

echospan

EchoSpan, Inc.

Employee Engagement Tool

Product Guide



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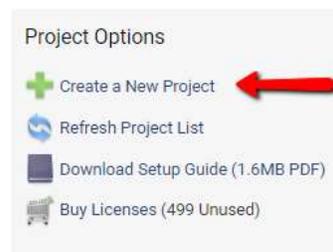
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Project Setup

Create a New Project

In this section, you will review a few project basics such as how to create a new project, edit the name of your project, and identify contact info and important dates for your project.

From the Feedback Projects tab, click **“Create a New Project”**. This icon can be found on the right-hand side of your screen under **Project Options**.



This next screen prompts you to enter your unique Project Name and Description, as well as choose who the Administrator/main point of contact for email communications will be. Make sure to select **Employee/Engagement Survey** as your project type. For the project source, you can choose to start with a Blank Project or Duplicate an Existing Project. Click **“Create Project”**.

Create a New Feedback Project

Project Name	Enter a unique name for this feedback project. <input type="text" value="Employee Engagement Survey"/>
Project Type	<input type="radio"/> 360-Degree Feedback <input checked="" type="radio"/> Employee/Engagement Survey (Initial Beta Release)
Description	Enter a brief description of this feedback project (optional, maximum 2,000 characters). <div style="border: 1px solid #ccc; height: 80px;"></div>
Administrator	Select the administrative contact for this project. <input type="text" value="Doe, John"/>
Content Source	<input checked="" type="radio"/> Blank Project <input type="radio"/> Duplicate Project <input type="radio"/> EchoSpan Templates <input type="radio"/> Content Network NEW!

Optional: Once you have your new project created, you can verify the point of contact, important dates, and review features for the project.

1. From the **Setup** menu, select **Project Settings**.
2. Review the Project Basics and edit or populate fields related to your project.
3. Review the default Review Features that are enabled for your project.
4. Click **"Save Changes"** at the bottom right corner.

Project Basics

Project Name	<input type="text" value="Employee Engagement Survey"/>
Creation Date (read-only)	<input type="text" value="3/18/2020"/>
Expected End Date (will not close project automatically)	<input type="text"/>
Contact Name (email "From" name)	<input type="text" value="John Doe"/>
Contact Email (email "Reply-to" address)	<input type="text" value="test@echospan.com"/>
Project Administrator Name (shown in tool)	<input type="text" value="John Doe"/>
Sender Email (read-only)	<input type="text" value="sender@echospan.com"/>
Survey Administrator Password	<input type="password"/>
Report Footer	<input type="text"/>
Project Description	<input type="text"/>

Review Features

Feedback Writing Assistant

- ON:** Feedback Assistant is available to users (Default)
- OFF:** Feedback Assistant is NOT available to users

Question Validation Master Switch

- ON:** Require a response to selected survey items (Default)
- OFF:** Do not require a response to selected survey items

Administrator Email Queuing

- Real-time:** Email Invitations are sent as the administrator enter Targets/Raters
- Queued:** Email invitations are queued for the administrator to send later (Default)

As you go through the rest of the process to set up your project, you can reference the Quick Setup Checklist (screen shot below) from the **Home** menu option.

Project Dashboard: Employee Engagement Survey

Quick Setup Checklist

Welcome to your new survey project! Please follow the steps below to configure your project. Once you have completed these steps, click here to hide this checklist.

Step 1. Setup competencies and items Setup Items
 In this step, you'll select or create the items and competencies you want rated in this project.

Step 2. Define a rating scale Edit Rating Scale
 In order to collect responses for the items you defined in Step 1, you need a rating scale. In this step, you'll pick one from our library or define your own.

Step 3. Confirm or edit Rater relationship groups Edit Relationships
 Each participant (Rater) in this survey project is assigned a relationship group for segmentation of responses. Common relationship groups for engagement surveys include Executives, Managers and Individual Contributors. Here, you'll enter the specific relationship groups you want to use, or, confirm use of our default groups.

