

TalentClick Portal User Guide

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

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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

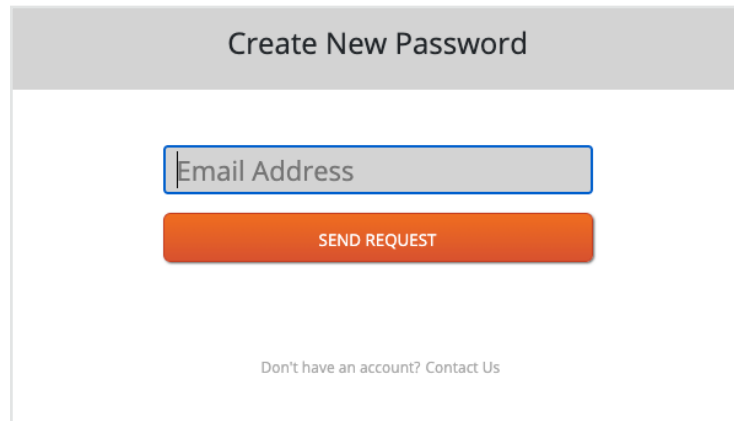
How to access the TalentClick portal

1. Go to <https://reports.talentclick.com/>
2. **Username** is your email address
3. **Password** – Set by user via email link
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://reports.talentclick.com/>
2. Click the “Forgot Password?” Link

3. Enter your email address and click **"Send Request"**



4. Check your email inbox for email validation.

Note: The validation email contains a link you'll need to assign a "Password" to your TalentClick portal account. The link in the email is active for 24 hours. You will need to repeat the process if the link expires.

5. Click the link in the email validation message to reset your "Password" (***Please note the special characters and on screen requirements for your new password***)
6. Once your password has been "Successfully" changed, log into TalentClick portal with your new password.

Changing your password in the TalentClick Portal

1. Login to your Talentclick portal
2. Click on Settings > Password tab
3. Click on "Send" . This will activate the "Send email with reset URL link to user"
4. Check your email inbox for the Email reset link request

Note: (If you don't see the email in your inbox in a couple minutes check your "SPAM and Junk folder"

Note: The validation email contains a link you'll need to assign a "Password" to your TalentClick portal account. The link in the email is active for 24 hours. You will need to repeat the process if the link expires

5. Click the link in the email validation message to reset your "Password" (***Please note the special characters and on screen requirements for your new password***)
6. Once your password has been "Successfully" changed, log into TalentClick portal with your new password.

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

The screenshot shows the General Search form with the following fields and values:

- Name:** Empty text input field.
- Product:** Dropdown menu showing "** ALL **".
- Report:** Dropdown menu showing "** ALL **".
- From:** Date input field showing "2012-01-01" with a calendar icon.
- To:** Date input field showing "2020-07-09" with a calendar icon.
- Benchmark:** A button with a green plus icon and the text "Benchmark". Below it, a text input field contains "No benchmark".
- Group Code:** Dropdown menu showing "All items checked".
- Buttons:** "SEARCH" (orange), "DOWNLOAD" (orange), and "Clear Search" (grey).

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

This screenshot is identical to the previous one, but the "Product" dropdown menu, which currently displays "** ALL **", is highlighted with a red rectangular box to indicate it is the focus of this step.

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

This screenshot is identical to the previous ones, but the "Group Code" dropdown menu, which currently displays "All items checked", is highlighted with a red rectangular box to indicate it is the focus of this step.

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

TalentClick
Predict Strengths AND Risks.

Name: Product: **** ALL **** Report: **** ALL **** From: 2012-01-01 To: 2020-06-16

+ Benchmark Group Code: **SEARCH** **DOWNLOAD** Clear Search

☐ Group Code Last Name

No records to display.

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.

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

Select Benchmark for Fit Scores
✕

Benchmark Filter

Accounting and Finance

Accounting: AP/AR Clerk

Accounting-Auditor

Administration

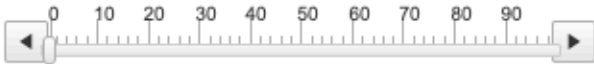
Assembler

115 row(s)

Companies

A - Test
▼

TC	WPP	WVA
TC	WPP	WVA
TC	WPP	WVA
TC	WPP	WVA
TC	SQ	WPP
		WVA



Minimum Fit Score: 0

Done

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

TalentClick
Predict Strengths AND Risks.

Assessments Invite Resources Analytics Settings Help Profile

Name: [] Product: [ALL] Report: [ALL] From: [2017-01-01] To: [2020-01-01]

+ Benchmark Customer Service Inc. ABC Co. INC.40 Group Code: [All Items checked] SEARCH DOWNLOAD Clear Search Search returned 32 reports

	Group Code	Last Name	First Name	Fit Score	Product	Report	Date	PDF	Report Builder
<input checked="" type="checkbox"/>	TEST38 - TalentClick - AWP CQ - Location A	Smith	CHARLES	100	Summary	Employee	07-Jul-2020		
<input type="checkbox"/>	TEST38 - TalentClick - AWP CQ - Location A	Klein	Bacori	97	Summary	Employee	07 Jul 2020		
<input checked="" type="checkbox"/>	TEST37 - TalentClick - AWP	Sample	Consuela	91	Summary	Employee	19-May-2020		
<input type="checkbox"/>	TEST38 - TalentClick - AWP CQ - Location A	Silva	Cory	89	Summary	Employee	07 Jul 2020		
<input checked="" type="checkbox"/>	TEST38 - TalentClick - AWP CQ - Location A	BAKER	Sija	89	Summary	Employee	07-Jul-2020		
<input type="checkbox"/>	TEST38 - TalentClick - AWP CQ - Location A	Silva	Leo	88	Summary	Employee	07 Jul 2020		

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.

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.



Report Builder

Jo Sample
Group: TEST37
2020-03-23

Reports: AVP Employer
Language: English

- ☒ Show Fit Scores
☐ Show Interview Questions
☒ Show Performance Management Tips

Detail Areas per Benchmark: 4



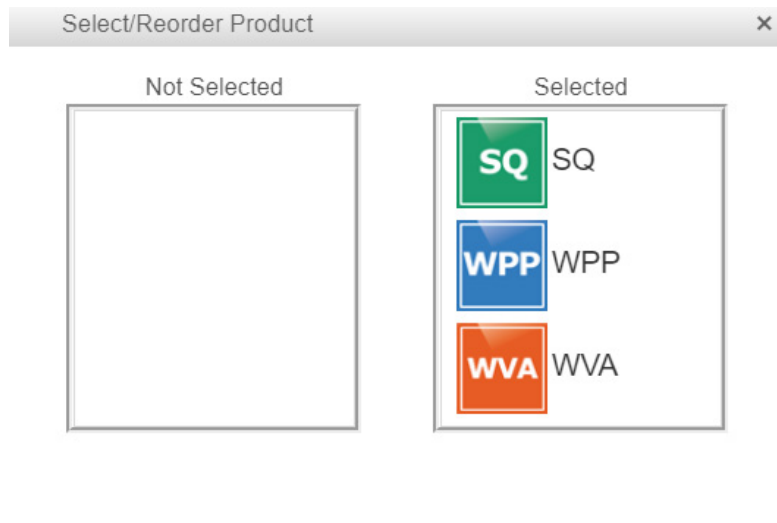
Benchmarks



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.

- 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.

