TALENTRON™

Better Interviews • Faster Hires

User Guide

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Managing Your Account

Click "Your Account" in the top left hand corner of the screen to access your Account Summary tab.

Account Summary

Preferences

Set Time Zone

On the Account Summary tab in the Preferences section, click "Edit" to set the Time Zone.

Note: It's important to set the correct Time Zone for your location to ensure the accuracy of date and time information on email and reports generated by the Talentron app.

Login Details

Change User Name/Email Address

Only Users with Admin Privileges are allowed to change User Names/Email Addresses. If you need to change your User Name/Email Address, please contact your company's Talentron Admin.

Change Password

On the Account Summary tab in the Login Details section, click "Edit" on the Password line to change your Password.

Account Details

On the Account Summary tab in the Account Details section your current subscription plan is listed.

Getting Started

This User Guide provides instructions for how to do the following:

1. Create Open Positions.

2. Build Interview Question Guides for Positions by selecting Instant Questions from the Question Bank or creating your own Custom Questions.

3. Add names of Candidates to be interviewed for Positions.

4. Build a list of Interviewers who can Interview and Assess Candidates. Create Interview Teams for specific Positions. Assign Interview Team Members to different Candidates.

5. Interview and Assess Candidates. Assign Interview Question to Team Members. Automatically send them a link to the Interview Assistant to help them conduct the Interview, and a link to the Candidate Assessment to complete after the interview.

6. View Candidate Assessment Reports. As Interviewers complete Candidate Assessments, the detailed results are made available in a Team Assessment Report.

7. Discover Top Candidates. A click of the Candidate Ranking button will reveal Candidates in order based on their assessment scores.

Interview Management Dashboard

Click the Dashboard button in the navigation bar at the top of the screen to view the Interview Management Dashboard.

Positions

Add A Position

On the Interview Management Dashboard in the Positions section, click the Add "+" icon at the top of the section. The Add Position form will open. Enter Position Title and select the appropriate Business Unit and Department from the dropdown menus. Click "Save".

Note: Attributing the correct Business Unit and Department to the Position will ensure the correct Position information is given when Reports are run.

Change Position Status: Open, Filled, Closed

Positions can be organized into three lists by their status: Open, Filled or Closed. To change the status of a Position, hover over the Arrow ">" icon to the right of the Position title and select Filled or Closed from the dropdown menu. Once a Position is marked Filled or Closed, it can be Re-Opened from the same dropdown menu.

Interview Questions

On the Interview Management Dashboard in the Interview Questions section, when you first open a Position you will be invited to "Select Interview Questions for this Position". When you click the "Now" button, you will be taken to the "Select Interview Questions" page. The title of the Position you are selecting questions for will be listed at the top of the page.

Select Interview Questions

In the Skills section, select a Skill required for the Position. Once selected, the Questions pertaining to that Skill will be revealed in the Question Bank section to the right.

Drag and drop the questions you want into the Interview Questions section at the right. Select another skill and repeat until you have a complete set of questions.

To delete a question, click the "X" in the upper right hand corner of the question box.

When you are finished click "Done". You will be taken back to the Interview Management Dashboard. Or, click the "Build Your Own Question" button.

Build Your Own Questions
On the Select Interview Questions page, you have the option to click the "Build Your Own Questions" button. This will take you to the Question Bank page where you can use the Question Builder to create a custom question.

The Skill you selected on the Select Interview Questions page will be listed at the top of the Custom Question field. If you want to create a custom question for a different Skill, select that Skill from the Skills section.

Type the question into the Custom Question field and click "Save". You will be given the option to build another question, or return to the Select Interview Questions page.

Upon returning to the Select Interview Questions page, drag and drop your newly created question to the Interview Questions section and click "Done".

See Question Builder Spinner for more options regarding creating custom questions.

Add Interview Questions
After you have selected Interview Questions for a Position, you can go back at any time and add more questions.

