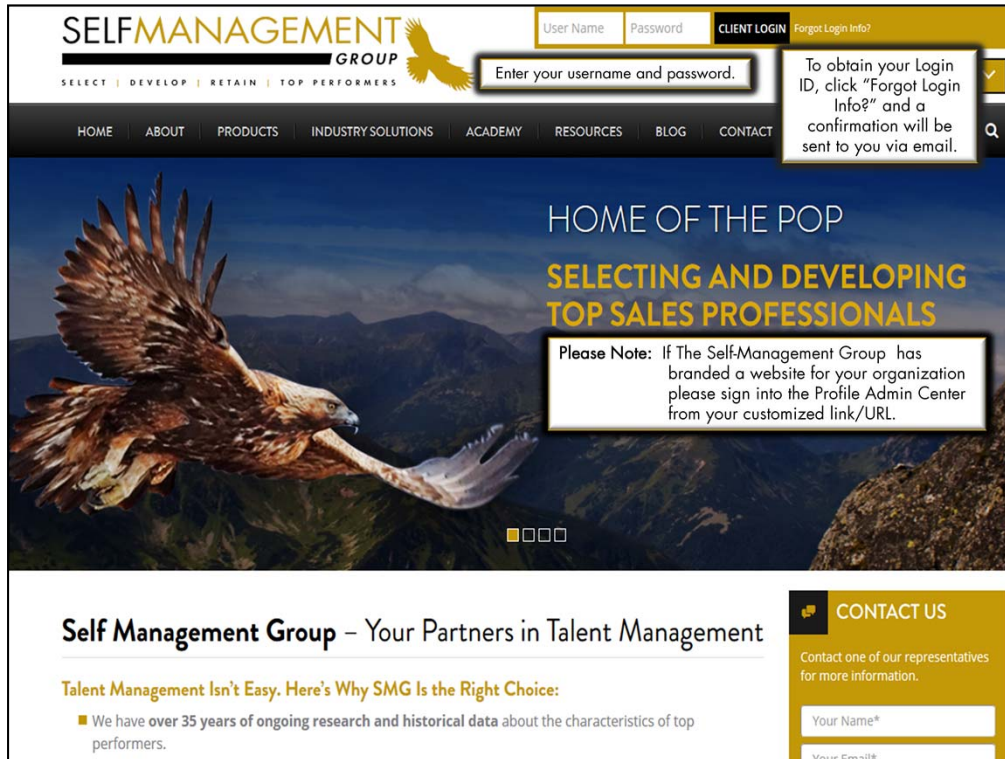


**PROFILE
 ADMINISTRATION
 CENTER:
*ONLINE TUTORIAL***

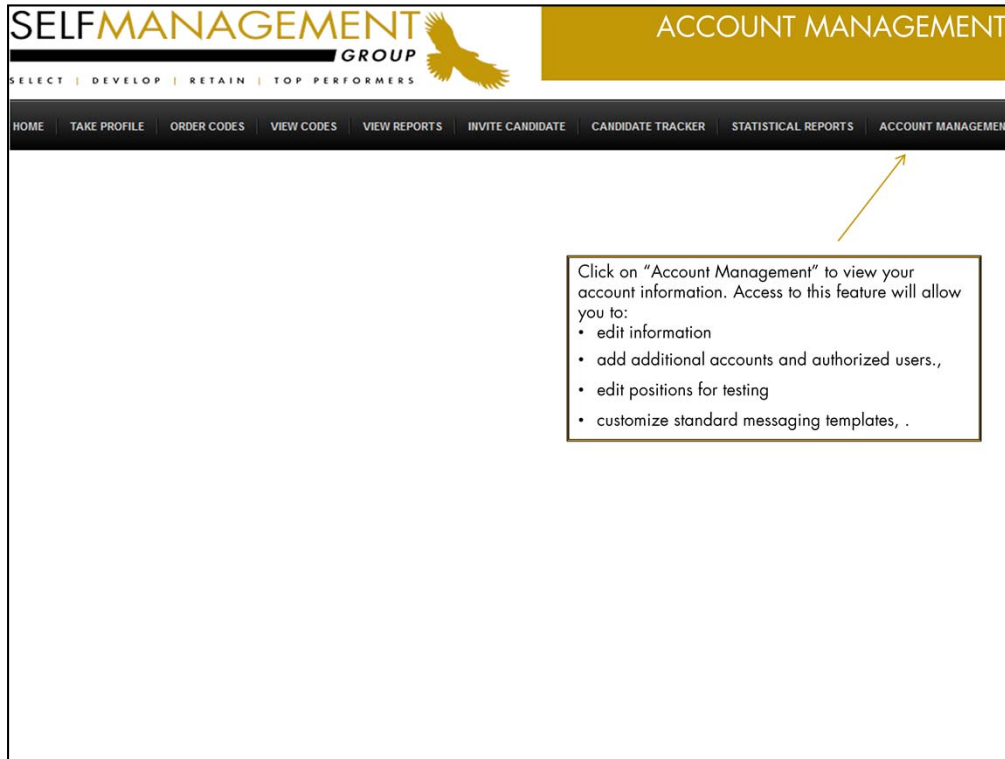


To access the PAC please direct your browser to the SMG Main Website located at www.selfmgmt.com.