Reports: AVP Interview

Language: English

Dimensions Per Benchmark: 4

☐ Show Fit Scores

+ Products

+ Benchmarks

Accounting: API/AR Clerk	X
Call Center Manager	X
Carpenter	X

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

Select Benchmark

Benchmark Filter

Companies

A - Test

Field Investigator	SQ	WPP	WVA
Health Care-Personal Attendant	SQ	WPP	WVA
Taxi Driver - LOW Performer	SQ	WPP	WVA
Accounting and Finance	TC	WPP	WVA
Accounting-Auditor	TC	WPP	WVA
Administration	TC	WPP	WVA
CEO	TC	WPP	WVA
92 row(s)			

Add Benchmark

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

TCT990_Sample Kelly_TCAVPEmployer_20200717-... 1 / 1

WORKSTYLE

Outgoing

Regimented

Reactive

LEFT SIDE

MID-LEFT

MID RANGE

MID-RIGHT

RIGHT SIDE

Non-Dominant

Contented

Dominant

Achievement-Focused

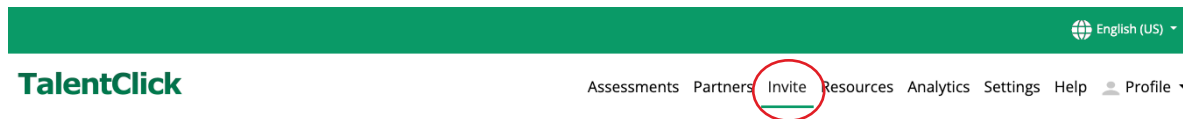
These are the most extreme scores from the personality profile:

Download

Print

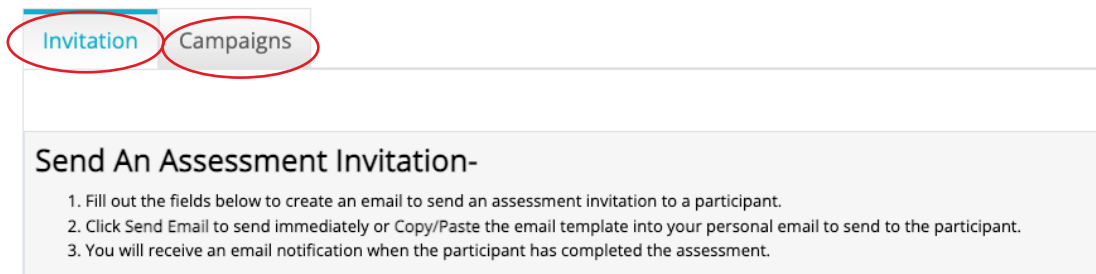
Sending Assessment Links

The **Invite** menu allows you send an email to candidates and employees, supplying them with an assessment URL and instructions to access the survey.



There are two ways to send invites:

1. **Invitation**
2. **Campaigns**



Invitation:

By selecting the '**Invitation**' option, you can share a universal assessment URL with one or several email recipients through an email message. This method is optimal for most situations when a participant needs to complete the assessment without constraints, such as URL expiration dates or limitations on the number of send attempts.

Campaigns:

A '**Campaign**' allows you to send participant invitations individually or in bulk via CSV file import, as well as establish assessment URL expiration dates, monitor participant progress, send reminder emails to those who haven't completed the assessment, and more. Each unique campaign link is generated for a specific participant and can only be used once.

Invite / Assessment Link

The “**Invitation**” tab enables you to send an email containing the generic assessment link for the survey to the participant (non-unique participant link).

1. Click on the “**Invite**” tab from the TalentClick home screen menu
2. Click on “**Invitation**” tab
3. Input the participant’s name and email address in the designated fields
4. Click on the “**Select Assessment**” pull down to choose the group code associated with the link you want to send

Send An Assessment Invitation-

1. Fill out the fields below to create an email to send an assessment invitation to a participant.
2. Click Send Email to send immediately or Copy/Paste the email template into your personal email to send to the participant.
3. You will receive an email notification when the participant has completed the assessment.

Participant Name:
(required)

Select Assessment:
(required)

TCT166 - Greg Ford - WPP WVA only link ▼

Assessment Url:

https://ca.talentclick.com

Participant Email:
(required)

CC List:
(Semicolon separated list)

BCC List:
(Semicolon separated list)

Email Subject:
(required)

Assessment Invitation

Advanced

Edit Email Template

Email Template

Hello {{User.Name}},

Welcome and thank you in advance for completing this personality and behavioral assessment!

5. Edit the Email Template if needed (Optional)
6. Click “**Send Email**”

Note: A different approach is to copy the “**Step 3**” link and paste it into a customized email directed at the participant. This allows for email formatting and inclusion of your company’s branding. Distributing the assessment link via your official company email minimizes the likelihood of it being flagged as spam.

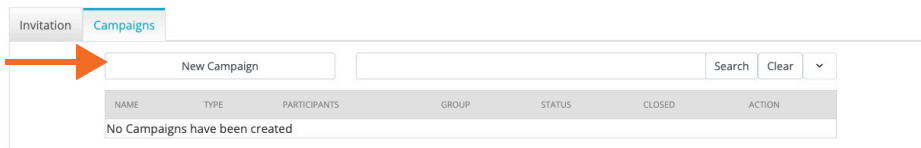
Invite / Campaign Manager

The **"Campaign"** tab allows you to distribute a survey assessment link via email to participants. You can create participant groups manually or import them through a CSV file, set expiration dates for the assessment URL, track progress, send reminder emails to incomplete participants, and more. The unique, single-use links generated help to prevent duplicate entries.

1. Click on the **"Invite"** tab from the TalentClick home screen menu
2. Click on **"Campaign"** tab

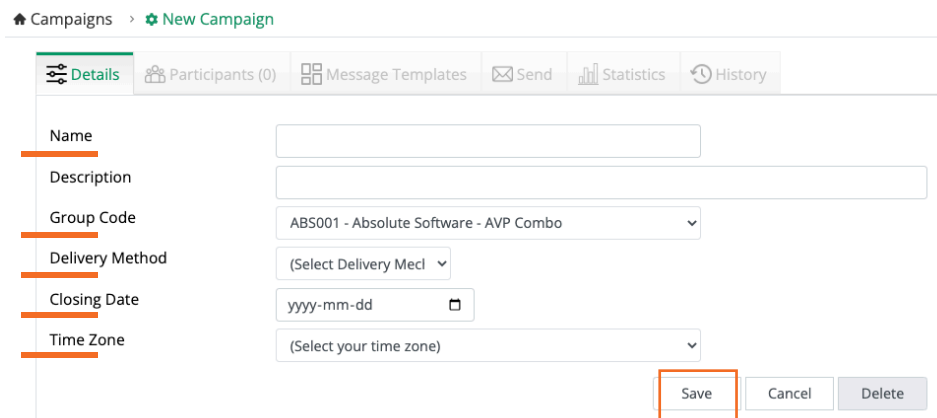
Creating a New Campaign

1. Click on **"New Campaign"**



The screenshot shows the 'Campaigns' tab selected. An orange arrow points to the 'New Campaign' button. Below the button is a table with columns: NAME, TYPE, PARTICIPANTS, GROUP, STATUS, CLOSED, and ACTION. The table is currently empty, displaying 'No Campaigns have been created'.

2. Enter Campaign details (Name, Description, Group Code, Delivery Method, Closing Date, and Time Zone)

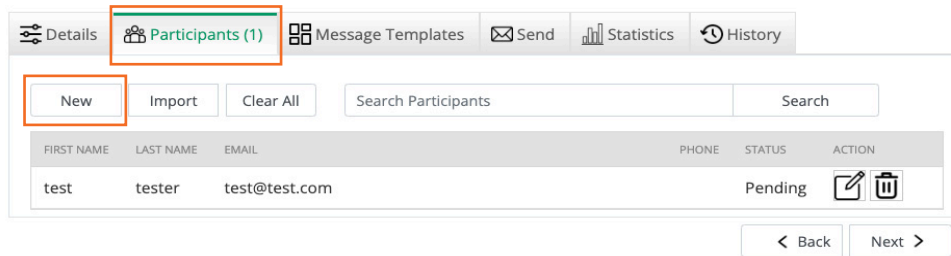


The screenshot shows the 'New Campaign' form. The 'Details' tab is selected. Fields include: Name, Description, Group Code (dropdown), Delivery Method (dropdown), Closing Date (calendar), and Time Zone (dropdown). The 'Save' button is highlighted with an orange box.

3. Click **"Save"**
4. Click **"Next"**

Adding Participants

5. On the **"Participants"** tab select **"New"** to manually add the participant details OR select **"Import"** to upload a CSV file of email addresses.





The screenshot shows the 'Participants' tab selected. The 'New' button is highlighted with an orange box. Below the buttons is a table with columns: FIRST NAME, LAST NAME, EMAIL, PHONE, STATUS, and ACTION. The table contains one entry: test, tester, test@test.com, Pending. The 'Back' and 'Next' buttons are at the bottom.

Note: CSV Import files require: first name, last name, and email addresses to import successfully. Ensure you don't have duplicate email addresses in your import. If duplicate email addresses exist on the same campaign, the duplicate will be ignored. CSV column labels or headers are not needed.

