

JobFit™ Assessment Centre

User's Guide (April, 2017)

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Glossary

Booklet Entry – the process of keying in the answers for an assessment that was completed via paper/pencil.

Candidate – the individual taking the assessment. Each Candidate must have a unique email address within the Account.

Completion Status – the values are Pending (assessment was scheduled but has not been started by the candidate), In Progress (candidate has started taking the assessment but has not clicked the Finish & Save button), Date (the actual date the assessment was completed by the candidate), Disabled (no longer active).

Credit – a token used to score one assessment. Each product has its own credit type.

Invitation From - the friendly name that will appear rather than their email address in the **From** field of a candidate's Inbox (e.g. Trina Woods vs. twoods@abc.com)

Job Pattern – a defined set of characteristics that typically equal success for certain job types. There are 116 Job Patterns that are grouped into 12 Job Categories. Job Patterns cannot be edited. (see page 18)

Optional Code – feature that enables the ability to group information for candidates, patterns, Scheduling Workflows, or Accounts. (see page 23)

Scheduling Workflow – a predefined set of actions for scheduling an assessment and actions to be taken once the assessment is completed. Scheduling Workflows are product specific. (see page 20)

Self-Registration – the process of inviting candidates to take an assessment in which they enter their own information. This eliminates the need to schedule each candidate individually. All Self Registrations are product specific and are created using a Scheduling Workflow. (see page 22)

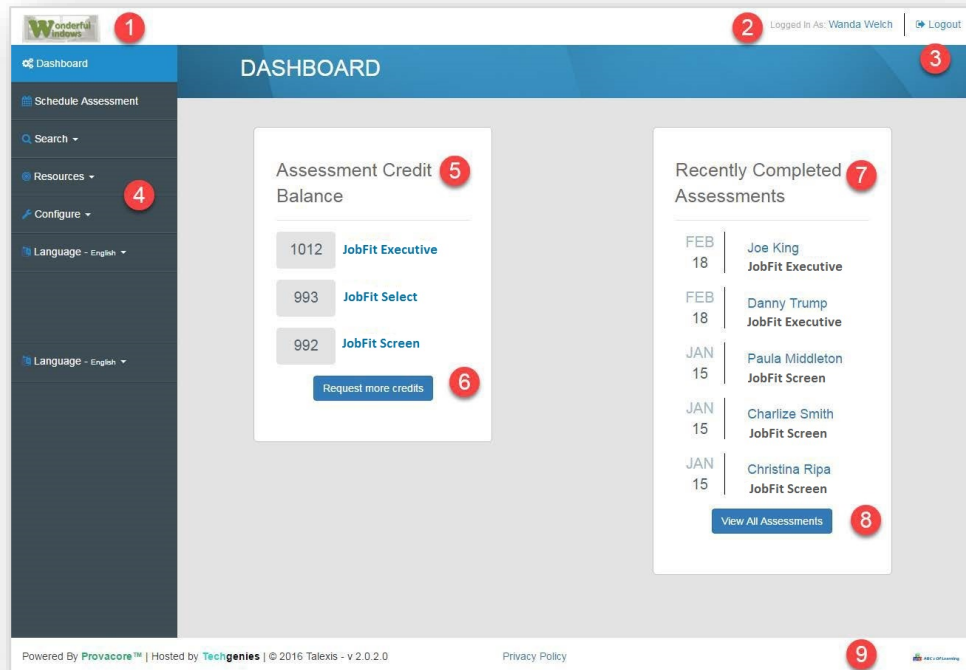
Success Pattern – custom patterns used only in the JobFit Executive. There are 3 ways to create a Success Pattern and they can be edited once created. (see page 12)

Texting Mobile – mobile phone number that is capable of receiving text messages.

User – individual with the ability to perform actions within an account. Each User must have a unique user email address within Assessment Centre.

Dashboard

The Dashboard provides a quick overview of the available credits and the most recently completed assessments.



1. Your company logo
2. User's name
3. **Logout** button
4. Left *Navigation Menu*
5. *Assessment Credit Balance* displays the current balance of credits for each available product.
6. **Request more credits** button sends an email to your account representative to contact you concerning additional credits.
7. *Recently Completed Assessments* lists the 5 most recently completed assessments. Selecting any candidate name will take you to the *Search Candidates* page with that candidate selected.
8. **View All Assessments** button takes you to the default *Search Candidate* screen.
9. Your representative's logo.

Schedule Assessment

This screen has several sections so we'll look at each section independently.

Method of Scheduling

Select whether you will schedule candidates by assessment or by using a Scheduling Workflow.

- The Scheduling Workflow must already be created.
- You can make this selection before or after you've created new candidates or selected existing candidates.
- When you are using a Scheduling Workflow any Optional Codes that you selected while creating new candidates will be overwritten with Optional Code values that were selected while creating the Scheduling Workflow.

Creating New Candidates

1. Create New Candidate is checked by default
2. Import Candidates will be covered in the next section.
3. Check this if you need to use Booklet Entry for this Candidate
 - a. When using Booklet Entry you can only create one candidate before you are redirected to the booklet entry pages.
 - b. You will still make the selections needed in the Actions section below or use a Scheduling Workflow.

4. You are required to enter an email address **OR** texting phone for the candidate.
 - a. This is where the invitation will be sent.
 - b. If you complete both fields the candidate will receive an email and text with the invitation.
5. Optional Codes that are Candidate Selectable will appear like this. When the box is checked, the Optional Code will appear when the candidate is required to select Salutation.
6. Required Optional Codes will have the red * next to them. Selections must be made before creating the candidate.

Import Candidates

Selecting *Import Candidates* changes the **New Candidates** window.

1. Select the *Choose File* button and locate and open the prepared file*.
2. Select the *Import Candidates* button.
3. The imported candidates will appear in the *Selected Candidate(s)* window.

