



FAQ's for Firm Administrators – Business Developers – Coaches acting as a COACH

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1. How do I login to the CCM?

Short Answer:

Login to the OI Solutions website

Go to the top right of the page

Click on CCM Login

Long Visual Answer:

Login to OI Solutions

Your username is your email address

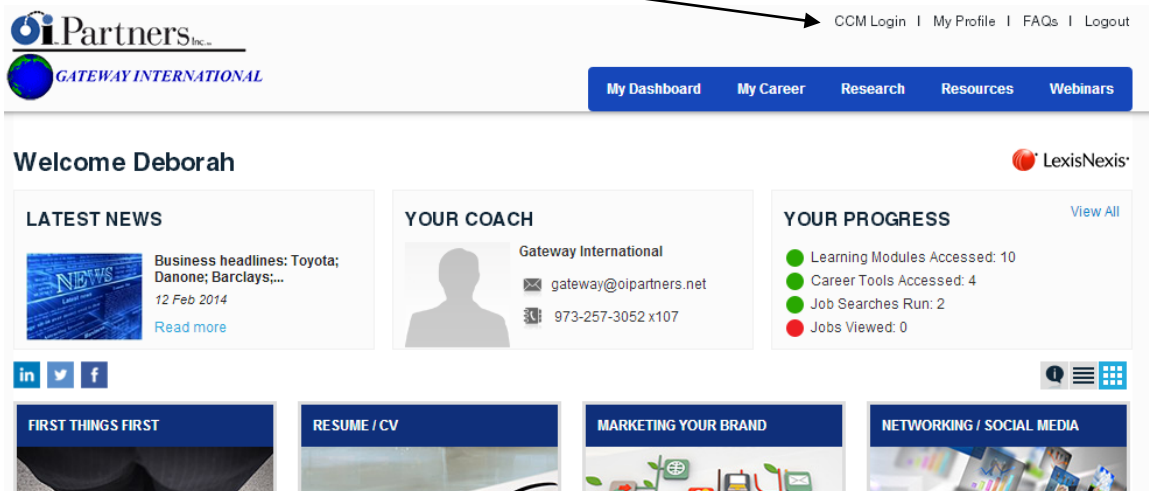
Get your password from your Firm Administrator

Login link is: <https://oisolutions.oipartners.net/CustomerLogin>



Go to the top right of the page

Click on CCM Login



You're in!

2. How to I find my candidates?

Short Answer:

Login to the OI Solutions website

Go to the top right of the page

Click on CCM Login

Method 1

Click on Contacts – Look at your list

Add columns to your list to help you search by picking “Select columns to display on the submenu”

Find your candidate

Method 2

Start typing last name of candidate in search box at top right

System will display list of names that match

Pick your candidate off list

Long Visual Answer:

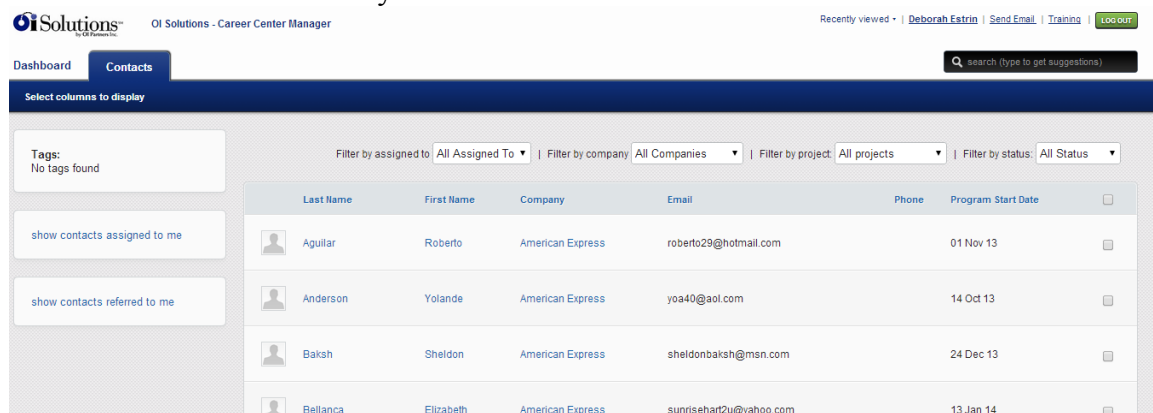
Login to the OI Solutions website

Go to the top right of the page

Click on CCM Login

Method 1

Click on Contacts – Look at your list



The screenshot shows the OI Solutions Career Center Manager interface. At the top, there is a navigation bar with the OI Solutions logo and the text "OI Solutions - Career Center Manager". On the right side of the navigation bar, there are links for "Recently viewed", "Deborah Estrin", "Send Email", "Training", and "Logout". Below the navigation bar, there is a "Dashboard" tab and a "Contacts" tab. A search box is located on the right side of the dashboard with the text "search (type to get suggestions)". Below the search box, there is a "Select columns to display" dropdown menu. On the left side of the dashboard, there is a "Tags" section with the text "No tags found" and two buttons: "show contacts assigned to me" and "show contacts referred to me". The main content area displays a list of contacts with the following columns: Last Name, First Name, Company, Email, Phone, and Program Start Date. The list contains four entries:

Last Name	First Name	Company	Email	Phone	Program Start Date
Aguilar	Roberto	American Express	roberto29@hotmail.com		01 Nov 13
Anderson	Yolande	American Express	yoa40@aol.com		14 Oct 13
Baksh	Sheldon	American Express	sheldonbaksh@msn.com		24 Dec 13
Bellanca	Elizabeth	American Express	sunrisehart2u@yahoo.com		13 Jan 14

Add columns to your list to help you search by picking “Select columns to display on the submenu.” Picked selections will stay until you change them again.

The screenshot shows the OI Solutions Career Center Manager interface. At the top, there is a navigation bar with 'Dashboard' and 'Contacts' tabs. Below the 'Contacts' tab, a dark blue bar contains the text 'Select columns to display'. A white dialog box is open over this bar, listing various columns with checkboxes. The 'Contacts' tab is highlighted, and a filter dropdown is set to 'All Assigned To'. Below the dialog, a table displays a list of contacts with columns for 'Last Name' and 'First Name'.

Last Name	First Name
Aguilar	Roberto
Anderson	Yolande
Baksh	Sheldon
Bellanca	Elizabeth
Bonkowski	Ivana
Cutrone	Lori
Escoriza	Carmen

I have added ... Status and Last Note to this one:

The screenshot shows the OI Solutions Career Center Manager interface. At the top, there is a navigation bar with "Dashboard" and "Contacts" tabs. Below the tabs, there is a search bar and a "Select columns to display" section. The main content area displays a table of contacts with the following columns: Last Name, First Name, Company, Email, Phone, Last updated, Status, and Program Start Date. The table contains five rows of contact information.

Last Name	First Name	Company	Email	Phone	Last updated	Status	Program Start Date
Aguilar	Roberto	American Express	roberto29@hotmail.com		12 Nov 13	Alumni	01 Nov 13
Anderson	Yolande	American Express	yoa40@aol.com		15 Oct 13	Engaged	14 Oct 13
Baksh	Sheldon	American Express	sheldonbaksh@msn.com		24 Jan 14	Engaged	24 Dec 13
Bellanca	Elizabeth	American Express	sunrisehart2u@yahoo.com		22 Jan 14	Engaged	13 Jan 14
Bonkowski	Ivana	American Express	ibonko@bellsouth.net			Engaged	

You can sort the columns by clicking on any column header and/or using the filters at the top
Find your candidate

Method 2

Start typing last name of candidate in search box at top right

The screenshot shows the OI Solutions Career Center Manager interface with a search box at the top right. The search box contains the text "Yolande Anderson". An arrow points from the text "Start typing last name of candidate in search box at top right" to the search box. The main content area displays a table of contacts with the following columns: Last Name, First Name, Company, Email, Phone, Last updated, Status, and Program Start Date. The table contains five rows of contact information.

Last Name	First Name	Company	Email	Phone	Last updated	Status	Program Start Date
Aguilar	Roberto	American Express	roberto29@hotmail.com		12 Nov 13	Alumni	01 Nov 13
Anderson	Yolande	American Express	yoa40@aol.com		15 Oct 13	Engaged	14 Oct 13
Baksh	Sheldon	American Express	sheldonbaksh@msn.com		24 Jan 14	Engaged	24 Dec 13
Bellanca	Elizabeth	American Express	sunrisehart2u@yahoo.com		22 Jan 14	Engaged	13 Jan 14

System will display list of names that match
Pick your candidate off list

3. How do I find candidates who were referred by an OIGPartner?

Short Answer:

Login to the OI Solutions website

Go to the top right of the page

Click on CCM Login

Method 1

Click on Contacts

Add columns to your list to help you search by picking “Select columns to display on the submenu”

Find your candidate

Method 2

Start typing last name of candidate in search box at top right

System will display list of names that match

Pick your candidate off list

Long Visual Answer:

Method 1

Login to the OI Solutions website

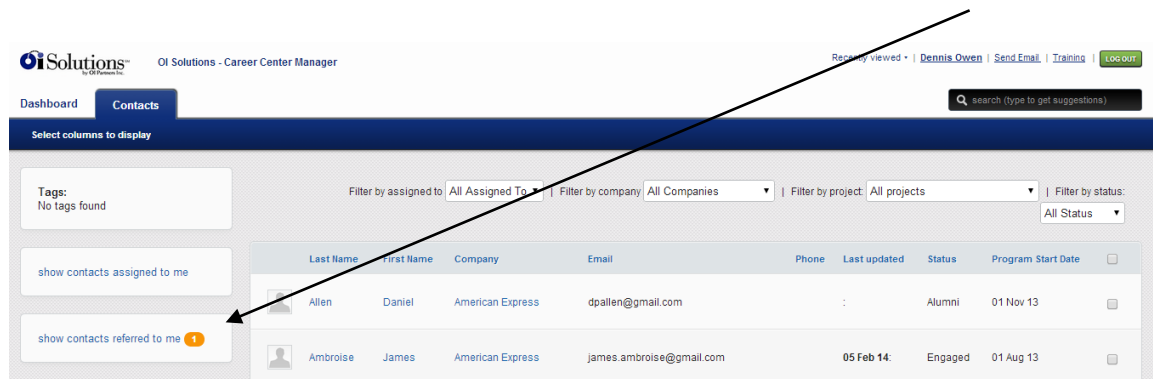
Go to the top right of the page

Click on CCM Login

Click on Contacts

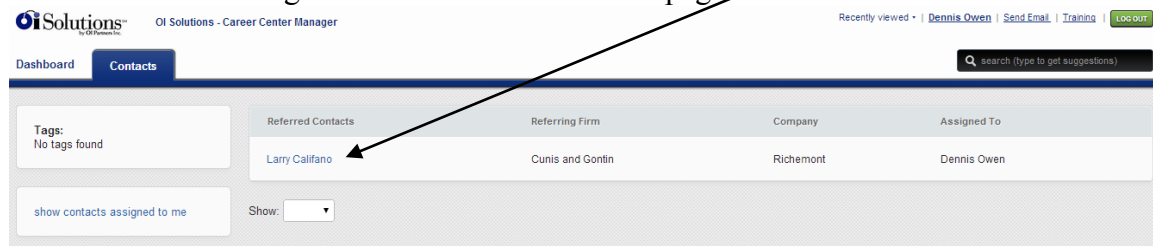
Look on left-hand side at number in the oval: “Show contacts referred to me”

Click on it



It will show you your referred candidates

Click on the name to get to the candidate’s contact page



Method 2

Start typing last name of candidate in search box at top right

The screenshot shows the OI Solutions Career Center Manager interface. At the top right, there is a search box with the text 'Yolande Anderson' entered. An arrow points from the text 'Start typing last name of candidate in search box at top right' to this search box. The interface includes a navigation bar with 'Dashboard' and 'Contacts' tabs. Below the navigation bar, there are filter options for 'Filter by assigned to', 'Filter by company', 'Filter by project', and 'Filter by status'. A table of contacts is displayed, with columns for Last Name, First Name, Company, Email, Phone, Last updated, Status, and Program Start Date. The table contains four rows of candidate information.

Last Name	First Name	Company	Email	Phone	Last updated	Status	Program Start Date
Agullar	Roberto	American Express	roberto29@hotmail.com		12 Nov 13:	Alumni	01 Nov 13
Anderson	Yolande	American Express	yoa40@aol.com		15 Oct 13:	Engaged	14 Oct 13
Baksh	Sheldon	American Express	sheldonbaksh@msn.com		24 Jan 14:	Engaged	24 Dec 13
Bellanca	Elizabeth	American Express	sunrisehart2u@yahoo.com		22 Jan 14:	Engaged	13 Jan 14

System will display list of names that match
Pick your candidate off list

4. How do I add a note?

Short Answer:

Login to the OI Solutions website
Go to the top right of the page
Click on CCM Login