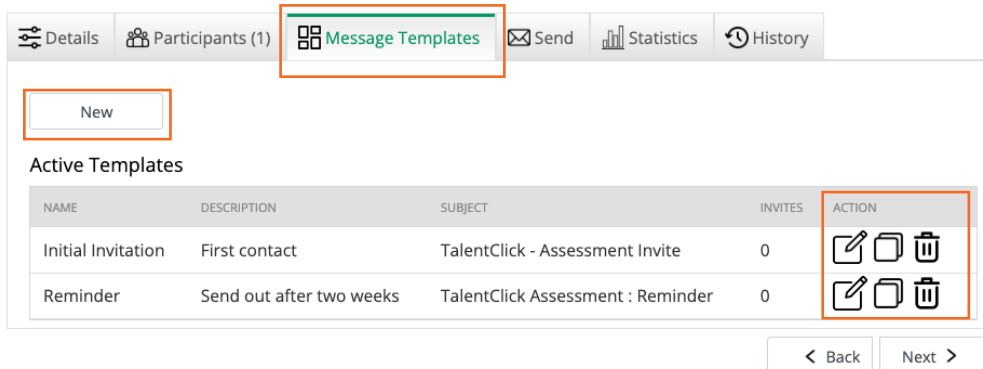
- Click **"Next"** when you are finished importing your CSV file or manually entering your participant information.







Editing Participants in a Campaign (Action buttons)

On the participants tab you can use the "Action" buttons to perform various actions.

- Use the  Action button to edit the participant name and email address and view the unique URL assigned to the participant. Click "Save" to update the changes
- Use the  Action button to delete the participant entry.
- For large participant lists you can use the bar to locate a specific participant on your campaign list.
- "Clear All" will remove all the participants and data from your campaign.

- Message Templates:** Create new email templates or use the existing templates






NAME	DESCRIPTION	SUBJECT	INVITES	ACTION
Initial Invitation	First contact	TalentClick - Assessment Invite	0	  
Reminder	Send out after two weeks	TalentClick Assessment : Reminder	0	  

Note: Action Buttons are used to edit, copy, or delete message templates.

Creating or Editing a Message Template (Action buttons)

Click **"New"** to create a message template from scratch, **OR:**

- Use the  Action button to **edit** the existing Message Template
- Use the  Action button to **copy** the existing Message Template
- Use the  Action button to **delete** the existing Message Template

Creating or Editing Message Templates

New

Active Templates

NAME	DESCRIPTION	SUBJECT	INVITES	ACTION
Initial Invitation	First contact	TalentClick - Assessment Invite	0	

Name Initial Invitation

Description First contact

Subject TalentClick - Assessment Invite

Body

Use the following placeholders to create the template:

- {firstname}
- {lastname}
- {uniqueLink}

Hi {firstname} {lastname},

Welcome and thank you in advance for completing this personality and behavioral assessment.

Click on the link below to begin the assessment and be sure to read the instructions carefully:

{uniqueLink}

Save Preview Cancel

- Input or update the **"Name"** and **"Description"** for your own tracking purposes
 - Input or update the **"Subject"** line for the email participants
 - Compose or edit the primary message in the **"Body"** section of the template. Employ placeholder tags to merge elements like "{Firstname}" and "{Lastname}." The placeholder tags can be copied by clicking button and pasted into the body
- Note:** Make sure to employ the placeholder tag for **"{Unique Link}"** or the Assessment URL will not be included in the email
- Utilize the formatting bar for basic message styling. Use the **"Preview"** button to ensure proper appearance
 - Press **"Save"**

Repeat as needed for remaining templates. Click Next to advance to the **"Send"** tab.

Sending the Email

- On the **"Send"** tab, click **"Schedule Message"** to compile the items to email to candidates or employees. This step combines the link details, participants and message templates.

The screenshot shows the 'Send' tab selected in the top navigation bar. Below the navigation bar, there is a 'Schedule Message' button. Below this button is a table with the following data:

EMAIL TEMPLATE	STATUS	SEND DATE	RECIPIENTS	ACTION
Initial Invitation	Scheduled	2023-05-04	1	

At the bottom right of the interface, there are 'Back' and 'Next' buttons.

- Select the type of Invitation you want to use. For the first email select "Initial Invitation."

Note: Message Templates you created or edited in the previous step will be available in the "Select Template" pulldown menu.

The screenshot shows the 'Schedule Message' form. The fields are as follows:

- Select Template:** Initial Invitation (dropdown menu)
- Schedule:** Set Schedule (dropdown menu)
- Send Date/Time:** 2023-05-04, 12:00 PM (calendar icon)
- Recipients:** Not Started or Partially Complete (dropdown menu)

At the bottom right, there are 'Save' and 'Cancel' buttons.

Set a **Schedule** or **"Send Now"**

Select the **Recipient** group

- Click **"Save."** If the schedule date and time is in the future then the email will be held and scheduled for that date and time.

Scheduling and sending a "Reminder" email

- Click **"Schedule Message"**

The screenshot shows the 'Schedule Message' form with the following fields:

- Select Template:** Reminder (dropdown menu)
- Schedule:** Set Schedule (dropdown menu)
- Send Date/Time:** 2023-05-04, 12:00 PM (calendar icon)
- Recipients:** Not Started or Partially Complete (dropdown menu)

At the bottom right, there are 'Save' and 'Cancel' buttons.







- **Select Template:** “Reminder” (or a reminder template you created on the Message Template tab)
- **Set a Schedule:** With a future date before the expiry of your assessment url link.
- **Recipients:** select “Not Started or Not Completed”. Ideally you would only want to send participant reminders to those who have not yet completed the assessment.
- You can send as many reminders you feel is appropriate during the campaign. It’s recommended that you have at least one reminder email a couple days before the end date of your campaign. This will increase your campaign response rates.

12. Click “Send”: Your email will be scheduled according to your preference. The Send status of each email will be displayed on the “Send” tab.

Campaigns > TC Sample Test

Details Participants (12) Message Templates **Send** Statistics

Schedule Message

EMAIL TEMPLATE	STATUS	SEND DATE	RECIPIENTS	ACTION
Initial Email (Copy)	Sent	2023-04-26	12	  
Reminder	Scheduled	2023-06-01	12	  







< Back

Adding/removing participants to your existing campaign

1. Navigate to the list of campaigns and click the “**Edit**” Action button for the campaign you want to add participants to.
2. Click on the **Participants** tab
3. Use “New” to manually add participants or “**Import**” to use CSV import.
4. Move to the “Send” Tab. You will see the invitations sent or scheduled

Details Participants (12) Message Templates **Send** Statistics

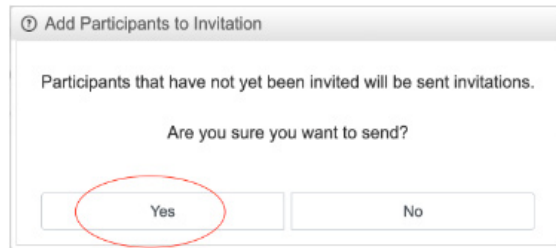
Schedule Message

EMAIL TEMPLATE	STATUS	SEND DATE	RECIPIENTS	ACTION
Initial Email (Copy)	Sent	2023-04-26	12	  
Reminder	Scheduled	2023-06-01	12	  

< Back

5. Click on “**Add participants**” action button ()

- Click **"Yes"** to confirm you want to send the Invitation to participants who have not been invited. This will send an invitation to the newly added participants and the recipient count will change on the **"Send"** tab.



Statistics - Reviewing mail delivery statistics

Mail delivery statistics offer a campaign overview that provides relevant insights on recipients and their evaluation status. This summary enables organizations to better gauge the effectiveness of their outreach and improve future campaigns accordingly.

Assessment Summary

- No.Participants:** Total participants included in the campaign
- Started:** Participants who have clicked the assessment URL but not completed the assessment
- Completed:** Participants who have finished the assessment and submitted their results upon survey completion.

Message Summary

- Delivered:** Number of participants whose email host has accepted the email message
- Bounced:** Number of participants whose email host has not identified the intended email address or the email host does not exist.

Note: Please note that email services used outside the TalentClick infrastructure may affect the accuracy of reported values for these services.

History - Viewing the email log

The **"History"** tab displays the email history of the campaign, including every participant email's status and message. It even allows convenient filtering by **"email status,"** and provides options for exporting the entire log or just the filtered results by status.

