

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

✉ clientcare@talentclick.com

TalentClick
Predict Strengths AND Risks.

Login

Username

Password

☒ Remember Username

LOGIN

[Forgot password?](#)

Don't have an account? [Contact Us](#)

Announcements

New Resources Available:

New Article: How to Avoid Unconscious Bias When Hiring

New Portal Live: See highlights of new interactive features in our 3-minute demo video or view our full 20-minute demonstration [here](#).

[Home](#) [Terms of Use](#) [Privacy Statement](#)

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Forgot Password?

1. Go to **<http://reports.talentclick.com/>**
2. Click the “[Forgot Password?](#)” Link

Login

Username

Password

☐ Remember Username

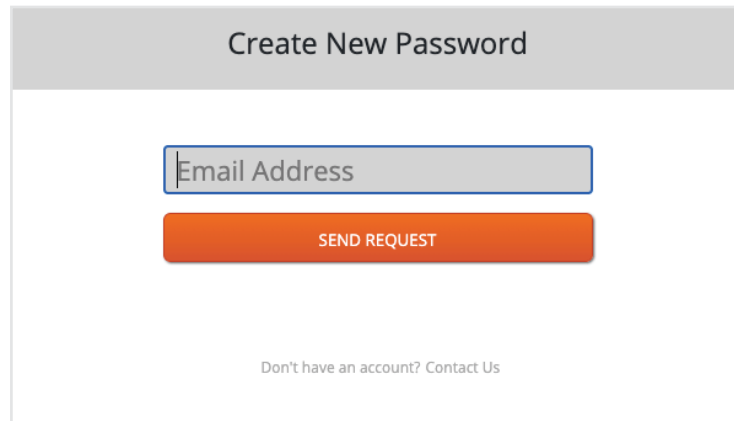
LOGIN

[Forgot Password?](#)

[Set Password?](#)

Don't have an account? [Contact Us](#)

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 interface. It includes input fields for Name, Product (set to ** ALL **), Report (set to ** ALL **), From (2012-01-01), and To (2020-07-09). There is a Benchmark section with a '+ Benchmark' button and a 'No benchmark' label. Below that is a Group Code dropdown menu set to 'All items checked'. At the bottom right are three 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 shows '** ALL **', is highlighted with a red rectangular box to draw attention to it.

- 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 shows 'All items checked', is highlighted with a red rectangular box to draw attention to it.

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.

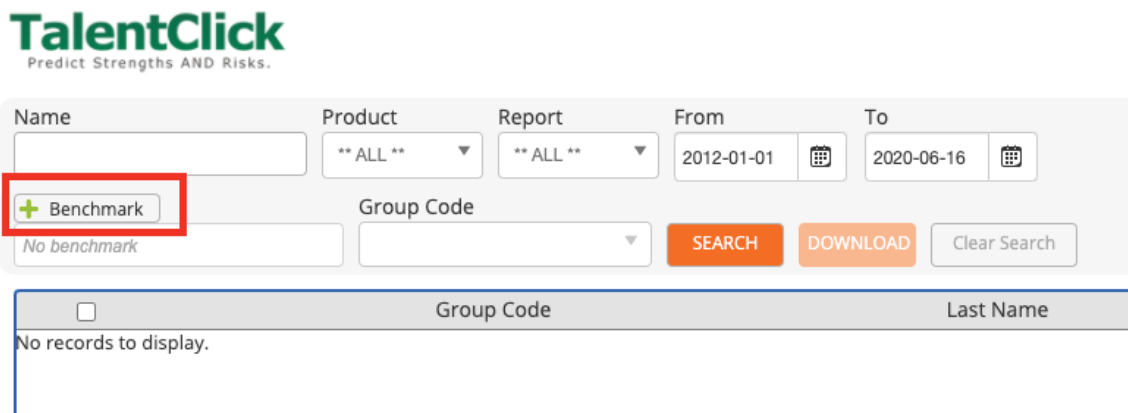
'Search by Fit Score' saves time by prioritizing the people most likely to be a good fit. It gives a TalentClick user (Administrator or Standard) the power to:

