SHL TalentCentral+ Upgrade Guide

iAssess Users

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Welcome to TalentCentral+

TalentCentral+ is an upgrade to your current iAssess platform providing an upgraded user and candidate experience, making it faster and easier to use and access all your SHL assessments and solutions.

What do I need to know?

This guide will focus on the essential information you need to start using your upgraded portal quickly and efficiently. It will highlight updates to terminology, changes to the look and feel of your platform and guide you through the key modifications that may impact your usual activities.

You will still have access to all your existing assessments, reports and insights in our new interface making it even faster to make talent decisions. Your login details and user permissions also remain unchanged.

What's new?

You will have access to SHLs latest innovations and benefits including:

- Capability to create your own custom assessment workflows with stages and progression criteria.
- Multi-lingual support for recruiter and evaluator experience.

Depending on your contract you may also have access to:

- SHL Experiences which provide an engaging, personalized, and superior candidate experience. Your upgrade to TalentCentral+ gives you access to the SHL Basic candidate workflow.

- Access to our market-leading product catalogue including content such as OPQ and Verify.

Please speak with your SHL representative for further information.

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TalentCentral+ Terminology

As part of the upgrade, some of the language that you are used to seeing in your recruiter portal has been updated. The main changes are listed below:

I-Assess	Description	TalentCentral +
Modules	Assessments & reports used for a particular recruitment/development drive	Assessments
Assessments	Contain assessments, reports, dates, emails, people	Projects
Recruiters	Individuals setting up & managing projects	Project Administrators
Custom Templates	Customisable email templates & participant messaging	Communication
Participant Details Form	Customisable form used to gather participant biodata	Application Form
Validity	The period of time assessments are valid for	Fixed Date
User Management	Create & manage users and user groups	Company Settings

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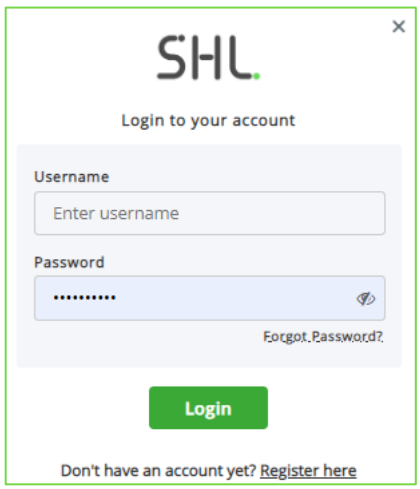
Logging In

To access TalentCentral+ continue to use the same URL for iAssess.

Server	URL
US	https://employer.aspiringminds.com/
EU	https://eu-employer.aspiringminds.com/
AU	https://au-employer.aspiringminds.com/
CN	https://employer.aspiringminds.cn/

Your login and credentials will remain unchanged.

To sign in:



Enter your *existing username* and *password*

Click *Login*

If you have not been provided with login credentials, please contact **TCPlus-Support@shl.com**

User Roles

Existing user roles and permissions are unchanged.

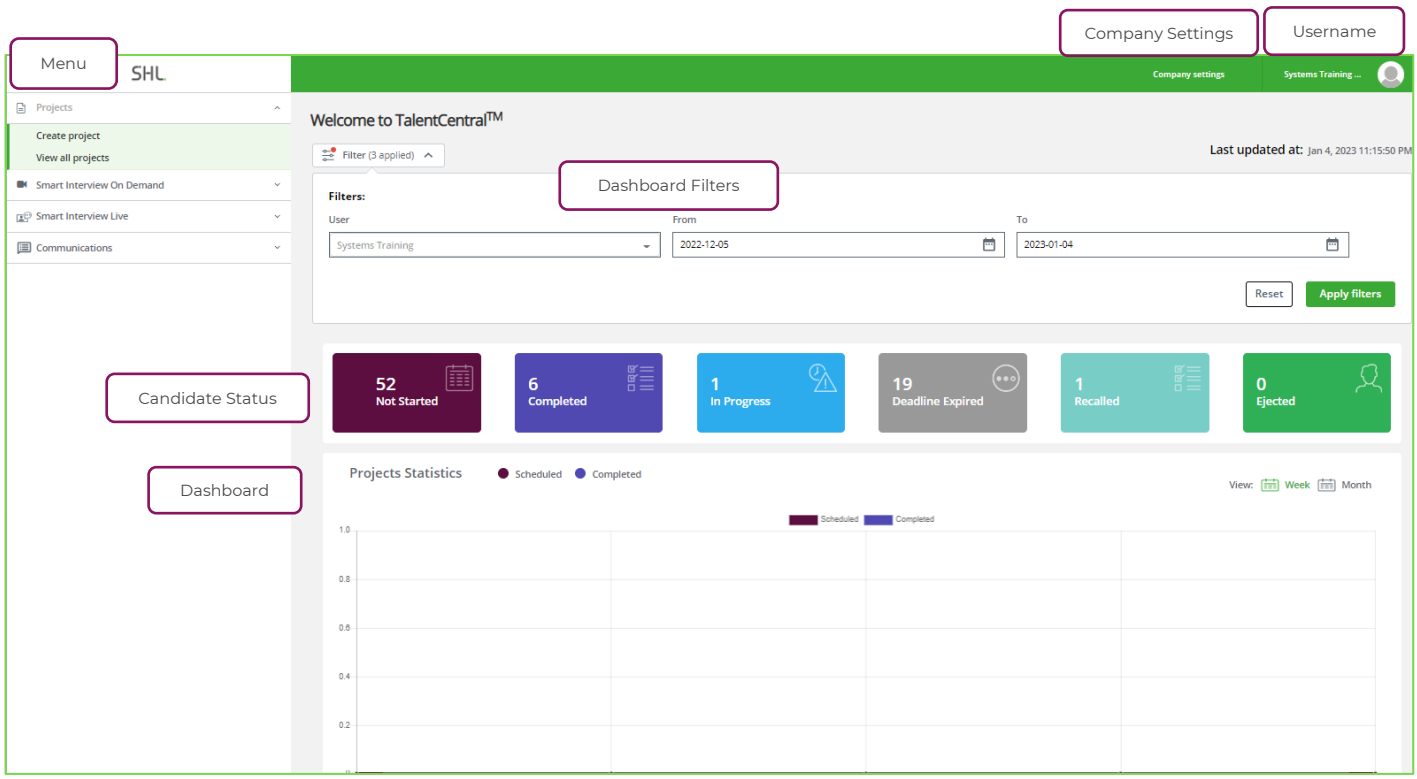
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Navigating TalentCentral+

Homepage

Once you have logged into TalentCentral+ your homepage will be your starting point. Here you will start to see changes in terminology. You can navigate from here to key areas:

- Menu, Company Settings, User profile, Candidate Status and Dashboard



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Key Changes to Homepage:

Let's look at the main differences on the home page:

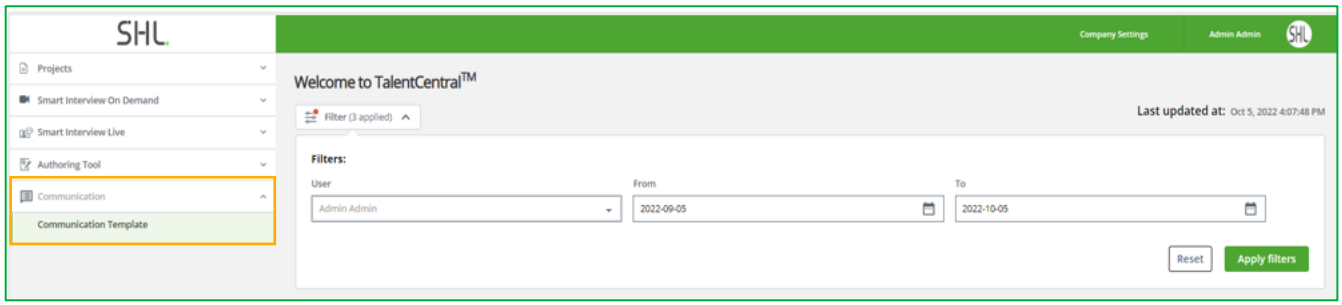
Menu: the first thing to notice is changes to names of some menu items.

Old	Definition	New
Assessments	Contain assessments, reports, dates, emails, candidates etc.	Projects
Video Assessments	On demand video interview tools	Smart Interview on Demand
CodeMeet/ SmartMeet	Live video interview tools	Smart Interview Live

Company Settings[New]: can be used to create new user roles, manage users and user groups.



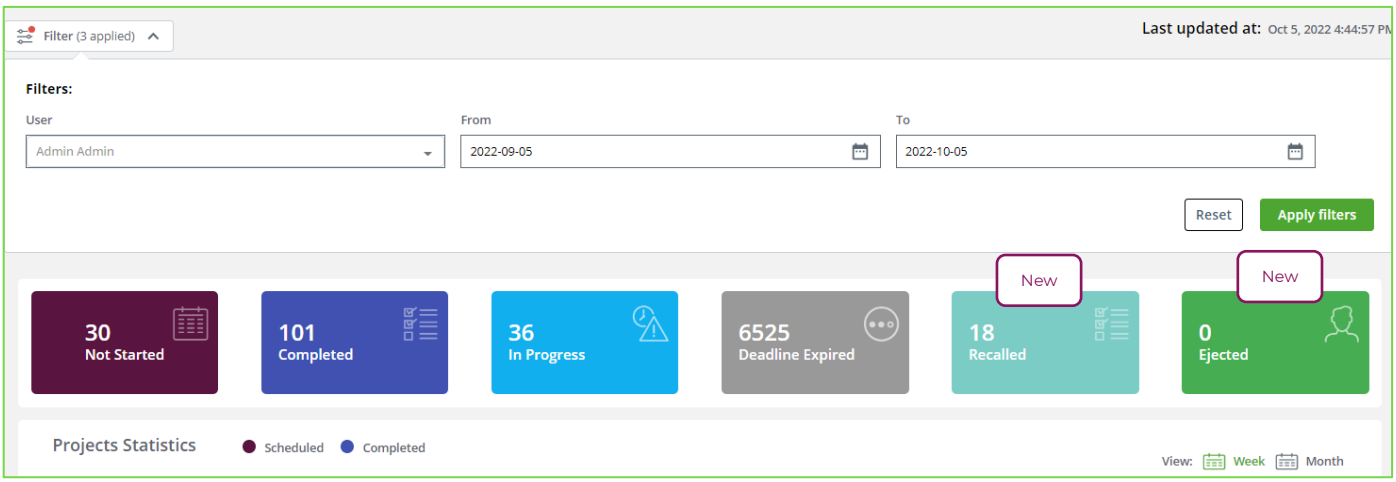
Communication[New]: Depending on your system configuration, you may have access to *Communication.* This feature can be used to create and manage email templates and *participant messaging*[NEW]



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Dashboard tiles: These give a quick overview of participants' progress.

Most tiles you will recognize from iAssess. Some have been removed and replaced with new tiles.



Dashboard Tile Definitions

Old	Definition	New
Scheduled	Number of participants who have not started their assessments	Not Started
Completed	Number of participants who have completed their assessments	Completed
In Progress	Number of participants who have started but not completed their assessments	In Progress
Expired	Number of candidates whose assessments have passed their deadline date	Deadline Expired[NEW]
Pending	Number of candidates who are yet to start assessments	*Not Applicable*
Strong Consider	Number of candidates who have completed assessments & cleared the cut off set	*Not Applicable*
Not Applicable	Number of candidates who have not started & whose links have been recalled.	Recalled[NEW]
Not Applicable	Number of candidates logged out of assessments, for violating anti-cheating features & exceeding proctoring thresholds	Ejected[NEW]

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Projects

New Terminology Alert! ***Assessments*** are now called ***Projects***.

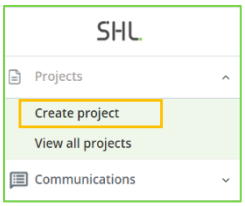
On iAssess projects (previously known as assessments) may have been created for you by SHL. Depending on your user role, on TalentCentral+ you may now be able to create your own projects.

Project Workflow

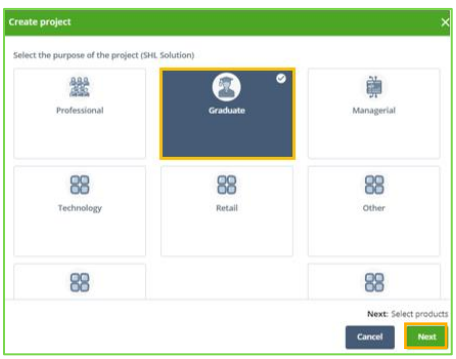
The end-to-end project workflow has four distinct sections:

Assessment Workflow	Participant Experience	Review & Publish	Add People
Select, Configure & Add Products, Define Stages & Banding	Configure Assessment Delivery, Select Onscreen Messages, Create/Configure Application Form, & Set Proctoring	Review, Select Administrators, Set Administrator Notifications, Add Project Tags and Bookmark Project (if required)	Invite Participants, Create Participants, Set Deadlines, Manage Participant & Admin Communication

Creating a project



To create a new project, click on ***Create Project*** in the Projects menu.



