

PSYTECH GeneSys

Unit Five: Managing and Organising data - Filtering, Tags
& Groups

Unit Five: Objectives

Find and Manage Data

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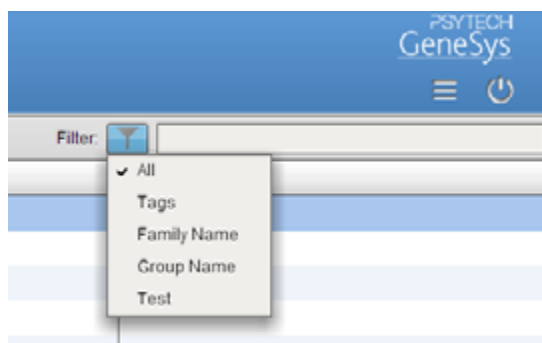
Advanced Data Filtering

Finding data quickly and accurately is a key fundamental requirement when managing large data sets. Psytech GeneSys offers this with its live instant filtering tools that are available in virtually all areas of the system.

Live Search

Search tools are offered on almost every main page within Psytech GeneSys. This can be found at the top right of the page. You can adjust your filters by clicking on the filter icon. This means that GeneSys is already looking for suitable results from within your dataset as soon as you start typing the first letter of your query, and it will then continue to refine the results live onscreen with each additional character entered into the search field.

This means that GeneSys has often found the record you are looking for, before you have finished typing your search query.



Cross Data Filtering

When GeneSys searches it's not just looking at one field within your dataset, Email address for example. Instead it looks at all fields at once, making searches even simpler. This means that you don't even need to know all the details you are searching for, because GeneSys is searching in every single field offering you live results based on what you have typed so far.

Filtering By Tags

Tags are easy to use personalised labels you can append to any record. Tags can say anything, and record any information about one respondent or thousands. Tags are also indexed by GeneSys meaning that they can also be used for faster filtering of groups. For example you may tag a group of respondent by their company. Then instead of searching for each respondent individually, you simple need to search for the company itself.

Logical Filters

Logical filters allow you to refine you queries further. This offers you the ability to combine searches with AND/OR statements. Again giving you live, instant results. For example, you could use a filter to search for people who have completed "15FQ+ AND JTI" or you could use "15FQ+ AND Company X" to give you filtered results for all people who have completed the "15FQ+" AND are employees of "Company X". You can also use OR statements, such as "15FQ+ OR JTI" which will return all results in your system that have completed 15FQ+ OR JTI, but not necessarily both together.

Tags

Tags are one of the most important features within the Psytech GeneSys system. They give you a tool that can be used to help you personalise the structure of your data, making things like finding single respondents from within thousands simple, or for forming large data sets from respondent records that all have linked references with just a simple search. Tagging respondents is the most effective way within GeneSys to link multiple respondents with shared properties together across your dataset.

What Are Tags?

Tags are essentially labels that can be attached to one or more respondents. These labels can have any text written on them, from the respondents' organisation, the nature of the recruitment, comments of the assessment process, the assessment center they were part of. The list is endless. Once used, a tag is then always available to be attached to another respondents in the future.

Filtering by Tags

All tags are indexed within the system, meaning that they can then be used to instantly filter respondents using the live search tools Psytech GeneSys offers. This means it's as simple as typing the first few letters of the tag in the search field to start getting a meaningful filtered respondent data. Tags can also be used with logical searches where you wish to find respondent data for people with Tag1 AND Tag2, or people with Tag1 OR Tag2.

Why Tag?

Tagging is easy. Once your data is tagged you can find you data in seconds, easily find specific respondents and use them to create an ideal profile, or form large sets of data that you can then use to build your own norm.

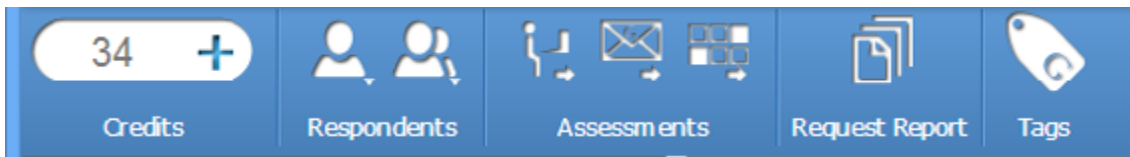
To Tag or to Group?

Groups within Psytech GeneSys are temporary structures allowing you to form collections of respondents. A group could be made, for example, for an assessment center day where you wish to perform a Managed Group assessment to all respondents within the group. Once that assessment center is complete the group becomes redundant and can be deleted at any time without the loss of data.

