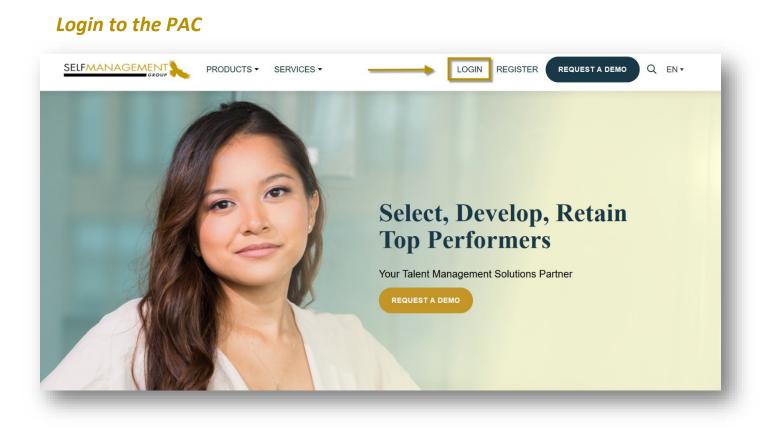


POP[™] Administration Center (PAC)

Online Tutorial





Please Note: If the **Self Management** Group has created a branded website for your organization please sign into the **POP Administration Center** (**PAC**) from your customized URL. Bookmark or add this website to your favorites for quick and easy access.

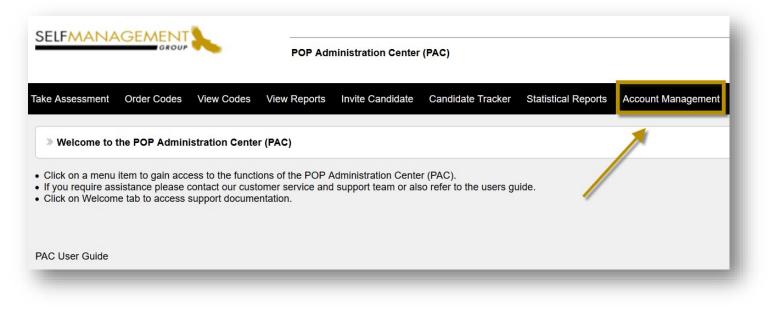
To access the **PAC** please direct your browser to the **SMG** Main Website located at:

www.selfmgmt.com

Enter your Username and Password.

FORGOT LOGIN INFO? Enter in your email address and your login information will be sent to you. A temporary password will be provided. You will be prompted to reset your password at first login attempt.

Account Management



Click on **ACCOUNT MANAGEMENT** to manage your account(s) and users. Access to this feature will allow you to:

- Edit Information
- Add Additional Accounts and Authorized Users
- Add and Edit Positions for Recruitment
- Customize Standard Message Templates

Super Administrators with access to the **ACCOUNT MANAGEMENT** feature have the ability to add or remove users as well as manage and maintain the account structure including:

- Set and modify permissions of users
- Pre-setting list of positions and messaging templates used in the employment or recruitment process



Account Management Levels of Access

	POP Adn	ninistration Center	(PAC)		
ake Assessment Order Codes View Codes	View Reports	Invite Candidate	Candidate Tracker	Statistical Reports	Account Management
» Account Management					
Click on an account to edit Click here to > <u>Add New Account</u> Click here to > <u>Edit Positions</u> Click here to > <u>Edit Messages</u>					
			Acc	count Structure	
ABC Company - Master REGION 1 REGION 2 REGION 2 REGION 3 REGION 3 REGION 4 District Name (Sub Account)					

The following diagram is a sample of an account structure which may be a subset of your organization's entire account.

Master Account: Authorized users at this level oversee all organizational activity.

Regional or Special Accounts: Users at this level view their own activity and that of sub accounts within the same region.

Sub Account or Branch: Users at this level view activity within their sub-account. If you would like users to view profiles administered by other, enabled the "V" which allows them to view other's activity.

