Enterprise Feedback Suite

EFS Leadership

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0 Introduction

EFS Leadership is a module of the Enterprise Feedback Suite which has been optimized for multi-source feedback processes and in particular 360° leadership surveys.

- The feedback questionnaire itself is created with EFS Survey. EFS Survey is Quest-Back's software solution for complex online surveys. It fulfills the most advanced requirements of Market Research and Enterprise customers.

- In the EFS admin area, project management can rely on powerful, dedicated tools for process control and participant administration.

- Each multi-source feedback includes an online platform, the so-called feedback center. In standard scope, this feedback center is either a download platform or a central login to the feedback questionnaires. If the partcipating managers are involved in the feedback preparations themselves, e.g. by selecting their feedback providers, the feedback center can optionally be extended to include the necessary functionalities.

- In standard scope, results are presented in reports which can be downloaded from the feedback center: These reports are usually generated by QuestBack. Optionally, dashboards can be made available, based on Data Voyager 2.0.

1 Creating a Multi-Source Feedback

This Chapter describes all the main work steps to be taken when starting a new project:

- If you are working with EFS for the first time, you will get to know the admin area of EFS Leadership (Chapter *1.1, p. 9*).

- You create your first multi-source feedback (Chapter *1.2, p. 11*).

1.1 Finding Your Way Around EFS Leadership

When logging into EFS Leadership for the first time, this Chapter helps you to get a first overview in the administration area.

> For a detailed introduction, please see "EFS Survey", Chapter 1 and 2.

1.1.1 Logging In

In order to log into the administration area of an EFS Leadership installation you need a valid account and a password. Usually you will find the log in under the URL http://www.your-domain.com/www/

> You have forgotten your password or account name? Click on the corresponding link: after answering the security question, you will receive an e-mail with a link that allows to reset the password.

1.1.2 The Start Page

After logging in, the start page is opened. Here, you see on first gaze:

- current EFS news

- an overview of currently active surveys ("surveys in the field") and remaining time.

- shortcuts to the surveys you are currently working on, with details on the survey status.

Figure 1.1   Start page

> Is the admin area displayed in the wrong language? Select the desired language in the drop-down list in the right upper corner.

First, let's have a look at key features which are always visible when working in EFS.

1. Shortcut links

The links in the right upper corner allow to access your account data, change the language, invoke customer center, online help and feedback form or to log out.

2. Navigation bar

The navigation bar which is always visible when working in the admin area provides access to five functional areas:

- **Start**: EFS news, overview on active surveys and shortcuts to surveys you were working on recently.

- **Projects**: Your surveys.

- **Users**: Administration of user accounts for the admin area and configuration of access rights.

- **Libraries**: Re-usable content, as e.g. surveys, media files and mail templates.

- **Options**: Features which allow to modify EFS behavior according to your own personal preferences, general system settings and functions for platform administrators.

3. Breadcrumb

The breadcrumb makes orientation and navigation easier: You always know on which level of the menu you're working, and you can swap from one level of the menu to another by just clicking on a breadcrumb link.

1.1.3   The Project List

Open the **Projects** module in the navigation bar. The project list is opened.

Figure 1.2   Project list

If your feedback project has already been created, you can skip the following Chapter. Open the project by clicking on the title instead, and read on in Chapter *1.2.2, p. 12*: It explains how to configure the project.

If the new feedback project has not been created yet, read the next Chapter.

1.2   Creating a Multi-Source Feedback

If the new feedback project has not been created yet, then this is the first step you should take. Create a new project according to the instructions given in "EFS Survey", Chapter 3.2. *Make sure to select the project type "Multi-source feedback".*

Figure 1.3   Creating a MSF project

Please note: The "multi-source feedback" project type (acronym: MSF) can only be used on EFS Leadership installations.

1.2.1 Differences to Other EFS Project Types

A multi-source feedback differs from familiar EFS project types, as e.g. anonymous surveys and personalized surveys, in several basic aspects:

- The menu **Statistics** is not available.

- The menu **Test and Validation**->**Project check** is not available.

- The initial passwords of participants are visible (provided you have the necessary access rights). But after the first change, the passwords cannot be accessed or sent by e-mail anymore.

- Host names and IP addresses cannot be determined.

1.2.2 Configuring Project Properties

First, it is necessary to define general framework data and settings for the new project.

- General settings for all EFS project types are configured in the **Project properties** menu. This includes, for example, survey URL, field time, survey messages and languages. For detailed explanations, please check "EFS Survey", Chapter 3.7.

- Settings which are special to the multi-source feedback process are configured in the **Process configuration** menu. Chapter *3, p. 17* is dedicated to this topic.

2 Using Master Data and Process Data

As in other EFS project types, various types of data are defined, collected and used in multi-source feedbacks.

- While the participants complete the questionnaire, EFS collects the same data as in other project types: result data, URL parameters and user-defined variables. ("EFS Survey", Chapter 14.8).

- Address data and other personal information on the participants who are specified in participant administration are called *master data* (Chapter *2.2, p. 14*).

- Furthermore, there are the so-called *process data* (Chapter *2.3, p. 14*): They contain information that does not describe the respective person in general, but refers to their current position (i.e. role, feedback status etc.) in a specific feedback constellation. The content of these variables is set either automatically by the system or by the project manager.

Before starting to configure the feedback process and importing partipants, you should check if the structure of master and process data fits for your requirements, or if modifications or additions are needed (Chapter *2.1, p. 13*).

In this chapter, you can find:

- a short introduction to master data (Chapter *2.2, p. 14*) and process data (Chapter *2.3, p. 14*) including overviews on the default variables.

- a short instruction how to change the specification of existing variables or how to create new variables (Chapter *2.4, p. 15*).

- an overview on features that allow to use master data and process data for dynamics in the questionnaire and in the feedback center (Chapter *2.5, p. 15*).

2.1 Organization Tips

The following tips will help you with your planning and organization:

Planning the data structure of the participant administration

Think about which master data you want to store for the participants.

- Check whether the existing data structure meets the requirements of your current project, and adjust it if necessary. See Chapter *2.4, p. 15*.

- Often you need to be able to select specific participant groups in a targeted manner, e.g. to successively send invitation mails to the various departments of a company or to be able to split according to particular characteristics such as customer type, for example, in the evaluation process. Consider precisely which subsets you will need in the course of the project and in the evaluation process and how they can be optimally represented in the participant administration.

Checking the data structure for the feedback process

Check if additional process data are needed.

- Check whether the existing data structure meets the requirements of your current project, and adjust it if neccessary. See Chapter *2.4, p. 15*.

2.2 Master Data

Master data are the participants' personal data, as e.g. name and address. These data are usually imported by the project manager and used for authentication or to contact the participants.

- Inside EFS, the master data are available whereever information on the participants is needed for personalization, routing or analysis.

- A separate export of the feedback participants' master data is available in the men **Participant administration**->**Participant Pool**->button **Excel export** and **CSV export**.

- If you have sufficient rights, a combined export of master and result data is available for documentation or external analysis (Chapter *7.3, p. 50*).

You can view the master data variables and their answer options in the menu **Participant administration**->**Participant variables**->**Master data variables**.

2.2.1 Overview of the Master Data Variables

The table below lists the default master data variables.

Variable name	Variable name in SPSS and Excel export	Meaning
u_account	u_account	Personnel number
u_title	u_title	Title
u_firstname	u_firstname	First name
u_name	u_name	Name
u_email	u_email	E-mail
u_unit	u_unit	Organizational unit
u_gender	u_gender	Gender
u_initial_password	u_passwd	Initial password
mod_date		Last modification
cr_date		Date of creation

Table 2.1   Master data

2.3 Process Data

The so-called *process data* allow to track and store the position of a participant (i.e. role, feedback status etc.) in a specific feedback constallation, and to use it for process control and administrative purposes.

