NEOS
Assessment Centre
User Manual

... simple and meaningful business reporting

NEOS Pty Ltd

Updated 28 October 2014

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1. Logging In

To login: Go to the http://neoshrsystems.com/ home page (figure 1). Enter your username and password, then click *Log in*.

BROWSER NOTE - The following browsers are advisable in the use of this system: Google Chrome, Firefox & Safari.
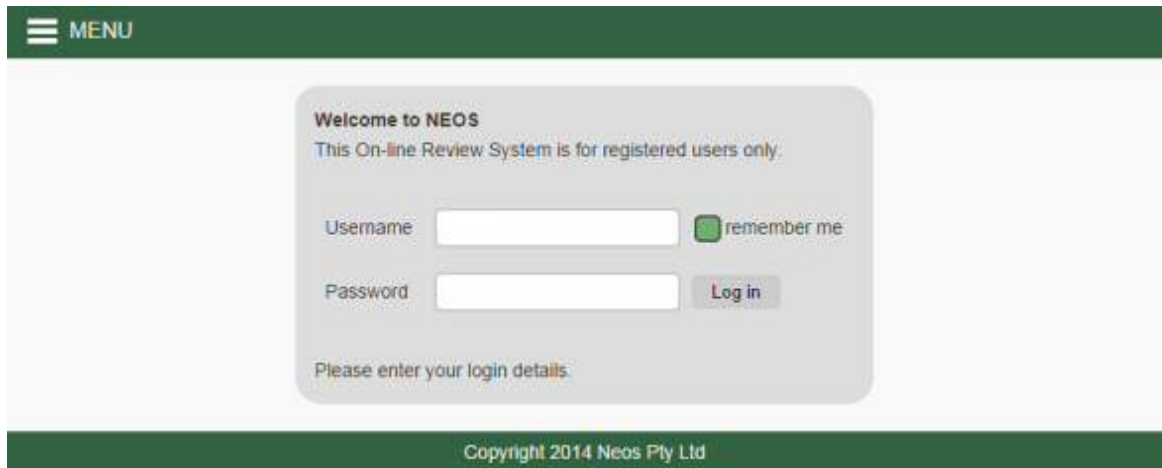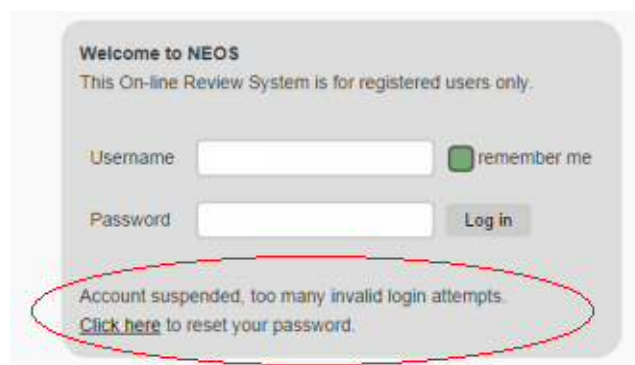

Figure 1: Login

- The **remember me** box creates cookie on the user device which will populate the user name automatically. It will not remember your password. Deselecting the box deletes the cookie immediately.

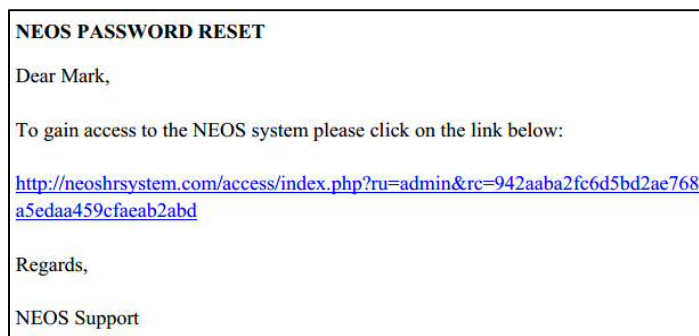## 1.1 LOGIN TROUBLESHOOTING, RESETING & CHANGING PASSWORDS

- You have 3 attempts to enter the correct password.
- If you wish to **change your password**, deliberately enter 3 incorrect passwords. The system will lock you out and send an email prompting you to reset your password (as the below steps illustrate).

