Saville Assessment
Willis Towers Watson

Saville Assessment Oasys Quick Guide

Creating a Project with Invited-Access Assessments

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This quick 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).

For information on administering supervised assessments, see quick guide '**Creating a Project with Supervised-Access Assessments**'.

Creating a New Project

There are five steps to creating a project:

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

1. Name, Description, Purpose, Role Level and Deadline Details

- Log in to the platform and select 'Projects'.
- Select the 'Create New Project' link from the Project options.
- Enter the project name and description, and a PO reference number if required. Please note the project name will appear in emails sent to the assessee.
- Select 'Next'.

2. Add Instruments

- Add the instruments 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 it is not possible to add or remove instruments from a saved project; it is crucial to select the correct instrument(s) at this stage.
- Once you have selected the required instruments, select 'Create Project'.

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. To access the email templates you will need to review, please see the quick guide titled '**Editing Email Templates within a Project**'.

Please Note: It is important you do not remove or amend the $$$ signs as they are runtime fields and will be automatically populated by the platform.

There are five templates which may require configuration:

Assessee Invite	Project invitation email for the assessee to complete assessments
Rater Invite	Project invitation email to raters for Performance 360 or Job Profiler assessments
Report	Report generation notification
Assessee Reminder	Reminder email for the assessee to complete assessments in a project
Rater Reminder	Reminder email to raters to complete assessments in Performance 360 or Job Profiler projects

4. Configure Reporting

If you would like to manually generate reports after assessees have completed assessments, you can do so by selecting the 'Generate Reports' link from the Project options. For more information on manual reporting, please see quick guide '**Manual Report Generation**'.

If you would like reports to generate automatically as soon as assessees have completed the assessments, please follow these steps:

- Select the 'Configure Automatic Reporting' link from the Project options.
- Select the 'Add Reports' button.
- Select the report(s) from the list – *Please note 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 who to make the reports available to via the My Reports area – administrators, or assessees 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.

5. Add Assessees

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

To add an existing assessee

- Select the 'Add Assessee' from the Project options.
- Find the assessee by searching for their first name, last name, email address or username.
- Add them to your list of added assessees using the 'Add user' button.
- When an assessee has been successfully added to the project, a green tick will appear by their details ✔.
- Repeat for all assessees required.
- Once you have selected the existing assessees 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 password so will not be sent a new one.

The assessee may not remember their username and password. For information on how to resend login details, please refer to the '**Resetting User Passwords**' section in the '**Managing Oasys Users**' quick guide.

To create a new assessee

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

1. **Create a new individual assessee**
   - Select the 'Create and add Assessee to the Project' link from the Project options.
   - 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 them as an assessee and add them 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 assessees required.

2. **Create multiple assessees via bulk upload**
   - Select the ‘Asseesee Upload’ link from the Project options.
   - Select ‘New Assessee Upload’.
   - Select the required email template that will be sent out to assessees 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 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.
   - Select ‘Upload’ to create them as assessees and add them to your project.
   - As soon as the ‘Upload’ button is pressed, both the login details emails and the invitation emails will be automatically sent in the chosen language.
   - You will be returned to the previous page where you will be shown all Assessee Upload Requests for that project.

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