TalentClick

Predict Strengths AND Risks.

# TalentClick Portal User Guide

The purpose of this resource is to assist in the use of TalentClick's Cloud-based portal.

Prepared by: TalentClick Workforce Solutions Inc.

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# Introduction

## Overview

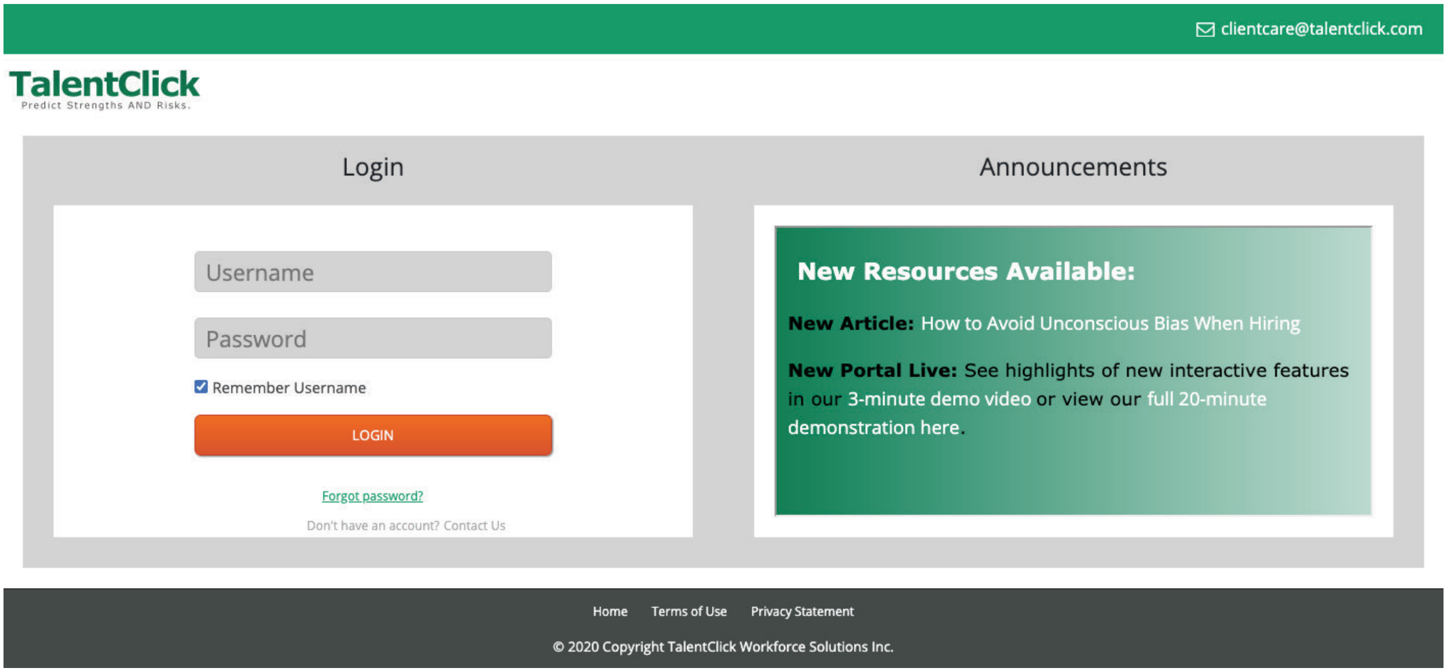
The TalentClick Portal is a user access dashboard that is accessible via your browser and contains your TalentClick reports for all users at your site.

- **Features**
  - Easy to use
  - Search by date, group code, name
  - Click to view reports
  - Send participant assessment links
  - Create, suspend, clone new user accounts
  - Download reports
  - Download groups of reports to zip file
  - Count of reports
  - Generate “usage” and “Team” Reports

# Login

## How to access the TalentClick portal

1. Go to **https://ca.reports.talentclick.com/** (Click the "Click here" link if you don't have an account)
2. **Username** is your email address
3. **Password** – provided by TalentClick
4. **Homepage –** This is the first page you see when you log in. By default, it shows your most recent results by date




## Forgot Password?

1. Go to **http://ca.reports.talentclick.com/**
2. Enter your Username/Email
3. Click the "Forgot Password?" Link
4. Your password will be emailed to you.

*Or you can change your password in the TalentClick Portal*

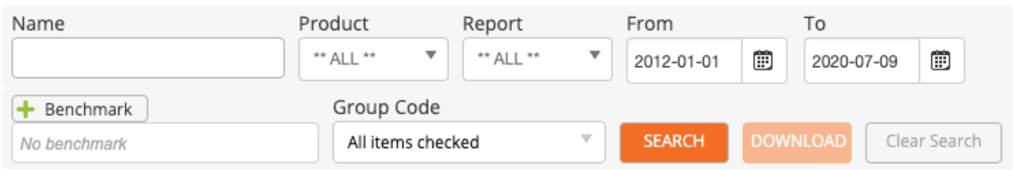
1. Click on Settings > Password Tab
2. Enter "new password" 2 times to confirm
3. Click Save

# Searching for Results

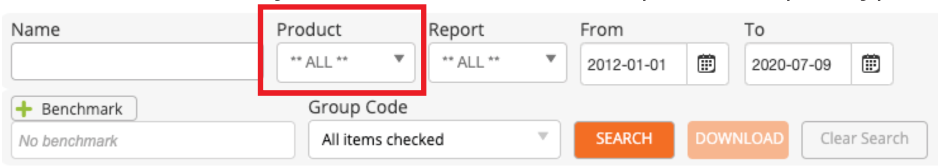
## General Search

*(by name, date, report type)*

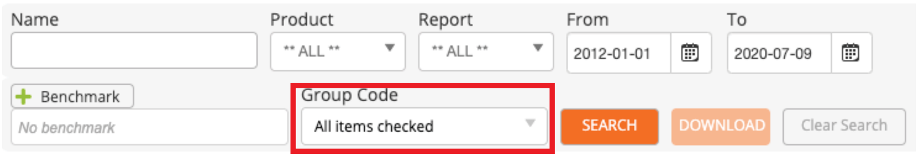
1. Login
2. General Search includes Name, Date Range and Report type
   - **Name** – will bring up the name and variations of the name you enter
   - **Date Range** – allows you to choose a day or date range to find completed reports
   - **Report Type** – allows you to choose Participant or Employer versions of the report
   - **Clear Search** – you must click 'Clear Search' to erase old search parameters and begin a new search
   - **Count of results** – shows the total sum of the reports that your search generated




3. a. **Product** – allows you to search for different product report types (ex. WPP, SQ or CIA)




b. **Group Code** – allows you to search all assessments completed by a specific recruiter using a specific group code



# Fit Score Search

A Fit Score provides quick, at-a-glance, insight into a participant's fit for a specific role. You can instantly see how well a participant's assessment results align with the ideal score ranges for a specific role.

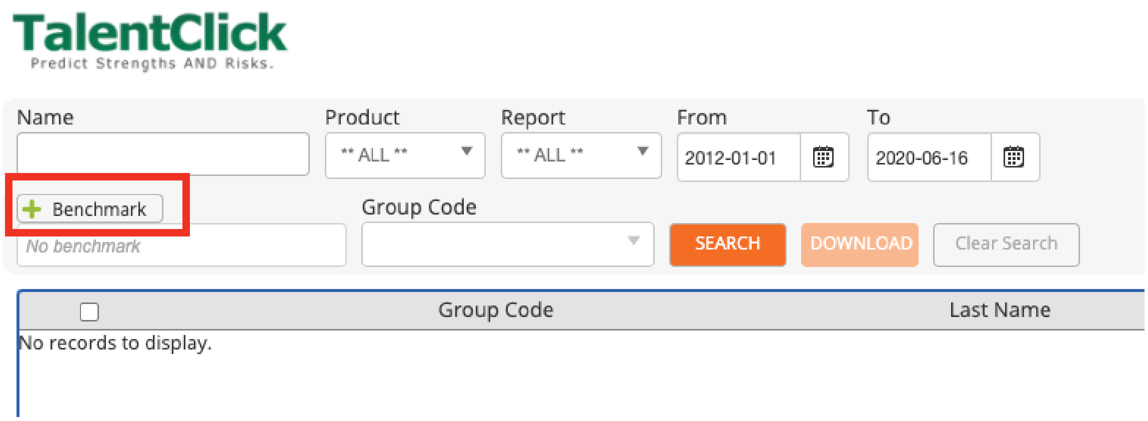
'Search by Fit Score' saves time by prioritizing the people most likely to be a good fit. It gives a TalentClick user (Administrator or Standard) the power to:

- Generate Fit Scores for a group of participants based on fit to a selected Benchmark
- Assign a "Minimum fit score" to filter results of individuals who have a higher fit score above that threshold
- Sort the list by Fit Score results by highest to lowest fit

## Searching by Fit Score

To search by "Fit Score" for a specific Benchmark, navigate to the "Assessments" page of the portal.

