



POP™ Administration Center (PAC)

Instruction Manual

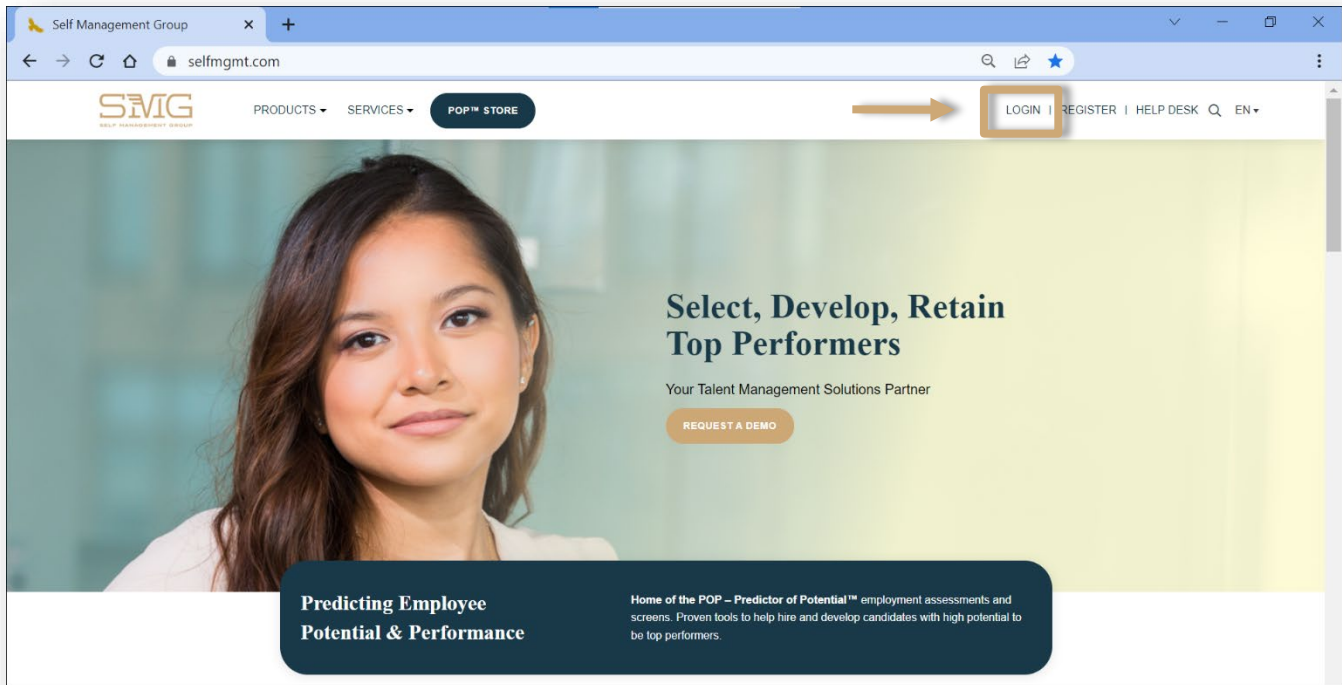


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Login to the PAC



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

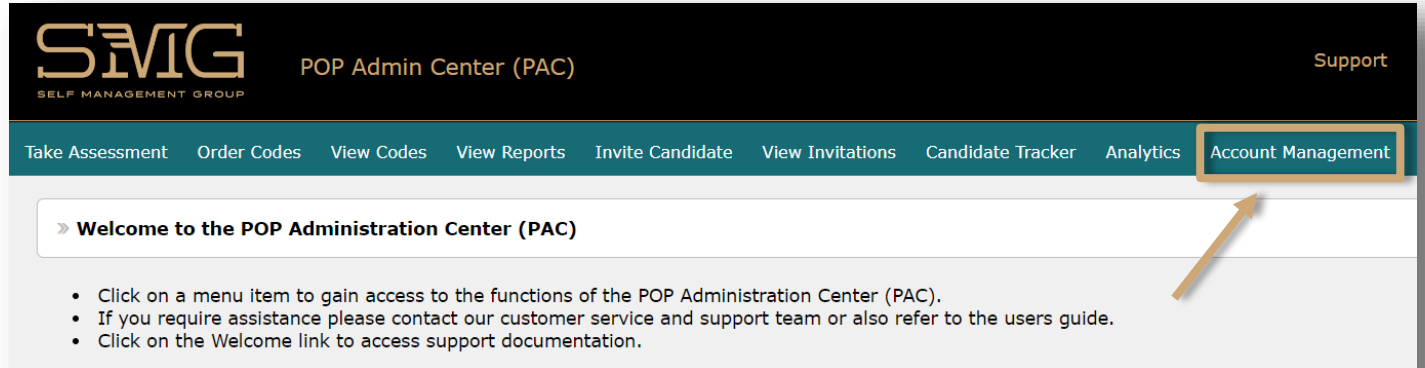
www.selfmgmt.com

Enter your Username and Password.