Details

Participants (12)

Message Templates

Send

Statistics

History

Message Template

(All Templates)

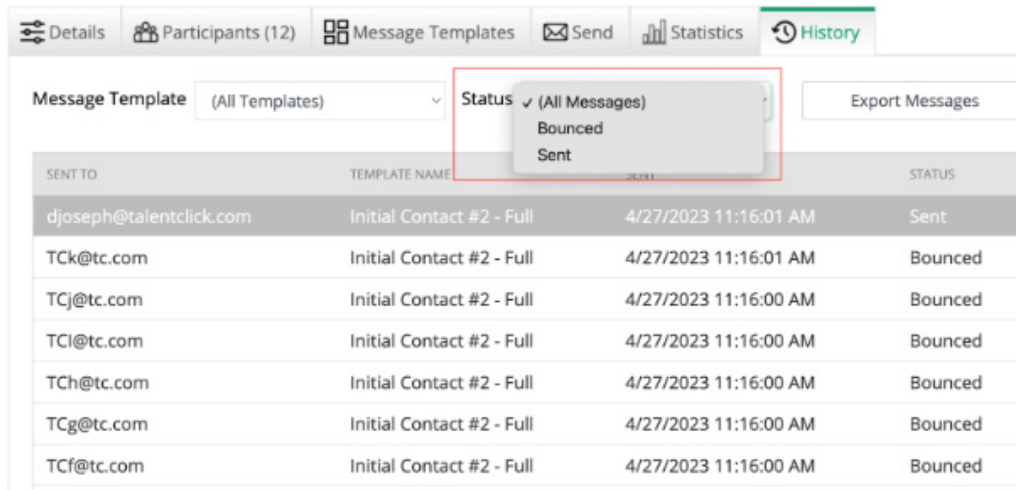
Status

(All Messages)

Export Messages

SENT TO	TEMPLATE NAME	SENT	STATUS
djoseph@talentclick.com	Initial Contact #2 - Full	4/27/2023 11:16:01 AM	Sent
TCk@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:01 AM	Bounced
TCj@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCi@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCh@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCg@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCf@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced

To Filter by **"Status"**: Click on the Status pulldown menu and select the item to filter.

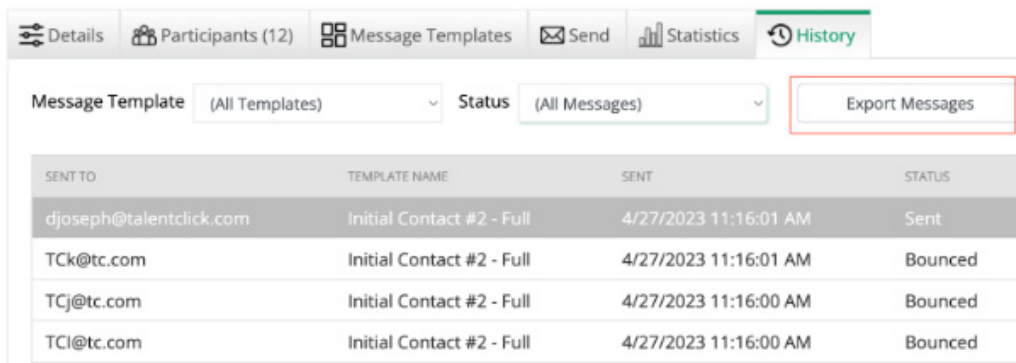


Details Participants (12) Message Templates Send Statistics History

Message Template (All Templates) Status (All Messages) Export Messages

SENT TO	TEMPLATE NAME	SENT	STATUS
djoseph@talentclick.com	Initial Contact #2 - Full	4/27/2023 11:16:01 AM	Sent
TCk@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:01 AM	Bounced
TCj@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCI@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCh@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCg@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCf@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced

To Export Message: Click the **"Export Message"** button to generate a CSV file automatically.

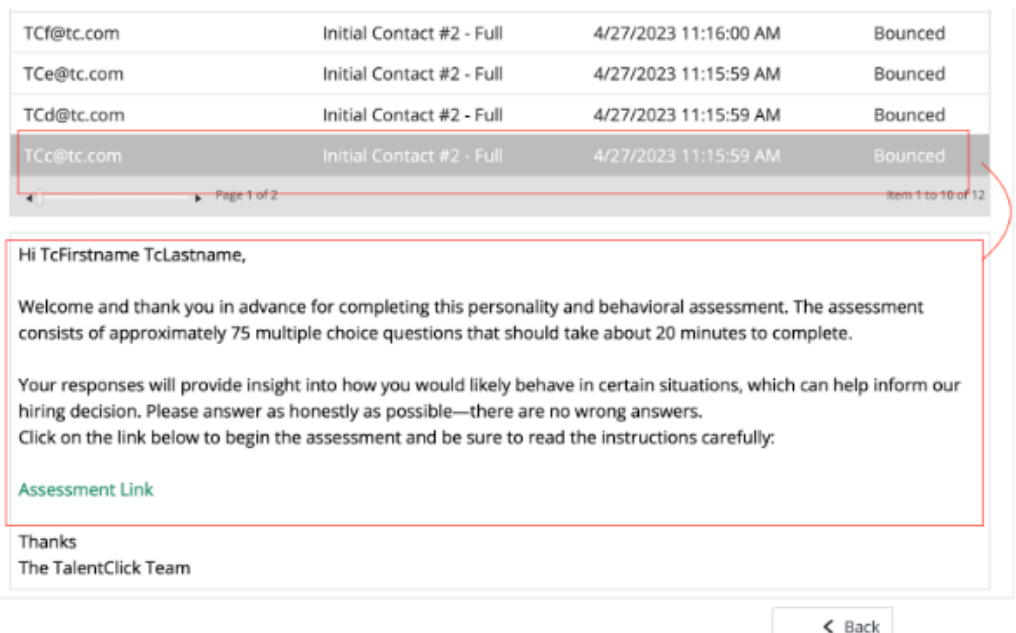


Details Participants (12) Message Templates Send Statistics History

Message Template (All Templates) Status (All Messages) Export Messages

SENT TO	TEMPLATE NAME	SENT	STATUS
djoseph@talentclick.com	Initial Contact #2 - Full	4/27/2023 11:16:01 AM	Sent
TCk@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:01 AM	Bounced
TCj@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCI@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced

To **view the email message content** for participants: scroll to the bottom of the History page list.



SENT TO	TEMPLATE NAME	SENT	STATUS
TCf@tc.com	Initial Contact #2 - Full	4/27/2023 11:16:00 AM	Bounced
TCe@tc.com	Initial Contact #2 - Full	4/27/2023 11:15:59 AM	Bounced
TCd@tc.com	Initial Contact #2 - Full	4/27/2023 11:15:59 AM	Bounced
TCc@tc.com	Initial Contact #2 - Full	4/27/2023 11:15:59 AM	Bounced

Page 1 of 2 Item 1 to 10 of 12

Hi TcFirstname TcLastname,

Welcome and thank you in advance for completing this personality and behavioral assessment. The assessment consists of approximately 75 multiple choice questions that should take about 20 minutes to complete.


Your responses will provide insight into how you would likely behave in certain situations, which can help inform our hiring decision. Please answer as honestly as possible—there are no wrong answers. Click on the link below to begin the assessment and be sure to read the instructions carefully:

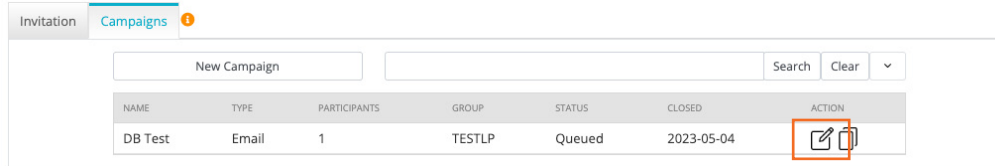
[Assessment Link](#)