- 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



The screenshot shows the TalentClick portal interface for searching assessments. At the top is the TalentClick logo with the tagline 'Predict Strengths AND Risks.'. Below the logo is a search form with several fields: 'Name' (text input), 'Product' (dropdown menu showing '** ALL **'), 'Report' (dropdown menu showing '** ALL **'), 'From' (date picker showing '2012-01-01'), and 'To' (date picker showing '2020-06-16'). Below these fields is a 'Group Code' dropdown menu. To the left of the 'Group Code' dropdown is a button labeled '+ Benchmark' with a green plus icon, which is highlighted by a red rectangular box. Below the 'Group Code' dropdown is a 'SEARCH' button (orange), a 'DOWNLOAD' button (orange), and a 'Clear Search' button (grey). Below the search form is a table header with columns for 'Group Code' and 'Last Name'. Below the table header is a message that says '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

TC

TC

TC

TC

WPP

WPP

WPP

WPP

WPP

WVA

WVA

WVA

WVA

WVA

SQ

0

10

20

30

40

50

60

70

80

90

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"

Name

Product

** ALL **

Report

** ALL **

From

2012-01-01

To

2020-07-09

+ Benchmark

Customer Service Rep ABC Co MIN:40

×

Group Code

All items checked

SEARCH

DOWNLOAD

Clear Search

Search returned 32 reports

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

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

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

<input type="checkbox"/>	Group Code	Last Name	First Name	Fit Score	Product	Report	Date	PDF	Report Builder
--------------------------	------------	-----------	------------	-----------	---------	--------	------	-----	----------------

View Results

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

<input type="checkbox"/>	Group Code	Last Name	First Name	Fit Score	Product	Report	Date	PDF	Report Builder
<input type="checkbox"/>	TEST37 - TalentClick - AVP	Sample	Otis		Summary	Employer	19-May-2020		
<input type="checkbox"/>	TEST37 - TalentClick - AVP	Sample	Nancy		Summary	Employer	19-May-2020		
<input type="checkbox"/>	TEST37 - TalentClick - AVP	Sample	Kevin		Summary	Employer	19-May-2020		
<input type="checkbox"/>	TEST37 - TalentClick - AVP	Sample	Eric		Summary	Employer	19-May-2020		

Download Results

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

Name

Product

Report

From

To

** ALL **

** ALL **

2012-01-01

2020-07-09

+ Benchmark

Group Code

No benchmark

All items checked

SEARCH

DOWNLOAD

Clear Search

Search returned 57 reports

<input type="checkbox"/>	Group Code	Last Name	First Name	Fit Score	Product	Report	Date	PDF	Report Builder
<input checked="" type="checkbox"/>	TEST37 - TalentClick - AVP	Sample	Otis		Summary	Employer	19-May-2020		
<input type="checkbox"/>	TEST37 - TalentClick - AVP	Sample	Nancy		Summary	Employer	19-May-2020		

