Saville assessment

Nordic Alliance Partner

Oasys User Guide

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Oasys Guide

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Introduction to Oasys

This user guide is designed to give an overview of Oasys platform administration. It has been structured according to the tabs used to navigate around the platform.

Overview page

The overview page is the first page, the user sees, and provides details of the projects, an administrator has created and new assessment reports available to be viewed.

For administrators, the page view can be changed using the drop-down menu and selecting 'Switch View'.

For assessees, there will be a task card for each assessment, they have been invited to complete, as well as any they have already started or completed previously. There will also be a 'My Profile' task card, where they can complete any research data, which is entirely optional.

To navigate back from other pages on the platform to the overview page, you can select the platform logo on the navigation menu at the top of the page.

Unread reports

All new reports generated by the user are displayed here. When a report has been viewed, it is removed from this page, but it will continue to be stored under the 'My Reports' tab.

My projects

This lists all the projects created by the user. This is especially useful for system administrators, as it filters out projects created by other users.

Organization

The 'Organization' tab is designed for System Administrator users to edit the organization's details, particularly in relation to emails sent from Oasys.

Projects

The 'Projects' tab is designed for administrators to create and manage assessment projects.

Projects are listed in chronological order with the most recent at the top of the list. Page navigation and a search field are provided to enable users to easily find projects.

From this tab, administrators can:

- Create new projects
- View project details to manage existing projects (depending on how the project has initially been set up)
- Add existing assessees/create and add new assessees to a project
- Check assessment completion status
- Edit project-specific email templates
- Send reminder emails
- Configure/re-configure automatic reporting
- View and/or manually generate reports
- Generate group overviews
- Reset test
- Extract scores
- Close projects
- Reactivate closed projects

For more information, see Oasys user guides:

- Creating a project
- Editing email templates
- Generating and sharing group overviews
- Generating score extracts
- Manual report generation
- Resetting tests
- Sending reminder emails

My details

The 'My details' tab allows the user to review his or her mandatory personal details and to change their username and password.

Users can also manage the security of their account through reviewing current active sessions, terminating any sessions that are no longer required, as well as reviewing the details of the 10 most recent login attempts.

Editing login details

- Select the 'My Details' tab.
- Select the 'Edit login details' link from the sub menu.
- Replace the currently displayed username with a new username.
- Enter a new password.
- Confirm the new password by re-entering it.
- Select 'Save'.

My reports

The 'My Reports' tab is used to download assessment reports in PDF format and access any group overviews generated. Further information on how to generate a group overview is provided in the user guide 'Generating and sharing group overviews'.

All reports generated for any project created by a specific administrator, whether manually or automatically, are stored on the 'My Reports' page, until the data retention period has been reached. The reports are displayed in chronological order with the most recent at the top of the list.

Page navigation and a search field are provided to enable users to easily find reports. You will be able to download reports in any of the languages currently available for a report in addition to the languages available on your platform.

Downloading a report

- Go to the 'My Reports' tab.
- Find the report, you require, by either using the page navigation or search facility.
- Select the required language from the drop-down list in the 'Actions' column.
- Select the 'View PDF version of report' next to the relevant report.
- Dependent on your browser you may be required to select either the 'Open' or the 'Save' option.

Administrator (visible to System Administrator)

The 'Administrator' tab allows system administrators to create new administrator users and manage existing ones; this can be users up to the same Oasys role level as the administrator creating them. There are three administrator levels: System Administrator, Project Administrator and Report Viewer. Further information on, what each role can do, is provided in the user guide 'Administration of Users'. Each user can only have one role associated with them, so if a user requires more than one role, you will need to create multiple users for that person. If you need to de-activate a user (if they no longer works for the organization, e.g.), this can be done by changing the status to 'Inactive'.

Creating a new administrator

- Go to the 'Administrator' tab.
- Select the 'Create administrator' link from the page options.
- Enter the required user details and select the 'Create' button. By default, the user role will be Project Administrator.

Managing existing administrators

- Go to the 'Administrator' tab.
- Search for the user required, then select 'Details' from the ‘Actions’ drop-down menu.
- If you wish to change any details, select the 'Edit' button.
- When you have finished making changes, select 'Save'.

Assessee

The 'Assessee' tab allows administrators to create new assessees and manage existing ones. If you need to de-activate a user, this can be done by changing its status to 'Inactive'.

Creating a new assessee

- Go to the 'Assessee' tab.
- Select the 'Create assessee' link from the page options.
- Enter the required user details and select the 'Create' button.

Managing existing assessees

- Go to the 'Assessee' tab.
- Search for the user required, then select 'Details' from the ‘Actions’ drop-down menu.
- If you wish to change any details, select the 'Edit' button.
- When you have finished making changes, select 'Save'.

Please note, that for security reasons, once assessees have been created, their email addresses cannot be edited by any administrator. If the email address has been entered incorrectly during assessee creation, the user will need to be made inactive and then recreated with the correct email address.

Administration of Users

The 'Administrator' and 'Assessee' tabs allow administrators to create new users and manage existing ones.

Please note, that only System Administrator-level users or higher will see the Administrator tab. Project Administrators will only see the Assessee tab.

Creating an administrator or report viewer

- Go to the 'Administrator' tab.
- Select the 'Create administrator' link from the options.
- Enter the user details and select the 'Create' button.

When creating a new administrator, by default the 'Project Administrator' level user role is selected.

If you are creating a Report Viewer, select the 'Report Viewer' level instead.

To create a new system administrator, the user needs to be created as a project administrator first. This role can be changed to a higher level via the 'Administrator' tab afterwards.

Each user can only have one administrator role associated; a higher-level role will encompass the access rights of all the roles below it (apart from Assessee).

Please note, that once a user has been created, its role cannot be switched back and forth between an assessee and an administrator. A new user will need to be created in this case.

System Administrator, as the higher-level administrator, is capable of changing the role of an administrator between System Administrator, Project Administrator and Report Viewer.