Enter your Username and Password.

If a branded website has been created for your organization, login from the customized link/URL. Bookmark or add this website to your favorites for quick and easy access.

“Forgot Login Info?” Enter in your email address and your login information will be sent to you.



Administrators with access to the Account Management feature will have the ability to add users, change permissions of users and manage accounts, positions and messaging templates.

SELFMANAGEMENT GROUP  **FOUR LEVELS OF ACCESS**

SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Account Management

- Click on an account to edit
- Click here to [Add New Account](#)
- Click here to [Edit Positions](#)
- Click here to [Edit Messages](#)

Account Structure

- ▶ **abccompany** → **Master Account**
 - ↳ BC Regional Office
 - ↳ Vancouver sub account
 - ↳ Calgary Regional Office
 - ↳ Alberta sub account
- ↳ def → **Regional or Special account**
 - ↳ Regional - Ontario
 - ↳ Toronto
- ↳ Saskatchewan → **Sub Account or Branch**
 - ↳ saskatoon

Authorized users within an account can be restricted to limited information and account privileges. (4th Level)

Authorized users will see a diagram of the account structure which may be a subset of your organization's entire account.

Master Account: - Authorized head office users oversee all activity.

Regional or Special Accounts – Users view their activity and that of sub accounts within the same region.

Sub Account or Branch – Users view all activity within their sub-account including those profiles administered by other users within the same, but...

User with restricted access within an account – view only those assessments which they themselves have administered.

****Account information is maintained by those authorized with "Account Management" access.****

Need to make changes?

Click on the account of interest under the Account Structure. Here you may edit the account information such as changing the address, phone number, and contact information. The table to the right displays the authorized users within the specific account, their login ID, and permissions.

Add, edit, or delete users. A user can be granted a number of permissions which are noted by the letters **AOMVE**;

A=Active;

O=Order Codes;

M=Manage Account;

V=View others' activity;

E=Email notification of profiles completed.

SELFMANAGEMENT GROUP
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

ADDING A NEW USER

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Add New User

Name

UserName

Password

Telephone (include ext.)

Email Address

Account Active

Order Codes

Manage Account

View Others' Activity

Email Notification of Completed Profiles

Notes

Save Information

[Go Back](#)

Users with all features enabled will have full account access and ability to manage users and view all completed activity.

4th level of access To restrict a users access within an account, check off "Account Active", "Order Codes" and "Email Notification of completed profiles" (AOE) The user will have access to only those profiles which they themselves have administered.

Enter the new administrator's name. Create a unique username and password that consists of 6 alpha/numeric characters. Enter a telephone number and email address.

Enable permissions that you would like the user to have. Omit "Manage Account" and "View Others Activity" if you wish to limit the users access to viewing only their own activity.

SELFMANAGEMENT GROUP

SELECT | DEVELOP | RETAIN | TOP PERFORMERS

ADD NEW ACCOUNT

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Account Management

- Click on an account to edit
- Click here to [Add New Account](#)
- Click here to [Edit Positions](#)
- Click here to [Edit Messages](#)

Click "Add New Account" to build your account structure and additional levels of access within your organizations

Account Structure

- ▶ **abccompany**
 - ↳ **BC Regional Office**
 - ↳ Vancouver sub account
 - ↳ **Calgary Regional Office**
 - ↳ Alberta sub account
 - ↳ **def**
 - ↳ **Regional - Ontario**
 - ↳ Toronto
 - ↳ **Saskatchewan**
 - ↳ saskatoon

Click on "Add New Account" to create additional levels of access within your organization.

The Home office or 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 when adding new subaccounts within their region.

SELFMANAGEMENT GROUP
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

TYPES OF ACCOUNTS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Account Management

New Account Information

Type of Account: Special Account (Regional Office)
 Sub Account (Branch/Agency)

Parent Account: [Dropdown]

Address: [Text]

City: [Text] State/Province/Territory: [Text]

Zip/Postal Code: [Text] Country: [Text]

Contact: [Text] Title: [Text]

Telephone: [Text] Fax: [Text]

E-Mail Address: [Text] Extra: [Text]

Options

Active Order Codes Cand Feedback Add Resume
 Opinions Page Remove Sales Mgmt

UserName: [Text] Password: [Text]

Save Account

◀ Go Back

1. Special/Regional Account
 Next highest level of access. Parent Company would be the Head office account.

2. Sub Account (Branch/Agency) – Lower level of access. Regional account then becomes the parent account for a Sub-Account.

