

PSYTECH GeneSys

Unit Four: Generating Reports

Unit Four: Objectives

Generate Reports From Respondent Results

- Minimum Requirements for Reporting
- Credits
- Report Sets
- Generating Reports for Individual Respondents
 - The Report Wizard
 - The Notification Area & Downloading Reports
- Generating Reports for Multiple Respondents
- The Respondent Screen & Assessment History

Minimum Requirements for Reporting

Reports generated by Psytech GeneSys are produced mainly in Microsoft Word (.Doc) format, however Adobe PDF's and Microsoft Excel are also used for some reports, therefore suitable document readers will be required to open these reports. Local permissions may also need to be set in high security systems to allow the download of these files from to the local computer.

Finally, batches of reports are produced and then zipped. Most modern operating system can open zip files natively, however if you do not have access to this feature a zip utility will be required.

Credits

All testing activity, such as adding respondents, sending invitations or testing locally are all free within Psytech GeneSys. The only point of payment is at the time of requesting reports for a completed assessment.

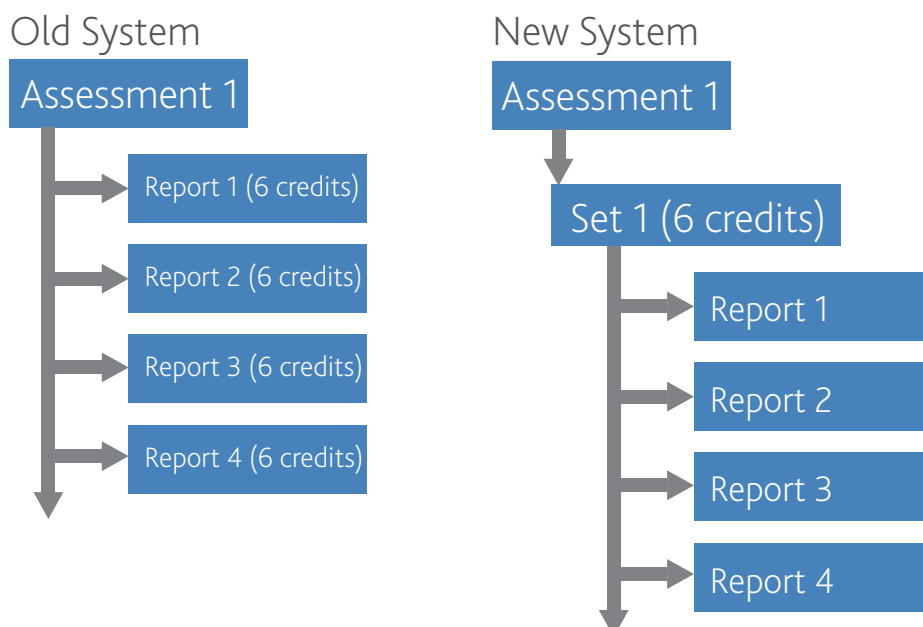
Psytech GeneSys operates on a pre-purchased credit based system. A balance of credits is maintained within each user account and a set number are deducted at the point of requestig a report. The number of credits deducted will vary depending on the assessment and report set requested.

Report Sets

The new Report Set cost model offers huge advantages over the old pay-per-report model.

Psytech now bundle reports for an assessment into a Set, and this set is given a credit price. When scoring a respondent result you are offered the entire set of reports for one price and you are free to choose which of the reports you want from within the set.

Additionally, once you have scored an assessment for a respondent and paid for the set then that scored set is free in the future. You can re-request previously generated reports or select new reports from the set you have previously not used all for free.