- After invalid login attempts are exceeded you must reset your password. The following prompt will appear:

After clicking on the 'Click here' hyperlink you will see the following confirmation:

- Your designated email will receive the following message prompting you to reset your password via a new link:

NEOS PASSWORD RESET

Dear Mark,

To gain access to the NEOS system please click on the link below:

http://neoshrsystem.com/access/index.php?ru=admin&rc=942aaba2fc6d5bd2ae768a5edaa459cfaeab2abd

Regards,

NEOS Support

- Clicking on the reset link in the email will redirect to the following screen:

- Password strength is evaluated as you enter the new password. When the pass word is acceptable (i.e. contains at least one Upper case and one Character), the 'Change password' button will appear:
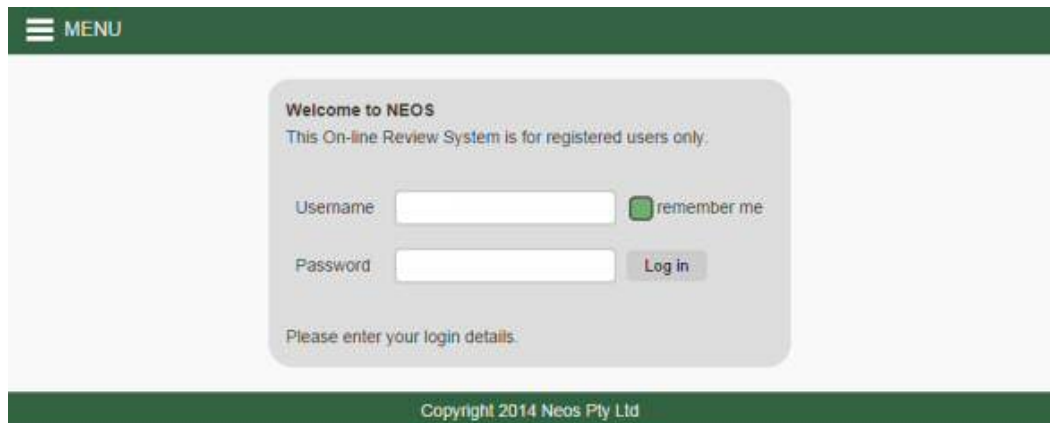

- The following confirmation will appear once your password change has been finalised:

- You will then be redirected to the login screen. Enter your username and new password.

2.   Welcome Page

Once you have successfully logged in, the welcome page will appear (see below). The menu pane will fan out upon selecting the menu ICON ☰ MENU on the top left corner of the screen.

Figure 2: Welcome Page and Menu pane

System access details indicate:

- Your access level
- Your approver status
- Whether you have an organisational chart
- Your access expiry date

Company details indicate:

- Your company name
- How many of your reviews have been approved
- How many of your reviews are awaiting approval
- The total amount of reviews you have conducted
- How many active modules you have access to

3.   Menu Pane & Navigation

The menu pane allows you to navigate across the applications. You may also utilise the Search Bar featured at the top of the Menu pane to navigate, often if you already know your desired selection.
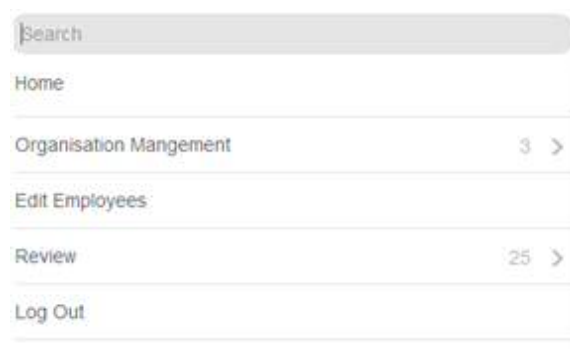

Figure 3– Menu pane

The numbers on the right-hand side of the menu pane indicate the number of sub-items contained in each item.