* Creating a file with candidates:

In order to import candidates, you are required to create and upload a CSV file with candidates' details.

1. Create a spreadsheet with candidates' First Name, Last Name and Email Address. Please note that you can add up to 50 candidates. The first row is a header and should NOT be candidate information. (Please find and download the Import Candidate Template in JobFit Resource Centre <http://www.jobfitassessments.com/resources.php>)

1	FIRST NAME	LAST NAME	EMAIL
2	Mary	Sample	mary@gmail.com
3	Peter	Sample	peter@gmail.com
4	John	Sample	john@gmail.com
5	Kate	Sample	kate@gmail.com
6	Harry	Sample	harry@gmail.com
7	Susan	Sample	susan@gmail.com
8	Laura	Sample	laura@gmail.com
9	Thomas	Sample	thomas@gmail.com
10	Lucy	Sample	lucy@gmail.com

2. Save the file as .csv (comma delimited)

Selecting Existing Candidates

First Name	Last Name	Email	
Sarah	Sample	samplecandidate@provacore.com	+
Rosie	Aguilera	raguilera7656@somemail.com	+
Charlie	Kelly	charlie@paddys.com	+
Dennis	Reynolds	dennis@paddys.com	+
Mac	McDonald	mac@paddys.com	+
Frank	Reynolds	frank@paddys.com	+

1. Column headers – when clicked – sort the column on that value.
2. Scroll bar allows you to scroll through this list of candidates.
3. Navigate through the different pages of available candidates.
4. Click to add candidate to Selected Candidates area.

Selected Candidate(s) for Scheduling

First Name	Last Name	Email	Phone	Action
✓ Dennis	Reynolds	dennis@paddys.com		✘
✓ Charlie	Kelly	charlie@paddys.com		✘
✓ Rosie	Aguilera	raguilera7656@somemail.com	254-214-3941	✘

1. Selected Candidate(s) is the list of all the candidates created and selected.
2. Clicking the **X** in the Action column deletes them from the list.



Special Notes:

New Candidates deleted from the Selected Candidate(s) area will not be created in the system.

Actions to be Completed After Assessment Completion

⚡ Actions

(* Denotes required field)

1

Product

2

Language

Invitation From *

3

Send Reminder

In Days

4

Includes Professional Traits

On Assessment Completion Send

5

Text

6

Email

7

Attach Report

Report name *

Language

Success Pattern Name *

Minimum Percentage

Optional Report Addition

Sales Report

Leadership Report

11

Schedule

1. Select the product and language. Language will default to the user's selected language. This is the language in which the invitation will be sent.
2. This information will be seen in the candidate's Inbox as the **From** field. This field is auto filled with the user's company name.
3. Set reminder, when checked, will email a reminder to the candidate if the assessment has not been completed in the designated number of days.
4. Includes Professional Traits option will display when scheduling a JobFit Executive assessment. Please note that this option defaults to be on, if you unclick this button you will not be able to generate reports that include Professional Traits. If this button is not clicked, you CANNOT get this Professional Traits information for the candidate. We strongly advise that you collect the Professional Traits information because this will provide additional insight into an individual's approach to the workplace. (For more details about Professional Traits, please review Appendix A - page 29).

On Assessment Completion Send – these selections are optional.

5. Text – a brief text will be sent to this number letting the receiver know the candidate name and assessment that has been completed.
6. Email – this field is auto filled with the user’s email address. This can be edited. Multiple email addresses can be used per report generation when separated by a semi-colon (;).
7. Selecting Attach Report will display the list of available reports for this product for one candidate.
Only one report can be selected. (for multiple reports, create a Scheduling Workflow)
8. A pattern will need to be selected when required for a report to be generated. Success Pattern selection will be required when the selected report requires one.
9. Minimum Percentage is the percentage of Job Match that the candidate must achieve before an email will be sent upon completion.
10. Sales and Leadership options will display when available. Please note that the Leadership button defaults to on, if you unclick this button then after the candidate completes their assessment you CANNOT get this Leadership information. We strongly advise that you collect the Leadership information and if you do not want to display in the final report then unselect it when you generate the report.
11. The top of the screen will provide a success/failure notification.

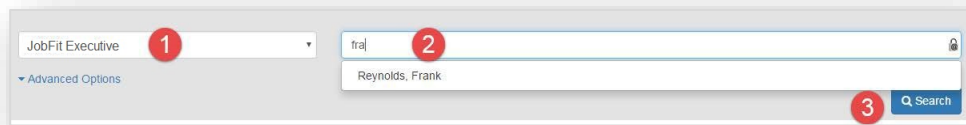
✔ success: Assessment created successfully for:
dennis@paddys.com, charlie@paddys.com
✖ error: Assessment creation failed ! Error : duplicate
assessment for: raguilera7656@somemail.com

Search Candidates

The screenshot shows the 'Search Candidates' interface. At the top, there is a 'Selected Candidates' section with buttons for 'Frank Reynolds' and 'Sarah Sample'. Below this are 'Schedule' and 'Reporting' buttons. A dropdown menu is set to 'JOBFIT EXECUTIVE' with a search input field. A 'Search' button is on the right. Below the search area, a table displays candidate information. The table has columns for 'Action', 'First Name', 'Last Name', 'Email', 'Status', and 'Score'. The first two rows are highlighted in pink, indicating they are selected. The table is sorted by 'Score' in descending order. A pagination bar at the bottom shows page 1 of 2.