Depending on the products your organisation has purchased, you may be asked to select the purpose of your project.

For Solutions products select the name of the Solution E.g.: *Graduate*

For all Non-solution products select *Other*

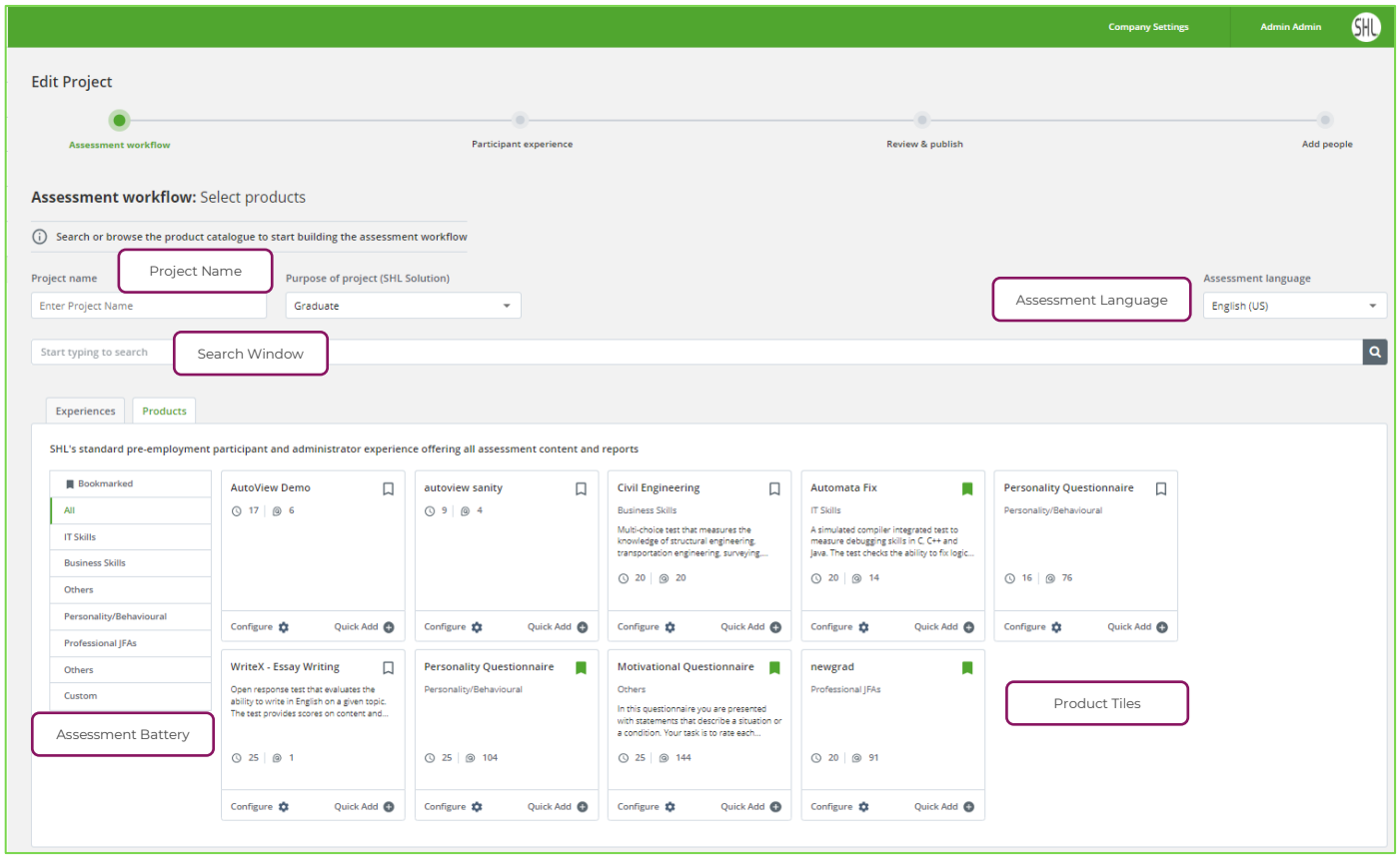
Click ***Next***

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Assessment Workflow

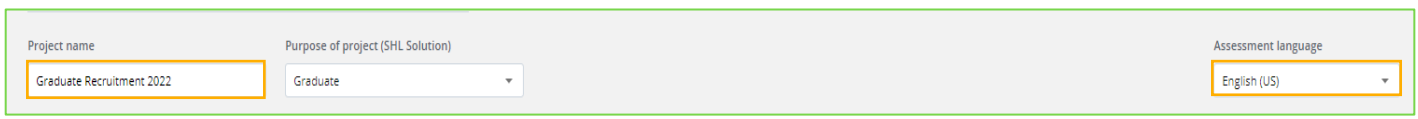
The assessment workflow allows you to select and configure assessments and related reports you would like the participant to take. Familiarize yourself with the screen below where some of the key elements have been highlighted:

- Project Name, Assessment Language, Search Window, Assessment Battery and Product Tiles.



New Terminology Alert! ***Modules*** are now called ***Assessments.***

Project Name & Assessment Language:



Enter the Project name e.g., *Graduate Recruitment 2022*

Select the Assessment language e.g., *English (US)*

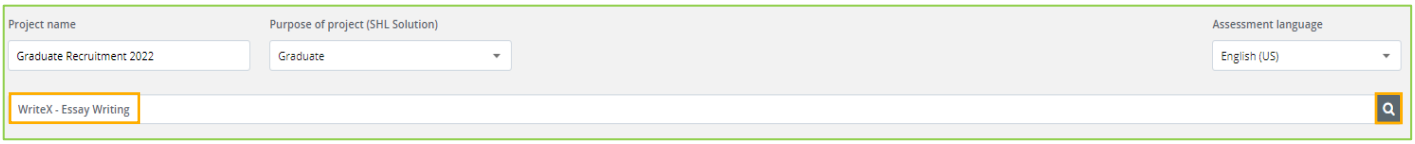
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Locating Products

By default, the products tab will be open on your screen. There are 2 ways to find products, either from the ***search window*** or by browsing the ***assessment battery menu.***

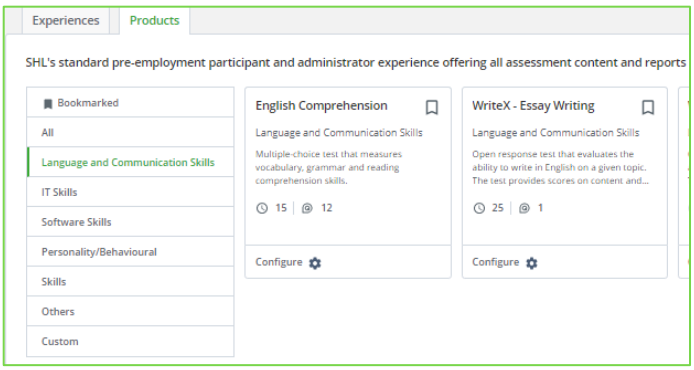
Search Window:

Enter the product name e.g., *WriteX-Essay Writing* and click ***magnifying glass*** to see the search results.

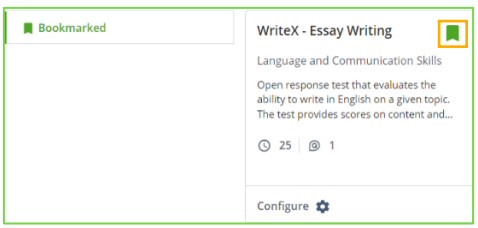


Assessment Battery Menu:

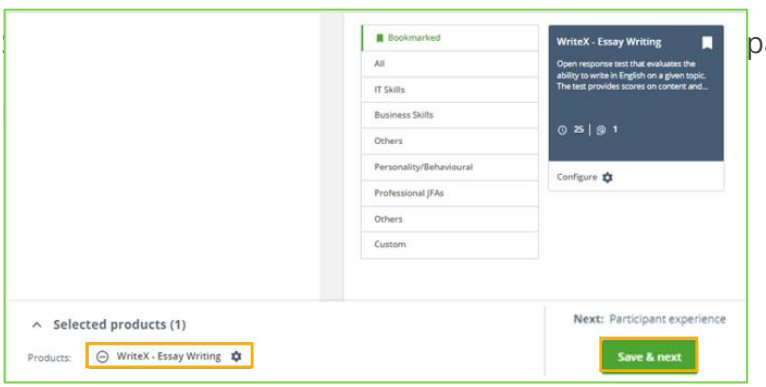
Similar products are grouped into assessment batteries based on commonality such as IT Skills . Click on the relevant battery to see details of the assessments contained within e.g., *Others*.



Click on the desired product tile to make your selection.
To configure the assessment language, click *Configure*
Adjust as required and Add *to Project* to continue.
Assessments with comparisons groups or additional report options can also be configured here.



To *Bookmark* a product as a favourite, check the bookmark icon. You will now find this product in the Bookmarked Battery



page.

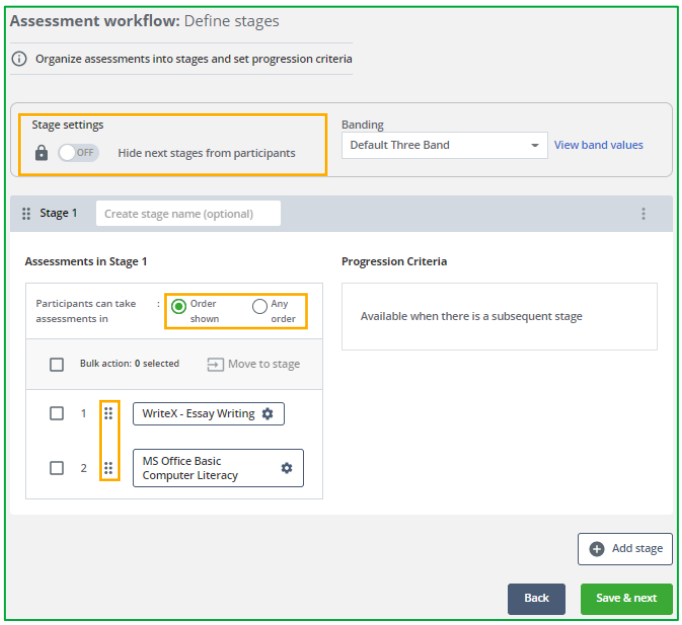
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Define Stages

Define Stages includes two features – Stage Settings and Banding.

Stage Settings

Depending on your system configuration you may have the ability to add multiple stages to your project. By default, projects will be configured with only one stage and with *Stage settings* set to *OFF*.



To determine the order that participant will complete assessments check the radio button *Order shown*.

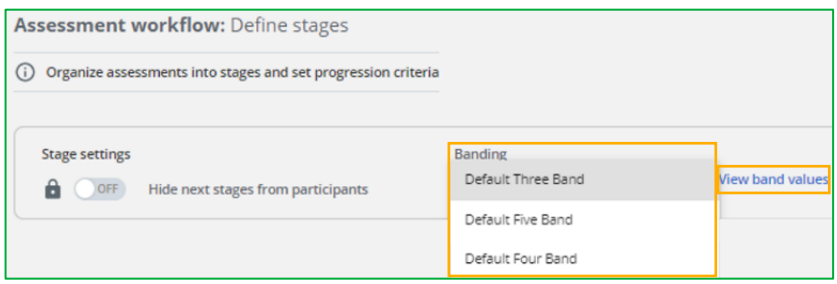
To allow participant to complete assessments in the order of their choice select *Any order*.

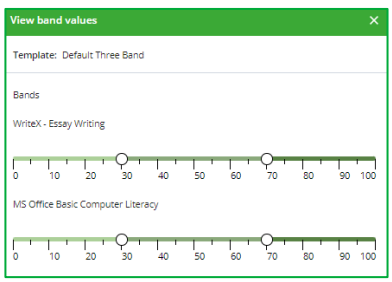
Use ⠿ to adjust to the desired order.

Banding

Banding parameters can be set at project level.