There are two types of accounts:

1. Special/Regional Account:
2. Sub-Account (Branch/Agency)

SELFMANAGEMENT GROUP  **ADD NEW POSITION**

SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

[Edit Positions](#)

▶ Add New Position

#	Account	Position	Profile	Language	Auto-Reply	Function	Active
1		COGPS	CMPC		Yes	Edit Delete	<input checked="" type="checkbox"/>
2		Management Position	MPP3			Edit Delete	<input checked="" type="checkbox"/>
3		Manager	ARM			Edit Delete	<input checked="" type="checkbox"/>
4		Sales	POP6			Edit Delete	<input type="checkbox"/>
5		Service/Administration	CCP			Edit Delete	<input type="checkbox"/>
6		Team Leader	MPP3			Edit Delete	<input checked="" type="checkbox"/>
7	EI TEST account 1	technology	EI			Edit Delete	<input checked="" type="checkbox"/>
8	EI TEST ACCOUNT 2	administration	EI			Edit Delete	<input checked="" type="checkbox"/>
9	Applicants - Reception	Receptionist	CCP			Edit Delete	<input checked="" type="checkbox"/>

[Update](#)

* If Account, Profile or Language is blank then the position applies to all in the blank column.

◀ Go Back

Within the "Account Management" feature you have the ability to "Edit Positions". Positions can be tied to a specific assessment and account(s). Sorting or filtering by position will be feasible when exporting candidate records within the Candidate Tracker.

SELFMANAGEMENT GROUP
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

MESSAGES

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

[Edit Messages](#)

Your Messages

No.	Name	Subject	Message	Global	
1	Phone Interview	Phone Interview	Phone Interview	No	▶ Edit

▶ Add New Message

* Global means others in same account or below can view a message. You cannot edit a message if it comes from a higher level account.

“Edit Message” (Feature located under “Account Management” Tab)

Create boilerplate email templates. Simplify your process by developing standard email communications to candidates. Templates can be chosen from a drop-down menu within the Tracker when following up with a candidate.

Within the “Candidate Tracker” click on the “MSG” column to select the message you wish to send.

SELFMANAGEMENT GROUP  **OPTIONS FOR ADMINISTERING A PROFILE**

SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Welcome to the Profile Administrative Center (PAC)

- Click on a menu item to gain access to the functions of the Profile Administrative Center (PAC).
- If you require assistance in using this system please contact the person who referred you to this website or see the PAC User Guide.
- To view these instructions at anytime, click on Welcome.

Options for Administering Profiles:

1. Invite Candidate
2. Order Codes

1. Send an **email invitation** to a candidate, or...
2. Order a code and have an applicant take the assessment in your office.

SELFMANAGEMENT GROUP
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

SENDING AN INVITATION METHOD 1

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS **INVITE CANDIDATE** CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Invite Candidate to Take a Profile

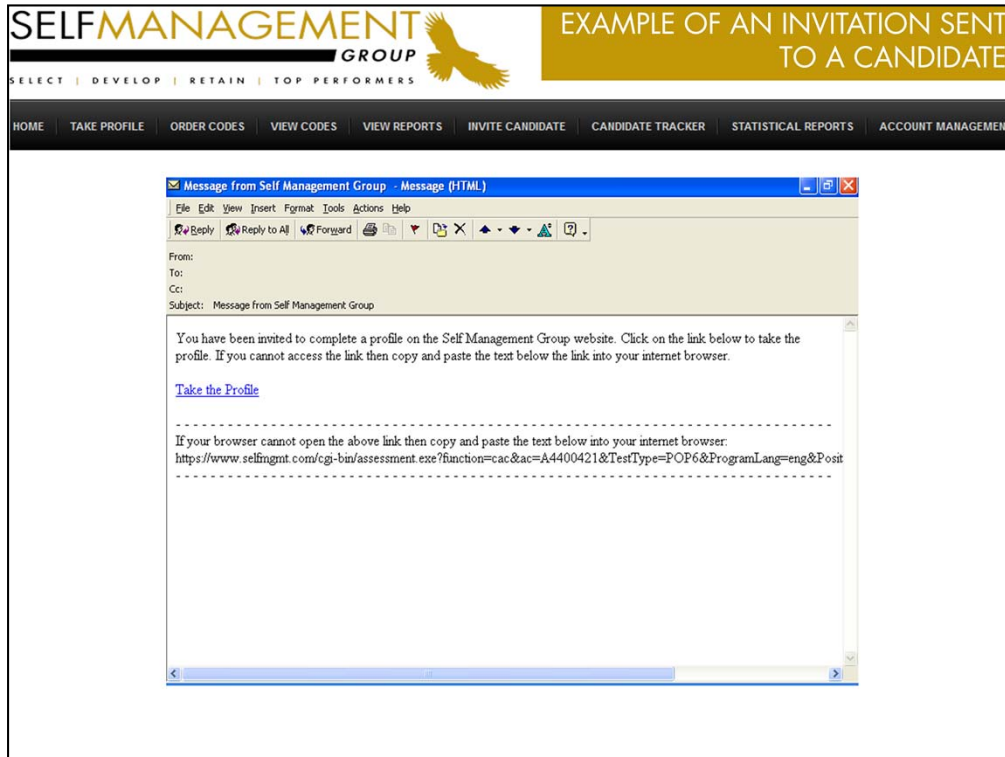
- Use this procedure to send a candidate an invitation to take a profile
- The invitation will contain a direct link to take a profile
- Please ensure you complete the candidate's email correctly!
- Click here to [View Pending Invitations](#)