FORGOT LOGIN INFO? Enter your email address and your login information will be sent to you with a temporary password. You will be prompted to reset your password at first login attempt. Please ensure you are resetting the password to something that has not been used as of yet and that it is 6-8 characters long with at least one capital letter, lowercase letter, one number and one special character.



Account Management



Super Administrators (**AOMVE**) 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:

- Edit Company Contact Information
- Add Additional Accounts and Authorized Users
- Set and Modify Permissions for Users or Accounts
- Add and Edit Positions for Invitations



Account Management Levels of Access

SMIG
SELF MANAGEMENT GROUP

POP Admin Center (PAC)

Support User's Guide Welcome Log Out English

Take Assessment Order Codes View Codes View Reports Invite Candidate View Invitations Candidate Tracker Analytics **Account Management**

» **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

▶ **ABC Company - Master 23**

- ▶ **REGION 1**
 - ↳ District Name (Sub Account)
- ▶ **REGION 2**
 - ↳ District Name (Sub Account)
- ▶ **REGION 3**
 - ↳ District Name (sub Account)
- ▶ **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.

Account Access: Super Users are Master account users with Admin rights (**AOMVE**). If you would like users to view profiles administered by others, enable the “**V**” (**AOVE**). Users with restricted access (**AOE**), view only the assessments they have administered.



Account Management - Edit Account

POP Admin Center (PAC)
Support
User's Guide

Take Assessment
Order Codes
View Codes
View Reports
Invite Candidate
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Candidate Tracker
Analytics
Account Management

Account Management

Account Information

Type of Account
Special Account (Regional Office)

Parent Account
ABC Company - Master 23

Name

REGION 1

Address

City

State/Province/Territory

Zip/Postal Code

Country

Contact

Title

Telephone

Fax

E-Mail Address

Extra

Industry

SMG

or add new

Options

☒ Active
☒ Order Codes
☐ Cand Feedback
☐ Add Resume

☐ Opinions Page
☐ Sales Mgmt
Email Notify Language: Same as Assessment

Update Account

Delete this Account

Users

Action	Settings	Name	UserName	Telephone	Email
Login	AOMV	vancouver	SMVNCR		

= Delete User
 = EMail Intro Package
 = Edit User

A=Active | O=Order Codes | M=Manage Account | V=View Others | E=Email Notification

Add New User

Enable Desired Options

Go Back

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

- | | | | |
|-------|---|------------|-----------------------------------|
| Login | Allows you to login as the user. | Email | Email to reset a user's password. |
| Edits | Edits user's information and permissions. | Reinstates | Reinstates users' access |

NEED TO MAKE CHANGES?

In ACCOUNT MANAGEMENT click on a specific account to view existing details. Here you may edit the account information, change the address, phone number, email address and other information. The table to the right displays the authorized users within the 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 notifications of completed assessments (if the **V** is enabled then this user will be cc'd in all emailed Manager Reports).



Account Management – Adding a New User

The screenshot shows a web browser window with the URL `selfmgmt.com/cgi-bin/?function=AddUser&Client=ABCCOM&...`. The page is titled "Add New User" and contains a form with the following fields and options:

- Name
- UserName
- Password
- Telephone (include ext.)
- Email Address
- Account Active ☒
- Order Codes ☒
- Manage Account ☐
- View Others' Activity ☐
- Email Notification of Completed Assessments ☐
- Notes
- ☐ EMail Intro Package
- Save Information

Below the form, there is a "Users" table with the following columns: Action, Settings, Name, UserName, Telephone, Email. The table contains one user entry:

Action	Settings	Name	UserName	Telephone	Email
Login	AOMV	vancouver	SMVNCR		

Below the table, there is a legend: **A=Active | O=Order Codes | M=Manage Account | V=View Others | E=Email Notification**. A button labeled "Add New User" is highlighted with a red box.