Click on *Banding* to choose the required band. To view the band values for the chosen assessments, select *View band values*





Click on *Save & next*

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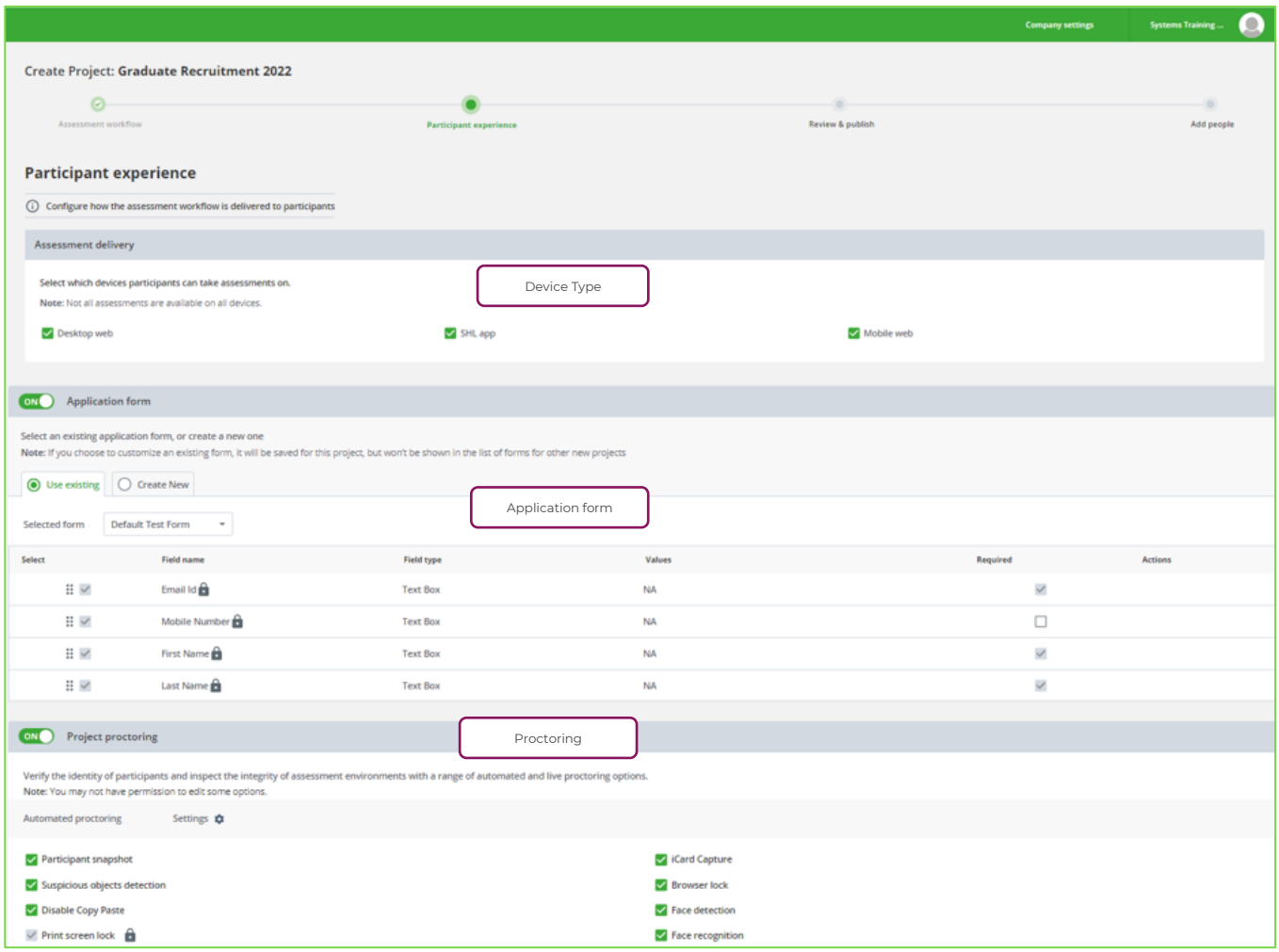
Participant Experience

New Terminology Alert! ***Environment*** is now known as ***Participant Experience.***

Participant experience allows you to configure how the assessment workflow is delivered to participants for this project.

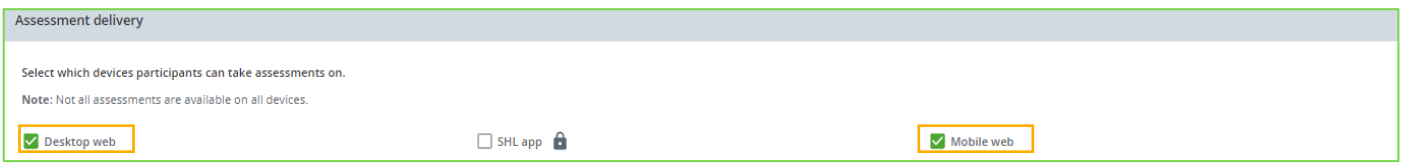
Familiarize yourself with the screen below where some of the key elements have been highlighted:

- Device Type, Application form, Proctoring



Assessment Delivery:

Select the device type participants can use to complete the assessment e.g., *Desktop web, Mobile web*

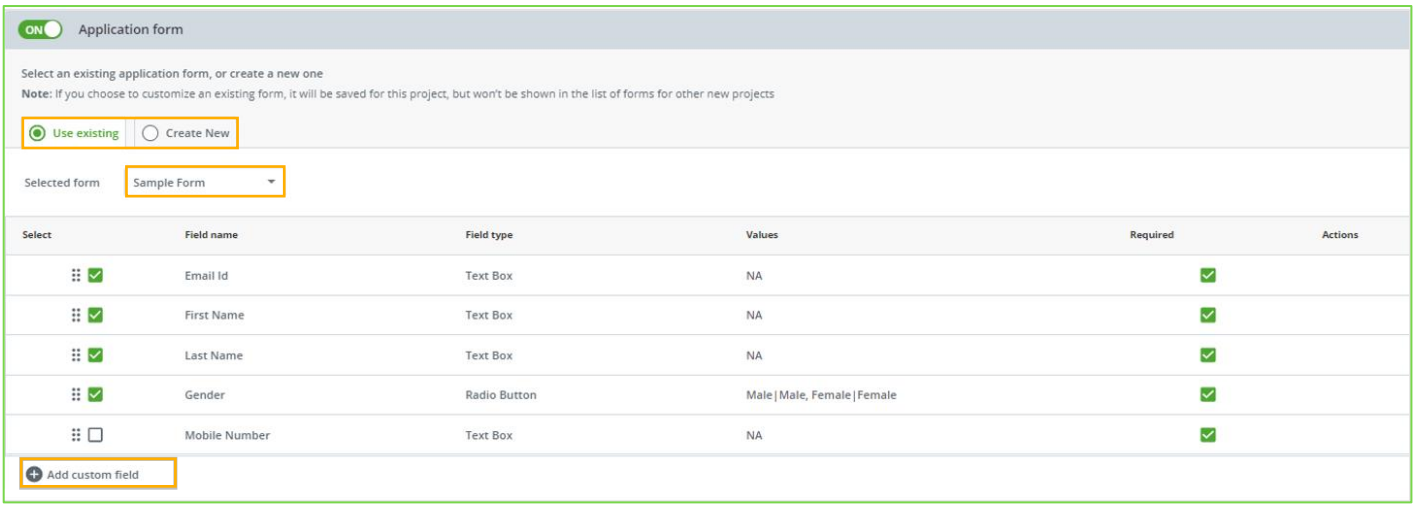


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Application form:

New Terminology Alert! ***Participant details form*** is now known as ***Application Form***

Click ON to enable the application form feature.



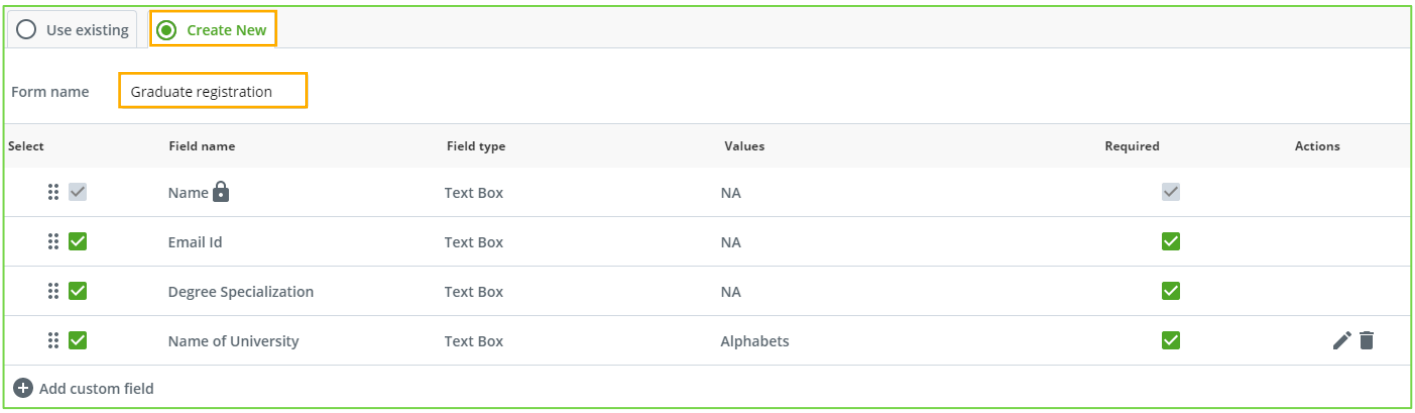
Select *Use existing* to use an existing template and select the required template from the drop-down menu.

To customise existing templates, click *Add custom field*

Fields marked in the *select column* will appear on the application form. Fields marked under the *required column* will be mandatory for the participant to complete.

To create a new application form, select *Create New* and complete the *Form Name.*

Select the required fields as before and drag them into the required position.

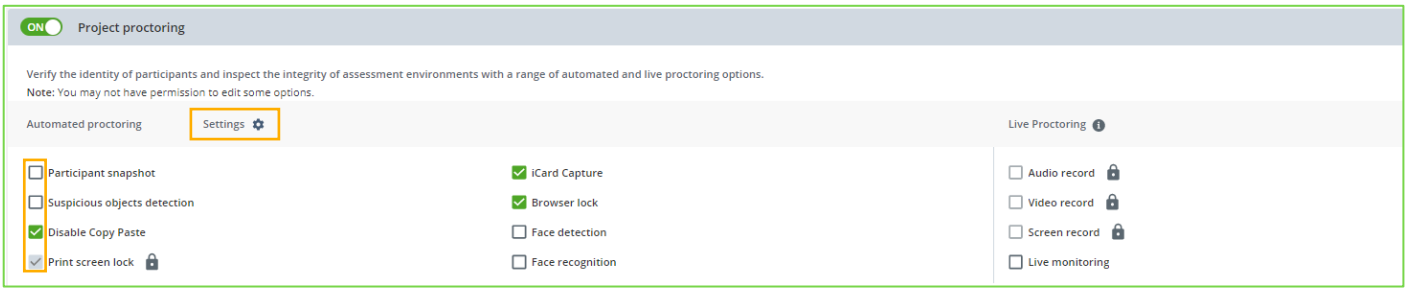


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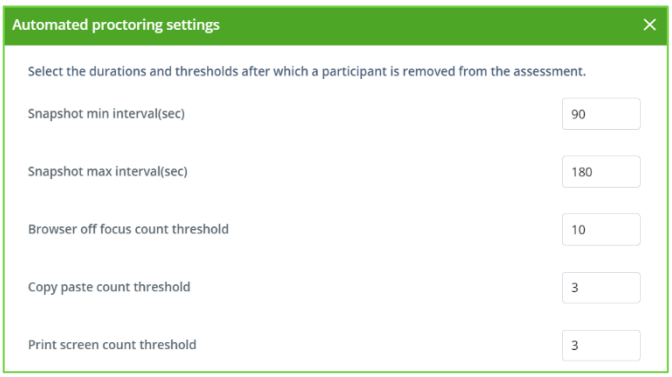
Project Proctoring:

Click ON to enable.

Select the check box to activate specific proctoring features. Deselect the check box to deactivate a feature.



