

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.

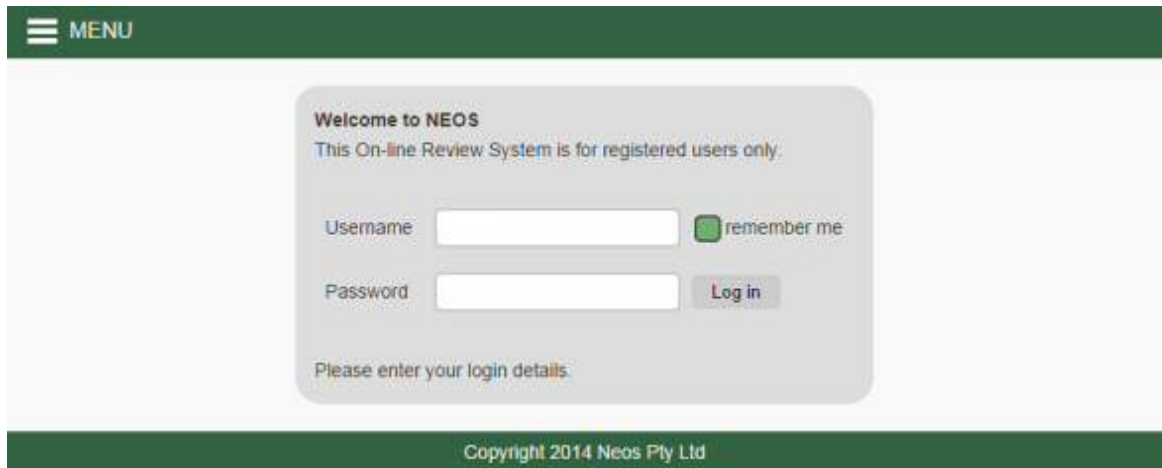
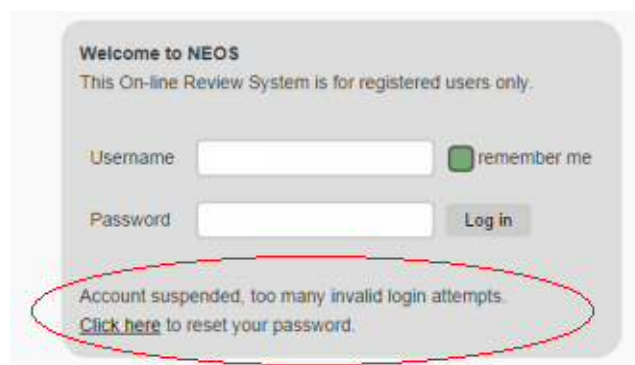


Figure 1: Login

- 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

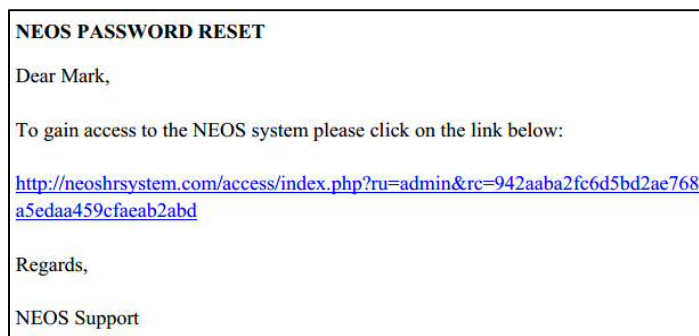
- You have 3 attempts to enter the correct password.
- If you wish to **change your password**, deliberately enter 3 incorrect passwords. The system will lock you out and send an email prompting you to reset your password (as the below steps illustrate).
- After invalid login attempts are exceeded you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



- 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 password is acceptable (i.e. contains at least one Upper case and one Character), the 'Change password' button will appear:



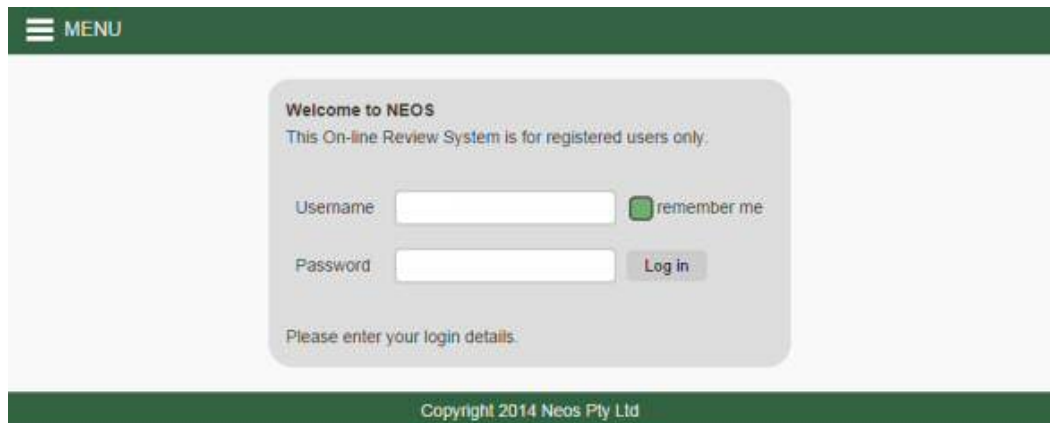
The screenshot shows a web interface with a dark green header containing a 'MENU' button. The main content area features a light gray rounded rectangle with the title 'Please enter a new password'. Below the title, the 'Username' field is pre-filled with 'admin'. The 'Password' field contains 'LetMeIn!' and is highlighted with a yellow background, indicating it is 'Acceptable'. A 'Change Password' button is visible below the password field. A legend below the button shows three color-coded boxes: a green box for 'Strong', a yellow box for 'Acceptable', and a red box for 'Not safe'. The footer of the page is dark green and contains the text 'Copyright 2014 Neos Pty Ltd'.

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



The screenshot shows a dark green header with a 'MENU' button. The main content area is a light gray rounded rectangle with a central message: 'Password changed'. The footer is dark green and contains the text 'Copyright 2014 Neos Pty Ltd'.

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



The screenshot shows a dark green header with a 'MENU' button. The main content area features a light gray rounded rectangle with the title 'Welcome to NEOS' and a subtitle 'This On-line Review System is for registered users only.' Below the subtitle, there are two input fields: 'Username' and 'Password'. To the right of the 'Username' field is a 'remember me' checkbox. A 'Log in' button is located to the right of the 'Password' field. Below the input fields, the text 'Please enter your login details.' is displayed. The footer is dark green and contains the text 'Copyright 2014 Neos Pty Ltd'.

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.

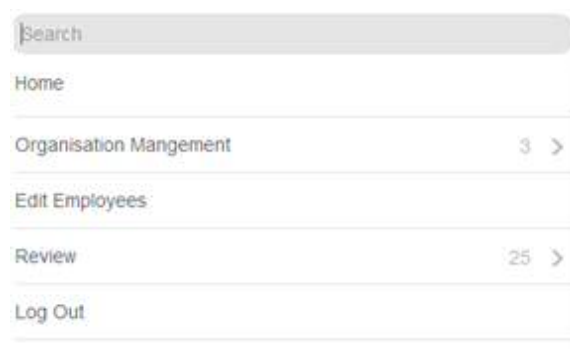


Figure 3- Menu pane

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.

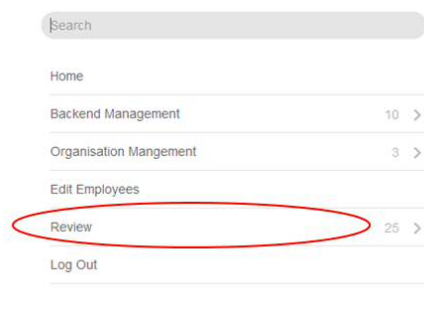


Figure 4(a) - Close up of Review

2. Select the desired assessment.

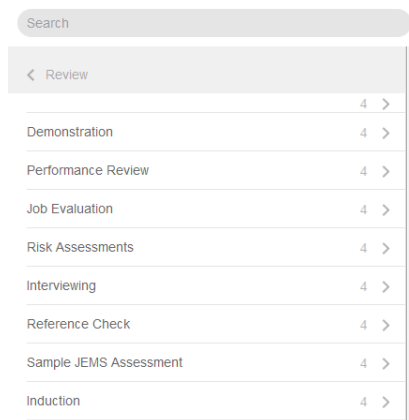


Figure 4(b) - Review menu pane

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.

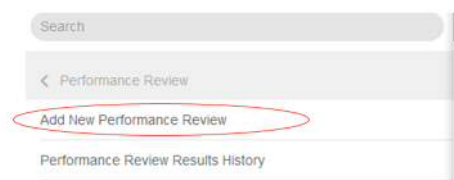


Figure 4(c) - New Assessment. Performance Review Example

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

Creating a new Performance Review
Please ensure the information is correct before submitting as the details can not be changed.