Step 4. Customize email message templates Edit Email Templates
 This step will let you customize the wording of the email invitations and reminders sent to your review participants. To ensure email delivery, please make sure that the echospan.com domain is white-listed by your email administrator or in-house IT department.

Step 5. Enter or Upload Raters
 In this step, you'll enter or import the participants (Raters) in this project. To enter Raters for this survey, click the name of the Survey Target that was automatically created below to be taken to the Target's profile page. There, you can enter Raters one-at-a-time, or, upload them from Excel.

Quick Setup Checklist: Step 1 - Setup Competencies and Items

In this section, you will select or create the competencies and items you want responses for in this project.

Step 1:

1. From the **Setup** menu, select **Review Items**.
2. Select "Delete Competency" next to the Sample Category placed in your review as an example.
3. Click "Ok" to confirm you want to delete the Sample Category.

Home » Review Items

Manage Review Content

- + Add New Review Item
- + Add New Competency
- Competency Library
- Save Item Order

Sample Category New Item | Properties | Delete Competency | Preview

Question/Item	Type	Respondents	Required?
<input type="checkbox"/> This category/competency is empty			

Select "Delete Competency" to delete the Sample Category from your project.

Step 2:

Add your engagement survey content to your project.

1. Click the **"Add New Competency"** option under the Manager Review Content menu on the left. Here you will be able to add competencies one at a time, or multiple competencies all at once.
2. Type in your Competency names, separating each new competency by a line break OR copy and paste the list of competencies from a Word or Excel document.
3. Select the box to the left of **"Include an open-ended comment item"** if you want to include a comment section for each competency that you add.
4. Click **"Submit"**

Home » Review Items

Manage Review Content

- + Add New Review Item
- + Add New Competency
- Competency Library
- Save Item Order
- Delete Selected
- Select/Deselect All

Modify Selected Items

Enter new competencies/review sections:

Competency 1
Competency 2
Competency 3

Separate multiple competencies with a line break.

Include an open-ended comment item

Cancel Submit

Annotations:

- Red box: "Add multiple competencies at once using a separate line for each competency/review section." (points to the competency list)
- Red box: "Select here if you want to include Comment sections." (points to the checkbox)

5. Next, click the **"New Item"** link to the right of the competency name and type in or copy and paste your item content into the text box, then edit the item settings as needed. You will also be able to choose the item type and whether or not the item is required.

Home » Review Items

Manage Review Content

- + Add New Review Item
- + Add New Competency
- Competency Library
- Save Item Order
- Delete Selected
- Select/Deselect All

Modify Selected Items

Competency 1 | New Item | Properties | Delete Competency | Preview

Question/Item

Comments

New review item

OR

Rated It...

N/A

No

Branching Rules | Advanced Options

Cancel Save Changes

Annotations:

- Red box: "Select 'New Item' to add individual items." (points to the 'New Item' link)
- Red box: "Select 'Add New Review Item' to add multiple items at once." (points to the 'Add New Review Item' button)
- Red box: "When adding individual items, choose item type and whether item is required." (points to the 'Rated It...' dropdown and the 'No' dropdown)

6. You can add multiple items to a competency at one time by clicking the **"Add New Review Item"** button under the Manager Review Content menu on the left. The items should be separated by a line-break if entered manually **OR** you can copy and paste them into the text box from a Word or Excel document. Make sure to select the Competency you want to add them to from the review section/competency drop-down box, select the item type, and choose whether you want the response to be required.

Home » Review Items

Manage Review Content

- [+ Add New Review Item](#)
- [+ Add New Competency](#)
- [Competency Library](#)
- [Save Item Order](#)
- [Delete Selected](#)
- [Select/Deselect All](#)
- [Modify Selected Items](#)

Other Options

- [Configure Rating Scale](#)
- [Export to Excel](#)
- [Reorder Competencies](#)
- [Estimate Completion Time](#)
- [Refresh Page](#)

Enter new review item(s):

Review item 1
Review item 2
Review item 3

Separate multiple items with a line break.

