Manual for Organization Administrators

Assessment Platform
Manual or Organization Administrators
September 19, 2023, version 1.1"

Index

1. Introduction

Welcome to the Assessment Platform! Below is a guide on the key options available to you as an organization administrator.

You have various ways to use the system. You can invite candidates to complete an assessment or link them to a process, where you can add assessments and assign advisors who can also manage candidates.

1.1 Explanation of Terms

This guide uses several terms that are explained here:

- **Process:** A process is a standard package that can include assessments, written texts, and information exchange with a candidate.
- **Assessment:** An assessment is an online questionnaire, test, game, or simulation.
- **Task:** When referring to a task, this can mean either an assessment or a process.
- **Candidate:** A candidate is the person who receives and completes the task.
- **Advisor:** An advisor is the person who can create a candidate, assign assessments, and view results.
- **Coach:** A coach is an advisor who also manages the processes of candidates.
- **Co-Advisor:** This is a second person who, alongside the advisor/coach, has access to the progress and results of a candidate.
- **Organization Administrator:** This is the person who, in addition to any coaching rights, is the administrator of the environment. An organization administrator can change settings for the entire organization, view subscription details, and create users.
- **Contact Person:** This person can, for example, observe an assigned candidate on behalf of a client and view final reports.

In this guide, we will explain the basic capabilities to you. If you have any questions about the platform or its functionalities and possibilities, feel free to contact us!

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2. Costs and Subscriptions

In the Assessment Platform, as a user, you have two different options: 1) you can use the system to deploy individual assessments, and 2) you have the option to use processes in which you can implement assessments. Below is an explanation of the costs and subscription types.

2.1 Subscriptions

You have the option to assign individual assessments to candidates. To assign assessments and request reports, you need to subscribe. We offer three types of subscriptions: Occasional, Frequent, and Intensive. The costs for each subscription type are displayed on our website: https://www.ixly.com/nl/tarieven#abo-assessments. There are no charges for creating advisors or the candidates for whom you wish to deploy the assessments.

2.2 Occasional

With an Occasional subscription, you do not pay a fixed monthly subscription fee. Charges are only incurred for the assessments you deploy. The assessments are paid for with credits, which can be purchased in bundles in the user environment. See the section on Ordering Credits for further explanation on purchasing credits.

2.3 Frequent and Intensive

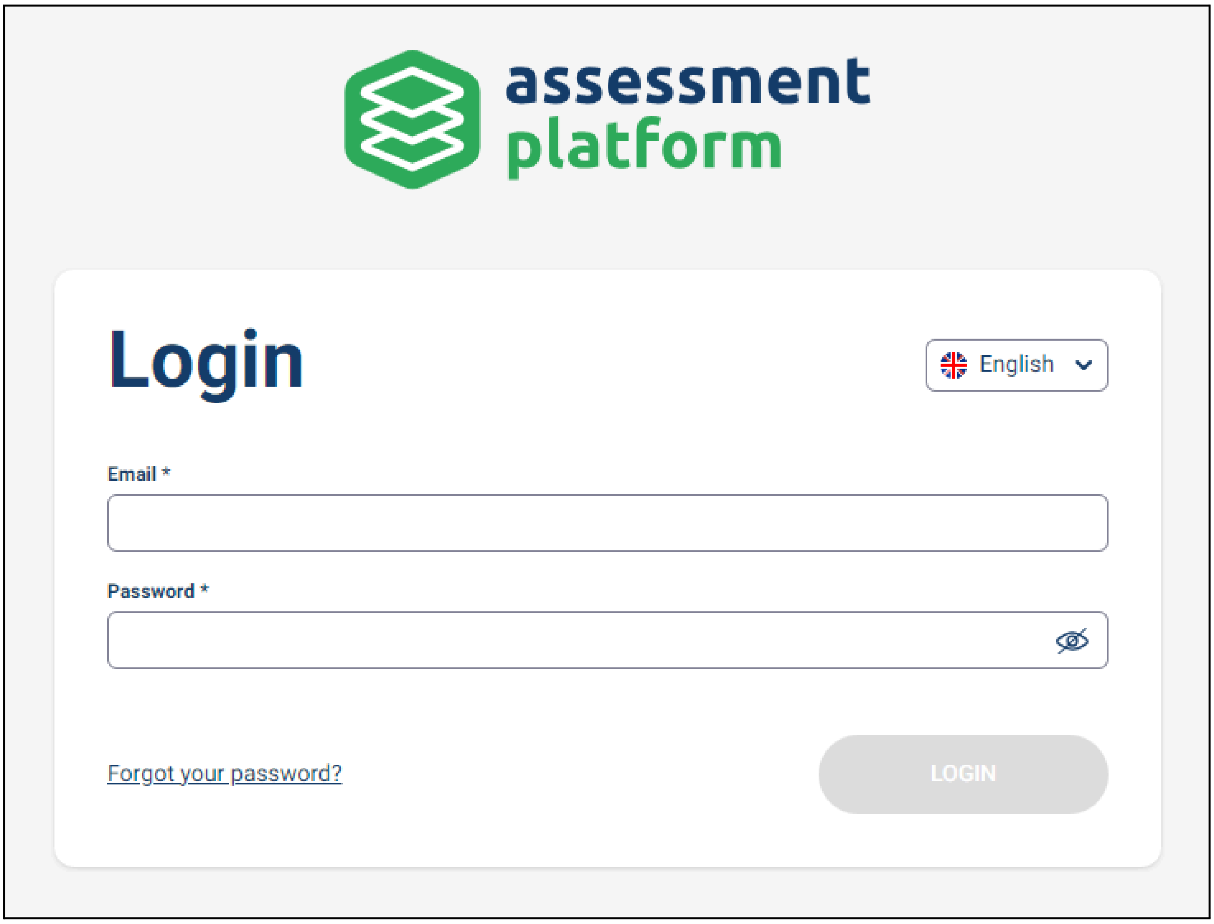
With the Frequent and Intensive subscriptions, you pay fixed monthly subscription costs. The price differs depending on the subscription type. Additionally, you also pay for the assessments you have deployed. The cost per assessment varies between a Frequent and an Intensive subscription. Generally, the higher the subscription cost, the more advantage you get per credit. See our price list for the exact costs per assessment. At the end of each month, you will receive an invoice for the subscription fees and the total costs of the assessments used. An additional benefit of the Intensive subscription is that you can add multiple users to your organization.

Would you like more information about our subscriptions or want to know which subscription is most suitable for you? Please contact us.

1. Logging In and Managing Your Settings

3.1 How Do I Log In?

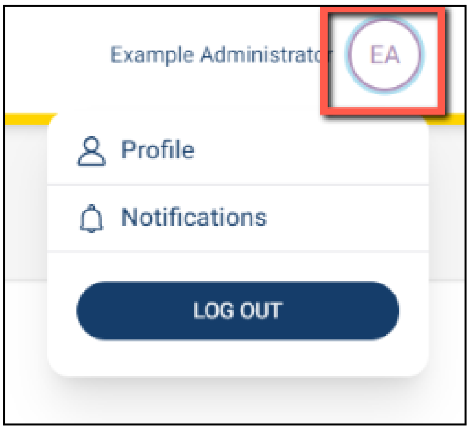
After receiving an invitation from us for your own account and having your own username and password, you can log in at https://assessmentplatform.com/ to use the system.



TIP: *Have you forgotten your password? You can use "Forgot Password" to enter your email address and create a new password. You will receive an email at the provided address with which you are registered in the Assessment Platform.*

3.2 How Can I Change My Personal Information?

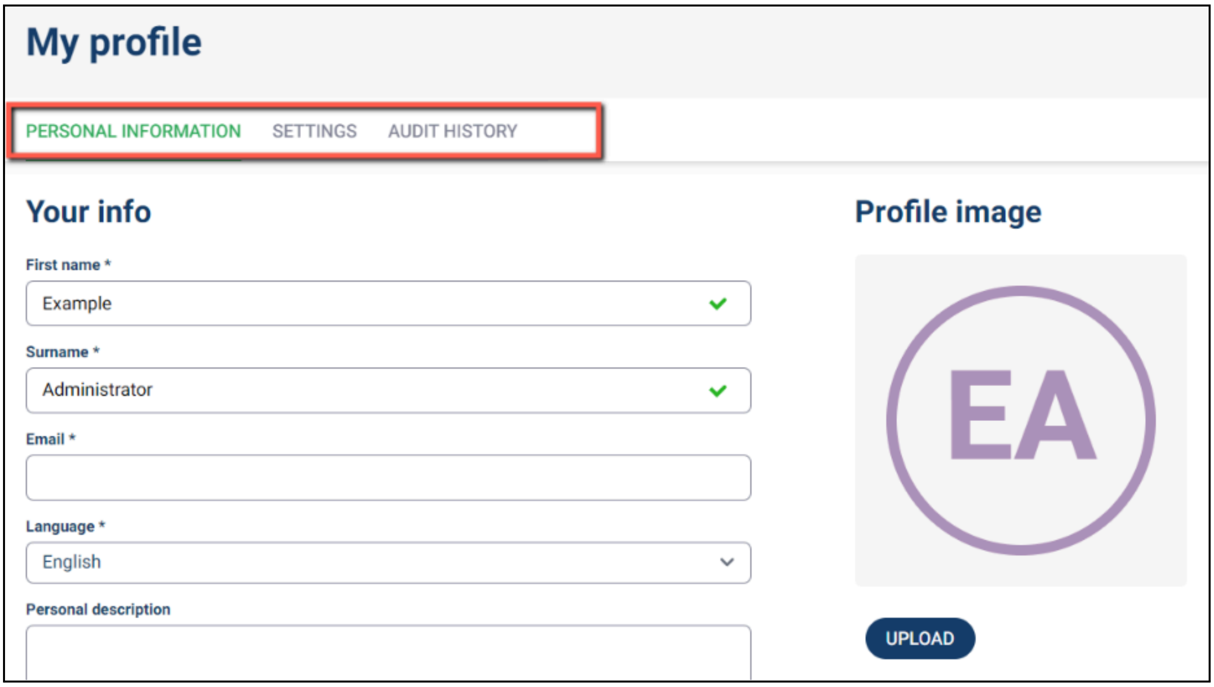
To change your personal settings, click on the round circle in the top right corner. This may display your initials or the profile picture linked to your account. From there, select "Profile."



On the "**Personal Information**" page, the first page you access in the settings, you can add or change your name, email address, photo, and personal description, and you can request a new password.

TIP: *If you are using processes and have included the "coach introduction" element, we recommend adding your personal description and photo so that the candidate can see this in the process.*

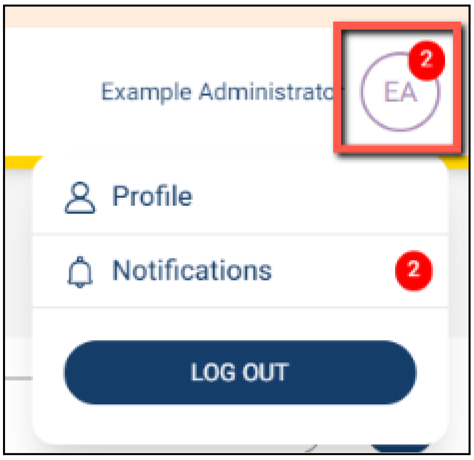
In the "**Settings**" tab, you can specify how often you want to receive emails. For example, you will receive a notification when your candidate has finished completing an assessment.



Additionally, you can enable ‘**two-factor authentication’** (2FA) for your account. This means you will log in not only with a password but also with a code. You can use an app like Google Authenticator on your phone for this purpose.