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



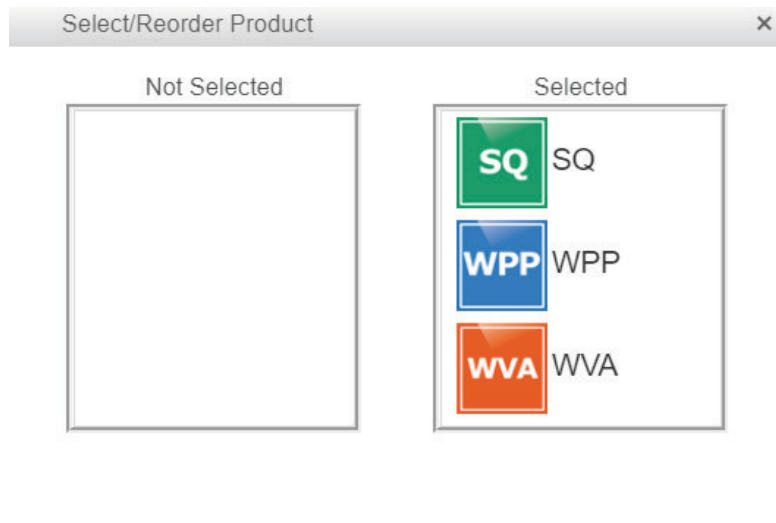
+ Benchmarks



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 SQ WPP WVA

+ Benchmarks

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

- 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

- TCT990_Sample Kelly_TCAVPEmployer_20200717-... 1 / 1

WORKSTYLE

Outgoing Regimented Reactive

These are the most extreme scores from the personality profile.

Non-Dominant

LEFT SIDE MID-LEFT MID RANGE MID-RIGHT RIGHT SIDE

Contented

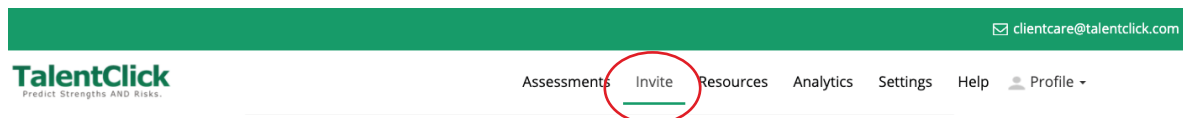
Dominant

Achievement-Focused

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"

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)

Assessment Url:

Participant Email: (required)

CC List: (Semicolon separated list)

BCC List: (Semicolon separated list)

Email Subject: (required)

Advanced

Email Template:

Hello {{User.Name}},

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:

{{User.SurveyLink}}

We look forward to exploring this further with you.

Thanks and regards,

Demo Test

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.

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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@gmail1.com)

Profile Password Permissions Groups & Links Notifications Sessions

Primary User Id: 1872

First Name: Demotwo Last Name: Test

Company: Test Company for Demo Divisions:

Level: Administrator Type: Customer

Email: demo2@gmail1.com

Save Cancel

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@gmail1.com)

Profile Password Permissions Groups & Links Notifications Sessions

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@gmail1.com)

Profile Password Permissions Groups & Links Notifications Sessions

Groups

VIEW	GROUP	DESCRIPTION	PRODUCT
<input checked="" type="checkbox"/>	TEST37	TEST37 - TalentClick - AVP	AVP Combo, AVP Interview, DSQ, SQ, Summary
<input checked="" type="checkbox"/>	TEST38	TEST38 - TalentClick - AVP CQ - 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.

The screenshot shows the TalentClick portal interface. At the top, the 'Companies' menu item is highlighted with a red box. Below it, the 'Bulk Purchase' tab is also highlighted with a red box. The 'Bulk Purchases' section displays three input fields: 'Purchased:' with a value of 0, 'Used:' with a value of 0, and 'Balance:' with a value of 0.

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

The screenshot shows the TalentClick portal interface. At the top, the 'Divisions' tab is highlighted with a red box. Below it, a table lists existing divisions. A red box highlights a green plus icon in the top left corner of the table, indicating the option to add a new division.

DIVISION		
	Division 11	×
	Division 22	×
	Div C	×

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.

TalentClick
Predict Strengths AND Risks.

Back My Account Users **Companies** Group Codes Reports Maintenance Profile ▾

search Companies: Find

Companies found: 528

A - Test

Profile Permissions Groups Bulk Purchase **Divisions**

	DIVISION	
	Division 11	
	Division 22	
	Div C	

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

TalentClick
Predict Strengths AND Risks.