Method 1

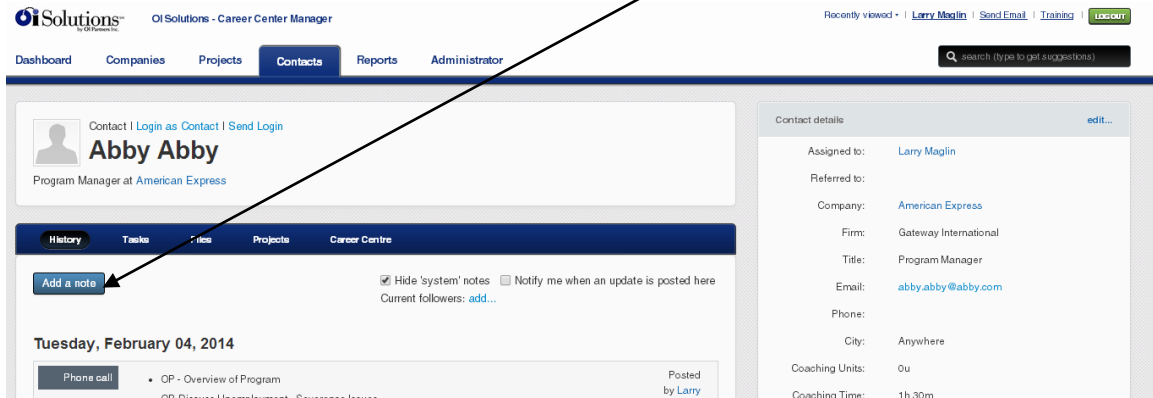
Click on Contacts
Add columns to your list to help you search by picking “Select columns to display on the submenu”
Find and click on your candidate
Click on “Add note” on left side under name of contact
Click on “Select preset notes”
Check off all relevant items associated with this meeting... Save changes at bottom
Pick Type of meeting
Upload any documents (if you want to)
Pick date of meeting
Input Time or Units (if you want to)
Check “Send a copy of this note to ‘contact’” if you wish
Click “Add this note”

Method 2

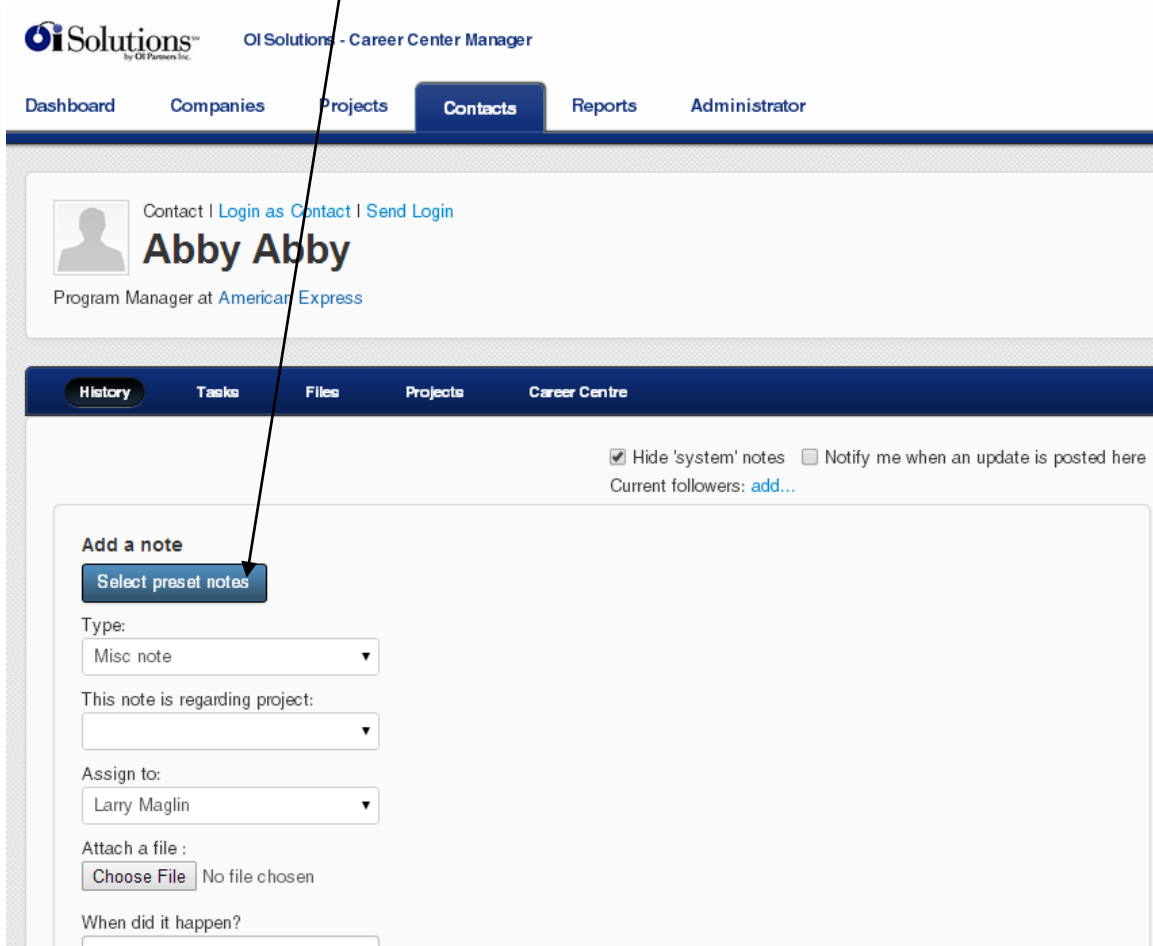
Start typing last name of candidate in search box at top right
System will display list of names that match
Pick your candidate off list
Click on “Add note” on left side under name of contact
Click on “Select preset notes”
Check off all relevant items associated with this meeting ... Save changes at bottom
Pick Type of meeting
Upload any documents (if you want to)
Pick date of meeting
Input Time or Units (if you want to)
Check “Send a copy of this note to ‘contact’” if you wish
Click “Add this note”

