Saville Assessment
Willis Towers Watson

Saville Assessment Oasys Quick Guide

Oasys Introduction

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

My Tasks

The 'My Details' page is the first page the user sees. 'My Tasks' is the first page that will be displayed). 'My Tasks' is used to manage invited-access assessments, supervised-access projects and new assessment reports.

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.

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

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.

Supervised Projects

This lists all projects the user has created with supervised-access assessments. For more details, please see quick guide '**Creating a Project with Supervised-Access Assessments**'.

Organization

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

Manage Email Templates

This link allows the user to review the master email templates for the Oasys platform. Further information on this is provided in the quick guide '**Editing Platform Master Email Templates**'.

Projects

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

Projects are listed alphabetically by ‘Project Name’. Page navigation and multiple search fields 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 been set-up initially)
- Add existing assessees /create and add new assesses to a project
- Check assessment completion status
- Edit project specific email templates
- Send reminder emails
- Configure / re-configure automatic reporting
- Generate reports manually
- Generate Group Overviews
- Reset assessee assessments
- Extract scores
- Close Projects
- Archive Projects (Bureau Team or Client Administrator roles only)

For more information, see Oasys quick guides:

- Creating a Project with Invited-Access Assessments
- Creating a Project with Supervised-Access Assessments
- Editing Email Templates within a Project
- Generating Group Overviews
- Generating Score Extracts
- Manual Report Generation
- Resetting Assessments
- Sending Reminder Emails

My Details

The ‘My Details’ tab allows the user to review their 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 view or 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 quick guide "Generating Group Overviews".

All reports generated for any project created by a specific administrator, whether manually or automatically, are permanently stored on the 'My Reports' page. The reports are displayed in chronological order, with the most recent at the top of the list. Page navigation and multiple search fields 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 that are available on your platform.

Downloading a Report

- Go to the 'My Reports' tab.
- Find the report you require 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.
- Select either the 'Open' or 'Save' option.

Users

The 'Users' tab allows administrators to create new users and manage existing ones; this can be either assessees or administrators 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 quick guide '**Managing Oasys 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 the same person.

If you need to de-activate a user (if they no longer work for the organization, for example), this can be done by changing their status to 'Inactive'.

Creating a New Candidate

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

Creating a New Administrator

- Go to the 'Users' tab.
- Select the 'Create New 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 an Existing User

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

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