



### FAQ's for Firm Administrators

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# 1. How do I login to the Career Center Manager (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 the OI Solutions website

Use the email address you provided to the Firm Administrator and the password that was provided to you

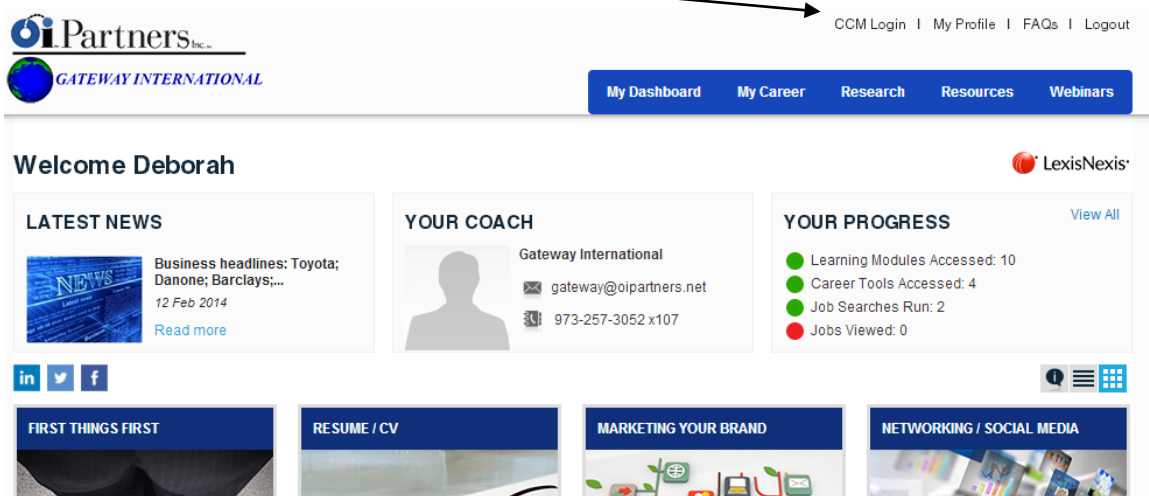
Login Link is: <https://oisolutions.oiglobalpartners.com/CustomerLogin>



The screenshot shows the OI SOLUTIONS login page. At the top left is the OI SOLUTIONS logo, which consists of a stylized globe icon and the text "OI SOLUTIONS™ by OI GLOBAL PARTNERS". Below the logo are two input fields: "Email:" and "Password:". The "Email:" field is a white box with a blue border. The "Password:" field is a white box with a grey border. Below the password field is a grey "Login" button.

Go to the top right of the page

Click on CCM Login



The screenshot shows the OI Partners website dashboard. At the top left is the OI Partners logo, which consists of a stylized globe icon and the text "OI Partners, Inc." and "GATEWAY INTERNATIONAL". To the right of the logo is a navigation menu with links: "CCM Login", "My Profile", "FAQs", and "Logout". Below the logo is a blue navigation bar with links: "My Dashboard", "My Career", "Research", "Resources", and "Webinars". The main content area is titled "Welcome Deborah" and features three main sections: "LATEST NEWS" with a "Read more" link, "YOUR COACH" with contact information for Gateway International, and "YOUR PROGRESS" with a "View All" link. At the bottom of the dashboard are four featured sections: "FIRST THINGS FIRST", "RESUME / CV", "MARKETING YOUR BRAND", and "NETWORKING / SOCIAL MEDIA".

You're in!

## 2. How to I find my candidates? (Firm Admins can see all candidates; Business Developers and Coaches can see only some 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 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 contact 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 displays the OI Solutions Career Center Manager interface. At the top, there is a navigation bar with "Dashboard" and "Contacts" tabs. A search box is located in the top right corner. Below the navigation bar, there is a "Select columns to display" section. The main content area shows a list of contacts with columns for Last Name, First Name, Company, Email, Phone, and Program Start Date. The contacts listed are:

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 submenu titled 'Select columns to display' is open, listing various fields with checkboxes. The 'Contacts' tab is highlighted with a blue arrow pointing to the submenu. The main content area shows a table of contacts with columns for 'Last Name' and 'First Name'. A filter dropdown is set to 'All Assigned To'.

**Select columns to display**

- Email
- Phone
- Fax
- Address
- City
- Country
- Last note
- Assignee
- Referred to
- Projects
- Programme Hours
- Coaching Time
- Coaching Units
- Firm
- Status
- Program Start Date
- LDW
- Candidate Assigned
- Last Date to Engage
- Cost Center
- Overall Satisfaction 1-5
- Coach Satisfaction 1-5
- Materials Satisfaction 1-5
- OI Solutions Satisfaction 1-5

Filter by assigned to: All Assigned To

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

Save or Cancel

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

Dashboard | **Contacts** | Search: search (type to get suggestions)

Select columns to display

Tags: No tags found

show contacts assigned to me

show contacts referred to me

Filter by assigned to: All Assigned To | Filter by company: All Companies | Filter by project: All projects | Filter by status: All Status

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 use the filters at the top  
Find your client

### Method 2

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

Dashboard | **Contacts** | Search: ander  
Yolande Anderson

Select columns to display

Tags: No tags found

show contacts assigned to me

show contacts referred to me

Filter by assigned to: All Assigned To | Filter by company: All Companies | Filter by project: All projects | Filter by status: All Status

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 contact off list

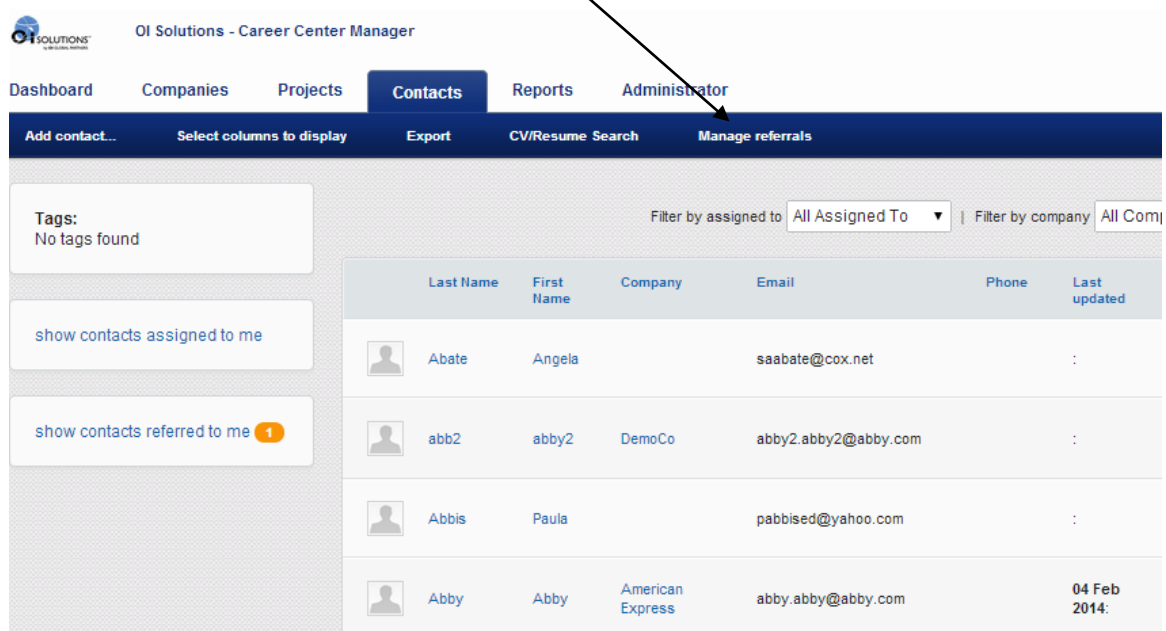
### 3. How do I find my candidates who are referred by an OI Global Partner?

*Short Answer:*

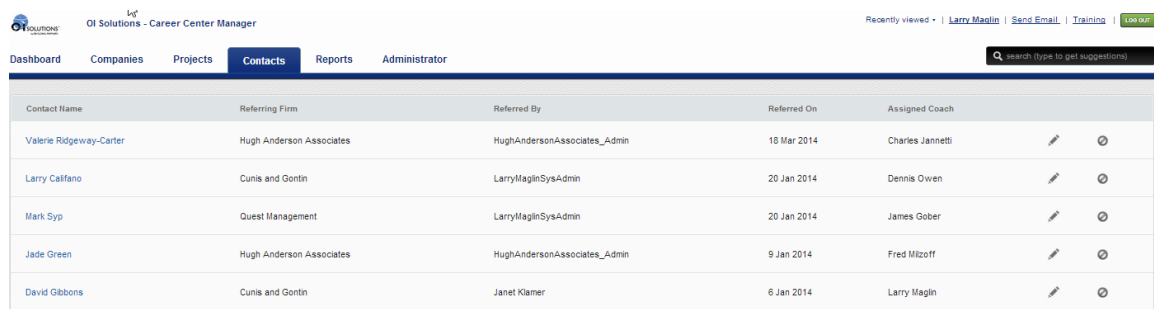
- Login to the OI Solutions website
- Go to the top right of the page
- Click on CCM Login
- Click on Contacts – submenu: “Manage referrals”

*Long Visual Answer:*

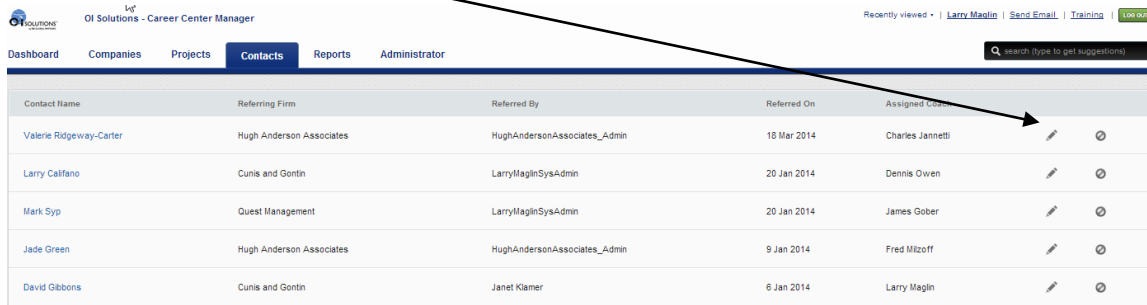
- Login to the OI Solutions website
- Go to the top right of the page
- Click on CCM Login
- Click on Contacts
- Click on Contacts – submenu: “Manage referrals”
- Click on it



It will show you candidates who have been referred to you



The newly referred case will have no entry in the “Assigned Coach” until you click on the pencil icon and pull down the list of coaches to assign to. After you have picked the coach... click on the ✓ to finish the entry.