On the Interview Management Dashboard, Interview Questions section, click the Plus "+" icon. You will be taken to the Select Interview Questions page. Select a Skill required for the Position. Once selected, Questions pertaining to that Skill will be revealed in the Question Bank section to the right. Drag and drop the questions you want to add to the interview into the Interview Questions section at the right.

When you are finished, click "Done". You will be taken back to the Interview Management Dashboard.

Delete Interview Questions
After you have selected Interview Questions for a Position, you can go back at any time and delete questions.

On the Interview Management Dashboard, Interview Questions section, click the Minus "-" icon. You will

be taken to the Select Interview Questions page. In the Interview Questions section, click the "X" in the upper right hand corner of the box containing the question you want to delete. When you are finished, click "Done". You will be taken back to the Interview Management Dashboard.

Candidates
You can add Candidates to an Open Position at any time.

Add Candidate
On the Interview Management Dashboard in the Candidates section, click the Add "+" icon at the top of the section. The name field will open. Enter the Candidate's first name and last name, and then press the Enter/Return key on the keyboard to Save.

Edit Candidate
To edit a Candidate, hover over the Arrow ">" icon next to the Candidate's name and select "Edit". The name field will open allowing you to make changes. When you are finished, press the Enter/Return key on the keyboard to Save.

Delete Candidate
To delete a Candidate, hover over the Arrow ">" icon next to the Candidate's name. Select "Delete".

Assessment Status
By selecting a Position on the Interview Management Dashboard, you can view the Candidate Assessment Status for that Position in the Assessment Status section at the far right hand side of the Dashboard.

Incomplete/Complete
To view the completion status of Candidate Assessments, go to the Interview Management Dashboard, in the Assessment Status section next to the Candidate's name. Click on "Incomplete" to see which of Interview Team Members have not completed an Assessment for this Candidate. "Incomplete" will change to "Complete" once all Interview Team Members have completed the Candidate Assessment.

Assess Now
If you are an Interview Team Member and have not yet completed a Candidate Assessment, "Assess Now" will appear in the right hand column after the candidate's name. To open the Candidate Assessment form, click "Assess Now".

Candidate Assessment Form
Candidates are assessed on a four star rating scale. Four

levels of rating criteria are listed for each Skill to help guide Interview Team Members in rating the Candidate.

The first part of the Candidate Assessment form is generated based on the specific Skills covered by the Interview Questions. The second part is based on the Candidate's fit for the job position and the company.

Real Time Rater
The Real Time Rater gauge appears on the second part of the Candidate Assessment. As the interviewer completes the assessment, the Real Time Rater displays the average rating. It also provides the corresponding recommendation of whether or not to move forward with the candidate.

View Report
As Candidate Assessments are completed by Interview Team Members, the data is compiled in a Team Assessment Report. On the Interview Management Dashboard in the Assessment Status section, click "View Report".

Candidate Ranking
On the Interview Management Dashboard in the lower right hand side, click the "Candidate Ranking" button to view a list of Candidates in order with the highest ranked Candidate listed at the top and the lowest ranked Candidate listed at the bottom.

Interview Team

For each Open Position, you can select a unique Team of people to interview Candidates. Once your team is selected, you can assign specific Interview Questions for specific Candidates to Team Members.

Add Interview Team
On the Interview Management Dashboard in the Interview Team section, click the Add "+" icon at the top of the section. The Team Member name field will open. Enter the name of the Team Member you want to add. Click on the correct name when it appears in the dropdown menu.

Note: In order for an Interviewer to be added to a Team, their name must first be entered in the Team Builder Interviewers list.

See Team Builder for instructions on adding names to the Interviewers list.

Assign Questions to Team Members
On the Interview Management Dashboard in the Candidate section, select the name of the Candidate to be interviewed.

From the Interview Team section, drag the name of a Team Member to the Interview Questions section and drop it in the "Please Drop Interviewer here" box by the question you want to assign.

To assign an Interview Question to all interviewers on the Team, drag and drop "All Interviewers" to the question.

Delete Question Assignment
To delete an Interviewer from a question assignment, click the "X" next to the Interviewer's name in the blue box containing their name.