Profile Type: [Dropdown]
 Language: English [Dropdown]
 Candidate's Name: [Text Field]
 Candidate's Email: [Text Field]
 Position: [Dropdown] [Edit Positions](#)
 CC this Email to: lchioran@selfmgmt.com [Authorized user is cc'd on the invitation sent to the candidate.](#)
 Subject: [Text Field]
 Message: [Text Area] [Option to personalize a message](#)
 Attachment: [Browse...](#) No file selected. [Optional: Include attachment along with your invitation](#)
The link to take the profile will appear after your message and will read [Take the Profile](#)
[Send Invitation](#) [Click on send invitation to execute](#)

[We recommend that you create a sub-folder in Outlook and retain copies of email invitations sent.](#)

- Click on the "Invite Candidate" feature
- Select the profile type that the candidate will be required to complete and choose the language.
- Enter the candidate's name, email address, and select position if applicable.
- Content within the subject line and message box can be customized per client upon request, otherwise a standard default message will be populated.
- Click "Send Invitation" to execute the action.

Administrators will automatically receive a copy of all invitations that are sent to candidates.



When the candidate receives the invitation, they need only to click on the link embedded in the email "Take the Profile" and they will immediately begin the questionnaire online.

SELFMANAGEMENT GROUP ORDER CODES METHOD 2
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Order Access Codes

- Enter the Number of Access Codes
- Click on Continue ONLY if you are sure
- Access Codes will be added to the Account you logged in under
- Select a Profile Type to make the Codes profile specific; otherwise the Access Codes you order can be used to take any profile type.

Number of Codes Specify quantity

Profile Type Choose the profile type

Account SMG - Home

Continue Click on continue to obtain and view codes

Codes ordered using this feature are provided to candidates who will be directed to a website address to complete a profile. There the candidate will be required to enter in the assigned code to complete the assessment online.

This option is for those candidates that are being asked to complete the profile in your office or remotely.

Codes can be ordered from the Profile Admin Center under “Access Codes”, by an authorized user.

Indicate the number of new codes you require, one code per candidate.

Choose the profile type and specify the account then click “Continue”.

SELFMANAGEMENT GROUP  **VIEWING YOUR ACCESS CODES**

SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Access Code Order Confirmation

Order Completed!


Here are your 2 Access Codes

2HRINWBBOG8P
RUMONLJUTKIT

Codes ordered remain in the "View Codes" folder for your reference up until the candidates complete the profile, then the code will be deleted.

One unique code to be provided to each candidate

Ordered codes will appear on your screen as shown above.
Print these codes or refer back to them by clicking on "View Codes"

