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360 Feedback Report Source

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Target release	
Epic/Issues	🔷 TL-15771 - 360 Feedback ➕ TL-6757 - Add 360 Feedback report source
Document status	DRAFT
Document owner	@ Meredith Henson
CX Lead	@ Meredith Henson
UX/Designer	
Developers	TBC
QA	TBC

Goals

- Add 360 Feedback report source(s)
- Provide 360 Feedback Embedded Reports
- Provide a Manager dashboard to allow them to review Team results
- Provide Administrators a dashboard to view results across the system
- Provide User an improved dashboard to view their feedback results
- Add aggregated results for comparative reporting

Background and strategic fit

Currently there is no reporting available within the Appraisals area or a Report Builder Report Source for 360° Feedback. The ability to review or run analysis on results from a 360 Feedback form will increase the value and uptake of this tool.

Assumptions

- User names will be links to user profiles
- Capabilities/Permissions relating to access to user profiles and reporting information will be applied
- Deleted and Suspended user data won't display in reporting results by default

Requirements

A user or the user's manager may only view individual responses. In order for 360° Feedback and self assessment to provide meaningful analytics, this data should be available as:

- individual responses
- as an average (mean) where questions have a numerical or set scale of values, and
- in comparison against other responses

Additionally a Status report (not unlike Appraisal forms) would offer a summary of which users and have not received or provided feedback.