User with restricted access within an account: Users with restricted access, view only those assessments which they themselves have administered (AOE).



Account Management - Edit Account

1	Account Information	Users
Type of Account	Parent Account	Action Settings Name UserName Telephone Email
Special Account (Regional Office) V		Login 🖂 🌽 🔒 AOMV vancouver SMVNCR
lame	Address	🖀 = Delete User 🖂 = EMail Intro Package 📝 = Edit User
REGION 1		A=Active O=Order Codes M=Manage Account V=View Others E=Email Notification
City	State/Province/Territory	A-Active V-Order Codes m-manage Account V-View Others E-Email Notification
		Add New User
/ip/Postal Code	Country	
Contact	Title	
Junaci	The	
Telephone	Fax	
EMail Address	Extra	Enable Desired Options
Industry SMG	✓ or add new	
options		<u> </u>
✓ Active ✓ Order Codes	Cand Feedback Add Resume Opini	ions Page
Email Notification La		
Sales Mgmt Email Notification La	ient 🗸	
Active Order Codes	anguage	ions Page

Account information is accessible and maintained by those with "Account Management (M)" access

Login Allows you to login as the user.	Sends the user their login ID and this guide.
Edits user's information and permissions.	Reinstates users' access

NEED TO MAKE CHANGES?

Click on the specific account to view existing details. Here you may edit the account information, changing the address, phone number, email address and contact information. The table to the right displays the authorized users within the specific account, their username and pre-set permissions.

A user can be granted many permissions and settings which are noted by the letters **AOMVE**; **A**= Active; **O**=Order Codes; **M**=Manage Account; **V**=View Others' Activity; **E**=Email notification of completed assessments.



Account Management – Adding a New User

PAC - Mozilla Firefox	– 🗆 X				
A 25 https://www.selfmgmt.com/cgi-bin/?		racker Statistical Rep	oorts Account Mana	gement LUNAN7	
» Add New User		`			
				Users	
Name		Action	Settings Name	UserName Telephone Email	
UserName		Login 🖂 🌽 🔒	AOMV vancouve	er SMVNCR	
Password				🗹 = EMail Intro Package 🎤 = Edit User	
Telephone (include ext.)			_		
Email Address		A=Active 0=Ord	er Codes M=Man	age Account <mark>V</mark> =View Others <mark>E</mark> =Emai	Notificat
Account Active		Add New User			
Order Codes 🔽					
Manage Account					
View Others' Activity					
Completed Assessments					
Notes					
EMail Intro Package					
Save Information					

Users with **MANAGE ACCOUNT** permission have complete access at their account level to manage account functions, manage users and view other activity.

To create a new user, enter their name, as well as a unique username and password that consists of minimum 6 alpha-numeric characters. Enter a telephone number and email address.

***To restrict a user's access within an account, check off "Account Active", "Order Codes" and "Email Notification of completed profiles" (AOE) This will provide the user access to only those assessments which they themselves have administered. ***



Account Management – Add New Account

Account Management Account Management Click here to > Add New Account Click here to > Edit Footione Click here to > Edit Messages ABC Company - Master ABC Company - Master REGION 1 District Name (Sub Account) REGION 2 District Name (Sub Account) REGION 3	les View Reports	Invite Candidate	Candidate Tracker	Statistical Reports	Account Manageme
Click here to > Add New Account Click here to > Edit Pocifion Click here to > Edit Messages ABC Company - Master ABC Company - Master Biotrict Name (Sub Account) Biotric					
Click here to Add New Account Click here to Edit Foottong Click here to Edit Messages ABC Company - Master ABC Company - Master BEGION 1 Bistrict Name (Sub Account) BEGION 2 Bistrict Name (Sub Account) Click here to Clic					
			Acc	count Structure	
District Name (Sub Account) REGION 2 District Name (Sub Account)					
► REGION 2 ► District Name (Sub Account)					
District Name (Sub Account)					
REGION 3					
District Name (aut Assessed)					
► District Name (sub Account)					
District Name (Sub Account)					
((/ 0000000)					

Click "<u>Add New Account</u>" to add Regions and Sub Accounts. Build your account structure including authorized users within each level.