- The *default* process data are used in various situations during the feedback process. E.g. it usually depends on the participants' role if and which report they receive for a specific feedback constallation.

- Some default process variables are included in the export data records and can be used for external analysis (Chapter *7.3, p. 50*).

- *User-defined* process data are available in participant administration. They can be activated for MSF statistics. Furthermore, they are part of the MSF participant export and the MSF wave export.

You can view the process data and their answer options in the menu **Participant administration**->**Participant variables**->**Process variables**.

2.3.1   Overview of the Process Data

The table below lists the default process data.

Variable name	Variable name in SPSS and Excel export	Meaning
u_role	role	Role
u_stats	u_stats	Feedback status
m_date	m_date	Date of change
c_date	c_date	Date of creation
u_language	u_language	Language version In multilingual projects, this variable is usually linked with the survey languages specified in **Project properties**->**Survey languages** ("EFS Survey", Chapter 16.2.6).
u_group	u_group	Wave

Table 2.2   Process data

2.4   Editing Master Data and Process Data

Master data and process data are user-defined, i.e. you can modify the default variables and create additional variables.

Therefore, prior to creating the participants, check whether the data structure of the participant administration meets the requirements of your current project, and adjust it if necessary.

- Variables for storing basic properties of the participants can be relabelled or otherwise modified.

- If you want to store additional data, you can create additional variables.

The corresponding functionalities are introduced in detail in "EFS Survey", Chapter 11.2.

2.5   Using Master Data and Process Data in Questionnaire and Feedback Center

Master data and process data can be used for dynamics in questionnaire and feedback center:

- The data can be output in the questionnaire, see Chapter *4.1, p. 28*. The piping feature newly introduced in EFS 10.3 simplifies selection of the wildcards for the desired data.

- The data can be used for dynamics in the questionnaire, as e.g. filtering or checking of answers with plausibility checks. See Chapter *4.2, p. 28*.

- The data can be used to personalize e-mails, see Chapter *5.10.1, p. 44*.

- The data can be output in the personalized part of the feedback center by using wildcards in the Smarty templates.

3 Configuring the Process

Settings relevant for the whole feedback process are configured in the menu **Process configuration**.

- The tab **Overview** in the **Settings** submenu which is opened automatically shows the basic settings.

- On the other tabs in the **Settings** submenu, you configure the most important features of the process: The feedback center can be activated and you can define feedback statuses and roles.

- In the **Report definition** submenu, reports are defined and allocated to roles.

- If the project has an external view, the features and layout are configured in the **Feedback center** submenu.

This chapter describes all the work steps involved in the configuration of the feedback process:

- In Chapter *3.1, p. 17* you will find tips and hints for your project planning.

- Chapter *3.2, p. 18* provides a brief explanation of how to define reports.

- Chapter *3.3, p. 19* explains how to map the participant constellations of a multi-source feedback using EFS Leadership roles.

- Chapter *3.4, p. 23* explains how to map the steps of a feedback to EFS Leadership feedback statuses.

3.1 Planning and Organization Tipps

A multi-source feedback is a complex process that requires careful preparation. The following guiding questions and tips will help you with your planning and organization.

3.1.1 Dashboards and Reports

The presentation and distribution of the feedback results via dashboards and conclusive reports is actually the main part of a multi-source feedback.

Planning the presentation of results

Think about how the results of the feedback are to be edited and presented.

- Do you intend to use dashboards?

- Do you intend to use reports?

- Who is to have access to which results?

- In which phase shall the results be available?

Determining the demand for additional documents

In addition to the results reports other documents are often also provided, such as general information on the aim of the feedback process or on the protection of data privacy.

- Are there any plans to issue such documents?

- Who is to have access to which documents?

- In which phase shall the documents be available?

Planning downloads

There are two options for organizing downloads with EFS Leadership:

- Downloads can be performed directly in the feedback center.

- The content of dashboards can be downloaded formatted as a DIN A4 PDF.

3.1.2 Role Distribution

The establishment of appropriate feeback roles and the careful configuration of access rights are essential for smooth conduct of the multi-source feedback.

Defining roles

Think about who is to have access to the feedback center, and for which purposes.

- Identify the participant groups and list the respective access rights and functions these groups require.

- Allocate appropriately configured roles to represent the participant groups.

Access rights of the feedback participants

Plan the allocation of roles to the content and features of the feedback center and the feedback phases.

- Which roles are to have access to which dialogs in feedback center?

- In which phases do these roles require this access?

- Plan the allocation of roles to the reports and dashboards.

    - Which roles should receive which reports?

    - Which roles can access which dashboards?

3.1.3 Process Progress

Based on the considerations above, determine the appropriate feedback statuses.

- Which feedback statuses fit for your feedback process?

- Specify which situations in a specific feedback match which dedicated status, which work steps should cause a change of status and which data (e.g. questionnaire, return, reports) the persons involved should be able to access with a given status.

- Should specific changes of status be triggered centrally for all feedbacks?

- Should specific changes of status be triggered automatically at specific dates?

- Do you want to receive an e-mail notification if an automated change is executed?

3.2 Defining Reports

In the first step, you should define the reports that will be generated on the basis of the feedback results. This is necessary at this early stage of the feedback process for several reasons:

- In the next step, you will define the roles used in the feedback process and their respective rights. In order to do so, you should already know which reports the various groups are to access later on.

- In addition to the result data, other documents are often also provided, e.g. information regarding the feedback process or the protection of privacy. These documents should be available to the users already at the beginning of the process.

Figure 3.1   Defining a report

3.3   Configuring Feedback Roles

The various roles which a participant may have in specific feedback constellations, as e.g. "self-assessment", "superior", "direct report" or "peer", are specified at the beginning of the project.

- Each role is automatically assigned an unambiguous ID by the system. Via this ID, participants can be allocated to their roles e.g. during import.

- The roles can be labelled bilingually, e.g. in English and German. Furthermore, acronyms can be defined in both languages, which are used e.g. in overview tables.

- The role defines if a participant in this role may get a questionnaire or a report. Access to feedback center functionalities or to a Data Voyager dashboard is role-dependent, too.

The roles are defined in the menu **Process configuration** on the tab **Roles**.

This chapter will teach you how to create and configure the roles your project requires.

- Chapter *3.3.1, p. 20* explains the role administration.

- Chapter *3.3.2, p. 20* provides an overview of the default roles.

- Chapter *3.3.3, p. 21* will teach you how to create new roles.

3.3.1 Overview of the Existing Roles

You can view and edit the roles of your project in the menu **Projects**->{**Selected project**}->**Process configuration** on the **Roles** tab.

Figure 3.2 Feedback roles

Chapter *3.3.2, p. 20* presents the default roles available when creating a new project. The table lists each role along with the following information:

* ID: unique identifier of the role.

* Role: Label and abbreviation.

* Gets questionnaire: This column shows if the role occupants themselves participate as feedback providers in the survey.

* Min / Max: If the role occupants are focus persons, these values show how many feedback providers should be allocated to each of them at least / at most.

* Reports: This column shows if and which report the role occupants receive.

The following actions are available:

* **Edit**: Opens the edit dialog shown in Figure *3.3*.

* **Copy**: The role is copied.

* **Delete**: The desired role will be deleted following a confirmation prompt. Please note: The role "self-assessment" cannot be deleted, it can only be reconfigured.

3.3.2 Roles in Standard Configuration

The following table presents the default roles available.