Place in review section/competency:

Sample Category

Select item type:

Rated item Page Note/Group Title
 Rated item (Reverse score) Multiple Choice (Drop-down box)
 Behavioral Anchor Item Multiple Choice (Radio buttons)
 Comment Box Pick Multiples (Check boxes)
 One-line Text Box

Select respondent group(s):

N/A

Require a response to these items?

No Yes

Cancel Submit

Step 3:

If you would like to segment your results by demographic you will need to create a demographic competency. The responses to the items in your demographic competency may be used to segment and filter the results that are included in your report output. These items should be added as a multiple choice radio or multiple choice pick from list item type.

Demographics				
New Item Properties Delete Competency Preview Copy to Library				
Question/Item	Type	Respondents	Required?	
<input type="checkbox"/> How long have you been with Sample Company?	Multi-Choice (Radio)	Everyone	No	+ -
<input type="checkbox"/> What is your gender?	Multi-Choice (Radio)	Everyone	No	+ -
<input type="checkbox"/> What location do you work from primarily?	Multi-Choice (Radio)	Everyone	No	+ -

Step 4:

Optional: Add competency descriptions and instructions.

1. Click the **"Properties"** link next to any competency name. There you will see the editable fields for descriptions and instructions. Make sure to **Save Changes**.

Competency 1 | New Item | **Properties** | Delete Competency | Preview

Category/Competency: Competency 1

Description: Your custom description here

Instructions: Your custom instructions here

ADVANCED PROPERTIES

Category Type: Scored (default) Comments Only Importance Ratings

Page Break After: Automatic (default) Force *Forces a page break in the Competency Summary report component*

Cancel Save Changes

Step 5:

Review the order of your review contents and save the item order.

1. Click and drag the item(s) into their new position using the up and down arrow icon.

Question/Item	Type	Respondents	Required?
<input type="checkbox"/> I can see myself working here in five years.	Rated Item	Everyone	No
<input type="checkbox"/> I have a clear understanding of my company's strategic goals.	Rated Item	Everyone	No
<input type="checkbox"/> I can easily see how my work affects the company's overall success.	Rated Item	Everyone	No
<input type="checkbox"/> I always know what is expected of me when it comes to my goals and objectives.	Rated Item	Everyone	No
<input type="checkbox"/> It feels like everyone is on the same team at my company.	Rated Item	Everyone	No

2. Click **“Save Item Order”** at the left of the page.
3. The new order will be reflected on the review response pages as well as standard reports.

Quick Setup Checklist: Step 2 - Define a Rating Scale

In order to collect responses for the rated items you defined in the last step, you need a rating scale. In this step, you will pick one from our library or define your own.

1. From the **Setup** menu, select **Rating Scale**.
2. View example rating scales by selecting the link **“View example scales”** and select an option if you wish to use one of these presets.
3. Edit the labels of the rating scale by clicking within the textbox.
4. Add a description of each label in the description textbox next to each label (optional).
5. Add a value to each label starting with **“0”**. Any value of **“0”** will be omitted from scoring (ex. Not applicable or Not Observed). Ratings should go in order from lowest to highest, with highest being the best.
6. If you need additional rating scale items, click **“Insert new rating scale item”**.
7. Delete a rating scale item by clicking **“Delete”** to the right of the item. (Scale items should NOT be deleted once responses exist.)
8. You can select how the scale will be displayed by choosing the radio button at the bottom of the pop-up.
9. Click **“Save & Close”**.

Quick Setup Checklist: Step 3 - Define Rater Relationship Groups

In an Engagement survey, relationship groups are defined as groups you establish to participate in the review process. In this step of the setup process you will enter the relationship groups you want to use, or, confirm use of our default groups. Results in the Employee Engagement Survey may be segmented by the relationship groups of your respondents, as well as their answers to the items in the demographic competency if you choose to include.

1. Choose the **Setup** menu option >> **Relationship Groups**.
2. By default, the tool will create three relationship groups for your survey, Executives, Manager, and Employees. Now you can choose to edit those groups or add additional groups in your project.
3. You can add more relationship groups by clicking "**Insert new relationship group**" at the top of the page. Please note the maximum number of relationship groups supported by a standard report is **seven**.