The Master account administrator reserves the right to create a hierarchy of regions and sub accounts within the organization.

Regional account holders may also be granted access to do the same by adding new sub accounts below their region.



Account Management – Types of Accounts

New	Account Information
/pe of Account	Parent Account
Special Account (Regional Office) Sub Account (Branch/Agency) ity	Address State/Province/Territory
ip/Postal Code	Country
ontact	Title
elephone	Fax
Mail Address	Extra
ndustry select or add new V	r or add new
Active Order Codes Sales Mgmt Same as Assessment	nguage
erName Passv	word
Save Account	
io Back	

There are two types of accounts:

1. Special/Regional Account

Next highest level of access. Parent Company would be the Head Office/Master account.

2. Sub Account (Branch/Agency)

Lower level of access. Regional account then becomes the parent account for a Sub Account.



Account Management – Add New Position

The EDIT POSITIONS feature allows you to add and edit positions. • Click here to • Edit Positions

ke A	ssessment	Order Codes View Codes View	w Reports Inv	ite Candidate	Candidate Tr	acker	Statistic	al Reports:	Account Managemer
»	Edit Positions	1							
Add	New Position								
#	Account	Position	Assessment	Language	Auto-Reply	Fu	nction	Active	
1		Branch Manager	MPP3			Edit	Delete	$\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{$	
2		Domestic Helper				Edit	Delete	$\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{$	
3		Manager				Edit	Delete	$\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{$	
4		Sales Advisor				Edit	Delete	$\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{$	
5	REGION 2	Customer Service Representative				Edit	Delete	$\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{$	
6	REGION 1	Customer Service				Edit	Delete	$\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{\mathbf{$	
			1					Update	

Positions can be tied to a specific assessment and accounts. Sorting or filtering by position will be feasible when exporting candidate records within the **CANDIDATE TRACKER**.

Account Management – Messages

e Assessment Order Codes View Codes View Reports Invite Candidate Candidate Tracker S	tatistical Reports Account Management	
Edit Messages	😻 PAC - Mozilla Firefox — [×
Ir Messages Name Subject Message Global Thank You Thank You for Applying Thank You Yes > Edit dt New Message Image: Applying the second of the second	Add New Message Add New Message Add New Message Kame Subject Message (text or html)	
	Make Global 🗌 Save Message	.4

Click here to
Edit Messages

Standard Message templates are created by a super administrator and will become available for an account user to access.

Simplify your communication process by developing standard email communications to candidates. Templates can be chosen from a drop-down menu in the **CANDIDATE TRACKER** when following up with a candidate on next steps in the hiring process. Click on the email icon in the "**MSG**" column to select the desired message.

	Order Cedeo	Manu Cadaa	View Reports Invite Can	didata Candidate	Transferre	농 PAC - Google	Chromo				_		×
ssessment	Urder Codes	View Codes	view Reports Invite Can	didate Candidate	e Tracker	-							
Candidate Tra	okor				-	selfmgmt.	:om/cgi-bin/tra	acker.exe?funct	ion=msg&progi	amlang=eng8	Name=SA	MPLE	Q
	CKEI					» Send a Mes	sage						
From Date	vvvv/mm/dd	Assessment #	Page Position Filter		A								
2020/05/01 •			5 🔻		•	Select Message							
To Date	yyyy/mm/dd	Sort By	Status Filter		S		service@selfmgmt.c	com					
2020/05/31 •]	•			From Address							
Search:		Get Recor	ds	First Prev	Viewing 1	CC	•						
						Subject							
				1									
Candidates													
🗆 # Date	Nam	e	Email	Msg Resume	Interviev								
1 2020	/05/04 📿 W	/ITH EQ. SAMPI	E service@selfmgmt.com		_	Message Text							
			E service@selfmgmt.com		_								
2 2020	103/14 🖉 3/	AWFLE, SAWFL	E service@seringinc.com										
Actions:	Status	🗋 View Colu	imns					_					



