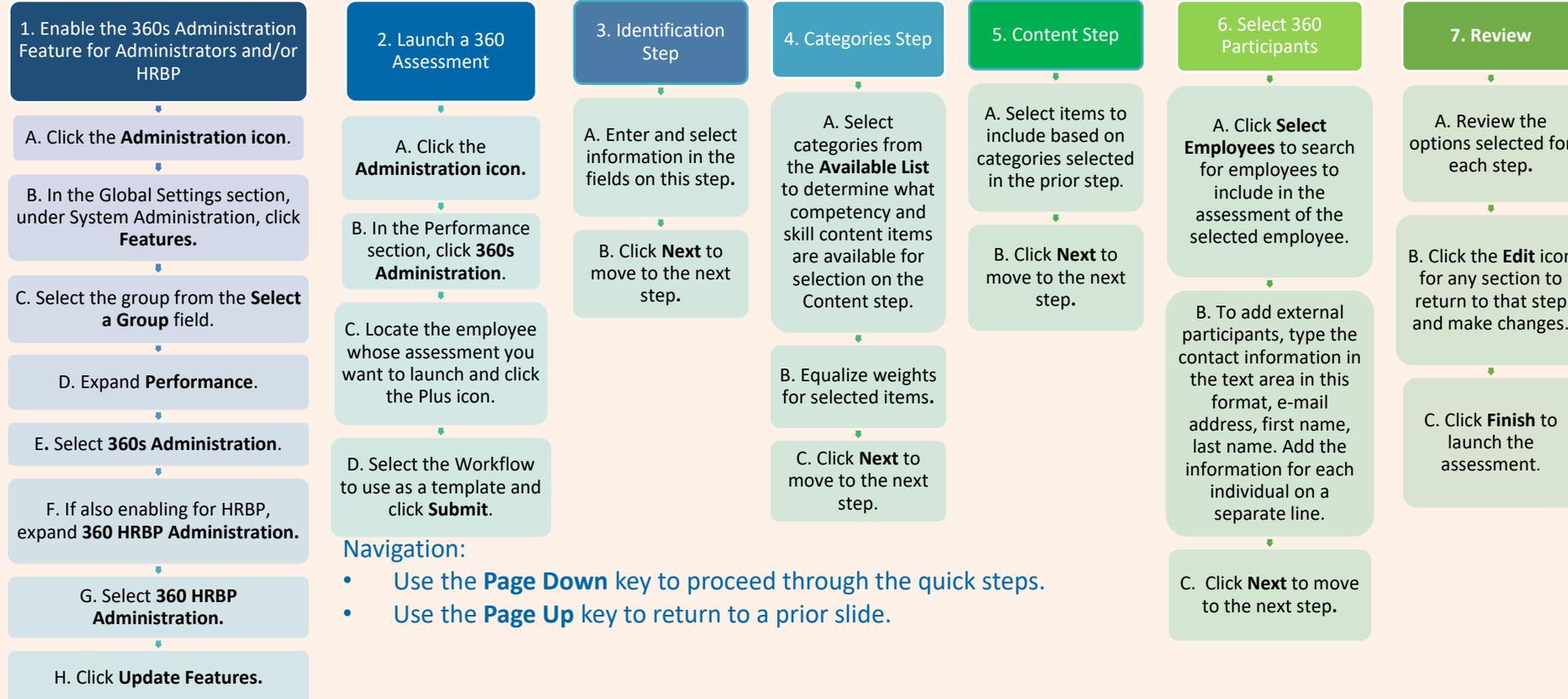


# Launch a 360 Appraisal as an Administrator or HRBP

Administrators and Human Resources Business Partners can launch 360s one at a time and in bulk on the 360s Administration Screen. These steps take you through launching an individual assessment. HRBP users see only those employees to which they are associated. The steps you see when launching an assessment depend on the source selected during launch.



- Dashboard
- MY EMPLOYEES
- RECRUITING
- PERFORMANCE
- LEARNING
- SUCCESSION
- COMPENSATION
- CAREER CENTER
- REPORTS
- CUSTOM MENU

Employees Search...