Long Visual Answer: Assumes you can get to the contact page from above

Click on “Add note” on left side under name of contact



Click on “Select preset notes”



Check off all relevant items associated with this meeting

Select preset notes to describe your interaction

Outplacement (OP) Overview	
<input type="checkbox"/> OP - Overview of Program	<input type="checkbox"/> OP - Co-Managed Program & options
<input type="checkbox"/> OP - Discussion of Background and Skills	<input type="checkbox"/> OP - Review of client's plan for Achievement
<input type="checkbox"/> OP-Discuss Unemployment - Severance Issues	<input type="checkbox"/> OP-Discuss Training Options - via Unemployment or other sources
<input type="checkbox"/> OP-Discuss Severance	<input type="checkbox"/> OP-Discuss Finances
<input type="checkbox"/> OP-Discuss Family and Relocation Options	

Outplacement (OP) Assessments	
<input type="checkbox"/> OP- Which Assessments to take (OI Solutions®)	<input type="checkbox"/> OP-Review and Discussion of Assessments taken

Outplacement (OP) Career Planning	
<input type="checkbox"/> OP-Discuss Career Options (including Entrepreneurial or Retirement)	<input type="checkbox"/> OP-ID of Markets, Industries, Geography and other options
<input type="checkbox"/> OP-Develop Clients Objective(s)	<input type="checkbox"/> OP-Review Industry Options
<input type="checkbox"/> OP-Command Central and System Set up for Search	

Outplacement (OP) Resume Creation	
<input type="checkbox"/>	<input type="checkbox"/>

Use scroll bar to see more entries

When you're finished selecting items, click on "Save changes" at bottom

Other (Oth) Other	
<input type="checkbox"/> Oth-Client got rehired by old company - was serviced - Program Done	<input type="checkbox"/> Oth-Client rehired by old company - never engaged
<input type="checkbox"/> Oth- Client refused service - never engaged - unknown reason	<input type="checkbox"/> Oth- Client got job - never engaged
<input type="checkbox"/> Oth- Client got job - does not need more service - Program Done	<input type="checkbox"/> Oth- Client set up meeting - never showed - never engaged
<input type="checkbox"/> Oth- Client started Program - unresponsive - Program Done	

You are then brought back to the "Add a note" screen

Add a note

Type:

This note is regarding project:

Assign to:

Attach a file : No file chosen

When did it happen?

Time spent minutes Units spent units

Or attach from Google Docs...

Send a copy of this note to **Abby** at *abby.abby@abby.com*

Also set a task

Pick Type of meeting

Upload any documents (if you want to)

Pick date of meeting

Input Time or Units (if you want to)

Check "Send a copy of this note to 'contact'" if you wish

Click "Add this note"... Your note will now be added

5. How do I change a note?

You can't change a note.

You will have to request your firm administrator edit it or delete it so you can re-do it.