For some proctoring features it is possible to adjust durations and thresholds for participant attempts prior to removal from the assessment. To do this click *Settings* and update the following features:



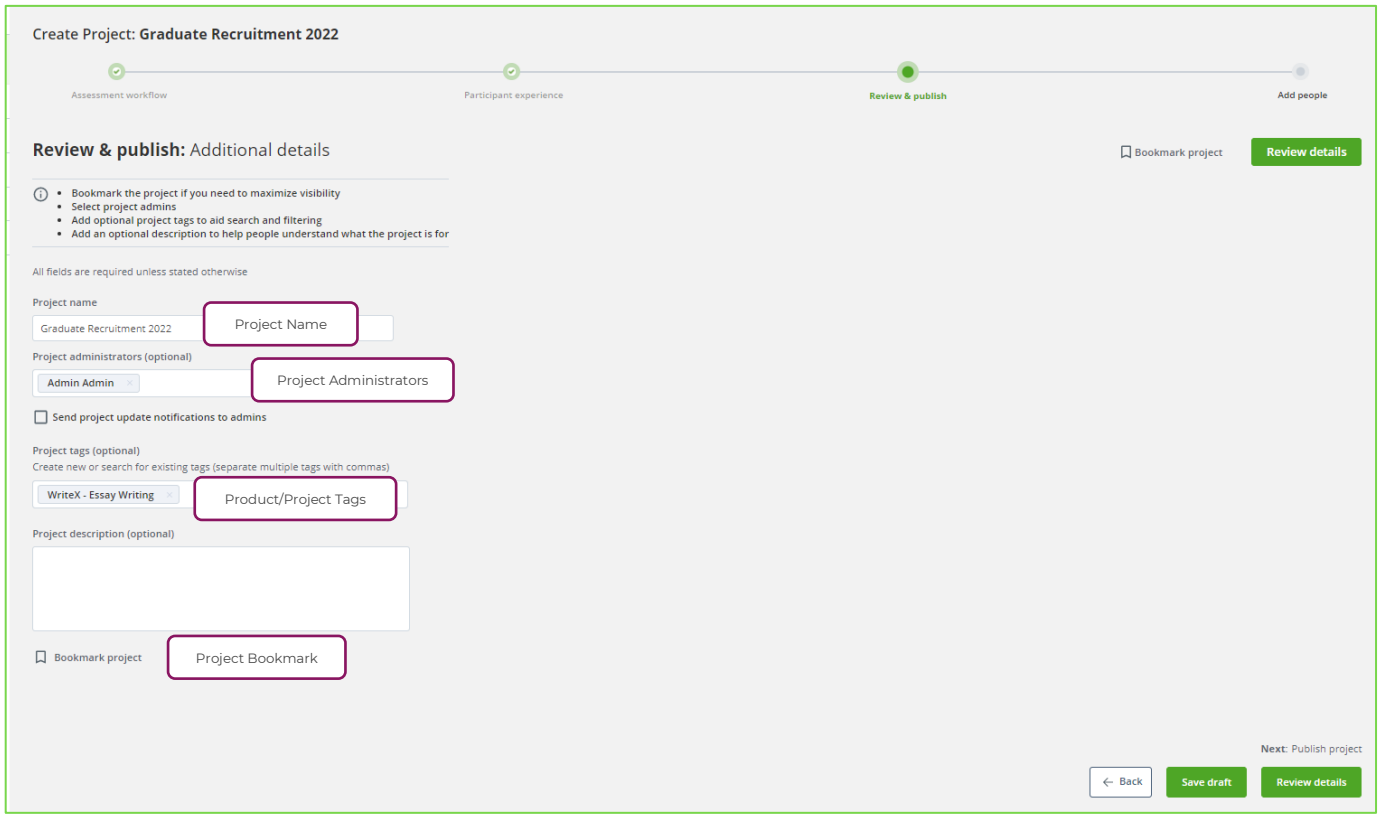
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Review & Publish

Review is the final step in project creation. In this section the project creator can add additional project administrators, manage administrator notifications, create project tags, bookmark projects and review project details. Publishing the project finalises the project for use now or later.

Familiarise yourself with the key elements highlighted below:

- Project Name, Project Administrators, Product/Project Tags, Project Bookmark



New Terminology Alert! ***Assessment Name*** is now known as ***Project Name***

Project Administrators ***New:*** Assign a user or user group to your project to restrict who has access and visibility of the project details and data. Use this field to grant specific users access to perform tasks such as review and manage projects.

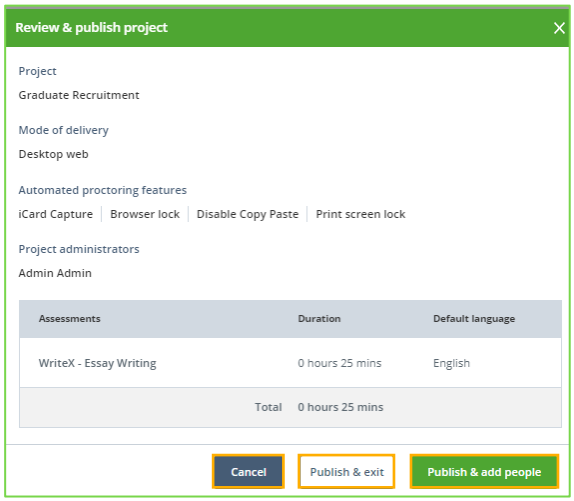
Project Tags: Create or select project tags to filter and organise projects as before.

Project Bookmark: Bookmarking a project will allow you to quickly find the project later.

Save as draft: This feature allows you to return to the project later to review and update as necessary before publishing. Save your project as draft and exit.

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To publish your project click *Review details*. This will open a window where you can complete a final check of your project settings. Be sure to review this carefully as once published you cannot adjust.



To publish your project now, and add participants later click ***Publish* & exit**

To publish now and continue to add participants click on ***Publish & add people***

To return to the R*eview and publish* section click ***Cancel***

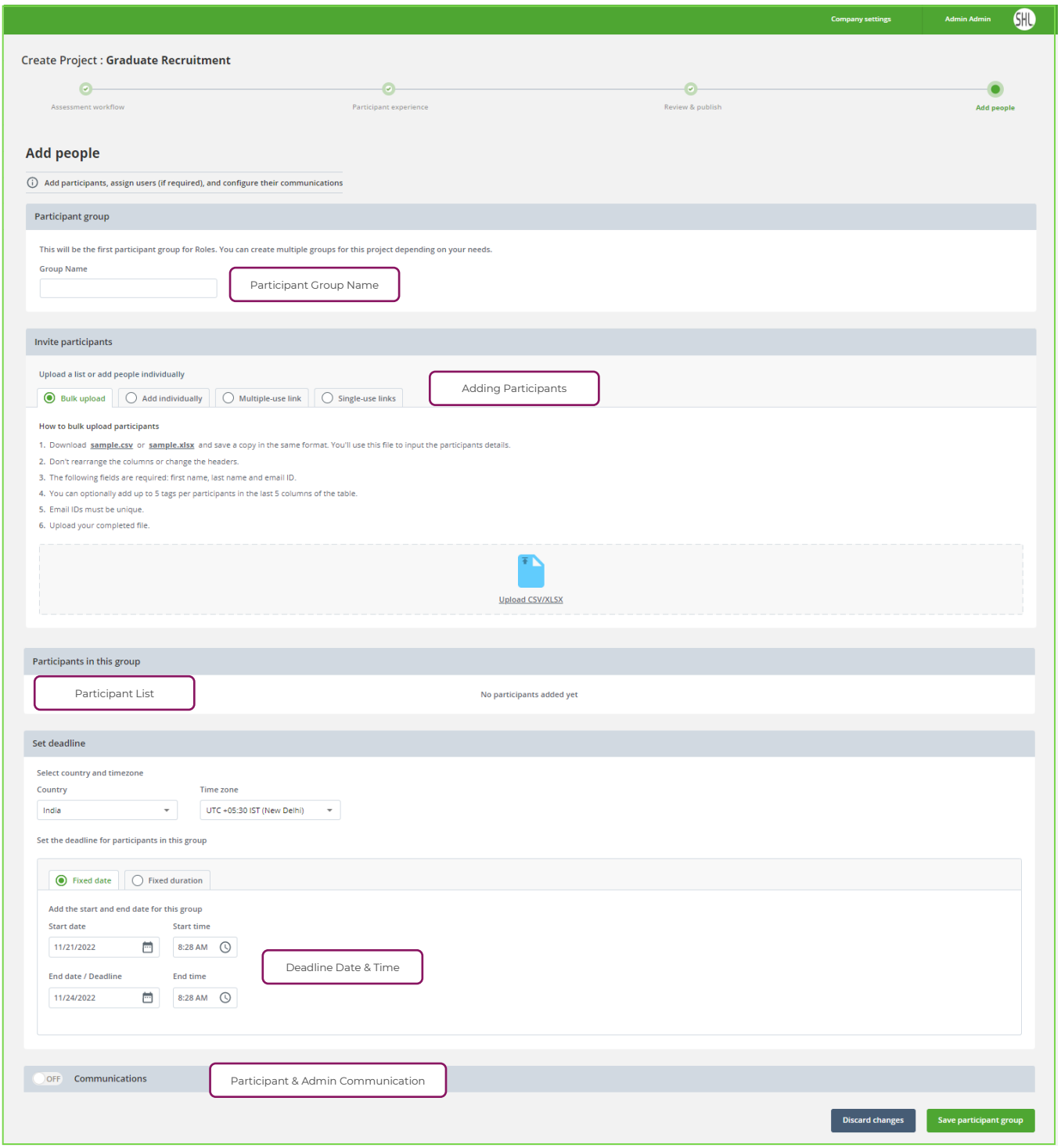
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Add People

New Terminology Alert! ***Scheduling*** is now known as ***Add people.***

Once a project is published you can add participants, evaluators, proctors, set deadlines and configure communications for the project. This is the final stage in the project workflow. Familiarise yourself with the key elements on the screenshot below:

- Participant Group Name, Adding Participants, Participant List, Deadline Date & Time, Participant & Admin Communication



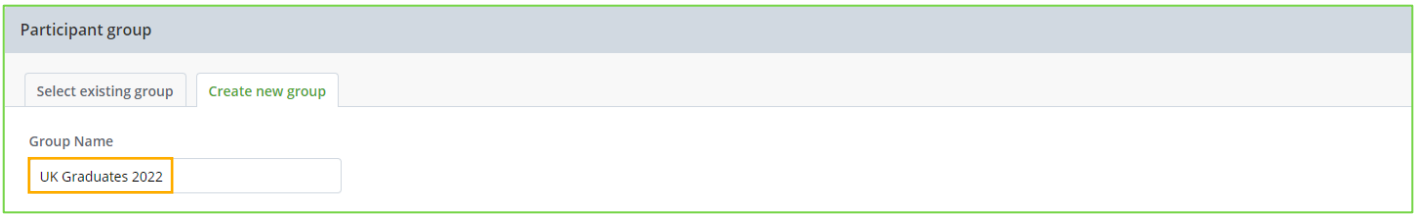
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Participant Group *NEW*:

Organise projects and sift through participant data quickly and easily by creating optional groups of participants on a project. This feature allows you to add groups of participants for easy recognition such as different intake groups or job requisitions.

Create a new participant group by simply adding a group name e.g., *UK Graduates 2022.* You can also select an existing group to add to.

If no group name is entered, a default group will be created for all participants added to the project.



Adding participants:

There are now four ways to invite participants to a project. The *common login* has been removed and replaced with two new options for participants to self-register: *Multi-Use Link* and *Single Use Links*.

The main features of each method are detailed below.

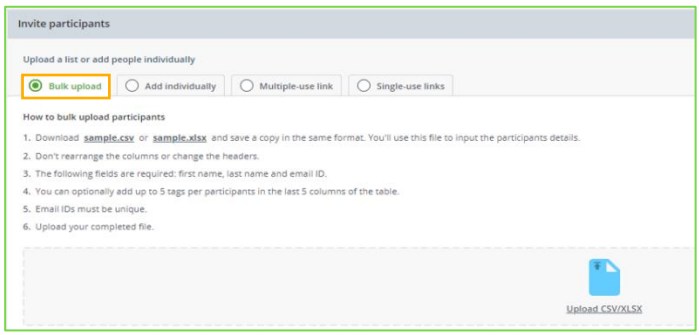
Bulk Upload	Used when you know the names of your candidates and you have a large quantity of them to add in one go. Participant details are added to a spreadsheet and imported. Invitation emails will be sent from TalentCentral+. A maximum of 2000 participants can be uploaded in one file. To add further participants, repeat this step.
Add Individually	Used when you know the names of your participants and would like to invite them to take an assessment. Invitation emails will be sent from TalentCentral+.
Multi-Use Link	Used for multiple participants to self-register for an assessment using the same URL. The URL will not be sent to participants via TalentCentral+ and the administrator is responsible for distributing it.
Single Use Links	The unique link will not be sent to participants via TalentCentral+, and the administrator is responsible for distributing them. Participants will self-register their details prior to completing the assessment.

Choose the method that best suits your needs. You may decide to use more than one method on a project.

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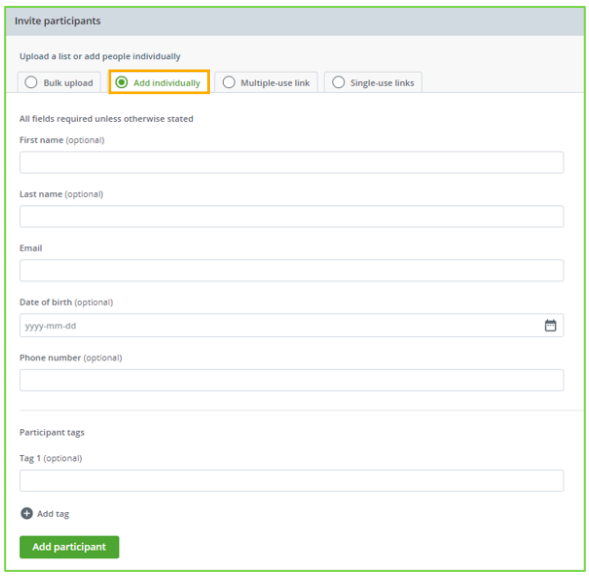
Named Candidates:

Bulk Upload: Add many participants at once using a csv/xlsx file (max of 2000 participants in one file).



Select *Bulk Upload*
Click *sample.csv* or *sample.xlsx* to download and save sample file.
Input participant data and save file.
Click *Upload CSV/XLSX* link to upload data.