Send login details/new password

- Go to the 'Administrator' tab.
- Find the relevant user and select ‘Actions’.
- You will now be able to view the user details, send a username reminder or reset the password.
- ‘Send username reminder' or 'Send password reset' actions will happen, as soon as the button is selected, and you will receive a confirmation message at the top of the screen confirming that the email has been sent.
- If you want to edit a user's information, select "Details" from the "Actions" drop-down menu.
- If you want to change any details, select the "'Edit"' button.

- When you have finished making changes, select 'Save'.

User roles

System Administrator can

- Create and edit projects
- View and generate reports
- Extract scores
- View group overviews
- Create users in one of these roles: System Administrator, Project Administrator, Report Viewer, Assessee
- View all assessees and projects created by administrators of all levels
- Add other administrators to existing projects
- access the 'Organization' tab
- Manage email templates

Project Administrator can

- Create and edit projects
- View and generate reports
- Extract scores
- View group overviews
- only view projects and assesses, they have created, and reports, they have generated, unless they have been added to a project created by another system administrator (for further information, refer to the user guide 'Adding project users to existing projects')
- not access the 'Organization' tab

Report Viewer can

- View generated reports
- Extract scores
- View group overviews
- only view projects, assessees and reports that have been generated for the projects, they have been added to by another administrator (for further information, refer to the user guide 'Adding project users to existing projects')
- not access the 'Organization', 'Administrator' or 'Assessee' tabs

Assessee can

- Complete assessments
- Edit 'My Profile', including research data fields, when consent is given to use the information in accordance with Saville's Privacy Policy
- Manage the security of their account through reviewing their current sessions and recent activity
- View reports (if permitted)

Deactivating or Transferring an Existing User

Deactivating an existing user

Deactivating a user prevents it from logging on to the Oasys platform with its username and password and accessing data. E.g., if an administrator no longer works for the organization or manages projects on Oasys.

A user can be deactivated by changing its status from 'Active' to 'Inactive' via the Administrator or Assessee tabs. If you wish to anonymize the user being deactivated, please refer to the user guide 'Manually erasing an assessee'. Please note, that the anonymization process cannot be undone.

Deactivating an existing user:

- Go to the 'Administrator' or 'Assessee' tabs.
- Search for the user required.
- Select the 'Actions' button and choose 'Details' from the drop-down menu.
- Select the 'Edit' button.
- Change status from 'Active' to 'Inactive'.
- Change any other details if required.
- Select 'Save' to finish.

An inactive user can be reactivated again by changing its status from 'Inactive' to 'Active'. Once its status has been updated, the user will regain access and all the rights it previously had.

If the previous administrator is a system administrator, it may be simpler to deactivate the user and create the new administrator with the same role. The new administrator will be able to see all the projects previously created.

If a new project administrator is to be created and requires access to certain existing projects, it can be added to individual projects by a system administrator (for further information, refer to the user guide 'Adding project users to existing projects').

Transferring an existing user

If you wish to transfer the administrator's user account to another individual instead, this can be done by changing the information of the existing user. It is important to reset the password as well as update the email address to prevent the previous administrator from gaining access.

Creating a Project

This user guide explains how to create projects using invited-access assessments. An invited-access assessment is an unsupervised assessment that can be completed remotely (e.g. at home).

Creating a new project

There are four steps to creating a project:

1. Name, description, purpose and role level
2. Add instruments
3. Configure email templates
4. Configure reporting

Step 1: Name, description, purpose and role level

- Select 'Projects'.
- Select the 'Create new project' link from the project options.
- Enter the project name and description, the purpose and role level for the project and a PO reference number if required.
- Select 'Next'.

Step 2: Add instruments

- Add the test, you require, from the 'Instruments available for this project' list by selecting the 'Add instrument' button.
- If you need to remove an instrument from your selection, select the 'Remove instrument' button. Your selection of instruments is located below the list of available instruments. Please note, that it is not possible to add or remove instruments from a project, once you have finished the creation process; it is crucial to select the correct instrument(s) at this stage.
- You can also configure the available languages for the instrument(s) on this page. By default, all available instrument languages that are loaded on your platform will be available for the assessee to choose from. If you wish to restrict the list of languages for each instrument, select 'Edit languages for instrument' for each of your chosen instrument(s), deselect the language options, you want to remove, then select 'Confirm'.
- Once you have selected the required instruments and languages, select 'Create project'.

Step 3: Configure email templates

At this point your project is set up. Three email templates are automatically added to the project, which you will need to review and configure accordingly:

- Select the 'View project details' link from the project options.
- Select the 'Edit project emails' link from project options.
- Select the 'Edit template' button next to the template, you wish to review.
- After making changes to a template, select the 'Save' button at the bottom of the page to temporarily save the edits, you have made, and continue to review the other templates.
- Once you are satisfied with all the email templates, select the 'Save' button to permanently save the changes. These changes will appear for new assesses added to the project.
- Click save twice.

There are three templates which may require configuration:

- Assessee Invite: Project invitation email for the assessee to complete assessments
- Report: Report generation notification
- Assessee Reminder: Reminder email for the assessee to complete assessments in a project

Please note: It is important that you do not remove or amend the $$$ signs, as these indicate dynamic (runtime) fields that will be automatically populated by Oasys. However, the $$$-deadline phrase is an exception. It is recommended to remove this completely and instead state a possible deadline in a separate email to make it as generic as possible.

For further information on editing email templates, please refer to the user guide 'Editing email templates'.

Step 4: Configure automatic reporting/change norm group

If you would like to manually generate reports, after assesses have completed assessments, you can do so by selecting the 'Generate reports' link from the project options. For more information on manual reporting, please refer to the user guide 'Manual report generation'.