SELFMANAGEMENT GROUP  **VIEW CODES**

SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

View Codes

SortBy: Date PerPage Filter: 25 Profile: All Codes

Viewing 1 - 15 of 15 First | Previous | Next | Last

No.	Account	User	Code	Date	<input type="checkbox"/>	Profile	Candidate	Email	Resend	Delete
1	abccompany	ADDNEW	209961366895	2012/03/21	<input type="checkbox"/>	PCP	Luiza	lptitioni@selfmgmt.com	Resend	Delete
2	abccompany	ADDNEW	209962320934	2012/03/21	<input type="checkbox"/>				Edit	Delete
3	abccompany	ADDNEW	209962320950	2012/03/21	<input type="checkbox"/>				Edit	Delete
4	abccompany	KCALDER	8KG0ERS3AN45	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
5	abccompany	KCALDER	3QG21MEVQ2W2	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
6	abccompany	KCALDER	NTFXBYFLPNY	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
7	abccompany	KCALDER	NSS44JVGHSLW	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
8	abccompany	KCALDER	7X1K0RRF717L	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
9	abccompany	KCALDER	EKYBJA7F41SP	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
10	abccompany	KCALDER	ODNOI2EC4GHX	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
11	abccompany	KCALDER	GB50XEYTYJ8	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
12	abccompany	KCALDER	P3033QCL4TFD	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
13	abccompany	KCALDER	FG53V6WG3GC	2014/08/19	<input type="checkbox"/>	POP7			Edit	Delete
14	abccompany	KCALDER	OVQ2YPLUVEOP	2014/08/26	<input type="checkbox"/>	POP7	Kris			
15	abccompany	KCALDER	VH4XE2H7WTDL	2014/10/10	<input type="checkbox"/>	360	Margaret (zahr)			

Examples "Order Codes"

Red Codes: Candidate has been emailed an invitation to take a profile. Thus invitation has been sent.

Here you will see a list of pending codes that have not yet been used.

Once a code is used by a candidate to complete a profile, the code is automatically removed from this list and the candidate record becomes part of the Candidate Tracker activity.

SELFMANAGEMENT GROUP TAKE A PROFILE
SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Take a Profile

- Select the Profile you wish to take.
- Make sure you select the correct Profile Type!
- Enter a valid, non-expired Access Code.
- **DO NOT allow candidates to take a profile from this link!**
- A candidate should complete the assessment by entering in the code provided to them from your branded website or from the Self Management Group website by clicking on "Take a Profile".

Profile Type: 360° Pro
Access Code:
Data Entry Method: Mouse
Continue

©2003-2014, Self Management Group

On rare occasions a candidate may need to complete a paper pencil copy of the survey. As the administrator you will be required to log in and enter their responses using a preordered access code from the menu.

If a candidate completes a paper/pencil version of the questionnaire – you as the administrator will order a code and then click on “Take a Profile”. The survey responses must be entered in manually.

Profile Type – Select the profile 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 as desired to retrieve historical data. You also have the ability to retrieve activity by a specific date or date range.

Sort by – Sort activity by: Candidate, Date, Most Recent, Status and ID.

Per Page – Amount of records displayed at one time per screen. Choose from 25, 50, 100, 150 or 500 records per page.

Last Name Search – Enter in a candidate’s last name and retrieve only those records that match the last name entered.

Click on Retrieve Listing.

SELFMANAGEMENT GROUP  **VIEW REPORTS**




SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Candidates who completed the CareerManagementPro from 2010/01/01 to 2015/06/30

Viewing 1 - 2 of 2 | First | Next | Previous | Last | [View Pending Invitations](#)


No.	Account	User	Date	Candidate	ID	Status	Position
1.	abccompany		2014/08/19		QNM5RBMK35UU	Active	
2.	abccompany		2014/09/03		SBNVPUXDYEU4	Active	Manager

[Go Back](#)

To view a candidate's report and contact information, click on the name.

The following is a list of candidates who have completed the profile.

To view a candidate's results including contact information, click a specific name.

SELFMANAGEMENT GROUP  **CANDIDATE DETAILS**

SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Candidate Details

Candidate Information	Reports / Tools
Name: test test ID: 916725226962 Test Date: 2009/07/13 Gender: F Address: City: State/Province: Zip/Postal Code: Country: Telephone: Email: Resume: n/a Interview: n/a Notes: n/a Position: Status: Active	Manager's Report → English → Chinese(Sim) → Chinese(Tra) → Czech → Dutch → French → Greek → Korean → Polish → Slovak → Spanish(LatAm) → Spanish(Spain) → Russian → Indonesian Candidate's Report → English → Chinese(Sim) → Chinese(Tra) → Czech → Dutch → French → Greek → Korean → Polish → Slovak → Spanish(LatAm) → Spanish(Spain) → Russian → Indonesian → Edit Candidate → Transfer Candidate → Copy and Paste Resume → Edit Interview → Edit Notes

[View Reports](#)
[Access Candidate Feedback only](#)
 "Edit Candidate" Information seen on (left of screen)
 "Transfer Candidate" This feature allows you to transfer a candidate's profile into another account/users.
 Master Account function ONLY

Go Back

To view the full report click on Manager's Report or obtain the candidate's feedback separately.

To Edit Candidate's details, click on Edit Candidate

The Transfer Candidate feature is only available at a Master Account level. This feature allows you to transfer a candidate's profile to a different account and assigning the record to another authorized user.

If you obtain an electronic copy of the candidate's resume you will have the ability to copy and paste the information to their record.

Edit Interview and Edit Notes fields can be populated with specific information that you wish to collect or track.