Options to Administering an Assessment

ake Assessment Order Codes View Codes View Reports Invite Candidate Candidate Tracker Statistical Reports Account Manage > Welcome to the POP Administration Center (PAC) • Click on a menu item to gain access to the functions of the POP Administration Center (PAC). • If you require assistance please contact our customer service and support team or also refer to the users guide. • Click on Welcome tab to access support documentation.	SELFMANA	GEMENI	~	POP Adr	ninistration Center	(PAC)		
 Click on a menu item to gain access to the functions of the POP Administration Center (PAC). If you require assistance please contact our customer service and support team or also refer to the users guide. Click on Welcome tab to access support documentation. 	ake Assessment	Order Codes	View Codes	View Reports	Invite Candidate	Candidate Tracker	Statistical Reports	Account Management
If you require assistance please contact our customer service and support team or also refer to the users guide. Click on Welcome tab to access support documentation.	» Welcome to	the POP Admini	stration Cente	r (PAC)				
AC User Guide	If you require as	sistance please of	contact our custo	omer service and			iide.	
	AC User Guide							

Options for Administering Profiles:

- **1.** *Invite Candidate Feature*: Send an email invitation to a candidate. They will be able to take the assessment on any device with internet access.
- 2. Order Codes Feature: Order a code and have an applicant take the assessment in your office.



Options to Administering an Assessment – Sending an Invitation

he invitation will con lease ensure you co	e send a candidate an invitation to take an assessment tain a direct link to take an assessment omplete the candidate's email correctly!
lick here to ▶ <u>View F</u>	<u>²ending Invitations</u>
Assessment	Predictor Of Potential POP 7.0 V
Language	English V
Candidate's Name	
Candidate's Email	
CC this Email to	service@selfmgmt.com
Position	Edit Positions
Subject	Online Assessment Invitation for SMG
	You have been invited to complete an online assessment in order to help determine your suitability for this position.
Message	Click on the link below to take the assessment.
	Click on the link below to take the assessment.
Attachment	Browse No file selected.
	The link to take the assessment will appear after your message and will read Take Assessment

- Click on the INVITE CANDIDATE feature
- Select the assessment and the language for the candidate to complete
- Enter the candidate's name, email address and select the position if applicable.
- The authorized user is automatically cc'd in the invitation sent to the candidate. We recommend a sub-folder in your Outlook and retain copies of the emailed invitations.
- Content within the subject line and message box are automatically generated, the message can be customized upon request
- Optional to include attachment along with the invitation
- Click on **SEND INVITATION** to email the assessment to the candidate.



Options to Administering an Assessment – Candidate Invitation Email

	2 * =	Online Ass	essment Invitation - Message (HTML			• •
e Message H	elp ADOBE PDF 🗘 Tell me wh	at you want to do				
gnore 🗙 📰 unk* Delete Archive	Reply Reply Forward More -	Inbox ♀ To Man Team Email ♀ Done ♀ Create New	ager 🥍 Shanan Marshall - G Reply & Delete 🚽	Move	Mark Categorize Follow	Find
Delete	Respond	Quick :	Steps ra	Move	Tags (Editing
have been invited t e Assessment ou cannot open the ps://www.selfmgmt	ssment Invitation to complete an online assessment in above link, copy and paste the text .com/pac/assessment/?function=ca	below into your internet browser. c&accesscode=FRLW7BJAY151&	testtype=POP7&Position=Manage		w to complete the questio	nnaire.

The candidate receives the invitation, they click on the link embedded in the email to complete the assessment. Once complete the link will expire. User with the "E" enabled in your account will receive an email once the candidate has completed the assessment.