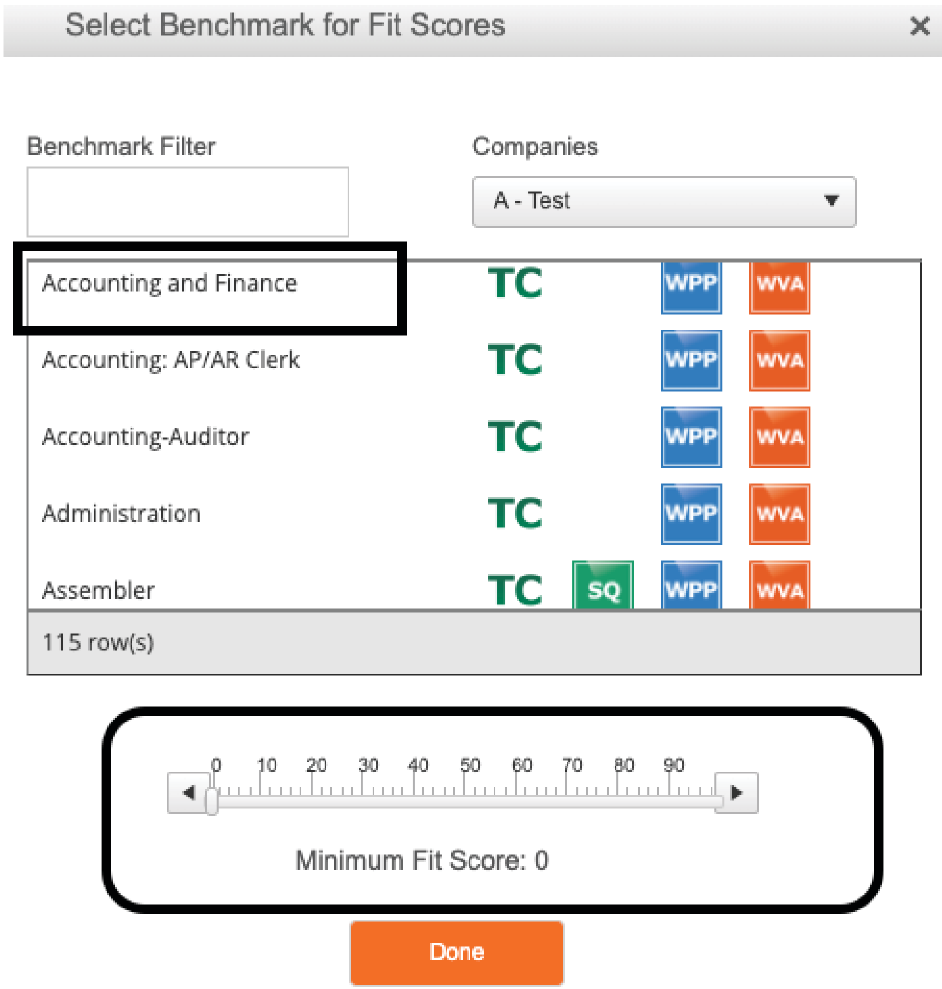
1. Click on "Add Benchmark" icon



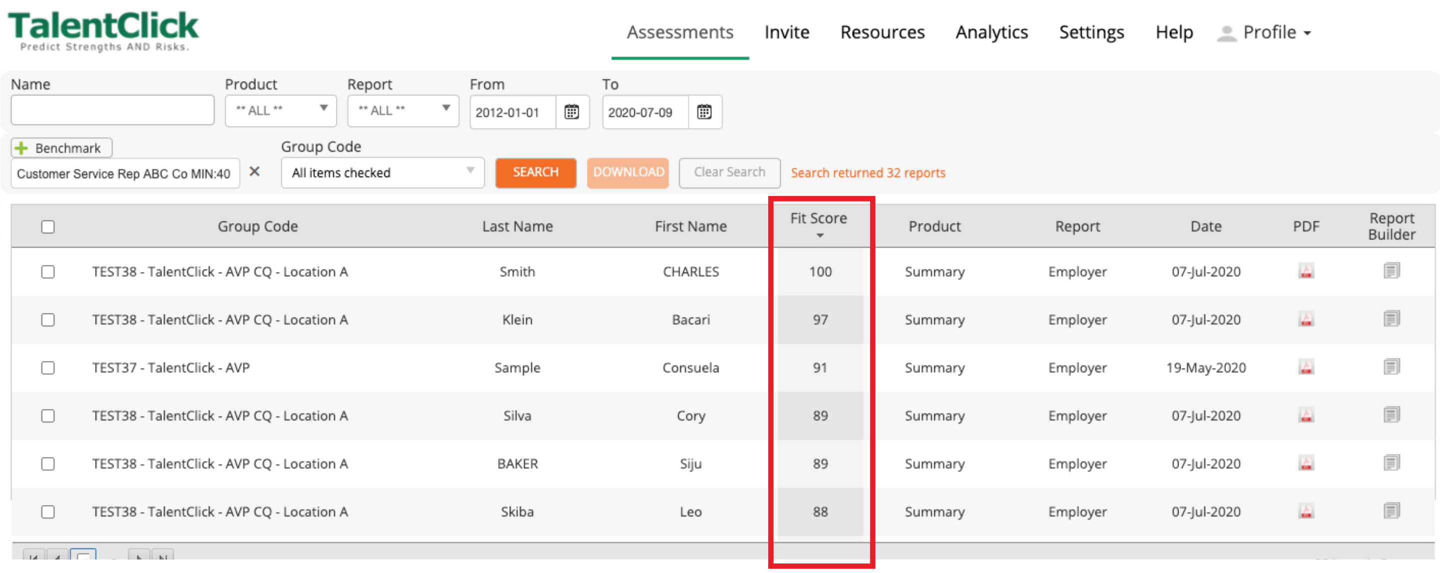

2. Select the Benchmark you want to use in your search.

**Note**: Custom and Standard Benchmarks you currently have in your Benchmark Library will appear in the Benchmark selector. If you have a new custom Benchmark you want to search by, you can add it to the Benchmark library (Analytics tab>Benchmark) before performing this step.

3. Use the slider to select the '**Minimum Fit Score**' (0-99)




4. Click 'Done'
5. On the Assessments page enter any additional search criteria (e.g., Group Code or Report Type)
6. Click "Search"




Results are returned for the participants who meet the criteria and their “Fit Scores” are listed in the Fit Score column.

You can click on the Fit Score column header to sort by Fit Score.

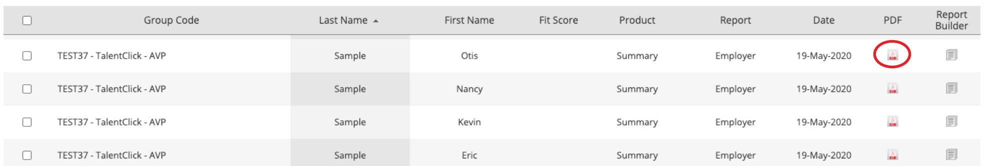
**Note:** If you get too many or too few results then consider increasing or decreasing the “Min Fit Score” in step 3.

## Sort Results

1. Each column of search results can be sorted by alpha order or numerical order by clicking the arrows beside the column name

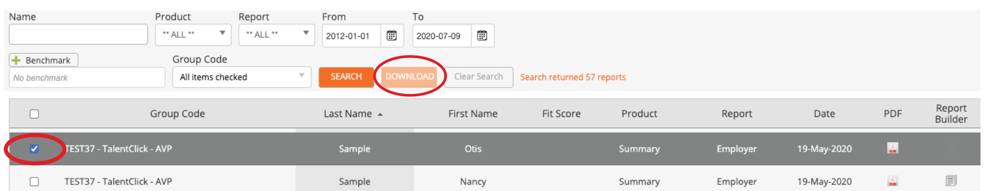

## View Results

1. Click the PDF icon on the right-hand side of the screen
2. The selected report will open in a new browser window




## Download Results

1. Click the check box under ‘Select’ of the report (s) you wish to download
2. Click ‘Download’ from the menu bar
3. Reports are downloaded to a zip file. Zip files will automatically show up in your ‘Downloads’ folder.



# TalentClick Portal Report Builder

The report builder is a feature that enables a TalentClick user (Administrator or Standard) the power to:

- Create individual AVP Reports
- Overlay benchmarks from the library (max 4 benchmarks on single report)
- Select Sections to include on a report
- Arrange/rearrange order of each dimension section (All Products)
- Generate interview questions based on the participant's scores relative to the benchmark
- Assign length of interview report by selecting the number of dimensions included on report
- Locally Save and Print new Benchmark Report

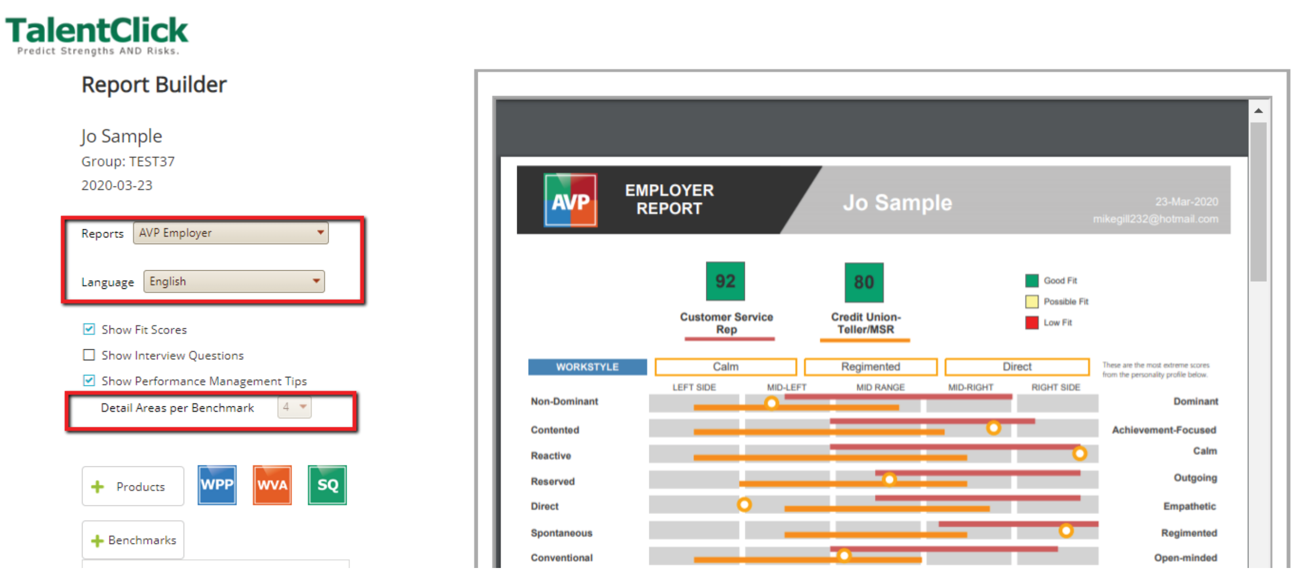
**Note:** More Report Types and functionality are on the way in future updates.  Stay tuned!

### Creating Individual AVP Reports

To open the TalentClick Report Builder click on the "Report Builder" icon on the "Assessments" page on the TalentClick portal.

**Settings:**

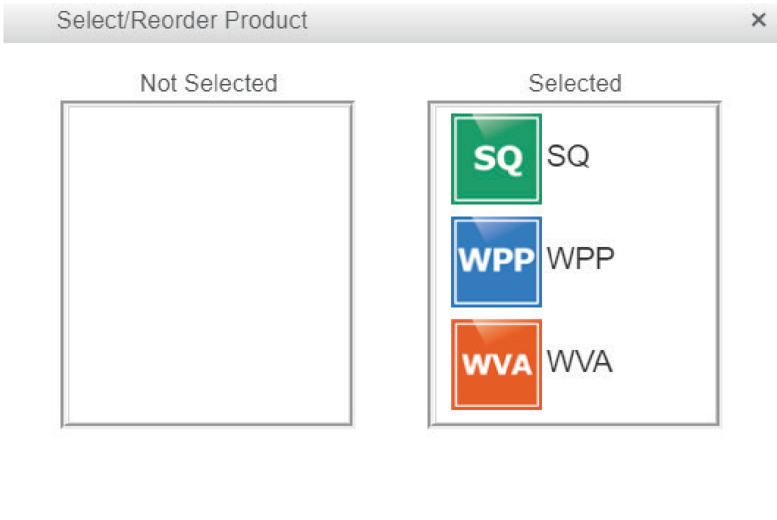
1. Select **Report** types from "Reports" pull down
2. From '**Language**' select the available languages for the report. (more languages to come)
3. **Detailed Areas per Benchmark:** Select the number of extreme dimensions results you want included on the report.



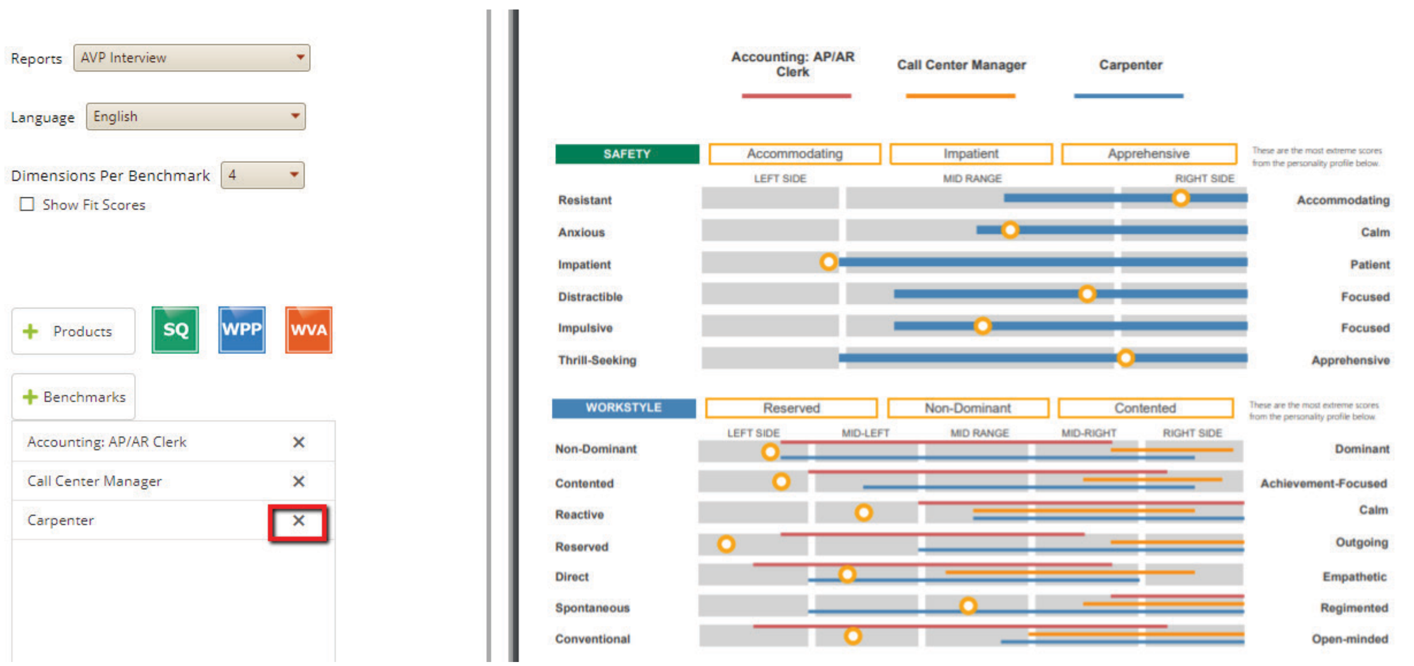

**Show Interview questions** – This option will display sample employer questions that can be used during an interview session with a candidate.

