FindingPotential

Assessment Manager – Quick Start Guide

great{with}talent

Quick Start Guide

Introduction

The **FindingPotential Assessment Manager** has been built firmly with you in mind so please do not feel that you need a whole load of "system" training. The service is extremely easy to use but you do need to spend ten minutes reading this document and familiarise yourself with the key aspects of managing candidates.

System Requirements

All you need is a modern browser. We support all major browsers – Microsoft Edge, Firefox, Safari and Google Chrome. All we ask is that you have Cookies and JavaScript enabled. We provide help and support if our minimum system requirements are not met.

System Login

To access the Assessment Manager go to https://www.greatwithtalent.net and add this page to your browser favourites.

Login to the system using your username and password provided to you or use those provided by you during the sign-up process. Both username and password are case sensitive.

If you forget your login details you can retrieve them by going to https://www.greatwithtalent.net and then select "Forgot your login details".

The Assessment Manager

The FindingPotential Assessment Manager is effectively split into two "streams" to manage candidates:

Assessments

The "Assessments" stream is used where you wish to assess people's ability, personality and other measurements in recruitment or development campaigns. Manage these candidates and assessments using the **Assessments Menu** in the top navigation bar.

360s

The 360 stream is used for managing 360 projects. A "focus" or "self" can be easily added along with their raters. Manage 360s using the **360s Menu** in the top navigation bar.

Assessments

Assessments - Add Candidate

Select 'Add Candidate' from the **Assessments** menu located at the top of the page.
Complete the Add Candidate form and choose several questionnaires for completion. Once submitted an invite email containing a unique link to their 'Assessment Hub' will be sent to the candidate.

📢 Tip

Add on yourself as a test candidate now, select a Personality questionnaire and one of the other tests/questionnaires that are available. When your invite email has arrived, click the link through to your Assessment Hub and complete the questionnaires to familiarise yourself with the candidate experience.

Assessments - Active Candidates

Select 'Active Assessments' from the Assessments menu located at the top of the page.
You will see a list of your candidates and the assessments they have been assigned. The status of each assessment is shown via coloured icons:

Red – Incomplete; **Orange** – In Progress; **Green** – Complete & Reports Available

Click on the name of the candidate to view the candidate's details. From here you can:

- Generate reports for any completed assessments
- Delete or assign additional assessments
- Edit the candidate's details
- Delete the candidate (and all data related to the candidate)
- Send reminder emails for incomplete assessments.

> 📢 **Tip**
>
> If you completed a test questionnaire, click on the test candidate's name to generate a report.
> The report opens in a new browser window.

You can access group reporting features from the Active Assessments page – e.g. ability test score comparisons. For ease make sure you candidates are assigned in campaigns, see below.

Assessments - Manage Candidates

Campaigns

Campaigns allow you to assign your candidates into more manageable groups. For example, you may have a specific recruitment campaign, job, or development programme.

> 📢 **Tip**
>
> Assigning candidates to campaigns is important as it will enable you to compare candidates using our group reporting features.

Add Campaign

Select 'Campaign Admin' from the 'Candidates' menu located at the top of the page. On the right hand-side simply create a new campaign by entering a description and clicking 'Add'. When you add a candidate you will then be able to select this campaign or edit any existing candidate to assign them.

Note: all users in the Assessment Manager are pre-assigned one default campaign called 'General'.

Delete Campaign

Under 'Action' for a particular campaign, click the delete icon. This will remove all candidate data (both Active and Archived Candidates) and cannot be undone.

Archive Candidates

Candidates can be moved to the "Archive" and their data available for later reference. Any candidate can be moved into the Archive by clicking the icon.

360s

360s – Add a Focus/Self

Select 'Add Focus/Self' from the **360s** Candidates menu located at the top of the Assessment Manager. Complete the Add Focus/Self form. During completion of the form you can also select "Allow Focus/Self to choose raters" so that the Focus/Self can nominate the raters they would like.

Once the form has been submitted an invite email containing a unique link will be sent to the Focus/Self – this will either be to the 360 questionnaire start page or to a page where their raters can be added.