The role "self-assessment" cannot be deleted. But the configuration can be modified.

Role	Abbrevia-tion	Meaning in standard configuration
Self-assessment	SA	Self-assessment The role occupants are the subjects of a feedback, i.e. the focus persons, and they are evaluated by the feedback providers. If configured accordingly, they will themselves receive a self-assessment questionnaire. In each feedback constellation, there can be only one person allocated to this role.
Superior	SU	Superior The role owner is the direct superior of the respective focus person. In each feedback constellation, there can be only one person allocated to this role.
Direct reports	DR	Direct reports The role owners are subordinated managers or subordinated staff of the respective focus person.
Peers	PE	Peers The role owners are on the same hierarchic level as the focus person.

Table 3.1   Roles in standard configuration

3.3.3   Creating Roles

1. In the **Projects**->{**Selected project**}->**Process configuration** menu, click on the **Create role** button on the **Roles** tab.

Figure 3.3   Creating a feedback role

2. The system automatically assigns an ID to the role.
3. Select a label and an abbreviation.
4. Specify which reports participants with this new role are to receive.

5. Confirm by clicking on **Save**.

3.3.4 Changing the Allocation of Roles to Reports

You can change the allocation of roles to reports later. To do so, go to the role overview and use the **Edit** icon to open the editing dialog shown in Figure *3.3*. In the "Allocation of role to report" section, you can find all defined reports. Change the allocation as required.

3.3.5 Defining Report Groups

A report group is aggregated from several roles. Report groups can be used e.g. to modify the role definitions for analysis and report generation, or to aggregate the results of several feedback roles if their individual return is too low.

E.g. to create a report group „Direct reports / Peers" based on the roles 3 "Direct reports" (DR) and 4 "Peers" (PE), you can proceed as follows:

1. Configure the roles "Direct reports" and "Peers" as described above.

2. Go to **Projects**->{**Selected project**}->**Process configuration**->**Report definition** ->**Report groups**.

3. Define the new role "Direct reports / Peers" with the following criteria:

   – Minimum return rate

   – Minimum number of answers per item

4. In the section "The report group contains the following roles", select "Direct reports" and "Peers".

Figure 3.4   Defining report group

5. Confirm by clicking on **Save**.

Anonymity rule: To generate a report, there must be sufficient return for each individual feedback role. The minimum number of returns per feedback role is configurable. It is recommended to use at least "3". This prevents that the focus person can find out what a specific feedback provider has answered by clever splitting. The role "Superior", on the other hand, is an exception: it is allocated unambiguously and therefore the answers can be identified.

You can find the actual returns for the feedback in the statistics in the focus persons overview.

3.4   Configuring Feedback Statuses

Feedback statuses are used to map the complex workflows of a feedback process into EFS Leadership.

- The feedback statuses describe both the progress of the overall feedback process (Feedback phase->Reporting phase->Closure of process) and the progress of individual participants (Feedback phase->Feedback finished) in a specific feedback constellation.

- In the following Chapter, the default feedback statuses are introduced as implemented in a new multi-source project.

- Chapters *3.4.2, p. 24* and *3.4.3, p. 25* explain the features for administrating statuses and creating new statuses.

- Chapters *3.4.5, p. 25* and *3.4.5, p. 25* explain how to use the statuses for process control.

3.4.1   Feedback Statuses in Detail

The following table lists the default feedback statuses. The processes related to the various statuses depend on the specific feedback scenario: The column "Default scenario" describes the process which runs in a default multi-source project without any customization.

- The default statuses are fix, only the labels can be changed.

- The sequence of statuses is defined by the ID.

- Additional user-defined feedback statuses should be in the range between 5 and 100, i.e. between the fixed start and end phases "Initial" (5) and "Process closed" (100).

- Only additional user-defined feedback statuses can be deleted.

ID	Label	Default scenario
5	Initial	Initial status of the feedback. When the focus person gets the invitation, he or she can log in to the feedback center.
10	Password changed	The focus person has logged in to the feedback center and changed the initial password.
20	Validation	The focus person has to validate the selected feedback providers.
30	Approved	The selected feedback providers have been approved.

Table 3.2   Feedback statuses

(Forts.)ID	Label	Default scenario
50	Feedback	The feedback providers are invited to the feedback and complete the questionnaire. If the return is not satisfactory, reminders are sent. The focus person can access the return data and the dashboard.
55	Feedback finished	The feedback providers cannot access the questionnaire anymore, i.e. the result data of the feedback cannot change anymore. Usually, the focus person is still able to access the return data and the dashboard. Project management prepares the reports for download.
60	Reporting	The focus person and maybe other report recipients as well can download the reports in the feedback center.
65	Reporting finished	
100	Process closed	The feedback process is completely finished. The persons involved cannot access the reports in the feedback center anymore. If all feedbacks in the project have reached this phase, project management can finish the project.

Table 3.2   Feedback statuses

3.4.2   Overview of the Existing Feedback Statuses

You can view the feedback statuses of your feedback process in the **Projects**->{**Selected project**}->**Process configuration** menu on the **Feedback status** tab.

Figure 3.5   Feedback status

In new projects, there are nine default statuses (an overview is provided in Table *3.2*). The table lists each status along with the following information:

• ID

- German and english label of the status
- Name
- **Delete**: User-defined statuses can be deleted.

3.4.3 Creating Additional Feedback Statuses

1. In the **Projects**->{**Selected project**}->**Process configuration** menu, open the **Feedback status** tab.
2. The last line is blank: Enter the ID and the german and english label for the new status.
3. Confirm by clicking on **Save**.
4. The status will be inserted at the appropriate position according to its ID.

3.4.4 Changing the Feedback Status

The statuses can be changed at several places.

- Manually:
  - The participants of all or selected waves can be set to another status manually. **Participant administration**->"Actions" drop-down list.
  - All or selected focus persons can be set to another status manually. **Participant administration**->{**Selected wave**}->"Actions" drop-down list.
  - The status of a single focus person can be changed manually in the detail view. **Participant administration**->{**Selected wave**}->**Edit focus person**->**Process information**.
- Automatically:
  - All participants of a specific wave can be set to another status automatically (Chapter *3.4.5, p. 25*).
  - All participants of a specific wave with one or several specific statuses can be set to another status automatically (Chapter *3.4.5, p. 25*).

3.4.5 Automating Status Changes

EFS supports automated status changes at predefined dates. Depending on the feedback scenario, the change may affect *all* participants in a wave or only participants *with specific statuses*.

To specify a status change, please proceed as follows:

1. Open **Participant administration**->**Wave**.
2. Search the wave you want to modify and click the **Edit wave** icon.
3. Click on **Define status change**.

Figure 3.6 Defining automated status change

4. In the field "Execute date", you specify when the change should be triggered.

5. In the field "From status", select the status(es) that participants should have to be included in the status change.

   – If you select "All", the status of all participants in this wave will be changed.

   – If you select one or selveral statuses, the change will only affect those partici-pants who have this status at the execute date.

6. Set the target status in the field "To status".

7. Depending on the target status, additional fields may appear. A change to target status "Feedback", for example, can include an immediate dispatch of invitation mails. For this purpose, you have to activate "Send invitation mails" and select the appropriate mail template.

8. Optionally, you can enter your e-mail address into the "E-mail" field. Then, you will receive a notification as soon as the status change has taken place.

9. Confirm with **Define status change**.

3.4.6   Using Statuses for Access Control

Access to data and features in feedback center depends on the statuses:

- During report definition, you specify the status participants should have to down-load the report (Chapter *3.2, p. 18*).

- Access control for feedback center is dependent on the statuses, too.