**Show Performance Management Tips** - Performance Management Tips in the report are helpful suggestions for what to expect from the candidate in terms of their strengths or what comes naturally to them, and tips on how to best coach, manage and develop them. Useful for both candidates and existing employees.

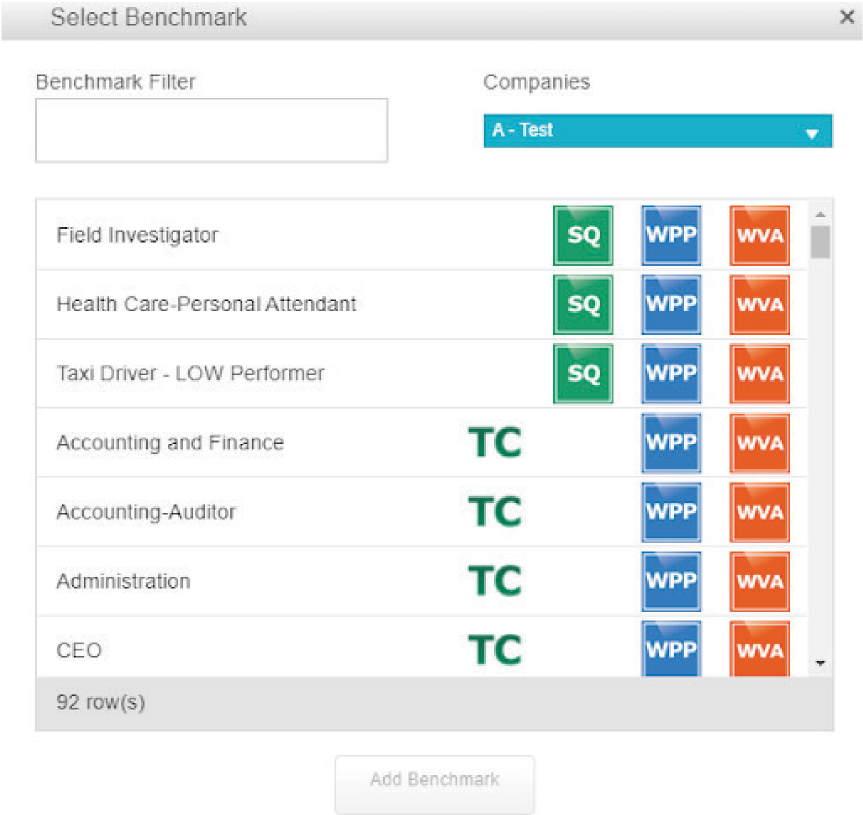
5. **Products:** Click Products to select the available products to include on the report and drag to "Selected" side



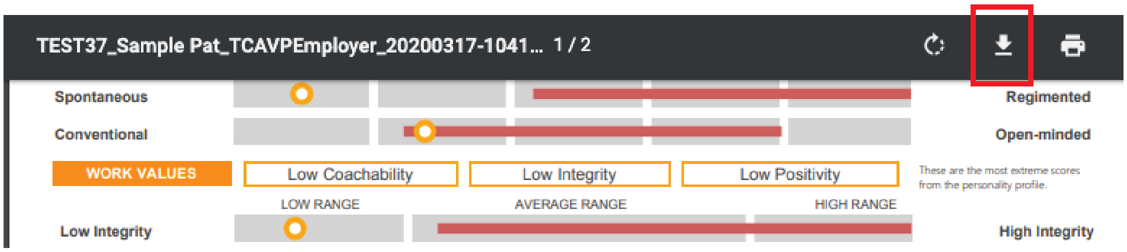

**Note:** To remove the Benchmark from the Report you can click the 'X' on selected "Benchmark" list.



6. **Benchmarks:** Add up to 4 benchmarks to include on the report. Use "Benchmark" filter to search the library.



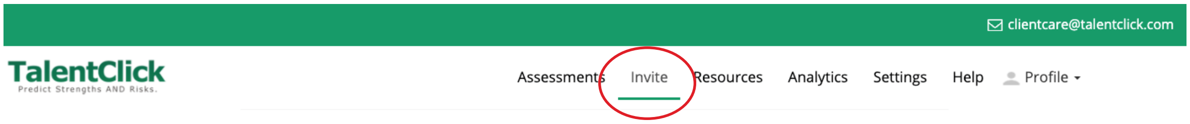

7. **Download and Print Report:** Click on the Report, then click on the "Download" icon



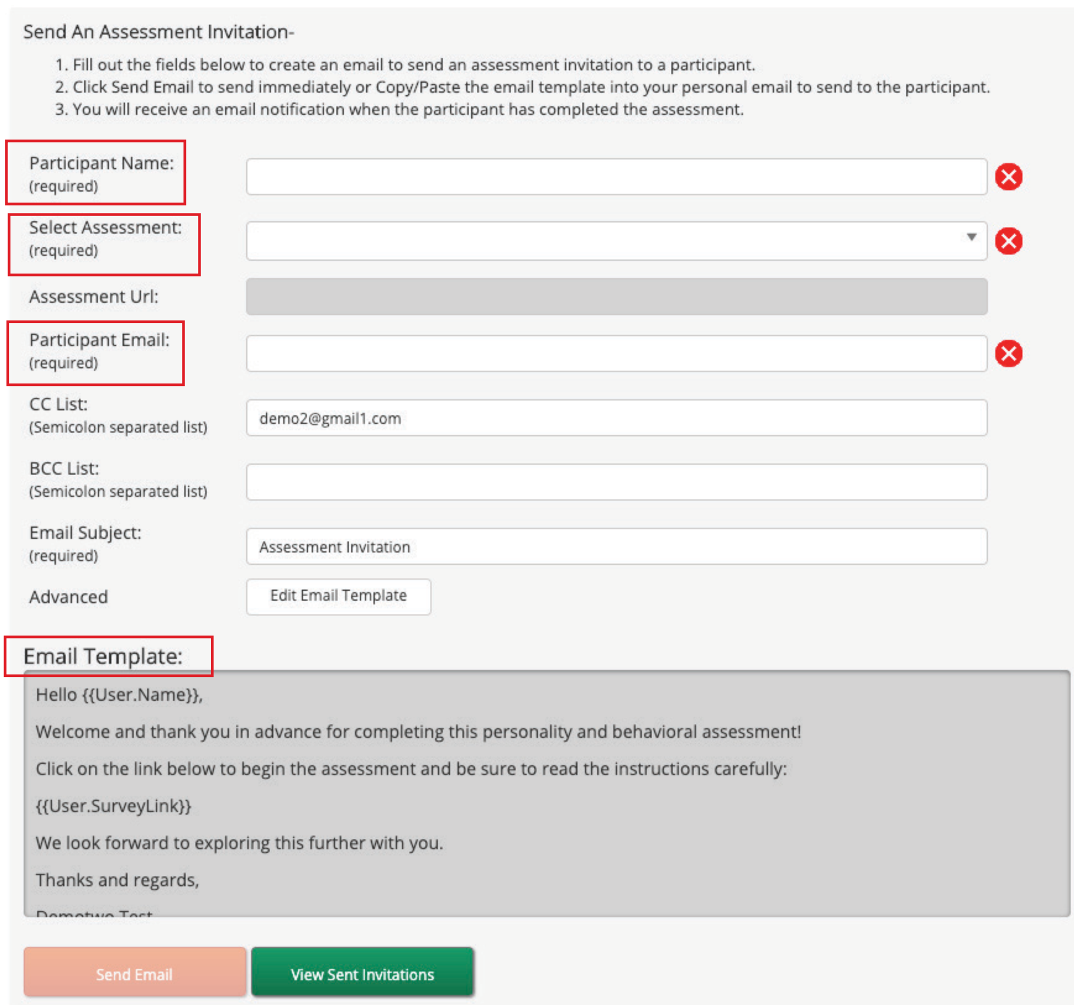
# Sending Assessment Links

## Invite / Assessment Link

The Invite tab allows you send an email to the test taker with the Assessment link for the Survey




1. Click on the “Invite” tab at the home screen
2. Enter the Participant Name and Email address in the required fields
3. Click on the “Select Assessment” pull down to choose the group code associated with the link you want to send
4. Edit the Email Template if needed (optional)
5. Click “Send Email”




***Note:** Another option is to copy the link from “Step 3” and pasting into an email message to send to the participant. This allows the email to have your company branding etc . Sending the assessment link via your company email reduces the chances of the email being trapped by SPAM or JUNK filters as well.*

# Settings - Administrators

## Overview

The Settings tab is a central hub in the TalentClick Portal.  It allows you to view all of the users in your organization who have access to your assessment reports.

There are 2 types of Talentclick Portal users:

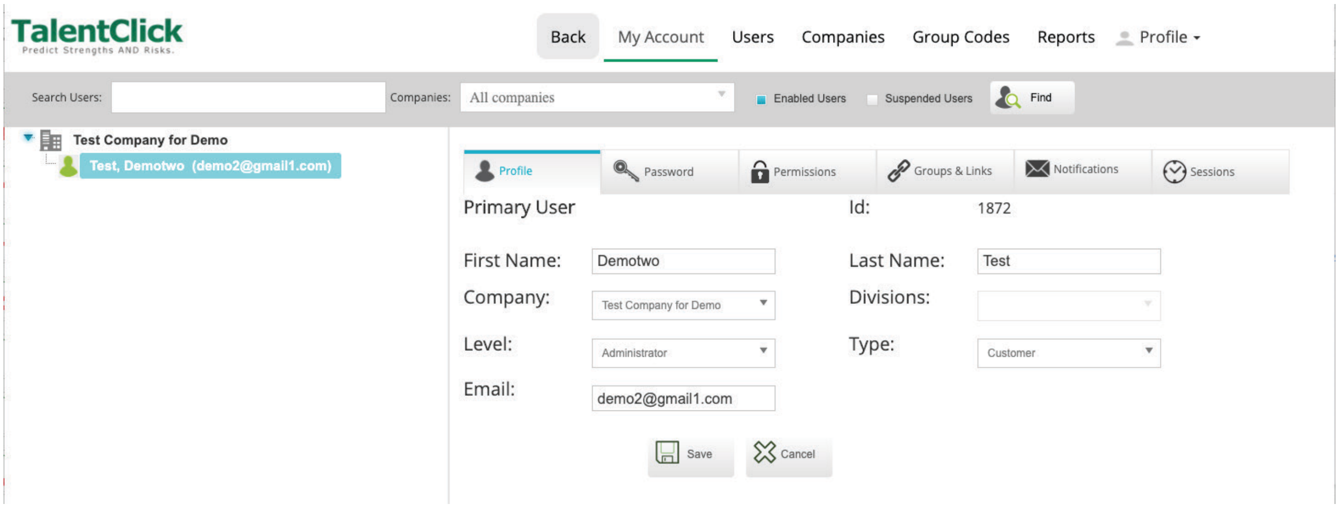
- **Administrator User -** Users who have permissions to view, create and edit other users in your organization's portal. They also have the ability to add and remove group codes, modify profile notifications and general permission settings.
- **Standard User -** User who are able to view completed reports and invite candidates to take the assessment. They are able to modify their own notification settings and profile details but not others.

We recommend each company should have at least one user configured as the Administrator.  This ensures that quick tasks like suspending a user,  adding new users , changing notification settings and other user management tasks can be managed within your organization.