Thanks
The TalentClick Team

< Back

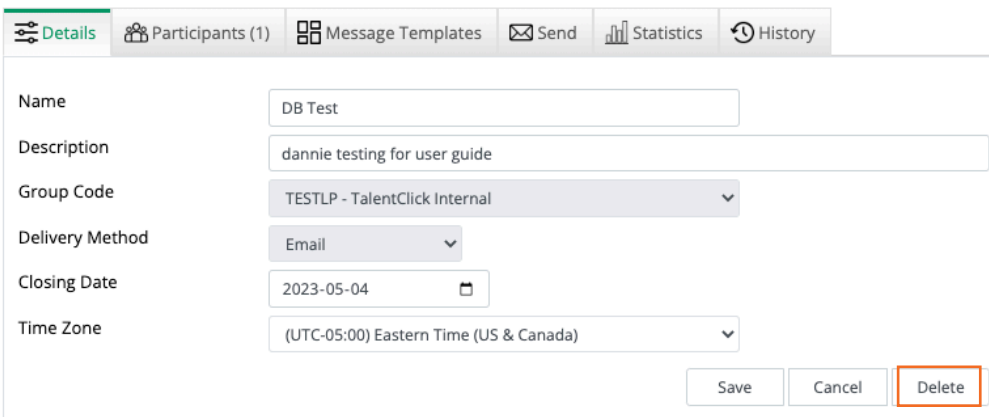
How to Delete a Campaign

1. Navigate to the Campaigns tab
2. Click the  Action button to edit the campaign



NAME	TYPE	PARTICIPANTS	GROUP	STATUS	CLOSED	ACTION
DB Test	Email	1	TESTLP	Queued	2023-05-04	 

3. Click **"Delete"**



Details | Participants (1) | Message Templates | Send | Statistics | History

Name: DB Test

Description: dannie testing for user guide

Group Code: TESTLP - TalentClick Internal


Delivery Method: Email

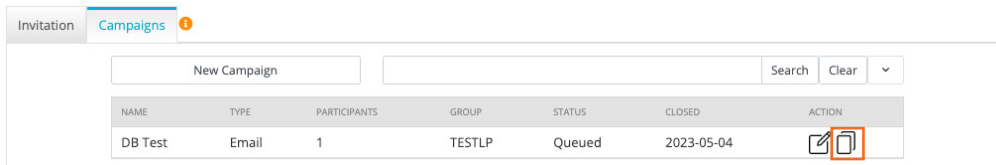
Closing Date: 2023-05-04



Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Save Cancel **Delete**

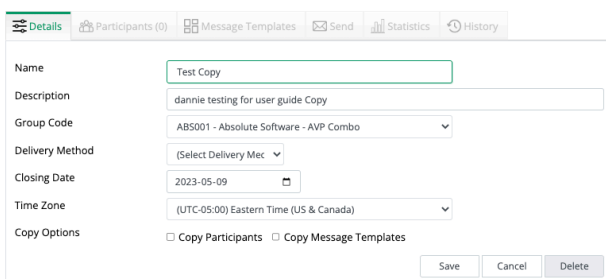
How to Copy a Campaign

1. Navigate to the Campaigns tab
2. Click the  Action button to edit the campaign



NAME	TYPE	PARTICIPANTS	GROUP	STATUS	CLOSED	ACTION
DB Test	Email	1	TESTLP	Queued	2023-05-04	 

3. Configure the newly copied campaign details:



Details | Participants (0) | Message Templates | Send | Statistics | History

Name: Test Copy

Description: dannie testing for user guide Copy

Group Code: ABS001 - Absolute Software - AVP Combo

Delivery Method: (Select Delivery Mec)

Closing Date: 2023-05-09

Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Copy Options: ☐ Copy Participants ☐ Copy Message Templates

Save Cancel Delete

Name: Provide a new name for the campaign
Description: New description of the campaign (Optional)
Group Code: Select the group code for the new campaign or use the one copied
Delivery Method: Email or SMS
Closing Date: Select a closing date for the new campaign
Time Zone: Choose your time zone used for scheduling email sendouts and closing
***Copy Options:** Option to select **"Copy the Participants"** or **"Copy Message templates"** from the original campaign

4. Click **"Save"**

Note: If you did not select to copy participants or Message Templates you can proceed to adding participants, editing Message Templates, then Sending the Invitation.

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.

The screenshot displays the TalentClick portal interface. At the top, there is a navigation bar with tabs: Back, My Account, Users, Companies, Group Codes, Reports, and Profile. Below this, a search bar and a dropdown menu for 'Companies' (set to 'All companies') are visible. The main content area shows the profile of a user named 'Test, Demotwo (demo2@gmail1.com)'. The profile is categorized as a 'Primary User' with ID 1872. Fields for editing include First Name (Demotwo), Last Name (Test), Company (Test Company for Demo), Level (Administrator), Email (demo2@gmail1.com), Divisions, and Type (Customer). There are also buttons for 'Show' and 'Cancel' at the bottom of the profile section.

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

TalentClick
Predict Strengths AND Risks.

Back My Account Users Companies Group Codes Reports Profile +

Search Users: Companies: All companies Enabled Users Suspended Users Find

Test Company for Demo
Test, Demotwo (demo2@gmail.com)

Profile Password Permissions Groups & Units Notifications SPANERS

ENABLE	PRIVILEGE	DESCRIPTION
<input type="checkbox"/>	Suspended	Suspended from system use
<input checked="" type="checkbox"/>	Analytics	Enable use of Analytics
<input type="checkbox"/>	Settings	Enable use of Settings functions

Report Types Product Types

☒ Employer
☒ Participant

☐ AVP Combo
☐ AVP Interview
☒ DSQ
☒ Leadership Profile
☒ SQ
☒ Summary

Save Cancel

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

TalentClick
Predict Strengths AND Risks.

Back My Account Users Companies Group Codes Reports Profile +

Search Users: Companies: All companies Enabled Users Suspended Users Find

Test Company for Demo
Test, Demotwo (demo2@gmail.com)

Profile Password Permissions Groups & Units Notifications SPANERS

Groups

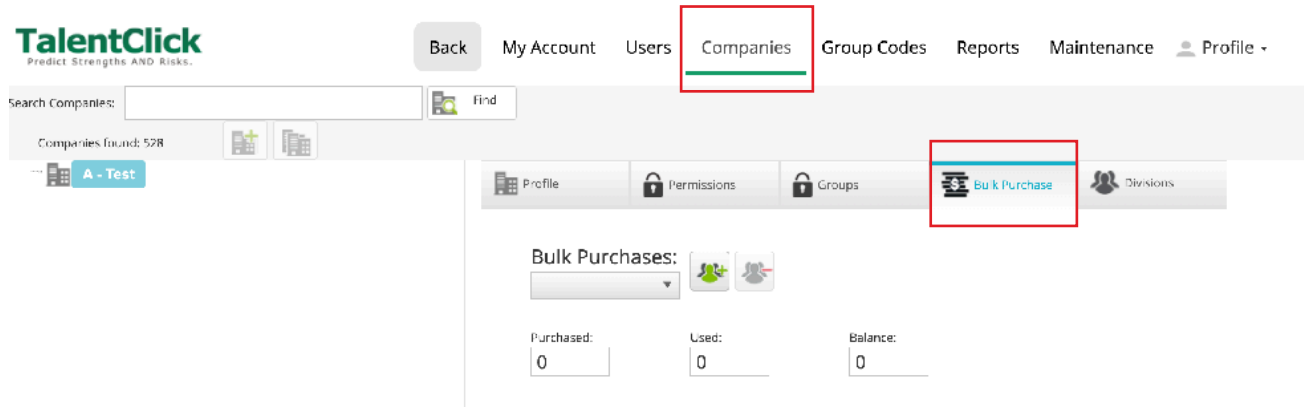
VIEW	GROUP	DESCRIPTION	PRODUCT
<input checked="" type="checkbox"/>	TEST17	TEST17 - TalentClick - AVP	AVP Combo, AVP Interview, DSQ, SQ, Summary
<input checked="" type="checkbox"/>	TEST18	TEST18 - TalentClick - AVP - Location A	Summary

Save Cancel

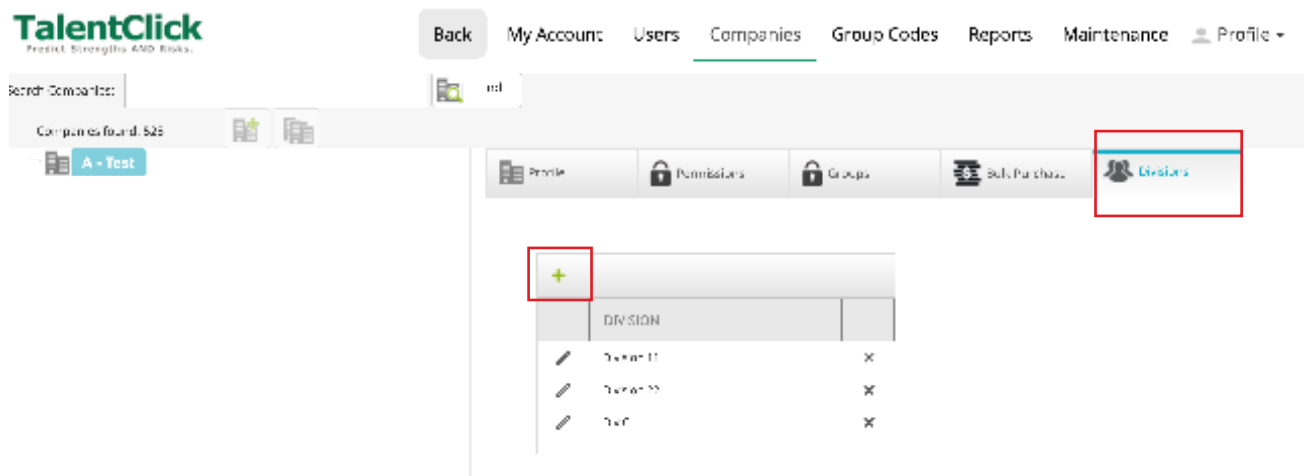
Links

SURVEY URL	DESCRIPTION
No records to display.	