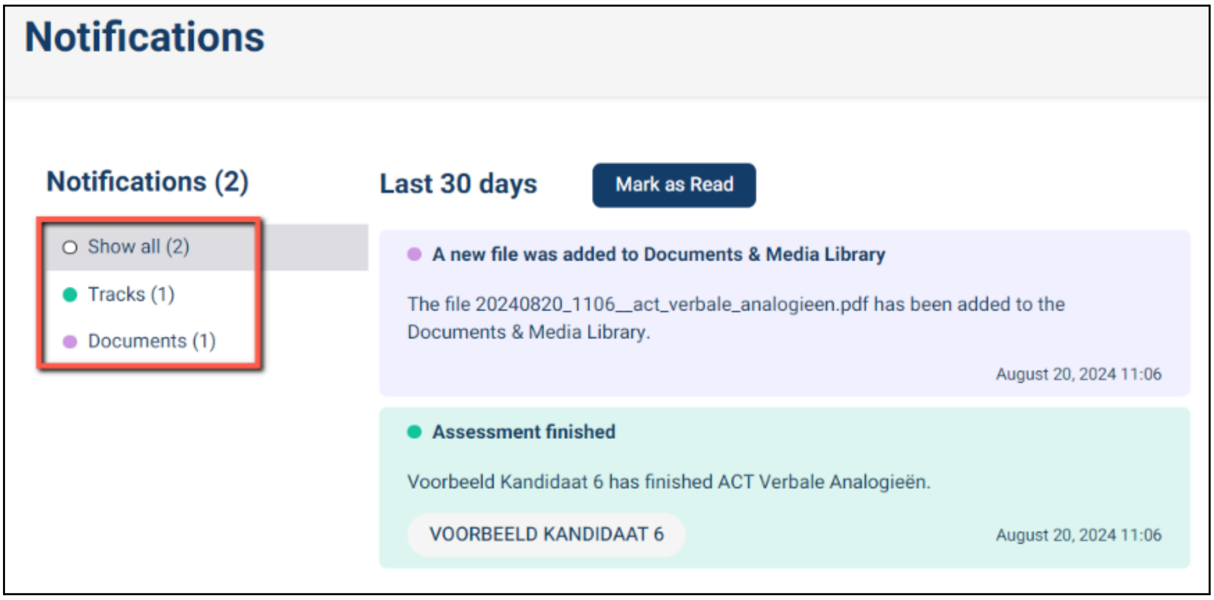
2. Notifications

In the menu of your personal data, you can also view notifications. Here, you will receive general updates as well as updates about your candidates. For example, when your candidate has completed an assessment.



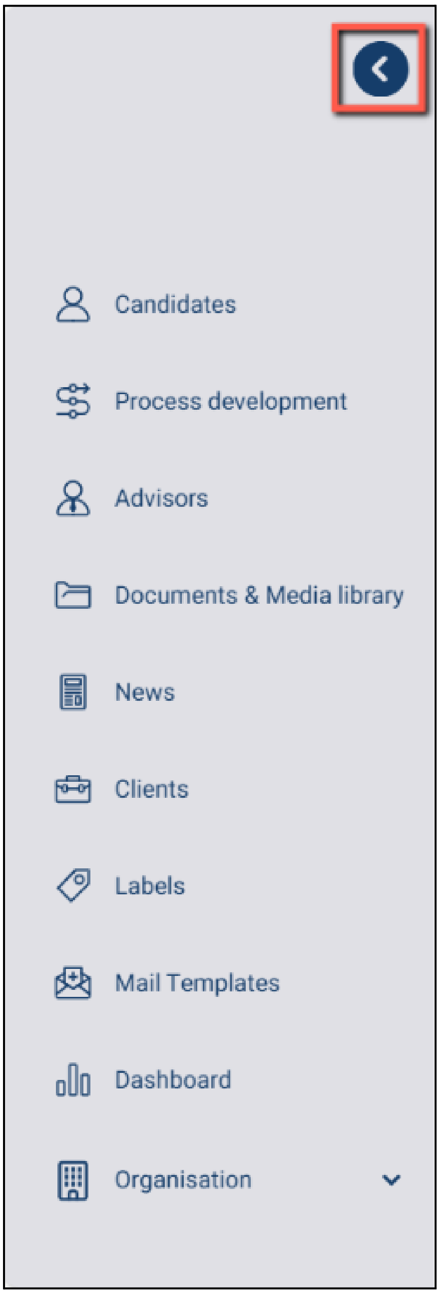
<u>4.1 Filtering Notifications</u>

In the menu on the left, you can specify which **notifications** you want to see. We recommend keeping a close eye on all notifications. When you click on the notifications related to your processes, you will be taken directly to the relevant overview of your candidate. Notifications are kept in this overview for **30 days**. Older notifications are deleted.

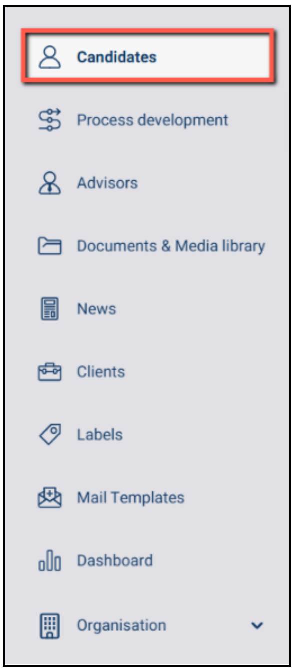


3. The main menu on the left side

We will guide you step by step through the main menu on the left side of the screen in the Assessment Platform. You can expand and collapse this menu by clicking the **blue arrow** with your mouse. This way, you can see not only the icons but also the titles of the menu items.



4. Managing Candidates



Here, you can manage everything related to candidates in the Assessment Platform.

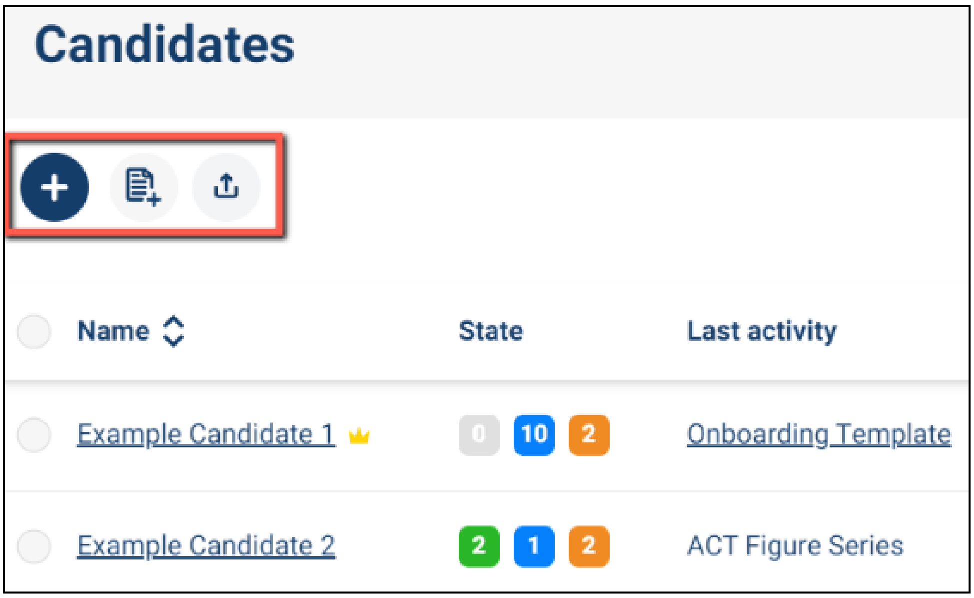
6.1 What can you do?

- Create new candidates (including bulk uploads)
- Edit existing candidates
- Assign a process or assessment to your candidate
- Track progress
- Generate reports
- (De)activate or delete a candidate

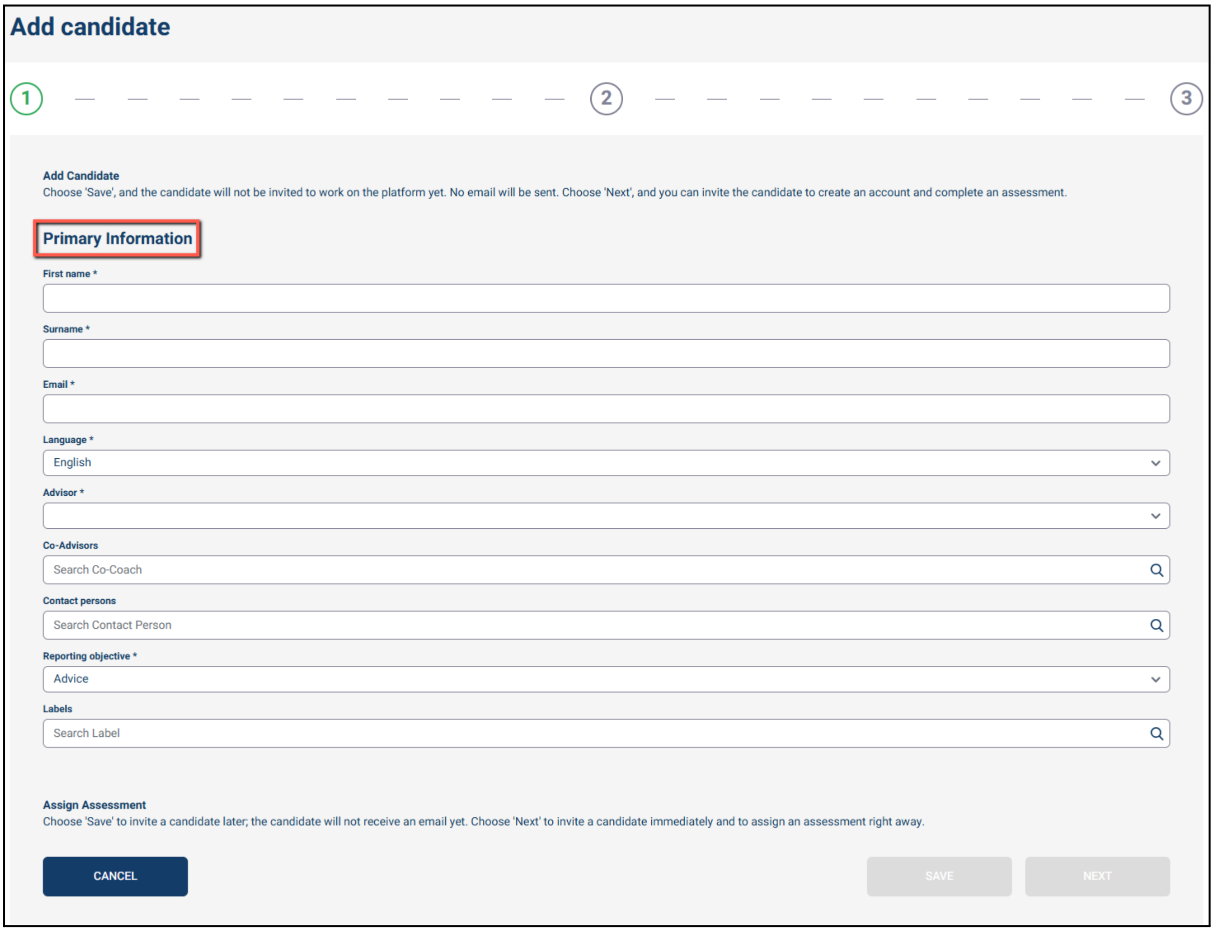
In the "**Candidates**" screen, you can add or modify your candidates, send emails, prepare processes or assessments for them, and view reports.

<u>6.2 Creating and Inviting Candidates</u>

Using the icons at the top of the screen, you can **create a new candidate,** upload a group of candidates via a **CSV file,** or generate an **export file** of your candidates.



When you click the blue button with the plus sign, you'll be taken to the page where you can create a new candidate.