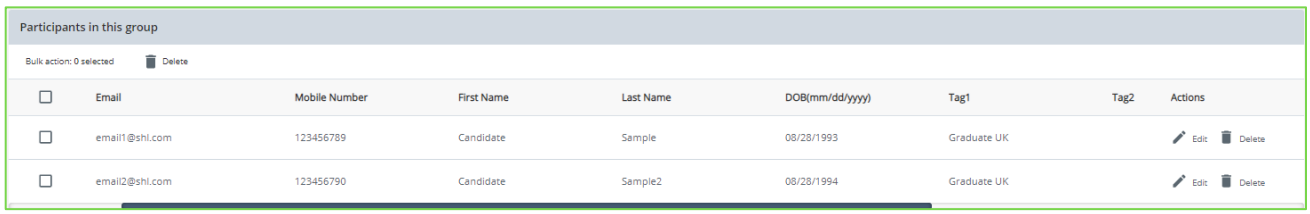
Add Individually: Add named participants one by one.



Select *Add individually*
Complete all relevant fields manually.
Email address is compulsory, but we recommend that you also add first name & last name.
Click *+ Add tag* to add additional tags to your project.
Review participant data and click on *Add participant*

Participants in this group:

People added using the *bulk upload* or *add individually* method (i.e., named participants) will then appear in the next section *Participants in this group*

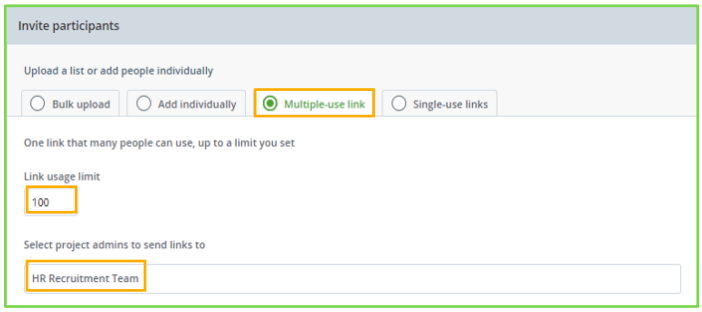


Note: Proctors and evaluators can also be added using the bulk upload or add individually options, when relevant features and products are enabled.

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Un-named Candidates:

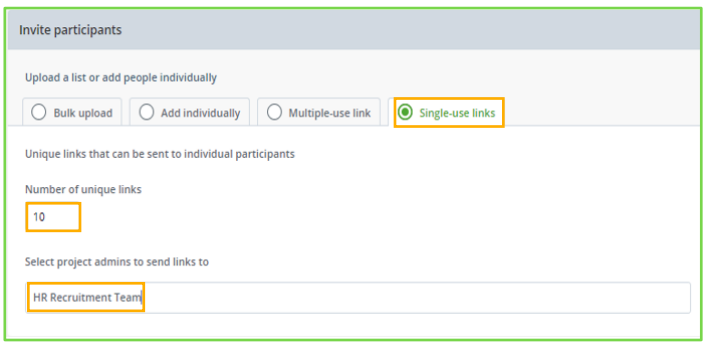
Multiple-use link: Allow multiple candidates to self-register for an assessment using a single URL.



Select *Multiple-use link*
Set the maximum number of participants allowed to use the link. E.g.: *100*
Add project administrators who should receive the link. E.g.: *HR Recruitment Team*

Note: Multiple-use link, are **not** sent via TalentCentral+.
Project administrators are responsible for sharing this link.
A multiple-use link will be generated once the participant group has been saved.

Single-use links: Create unique links to send to individual candidates for self-registration



Select *Single-use links*
Set the maximum number of links you wish to create. E.g.: *10*
Add project administrators who should receive the links. E.g.: *HR Recruitment Team*

Note: The links are **not** sent via TalentCentral+.
Project administrators will be responsible for distributing these as required.
Single-use links are generated and emailed to project administrators once the participant group has been saved.

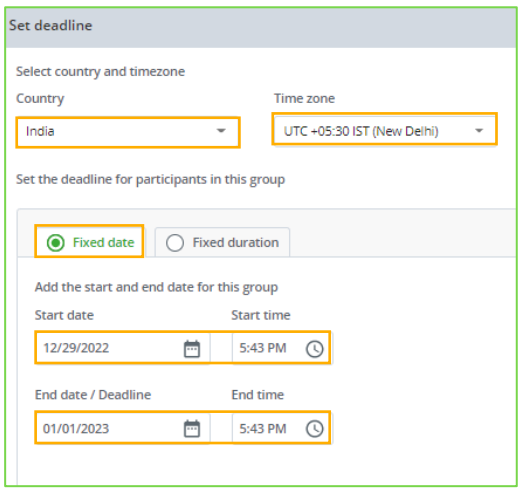
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Set deadline *New*

Set a fixed deadline date or fixed duration for participants in this group.

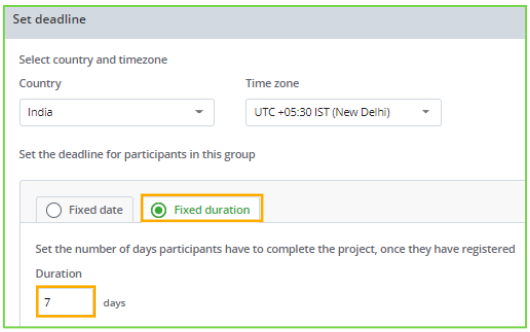
New Terminology Alert! ***Assessment validity*** is now known as ***Set Deadline*** and ***Validity*** is now known as ***Fixed date***

Select the Country and the Time zone as required.



To set the period participant links are valid for, select *Fixed date*.

Specify the start date and time, and the end date and time in the same way that the validity period was specified in iAssess.



To specify a number of days for a participant to complete their assessments select *Fixed duration* *New*.

Enter the permitted number of days. Participants must complete their assessments within this time.

Note: For participants added individually or by bulk upload, this duration will begin when they are confirmed as participants on the project. For participants who are given a multiple use link or single use links, it is important to note that this fixed duration begins only once a participant has registered.

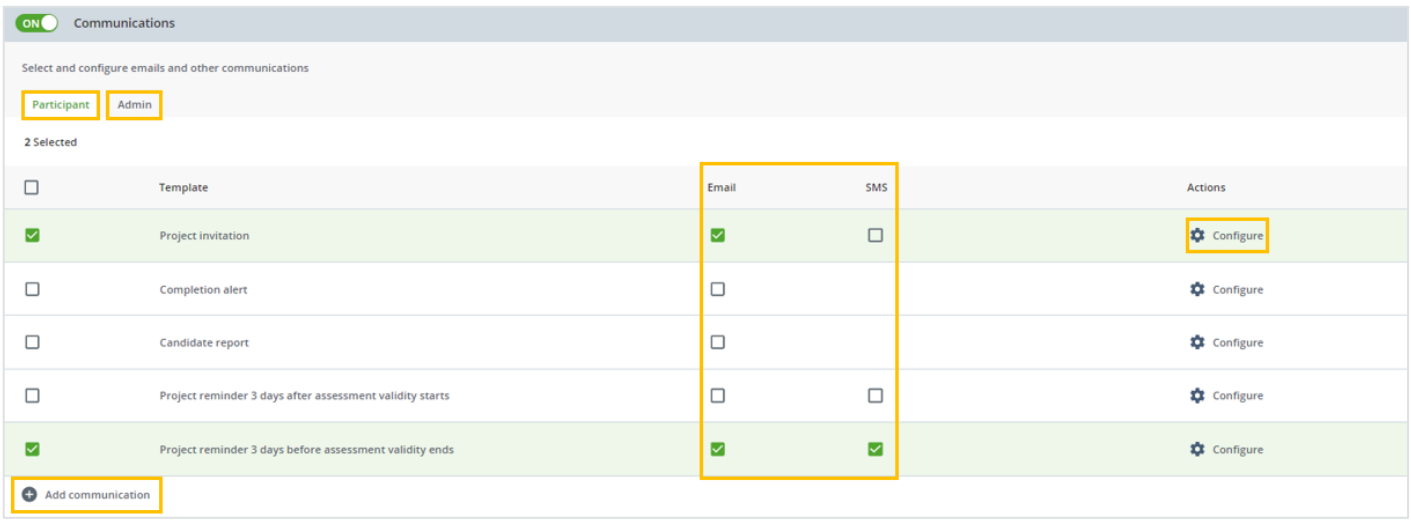
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Communications *New:*

Email notifications can be configured for both participants and project administrators. New additional reminder emails are now available and additional notifications can be added at a project level.

New Terminology Alert! ***Candidate Notification*** is now known as ***Communications***

To enable and send email notification from TalentCentral+ click ON



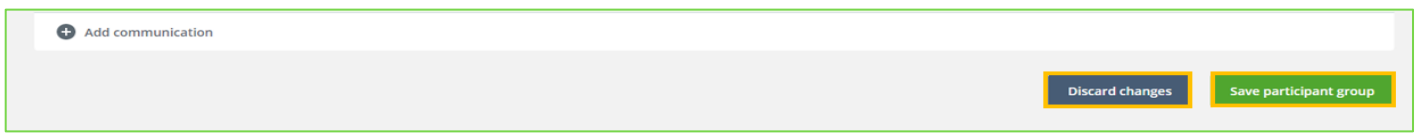
To select email & SMS notifications to be sent to candidates, click *Participant*

To select email & SMS notifications to be sent to project administrators, proctors, interviewers, and evaluators, click *Admin*

Mark the check box in the Email or SMS column, to enable notifications.

To add additional recipients, select and preview templates; click *Configure*

To add additional notification templates, select *Add communication*



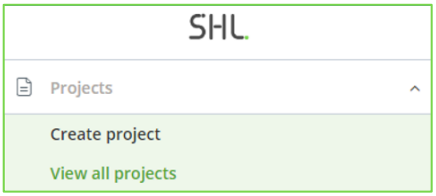
To add participants to the project click *Save participant group.* Named participants will be confirmed on the project and notification emails will be sent. Multi-use/Single Use Links will be generated, and these can be downloaded from the xls sheet that is generated or retrieved by viewing your project and accessing the *additional options menu* which will be covered in the next section.

To cancel/discard any changes made click *Discard changes*

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View All Projects

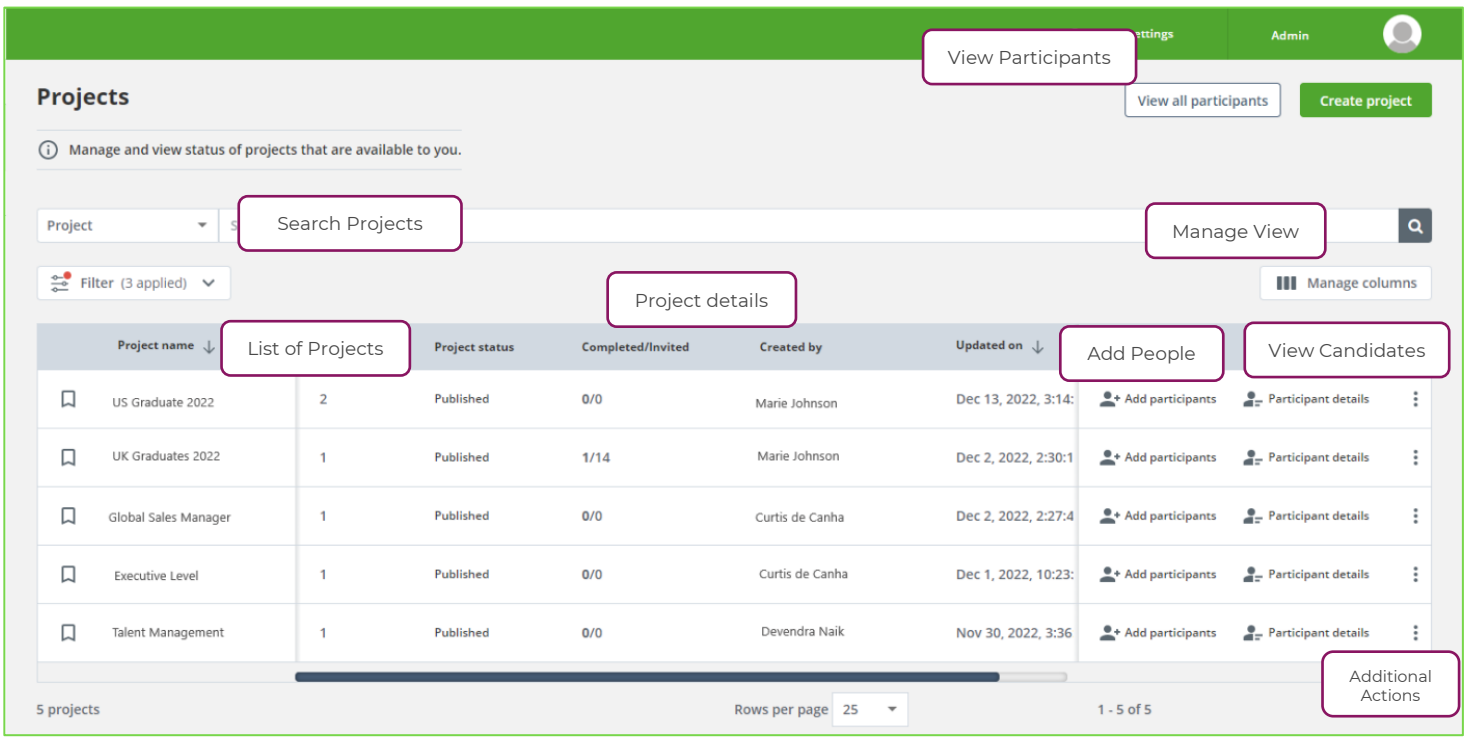
New Terminology Alert! ***My assessments*** are now known as ***View all projects***



To view projects and participant details click *View all* projects from the Projects Menu

Familiarize yourself with the screen below where some of the key elements have been highlighted:

- View Participants, Search Projects, Manage View, List of Projects, Project Details, Add People, View Candidates, Additional Actions.