> **Note:** The type of items you have on your menu pane may differ to those that appear above, depending on what your user account has access to.

System Time Out: The system will time you out after 60 mins of being inactive. The initial log in page will appear and you will have to re-enter you log in details.

To go back a screen: Click the [back] arrow on your browser.

4. Conducting a new assessment

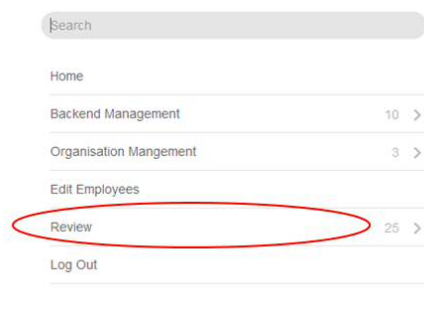1. To conduct a new assessment, select 'Review' on the menu pane.

Figure 4(a) – Close up of Review
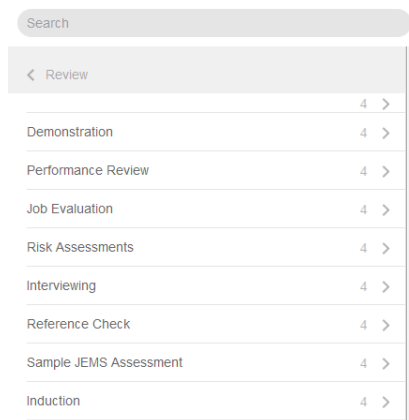
2. Select the desired assessment.

Figure 4(b) – Review menu pane

> **Note:** Your options in Review will differ depending on which assessments your user account and licence agreement has granted access to.

3. Select 'Add New [assessment name]' to start conducting the new assessment.
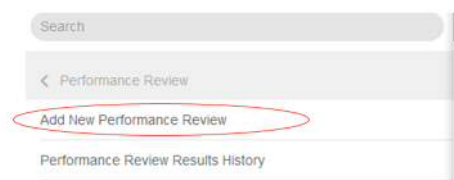

Figure 4(c) – New Assessment. Performance Review Example

4. A details page will appear in which you must make the relevant entries and drop-down menu selections. Click 'Submit' to proceed.

Figure 4(d) – Details page. Performance Review Example

Note: A slight variation of the page may appear depending on the type of assessment being undertaken.

Figure 4(e) – Assessment. Performance Review Example

Note: Depending on the type of assessment, the layout will differ. However generally, the key aspects of the screen are:

1. Reference details

The assessment seen above details the reference number and appropriate name and/or or identification number and stream name.

2. Category tabs

These feature below the details bar and contain the groupings of elements. Simply click the various tabs to move between categories (listed left to right).
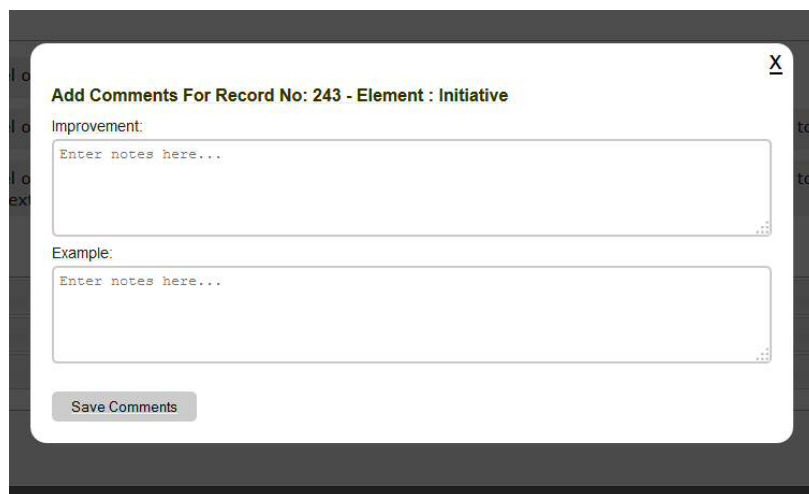
3. Elements/Characteristics