If you would like reports to be generated automatically, as soon as assesses have completed the assessments, please follow these steps:

- Select the 'Configure automatic reporting' link from the project options on the 'Project assesses' page.
- Select the 'Add reports' button.
- Select the report(s) from the list – please note that you can select more than one report by pressing and holding the Ctrl button on your keyboard.
- Once you have selected all the reports, you would like to generate, select the relevant instrument(s) from the list.

- Select the norm group(s), you require, from the list.
- Decide, whom to make the reports available to, via the My Reports area – administrators, assesses or both. You can also configure, who will receive a report generation email notification.
- You will be presented with an overview of all reports configured for automatic generation within the project.
- If you would like to remove any reports, please select the 'Remove report' button.
- If you wish to add any further reports, please select the 'Add reports' button.

Adding assesses to a project

You may wish to send a test link to a completely new individual, or to reassess an individual, who has already been created as a user on the platform.

To create a new assessee

The following steps detail the two ways of creating new assesses and adding them directly to your project.

Step 1: Create a new individual assessee

- Select the 'Create and add assessee to the project' link from the project options on the 'Project assesses' page.
- Create a username of your choice and select the email template 'User created'.
- Enter the assessee's first name, last name, language and email address.
- Select the 'Add' button to create the new assessee and add it to your project.
- As soon as the 'Add' button is pressed, both the login details email and the invitation email will be automatically sent in the chosen language.
- Repeat for all assesses required.

Step 2: Create multiple assesses via bulk upload

- Select the 'Assessee upload' link from the project options on the Project assesses page.
- Select 'New assessee upload'.
- Select the required email template that will be sent out to assesses on upload, and the language that you wish the emails to be sent out in (only languages that are available on your platform will be in this list). This language will become the assessee's preferred language on the first login. You can only select one language per upload.
- Paste three columns from an excel spreadsheet or table into the box on this page: First name, Last name and Email address. See this Excel sheet.
- Select 'Upload' to create them as assesses and add them to your project.
- As soon as the 'Upload' button is pressed, both the login details email and the invitation email will be automatically sent in the chosen language. Please note, that the login details email will not be sent to existing users.
- You will be returned to the previous page, where you will be shown all assessee upload requests for that project.

To add an existing assessee

- Select the ‘Add Assessee’ from the project options on the ‘Project assesses’ page.
- Find the assessee by searching for its first name, last name, email address or username.
- Add it to your list of added assesses using the ‘Add user’ button.
- When an assessee has been successfully added to the project, a green tick will appear by its details.
- Repeat for all assesses required.
- Once you have selected the existing assesses you require, select ‘Return’ at the bottom of the screen.
- As soon as the assessee is added to the project, the invitation email will be automatically sent. However, as existing assesses they will have previously received a username and a password, so they will not receive new ones.

The assessee may not remember his or her username and/or password. For information on how to resend login details, please refer to the ‘Managing an Existing User’ section in the ‘Administration of Users’.

Assessment Languages

By default, the Oasys platform will allow assesses to specify, which of the many languages available for an assessment they would like to complete the assessment in. This user guide explains how to restrict or remove the need to specify the language(s), an assessee may complete an assessment in.

For information on creating new projects, please refer to the user guide 'Creating a project'.

Assessment specific

The language configuration is assessment specific. E.g. an aptitude assessment could be configured to allow completion in all available assessment languages, while a styles assessment in the same project could be configured to allow completion in either English or French.

Single or multiple languages

If you want all assesses in a project to complete an assessment in one particular language, this can be configured, so that only that language will be made available to each assessee irrespective of the language, they select when logging in to Oasys. Similarly, each assessment can be configured for multiple languages.

Assessee notification

An assessee will still be able to view the Oasys platform in his or her first language (if available) but will be restricted to the language(s) that have been specifically configured for completion in this particular instance. If an assessee logs in to Oasys in a language that is not available for the assessment in that specific instance, they will be asked to select a language that is available.

Language configuration editing

If you have created a project, where the language has been configured, you can amend the configuration post setup; e.g., for any new assesses being added to the project, who have different language requirements. This new language configuration will also apply to any assesses previously added to the project, who have not yet completed the assessment.

Configuring assessment languages

The assessment language can be configured during the ‘Add Instruments’ stage of project creation and can also be amended post creation.

- Add the assessments, you require, from the ‘Instruments Available for this Project’ list.
- To specify, which language(s) an assessee can complete an assessment in, select the ‘Edit Languages for Instrument’ button.
- By default, all the currently available languages for that assessment will be selected. To restrict the languages available, select the ‘Deselect language’ button representing the appropriate language(s) and select ‘Confirm’.
- Continue with the remaining steps in the usual way for creating a new project.

Editing/removing assessment languages for existing projects

- Select ‘Projects’.
- Search for the project, then select the ‘Project details’ option from the ‘Actions’ drop-down menu.
- Select ‘Edit Project’, then select the ‘Instrument cultures’ button representing the required instrument.
- On the next screen, the currently selected languages will be displayed with the remaining language options displayed underneath. Either add or remove languages as required, then select ‘Confirm’.
- To remove the need to select a language altogether, deselect the check box ‘Assessee Select Language’ per instrument as required.
- Select ‘Save Changes’.

Editing Email Templates

This user guide explains how to amend the email templates within an existing project.

The project specific email templates are automatically added, when a project is created. Any changes to these templates will only affect the specific project.

- Select ‘Projects’.
- Find the relevant project, then select the ‘Project details’ option from the ‘Actions’ drop-down menu.
- Select the ‘Edit project emails’ link from project options.
- Select the ‘Edit template’ button next to the template, you wish to review.
- After making changes to a template, select the ‘Save’ button at the bottom of the page to temporarily save the edits, you have made, and continue to review the other templates.
- Once you are satisfied with all the email templates, select the ‘Save’ button to permanently save the changes. These changes will appear for new assesses added to the project.
- Click save twice.