SELFMANAGEMENT GROUP THE CANDIDATE TRACKER
 SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC) Dashboard view of Candidate Activity.

Candidate Tracker

From Date: 2010/01/01 To Date: 2015/06/30 Per Page: 25 Position Filter: Account Filter: Status Filter: Source Filter: Last Name Search: Get Records << First < Previous Viewing 1 - 9 of 9 Next > Last >>

Note sorting feature to narrow results.

Candidates													Profiles													Account						
No.	Date	Name	Email	Msg	Resume	Interview	Notes	Position	Source	Status	Perf	Delete	Invite	CC	SS2	CMP	MPP3	MPP5	GSP	POF7	SIM	SIMR	SIMT	SPRO	SS	SS2	ST	ST2	TPRO	Name	User	No.
<input type="checkbox"/>	1	2010/04/19	test, test							0		Delete	Invite																	abcompany	RAVLES	1
<input type="checkbox"/>	2	2014/01/28	test, test	Email	Msg					5		Delete	Invite																	abcompany	ADDNEW	2
<input type="checkbox"/>	3	2014/09/19	caid, iris	Email	Msg					0		Delete	Invite																	abcompany	KCALDER	3
<input type="checkbox"/>	4	2014/09/22	caid, iris					Manager		0		Delete	Invite																	abcompany	KCALDER	4
<input type="checkbox"/>	5	2014/09/22	caid, iris					Sales	2	0		Delete	Invite																	abcompany	KCALDER	5
<input type="checkbox"/>	6	2014/09/03	caider, iratna	Email	Msg			Manager		0		Delete	Invite																	abcompany	KCALDER	6
<input type="checkbox"/>	7	2014/09/15	Caider, Kris					Manager		0		Delete	Invite																	abcompany	KCALDER	7
<input type="checkbox"/>	8	2014/09/18	caid, iris							0		Delete	Invite																	abcompany	KCALDER	8
<input type="checkbox"/>	9	2014/09/29	Caider, Kristina	Email	Msg					0		Delete	Invite																	abcompany	KCALDER	9

Actions: Status Delete View Columns << First < Previous Viewing 1 - 9 of 9 Next > Last >>

Source: 1*Newspaper or other print material; 2*Employee Referral; 3*Approached by Manager/Recruiter; 4*Job Fair; 5*Family, Friend, Acquaintance; 6*Direct Mail; 7*Electronic Media; 8*Job Board; 9*Corporate Website; 10*College Placement Office or Faculty Member; 11*Community Member; 12*Other
 Status: 1*Active; 2*Deactivated; 3*Hired/Contracted; 3*Holding; 4*Terminated; 5*Declined Offer

The Candidate Tracker provides an up to the minute analysis of all screening and profiling activity.

Retrieve the activity by various sorting features including Date Range, number of records, position, account, status etc.

Maintaining the status for each candidate will help you identify at which stage the candidate is in the hiring process. It will also become an effective sorting feature when reviewing hires, terminations etc.

Features include sorting by:

- Most Recent
- Name
- Position
- Performance
- User
- Date
- Source
- Status
- Account

SELFMANAGEMENT GROUP THE CANDIDATE TRACKER

SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC) Features Include: Candidate's personal details, screening and/or profile results, interview, resume, performance, source, status etc.

Candidate Tracker

From Date: 2010/01/01 Profile: Per Page: 25 Position Filter: Account Filter:
 To Date: 2015/06/30 Status Filter: Source Filter:
 Last Name Search: Get Records

No.	Date	Name	Email	Mag
1	2010/04/19	test, test		
2	2014/01/28	test, test		
3	2014/09/19	caid, iris		
4	2014/09/22	caid, iris		
5	2014/09/22	caid, iris		
6	2014/09/03	caider, kristina		
7	2014/09/15	Caider, Kris		
8	2014/09/18	caid, iris		
9	2014/09/29	Caider, Kristina		

Profiles

Invite	CC	SZ	CMP	MPP3	MPP5	GSP	POF7	SIM	SIMR	SIMT	SPRO	SS	SS2	ST	ST2	YPRO	Name	User	No.
Invite																	abcompany	RAVLES	1
Invite																	abcompany	ADDNEW	2
Invite	View																abcompany	KCALDER	3
Invite																	abcompany	KCALDER	4
Invite	View																abcompany	KCALDER	5
Invite	View																abcompany	KCALDER	6
Invite	View																abcompany	KCALDER	7
Invite																	abcompany	KCALDER	8
Invite																	abcompany	KCALDER	9

Viewing 1 - 9 of 9

1=Newspaper or other print material; 2=Employee Referral; 3=Approached by Manager/Recruiter; 4=Job Fair; 5=Family, Friend, Acquaintance; 6=Direct Mail; 7=Electronic Media; 8=Job Board; 9=Corporate Website; 10=College Placement Office or Faculty Member; 11=Community Member; 12=Other

Click on a candidate's name to access personal contact information.
 Click on "View" anywhere it appears on the dashboard to obtain details.
 Update details such as position, source, status and performance.
 Add and upload a resume, notes from an interview etc.

