HR DELIVERY / STEP-BY-STEP SERIES

Assessment

B1

PORTAL USER GUIDE

Learn to select assessments, prepare participants, manage allocations, interpret individual and combined reports, use practitioner resources and plan a sound behavioural or technical assessment build.

01 PREPARE

02 FOLLOW

03 CHECK

INTRODUCTION

OPEN SOURCE

A practical guide to assessment

Work from a specific question: what decision or development conversation needs better evidence? This guide follows that question through selection, participant preparation, allocation, completion, interpretation and follow-up.

The public catalogue and selector were exercised directly. The portal's published demonstration shows Choose an assessment, Run assessments, Manage & report, Resource library and Meet Zayd. Protected participant, allocation, scoring and builder forms were not entered; the relevant tasks explain the described workflow without inventing private controls.

WHO THIS GUIDE IS FOR

Assessment administrators • Qualified practitioners and feedback facilitators • HR development and talent teams • Managers using authorised reports

WHAT YOU CAN DO

01 Choose a focused instrument or combined pathway for a defined purpose

02 Use filters, recommendations, factsheets and example reports

03 Prepare participants and an administration plan

04 Review completion, individual reports and organisation reporting

05 Plan behavioural, technical and combined competency builds

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In this guide

Use the chapter pages to find a task. Follow each numbered sequence and check the result before continuing.

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FOREWORD

A note from Dr Phillip

Start with the question, prepare the person carefully, and turn the findings into a constructive next step.

DR PHILLIP

HR Delivery

Assessment is most valuable when it starts with a thoughtful question and ends with a useful conversation. A score or profile can bring structure to the evidence, but its meaning depends on the purpose, the context and the quality of the administration. These decisions deserve attention before anyone begins an assessment.

This guide takes you through the practical work around the Assessment Department Portal. Use the selector and factsheets to understand the options, confirm the appropriate level and prepare participants clearly. Keep allocations and completion records accurate. When results become available, read the relevant guidance and consider the evidence alongside other information about the work.

The aim is an informed next step: a better development priority, a more focused interview, a clearer team conversation or a carefully supported readiness review. Give participants the opportunity to understand their findings and translate them into action. Lama can help you reach the right resource or arrange specialist guidance when the purpose or pathway needs further thought.

Proposed wording for Dr Phillip's review

YOUR FIRST POINT OF CONTACT

Meet Lama

OPEN SOURCE

Lama can help you reach the Assessment Department, identify the appropriate enquiry route and arrange a conversation about selection, administration or feedback. Give her the intended purpose, audience, approximate participant numbers and timescale. If you already use the portal, identify the task or resource you need. She can route the request to the right support; avoid sending participant reports or unnecessary personal information through a general first-contact message.

ASK LAMA TO HELP WITH

- Assessment selection enquiry
- Portal access and allocation support
- Practitioner and feedback resources
- Behavioural or technical build enquiry

HAVE THESE DETAILS READY

- Purpose: development, selection, succession or team effectiveness
- Individual or team audience and approximate numbers
- Role levels, career families and language needs
- Timing, feedback plan and specific access issue

OPEN LAMA'S RECEPTION

hr.delivery

SIGNING IN / STEPS 1–2 OF 4

OPEN SOURCE

Sign in and check your workspace

01 Open the correct department entry

Use the portal link in this guide or select the department from All department portals. Check the heading before entering anything.

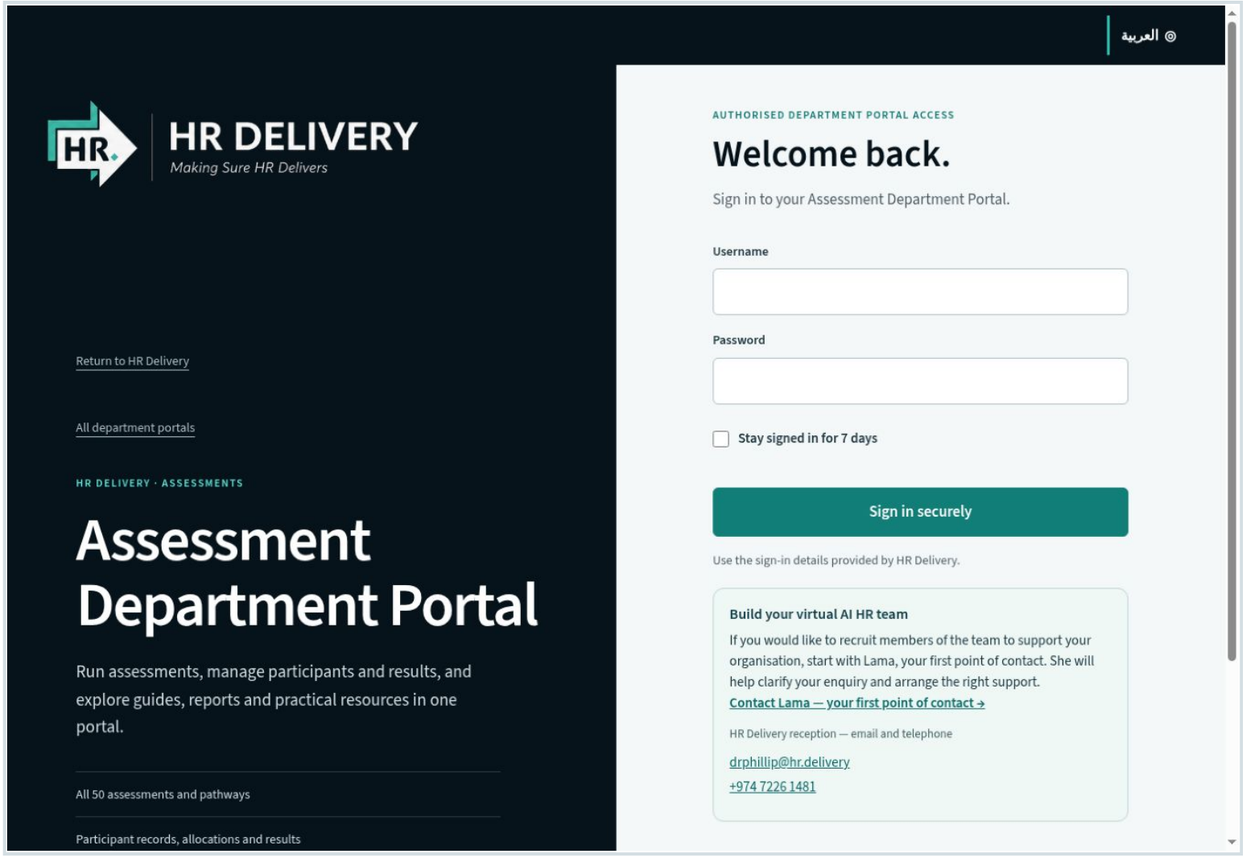
CHECK The sign-in heading identifies the intended department.

02 Enter your issued sign-in details

Enter your organisation’s account identifier in 'Username' and your password in 'Password'. Do not copy credentials into project notes or screenshots.

CHECK Check both entries privately and retain the case supplied by HR Delivery.

CURRENT LIVE SCREEN



Current Assessment portal sign-in screen. No client records are visible.

SIGNING IN / STEPS 3–4 OF 4

OPEN SOURCE

Sign in and check your workspace

03 Choose the session option

'Stay signed in for 7 days' is optional. Use it only on a private device managed under your organisation’s access practices.

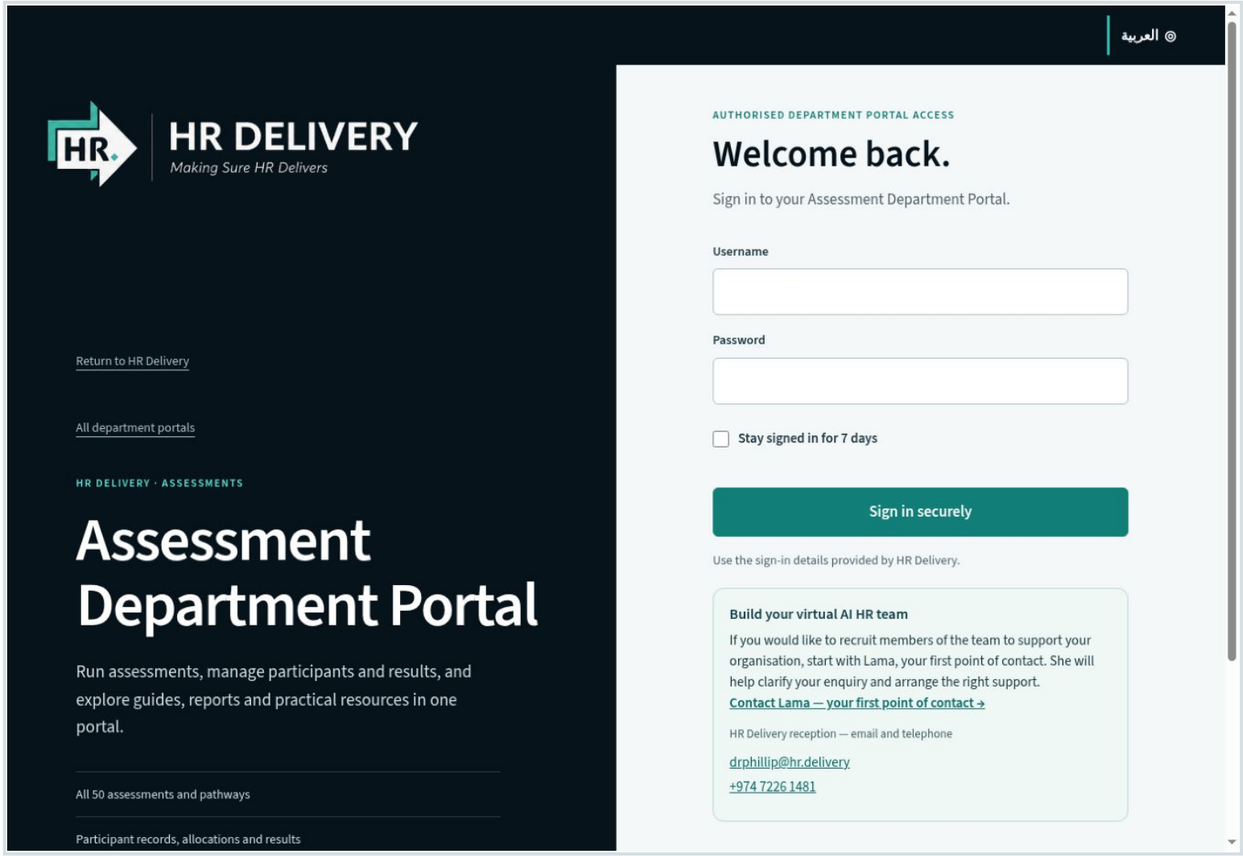
CHECK The checkbox reflects your intended session preference.

04 Select the sign-in control

Select 'Sign in securely'. If access is refused, check the department, account and entitlement with Lama.

CHECK After access is accepted, confirm your client/workspace name before opening records.

CURRENT LIVE SCREEN



Current Assessment portal sign-in screen. No client records are visible.

BEFORE YOU START

OPEN SOURCE

Access and working context

01 Use the account issued for your organisation and authorised responsibilities.

02 Department access and access to a private client workspace are separate checks; do not assume another portal's session carries across.

03 Public examples use illustrative records. Replace them only in your authorised workspace.

The current access screen was inspected. The authenticated private workspace was not entered in this review. Public tools and official demonstration screens support the steps identified below; private transactions remain source-described.

YOUR WORKFLOW MAP

How the tasks connect

Follow the sequence for a complete piece of work, or go straight to the chapter you need.

01

Select the right assessment

PAGE 010

02

Prepare and allocate

PAGE 019

03

Completion and monitoring

PAGE 032

04

Read, combine and discuss results

PAGE 041

05

Build competency assessments

PAGE 054

06

Resources and feedback

PAGE 067

Each task: prepare the inputs, follow the numbered steps, then confirm the output and the checks.

01 Select the right assessment

Move from the evidence question to an informed shortlist.

02 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

SELECT THE RIGHT ASSESSMENT / B-01-01

OPEN SOURCE

Explore the catalogue and factsheets

Find an instrument and understand its purpose before allocation.

WHO USES THIS Practitioner or assessment administrator

BEFORE YOU BEGIN

- A defined evidence question
- Intended participant group and role level

WHAT YOU WILL HAVE

- Informed assessment shortlist
- Preparation and interpretation requirements

CHECK BEFORE YOU FINISH

- The intended purpose is supported
- The correct maturity level/family is considered
- An example report is not a participant result

Search finds no suitable instrument	Clear the search and review the relevant family. Use Help me choose or discuss the evidence question with the practitioner.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public factsheets and report previews were inspected; no assessment was completed.

SELECT THE RIGHT ASSESSMENT / STEPS 1–2 OF 5

OPEN SOURCE

Explore the catalogue and factsheets

01 Choose 'Explore the catalogue'

On the Assessment website, use the catalogue view. The public catalogue lists 47 options: 34 named instruments and 13 combined pathways.

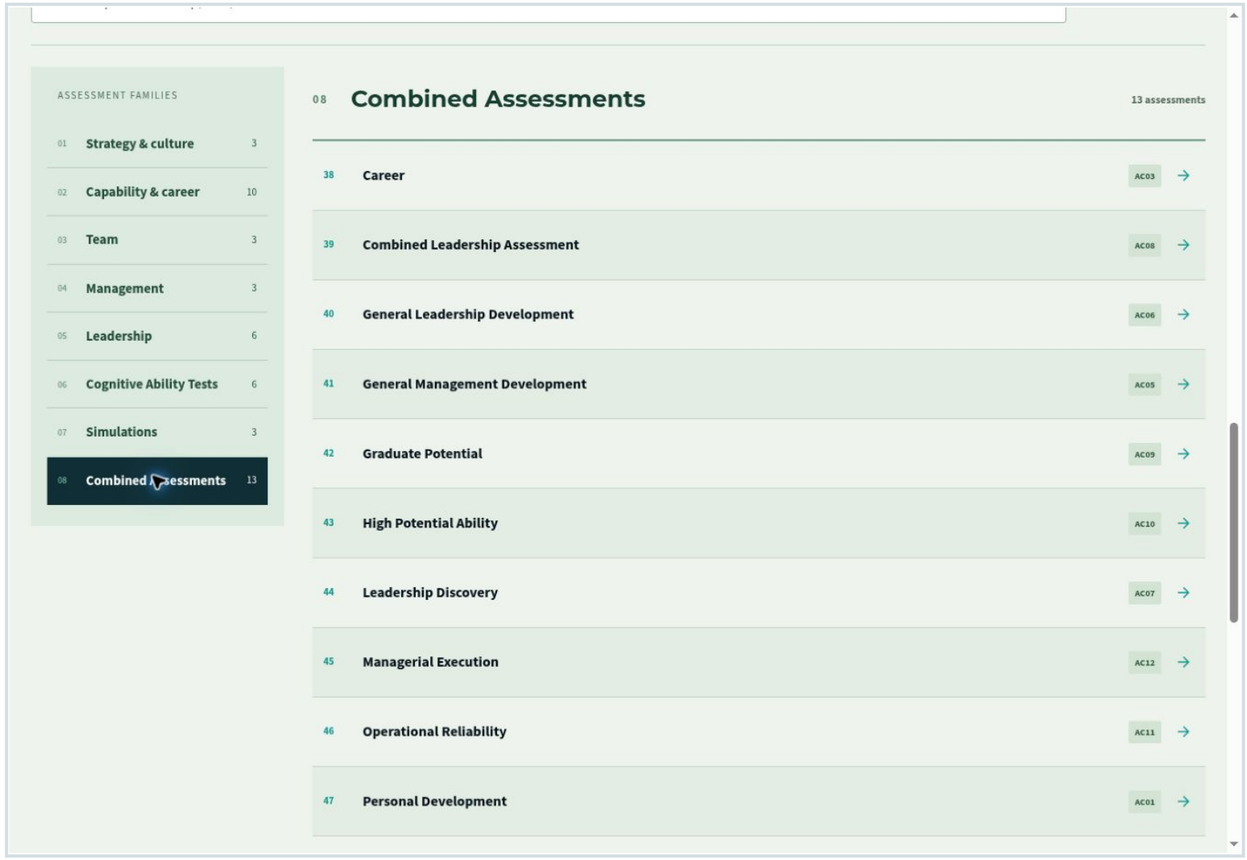
CHECK Assessment families and the search box are visible.

02 Select a family or search

Choose the relevant family or use 'Search by assessment name or code'. For example, Capability & career contains Full Career, Behavioural and Technical Competency assessments.

CHECK The list narrows to the family or search term.

PRIOR REVIEWED SCREEN



Previously reviewed public catalogue: assessment-family navigation and the combined-pathway list.

SELECT THE RIGHT ASSESSMENT / STEPS 3–4 OF 5

OPEN SOURCE

Explore the catalogue and factsheets

03 Open the named assessment

Select the assessment card. Read Typical completion time, Professional use, What it is and What participants complete in the on-screen factsheet.

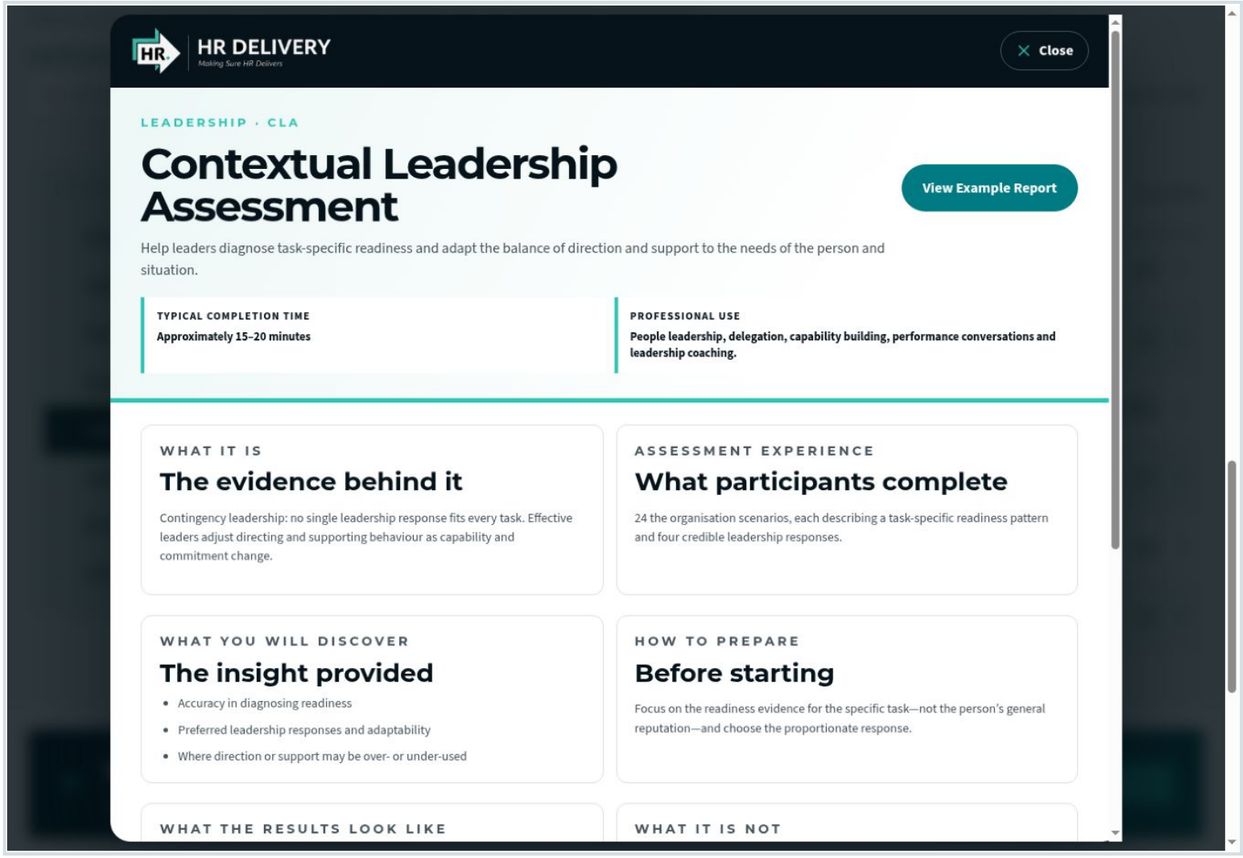
CHECK The factsheet explains the experience and evidence basis.

04 Read the preparation and boundaries

Review Before starting, Professional output and Responsible boundaries. Confirm the assessment addresses your question and does not imply an unsupported decision.

CHECK You understand what the result can and cannot establish.

PRIOR REVIEWED SCREEN



Previously reviewed Contextual Leadership Assessment factsheet. Check the current edition when opening it.