There are three templates, which may require configuration:

- Assessee Invite: Project invitation email for the assessee to complete assessments
- Report: Report generation notification
- Assessee Reminder: Reminder email for the assessee to complete assessments in a project

Please note: It is important that you do not remove or amend the $$$ signs, as these indicate dynamic (runtime) fields that will be automatically populated by Oasys. However, the $$$-deadline phrase is an exception. It is recommended to remove this completely and instead state a possible deadline in a separate email to make it as generic as possible.

Adjusting the Time Limit

This user guide explains how to adjust the time limit for an aptitude assessment on your Oasys platform. When necessary, seek advice and support regarding how best to accommodate an assessee's disability in an assessment process.

The best source of advice on possible accommodations is often the assessee themselves. Saville Assessment and other organizations can provide advice on the assessment process for people with disabilities, although the decision to make an adjustment rests with the test user or employer.

- Create the project in the usual way via 'Projects'.
- Add assesses to the project to complete the set-up process.
- Select 'View assessment' from the 'Actions' drop-down menu next to the relevant assessee.
- Select the 'View workflow details' button.
- Select the 'Adjust time limit' button.
- Provide an 'Additional time percentage' from the drop-down menu, which will add on a percentage of the original test completion time limit to the assessee's test timer.
- There is also a 'Disable time limit' checkbox, which, when selected, turns off the test timer on an assessee's aptitude test. However, please contact support@savilleconsulting.dk for advice and guidance before choosing this option.
- Select the 'Submit' button to save the adjustment and to record the information in the 'Timing adjustment' column.
- If you subsequently need to reset the assessee, any previously set time adjustment will automatically be applied unless changed.

Resetting Assessments

This user guide explains how to reset a completed or partially completed assessment.

Occasionally, an assessee may make a mistake in responding to a questionnaire or get locked out of his or her aptitude assessment due to technical issues. In these cases, the assessment will need to be reset.

This can be done via the 'Assessee' tab, if you need to reset a particular assessee but do not know, which project they are part of, or via 'Projects', if you are managing a project.

Resetting assessments by user

- Select 'Assessee'.
- Search for the assessee, then select the 'Details' option from the 'Actions' drop-down menu.
- The projects assigned to the assessee will be listed at the bottom of the page. Select the 'View details for assessment' button next to the relevant project.
- Select the 'View workflow details' button.
- Select the 'Reset Test' button next to the relevant assessment.
- Select 'Yes', if you are sure, you want to reset the assessment for this assessee.

The assessment will now be reset and will appear in the assessee's list of current tasks on the next login. The reset will also be logged on the 'Workflow' page.

Resetting assessments by project

- Select 'Projects'.
- Search for the project, in which the assessee has started or completed the assessment, then select the 'Project assessees' option from the 'Actions' drop-down menu.
- Search for the assessee within the project and select the 'View assessment' option from the 'Actions' drop-down menu.
- Select the 'View workflow details' button.
- Select the 'Reset Test' button next to the relevant assessment.
- Select 'Yes', if you are sure, you want to reset the assessment for this assessee.

Please note, that the reset process does not automatically send an email to the assessee, they will need to be informed that the assessment has been reset and will be available on his or her next login.

Sending Reminder Emails

This user guide explains how to send a reminder email to assesses, who have not completed their assessment(s).

This can be done via the 'Projects' option, if you are managing a project, or via the 'Assessee' option, if you are searching for a particular assessee.

Sending reminders by project

Sending reminders to individual assesses:

- Select 'Projects'.
- Search for the project, then select the 'Project assessees' option from the 'Actions' drop-down menu.
- A status is given for each assessee. 'Created' means, that the assessee has not yet started the assessment, and 'Started' means, that the assessee has partially completed the assessment or completed some, but not all, assessments within the project.
- Select the 'View Assessment' option from the 'Actions' drop-down menu next to the relevant assessee.
- On the next page, select the 'Send reminder email' button.
- Review the email text displayed on the next page. You may want to amend the existing text or add new text, e.g., updating assessment deadline information (which can be found on the 'Edit project' page).
- Select the 'Send Reminder' button.

Sending a bulk reminder to all assesses:

- Select 'Projects'.
- Search project, then select the 'Project assessees' option from the 'Actions' drop-down menu.
- Select 'Send Bulk Reminder Emails' link from the project options.
- Select, which assesses you wish to send the reminder email to: those in the Created and/or the Started state.
- You also have the option to reset and send login details to assesses with the reminder email. However, any passwords that assesses might have saved will no longer be valid.
- Select 'Send' to send the reminder emails.

Please note, that it is important to review the reminder emails before starting the bulk reminder process.

Sending reminders to assessee

- Select ‘Assessees’.
- Search for the assessee required, then select the ‘Details’ option from the ‘Actions’ drop-down menu.
- In the bottom section of the page, a list of projects will be displayed. Select the 'View details for assessment' button next to the relevant one.
- On the next page, select the 'Send Reminder Email' button.
- Review the email text displayed on the next page. You may want to amend the existing text or add new text, e.g., updating assessment deadline information (which can be found on the ‘Edit project’ page).
- Select the 'Send Reminder' button.

Managing Projects

This user guide provides you with an overview of important points in relation to managing existing projects.

With ongoing projects, you may find that you wish to add assessees, check completion status, send reminders, generate additional reports or add other project users with administrator privileges to manage the project. Some of these topics are covered in detail in other sections.

Additional assessees can be added to an existing project at any time. However, we recommend that you check that the reports, deadline information and the invitation email are correct for the new assessee(s).

Automatic report configuration

Before adding new assessees, you may wish to check that the current reports configured for automatic generation are relevant for them. If not, you can either change the configuration or, if there are other existing assessees yet to complete, consider creating a separate project.