6. How do I change the candidate's email or address?

Short Answer:

Login to the OI Solutions website

Go to the top right of the page

Click on CCM Login

Method 1

Click on Contacts

Add columns to your list to help you search by picking “Select columns to display on the submenu”

Find and click on your candidate

Click Edit on top right-hand side of contact info

Method 2

Start typing last name of candidate in search box at top right

System will display list of names that match

Pick your candidate off list

Click Edit on top right-hand side of contact info

Long Visual Answer: Assumes you can get to the contact page from above

Click Edit on top right-hand side of contact info

The screenshot shows the OI Solutions Career Center Manager interface. The top navigation bar includes 'Dashboard', 'Companies', 'Projects', 'Contacts', 'Reports', and 'Administrator'. A search box is located at the top right. The main content area displays the contact details for 'Abby Abby', a Program Manager at American Express. The details include assigned to (Larry Maglin), referred to, company (American Express), firm (Gateway International), title (Program Manager), email (abby.abby@abby.com), phone, city (Anywhere), coaching units (0u), coaching time (1h 30m), program start date (01 Nov 13), program end date (28 Feb 14), and career centre start date (01 Nov 13). An 'edit...' link is visible at the top right of the contact details section, with an arrow pointing to it from the text above.

This will open the Contact's information ...

OI Solutions
Career Center Manager

Recently viewed • [Larry Madlin](#) | [Send Email](#) | [Training](#) | [Logout](#)

Dashboard Companies Projects **Contacts** Reports Administrator

search (type to get suggestions)

Contact

* First Name: * Last Name:

Middle Name/Initial: Title:

Email: Alternate Email:

Phone: Mobile Phone:

Fax: Alternate Phone:

Address 1: Address 2:

City: Country:

Postal Code: State/Region:

Time Zone: Tags:

Company ID/Staff No.: Previous Job Title:

Company: Projects:

You will be able to update their email address if it changed or it was incorrect ... or change City, State if the candidate moved or it is incorrect

You can also reset the password for the candidate

Career Centre Theme: Career Centre End Date:

Reset Password: Auto Email Career Centre Login Details:

Current Password: abby123

Feedback:

After changes are made, click Save at bottom
If you have changed the email address (login) or reset the password, you can have the system send the candidate the new login information

Career Centre Theme: OIP Exempt Career Centre End Date: 2014-12-31

Reset Password: Auto Email Career Centre Login Details

Current Password: abby123

Feedback:

Comments:

Business Contact: A business representative at the Company

Custom fields: LDW: 2013-11-30

Custom fields: Candidate Assigned: 2013-11-01

Custom fields: Last Date to Engage: 2014-01-11

Custom fields: Cost Center: 012365489

Custom fields: Overall Satisfaction 1-5:

Custom fields: Coach Satisfaction 1-5:

Custom fields: Materials Satisfaction 1-5:

Custom fields: OI Solutions Satisfaction 1-5:

7. How do I see a candidate's assessment?

Short Answer:

Login to the OI Solutions website

Go to the top right of the page

Click on CCM Login

Method 1

Click on Contacts

Add columns to your list to help you search by picking "Select columns to display on the submenu"

Find and click on your candidate

Underneath the Name, go to the blue submenu "History – Tasks – Files – Projects – Career Center"

Click on "Career Center"

Click on Career Assessments ... If there are assessments done, you will be able to view and/or print

Method 2

Start typing last name of candidate in search box at top right

System will display list of names that match

Pick your candidate off list

Underneath the Name, go to the blue submenu "History – Tasks – Files – Projects – Career Center"

Click on "Career Center"

Click on Career Assessments ... If there are assessments done, you will be able to view and/or print

Long Visual Answer: Assumes you can get to the contact page from above

Click on “Career Center”

Click on Career Assessments... If there are assessments done, you will be able to view and/or print

The screenshot displays the OI Solutions Career Center Manager interface. At the top, the logo for OI Solutions is visible, along with the title "OI Solutions - Career Center Manager". A navigation bar includes links for Dashboard, Companies, Projects, Contacts, Reports, and Administrator. Below this, a user profile section identifies the user as Tina Camporeale, located at Arcadia, US, with options to login or send a login request. A secondary navigation bar contains links for History, Tasks, Files, Projects, and Career Centre. The Career Centre section is active, showing a sub-menu with Career Assessments and Activity Report. Under Career Assessments, a box titled "Assessments Completed: (2)" contains a table with two entries: "Temperament" taken on 13 Jan 2014 and "Motivation at Work" taken on 10 Nov 2013. Each entry has a "View Report" button. At the bottom of the table, there are navigation buttons for First, Previous, 1, Next, and Last.