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



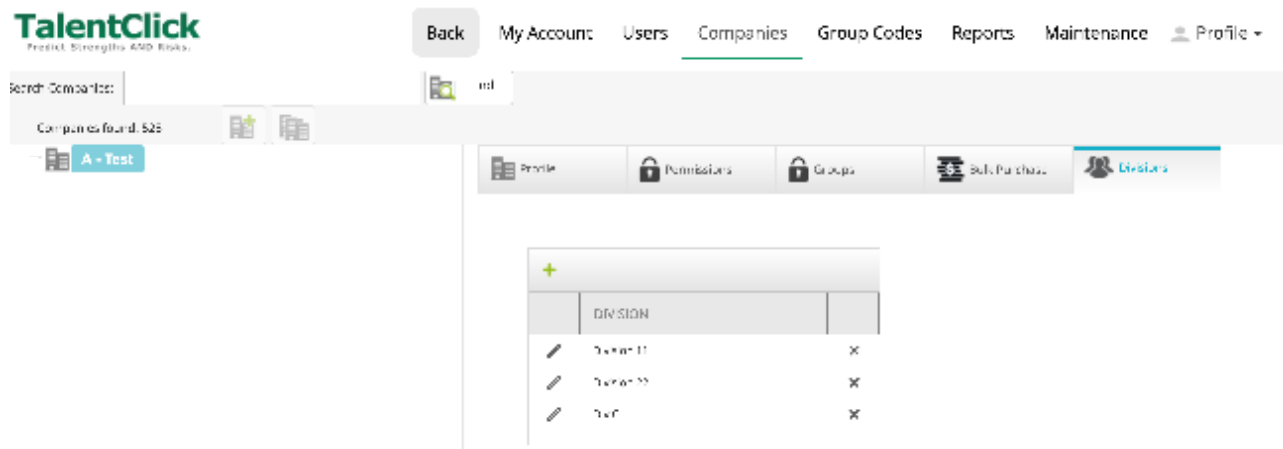
Divisions: Lists any Divisions that have been created. Administrator can create Divisions and assign them to Users.



Creating Company Divisions (Administrator)

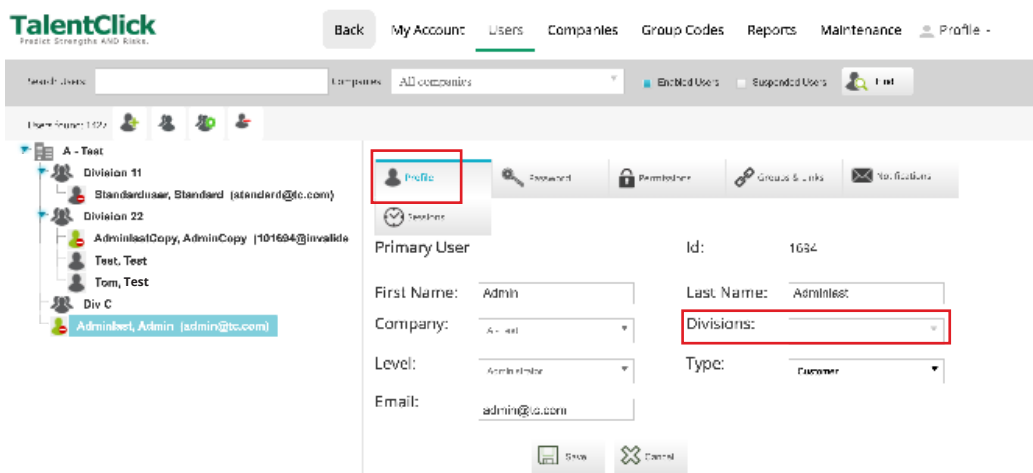
“Divisions” are a subgroup within a Company record. Its an effective way to create internal company groups that you can assign to users. Divisions can be used for company locations, departments, or by job role - etc.

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.



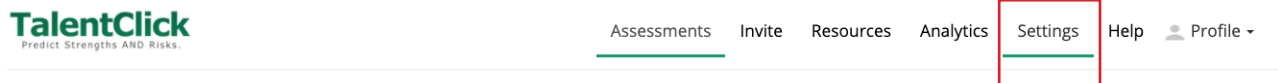
Assign Users to Divisions (Administrator)

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



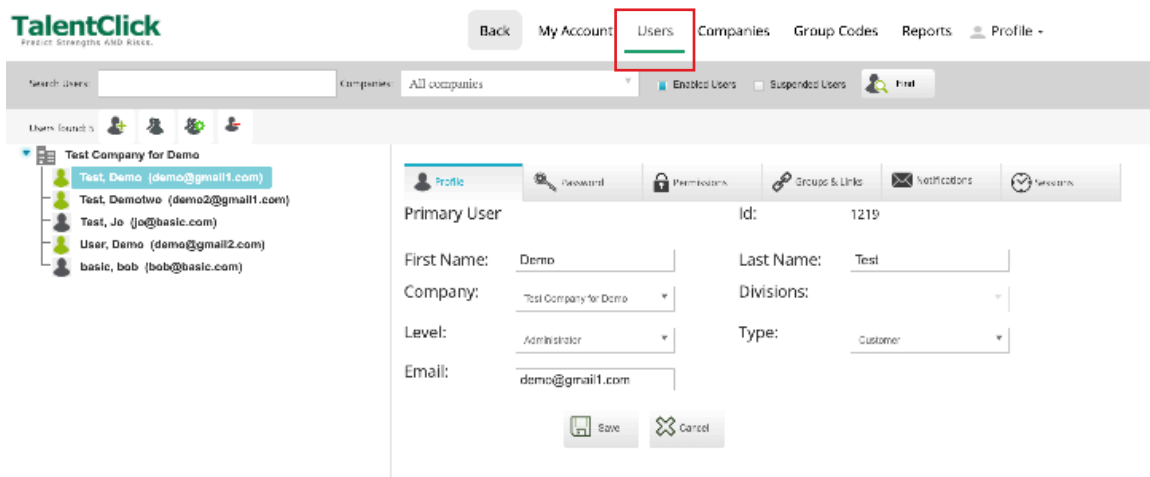
Settings - Users

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:

The screenshot shows the TalentClick user management interface. On the left, a tree view shows the organizational structure with 'A - Test' selected. The main area displays the 'Profile' tab for a 'Standard User'. The user's details are as follows:

Field	Value
Primary User	Id: 1634
First Name	Admin
Last Name	AdminTest
Company	A - test
Divisions	[Dropdown menu]
Level	Admin member
Type	Customer
Email	admin@cs.com

Buttons at the bottom include 'Save' and 'Cancel'.

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)

This screenshot is similar to the one above but highlights the configuration tabs for the 'Standard User'. The tabs are: 'Profile', 'Permissions', 'Group & Links', and 'No. Notifications'. The 'Profile' tab is currently selected, showing the same user details as the previous screenshot.

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

The screenshot shows the 'Password' tab selected in the user profile menu. On the left, a list of users is shown under 'Test Company for Demo'. The main area contains fields for 'New Password:' and 'Confirm Password:', followed by a 'Save' button.

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

The screenshot shows the 'Permissions' tab selected in the user profile menu. It displays a table of permissions and two sections for report and product types.

ENABLE	PRIVILEGE	DESCRIPTION
<input type="checkbox"/>	Suspended	Suspended from system use
<input checked="" type="checkbox"/>	Analytics	Enable use of Analytics
<input checked="" type="checkbox"/>	Settings	Enable use of Settings functions

Report Types	Product Types
<input checked="" type="checkbox"/> Employer	<input type="checkbox"/> I-WVP Combo
<input checked="" type="checkbox"/> Participant	<input type="checkbox"/> I-WVP Interview
	<input checked="" type="checkbox"/> DSQ
	<input checked="" type="checkbox"/> Leadership Profile
	<input checked="" type="checkbox"/> DSQ

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

Groups

VIEW	GROUP	DESCRIPTION	PRODUCT
<input checked="" type="checkbox"/>	TEST32	TEST32 - TalentClick - AWP	AWP Combo, AWP Interview, AWP, SQ, Summary
<input checked="" type="checkbox"/>	TEST33	TEST33 - TalentClick - AWP, SQ - Location A	Summary

Links

	SURVEY URL	DESCRIPTION	
	https://www.talentclick.com/invite/invite32	AWP SQ (SQ WFP WAK SQ) - Location A	Details
	https://www.talentclick.com/invite/invite33	AWP Interview (SQ WFP WAK)	Details

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.