Back My Account **Users** Companies Group Codes Reports Maintenance Profile ▾

Search Users: Companies: All companies Find

Users found: 1427

A - Test

- Division 11
 - Standarduser, Standard (standard@tc.com)
- Division 22
 - AdminlastCopy, AdminCopy (101694@invalid)
 - Test, Test
 - Tom, Test
- Div C
 - Adminlast, Admin (admin@tc.com)

Profile Password Permissions Groups & Links Notifications

Sessions

Primary User

Id: 1694

First Name: Admin Last Name: Adminlast

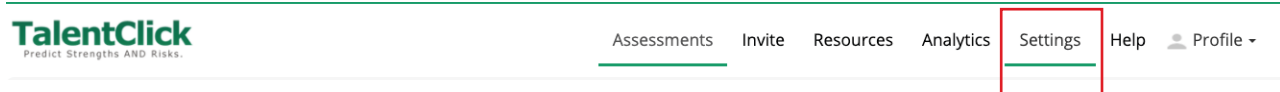
Company: A - Test Divisions:

Level: Administrator Type: Customer

Email: admin@tc.com

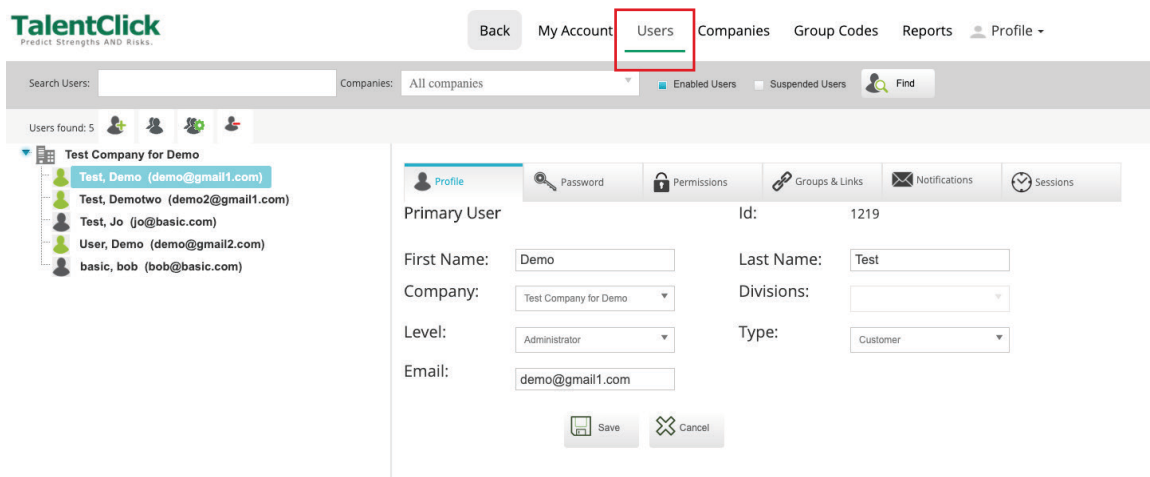
Settings - Users

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. The top navigation bar includes 'Back', 'My Account', 'Users', 'Companies', 'Group Codes', 'Reports', 'Maintenance', and 'Profile'. Below this, there's a search bar and filters for 'Companies' (All companies), 'Enabled Users', and 'Suspended Users'. A 'Find' button is also present. The left sidebar shows a tree view of users under 'A - Test', including 'Division 11' (Standarduser, Standard), 'Division 22' (AdminlastCopy, AdminCopy), and 'Div C' (Adminlast, Admin). The main content area displays the 'Profile' tab for the selected user. The 'Primary User' section shows the user's details: Id: 1694, First Name: Admin, Last Name: Adminlast, Company: A - Test, Level: Administrator, Email: admin@tc.com, and Type: Customer. The 'Divisions' field is highlighted with a red box. There are 'Save' and 'Cancel' buttons at the bottom.

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, showing the 'Profile' tab for a user. However, in this version, the 'Divisions' field is not highlighted with a red box. Instead, the 'Profile' tab itself is highlighted with a red box, and the 'Sessions' tab is also highlighted with a red box. The 'Primary User' section shows the same user details as before: Id: 1694, First Name: Admin, Last Name: Adminlast, Company: A - Test, Level: Administrator, Email: admin@tc.com, and Type: Customer. There are 'Save' and 'Cancel' buttons at the bottom.