3.5   Setting up and Configuring the Feedback Center

Multi-source feedbacks include a default feedback center. Depending on the feedback process used, the feedback center can serve e.g. as central login for feedback partici-pants or as a download platform.

- Usually QuestBack will set up and configure the feedback center.

- Frequently, feedback processes require strong customizations, i.e. *special programming for which a fee is required*. This are offered and realized by QuestBack, too.

4 Designing the Feedback Questionnaire

The "EFS Survey" manual explains in detail how to create questionnaires in the questionnaire editor. In the following, you will be introduced to a few pecularities and functions which are specific for the project type "Multi-source feedback":

- Displaying MSF data in the questionnaire
- Using multi-source feedback data in condition editor

Via the online help, you can access the "EFS Survey" manual. It is also available for download in the customer center.

4.1 Displaying MSF Data in the Questionnaire

You can display MSF-specific data in the questionnaire. From EFS 10.3, *piping* simplifies the insertion: a dedicated dialog shows all available data. All you need to do is select the appropriate content.

- Master data and process data are labelled as usual (Table *2.1* and *2.2*).
- Master data and process data of the focus person in the current feedback constellation are labelled with the prefix "fb_recv_" (Table *5.2*).

For detailed information on dynamic content replacement and piping, please check "EFS Survey", Chapter 7.5.

4.2 Using MSF Data in Condition Editor

In the condition editor, you can use feedback data e.g. for filtering or hiding conditions.

- Master data and process data of the current participant are labelled as usual (Table *2.1* and *2.2*).
- Master data and process data of the focus person in the current feedback constellation are labelled with the prefix "fb_recv_". (E-mail and questionnaire wildcards follow the same scheme, see Table *5.2*.)

5 Participant Administration

In this chapter, you are introduced to the multi-level participant administration of multi-source feedbacks.

- Chapter *5.1, p. 29* explains the basic principles.

- In the following Chapters *5.2, p. 30* to *5.5, p. 33*, the four levels are presented in detail.

- Afterwards, typical participant administration workflows are explained step by step:

  - Feedback participants and feedback constellations are specified manually by the project manager (Chapter *5.6, p. 34*).

  - Feedback participants and feedback constellations are imported by the project manager (Chapter *5.7, p. 38*).

  - The feedback participants are created by the project manager, the feedback constellations are defined by the focus persons (Chapter *5.8, p. 43*). *This scenario is realized optionally on project base. It needs special programming.*

5.1 The Level Concept

In multi-source feedbacks, the participant administration has a multi-level structure. I.e. the participants' data can be viewed and edited from several perspectives.

The levels in overview:

- Participant pool:

  - The participant pool contains all participants which have been registered in the system, including their master data.

  - The persons in the participant pool are not necessarily allocated to a feedback constellation. They can be administrated on this level initially, and allocated to feedbacks at a later date.

  - Menu **Participant administration**->**Participant pool**.

- Wave:

  - Multi-source feedbacks are frequently realized in so-called waves, i.e. in staggered intervals. Thus, various parts of a company or various hierarchy levels can be surveyed at different points in time.

  - On the wave level, you can find all existing waves with their current return rates.

  - By opening a wave, you can access an overview of its' focus persons: Each of them represents a specific feedback constellation. By clicking on a specific focus person, you can access a list of all persons who provide feedback to that focus person, i.e. who are part of his or her feedback constellation.

  - Menu **Participant administration**->**Waves**.

- Focus persons:

  - This level presents the wave's focus persons, each of them representing a specific feedback constellation.

 – Menu **Participant administration**->{**Selected wave**}.

- Feedback providers:

 – On this level, you can find a list of all persons who provide feedback to the selected focus person, with their respective role in this specific feedback constellation.

 – Menu **Participant administration**->{**Selected wave**}->{**Selected focus person**}.

5.2 Participant Pool

The participant pool contains all participants of the multi-source feedback which have been registered in the system, including their master data.

The filling process for the participant pool depends on the chosen feedback process:

- If all feedback constellations are known prior to the start of the process, they are entered manually or imported together with the related participant data. Once entered, the participants are automatically visible in the participant pool. This process is explained in Chapters *5.6, p. 34* and *5.7, p. 38*.

- If the feedback constellations are not fully known beforehand, the participants are usually imported directly into the participant pool. The allocations to feedbacks can happen at a later date. E.g. the focus persons can be enabled to select their feedback providers themselves. This process is explained in Chapter *5.8, p. 43*.

- Optionally, focus persons can be enabled to nominate persons who are not registered in the system. *This scenario is realized optionally on project base. It needs special programming.*

You can find the participant pool in the menu **Participant administration**->**Participant pool**. The features on the neighbouring **Statistics** tab allow to monitor the composition (Chapter *5.2.2, p. 31*).

5.2.1 Administrating Participants

On the **Participant pool** tab, you can find the following information for each participant:

- Name, First name

- Personnel number

- E-mail

- Organizational unit

- Overview on the roles occupied by the participant

The following actions are available for administrating the participants:

- Edit participants: Opens a dialog that allows to edit the participant's master data and report allocations.

- Feedbacks: Detailed overview on all feedback constellations the participant is allocated to.

- Assigned reports: Overview on all reports intended for this participant.

- Delete participants: This action deletes the selected participant from participant administration. Please note: Deleting participants also irrevocably deletes all data belonging to these participants, including existing feedbacks.

The following actions can be applied to one or several participants:

- Send mail / invite: Using this action, you can send invitation mails to the selected participants. You can customize the template for an invitation mail. Other options for contacting the respondents are introduced in "EFS Survey", Chapter 11.2.15.

- Restore initial password: The initial password is restored. The initial password is visible to authorized users inside the admin area (ACL right: view_loft_passwd).

- Bulk edit: This action allows you to modify several participant records in a single step. See "EFS Survey", Chapter 11.2.10.

- Generate new password: A new password is generated.

- Delete: This action deletes the selected participants from participant administration. Please note: Deleting participants also irrevocably deletes all data belonging to these participants, including existing feedbacks.

5.2.2 Checking the Composition of the Participant Pool

The features on the **Statistics** tab allow differentiated monitoring and analysis of the participant pool's composition.

5.3 Waves

Waves allow to run a feedback process in staggered intervals. Therefore, a multi-source feedback will always have at least one wave to which the focus persons and their feedbacks are allocated. Usually, the focus persons are known at the start of the project. Depending on the planned process, the feedback providers are either known initially, too, or the focus persons select them during the process.

The wave overview, which is automatically opened when accessing the participant administration, lists all existing waves. Each wave contains an overview of the allocated focus persons. And via the focus persons, you can access lists of their feedback providers.

5.3.1 Administrating Waves

The wave overview lists the following information:

- Name of the wave: Click on the name to access the focus persons overview.

- Max. process status

- Focus persons: Number of focus persons.

- Feedback participants: Sum of participations in this feedback. Please mind: Participants who contribute to several feedback constellations are counted several times.

- Return rate: Current return rate

- Field start, field end

- End of process

- Activity status: Waves need to be activated explicitly.

The following actions are available for administrating waves:

- Edit wave: The dialog for editing wave properties is opened.

- Archive wave: The wave is moved to the archive (Chapter *5.3.2, p. 32*).

- Delete wave: The wave is removed irrevocably with all its content.

The following actions can be applied to one or several waves:

- Invite / Remind: You can invite or remind all feedback providers of the selected waves or restrict further e.g. to a specific role.

- Reset and delete data: The complete wave will be reset. The feedback providers' disposition codes will be reset to 11 = "not yet invited" or 12 = "active" (11: feedback providers who have not been invited yet; 12: feedback providers who have already received an invitation mail). Already collected result data of the feedback providers will be *deleted*. Feedback providers who have already taken part in the survey may participate again. See "EFS Survey", Table 11.5.