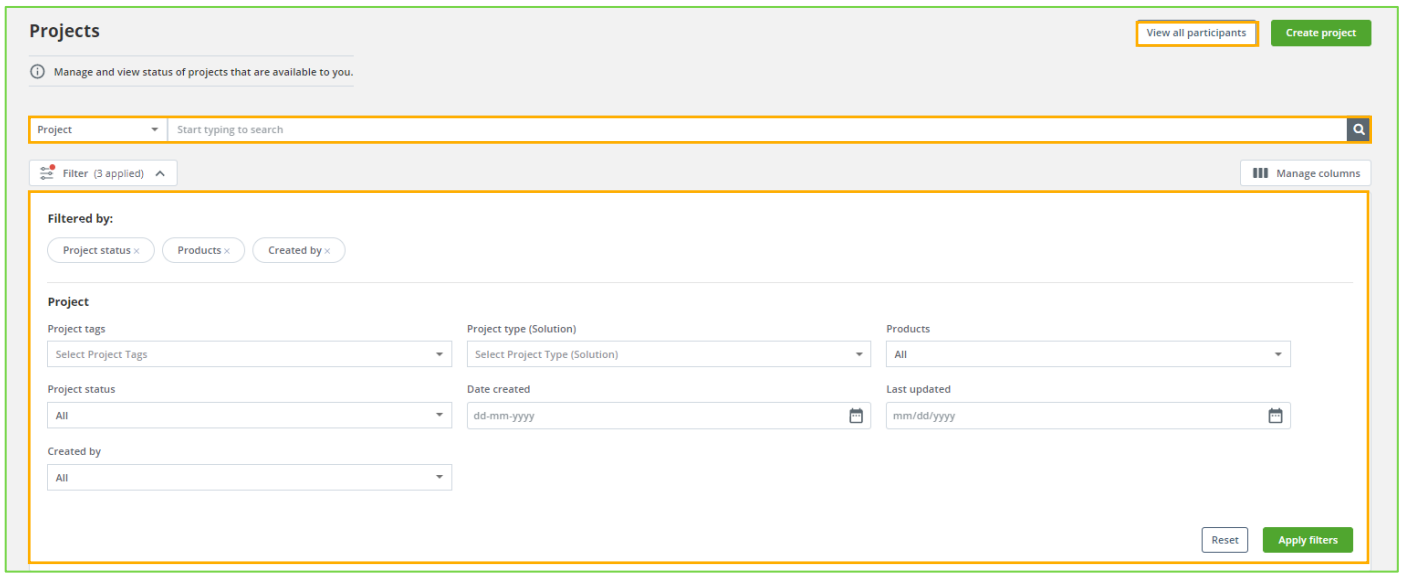
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Key Changes to View All Projects



New Terminology Alert! ***View all candidates*** are now known as ***View all participants***

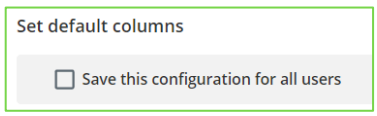
Enhanced *search and filter functionality* allows you to quickly identify the most relevant projects.



Project information has been listed out in a new tabular view. To adjust the information displayed in the view click *Manage columns*.

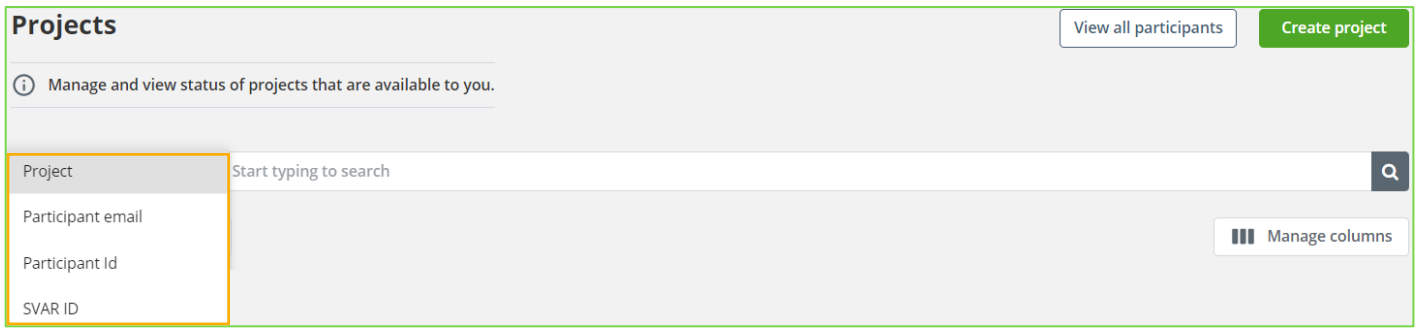


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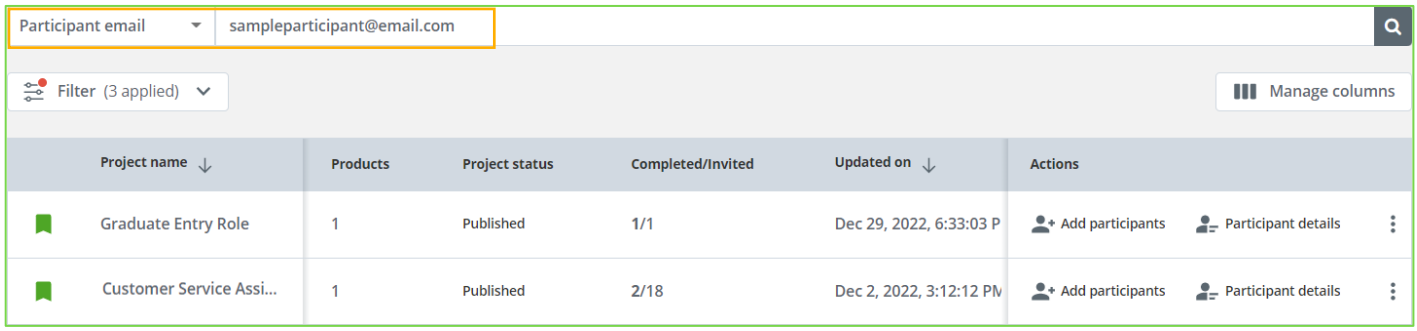


This information can be set for each project administrator or can be saved for all users.

Search all projects for a participant using the following key data:



For example, searching for an email address will list all projects where the email address is found.



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Draft Projects

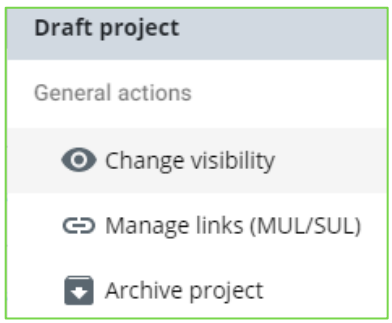
Projects that have not been published will have a Project status of ***Draft***



To edit/publish a draft project select *Edit project*

To clone/copy a draft project select *Copy project*

Access general actions applicable to a draft project by clicking on the *vertical ellipsis menu*



To amend who can access the project select *Change visibility*

To retrieve/deactivate Multiple-use/Single-use links select *Manage links (MUL/SUL)*

Deactivate a project select *Archive project*

Published Projects

Projects that have been published will have a project status of ***Published***

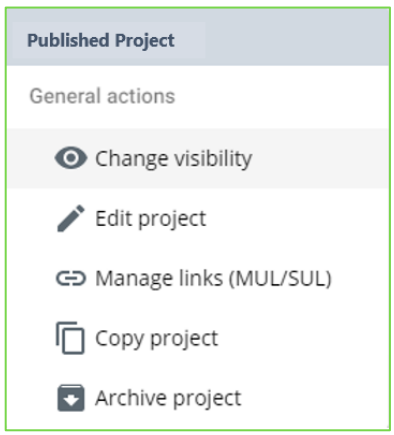


To add people to the project click *Add Participants*

To view/manage existing participants click *Participant details*

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Access general actions applicable to a published project by clicking on the *vertical ellipsis menu* ⋮



To amend project access, select *Change visibility*

To edit the project select *Edit project*

To retrieve/deactivate Multiple-use/Single-use links select *Manage links (MUL/SUL)*

To copy/clone project select *Copy project*

To deactivate a project, select *Archive project*

Archived Projects

When all activities have been completed on a project it can be archived. An archived project will still be visible in view all projects unless this status type is removed from filter options.

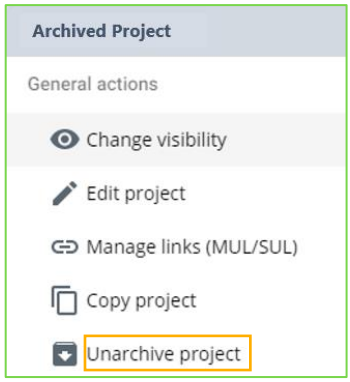


Archiving a project will deactivate *Add participants*

Registered participants can still complete assessments as links are still valid

Unregistered participants (who received Multiple-use/Single-use links and have not yet logged in to complete the registration process) cannot complete assessments as links are invalid

Participant details and results will be available to view/download



To restore an archived project, select ⋮ & Unarchive project

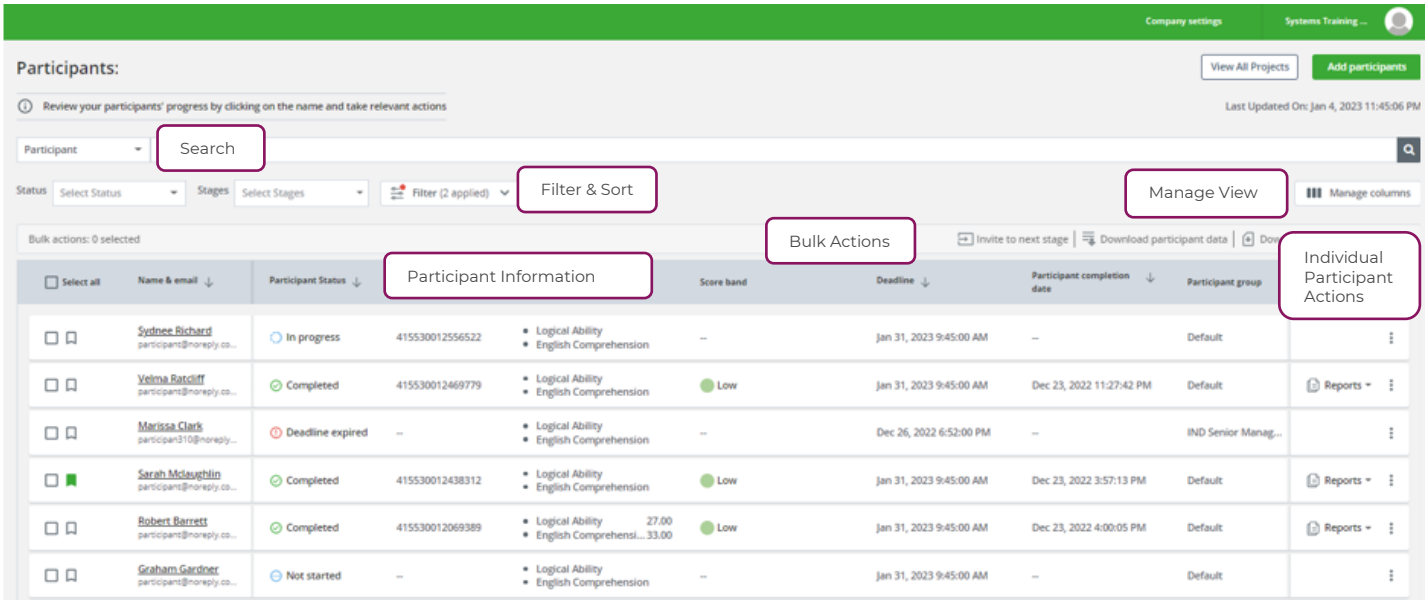
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Participant Details

From the View all projects page, you can access participant details for individual projects or for all projects. Gain useful insights on participants pools, quickly locate and manage participants, and retrieve results all from the Participant Details page.

The screen below highlights some of the key areas:

- Search, Manage view, Filter & Sort, Bulk Actions, Individual Participant Actions, and Participant Information



New Terminology Alert!