- Select 'Projects'.
- Find the relevant project and then select the 'Project assessees' option from the 'Actions' drop-down menu.
- Select the 'Configure Automatic Reporting' link from the project options.
- Remove any unwanted reports by selecting 'Please select to remove report'.
- Select the 'Add Reports' button to select reports, you require, exactly as you would with a new project.
- Here you can specify, if the report should be made available under 'My Reports' either for the administrator, the assessee or both by selecting the 'Send Report to [Administrator/Assessee]' option.
- You can also specify, whether to notify the user that a report has been generated, by selecting 'Always Notify' or defaulting to the project settings if managed through the project details, or suppress the notification being sent by selecting 'Never Notify'.
- For more information, refer to the user guide 'Creating a project'.

Editing instrument languages for existing projects

The following steps will allow you to edit the languages specified for a project.

- Select 'Projects'.
- Find the relevant project, then select the ‘Project details’ option from the ‘Actions’ drop-down menu.
- Select ‘Edit project’ from the project options.
- Select 'Instrument cultures' for each desired instrument to make your amendments.
- Once you have added and/or removed the relevant languages, select 'Confirm'.
- Select 'Save Changes' on the next screen.

Email configuration

Before adding new assessees to a project, you may wish to check, that the invitation email contains the correct information, particularly in relation to the deadline.

- Select 'Projects'.
- Search for the project, then select the 'Project details' option from the 'Actions' drop-down menu.
- Select 'Edit project emails' from the project options.
- Select 'Edit template' next to the assessee invite template, review and then select 'Save Changes'.
- Repeat the previous step for the other email templates.
- Once you are satisfied with all three templates, select 'Save'. These changes will appear for new assessees added to the project.

Please note: It is important that you do not remove or amend the $$$ signs, as these indicate dynamic (runtime) fields that will be automatically populated by Oasys. However, the $$$-deadline phrase is an exception. It is recommended to remove this completely and instead state a possible deadline in a separate email to make it as generic as possible.

Updating project deadlines

Before adding new assessees to a project, you may want to check to see, if the deadline has been updated. To find out, follow these steps before sending out invitation emails.

- Select 'Projects'.
- Search for the project and select 'Project Details' from 'Actions' in the drop-down menu.
- Select 'Edit Project Emails’ from the submenu.
- Click on 'edit template' next to 'Assessee invite’
- Find the template for the required language and change the sentence with the deadline.
- If there is no deadline, then we recommend removing the sentence altogether.
- Scroll down to the bottom and press 'save changes' – and press ‘save email configuration’ on the next page.

Checking Assessee Status

- Select 'Projects'.
- Search for the project, then select the 'Project assessees' option from the 'Actions' drop-down menu.

The list of assessees will show a completion status for each individual:

- 'Created' means, that the assessee has not started.
- 'Started' means, that they have partially completed the relevant assessment(s).
- 'Completed' means, that they have completed all assessments within the project.

It is possible to send a reminder email to assessees with a status of 'Created' or 'Started'. For more information, refer to the user guide 'Sending reminder emails'.

Viewing generated reports

All reports, which a project user has generated, are stored on the 'My Reports' page, until the data retention period has been reached. However, when managing a project, it is sometimes useful to be able to see all the reports generated within it.

- Select 'Projects'.
- Search for the project, then select the 'Project assessees' option from the 'Actions' drop-down menu.
- Select the 'View Generated Reports' link from the project options.

The list can be searched or sorted alphabetically or numerically. Select the header of a column to sort the list in ascending order. Select the header again to sort the list in descending order.

From the ‘Generated Reports’ page you can also bulk download all generated reports within the project:

- Select the ‘Bulk Downloads’ link from the project options.
- Choose an available language for the download.
- Select ‘Generate New Download’ (depending on the number of reports that have been generated, the download can take some time to process).

Please note, that reports, not available in the language you have selected, will download in English (UK).

Generating additional reports

Any additional reports required from an assessment can be manually generated. For more information, refer to the user guide 'Manual report generation'.

Editing project name and description

- Select 'Projects'.
- Find the relevant project, then select the 'Project details' option from the 'Actions' drop-down menu.
- Select 'Edit project' from the project options. Once you are satisfied with the updates made, select 'Save Changes'.

Adding project users to existing projects

This can only be done by system administrators and outlines how to add project users to an existing project. This allows multiple project users to access a project and manage a project between them.

- Select the 'Projects' tab.
- Search for the project, then select the 'Project details' option from the 'Actions' drop-down menu.
- Select 'Edit project users' from the project options.
- Find the project user by searching for his or her first name, last name, email address or username.
- To add a project user, select the 'Add user to project' button.
- Repeat the last step for additional project users.
- To remove a project user, select the 'Remove user from project' button.
- Project users with a lighter shaded button next to them cannot be added or removed.

Manual Report Generation

This user guide explains how to generate reports, after an assessee has completed his or her assessment(s).

Automatic report generation is triggered at the moment the assessee completes his or her assessment. If additional reports are needed at a later time, they can be manually generated. It is possible to generate a report or reports for one assessee or several assessees at the same time. However, the steps will be slightly different.

Manual report generation for one assessee

- Select 'Projects'.
- Search for the project, in which the assessee has completed the assessment, then select the 'Project assessees' option from the 'Actions' drop-down menu.
- Select the 'Generate reports' link from the project options.
- Since you're only generating reports for one person, select 'Individual'.
- Choose the relevant assessee from the list.
- Select the report(s) you would like to generate (hold down the 'Ctrl' key to select multiple reports), then press 'Select'.
- Select the relevant instrument (usually only one instrument available) for each report, then press 'Select'.
- Select the required norm group for each report, then press 'Select'.
- You will be presented with two report delivery options:
    - Send report(s) to the participant – the assessee will be able to download his or her own report(s) from Oasys
    - Send report(s) to me – you will be able to download the report(s) from Oasys
- Select your preferred delivery option, then press 'Select'.
- Review the report notification email (this email will be sent to the assessee, if you chose to send the report themselves; otherwise it will come to you), then select 'Generate reports'.