Email Interview Questions to Team Members
When you email Interview Questions to Team Members, they receive the candidate's name along with a list of the interview questions they have been assigned to ask. The email also contains a link to the Interview Assistant to help them conduct the Interview, and a link to the Candidate Assessment to complete after the interview.

To send Interview Questions to Team Members, click "Email" at the top left of the Interview Questions section. An Email window will open. The names of Team Members who have been given question assignments will appear in the address field. Each Interviewer will be sent their assigned questions only.

You can add a message to the email in the Message field, or click "Browse" in the Attach File section to attach a document such as the Candidate's Résumé or CV. Once you have added any message or attachment, click "Send Email".

View as PDF
Click "View as PDF" at the top right of the Interview Questions section to open a printable PDF document listing Candidate name, Interview Questions and Team Member question assignments.

Interview Assistant
The Interview Assistant displays interview questions one at a time along with prompts that help the interviewer obtain complete answers.

To access the Interview Assistant, click the "Interview Assistant" button at the top of the Interview Questions section. The Interview Assistant can also be accessed via the "Interview Assistant" link provided in the Interview Question email.

Upon completing the interview, click "Done". The Assessment form for that Candidate will open.

Team Builder

Click the Team Builder button in the navigation bar at the top of the page to access the Interviewers list. The Team Builder is a list of Interviewers available to interview Candidates. Once an Interviewer's name and email address are added to this list, they can be selected as Team Members for specific Positions via the Interview Management Dashboard.

Add Interviewers

Users have the ability to add Interviewers to their own Team Builder list via the "Add New Team Member" form on the Team Builder page.

Reports

The Admin of the Talentron account determines who has access to the Reports Dashboard. If you have access, there will be a Reports button in the navigation bar at the top of the screen between Team Builder and Question Bank.

Run Reports

Click the Reports button in the navigation bar at the top of the page to access the Reports Dashboard.

In the "Report On" section, check the corresponding box to view data on All Positions, only Open, Filled, or Closed Positions, or any combination of the three.

In the "Report For" section, use the dropdown menus to select the Business Unit, Department, Recruiter and Position parameters for the data you wish to see.

In the "Report From" and "Report To" sections, set the date parameters for the report via the popup calendars.

Once all settings are selected, click the "Run Report" button. The data will be displayed in the cells at the bottom of the Reports Dashboard.

Question Bank

Click the Question Bank button in the navigation bar at the top of the page to access the Question Bank. Depending on which Talentron plan you are subscribed to, the Question Bank is populated with 10 to 20 Skills and a list of 3 to 5 Interview Questions for each skill. Skills and Questions may also be uploaded to the Question Bank by the Admin of the Talentron account. You can add an unlimited number of your own custom Skills and Interview Questions via the Question Builder.

Viewing Skills, Definitions and Instant Questions

Skills are listed in alphabetical order in the Skills section. To view Interview Questions for a Skill, click on the Skill name. The Interview Questions for that Skill will appear in the Question Bank section to the right.

You can view the definition of a Skill by clicking on the arrow ">" icon at the left of the Skill name.

Add Questions to Existing Skills

To add a question to a Skill, click on the Skill name in the Skills section to select it. A selected Skill will appear highlighted in bold blue type, and the Skill name will also appear at the top of the Custom Question field. Enter the question you wish to add in the field below the skill name and click "Save". That question will now appear in the Question Bank for that Skill.

Delete Question

To delete a question you have added to a Skill, click on the "X" at the far left of the box containing the question you want to delete.

Add New Skill and Questions

To add a Skill, go to the Add New Skill form in the upper left hand corner of the Question Bank page. Enter the Skill Name and Definition (Definition Optional), and click "Save". The Skill will appear in alphabetical order in the Skills list.

To add a question to a new Skill, click on the Skill name in the Skills section. The selected Skill will appear highlighted in bold blue type, and the Skill name will also appear at the top of the Question Builder field. Enter the question you wish to add in the field below the skill name and click "Save". That question will now appear in the Question Bank for that Skill.