Create a new Performance Review

Emp No **** Select Employee **** ▾

Emp Name

Set ***Select Set*** ▾

Stream **** Select Stream **** ▾

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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.

MENU NEOS Pty Ltd

Ref: 255 , Position: 10764 - Roall Paul , Admin Staff

Characteristics Competency Notes

Initiative

The incumbent has demonstrated a satisfactory level of initiative when acting within the normal constraints of their role.

The incumbent has demonstrated a satisfactory level of initiative when acting within the normal constraints of their role AND takes extra initiative to solve problems or improve conditions.

The incumbent has demonstrated a satisfactory level of initiative when acting within the normal constraints of their role AND takes extra initiative to solve problems or improve conditions AND has demonstrated initiative within the wider School context.

Diversity

Complexity

Procedures

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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 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).

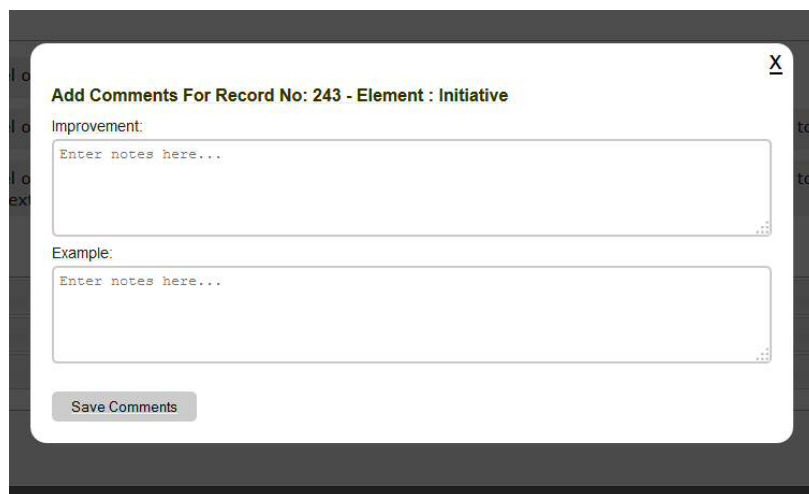
3. Elements/Characteristics

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:

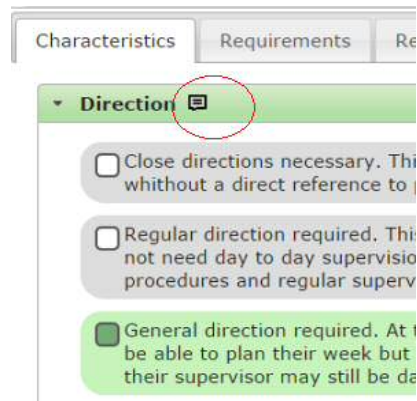
5. To make a comment select the Comment ICON  that appears on the bottom left corner of each element. You can make comments within every element. The dialog box below should appear:



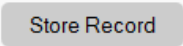
The screenshot shows a modal dialog box with a dark background and a white content area. The title bar at the top reads "Add Comments For Record No: 243 - Element : Initiative" and includes a close button (X) on the right. Below the title, there are two text input fields. The first is labeled "Improvement:" and the second is labeled "Example:". Both fields have a placeholder text "Enter notes here...". At the bottom of the dialog, there is a button labeled "Save Comments".

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.

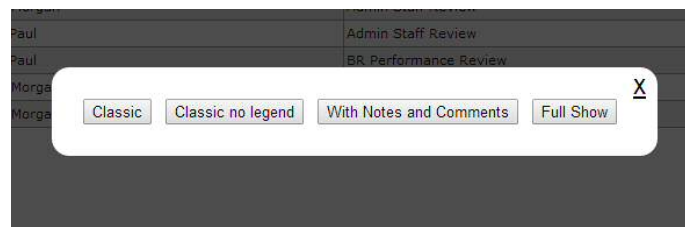
8. Report Generated: The screen below will appear upon the storing of a record. It is a list of all assessments made for the module. The assessment you have just completed will be the first in the list.