These feature within the categories and contain multiple levels of information (typically, criteria descending or ascending in scale) for you to select. Simply click the various drop down tabs to move between the elements (listed top to bottom) and to reveal the levels.

4. Levels

Choose the most appropriate level by reading all of their descriptors and clicking on the checkbox or anywhere on the Level area. **A green square** (Chrome, Firefox) **OR tick** (Internet Explorer) should appear on the left of your selected level. The element name will **BOLD and turn green** to indicate a selection has been made. See an example below:

5. **To make a comment** select the Comment ICON 💬 that appears on the bottom left corner of each element. You can make comments within every element. The dialog box below should appear:
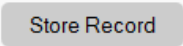
Click '**save comments**' upon completion. These comments will be seen by the person who can approve the report and will also appear in the final reports.

The comment icon will appear against the element name to indicate your comment has been left. See below:
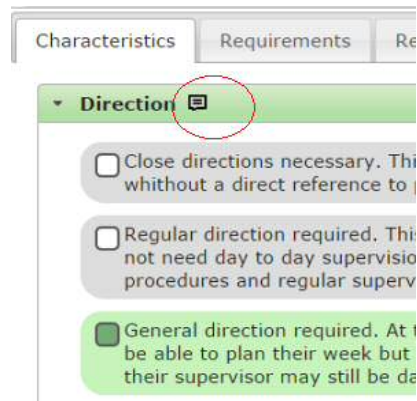

7. Complete Assessment:

The [Store Record] ICON should appear on the bottom left corner once the assessment has been completed.

> If 'Store Record' DOES NOT appear, this indicates your assessment is incomplete and you may have missed one or more selections.
>
> If an element name is NOT **bold OR GREEN** – this indicates a level selection has NOT been made.

8. **Report Generated:** The screen below will appear upon the storing of a record. It is a list of all assessments made for the module. The assessment you have just completed will be the first in the list.

TO VIEW &/OR PRINT THE REPORT

1. Click the report to highlight it yellow.

2. Click [REPORTS] featured on the bottom left hand side of the list.

A dialog box will appear outlining options for different formats of the report:
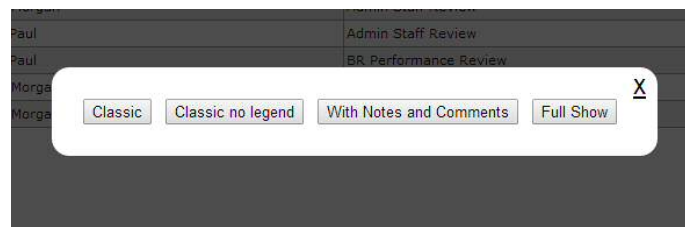
Note: The options featured in the above screen shot will vary according to your licence agreement. For example if your licence agreement grants you 360 degree feedback or trend reporting options. These names (i.e. 'Trend Report') will appear in lieu of the labelled 'Classic' or 'Classic no legend' etc. options.

3. Select your report – it will download as a PDF file.

Note: Reports will bear a **DRAFT** watermark if it has not yet been approved (also indicated by a white square in the 'approved' column of the list above – i.e. last column). You can only approve if you have an approver user status. See your System Administrator to clarify or change your status.