Tags are however persistent, linked to the respondent whenever they are used within GeneSys allowing you to keep a permanent, filterable record of the assessment center, shared property or other activity.

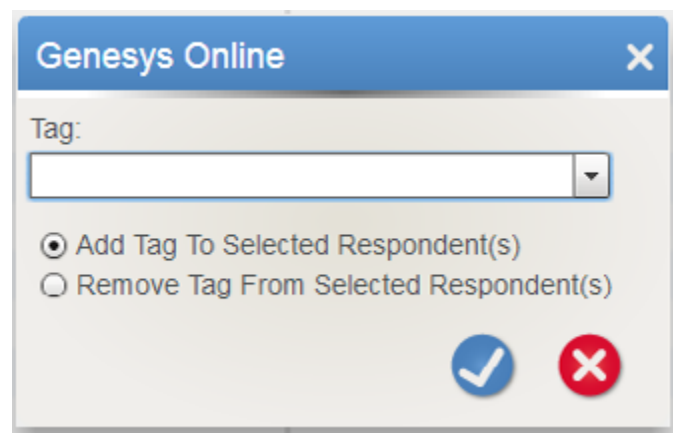
Tagging Individuals

To tag a respondent, select the respondent in the main content area, and then press the Tag button in the main Toolbar.



Pressing the tag button will launch the Tag Wizard. From here you can type in a new tag, or select an existing one from the drop down menu. Tags can then either be added to a respondent record, or removed if they already exist.

When you have finished press the tick button to apply the tag.



Tagging Groups

Tagging multiple respondents is as easy as tagging one.

Simply select the respondents you wish to tag, either from the respondent screen or from within a group.

Then press the Tag button in the main Toolbar.

Enter the text for the tag, and then press the tick button to apply it.

Now all selected respondents will have that tag applied which can then be used to filter the respondents on at any time in the future.

Groups

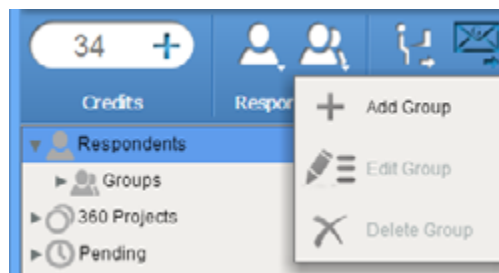
Groups are temporary structures for gathering specific respondents together. For example, you may wish to assess multiple respondents in one day. You can therefore use a filter to find the respondents and then add them all to a group. Then when the assessments start, all your respondents are filtered ready for you to use them. Once the assessments are over and the reports generated you can then delete the group. Deleting a group won't touch the data within the group, it just ungroups those respondents. All data added to a respondent while in a group remains attached to that respondent.

Adding a Group

There are two main ways to add a group:

- Click the Groups button in Respondent section of the main Toolbar, and then select Add Group.

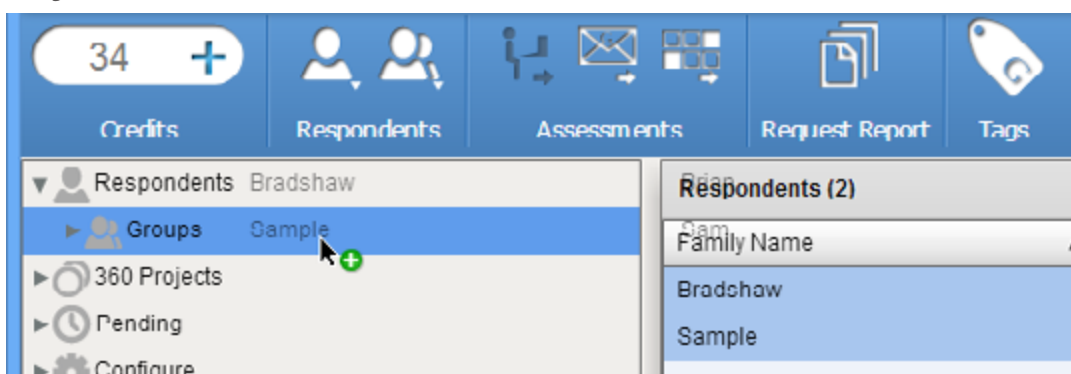
The Add Group wizard will open. Give the group a name and a description. Then press the OK button.



Then drag and drop respondents into your new group.

- Drag and drop a selection of respondent from the main content screen onto the Groups node in the navigation Tree Menu.

This will trigger the Group Wizard, allowing you to add a group name and a description. After pressing the tick button all the selected respondents will automatically be added.



End.