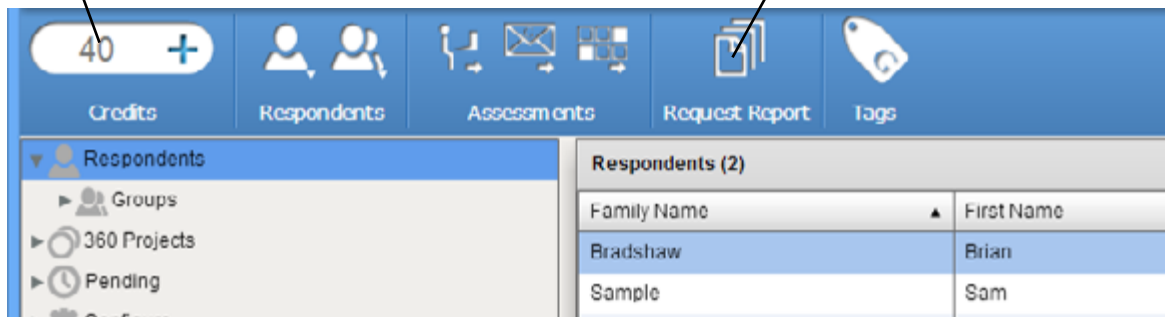
Generating Reports for Individuals

Once an assessment is complete select the respondent you wish to generate a report for from the main respondent list, or from within a group. Once the respondent is highlighted, click on the Request Report button in the “Request Report” section of the main Toolbar.

The Request Report button will only become active when there are results available for a respondent.

Current Credit Total

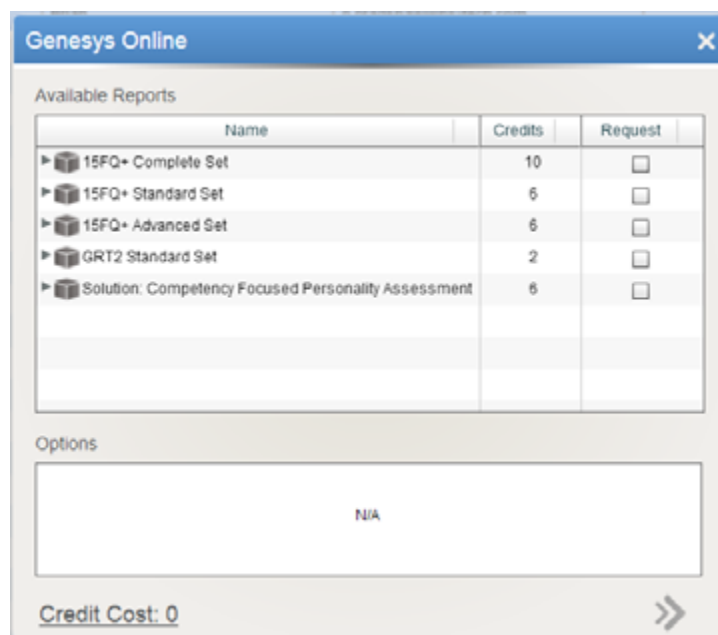
Request Report



The Report Request wizard will not open listing all report options that are available for the tests completed for the respondent. In the image below the respondent has completed 15FQ+ and the GRT2 battery. This means that the available report options are:

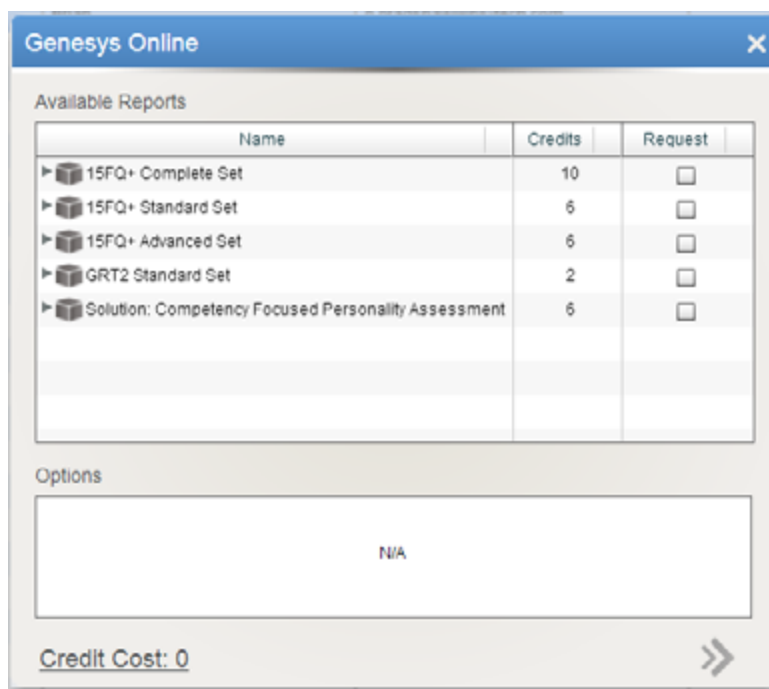
- The 15FQ+ Complete Set
- The 15FQ+ Standard Set
- The 15FQ+ Advanced Set
- The GRT2 Standard Set