The figure below shows a sample report for a Performance Review.
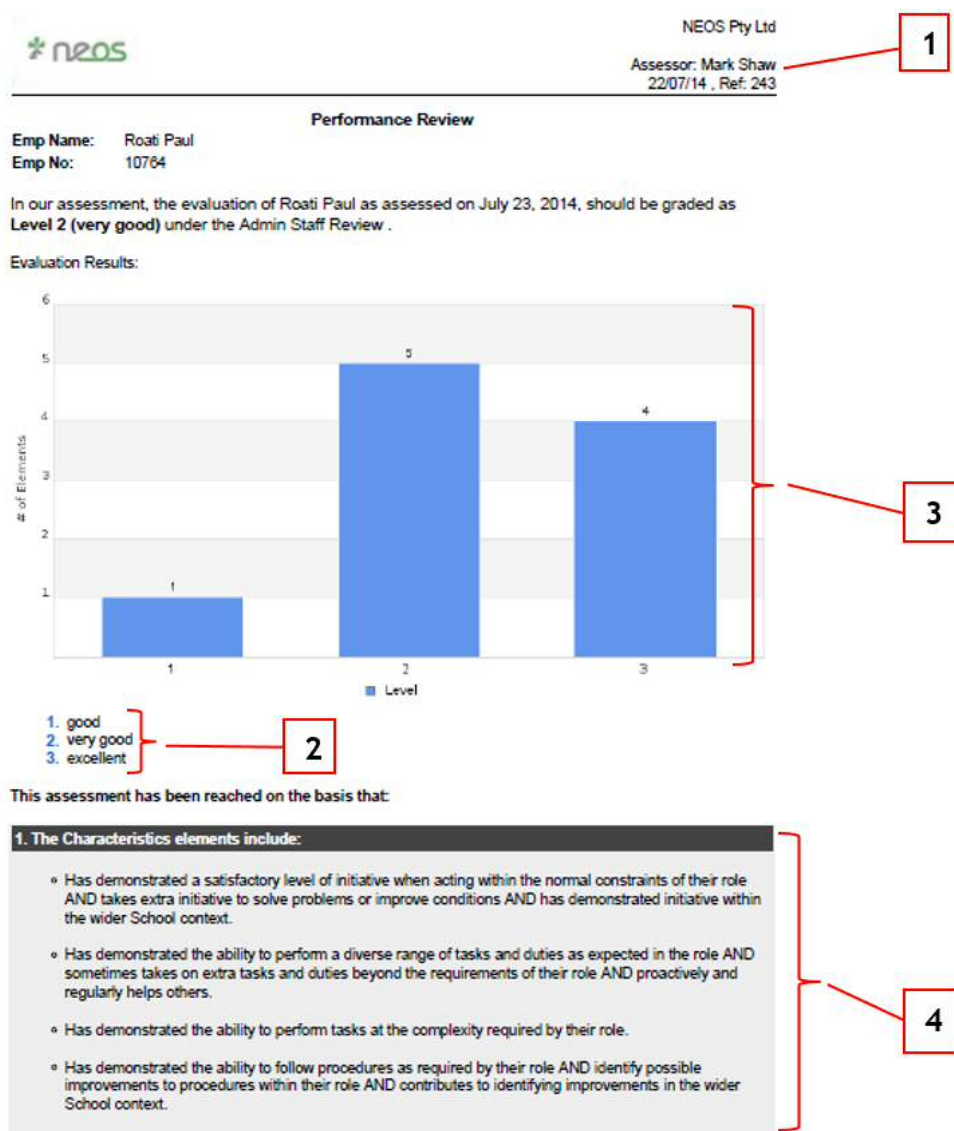
Figure 4(i): Sample Report. Performance Review

This report contains the following detail:

1. The date the assessment was made and its unique reference number

2. A key indicating the meaning of each numbered level

3. A graph, indicating how many elements were rated at each level

4. Word descriptions of each level selected. Usually in summary form.

Nb: Any notes made by the assessor will appear report

This report can then be printed, saved under a general directory of an electronic management system or emailed. This document should be stored/processed as per your company's policies.