- **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 for 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"/> AVP Combo
<input checked="" type="checkbox"/> Participant	<input type="checkbox"/> AVP Interview
	<input checked="" type="checkbox"/> DSQ
	<input checked="" type="checkbox"/> Leadership Profile
	<input checked="" type="checkbox"/> SQ

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

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

Users found: 5

Test Company for Demo

- Test, Demo (demo@gmail1.com)
- Test, Demotwo (demo2@gmail1.com)
- Test, Jo (jo@basic.com)
- User, Demo (demo@gmail2.com)
- basic, bob (bob@basic.com)

Profile Password Permissions **Groups & Links** Notifications Sessions

Groups

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

Save Cancel

Links

	SURVEY URL	DESCRIPTION	
Edit	https://assessments.talentclick.com/s3/avpcq?g=TEST38	AVP CQ (SQ WPP WVA CQ) - Location A	Delete
Edit	https://assessments.talentclick.com/s3/TalentClickInternal1g=TEST37	AVP Link (SQ WPP WVA)	Delete

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.

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

Users found: 5

Test Company for Demo

- Test, Demo (demo@gmail1.com)
- Test, Demotwo (demo2@gmail1.com)
- Test, Jo (jo@basic.com)
- User, Demo (demo@gmail2.com)
- basic, bob (bob@basic.com)

Profile Password Permissions Groups & Links **Notifications** Sessions

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

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

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

Users found: 5

Test Company for Demo

- Test, Demo (demo@gmail1.com)
- Test, Demotwo (demo2@gmail1.com)
- Test, Jo (jo@basic.com)
- User, Demo (demo@gmail2.com)
- basic, bob (bob@basic.com)

Profile Password Permissions Groups & Links Notifications **Sessions**

LOGGED IN	LOGGED OUT	DURATION	IP ADDRESS
Tue 07-Jul-2020 21:17	???	???	24.67.2.129
Tue 07-Jul-2020 21:09	Tue 07-Jul-2020 21:11	00:02:00	24.67.2.129
Tue 07-Jul-2020 21:01	Tue 07-Jul-2020 21:01	00:00:00	24.67.2.129
Fri 03-Jul-2020 21:59	Sat 04-Jul-2020 00:16	02:17:00	24.67.2.129
Fri 03-Jul-2020 21:39	???	???	24.67.2.129

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.

The screenshot displays the TalentClick portal's 'Users' management section. On the left, a tree view shows the hierarchy: 'A - Test' (Company) contains 'Division 11', 'Division 22', and 'Div C'. Under 'Division 11' is 'Standarduser, Standard (standard@tc.com)'. Under 'Division 22' is 'AdminlastCopy, AdminCopy (101694@invalid)'. Under 'Div C' is 'Adminlast, Admin (admin@tc.com)'. The right panel shows the profile of the selected user, 'Adminlast, Admin (admin@tc.com)'. It includes tabs for Profile, Password, Permissions, Groups & Links, and Notifications. The 'Primary User' section shows fields for First Name (Admin), Last Name (Adminlast), Company (A - Test), Level (Administrator), Email (admin@tc.com), Id (1694), Divisions, and Type (Customer). There are 'Save' and 'Cancel' buttons at the bottom.

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 tabs: Back, My Account, Users, Companies, Group Codes, Reports, Maintenance, and Profile. Below this is a search bar and a list of users. On the left, a tree view shows the organizational structure with divisions and users. The main area displays the 'Profile' tab for a user named 'Adminlast, Admin'. The 'Divisions' dropdown menu is highlighted with a red box. The user details form includes fields for First Name (Admin), Last Name (Adminlast), Company (A-Test), Level (Administrator), Email (admin@tc.com), and Type (Customer). 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 for the same user. It displays a message: 'Email link to user to create new password.' Below this message is a 'Send' button, which is highlighted with a red box.

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

☒ Employer

☒ Participant

Product Types

☒ AVP Combo

☒ AVP Interview

☒ DSQ

☒ Leadership Profile

☒ SQ

☒ Summary

Save
Cancel

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.