There is also a solution report available which are non-expert reports aimed at development, recruitment or selection on a given solution based area. These will be covered in separate tutorials.

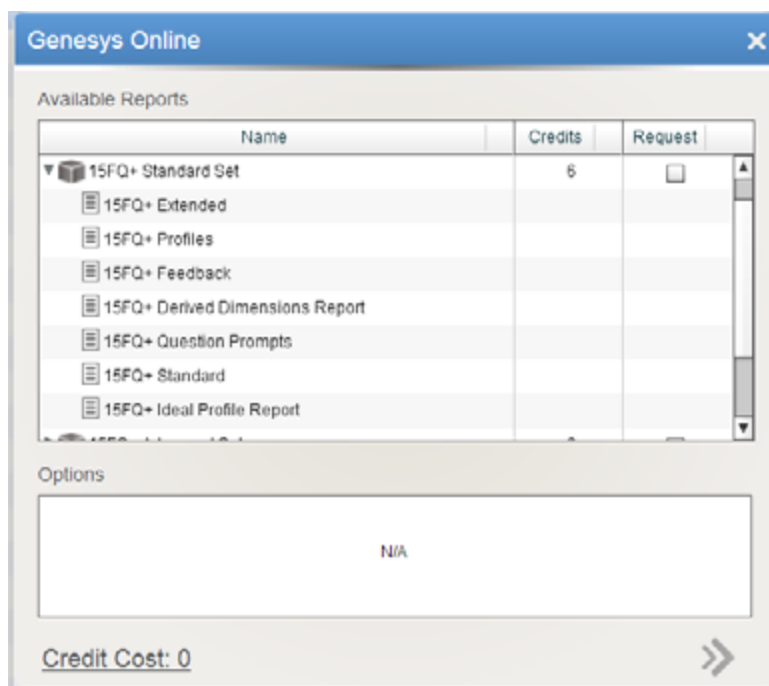


The Report Wizard

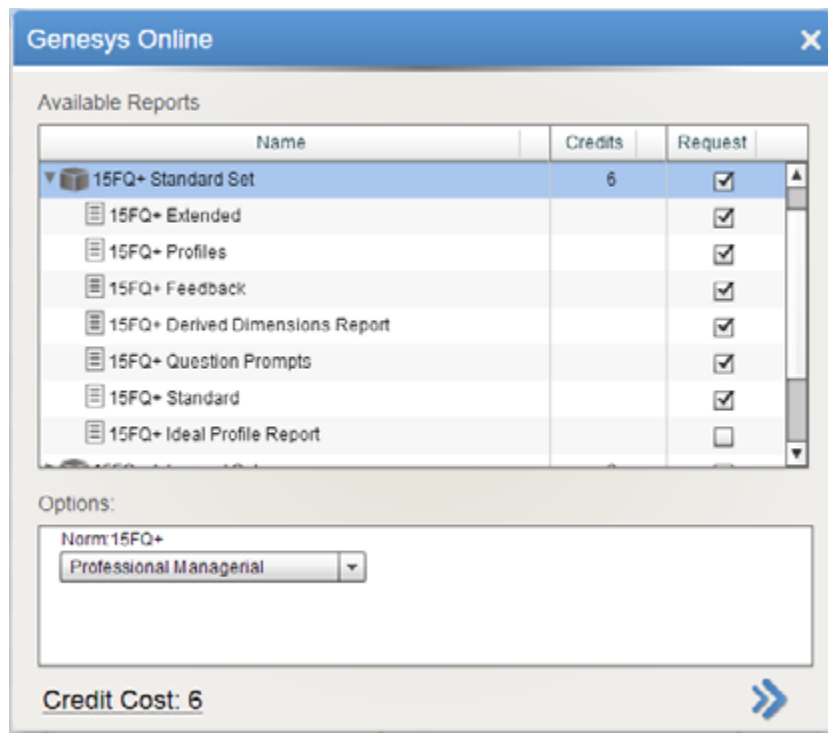
The report wizard shows you all available report options available for a respondent based on the assessments completed by that respondent. When the wizard first opens it will display a list of Report Sets and the price of the set in credits.



To view the contents of a set, click on the arrow next to the Set icon. This will then expand the set showing you all the reports you can select from within the set.

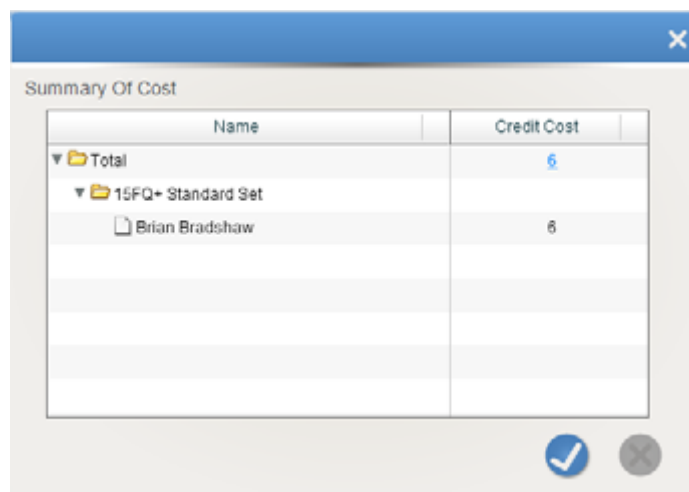


To select a set click Request check box next to the set. The set will then expand, if this is the first time you have selected this set all report options will be ticked by default. Meaning you can request all reports at once from within the set. If you do not wish