The assigned coach will now have this contact (candidate) in their portal. They can find the new contact (candidate) two ways ....

### Method 1

Login to the OI Solutions website

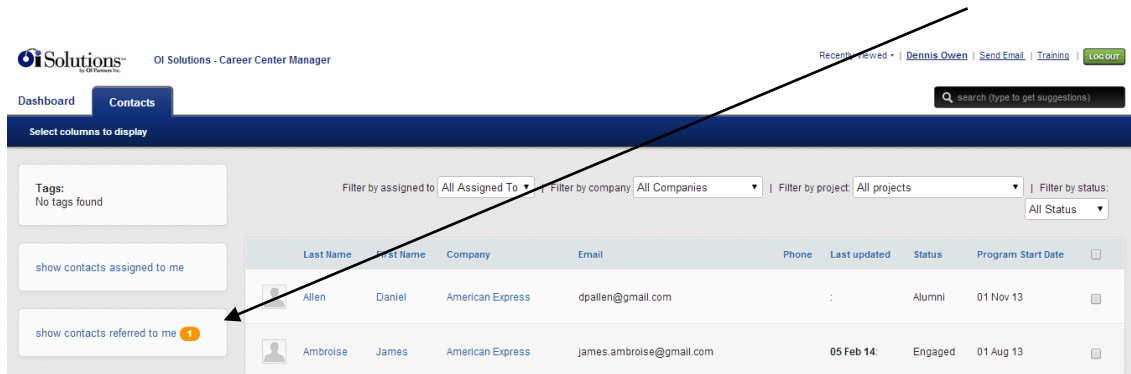
Go to the top right of the page

Click on CCM Login

Click on Contacts

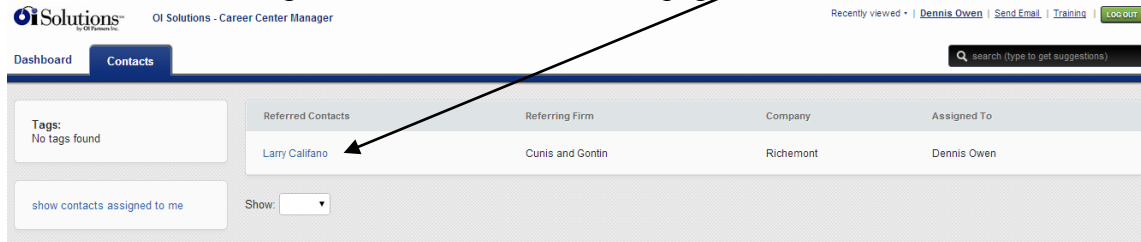
Look on left-hand side at number in the oval: “Show contacts referred to me”

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 'ander' and a dropdown menu showing '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 interface includes a navigation bar with 'Dashboard' and 'Contacts' tabs, and a search bar with the text 'Yolande Anderson'. Below the search bar, there are filters for 'Filter by assigned to', 'Filter by company', 'Filter by project', and 'Filter by status'. The main content area displays a table of candidates with columns for Last Name, First Name, Company, Email, Phone, Last updated, Status, and Program Start Date. The table lists four candidates: Agullar, Anderson, Baksh, and Bellanca.

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 contact  
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 selections 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”

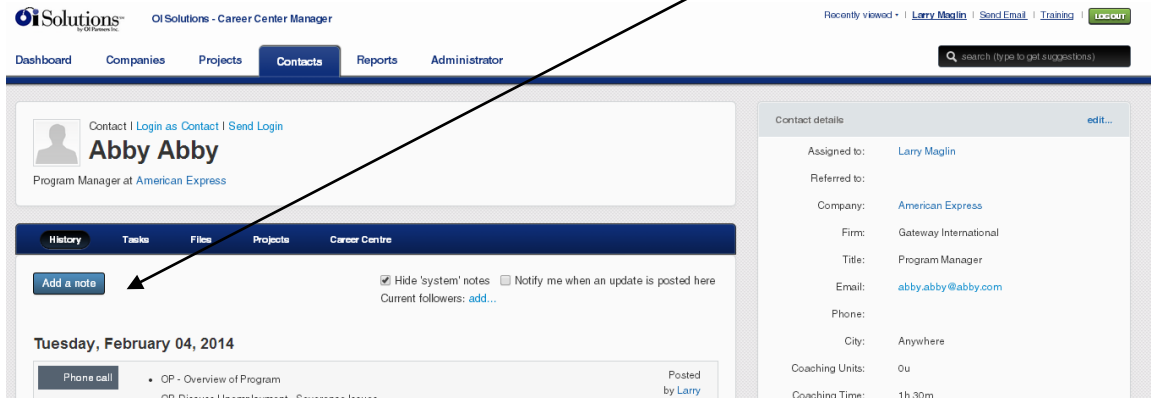
### Method 2

Start typing last name of candidate in search box at top right  
System will display list of names that match  
Pick your contact 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 selections 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”

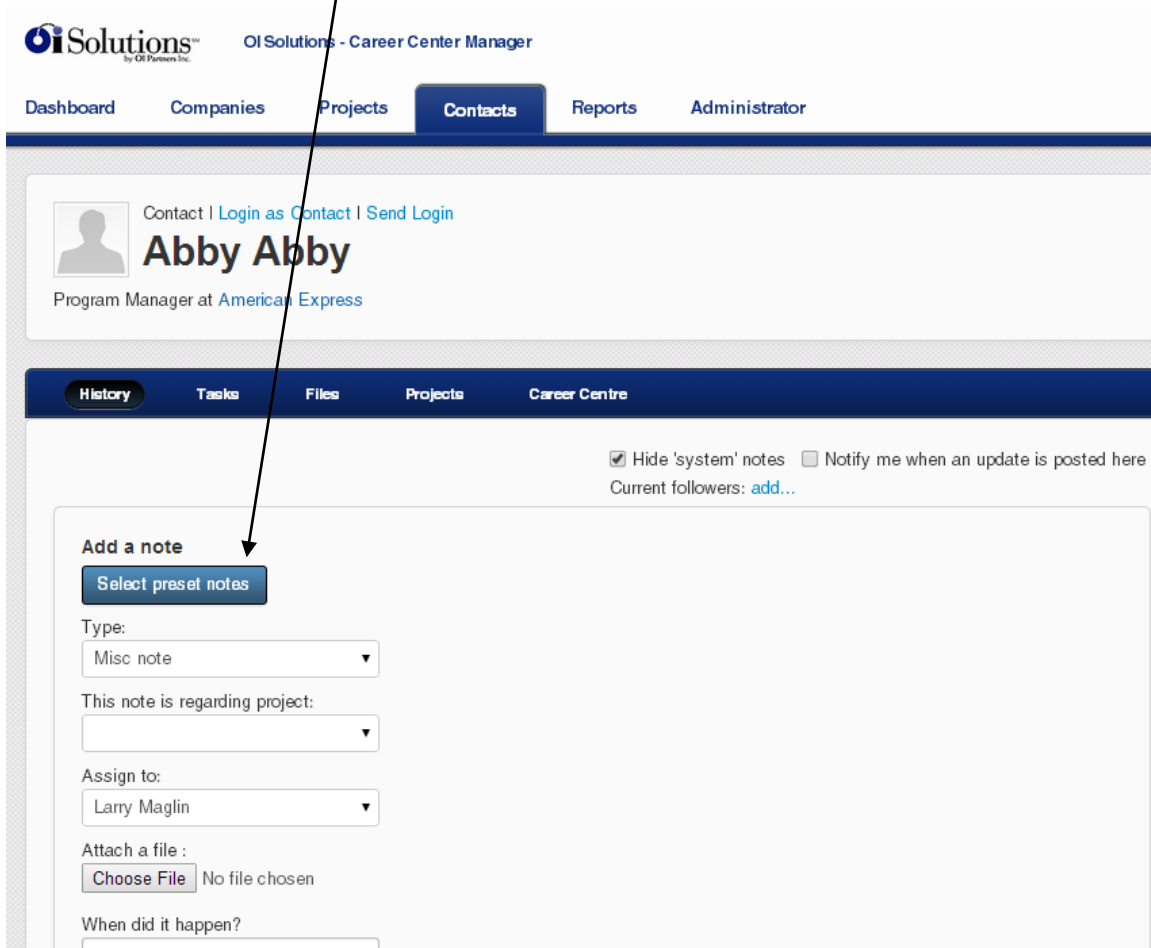
*Long Visual Answer: Assumes you can get to the contact page from above*

Long Visual Answer:

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 done picking selections, click on "Save selections" at bottom

<input type="checkbox"/> Sch- Referral Received and Assigned	
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](mailto: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 as a Firm Administrator?

