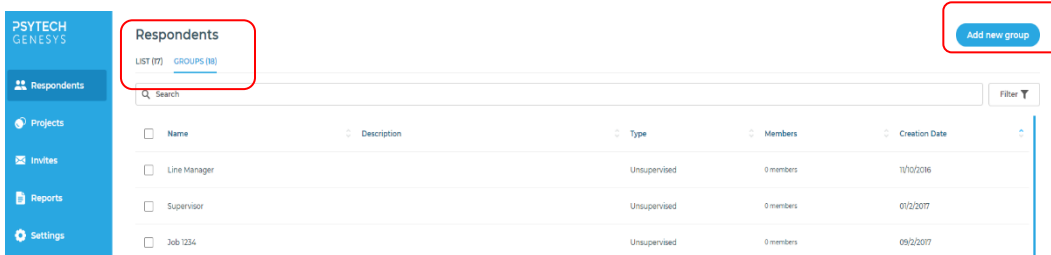


# How to set up a Managed Group Session on GeneSys

You will need to create a group before you can use the managed Group Method.

Click the **Groups** tab in the main respondent dashboard area and then click **Add new group**.



A pop-out window will appear to add your new group information. Simply enter in the group name and group description and click **Create**.

Add group name and group description to each field and then click **Create**.

## Add new group

Click on the box next to the group name to activate the actions bar.

Click on **Administer Managed Group Session**.

The screenshot shows the 'Respondents' interface. On the left, an 'Actions' menu is open, with 'Administer Managed Group Session' highlighted by a red box. The main area shows a table of groups. The first row is selected, showing a 'Managed Group Method' with 'Unsupervised' type, '0 members', and a 'Creation Date' of '07/2/2022'.

Name	Description	Type	Members	Creation Date
Managed Group Method		Unsupervised	0 members	07/2/2022

Select the assessment you wish to administer and the language.

Click on the **drop-down arrow** in the category box to toggle between the Questionnaires, Reasoning, Batteries and Favourites (Custom batteries) tabs.

The screenshot shows the 'Administer group session' dialog box. It has a 'Language' dropdown set to 'English' and a 'Category' dropdown set to 'Questionnaires'. The 'Questionnaires' category is expanded, showing options: 'Questionnaires', 'Reasoning', 'Batteries', and 'Favourites'. The 'Questionnaires' option is selected. Below the dropdowns, there is a checkbox for 'Respondent to create new record' which is unchecked. A 'START' button is at the bottom right.

If the respondents have not been added to your system, click on box next to **Respondent to Create a New Record**. This option will give the respondent an opportunity to type in their biographical information. They will be automatically added to your system within the managed group as they complete the assessment.

Click on **Start**.

## Administer group session



### Assessment info

Language  
English



Category  
Favourites



Favourites  
CRTB2V



To select multiple assessments, please create a custom battery in setting and select it here

Respondent to create new record

START

The dialogue box below will appear.

Please note that while the Managed Group Session is active, actions with the group will be limited. You will not be able to use the other functions on the actions bar for this group.

Click on **OK, GOT IT** to proceed.

You are about to launch a managed group session. While the session is active, actions with the group will be limited.

CANCEL

OK, GOT IT

The Managed Group Method window will appear.

The assessment and Language will appear on the top right side of the window.

The session link will appear under the group name on the left side of the session window.

PSYTECH GENESYS

GROUPS > MANAGED GROUP METHOD

Managed Group Method  
Managed group session in progress

Assessment CRTE2V Language English (EN) END SESSION

Session link  
<https://genesys2020.genesysonline.net/launch/HDQQA4>

Respondent sessions (0)

Name	Email Address	Status	Id
------	---------------	--------	----

No respondents to display

You may add respondents to the group from the existing respondents' list, or they can create new records during the session authorization via the session link

The administered group session has been created

Click on the circle next to the session link to copy the link.

Share the link with your respondents via email or any convenient method.