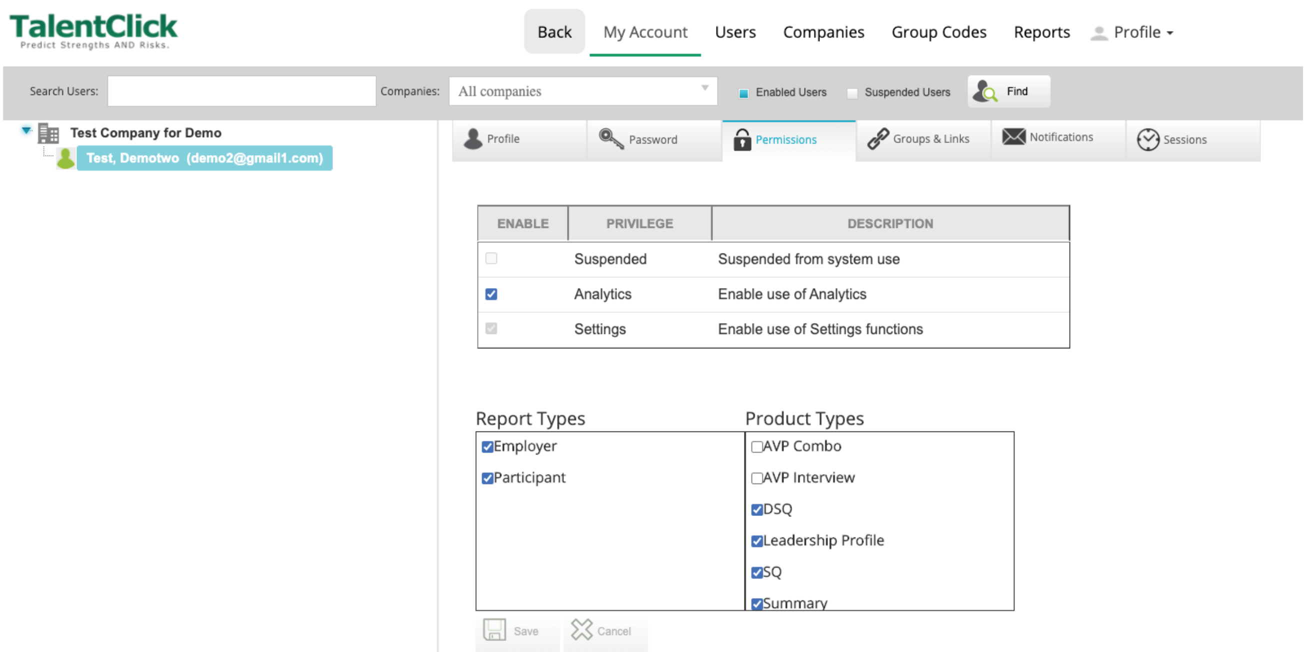
## Settings - Companies

This section holds information related to  your Company TalentClick portal configuration.

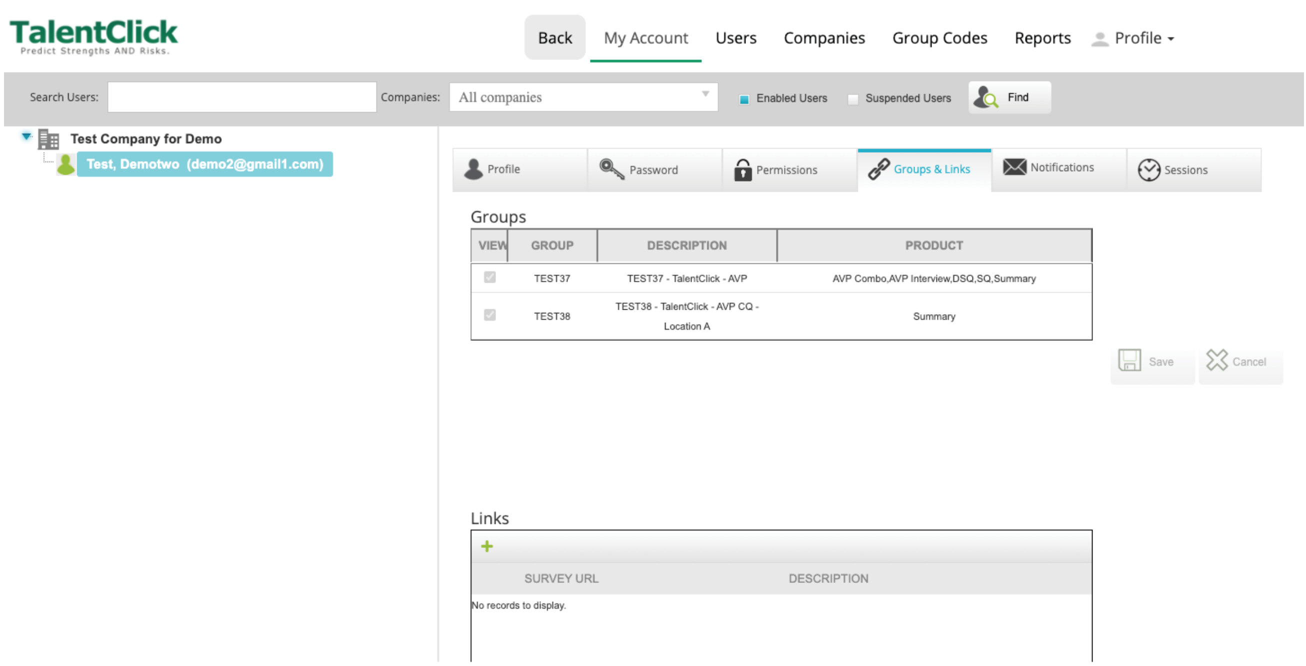
**Profile:** Administrator can edit the Company name and view Group codes available to users in the TalentClick Portal.



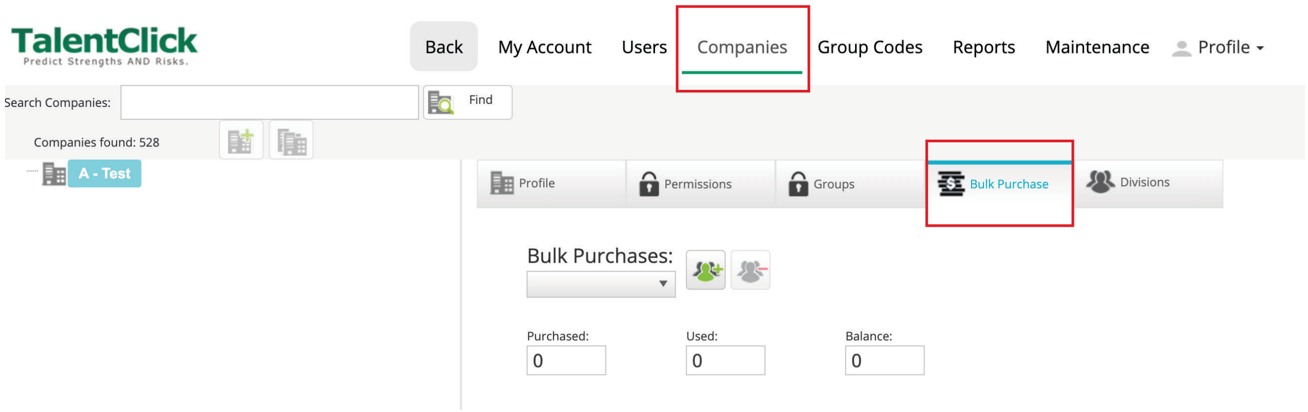
**Permissions:** View the selected Report Types and Product Types available in the TalentClick Portal.



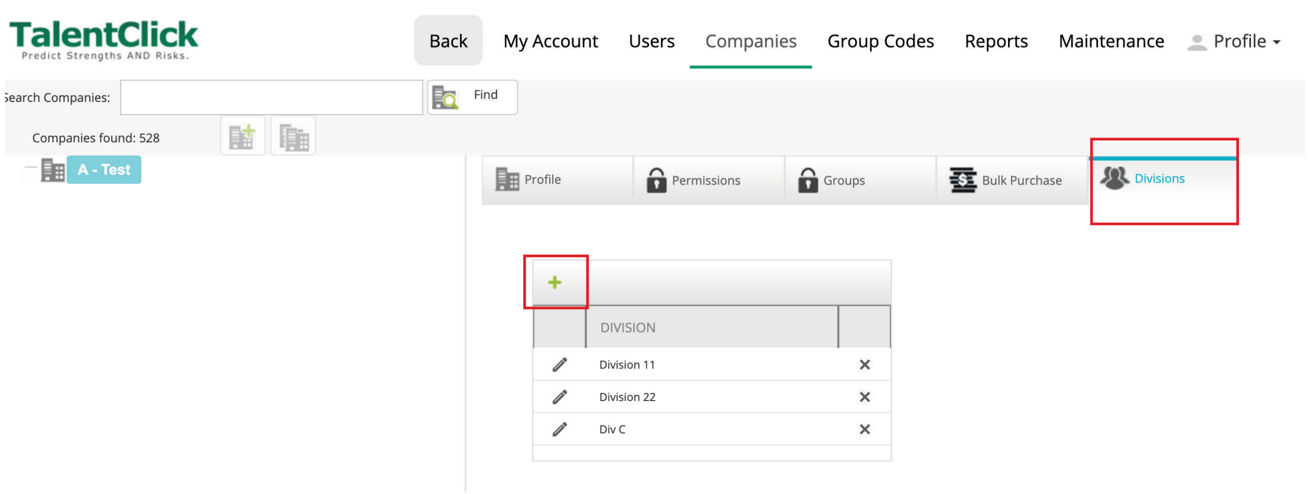

**Groups:** Lists the group codes available to your company to view in TalentClick Portal.



**Bulk Purchase:** If your company uses “Bulk Purchase”, then the available and used amounts will appear on this tab.



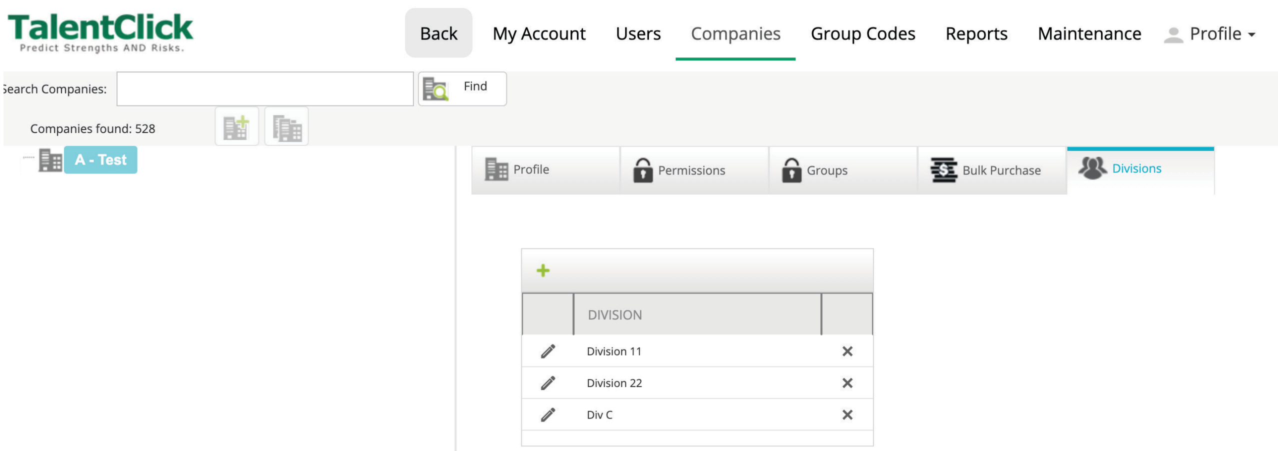

**Divisions:** Lists any Divisions that have been created. Administrator can create Divisions and assign them to Users.



## Creating Company Divisions (Administrator)

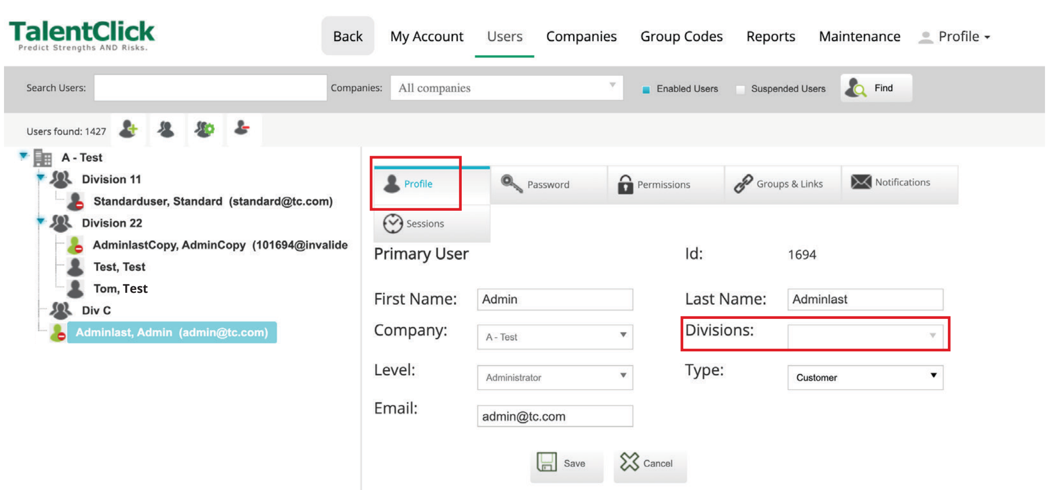
“Divisions” are a subgroup within a Company record.  Its an effective way to create internal company groups that you can assign to users. Divisions can be used for company locations, departments, or by job role - etc.