### Short Answer:

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

### Method 1

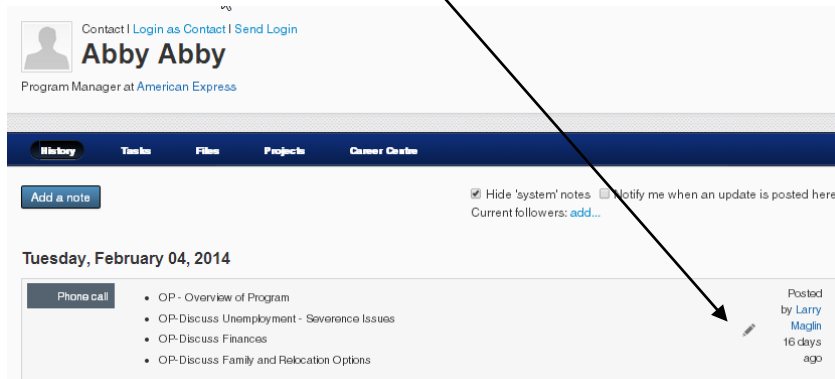
Click on Contacts –  
Add columns to your list to help you search by picking “Select columns to display” on the submenu  
Find and click on your contact  
Go to the note to edit, click on the pencil icon and it will allow you to add, change presets, change date, type or delete

### Method 2

Start typing last name of candidate in search box at top right  
System will display list of names that match  
Pick your contact off list  
Go to the note to edit, click on the pencil icon and it will allow you to add, change presets, change date, type or delete

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

Go to the note to edit. The pencil will allow you to add, change presets, change date, type or delete



You can now change presets or add

You can change type & date & time

You can save – delete – or cancel

## 6. How do I change the candidate's (contact) information?

*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 contact

On top right hand of Contact info on the right hand side... Click Edit

### Method 2

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

System will display list of names that match

Pick your contact off list


On top right hand of Contact info on the extreme right-hand side... Click edit

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

On top right-hand of Contact info on the extreme right-hand side... Click edit

The screenshot displays the OI Solutions Career Center Manager interface. At the top, there is a navigation bar with tabs for Dashboard, Companies, Projects, Contacts (selected), Reports, and Administrator. A search bar is located on the right side of the navigation bar. Below the navigation bar, the main content area is divided into two columns. The left column shows the contact's profile for Abby Abby, Program Manager at American Express, with options to login or send login. Below this is a section for adding notes, with a dropdown menu for 'Type' (currently set to 'Misc note') and a dropdown for 'Assign to' (currently set to 'Larry Maglin'). The right column shows the contact details for Abby Abby, including 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 center start date (01 Nov 13). An arrow points from the text above to the 'edit...' link in the top right corner of the contact details section.

This will open the Contact's information ...


 OI Solutions - Career Center Manager
 Recently viewed • [Larry Maglin](#) | [Send Email](#) | [Training](#) | [Logout](#)

[Dashboard](#)
[Companies](#)
[Projects](#)
[Contacts](#)
[Reports](#)
[Administrator](#)

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Contact

* First Name: <input type="text" value="Abby"/>	* Last Name: <input type="text" value="Abby"/>
Middle Name/Initial: <input type="text"/>	Title: <input type="text" value="Program Manager"/>
Email: <input type="text" value="abby.abby@abby.com"/>	
Alternate Email: <input type="text"/>	
Phone: <input type="text"/>	Mobile Phone: <input type="text"/>
Fax: <input type="text"/>	Alternate Phone: <input type="text"/>
Address 1: <input type="text"/>	Address 2: <input type="text"/>
City: <input type="text" value="Anywhere"/>	Country: <input type="text"/>
Postal Code: <input type="text"/>	State/Region: <input type="text" value="NJ"/>
Time Zone: <input type="text" value="(GMT-05:00) Eastern Time (US &amp; Canada)"/>	Tags: (comma-separated) <input type="text"/>
Company ID/Staff No.: <input type="text"/>	Previous Job Title: <input type="text" value="Program Manager"/>
Company: <input type="text" value="American Express"/>	Projects: <input type="text" value="Bank 35 - Blended"/>

You will be able to update any information for this Contact.

You can also reset the password for the Contact.

Career Centre Theme: <input type="text" value="OIP Exempt"/>	Career Centre End Date: <input type="text" value="2014-12-31"/>
Reset Password: <input type="text"/>	Auto Email Career Centre Login Details: <input type="checkbox"/>
Current Password: <input type="text" value="abby123"/>	
Feedback: <input type="text"/>	

After Changes are made... you can save at bottom  
 If you have changed the email address (login) or reset the password, you can have the system send the contact their new login information.

## 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 contact

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 contact 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, there is a navigation bar with tabs for Dashboard, Companies, Projects, Contacts, Reports, and Administrator. Below this, a user profile for Tina Camporeale is shown, with options to login or send a login request. A secondary navigation bar includes History, Tasks, Files, Projects, and Career Centre. The Career Centre section is active, showing a link to Career Assessments and an Activity Report. A table titled 'Assessments Completed: (2)' lists two assessments: Temperament (taken on 13 Jan 2014) and Motivation at Work (taken on 10 Nov 2013). Each assessment 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	<a href="#">View Report</a>
Motivation at Work	10 Nov 2013	<a href="#">View Report</a>

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 contact

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 contact 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 is a navigation bar with 'History', 'Tasks', 'Files', 'Projects', and 'Career Centre'. Below this, there are tabs for 'Career Assessments' and 'Activity Report'. A date range selector is present with 'Dates' from '2013-11-17' to '2014-02-17' and a 'GO' button. A user profile section lists: Name: Tina Camporeale, Id: tinacamp@optimum.net, Email: tinacamp@optimum.net, Last Login: 09 Feb 2014, Account Start: 08 Nov 2013, and Account End: 28 Feb 2014. Below this, it says 'Results from 17 Nov 2013 to 17 Feb 2014'. There are two columns of activity: 'Modules Activity' and 'Tools Activity'. A print icon is visible on the right side of the page.

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	

Click on Activity Report

Input Date Range and click Go ... to see activity

Print if needed

## 9. How do I make a referral?

*Short Answer:*

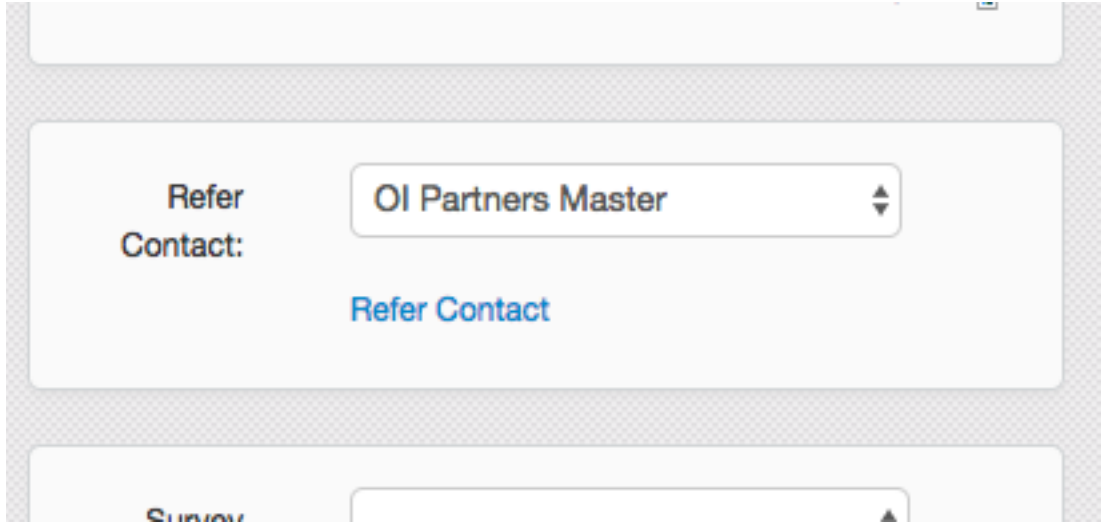
Login to the OI Solutions website

Go to the top right of the page

Click on CCM Login

Type candidate name into search box or Go to Contacts and find candidate you want to refer

On contact page, go to bottom of right-hand column and pull down menu to make referral:



Then click PRC hyperlink to report dollars in the Referral System.

It is important to TALK to the partner firm you are referring business to so they will expect the assignment and you can agree on terms.



## 10. How do I send emails to a contact 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 on page

Click Send email

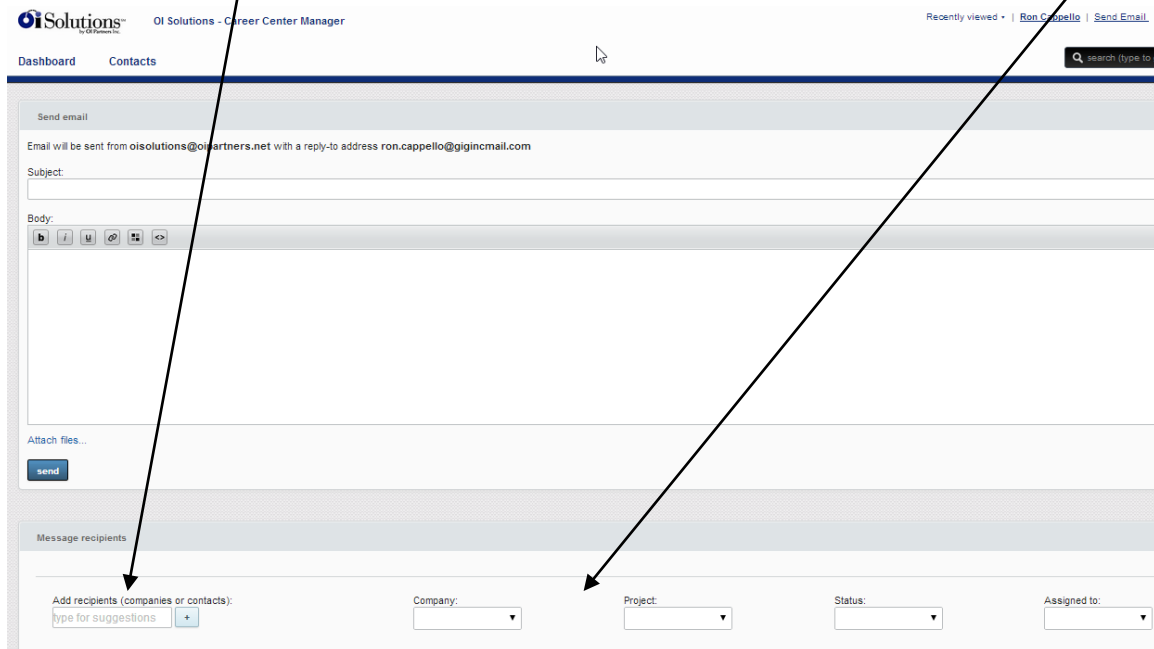
### Long Visual Answer

Go to top right on page

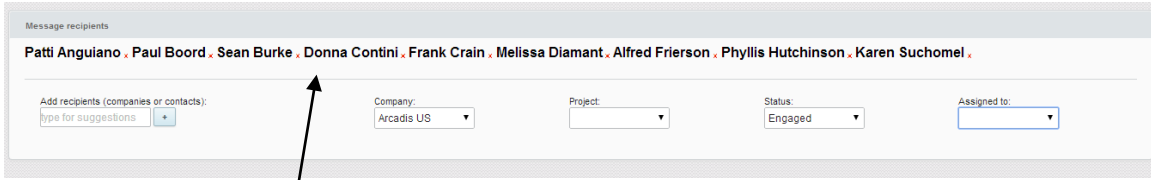
Click Send email



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



You can use filters by coach, company, status or project (program) to generate a list from the system.