Question Builder Spinner

The Question Builder spinner is populated with phrases in three categories to help you build a behavioral interview question. You can click through the phrases in each category one at a time, or click the "Spin" button at the top of the spinner to get a random combination of phrases.

Double-click in the highlighted area of the spinner to make the phrases appear in the question field below. Here you can edit the question. Once you have the question you want to add to the Skill, click "Save".

The question will now appear in the Question Bank for that Skill. You will be given the option to Build Another Question, or Return to the Select Interview Questions screen.

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Admin Guide

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Managing Your Account

Click "Your Account" in the top left hand corner of the screen to access your Billing Details and Account Summary tabs.

Billing Details

Billing Profile
On the Billing Details tab, the Billing Profile section lists your current Talentron subscription plan and allows you to make changes to your plan.

Change Account Type
On the Billing Details tab, in the Billing Profile section, click "Change Account Type" to change to any Talentron subscription plan — Basic, Select, or Premium.

Upgrading your plan will not affect your data. However, a downgrade may cause you to lose some data depending on the features included in the plan you are downgrading from. See Talentron Pricing for a list of features that will be affected by a plan change.

Change Billing Frequency
On the Billing Details tab, in the Billing Profile section, click "Change Billing Frequency" to change from Monthly to Annual or vice versa.

Monthly to Annual: If you change from Monthly to Annual billing frequency, you will be credited for the unused portion of your current Monthly invoice, and then charged the discounted Annual subscription fee.

Annual to Monthly: If you change from Annual to Monthly billing frequency after the 11th month of your subscription, you will be billed on a Monthly basis starting after the anniversary date of your Annual subscription.

If you go from Annual to Monthly billing frequency before the 12th month of your Annual subscription, you will be billed retroactively as if you selected a Monthly subscription at the beginning of your Annual subscription. The difference between the discounted Annual rate and the Monthly rate will be calculated and you will be billed for that difference, and then credited for any remaining amount. You will then be billed on a Monthly basis going forward.

Change Number of Users
On the Billing Details tab, in the Billing Profile section, click "Change Number of Users".

Increasing the Number of User Seats: Once you increase the number of user seats and your payment has been confirmed, the increased number of seats will be made available in your account.

Decreasing the Number of User Seats: Upon decreasing the number of user seats, the following will occur:

- If you have seats in your account with no Users assigned, equal to or greater than the number of seats you are decreasing, those seats will automatically be deleted.

- If you have seats in your account assigned to Users exceeding the number of seats you are decreasing, you will be asked to select which User(s) to disable to reach the decreased number for your subscription.

- If you have a Monthly subscription, you will be credited for the difference in the number of seats for the unused portion of your current Monthly invoice, and then charged for the decreased number of seats on a Monthly basis after that.

- If you have an Annual subscription, you will be credited for the difference in the number of seats for the unused portion of your current Annual invoice.

How Decreasing the Number of Users Affects Your Data: Historical data from Disabled User accounts will remain available for Reports, and the Admin will retain view-only access to the last instance of a Disabled User's Interview Management Dashboard.

Billing History
The Billing Details tab Billing History section contains a list of all transactions related to your Talentron subscription.

Payment Information
The Billing Details tab Payment Information section lists your method of payment.

Click "Add" to fill out the Add Payment Information form.

On the Payment Information form, check the "Billing Receipts" box if you want to receive an email whenever a billing transaction takes place.

Click "Edit" to fill out the Edit Payment Information form.

Contact Information
The Billing Details tab Content Information section lists your account-related contact information. The information you provide on the Payment Information form will be your default Contact Information. This information will be used exclusively for billing and account related correspondence.

Click "Add" to fill out the Add Contact Information form.

Click "Edit" to fill out the Edit Information form.

Account Summary

Preferences

Set Time Zone

On the Account Summary tab in the Preferences section, click "Edit" to set the Time Zone. It's important to set the correct Time Zone for your location to ensure the accuracy of date and time information on email and reports generated by the app.

Login Details

Change User Name/Email Address

On the Account Summary tab in the Login Details section, click "Edit" on the User Name line to change your User Name/Email Address.

