

Saville Assessment

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# Saville Assessment Oasys Quick Guide

Managing Oasys Users (for Saville Assessment Partners)

# Managing Oasys Users

## (for Saville Assessment Partners)

This quick guide explains how to manage users (including administrators) on Oasys, in particular how to create and deactivate users.

### User Roles

There are five user roles on Oasys: Client Administrator, System Administrator, Project Administrator, Report Viewer and Candidate. The list below shows the rights that each role has on Oasys, starting from the highest level to the lowest.

#### 1. Client Administrator

- Create and edit projects
  - Edit charging details (apply demo charge code for marketing credits)
- View and generate reports
- Extract scores
- View group overviews
- Create users in one of these roles: Client Administrator, System Administrator, Project Administrator, Report Viewer, Candidate
- View all candidates and projects created by administrators of all levels
- Add other administrators (of all levels) to existing projects
- Has access to the 'Organization' tab
  - Manage email configuration
  - Manage email templates
  - Manage clients
  - Edit configuration

#### 2. System Administrator

- 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, Candidate
- View all candidates and projects created by administrators of all levels
  - However, has no right to edit the details of a Client Administrator user
- Add other administrators (up to the system administrator level) to existing projects
- Has access to the 'Organization' tab
  - Manage email templates

### 3. Project Administrator

- Create and edit projects
- View and generate reports
- Extract scores
- View group overviews
- Create users in one of these roles: Project Administrator, Report Viewer, Candidate
- Can only view projects and candidates they have created and reports they have generated, unless they have been added to a project created by another System Administrator (for further information, see quick guide '**Adding Project Users to Existing Projects**')
- Has no access to the 'Organization' tab

### 4. Report Viewer

- View generated reports
- Extract scores
- View group overviews
- Can only view projects, candidates and reports that have been generated for the projects they have been added to by another administrator (for further information, see quick guide '**Adding Project Users to Existing Projects**')
- Has no access to the 'Organization' or 'User' tabs

### 5. Candidate

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

It is important that there is someone within your organization who has Client Administrator rights to each of your clients' Oasys platforms (in order to manage email configurations and templates etc.). If this is not the case, please contact [bureau.manager@savilleassessment.com](mailto:bureau.manager@savilleassessment.com).

## Creating a New User & Managing an Existing User

The 'Users' tab allows administrators to create new users and manage existing ones.

### Creating a new user:

- Go to the 'Users' tab.
- Select the 'Create New Candidate' or 'Create New Administrator' link from the page options menu.
- Enter the user details and select the required user role.

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

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

To create a new Client Administrator or System Administrator, the user needs to be created as a Project Administrator first, then their role can be changed to a higher level via the 'Users' 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 Candidate).

Please note that once a user has been created, their role cannot be switched between a candidate and an administrator. That is, a candidate cannot be changed to be an administrator and an administrator at any level cannot be changed to be a candidate. A new user will need to be created in this case.

Client Administrator, as the highest-level administrator, is able to change the role of an administrator among these four: Client Administrator, System Administrator, Project Administrator and Report Viewer. Similarly, System Administrator, at the next highest level, is able to change the role of an administrator between System Administrator, Project Administrator and Report Viewer.

### Managing an Existing User:

- Go to the 'Users' tab.
- Search for the user required.
- Select the 'View details for user' button.
- If you wish to change any details, select the 'Edit' button.
- When you have finished making changes select 'Save'.

## Deactivating or Transferring an Existing User

If an administrator no longer works for the organization or manages projects on Oasys, there are two approaches to managing this user's account. The choice of approach depends on how the organization wishes to keep an audit trail of their projects.

### Deactivating an Existing User

Deactivating a user prevents them from logging in to the Oasys platform with their username and password, and accessing data.

A user can be deactivated by changing their status from 'Active' to 'Inactive' via the 'Users' tab.

If you wish to anonymize the user being deactivated please see quick guide '**Manually Erasing an Assessee**'. Please note, the anonymization process cannot be undone.

#### Deactivating an Existing User:

- Go to the 'Users' tab.
- Search for the user required.
- Select the 'View details for user' button.
- 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 the status from 'Inactive' to 'Active'. Once their status has been updated, the user will regain access and all the rights they 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.

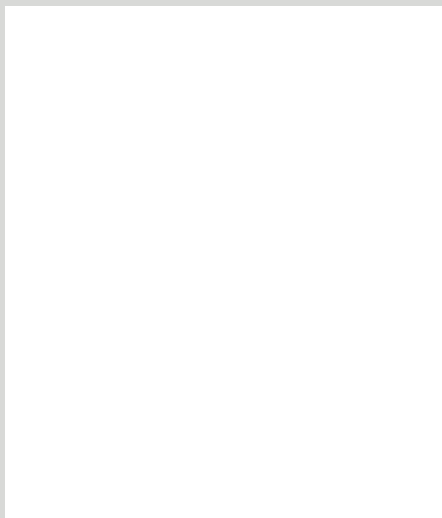
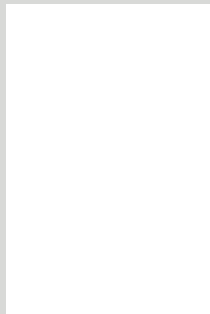
If a new Project Administrator is to be created and requires access to certain existing projects, they can be added to individual projects by a System Administrator (for further information, see quick guide '**Adding Project Users to Existing Projects**').

### 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 updating the email address to prevent the previous administrator from gaining access through requesting a new password.

An advantage of transferring the administrator to another individual is that the individual will receive any of the auto-report notifications that have been configured for existing projects, that is, they will be notified when a candidate has completed an assessment.

If the previous administrator is a Project Administrator, the organization may want to decide whether to deactivate or transfer the user, taking data protection and Oasys project management into consideration.



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