I have picked a company and status and the system auto populates the recipients the email can be sent to.

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

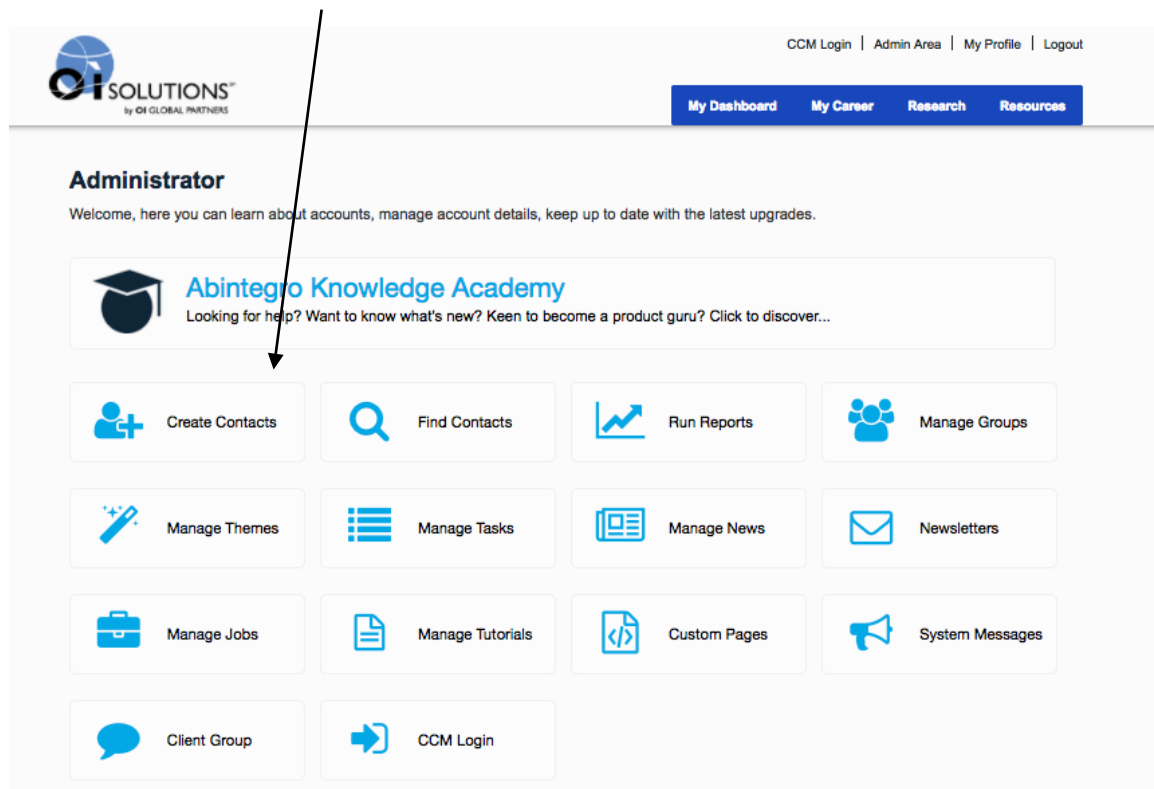
## 11. How do I create a single new contact?

### *Short Answer:*

Login to the OI Solutions website  
Go to the top right of the page  
Click on Admin Area  
Click on Create Contacts  
Put in firm token and Load  
Fill out form and create contact

### *Long Visual Answer*

Click on Admin Area  
Click on Create Contacts



Put in firm token and Load  
Fill out form and create contact

## Create Single Account

Create an account in the Career Centre and Career Centre Manager (where available)

Create Multiple Accounts

Enter client token:     Remember Token

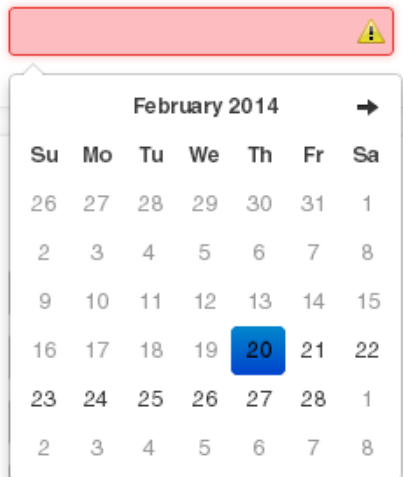
### Account Information

First Name:    
 Last Name:    
 Email Address:    
 User ID/Reference:   
 Password:   
 Career Centre End Date:

### Contact Details

Title:  Address 1:   
 Middle Name/Initial:  Address 2:   
 Phone:  City:

Items in Account Information: Pink boxes have to be filled out...Career Center End Date (CCED) you should pick off of calendar which pops up after you click on CCED box



CCED is the date when you want contact's Web access to end. It may not be the same as end of program. When CCED date is reached... contact is given Alumni access. (CCED can be changed at any time.)

“Contact Details” are not required, but may be useful to run your business and potentially for reporting to your customers. I suggest you put in the City, State, Country as a minimum.



### Contact Details

Title: ⓘ	<input type="text"/>	Address 1: ⓘ	<input type="text"/>
Middle Name/Initial: ⓘ	<input type="text"/>	Address 2: ⓘ	<input type="text"/>
Phone: ⓘ	<input type="text"/>	City: ⓘ	<input type="text"/>
Mobile Phone: ⓘ	<input type="text"/>	State/Region: ⓘ	<input type="text"/>
Fax: ⓘ	<input type="text"/>	Postal Code: ⓘ	<input type="text"/>
Alternate Email: ⓘ	<input type="text"/>	Country: ⓘ	<input type="text"/>

### “Other Details”:

#### Other Details

Coach: ⓘ	<input type="text"/>	Career Centre Theme: ⓘ	<input type="text"/>
Company: ⓘ	<input type="text"/>	Project(s): ⓘ	<input type="text"/>
Program Start Date: ⓘ	<input type="text"/>	Program End Date: ⓘ	<input type="text"/>
Status: ⓘ	<input type="text"/>	Landed/Resettled Date: ⓘ	<input type="text"/>
Outcome: ⓘ	<input type="text"/>	Coaching Hours: ⓘ	<input type="text"/>
Time Zone: ⓘ	<input type="text"/>	Send Career Week: ⓘ	<input type="checkbox"/>
Programme Type: ⓘ	<input type="text"/>		

Coach – Assign a coach from the drop-down menu ... You can leave blank if the candidate has not started yet or you don't know yet. (You can add later by editing Contact from inside the CCM.) **Leave “coach” blank if you are assigning to another OIGP firm.**

Company – Means the company the candidate is associated with (usually your customer). Firm Admin has to set up companies in the CCM [CCM-Companies] and assign them to an account manager, Firm Admin or Business Developer.

Program Start Date – For reporting only and for contact page

Status –

Engaged = Candidate has started

Not Engaged = Assigned, not started, don't have email, placeholder for later edit

Expired = Assigned, never started, never billed etc. – placeholder if needed

Done = Case is finished before program auto-shifts to Alumni

On Hold = Still active, but program is frozen until they re-engage

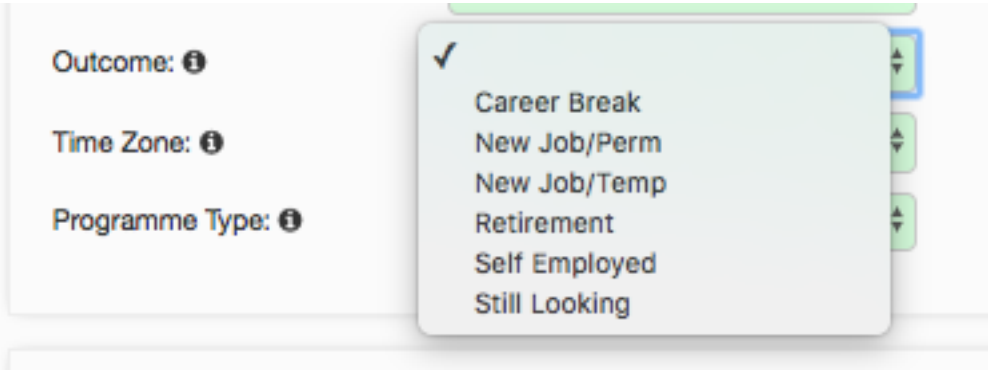
Extended = Addition to original program, possible additional billing

Inactive =

Engaged  
Not Engaged  
Expired  
Done  
On Hold  
Extended  
Inactive  
Alumni

Alumni = Engaged and reached end of program time ... can change manually also

Outcome – The results at the end of service.



Time Zone – Pull down for candidate’s time zone which is an optional marker for the coach’s convenience if candidate is not in your normal time zone

Programme Type – If you have established them, they will show.

A screenshot of a web form titled 'Other Details'. It contains several input fields and dropdown menus arranged in two columns. The fields include: 'Coach: ⓘ' (dropdown), 'Company: ⓘ' (dropdown), 'Program Start Date: ⓘ' (text), 'Status: ⓘ' (dropdown), 'Outcome: ⓘ' (dropdown), 'Time Zone: ⓘ' (dropdown), 'Programme Type: ⓘ' (dropdown), 'Career Centre Theme: ⓘ' (dropdown), 'Project(s): ⓘ' (text), 'Program End Date: ⓘ' (text), 'Landed/Resettled Date: ⓘ' (text), 'Coaching Hours: ⓘ' (text), and 'Send Career Week: ⓘ' (checkbox). All dropdown menus and text boxes are highlighted in light green.