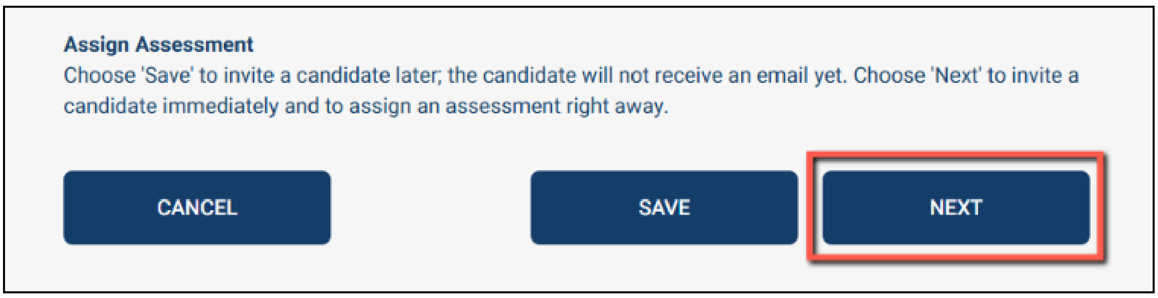


You will enter a screen that consists of three different steps.

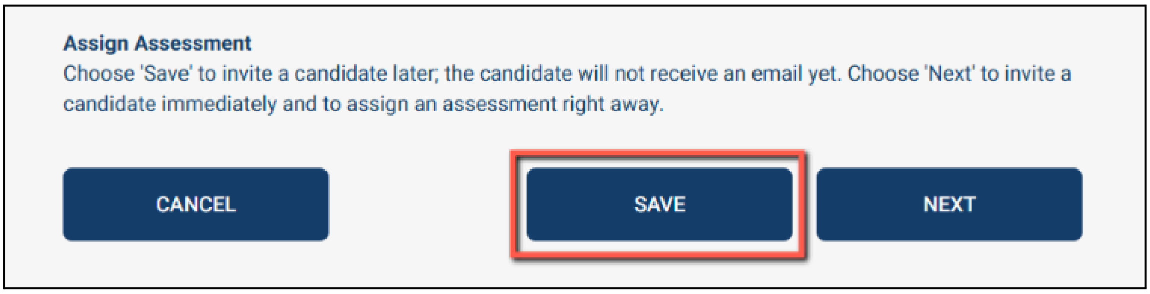
Step 1: Enter candidate details

In **Step 1,** you fill in the primary details of the candidate. This includes personal information about the candidate, as well as details such as which advisor you want to assign to the candidate or which benchmark group you want to use for the candidate's reports (see reporting objectives)

TIP: *You can also change the advisor later. For example, you can initially set yourself as the advisor and then assign the candidate to a different advisor later on..*



When you click "Save," the candidate is saved, and you can assign a task and send an invitation at a later time. If you click "Cancel," nothing will be saved.



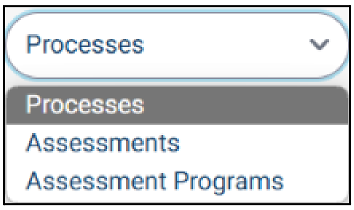
TIP: *If you accidentally entered the candidate's email address incorrectly, you have the option to correct it. If the invitation has already been sent to the incorrect email address, the candidate will receive an email at the new address to accept the change to the (new) email address.*

Step 2: Assigning Assessment, Assessment Program, or Process

In Step 2, while creating the candidate, you will select the desired process, assessment, or assessment program to assign to the candidate. Once you select one of these options, all available processes, assessments, or assessment programs will be displayed.

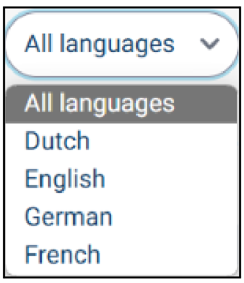
- To assign a single test or questionnaire, such as the Work-Related Personality Questionnaire (WPV), select **Assessments**.
- To assign a test program, such as the Talent Development Assessment, select **Assessment Programs**.
- To assign a process to a candidate, select **Processes**.

If you haven't built or published any processes in your environment, the **Processes** overview will be empty.

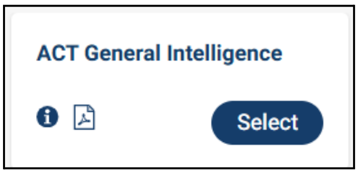


Language settings for assignment

You can easily find an assessment in a specific language by selecting the desired language.

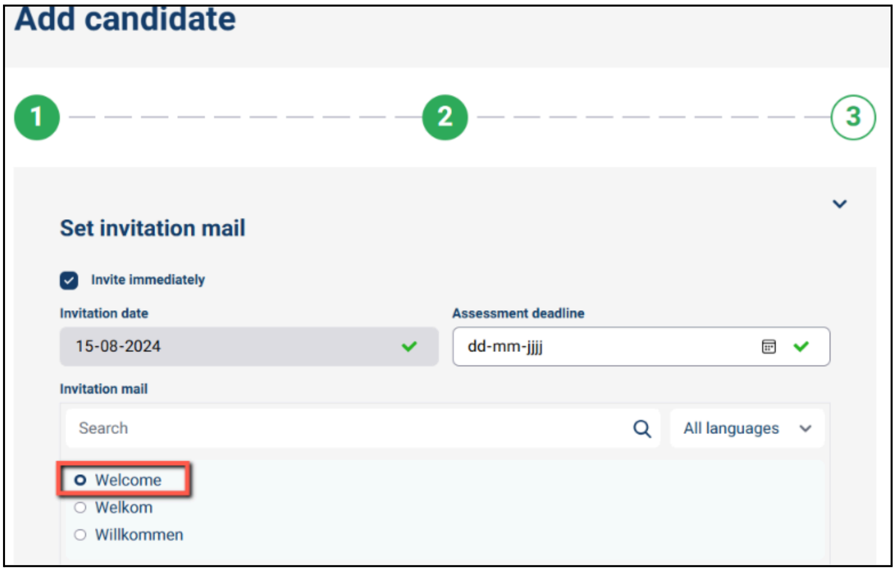


Once you have found the desired assessment or process, click the "Select" button. You can assign multiple assessments and processes to a candidate.



Step 3: Invite the Candidate

Next, click on "Next" in the lower right corner to proceed to Step 3, where you can send an invitation email to the candidate.



In Step 3, select the email template you want to use to send the invitation to the candidate. You will then see a preview of the email that will be sent.

Note: In the email preview, the link to the Assessment Platform will appear as a #.

Direct Invite is Selected by Default

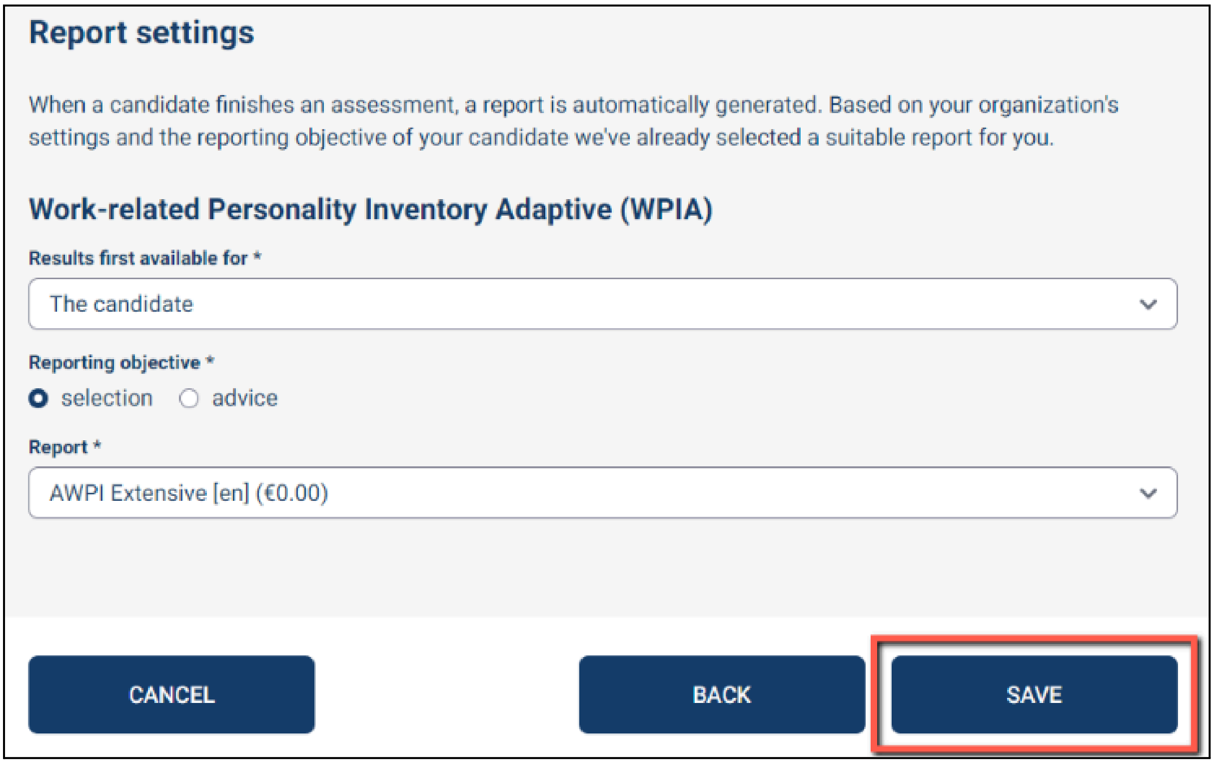
By default, the option to send an invitation email to the candidate immediately is checked. If you prefer not to send the invitation now, uncheck the box. This will allow you to invite the candidate at a later time. See sections 6.3 and 6.4 for instructions on how to invite a candidate later or assign an assessment, assessment programs, or process at a later time.

Invitation Email

When you send an invitation email to a candidate, they will receive an email with a link to set up a password. After setting up the password, the candidate will gain access to their own account, where they can view and start all assigned tasks. The candidate can only begin working once they have received the invitation email and set up a password for their account.

TIP: If you want to set up your own email template, check the section titled "Email Templates" in this manual for instructions on how to do so.

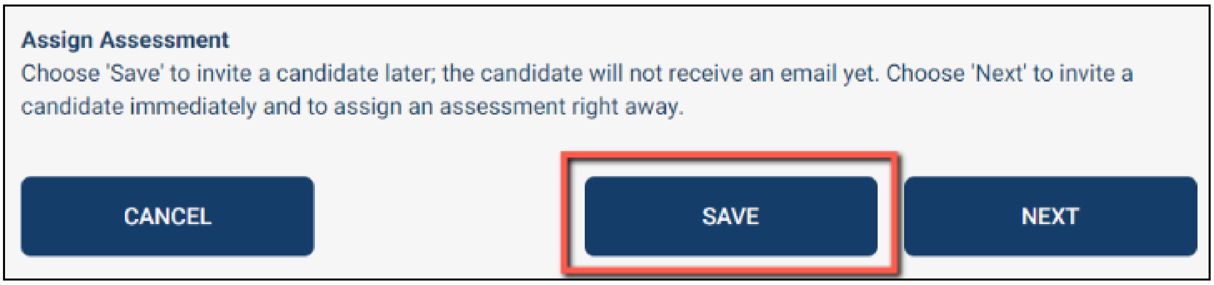
Report settings and visibility



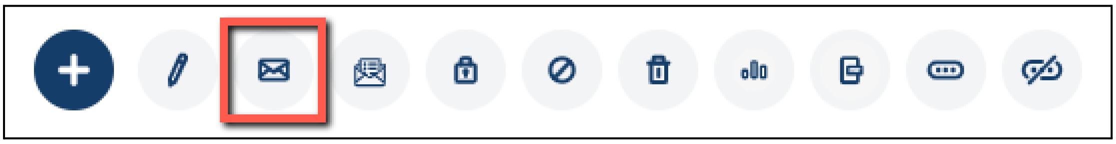
In Step 3, you also have the option to determine who will **first receive** access to the results: the participant, the coach/advisor, or both simultaneously. Additionally, you can set different **reporting objectives** (benchmark groups) for each report and choose between the **various versions and languages** of the available reports. Click "**Save**" to apply the settings and send the invitation email. The candidate can now get started!

6.3 Inviting a candidate later

When you clicked "**Save**" in Step 1, you chose to invite the candidate at a later time.