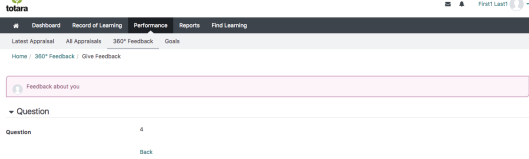There should be a 'view team feedback reports' and view all feedback reports' capabilities.
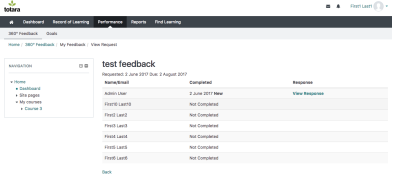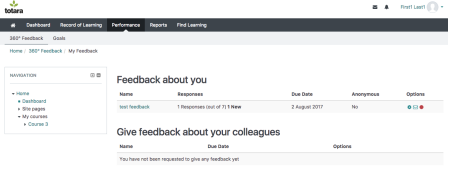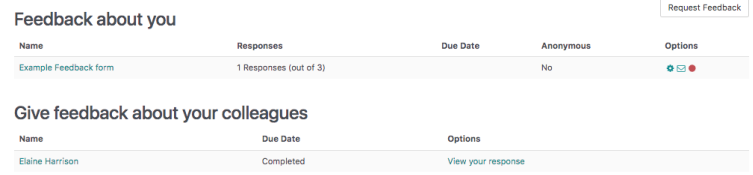
Learners - should see the feedback they have received both as individual responses and aggregated across all responses.
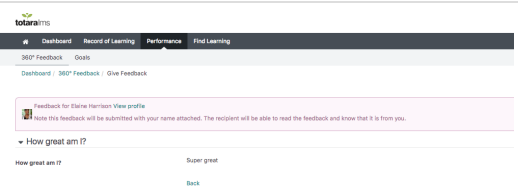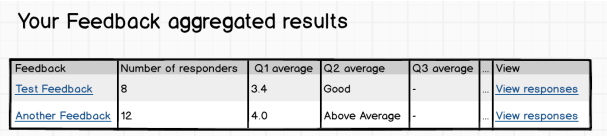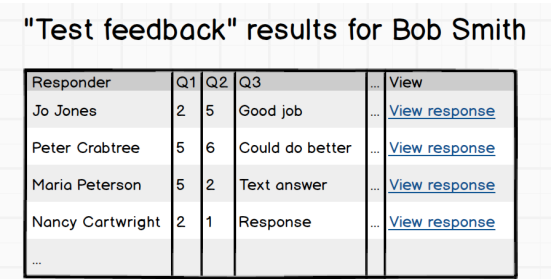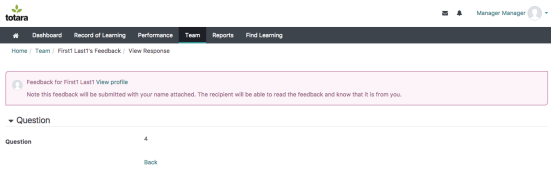
Managers - should see the feedback (individual and aggregations) they have received and any feedback received by team members. They should also see how many of their staff have requested feedback, which form/template is being used, how many responses they have received. In order to provide a point of navigation for Managers to access their team results/reports, a new section on the Performance > 360 Feedback dashboard/page should be added as 'Feedback about your team'.
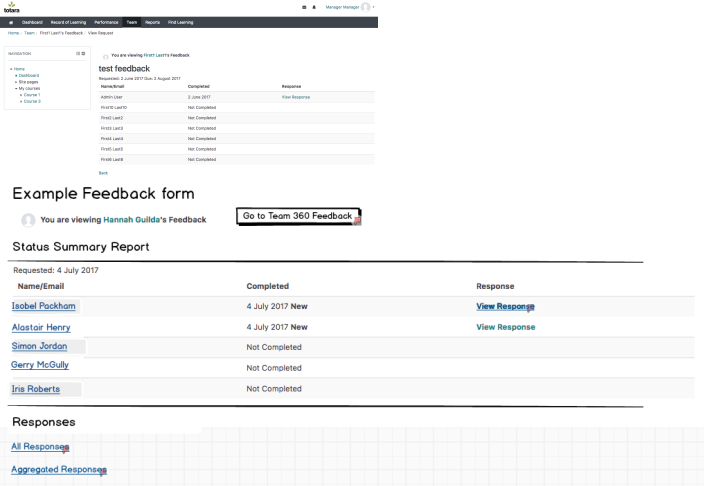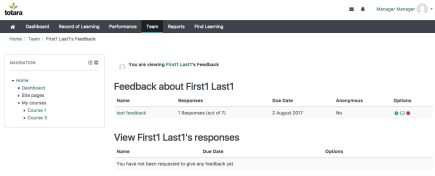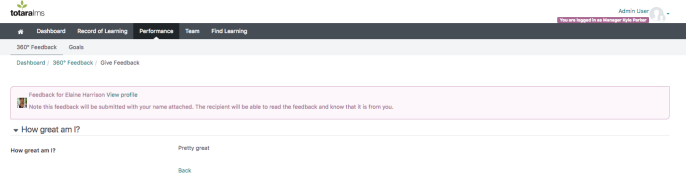
Administrators - should be able to see who has sent a 360 feedback request, how many have been requested across the site, the number of respondents, the status (complete, pending, overdue) of each feedback request and which form/template has been used.
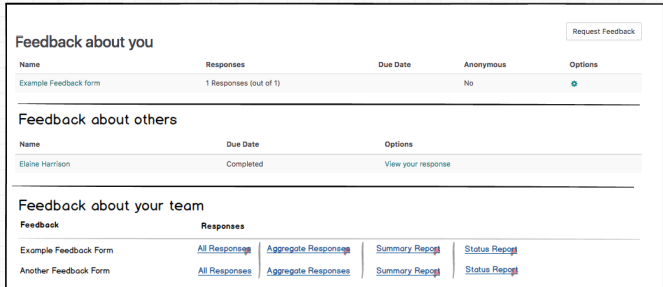
Notes