Note: Admins are the only Users allowed to change their own User Name/Email Address. The User Names/Email Addresses of Non-Admin Users must be changed by an Admin via the User Management tab on the Admin Dashboard.

Change Password

On the Account Summary tab in the Login Details section, click "Edit" on the Password line to change your Password.

Account Details

The Account Summary tab in the Account Details section lists your current subscription plan.

Cancelling Your Subscription

On the Account Summary tab in the Login Details section, click "Cancel Subscription" to cancel your subscription.

Upon cancelling a Monthly subscription, the cost of the plan will be prorated and you will be charged up through the date of cancellation, after which no further fees will be charged.

If you cancel an Annual subscription after the 11th month of your subscription, the cost of the plan will be prorated and you will be charged up through the date of cancellation, after which no further fees will be charged.

If you cancel an Annual subscription before the 12th month of your subscription, you will be billed retroactively as if you selected a Monthly billing frequency at the beginning of your subscription. The difference between the discounted Annual rate and the Monthly rate will be calculated. You will be billed for that difference and refunded the remaining amount (if any), after which no further fees will be charged.

Refunds

If you are experiencing a subscription change scenario other than those described in this User's Guide, or if you believe you have been inappropriately charged and/or would like to speak to someone about a refund, please contact the Talentron Account Team.

Using The Admin Dashboard

Click "Admin" to the right of the Talentron logo at the top of the screen to access the Admin Dashboard which contains the Preferences, User Management, and Reports Access tabs.

Preferences

The settings you apply on the Preferences tab will affect all Users of your Talentron account.

Candidate Assessment Comments

On the Preferences tab in the Candidate Assessment Comments section, select the "On" button to allow Interviewers to add Comments after each question on the Candidate Assessment form.

Select the "Off" button to hide the Comments field on the Candidate Assessment form.

Real Time Rater Settings

The Real Time Rater is a gauge that appears on the Candidate Assessment form and displays the Candidate's rating and corresponding recommendation as the Interviewer fills out the form.

To change the settings for rating levels that result in the recommendations, go to the Preferences tab Real Time Rater Settings section and click on the up/down arrows on either side of the dial.

Position Attributes

The Company name, Business Units and Departments you designate in the Position Attributes section will populate dropdown menus in two places — the Reports Dashboard and the Add Position form on Interview Management Dashboard.

Company

By default, the company name entered upon registration will appear in the Company column. To edit the Company name, go to the Preferences tab Position Attributes section and click "Edit".

Business Unit

To add a Business Unit, go to the Preferences tab Position Attributes section and click the Add "+" icon at the top of the Business Unit column.

If your company does not have Business Units but you do want to add Departments, add your Company name in the Business Unit column.

To edit or delete a Business Unit, click the Arrow "›" icon next to the Business Unit name.

Note: If you Delete a Business Unit, all the Departments listed under that Business Unit will also be deleted.

Department

To add a Department, go to the Preferences tab Position Attributes section. First select the name of the Business Unit the Department belongs to in the Business Unit column, the click the Add "+" icon at the top of the Department column.

To edit or delete a Department, click the Arrow "›" icon next to the Department name.

User Management

Each User added to the Talentron account receives access to their own Interview Management Dashboard, Team Builder and Question Bank.

Add Users

On the User Management tab, go to the Add User form, enter first name, last name and email address and click "Save".

Send Link

Once a User name appears in the User list, go to the Action column and click "Send Link". This will send an auto-generated email to the User be with a password and instructions on how to sign in to the account.

Edit

Clicking "Edit" in the Action column will display the User's first name, last name, and email address in the Add User form, allowing you to make and Save changes.

Disable/Enable

Clicking "Disable" in the Action column will immediately result in a User being denied access to their account. Disabled Users will remain in the Users list, their data will remain accessible to Reports, and Admins will still be able to View Dashboard. To reinstate User access, click "Enable".

Delete User

Clicking "Delete" in the Action column will immediately result in a User being deleted from the account. The deleted User name will be removed from the User's list and Admins will no longer be able to View Dashboard. Deleted User data will reamain accessible to Reports.