- Reset without deleting data: The disposition codes of all feedback providers in the wave will be reset as described above. However, the already collected result data will *not* be deleted. See "EFS Survey", Table 11.5.

- Export return rate

- Change wave status: The status of the wave can be changed.

> Instead of triggering the status changes manually, you can specify them beforehand. See Chapter *5.6.2, p. 35*

5.3.2 Archiving Waves

To move a wave to the archive, just click on **Archive wave**. Then, the waves are removed from the wave overview and listed on the **Wave archive** tab instead. Archived waves can be revived with a click on **Recover wave**.

5.4 Focus Persons

In the focus persons overview, you can find the following information for each feedback constellation:

- Login status

- For each focus person, the following is listed:
    - Name, First name
    - Personnel number
    - E-mail
    - Organizational unit
    - Gender
    - Language version

- Feedback phase

- Report status

- Overview on the feedback providers' role distribution and the current return per role (e.g. „DR 1/2" = direct reports: 1 completed feedback, 2 assigned feedback providers assigned).

As usual, **View** allows to modify the display and extended search allows to specify complex search criteria.

The following actions are available for *administrating the focus persons*:

- Edit focus person: The dialog for editing master and process data is opened.

- Delete focus person: The complete feedback constellation is removed irrevocably.

The following actions can be applied to one or several feedback constellations by ticking the focus person and then selecting the action from the drop-down list:

- Invite / Remind: You can invite or remind all feedback providers of the selected focus persons or restrict further e.g. to a specific role.

- Reset and delete data: The complete feedback constellation will be reset. The feedback providers' disposition codes will be reset to 11 = "not yet invited" or 12 = "active" (11: feedback providers who have not been invited yet; 12: feedback providers who have already received an invitation mail). Already collected result data of the feedback providers will be *deleted*. Feedback providers who have already taken part may participate again. See "EFS Survey", Table 11.5.

- Reset without deleting data: The feedback providers' disposition codes will be reset as described above. However, the already collected result data will *not* be deleted. See "EFS Survey", Table 11.5.

- Disposition code 15: If invitation mails are bounced, you can set the corresponding feedback providers to disposition code 15. These feedback providers will be except from all future mailings. See "EFS Survey", Table 11.5.

- Export return rate

- Change focus person to: The status of the feedback constellation can be changed.

5.5 Feedback Providers

In the feedback providers overview, you can find the following information for each feedback provider:

- Name, First name

- Personnel number

- E-mail

- Organizational unit

- Gender

- Role in the current feedback constellation

- Language version

- Dispositionscode

- Code

As usual, **View** allows to modify the display and extended search allows to specify complex search criteria.

The following actions are available for *administrating the feedback providers*:

- Preview: Questionnaire.

- Edit feedback provider: The dialog for editing master and process data is opened.

- Delete feedback provider: The complete feedback constellation is removed irrevocably. Please mind: The focus person of the current feedback constellation cannot be deleted.

The following actions can be applied to one or several feedback providers:

- Invite / Remind: see above.

- Reset and delete data / Reset without deleting data: see above.

- Disposition code 15: see above.

- Assign new code: a new access code is generated.

5.6 Defining Feedback Participants and Constellations Manually

Optionally, you can specify the participant data and feedback constellations for a wave either manually, or by import, or you can allow the focus persons to select appropriate feedback providers. If you know the constellations at the start of the feedback process, you will usually import them. If the constellations are now known yet, you can either simply upload the data into the participant pool, or you can import the focus persons directly into the wave, while other participants are uploaded into the participant pool.

This chapter explains how to specify the feedback constellations manually. In the following, the import process is introduced (Chapter *5.7, p. 38*). In a real project, you'd usually import the data. But to understand how the process works, it is helpful to work manually step by step first.

5.6.1 Creating a Wave

First of all, a wave must be created.

1. Open the **Participant administration** menu. The submenu **Waves** is opened automatically.
2. Click the **Add wave** button.

Figure 5.1 Adding wave

3. The properties dialog for waves is opened.

   – Name: Name of the wave

   – Field start, Field end: In this interval, the feedback providers of this wave can open the feedback questionnaire. The field time of the waves may differ from the project field time specified in the **Survey menu** (Chapter *6.1, p. 47*).

   – End of process: The date after which it will not be possible anymore to access reports for this wave.

   – Active: yes/no

– Peergroup: Individual peergroups can be created based on concluded previous feedbacks (**Process configuration** ->**Report definition** ->**Peergroups**). Examples for peergroups are: Wave of the previous year or focus person in similar position.

Add Wave (Project: Leadership Feedback)

Back to Wave overview

Create wave:
The use of waves enables you to group participants and to let various feedback groups run through the multi source feedback process in different time intervals. A wave is characterized by the following properties: **field time**, **process end** (last possibility to access the system) and optionally **peer groups** .

Name	Top management
Field start	🗓 2014-07-16 ▾ ⏲ 11:45:48 ▾
Field end	🗓 2014-07-30 ▾ ⏲ 23:59:59 ▾
End of process	🗓 2014-08-13 ▾ ⏲ 23:59:59 ▾
Active	Yes ▾
Peergroup	--- Please select --- ▾
	Add Wave

Figure 5.2   Specifying wave properties

4. Confirm with **Add wave**.

5.6.2 Specifying Automated Status Changes

A status change for the participants of a specific wave at a given date can be specified beforehand. See Chapter *3.4.5, p. 25*.

5.6.3 Creating Focus Persons and Feedback Providers

Creating focus persons

1. Return to the menu **Participant administration**->**Wave**.
2. Click on the title of the desired wave.

Figure 5.3   Opening wave

3.   The focus persons overview is opened.

Figure 5.4   Focus persons overview

4.   Click on **Add focus person**.

Figure 5.5 Creating a focus person

5. Enter the master data. If the focus person has been registered in the system earlier, e.g. because all participant data have been uploaded to participant pool, you can find them with the magnifying glass and insert the data with a click on **Add participants**.

6. If necessary, you can furthermore specify process data for the current feedback.

7. Confirm with **Add focus person**. The focus person is created and displayed in the overview.

Creating feedback providers

8. In the overview, click, on the name of the desired focus person.

Figure 5.6 Opening the feedback provider overview

9. The selected focus person's feedback provider overview is opened. At the current stage, it contains only the focus person in the „self-assessment" role.

Figure 5.7 Feedback provider overview

10. To create the first additional feedback provider, click on **Add feedback provider**.

11. Enter the master data. If the feedback provider has been registered in the system earlier, e.g. because all participant data have been uploaded to participant pool, you can find them with the magnifying glass and insert the data with a click on **Add participants**.
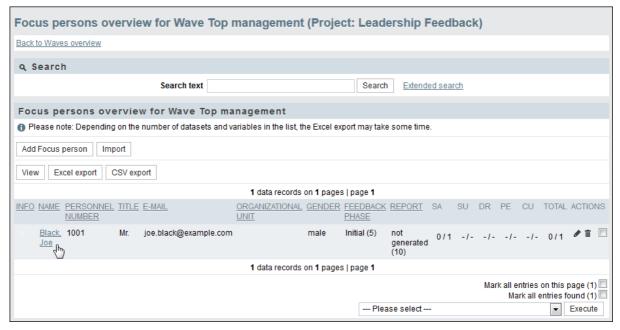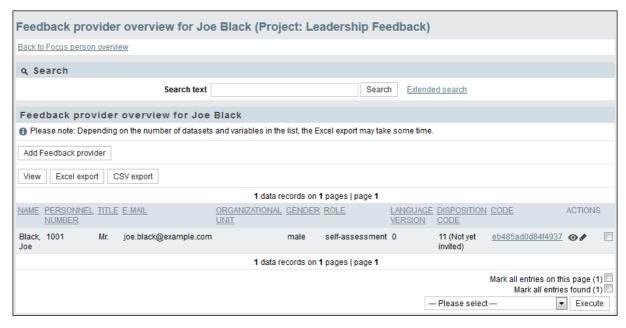
12. If necessary, you can furthermore specify process data for the current feedback.