Res ID	Date	Job No	Job Title	Award	Stream	Result	Approved
216	08/14/2014	001	test	Anglican Schools - Schedule 4	Finance	3	<input type="checkbox"/>
135	05/13/2014	001	test lvl less than 5	NSW Local Government Award	NSW LG Award	2	<input type="checkbox"/>
163	06/06/2014	1234	Administration Officer	QLG Officers Award	QLGO A	4	<input type="checkbox"/>
164	06/06/2014	1233	Labourer	QLG Emp Award	Labourers and Others	4	<input type="checkbox"/>
165	06/06/2014	1232	Plant Operator	QLG Emp Award	Plant Operators	4	<input type="checkbox"/>
166	06/06/2014	1231	Plant Operator	QLG Emp Award	Plant Operators	3	<input type="checkbox"/>
199	07/09/2014	23	Inf/lea	Sample JMS	Sample JE	3	<input type="checkbox"/>
197	07/02/2014	34	Test	New Page	New Page	3	<input type="checkbox"/>
217	08/15/2014	1	test	Sample JMS	Sample JE	5	<input type="checkbox"/>
132	05/08/2014	001	test	NSW Local Government Award	NSW LG Award	11	<input type="checkbox"/>
46	02/12/2014	001	Test	Social Community Award 2010	Social & Community - Schedule B	4	<input type="checkbox"/>
35	02/20/2014	100	test	QLG Officers Award	QLGO A	2	<input type="checkbox"/>
36	02/20/2014	001	test	QLG Officers Award	QLGO A	3	<input type="checkbox"/>
42	02/22/2014	test	test	Social Community Award 2010	Social & Community - Schedule B	4	<input type="checkbox"/>
40	02/22/2014	001	Test	QLG Emp Award	Plant Operators	4	<input type="checkbox"/>
45	02/22/2014	001	Test	Social Community Award 2010	Social & Community - Schedule B	2	<input type="checkbox"/>
207	06/09/2014	3	Fee	Anglican Schools - Schedule 4	Finance	4	<input checked="" type="checkbox"/>
203	07/25/2014	78	yu	Anglican Schools - Schedule 4	Administration x	4	<input checked="" type="checkbox"/>
200	07/12/2014	323	Frind	Sample JMS	Sample JE	3	<input checked="" type="checkbox"/>
96	04/18/2014	001	Test	NSW Local Government Award	NSW LG Award	1	<input checked="" type="checkbox"/>
49	02/22/2014	001	Test	QLG Officers Award	QLGO A	3	<input checked="" type="checkbox"/>
160	05/28/2014	Test	Test	Anglican Schools - Schedule 4	Administration x	1	<input checked="" type="checkbox"/>
159	05/28/2014	Test	Test	Anglican Schools - Schedule 4	Administration x	2	<input checked="" type="checkbox"/>