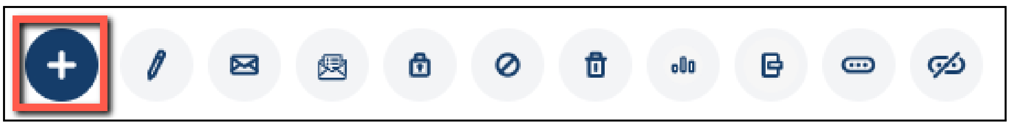
After clicking on this, you will return to the candidate overview. Here, you will also see that the created candidate has been added to the overview. If you only want to invite the candidate to create their account without assigning any assessments, assessment programs, or a process, click on Send Email.



Next, select the desired template you want to send to the candidate and click Send. The candidate will then be invited to create their account.

6.4 Assigning Assessments, Assessment Programs, and Processes to the candidate at a later time

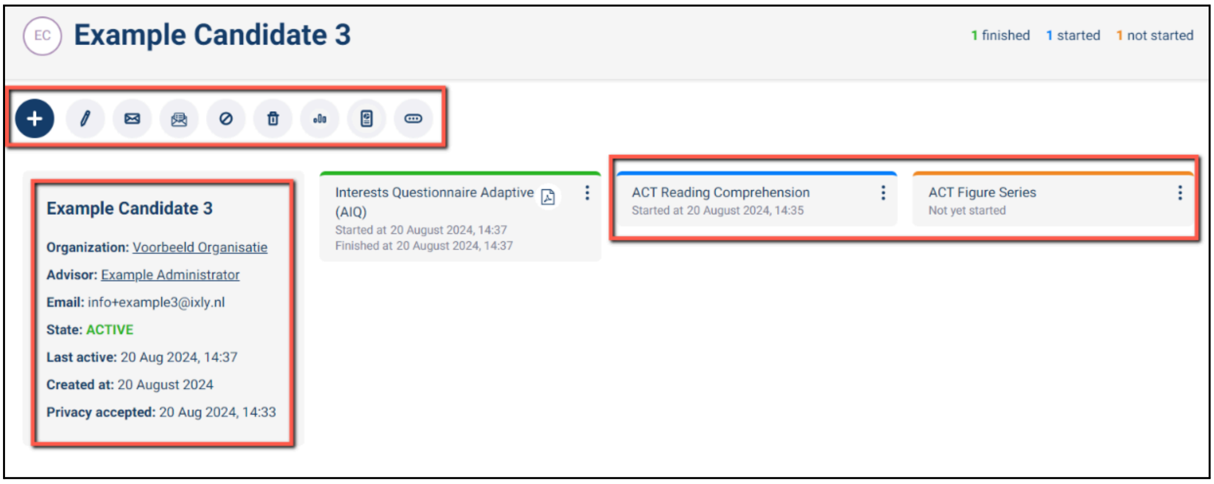
If you have chosen to assign an assessment, assessment program, or process to the candidate at a later time, you can still do so by selecting **Create process**.



When you click **Create Process**, select the desired assessment, assessment program, or process you want to assign to the candidate. For instructions on assigning tasks and inviting a candidate, refer to section 6.2, steps 2 and 3.

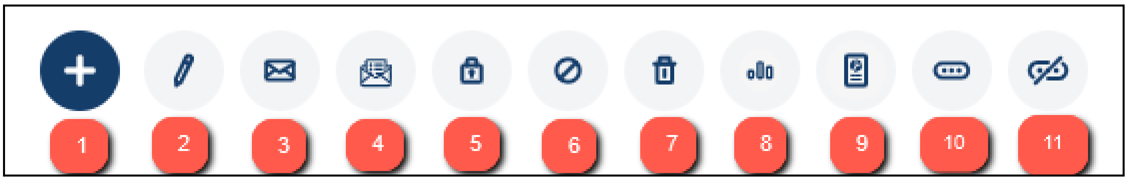
6.5 Candidate Information

You can also click on any of your candidates to view or edit further details. Here, you can assign a process, edit candidate information, or remove the candidate, as well as view reports or results. Additionally, you can see when the candidate has been active, which coach is assigned to the candidate, and the processes that are ready for the candidate.



6.6 Managing Candidates

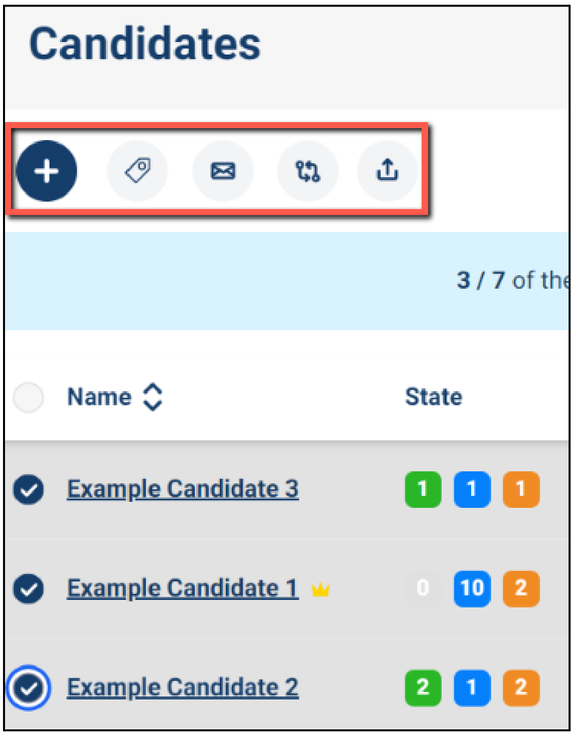
When you select an individual candidate, you will see various options applicable to that candidate. You can link a process to your candidate, edit the candidate's details, send a welcome email, log in as the candidate (depending on the organization's settings), deactivate or delete the candidate, view results, download and generate reports, and send a password reset email. Below is an explanation of what each icon represents.



1. "Through the Create Task button, you have the option to assign assessments, assessment programs, and processes to a candidate.
2. Here you can modify a candidate's details.
3. Sending a welcome email to the candidate, allowing them to activate their account.
4. An overview of the emails sent to a candidate.
5. Logging in as the candidate (this is only possible if this option is enabled in the privacy and data retention settings).
6. Deactivating the candidate.
7. Deleting the candidate.
8. On the personal results page, the candidate's key results are displayed. Note: this feature is not yet available for the test-only variant of the platform.
9. The candidate's report overview, where reports can be downloaded.
10. Sending a password reset email to the candidate.
11. Option to copy a one-time passwordless login link.

6.7 Bulk Actions

If you have selected multiple candidates, you have the option to perform bulk actions. With bulk actions, you can assign a process to multiple candidates, add labels, or send an email to several candidates at once.



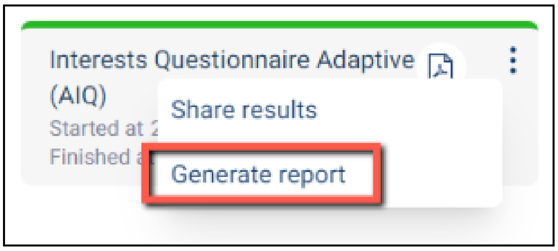
TIP: Want to perform bulk actions? Assign a label to your candidates, even if you don't need it right away!

6.8 Rapporten genereren en beheren

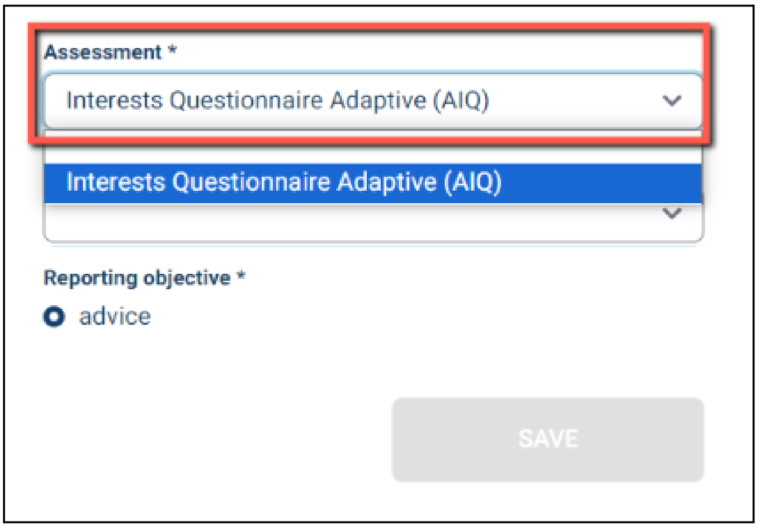
Once a candidate has completed their assessment(s), you can generate reports*. To check if the candidate has completed their assessments, look at the status. If there is a green block under Status, it indicates that the candidate has completed at least one assessment.

__Note:__ Whether you can generate a report immediately depends on the settings. For example, if you have set it so that the candidate receives access to the results first, the candidate must release the results before you can generate a report. Additionally, for processes, the process must be completed before the system considers it finalized.

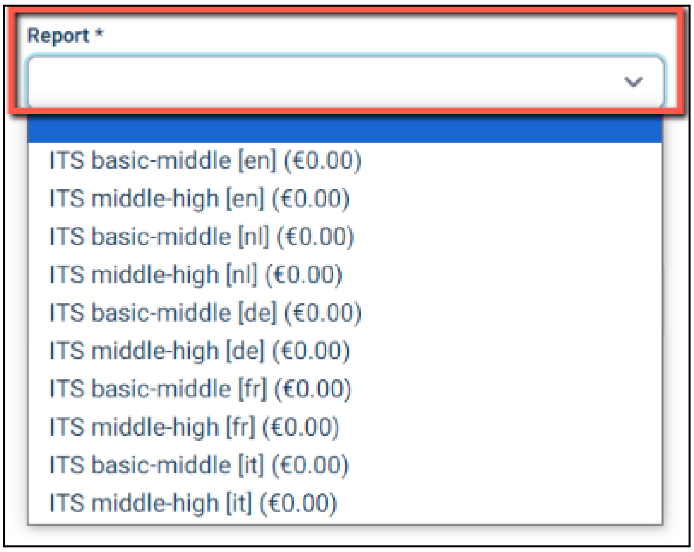
When you click on the candidate's name, you can see that the candidate has, for example, completed the Divergent Thinking Test. To generate a report, click on the three dots in the top right corner next to the test, and then select **Generate Report**.



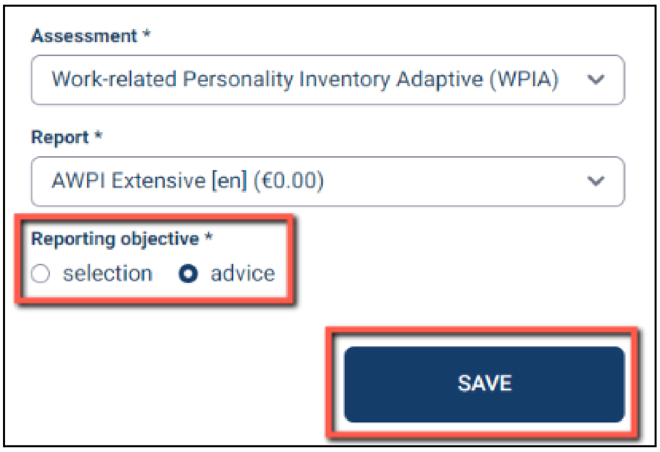
Next, select the assessment for which you want to generate a report. In this case, it would be the Divergent Thinking Test.