SELECT THE RIGHT ASSESSMENT / STEPS 5–5 OF 5

OPEN SOURCE

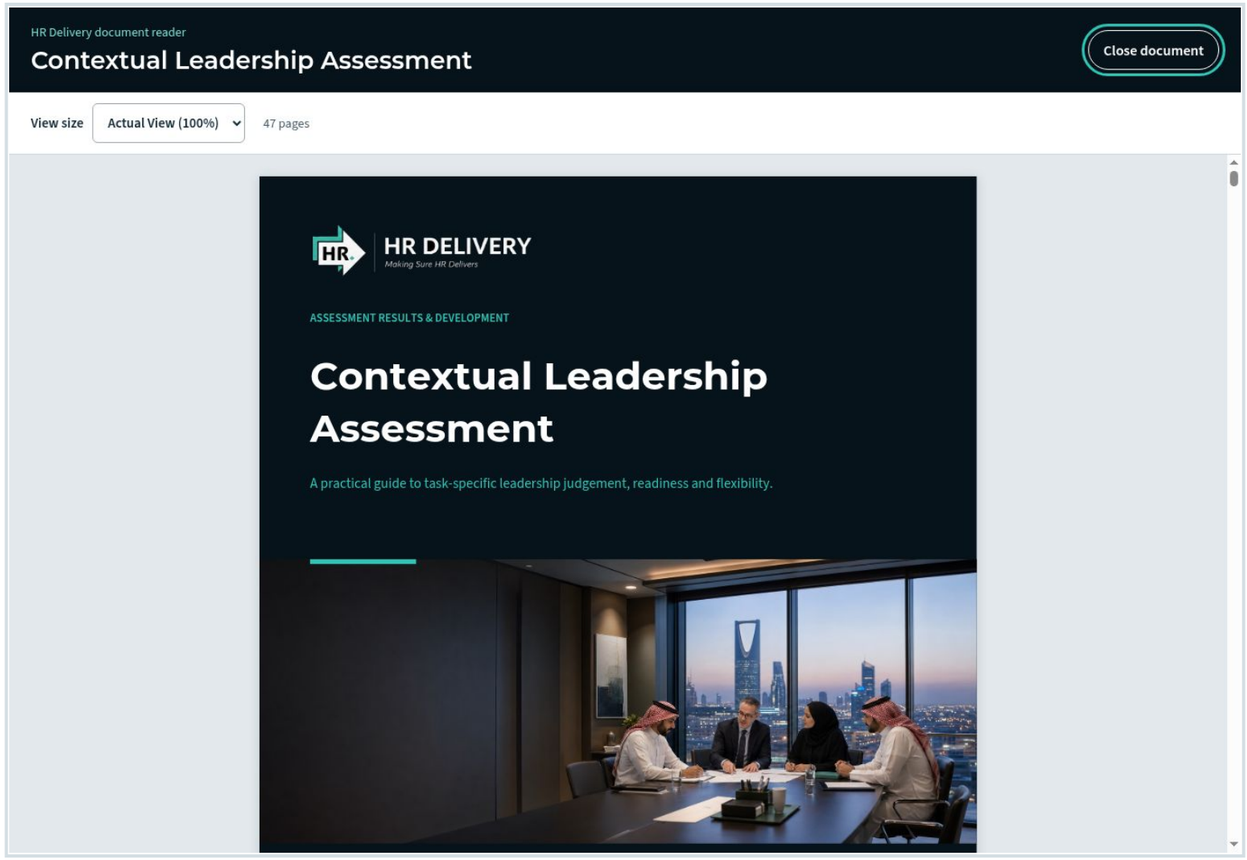
Explore the catalogue and factsheets

05 Use 'View Example Report'

Open the example to inspect its structure and interpretation approach. Select Back to factsheet when finished, then Close factsheet to return to the catalogue.

CHECK The expected report style is understood before participant use.

PRIOR REVIEWED SCREEN



Previously reviewed Contextual Leadership example-report reader; use the current report edition in your browser.

SELECT THE RIGHT ASSESSMENT / B-01-02

OPEN SOURCE

Use the assessment recommendation tool

Generate a reasoned shortlist from the intended use.

WHO USES THIS Practitioner or HR lead

BEFORE YOU BEGIN

- Evidence purpose
- Audience and role level
- Desired breadth of assessment

WHAT YOU WILL HAVE

- Reasoned shortlist
- Selected assessment rationale

CHECK BEFORE YOU FINISH

- The audience is correct
- The decision purpose matches the use
- Recommendations are professionally reviewed

No recommendations appear	Complete the area, audience and intended-use questions. Then check the remaining selections and try Show suitable assessments again.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The selector was exercised with synthetic choices; no allocation or participant record was created.

SELECT THE RIGHT ASSESSMENT / STEPS 1–2 OF 6

OPEN SOURCE

Use the assessment recommendation tool

01 Choose 'Help me choose'

Open the Assessment Selection Studio. Decide whether you need a focused assessment or a broader combined pathway before completing the form.

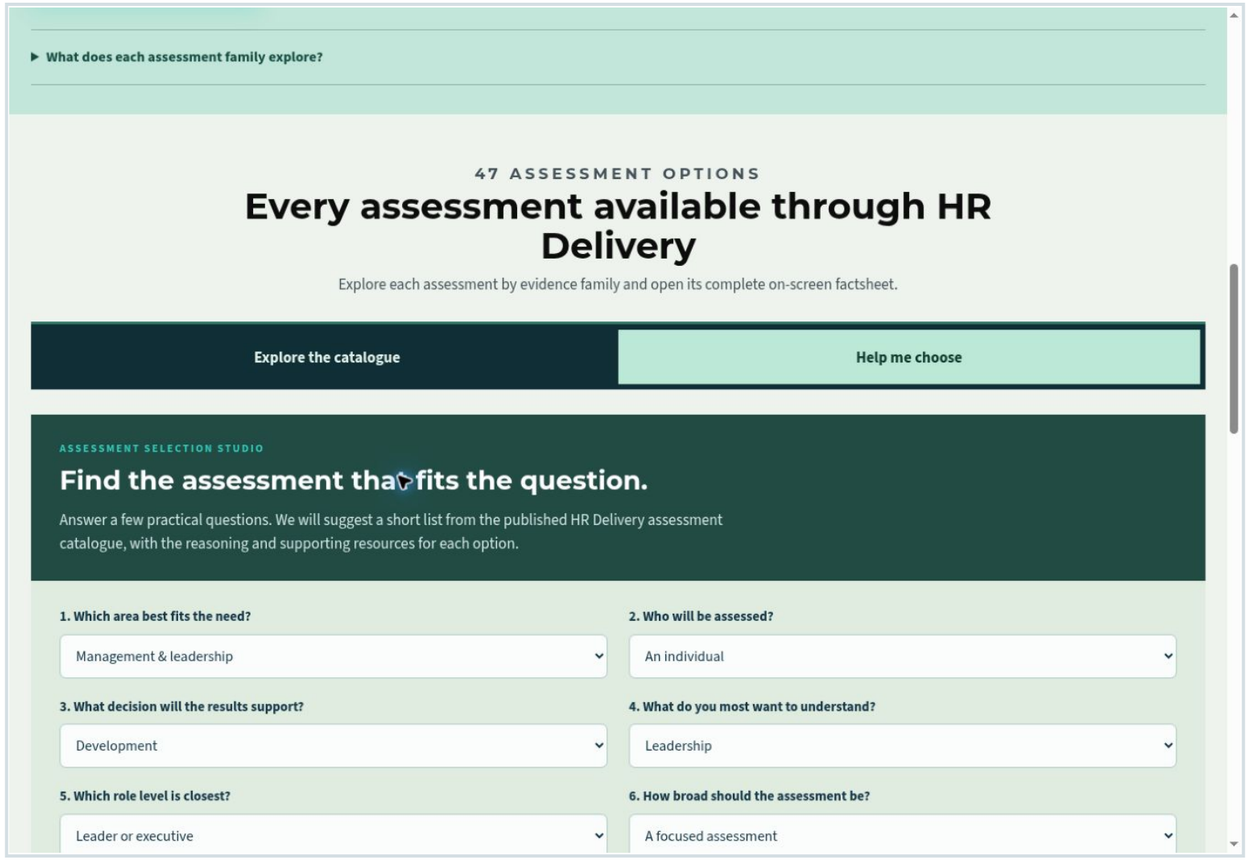
CHECK Eight selection questions appear.

02 Complete the first three questions

Choose the area, 'Who will be assessed?' and 'What decision will the results support?'. The audience options are An individual and A team.

CHECK Area, audience and intended use are selected.

CURRENT LIVE SCREEN



Current recommendation form with synthetic leadership-development selections.

SELECT THE RIGHT ASSESSMENT / STEPS 3–4 OF 6

OPEN SOURCE

Use the assessment recommendation tool

03 Specify the main question and level

Choose what you most want to understand and the closest role level. Use All role levels only when a more specific option is inappropriate.

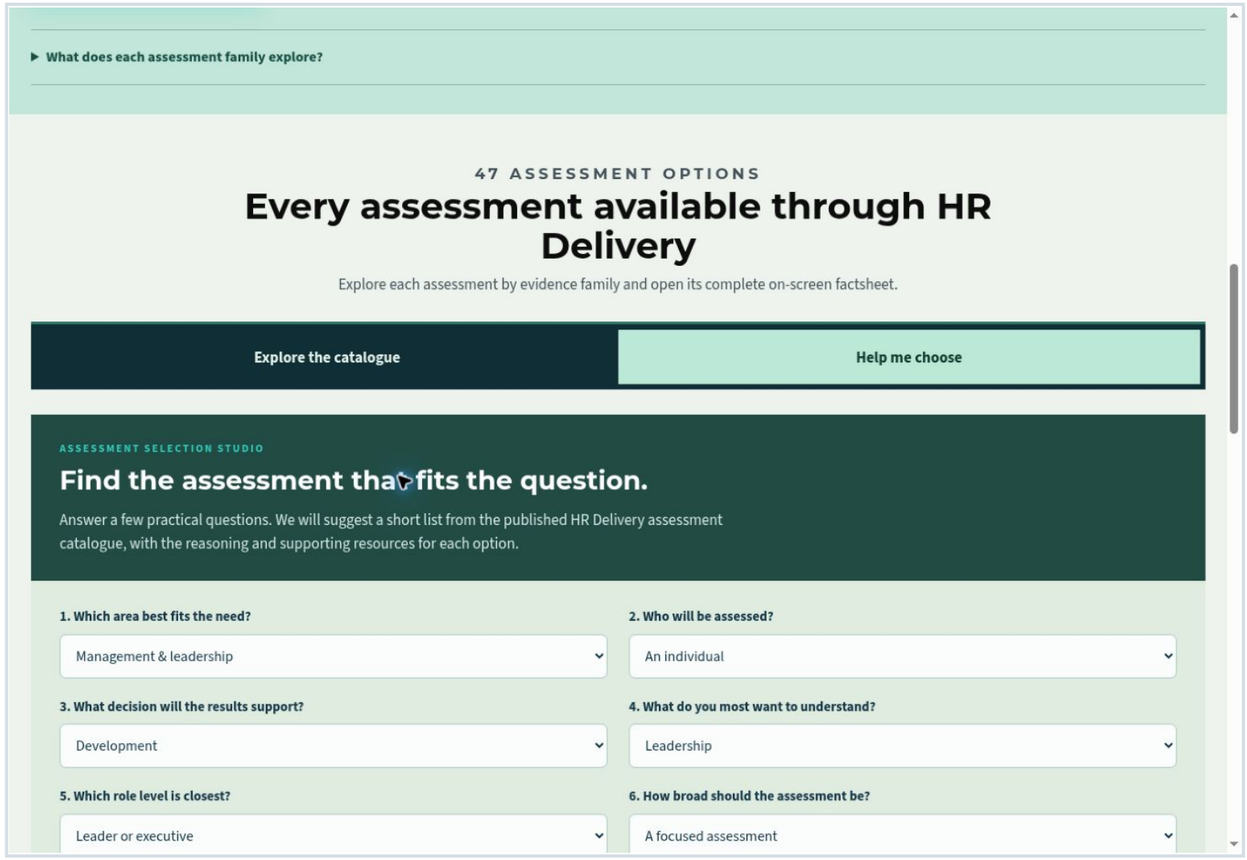
CHECK The intended evidence and participant level are clear.

04 Set breadth and supporting resources

Choose A focused assessment or A broader combined pathway. Select whether factsheets and example reports should be shown.

CHECK The shortlist format matches the review you need.

CURRENT LIVE SCREEN



Current recommendation form with synthetic leadership-development selections.

SELECT THE RIGHT ASSESSMENT / STEPS 5–6 OF 6

OPEN SOURCE

Use the assessment recommendation tool

05 Select 'Show suitable assessments'

Read Recommended assessments and Why this fits. The leadership-development example returned five options; the page calls them starting points for a professional conversation.

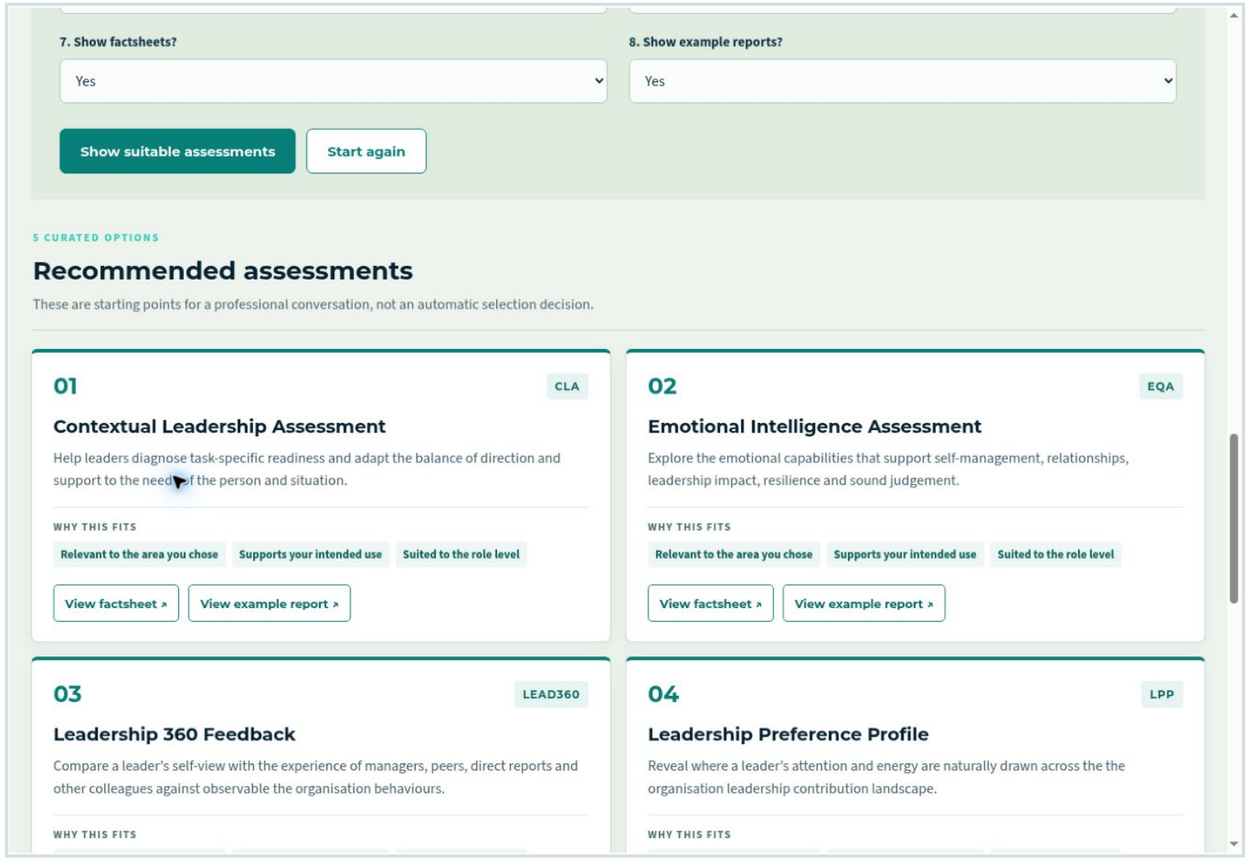
CHECK Recommendations are accompanied by reasons and resource links.

06 Compare the shortlisted options

Open factsheets and reports before deciding. Use 'Start again' when the purpose changes, rather than carrying an earlier shortlist into a new context.

CHECK A practitioner confirms the final assessment choice.

PRIOR REVIEWED SCREEN



Previously reviewed recommendation list showing five curated options and factsheet/report controls.

02 Prepare and allocate

Set up the administration around the people and purpose.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

PREPARE AND ALLOCATE / B-02-01

OPEN SOURCE

Prepare the administration brief

Agree the conditions and responsibilities before registration.

WHO USES THIS Assessment lead

BEFORE YOU BEGIN

- Chosen instrument or pathway
- Client purpose and reporting audience
- Participant communications and feedback plan

WHAT YOU WILL HAVE

- Assessment administration brief
- Participant preparation plan

CHECK BEFORE YOU FINISH

- Purpose and audience are agreed
- Completion and feedback dates are realistic
- The responsible practitioner is identified

The request combines incompatible purposes	Clarify whether a developmental or selection use is intended before choosing conditions and reporting access.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The planning steps are operating guidance. Private administration fields were not inspected.

PREPARE AND ALLOCATE / STEPS 1–2 OF 5

OPEN SOURCE

Prepare the administration brief

01 Define the use and boundaries

State whether the exercise supports development, selection, succession or team effectiveness, and identify who may receive individual and group information.

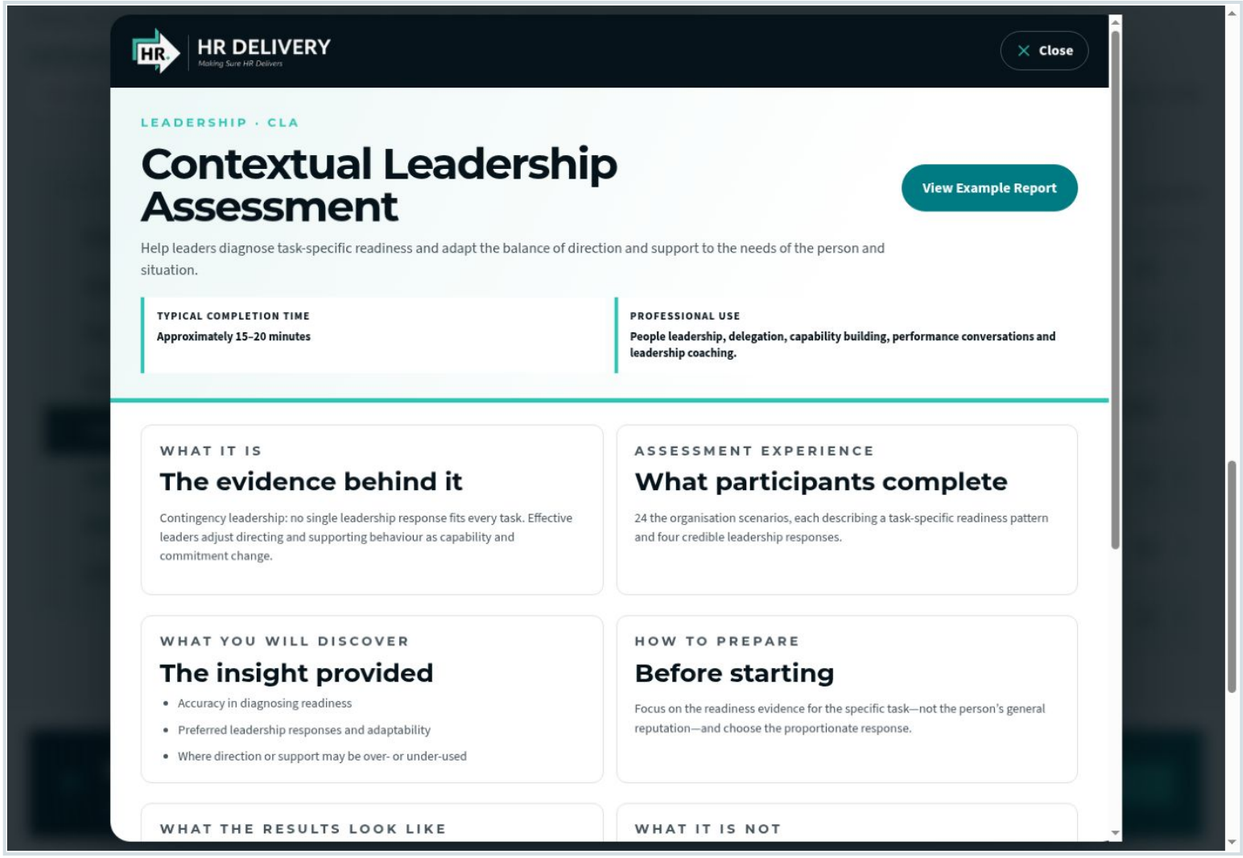
CHECK Everyone understands the purpose and reporting audience.

02 Confirm the population and level

Agree individual or team participation, role levels, technical families and any required preparation. Use the factsheet to check the completion experience.

CHECK The intended participant group matches the selected tools.

PRIOR REVIEWED SCREEN



Previously reviewed Contextual Leadership Assessment factsheet. Check the current edition when opening it.

PREPARE AND ALLOCATE / STEPS 3–4 OF 5

OPEN SOURCE

Prepare the administration brief

03 Prepare the schedule

Allow the stated completion time and plan an appropriate environment. Agree dates for completion, practitioner review and feedback.

