posted Int/Ext13

A

Expand the MY EMPLOYEES menu and click **My Employees**.

1. Display the Create 360s Screen > Step A



Employees

Search...



My Employees / My Employees / Appraisals

My Employees

Performance

You must be on the **Performance** tab to launch a 360 assessment. If you don't see Performance under My Employees, click on the **Performance** tab to toggle back to Performance.

Development

Learning

<< < 1 > >>

Displaying 1 - 8 of 8 10 25 50 100 per page



Chris Clark
Director of Staff Operations

PB: 3
Administration
Headquarters

APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE



★ 2021 Company Appraisal

Planning

Incomplete

360 Degree Feedback (360)

Assessment

Incomplete

ACTIONS

Continuous Feedback

Goals

+ Create New Appraisal

+ Create New 360 Assessment

Drill Down

Set Performance/Potential Rating

B

Expand the Action menu and click **Create new 360 Assessment**.

Expand

APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE



Appraisal

Performance

Incomplete

10/31/2021

1. Display the Create 360s Screen > Step B



Employees Search...



Create New 360 Assessment



You are creating a 360 appraisal for your employee that will allow an ad-hoc group of people to assess the employee. These can be peers, leaders, subordinates, or even people who are not employees within your organization.

Choose a source for the 360 assessment using one of the three options:

1. Let the system determine the best content to use based on the employee's information.
2. You can select a specific template to use.
3. You can start an assessment from scratch where you choose the competencies and skills that you want included in the assessment.

360 SOURCE

☐ Best Fit Workflow

☒ Choose Workflow

-- Select --

☐ Start from Scratch

C

Select a source for the assessment and click **Submit**.

Submit

Close Window

Chris Clark
Director of Staff Operations

PB: 3
Administration
Headquarters

APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE

Appraisal

Performance

Incomplete

10/31/2021

1. Display the Create 360s Screen > Step C



Employees

Search...



My Employees / My Employees

Create 360s

Step 1

Identification

Step 2

Categories

Step 3

Content

Step 6

Review

NAME *

360 Assessment

SCALE *

Company Default

☒ Allow Employees to Nominate Participants

< Previous

> Next

Cancel

A

Accept the defaults from the workflow or enter information in the fields:

- **Name:** Enter a descriptive name that will display to an employee and to any participants when the 360 assessment is created. 360s can be submitted to participants outside of the organization, so you may want to avoid company-specific terminology.
- **Scale:** Select the scale to use to assess the employee.
- **Allow Employees to Nominate Participants:** Select this option to enable employees to suggest other participants for the 360 assessment. The manager will make the final determination on which nominated participants are included.

B

Click **Next** to move to the next step.

v16.4.0-rc.3

Last sync: 2021-02-24 17:40:02



Employees Search...



My Employees / My Employees

Create 360s

Step 1
IdentificationStep 2
CategoriesStep 3
ContentStep 4
Select EmployeesStep 5
Select 360 ParticipantsStep 6
Review

Available Items

Job Competencies (Competency)



Old Competencies (Competency)



Skills (Skill)



Selected Items

Core Competencies (Competency)

Weight 50.0

Project Competencies (Competency)

Weight 50.0

100.0

Equalize Weights

Normalize Weights to 100

< Previous

> Next

Cancel

B

- **Equalize Weights:** Click to evenly distribute the weight amongst all categories for a total of 100.
- **Normalize Weights to 100:** Enter values in the **Weight** fields and click this button to adjust each item's weight to maintain the ratio among the weights, but have the total equal 100.

A

Click a plus icon to move a category to the **Selected Items** column.

C

Click **Next** to move to the next step.

Project Competencies

Available Items	
Communications ⓘ	+
Decision Making ⓘ	+
Execution ⓘ	+
Leadership ⓘ	+
Strategy Development ⓘ	+
Team Management ⓘ	+
Technical Competence ⓘ	+

A

Click a plus icon to move a content item to the **Selected Items** column.



Selected Items	
Business Acumen ⓘ	Weight 50.00 % ✕
Critical Thinking ⓘ	Weight 50.00 % ✕
Total Weight 100.00	

B

Enter weights in the **Weight** fields to add to 100.

< Previous

> Next

Cancel

C

Click **Next** to move to the next step.

Employees

Search...