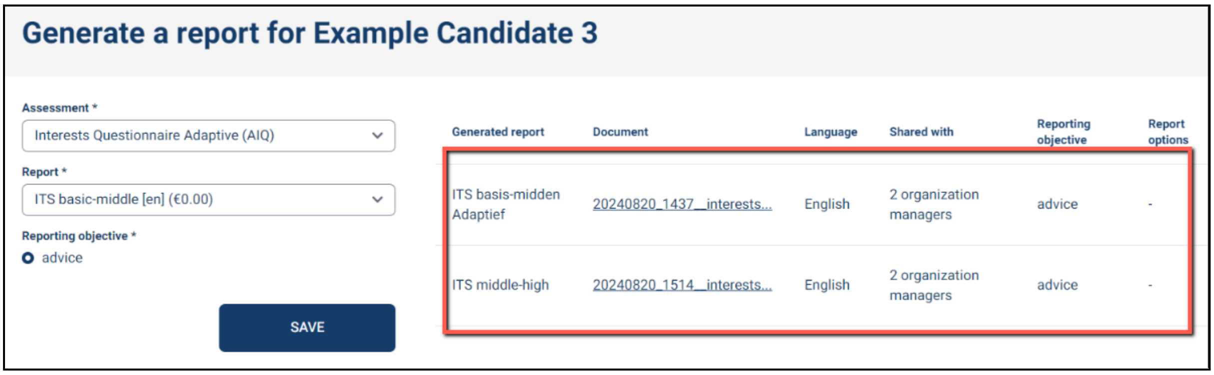
Once you have made your selection, choose the type of report you want to generate. This will depend on the available options. In the case of this example, you can generate the Divergent Thinking Test report in various languages.



After selecting the appropriate options, choose the correct **Reporting Objective** and click **Save**.



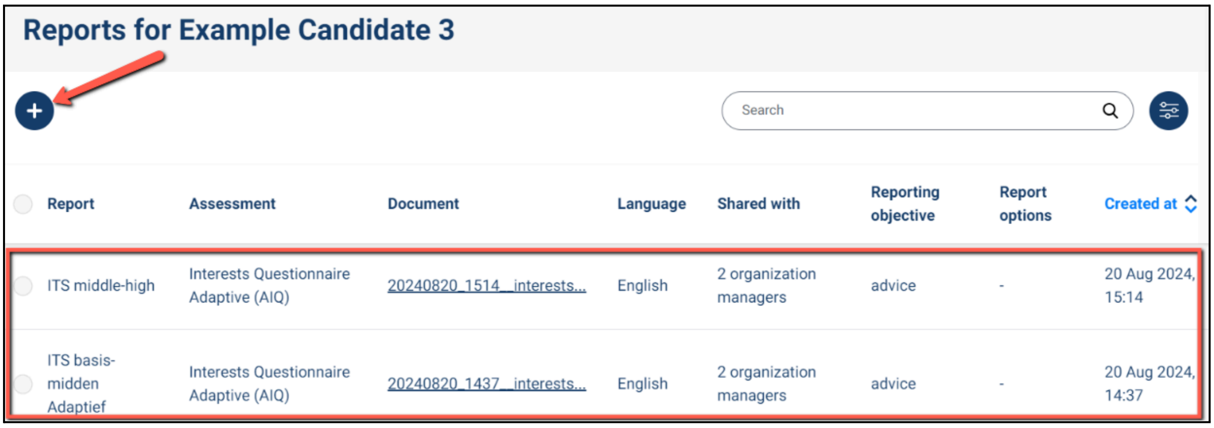
The report will then be generated and displayed on the right side of the screen.



Additionally, the report will also be available under **Documents & Media**.

NOTE: The generated report for the candidate will only be visible in your **Documents & Media** if you have the appropriate permissions to view the candidate's reports. For more information, refer to the explanation about **User Rights**.

Another option to manage and generate a report is through the **Reports** button. You can find this button in the candidate overview or when you select a candidate from the candidate list. This option allows you to generate and manage the candidate's reports.



By clicking the blue **Generate Report** button, a menu will open to generate a report. Follow the same steps as explained above: select the assessment, report type, and reporting objective, then save the report. The report will then appear in the reports overview.

1. Managing Processes

Here, you can create processes or use our standard templates. Processes can be utilized for various purposes. Examples of processes organizations might create include: a selection procedure, onboarding program for new employees, a coaching trajectory, or an e-learning course.

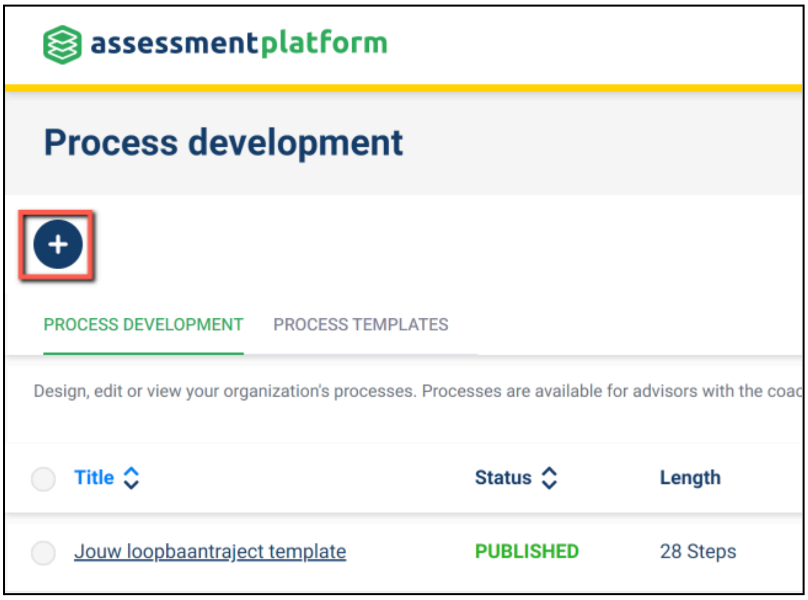
7.1 What You Can Do

- Add New Processes
- Add Existing Templates to Your Environment
- Edit and View Processes
- Change the Status of Your Processes

7.2 Adding Processes

In the "**Develop Processes**" section, you can add, edit, and publish your processes.

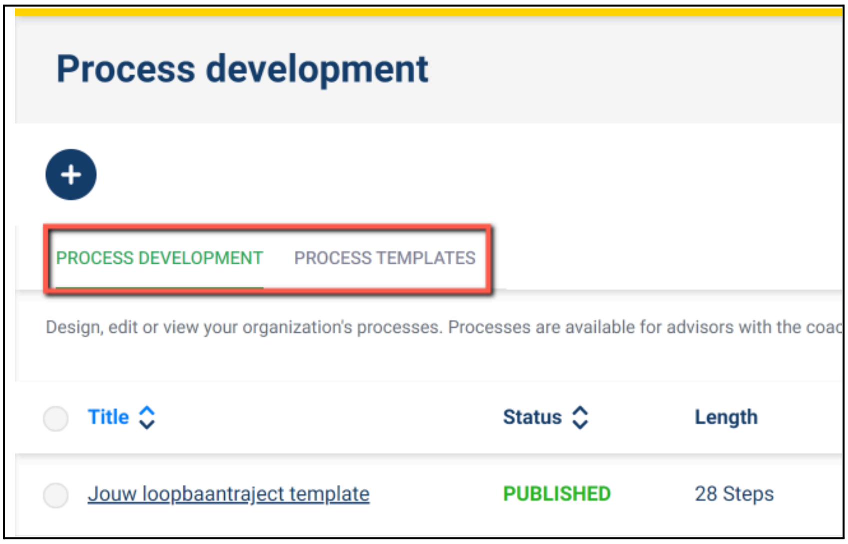
Click the **+** button to create a new process.



There are two types of processes:

1. **Ixly Process Templates**: These are example processes that you can use for your candidates or as inspiration for creating your own templates. Examples include Career Assessment, New Employee Onboarding, Selection Assessment, and Life Coaching Programs.

2. **Your Own Templates**: Under the "**Develop Processes**" section, you will find templates you have created or copied from our templates and edited as needed.



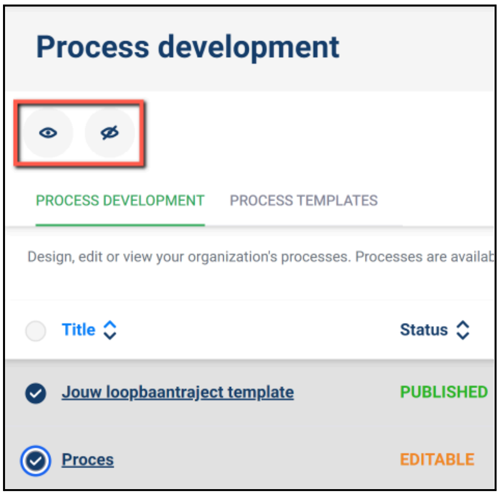
NOTE: If you have already assigned a process to a candidate, any changes made to the process will not be applied. The process will remain as it was at the time it was assigned to the candidate.

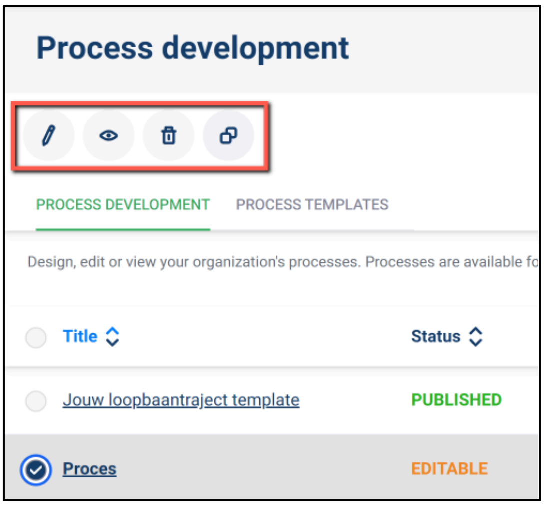
7.3 Managing processes

Here, you can perform various actions:

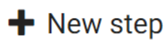
- Bulk Actions: Select multiple processes and publish or withdraw them simultaneously.
- Individual Actions: Select a single process to edit, publish, withdraw, or copy. These actions apply to your own processes.

Ixly process templates can only be copied for your own use.





7.4 Editing and Composing Processes

	Explanation	Visualisation
1	**Access Process Settings**: Click on "**Develop Processes**" in the left menu. To add a new process, click the **plus (+)** button at the top of the screen.	
2	**Configure Process Settings**: Enter a title, provide a description, choose the language, and set the order of steps for candidates to follow. Click **Save** to proceed to the process overview.	
3	**Build the Process:** In the process overview, add steps by clicking **"+ New Step"**. For each step, you can add elements by dragging them to the designated area or double-clicking them with the right mouse button. Available elements include: Reading text, Short text input, Long text input, Date input, Drop-down selection, Multiple-choice selection, Checkboxes, Quiz, Document upload and download, Document approval, Images, YouTube videos, Coach introduction, Assessment, Vacancy manager, Logbook, Appointment planner, CV & cover letter builder, Blog, HTML block.	
4	If you click **"+ New Step"** under the bottom step you have added, you can add a new step with additional elements to your process.	
5	For each element, various options become visible when you hover over the element: • **Move** (orange arrow): You can relocate the element and change its order. • **Settings** (gear icon): Access and adjust the element's settings. • **Delete** (red X): Remove the entire element. Note that deleted content cannot be recovered.	
6	Similarly, when you hover over the different steps on the left, various options appear for each step: • **Categorize** (green): Organize steps into categories or chapters. • **Reorder** (orange): Change the sequence of the steps. • **Settings** (gear icon): Adjust the step's settings, including approval settings. • **Delete** (red X): Remove the entire step.	
7	The process can only be assigned to a candidate after it has been published. To do this, click on **"Develop Processes"**, select the process by clicking the corresponding dot, and then choose **Publish**.	
8	To make changes to the process, first withdraw it in the same way. Note that this will not affect processes already assigned to candidates; those will remain unchanged as they were at the time of assignment.	

8. Managing Advisors

Here, you can manage all advisors within your organization account..

