

Saville Assessment

Willis Towers Watson 



Saville Assessment Oasys Quick Guide

Creating a Project with Supervised-Access Assessments

Creating a Project with Supervised-Access Assessments

This quick guide explains how to create projects using 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
6. Launch Assessment(s)

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 page Project options.
- Enter the project name and description, plus a PO reference number if required.
- Select 'Next'.

2. Add Instruments

- Add the supervised-access instrument(s) (marked SA) you require from the 'Instruments Available for this Project' list by selecting '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

This step is more applicable to invited access projects. As the emails will not be sent to the assessees, our standard email content should not need any amending.

4. Configure Reporting

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

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

- Select the 'Configure Automatic Reporting' link from the Projects 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.

- Reports can be made to be available via the My Reports area for administrators only for Supervised assessments and cannot be made available for assessees to access within the platform (this is only available for Invited Access assessments).
- 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 Assesseees

Having created and saved the project, you can now add assesseees to the project.

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' button 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 assesseees 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 assesseees required.
- Once you have selected the existing assesseees you require, select 'Return' at the bottom of the screen.

To create a new assessee

The following steps detail two ways of creating new assesseees 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.
- Repeat for all assesseees required.

2. Create multiple assesseees via bulk upload

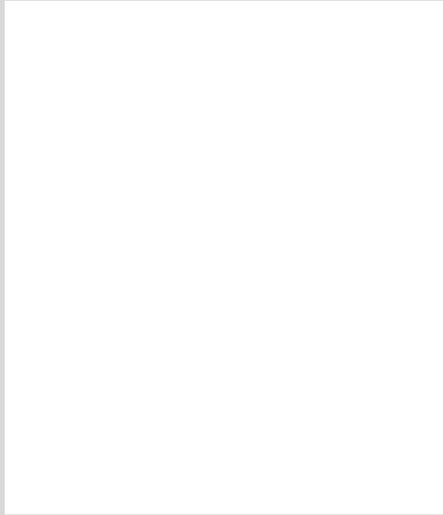
- Select the 'Assessee Upload' link from the Project options.
- Select 'New Assessee Upload'.
- Select the required email template (this will not be sent out to assesseees), and the language (only languages that are available on your platform will be in this list). This language will become the assessee's preferred language. 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 assesseees and add them to your project.
- You will be returned to the previous page where you will be shown all Assessee Upload Requests for that project.

6. Launch Assessment(s)

When you are ready to start your supervised assessment session you will need to return to 'My Tasks'.

- Select 'Supervised Projects' in the drop down and select the 'Switch view' button.
- Select the 'View assessee for project' button
- To launch the assessment select 'Start Assessment'
- A landing page will be presented with the assessee's name at the top of the page and a 'Start Assessment' button, where the assessee can then take over on the device and select the button when they are ready to start.

For further support and advice on how to manage supervised projects, please refer to the supervised project administration instructions.



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Our mission is to transform assessment around the world. We enable organizations to identify potential, accelerate performance, and achieve outstanding results. Our portfolio of leading-edge assessments are designed based on extensive research into successful workplace performance and the critical relationship between motive, talent and workplace culture. With representatives in over 80 countries we are transforming how organizations Hire, Build and Lead their talent globally. Learn more at www.savilleassessment.com