Career Center Theme – Every firm’s portal comes with 2 themes: Alumni Exempt and Master Theme. The Master Theme is set as the default unless you change it in the Theme Manager. Any other themes you create [Admin Area – Theme Manager] will be shown here also. If you leave blank, the default will be provided.

Project(s) – If you have created Projects [under CCM-Companies-Projects]... then programs and/or projects will pop up after you pick the Company. Useful for reporting and looking at groups of people in service.

Program End Date – For reporting only and for contact page

Landed/Resettled Date – For reporting only

Coaching Hours – Either total hours or units... When Coach does notes and puts in time or units, it will calculate from this number

Send Career Week – Checking this off will tell the system to email the candidate a career-focused newsletter each Friday. The candidate can opt out.


### “Custom Fields”

All custom fields are optional...Contents are available in reports.

Custom Fields			
Last Day Worked:	<input type="text"/>	Candidate Assigned:	<input type="text"/>
Program Length:	<input type="text"/>	Overall Satisfaction 1-5:	<input type="text"/>
Coach Satisfaction 1-5:	<input type="text"/>	Materials Satisfaction 1-5:	<input type="text"/>
OI Solutions Satisfaction 1-5:	<input type="text"/>	Cost Center:	<input type="text"/>
Program Details:	<input type="text"/>	Years with company:	<input type="text"/>
Budget:	<input type="text"/>		

If you want the system to send a notification to the contact (candidate) upon creating the account, check off box below...

### Welcome Email

Send welcome email: 

Sent from – Put in the name of the person or firm you want the email to be from  
 The system does not have a stock message as of yet... Put one in the Custom message box if you want it to welcome them to OI Solutions

580 chars remaining

You can also copy the Coach on this access information if you wish  
 Check off the “Include login link” unless it’s in your custom message.

**Create Account**

Click create account ... If you have done it correctly, you will see a table like the one below confirming the account was created.

First Name	Last Name	Email	Password	User ID/Reference
abby2	abb2	abby2.abby2@abby.com	abby123	41224c11-4881-4b3d-85d3-9b932187849f

**Download Table**

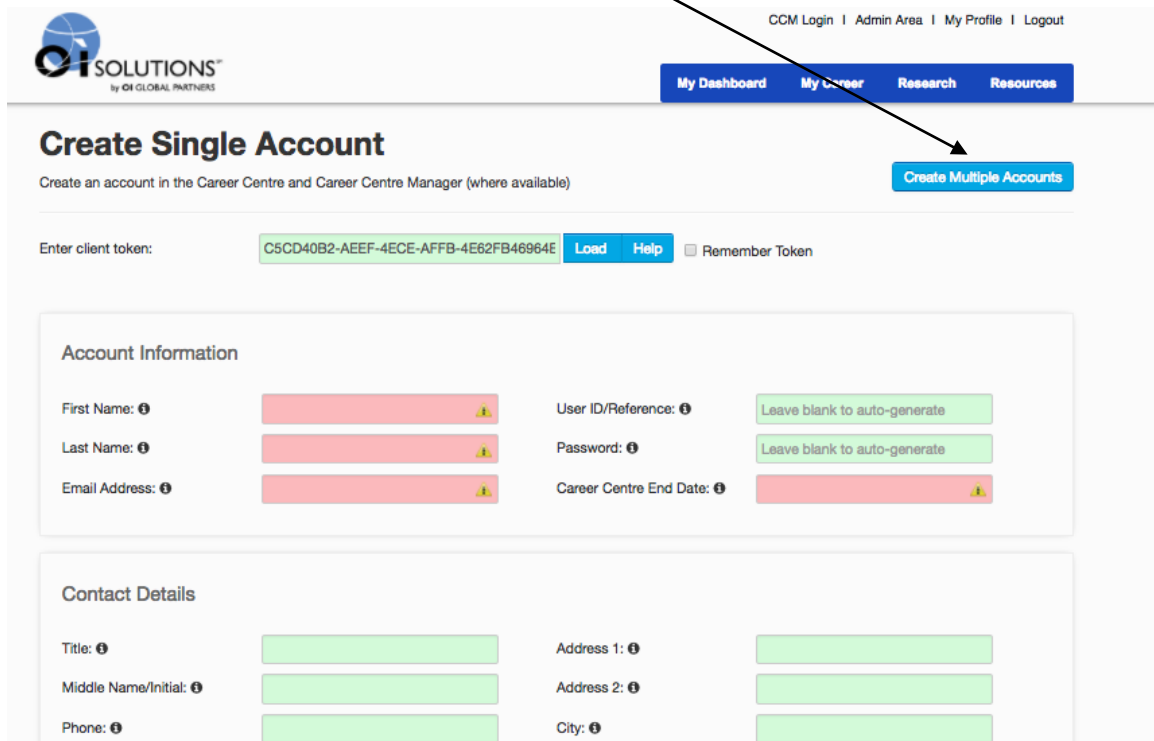
## 12. How do I create multiple new contacts?

### Short Answer:

- Login to the OI Solutions website
- Go to the top right of the page
- Click on Admin Area
- Click on Create Contacts
- Pick “Create Multiple Accounts” on right
- Put in firm token and Load
- Download spreadsheet, fill out form, save and update spreadsheet and create contacts

### Long Visual Answer

- Click on Admin Area
- Click on Create Contacts
- Select **Create Multiple Accounts** on right



Download Spreadsheet (This contains all your coaches, companies, and projects on your system at that moment.)

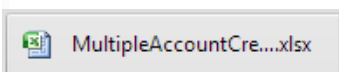
# Create Multiple Accounts

Create accounts in the Career Centre and Career Centre Manager

[Create Single Accounts](#)

Enter client token:     Remember Token

1	Click the button to download the spreadsheet template	<input type="button" value="Download Spreadsheet"/>
2	Open the downloaded spreadsheet template	If you are running <i>Microsoft Office 2003</i> or earlier, to open the spreadsheet, please install <a href="#">Microsoft Office Compatibility Pack</a>
3	Complete the spreadsheet template with all new account details	Columns marked with * character are mandatory
4	Upload the completed spreadsheet template	<input type="button" value="Choose File"/> No file chosen
4	OR, select all spreadsheet cells including the header rows Copy all cells to the clipboard Paste all data into this input box	<div style="border: 1px solid #ccc; padding: 5px; background-color: #e0ffe0;">             Paste all data here from the spreadsheet template         </div> <input type="button" value="Clear Form"/>



Open created spreadsheet and fill in information, using pull-downs as needed.

**Account Creation Form** - Create multiple accounts in the Career Centre and Career Centre Manager

ID/Reference	First Name*	Middle Name	Last Name*	Email Address*	Password	Coach	Company	Title	Alternat
<small>Your internal ID for the Contact - it must be unique</small>	<small>Contact's first name</small>	<small>Contact's middle initial or name</small>	<small>Contact's last name</small>	<small>Email that the Contact will use to access the Career Centre - it must be unique</small>	<small>If blank, a password will be auto assigned</small>	<small>Select Coach from dropdown list</small>	<small>Select Company name from dropdown list</small>	<small>E.g. Dr</small>	<small>Another email a Cont</small>
<b>Example:</b>									
mycompany_01	John	T	Smith	johnsmith@example.com		Bill Taylor	Google	Mr	john_smith@e
<b>Add your Contact account details below. When completed copy/paste all columns into the account creation web page.</b>									

No spaces in welcome message... watch date format... when done, save...

**Following fields are mandatory:**

First Name

Last Name

Email

Career Center End Date

Status (must be one of the options from pull-down list)

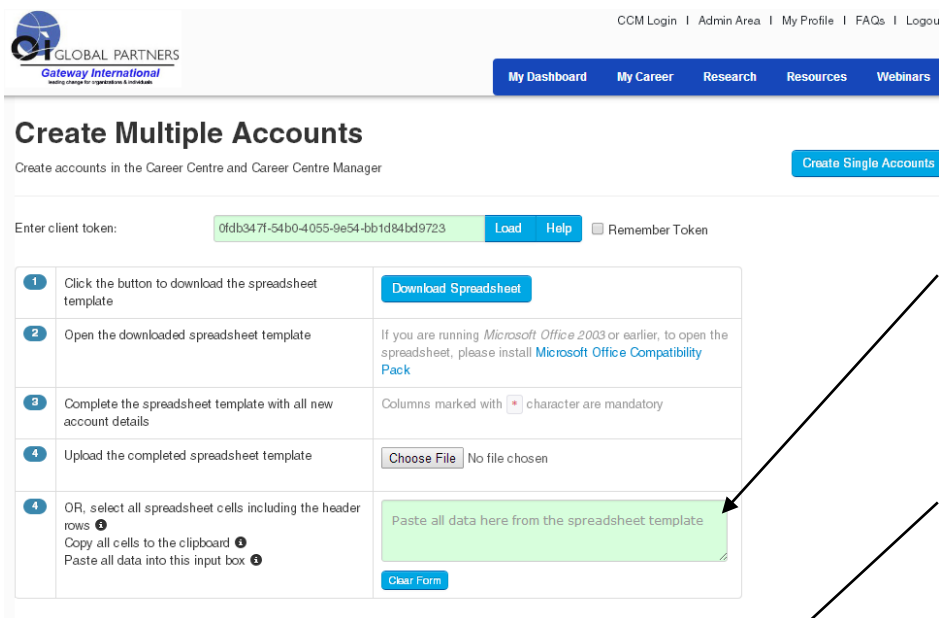
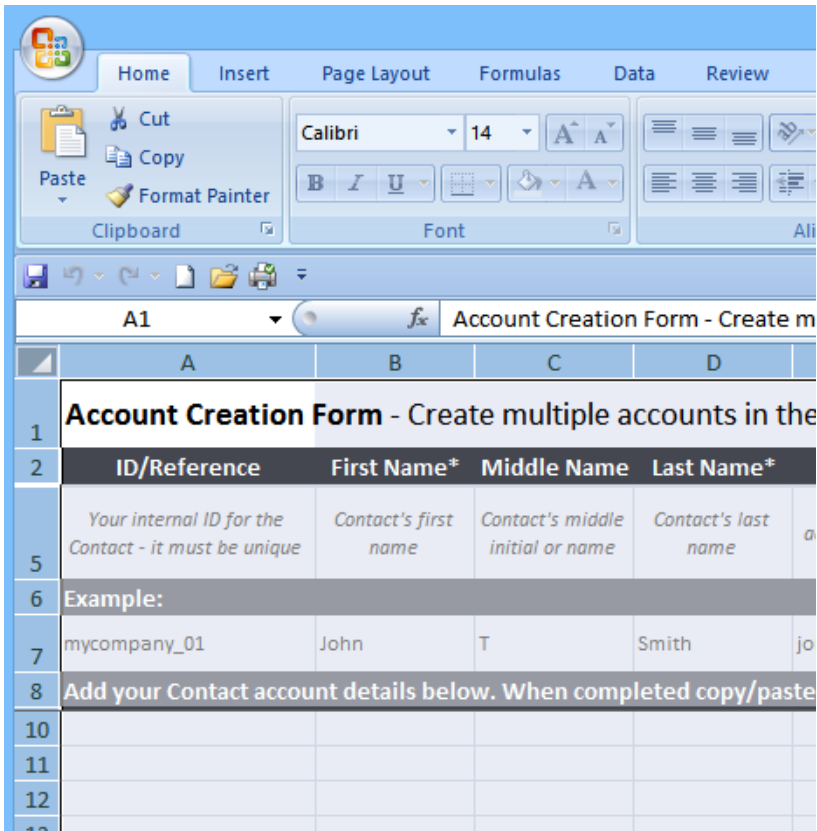
Use other fields only if you want to ... some have pull-downs... you have to use the options on these pull-downs ... can't add others ... you can copy pull-down entries