My Employees / My Employees

Create 360s

Step 1
Identification

Step 2
Categories

Step 3
Content

Step 4
Select Employees

Step 5
Select 360 Participants

Step 6
Review

<< < 1 > >>

Displaying 1 - 5 of 510 25 50 100 per page

<input type="checkbox"/>	EMPLOYEE NAME	EMPLOYEE ID	MANAGER	ORGANIZATIONAL UNIT	JOB TITLE	LOCATION
<input checked="" type="checkbox"/>	Chris Clark			Administration	Director of Staff Operations (10004)	Headquarters
<input type="checkbox"/>	Chad Harter			Finance	Director of Finance (10003)	Headquarters
<input type="checkbox"/>	Daiki Mori			Human Resources	Director of Human Resources (18294)	Headquarters
<input type="checkbox"/>	Katie Peterson			Safety	Director of Training and Safety (15432)	Headquarters
<input type="checkbox"/>	Pattie Taylor	10011	Dylan McKenzie	Employee Relations	Director of Employee Relations (15101)	Headquarters

A

This table lists all your direct reports. The employee who was initially selected for the 360 assessment is selected here by default. Check the box next to other direct reports to launch the same type of assessment for these employees. Check the box next to **Employee Name** to select all direct reports.

B

Click **Next** to move to the next step.

5. Select Employees Step > Step A and B

< Previous

> Next

Create 360s

Step 1
Identification

Step 2
Categories

Step 3
Content

Step 4
Select Employees

Step 5
Select 360 Participants

Step 6
Review

Choose the employees who should be included in rating the employee as part of this 360 assessment. *NOTE: You can add participants to this list later up to the point of when you finalize the planning phase of the 360 assessment.*

EMPLOYEES

Select Employees

Sean Abrams
Shawn Aaron

A Click **Select Employees** to open the Select Employees dialog box where you choose the employees you want to participate in the assessment process. Selected employee names display beneath the button.

To add external participants to the 360 assessment, simply type the contact information in the text area in this format: **e-mail address, first name, last name**. Add the information for each rater on a separate line.
For example:
jdoe@company.com, Jane, Doe
bsmith@company.com, Bob, Smith

FOR EXTERNAL RATERS

jdoe@company.com, Jane, Doe
bsmith@company.com, Bob, Smith

B Type the contact information for participants outside your organization in the text area in this format: **e-mail address, first name, last name**. Add the information for each participant on a separate line.

C Click **Next** to move to the next step.

BUSINESS ACUMEN

50.00%

CRITICAL THINKING

50.00%

A

Review your selections. Click the **Edit** icon to return to that step and make changes, if needed.

Select Employees

 Edit

Employee

1. Chris Clark (10007)

Select 360 Participants

 Edit

Participants

1. Sean Abrams

2. Shawn Aaron

EXTERNAL RATERS

Jane Doe (jdoe@company.com)

Bob Smith (bsmith@company.com)

B

Click **Finish** to launch the assessment.

 Previous

 Finish

7. Review Step > Step A and B



My Employees

Employees

Search...



My Employees / My Employees

My Employees

Performance

You are returned to the My Employees Screen, where the assessment displays for the employee under Appraisals.

Development

Learning

<< < 1 > >>

Displaying 1 - 8 of 8 10 25 50 100 per page



Chris Clark
Director of Staff Operations

PB: 3
Administration
Headquarters

APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE



★ 2021 Company Appraisal

Planning

Incomplete

02/15/2021

360 Degree Feedback (360)

Assessment

Incomplete

N/A

360 Assessment (360)

Planning

Incomplete

N/A

A

Click the name of the assessment to open the 360 Assessment to the Planning Phase where you verify the selected participants.

Expand

APPRAISALS

CURRENT PHASE

SCORE

PHASE END DATE



Appraisal

Performance

Incomplete

10/31/2021

360 Assessment

for Chris Clark

Print

This appraisal is ready to move to the next phase.

Move to the Next Phase

B Verify participants and click **Move to the Next Phase** when finished.






Participants can be added by administrators, managers, and employees, if the **Allow Employees to Nominate Participants** option was selected on the Identification Step. Verify participants before moving to the next phase.

360 INFORMATION SUMMARY

Step 1
Planning

Step 2
Assessment

Step 3
Review

Participants			
PARTICIPANT NAME	STATUS	ASSESSMENT SUBMITTED ON	ACTIONS
Sean Abrams	Not Contacted Yet		
Shawn Aaron	Not Contacted Yet		
Jane Doe	Not Contacted Yet		
Bob Smith	Not Contacted Yet		

Add or remove participants on this screen, from the Actions menu.

Employees

Search...



My Employees / My Employees

360 Assessment

for Chris Clark

Print

Notifications will be sent out to all participants to follow through with the scoring.

The appraisal is not ready to move to the next phase.

- 360 scoring is not yet complete.

Next Appraisal Action

The appraisal is not currently waiting on your action.

360 INFORMATIONSUMMARY

Step 1
Planning

Step 3
Review

This concludes the Launch 360 Assessments as a Manager quick steps.

Participants			
PARTICIPANT NAME	STATUS	ASSESSMENT SUBMITTED ON	
Sean Abrams	Not Contacted Yet		✕
Shawn Aaron	Not Contacted Yet		✕
Jane Doe	Not Contacted Yet		✕