Options to Administering an Assessment – Order Codes

		POP Adr	ninistration Center	(PAC)
e Assessment Orde	er Codes View Codes	View Reports	Invite Candidate	Candidate Tracke
» Order Access Cod	es			
	otain codes viewed under the "View C or leave this field blank if		be used for differen	t assessments

- Enter the desired number of codes required and the assessment
- Select the account receiving codes
- Click on **CONTINUE** to obtain code(s)

This option is used for those candidates that are asked to complete the assessment in your office or remotely. Upon placing an order, your code(s) will appear on a new screen. You can copy the codes to an excel spreadsheet or print them out. One unique code is to be provided to each candidate completing the assessment. You can also refer to the codes ordered under the "View Codes" tab. Assessments can be completed through the **TAKE ASSESSMENT** tab where you will enter the assessment and it's code; or at https://www.selfmgmt.com/assessment-evaluation-center/.

Assessment Predictor Of Potential POP 7.0 V
Access Code Data Entry Method Mouse
Continue



View Codes

		r	POP Admi	inistration Ce	nter (PAC)			Suppo	rt User's Gu
Asse	ssment Order Codes	View Codes	View Reports	Invite Candida	ate	Candidate Trac	ker Statistical Reports	Account Management		
Viev	/ Codes									
SortB Date			Assessment Form		Get Li	sting				
wing 1	- 10 of 10 First Prev	vious Next	Last							
						-				
No.	Account	User	Code	Date		Assessment	Candidate	Email	Resend	Delete
No. 1	Account ABC Company - Master		Code DOLHCLDQA3G3	Date 2019/10/17		Assessment POP7	Candidate	Email	Resend Edit	Delete Delete

This section allows you to view all the pending codes that have not been used.

Red Codes – Invitation issued to candidate *Black Codes* – Ordered Codes

Filter and review pending codes and invitations information by setting criteria displayed under this feature.

Once a code is used by a candidate to complete the assessment, the code is expired and automatically removed from this list. The candidate result can be viewed in the **CANDIDATE TRACKER** or **VIEW REPORT** tab.



View Reports

Assessment Orde	r Codes View Codes View Reports Invite Candida
View Reports	
v Sample Reports	
Assessment	Predictor Of Potential POP 7.0 ~
Account	All Accounts ~
User	
From Date	2020/04/01 v or yyyy/mm/dd
To Date	2020/04/30 v or yyyy/mm/dd
Sort By	Most Recent ~
Listing	Detailed ~
# Per Page	500 ~
Last Name Search:	
Email Search:	

Assessment Type:	Select the assessment type by clicking on the drop-down arrow.
Account:	Choose the account from where you wish to view the reporting activity.
Date Range:	The date defaults to the current month. Reset the date parameters by inputting a specific date or date range to retrieve historical data.
Listing Type:	Obtain detailed or brief candidate activity. Reports can be exported into CVS, excel format.
Sort by:	You can sort by; Candidate, Date, Most Recent, Status and ID. etc.
# Per Page:	Amount of records displayed. Choose from 25, 50, 100, 150 or 500 records per page.
Last Name Search:	Enter in a candidate's last name and retrieve only the records that match the last name.
Email Search:	Enter a candidate's email address to review matching records



View Reports – Listings

The following is a **DETAILED** list of candidates who have completed the assessment. To view a candidate's results including contact information, click a specific name.