Pull-down fields if used: Coach; Company; Outcome; Time zone; Career Center Theme (will use default if not picked); Projects;

Refer Account to Firm (used when referring to another partner ... Do not fill in coach in this case)

In spreadsheet, Go to the top left and cell top of row 1, left of cell A

This will highlight the whole spreadsheet... Ctrl C (to copy)



**Method 1**  
**Cut and Paste**  
 Go back to the Multiple Accounts page

Paste (Ctrl V) into the box

After you paste in the spreadsheet, the "Create accounts" will appear and click on the button....

5 Click the button to create your accounts [Create accounts](#)

## Create Multiple Accounts

Create accounts in the Career Centre and Career Centre Manager [Create Single Accounts](#) Choose file

Enter client token:  [Load](#) [Help](#)  Remember Token

1	Click the button to download the spreadsheet template	<a href="#">Download Spreadsheet</a>
2	Open the downloaded spreadsheet template	If you are running <i>Microsoft Office 2003</i> or earlier, to open the spreadsheet, please install <a href="#">Microsoft Office Compatibility Pack</a>
3	Complete the spreadsheet template with all new account details	Columns marked with * character are mandatory
4	Upload the completed spreadsheet template	<a href="#">Choose File</a> No file chosen
4	OR, select all spreadsheet cells including the header rows Copy all cells to the clipboard Paste all data into this input box	<div style="border: 1px solid #ccc; padding: 5px; background-color: #e0ffe0;">Paste all data here from the spreadsheet template</div> <a href="#">Clear Form</a>

“Create accounts” will appear and click on the button....





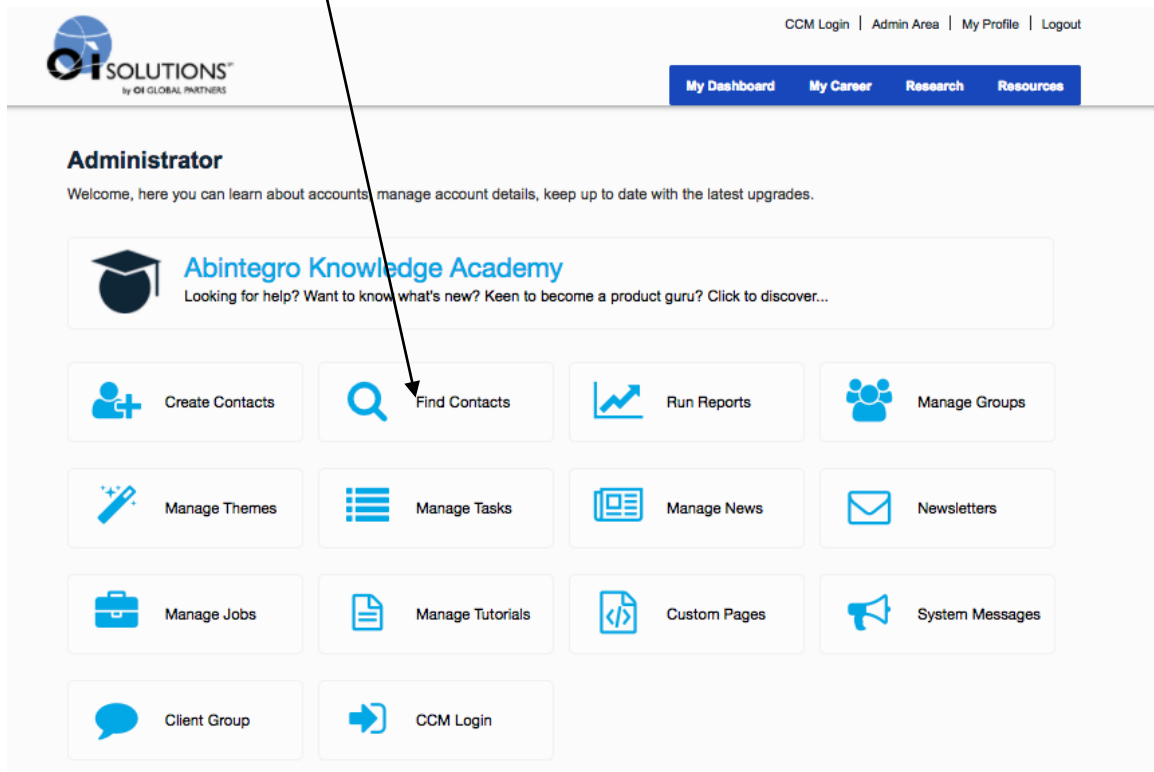
### 13. How do I find a contact in the Admin Area?

*Short Answer:*

- Login to the OI Solutions website
- Go to the top right of the page
- Click on Admin Area
- Click on Find Contacts
- Put in firm token and Load
- Put in last name or email address and hit Go

*Long Visual Answer*

- Click on Admin Area
- Click on Find Contacts



Put in firm token and Load

Put in last name or email address and hit go

## Find Accounts

Enter client token:   Remember Token

Select group:  [Load groups](#)

Username/Email:

First Name:

Last Name:

Accounts						
First Name	Last Name	Username/Email	Password	Theme	Account End	Last Login
Abby	Abby	abby.abby@abby.com	abby123	OIP Exempt	31/12/2014	02/03/2014 <a href="#">Edit</a>

Results will show up on screen, if you need to change... click on edit  
 System will put you into the CCM, into the contact's editable screen... you can update, change all items from here.

OI SOLUTIONS OI Solutions - Career Center Manager Recently viewed

Dashboard Companies Projects **Contacts** Reports Administrator

**Contact**

\* First Name:  \* Last Name:

Middle Name/Initial:  Title:

---

Email:  Alternate Email:

Phone:  Mobile Phone:

Fax:  Alternate Phone:

---

Address1:  Address2:

City:  Country:

Postal Code:  State/Region:

Time Zone:  Tags: (comma-separated)

---

Company ID/Staff No.:  Previous Job Title:

## 14. How do I create/edit users? (Coach – Firm Admin – Business Developer)

*Short Answer:*

Login to the OI Solutions website

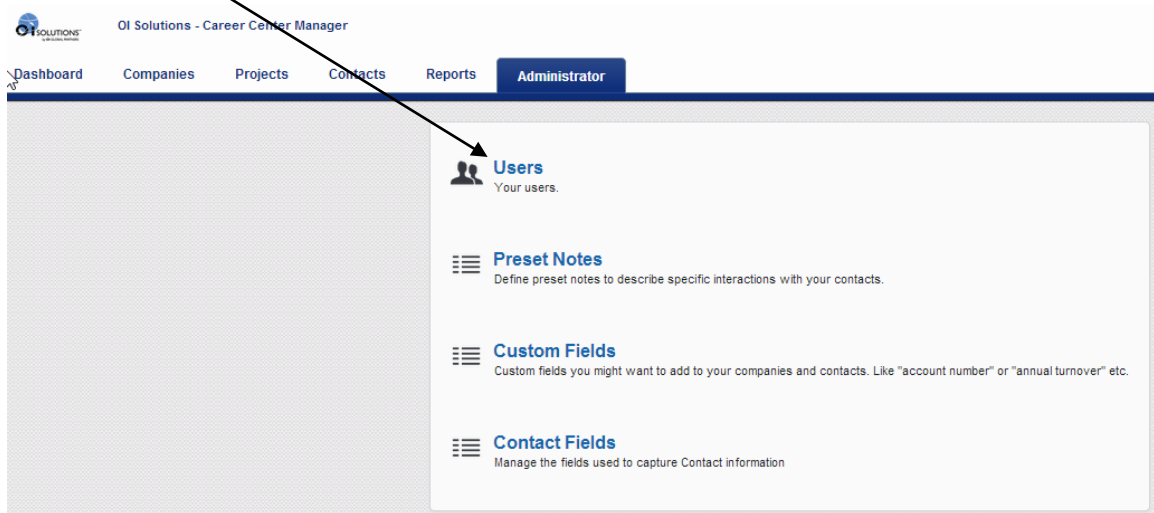
Go to the top right of the page

Click on CCM

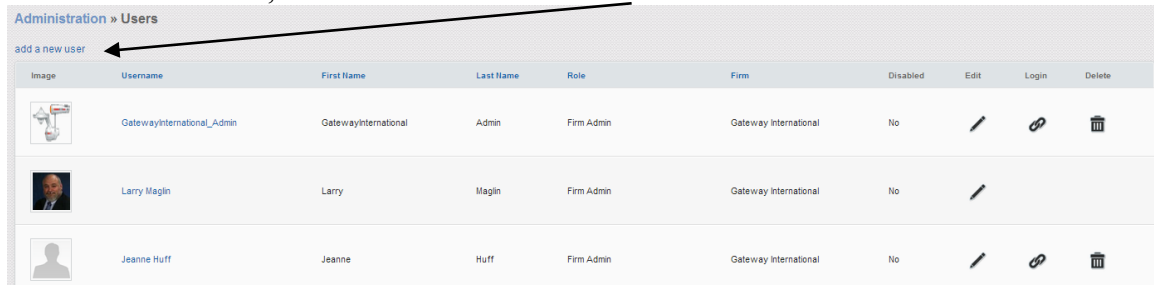
Go to Administrator



Pick Users



To ADD a new user, click on Add a new user



OI SOLUTIONS  
OI Solutions - Career Center Manager

Dashboard Companies Projects Contacts Reports **Administrator**

Administration » Users » Create a new user

Create a new user

\* Username:

\* Email:

\* First name:

\* Last name:

\* Password:

\* Firm:

\* Role:  Firm Admin  
 Business Development  
 Coach  See all Firm Contacts

Contact Image  
 picture file, max 1mb  
 (leave blank to reset)  
 No file chosen

Add username ... First last name  
 Email = Valid email address  
 First name  
 Last name

Password – You must create this (send to new user)  
 Firm – pick your own... only option

**Pick a role:**  
 Firm Admin – Can see and do all  
 BD – Can see all of their firm's companies, clients assigned to them, and other companies in OIGP  
 Coach – Can only see clients assigned to them

Picture candidates will see

Hit create... done...