Configure Relationship Groups

Configure your relationship groups below. Click Save Changes to save your edits. Changes take effect immediately, so use care if your reviews are currently in progress. Please note that a **maximum of seven** rater groups are supported by standard reports. Fields in the Min and Max columns are only for targets to select their own Raters or when managers are nominating Raters for their employees. Learn the number of Raters that can be nominated for each relationship group within the user tool.

[+ Insert new relationship group](#)
[+ Reorder Groups](#)
[Help](#)

Relationship Group	Description (optional)	Min	Max	Color (Hex)	Options
Executives		3	10	- Auto -	Advanced... Delete
Managers		3	10	- Auto -	Advanced... Delete
Employees		3	10	- Auto -	Advanced... Delete

Save and Close

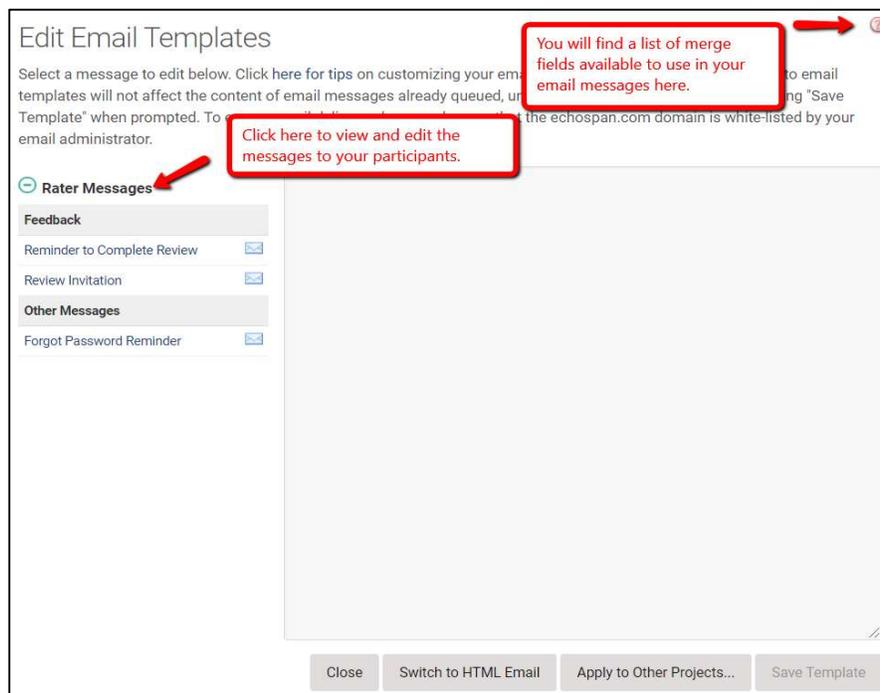
4. If you need to delete a relationship group, select "**Delete**" to the right of the relationship group. *****Relationship groups may NOT be deleted if responses exist for any raters within that group.**
5. Click "**Save and Close.**"

Quick Setup Checklist: Step 4 - Customize Email Message Templates

This step will let you customize the wording of the email invitations and reminders sent to your review participants. To ensure email delivery, please make sure that the echospan.com domain is white-listed by your email administrator or in-house IT department.

Confirm/ Edit email content

1. From the **Email** menu, select **Edit Email Templates**.
2. Click on the Rater messages option to choose the message you would like to edit. You can edit the wording of the template and/or copy and paste in your own content.
3. You will notice that there are words in double brackets in each template, ex. `[[targetname]]`. These are merge fields that are going to automatically customize each participant email based on the information in your account. If you would like to include additional custom fields, a list of them can be found by clicking on the red question mark in the top right corner of the email editing section. To embed login credentials for your participants you will need to include the `[[URL]]`, `[[username]]`, and the `[[raterid]]` merge fields in the Review Invitation email template.



4. Once Raters are added to your project, emails will be queued for them (by default) using the templates in the system at that time. If you make changes to the templates after the participants' invitations have been queued, the system will prompt you to re-queue your messages using the updated templates.