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

Once in the **ACCOUNT MANAGEMENT** tab, click on **ADD NEW USER** to setting up the new recruiter. In the new window that appears, enter their name, a unique username and password. We recommend the password consists of 6-8 characters with at least one capital letter, one lowercase letter, one number and one special character. Enter a telephone number and then the user's email address. Checking off "Email Intro Package" will send the login package for the new user to create their password. Once the package has been sent a lock will appear next to the user's permissions. This is your indicator to whether the user can sign into their account or not.

*****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 the assessments they have administered. *****



Account Management – Add New Account

The screenshot shows the SMIG POP Admin Center (PAC) interface. The top navigation bar includes the SMIG logo, the title 'POP Admin Center (PAC)', and links for 'Support' and 'User'. Below this is a secondary navigation bar with links: 'Take Assessment', 'Order Codes', 'View Codes', 'View Reports', 'Invite Candidate', 'View Invitations', and 'Candidate Tracker'. The main content area is titled 'Account Management' and contains a list of actions: 'Click on an account to edit', 'Click here to **Add New Account**', 'Click here to Edit Positions', and 'Click here to Edit Messages'. The 'Add New Account' link is highlighted with a red box and an arrow. Below this is a section titled 'Account Structure' which displays a hierarchy for 'ABC Company - Master 23'. This hierarchy includes four regions: 'REGION 1', 'REGION 2', 'REGION 3', and 'REGION 4'. Each region has a sub-account listed as 'District Name (Sub Account)'.

Click **ADD NEW ACCOUNT** to add Regional and Sub Accounts. Build your account structure including authorized users within each level.

Super Administrators (**AOMVE**) reserve the right to create a hierarchy of regions and sub accounts within the organization.



Account Management – Types of Accounts

New Account Information

Type of Account

▼

Special Account (Regional Office)

Sub Account (Branch/Agency)

Parent Account

ABC Company - Master 23 ▼

Address

City

State/Province/Territory

Zip/Postal Code

Country

Contact

Title

Telephone

Fax

Email Address

Extra

Industry

--- select or add new --- ▼

or add new

Options

☒ Active

☒ Order Codes

☐ Cand Feedback

☐ Add Resume

☐ Opinions Page

☐ Sales Mgmt

Email Notify Language: Same as Assessment ▼

UserName

Password

Save Account

Aside from the Master account, there are two types of accounts:

- 1. Special/Regional Account**
Second highest level of access. Parent account would be the Head Office/Master account.
- 2. Sub Account (Branch/Agency)**
Lowest level of access. Regional account would be considered the parent account.



Account Management – Add New Position

The **EDIT POSITIONS** feature allows you to add and edit positions.

• Click here to [Edit Positions](#)

[Take Assessment](#) [Order Codes](#) [View Codes](#) [View Reports](#) [Invite Candidate](#) [View Invitations](#) [Candidate Tracker](#) [Analytics](#) [Account Management](#)

» **Edit Positions**

► Add New Position

#	Account	Position	Assessment	Language	Auto-Reply Message	Function		Active
1		Branch Manager	MPP3		No	Edit	Delete	☒
2		Domestic Helper			No	Edit	Delete	☒
3		Manager			No	Edit	Delete	☒
4		Sales Advisor			No	Edit	Delete	☒
5	REGION 1	Customer Service			No	Edit	Delete	☒
6	REGION 2	Customer Service Representative			No	Edit	Delete	☒
								Update

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

[Go Back](#)

Positions can be tied to specific assessments and accounts. Sorting or filtering by position will be available through exporting the **CANDIDATE TRACKER**.



Account Management – Messages

Take Assessment **Order Codes** **View Codes** **View Reports** **Invite Candidate** **View Invitations** **Candidate Tracker** **Analytics** **Account Management**

» **Edit Messages**

Your Messages

No.	Name	Subject	Message	Global	
1	Thank You	Thank You for Applying	Thank You	Yes	▶ 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.

Add New Message

Name

Subject

Message (text or html)

Make Global ☐

Save Message

Click here to ▶ [Edit Messages](#)

Standard Message templates to candidates 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.