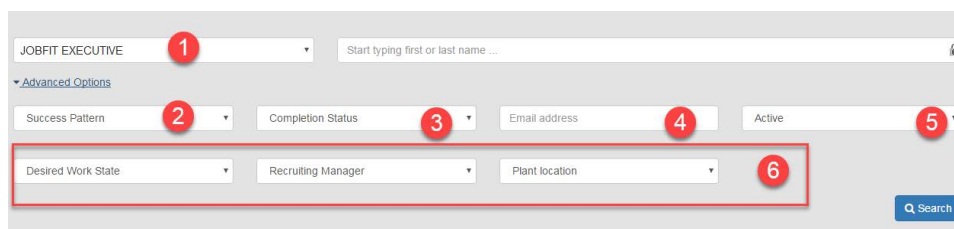
Action	First Name	Last Name	Email	Status	Score
<input checked="" type="checkbox"/>	Sarah	Sample	samplecandidate@provacore.com	12/30/2015	89
<input type="checkbox"/>	Rosie	Aguilera	raguilera7656@somemail.com	In Progress	(not set)
<input type="checkbox"/>	McDonald		mac@paddys.com	01/06/2016	98
<input checked="" type="checkbox"/>	Frank	Reynolds	frank@paddys.com	01/06/2016	100
<input type="checkbox"/>	Heidi	Blanchett	heidib@hotmail.com	01/07/2016	77
<input type="checkbox"/>	Sally	Newberg	sallynewberg@gmails.com	05/12/2016	60
<input type="checkbox"/>	Samuel	Newberg	samnewberg@gmails.com	05/12/2016	62
<input type="checkbox"/>	Michael	Morris	talexistester01@gmail.com	In Progress	(not set)
<input type="checkbox"/>	Trina	Woods	trinaw@abclearning.com	In Progress	(not set)

1. Select product
2. **Search** button
3. Columns are sorted by clicking column header
4. Action icons allow you to view a Summary report after scoring or view candidate information .
5. Selected candidates will be highlighted in the grid and moved to the top of the page.
6. Selected candidates will appear here. To remove them from the selection, simply click the **X**.
7. Select **Schedule** to schedule the selected candidates for a different assessment. Select **Reporting** to generate reports on the selected candidates.



Candidate focused Search

1. Select the appropriate product
2. Begin typing any part of the candidate's name in the next field. A list of all the candidates containing the typed letters will drop down.
3. Click on any one of these and click the **Search** button.



Advanced Search

1. Product name that candidates are assigned to.
2. List of active Success Patterns.
3. Completion Status
 - a. Pending – candidate has been scheduled and has not started the assessment.
 - b. In Progress – candidate has started taking the assessment, but has not completed.
 - c. Date – candidate finished the assessment on this date.
 - d. Disabled – assessment is no longer active
4. Email address allows you to enter a partial email (i.e. @gmail.com).
5. Active or Inactive – status of the candidate
6. Optional Codes that are available for the candidate. The three that are shown here are examples only.

View Candidate Information

AL FRISCO

First Name	Al
Last Name	Frisco
Salutation	Mr. 1
Email	alfrisco34543@mymail.com
Texting Mobile	
Language	English
Status	Active
Entry Key	c8e4d5dc 2
Entry Url	https://provasite.com/assessment/screening?candidateHash=c8e4d5dc 3
Team	
Owner	ABCs of Learning
Hired	
Terminate	

4 Edit
 5 Inactivate
 6 View JobFit Executive Assessment
 6 View JobFit Screen Assessment
 6 View JobFit Select Assessment

History 7

Activity	Date
Call Center - Inbound Compared	2016-02-17 21:26:45
JobFit Select Assessment created	2016-01-22 22:43:52
JobFit Screen Assessment created	2016-01-22 17:13:02
Generic Sample Compared	2016-01-22 14:53:23
JobFit Executive Assessment created	2016-01-21 21:15:42

1. General candidate information
2. *Entry Key* is the key that will let the candidate enter their assessment site when they go to Assessment Centre.
3. *Entry URL* is the direct link to the candidate's site to complete their assessment.
4. **Edit** button allows you to edit the candidate information.
5. **Inactivate** removes the candidate from your general view. Once Inactivated, they can be Activated from this same page.
6. **View Assessment** allows you to view the specific answers to a completed assessment.
7. *History* displays the dates of assessments scheduled and completed.

Candidate Reporting

1. Search for and select the candidates for reporting.
2. Click the **Reporting** button. This will transfer the selected candidates to the Candidate Reporting screen.
3. Select one or more reports to generate for the candidate(s).
4. Select a Success Pattern to be used for all the candidate(s) and report(s).
5. Make the remaining selections as desired.



Special Notes:

- No more than 25 candidates can be selected at one time.
- You can deselect any candidate by unchecking the box next to their name.
- Emailing reports
 - Having more than one candidate or report selected will require the reports to be emailed.
 - Multiple email addresses can be used per report generation when separated by a semi-colon (;).
 - The default email address can be changed.
- Report specifics
 - **Team Matrix** report needs 3 – 25 candidates to generate this report. You will select the *Team Leader* and enter a *Team Name*.
 - **Candidate Matching** report needs 3 – 25 candidates selected. These will be compared to one Success Pattern.
 - **Job Fit** report can have only 1 candidate selected to generate the JobFit report. You will need to select 2 – 20 Success Patterns to which the candidates will be compared.
 - **Talent Comparison** report needs 3 – 12 candidates selected. These will be compared to one Success Pattern.