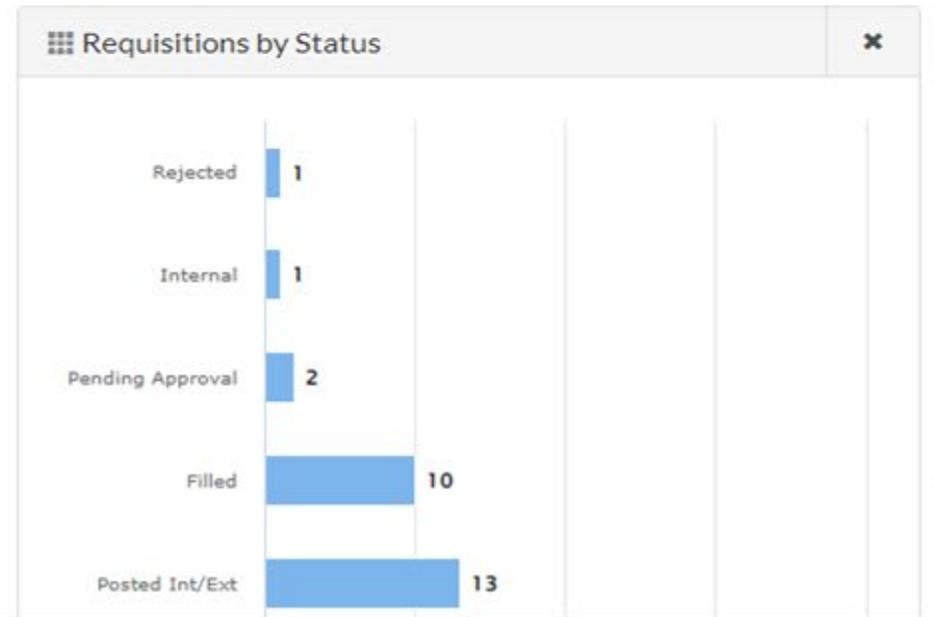
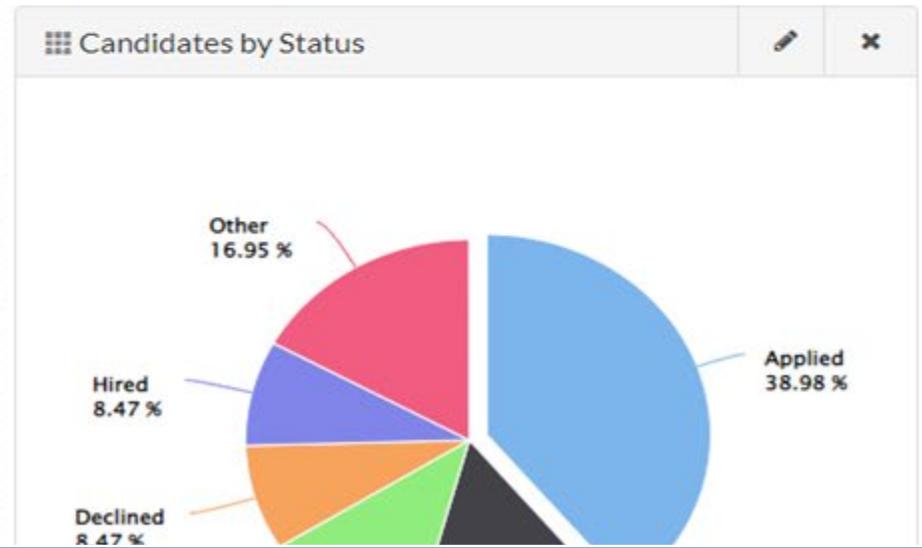
Click the **Administration** icon.

### Main Dashboard

#### Alerts

- [New Tuition Assistance Requests \(3\)](#)
- [Score this Appraisal - Appraisal \(Project Appraisal\) Justin Zinn](#)

[Show All](#)