Take Assessment **Order Codes** **View Codes** **View Reports** **Invite Candidate** **View Invitations** **Candidate Tracker** **Analytics** **Account Management**

» **Candidate Tracker**

From Date: 2020-01-01 To Date: 2022-08-31 Assessment: #/Page: 25 Position Filter: Account Filter: Status Filter: Source Filter: Last Name Search: Get Records First Prev Viewing 1 - 2 of 2

Candidates	#	Date	ID	Name	Email	Msg	Resume	Inter
☐	1	2020-04-24	S672KSPMVSKY	TEST, TEST	service@selfmgmt.com			
☐	2	2020-04-24	DOLHCLDQA3G3	TEST, TEST	service@selfmgmt.com			

Actions: Status Export View Columns

Source: 1=Newspaper or other print material; 2=Employee Referral; 3=Approached by Manager/Recruiter; 4=Job Fair; 5=Family, Friend, Acquaintance
Status: 0=Active; 1=Deselected; 2=Hired/Contracted; 3=Holding; 4=Terminated; 5=Declined Offer

Send a Message

Select Message:

To Address: service@selfmgmt.com

From Address: service@selfmgmt.com

CC: ☒

Subject:

Message Text:

Send Message



Options for Administering an Assessment

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POP Admin Center (PAC)

Support User's Guide Welcome Log Out

Take Assessment **Order Codes** View Codes View Reports **Invite Candidate** View Invitations Candidate Tracker Analytics Account Management

» **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 the Welcome link to access support documentation.

Options for Administering Profiles:

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



Options for Administering an Assessment – Sending an Invitation

ke Assessment Order Codes View Codes View Reports **Invite Candidate** View Invitations Candidate Tracker

» **Invite Candidate**

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

Assessment:

Language:

Position: [Edit Positions](#)

Candidate's Name:

Candidate's Email:

CC invitation to:

Subject:

Message:

You have been invited to participate in an online assessment to explore your fit for this opportunity. Please click on the link below and allow sufficient time to complete it in one sitting.

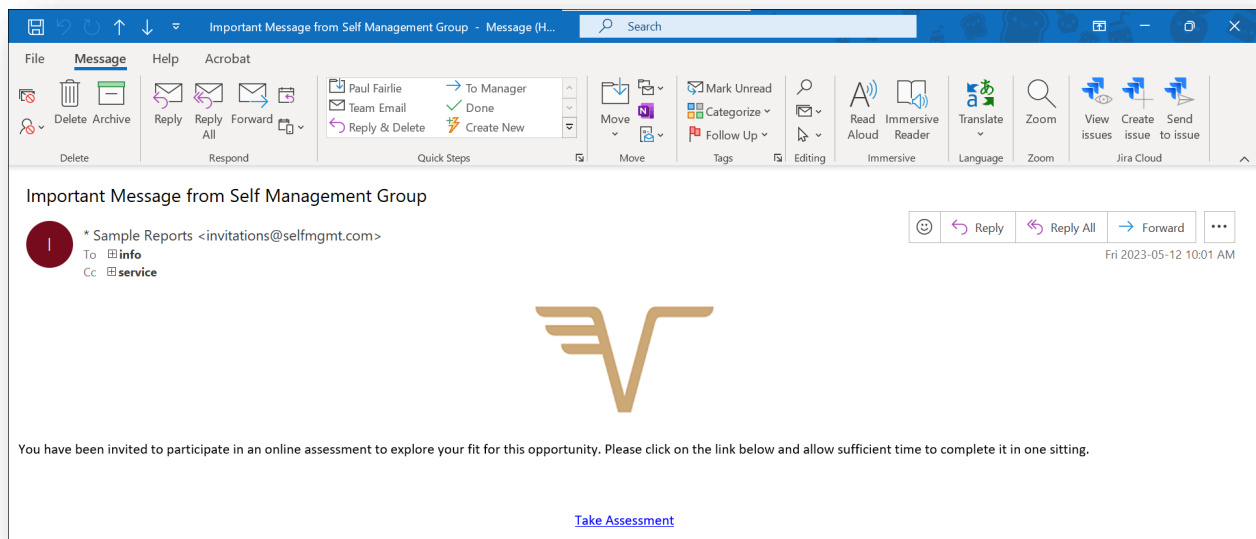
Attachment: No file chosen

A link to take the assessment will appear after your message

- Click on the **INVITE CANDIDATE** feature
- Select the assessment and the language and the position if applicable.
- Enter the candidate's name and email address.
- 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 send to the candidate.