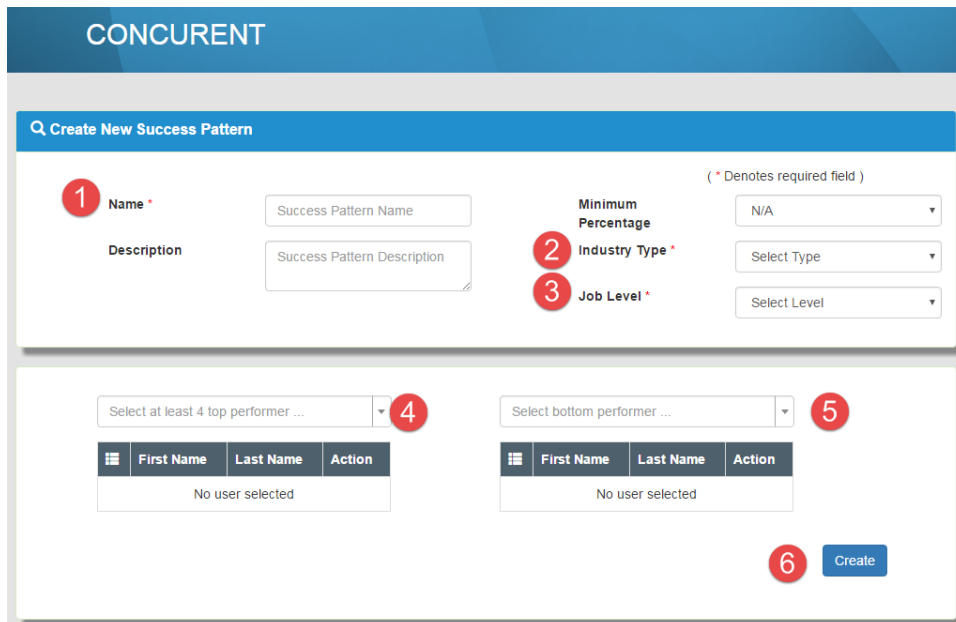
Success Patterns

Success Patterns are custom patterns used only in the JobFit Executive. There are 3 ways to create a Success Pattern. They can be edited once created. To create a new Success Pattern, click the **New** button on the Success Pattern screen and select the method type – Concurrent, Combination, or Job Pattern.

Creating Success Patterns

Concurrent Method

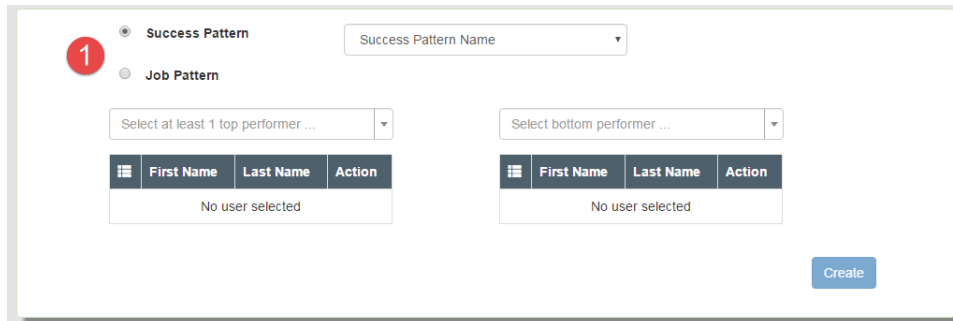
The concurrent method is the recommended process for creating Success Patterns. This method compares and combines the scores of four or more of your current top performers – individuals who embody success in a given position.



1. Success Pattern name. This should be a unique descriptive name.
2. Industry Type is a required field and the information is used for research.
3. Job Level is a required field and the information is used for research.
4. Select a *minimum of 4 top performers* from the drop down list. Once a candidate is added to the list they can be removed by clicking the **X** next to their name.
5. Select bottom performers if desired. These are not required to create a Success Pattern.
6. **Create** generates and saves the Success Pattern.

Combination Method

This method is useful when you do not have 4 top performers. You can select 1 or more top performers and combine that information with an already existing Success Pattern or a Job Pattern.



1. Select Success Pattern or Job Pattern to combine with the top performer(s).

Selecting Success Patterns allows you to select from a drop down list of active Success Patterns. Select one or more top performers and click the **Create** button.

Job Pattern allows you to select one or more top performers and click the **Create** button. The next screen will contain a list of Job Patterns.



Administration	Financial	Management	Sales & Marketing
Administrative Assistant Buyer Clerk Data Entry Clerk Executive Assistant Office Manager Receptionist Sales Support	Accountant Accounting Clerk Bank/Credit Union Loan Officer Bank/Credit Union Teller Bookkeeper Financial Planner	Director First-line Supervisor General Manager Manager Project Manager Sales Manager Senior Manager Team Leader	Account Executive Automobile Salesperson College Recruiter Inbound Salesperson Inside Salesperson Insurance Agent Marketing Manager Outside Salesperson Real Estate Agent Sales Representative
Communications	Healthcare	Production & MFG	Technical
Art Director Creative Design Professional Digital Communications (Blogger) Dispatcher Email Marketing Professional Journalist Marketing Analyst Online Content Manager Proof Reader Social Media Manager Technical Writer Training & Development Specialist	Dental Hygienist Dietician Home Health Worker Licensed Practical/Vocational Nurse Medical Assistant Medical Technologists Nurse Practitioner Nursing Aide/Orderly/Attendant Paramedic/Emergency Medical Technician Physical Therapist Physician Assistant Registered Nurse Veterinary Technician	Assembly Line Worker Custodian/Janitor Inventory Control Specialist Logistician Maintenance Worker Production or Order Expeditor Safety Technician Shipping & Receiving Warehouse Worker	Architect Audio/Video Technician Computer Support Specialist Electronic Tech Engineer Engineering Technician IT Professional Lab Technician Quality Control Technician Software Developer Telecommunications Specialists Web Developer
Customer Services	Hospitality	Professional Services	Trades
Account Manager Call Center - Inbound Cashier Customer Service Representative	Food Service Worker Hotel/Resort Desk Clerk Recreation/Fitness Worker Receptionist/Event Host/Hostess	Cosmetologist Driver HR Specialist Inspector Law Enforcement Officer Paralegal	Automotive Technician Carpenter Construction Worker

Job Pattern Method

If a position is new or there are not enough individuals to use the Concurrent method, starting with a predefined Job Pattern is an alternative method for creating a Success Pattern. You can only create 25 Success Patterns using this method.