To Edit a user, click on the pencil

Administration » Users

add a new user

Image	Username	First Name	Last Name	Role	Firm	Disabled	Edit	Login	Delete
	GatewayInternational_Admin	GatewayInternational	Admin	Firm Admin	Gateway International	No			
	Larry Maglin	Larry	Maglin	Firm Admin	Gateway International	No			
	Jeanne Huff	Jeanne	Huff	Firm Admin	Gateway International	No			

You can edit the information, delete user, reset the password, change the picture, and change the role, etc.

The screenshot displays the 'OI Solutions - Career Center Manager' interface. The navigation menu includes Dashboard, Companies, Projects, Contacts, Reports, and Administrator. The current page is 'Administration » Users » Edit user'. The main form is titled 'Edit user - Jeanne Huff' and contains the following fields:

- \*Username: Jeanne Huff
- \*Email: jeanne.huff@giginmai
- \*First name: Jeanne
- \*Last name: Huff
- Phone number: [empty]
- Location: [empty]
- \*Firm: Gateway International
- Email signature (for outgoing emails from CCM): [empty text area]
- Other notes (from admin): [empty text area]

Additional features include:

- Change password:** Fields for 'New password' and 'Confirm new password', with an 'OK' button.
- Contact Image:** A placeholder for a profile picture with an 'upload' button. Text indicates 'picture file, max 1mb (leave blank to reset)'. A 'Choose File' button shows 'No file chosen'.
- \* Role:** Radio buttons for 'Firm Admin' (checked), 'Business Development', 'Coach', and 'See all Firm Contacts'.
- Disable

At the bottom of the form are two buttons: 'save' and 'delete user'. An arrow points to the 'save' button.

Hit save when done

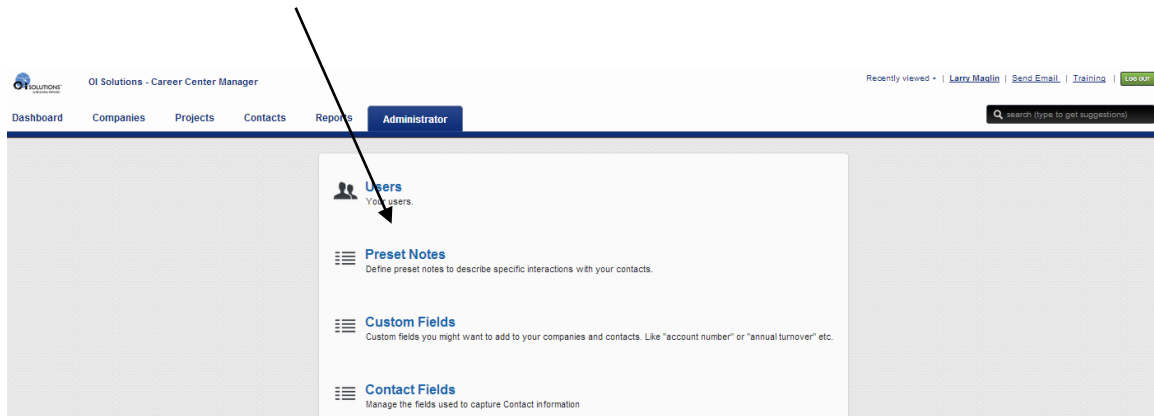
## 15. How do I add/edit/change static notes?

### Short Answer:

Login to the OI Solutions website  
Go to the top right of the page  
Click on CCM  
Click on Administrator  
Click on Preset Notes  
Edit / Change / Add as needed

### Long Visual Answer

Get to Preset Notes as above



Every firm starts with a standard block of preset notes in their system.

One of the first things you should decide is whether you want your coaches to use:

- Only Preset Notes
- Only Free Form Notes they will write themselves
- Both options

It is the opinion of the Technology Division to recommend the partner **use Preset Notes only**. This eliminates the chance of inappropriate notes from a coach about a client and you don't have to waste administrative time reviewing what coaches are writing down.

The screenshot shows the 'Administration >> Preset Notes' form. The 'Free Text Notes Allowed' checkbox is unchecked, and the 'Preset Notes Allowed' checkbox is checked. Arrows point to these checkboxes from the text below. The form includes fields for 'Add note:', 'Category 1\*', 'Category 2\*', 'Firm', 'Company', and 'Note\*'. The 'Firm' dropdown is set to 'Gateway International' and the 'Company' dropdown is set to 'All Companies'. There is an 'Add Note' button.

You can check off Free Text Notes Allowed and/or Preset Notes Allowed

You can edit / change / copy / delete notes

Category 1	Category 2	Firm	Company	Note	Edit	Delete	Copy
Outplacement (OP)	Overview	Gateway International	All Companies	OP - Overview of Program			Copy
Outplacement (OP)	Overview	Gateway International	All Companies	OP - Co-Managed Program & options			Copy
Outplacement (OP)	Overview	Gateway International	All Companies	OP - Discussion of Background and Skills			Copy
Outplacement (OP)	Overview	Gateway International	All Companies	OP - Review of client's plan for Achievement			Copy

As received, all notes are for “All Companies”

When the coach is entering Preset Notes, they see major and minor categories.  
Major category [Outplacement (OP)] Minor category [ Overview ]

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	<input type="checkbox"/>	

Outplacement (OP) Assessments

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

Outplacement (OP) Resume Creation

<input type="checkbox"/>	OP-How to do C.A.R.s via Functional Skills Matrix	<input type="checkbox"/>	OP-Review and modification of C.A.R.s
<input type="checkbox"/>	OP-Types and Uses of Resumes	<input type="checkbox"/>	OP-How to Modify Resume for Specific Opportunity
<input type="checkbox"/>	OP-Draft Resume or Bio created and sent for review	<input type="checkbox"/>	OP-LinkedIn Profile
<input type="checkbox"/>	OP-Review of resume or Bio	<input type="checkbox"/>	OP-Resume Approved by client
<input type="checkbox"/>	OP-Bio Approved by client	<input type="checkbox"/>	OP-Client wants to use own resume or Bio

Outplacement (OP) Recruiters

You can modify, or add new headers.

**Administration** » Preset Notes

Define preset notes to describe specific interactions with your contacts.

Add note:					
Category 1 *	Category 2 *	Firm	Company	Note *	
<input type="text"/>	<input type="text"/>	Gateway International ▼	All Companies ▼	<input type="text"/>	<input type="button" value="Add Note"/>
Free Text Notes Allowed:	<input type="checkbox"/>	Preset Notes Allowed:	<input checked="" type="checkbox"/>		

You can add new notes and new categories if you wish... you can make them for “All Companies” or specify a company that is unique to that Note.



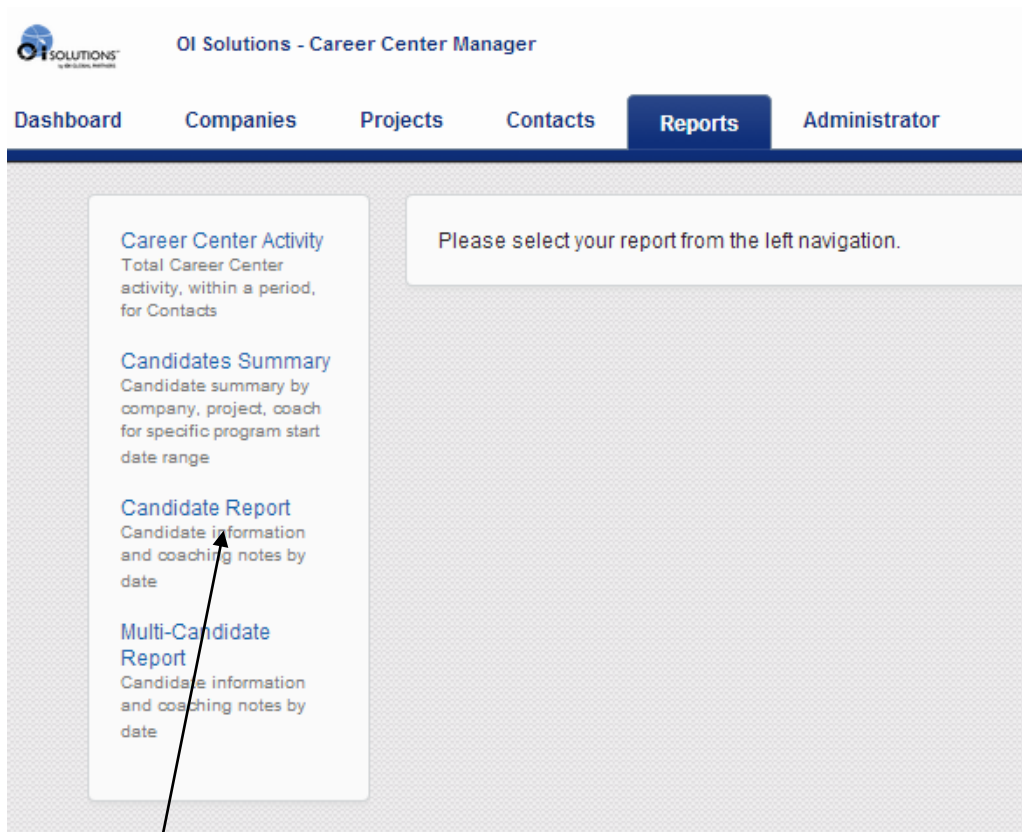
## 16. How do I run reports? (Candidates – Customers – System status)

*Short Answer:*

Login to the OI Solutions website  
Go to the top right of the page  
Click on CCM  
Click on Reports  
Click on type of report you wish to run

*Long Visual Answer*

Get to Reports as above



Pick the type of report you wish to run:

## Candidate Report

Start typing the name of the contact (candidate) in the box... A list of names will appear  
... Pick the name of the person you wish to run the report for.  
Pick the date range you wish the report to encompass.