1. In TalentClick portal navigate to the Settings menu > Companies >  Division tab
2. Click on the + symbol to add a new “Division name”
3. Enter the Division name.  (Division names can be alpha-numeric)
4. Click “X” to save. - repeat this for the number of Divisions needed.



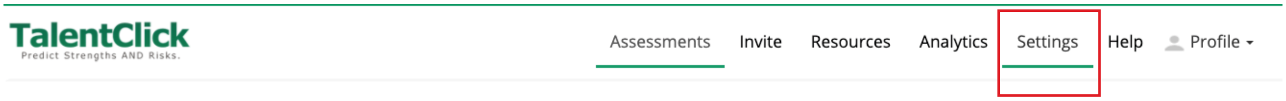

## Assign Users to Divisions (Administrator)

1. Navigate to Settings > Users menu
2. Either click to edit an existing user on the navigation tree or click “new user” icon to create a brand new user.
3. Enter necessary information for the user profile then click on the “Divisions” picklist.  The Divisions picklist is populated by the Divisions created previously on the Company record.
4. Select the Divisions to be assigned to the user.  (Note: Multiple Divisions can be assigned to a user)
5. Click Save



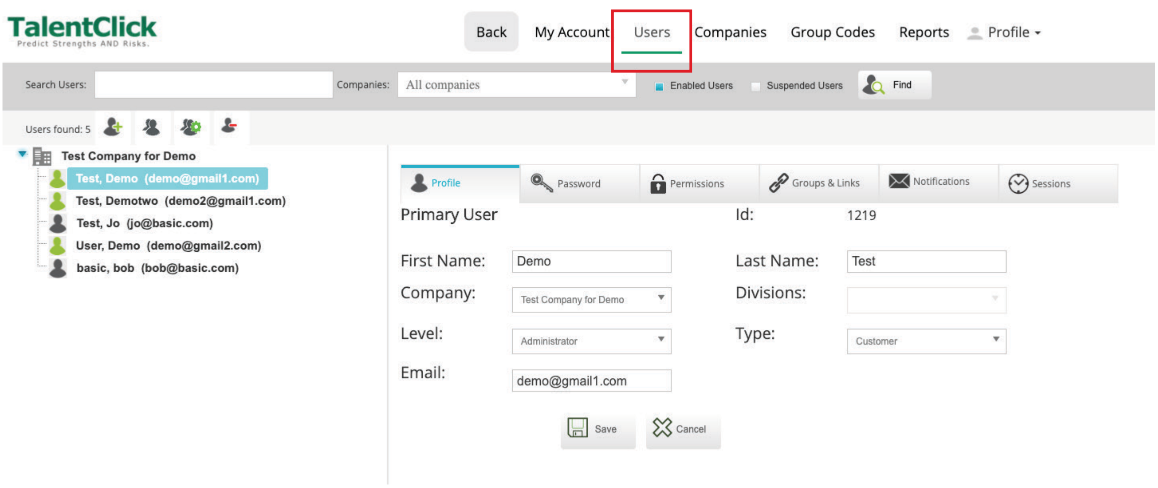
## Settings - Users

1. Login to TalentClick portal
2. Click on **Settings** tab




3. **Administrator User Settings**

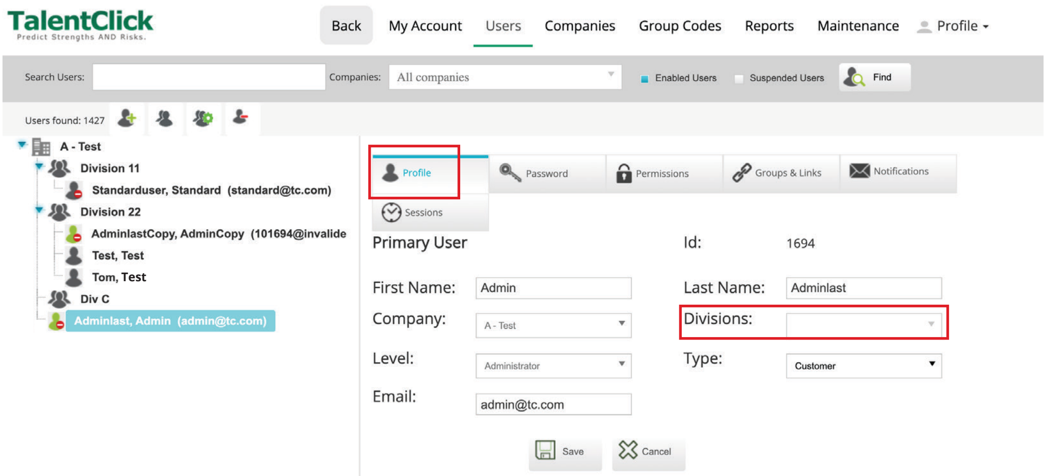
- **Users** - View a list of users
- **Companies** - Company name details and divisions
- **Group codes** - List of group codes assigned to the company
- **Reports** - Bulk purchases reports (if applicable)




**Administrators** can:

- Group codes - Click on the editing icon to edit Group code names and descriptions (Recommend:  Keep the names styles consistent)
- Companies - View only the ‘Company name” and create divisions. (See “Creating Company Divisions” )
- Users - View/edit/suspend users in the portal  and assign Divisions
- My Account - See all the account settings and permissions for the Administrator account

**Standard user settings:**



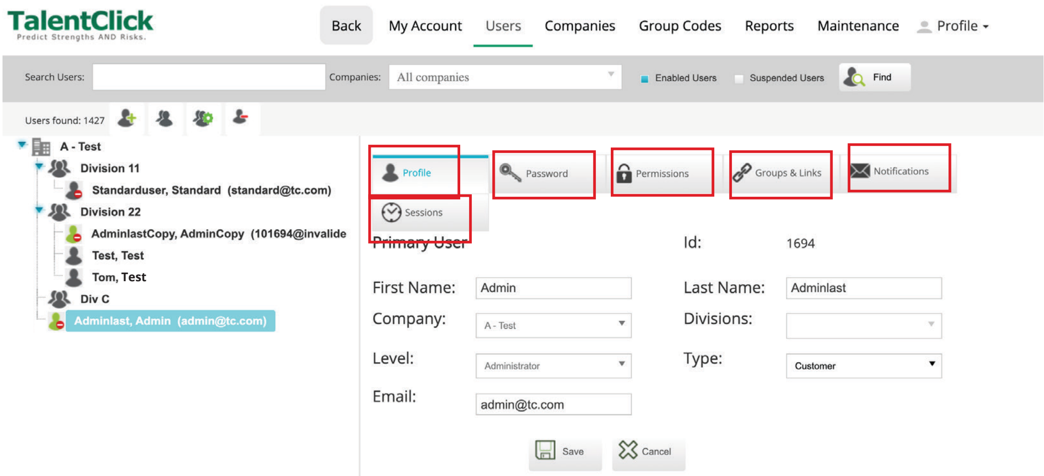
**Standard users** can:

- Company - See Company name
- My Account - See all account settings and permissions for the Standard user

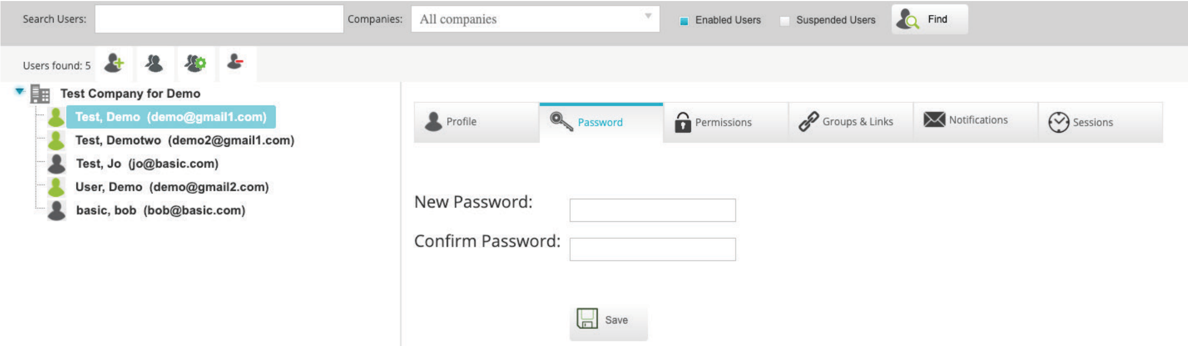
## 4. Universal User Account Settings

Both user types (Administrator and Standard user) have user configuration tabs.

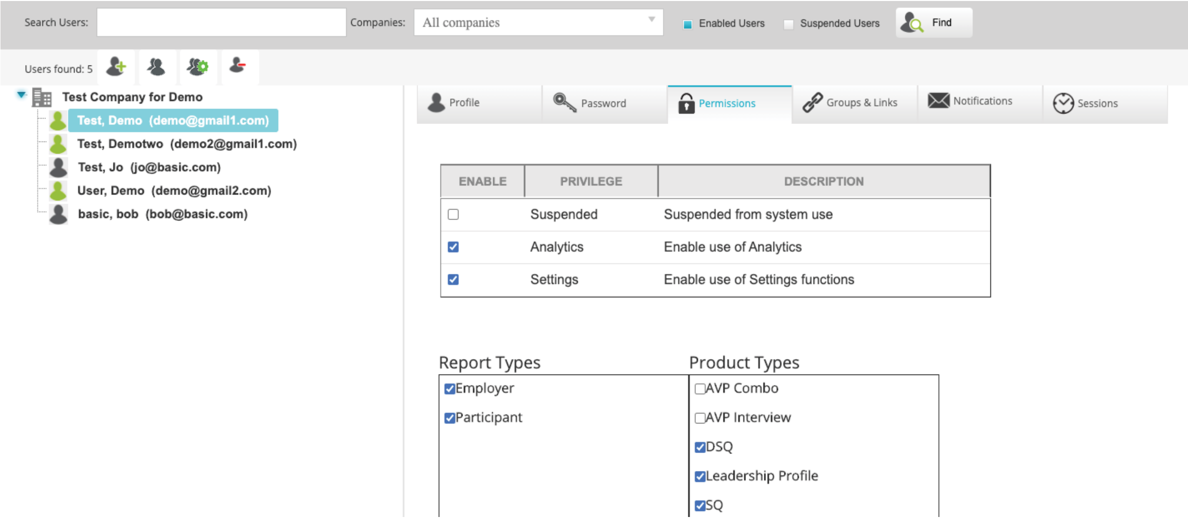
- **Profile** tab - Edit user details > click “Save” (Standard and Administrator user)



- **Password** tab - Reset/change password > Enter new “Password” then click “Save” (Standard and Administrator user)

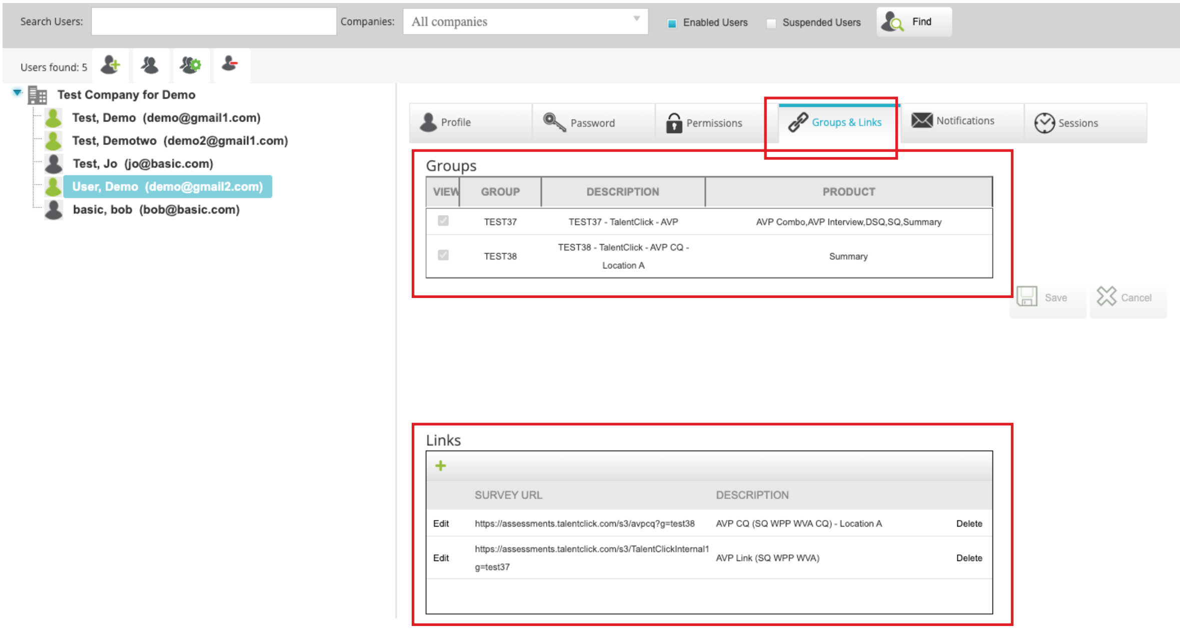



- **Permissions** - Edit Permissions to define view for completed assessment reports types in the TalentClick portal (view only for “Standard” user. Read/write for Administrator)