View all candidates is now referred to as ***View all participants*** **and**

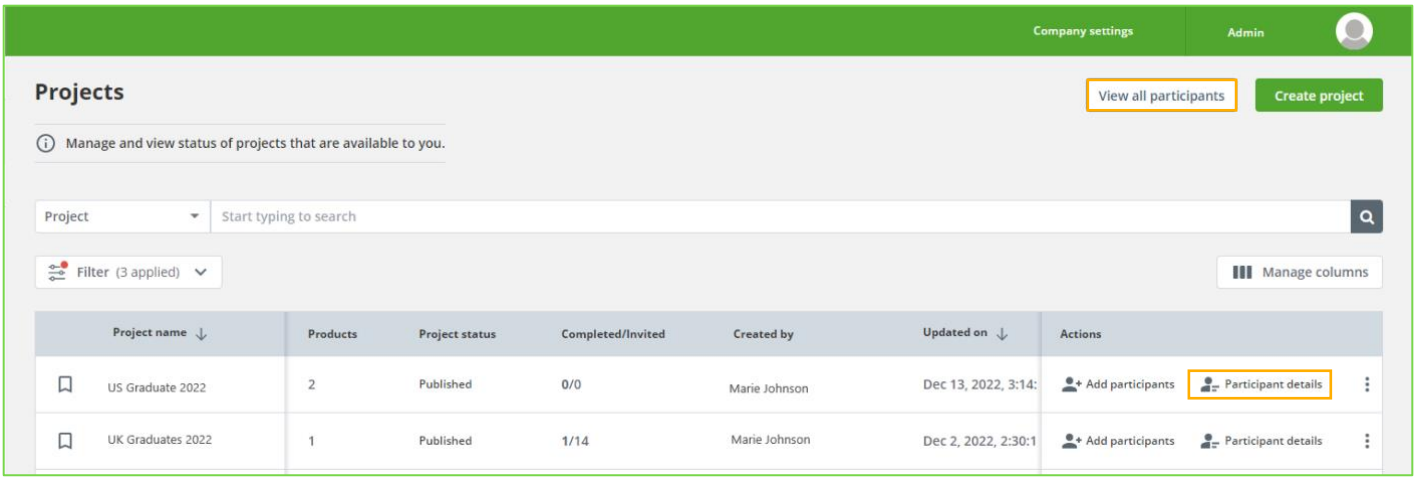
Candidate details are now known as ***Participant details***

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View all participants

To view all participants across all projects click *View all participants*

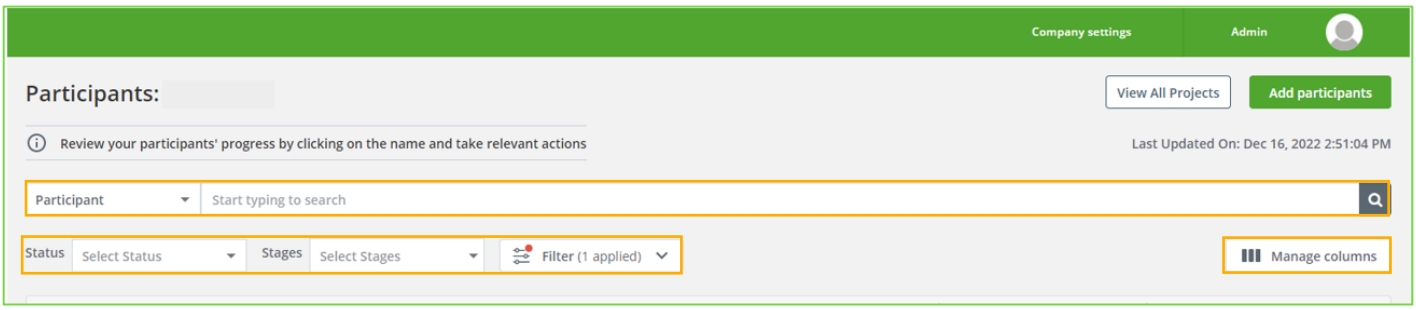
To view participants on a specific project, find the project e.g., *US Graduate 2022* and select *Participant details* in that row.

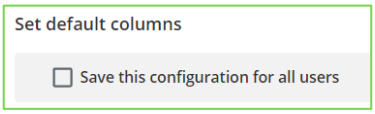


To quickly search for and narrow down the participant list use the *search window* & *filter options*

Note: Search & filter functionalities are available on both the *View All Projects* page and on the *Participants* page.

To adjust the data displayed in the Participant view click *Manage columns*

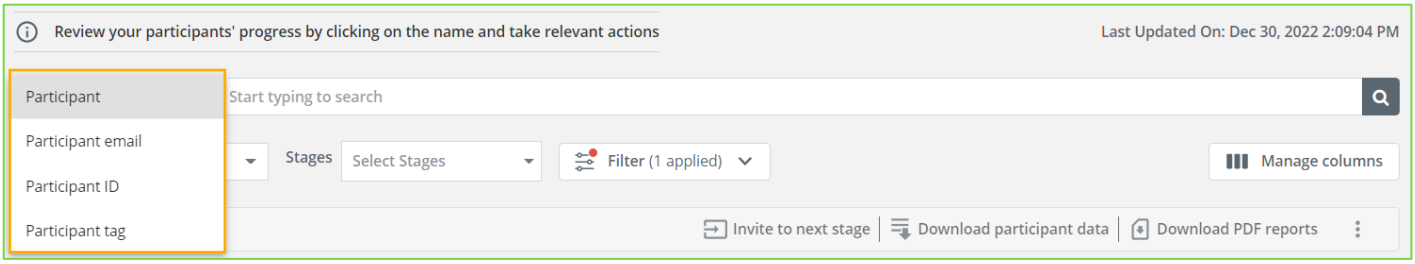




This view can be set for each project administrator or can be saved for all users.

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Search for a participant using the following key data:

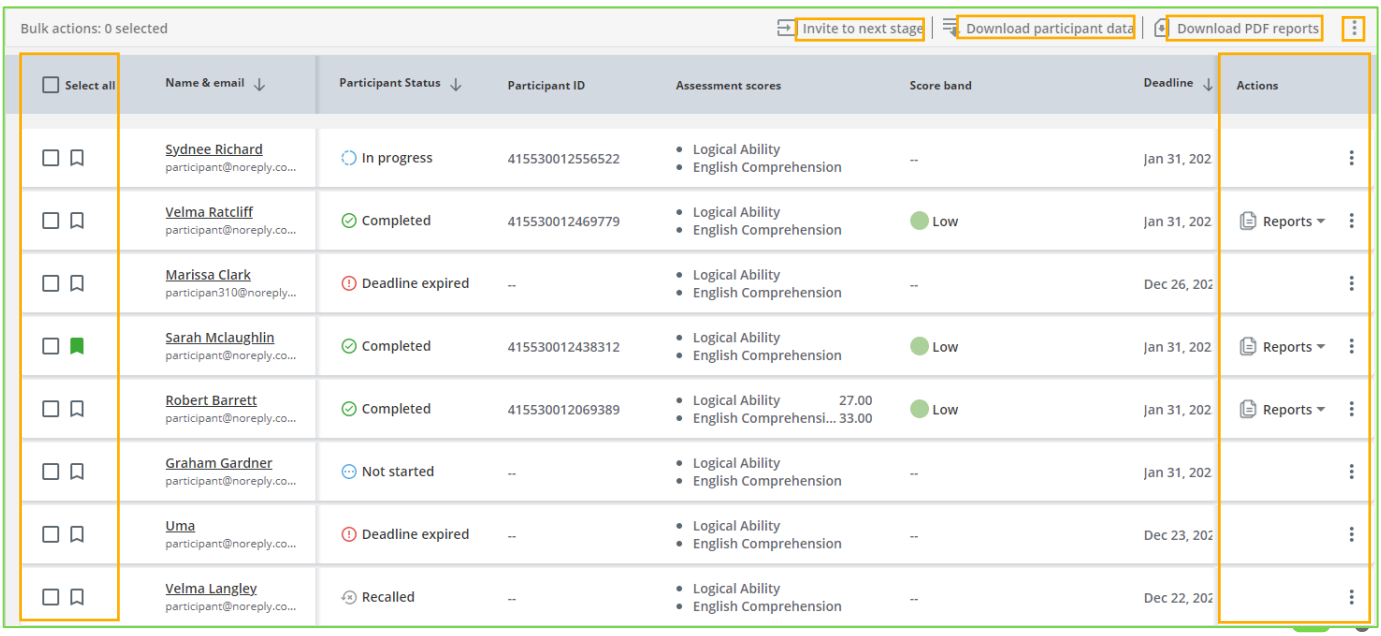


Participant Bulk Actions

To use bulk actions, select all participants or specific individual participants by using the check boxes in the *Select column.*

The participant view has 5 possible bulk actions available, depending on the participant status:

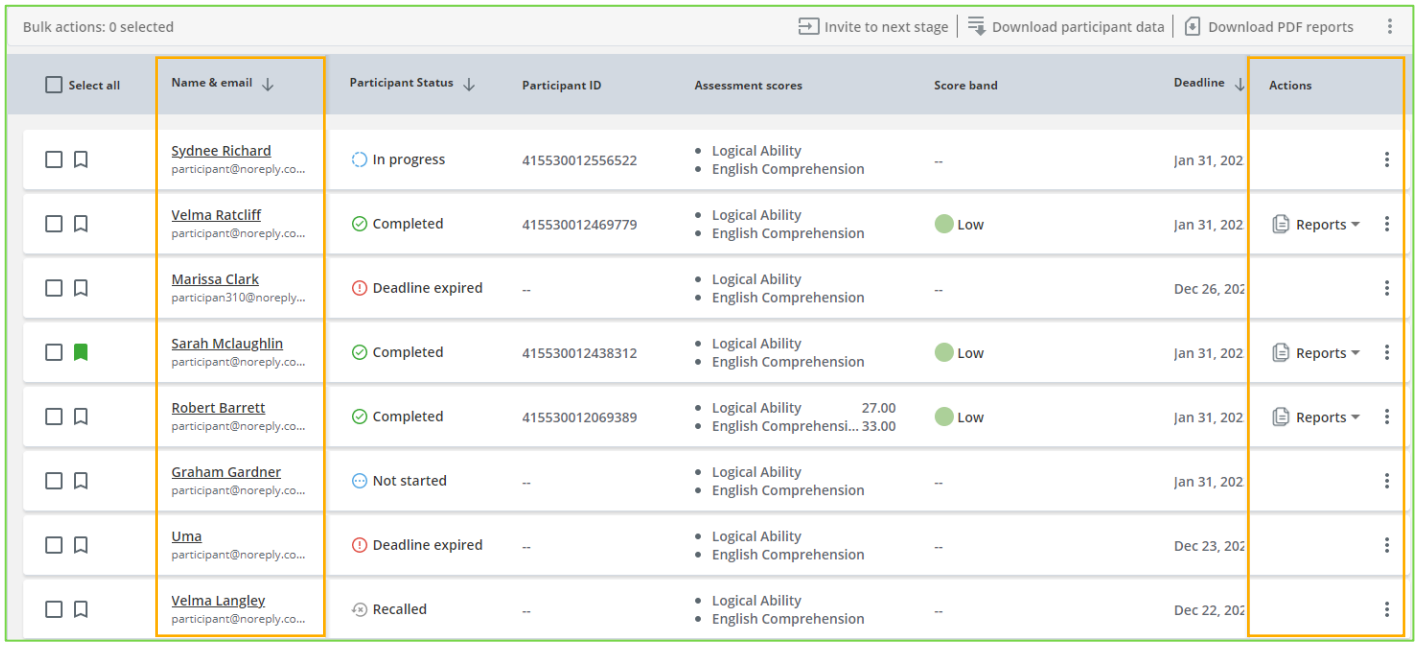
- If staging is used, invite candidates to the next stage of the recruitment process by selecting *Invite to next stage*.
- To export all participant details to excel, including scores and participant statuses, click *Download participant data*.
- To download participant reports click *Download PDF reports*.
- To reschedule participants on a project, click *Menu* ⋮ and *Bulk Schedule*.
- To send reminder emails on a project, click *Menu* ⋮ and *Send Reminder*.



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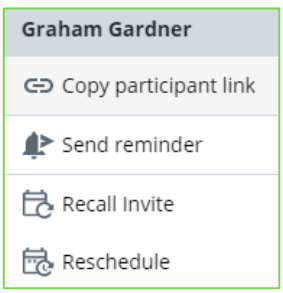
Participant Individual Actions

Several features/functionalities can be actioned from the Actions column for individual participants dependent on Participant status.