13. Confirm with **Add participant**. The feedback provider is created and displayed in the overview.

14. Repeat the process for all feedback providers of the current feedbacl constellation.

5.7 Defining Feedback Constellations By Import

Usually, you will not create the individual participants of your project manually but rather import the list of participants.

Before you start

Please note:

- Do not start preparing the import until you have created all the required participant variables according to the instructions in Chapter *2.4, p. 15*.

- When using Excel, consider the following restrictions imposed by manufacturer specifications:

  – Only the first sheet of the file will be processed. You should not exceed the maximum of 256 columns and 65,000 rows. Should you require more columns or rows, select a different program and save your import file in CSV format.

  – Excel import is only possible for files created or saved using Excel 97+. Excel files that were created or saved using "Excel for Mac", "Neo Office" or "Numbers", for example, cannot be imported.

  – The file format XLSX, newly introduced by Microsoft with Office 2007, is not supported by EFS. Please save your files as XLS files before starting the import process.

5.7.1 Creating the Participant List

Create a list of the feedbacks including all persons involved and their roles in Excel.

To simplify this process, a dedicated import template can be downloaded in the import dialog (see Chapter *5.7.2, p. 40*).

In any case, the content should be formatted as follows:

- We recommend entering the respective column labels in the first row.

- Below, for each individual feedback constellation, list the respective participants and their attributes.

> The same person may appear in a single feedback in several roles or multiple times in various feedbacksk. The allocation is handled via the attributes "link ID" (u_link_id) and "role" (u_role).

- Link ID, role, personnel number and e-mail address are compulsory:

    - Link ID (u_link_id): This is an unambiguous identifier of the individual feedback. The feedbacks can be numbered consecutively, for example, or the personnel number of the focus person can be used to identify the feedback.

    - Role (u_role): See Chapter *3.3, p. 19*.

    - Personnel number (u_account): Unambiguous identifier of the participant. Eindeutige Kennziffer, über die der Teilnehmer identifiziert wird. Wird in der Spalte „u_account" gespeichert.

    - E-Mail-Adresse (u_email): Needed for inviting the participants.

- Furthermore, you can enter title, first name, name, organizational unit, gender, initial password, language version and user-defined master and process data.
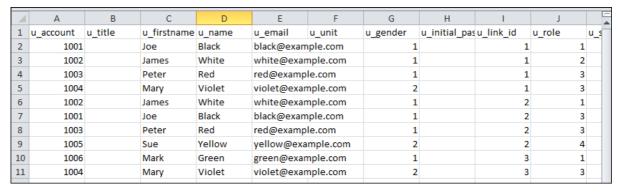
	A	B	C	D	E	F	G	H	I	J	
1	u_account	u_title	u_firstname	u_name	u_email	u_unit	u_gender	u_initial_pas	u_link_id	u_role	u_g
2	1001		Joe	Black	black@example.com		1		1	1	
3	1002		James	White	white@example.com		1		1	2	
4	1003		Peter	Red	red@example.com		1		1	3	
5	1004		Mary	Violet	violet@example.com		2		1	3	
6	1002		James	White	white@example.com		1		2	1	
7	1001		Joe	Black	black@example.com		1		2	3	
8	1003		Peter	Red	red@example.com		1		2	3	
9	1005		Sue	Yellow	yellow@example.com		2		2	4	
10	1006		Mark	Green	green@example.com		1		3	1	
11	1004		Mary	Violet	violet@example.com		2		3	3	

Figure 5.8   Participant list in Excel

Save the file in XLS or CSV.

> CSV (Character Separated Values) is an exchange format that is mainly used for exchanging data between different computer programs. CSV files can be created either with simple text editors or with spreadsheet calculation programs as e.g. Excel or OpenOffice Calc. To save an Excel file in CSV format, use **File**-> **Save**-> File type CSV.

5.7.2   Importing Participant List

1. Open the **Participant administration** and click on the wave's title.

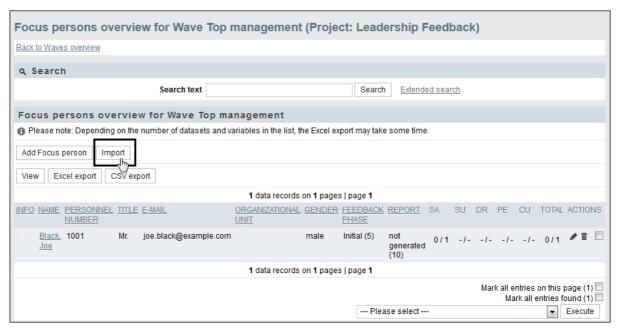2. The focus persons overview is opened. Click on the **Import** button.

Figure 5.9   Opening the import dialog

3. Select **Download import template** and save the file locally.

Figure 5.10   Downloading the import template

4. Enter your data as described above and save them.

5. Select the completed file.

6. Select the appropriate character set.

7. Activate "First row includes column label".

8. Use **Send file** to upload the list.

9. In the next step, the columns of the import file are allocated to the database fields. On the left hand of the form, you can see the fields of the participant administration. On the right hand, you can find the columns of the import file. Check the allocation. Repeat the procedure on the second tab **Process data**.
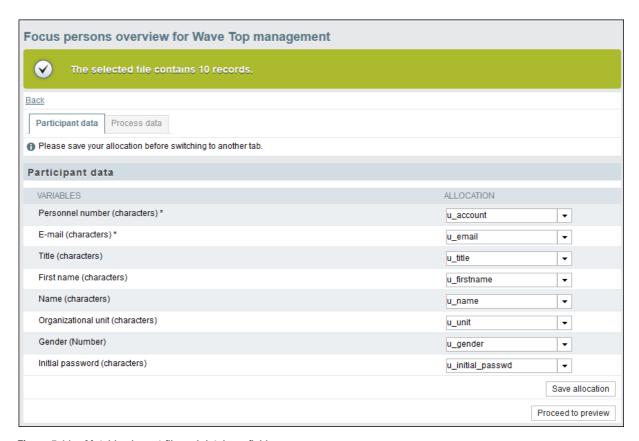
Figure 5.11 Matching import file and database fields