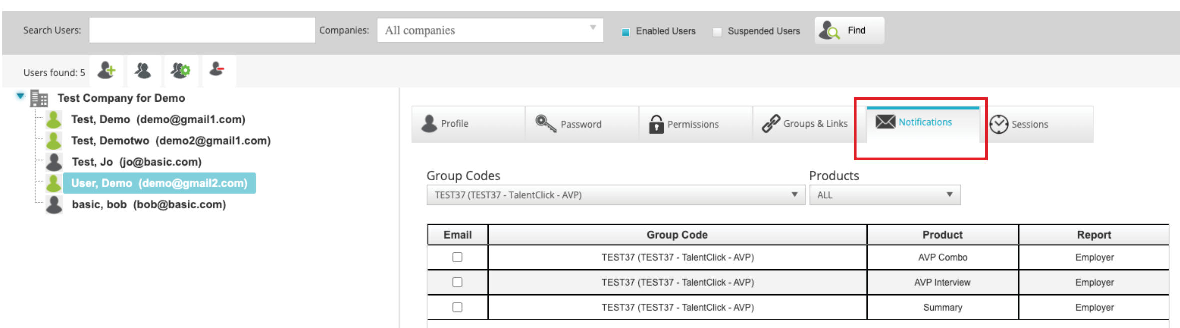

***Note:** Administrators who enable “Suspended” for the user will make the user profile inactive. The user will no longer be able to login to the portal or receive email notification of completed reports they have subscribed for under the “Notifications” tab.*

- **Groups and Links** - Groups - Select the groups for user to view assessment reports in Talentclick portal (view only for Standard users) ;
  Links - contains the assessment links to be sent to candidates. Administrators can add URLs and edit descriptions of Assessment links

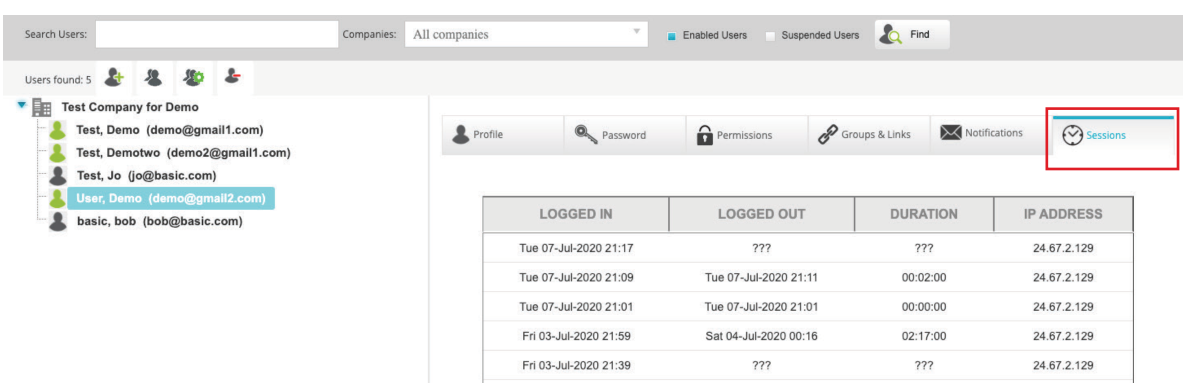



***Note:** URL listed under the " Links" section appear under the "Invite" tab and are used to share assessment links with Participants by email*

- **Notifications** - Click "Email" for each report you want to receive an email notification for (Standard and Administrator users). If you have multiple group codes in your profile, use the "Group codes" pull down menu to select other group codes.




- **Sessions** - View login history for the user.

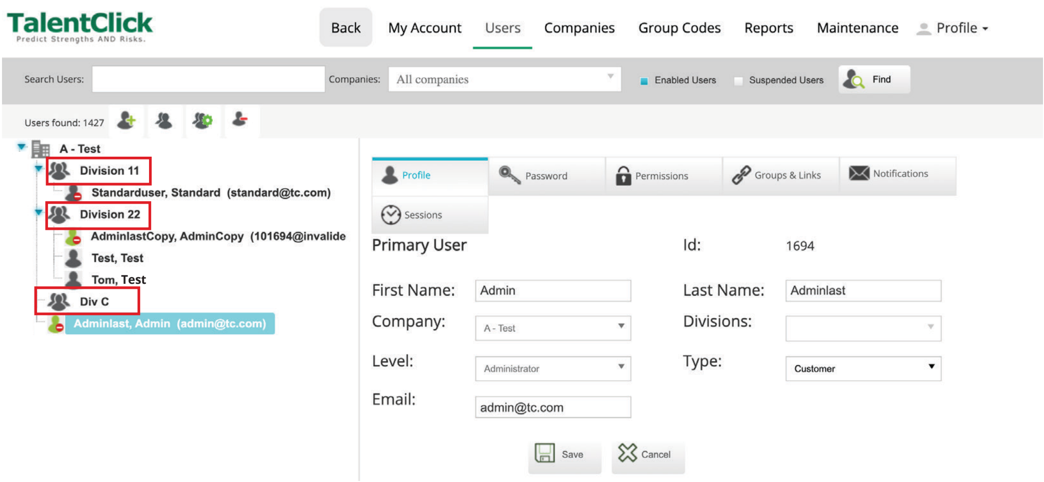


## Viewing Divisons and Users (Administrator)

All TalentClick users for your company will appear on the left panel of your settings screen when the **Users** tab is selected.

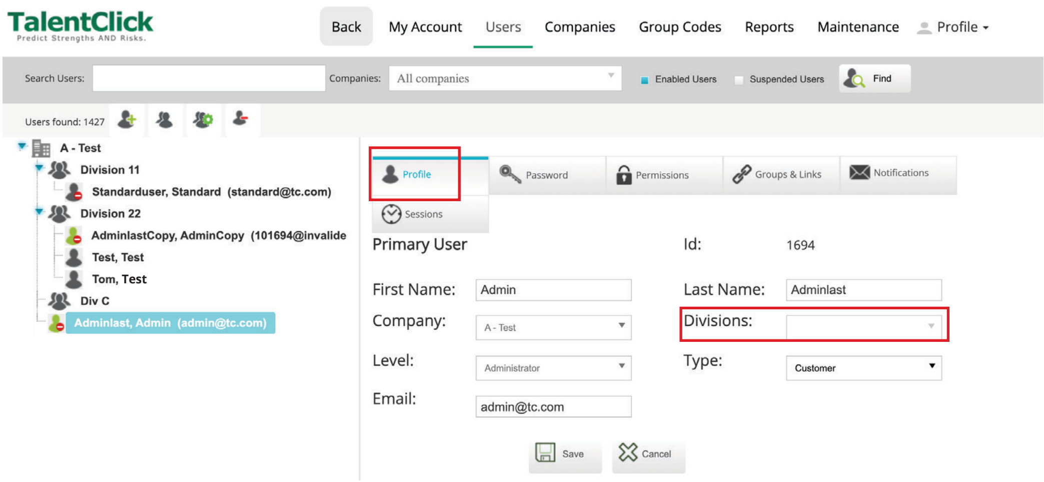
**Divisions** appear under the Company, then users appear under the Division name in the panel.

- If a user is not linked to a "Division" then user name will appear at the end of the user list.
- If no Divisions are created then all users will appear in alphabetical order under the company name.
- If a user name is assigned to more than 1 Division, they will appear multiple times. One for each of the divisions they are assigned to.

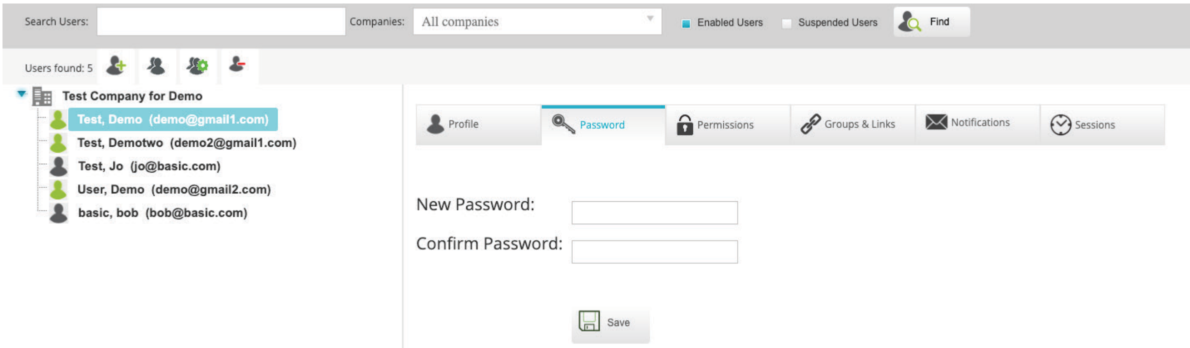


## How to create a new user: (Administrator)

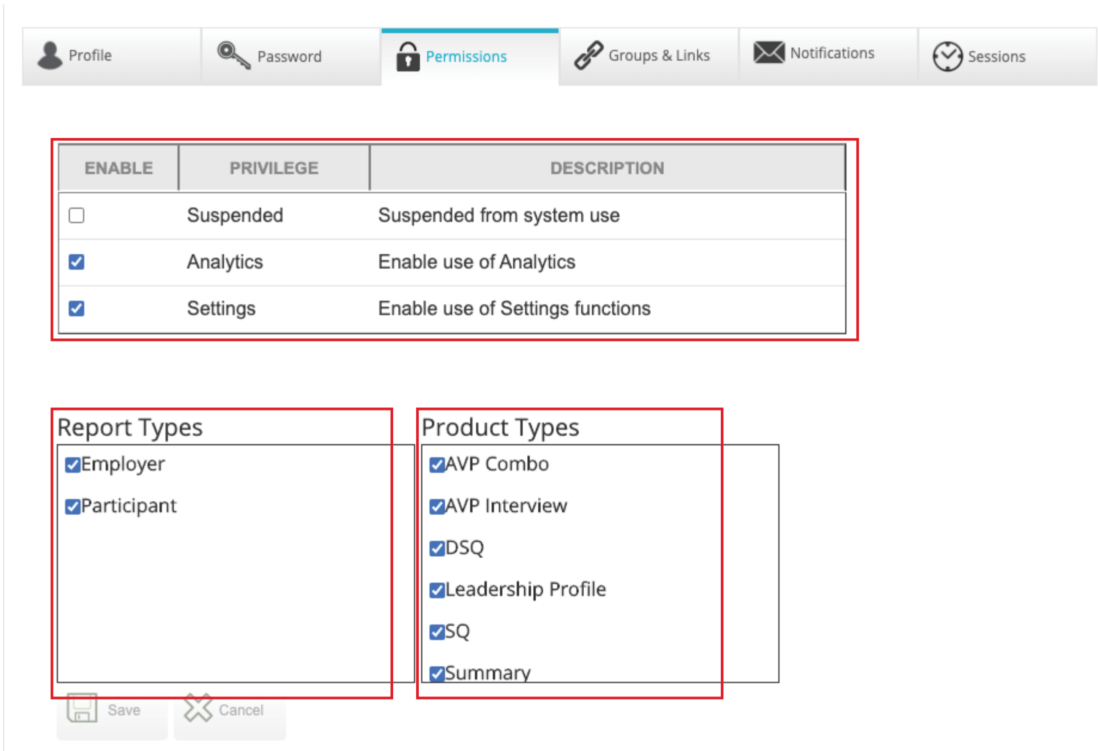
1. Login to TalentClick portal and navigate to “Settings” Tab
2. Click on Users (left side menu)
3. Profile: Use the appropriate option to create a new user. 2 options include:
   - **Create New user** - Click this to create a new user and manually configure their profile
   - **Copy Existing user settings to a new user** - Click this to copy an existing user’s settings and configuration. You will have the option to edit First and Last name and email address before saving the new profile.
4. Enter First, Last name and Email address.
5. If using “Divisions”, Select the appropriate Division name(s) you want to assign to the user. *(Note: If you need to create new Company “Divisions” see section “How to create Divisions” (Administrator) in this guide.*
6. Then click “Save”




7. **Passwords:** Click on the “Password” tab if you want to change the default password. Click “Save” to update the password.