1. Click the **Begin** button and complete the basic Success Pattern information.
2. Select a Job Pattern from the Job Pattern page.
3. The Job Pattern Details page will give you the information about the Job Pattern and will list the default behaviours that this job requires. It is recommended that you

Use default job pattern.

- a. If you feel that the default behaviours are not reflective of the position for which you are creating the Success Pattern, click **Edit job pattern description** to make changes.
- b. Make the desired changes and click the **Save** button.

View Success Pattern Details

Selecting the **View** icon from the Success Pattern search screen will allow you to look at the details of the Success Pattern.

DETAILS & GRAPH

Name: Front Line Manager **Date Created:** 02/25/2016
Description: Position manages 50 - 100 people. Can work long hours throughout the week and must have good interpersonal skills. **Minimum Percent Match:** 75%
Creation Method: Combination

3 Performers Edit Back

2

Scale	1	2	3	4	5	6	7	8	9
Reasoning Ability			2		2				
Manageability		1	1	2					
Competitiveness		1	1	2					
People Contact		1	3						
Sense of Urgency		1	2		1				
Attitude		1	2		1				
Take Charge		2	1	1					

1. All the information about the Success Pattern is listed in this area.
2. The Success Pattern scales and their ranges or show here.
3. The **Performers** button allows you to see the candidates that were used to create the Success Pattern (when available). It will appear like this:

Graph Edit Back

Top Performers:
Showing 1-4 of 4 items.

First Name	Last Name	Job Match Percent
Charlie	Kelly	89%
Frank	Reynolds	78%
Pete	Eckhart	82%
Rodney	Ruxin	92%

Editing Success Patterns

DETAILS & GRAPH

Save
Cancel
1

Name: Front Line Manager

Description:

Creation Method: Combination

Date Created: 2016-02-25 21:45:34

Minimum Percent Match:

2

Reasoning Ability	<input type="text" value="1"/> <input type="text" value="2"/> <input checked="" type="text" value="3"/> <input checked="" type="text" value="4"/> <input checked="" type="text" value="5"/> <input checked="" type="text" value="6"/> <input type="text" value="7"/> <input type="text" value="8"/> <input type="text" value="9"/>
Manageability	<input type="text" value="1"/> <input checked="" type="text" value="2"/> <input checked="" type="text" value="3"/> <input checked="" type="text" value="4"/> <input checked="" type="text" value="5"/> <input type="text" value="6"/> <input type="text" value="7"/> <input type="text" value="8"/> <input type="text" value="9"/>
Competitiveness	<input type="text" value="1"/> <input type="text" value="2"/> <input checked="" type="text" value="3"/> <input checked="" type="text" value="4"/> <input checked="" type="text" value="5"/> <input checked="" type="text" value="6"/> <input type="text" value="7"/> <input type="text" value="8"/> <input type="text" value="9"/>
3 People Contact	<input type="text" value="1"/> <input type="text" value="2"/> <input checked="" type="text" value="3"/> <input checked="" type="text" value="4"/> <input checked="" type="text" value="5"/> <input checked="" type="text" value="6"/> <input type="text" value="7"/> <input type="text" value="8"/> <input type="text" value="9"/>
Sense of Urgency	<input type="text" value="1"/> <input type="text" value="2"/> <input checked="" type="text" value="3"/> <input checked="" type="text" value="4"/> <input checked="" type="text" value="5"/> <input checked="" type="text" value="6"/> <input type="text" value="7"/> <input type="text" value="8"/> <input type="text" value="9"/>
Attitude	<input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input checked="" type="text" value="4"/> <input checked="" type="text" value="5"/> <input checked="" type="text" value="6"/> <input checked="" type="text" value="7"/> <input type="text" value="8"/> <input type="text" value="9"/>
Take Charge	<input type="text" value="1"/> <input type="text" value="2"/> <input checked="" type="text" value="3"/> <input checked="" type="text" value="4"/> <input checked="" type="text" value="5"/> <input checked="" type="text" value="6"/> <input type="text" value="7"/> <input type="text" value="8"/> <input type="text" value="9"/>

4
Reset

1. **Save & Cancel** buttons.
2. The *Description* and *Minimum Percent* are the only pieces of information that can be edited.
3. Select the desired scale numbers to change the Success Pattern range.
4. **Reset** returns the Success Pattern to the state before you started editing it.

Job Patterns

A Job Pattern is a defined set of characteristics that typically equal success for certain job types. JobFit Select only uses Job Patterns.