TO VIEW &/OR PRINT THE REPORT

1. Click the report to highlight it yellow.
2. Click  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.

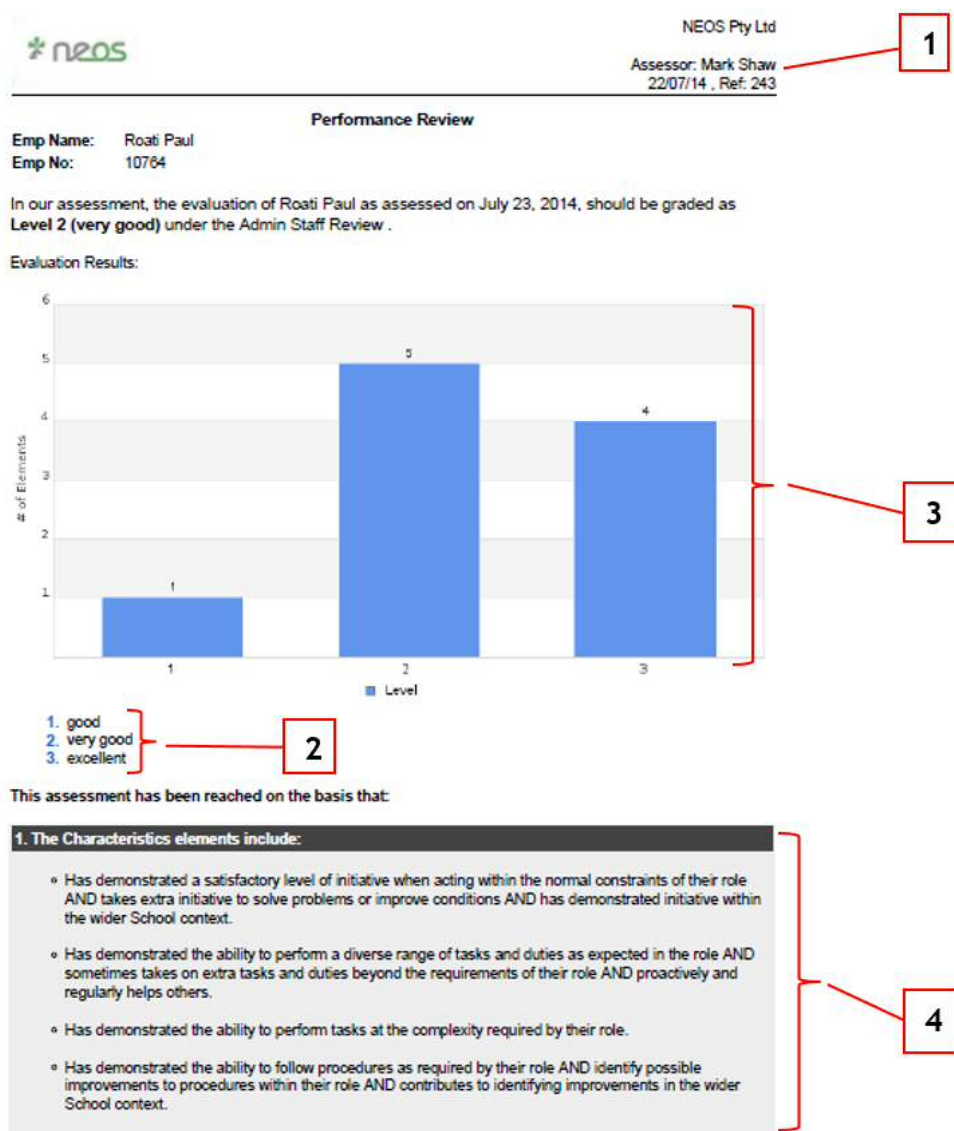


Figure 4(i): Sample Report. Performance Review

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

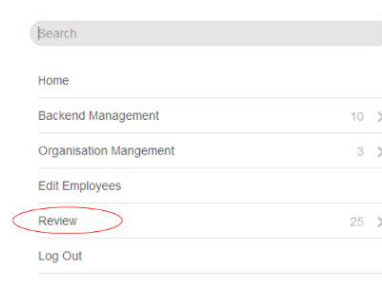
5. Functions in Assessment Results

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

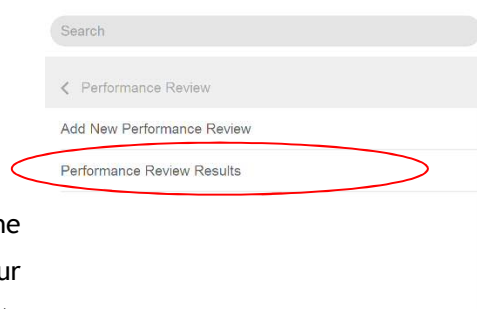
1. VIEW AND PRINT assessments
2. EXPORT results list into Excel
3. APPROVE assessments
4. EDIT draft assessments
5. DELETE assessments

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.

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

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 . 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 also 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.




Assessment ID	Assessment Name	Assessor	Assessment Date	Assessment Status	Approved
1	White box
2	Green box
3	Green box
4	Green box
5	Green box

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 list of assessments 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).

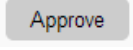
3. Select the EDIT ICON 

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 justify 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.



OR

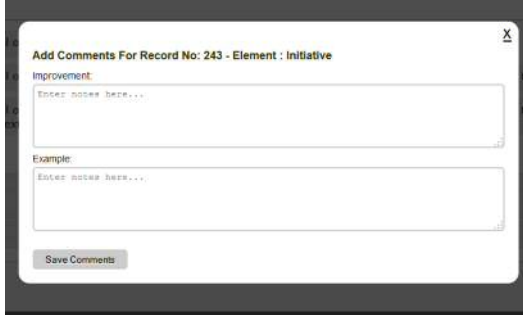
You may wish to consult the assessor before approving. You may prompt them to edit the assessment as necessary or elaborate and explain their selections more specifically.

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.


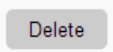
1. Complete steps 5.0
2. Select the assessment you wish to edit by clicking the desired row (once selected it should remain highlighted yellow).
3. Select the EDIT ICON 
4. The assessment will appear.
5. Everytime you make a change, a comments dialog box wil automatically appear (see below). It is at your discretion whether you leave a comment to justify 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  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 

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