Edit the subject of any email

1. From the **Email** menu option, select **Edit Email Templates** and choose the template you want to edit.
2. Type "Subject:" followed by your subject on the first line of the email template.
Example - Subject: Your Subject Here

Edit Email Templates

Select a message to edit below. Click here for tips on customizing your email templates. Note that changes made to email templates will not affect the content of email messages already queued, unless you confirm the update after clicking "Save Template" when prompted. To ensure email delivery, please make sure that the echospan.com domain is white-listed by your email administrator.

Rater Messages

Feedback

- Reminder to Complete Review
- Review Invitation

Other Messages

- Forgot Password Reminder

Subject: Employee Engagement Survey

Dear **[[fname]]**,

...INSERT INFORMATION ABOUT THIS SURVEY FOR THE PARTICIPANT HERE...

To participate in this survey, click the link at the end of this email and enter the login credentials below. If you experience technical difficulty, please feel free to contact us at **[[adminemail]]**.

Email Address: **[[email]]**
 Invitation Code: **[[raterid]]**

Click here to begin the survey:

3. Click **"Save Template."**

Quick Setup Checklist: Step 5 - Enter Raters

In this step, you'll enter or import the individuals you want to participate in the review process.

RATERS: Raters are the individuals that provide feedback about the organization in Employee Engagement Reviews.

Option 1: Import Raters from an Excel spreadsheet.

1. From the Home page of your project, add the target/organization using the "Add a New Target" section.

Project Dashboard: Employee Survey

Quick Setup Checklist

Welcome to your new survey project! Please follow the steps below to configure your project. Once you have completed these steps, click here to hide this checklist.

- Step 1. Setup competencies and items**
 In this step, you'll select or create the items and competencies you want rated in this project. Setup Items
- Step 2. Define a rating scale**
 In order to collect responses for the items you defined in Step 1, you need a rating scale. In this step, you'll pick one from our library or define your own. Edit Rating Scale
- Step 3. Confirm or edit Rater relationship groups**
 Each participant (Rater) in this survey project is assigned a relationship group for segmentation of responses. Common relationship groups for engagement surveys include Executives, Managers and Individual Contributors. Here, you'll enter the specific relationship groups you want to use, or, confirm use of our default groups. Edit Relationships
- Step 4. Customize email message templates**
 This step will let you customize the wording of the email invitations and reminders sent to your review participants. To ensure email delivery, please make sure that the echospan.com domain is white-listed by your email administrator or in-house IT department. Edit Email Templates

Project Respondent Status

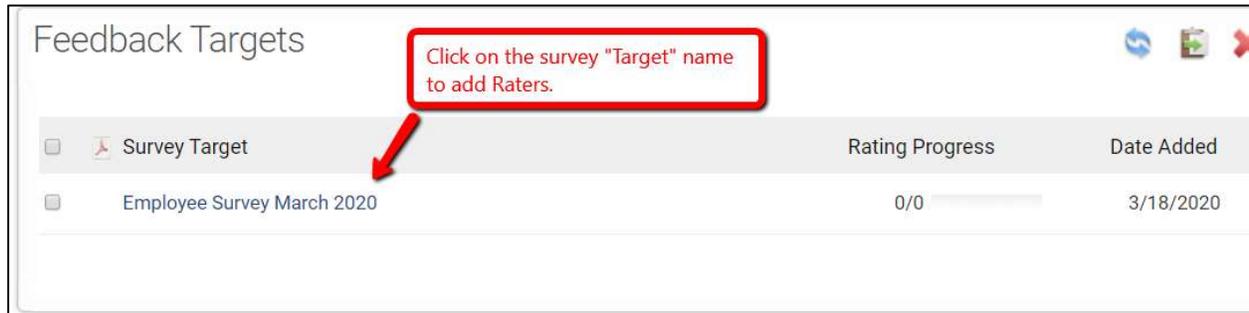
Needs Review	0
Approved	0
In Progress	0
Finished	0
Disabled	0
Opted Out	0
Declined	0