Candidate Details

ID = A7902474

First Name: Cheryl
 Last Name: C
 Address:
 City:
 State/Province:
 Zip/Postal Code:
 Country:
 Telephone: 310-257-7765
 Email:
 Position:
 Source: 9=Corporate Website
 Status: Active
 Performance:
 Resume: [Copy and Paste Resume](#)
 Interview: [Edit Interview](#)
 Notes: [Edit Notes](#)

Save Changes

Profile Administrative Center (PAC)

Candidate Tracker

From Date: 2010/01/01 To Date: 2015/06/30 Per Page: 25

Position Filter: Status Filter: Source Filter:

Last Name Search: Get Records << First < Previous Viewing 1 - 9 of 9 Next > Last >>

No.	Date	Name	Email	Msg	Resume	Interview	Notes	Position	Source	Status	Perf	Delete	Invite	CC	SS2	CMP	MPP3	MPP5	GSP	POP7	SIM	SMR	SMT	SPRO	SS	SS2	ST	ST2	TPRO	Account Name	User	No.
1	2010/04/19	test, test								0		Delete	Invite																abcompany	RAVLES	1	
2	2014/01/28	test, test		Email	Msg					5		Delete	Invite																abcompany	ADDNEW	2	
3	2014/09/19	caid, iris		Email	Msg					0		Delete	Invite																abcompany	KCALDER	3	
4	2014/09/22	caid, iris						Manager		0		Delete	Invite																abcompany	KCALDER	4	
5	2014/09/22	caid, iris						Sales	2	0		Delete	Invite																abcompany	KCALDER	5	
6	2014/09/03	caider, iratna		Email	Msg			Manager		0		Delete	Invite																abcompany	KCALDER	6	
7	2014/09/15	Caider, Kris						Manager		0		Delete	Invite																abcompany	KCALDER	7	
8	2014/09/18	caid, iris								0		Delete	Invite																abcompany	KCALDER	8	
9	2014/09/29	Caider, Kristina		Email	Msg					0		Delete	Invite																abcompany	KCALDER	9	

Actions: Status Delete View Columns << First < Previous Viewing 1 - 9 of 9 Next > Last >>

Source: 1*Newspaper or other print material; 2*Employee Referral; 3*Approached by Manager/Recruiter; 4*Job Fair; 5*Family, Friend, Acquaintance; 6*Direct Mail; 7*Electronic Media; 8*Job Board; 9*Corporate Website; 10*College Placement Office or Faculty Member; 11*Community Member; 12*Other; 13*Active; 14*Deceased; 2*Hired/Contracted; 3*Holding; 4*Terminated; 5*Declined Offer

Access the “Candidate Tracker” to review applicant information. Details will be displayed across the dashboard.

Columns

Email: Click on the “EMAIL” link to initiate an email to the candidate.

MSG: Click on MSG and select from a list of boilerplate messages to email a candidate information on next steps. Templates are preset under the Account Management function “Edit Messages”.

Resume: Click on “View” to access the resume for those candidates who provided their resume during the screening process. For those who did not, a copy can be populated to this folder. Click on Candidate’s name then copy and paste resume in specific text box.

Notes: A place where free-form notes or comments for a particular candidate are entered by a recruiter.

Position: The position will be captured when the candidate completes the assessment. It may also be set in the survey by the administrator when sending a candidate the invitation.

Source: Sourcing categories are displayed at the bottom of the dashboard. The source indicated in the candidate’s record is that collected when completing the screen assessment.

Profile Administrative Center (PAC)

Candidate Tracker

From Date: 2010/01/01 To Date: 2015/06/30 Per Page: 25

Position Filter: Account Filter: Status Filter: Source Filter:

Last Name Search: Get Records << First < Previous Viewing 1 - 9 of 9 Next > Last >>