JOB PATTERN

<p style="text-align: center; color: #0070c0; font-weight: bold;">Administration</p> <ul style="list-style-type: none"> Administrative Assistant Buyer Clerk Data Entry Clerk Executive Assistant Office Manager Receptionist Sales Support 	<p style="text-align: center; color: #0070c0; font-weight: bold;">Communications</p> <ul style="list-style-type: none"> Art Director Creative Design Professional Digital Communications (Blogger) Dispatcher Email Marketing Professional Journalist Marketing Analyst Online Content Manager Proof Reader Social Media Manager Technical Writer Training & Development Specialist 	<p style="text-align: center; color: #0070c0; font-weight: bold;">Customer Services</p> <ul style="list-style-type: none"> Account Manager Call Center - Inbound Cashier Customer Service Representative Flight Attendant Retail Sales Associate Service Advisor 	<p style="text-align: center; color: #0070c0; font-weight: bold;">Financial</p> <ul style="list-style-type: none"> Accountant Accounting Clerk Bank/Credit Union Loan Officer Bank/Credit Union Teller Bookkeeper Financial Planner
<p style="text-align: center; color: #0070c0; font-weight: bold;">Healthcare</p> <ul style="list-style-type: none"> Dental Hygienist Dietician Home Health Worker Licensed Practical/Vocational Nurse Medical Assistant Medical Technologists Nurse Practitioner Nursing Aide/Orderly/Attendant Paramedic/Emergency Medical Technician Physical Therapist Physician Assistant Registered Nurse Veterinary Technician 	<p style="text-align: center; color: #0070c0; font-weight: bold;">Hospitality</p> <ul style="list-style-type: none"> Food Service Worker Hotel/Resort Desk Clerk Recreation/Fitness Worker Restaurant Host/Hostess Server 	<p style="text-align: center; color: #0070c0; font-weight: bold;">Management</p> <ul style="list-style-type: none"> Director First-line Supervisor General Manager Manager Project Manager Sales Manager Senior Manager Team Leader 	<p style="text-align: center; color: #0070c0; font-weight: bold;">Production & MFG</p> <ul style="list-style-type: none"> Assembly Line Worker Custodian/Janitor Inventory Control Specialist Logistician Maintenance Worker Production or Order Expeditor Safety Technician Shipping & Receiving Warehouse Worker
<p style="text-align: center; color: #0070c0; font-weight: bold;">Professional Services</p> <ul style="list-style-type: none"> Cosmetologist Driver HR Specialist Inspector Law Enforcement Officer Paralegal Security Guard Surveyor 	<p style="text-align: center; color: #0070c0; font-weight: bold;">Sales & Marketing</p> <ul style="list-style-type: none"> Account Executive Automobile Salesperson College Recruiter Inbound Salesperson Inside Salesperson Insurance Agent Marketing Manager Outside Salesperson Real Estate Agent Sales Representative 	<p style="text-align: center; color: #0070c0; font-weight: bold;">Technical</p> <ul style="list-style-type: none"> Architect Audio/video Technician Computer Support Specialist Electronic Tech Engineer Engineering Technician IT Professional Lab Technician Quality Control Technician Software Developer Telecommunications Specialists Web Developer 	<p style="text-align: center; color: #0070c0; font-weight: bold;">Trades</p> <ul style="list-style-type: none"> Automotive Technician Carpenter Construction Worker Drafter Electrician Exterminator Florist Food Process Worker Heating, Air Conditioning & Refrigeration Mechanic Heavy Equipment Mechanic Heavy Equipment Operator Long Haul Truck Driver Machinist Mason Painter Photographer/Videographer Sheet Metal Workers Welder

Printing a Job Pattern Description

All Job Patterns have a Job Pattern Description (JPD). This description lists the 21 behaviours that define success for this job. The JPD can be printed out for reference by selecting the desired Job Pattern and clicking on the **Print JPD** button at the top of the page.

JOB PATTERN DESCRIPTION

Print JPD
←

Name: Art Director
Category: Communications

Pattern name for printed report: Edit

Description: Responsible for the creation and design of advertisements and print materials. Assists in interpreting client's vision for TV commercials, advertising, and photo shoots. Oversees entire process of advertisement design, including concept, creation, and production.

Custom Job Pattern Name for Reports

There may be times that your organisation uses a certain Job Pattern, but the actual position is referred to by a different name. You can assign a different Job Pattern name for report generation only. The only place the custom Job Pattern name will appear will be in the JobFit Select Selection and Management reports.

JOB PATTERN DESCRIPTION

Print JPD

Name: Administrative Assistant
Category: Administration

Pattern name for printed report:

Edit

Description: Perform routine clerical and administrative functions such as drafting correspondence, scheduling appointments, organizing and maintaining paper and electronic files, and providing information to callers.

This job requires...		Hardly Ever	Some Times	Almost Always
1	accepting others at face value.	1	2	3
2	following rules and policies to the letter.	1	2	3
3	the use of numbers and calculations to make decisions.	1	2	3
4	taking control of projects and being responsible for outcomes.	1	2	3
5	social interaction with others.	1	2	3
6	following working within organizational constraints.	1	2	3

To change the Job Pattern name for report generation:

1. Select the desired Job Pattern.
2. Click the **Edit** button.
3. Enter the custom Job Pattern name in the field.
4. Click the **Save** button.

Scheduling Workflows

Scheduling Workflows are a predefined set of actions for scheduling an assessment and actions to be taken once the assessment is completed. Scheduling Workflows are product specific.

Creating New

Click the **New** button on the Scheduling Workflow screen. The new window has several components.

This first section allows you to enter in the basic information. The **Name** is the only required field.

Product is the only required selection.

1. Select the product.
2. Depending on the chosen product, select a Success Pattern or Job Pattern (this field will not display for JobFit Screen.)
3. **Send Reminders** allows you to have an email reminder sent to the candidate in **1 - 30** days if the candidate has not started the assessment. Send Reminders will not work when the Scheduling Workflow is used in a Self-Registration.
4. **Invitation From** is the name that will appear in the **From** field of a candidate's Inbox.
5. **Optional Codes** will appear in this area.

On Assessment Completion Send:

Text:

Email:

Attach Report

Report

Selection
Management
Summary
Talent Insights
Test Report

Language

English

OPTIONAL REPORT ADDITIONS:

Sales
 Leadership

On Assessment Completion Send: area allows you to enter mobile phone, email, and report selection options.

- Only one mobile phone number.
- Multiple email addresses can be used when separated by a semi-colon (;).
- Multiple reports can be selected by holding "Ctrl" while selecting them.

Selecting JobFit report

On Assessment Completion Send:

Text:

Email:

Attach Report

Report

Individual
Individual Graph
Job Fit
Talent Overview
OC Summary

Success Pattern

Generic Sample
Front Line Manager
Team Leader
General Manager
General Manager

Language

English

As mentioned above, multiple reports can be selected to be emailed upon assessment completion. These reports will be based on the Success Pattern selected in the Actions section.