0 20 40 60 80 120

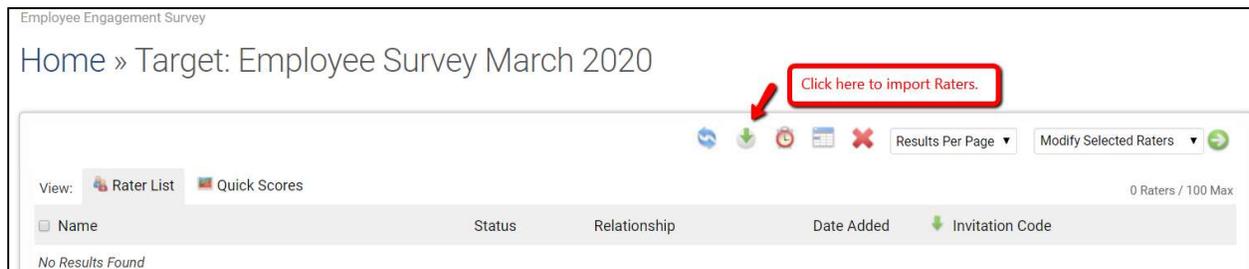
Add a New Target

A "Target" is the subject of feedback. In a general feedback survey, common examples include a team, workgroup or department. Enter a Target name below to add it to your project.

- Then, click on the Target name to open the target profile and add Raters.



- From the Target profile page click the icon, shown below, to import a list of Raters from an excel file.



- Download the Rater Import template in excel.
- Populate the spreadsheet and confirm your Excel fields (columns) are in the following order: Rater first name, Rater last name, Rater email, Rater relationship group, then Copy and paste your Excel data into the space provided.
- Select the "**Preview Upload**" button and confirm that your import fields are correct by looking at the Error Messages column. The system will verify that the relationship groups in your excel file are a direct match to the relationship groups that are set up in the project.
- Click "**Upload Selected Raters**" to import your list. Emails will be queued for all Raters upon completion of the import.

Option 2: Raters can also be added to a project one at a time.

- From the "Target's" profile page you will see the option to "**Add a Rater**".

Employee Engagement Survey

Home » Target: Employee Survey March 2020

View: Rater List Quick Scores

Results Per Page: [dropdown] Modify Selected Raters: [dropdown] [Add] [Remove] [Refresh] [Cancel] [Close]

Name	Status	Relationship	Date Added	Invitation
No Results Found				

Use this option to manually add Raters to a project.

Add a Rater

Select from List: -- Select --

First Name:

Last Name:

Email Address:

Relationship:

Send invitation email now
 Queue invitation email to send later
 Do not create an invitation email

Additional fields...

2. Fill in the required fields- First Name, Last Name, Email Address, and select their Relationship. Then choose whether you want the email invitations to route to a queue for review before sending, or send them immediately.
3. Click **“Submit.”**

Reviewing/Sending Emails:

The system will always queue messages by default. When messages have been queued, the administrator can decide to send a participants' email/invitation by following the steps below:

1. From the **Emails** menu, select **Queued Messages**.
2. You can preview the email by clicking the name of the recipient.
3. When viewing the Preview Email Message, please note the option to send yourself a test email.

Preview Email Message Close

To: Sally Sample (ss@echospan.com)

From/Reply To: John Doe (test@echospan.com)

Date Created: 3/18/2020

Date Sent: Message has not been sent.

Subject: Feedback Requested for Employee Survey March 2020

Message Body

Dear Sally,

...INSERT INFORMATION ABOUT THIS SURVEY FOR THE PARTICIPANT HERE...

To participate in this survey, click the link at the end of this email and enter the login credentials below. If you experience technical difficulty, please feel free to contact us at test@echospan.com.

Email Address: ss@echospan.com
 Invitation Code: RTpmp44W62

Click here to begin the survey:
<http://www.echospan.com/360surveys/EWAYS9SYCCS/start.asp?email=ss@echospan.com&id=>

Thank you for your time and feedback.