◀))) Tip
Add on yourself as a test 360 Focus/Self by choosing any of the competency models available to familiarise yourself with the Focus/Self experience.

360s – Add Raters

Once a Focus/Self has been added, their Raters can be added by the user/administrator. Within the Assessment Manager we have the following five categories of rater:

	Focus/Self:	The focus of the 360 Assessment.
	Manager:	The manager of the Focus/Self.
	Colleague:	A person who works closely with the Focus/Self but is not their manager or a direct report.
	Report:	A person who reports directly to the Focus/Self.
	Other:	All other raters e.g. someone who receives a service from the Focus/Self.

Raters can be added by accessing the '360 Assessment Details' page for a Focus/Self.

To do this, go to 'Active 360s' via the **360s** menu located at the top of the Assessment Manager. Click on the name of the relevant Focus/Self to access their 360 Assessment Details summary page.

Add a new rater by inserting First Name, Last Name, Email Address in the relevant fields and select a Rater Type from the drop down menu.

Once added, an invitation email is automatically sent to the rater (with a link to the 360 Assessment) and the rater will now appear under the relevant Rater Category on the page.

🔊 Tip

Add on a test rater, this could be yourself or a colleague.

Once all raters have been added for the Focus/Self, you can track completion rates on the '360 Assessment Details' page for a particular Focus/Self.

Note

The Completion Due Date of the rater is the same as specified for the Focus/Self. great{with}talent will automatically send reminder emails for all raters until the Completion Due Date has been reached.

360s – Manage Completions

There is a **minimum** number of raters required in each rater group in order for 360 reports to be generated:

🟩	**Focus/Self:**	1 Completion required
🟦	**Manager:**	1 Completion required (except FeedForward)
🟥	**Colleague:**	2 Completions required to ensure **anonymity** of respondents
🟧	**Report:**	2 Completions required to ensure **anonymity** of respondents
🟪	**Other:**	2 Completions required to ensure **anonymity** of respondents

For Traditional 360s there is a **maximum** number of **6** completed raters in the Colleague, Report and Other rater groups. (It is possible to increase this number but you will need to contact us).

For FeedForward 360 there is a **maximum** number of **9** completed raters in the Colleague, Report and Other rater groups, and up to **5** Managers.

It is very likely that the Focus/Self will not receive all the completions required in the Colleague, Report or Other rater categories. If this happens, simply combine completions for these rater groups into a single rater group (probably the 'Other' rater group).

Click on the completed rater's name to access the 'Edit Rater' page and change the Rater Type to re-assign them.

360s - Generate Reports

Report generation links become available on the '360 Assessment Details' page for a particular Focus/Self when **both** the Focus/Self and Manager have completed their questionnaires.

The minimum number of raters required for each rater group needs to be met for the rater group to **appear** in the report. As described above, combine raters to a single rater group (e.g. Other) to produce summary responses for those raters.

Once generated, reports can be printed directly or saved as PDF documents and emailed to the Focus/Self in preparation for a 360 feedback.

Your Account

🏆 Super Users
The following information applies to users with special privileges, only 'Super Users' can perform actions associated with **Global Account Settings** and **User Administration**.

Global Account Settings

Settings specific to some, but not all questionnaires, can be changed under Global Settings. One of the most common changes is whether or not candidates receive feedback reports upon questionnaire completion.

User Administration

Add new users using the form on the right in the User Admin page. Select 'Edit' under the Options header to change user details. Blocking user access to the Assessment Manager is also set under the Options header.

We recommend that all users change password every 3 – 6 months.

Email Reminders

great{with}talent automatically sends reminder emails each Thursday at 10:00am GMT to candidates and raters who have not completed their assessments. We only do this if the candidate or rater has a requested completion due date **within** four weeks.

Reminders are **not sent** where the completion due date is greater than four weeks or the completion due date is in the past.

Help & Support

For general help or a system issue please contact our support desk at support@greatwithtalent.com. This is the most effective way of making support contact with us. If you would like to speak to someone please call great{with}talent on +44 (0) 333 012 4649 and select Technical Helpdesk at the voice prompt.