			ninistration Cente			
e Assessment Order Codes	View Codes V	/iew Reports	Invite Candidate	Candidate Track	er Stat	istical Reports
Candidates who completed the second secon	he Predictor Of F	Potential POP	7.0 from 2020/04	/01 to 2020/04/30		
ewing 1 - 2 of 2 First Next	Previous Last	▶ <u>View Pendi</u>	ng Invitations			
No. Account	User	Date	Candidate	ID	Status	Position
1. ABC Company - Master	USERS GUIDE	2020/04/24	🗟 TEST, TEST	S672KSPMV5KY	Active	Manager
2. ABC Company - Master	USERS GUIDE	2020/04/24	🗟 TEST, TEST	DOLHCLDQA3G3	Active	
< Go Back						
	SELEA	MANAGEM	ENIT			
			GROUP	POP Administration	Center (PA	.C)
F LISTING:	Take Asse	essment Order (Codes View Codes	View Reports Invite Car	didate Ca	
						andidate Tracker
	» Can	didates who com	pleted the Predictor Of	Potential POP 7.0 from 20		
		didates who com				
	# Acc 1. ABC	:ount C Company - Maste	User As er USERS GUIDE	Potential POP 7.0 from 2		
	# Acc 1. ABC Total Nut	count C Company - Maste mber of Assessm	User As er USERS GUIDE	Potential POP 7.0 from 2		
	# Acc 1. ABC	count C Company - Maste mber of Assessm	User As er USERS GUIDE	Potential POP 7.0 from 2		
II Y LISTING.	# Acc 1. ABC Total Nui < Go B	count C Company - Maste mber of Assessm Back	User As er USERS GUIDE ents = 2	Potential POP 7.0 from 2		
ILY LISTING:	# Acc 1. ABC Total Nui < Go B	count C Company - Maste mber of Assessm Back	User As er USERS GUIDE ents = 2	Potential POP 7.0 from 2	020/04/01 to	. 2020/04/30
ILY LISTING:	# Acc 1. ABC Total Nui < Go B	count C Company - Maste mber of Assessm Back	User As er USERS GUIDE ents = 2	Potential POP 7.0 from 2 seessments 2 POP Administrat	020/04/01 to	2020/04/30
ILY LISTING:	# Acc 1. ABC Total Num < Go E SELFMA Take Assessing	count Company - Master mber of Assessm Back	User As er USERS GUIDE ents = 2 ENT Codes view Codes	Potential POP 7.0 from 2 seessments 2 POP Administrat	020/04/01 to tion Center Candidate	2020/04/30 r (PAC) Candidate Tra
ILY LISTING:	# Acc 1. ABC Total Nui < Go E	count Company - Master mber of Assessm Back	User As er USERS GUIDE ents = 2 ENT Note: Second	Potential POP 7.0 from 20 isessments 2 POP Administrat View Reports Invite 0	020/04/01 to tion Center Candidate	2020/04/30 r (PAC) Candidate Tra



Candidate Details

ke Assessment	Order Codes View Cod	des View Reports Ir	vite Candidate
» Candidate Det	ails		
Candidate Inform	ation	Reports / Tools	
ID: Test Date: Gender: Address: City: State/Province: Zip/Postal Code: Country: Telephone:	n/a n/a Manager	Manager's Report English Vietnamese Candidate's Report English Vietnamese Edit Candidate Transfer Candidate Copy and Paste Result Edit Interview Edit Notes	me

To view the full report, click on **MANAGER'S REPORT**; or click on **CANDIDATE'S REPORT** to obtain the candidate's feedback separately.

To edit a candidate's details, click on EDIT CANDIDATE.

The **TRANSFER CANDIDATE** feature is only available at the Master Account level. This function allows you to transfer a candidate's assessment to a different regional of sub account by assigning the record to another authorized user.

An electronic copy of the candidate's resume can be uploaded and attached to their record using the **COPY AND PASTE RESUME** feature.

EDIT INTERVIEW and **EDIT NOTES** allow the user to populate these forms with specific information to collect or track about the individual candidate.