Sincerely,

John Doe

Test Message: Send to:

- You can choose to **Send ALL** messages or to just send the ones you have selected using the box next to each participants' name by choosing **Send SELECTED**.

Employee Engagement Survey

Home » Email Messages

Queued/Unsent Messages Results Per Page

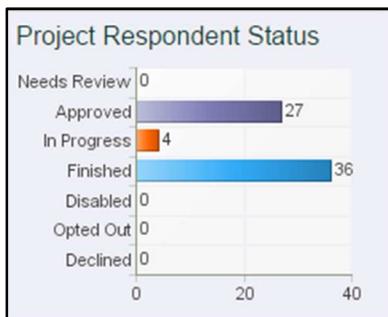
Show Queued/Unsent Messages
 Show Sent Messages

<input type="checkbox"/>	Recipient	Subject	Recipient Type	Message Type	Created	Sent
<input type="checkbox"/>	Jim Jones	Feedback Requested for Employee Survey March 2020	Rater	Review Invitation	3/18/2020	—
<input type="checkbox"/>	Sally Sample	Feedback Requested for Employee Survey March 2020	Rater	Review Invitation	3/18/2020	—

Project Management

View Overall Project Status

- Open the project.
- To the right of the Project Dashboard you will see the "Project Respondent Status" which will give you the overall project status.



Review Status

Shows the current status of the Raters in the overall review process.

- Approved - The Rater is approved to start the review process.
- In Progress - The Rater is in the process of completing the review.
- Finished - The Rater has successfully completed the review.
- Disabled - The Project Administrator has disabled the Rater's access.
- Opted Out - The Rater has decided to opt out of participating in the review.

Track a Survey's Rating Progress

1. Navigate to the **Home** page of the project.
2. To the right of the Target's name you will see the Target's Rating Progress. This shows you how many surveys have been completed vs. how many raters were assigned to complete the survey.

Survey Target	Rating Progress	Date Added	Action
Employee Survey	16/16	6/20/2019	PDF Report Manage Edit

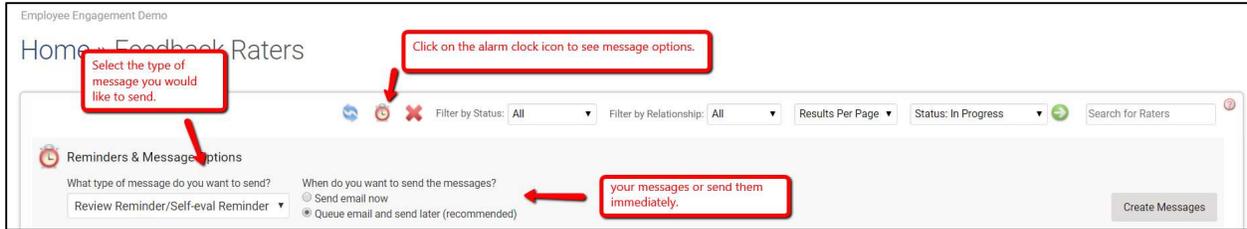
Track Rater Review Statuses

1. From the **Raters** menu, select **Manage**.
2. To the right of each Rater's name you will see their review status.

Rater Name	Survey Name	Status	Relationship	Date Added	Last Access	Login As
Castro, Tahj	Employee Survey	In Progress	Employees	6/20/2019 1:42:00 PM	6/20/2019 1:49:00 PM	Login As
Rater, Sample	Employee Survey	Finished	Employees	6/27/2019 10:21:00 AM	6/27/2019 10:22:00 AM	Login As
Rollins, Wail	Employee Survey	Finished	Managers	6/20/2019 1:42:00 PM	6/20/2019 1:44:00 PM	Login As

Send Review Reminders to Raters

1. From the **Raters** menu option, select **Manage**.
2. Click the alarm clock icon at the top of the page.
3. Select the **Review Reminder** in the message type dropdown box.
4. Choose if you want your message sent now or queued for later.



5. Check the Raters you want to send/queue reminders for. (The system will not let you remind Raters that have completed all of their reviews.)
6. Click the **“Create Messages”** button to send/queue the email.