1. Enable the 360s Administration Feature for Administrators and/or HRBP > Step A

Welcome Page

Task Management

Document Library

Bundles

Recipients

**Cross-Posting**

Accounts

Authorization Requests

Site Selection

Manage Referral Awards

Approve Award Plans

Manage Award Plans by Requisition

**Résumés**

Résumé Deletions

**Benefits**

Benefit Packages

Benefits

**Succession Planning**

Manage Succession Plans

Configure 9 Box

**Performance**

**Appraisals**

**360s**

Appraisal Administration

360s Administration

Workflows

360 Workflows

**Continuous Feedback**

**Goals**

Session Meeting Reasons

Goals

**Employee Recognition**

Employee Recognition Badges

**Global Settings**

**System Administration**

Custom Menus

Drop-down and Multi-Select Lists

Dynamic Forms

FAQs

Features

Groups

Languages

Notification Events

Page Options

System Settings

License File

**Your Organization**

Approval Chains

Competencies

Documents

Job Families

Job Profiles

Groups

Organizational Structure

Scales

Skills

Users

View Off-Boarded Users

**Support Tools**

Integrations Setup

**Learning**

**Courses & Classes**

Classes

Class Evaluations

Courses

**Logistics**

Buildings

Equipment

Rooms

B

Click Features.

1. Enable the 360s Administration Feature for Administrators and/or HRBP > Step B



Employees Search...



Administration / Global Settings / System Administration / Features

## Features

Groups

SELECT A GROUP \*  
-- Select --

C  
Select the group you want to grant access. For example, **Administrator** or **HRBP**.

1. Enable the 360s Administration Feature for Administrators and/or HRBP > Step C

Performance

D

Expand the **Performance** section.

360

Grants access to 360

E

Expand **360**.

**360 HRBP Administration**

This feature enables the 360 HRBP functionality. This includes the ability to filter HRBP employees only in our 360 Administration page.

**360s Administration**

This feature controls access to the 360s Administration screen

G

To allow members of the HRBP group to manage and launch 360 assessments for employees they are associated with, expand **360 HRBP Administration** and click **360s Administration**.

360 Only

This feature grants user to the 360 Only (stand alone 360 feature).

360 Workflows

Grants access to the 360 Workflows administration screen.

**360s Administration**

Grants access to 360s Administration for all employees where creation, copying, reassigning and deletion actions are available. This is typically an administrator function.

F

Select **360s Administration**.

Create 360

This feature allows users to create a standalone 360 for an employee.

Integrated 360

1. Enable the 360s Administration Feature for Administrators and/or HRBP > Step D, E, F, and G

Performance Workflow 

This feature allows users to create, edit and manage existing Workflows.

Rating Gap Chart

This feature gives the user access to the Rating Gap Chart via an employee's appraisal.

Require Final Approver 

Automatically uses a special field from the set up wizard as the approver for all appraisals.

View Workflow

This feature allows users to display the details of a Workflow (including weight distribution, appraisers, etc.)

Development

Learning

Demo Site 

CoreHR

 Update Features

H

Click Update Features.

A

Click the **Administration** icon.

### Main Dashboard

#### Alerts

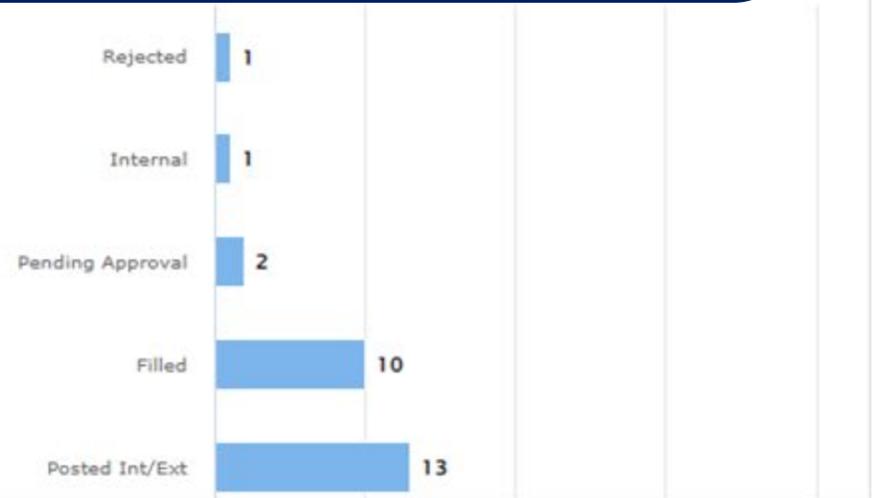
- [New Tuition Assistance Requests \(3\)](#)
- [Score this Appraisal - Appraisal \(Project Appraisal\) Justin Zinn](#)

Show All

#### Candidates by Status



Administrators can launch assessments, then rely on managers to add or verify participants, and to move the assessment from one phase to the next. It may be useful to add reminders of these tasks to the notifications sent automatically to managers when a 360 appraisal is launched for a direct report.