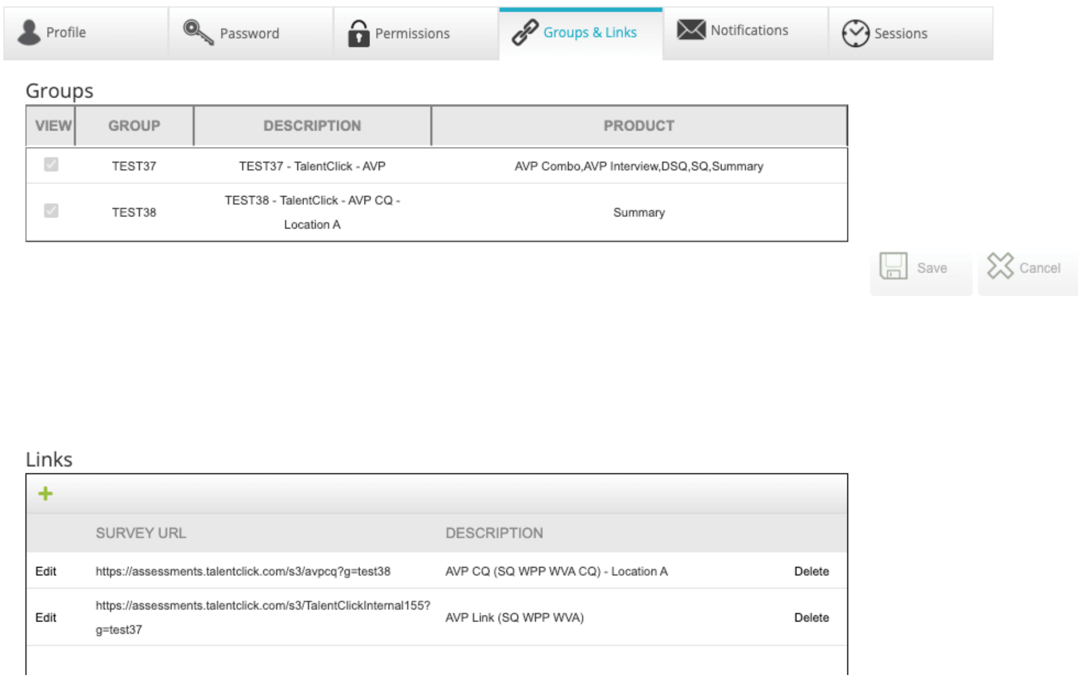


8. Select “**Permissions**” tab - Choose the areas of the TalentClick portal the user can access:
   **Analytics** - Usage and Team reports;
   **Settings** - allows users to access their user account to view their settings (Recommended)
   ***Suspended - Note:*** *Selecting the Privilege of “ Suspended” will disable the user account. The user will no longer be permitted to login to Talentclick portal or receive email notifications subscribed to under the “Notifications tab”*
9. Select “**Report types**” to be available to view for this user
10. Click “Save”

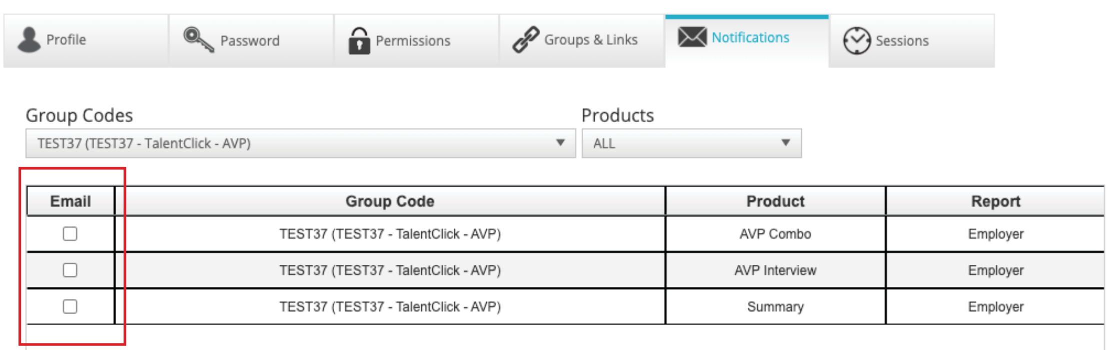


11. Navigate to "**Groups and Links**" tab - Select the Groups the user needs access to under the "Groups" selection area
12. Links section click the green plus sign (+)
13. Enter the url and brief description of the assessment used to invite participants to start the survey.

***Note:** If you are unsure of the Assessment URL contact:* **clientcare@talentclick.com** *with the Group code and we'll get that information to you.*




14. ***(Optional)*** Click on "Notifications" tab to subscribe to email notifications when the participants have completed that assessment and it is available for review in the portal. (notification emails also contain an attached copy of the assessment report)



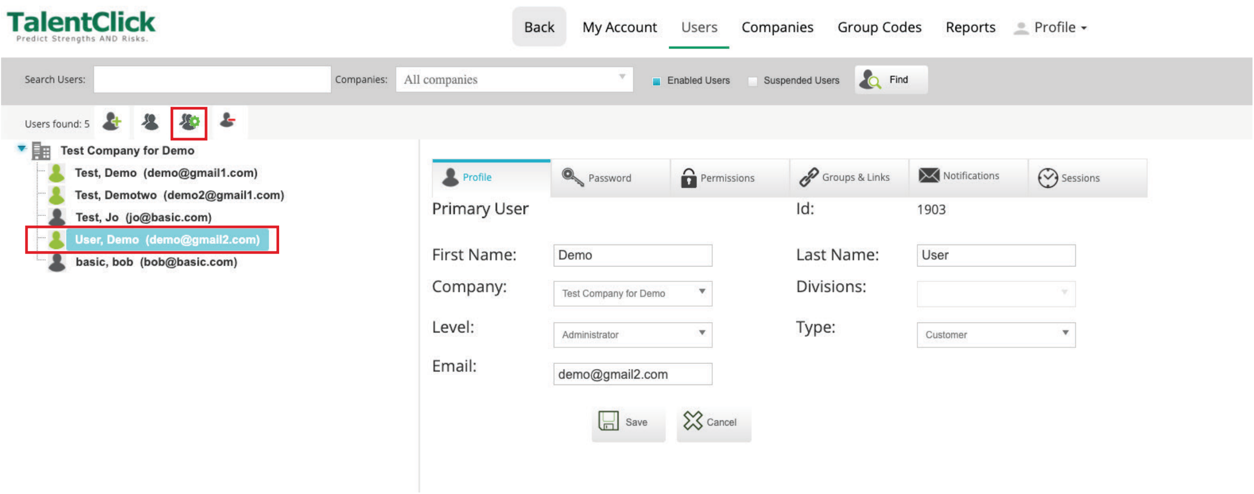
## Copying settings from Existing user to another user (Administrator)

This feature allows the Administrator to copy an existing user's settings and append (or overwrite) to another user if they have similar permissions.  This will save time from having to manually edit each user configuration changes.
***Note:** "Copy Settings of Selected User"  will append "Permissions" , "Group and Lists" and "Notifications" information.*

1. Login as Administrator and navigate to "Settings" tab.
2. Go to Users

*Note: Ensure the 'User' you want to copy from has all the settings you need to assign to another user account*

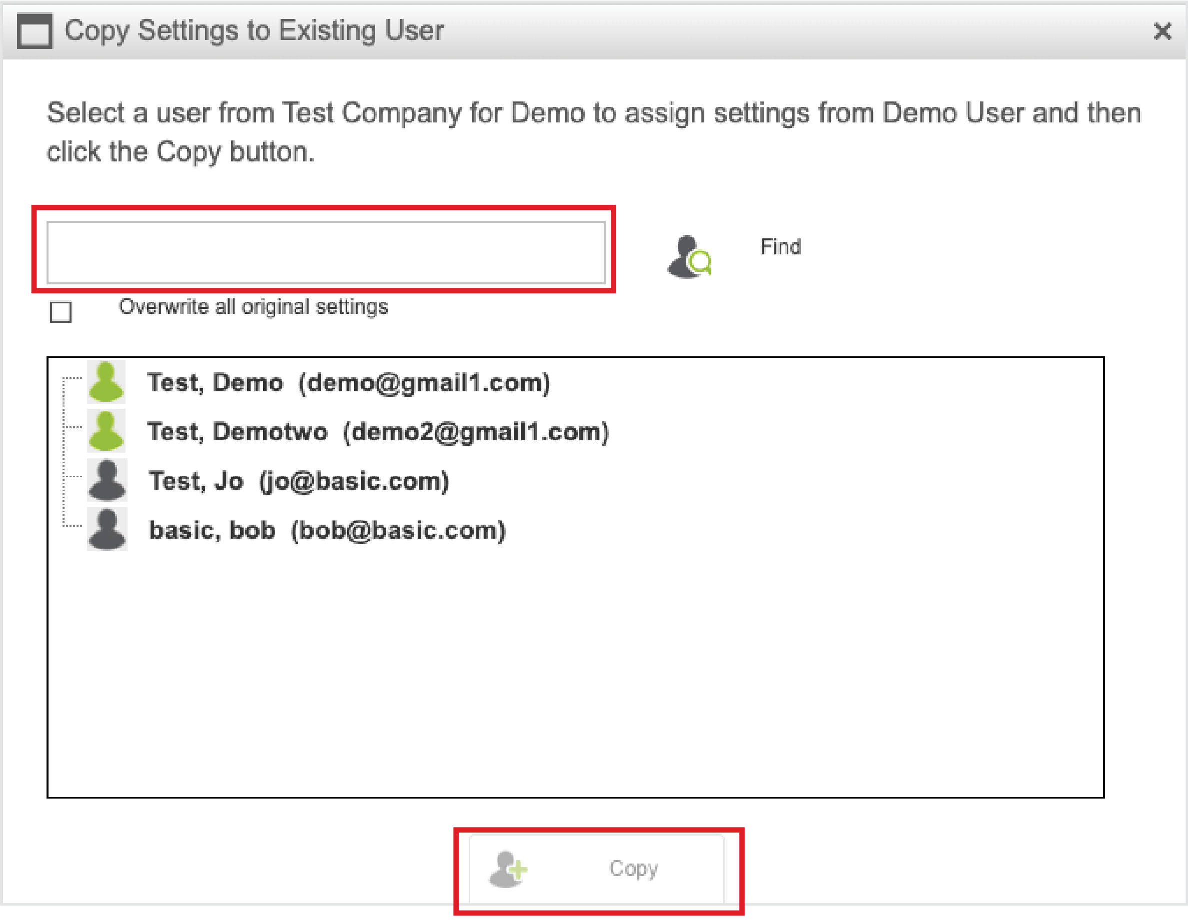
3. Highlight the user you would like to Copy settings from
4. Select icon to "**Copy settings of selected user**"



5. Search or Select the user name you want to assign the settings to.

**Important: Settings from highlighted user will be appended to the user selected in this screen. This means it will not remove any settings only add to user permission what isn't already assigned.**
**If you want to also remove settings and make an exact clone of the highlighted user you can check the "Overwrite all original settings" flag to clone settings from the highlighted user to selected user in this screen. This will remove all settings and apply settings from the selected user**

6. Confirmation dialog box will appear confirming the changes you are about to make.
7. Select "Yes"

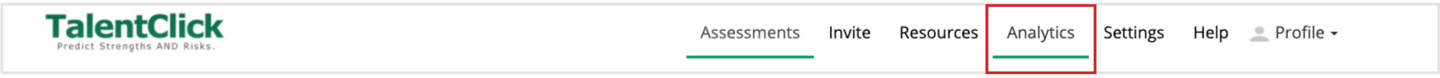


# Analytics

## Overview

Analytics tab is the reporting section of TalentClick portal. Team reports, Benchmark library and Usage reports can be found here.