The selected report(s) will be generated straight away and will appear in the 'View Generated Reports' project option within minutes. If you chose to have the reports sent to you, they will appear on the 'My reports' tab. If you chose to have the reports sent to the assessee, they will receive an email informing that the report is available for download.
If you would like to disable report generation emails for a project:

- From the main project page, select 'View project details' from the project options.
- Select 'Edit project details', then 'Edit project'.
- Deselect the 'Send report generation email' option.

This option can only be configured at project level (not user level) and will affect reports being sent to assessees as well as/or reports being sent to administrators.

Manual report generation for multiple assessees

- Select 'Projects'.
- Search for projects, in which the assessee has completed the assessment, then select the 'Project assessees' option from the 'Actions' drop-down menu.
- Select the 'Generate reports' link from the project options.
- Since you would like to generate the same reports for more than one person, select 'Group', then select 'Next'.
- Select the report(s), you would like to generate (hold down the 'Ctrl' key to select multiple reports), then press 'Select'.
- Select the relevant instrument (usually only one instrument available) for each report, then press 'Select'.
- Select the required norm group for each report, then press 'Select'.
- You will be presented with two report delivery options:
    - Send report(s) to participant – the assessees will be able to download their own report(s) from Oasys
    - Send report(s) to me – you will be able to download the report(s) from Oasys
- Select your preferred delivery option and press 'Find Matching Participant'.
- You will be presented with a list of eligible assessees in the project. You can select all assessees using the 'Select/deselect all' button (this must be done for each page view of assessees), or you can manually select multiple assessees using the buttons representing each assessee's name.
- Once you are satisfied with the list of assessees, select 'Configure emails'.
- Review the report notification email (this email is sent to the assessees, if you chose to send the report to them; otherwise it will come to you), then select 'Generate reports'.

The selected reports will be generated straight away and will appear in the 'View Generated Reports' project option within minutes. If you chose to have the reports sent to you, they will appear on the 'My reports' tab. If you chose to have the reports sent to the assessees, they will receive an email informing that the report is available for download.

If you would like to disable report generation emails for a project:

- From the main project details page, select 'View project details' from the project options.
- Select 'Edit project details', then 'Edit project'.
- Deselect the 'Send report generation email' option.

This option can only be configured at project level (not user level) and will affect both reports being sent to assessees as well as/or reports being sent to administrators.

Password Protection for Reports

This user guide explains how to password protect reports, so that users will be required to use the set password on the project to open the report either on the Oasys platform or if is sent as an attachment via mail.

- Select 'Projects'
- Select 'Project details' under Actions
- Select 'Generated Report Settings'
- Enter a password and select 'Save'
- The reports can now be downloaded and opened with the password. Users will also be required to use the password if the is attached to an email.
- If the password needs to be removed or changed, this is done via the same guide.

Generating Score Extracts

This user guide explains how to extract assessment scores from an Oasys platform.

Scores may only be extracted for assesses, who have completed the assessment task (with no resets), and for whom reports have been generated. Performance 360 and other multi-rater instruments cannot be extracted using the method below. Please contact support@savilleconsulting.dk for more information.

Getting started

- Select 'Projects'.
- Find the project, for which you wish to extract scores, and select the 'Project assessees' option from the 'Actions' drop-down menu.
- Select 'Extract Scores' from the project options. This link will only be available, if at least one report has been generated within the project; if not, the link will not be available.

Score extraction

- The score extraction page displays a list of the reports generated for the project, specifying the norm group used for each.
- The 'Generated Reports' column shows the number of assesses, for whom a particular report with a specified norm group has been generated.
- The 'Ungenerated Reports' column shows the number of assessees in the project, for whom a particular report, with a specified norm group has not been generated.
    - Please note: When a report is generated with a specified norm group for one candidate, this means that it is a possible report instance that can be generated for all the other candidates in the project. If that report instance has not been generated for any of the other candidates, this number will appear in the 'Ungenerated Reports' column against that report instance.

Generating a new score extract

- All report instances in the list are selected by default for score extraction. However, you can choose to deselect reports with specified norm groups as required.
- Select the 'Extract Scores' button, which will direct you to the Generated Extracts page.
- Your new extract will appear in the list, showing as 'In Progress'.

Accessing your score extract

- The time it takes for an extract to be generated will vary. When the score extraction has been completed, the person who generated the request will be notified by email. You can also refresh your page to check, if the extract has been generated.
- Once you have received the email notification, if you are no longer on the platform, you will need to log back in to Oasys and find the project you requested the extract for. Select 'Extract Scores' from the project options. Then select 'Generated Extracts' from the Score Extraction options.
- Any completed extractions will be displayed in the list with the status 'Complete'.
- Select 'Export to Excel' to download the scores extract to a .csv file, which can automatically be opened in Excel.

Availability of score extracts

- Score extracts will remain available for download on the 'Generated Extracts' page for seven days, after which it will no longer be displayed in the list.
- If less than a full day is remaining, '0 days' will be displayed in the 'Expires in' column.
- This page displays all the score extracts generated by all users for the project.
- Please note, that if an assessee has been reset, his or her scores will not appear in the extract, even if they have completed the reset task and had a report generated. If a project contains any resets, the following message will be displayed, when the 'Extract Scores' button is selected: "At least one report has been generated in this project for an assessment that has subsequently been reset; scores that have been reset will not be included in this extract."

The extract

There will be one row per assessee. The first set of columns will display any mandatory biographical information:

- Username
- Email address
- First name
- Last name
- User culture (this is the 'Preferred Language' entered, when creating a new user in Oasys)
- Any other mandatory biographical items

Report, instrument definition and norm set

After the biographical information, the report, instrument definition and norm set will be displayed. The instrument definition is the name and version of the assessment completed. Norm set is the norm group the responses have been compared to.

Date generated

This shows the date and time that the report was generated.

Scores

The scores displayed in the report that have been made available for extraction will be exported. At the end of the scale name is the type of score being displayed in that column.