2. Launch an Individual 360 Assessment on the 360s Administration Screen> Step A

Welcome Page

Task Management

Document Library

Bundles

Recipients

**Cross-Posting**

Accounts

Authorization Requests

Site Selection

Manage Referral Awards

Approve Award Plans

Manage Award Plans by Requisition

**Résumés**

Résumé Deletions

**Benefits**

Benefit Packages

Benefits

**Succession Planning**

Manage Succession Plans

Configure 9 Box

**Global Settings**

**System Administration**

Custom Menus

Drop-down and Multi-Select Lists

Dynamic Forms

FAQs

Features

System Events

Page Options

System Settings

License File

**Your Organization**

Approval Chains

Competencies

Documents

Job Families

Job Profiles

Location Groups

Locations

Organizational Structure

Scales

Skills

Users

View Off-Boarded Users

**Performance**

**Appraisals**

Appraisal Administration

Workflows

**Continuous Feedback**

Session Meeting Reasons

**Employee Recognition**

Employee Recognition Badges

**360s**

360s Administration

360 Workflows

**Goals**

Goals

B

Click **360s Administration**.

**Learning**

**Courses & Classes**

Classes

Class Evaluations

Courses

**Logistics**

Buildings

Equipment

Rooms

**Support Tools**

Integrations Setup

2. Launch an Individual 360 Assessment on the 360s Administration Screen> Step B



Employees Search...



Administration / Global Settings / System Administration / Features

### 360s Administration

Bulk 360 Actions

Filter

<< < 1 2 3 4 5 ... > >>

Displaying 1 - 25 of 272 10 25 50 100 per page

EMPLOYEE NAME	EMPLOYEE ID	MANAGER	JOB TITLE	COMPANY/DIVISION	LOCATION	ACTIONS
Shawn Aaron		Theresa Phillips	Pump Station Operator (10894)	Mechanical Engineering	Headquarters	
No 360s exist for this employee.						
Sean Abrams		Frank Oliver	Landscape Designer (10675)	Architectural Engineering		
No 360s exist for this employee.						
Cody Addison		Philip Hathea	Cost Engineer (10805)	Project Management	Headquarters	
No 360s exist for this employee.						
				Mechanical Engineering	Headquarters	

C Locate the employee whose assessment you want to launch and click the Plus icon.

2. Launch an Individual 360 Assessment on the 360s Administration Screen> Step C

## Launch a New 360

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 Start from Scratch

D

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

Submit

Close Window



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.



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

Available Items	
Job Competencies (Competency)	+
Old Competencies (Competency)	+
Skills (Skill)	+

Selected Items	
Core Competencies (Competency)	Weight 50.0
Project Competencies (Competency)	Weight 50.0
Skills (Skill)	Weight 100.0

**Equalize Weights**    **Normalize Weights to 100**

← Previous    **Next** →    Cancel



A

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

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.

C

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

4. Categories Step > Step A, B, and C

## 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 %
<b>Total Weight</b>	<b>100.00</b>

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

< Previous **> Next** Cancel

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

# 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.

Alternatively, you can leave this tab blank, and let the manager and/or employee select participants.

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:

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

FOR EXTERNAL RATERS

jdoh@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.

< Previous | **Next** >

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

If managers will be adding participants and moving phases for the assessment, they access the assessment on the My Employees Screen. Consider reminding them of these steps.

Development Learning

<< 1 >>

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

This concludes the Launch 360 Assessments as an Administrator or HRBP quick steps.



Chris Clark Director of Staff Operations

PB: 3 Administration Headquarters

PHASE END DATE 02/15/2021

360 Degree Feedback ( 360 )	Assessment	Incomplete	N/A
360 Assessment ( 360 )	Planning	Incomplete	N/A

Expand



APPRAISALS	CURRENT PHASE	SCORE	PHASE END DATE
★ 2021 Company Appraisal	Performance	Incomplete	10/31/2021