10. Click on **Proceed to preview**.

Figure 5.12 Preview

11. Check and confirm with **Import**.

12. A success message confirms that the data have been imported.

13. In the focus persons overview, you can see the focus persons of the imported feedbacks.

Figure 5.13   Focus persons overview

14. If you click on a focus person, the overview of that person's feedback providers is opened.

Figure 5.14   Feedback providers overview

15. In the participant pool, you can find all participants of the wave.

Figure 5.15   Participant pool

5.8   Allowing Focus Persons to Select Their Feedback Providers

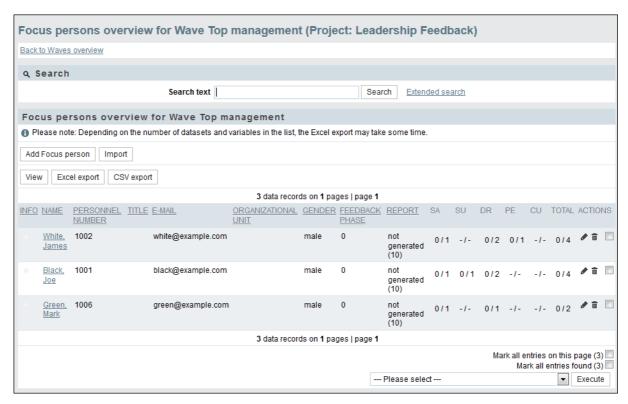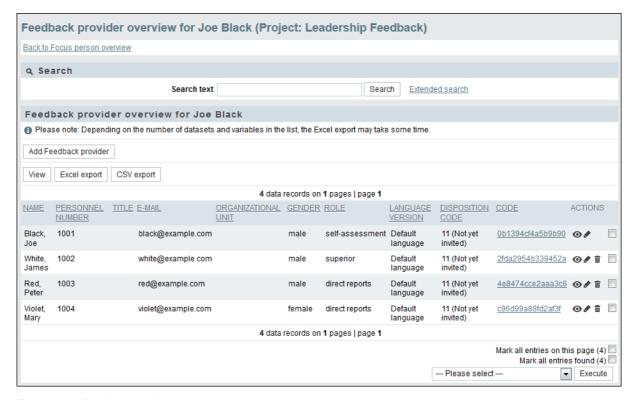This scenario is realized optionally on project base. It needs special programming.

5.9   Activating Validation of the Selected Focus Providers

This scenario is realized optionally on project base. It needs special programming.

If the feedback constellations are specified by the focus persons, a validation by the focus person's superior can be activated optionally.

To activate the feature and to specify the notification mail, please proceed as follows:

1. Create a mail template of type "Default mail" as described in Chapter *5.10.2, p. 45*.

2. In the menu **Process configuration**->**Feedback center** in the section "Approval of feedback providers by the manager", activate the checkbox "Validation process active".

3. In the drop-down list "Mail template", select the appropriate template and **Save**.

5.10 Sending E-mails in Feedback Processes

During the feedback process, you may have to contact all participants, sometimes you will contact specific selected persons. Other e-mails are dispatched semi-automatically if e.g. a focus person has forgotten the feedback center password.

- In general, the invitation processes are based on the well-known functionalities of EFS Survey participant administration ("EFS Survey", Chapter 11.2).

- For the following topics, you can find MSF-specific explanations below:

  – how to personalize e-mails

  – how to prepare mail templates

  – how to link mail templates with semi-automatic features. Resetting of passwords (Chapter *5.10.3, p. 46*) and requests to validate a list of feedback providers (Chapter *5.9, p. 43*) are quite typical situations for semi-automatic dispatch.

"EFS Survey", Chapter 12 provides detailed information on mail dispatch in EFS.

5.10.1 Personalizing E-mails

You can use wildcards to personalize e-mails and mail templates.

- The wildcards listed in Table *5.1* allow to insert master and process data of the mail recipient. These wildcards are supported in the questionnaire, too.

- The wildcards listed in Table *5.2* allow to insert master and process data of the focus person in the current feedback constellation. These wildcards are supported in the questionnaire, too.

- Only supported in mails: The wildcards listed in Table *5.3* allow to insert information on the current feedback wave.

- If you click on the **Question mark** icon above the mail text field in the mail form, a context-dependent overview is opened.

Wildcard	Meaning
#u_account#	Personnel number
#u_title#	Title
#u_firstname#	First name
#u_name#	Name
#u_email#	E-mail
#u_unit#	Organizational unit
#u_gender#	Gender
#u_role#	Role
#u_stats#	Feedback status
#u_language#	Language version

Table 5.1   Participant

Wildcard	Meaning
#fb_recv_u_account#	Personnel number
#fb_recv_u_title#	Title
#fb_recv_u_firstname#	First name
#fb_recv_u_name#	Name
#fb_recv_u_email#	E-mail
#fb_recv_u_unit#	Organizational unit
#fb_recv_u_gender#	Gender
#fb_recv_u_role#	Role
#fb_recv_u_stats#	Feedback status
#fb_recv_u_language#	Language version

Table 5.2   Focus person of the current feedback constellation

Wildcard	Meaning
#wave_active#	Wave active
#wave_end_date#	Field start
#wave_gid#	Wave ID
#wave_gname#	Name
#wave_peergroup#	Peer group
#wave_process_end#	End date
#wave_start_date#	Field start
#wave_status#	Status of the wave

Table 5.3   Only e-mail: Wave

5.10.2 Preparing Mail Templates

Usually, when writing e-mails in EFS, you will use pre-defined mail templates. These templates are centrally created, edited and managed in the **Libraries**->**Mail templates** menu.

If you need a new mail template, open the **Libraries**->**Mail templates** menu and click on **Create template**. Specify all necessary settings, select the appropriate mail sender and enter the content. Please mind:

- Use meaningful titles for your mail templates, to ensure that everybody understands which template fits for which situation.

- Make sure that the mail template type fits for your purpose. For invitations, for example, templates of type "Invitation mail" should be used. For an overview of suitable template types, check Chapter *8.1, p. 52*.

- An appropriate sender address should be specified beforehand according to the instructions in "EFS Survey", Chapter 12.4, and selected for the template. This is of particular importance if, for example, e-mails for resetting passwords are to be sent from an address which is not yours, e.g. a general mail box to which other project team members have access.

- Make sure that all necessary wildcards are inserted properly. You can find an overview on all available wildcards in the mail form below the **Question mark** icon.

  – In multi-source feedbacks, a dedicated set of wildcards is available for constellation-specific information. You can find an overview in Chapter *5.10.1, p. 44*.

  – Use the wildcard #code_complete# to insert an access link, i.e. the URL of the questionnaire with access code.

  – The feedback center URL can be found in the **Process configuration**-> **Feedback center** menu on all tabs. It consists of the questionnaire URL and the appendix /loft.php, e.g.

  ```
  https://questback.qb-feedback.com/uc/main/a437/loft.php
  ```

"EFS Survey", Chapter 12.3 provides detailed information on mail templates.

5.10.3 Configuring "Reset Password" Mails

If participants have forgotten their password and cannot log in to the feedback center, they can trigger a „Reset password" mail. It contains a link for resetting the password.

To configure this feature, please proceed as follows:

- Create a mail template of the type "Password-Recovery-Mail"

- Ensure that the template contains the wildcard #password_recovery_url#: It is filled with the reset link.

- In the **Process configuration**->**Settings** menu in the field "Mail template", select the new mail template and **Save**.

6 Testing and Activating the Project

6.1 Activating the Project

Before starting the feedback process, the basic settings of the project have to be adjusted in the **Survey menu**.

1. Specify beginning and end of the project. Confirm with **Save**.
2. In the "Status" line, you can see that the project has been created and is currently in the status "survey compiled". But it is not activate yet ("in the field"). Click on the **active** button: the status will change to "active".
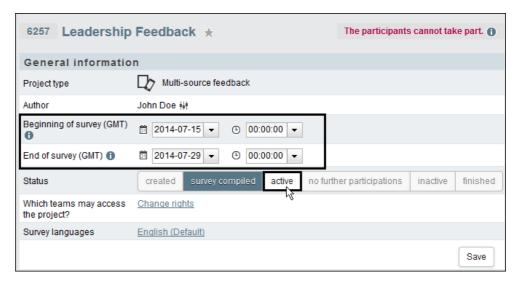

Figure 6.1   Specifying the project field time and activating the project

> The interval specified in the survey menu is the field time of the project itself. Individual feedback waves may have shorter field times, but these must be inside the overall project field time.

6.2 Testing the Project

Before entering into the field, you have to test questionnaire and feedback center.