Mixed reports and instruments

If there are a number of different assessments and report instances for an assessee, there would be one set of scores after the other separated by Report, Instrument Definition and Norm Set columns. If scores are not available for some assessees in the project, you will see their biographical information in the extract, but the rest of the row will be blank.

Generating & Sharing Group Overviews

This user guide explains how to generate and share a dynamic group overview from the Oasys platform.

Group overviews can only be generated for assesses, who have completed the assessment task (with no resets), and for whom reports have been generated. The reports must be generated against the same norm group except for Work Roles.

Getting started

- Select 'Projects'.
- Find the relevant project, for which you wish to generate a group overview, and select the 'Project assessees' option from the 'Actions' drop-down menu.
- Generate the reports for the assessees you wish to include in the group overview, if they are not already generated.
- If there are sufficient reports available for the group overview to be generated, a link will appear in the project options. Please see 'Minimum Number of Generated Reports' for further details.

Minimum number of generated reports

To view a group overview, a minimum of three reports needs to be generated for Wave and 10 reports for the aptitude assessment. Group overviews can be created for all aptitude assessments and for the following Wave reports: Focus Styles, Professional Styles, Leadership Impact, Leadership Risk, Work Roles, Sales and Building Resilient Agility.

Generating the group overview

- When you select the link to generate a group overview, you will initially be presented with the option to include assessees from additional projects.
- If this is not required, select 'No' to continue.
- If additional assessees are required from other projects, you will be presented with a list of projects that meet the criteria of having the necessary reports generated in them.
- Select the project(s) required.
- All assessees, who have the required reports generated for the group overview within the project(s), will be automatically selected by default.
- Deselect any assessees, whom you do not wish to include in the group overview.
- If assessees have had their reports generated against more than one norm group, an option will appear to choose the norm group to continue with for all selected

assessees. Once an alternative norm is selected, only the assessees, who have had their reports generated against the selected norm, will be available to be included.
- For a Work Roles Group Overview only: If assessees have had their report generated against more than one norm group, a drop-down option will appear in the 'Normset' column to select the appropriate norm for each assessee. Assessee's reports with different norms can be included.

Viewing Overviews in different languages

The language drop-down menu allows the group overviews to be viewed in any one of the available report languages. This is independent of the language(s) the individual reports may have been viewed in.

Please note, that translations will be provided for a group overview, wherever the relevant individual report is translated.

Sharing group overviews

Group overviews can be shared with other people, who are not on Oasys.

To do this, first follow the previous steps to generate the group overview, you wish to share.

Sharing the group overview

- Navigate to 'My reports'.
- Select 'My group overviews'.
- You will be presented with a list of all the group overviews that you have previously created.
- Select the 'Share group overview' option from the ‘Actions’ column to set up a shared group overview link.
- On the following page, you will be asked to create a name for the shareable link, then select 'Create'.
- The table will display a list of all shared links for the group overview.
- Selecting the hyperlink will automatically copy it to your clipboard for you to share via your chosen method, e.g. via email.
- All links will expire after 30 days.
- Links can also be disabled/re-enabled using the button in the 'Actions' column.
- Disabling the link will stop anyone, to whom the link has been sent, from being able to access the data.
- This functionality also allows you to send out the link to someone in advance and then enable it at a time, when you want the recipient to view the data.

- The link will per default be in English. There is an option to change the language in the group overview.

Anonymisation

- All group overviews shared via these links are anonymized for security reasons.
- To view individual assessee details, please view the group overview directly from the Oasys platform.

Adding Project Users to Existing Projects

This user guide explains how to add project users to an existing project. This allows multiple project users to access a project, manage a project between them and view reports generated within the project.

- Select 'Projects'.
- Find the relevant project, then select the 'Project details' option from the 'Actions' drop-down menu.
- Select the 'Edit project users' link from the project options.
- Find the user by searching for his or her first name, last name, email address or username.
- Add the person as a user to the project by selecting the 'Add user to project' button.
- Repeat for additional project users.
- To remove a project user, select the 'Remove user' button.
- Project users with a lighter shaded button next to them cannot be added or removed.

Please note, that project administrators can only add report viewers to a project. System administrators can add other system administrators, project administrators and report viewers to projects.

Report Viewer User Role

Report viewer

The 'Report Viewer' user role is one of the administrator-level roles in Oasys. It has been created to allow users to access generated reports, whenever it is convenient for the user and in any language available, as well as extract scores without needing to have project administrator access rights or higher.

The Report Viewer user is able to:

- view all the projects they have been added to
- view all assessees in these projects and their completion status
- access generated reports and download them in any language available (there is no extra charge for downloading in additional languages)
- extract scores

The user will be unable to:

- generate reports
- add assessees to projects or send reminders to complete tasks
- create new projects

Accessing Reports

If auto-reporting is configured, the report viewer will start receiving notification emails, when assessees complete their assessments, but only from the point they are added to the project as a Report Viewer. The generated reports will appear on the Oasys homepage (Unread reports view) and the My Reports page.

If auto-reporting is not configured, or if reports are generated before the Report Viewer is added to the project, these reports can still be accessed by viewing the project and selecting the 'View generated reports' link. This also applies, if reports are manually generated.

Report viewer – Oasys pages

Homepage

The homepage lists all projects the user has been added to and can switch view to see all unread reports. Once reports have been read, they will still appear under My reports.

Projects

The Projects page lists all projects you are added to as a Report Viewer. From here you can:

- view the project and see how many participants there are in the project and their completion status
- search by first name and/or last name to find assessees
- view project details
- view generated reports
- download generated reports in any available language
- create score extracts
- create project extracts (which detail the status of all assessees within the project)

My details

This page is the same for any Oasys administrator.

My reports

Any read and unread reports will be listed under My reports.

Report viewer – user creation

The 'Administrator' tab allows project administrators and system administrators to create new Report Viewer users.

Creating a new user:

- Go to the 'Administrator' tab.
- Select the 'Create administrator' link from the options.
- Enter the required user details and select the 'Create' button.