Notifications

Group Codes: TEST32 (TEST32 - TalentClick - AWP) | Products: ALL

Email	Group Code	Product	Report
	TEST32 (TEST32 - TalentClick - AWP)	AWP Combo	Employer
	TEST32 (TEST32 - TalentClick - AWP)	AWP Interview	Employer
	TEST32 (TEST32 - TalentClick - AWP)	Summary	Employer

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

Sessions

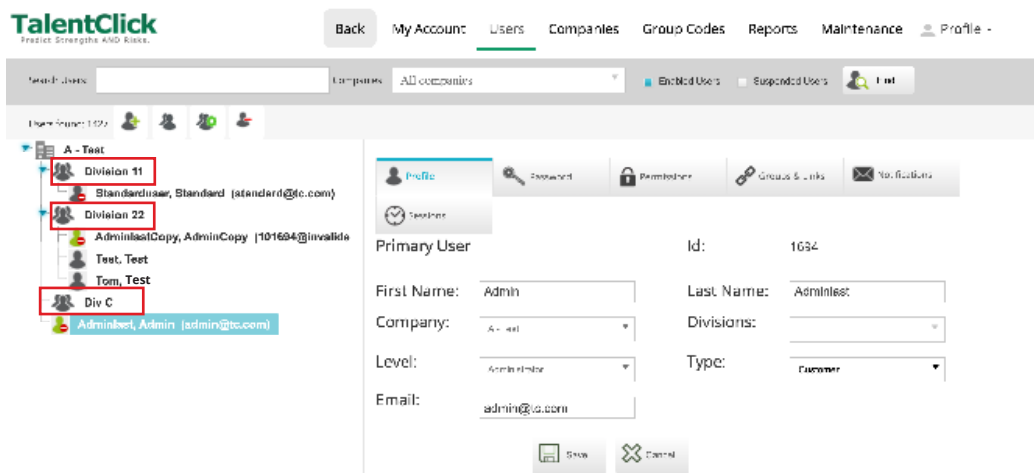
LOGGED IN	LOGGED OUT	DURATION	IP ADDRESS
Tue 07-Jul-2020 21:17	???	???	24.57.2.128
Tue 07-Jul-2020 21:09	Tue 07-Jul-2020 21:11	00:02:00	24.57.2.128
Tue 07-Jul-2020 21:01	Tue 07-Jul-2020 21:01	00:00:00	24.57.2.128
Fri 03-Jul-2020 21:59	Sat 04-Jul-2020 00:15	02:17:00	24.57.2.128
Fri 03-Jul-2020 21:39	???	???	24.57.2.128

Viewing Divisions 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.
6. Then click **"Save"**

Note: If you need to create new Company "Divisions" see section "How to create Divisions" (Administrator) in this guide.

Note: You will be prompted to "Send user link" to set their "Password"- Click ok to send or 'Cancel' to send later.

The screenshot shows the TalentClick portal interface. At the top, there's a navigation bar with 'Back', 'My Account', 'Users', 'Companies', 'Group Codes', 'Reports', 'Maintenance', and 'Profile'. Below this is a search bar and a dropdown for 'Companies' set to 'All companies'. On the left, there's a tree view of 'Users' with 'A - Test' expanded, showing 'Division 11', 'Division 22', and 'Div C'. The 'Profile' tab is selected, showing a form for a new user. The form has fields for 'First Name' (Admin), 'Last Name' (Admin), 'Company' (A - test), 'Level' (Admin role), 'Email' (admin@tc.com), and 'Divisions' (selected). The 'Type' is set to 'Customer'. The 'Id' is 1634. There are 'Save' and 'Cancel' buttons at the bottom.

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

If you did not click 'OK' to send the user a password reset link in the previous step, you can click on the "Password" tab for the user to set a password.

Note: The user can click "Set a Password" or Reset a password at the login page anytime (See section: "How to Access the TalentClick Portal" of this guide for more details)

The screenshot shows the 'Password' tab selected in the user profile. It displays a button labeled 'Email link to user to create new password.' and a 'Send' button.

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"



ENABLE	PRIVILEGE	DESCRIPTION
<input type="checkbox"/>	Suspended	Suspended from system use
<input checked="" type="checkbox"/>	Analytics	Enable use of Analytics
<input checked="" type="checkbox"/>	Settings	Enable use of Settings functions

Report Types	Product Types
<input checked="" type="checkbox"/> Employer	<input checked="" type="checkbox"/> AVP Combo
<input checked="" type="checkbox"/> Participant	<input checked="" type="checkbox"/> AVP Interview
	<input checked="" type="checkbox"/> DSQ
	<input checked="" type="checkbox"/> Leadership Profile
	<input checked="" type="checkbox"/> SQ
	<input checked="" type="checkbox"/> Summary

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.

Groups

VIEW	GROUP	DESCRIPTION	PRODUCT
<input checked="" type="checkbox"/>	TEST37	TEST37 - TalentClick - AVP	AVP Combo, AVP Interview, ESQ, SQ Summary
<input checked="" type="checkbox"/>	TEST38	TEST38 - TalentClick - AVP CO - Location A	Summary

Links

SURVEY URL	DESCRIPTION	
https://assessment.talentclick.com/Group/Test37	AVP CO (SQ WFP WSA CO) - Location A	Delete
https://assessment.talentclick.com/Test37/Test37/1557-gfdaa287	AVP Link (SQ WFP WSA)	Delete

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)

Group Codes
TEST37 (TEST37 - TalentClick - AVP)

Products
ALL

Email	Group Code	Product	Report
<input type="checkbox"/>	TEST37 (TEST37 - TalentClick - AVP)	AVP Combo	Employer
<input type="checkbox"/>	TEST37 (TEST37 - TalentClick - AVP)	AVP Interview	Employer
<input type="checkbox"/>	TEST37 (TEST37 - TalentClick - AVP)	Summary	Employer

Copying settings from Existing user to another user (Administrator)

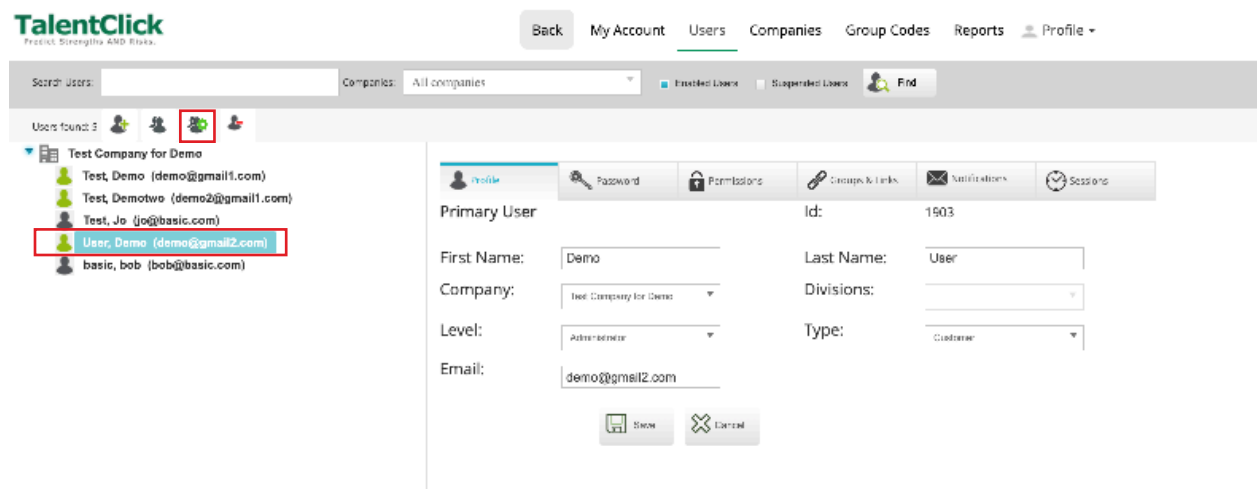
This feature allows the Administrator to copy an existing user's settings and append (or overwrite) to another user if they have similar permissions. This will save time from having to manually edit each user configuration changes.