*   You have repeatedly used the preview while creating the questionnaire to check completed questions or pages. After completion, the whole questionnaire needs to be tested.

*   As the preview does not support all features, you should test the questionnaire in the productive mode, too, before publishing it. For this purpose, a test wave with participants is used.

*   With a test wave and test participants, you can test the feedback center, too.

6.2.1 Testing the Questionnaire in Preview Mode

In the "Distribution" section of the survey menu, click on the **Questionnaire preview** icon and check the survey from the point of view of a participant. Go through the

questionnaire and try whether filters, hiding conditions and plausibility checks really work.

6.2.2 Testing Questionnaire and Feedback Center with Test Participants

A test wave and test participants allow to test all features of questionnaire and feedback center under real-live conditions.

1. Create a test wave in the menu **Participant administration**->**Waves** (Chapter *5.3, p. 31*.

2. Create participants manually and define a feedback constellation (Chapter *5.6, p. 34*). Alternatively, you can import a list of test participants into the test wave (Chapter *5.7, p. 38*). *Please take care to use only e-mail addresses for the test participants which you can access and which you are permitted to use for e-mail tests!*

3. To access the questionnaire from the perspective of a feedback provider, please proceed as follows:

    –   Open the feedback provider overview: **Participant administration**-> {**Selected wave**}-> {**Selected focus person**}.

    –   For the desired test feedback provider, click on the code link in the "Code" column.

    –   The questionnaire is opened and you can now check wildcard replacement, routing etc. from the test feedback provider's perspective.

4. To access the feedback center from the perspective of a focus person, please proceed as follows:

    –   Open the focus persons overview: **Participant administration**-> {**Selected wave**}.

    –   For the desired test focus person, click on the **Edit focus person** icon.

    –   In a second browser window, open the menu **Process configuration**-> **Feedback center**. Click on the feedback center URL: the login will be opened.

    –   Copy e-mail address and initial password of the test person into the login form (right mouse button->**Copy** or Strg+C).

    –   You can now check the feedback center from the test focus person's perspective.

Based on the test wave, you can thus check the complete feedback process from all possible participant perspectives and in all possible feedback phases. E.g. you can check how feedback center functionalities change depending on the feedback status. Or you can invite test particiapnts to test the wildcard replacement in e-mails.

If you have completed all tests, go to the menu **Participant administration** and remove the test wave by clicking on the icon **Delete wave** in the "Actions" column. Then, please delete all remaining test persons from the **Participant pool**.

6.3 Resetting the Project

All data created e.g. by tests in productive mode must be deleted before the start of the feedback process. Go to the menu **Test and validation**->**Reset survey**. Select "...reset survey completely..." and click on **Reset survey**. Now the database is cleaned and all test data deleted.
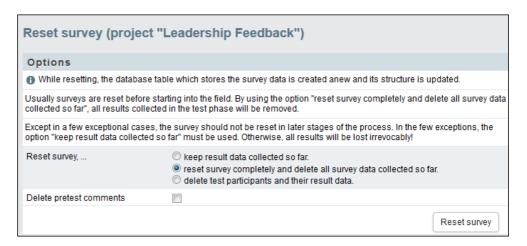
Figure 6.2   Resetting the survey

If you have created superfluous questions, pages or answer options, please delete them *before* resetting the survey and inviting participants.

If you delete pages, questions or answer options or change codes in a live survey, already stored information will be lost or it will no longer be possible to interpret it correctly. Filters and other features that reference variables and codes might be damaged, as well. Please do the clean-up before launching the survey, then reset and check again if all questionnaire features are working properly.

7 Exporting Results

EFS includes a variety of export features which allow to download participant data, results and other information for analysis and presentations.

This Chapter covers export features which allow you to download MSF-specific data (provided you have the necessary access rights).

- Participant data

- Return statistics

- Results with and without participant data

For detailed information on the export features of EFS, please see "EFS Survey", Chapter 14.

7.1 Exporting Participant Data

An export of participant data may be necessary if, for example, the same participants are to be invited to a follow-up project, or if someone without access to the EFS admin area needs to check and update the data.

Two exports are dedicated to participant data:

- Participant data of the whole participant pool: **Participant administration**-> **Participant pool**->**Excel export** / **CSV export**

- Participants of an individual wave: **Participant administration**->{**Selected wave**} ->**Excel export** / **CSV export**

7.2 Exporting Return Statistics

To download the return rates of one or several waves, go to the menu **Participant administration**->**Waves**, mark the desired wave(s), select "Export return rate" in the drop-down list and click on **Execute**.

7.3 Exporting Results

In addition to the usual EFS result exports, two dedicated MSF-specific result exports are available.

- MSF participant export with result data:
  - The familiar EFS Survey result data ("EFS Survey", Table 14.8), the feedback identifier (u_link_id), all master data and some selected process data.
  - Requires read rights to "loft_export_combined".

- MSF export with anonymous result data:
  - The familiar EFS Survey result data ("EFS Survey", Table 14.8), the feedback identifier (u_link_id), and merely the process data feedback role (role) and wave (u_group).

– Requires read rights to "loft_export_anonym".

– Requires read rights to "loft_export_anonym".

8 Appendix

8.1 Access Control for Multi-Source Feedbacks

The following table lists all MSF-spezific ACL rights.

Detailed information on the EFS rights system can be found in "EFS Survey", Chapter 17.

Right	Read	Write
access_restrictions		With write permission, you can access the **Access restrictions** tab.
leadership_report_manager_download	With read permission, you can download reports on the **Report manager** tab.	
loftpartadm	With read permission, you can view the participant list in multi-source feedbacks.	With write permission, you can edit the participant list in multi-source feedbacks.
loft_detail_view	With read permission, you can access the statistics of current and completed feedback processes. It shows for each process how many respondents are involved.	
loft_export_anonym	With read permissions, you can export anonymous result data in multi-source feedbacks.	
loft_export_combined	With read permissions, you can export address and result data in multi-source feedbacks.	
loft_fbcenter	With read permission, you can change the type of the external view.	
loft_peergroups	With read permissions, you can edit peergroups.	
loft_report_extern	With read permission, you can open the **Report definition** menu and edit external reports.	
loft_report_intern	With read permission, you can open the **Report definition** menu and edit system-generated reports.	
report_360_dl	With read permission, you can download reports in multi-source feedbacks.	
view_loft_passwd	With read permission, you can view passwords in the participant administration of multi-source feedbacks.	

Table 8.1   Rights related to multi-source feedbacks

8.2 Mail Template Types

When selecting mail templates via the EFS mail forms, only those templates will be available that are appropriate to your current operation. For example, if you are inviting participants, only templates for invitation mails will be offered for selection. This is controlled by assigning the templates to certain mail template types. The following table provides an overview of those types which are used in multi-source feedbacks and their respective applications.

> For an overview on all mail template types of EFS, please see "EFS Survey", Table 12.5.

Mail template type	When it is used
Default mail	Is available in all non-automated dispatch processes.
Invitation mail	Used to invite participants to provide feedback.
Reminder mail	Used to remind participants of feedbacks they have not completed yet.
Notification before end of survey	Used to notify EFS admin area users of the upcoming end of their survey. • This notification may be requested in the dialog used to create and change projects. • If users have requested the notification in a given project, but no mail template has been selected (e.g. because the users do not have sufficient rights), they will receive a mail with default text.
Notification by exchange platform	Only on installations with EFS Secure Exchange activated: Mail template used to notify project staff of changes on the exchange platform. For more information on the optionally available platform refer to the special documentation "EFS Secure Exchange".

Table 8.2   Mail template types

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