When creating a new administrator, by default the 'Project Administrator' level user role and the 'Active' status are selected.

When creating a report viewer, select the 'Report Viewer' user role instead.

Each user can only have one role associated. A higher-level role will encompass the access rights of all the administrator roles below it (apart from assessee). Please refer to the user guide 'Administration of Users' for more details on, what all other roles can do.

Adding a report viewer user to a project

The same process applies here, when adding project users to existing projects in Oasys. Please refer to the user guide 'Adding project users to existing projects' for more details on how to do this.

Erasing an Assessee

This user guide explains how to erase a single assessee from the Oasys platform. This functionality is only available to users with System Administrator rights or higher on the Oasys platform.

In order to process the request to manually erase an assessee, the assessee must not have any active assessments linked to them.

Getting started

- Select 'Assessee'.
- Find the relevant assessee, you wish to erase, then select the 'Details' option from the ‘Actions’ drop-down menu.

If the assessee does not have any assessments linked to them:

- Select 'Erase user'.
- A message will appear to confirm, that the request has been received.
- If the assessee is still appearing in the Users list for a short period of time, you will be reminded, that the assessee is due to be erased.

If the assessee has an assessment(s) linked to them:

- If there are any outstanding assessments for the assessee, you will need to erase these first, before you can erase the assessee.
- Select 'View details for the assessment'.
- Select 'Erase assessment'.
- Once the assessment(s) has been erased, the assessee can be erased following the same process above for assessees with no active assessments linked to them.

360 Assessment

Step 1: Create project

- Select 'Projects'.
- Select the 'Create new project' link from the project options.
- Enter the project name and description, the purpose and role level for the project and a PO reference number if required.
- Select 'Next'.

Step 2: Add assessment

- Add the relevant 360 assessment, you require, from the 'Instruments available for this project' list by selecting the 'Add instrument' button.
- If you need to remove an instrument from your selection, select the 'Remove instrument' button. Your selection of instruments is located below the list of available instruments. Please note, that it is not possible to add or remove instruments from a project, once you have finished the creation process; it is crucial to select the correct instrument(s) at this stage.
- Once you have selected the required instruments and languages, select 'Create project'.

Step 3: Configure email templates

At this point your project is set up. Five email templates are automatically added to the project, which you will need to review and configure accordingly:

- Select the 'View project details' link from the project options.
- Select the 'Edit project emails' link from project options.
- Select the ‘Edit template’ button next to the template you wish to review.
- After making changes to a template, select the ‘Save’ button at the bottom of the page to temporarily save the edits you have made and continue to review the other templates.
- Once you are satisfied with all the email templates, select the ‘Save’ button to permanently save the changes. These changes will appear for new assessees added to the project.
- Click save twice.

There are five templates, which may require configuration depending on the assessments within your project:

- Assessee Invite: Project invitation email for the assessee/focus person to complete assessment
- Rater Invite: Project invitation email to raters
- Report: Report generation notification
- Assessee Reminder: Reminder email for the assessee/focus person
- Rater Reminder: Reminder email to raters

Please note: It is important that you do not remove or amend the $$$ signs, as these indicate dynamic (runtime) fields that will be automatically populated by Oasys.

For further information on editing email templates, please refer to the user guide 'Editing email templates'.

Step 4: Add focus person/raters

- Select 'Assessee' followed by 'Create assessee'
- Enter the required user details and select 'User Created' followed by the 'Create' button. As soon as you select 'Create', they will automatically receive login details.
- Repeat for all raters/focus person.

Step 5: Add focus person/raters to 360 project

Remember! Always start by adding the focus person, as the first person added automatically will be included as the focus person. The other raters can be added to the relevant rater categories.

- Select 'Projects'
- Find the project and select 'Project assessees' from the drop-down menu 'Actions'.
- Select 'Add assessee'.
- Search for the focus person and select 'Add user'. The focus person will then automatically receive an invitation email.
- Select 'Configure raters' to add all raters.
- Select 'Add' for each rater category followed by 'Add participant'.
- Repeat for each category and complete the process by selecting 'Save assessment'. All raters will then automatically receive an invitation email.

Step 7: Generate report

When you want to generate the 360 report, it can be done by following the guide 'Manual report generation'.

Frequently Asked Questions

How do I edit the email address of an assessee I have created in a project?

Instead of changing the email address of an assessee, who has been created with a wrong email address, the assessee is to be deactivated. Please refer to 'Deactivating or transferring an existing user'. Hereafter, you can create an assessee by following this guide, 'Send test link'.

How do I reset an assessment for an assessee?

If you have been contacted by an assessee, who wants to have their assessment reset, see 'Reset assessments'.

Why don't I get any reports, when the assessee has completed an assessment?

Oasys only generates reports automatically, if automatic reports have been generated in the project, in which the assessee has been added. If the assessee has completed the assessment before the automatic reports have been generated, the reports need to be generated manually.

Follow these instructions to generate automatic reports and then manually generate the reports for assesses, who have already completed the assessment(s):

Generate reports automatically

Generate reports manually

Why is my project missing from the overview?

Oasys continuously ensures that projects that have not been used for a long time are automatically closed, depending on the specified anonymization period. If this is the case, a new project must be created by following the guide 'Create project'.

How do I resend username and password?

If an assessee/administrator has received the invitation email, but has not received or cannot find the email with username and password, you can send an email with the username and a new password, see 'Send login details / new password'.

How do I download reports from a colleague’s project?

If you have system administrator rights, you can download reports from other administrators’ projects.

- Select ’Projects’.
- Search for the project and then select ‘Project assessees’ in the drop-down menu ‘Actions’.
- Select ‘View generated reports’.

How do I change the name or description for a project?

- Select ’Projects’.
- Search for the project and then select ‘Project assessees’ in the drop-down menu ‘Actions’.
- Select ‘View project details’.
- Select ‘Edit project details’.
- After potential editing, select ’Save changes’.

Saville
assessment

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