When JobFit is selected as one of the reports an additional Success Pattern window will appear. The Success Pattern that was selected for all the other reports will be highlighted by default. A total of 2 – 20 Success Patterns must be selected in this window.

Self-Registrations

Self-Registrations allow you to invite candidates to take an assessment without the need to schedule each candidate individually. Any person can follow the link, enter the required information, and complete the assessment.

Self-Registrations are a convenient way to include assessments into the screening process. The instructions can be emailed to large groups of people, posted on a local kiosk, included in a job advertisement, listed on job boards, etc.

All Self-Registrations are:

- product specific
- created using a Scheduling Workflow

The screenshot shows a form for creating a new self-registration. It includes the following fields and elements:

- 1**: Name (required field, indicated by an asterisk and a red circle with the number 1)
- 2**: Scheduling Workflow (required field, indicated by an asterisk and a red circle with the number 2)
- 3**: Description (indicated by a red circle with the number 3)
- 4**: Active Days (indicated by a red circle with the number 4)
- 5**: Email Instructions To (indicated by a red circle with the number 5)

At the bottom of the form are two buttons: "Create" (green) and "Back" (blue). A note in the top right corner states "(* Denotes required field)".

Creating a new Self-Registration:

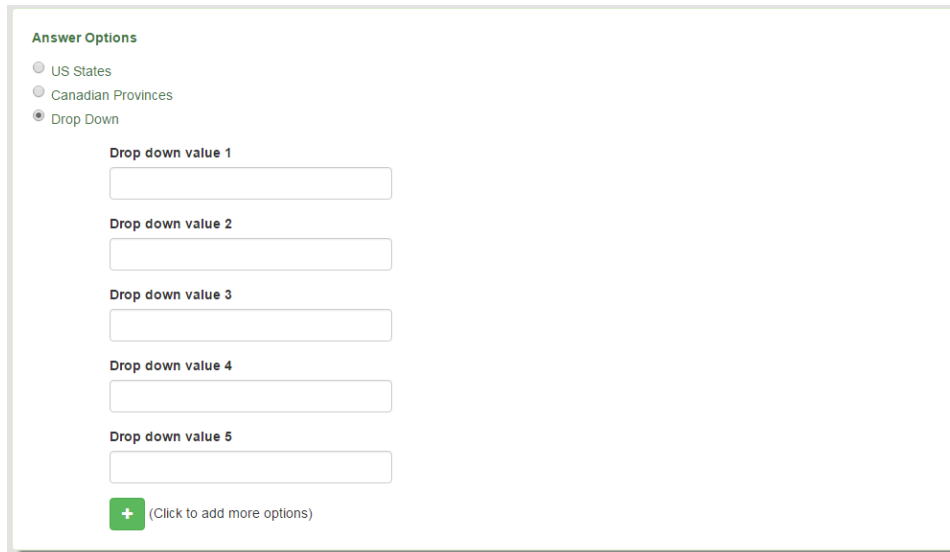
1. **Name** is required.
2. **Scheduling Workflow** is required. This will need to be configured before you begin creating the Self-Registration.
3. **Description** – added information to help identify the purpose of the Self-Registration.
4. **Active Days** – number of days a Self-Registration link will be active. This will default to Unlimited if no other number is entered.
5. **Email Instructions To** – is the address that the printed instructions will be emailed to. This is typically the person handling the posting or emailing of the invitation to the potential candidates.

Optional Codes

Optional Codes provide the ability to group information for Candidates, Patterns, Scheduling Workflows, or Accounts. Each entity has its own Optional Codes.

Optional Codes are simple drop down lists that allow the user or candidate to select values.

Candidate Optional Codes have two pre-filled answer options – US States and Canadian Provinces. The Optional Codes can be called anything (i.e. Preferred Location), the answer options are pre-filled for convenience.



Creating New Drop Down Optional Code

1. From the *Navigation Menu* select **Configure → Optional Codes**.
2. Select **New**.
3. Enter in the Optional Code Name and select **Drop Down** from the bottom half of the screen.
4. Enter in as many values as needed.
5. Click **Save**.



Special Notes:

- Once answer options are saved for the drop down, they cannot be deleted or changed.
- There is no limit to the number of Optional Codes that can be created per entity.
- There is no limit to the number of answer options per drop down.
- All answer options will appear in the order they were entered.

My Account

Your account information will enable you to view and edit vital information concerning your account.

The screenshot shows the 'My Account' page with the following sections and callouts:

- 1**: This information appears on printed reports (Company Name, Address One, Address Two, City, State, Postal Code, Date Format).
- 2**: Contact Information (First Name, Last Name, Email, Phone).
- 3**: Admin User (Showing 1-4 of 4 items, table with columns First Name, Last Name, Email).
- 4**: Enable Assessments (JobFit Executive, JobFit Select, JobFit Screen).
- 5**: User Permissions (Manage User, Website).
- 6**: Edit button.

