**360 Participant Set-up, Update April 2014**

There are a number of issues with the current 360 Participant Colleague’s set up that give rise to poor customer experience and regular customer service emails. We would like to improve the experience and eliminate faults.

The end result will be a single click participant login and a single page for colleague set-up, completion status, self-assessment connection and report download, addressing the self-assessment availability problems.

As part of the same upgrade we would like to introduce an equivalent of the “External Link” set up that assigns time & reminders automatically from the set up date. This would enable the 360 product to be sold directly from a website or a link provided to participants that don’t set up when requested to complete in their own time.

1. Participant Login
2. Colleague set up page
3. Project Manger
4. Programme Manager
5. 360 External link
6. **Participant Login**

The current login details provide an account, user name and password. We would like to generate a link that take the participant directly to the set up page bypassing the Login Screen.

The resend button on the Programme management, view Participant list, would need to resend this direct link also. We would also need a button on this screen to generate the link so Account Admin can view/test the link. We need a Token for this link to be available for use in emails via utilities.

1. **Colleague set up page**

We would like a full review of this set up page.

1. Heading “Set up 360 feedback” instead of existing Set up your colleagues
2. Instructions, editable instructions set up from the Programme Manager screen.
3. Project and Programme boxes are completed automatically for the Participant, selectable when logged in as Account Admin (along with Participant). (Questionnaire screen is not needed)
4. Boxes for colleagues automatically displayed. Number of rows displayed selectable in Programme manager. More button to add more colleague rows. Three extra rows per click.
5. Boxes for Participant completion: Name, Email address and relationship. Relationship from drop down list. Save button for each line. Button changes to tick (or similar) as the colleague is saved to show that this entry has been saved. Participant can proceed to self-assessment or other if not all colleague boxes are completed.
6. Same line as name/email/relationship/save: Complete, Resend Link, Delete. Complete displays % or changes to Yes when Finish button at the end of the questionnaire is selected. Can we include all scores and comments from questionnaire in the report if % is over 30%?
7. Complete your self-assessment Button, Link (goes to self-assessment questionnaire. Shows % complete and Yes if complete. If this link is selected before colleagues are set up, message saying please set up your colleagues before completing self-assessment or make the link live when admin sets up participant.
8. Separate reminder email for self-assessment. Template selected in Project Manager. Link goes directly to self-assessment questionnaire, as for colleagues’ reminders and links. Email token needed for self-assessment link.
9. Report available box displaying the date when the report is available followed by a button to download the report.
10. **Project management Admin**

Changes needed in the admin Project Management screen:

1. Self-assessment reminder template selection. Add a reminder to the self-assessment with a direct link to the questionnaire –if the self-assessment is not complete. Sent on the date of the colleague reminders.
2. **Programme management Admin**

Changes needed in the admin Project Management screen:

1. Set up instructions. Box for 5 line of text to appear on the Participant set up page.
2. Colleague number. This defines the number of fields to enter colleagues. Entering 12 in the box would give 12 fields for Peers, Customers etc. on the participant set up page. The “More” button would add 3 for any participant wanted to add more. Selecting the button a second time would add 3 more – also for further multiple selections.
3. **360 External Link**

We would like to create a link that can be displayed on a web site that goes to an open date Project/Programme 360. The time from set up to completion is set in Programme manager, usually 3 weeks. When the participant saves the first colleagues the dates are set.

Selecting the link takes the Participant to a registration screen. (Similar to the Personality screen). First Name, Last Name, Email, Company.

Completing this screen takes the participant straight to the set up page but also send the email with set up link to participant as if admin had set it up. Also send email to admin, Participant Name and email has set up for programme name.

Store the Company, if given in the User manager screen.

Add fields to user manager field, Programme Name, Set up date

Add set up date to View Participant List, enable sort by this date. ( So we can view recent participants that have set up and repeat logon details if needed)

If the link is selected today, the participant sets up colleagues, the reminders are set as fixed time from the set up date, typically 14 days and 18 days, feedback closes at 21 days and the report is automatically sent to designated emails; participant or email address or both.

Programme manager would need a “Open Date” selection to override the reminder dates and add the “days” to first reminder and second reminder.

Please price this external link work separately from the other areas.