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"


☐ Copy Settings to Existing User


Select a user from Test Company for Demo to assign settings from Demo User and then click the Copy button.


 Find


☐ Overwrite all original settings

 Test, Demo (demo@gmail1.com)

 Test, Demotwo (demo2@gmail1.com)

 Test, Jo (jo@basic.com)

 basic, bob (bob@basic.com)

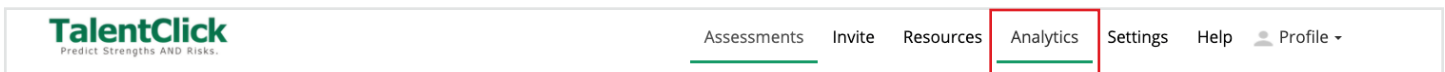
 Copy

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'

The screenshot shows a 'Create New Report' dialog box. It has a title bar with a checkbox and the text 'Create New Report'. Inside the dialog, there are two fields: 'Name:' with a text input containing 'Test Report', and 'Product:' with a dropdown menu showing 'DSQ'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a yellow background.

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

The screenshot shows the TalentClick portal interface. On the left sidebar, under the 'Teams' section, the 'Add Team' button is highlighted in yellow. The main content area displays a 'DSQ Team Report' for the date 2018-Dec-18 17:56. The report includes a table with columns for 'LEFT SIDE', 'MID RANGE', and 'RIGHT SIDE'. The 'LEFT SIDE' column contains the text 'Resistant' and a description: 'Questions existing rules and processes, may be resistant to feedback.' The 'RIGHT SIDE' column contains the text 'Accommodating' and a description: 'Follows rules and processes without questioning.'

5. Add Team name

The screenshot shows a 'Create New Team' dialog box. It contains a text input field with the text 'Test Team TC'. Below the input field are 'OK' and 'Cancel' buttons. The dialog box also includes a close button (X) in the top right corner.

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

The screenshot shows the TalentClick portal interface. On the left sidebar, under the 'Teams' section, the 'Add Member' button is highlighted in yellow. The main content area displays a table with columns for 'NAME', 'DATE', and 'GROUP'. The table is currently empty, and a message at the bottom states 'No records to display.'

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

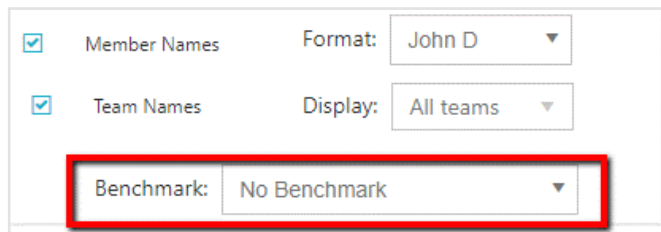
The screenshot shows a 'Search Assessments for Test Report (DSQ)' dialog box. It contains a search input field with the text 'test'. Below the input field are 'From' and 'To' date pickers, and a 'Groups' dropdown menu. A 'Find' button is located to the right of the search input field. Below the search criteria is a table with columns for 'NAME', 'DATE', 'GROUP', and 'ID'. The table contains three rows of data:

NAME	DATE	GROUP	ID
Test5575, Test5575	2018-12-07	ICS001	127
Test5575, Test5575	2018-12-12	ICS003	144
Test5575_2, Test5575_2	2018-12-10	ICS001	134

Below the table, it says 'Found 3 assessments'. At the bottom of the dialog box, there is a message 'Select assessments, search again or close' and an 'Add' button.

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.



The screenshot shows a configuration panel with three rows of settings:

- ☒ Member Names Format: John D ▼
- ☒ Team Names Display: All teams ▼
- ☒ Benchmark: No Benchmark ▼

The 'Benchmark' row is highlighted with a red rectangular box.

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

The screenshot displays the TalentClick portal's 'Usage Report' section. The navigation bar at the top includes 'TC Analytics', 'Home', 'Team Reports', 'Benchmark', and 'Usage' (which is the active tab). Below the navigation bar, the 'Usage Report' header is visible. On the left side, there are several filter parameters: 'Unique Responses' (with a toggle switch turned on), 'Number of Participants', 'Report' (a dropdown menu currently showing 'Summary'), 'Products' (a dropdown menu currently showing 'All Products'), 'Payment' (a dropdown menu currently showing 'All Payment Type'), 'Period' (a dropdown menu currently showing 'Totals'), 'Date Range' (a dropdown menu currently showing 'This Month'), and 'Companies' (a search bar with a magnifying glass icon). The main content area on the right is titled 'Select Companies and press "Generate Report" button'.

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

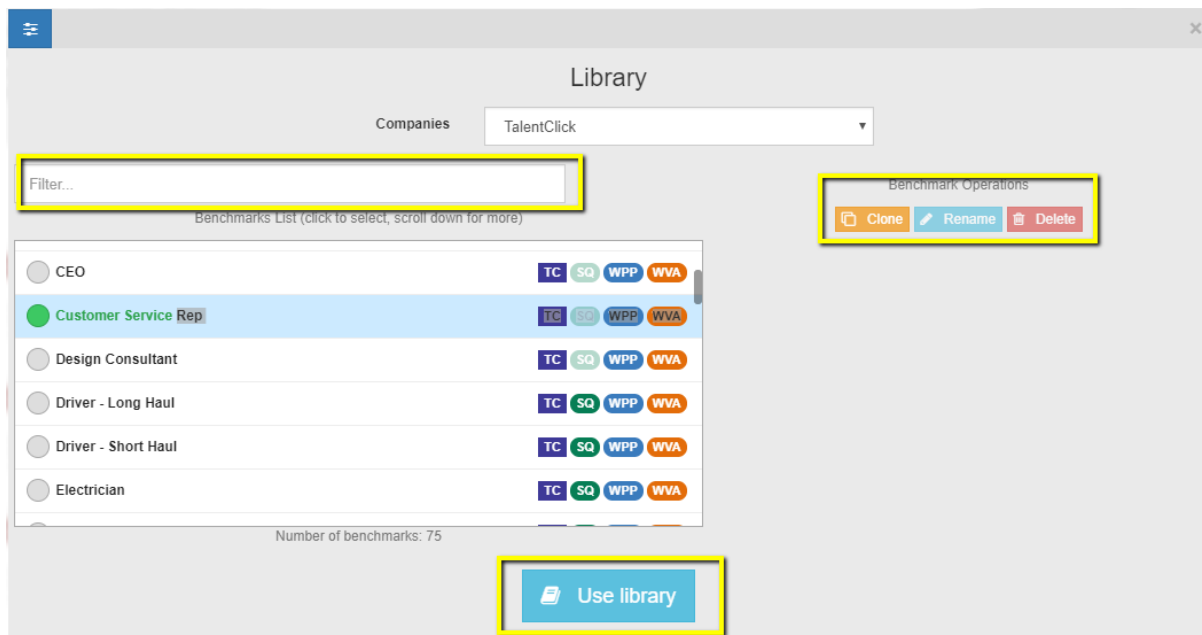
Benchmarks

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

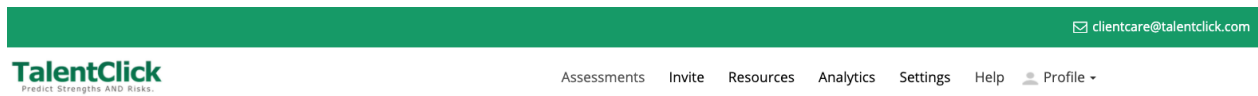


Note: If you'd like to have specific Benchmark ranges to appear on all your Assessment Reports please contact us to discuss details. We can customize Benchmark ranges to be based on data specific to your team or organization. (support@talentclick.com)

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**



How Can We Help You?

We will get back to you as quickly as we can (within 1 business day) to answer any question you might have.

Do you need immediate technical support? Visit our Resources page in the portal to access our video library that can help you:

- Create New Users
- Set up a Team Analytics Report
- Browse our Benchmark Library
- Use our Custom Report Builder
- Interpret Results
- And more!

The screenshot shows a 'Create a Case' form. It includes fields for Email (filled with 'dboyd@talentclick.com'), First Name (filled with 'Hubspot'), Last Name (filled with 'Test'), Company Name (filled with 'Test'), Case Type (a dropdown menu with 'Feature Request' selected), Name of Issue (filled with 'Can I please have the new sort functi'), and Issue Description (filled with 'Now please! hahaha'). A red 'Submit' button is at the bottom.

Contact Us

support@talentclick.com