- Given the 360 Feedback tool and the Feedback activity share a name, it is important that Feedback reports/report sources are all titled '360 Feedback'.
- Given the 360 reports will share a reporting area with Appraisals, the reports should probably include 'Feedback' within the name (e.g Feedback Results Summary) so it is clear for screenreaders
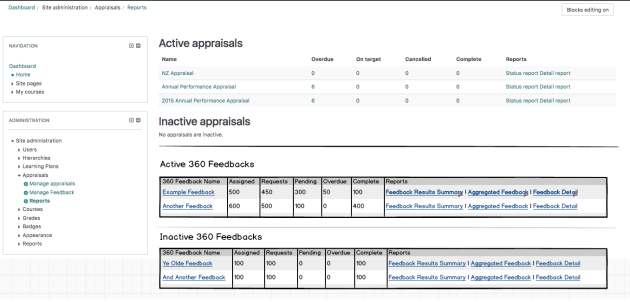
ID	User	Requirement	Feedback Owner(s)	Responder(s)	Feedback(s)	Questions	Answers	Possible now?	Details	Filters
10	Learner	View individual feedback responses (L3)	Learner	1	1	All	All (individually)	Yes	via Feedback about you > Select Feedback form > Select Responder/View Response	None
20	Learner	View summary report of status of a feedback (L7)	Learner	All (individually)	1	Not shown	Not shown	Partially	via Feedback about you > Select Feedback form View response → Report 10	None. Sortable column headers
30	Learner	View summary report of status of all feedbacks (L4, L5, L6)	Learner	All (summary)	All (individually)	Not shown	Not shown	Yes	via Performance > 360 Feedback > Feedback about you Feedback form → Report 20	None
31	Learner	View summary report of status of all feedback requests (L5)	Learner	Learner	All	Not shown	Not shown	Yes	via Performance > 360 Feedback > Feedback about others View your response → Report 32 Feedback form → Report 20	None
32	Learner	View individual feedback	Learner	Learner	1	All	All	Yes	via Performance > 360 Feedback > Feedback about others > View your response/Respond Now	None

ID	User	Requirement	Feedback Owner(s)	Responder(s)	Feedback(s)	Questions	Answers	Possible now?	Details	Filters
		response for others or provide response (L8)								
40	Learner	View aggregated report of responses to all feedbacks (L2)	Learner	All (Summary)	All	All	All (summary)	No	via Performance > 360 Feedback> Feedback about you >Aggregated Results (new nav) View responses → Report ID 20	• Feedback Status (Active or Closed)
41	Learner	Learner views all responses they've received on one feedback form (L1)	Learner	All (individually)	1	All	All	No	via Feedback about you > Select Feedback form > **Feedback responses** View response → Report ID 10	None
50	Manager	View one of their staff's individual feedback responses (M3)	Manager's staff (one at a time)	1	1	All	All (individually)	Yes	via My Team > 360 Feedback for user > Select Feedback form > Select Responder >View Response 	None
60	Manager	View one of their staff's summary report of status of a feedback (M7)	Manager's staff (one at a time)	All (individually)	1	Not shown	Not shown	Partially	via My Team > 360 Feedback for user > Select Feedback form	Sortable Column headers A-Z, Z-A

ID	User	Requirement	Feedback Owner(s)	Responder(s)	Feedback(s)	Questions	Answers	Possible now?	Details	Filters
									View response → Report ID 50 All Responses → Report ID 91 Aggregated Responses → Report 92 Go to Team 360 Feedback → Manager Dashboard	
70	Manager	View one of their staff's summary report of status of all feedbacks (M7)	Manager's staff (one at a time)	All (summary)	All (individually)	Not shown	Not shown	Yes	via My Team > 360 Feedback for user View their response → Report 71 Feedback name → Report 60	N/A
71	Manager	View one staff member's response to a feedback request	Manager's staff (one per row)	All (summary)	All (individually)	All	All	Yes	via My Team > Feedback 360 for user > View your response	N/A