You may also access these reports later – see 5.1 'View Reports' p.12

5. Functions in Assessment Results

There are a number of functions that can be completed in assessment history. You may:

1. VIEW AND PRINT assessments

2. EXPORT results list into Excel

3. APPROVE assessments

4. EDIT draft assessments

5. DELETE assessments

5.0 To Begin

1. From the main menu pane select 'Review'

2. Select an [assessment]

3. Select '[assessment name] Results'

4. The screen below will appear listing all the assessments made by you and depending on your security access (i.e. for internal supers and assessors), you may be able to see other assessors' assessment.

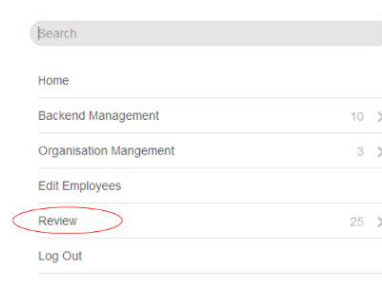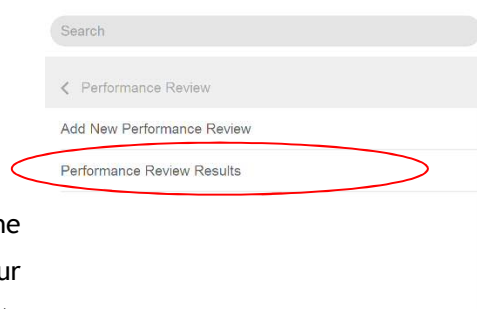| Res ID	Date	Job No	Job Title	Award	Stream	Result	Approved
216	08/14/2014	001	test	Anglican Schools Schedule 4	Finance	3	○
135	05/13/2014	001	test lvl less than 9	NSW Local Government Award	NSW LG Award	2	○
163	06/06/2014	1234	Administration Officer	QLG Officers Award	QLGO A	4	○
164	06/06/2014	1233	Labourer	QLG Emp Award	Labourers and Others	4	○
165	06/06/2014	1232	Plant Operator	QLG Emp Award	Plant Operators	4	○
166	06/06/2014	1231	Plant Operator	QLG Emp Award	Plant Operators	3	○
195	07/09/2014	23	Erfdes	Sample JEMS	Sample JE	3	○
197	07/12/2014	34	Test	New Hope	New Hope	3	○
217	08/15/2014	1	Test	Sample JEMS	Sample JE	5	○
133	05/06/2014	001	test	NSW Local Government Award	NSW LG Award	11	○
46	02/22/2014	001	Test	Social Community Award 2010	Social & Community - Schedule B	4	○
35	02/20/2014	100	test	QLG Officers Award	QLGO A	2	○
36	02/20/2014	001	test	QLG Officers Award	QLGO A	3	○
42	02/22/2014	test	test	Social Community Award 2010	Social & Community - Schedule B	4	○
48	02/22/2014	001	Test	QLG Emp Award	Plant Operators	4	○
45	02/22/2014	001	Test	Social Community Award 2010	Social & Community - Schedule B	2	○
207	08/09/2014	3	Ewe	Anglican Schools Schedule 4	Finance	4	●
203	07/25/2014	78	Jyui	Anglican Schools Schedule 4	Administration x	4	●
200	07/12/2014	323	Fredd	Sample JEMS	Sample JE	3	●
96	04/15/2014	001	Test	NSW Local Government Award	NSW LG Award	1	●
49	02/22/2014	001	Test	QLG Officers Award	QLGO A	3	●
160	05/28/2014	Test	Test	Anglican Schools Schedule 4	Administration x	1	●
159	05/28/2014	Test	Test	Anglican Schools Schedule 4	Administration x	2	●

5.1. To View and Print drafts & approved assessments

1. Complete steps in 5.0.

2. Click the report to highlight it yellow. You may filter the results according to the filter options featured on the top rows.