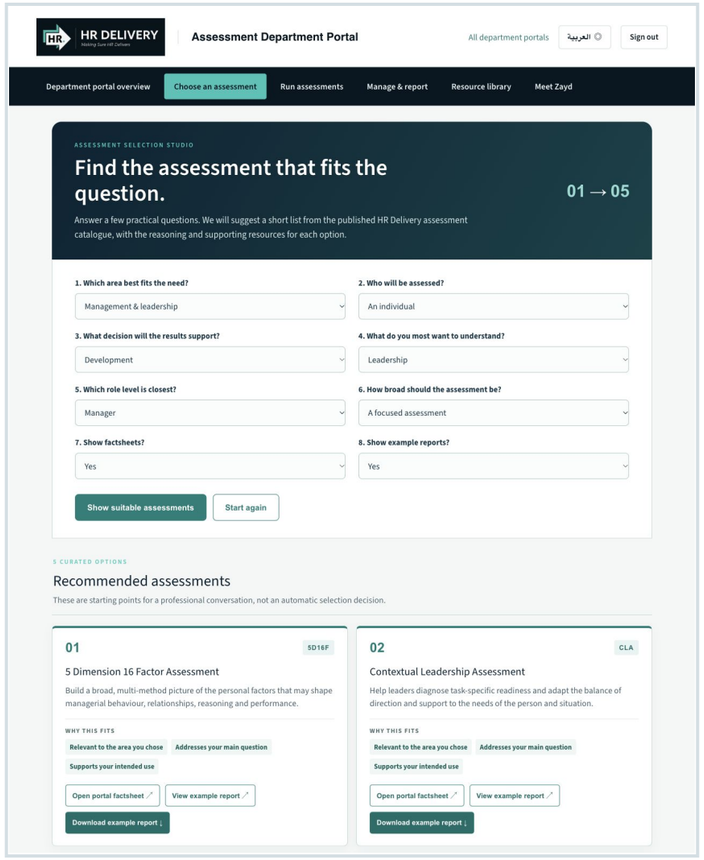
CHECK The timetable includes interpretation and feedback, not only testing.

04 Agree support and adjustments

Give participants a named support route for access or preparation questions. Any adjustments should follow the practitioner's instrument-specific approach.

CHECK Support is available before an issue disrupts administration.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

PREPARE AND ALLOCATE / STEPS 5–5 OF 5

OPEN SOURCE

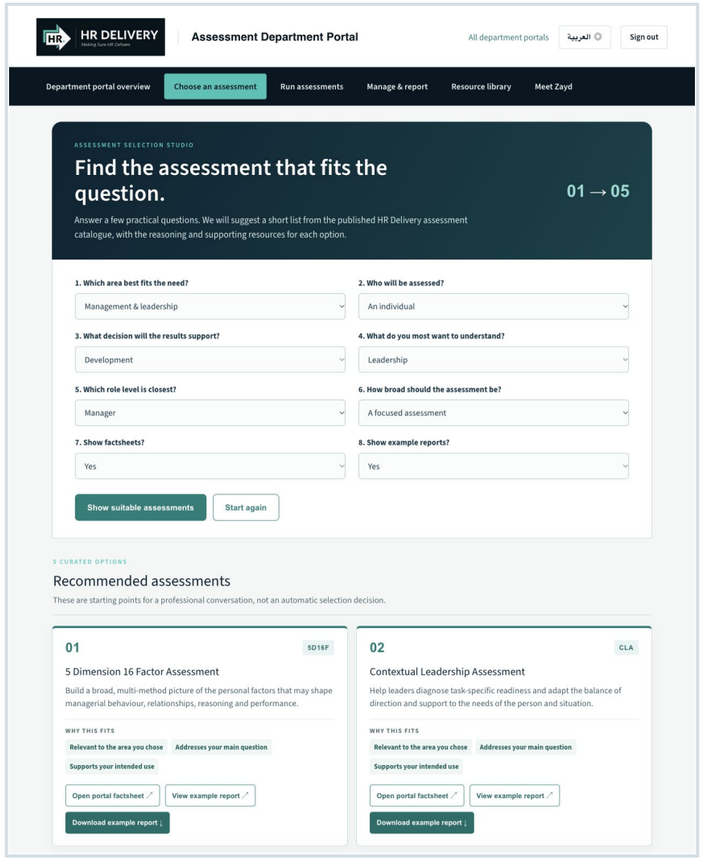
Prepare the administration brief

05 Confirm the record owner

Identify who will register participants, allocate instruments, monitor completion and release results through the configured portal workflow.

CHECK Each administration responsibility has a named owner.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

PREPARE AND ALLOCATE / B-02-02

OPEN SOURCE

Register and maintain participant records

Create a reliable participant list for allocation and reporting.

WHO USES THIS Authorised assessment administrator

BEFORE YOU BEGIN

- Approved participant list
- Correct organisation/workspace
- Required participant information and purpose

WHAT YOU WILL HAVE

- Accurate participant register

CHECK BEFORE YOU FINISH

- Unique identity is checked
- Organisation/team context is correct
- Only necessary information is entered

A participant has duplicate records	Ask the administrator for the supported reconciliation process before allocating more assessments or deleting anything.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Participant fields, duplicate handling and saving remain unverified behind sign-in.

PREPARE AND ALLOCATE / STEPS 1–2 OF 5

OPEN SOURCE

Register and maintain participant records

01 Open 'Run assessments'

Use the portal area shown in HR Delivery's demonstration for administration. Confirm the participant-registration control with your workspace administrator.

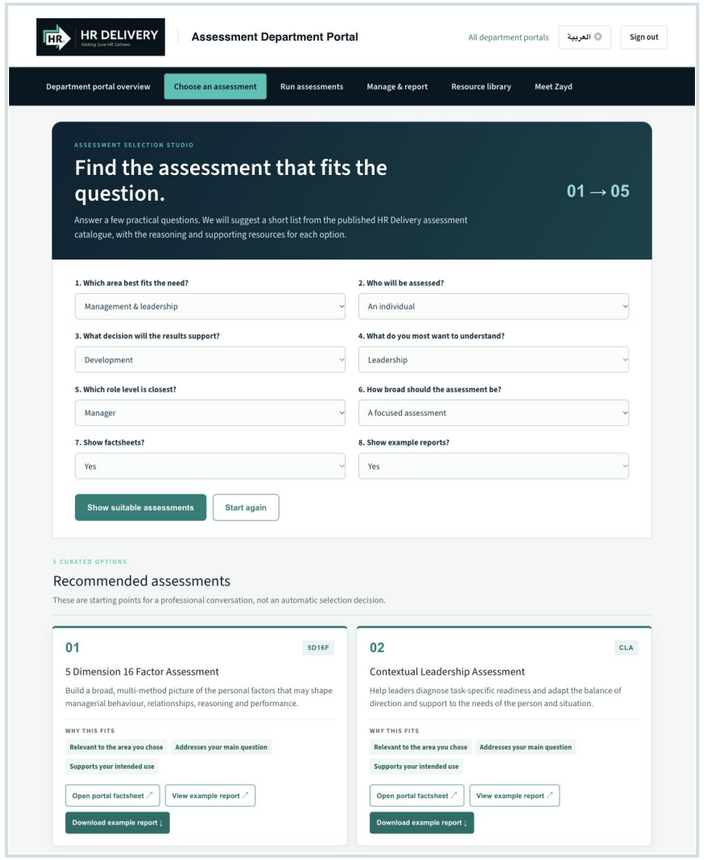
CHECK The administrator is in the appropriate authorised workflow.

02 Check for an existing participant

Use the actual participant identifier and available record search before creating another record. Avoid duplicate allocations under similar names.

CHECK Each person can be identified consistently.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

PREPARE AND ALLOCATE / STEPS 3–4 OF 5

OPEN SOURCE

Register and maintain participant records

03 Enter the required registration information

Use only the fields needed by the portal and the assessment purpose. Check spelling, contact route and organisation/team context before saving.

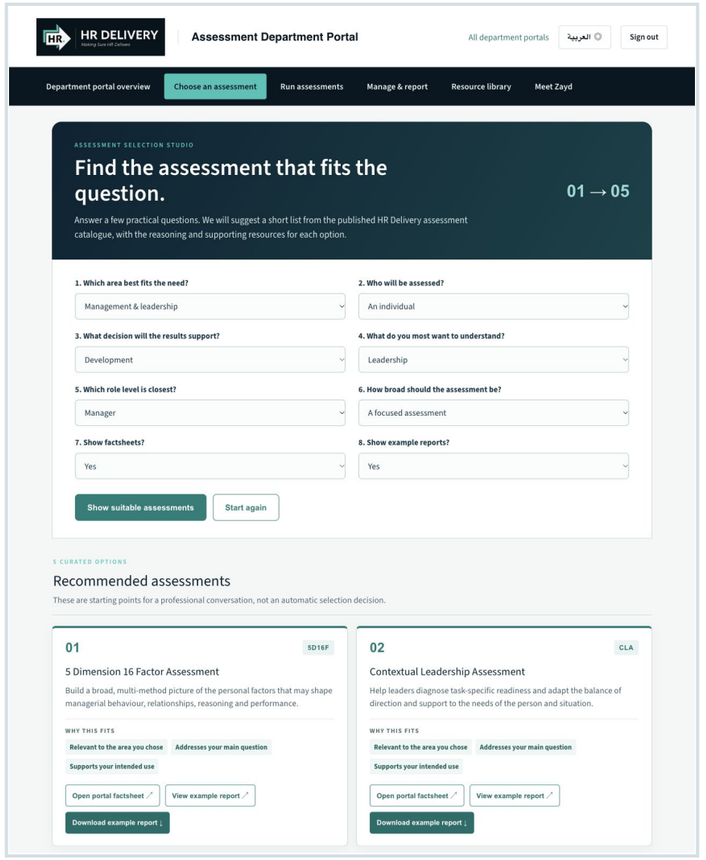
CHECK The record can be matched to the correct participant.

04 Review the participant list

Reconcile the saved list with the approved administration brief. Resolve missing people, duplicates and incorrect group membership before allocation.

CHECK The intended population is represented accurately.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

PREPARE AND ALLOCATE / STEPS 5–5 OF 5

OPEN SOURCE

Register and maintain participant records

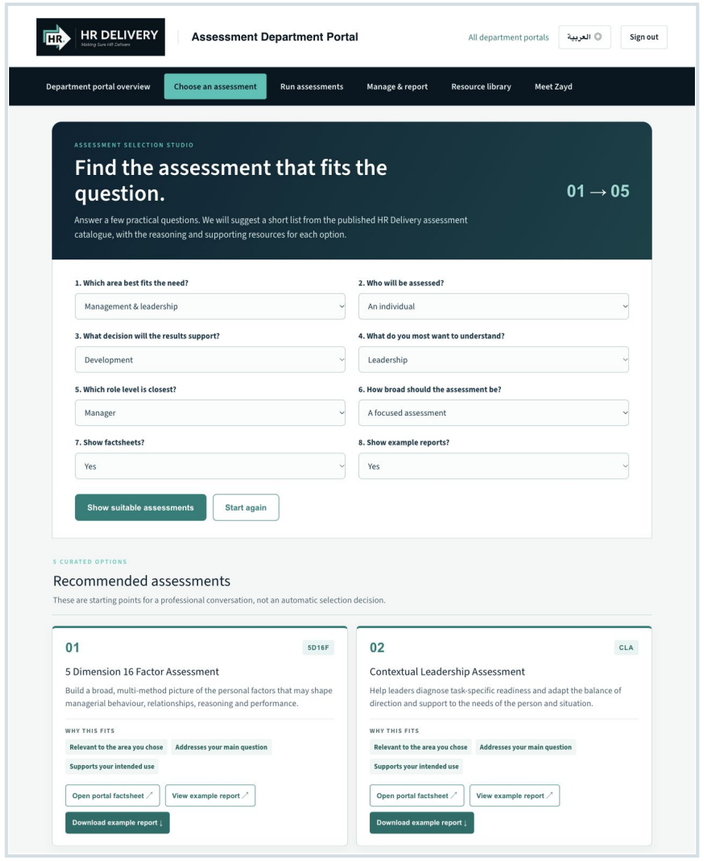
05

Keep a correction trail

Use the supported record-maintenance process for changes. Confirm the impact on existing allocations and reports with the administrator when necessary.

CHECK Corrections do not create conflicting participant identities.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

PREPARE AND ALLOCATE / B-02-03

OPEN SOURCE

Allocate an instrument or combined pathway

Connect the correct participant with the authorised assessment.

WHO USES THIS Authorised assessment administrator

BEFORE YOU BEGIN

- Registered participants
- Approved tool, level and purpose
- Agreed completion window

WHAT YOU WILL HAVE

- Assessment allocations
- Participant completion instructions

CHECK BEFORE YOU FINISH

- Participant and assessment match
- Pathway breadth is intentional
- Completion details are accurate

The wrong tool was allocated	Do not reinterpret the resulting data as the intended measure. Contact the authorised administrator to correct the allocation through the supported workflow.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Allocation, completion-link creation and external dispatch were not tested.

PREPARE AND ALLOCATE / STEPS 1–2 OF 5

OPEN SOURCE

Allocate an instrument or combined pathway

01 Use 'Run assessments'

Select the intended participant or group in the configured allocation workflow. Check the organisation context before making the allocation.

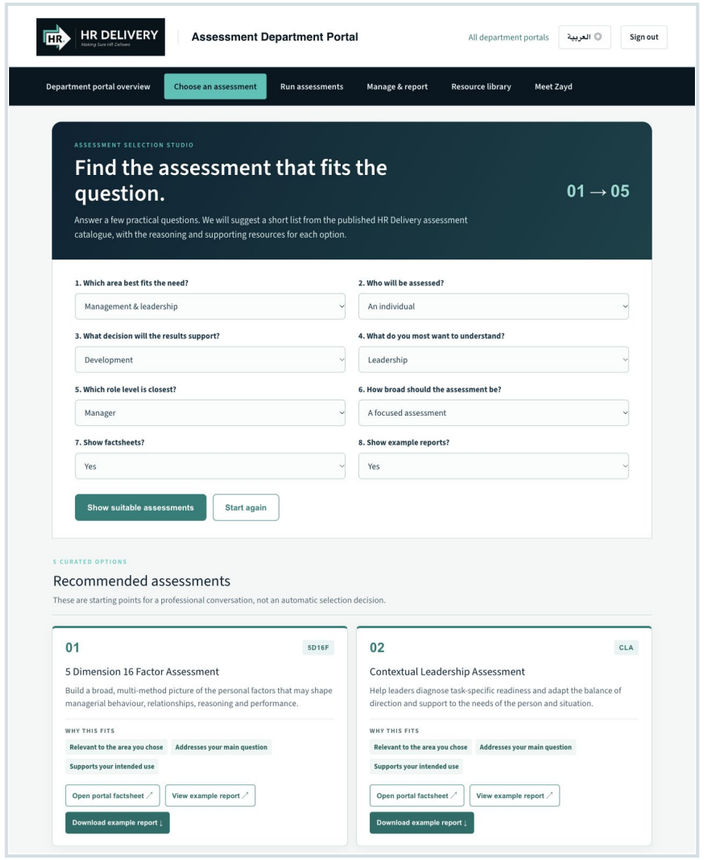
CHECK The intended people and workspace are selected.

02 Choose the approved assessment

Match the instrument name or pathway to the administration brief. For competency assessments, confirm the role level and technical family where applicable.

CHECK The allocated content matches the approved evidence question.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

PREPARE AND ALLOCATE / STEPS 3–4 OF 5

OPEN SOURCE

Allocate an instrument or combined pathway

03 Check pathway components

For a combined pathway, review the component instruments and participant burden before release. Do not allocate overlapping content without a clear reason.

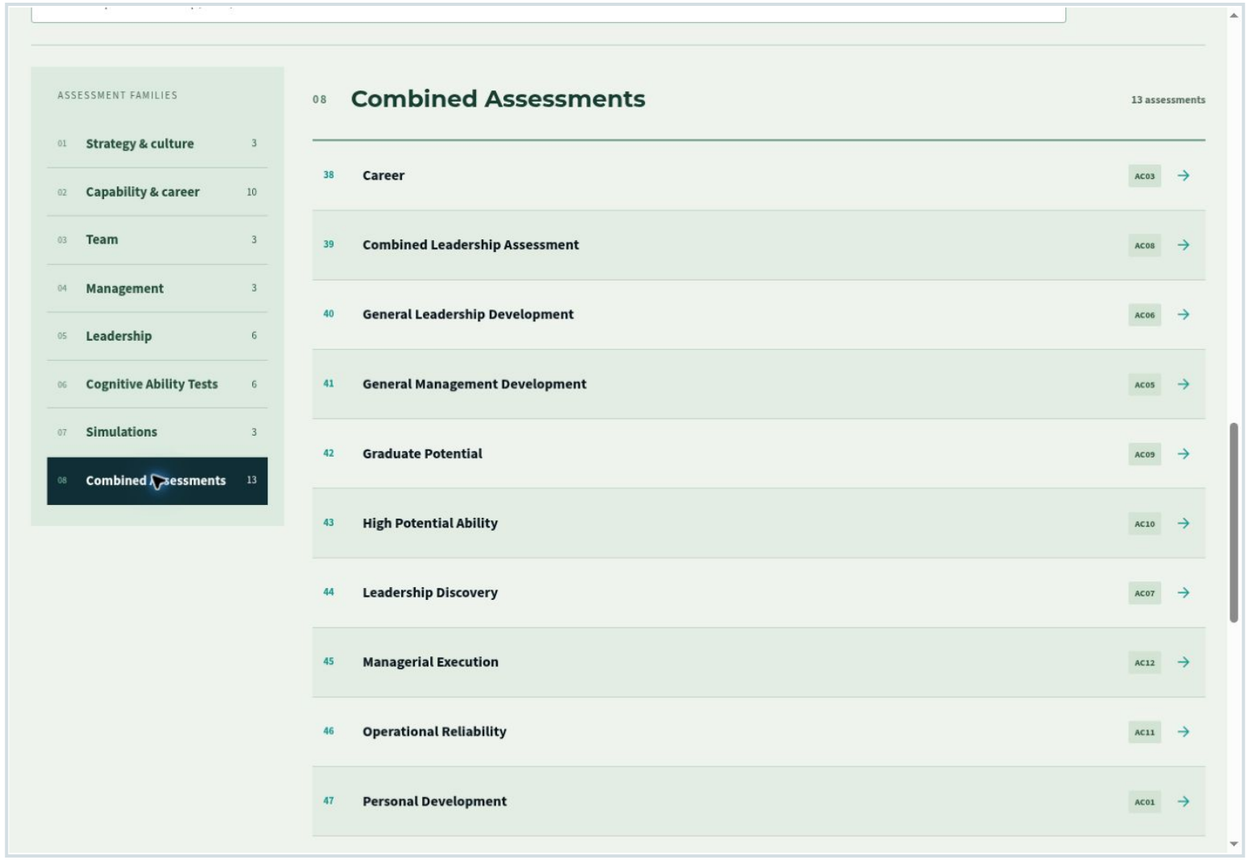
CHECK The combined assessment has a coherent purpose and workload.

04 Prepare the participant instructions

Use the supported completion route and give the correct preparation, deadline and support details. Private link and dispatch controls require local confirmation.

CHECK Participants can identify what to complete and where to get help.

PRIOR REVIEWED SCREEN



Public combined-pathway catalogue used to review the intended route.