Reset Password

To reset a User's Password, go to the Action column and click "Reset Password" and then click "Send Link" to send an auto-generated email with a new Password.

Admin Privileges

By default, the person who initiates the Talentron account is assigned Super Admin privileges. The Super Admin can grant Admin Privileges to a Second Admin.

Note: The Second Admin has all of the same privileges as the Super Admin with the exception of being able to Disable the Super Admin's account.

To Grant Second Admin Privileges to a User: Go to the User Management tab Users section and select "Second Admin" from the dropdown menu in the row corresponding to the User's name. Next, click "Send Link". This will send an auto-generated email notification saying the User has been granted Second Admin privileges and the next time they sign in to their account they will have access to the Admin Dashboard.

To Transfer Super Admin Privileges to a User: Go to the User Management tab Users section and select "Super" from the dropdown menu in the row corresponding to the User's name. Next, click "Send Link". This will send an auto-generated email notification saying that Super Admin privileges are being transferred to the User, and the next time they sign in to their account they will have access to the Admin Dashboard in the role of Super Admin.

Once this newly appointed Super Admin signs in to their account, the previous Super Admin's privileges revert to "None".

Reports Access

To allow a User access to the Reports Dashboard, go to the User Management tab Users section and check the box in the Reports Access column in the row corresponding to the User's name.

View Dashboard

You can gain view-only access to each User's Dashboard by going to the User Management tab Users section and clicking the "View Dashboard" button in the row corresponding to the User's name.

On the User's Dashboard, you can view Positions, Interview Questions, Interview Team, Candidates, and Assessment Status.

Reports Access

The Reports Access tab Reports Access Allowed section is a list of people who are not registered Users, but who require access to the Talentron Reports Dashboard. These people are referred to as Non-Users.

Add Non-Users

To add a Non-User, go to the Reports Access tab Add Non-User form, enter first name, last name and email address and click "Save".

Send Link

Once a Non-User name appears in the Reports Access Allowed list, go to the Action column and click "Send Link". This will send an auto-generated email to the Non-User with a password and instructions on how to sign in to the Reports Dashboard.

Edit

Clicking "Edit" in the Action column will display the Non-User's first name, last name, and email address in the Add Non-User form, allowing you to make and Save changes.

Reset Password

To reset a Non-User's Password, go to the Action column and click "Reset Password", and then click "Send Link". This will send an auto-generated email to the Non-User with a new Password.

Team Builder

The Team Builder is a list of Interviewers available to interview Candidates. Once an Interviewer's name and email address are added to this list, they can be added as Interview Team Members for specific Positions.

All Users have the ability to add Interviewers to their own Team Builder list via the "Add New Team Member" form on the Team Builder page.

Note: Team Members entered via the "Add New Team Member" form appear only in Team Builder list belonging to the User who added them.

As Admin, you can upload names to the list of Interviewers via CSV file. Click on the Team Builder tab in the navigation bar, then click the "Bulk Import via CSV" button in the upper right hand corner of the

Interviewers list. Be sure to View File Format to make sure the CSV file you are uploading is formatted correctly.

Note: Team Members uploaded via CSV file will appear in the Team Builder lists of all Users of the Talentron account.

Question Bank

Depending on which Talentron plan you are subscribed to, The Question Bank is populated with 10 to 20 Skills and a list of 3 to 5 Interview Questions for each skill. All Users have the ability to add Skills and Questions to the Question Bank via the "Add New Skill" form or via Question Builder.

Note: Skills and Questions entered via the "Add New Skill" form or via the Question Builder appear only in Question Bank belonging to the User who added them.

As Admin, you can upload Skills and Questions to the Question Bank via CSV file. Click on the Question Bank tab in the navigation bar, then click the "Bulk Import via CSV" button in the upper right hand corner of the Question Bank. Be sure to View File Format to make sure the CSV file you are uploading is formatted correctly.

Note: Skills and Questions uploaded via CSV file will appear in the Question Banks of all Users of the Talentron account.