to download all the reports at this time, remove the tick from the reports you do not wish to generate. Removing reports will not affect the set price. Removed reports can be generated for free in the future if you wish to generate them at a later date.



Once you have selected a set, if there are any set related options, such as the norm group or ideal profile to use, these will appear in the Options area. Make your selections here before continuing.

Once one or more sets are selected the Credit Cost will be updated. To see a summary of how the credit cost for the set(s) was calculated, click on the Credit Costs total and a new window will open displaying how this total was reached. This can be helpful when requesting sets that have previously been paid for, especially when dealing with multiple respondents.



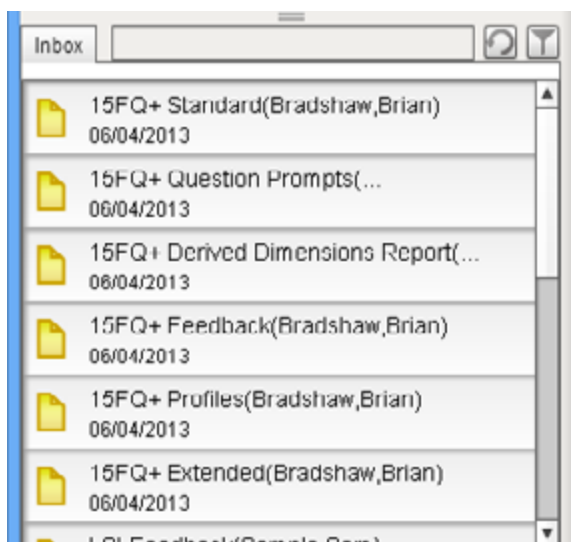
Once you have selected the Report Sets and reports, and selected your norm options if necessary click on the forward arrow to complete the request.