Profile
 Password
 Permissions
 Groups & Links
 Notifications
 Sessions

Groups

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

Save
 Cancel

Links

+

	SURVEY URL	DESCRIPTION	
Edit	https://assessments.talentclick.com/s3/avpcq?g=test38	AVP CQ (SQ WPP WVA CQ) - Location A	Delete
Edit	https://assessments.talentclick.com/s3/TalentClickInternal155?g=test37	AVP Link (SQ WPP WVA)	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)

Profile
 Password
 Permissions
 Groups & Links
 Notifications
 Sessions

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"

The screenshot shows the TalentClick portal interface. At the top, there's a navigation bar with tabs: Back, My Account, Users (selected), Companies, Group Codes, Reports, and Profile. Below the navigation bar, there's a search section with 'Search Users:' and 'Companies: All companies'. A list of users is displayed under 'Users found: 5'. The user 'User, Demo (demo@gmail2.com)' is highlighted with a red box. To the right, the user's profile is shown with tabs: Profile (selected), Password, Permissions, Groups & Links, Notifications, and Sessions. The profile fields are as follows:

Primary User		Id: 1903	
First Name:	Demo	Last Name:	User
Company:	Test Company for Demo	Divisions:	
Level:	Administrator	Type:	Customer
Email:	demo@gmail2.com		

At the bottom of the profile form, there are 'Save' and 'Cancel' buttons.

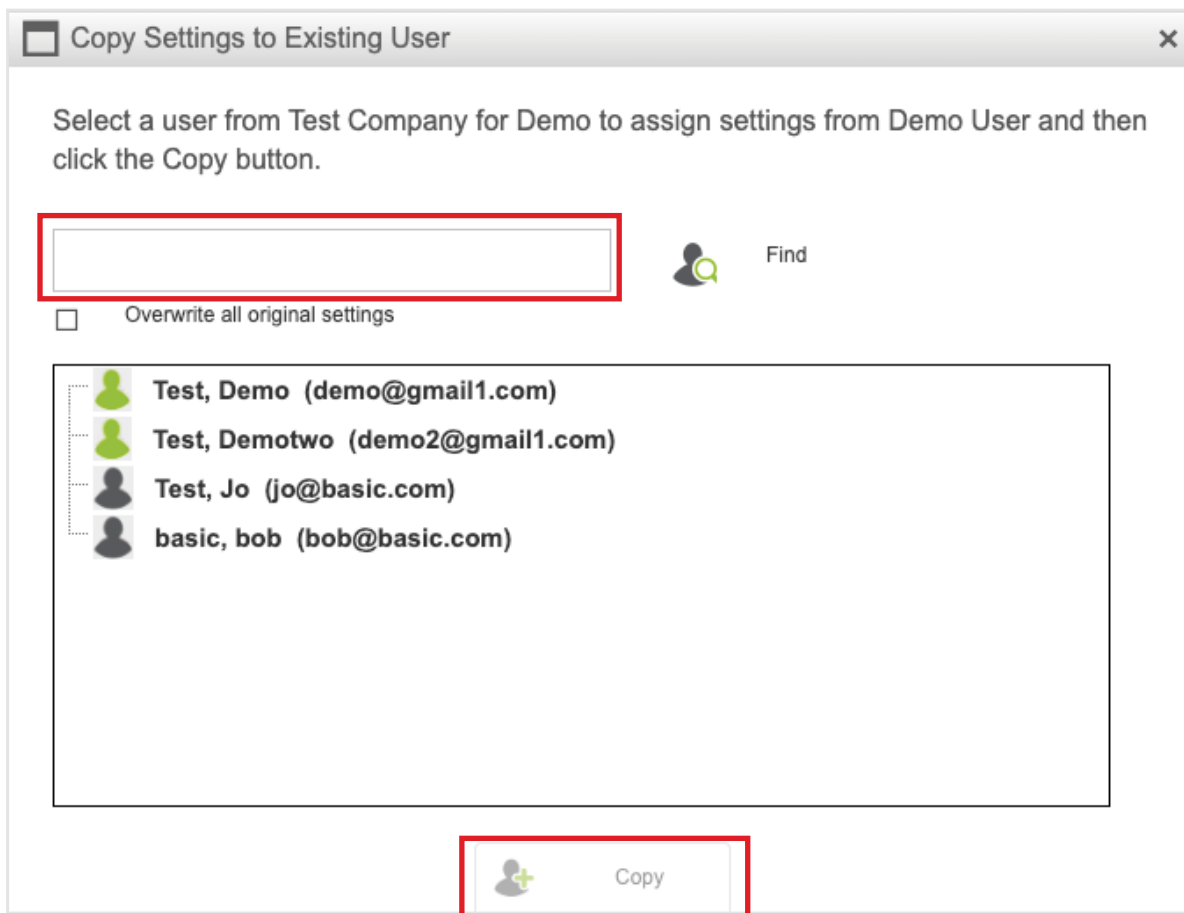
5. Search or Select the user name you want to assign the settings to.