Options for Administering an Assessment – Candidate Invitation Email



When the candidate receives the invitation, they click on the link embedded in the email to complete the assessment. Once they have saved their answers the link will expire so it cannot be used again. Users with the “E” enabled in the account will receive an email containing the Manager’s Report and separate Candidate Feedback Report if applicable.



Options for Administering an Assessment – Order Codes

The screenshot shows the 'POP Admin Center (PAC)' interface. The top navigation bar includes the 'SMIG' logo, 'SELF MANAGEMENT GROUP', and links for 'Support' and 'Us'. Below this is a teal navigation bar with tabs: 'Take Assessment', 'Order Codes' (highlighted), 'View Codes', 'View Reports', 'Invite Candidate', 'View Invitations', and 'Candidate Tracker'. The main content area is titled '» Order Codes' and contains a list of instructions: 'Enter the Number of Access Codes Required', 'Click on Continue to obtain codes', 'Ordered codes can be viewed under the "View Codes" tab', and 'Select the assessment or leave this field blank if the codes are to be used for different assessments'. Below the instructions is a form with three dropdown menus: 'Number of Codes', 'Assessment', and 'Account' (currently showing 'ABC Company - Master 23'). A 'Continue' button is at the bottom of the form.

- 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 the candidates that are asked to complete the assessment in your office. Upon placing an order, the 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/>.

The screenshot shows the '» Take Assessment' page. It features a form with three fields: 'Assessment' (dropdown menu showing 'Predictor Of Potential POP 7.0'), 'Access Code' (text input field), and 'Data Entry Method' (dropdown menu showing 'Mouse'). A 'Continue' button is located below the form. At the bottom of the page, the copyright notice '©2003-2020, Self Management Group' is displayed.



View Codes

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POP Admin Center (PAC)

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Take Assessment Order Codes **View Codes** View Reports Invite Candidate View Invitations Candidate Tracker Analytics Account Management

» View Codes

Assessment SortBy PerPage Format
[Dropdown] [Date] [25] [Onscreen] [Get Listing](#)

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

☐	#	Account	User	Code	Date	Assessment	Candidate	Email	Edit	Delete
☐	1	ABC Company - Master 23	TESTPAC	XBWYCFN1JLQI	2022-09-01	POP7				
☐	Actions: Delete									

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

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

The screenshot shows the 'View Reports' page in the SMIG POP Admin Center (PAC). The header includes the SMIG logo and the title 'POP Admin Center (PAC)'. A navigation bar contains links: 'Take Assessment', 'Order Codes', 'View Codes', 'View Reports' (highlighted with an orange box), and 'Invite Candidate'. Below the navigation bar, the page title '» View Reports' is displayed. The main content area contains several filter options: 'Assessment' (dropdown menu showing '360 POP'), 'Account' (dropdown menu showing 'All Accounts'), 'User' (dropdown menu), 'From Date' (dropdown menu showing '2022-09-01'), 'To Date' (dropdown menu showing '2022-09-30'), 'Sort By' (dropdown menu showing 'Date'), 'Listing' (dropdown menu showing 'Detailed'), and '# Per Page' (dropdown menu showing '25'). At the bottom of the filter section, there are two search fields: 'Last Name Search:' and 'Email Search:'. A 'Retrieve Listing' button is located at the bottom right of the filter section.

- 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.

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Take Assessment | Order Codes | View Codes | View Reports | Invite Candidate | View Invitations | Candidate Tracker | Analytics | Account Management

» Candidates who completed the Predictor Of Potential POP 7.0 from 2020-02-01 to 2022-09-30

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

No.	Account	User	Date	Candidate	ID	Status	Position
1.	ABC Company - Master 23	USERS GUIDE	2020/04/24	 TEST TEST	S672KSPMV5KY	Active	Manager
2.	ABC Company - Master 23	USERS GUIDE	2020/04/24	 TEST TEST	DOLHCLDQA3G3	Active	

BRIEF LISTING:

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Take Assessment | Order Codes | View Codes | View Reports | Invite Candidate | View Invitations | Candidate Tracker

» Candidates who completed the Predictor Of Potential POP 7.0 from 2020-02-01 to 2022-09-30

#	Account	User	Assessments
1.	ABC Company - Master 23	USERS GUIDE	2

Total Number of Assessments = 2

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ONLY LISTING:

 POP Admin Center (PAC) Support User's Guide Welcome Log Out

Take Assessment | Order Codes | View Codes | View Reports | Invite Candidate | View Invitations | Candidate Tracker

» Candidates who completed the Predictor Of Potential POP 7.0 from 2020-02-01 to 2022-09-30

Total Number of Assessments = 2

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Candidate Details

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» Candidate Details

Candidate Information	Reports / Tools
Name: TEST TEST	Manager's Report
ID: S672KSPMV5KY	↳ English
Test Date: 2020/04/24	↳ Chinese (Simplified)
Gender:	↳ Chinese (Traditional)
Address:	↳ Czech
City:	↳ Dutch
State/Province:	↳ French
Zip/Postal Code:	↳ German
Country:	↳ Greek
Telephone: 416-746-0444	↳ Indonesian
Email: service@selfmgmt.com	↳ Italian
Resume: n/a	↳ Khmer
Interview: n/a	↳ Korean
Notes: n/a	↳ Polish
Position: Manager	↳ Russian
Status: Active	↳ Slovak
	↳ Spanish (Spain)
	↳ Spanish (Latin America)
	↳ Thai
	↳ Vietnamese
	Candidate's Report
	↳ English
	↳ Chinese (Simplified)
	↳ Chinese (Traditional)
	↳ Czech
	↳ Dutch
	↳ French
	↳ German
	↳ Greek
	↳ Indonesian
	↳ Italian
	↳ Khmer
	↳ Korean
	↳ Polish
	↳ Russian
	↳ Slovak
	↳ Spanish (Spain)
	↳ Spanish (Latin America)
	↳ Thai
	↳ Vietnamese
	↳ Edit Candidate
	↳ Transfer Candidate
	↳ Copy and Paste Resume
	↳ Edit Interview
	↳ Edit Notes

Go Back

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

 POP Admin Center (PAC)

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Take AssessmentOrder CodesView CodesView ReportsInvite CandidateView InvitationsCandidate TrackerAnalyticsAccount Management

Candidate Tracker

From Date2020-01-01AssessmentTo Date2022-09-30# / Page25Position FilterAccount FilterStatus FilterSource Filter

Last Name Search: Get RecordsFirstPrevViewing 1 - 2 of 2NextLast

Candidates															
	#	Date	ID	Name	Email	Msg	Resume	Interview	Notes	Position	Source	Status	Perf	Invite	CMP
☐	1	2020-04-24	S672KSPMV5KY	TEST, TEST	service@selfmgmt.com		+	+	+	Manager		0		Invite	
☐	2	2020-04-24	DOLHCLDQA3G3	TEST, TEST	service@selfmgmt.com		+	+	+			0		Invite	
Actions: StatusExportView Columns															

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.



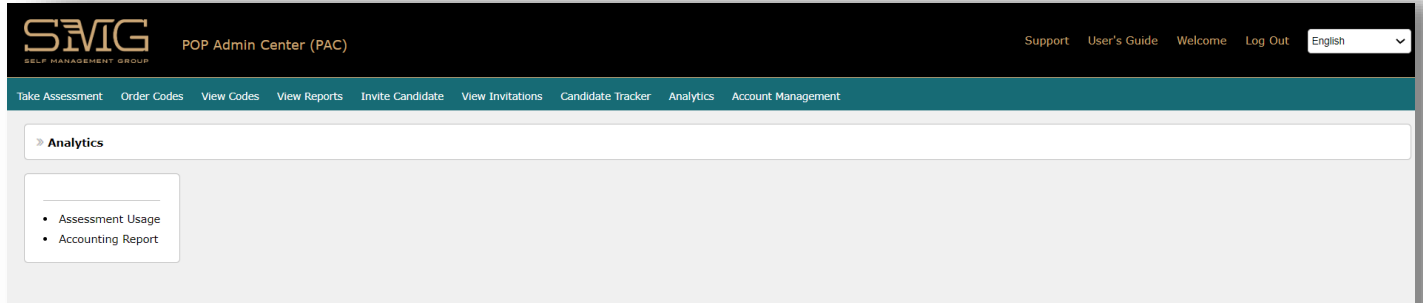
Candidate Tracker – Continued

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).
Resume:	Click on View to access the resume for those candidates who attached one 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



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 ext. 100

Email:

info@selfmgmt.com

service@selfmgmt.com