3. Select the Reports ICON [REPORTS]. A dialog box (below) will appear containing the report options. (see 4.8 for more information re: Report)

This will generate the report in PDF format. From here you may print the report as per your settings.

> **Note:** The options featured in the above screen shot will vary according to your licence agreement. For example if your licence agreement grants you 360 degree feedback or trend reporting options. These names (i.e. 'Trend Report') will appear in lieu of the labelled 'Classic' or 'Class no legend' etc. options.
>
> The type of security access may alo limit your actions to select certain reports. security access. For example, sub assessors will only be able to generate their own assessments, whereas internal super, org super and assessors can generate reports of others.

4. Select a report – it will download as a PDF file.


Note: Reports will bear a **DRAFT** watermark if it has not yet been approved (also indicated by a white square in the 'approved' column of the list – i.e last column). You can only approve if you have an approver user status (see 5.3 below).

5.2. To Export the results list into an Excel spreadsheet

This function allows you to export the <u>list of assessments</u> that appear on the results screen

1. Complete steps in 5.0.

3. Click the Export ICON on the bottom left side of the screen.

5.3 To Approve assessment

(**Note:** This option will only appear for users with an 'Approver' status – see 8.0)

1. Complete steps in 5.0.

2. Select the assessment you wish to approve by clicking the desired row (once selected it should remain highlighted yellow).
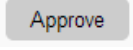
3. Select the EDIT ICON

> This will take you through the assessment, enabling you to view the assessors' selections and comments. A comment icon appears against the element name to indicate a comment has been left by the assessor. You are unable to edit another assessor's selections.
>
> **Everytime you make a change**, a comments dialog box wil automatically appear (see below). It is at your discretion whether you leave a comment to justfy your change. You can dismiss the dialog by clicking the 'x' on the top right corner. A comment icon will appear next to the element name once a comment is left.

Comment Dialog Box

> **4. You may choose to approve the record** by selecting if you agree with the assessment. You may now view the report as per **5.4** below.
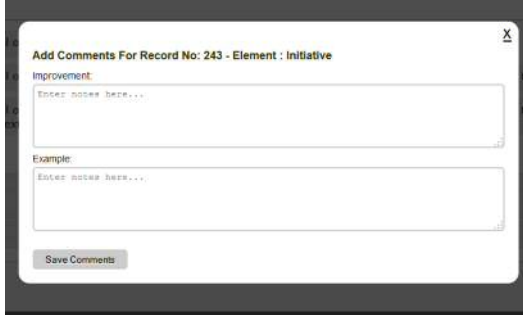
<div align="center">OR</div>

> You may wish to consult the assessor before approving. You may prompt them to edit the assessment as necessary or elaborate and explain their selections more specifically.
>
> In this case, select and review the assessment with the assessor.

5.4 EDIT Drafts

Note: only the user who created the record can edit the assessment. Also see 8.0 for more information.

1. **Complete steps 5.0**

2. **Select** the assessment you wish to edit by clicking the desired row (once selected it should remain highlighted yellow).

3. **Select** the EDIT ICON

4. **The assessment will appear.**

5. Everytime you make a change, a comments dialog box wil automatically appear (see below). It is at your discretion whether you leave a comment to justfy your change. A comment icon will appear next to the element name once a comment is left.

Comment Dialog Box

6. Once you have made the necessary changes/comments, click Update to save changes.

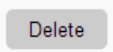## 5.5 DELETE Assessments

1. **Complete steps 5.0**

2. **Select** the assessment you wish to edit by clicking the desired row (once selected it should remain highlighted yellow).

3. **Select** the EDIT ICON

4. Click Delete

6.   Support & Password assistance

Initially, all support calls to:

Neos Pty Ltd: Phone: 07 3420 8200

                   Email: admin@neoshr.com.au

RE: FORGOTTEN / EXPIRED PASSWORDS or LOGIN LOCK OUT

- See Chapter 1.1 of this manual to reset your password