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)

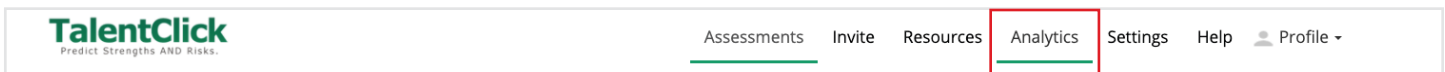
 Copy

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 the 'Create New Report' dialog box. It has a title bar with a checkbox and the text 'Create New Report'. Below the title bar, there are two fields: 'Name' with the value 'Test Report' and 'Product' with a dropdown menu set to 'DSQ'. At the bottom, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted.

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

The screenshot shows the TalentClick dashboard. On the left sidebar, under the 'Teams' section, there is a yellow 'Add Team' button. The main content area displays a 'DSQ Team Report' for '2018-Dec-18 17:56'. The report includes a table with columns for 'LEFT SIDE', 'MID RANGE', and 'RIGHT SIDE'. The 'LEFT SIDE' is labeled 'Resistant' and the 'RIGHT SIDE' is labeled 'Accommodating'.

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 dashboard. In the 'Teams' section, the 'Add Member' button is highlighted. Below it, a table shows the details for 'Test Team TC', including columns for 'NAME', 'DATE', and 'GROUP'. The table is currently empty, with a message '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 includes a search input field with the text 'test', a 'Find' button, and a date range picker set to 'From 2008-12-01 To 2018-12-01'. Below the search field is a table with columns for 'NAME', 'DATE', 'GROUP', and 'ID'. The table contains three rows of assessment data.

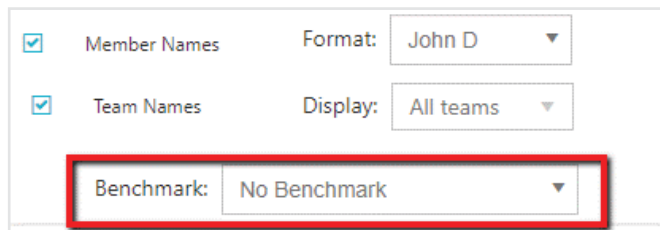
NAME	DATE	GROUP	ID
Test5575, Test5575	2018-12-07	ICS001	127
Test5575, Test5575	2018-12-12	ICS003	144
Test5575_2, Test5575_2	2018-12-10	ICS001	134

Found 3 assessments
Select assessments, search again or close

At the bottom of the dialog box, there is 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. The first row has a checked checkbox for 'Member Names' and a 'Format:' dropdown menu set to 'John D'. The second row has a checked checkbox for 'Team Names' and a 'Display:' dropdown menu set to 'All teams'. The third row has a 'Benchmark:' dropdown menu set to 'No Benchmark', which is highlighted with a red rectangular border.