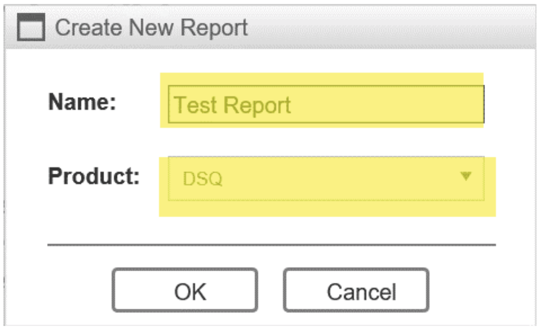
1. Login
2. Click on the Analytics tab



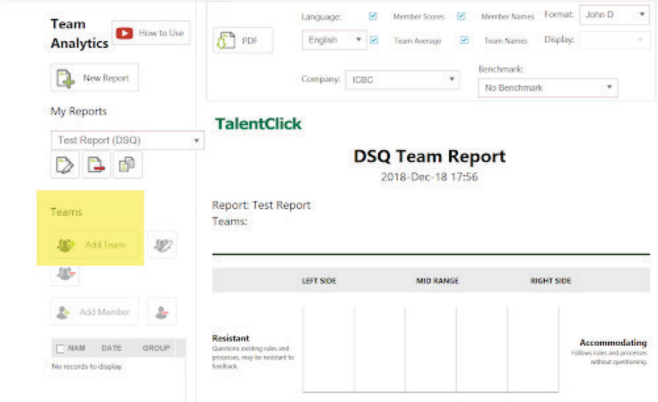

## Team Reports

1. Click on "Team Reports"
2. To create a new team report click the "New Report" button

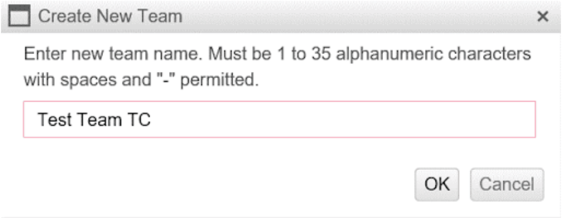

3. Enter the name of the new report and product type and click 'OK'



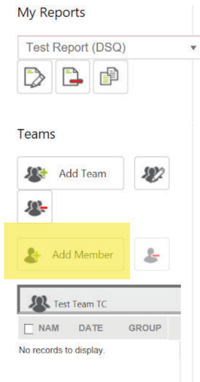
4. Create and Add Team – click on ‘Add Team’



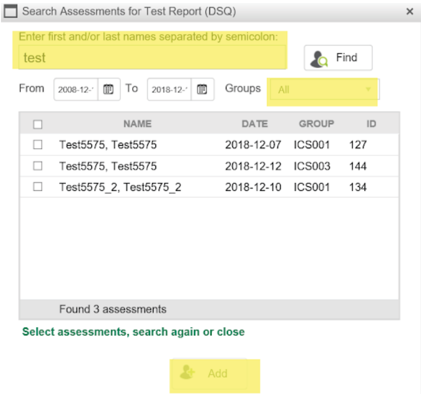

5. Add Team name




6. Add members to the “Team”. This can be individual names or select “Group code”

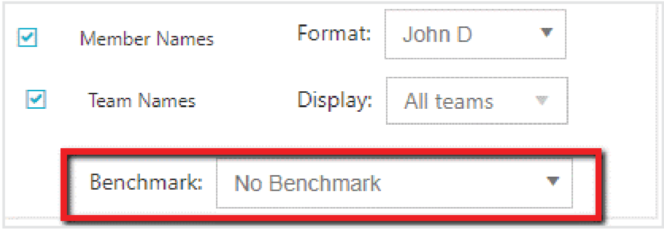



7. Enter Name to search or use “Groups” or date range picker. Then Click “Add”



8. Close the "Find" box when all name you want on the report has been added.
9. You can now view the content of the report. You can change the features that appear on the report such as the "member Scores", "Team Names" , "Benchmark" and "Company Name"

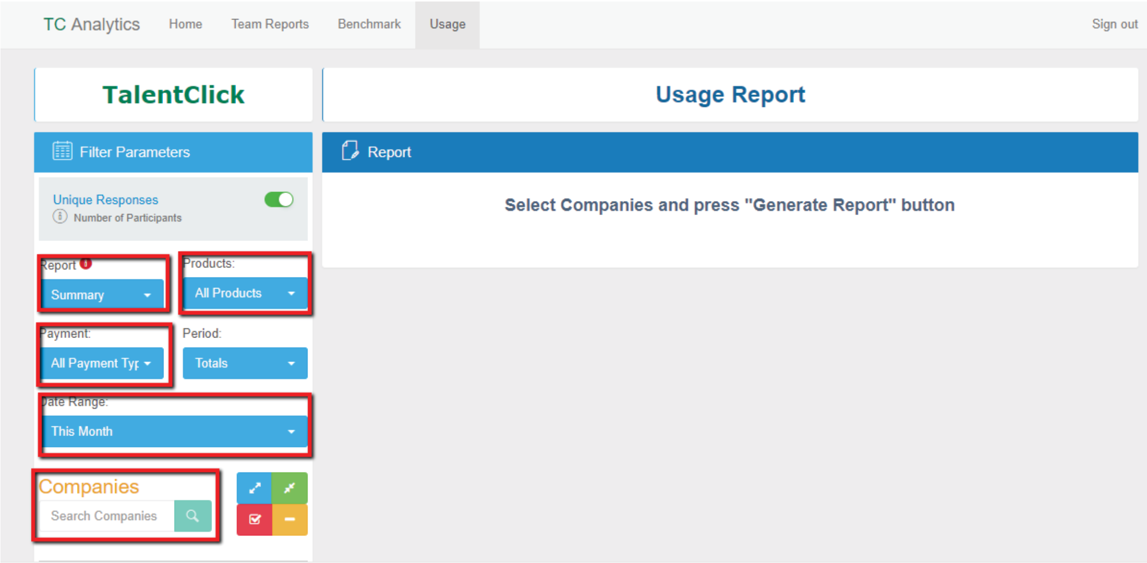
***Note: Using "Benchmark" will add a "target score range" highlight to the report plotted with the members you've added to the report. It's a quick way to create a one-off benchmark report for 1 or many participants.***




View our "How to use" video if you need more information on Team Analytics

# Usage

1. Click on the usage menu - usage reports give you usage data for the “Group codes” linked to your Assessment reports




2. Click on the usage menu - usage reports give you usage data for the “Group codes” linked to your Assessment reports
   - Report (Summary or Detailed)
   - Products:
   - Payment:
   - Period:
   - Date Range:
   - Companies:
3. Then click “Generate report”
4. Once the report is generated on screen it can be saved as CSV

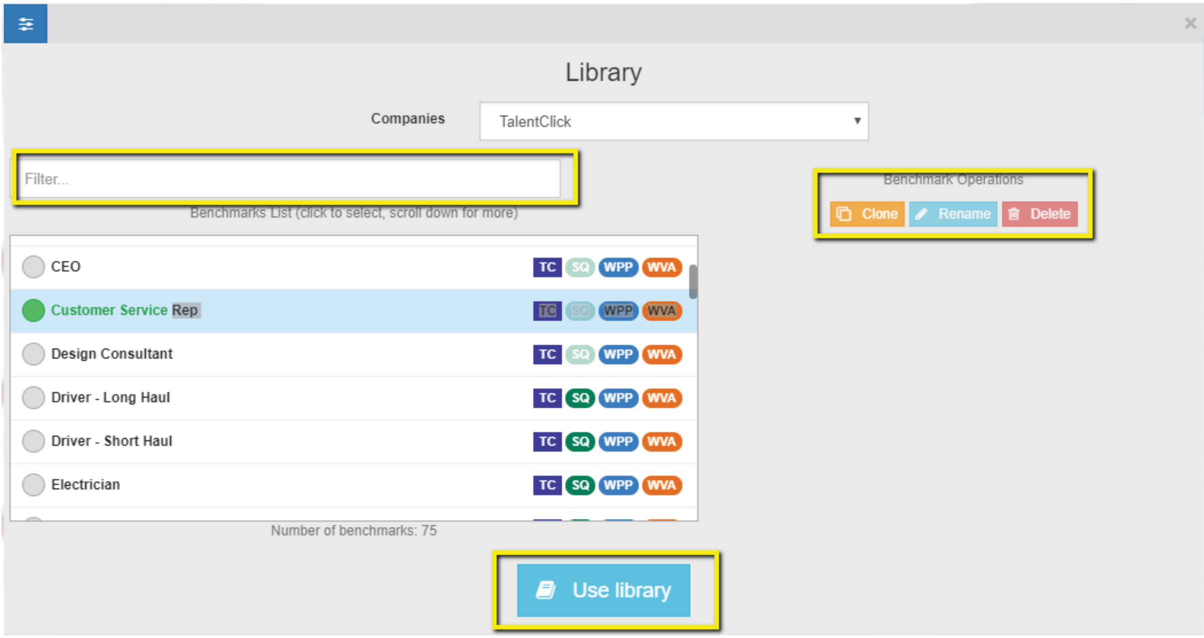
# Benchmarks

## Overview

Benchmarks are “target score ranges” of dimension scores overlaid on the Team and Assessment reports that provide insight on how individual assessment scores compare to an “ideal profile”.

This feature allows you to create custom “Benchmark” ranges, save them, and overlay them on your “Team reports” in the TalentClick portal.

1. Click on Analytics tab > Benchmark
2. Generate a Benchmark > From Library
3. Select a Benchmark from the list (or use the Filter field to search)
4. Click “Use Library”
5. Benchmark ranges are displayed. The available dimensions to rearrange will be displayed ranges and save as a new Benchmark code

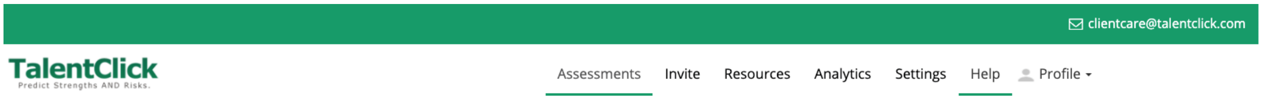



***Note:** If you’d like to have specific Benchmark ranges to appear on all your **Assessment Reports** please contact us to discuss details. We can customize Benchmark ranges to be based on data specific to your team or organization. (support@talentclick.com)*

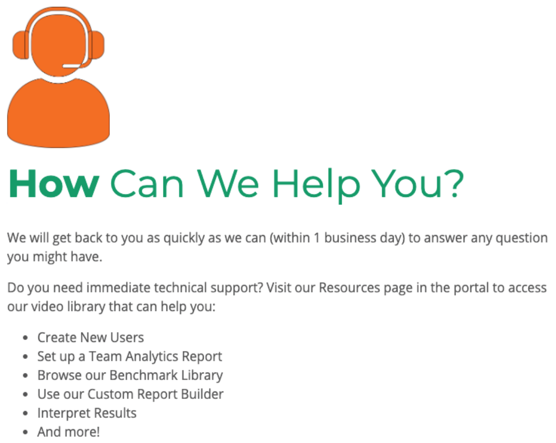
# Support Request

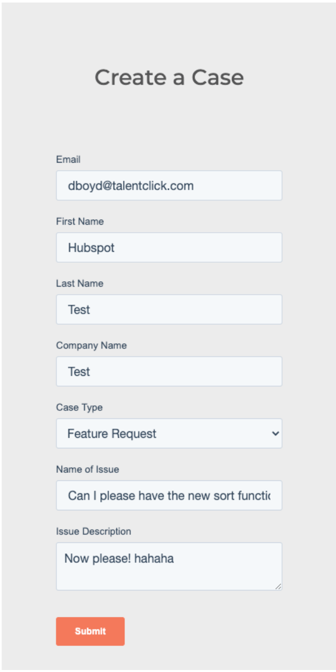
If you have questions, feedback or unique problems:

- Log a support ticket by clicking ‘Help’ in the top right corner of your home screen




- Fill out the form, explaining your comment or issue
- TalentClick Customer Support will follow up with you within 1 business day
- Alternatively, you can send an email to: **support@talentclick.com**




# Contact Us

**support@talentclick.com**