PREPARE AND ALLOCATE / STEPS 5–5 OF 5

OPEN SOURCE

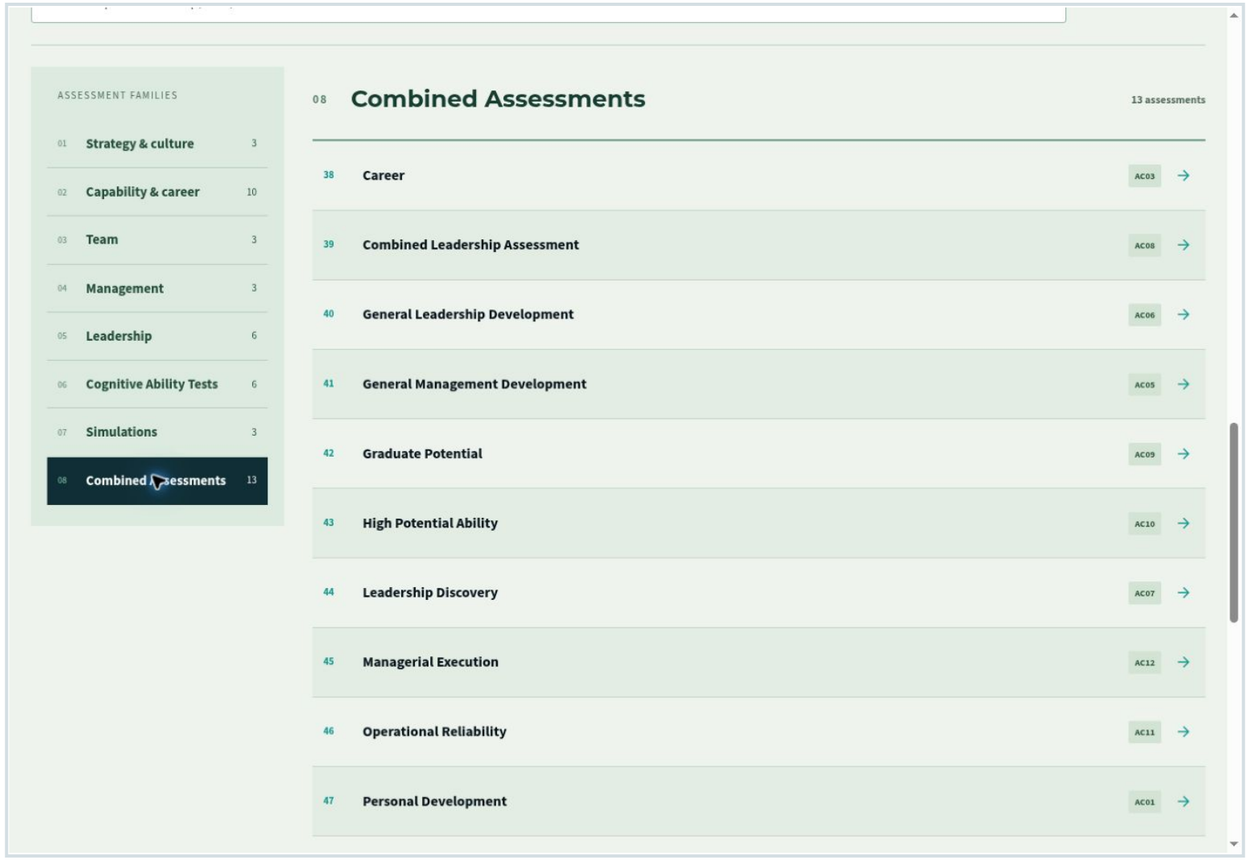
Allocate an instrument or combined pathway

05 Reconcile the allocation list

Check each participant against the intended instrument, pathway and deadline. Retain the actual allocation state shown by the portal.

CHECK The administrator can identify missing or incorrect allocations.

PRIOR REVIEWED SCREEN



Public combined-pathway catalogue used to review the intended route.

03 Completion and monitoring

Help participants complete the correct work and keep progress accurate.

02 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

COMPLETION AND MONITORING / B-03-01

OPEN SOURCE

Prepare a participant to begin

Make the participant experience understandable before the first response.

WHO USES THIS Participant with administrator support

BEFORE YOU BEGIN

- Authorised completion route
- Relevant factsheet preparation
- Uninterrupted time appropriate to the instrument

WHAT YOU WILL HAVE

- Completed participant assessment, when confirmed

CHECK BEFORE YOU FINISH

- Correct assessment and identity
- Appropriate conditions and preparation
- Completion status is explicitly checked

The session is interrupted	Record the reference and last screen. Ask the administrator whether the session can resume; do not assume a restart is required.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Factsheet preparation is observed. Participant completion screens, timing and submission behaviour were not exercised.

COMPLETION AND MONITORING / STEPS 1–2 OF 5

OPEN SOURCE

Prepare a participant to begin

01 Check the assessment identity

Open the supplied completion route and confirm the intended assessment, purpose and participant identity. Ask for correction if any of these are wrong.

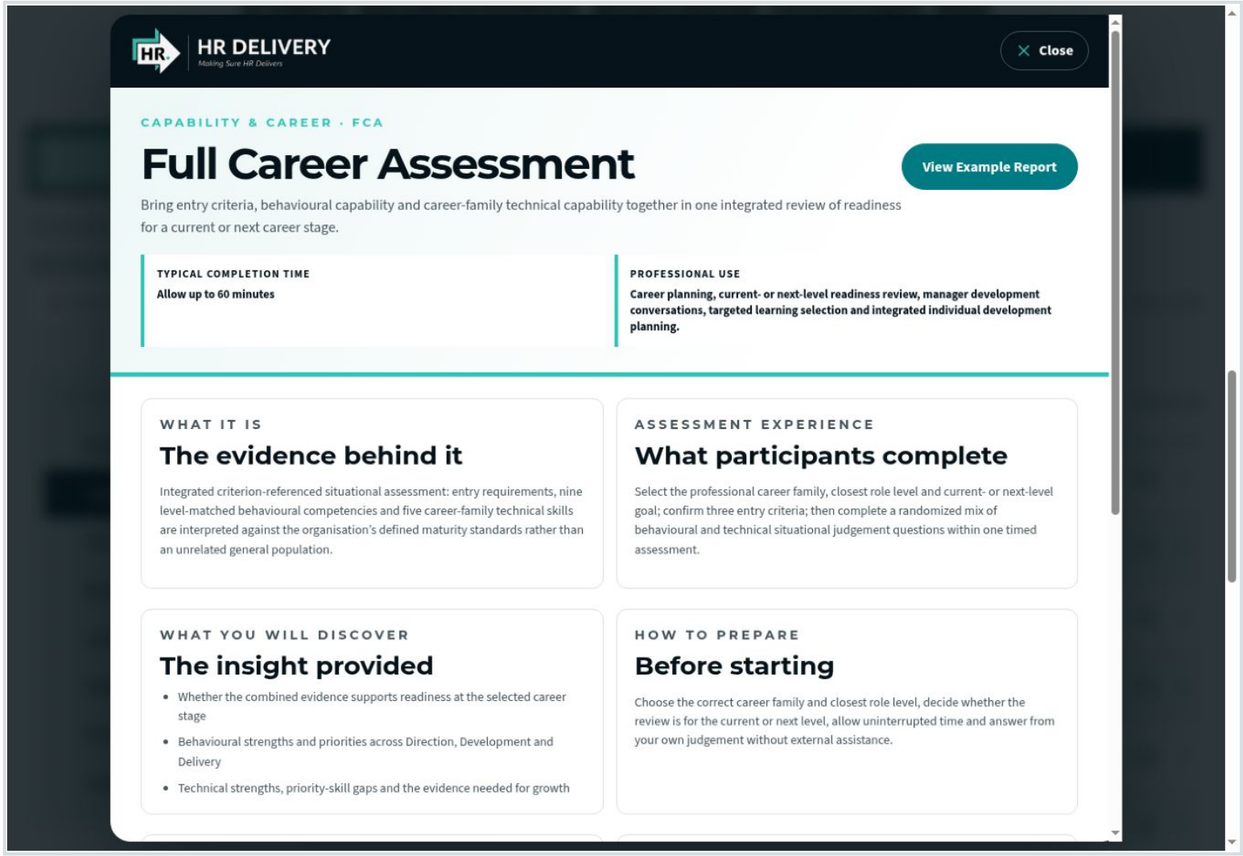
CHECK The participant is about to take the correct assessment.

02 Read the specific instructions

Review timing, response format and any preparation. A preference questionnaire, a timed reasoning test and a simulation may require different approaches.

CHECK The participant understands the task and conditions.

PRIOR REVIEWED SCREEN



Public factsheet explaining the career assessment experience and preparation.

COMPLETION AND MONITORING / STEPS 3–4 OF 5

OPEN SOURCE

Prepare a participant to begin

03 Confirm role or career context when required

For career and competency tools, confirm the intended family, maturity level and current- or next-level aim with the administrator before proceeding.

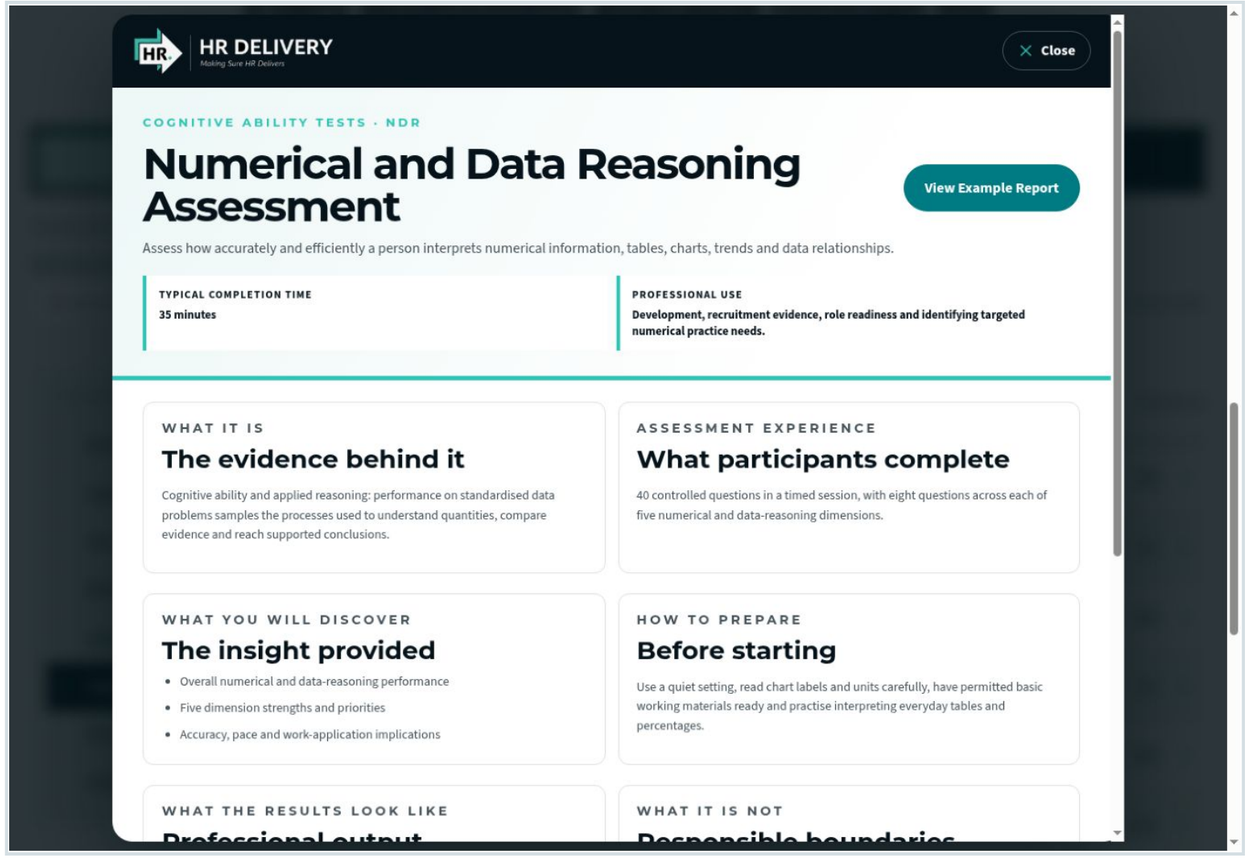
CHECK The chosen context matches the approved allocation.

04 Complete using your own responses

Work according to the instrument's instructions and avoid outside assistance where individual judgement or ability is being assessed.

CHECK The responses represent the participant under the intended conditions.

PRIOR REVIEWED SCREEN



Public Numerical and Data Reasoning factsheet; timed reasoning has instrument-specific instructions.

COMPLETION AND MONITORING / STEPS 5–5 OF 5

OPEN SOURCE

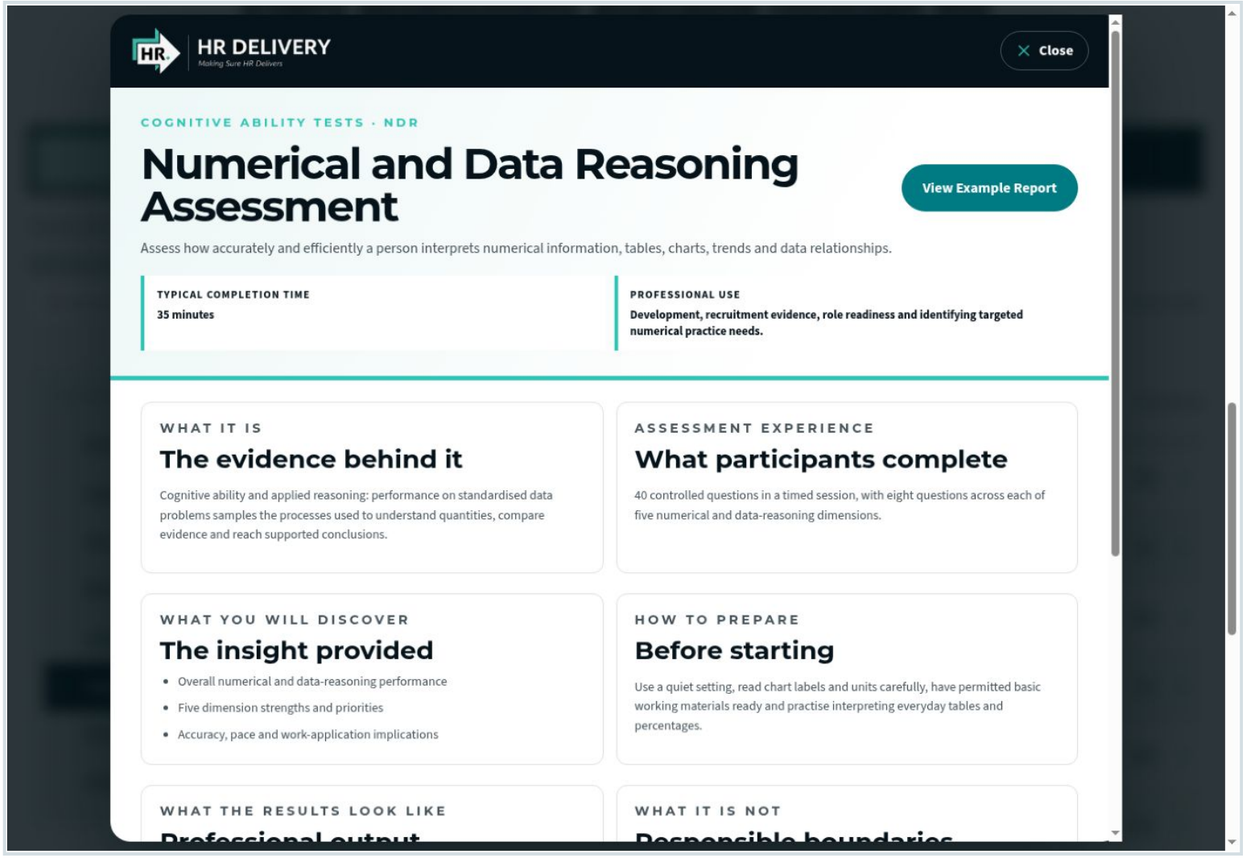
Prepare a participant to begin

05 Retain the completion confirmation

Use the actual on-screen status after completion. If interrupted, contact support with the assessment reference before restarting or submitting again.

CHECK Completion is confirmed by the service rather than assumed.

PRIOR REVIEWED SCREEN



Public Numerical and Data Reasoning factsheet; timed reasoning has instrument-specific instructions.

COMPLETION AND MONITORING / B-03-02

OPEN SOURCE

Monitor completion and resolve exceptions

Know who still needs support before reporting.

WHO USES THIS Assessment administrator

BEFORE YOU BEGIN

- Allocation list
- Agreed completion date
- Support and escalation route

WHAT YOU WILL HAVE

- Completion reconciliation
- Exception and support actions

CHECK BEFORE YOU FINISH

- Scope matches the allocation list
- Incomplete evidence is not treated as a complete result
- No duplicate assessment is created unnecessarily

A participant reports completion but the record differs	Check the participant reference, instrument and time; escalate the discrepancy before asking the person to retake it.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Protected completion states and reminder controls were not inspected.

COMPLETION AND MONITORING / STEPS 1–2 OF 5

OPEN SOURCE

Monitor completion and resolve exceptions

01 Open 'Manage & report'

Use the portal area shown in the official demonstration and locate the relevant assessment activity. Confirm the actual completion-monitoring controls locally.

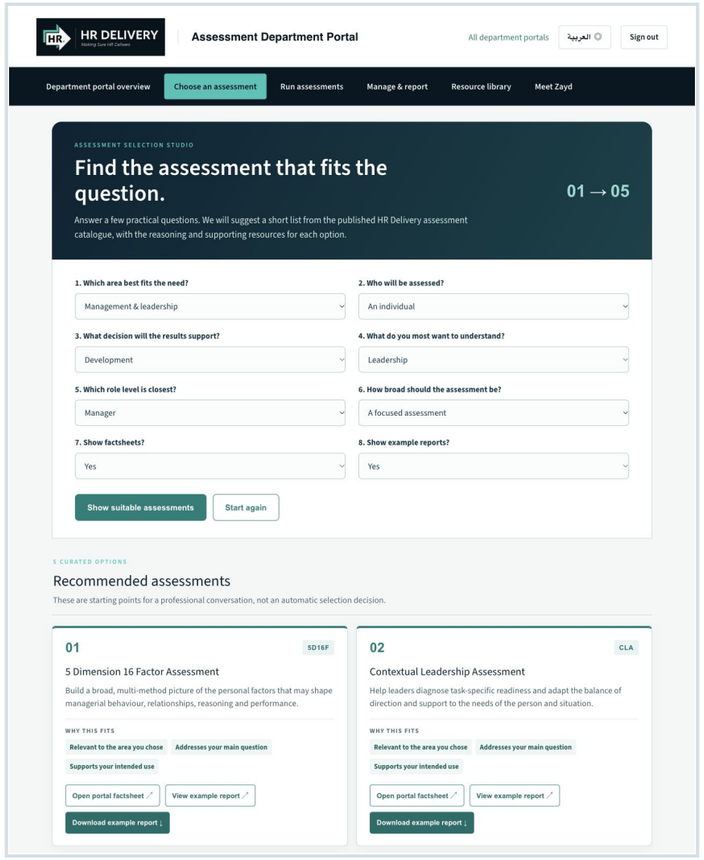
CHECK The monitoring view covers the intended administration.

02 Reconcile assigned and completed work

Compare participant allocations with the service’s current completion states. Distinguish not started, in progress and completed only where those states are actually supported.

CHECK The administrator knows which records need attention.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

COMPLETION AND MONITORING / STEPS 3–4 OF 5

OPEN SOURCE

Monitor completion and resolve exceptions

03 Investigate individual exceptions

Check identity, allocation and the participant's reported issue before changing a record. Request the exact error and time rather than a password.

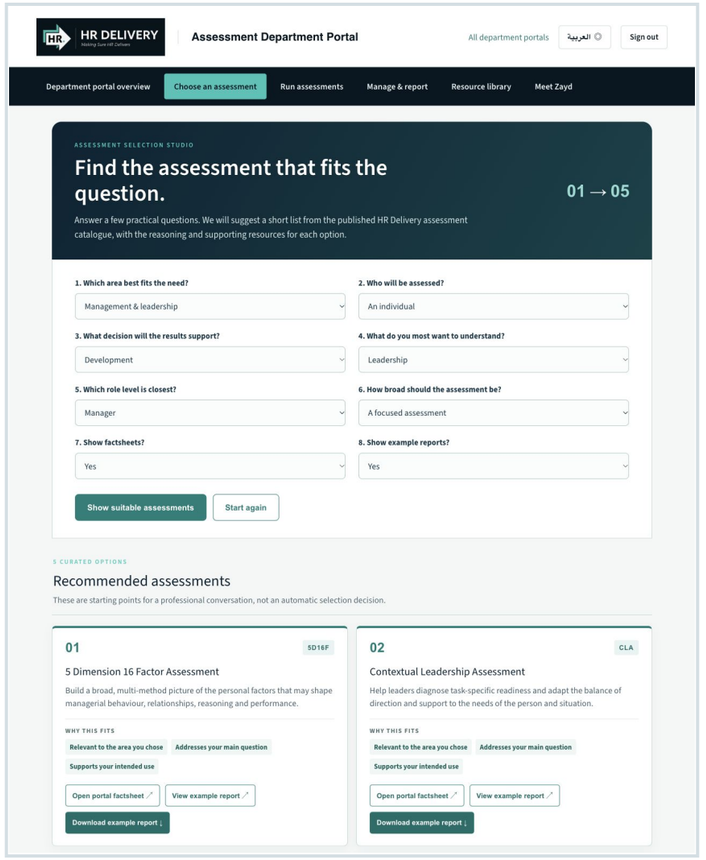
CHECK Support is focused on a specific problem.

04 Review any follow-up communication

Use approved contact channels and the stated completion window. Confirm provider delivery where a system notification is used.