Candidate Tracker

AGEME															English		
	ROUP	POP Adminis	tration	Center (PA	(C)						S	upport	User	s Guide	Welcon	ne	Log
Order Co	odes View Cod	les View Reports Inv	vite Can	didate C	andidate Trac	ker S	tatistical Rep	ports Ad	count Ma	nageme	ent						
racker																	
lucker																	
www/mr	m/dd Assessment	#/Page Position Filter				Accou	nt Filter										
		25 ~									~						
	m/dd Sort By	Status Filter					e Filter				_						
~		~		1961		-					~						
	Get Rec	cords		First P	viewin	g 1 - 2 o	f 2 Next	Last									
												Asses	sments	;			
te	Name	Email	Msg	Resume	Interview	Notes	Position	Source	Status	Perf	Invite	CMP	FSP	MPP3	POP7	PS	SI
20/04/24	ntest, test	service@selfmgmt.com	\square				Manager		0		Invite				View		
	TEST. TEST	service@selfmgmt.com							0		Invite				View		
20/04/24																	
	racker yyyy/mr yyyy/mr yyyy/mr	racker yyyy/mm/dd Assessment yyyy/mm/dd Sort By yyyy/mm/dd Sort By Get Rec te Name	racker yyyy/mm/dd Assessment #/Page Position Filter yyyyy/mm/dd Sort By Status Filter Get Records te Name Email	racker yyyy/mm/dd Assessment #/Page Position Filter yyyy/mm/dd Sort By Get Records te Name Email Msg	racker yyyy/mm/dd Assessment #/Page Position Filter yyyy/mm/dd Sort By Get Records First P te Name Email Msg Resume	racker yyyy/mm/dd Assessment #/Page Position Filter yyyy/mm/dd Sort By Get Records First Prev Viewin te Name Email Msg Resume Interview	racker yyyy/mm/dd Assessment #/Page Position Filter Yyyy/mm/dd Assessment #/Page Position Filter Yyyy/mm/dd Sort By Status Filter Get Records First Prev Viewing 1 - 2 of te Name Email Msg Resume Interview Notes	racker yyyy/mm/dd Assessment #/Page Position Filter Account Filter yyyy/mm/dd Assessment #/Page Position Filter Source Filter yyyy/mm/dd Sort By Status Filter Get Records First Prev Viewing 1 - 2 of 2 Next tet Name Email	racker yyyy/mm/dd Assessment #/Page Position Filter Account Filter yyyy/mm/dd Sort By Status Filter Status Filter Source Filter Get Records First Prev Viewing 1 - 2 of 2 Next Last	racker yyyy/mm/dd Assessment #/Page Position Filter 25 yyyy/mm/dd Sort By Status Filter Source Filter Get Records First Prev Viewing 1 - 2 of 2 Name Email Msg Resume Interview Notes Position Source Status Source Interview Notes Position Source Status Msg Resume Interview Notes Position Source Status	racker yyyy/mm/dd Assessment #/Page Position Filter Account Filter yyyy/mm/dd Assessment #/Page Position Filter Source Filter yyyy/mm/dd Sort By Status Filter Status Filter Source Filter Get Records First Prev Viewing 1 - 2 of 2 Next Last tet Name Email Msg Resume Interview Notes Position Source Status Perf	racker yyyy/mm/dd Assessment #/Page Position Filter Account Filter 25 25 yyyy/mm/dd Sort By Status Filter Source Filter Source Filter Get Records First Prev Viewing 1 - 2 of 2 Next Last tet Name Email Msg Resume Interview Notes Position Source Status Perf Invite	racker yyyy/mm/dd Assessment #/Page Position Filter Account Filter 25 Status Filter yyyy/mm/dd Sort By Status Filter Get Records First Prev Viewing 1 - 2 of 2 Name Email Msg Resume Interview Notes Position Source Status First Prev Viewing 1 - 2 of 2 Name Email	racker yyyy/mm/dd Assessment #/Page Position Filter Account Filter 25 Source Filter yyyy/mm/dd Sort By Status Filter Get Records First Prev Viewing 1 - 2 of 2 Next Last Assessments Msg Resume Interview Notes Position Source Status Perf Invite CMP FSP	racker yyyy/mm/dd Assessment #/Page Position Filter Account Filter 25 Source Filter yyyy/mm/dd Sort By Status Filter Status Filter Source Filter Get Records First Prev Viewing 1 - 2 of 2 Next Last Msg Resume Interview Notes Position Source Status Perf Invite CMP FSP MPP3	racker yyyy/mm/dd Assessment #/Page Position Filter 25 25 25 Source Filter yyyy/mm/dd Sort By Status Filter Source Filter Get Records First Prev Viewing 1 - 2 of 2 Name Email Msg Resume Interview Notes Position Source Status First Prev Viewing 1 - 2 of 2 Name Email	racker yyyy/mm/dd Assessment #/Page Position Filter Account Filter 25 Source Filter yyyy/mm/dd Sort By Status Filter Get Records First Prev Viewing 1 - 2 of 2 Mame Email Msg Resume Interview Notes Position Source Status Perf Invite CMP FSP MPP3 POP7 PS