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' section. The navigation bar at the top includes 'TC Analytics', 'Home', 'Team Reports', 'Benchmark', and 'Usage' (which is the active tab). The 'Usage' section is titled 'Usage Report'. On the left side, there are several filter parameters: 'Unique Responses' (a toggle switch that is turned on), 'Number of Participants', 'Report' (a dropdown menu set to 'Summary'), 'Products' (a dropdown menu set to 'All Products'), 'Payment' (a dropdown menu set to 'All Payment Type'), 'Period' (a dropdown menu set to 'Totals'), 'Date Range' (a dropdown menu set to 'This Month'), and 'Companies' (a search bar). The main area of the page 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

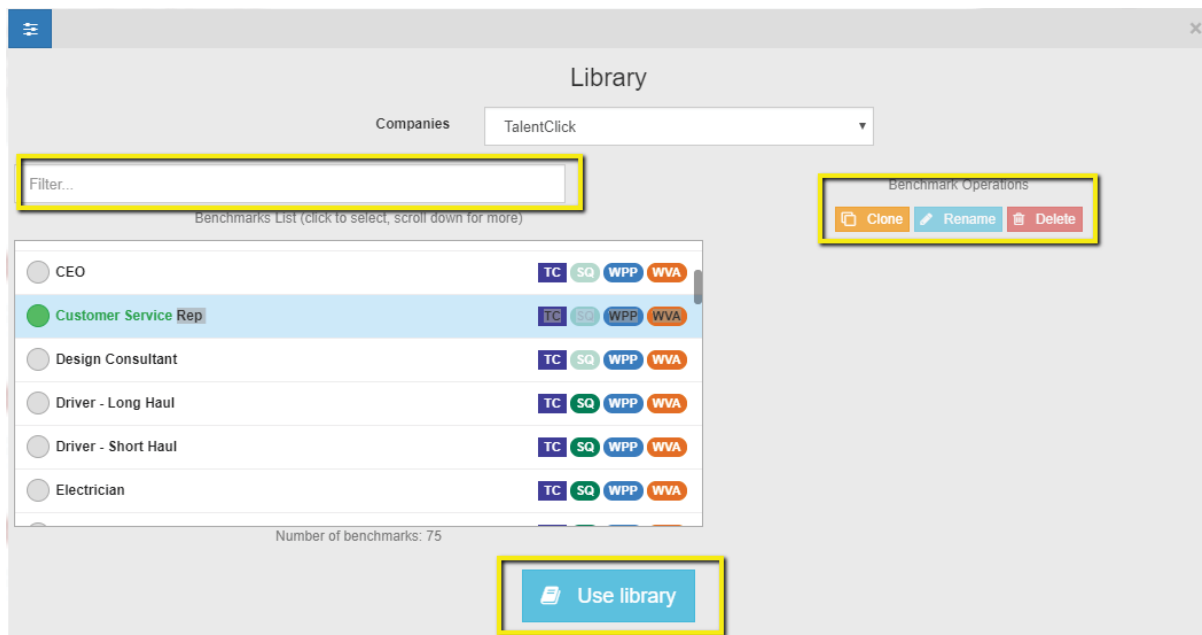
Benchmarks

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

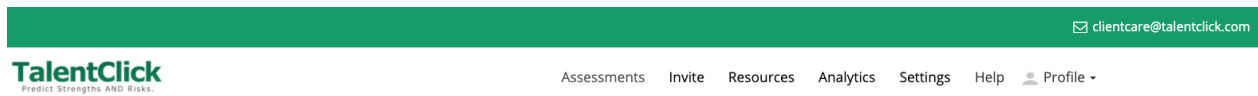


Note: If you'd like to have specific Benchmark ranges to appear on all your Assessment Reports please contact us to discuss details. We can customize Benchmark ranges to be based on data specific to your team or organization. (support@talentclick.com)

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 the 'Create a Case' form. It has the following fields: Email (dboyd@talentclick.com), First Name (Hubspot), Last Name (Test), Company Name (Test), Case Type (Feature Request), Name of Issue (Can I please have the new sort functik), and Issue Description (Now please! hahaha). There is a red 'Submit' button at the bottom.

Contact Us

support@talentclick.com