CHECK Participants receive appropriate support without duplicate notices.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

COMPLETION AND MONITORING / STEPS 5–5 OF 5

OPEN SOURCE

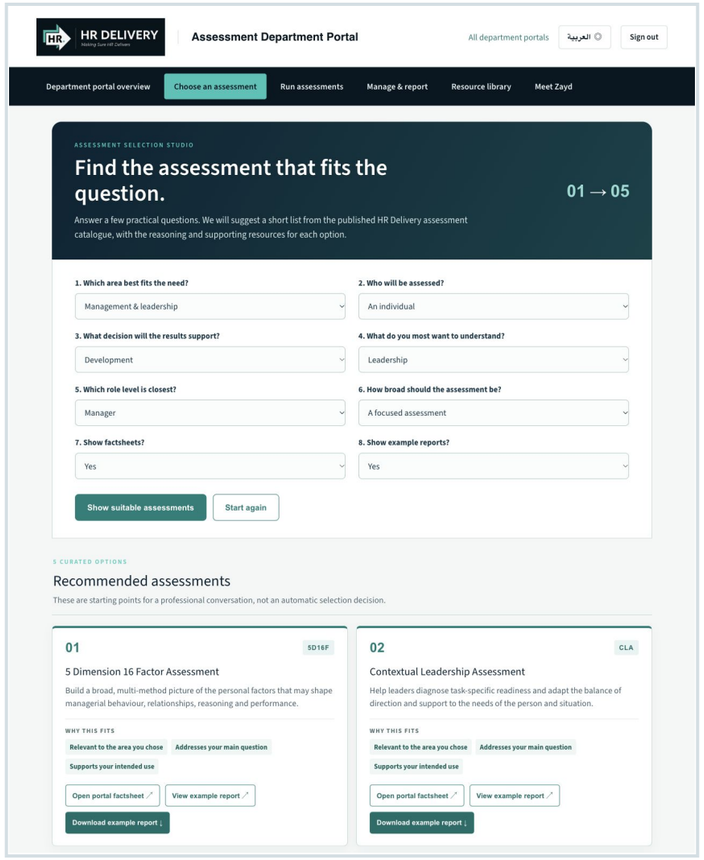
Monitor completion and resolve exceptions

05 Close the administration check

Confirm which participants are ready for interpretation and identify missing or incomplete evidence that affects any combined or group report.

CHECK Reporting starts from a reconciled completion list.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

04 Read, combine and discuss results

Interpret the evidence within the assessment purpose.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

READ, COMBINE AND DISCUSS RESULTS / B-04-01

OPEN SOURCE

Review an individual report

Turn an individual profile into a structured professional conversation.

WHO USES THIS Authorised practitioner

BEFORE YOU BEGIN

- Confirmed completion
- Correct participant and assessment
- Relevant interpretation guidance

WHAT YOU WILL HAVE

- Interpreted individual profile
- Feedback and development priorities

CHECK BEFORE YOU FINISH

- Identity and version are correct
- Interpretation stays within the instrument's boundaries
- Actions are specific and reviewable

Narrative and other evidence seem inconsistent	Treat the difference as a question for discussion. Check administration context and gather further evidence rather than forcing agreement.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public report examples were inspected. Private result retrieval and report release were not tested.

READ, COMBINE AND DISCUSS RESULTS / STEPS 1–2 OF 5

OPEN SOURCE

Review an individual report

01 Use 'Manage & report'

Open the authorised result for the intended participant. Verify the instrument, date, purpose and role context before interpreting the content.

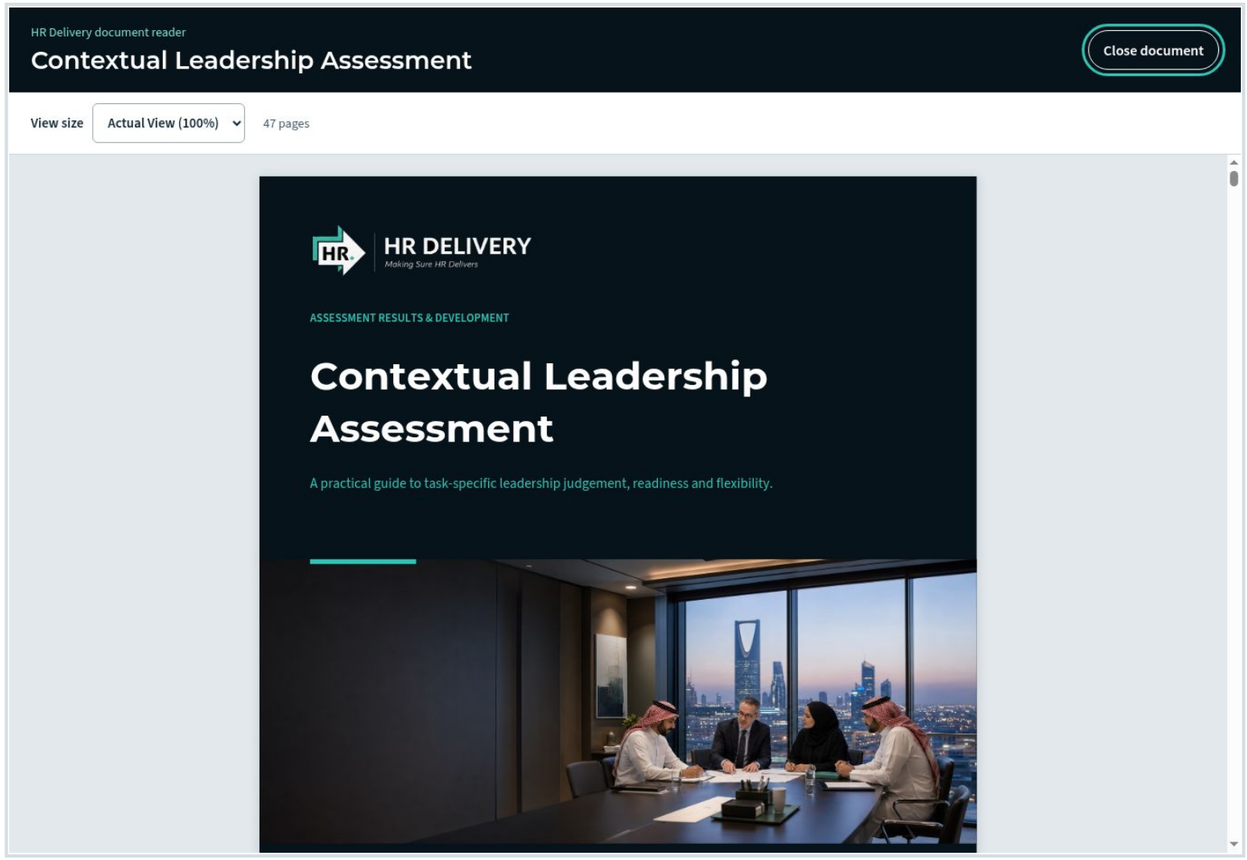
CHECK The report belongs to the correct person and administration.

02 Read the report framework

Understand the scales, reference basis and narrative structure before focusing on high or low values. Use the practitioner resource for the particular instrument.

CHECK Interpretation uses the correct meaning of the result.

PRIOR REVIEWED SCREEN



Previously reviewed Contextual Leadership example-report reader; use the current report edition in your browser.

READ, COMBINE AND DISCUSS RESULTS / STEPS 3–4 OF 5

OPEN SOURCE

Review an individual report

03 Identify a small set of themes

Note strengths, development priorities and questions that deserve further evidence. Do not label a person from a single score or descriptive phrase.

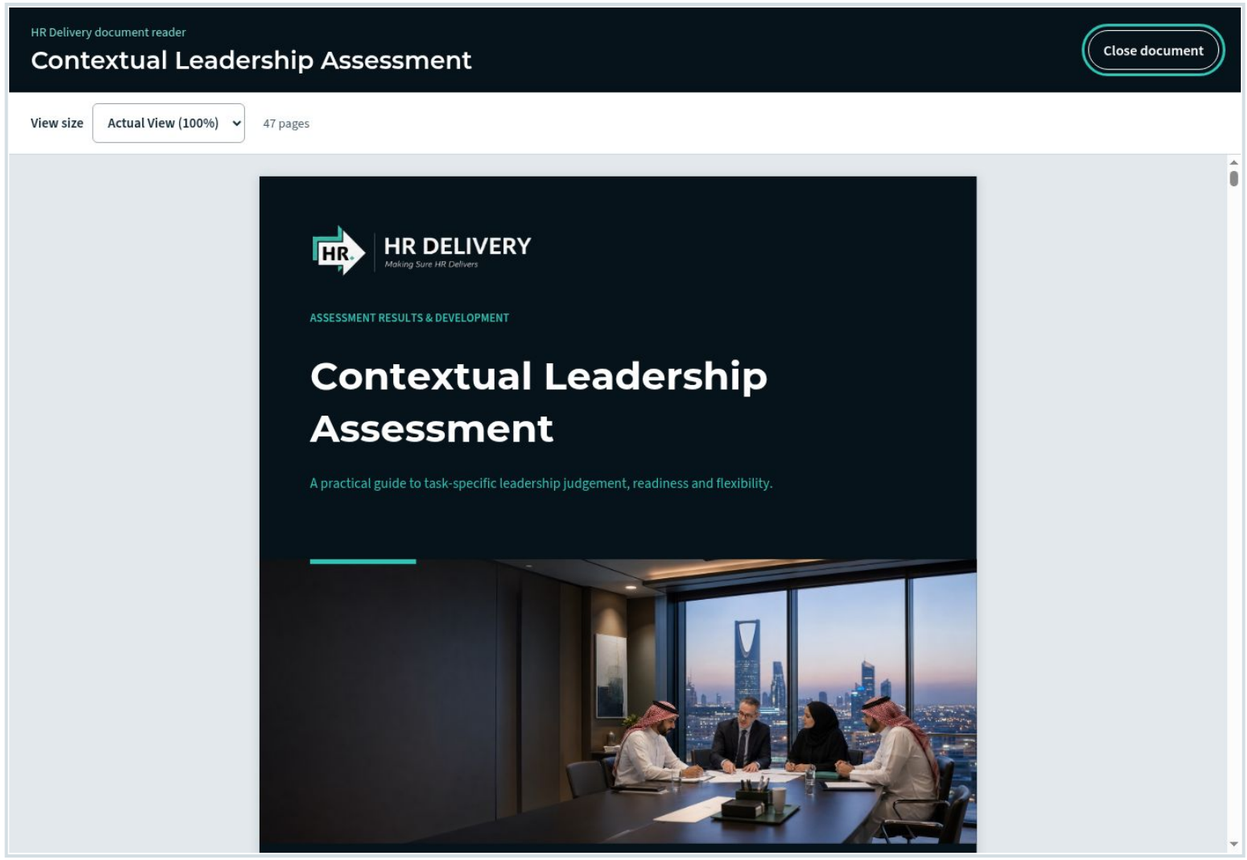
CHECK The practitioner has balanced themes for feedback.

04 Relate findings to the work

Discuss concrete situations where the pattern may help or hinder the intended contribution. Compare with interview, experience or observed work evidence when appropriate.

CHECK The profile is connected to the real role or development goal.

PRIOR REVIEWED SCREEN



Prior reviewed public Contextual Leadership example-report reader.

READ, COMBINE AND DISCUSS RESULTS / STEPS 5–5 OF 5

OPEN SOURCE

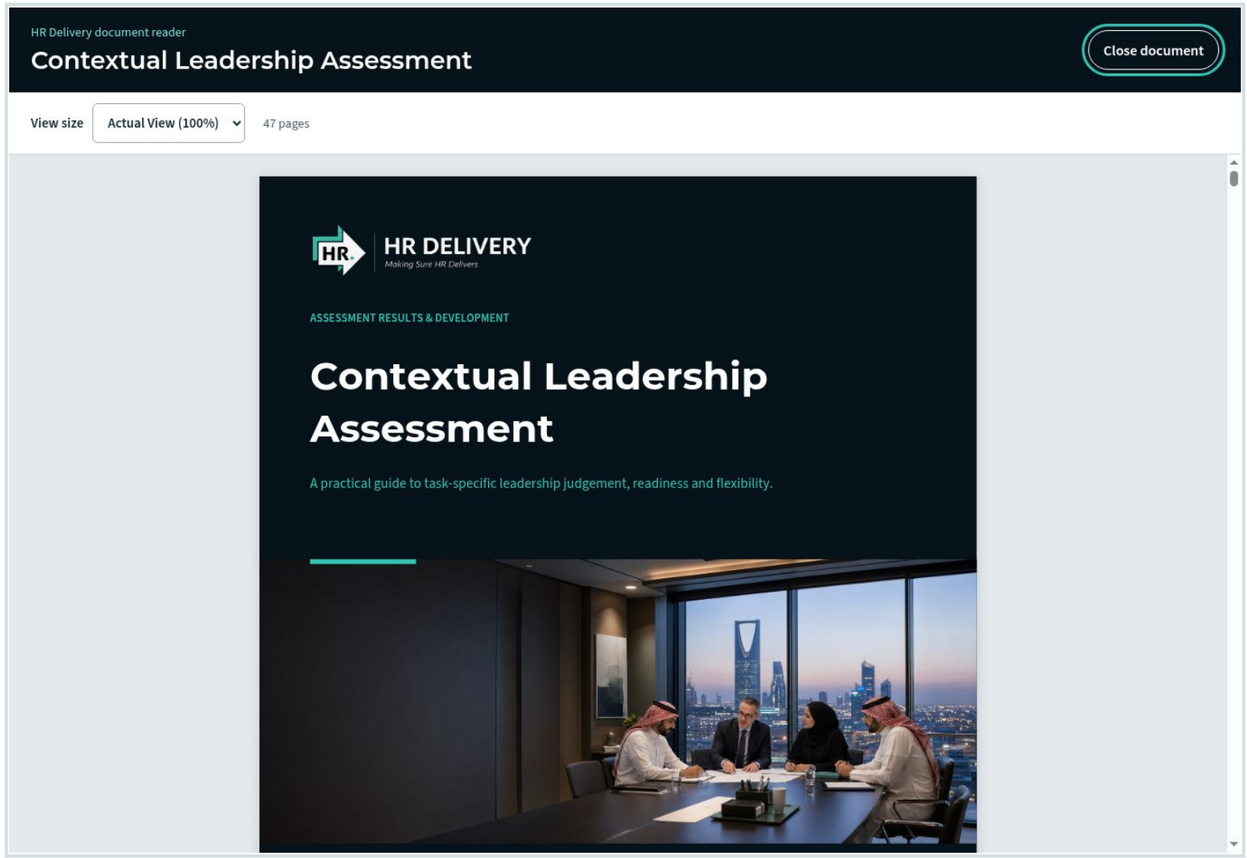
Review an individual report

05 Agree and record a next step

Identify a practical action, evidence of progress and a review date. Release reports only through the organisation’s authorised process.

CHECK Feedback produces an understandable action plan.

PRIOR REVIEWED SCREEN



Prior reviewed public Contextual Leadership example-report reader.

READ, COMBINE AND DISCUSS RESULTS / B-04-02

OPEN SOURCE

Review a combined pathway report

Integrate several evidence sources without treating them as interchangeable.

WHO USES THIS Assessment practitioner

BEFORE YOU BEGIN

- Correct combined pathway
- Component completion list
- Purpose and report audience

WHAT YOU WILL HAVE

- Integrated pathway interpretation
- Prioritised development or enquiry actions

CHECK BEFORE YOU FINISH

- Required components are complete
- Measure types remain distinct
- Conclusions are supported by the evidence

One component is missing	Ask the practitioner to determine whether reporting should wait or the report must explicitly identify the missing evidence.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The public pathway catalogue is evidenced; private report assembly was not exercised.

READ, COMBINE AND DISCUSS RESULTS / STEPS 1–2 OF 5

OPEN SOURCE

Review a combined pathway report

01 Confirm the pathway

Check the pathway name and its intended purpose against the administration brief. Personal Discovery, Career and Strategic Leadership Ability answer different questions.

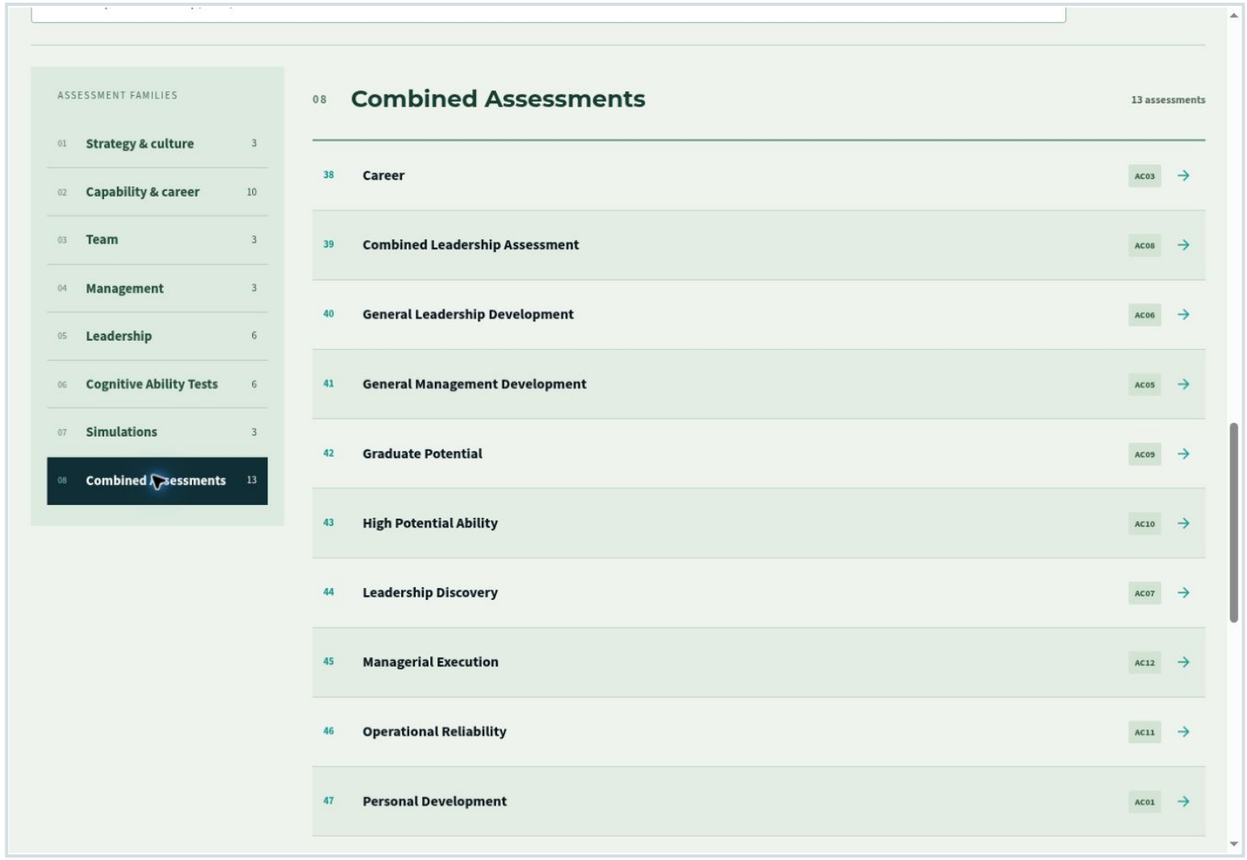
CHECK The integration serves the agreed purpose.

02 Check component completeness

Review which instruments contribute to the pathway and whether the required evidence is complete. Identify any missing or unsuitable component before interpretation.

CHECK The practitioner understands the evidence coverage.

PRIOR REVIEWED SCREEN



Public catalogue of thirteen combined pathways.

READ, COMBINE AND DISCUSS RESULTS / STEPS 3–4 OF 5

OPEN SOURCE

Review a combined pathway report

03 Read each component on its own terms

Keep preference, judgement, competency and ability evidence distinct. Use the relevant guidance before drawing a combined conclusion.

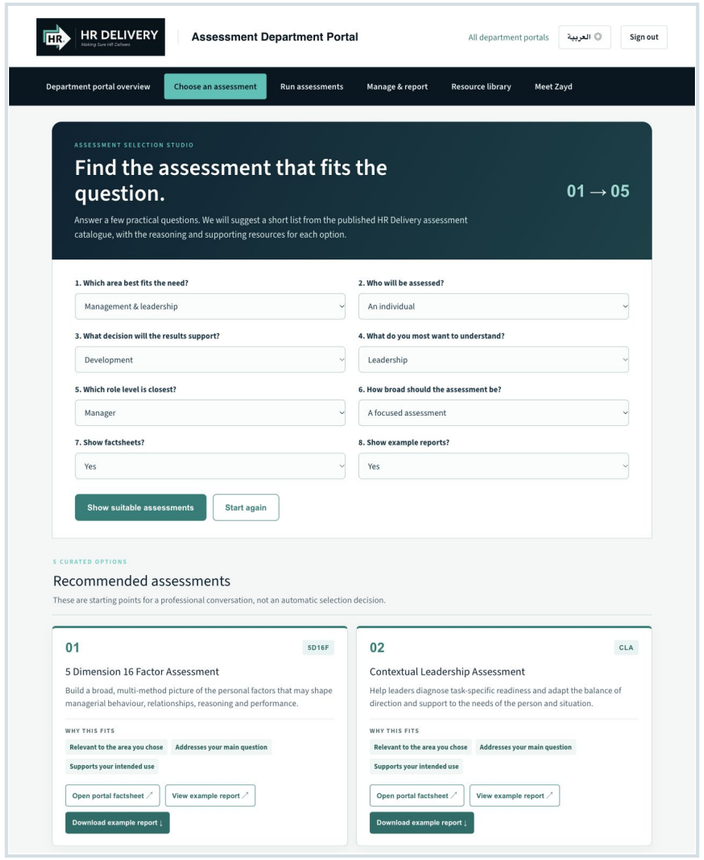
CHECK Different measures are not mistaken for the same construct.

04 Look for convergence and useful differences

Identify where the evidence supports a shared theme and where it raises an additional question. Record the reasoning, not just a combined label.

