

Saville Assessment

Willis Towers Watson 



Saville Assessment Oasys Quick Guide

Managing Existing Projects

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This quick guide gives 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 their own quick guides.

Additional assessees, can be added to an existing project at any time. However, we recommend that you check that the reports 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 appropriate 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.

- Log in to the Oasys platform and select 'Projects'.
- Search for the project, then select 'View Project Details'.
- Select the 'Configure Automatic Reporting' link from the Project options.
- Remove any unwanted reports by selecting 'Please select to remove'.
- 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, see quick guide '**Creating a Project with Invited-Access Assessments**' or '**Creating a Project with Supervised-Access Assessments**'.

Editing Instrument Languages for Existing Projects

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

- Log in to the Oasys platform and select 'Projects'.
- Search for the project, then select 'View Project Details'.
- Select 'View Project Details' from the Project options, then select 'Edit Project'.
- Select 'Edit Languages' against each 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 dates.

- Log in to the Oasys platform and select 'Projects'.
- Search for the project, then select 'View Project Details'.
- Select 'View Project Details' from the Project options, then select 'Edit Project'.
- Select 'Edit template' next to the invitation email template, review and then select 'Save Changes'.
- Repeat the previous step for the other email templates.
- Once you are happy with all three templates, select 'Save'. These changes will appear for new assessees added to the project.

Please Note: The \$\$\$ signs and text within these signs are dynamic runtime fields that are automatically populated by Oasys. Amending or removing any of this text will stop particular information from being populated.

There are five types of project specific email template.

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

Checking Assessee Status

- Log in to the Oasys platform and select 'Projects'.
- Search for the projects, then select 'View Project Details'.
- If there are more than 50 assessees, find assessees by using the search boxes, or browse using the arrows at the foot of the page.



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

- 'Created' means the assessee has not started.
- 'Started' means they have partially completed their assessments.
- 'Completed' means 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, see quick guide '**Sending Reminder Emails**'.

If you need to send 50 or more reminder emails, please contact the Saville Assessment support team who can organize a bulk reminder email.

Viewing Generated Reports

All reports which a project user has generated are permanently stored on the 'My Reports' tab. However, when managing a project, it is sometimes useful to be able to see all the reports generated within it.

- Log in to the Oasys platform and select 'Projects'.
- Search for the projects, then select 'View Project Details' .
- Select '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.

Generating Additional Reports

Any additional reports required from an assessment can be manually generated. For more information, see quick guide '[Manual Report Generation](#)'.

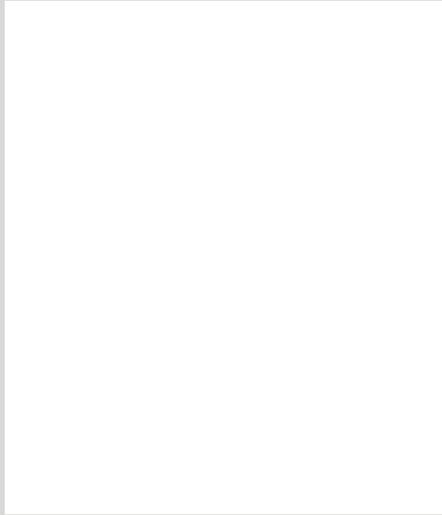
Editing Project Name and Description

- Log in to the Oasys platform and select 'Projects'.
- Search for the projects, then select 'View Project Details'.
- Select the 'View Project Details' link from the Project options, then select 'Edit Project'.
- Once you are satisfied with the name and description, select 'Save Changes'.

Adding Project Users to Existing Projects (System Administrator access rights or higher)

This is for users with system administrator privileges or higher. It 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.

- Log in to the Oasys Platform and select the 'Projects' tab.
- Search for the projects, then select 'View Project Details'.
- Select the 'View Project Details' link from the Project options, then select 'Edit Project Users'.
- Find the project user by searching for their 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.



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