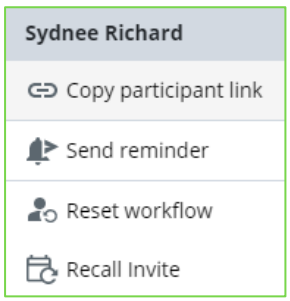


These menu options change dependent on the participant status, and are displayed below:

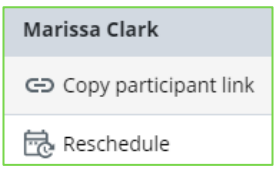
Not started



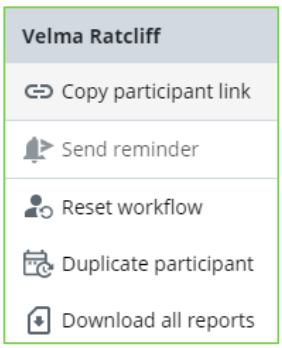
In progress



Deadline expired



Completed

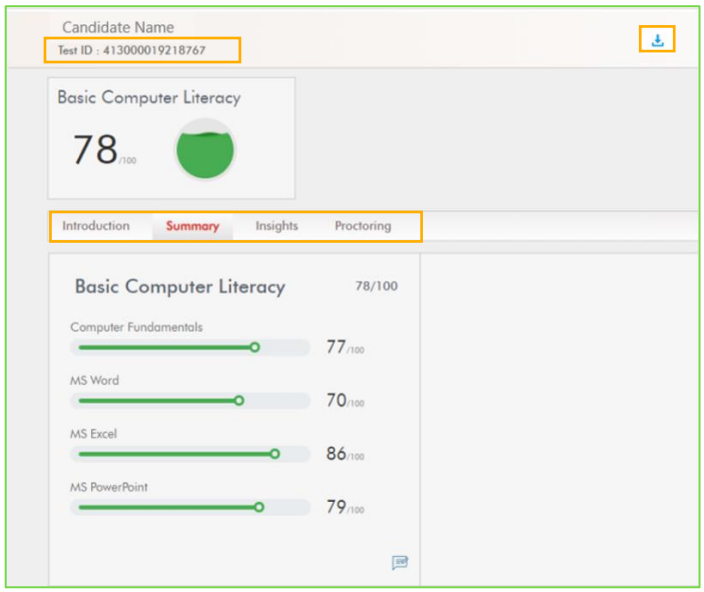


- *Copy participant link* to retrieve and copy participant links.
- *Send reminder* to manually send reminder notifications.
- *Recall Invite* to recall an invitation of a participant who has not started.
- *Reschedule* to change/extend deadlines for completion.
- *Reset workflow* to reset a participant who has started/completed an assessment.
- *Download all reports* to download an individual participant's PDF reports.

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To view reports on-screen click *Reports* and *View Report*

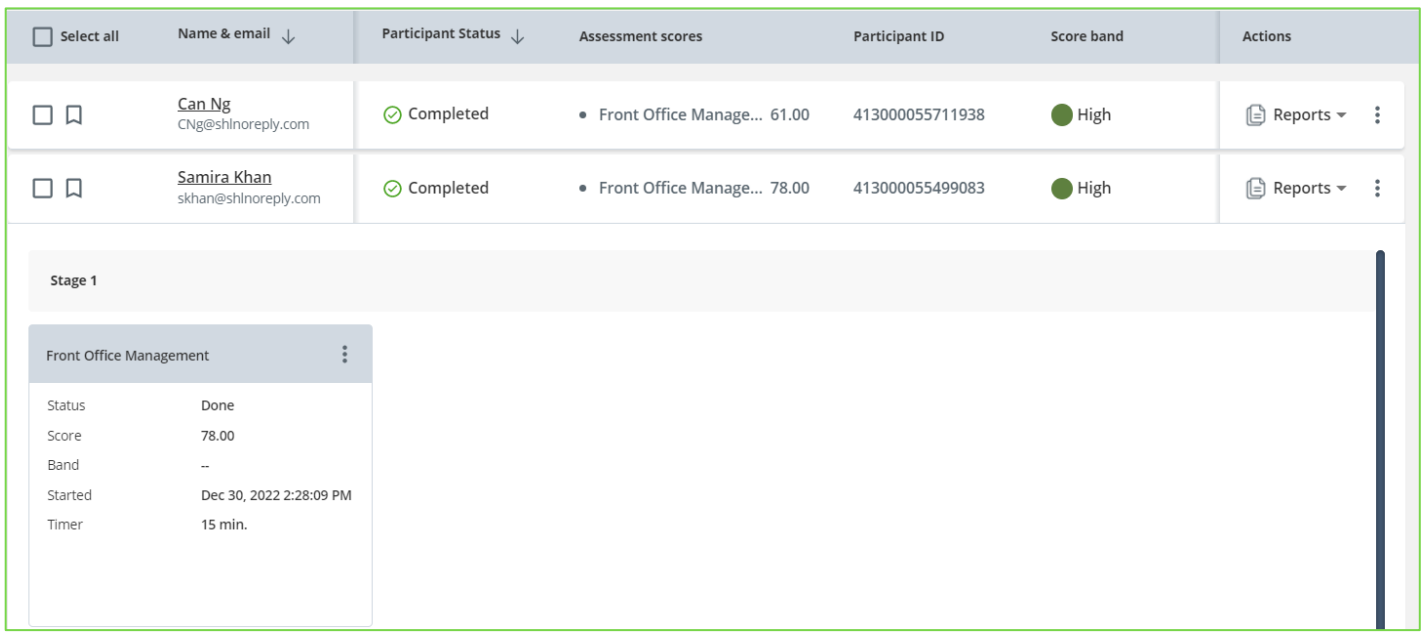
A new tab will open to display the selected participant's on-screen report:



To download the report, click the download icon

Reports can be saved to desktop in PDF format.

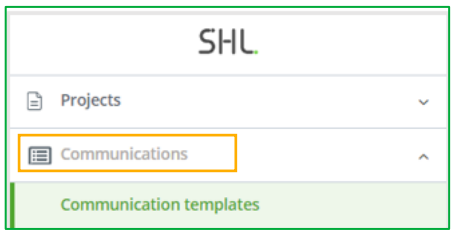
To see the assessment detail for a participant, click the row to expand.



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Communications

This feature allows you to manage your communication to participants and project administrators. It includes Email and SMS notifications.



New Terminology Alert! ***Custom Templates*** are now known as ***Communication Templates***

To select or create Email and SMS notifications to be sent from the platform to participants and project administrators click *Communication Templates*.

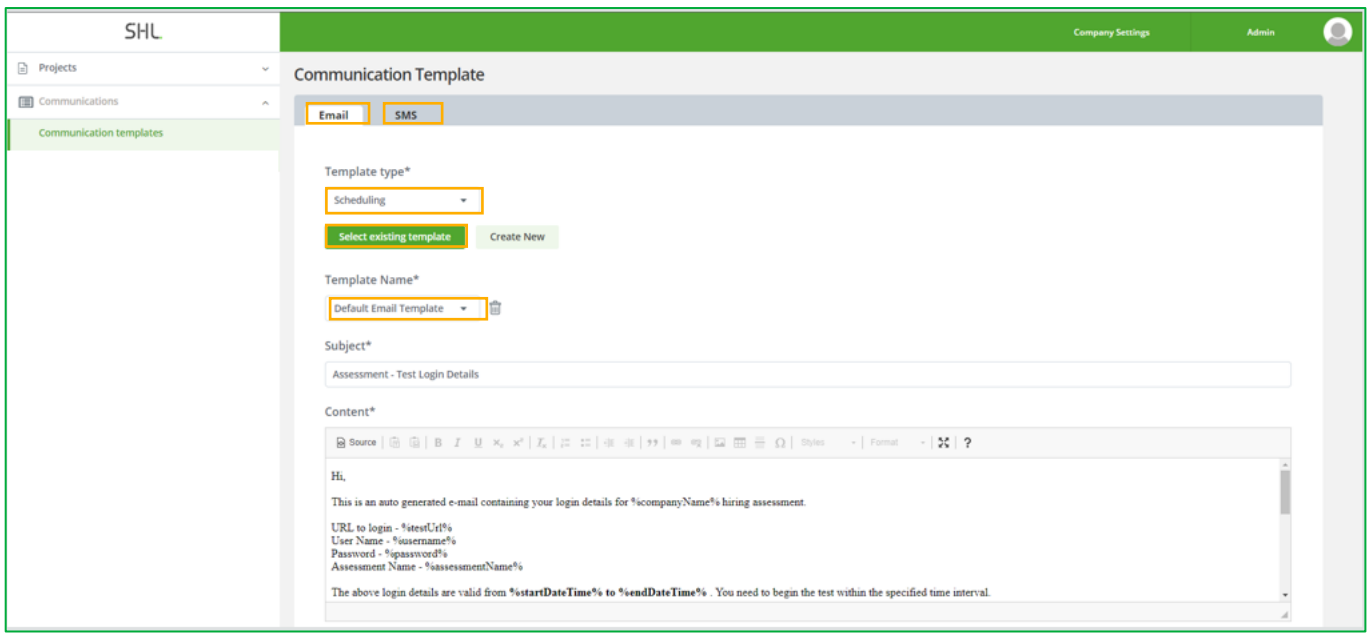
Editing Existing Templates

Begin by selecting either *Email or SMS*.

Choose which Template Type you wish to change from the drop down e.g., *Scheduling*

Click on *Select existing template* and choose the relevant template from the drop-down e.g., *Default email template*

Click *Save*



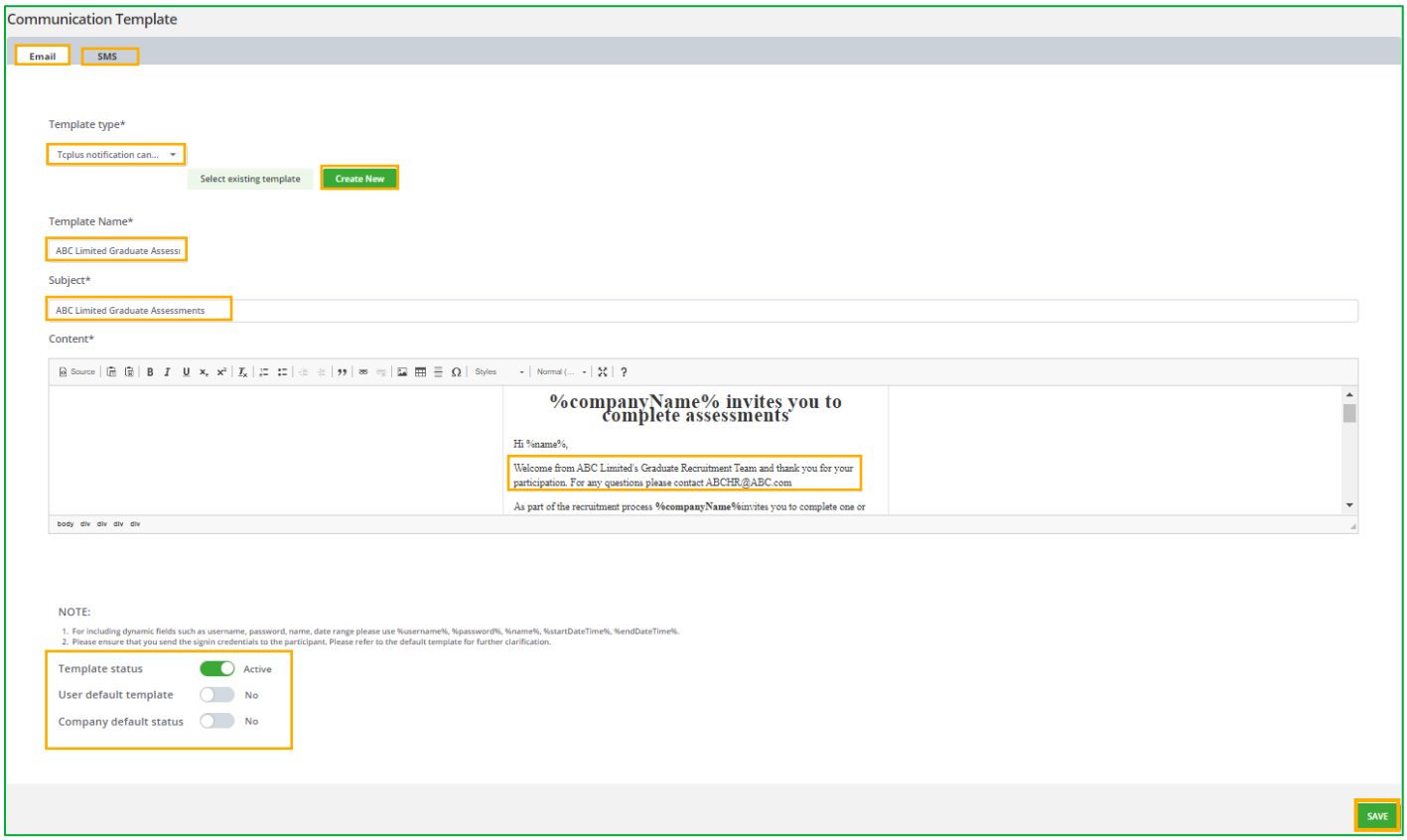
Note: both default and custom templates can be selected here.

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Creating New Templates

To create a new template, select either *Email or SMS* and then click *Create New*

- Select Template type – TC+ templates are prefixed e.g., *TCplus notification candidate*
- Add Template Name
- Add Subject
- Add custom text
- **Note**: Dynamic fields **must** remain to ensure that all participants receive relevant credentials.



Custom templates can be deactivated by turning off *Template Status*.

To set custom template as a default for the user turn on *User default template*

To set custom template as default for all users turn on *Company default status*

To save new template click *Save*

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