CHECK The integrated interpretation is explainable.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

READ, COMBINE AND DISCUSS RESULTS / STEPS 5–5 OF 5

OPEN SOURCE

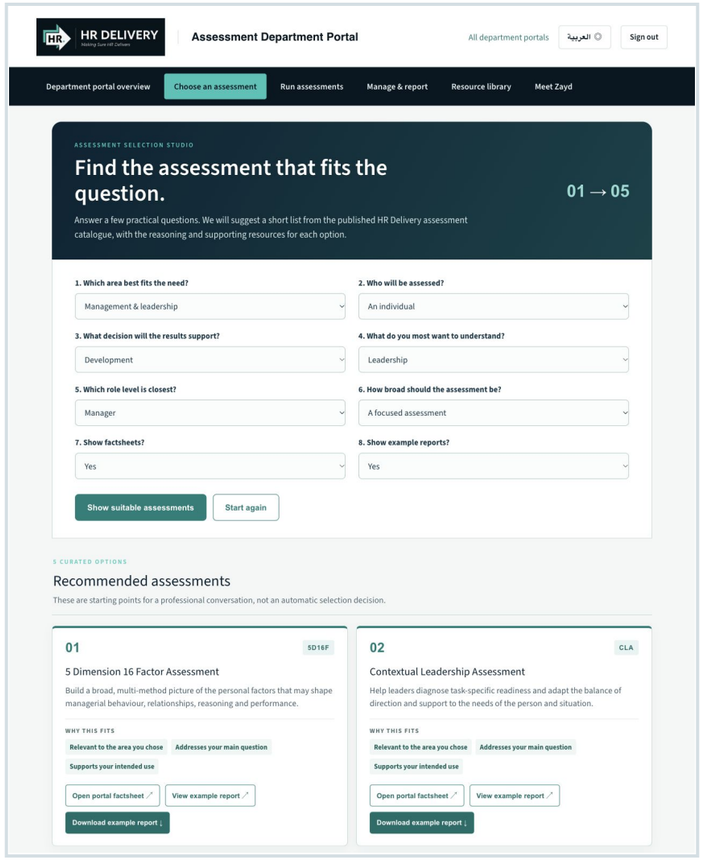
Review a combined pathway report

05 Agree priorities and feedback

Select a manageable set of actions and discuss the pathway's limits with the participant or authorised client audience.

CHECK The report leads to clear, proportionate next steps.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

READ, COMBINE AND DISCUSS RESULTS / B-04-03

OPEN SOURCE

Use team and organisation reporting

Read aggregated evidence with a clear scope and appropriate confidentiality.

WHO USES THIS Authorised HR analyst or practitioner

BEFORE YOU BEGIN

- Agreed group/reporting purpose
- Relevant participant group
- Appropriate reporting permissions

WHAT YOU WILL HAVE

- Scoped team or organisation report
- Action priorities

CHECK BEFORE YOU FINISH

- Group and period are correct
- Missing data is explained
- Audience and confidentiality are appropriate

Groups appear difficult to compare Check instrument, purpose, level and completion coverage before comparing scores or profiles.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private analytics filters, metric definitions and exports were not inspected.

READ, COMBINE AND DISCUSS RESULTS / STEPS 1–2 OF 5

OPEN SOURCE

Use team and organisation reporting

01 Define the report population

State the organisation, team, cohort and administration period. Identify whether the question is team collaboration, capability, completion or another defined outcome.

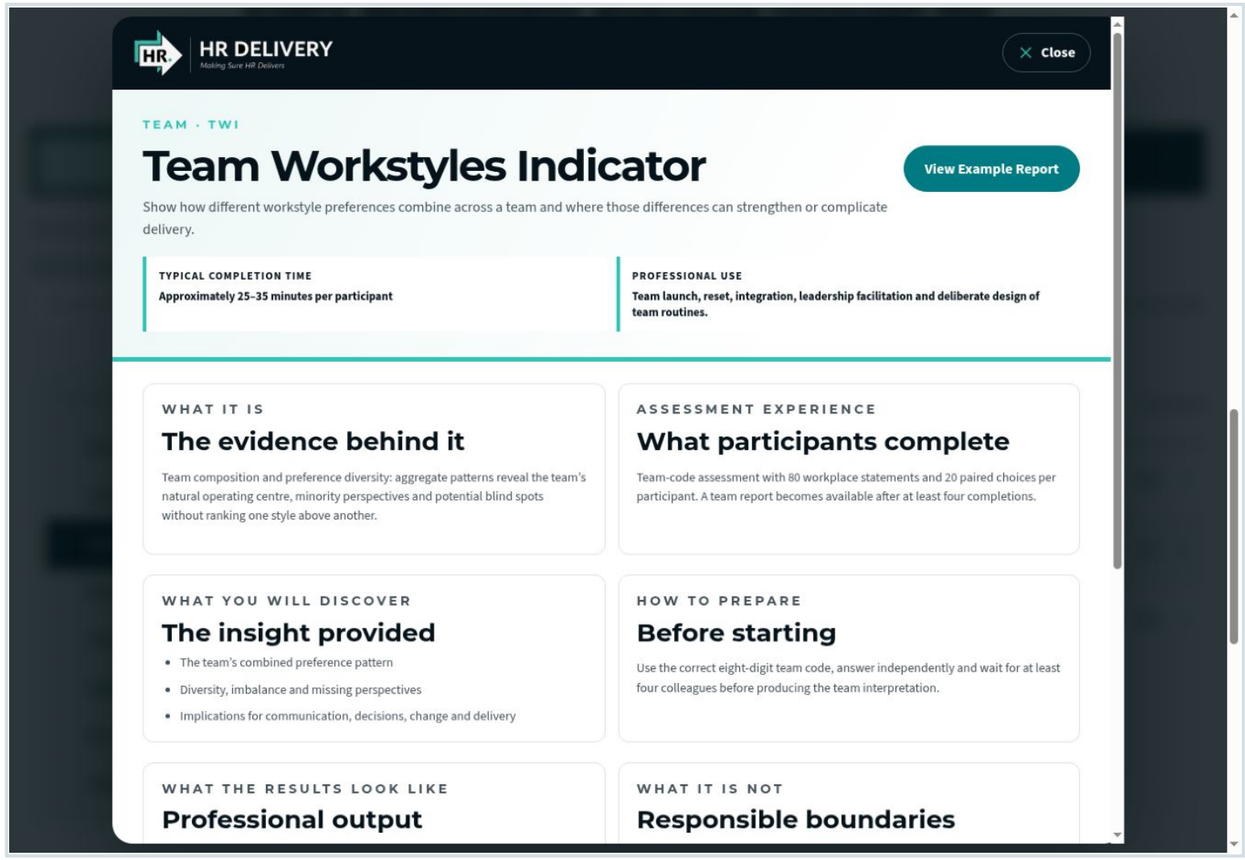
CHECK The report has an explicit population and purpose.

02 Use 'Manage & report'

Select the appropriate organisation or analytics report through the actual private controls. Confirm the available filters and export choices with the administrator.

CHECK The report corresponds to the intended scope.

PRIOR REVIEWED SCREEN



Team Workstyles factsheet illustrates the purpose of a team assessment.

READ, COMBINE AND DISCUSS RESULTS / STEPS 3–4 OF 5

OPEN SOURCE

Use team and organisation reporting

03 Reconcile the underlying evidence

Check the number of assigned, completed and included records. Identify missing data or different instruments before comparing groups.

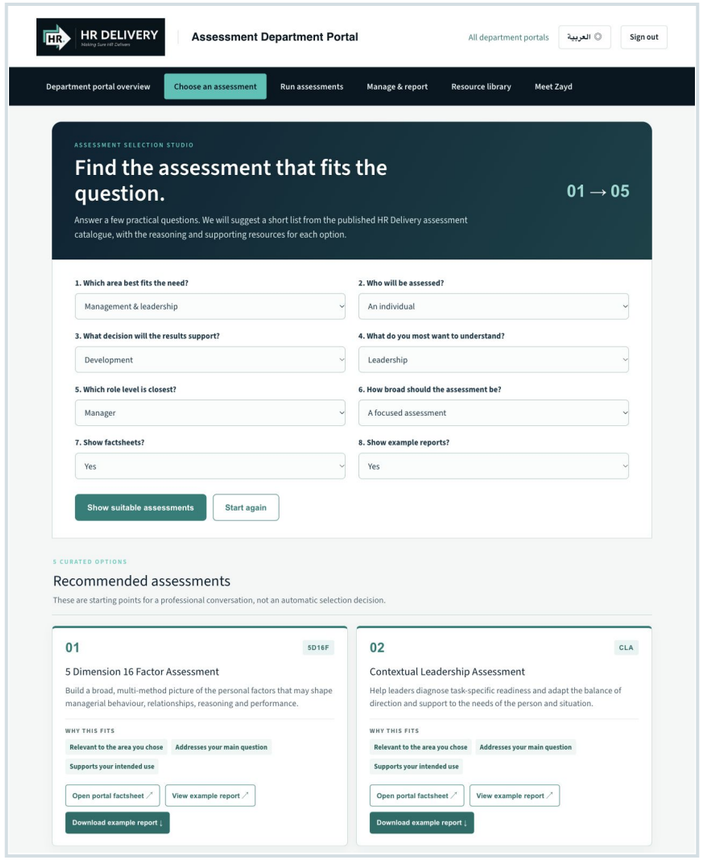
CHECK The analysis rests on a known evidence base.

04 Interpret patterns carefully

Use group findings to guide enquiry and development. Avoid identifying an individual indirectly in a small group or presenting incomplete data as a whole-organisation conclusion.

CHECK The findings are proportionate to the evidence and audience.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

READ, COMBINE AND DISCUSS RESULTS / STEPS 5–5 OF 5

OPEN SOURCE

Use team and organisation reporting

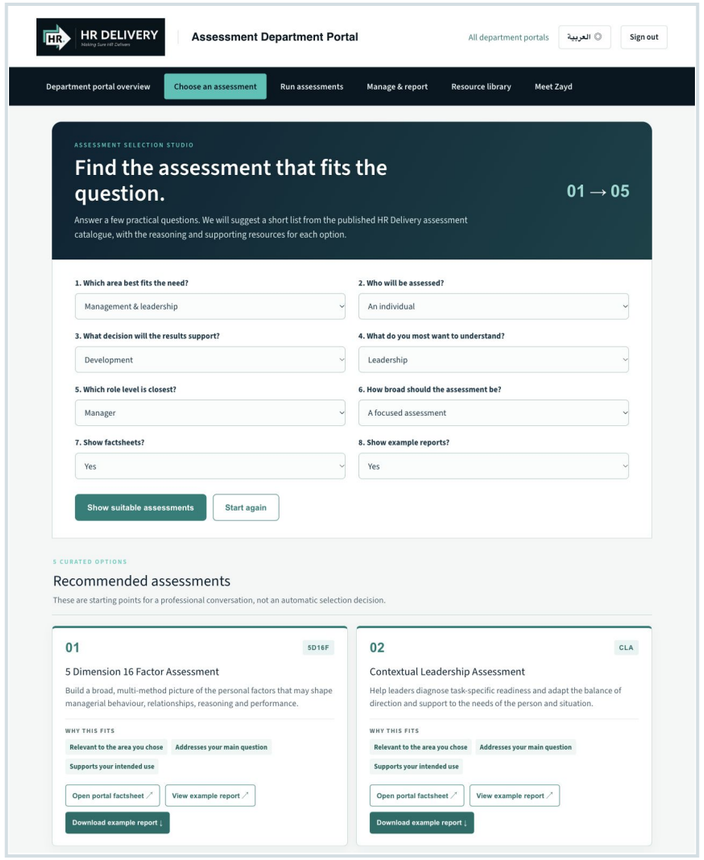
05

Document actions and reporting limits

Agree owners and review dates, and record any scope or completeness qualification when presenting or exporting the report.

CHECK The organisation can act on the findings responsibly.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

05 Build competency assessments

Prepare the specification before using a protected builder.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

BUILD COMPETENCY ASSESSMENTS / B-05-01

OPEN SOURCE

Prepare a behavioural competency build

Define a clear behavioural assessment specification.

WHO USES THIS Assessment designer with authorised practitioner

BEFORE YOU BEGIN

- Approved behavioural framework
- Target role level
- Purpose and evidence standard

WHAT YOU WILL HAVE

- Behavioural assessment blueprint
- Reviewed item/scoring specification

CHECK BEFORE YOU FINISH

- Indicators match the target level
- Item options are credible
- Scoring and reporting have expert review

An item measures knowledge rather than the intended behaviour

Review the scenario, response demand and scoring rationale against the behavioural indicator before entering it into the build.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

This is the preparation sequence for the described builder. Its private authoring, scoring and preview controls were not inspected.

BUILD COMPETENCY ASSESSMENTS / STEPS 1–2 OF 6

OPEN SOURCE

Prepare a behavioural competency build

01 Confirm the behavioural target

Identify the framework and maturity level that apply to the role. Use the organisation's approved behavioural definitions rather than broad labels alone.

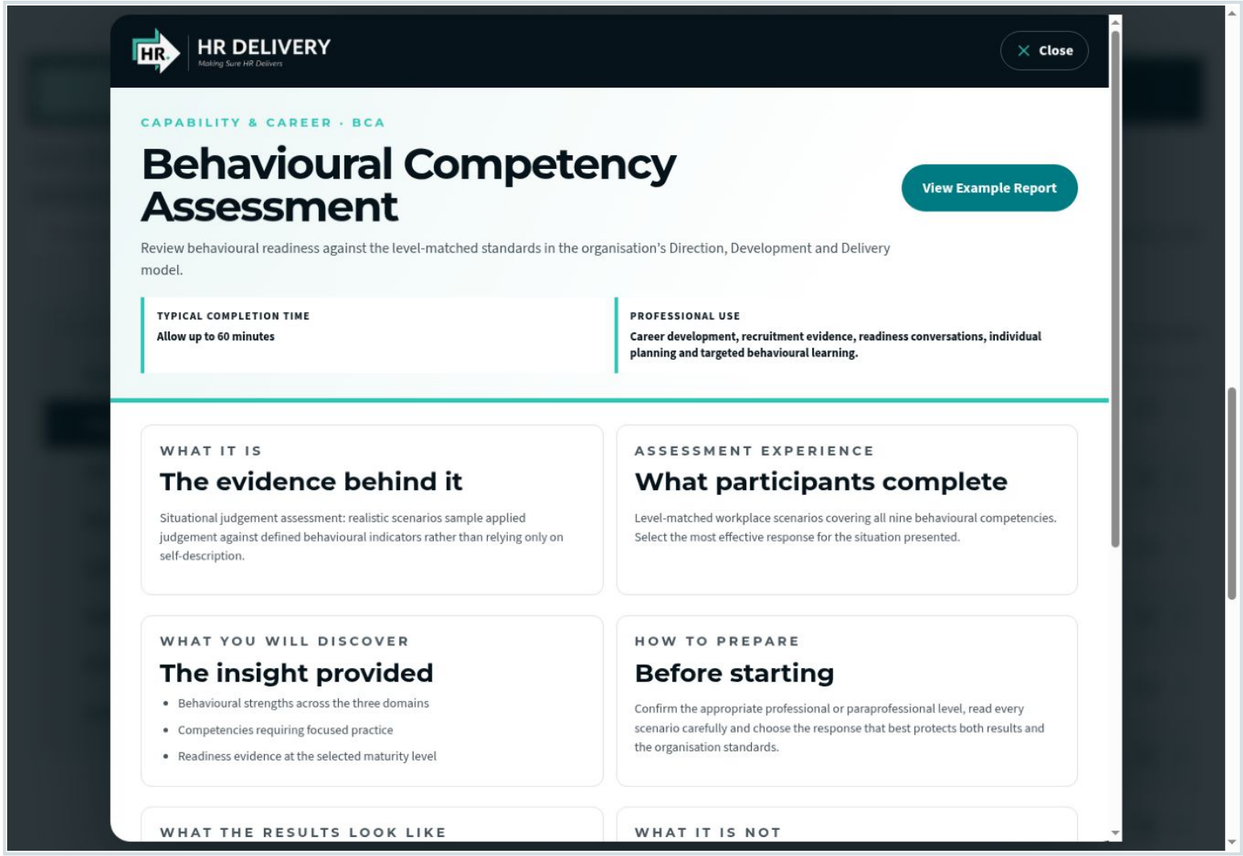
CHECK The assessed behaviours are explicit and level-appropriate.

02 Select the intended coverage

Decide which competencies and indicators must be represented and how the assessment will sample them. Document any exclusions before authoring.

CHECK The blueprint can be checked against the purpose.

PRIOR REVIEWED SCREEN



Public Behavioural Competency Assessment factsheet, providing the purpose and response context.

BUILD COMPETENCY ASSESSMENTS / STEPS 3–4 OF 6

OPEN SOURCE

Prepare a behavioural competency build

03 Prepare plausible workplace evidence

Draft realistic situations and credible alternatives that distinguish the intended judgement. Avoid an obviously desirable answer pattern or irrelevant reading demands.

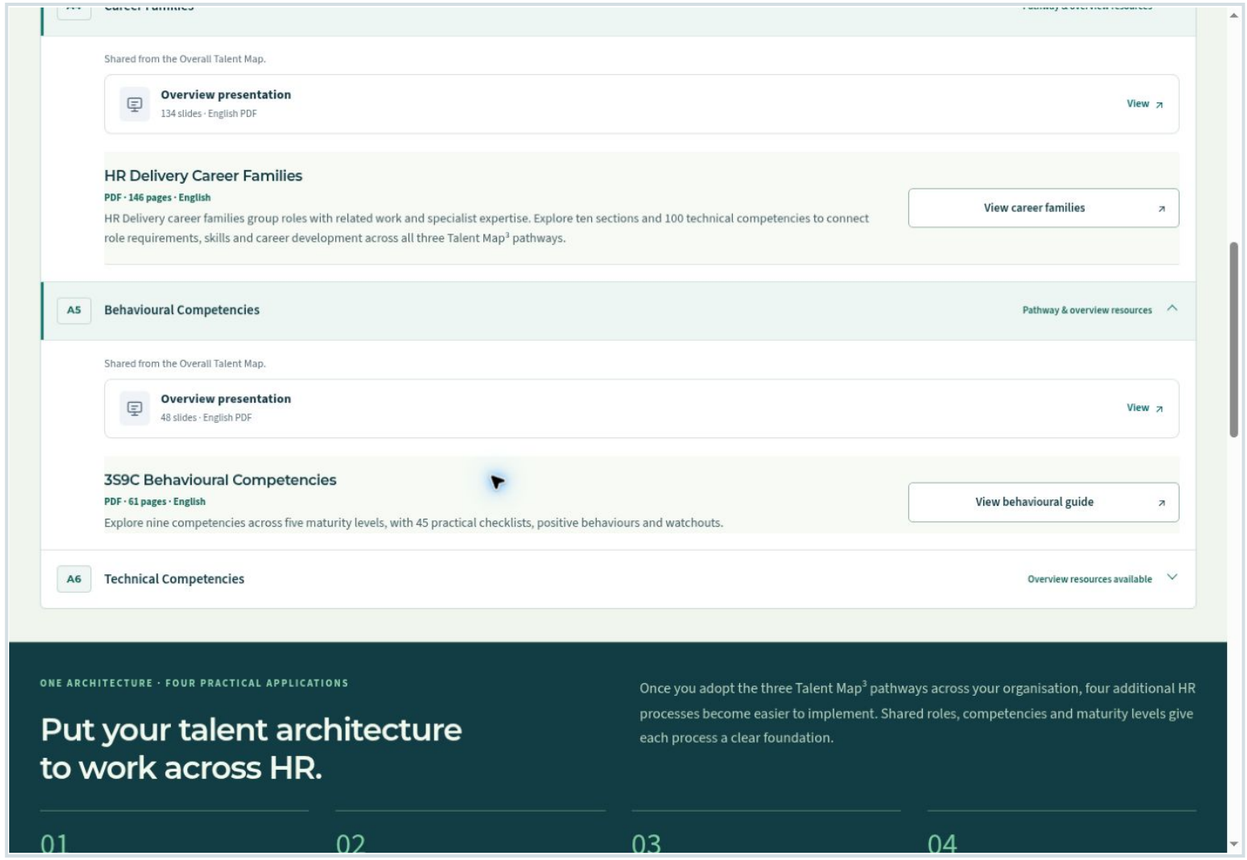
CHECK Items elicit the intended behavioural evidence.

04 Specify scoring and interpretation

Document the scoring rationale, expected report themes and how results will be reviewed. Plan expert review and piloting before operational use.

CHECK The interpretation is supported by an explicit design rationale.

PRIOR REVIEWED SCREEN



Behavioural directory used to define level-specific expectations.

BUILD COMPETENCY ASSESSMENTS / STEPS 5–6 OF 6

OPEN SOURCE

Prepare a behavioural competency build

05 Use the authorised behavioural builder

Transfer the approved specification into the private builder after confirming its exact fields, preview and review process with the administrator.