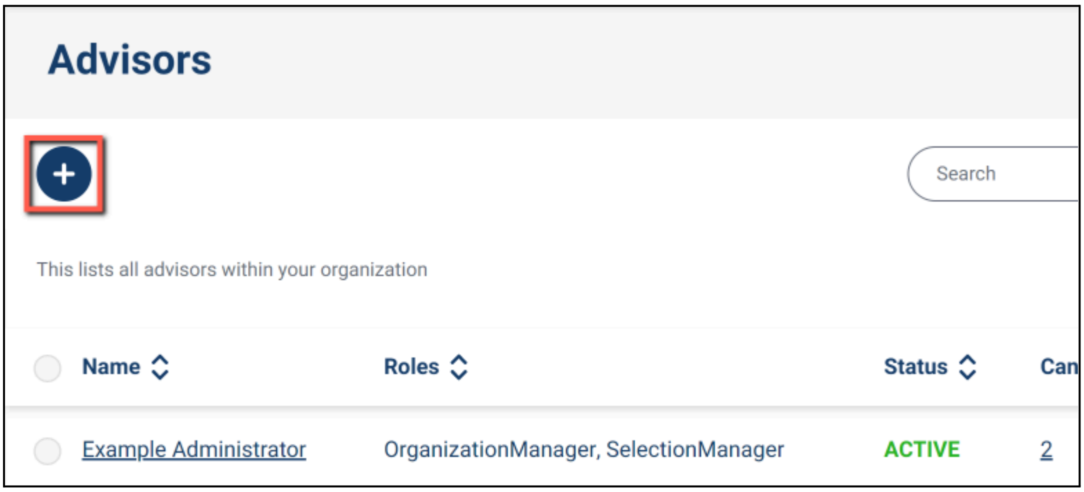
8.1 What You Can Do:

- **Add New Advisors**
- **Edit Existing Advisors**
- **Change the Status of Advisors**
- **Modify Advisor Roles** (Coach or Organization Manager)

In addition to candidates, you also have an overview of all advisors and organization managers on the platform. This overview is only visible if you have administrative rights. It functions similarly to the candidate overview.

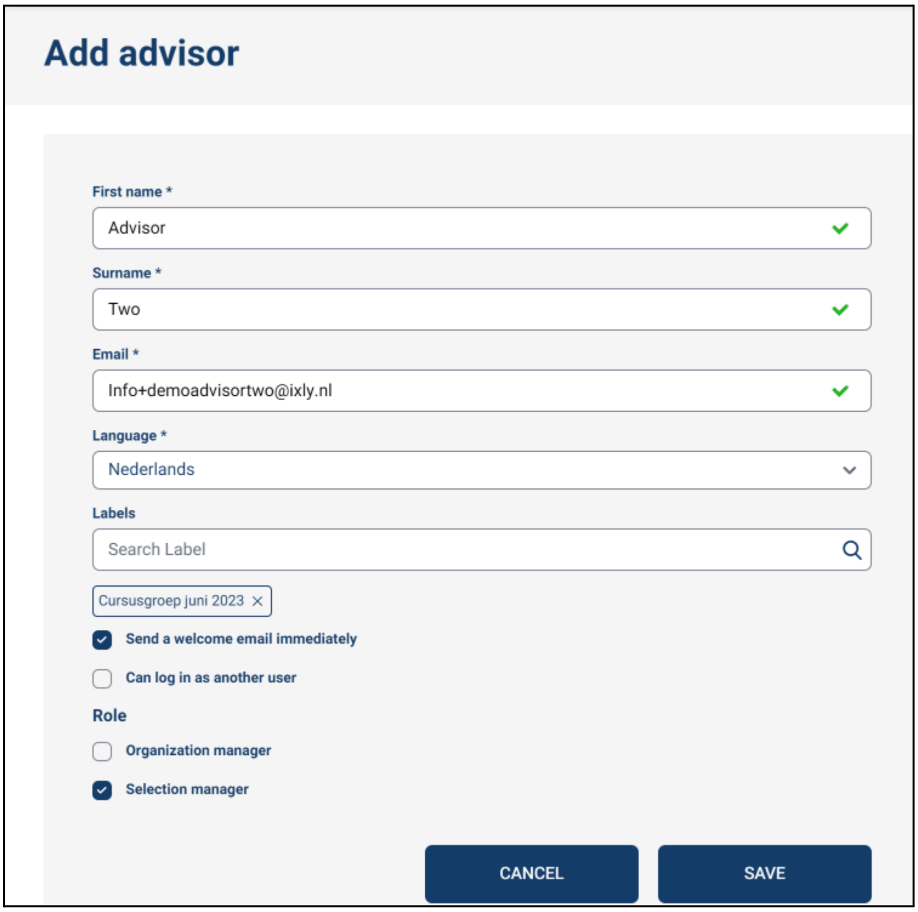
8.2 Adding Advisors

In this overview, you have several options. To add a new advisor to your organization, click the blue button with the white **+**.



Next, enter the primary details for the new advisor, such as their first name, last name, and email address. You can choose to invite the advisor to the account immediately by keeping the "**Send Welcome Email**" option checked. If you prefer to invite the advisor at a later time, uncheck this option.

You can also assign the advisor the role of **Organization Manager**, which allows them to manage organizational settings, create and modify processes, and oversee all candidates. After entering all the information, click **Save**.

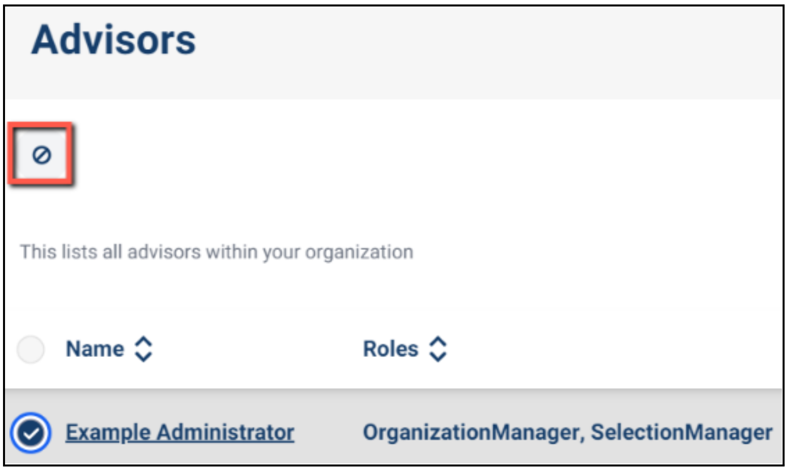


8.3 Inviting Advisors Later

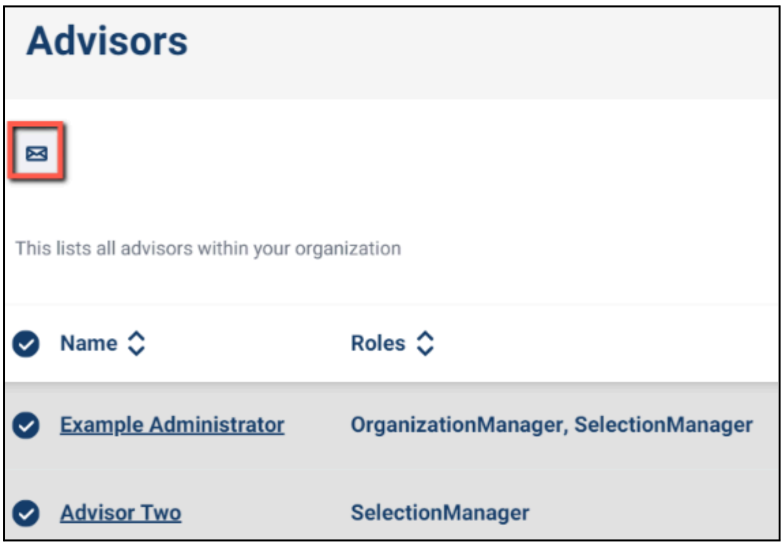
If you choose to invite the advisor at a later time, deselect the option to "**Send Welcome Email**". The advisor's status will then be marked as **Created**. When you are ready to send the invitation, click the **Invite** button.

8.4 Managing Advisors

Additionally, you can select one or more advisors. When selecting a single advisor, and if your organization's settings permit, you can log into the advisor's environment and deactivate the advisor.



If you have selected multiple advisors, you can send a welcome email to all of them simultaneously.



9.Documents & Media Library

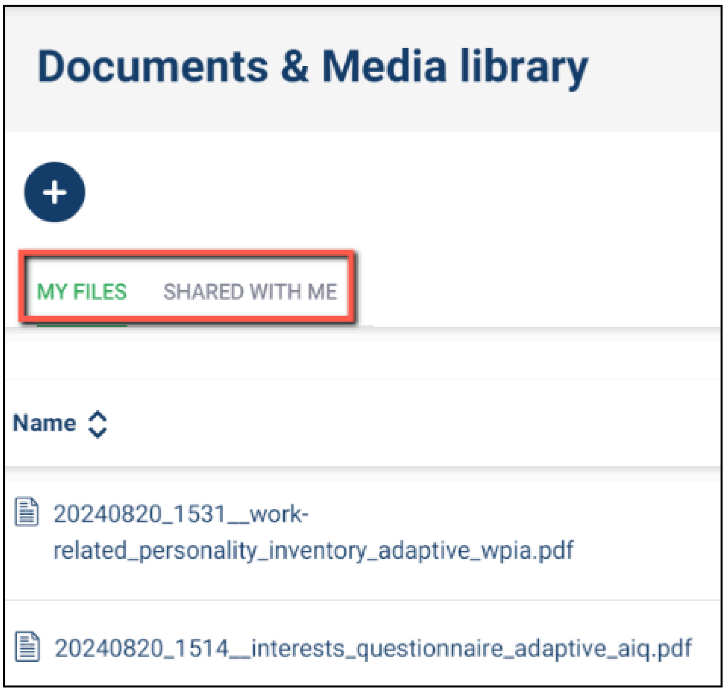
In the Documents & Media Library, you can access all your documents.

9.1 What You Can Do:

- View Reports
- Access Files from Processes Assigned to You
- Share Files with Other Users
- View Files Shared with You
- Add and Save Files

The Documents & Media Library is designed for quick and easy file storage. You can also share files with other users within your environment. This library includes files you've saved in your processes, and candidates can find assessment reports here as well.

9.2 Adding New Files



Documents are categorized into **"My Files"** and **Files Shared with Me**. To add a file, click the blue button with the white **+**. A window will appear on your screen showing your files. You can then select and add the desired file.

9.3 Managing Files

By clicking on a file, you can perform various actions. For example, with the report for Bert Bakker, you can share, download, and view its associations, such as its linkage to the WPV process.

You also have the option to see who the report has been shared with via "**Shared With.**" In this case, the document has been shared with Jan Voorbeeld and a removed candidate.

10.News

The news page is used for sharing news within your environment and following updates from Ixly.

10.1 What You Can Do:

- **Compose and Share News**: Create a news post and share it with a group of users within your environment.
- **Follow News from Ixly**: Stay updated on news, including updates and changes from Ixly.

Under the **"News"** option in the menu, you can view blog articles, which are also available via your notifications. Additionally, you can share information with your candidates or users.

10.2 Adding a News Post

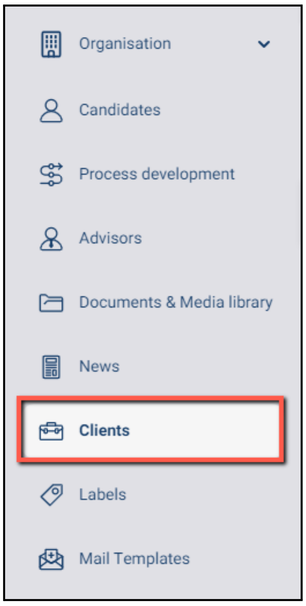
Click the blue button with the white **+** to view which news posts have been shared with you, which have been shared with your candidates, and which are shared with everyone in your organization account.

When you want to create a new article for your participants or your organization, you can add it under **"For Your Own Candidates"** or **"For XXX Organization."** Add the article by clicking **"New Article."**

Next, you can manage the article by editing it, setting sharing rules, or deleting it.

11. Clients

Clients are organizations to which you can link contacts. A contact can be assigned to a candidate, allowing them access to files in approval elements, such as viewing an end report.