You will then be re-directed to the Pending Report Request screen where you can watch your reports being generated.

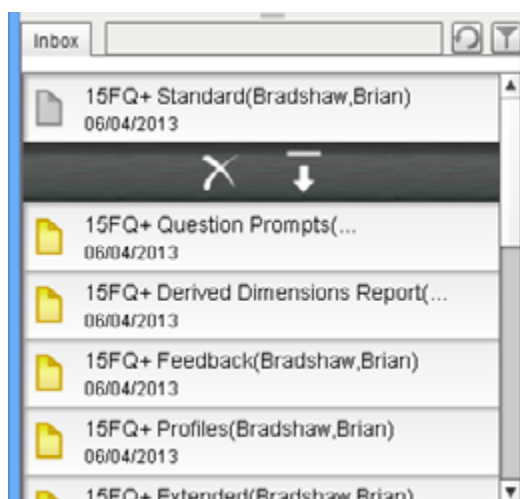
As they are generated they will be removed from the pending list and placed in the Notification Inbox.

The Notification Area & Downloading Reports

Generated reports will be placed in your Notification Inbox for download. A new notification will be highlighted, once you have clicked on it then the highlight will be removed to signify that you have read the notification.



Clicking on a notification will expand the notification action pane. For reports you are offered two options, to delete the notification (not the report) or to download the report. By clicking the download button will trigger the browser you are using to use its default download routine allowing you to save the report locally on your computer.



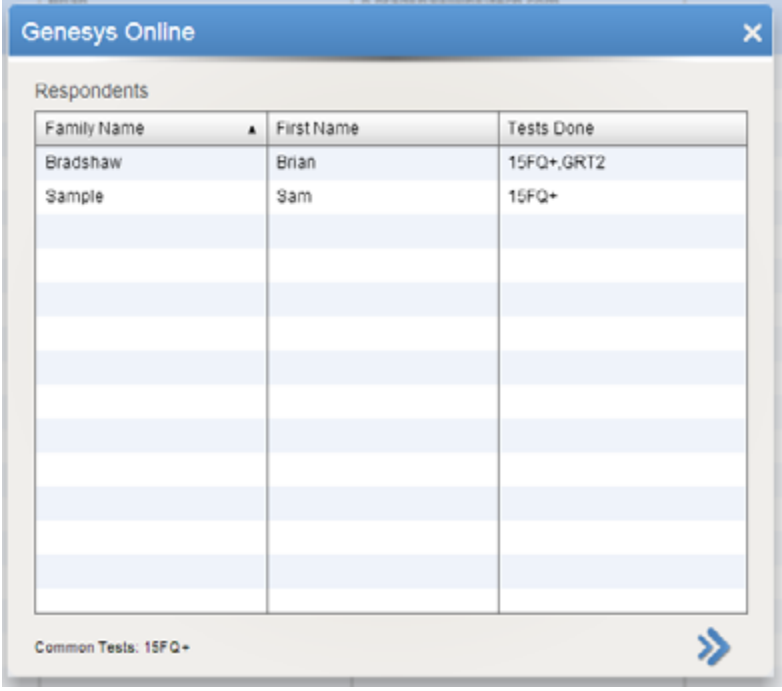
Generating Reports for Multiple Respondents

Select all of the respondents you wish to generate a report for. All of these respondents should have completed at least one common test or this option will not be possible. Once selected click the Request Report button.

A summary screen will open displaying your respondents, and the tests that they have in common. If respondents don't have tests in common you will not be able to move beyond this screen until you have removed them from the list.