No.	Date	Name	Email	Map	Resume	Interview	Notes	Position	Source	Status	Perf	Delete	Invite	CC	SZ	CMP	MPP3	MPP5	GSP	POP7	SIM	SIMR	SMT	SPRO	SS	SS2	ST	ST2	TPRO	Account Name	User	No.
1	2010/04/19	test, test								0		Delete	Invite																abcompany	RAVLES	1	
2	2014/01/28	test, test	Email	Map						5		Delete	Invite																abcompany	ADDNEW	2	
3	2014/09/19	caid, iris	Email	Map						0		Delete	Invite																abcompany	KCALDER	3	
4	2014/09/22	caid, iris						Manager		0		Delete	Invite																abcompany	KCALDER	4	
5	2014/09/22	caid, iris						Sales	2	0		Delete	Invite																abcompany	KCALDER	5	
6	2014/09/03	caider, iratna	Email	Map				Manager		0		Delete	Invite																abcompany	KCALDER	6	
7	2014/09/15	Caider, Kris						Manager		0		Delete	Invite																abcompany	KCALDER	7	
8	2014/09/18	caid, iris								0		Delete	Invite																abcompany	KCALDER	8	
9	2014/09/29	Caider, Kristina	Email	Map						0		Delete	Invite																abcompany	KCALDER	9	

Actions: Status Delete View Columns

<< First < Previous Viewing 1 - 9 of 9 Next > Last >>

1=Newspaper or other print material; 2=Employee Referral; 3=Approached by Manager/Recruiter; 4=Job Fair; 5=Family, Friend, Acquaintance; 6=Direct Mail; 7=Electronic Media; 8=Job Board; 9=Corporate Website; 10=College Placement Office or Faculty Member; 11=Community Member; 12=Other; 13=Active; 14=Deceased; 2=Hired/Contracted; 3=Holding; 4=Terminated; 5=Declined Offer

Status: Populated and maintained by the recruiter. This feature becomes an effective sorting feature when used effectively. Statuses can be customized.

Performance: The performance column can be customized or manually populated by a recruiter.

Delete: Click on delete to remove a candidate record from the tracking system.

Invite: Click on this link to invite a candidate to complete another profile that may be necessary to the employment process.

Profiles: Retrieve a result or information on a candidate by clicking on "VIEW". The "View" link for screening results may appear in red, amber or green. This provides a quick visual of either a pass or fail result.

Actions: This multi-select feature allows you to select multiple candidate records at one time changing their status or deleting their files from the Candidate Tracker. To select all records in view click on "Actions".

View Columns: Dashboard customization feature for enabling various columns you wish to include in your view.

SELFMANAGEMENT GROUP STATISTICAL REPORTS

SELECT | DEVELOP | RETAIN | TOP PERFORMERS

HOME TAKE PROFILE ORDER CODES VIEW CODES VIEW REPORTS INVITE CANDIDATE CANDIDATE TRACKER STATISTICAL REPORTS ACCOUNT MANAGEMENT

Profile Administrative Center (PAC)

Statistical Reports

Automated statistical reporting applicable to screening tools only.

- ▶ Profile Usage
- ▶ ManagementScreen - Pass Rate x Source
- ▶ ManagementScreen - Pass Rate x Source (csv)
- ▶ ManagementScreen - Pass Rate x Location
- ▶ ManagementScreen - Pass Rate x Location (csv)
- ▶ ManagementScreen - Pass Rate x User
- ▶ ManagementScreen - Pass Rate x User (csv)
- ▶ ServiceScreen - Pass Rate x Source
- ▶ ServiceScreen - Pass Rate x Source (csv)
- ▶ ServiceScreen - Pass Rate x Location
- ▶ ServiceScreen - Pass Rate x Location (csv)
- ▶ ServiceScreen - Pass Rate x User
- ▶ ServiceScreen - Pass Rate x User (csv)
- ▶ ServiceScreen2 - Pass Rate x Source
- ▶ ServiceScreen2 - Pass Rate x Source (csv)
- ▶ ServiceScreen2 - Pass Rate x Location
- ▶ ServiceScreen2 - Pass Rate x Location (csv)
- ▶ ServiceScreen2 - Pass Rate x User
- ▶ ServiceScreen2 - Pass Rate x User (csv)
- ▶ StressPro - Group Report
- ▶ VitalityPro - Group Report

Monitor and identify your best sourcing strategies.

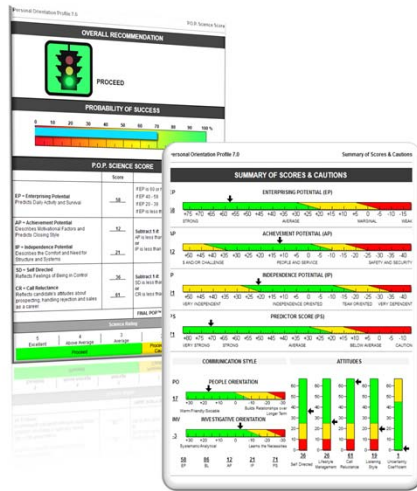
*** Utility for Screening Tools Only ***

Analysis for:

Pass Rate X Location

Pass Rate X Source

Pass Rate X User



For Support

Email:

service@selfmgmt.com

Or call:

416-746-0444

Toll Free at:

1-800-760-9066