ID	User	Requirement	Feedback Owner(s)	Responder(s)	Feedback(s)	Questions	Answers	Possible now?	Details	Filters
80	Manager	View aggregated report of all of their staff's feedback responses to one feedback (M4, M5)	Manager's staff (one per row)	All (summary)	1	All	All (summary where applicable/possible)	No	 via Performance > 360 Feedback > Feedback About your Team (new navigation as above) > { Chose Feedback form } **Aggregated Responses** View responses → Report ID 91	• Owner • Owner User Status • Owner Job Assignment • Owner Position Name/ID • Owner Organisation Name/ID
90	Manager	View non-aggregated report of all of their staff's feedback responses to one feedback (M1)	Manager's staff (one per row)	All (one per row)	1	All	All (individually)	No	via Performance > 360 Feedback > Feedback About your Team > { Choose Feedback form> **All Responses** View response → Report ID 50	• Owner • Owner User Status (Active, Suspended) • Owner Job Assignment • Owner Position Name/ID • Owner Organisation Name/ID • Responder Name • Responder Job Assignment • Responder Position Name/ID • Responder Org Name/ID
91	Manager	Manager views all feedback responses for one team member for one feedback form (M2)	Manager's staff (one at a time)	All (summary)	1	All	All	No	via My Team > 360 Feedback for user > Select Feedback form > **All Responses**	None

ID	User	Requirement	Feedback Owner(s)	Responder(s)	Feedback(s)	Questions	Answers	Possible now?	Details	Filters
									"Test feedback" results for Bob Smith View response → Report ID 50	
92	Manager	View aggregated responses for one team member for one or all feedback forms	Manager's staff (one at a time)	All (summary)	1	All (summary)	Yes (summary)	No	via My Team > 360 Feedback for user > Select Feedback form > **Aggregated Responses** Hannah Guilda's Aggregated Responses View responses → Report ID 91	• Feedback Name • Feedback Status (Active/Closed)
100	Manager	View summary report of status of all staff's feedbacks (M6)	Manager's staff (one per row)	All (summary)	All (individually)	Not shown	Not shown	No	via Performance > 360 Feedback > Feedback about your Team > **Status Report** Status Report - 360 feedbacks for your team View responses → Report ID 91	• Feedback Name • Owner • User Status (Active, Suspended) • Owner Job Assignment • Owner Position Name/ID • Owner Organisation Name/ID • Due Date
110	Manager	View summary report of status for each feedback form across their team (M6)	Manager's team	All (summary)	All	Not shown	Not Shown	No	via Performance > 360 Feedback > View Team Feedback (new) > **Summary Report** 360 feedback Summary for your team All responses → Report ID 90 Aggregate responses → Report ID 80	• Status (Active or Closed)
120	Admin	View aggregated	All users (one per	All (summary)	1	All	All (summary)	No	via Site Administration > Appraisals > Feedback Reports > **Aggregated Feedback**	• Owner • Owner Status

ID	User	Requirement	Feedback Owner(s)	Responder(s)	Feedback(s)	Questions	Answers	Possible now?	Details	Filters
		report of all staff's feedback responses to one feedback (A4)	row)						"Test feedback" aggregated results for all users Owner / Number of responders / Q1 average / Q2 average / Q3 average / ... / View Bob Smith / 2 / 3.4 / Good / - / View responses Nancy Cartwright / 3 / 5.4 / Above Average / - / View responses Jo Jones / 5 / 2.8 / Above Avergae / - / View responses Harry Shearer / 8 / 3.8 / Excellent / - / View responses ... View responses → Report ID 41	• Owner Job Assignment • Owner Position Name/ID • Owner Organisation Name/ID • Audience Name/ID
130	Admin	View non-aggregated report of all staff's feedback responses to one feedback (A1)	All users (one per row)	All (one per row)	1	All	All (individually)	No	via Site Administration > Appraisals > Feedback Reports > **Feedback Detail** "Example feedback" results for all users Owner / Responder / Q1 / Q2 / Q3 / View Hannah Guilda / Jo Jones / 2 / 5 / Good job / View response Bob Smith / Peter Crabtree / 5 / 6 / Could do better / View response Nancy Cartwright / Maria Peterson / 2 / 4 / Text answer / View response Nancy Cartwright / Responder 2 / 1 / 7 / Response / View response Nancy Cartwright / Responder 3 / 4 / 3 / Another answer / View response Jo Jones / Responder / 5 / 1 / Another answer / View response Harry Shearer / Bob Smith / 3 / 4 / Another answer / View response Peter Crabtree / Jo Jones / 5 / 7 / Yet another answer / View response ... Back View response → Report ID 10	• Owner Name • Owner Status • Owner Job Assignment • Owner Position Name/ID • Owner Organisation Name/ID • Audience Name/ID • Responder Name • Responder Job Assignment • Responder Position Name/ID • Responder Org Name/ID Pagination
140	Admin	View Aggregated report of all 360's in the system and their status (A5,A6)	All users (summary)	All	All	Not shown	Not shown	No	via Site Administration > Appraisals > Feedback Reports Feedback form → Site Admin > Appraisals > Manage Feedback (.../totara/feedback360/manage.php) Feedback Results Summary → Report 150 Aggregated Feedback → Report 120 Feedback Detail → Report 130	• Feedback Name • Feedback Status (Active/Closed)
150	Admin	View summary	All users (summary)	All	All	All (summary)	All (summary)	No	via Site Administration > Appraisals > Feedback Reports > **Feedback Results Summary**	None