Session link  
<https://genesys2020.genesysonline.net/launch/HDQQA4>



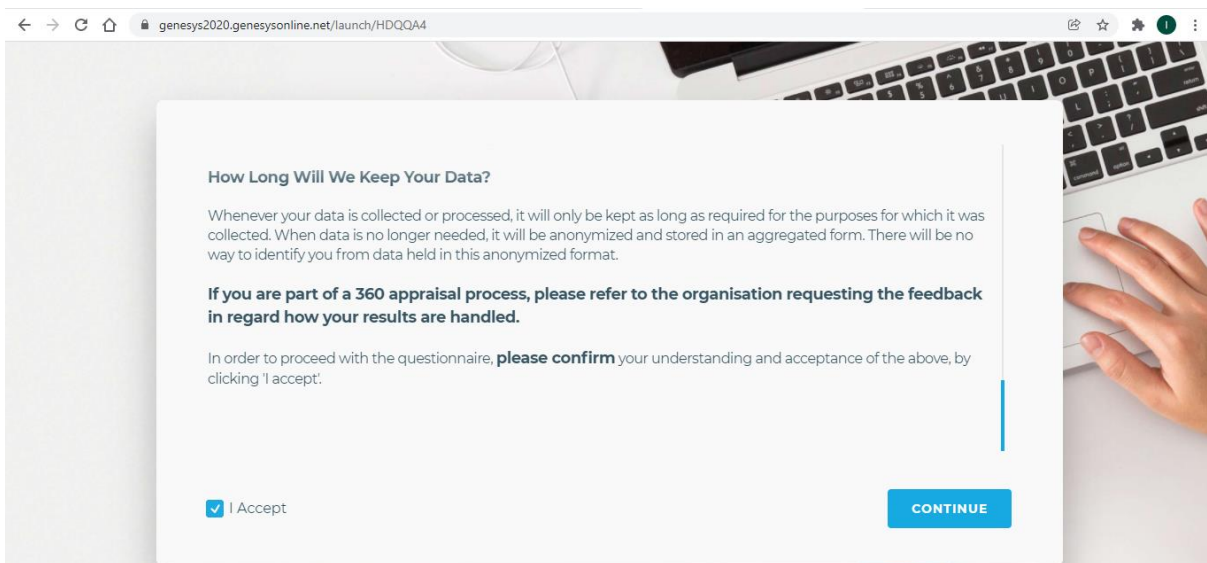
Respondents can click on the link or paste it onto the address bar in the internet browser.

A privacy statement window will appear.

Drag down the blue bar on the right side of the privacy statement window to read it.

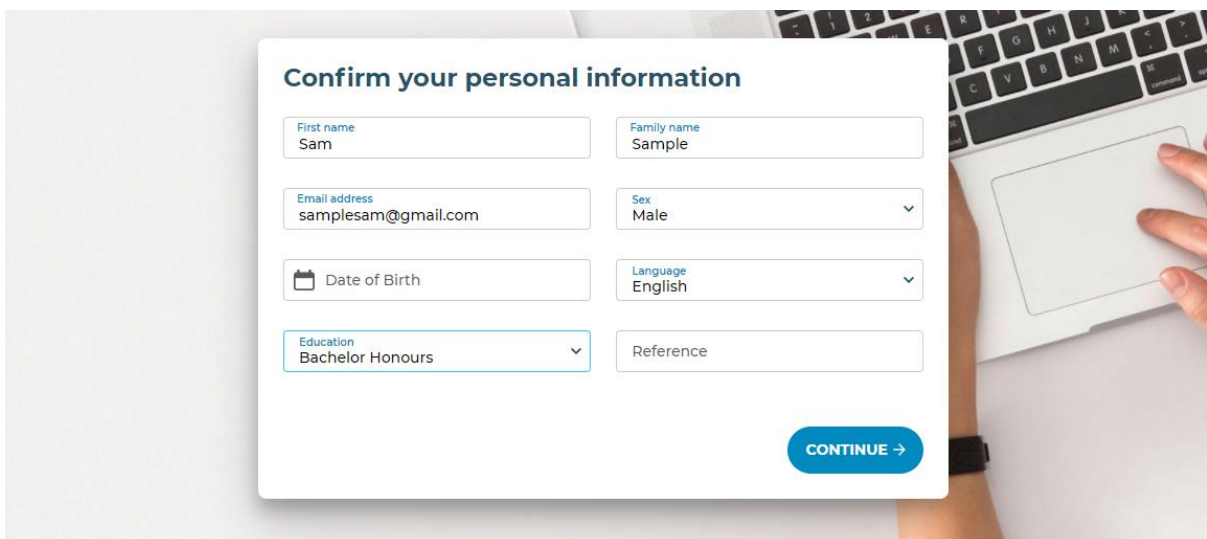
Click on **I Accept** to proceed. Please note, you will not be able to accept the privacy statement before dragging down the blue bar on the side.