The **CANDIDATE TRACKER** provides real time current analysis of all screening and assessment activity. Retrieve activity through various sorting filters, including date range, number of records, position, account, status etc.

Click on a candidate's name to access applicant's contact information. Maintaining the status for each candidate will help you identify and track at what stage the candidate is in the hiring process. It is also an effective sorting feature when reviewing records of hires or terminations.

Clicking on **VIEW** under the assessments will retrieve that candidate's report.



Candidate Tracker – Continued

Access to applicant information is displayed across the dashboard.

Email: Click on the **EMAIL** link to initiate an email communication to the candidate. MSG: Click on MSG and select from a list of boilerplate pre-set messages to email the candidate information on next steps. Templates are present under the Account Management function "Edit Messages" (created at the Master Account level). Click on **View** to access the resume for those candidates who attached one **Resume:** with their application. A copy can be populated to a candidate's folder by clicking on the candidate's name then copy and paste resume in the specific text box and save. Notes: Input notes or comments for a candidate. **Position:** The position is pre-determined when the invitation is sent by the recruiter. The position will be captured when the candidate completes the assessment. Source: Sourcing categories are displayed at the bottom of the dashboard. The source captured in the candidate's record is specified by the candidate when completing the assessment. Status: Populated and maintained by the recruiter. An effective sorting feature when used effectively. Statuses can be customized per client. Performance: The performance column can be customized with pre-set criteria or manually populated by a recruiter. Delete: Click delete to remove a candidate record from the tracking dashboard. Invite: Invite a candidate to take another assessment that may be necessary to complete the employment process. Assessment: Retrieve a candidate's report by clicking on View. If customized, the View button for screening results may appear in red, amber or green. This provides a quick visual of the overall recommendation, "Proceed", "Proceed with Caution" or "Redirect". Actions: This function allows you to select multiple candidate records at one time and updating their status or deleting their records. To select all records in view, click on Actions. View Columns: Dashboard customization functions, enable various columns you wish to include in your dashboard view.



Statistical Reports

	POP Administration Center (PAC	2)
Assessment Order Codes View Codes	iew Reports Invite Candidate Ca	ndidate Tracker Statistical Repor
Statistical Reports		
 Assessment Usage HospitalityScreen - Pass Rate x Source HospitalityScreen - Pass Rate x Location HospitalityScreen - Pass Rate x Location (csv) HospitalityScreen - Pass Rate x User HospitalityScreen - Pass Rate x User (csv) ManagementScreen - Pass Rate x Source (csv) ManagementScreen - Pass Rate x Source (csv) ManagementScreen - Pass Rate x Location (cond) ManagementScreen - Pass Rate x User (csv) POPScreen - Pass Rate x Source (csv) POPScreen - Pass Rate x Source (csv) POPScreen - Pass Rate x Location (csv) ServiceScreen - Pass Rate x User (csv) ServiceScreen - Pass Rate x Location (csv) Servic		

Automated standard statistical reporting package applicable to screening tools only.

Monitor and identify your most successful sourcing strategies, including pass rates by the following criteria: user, location, position etc.



Support and Training

If you require any additional help, please contact us at:

Phone:

1-416-746-0444

Email: info@selfmgmt.com