To remove respondents from the list drag and drop them outside of the summary screen.

In the image below one respondent has completed the 15FQ+ and the GRT2 battery, while the other has only completed the 15FQ+. Therefore they have the 15FQ+ in common, so only this test can be used to generate reports at the moment.



The screenshot shows a window titled "Genesys Online" with a close button (X) in the top right corner. Below the title bar is a section labeled "Respondents" containing a table with three columns: "Family Name", "First Name", and "Tests Done". The table has two rows of data. The first row shows "Bradshaw" as the family name, "Brian" as the first name, and "15FQ+,GRT2" as the tests done. The second row shows "Sample" as the family name, "Sam" as the first name, and "15FQ+" as the tests done. Below the table, there is a status bar that says "Common Tests: 15FQ+" and a blue double arrow button pointing to the right.

Family Name	First Name	Tests Done
Bradshaw	Brian	15FQ+,GRT2
Sample	Sam	15FQ+

Common Tests: 15FQ+

Click the forward arrow to continue to the Report Wizard, and then follow the same instructions to request your reports as was outlined for individual respondents.

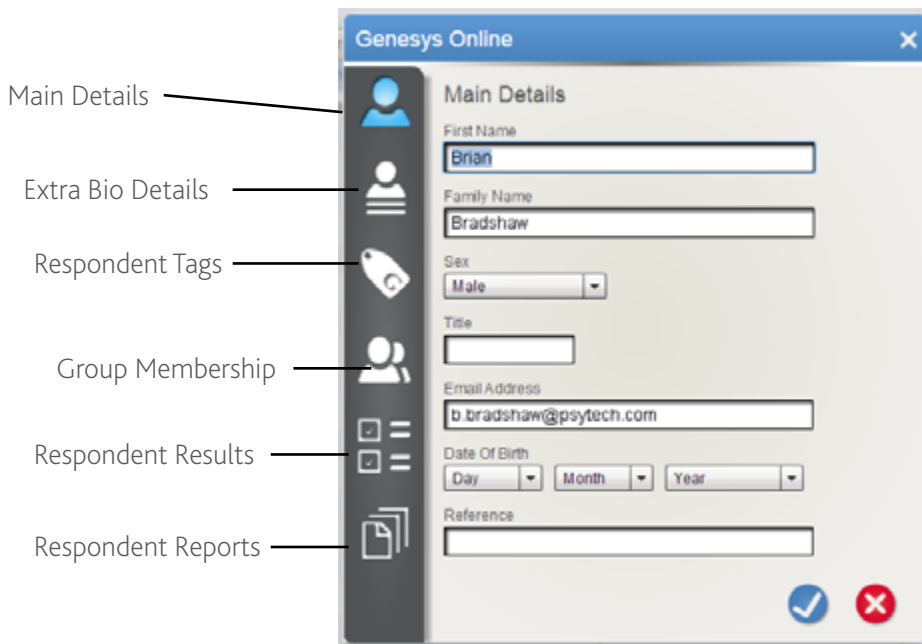
The Respondent Screen & Assessment History

At any time you can view a respondents' assessment history and access reports generated for them in the past, or request for them to be generated again using a different norm for example.