Click on **Continue**.



Fill in your personal information and click on continue.

Click on Continue.



The respondent will come across a window that says **please stand by**.

They will have to wait for the administrator to authorise.



The respondent or respondents will appear in the session window. Their status will reflect as unauthorised.

Click on the box next to the respondent's name to activate the **actions bar**.

Click on **Authorise**.

Actions

GROUPS > MANAGED GROUP METHOD

Managed Group Method  
Managed group session in progress

Assessment CRTB2V Language English (EN) END SESSION

Session link  
<https://genesys2020.genesysonline.net/launch/HDQQA4>

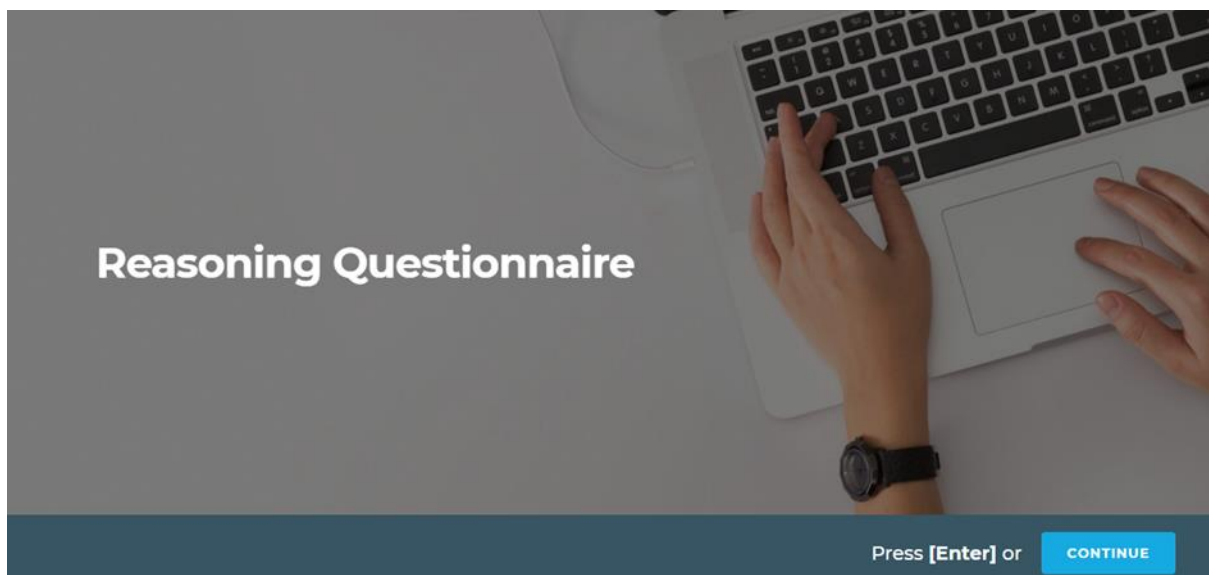
Respondent sessions (1)

<input checked="" type="checkbox"/>	Name	Email Address	Status	Id
<input checked="" type="checkbox"/>	Sam Sample	samplesam@gmail.com	UNAUTHORIZED	317042

The respondent's status will change to Authorized. They will now be able to proceed with the assessment.

The respondent will be taken to the starting window for the assessment. They can click on **continue** and begin the assessment.

<input type="checkbox"/>	Name	<input type="checkbox"/>	Email Address	<input type="checkbox"/>	Status	<input type="checkbox"/>	Id	<input type="checkbox"/>
<input type="checkbox"/>	Sam Sample		samplesam@gmail.com		<b>AUTHORIZED</b>		317042	



Once the respondent has completed the assessment, their status on the session window will change to completed.

Click on the End Session button on the top right corner of the session window.

You can now generate reports.

## Managed Group Method

Managed group session in progress

Assessment  
CRTB2V

Language  
English (EN)

END SESSION

Session link

<https://genesys2020.genesysonline.net/launch/HDQQA4>

### Respondent sessions (1)

<input type="checkbox"/>	Name	<input type="checkbox"/>	Email Address	<input type="checkbox"/>	Status	<input type="checkbox"/>	Id	<input type="checkbox"/>
<input type="checkbox"/>	Sam Sample		samplesam@gmail.com		COMPLETED		317042	