When to Use This Option: For example, if you are conducting an assessment on behalf of an organization and want to share the final report with the client, or in a sick leave process where you do not want the client to see the process content but still receive the final report.

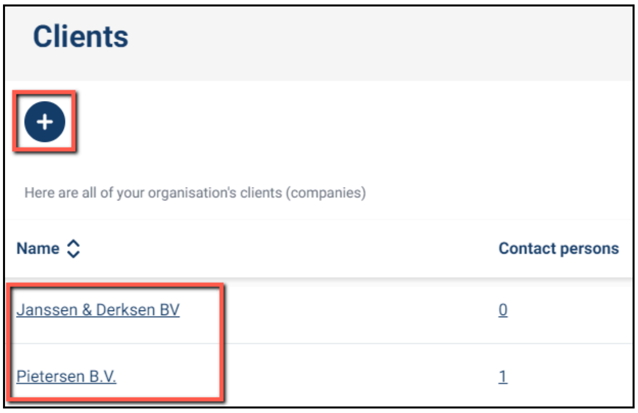
11.1 What You Can Do:

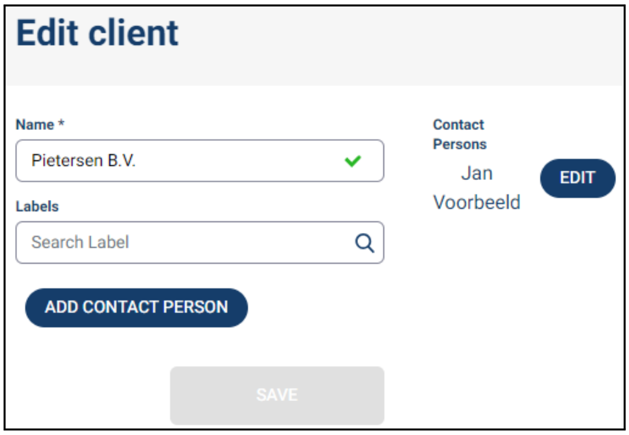
- Add Clients
- Link Contacts to Clients
- Edit Existing Clients and Contacts

11.2 Adding and Editing Clients

You can link a client and a contact from that client to a candidate, allowing the contact to have limited insight into the candidate's progress and enabling document sharing and approval.

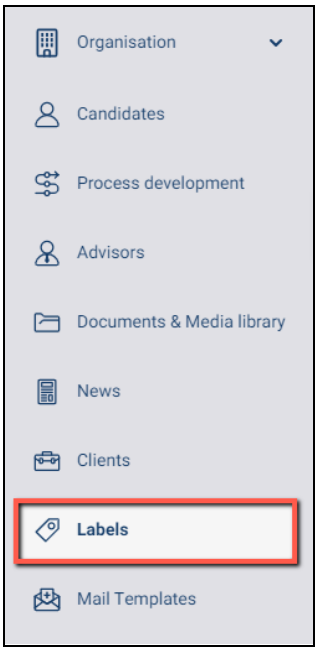
In the Clients screen, you can add a new organization or click on an existing organization to edit it. You can then add new contacts or modify existing ones.





12. Labels

In the Assessment Platform, you have the option to use labels. While it is not mandatory, we highly recommend making use of labels for better management.



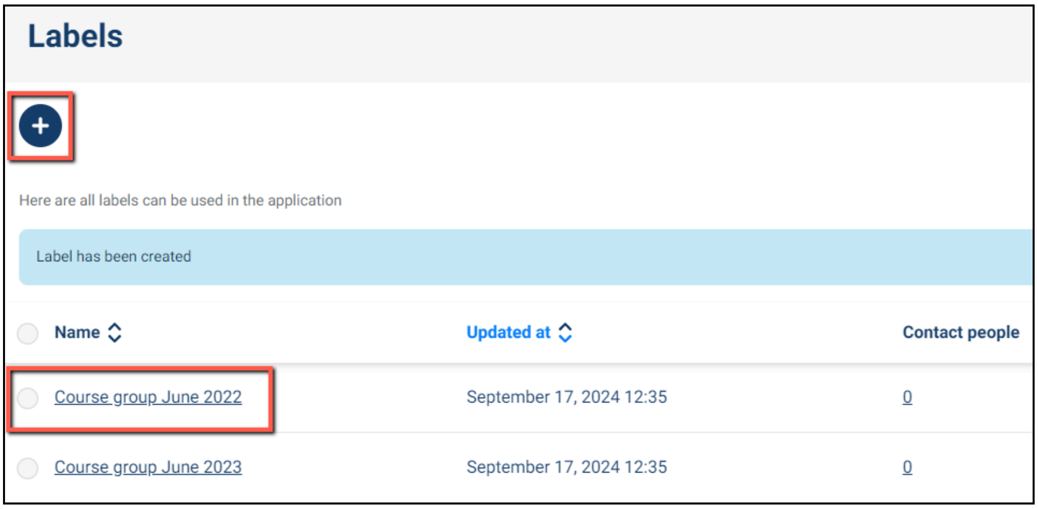
Benefits of Using Labels: Labels facilitate bulk actions, allowing you to make changes for a group based on the labels assigned to them.

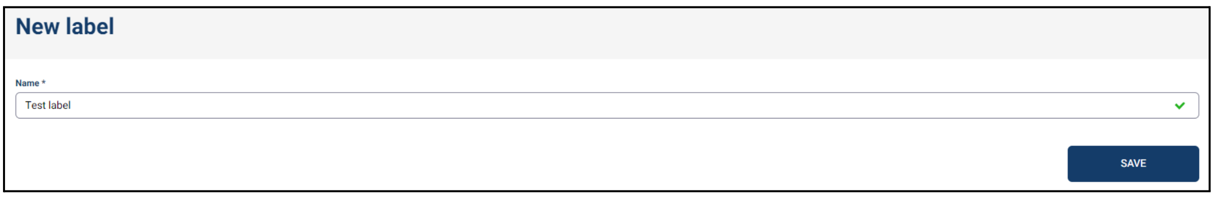
12.1 What You Can Do:

- Add New Labels
- View the Number of Users Assigned to Each Label

12.2 Adding and Editing Labels

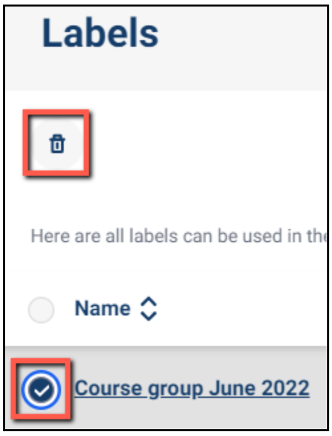
In this overview, you can add new labels and modify existing ones by clicking on them.





12.3 Deleting a Label

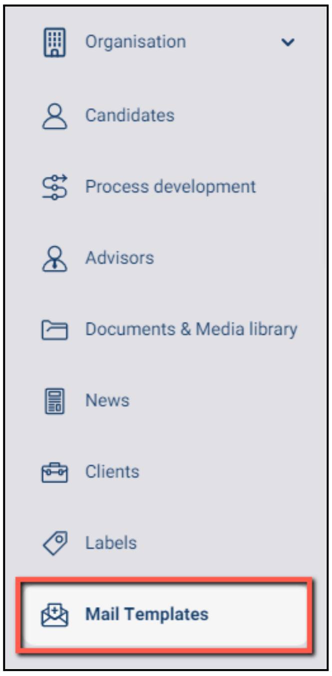
To delete an existing label, select the label you wish to remove. A small trash can icon will appear at the top of your screen; click this icon to delete the label.



Especially if you use the system on a large scale, we recommend applying labels. This will help you to more easily organize and structure your candidate overview

13. E-mail Templates

The "E-mail Templates" section in the menu allows you to add new e-mail templates and modify existing ones. Almost everywhere you can send an e-mail to your candidate, you have the option to choose a template first. These templates can be fully customized to suit your needs.

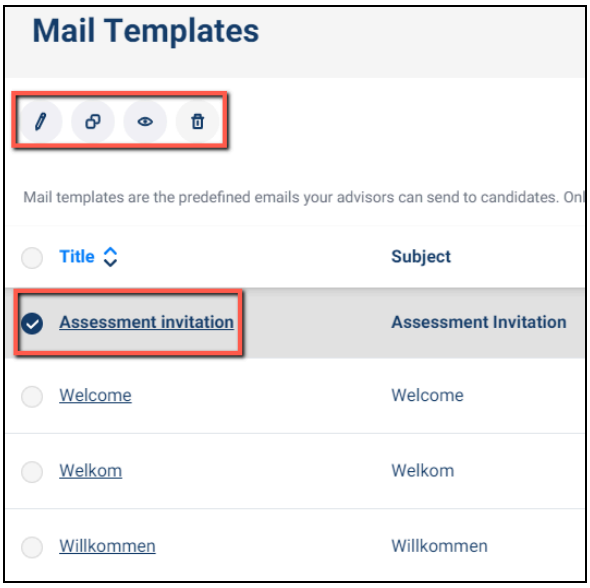


13.1 What can you do?

- Add new e-mail templates
- Modify existing templates
- Adjust the status of your templates

13.2 Managing E-mail Templates

In the e-mail templates screen, you can add a template. By selecting one of the templates, you will see the option to modify, copy, publish, withdraw, or delete the template. You can also click on the desired template to view a preview.

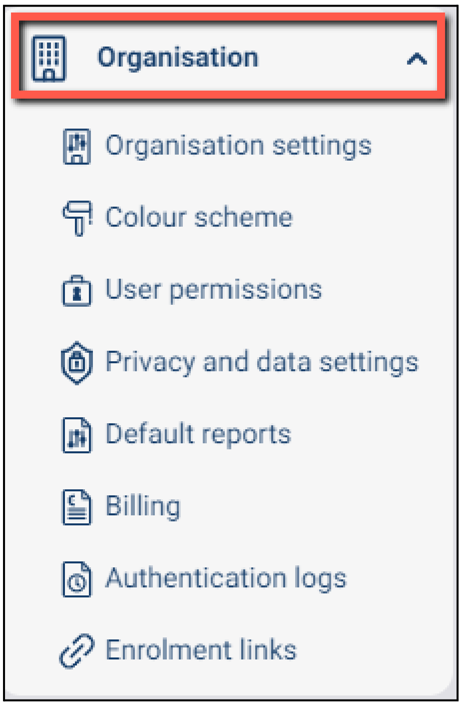


TIP: Make sure the templates you want to use are published. Otherwise, they won't appear in your template list, and you won't be able to use them for your candidates.

14. Organization

The organization menu consists of a submenu. Below, we briefly outline the functionalities available and what you can do in each submenu section.

Do you have a specific question about a setting or need assistance? Feel free to contact us!



15. Organization Settings

In the organization settings, you can modify the basic settings of your organization account.

15.1 What can you do?

- Edit the name of your organization
- Change the language of your environment
- Adjust the default settings for report objectives (selection or advisory)
- Add a logo
- Determine in which languages you want the environment to be available
- Set whether you want the blog to be visible within your organization (Show Blog)
- Set whether you want the results page to be visible within your organization (Show Results)
- Select a default email template that will always be displayed first

15.2 Name and Language Settings

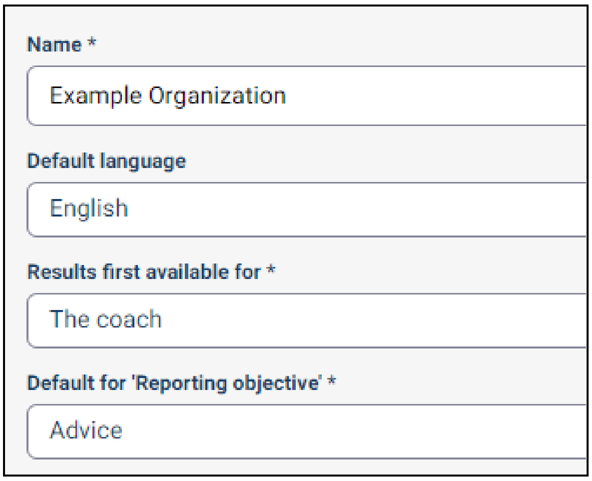
Within the organization settings, you can change the name of your organization and select the organization's language. The selected language will be the default setting for new users within the organization. If a user's language is disabled, the language settings will automatically switch to the organization's language.