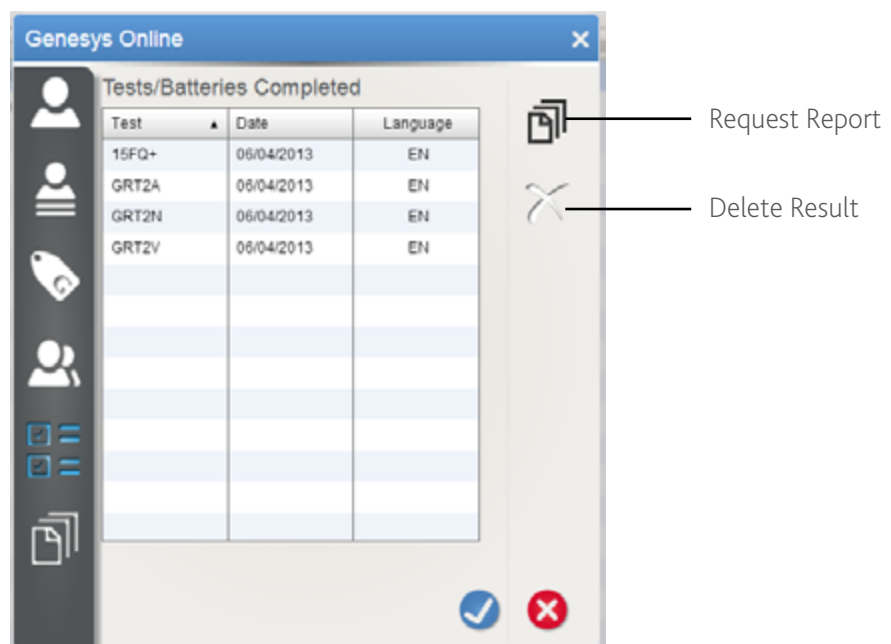
To do this find the respondent in the main respondent screen, or within a group.

Then double click on the respondent.

This will open the respondent view screen.

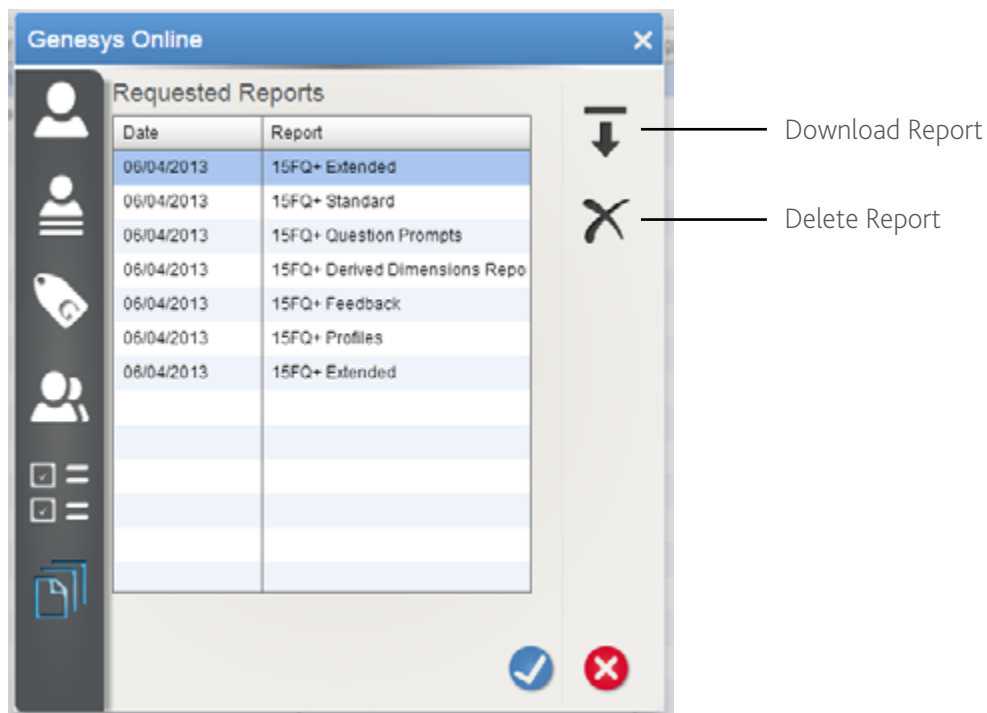


To view a respondents result history click on the Respondent Results tab option.



To generate a report from one of these results select the result and click the Request Report button in the respondent screen. The normal report wizard will then launch.

To view all reports that have been requested for a respondent, click the Respondent Reports tab button.



From this screen you can download any report that has been generated for the respondent in the past, or delete it from their record.

End.