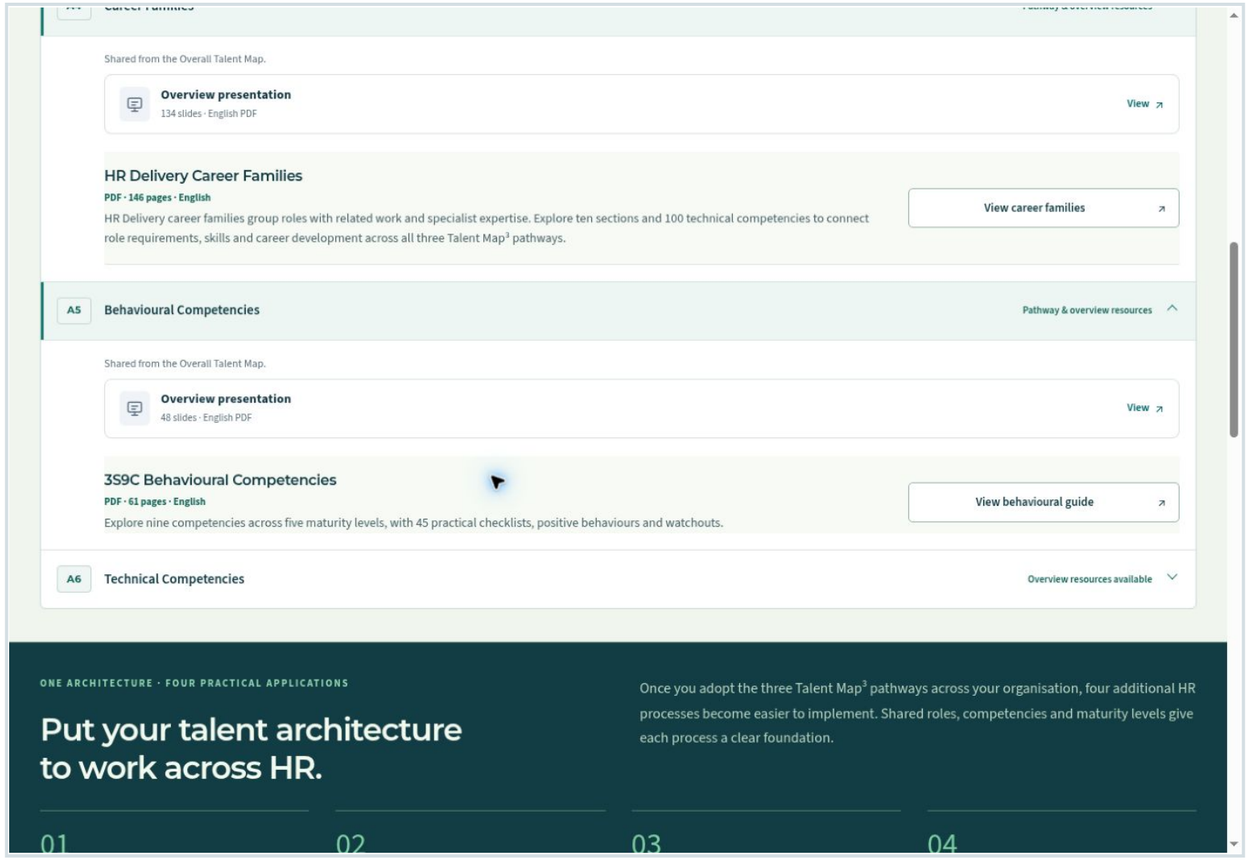
CHECK The configured form can be checked against the approved blueprint.

06 Preview before allocation

Check wording, response options, scoring links and report labels in a suitable test context. Obtain the required professional review before release.

CHECK The assessment is ready for controlled validation and use.

PRIOR REVIEWED SCREEN



Behavioural directory used to define level-specific expectations.

BUILD COMPETENCY ASSESSMENTS / B-05-02

OPEN SOURCE

Prepare a technical competency build

Match assessment content to the correct career family and proficiency level.

WHO USES THIS Technical subject-matter expert and assessment designer

BEFORE YOU BEGIN

- Approved career family
- Required technical competencies and level
- Current technical references

WHAT YOU WILL HAVE

- Technical blueprint
- Reviewed technical item bank and scoring key

CHECK BEFORE YOU FINISH

- Family and proficiency level are correct
- Technical content is current
- Ambiguity is resolved by expert review

A technical reference is country-specific Confirm its applicability to the target role and revise the item or allocation context before use.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private builder controls and scoring execution remain unverified.

BUILD COMPETENCY ASSESSMENTS / STEPS 1–2 OF 6

OPEN SOURCE

Prepare a technical competency build

01 Confirm the career-family context

Select the actual work domain and required level. Distinguish core requirements from additional supporting technical skills.

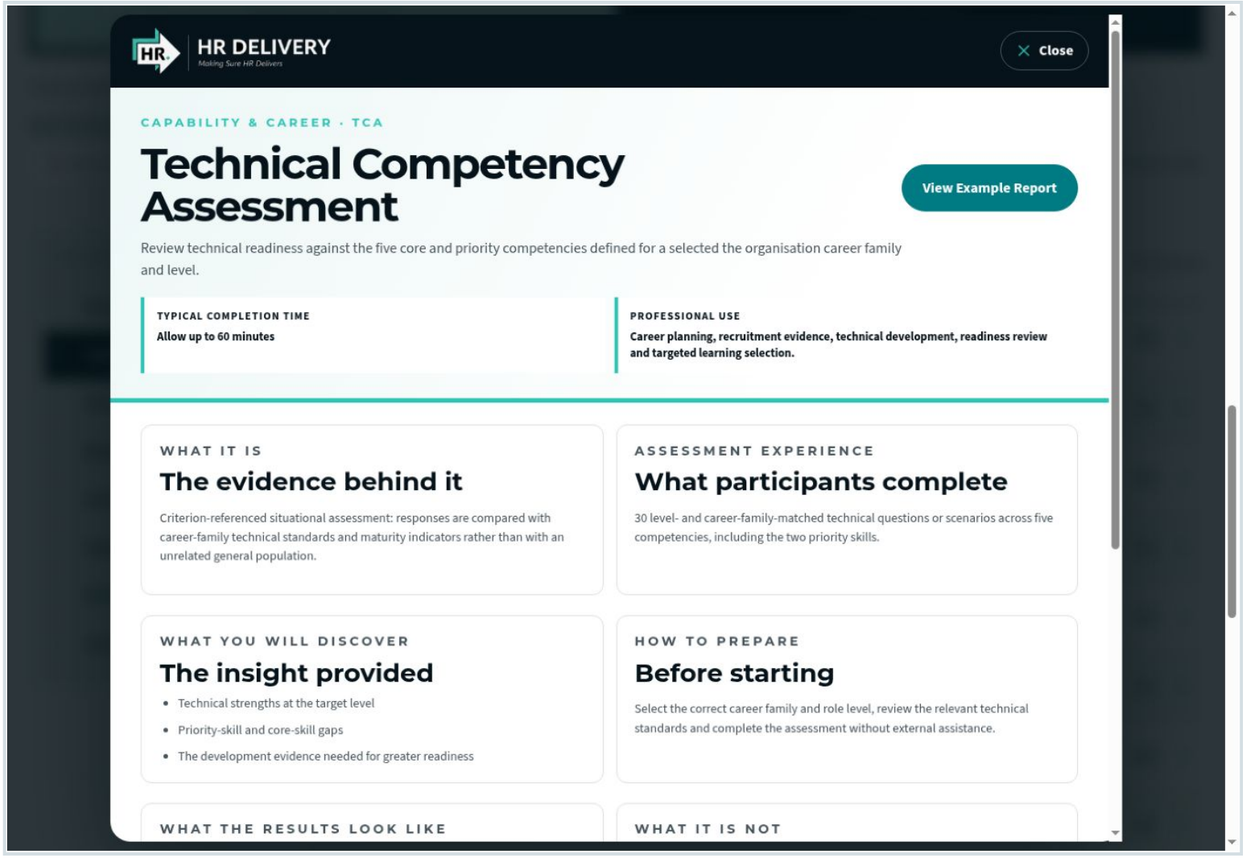
CHECK The blueprint reflects the selected job family.

02 Translate requirements into evidence

Define what a competent response should demonstrate: interpretation, application, diagnosis, planning or another work-relevant capability.

CHECK Each item has an explicit technical evidence target.

PRIOR REVIEWED SCREEN



Public technical assessment factsheet.

BUILD COMPETENCY ASSESSMENTS / STEPS 3–4 OF 6

OPEN SOURCE

Prepare a technical competency build

03 Draft realistic technical situations

Use content accurate for the relevant context and jurisdiction. Avoid rewarding familiarity with an unrelated employer's procedures.

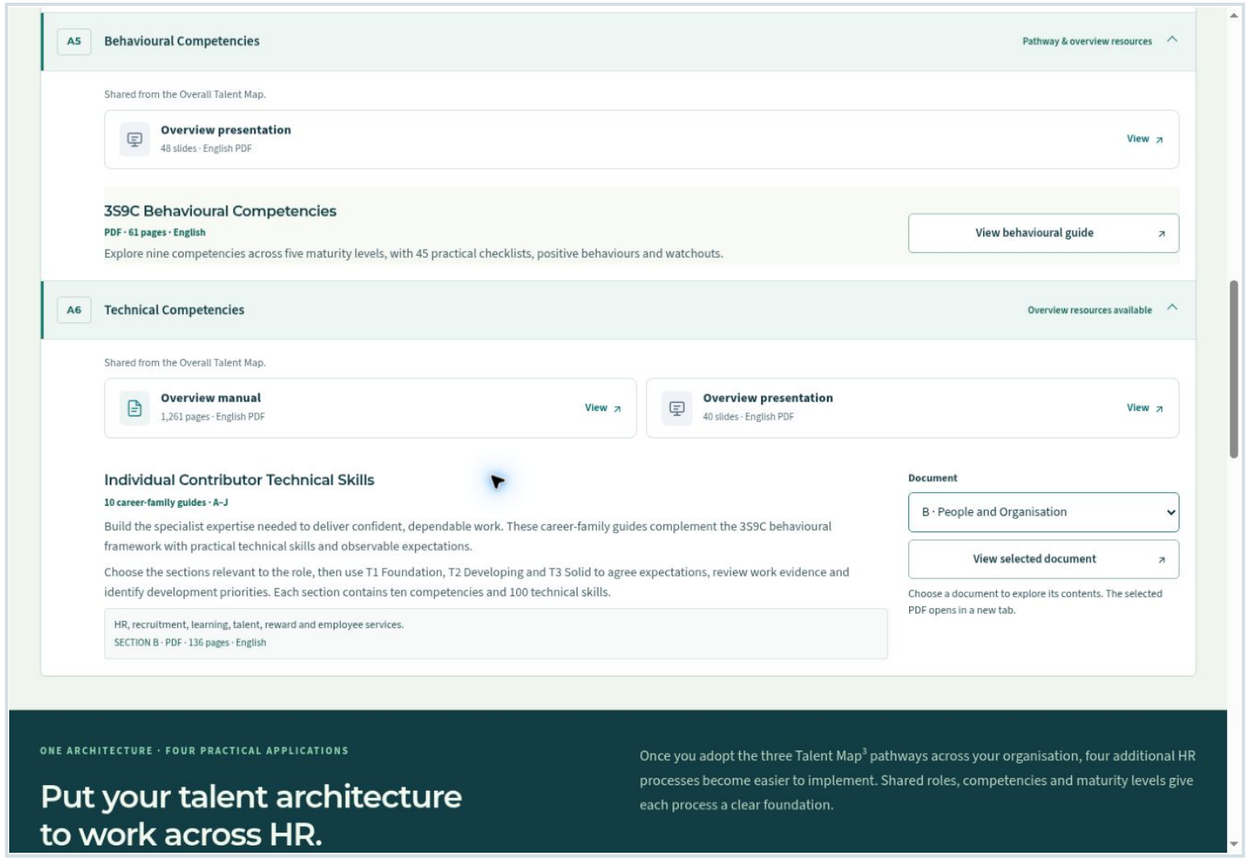
CHECK The questions are relevant to the intended participants.

04 Review the answer key

Have subject-matter experts check the scoring key, acceptable rationale and ambiguity. Retain source references and the content review date.

CHECK Scoring is defensible and current for the assessed work.

PRIOR REVIEWED SCREEN



Technical directory used to locate the relevant career-family requirements.

BUILD COMPETENCY ASSESSMENTS / STEPS 5–6 OF 6

OPEN SOURCE

Prepare a technical competency build

05 Configure and preview the technical builder

Use the authorised private builder once its controls and output options are confirmed. Check family, level and item coverage against the blueprint.

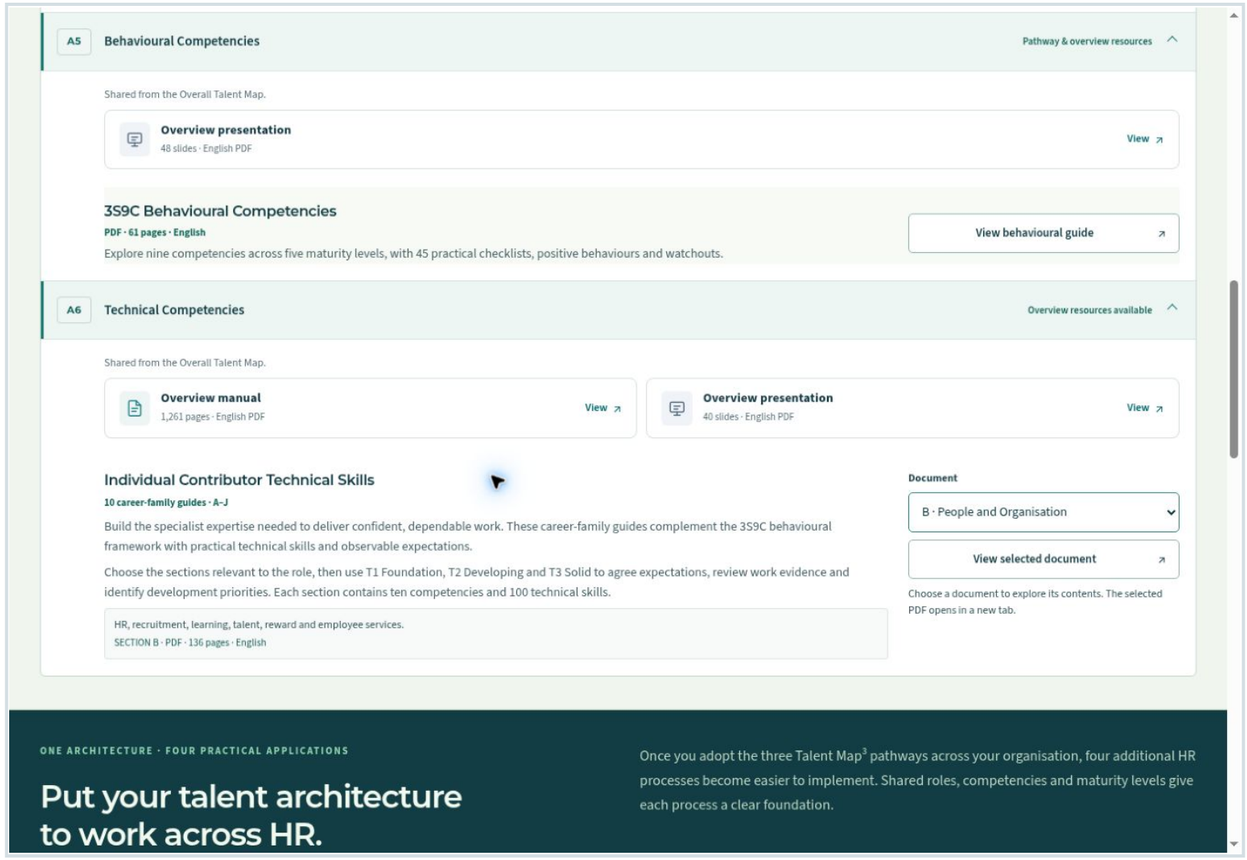
CHECK The configured assessment matches its intended technical scope.

06 Plan validation and maintenance

Review pilot evidence and document how changes to technical standards will trigger content updates.

CHECK The assessment has an owner and a maintenance approach.

PRIOR REVIEWED SCREEN



Technical directory used to locate the relevant career-family requirements.

BUILD COMPETENCY ASSESSMENTS / B-05-03

OPEN SOURCE

Prepare a combined competency build

Bring behavioural and technical evidence together in a coherent assessment.

WHO USES THIS Assessment lead with behavioural and technical experts

BEFORE YOU BEGIN

- Approved behavioural blueprint
- Approved technical blueprint
- Defined integrated purpose

WHAT YOU WILL HAVE

- Combined assessment specification
- Reviewed integrated reporting plan

CHECK BEFORE YOU FINISH

- Both components serve the purpose
- Completion burden is reviewed
- Any integration rule is explicit and supported

A single combined score hides important gaps — Retain interpretable component results and revisit the integration rule with the assessment lead.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The three builders are identified in the supplied administration catalogue; their private configuration screens were not available for inspection.

BUILD COMPETENCY ASSESSMENTS / STEPS 1–2 OF 6

OPEN SOURCE

Prepare a combined competency build

01 Define the combined question

State why both behavioural and technical evidence are needed for the role or development decision. Do not combine tools only to create a longer assessment.

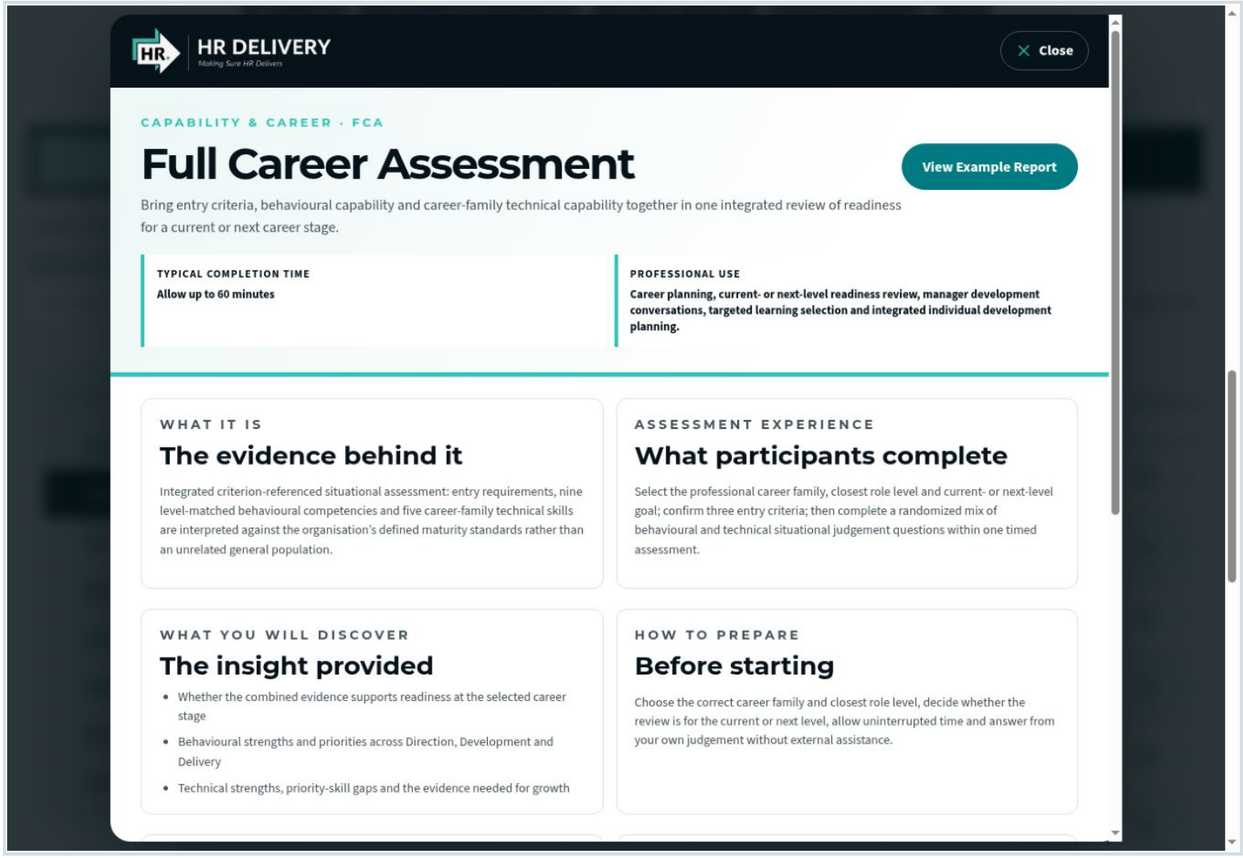
CHECK The combined design has a clear evidence purpose.

02 Set coverage and participant burden

Check competency coverage, response formats and expected completion time across both parts. Remove unintended duplication.

CHECK The participant workload is proportionate and coherent.

PRIOR REVIEWED SCREEN



Integrated career-assessment factsheet illustrates how behavioural and technical evidence may be connected.

BUILD COMPETENCY ASSESSMENTS / STEPS 3–4 OF 6

OPEN SOURCE

Prepare a combined competency build

03 Keep scoring components interpretable

Specify how each part is scored and reported. Do not invent an overall readiness threshold without an adopted rationale and validation evidence.