Assessment	Date Taken	Report
Temperament	13 Jan 2014	View Report
Motivation at Work	10 Nov 2013	View Report

First Previous 1 Next Last

8. How do I see a candidate's status?

Short Answer:

Login to the OI Solutions website

Go to the top right of the page

Click on CCM Login

Method 1

Click on Contacts

Add columns to your list to help you search by picking “Select columns to display on the submenu”

Find and click on your candidate

Underneath the Name, go to the blue submenu “History – Tasks – Files – Projects – Career Center”

Click on “Career Center”

Click on Activity Report

Input Date Range to look for activity

Method 2

Start typing last name of candidate in search box at top right

System will display list of names that match

Pick your candidate off list

Underneath the Name, go to the blue submenu “History – Tasks – Files – Projects – Career Center”

Click on “Career Center”

Click on Activity Report

Input Date Range to look for activity

Long Visual Answer: Assumes you can get to the contact page from above

Click on "Career Center"

The screenshot shows the 'Career Centre' interface. At the top, there are navigation tabs: History, Tasks, Files, Projects, and Career Centre. Below the tabs, there are two sub-tabs: Career Assessments and Activity Report. A date range filter is set to '2013-11-17' to '2014-02-17' with a 'GO' button. A user profile is displayed with the following details:

- Name: Tina Camporeale
- Id: tinacamp@optimum.net
- Email: tinacamp@optimum.net
- Last Login: 09 Feb 2014
- Account Start: 08 Nov 2013
- Account End: 28 Feb 2014

Below the profile, it says 'Results from 17 Nov 2013 to 17 Feb 2014'. There are two columns of activity:

Modules Activity	Tools Activity
Accomplishments Exempt	eGold Recruitment
Cover Letters exempt	Interview Simulator
E-Learning Hub	Knowledge Hub
Interview Preparation	Lexis Nexis
Lexis Nexis Landing	
Marketing script exempt	
Questions for HR	
Recruiters Search Firms	
The First 90 Days Exempt	
Tough Interview Questions Exempt	
Understanding Yourself	

Annotations with arrows point to the 'Activity Report' tab, the 'GO' button, the date input fields, and a printer icon.

Click on Activity Report

Input Date Range and click Go ... to look for activity

Print if needed

9. I have a Non-Exempt or specialty-theme candidate. How do I see that site?

Short Answer:

Login to the OI Solutions website

Go to the top right of the page

Click on CCM Login

Method 1

Click on Contacts

Add columns to your list to help you search by picking “Select columns to display on the submenu”

Find and click on your candidate

Over the Name, you will see “Contact | [Login as Contact](#) | [Send Login](#)” - Pick “Login as Contact”

Method 2

Start typing last name of candidate in search box at top right

System will display list of names that match

Pick your candidate off list

Over the Name, you will see “Contact | [Login as Contact](#) | [Send Login](#)” - Pick “Login as Contact”

Long Visual Answer: Assumes you can get to the contact page from above

Over the Name, you will see “Contact | [Login as Contact](#) | [Send Login](#)” - Pick “Login as Contact”

The screenshot displays the OI Solutions Career Center Manager interface. At the top, the logo "OI Solutions by OI Partners Inc." is visible, along with the text "OI Solutions - Career Center Manager". Below this is a navigation bar with tabs for "Dashboard", "Companies", "Projects", "Contacts", "Reports", and "Administrator". The "Contacts" tab is selected. Below the navigation bar, there is a profile card for a contact named "Abby Abby", who is a "Program Manager at American Express". The profile card includes a placeholder for a profile picture and the text "Contact | [Login as Contact](#) | [Send Login](#)". Below the profile card, there is a sub-navigation bar with tabs for "History", "Tasks", "Files", "Projects", and "Career Centre". The "History" tab is selected. Below the sub-navigation bar, there is a section for "Add a note" with a checkbox for "Hide 'system' notes" and a checkbox for "Notify me when an update is posted here". Below this, there is a date separator "Tuesday, February 04, 2014". Below the date separator, there is a list of notes, including one titled "Phone call" with bullet points: "OP - Overview of Program", "OP-Discuss Unemployment - Severance Issues", and "OP-Discuss Finances". The note is attributed to "Larry Maglin" and is dated "12 days".

You will be logged in as the candidate and see their home screen and menu items.

The screenshot shows the user dashboard for 'abby1' on the OI Partners Gateway International website. The top navigation bar includes 'My Profile', 'FAQs', and 'Logout'. A secondary menu contains 'My Dashboard', 'My Career', 'Research', 'Resources', and 'Webinars'. The dashboard is divided into several sections:

- Welcome abby1**: Includes the LexisNexis logo.
- LATEST NEWS**: Features a tweet from 'Demonstrate your soft skills using Twitter' dated 12 Feb 2014, with a 'Read more' link.
- YOUR COACH**: Lists Larry Maglin with contact information: larry.maglin@giginmail.com and 800-376-8176 x107.
- YOUR PROGRESS**: Shows a 'View All' link and four progress indicators, all at 0: Learning Modules Accessed, Career Tools Accessed, Job Searches Run, and Jobs Viewed.
- WHAT TO DO FIRST**: A tile with a person under an umbrella and question marks.
- FIND JOBS**: A tile with a hand holding a magnifying glass.
- BUILD A RESUME**: A tile with a resume document and glasses.
- APPLYING FOR JOBS**: A tile with a red pushpin on a document with the words 'employment search job work'.
- INTERVIEWING**: A tile with a word cloud centered around 'JOB INTERVIEW'.
- COVER LETTERS**: A tile showing hands writing on a document.
- NETWORKING**: A tile with silhouettes of people in a networked space.
- ASSESSMENTS**: A tile with four colored arrows pointing up, labeled 'Ability', 'Skill', 'Performance', and 'Potential'.

10. How do I send an email to a candidate from the system?

Short Answer:

Login to the OI Solutions website
Go to the top right of the page
Click on CCM Login

Method 1

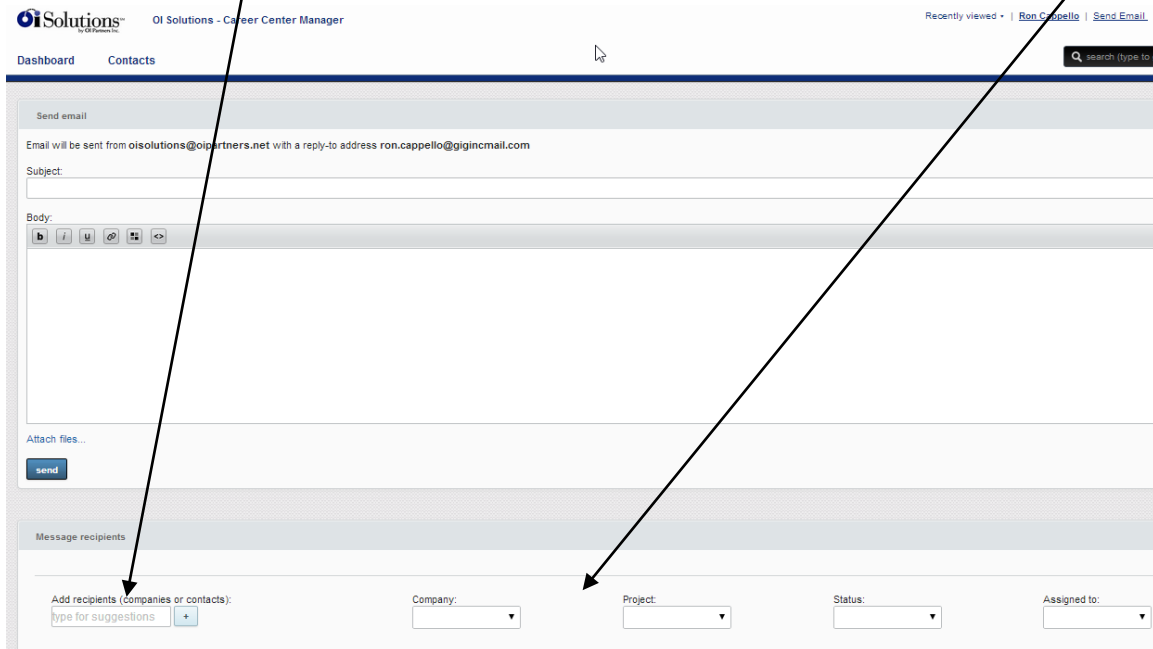
Go to top right of page
Click Send Email

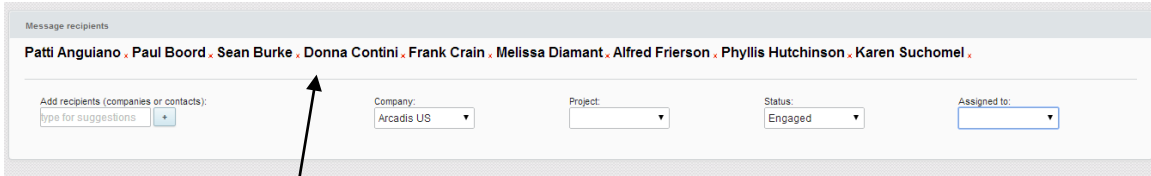
Long Visual Answer:

Go to top right of page
Click Send Email



You can send a single email or generate a list of candidates and send an email to all of them using filters at bottom





I have picked a company and status and the system auto-populates the recipients of the email.

Just add your message and any attachments (if needed) and send.