Report Customization, Generation, and Distribution

Create and Customize a Report Template for Your Project

Create a template:

1. From the **Reports** menu, select **“Edit Report Templates”**.
2. Click **“Create a new template”** from the menu on the left side of the page.
3. Title your report template using a title unique to your project. Select how you would like your template created; we recommend letting the system auto-generate your report template based on your project content.
4. Make sure to select the **Employee Survey Report** type.
5. Click **“Submit”**.

Customize your Template:

1. Each component in your report template has settings that can be configured. All components allow you to use a custom title and introductory text and some components have more advanced settings.

If you choose to segment your reports based on demographic information you will find the resources to do so within the report component settings. These can be adjusted each time you run the project report for different data sets in each report generated.

Segmentation, Filtering and Sorting

Note that the filter and segmentation settings below pertain to reports run in this survey project only. These settings do not clone if you duplicate this report template.

Segment results by responses to question: -- None -- ▾

Response filter (optional): only include respondents that answered...

How long have you been with Sample Company?

Less than 1 Year

1 - 2 Years

2 - 5 Years

Leave all boxes unchecked to include all respondents. Note that changes to your survey's content may affect your selections in this box.

Results sorting: Review Form Order (Default) ▾

Generate Your Employee Engagement Report

1. Navigate to the **Home page** of your project.
2. Click the PDF Report link to the right of the Target name.

Feedback Targets				Results Per Page ▾	Search for Targets
1 Targets					
Survey Target	Rating Progress	Date Added	Action		
Employee Survey	15/16 <div style="width: 100%; height: 10px; background-color: #007bff; border: 1px solid #007bff;"></div>	6/20/2019	PDF Report Manage Edit		

3. Select the Report Template you want to use to generate the report. All Employee Engagement Report Templates for your account will appear here.
4. Click **"Create Report"**.

Create PDF Review Report

Report Options

Report Template: Employee Engagement Template

Set as the default report for this project

Set Password (Optional):

Response Filter: 0

Rating(s) per non-managerial relationship group are required to show results for a particular relationship group.

Cancel Create Report

The report should take 30 seconds or less to generate and then you can download it by clicking on the link that appears when the report is ready. The PDF icon will also appear on the Feedback Target list after the report is generated and can be clicked on to view the report.

Create PDF Review Report

Existing PDF Report File Found

We found an existing PDF report file for that was created on 6/20/2019 1:49:54 PM. Click the link below to download it, or, click the Refresh Report button to create a new report file.

Download Existing Report File

Cancel Refresh Report

Feedback Targets

	Rating Progress	Date Added	
Survey Target			
Employee Survey	15/16	6/20/2019	PDF Report

Export Review Data to Excel

You can export data from any project to Excel by following the instructions below.

1. From the **Reports** menu, select **Export Data Files**.
2. Select the radio button next to the information you want to export. You can export information such as status reports, answers to competencies and items, and comments.

Export and Download Review Data

Output file as: Excel Comma-delimited (CSV) | Emailed reports will be sent to Select the radio button next the information that you would like to export into an Excel or CSV file.

[Create Export File](#)

STATUS EXPORTS

<input checked="" type="radio"/> 1. Target Rating Distribution (Finished Ratings) <small>E:3</small>	Hide
<small>Summary: Lists all Targets and the number of completed ratings from each relationship group.</small>	
<small>Delivery method: generated and emailed to you</small>	
<input type="radio"/> 2. Rater List <small>E:2</small>	Hide
<small>Summary: Lists all Raters in this project, the Targets they are assigned to rate, their relationship group and current response status.</small>	
<small>Delivery method: generated and emailed to you</small>	
<input type="radio"/> 3. Target Rating Distribution (Finished & In-Progress Ratings) <small>E:30</small>	Hide
<small>Summary: Lists all Targets and the number of completed or in-progress ratings from each relationship group.</small>	
<small>Delivery method: generated and emailed to you</small>	

3. Click **“Create Export File”** near the top of the page.
4. Files will be emailed to you once they are generated.