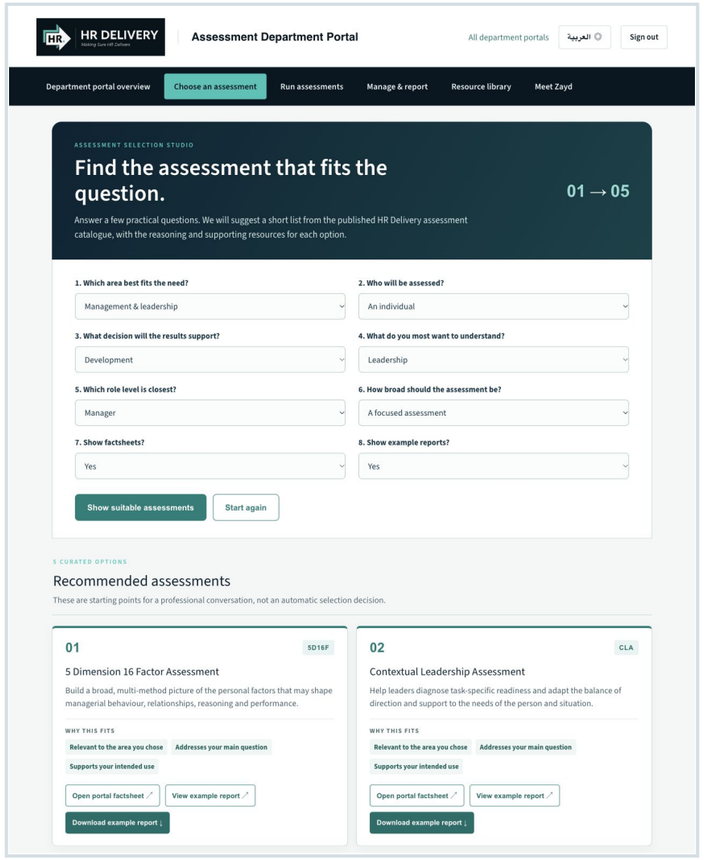
CHECK Readers can understand the contribution of each component.

04 Configure through the combined builder

Use the private combined behavioural/technical builder after confirming the supported configuration, preview and review controls.

CHECK The build matches the approved combined specification.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

BUILD COMPETENCY ASSESSMENTS / STEPS 5–6 OF 6

OPEN SOURCE

Prepare a combined competency build

05 Review the integrated report

Check that strengths, gaps and recommended next steps follow from the actual evidence and that missing components are visible.

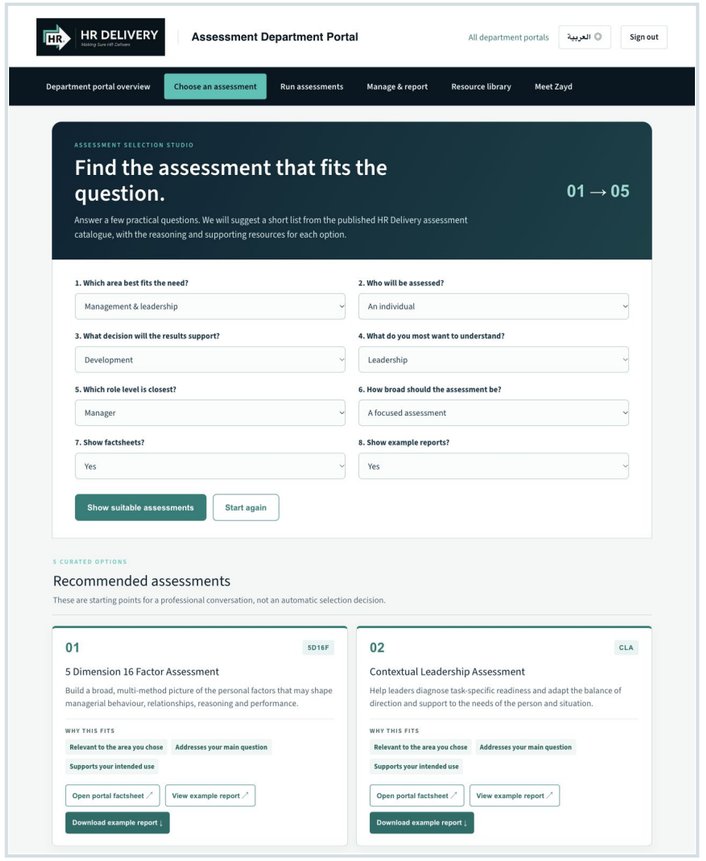
CHECK The final report supports a clear, qualified discussion.

06 Approve the intended use

Complete professional and technical review, pilot checks and the organisation’s release process before allocating the form.

CHECK The design is ready for its authorised use and ongoing review.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

06 Resources and feedback

Keep interpretation support close to the assessment work.

01 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

RESOURCES AND FEEDBACK / B-06-01

OPEN SOURCE

Use practitioner resources and Meet Zayd

Locate guidance and prepare a useful specialist-support request.

WHO USES THIS Practitioner or assessment administrator

BEFORE YOU BEGIN

- Instrument or pathway name
- Purpose and participant context
- Specific guidance question

WHAT YOU WILL HAVE

- Relevant practitioner resource
- Prepared feedback plan
- Focused support enquiry

CHECK BEFORE YOU FINISH

- Instrument and guide edition match
- The report audience is authorised
- AI interface presence is not confused with a human reply

A guide or specialist function is unavailable	Give Lama the exact title, portal area and access issue so the team can confirm entitlement or the current route.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Resource library and Meet Zayd labels are published. Private downloads and specialist-provider delivery were not tested.

RESOURCES AND FEEDBACK / STEPS 1–2 OF 5

OPEN SOURCE

Use practitioner resources and Meet Zayd

01 Open 'Resource library'

Use the portal area shown in HR Delivery's demonstration. Locate the relevant handbook, interpretation guide or feedback material for the assessment.

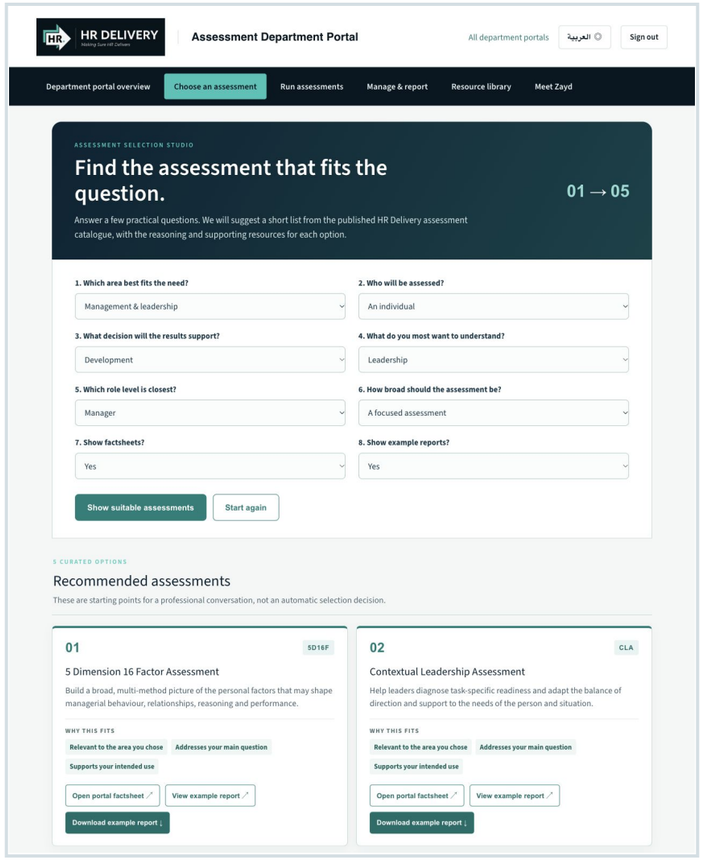
CHECK The resource corresponds to the instrument you are using.

02 Check the document edition and language

Use the current approved guide and the appropriate English or Arabic resource where available. Keep the assessment/report version aligned with the guidance.

CHECK Interpretation is based on the intended edition.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

RESOURCES AND FEEDBACK / STEPS 3–4 OF 5

OPEN SOURCE

Use practitioner resources and Meet Zayd

03 Prepare the feedback conversation

Review the report themes, participant questions and practical actions. Plan how you will explain both the value and limits of the evidence.

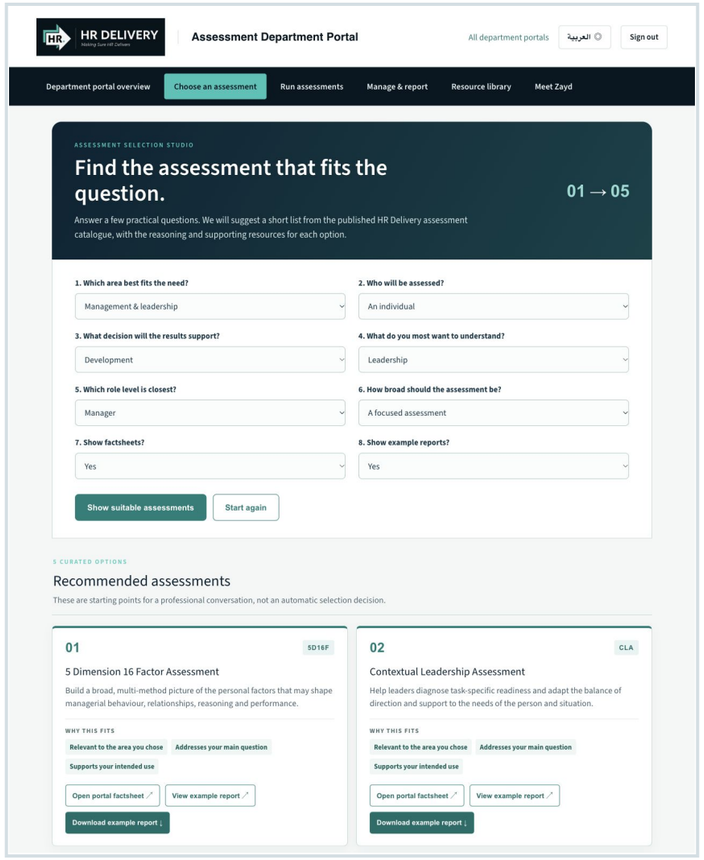
CHECK Feedback can be delivered clearly and constructively.

04 Use 'Meet Zayd' for the specialist route

The published portal navigation names Zayd. Use the service's stated contact route for assessment guidance; check the current connection status of any communication interface.

CHECK The enquiry reaches the appropriate support route.

PUBLISHED DEMONSTRATION



Published Assessment Department demonstration with navigation and the selection studio; synthetic demonstration, not client records.

RESOURCES AND FEEDBACK / STEPS 5–5 OF 5

OPEN SOURCE

Use practitioner resources and Meet Zayd

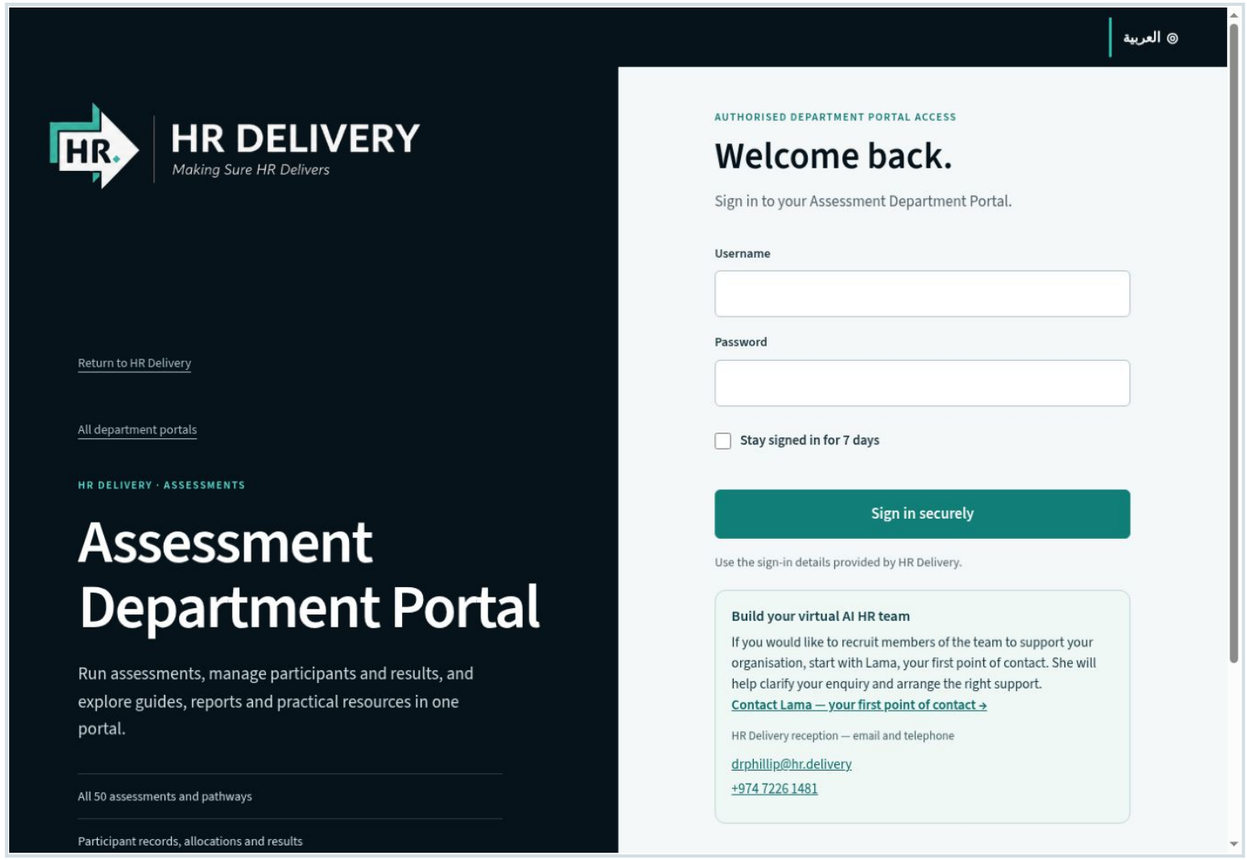
05

Escalate a specific question through Lama

Provide the instrument, purpose and issue without sending passwords or unnecessary participant data. Ask for the relevant resource or specialist conversation.

CHECK Support can address a clear and appropriately scoped request.

CURRENT LIVE SCREEN



Current Assessment sign-in screen with the Lama contact route for access and service enquiries.

REFERENCE / 1 OF 1

OPEN SOURCE

Assessment catalogue • Strategy and culture

Instrument	Use before you allocate
Strategy Knowledge Assessment	Knowledge of the organisation’s approved strategy.
Cultural Match Assessment	Work expectations and the organisation’s culture.
Personal Strengths Navigator	Personal strengths and useful development conversations.

REFERENCE / 1 OF 1

OPEN SOURCE

Assessment catalogue • Capability and career

Instrument	Use before you allocate
Full Career Assessment	Entry criteria, behavioural and technical career readiness.
Behavioural Competency Assessment	Level-matched behavioural judgement.
Technical Competency Assessment	Career-family technical readiness.
Learning Preference Questionnaire	Learning preferences for a practical development plan.
Career Compass Assessment	Career direction and development choices.
Work Styles Indicator	Individual work-style patterns.
Conflict Response Assessment	Responses to workplace conflict.
Personality Pattern Profile	Personality-related work patterns.
The Relate Map Assessment	Relationship and interpersonal patterns.
Personal Insights Profile	Personal insight and development themes.

REFERENCE / 1 OF 1

OPEN SOURCE

Assessment catalogue • Team

Instrument	Use before you allocate
Team Workstyles Indicator	Team work-style diversity and collaboration.
Team Contribution Profile	Preferred team contributions.
Team Performance WatchPoints	Potential team performance issues and discussion priorities.

REFERENCE / 1 OF 1

OPEN SOURCE

Assessment catalogue • Management

Instrument	Use before you allocate
Managerial Assumptions, Arguments and Conclusions Assessment	Tests critical thinking through objective management scenarios.
Managerial Situational Judgement Test	Reviews management decisions through realistic scenarios and plausible response options.
5 Dimension 16 Factor Assessment	A broad view of factors relevant to managerial behaviour.

REFERENCE / 1 OF 1

OPEN SOURCE

Assessment catalogue • Leadership

Instrument	Use before you allocate
Leadership Preference Profile	Preferred areas of leadership contribution.
Leadership Situational Judgement	Judgement in leadership situations.
Leadership 360 Feedback	Self-view compared with feedback from colleagues.
Contextual Leadership Assessment	Diagnosis of task readiness and adaptive leadership.
Shadow Self Assessment	Less visible patterns and development reflection.
Emotional Intelligence Assessment	Emotional capabilities in self-management and relationships.

REFERENCE / 1 OF 1

OPEN SOURCE

Assessment catalogue • Cognitive ability

Instrument	Use before you allocate
Numerical and Data Reasoning	Numerical and data reasoning.
Abstract and Adaptive Reasoning	Abstract and adaptive reasoning.
Cognitive Processing and Learning Speed	Reviews how quickly and accurately participants understand unfamiliar information, learn rules and apply them.
Attention, Accuracy and Error Detection	Uses timed checking tasks to explore sustained attention, discrepancy detection and response control.
Executive Planning and Prioritisation	Uses planning scenarios to examine objectives, sequencing, resources, constraints and changing priorities.
Systems Reasoning and Complex Problem Solving	Examines problem framing, boundaries, causes, interdependencies, evidence and consequences through systems cases.

REFERENCE / 1 OF 1

OPEN SOURCE

Assessment catalogue • Simulations

Instrument	Use before you allocate
Direction Simulation	Presents fifteen connected exercises across three waves to observe strategic focus, stewardship and future thinking.
Development Simulation	Presents fifteen connected exercises on engagement, partnership and capability growth.
Delivery Simulation	Presents fifteen connected exercises on ownership, experience and operational judgement.

REFERENCE / 1 OF 2

OPEN SOURCE

Thirteen combined pathways

Pathway	Use
Personal Development	Connects learning preferences, workstyle, motives and behavioural forces to create a coherent individual development plan.
Personal Discovery	Brings strengths, relationship needs and conflict response into one interpersonal-impact conversation.
Career	Combines career interests, a broad factor profile and preferred work conditions.
Team	Examines how a team works, the contributions available and the conditions supporting performance.
General Management Development	Combines critical thinking, management judgement and broader personal factors.
General Leadership Development	Connects assessed leadership judgement, natural preference and situational adaptability.
Leadership Discovery	Links experienced leadership impact with emotional capabilities and pressure-risk hypotheses.
Combined Leadership Assessment	Integrates standardised judgement with structured evidence of enacted behaviour.
Graduate Potential	Provides early-career evidence on numerical reasoning, novel problem solving and learning efficiency alongside separate personal-factor hypotheses.

REFERENCE / 2 OF 2

OPEN SOURCE

Thirteen combined pathways

Pathway	Use
High Potential Ability	Connects adaptive reasoning, learning efficiency and management-expression hypotheses.
Operational Reliability	Separates quantitative evidence use, processing efficiency and checking accuracy.
Managerial Execution	Connects evidence interpretation, planning and accuracy control.
Strategic Leadership Ability	Brings together critical reasoning, executive planning, systems thinking and quantitative judgement.

REFERENCE / 1 OF 1

OPEN SOURCE

Administration catalogue: 50 choices

Component	Count	How to use it
Named instruments	34	Select for a defined evidence question and read the factsheet.
Combined pathways	13	Confirm purpose, components and participant burden.
Competency builders	3	Prepare approved behavioural, technical or combined specifications.

QUICK REFERENCE

Your final check

- [ ] **01** State the evidence question before choosing a tool.
- [ ] **02** Confirm the participant, purpose, family and role level before allocation.
- [ ] **03** Reconcile assigned, completed and included records before reporting.
- [ ] **04** Use the correct practitioner guide and report edition.
- [ ] **05** Turn feedback into a specific action with a review date.

HELP AND SUPPORT

OPEN SOURCE

Continue with HR Delivery

Start with Lama when you need the correct workspace, an explanation of a tool, a missing resource or help arranging specialist support. Describe the task you were trying to complete and the last screen you reached. Include a redacted screenshot if useful, together with the record reference and relevant date.

OPEN LAMA'S RECEPTION

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INCLUDE IN YOUR REQUEST

- Department and workspace name
- Task and last control selected
- Record or document reference, without personal data
- Exact error wording and a redacted screenshot

REFERENCE NOTES

OPEN SOURCE

Guide scope and screen references

- Public screens and examples were inspected read-only. No client records were created, published, sent or approved.
- Screens labelled published demonstration show HR Delivery’s illustrative workspace, not this review’s authenticated access.
- Confirm private form labels, permission rules and save/export behaviour with the workspace administrator before using the source-described procedures operationally.
- The public catalogue shows 47 instruments/pathways; the portal advertises 50 choices when the three builders are included.
- No participant responses were submitted and no private scoring, allocation or report-release operation was tested.
- A public example-report reader may show a different page count from its factsheet description; check the actual current report edition rather than relying on a fixed page count.

Screen key: Current live screen | Published demonstration | Prior reviewed screen