First Name	Last Name	Email
Michael	Morris	talexistester01@gmail.com
Trina	Woods	trinaw@abclearning.com
Sarah	Bellum	nancy@talaxis.com
Al	Frisco	schroederc58@gmail.com

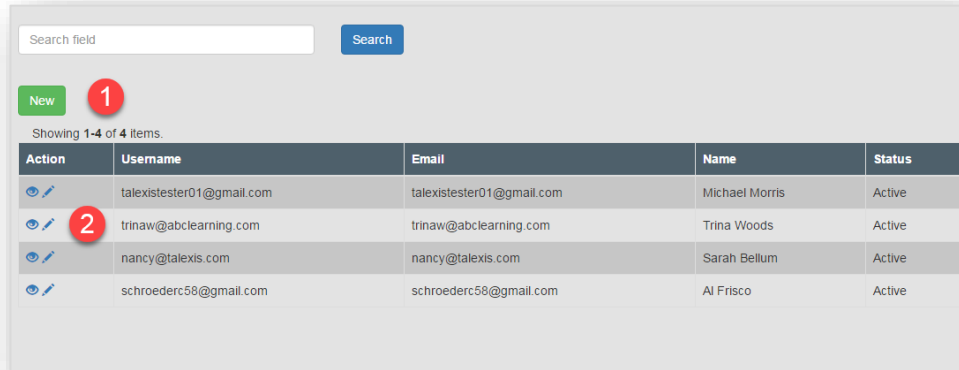
1. The information that appears in this section will be printed in the bottom right hand corner of all your report covers.
2. The Contact Information is typically the decision maker of the company. This person may or may not be the Admin User.
3. Admin User / User section displays all the active users for the account. To make changes to this area go to **Configure → Users**.
4. *Enable Assessments* displays the assessments that are available.
5. *User Permissions* consist of *Manage User*.
6. The **Edit** button is found in the lower right hand corner of the page.

Edit My Account

All sections of the account page can be edited except Users. The **Save** button will appear in the bottom right hand corner of the page.

Users

To view, add, or edit users for your account select **Configure → Users** from the *Navigation Menu*.



1. **New** button allows you to create a new user.
2. Action icons allow you to view or edit the user's information.

Adding New Users

Your account can have as many users as needed.

(* Denotes required field)

First Name *

Last Name *

Email *

Texting Mobile

Language

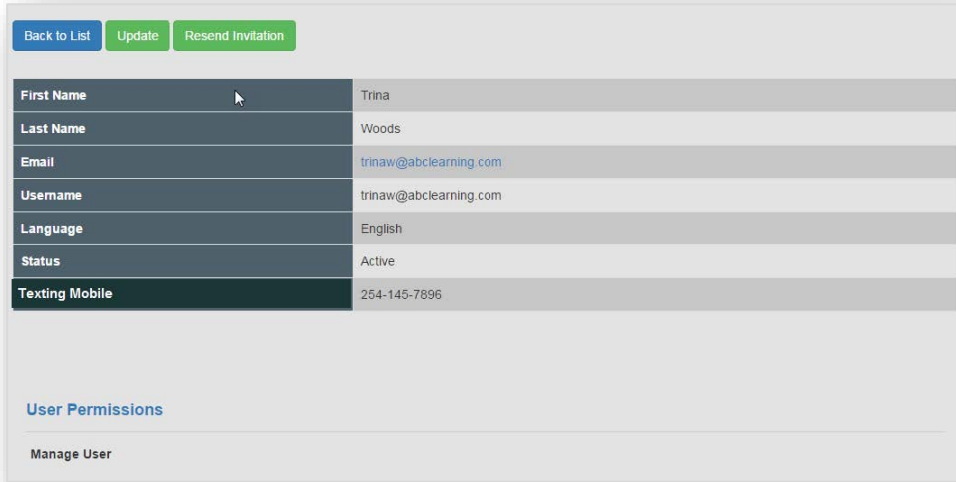
User Permissions

 Manage User

The User Permission of *Manager User* allows this particular user to add new users, inactivate existing users, and change the permissions of existing users.

Viewing and Editing User Information

All the information for a user can be edited by selecting the **Update** button.



Back to List Update Resend Invitation

First Name	Trina
Last Name	Woods
Email	trinaw@abclearning.com
Username	trinaw@abclearning.com
Language	English
Status	Active
Texting Mobile	254-145-7896

User Permissions

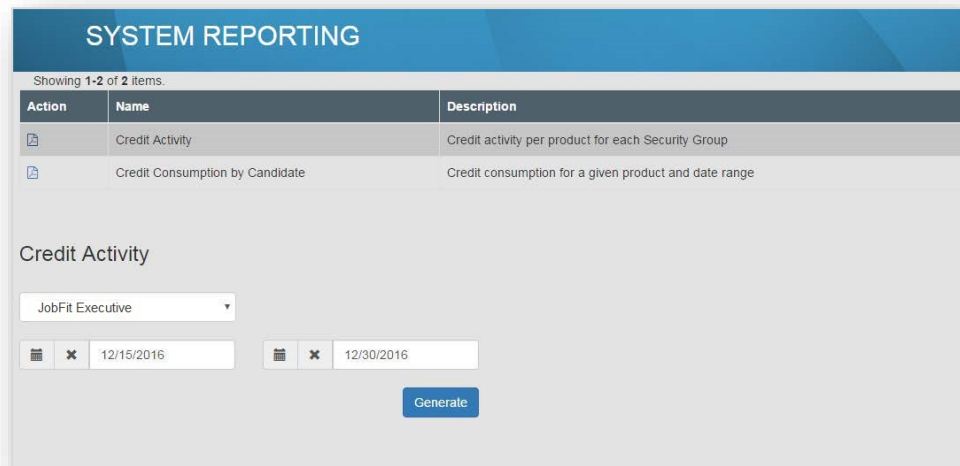
Manage User



Resending Invitation to New User

If a user did not receive their invitation to register for any reason, selecting the **Resend Invitation** button will resend the original invitation email.

System Reporting

The Assessment Centre provides reporting to allow you to track credit usage.



Action	Name	Description
	Credit Activity	Credit activity per product for each Security Group
	Credit Consumption by Candidate	Credit consumption for a given product and date range

Credit Activity

JobFit Executive

12/15/2016 12/30/2016

Generate

1. From the *Navigation Menu* select **Resource** → **Reporting**.
2. Select the desired report and the report details will appear at the bottom of the screen.
3. Select the desired product and date range and select the **Generate** button.