ID	User	Requirement	Feedback Owner(s)	Responder(s)	Feedback(s)	Questions	Answers	Possible now?	Details	Filters
		aggregated results report of a 360 Feedback (A3)							"Another Feedback" aggregated results	

#Responders	Q1 average	Q2 average	Q3 average	...	View
600	3.4	Good	Above Average	...	View responses

View responses → Report ID 130

Related JIRA Tickets

- TL-9315 - 360 Feedback to include self evaluation CLOSED - Add self assessment to 360 Feedback
- TL-13880 - Option to show user/responder relationship within 360 Feedback reports OPEN - Option to show user/responder relationship within 360 Feedback reports
- TL-13903 - Ability to identify relationship with user/responder when requesting 360 feedback OPEN - Ability to identify relationship with user/responder when requesting 360 feedback

User Journeys

Learner

L1: Learner views all responses they've received on one feedback form (Report : 41)

L2: Learner views aggregation of responses to one or all feedbacks (Report ID: 40)

L3: Learner views one feedback response (Report ID:10)

L4: Learner views status of feedback they've provided (Report ID: 30 ((Feedback about others)))

L5: Learner views status all feedback they need to provide (Report ID: 30, 31 ((Feedback about others)))

L6: Learner view status of all feedback requests (Report ID: 30 ((Feedback about you))

L7: Learner view status of one feedback form (Report ID: 20)

L8: Learner views feedback request responses (Report ID: 32)

Manager

M1: Manager views all feedback responses for all team members for one feedback form (Report ID: 90)

M2: Manager views all feedback responses for one team member for one feedback form (Report ID: 91)

M3: Manager views one feedback response for one team member (Report ID: 50)

M4: Manager views aggregated responses for all team members for one feedback form (Report ID: 80)

M5: Manager views aggregated responses for one team member for one or all feedback forms (Report ID: 92)

M6: Manager views status of all team member's feedback (Report ID: 100 and 110)

M7: Manager views status of one team member's feedback (Report ID: 60 and 70)

M8: Manager view one staff member's response to a feedback request (Report ID: 71)

Administrator

A1: Admin views all feedback responses for all users for one feedback form (Report ID: 130)

A2: Admin views all feedback responses for one user for one feedback form (Report ID: 130 with filter/search)

A3: Admin views aggregated responses for all users for one feedback form (Report ID: 150)

A4: Admin views aggregated responses for one user for one feedback (Report ID: 120)

A5: Admin views aggregated status for all users for one feedback (Report ID:140)

A6: Admin views the status of one or all feedback forms (Report ID: 140)

Out of Scope

Phase 2+ Development Ideas

Comparative reporting across feedback forms for individuals and across teams.

Noting that some feedback forms will have different questions etc so direct comparison might not always be possible, but for a lot of organisations they reuse the same forms so they can track progress and development.   Perhaps some consideration given to template driven 360 forms so feedbacks using the same template can be comparatively reported against.