15.3 Report Settings

The settings that determine who sees a report first ("results first available to") affect who will see the report after the assessment is completed. If the candidate sees it first, they must consent before sharing the report with the advisor. If the advisor sees it first, they can share it with the candidate at any time. You can also choose to give both direct access. If "advisor" is selected, the advisor can choose this per assessment. This can always be adjusted per assessment when editing a process.

The default setting applies to the situation in which the assessment is conducted. The default setting for "Report Objective" is "Advisory." The chosen default setting determines which target group the candidate is compared against. For selection purposes, we recommend using the "Selection" target group, and for development purposes, we recommend selecting the "Advisory" target group.

NOTE: If you make your environment available in multiple languages, the processes will not automatically be set in these languages.



15.4 Available Languages

In addition to your organization's language, you can also select which languages you want to be available within your organization. When adding a new candidate, you will then have the option to choose from these languages. Other users within the organization can also select from the available languages to set the primary language for their own user environment.

15.5 Results Page

You can also choose whether to make the results page available to your candidates by clicking on “Show Results.” The Show Results page displays a graphical representation of a candidate's test results. The “Show Blog” option allows you to decide whether or not to display the blog. Finally, you can upload your organization’s logo.

16. Color scheme

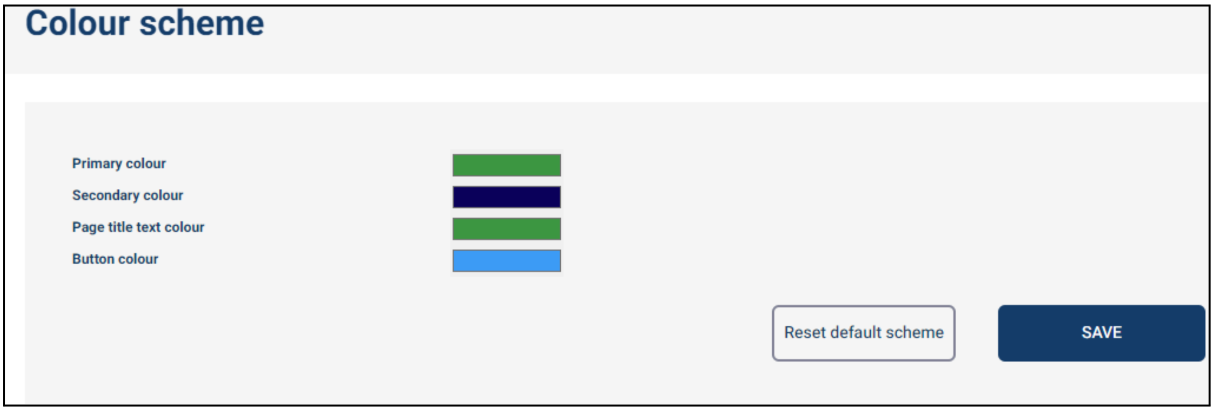
You can change the color scheme of the interactive results page for all users here.

16.1 What can you do?

- Adjust the colors of the text, titles, and icons

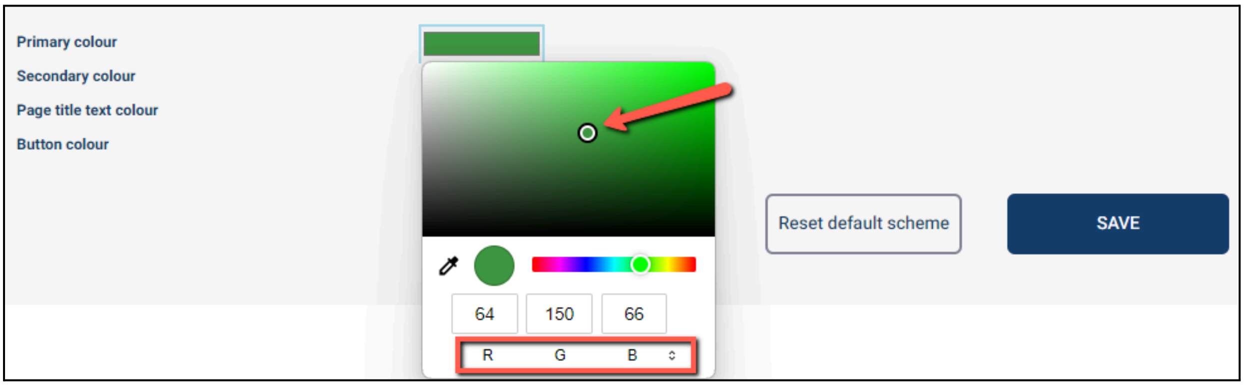
16.2 Setting Colors

Here, you have the option to customize the colors of the interactive results page to match your organization’s color scheme. You can also revert these changes if needed, restoring the colors to their original settings.



16.3 Selecting Colors

By clicking on the color bar, you can change the color of the desired element. Colors can be adjusted using the color code options: RGB, HSL, or HEX. It is also possible to select the desired color directly from the gradient. After you have modified the colors, click on “Save” to keep the changes.



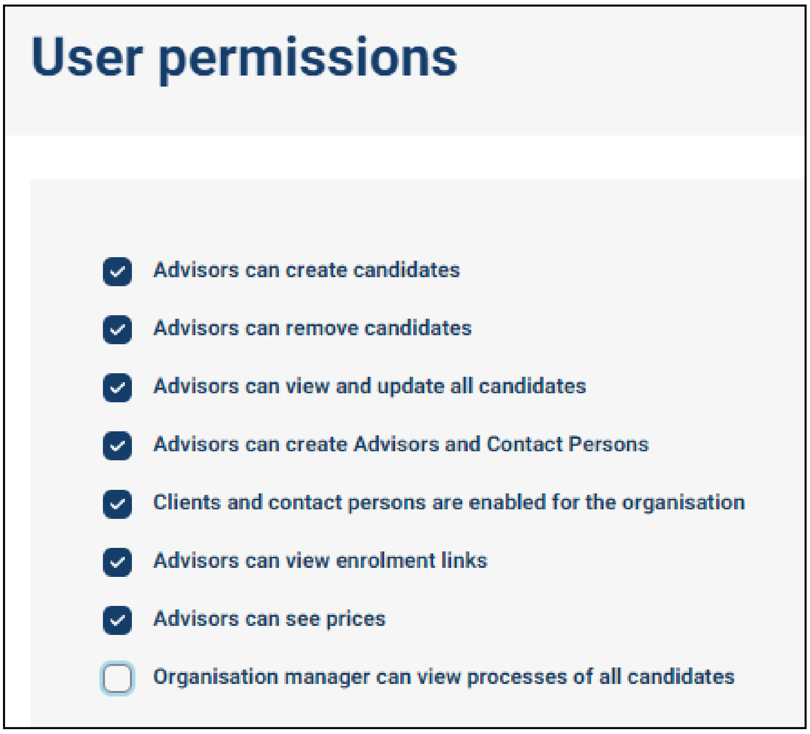
17. User rights

Here, you can restrict which user roles have access to specific parts of the environment.

17.1 What can you do?

- Determine whether advisors can create participants or not
- Set the rights of advisors regarding viewing and editing participants
- Configure whether you want to use clients within the organization
- Decide if process coaches can view registration links
- Determine if advisors can see pricing information
- Specify if organizational managers can view everything about all candidates

In the user rights settings, you can define the permissions for your advisors, as well as for contacts, process coaches, and the rights you have as an organizational manager.



18. Privacy and data retention

Here, you determine whether two-factor authentication is mandatory for different roles, how long you want to retain data, and whether you grant permission for advisors to log in as users.

18.1 What can you do?

- Determine who within the organization must use two-factor authentication
- Set the period after which advisors are deactivated
- Set the period after which candidates are deactivated
- Define the retention period for personal data
- Grant Ixly rights for support within your environment
- Allow users within your organization to log in as another user

18.2 Two-Factor Authentication (2FA)

By enabling two-step verification (2FA), you add an extra layer of security to your organization. As an organization administrator, you can decide who this requirement applies to.

18.3 Advisor Deactivation Period

The period of inactivity after which advisors are deactivated. Advisor data will still be retained. Re-activating an advisor allows their account to be used again.

18.4 Candidate Deactivation Period

The period of inactivity after which candidates are deactivated. Candidate data will still be retained. Re-activating a candidate allows their account to be used again.

18.5 Data Retention Period

According to the General Data Protection Regulation (GDPR), personal data must not be retained longer than necessary. To comply, inactive candidates, advisors, and contacts are automatically removed based on the chosen retention period. This retention period also applies to assessments and generated reports. The maximum retention period is two years.

18.6 Log in as Another User

If you enable this option, advisors with 'log in as' rights can access the (candidate) accounts they manage.

18.7 Allow Ixly Support

If you enable this option, you grant Ixly support staff the ability to view your users' accounts to resolve issues reported to the helpdesk.

19. Default Reports

19.1 What Can You Do?

You can select a standard report for each available assessment.

19.2 Standard Report

For all assessments available within your organization, you can set a default report. The preferred report, once configured, will be automatically generated when a candidate completes an assessment. Options for the standard report may include choosing between a short or detailed report or selecting a specific language. The available options vary depending on the assessment.

Name	Key	Language	Default Report
Work-related Personality Inventory Normative (WPI-N)	form_wpv_en	English	WPI Extensive [en] (+ 35 credits)
Work-related Personality Inventory Ipsative (WPI-I)	form_wpvi_en	English	
Work-related Personality Inventory Adaptive (WPIA)	form_wpv_adap_en	English	
WorkXperience Scan	form_werkbeleving	Dutch	

WPI Extensive [en] (+ 35 credits)
WPI Short [en]
WPI Short [nl]
WPI Extensive [nl] (+ 35 credits)
WPI Short [de]
WPI Extensive [de] (+ 35 credits)
WPI Short [fr]
WPI Extensive [fr] (+ 35 credits)

If available, a detailed report is set as the default. A detailed report provides more textual explanation of the assessment results. This is possible, for example, with the Work-Related Personality Questionnaire (WPQ). When you select a short report, only the results are displayed in a graphical format without textual explanation. In addition to the report length, you can also set the default language for the report. The language options depend on the languages in which the report is available.

As shown below, it is also possible to select a default report in a different language for an assessment.

Adaptive Talent Development Assessment	prog_tda_adap_en	Engels	Talent Development Assessment [nl]

Tip: The default report specifies which report is automatically generated. However, you can still choose to generate a different report later on, such as one in a different language.

20. Billing

20.1 What can you do?
Authorize a new bank account via iDeal
Order credits

20.2 Ordering credits with an occasional subscription
In the Assessment Platform, when using an Occasional subscription, you can order credits to purchase assessments for candidates. The Occasional subscription works as a prepaid subscription.

To order credits, go to the "Billing" section under the "Organization" menu. If you're using a new account on the Assessment Platform, no bank account will have been set up yet to deduct credits. To be able to order credits, it's important to authorize a bank account first. You can do this by clicking on the relevant link. Then click the "Go to payment screen" button. A screen will open allowing you to make a €0.10 payment via iDeal. The account is now authorized.

20.3 Ordering Credits
On the billing page, you'll see an overview of the available credits on the left-hand side of the screen. To order credits, first select the desired credit bundle and then click "Add." You will then be taken to a page where you can see an overview of the order with the associated costs. To confirm the order, click "Go to payment screen." You can complete the order through iDeal or by invoice. Once this is done, you'll see that the number of credits on the billing screen on the left has increased by the number of credits you just purchased.

Note: You can only order credits if you have an Occasional subscription for our assessments. With a Frequent or Intensive subscription, you will receive a monthly invoice for the assessments used.