OI SOLUTIONS™  
OI Solutions - Career Center Manager

Dashboard Companies Projects Contacts **Reports** Administrator

**Candidate Report**  
Candidate information and coaching notes by date

Dates  to

Contact

**Career Center Activity**  
Total Career Center activity, within a period, for Contacts

**Candidates Summary**  
Candidate summary by company, project, coach for specific program start date range

**Candidate Report**  
Candidate information and coaching notes by date

**Multi-Candidate Report**  
Candidate information and coaching notes by date

Once you set the parameters, you can also download this report as a PDF

**Candidate Report**  
Candidate information and coaching notes by date

Dates  to

Contact

Example: contact: Abby Abby – Date: Nov1 to March 6, 2014

**Candidate Report**  
Candidate information and coaching notes by date

Dates: 01 Sep 2013 to 06 Mar 2014

Contact: Abby Abby [Download PDF](#)

Candidate Progress Report OI Partners - Gateway International

---

Candidate Information

<b>Name:</b>	Abby Abby	<b>Company:</b>	American Express
<b>Location:</b>	Anywhere NJ	<b>Project(s):</b>	Band 35 - Blended
<b>LDW:</b>	30 Nov 2013	<b>Project Description(s):</b>	3 months, 4 months OI Solutions, can meet face to face, extensions are available
<b>Approved:</b>	01 Nov 2013	<b>Company ID:</b>	
<b>Started:</b>	01 Nov 2013	<b>Landed Date:</b>	
<b>End Date:</b>	28 Feb 2014	<b>Cost Center:</b>	012365489
<b>Status:</b>	Alumni	<b>Outcome:</b>	Still Looking
<b>Advisor:</b>	Larry Maglin	<b>Comment:</b>	

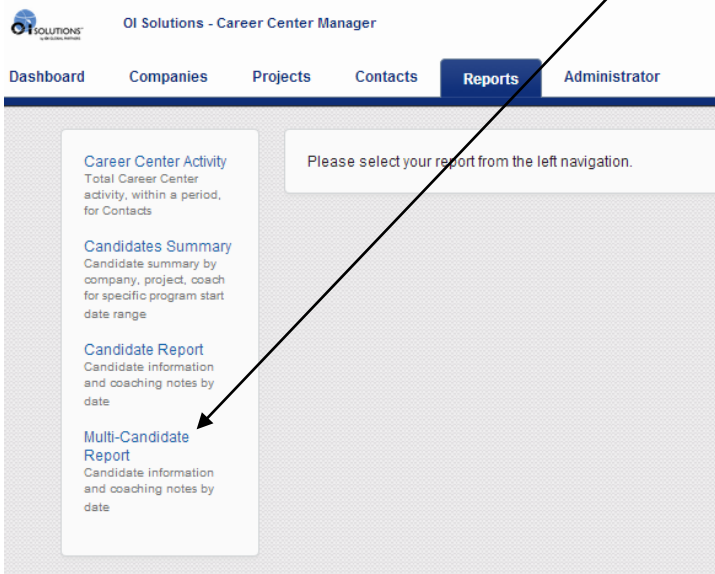
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Meetings and Topics Information

<p>04 Feb 2014</p> <p>20 Dec 2013</p> <p>26 Nov 2013</p> <p>19 Nov 2013</p> <p>12 Nov 2013</p> <p>01 Nov 2013</p>	<ul style="list-style-type: none"> <li>• OP - Overview of Program</li> <li>• OP-Discuss Unemployment - Severance Issues</li> <li>• OP-Discuss Finances</li> <li>• OP-Discuss Family and Relocation Options</li> </ul> <ul style="list-style-type: none"> <li>• OP-Networking Status</li> <li>• OP-Opportunities Status and Updates</li> <li>• Sch-Next meeting scheduled</li> <li>• OP - Discuss Specific Network Meetings</li> <li>• OP - Discuss Status and Feelings of Campaign</li> </ul> <ul style="list-style-type: none"> <li>• OP-Resume Approved by client</li> <li>• OP-How to find recruiters - search firms</li> <li>• OP-How to use recruiters - search firms</li> <li>• OP- How to use Keywords in LinkedIn so Recruiters can find you</li> <li>• OP-How to do Recruiter Letter</li> <li>• OP-How to do Networking - (Ads-Recruiters-Personal)</li> </ul> <ul style="list-style-type: none"> <li>• OP-Types and Uses of Resumes</li> <li>• OP-Draft Resume or Bio created and sent for review</li> <li>• OP-LinkedIn Profile</li> <li>• OP-Review of resume or Bio</li> <li>• OP-Bio Approved by client</li> </ul> <ul style="list-style-type: none"> <li>• OP- Which Assessments to take (OI Solutions®)</li> <li>• OP-Discuss Career Options (including Entrepreneurial or Retirement)</li> <li>• OP-Develop Clients Objective(s)</li> <li>• OP-Review Industry Options</li> </ul> <ul style="list-style-type: none"> <li>• OP - Overview of Program</li> <li>• OP - Discussion of Background and Skills</li> <li>• OP - Review of client's plan for Achievement</li> <li>• OP-Discuss Unemployment - Severance Issues</li> <li>• OP-Discuss Severance</li> <li>• OP-Discuss Finances</li> <li>• OP-Discuss Family and Relocation Options</li> </ul>
---	--

OP (Outplacement) ENT (Entrepreneurial) RET (Retirement) SCH (Scheduling) OTH (Other)

To run a **Multi-Candidate Report** ... From Reports, pick



OI Solutions - Career Center Manager

Dashboard Companies Projects Contacts **Reports** Administrator

Career Center Activity  
Total Career Center activity, within a period, for Contacts

Candidates Summary  
Candidate summary by company, project, coach for specific program start date range

Candidate Report  
Candidate information and coaching notes by date

**Multi-Candidate Report**  
Candidate information and coaching notes by date

Please select your report from the left navigation.

In the Multi-Candidate Report ... Pick the criteria of information you want. As you pick criteria, the total number of records will show in red near the Go button. You can pick a combination of some or all to filter the information.

**Multi-Candidate Report**  
Candidate information and coaching notes by date

Include notes between these dates  
01 Sep 2013 to 06 Mar 2014

Company All Companies Projects All Projects Coach All Coaches Status All Status **5206 Contacts found** Go Max 300

Example:  
Picked Demo Co, Coach: Larry Maglin, Status: Engaged  
Date: Sept 1, 13 to Mar 4, 2014  
Got back 4 contacts ....

**Multi-Candidate Report**  
Candidate information and coaching notes by date

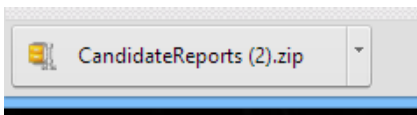
Include notes between these dates  
01 Sep 2013 to 06 Mar 2014

Company DemoCo Projects All Projects Coach Larry Maglin Status Engaged **4 Contacts found** Go Max 300

Name	Company	Project	Coach	Status	Download
Vivian Lee	DemoCo		Larry Maglin	Engaged	<input checked="" type="checkbox"/>
Wayne Carlson	DemoCo		Larry Maglin	Engaged	<input checked="" type="checkbox"/>
abby1 abby1	DemoCo		Larry Maglin	Engaged	<input checked="" type="checkbox"/>
Paige Sullivan	DemoCo		Larry Maglin	Engaged	<input checked="" type="checkbox"/>

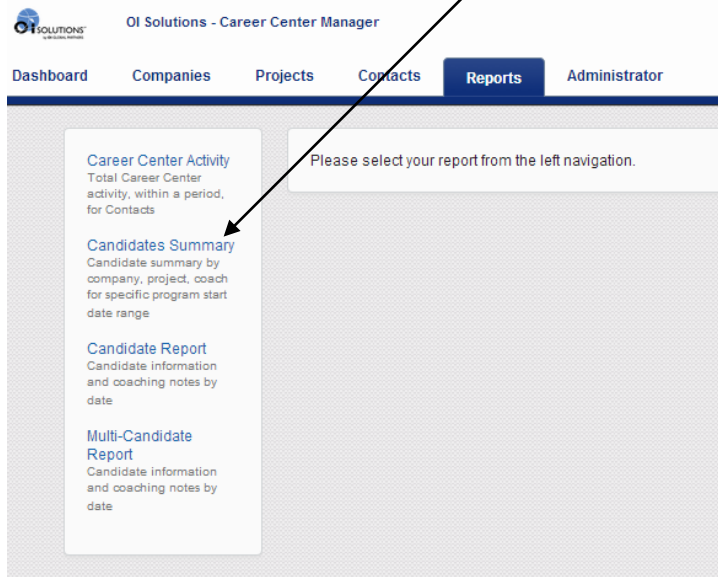
Download

Can pick which ones to download (default is all) and click download



System will generate a Zip file which contains the 4 PDF documents, one for each contact.

To run a Candidate Summary report, from Reports pick ...



You will be offered an input screen that will allow you to pick a data range and various fields of data ...

**Candidate Summary Report - OI Partners - Gateway International**  
 Candidate summary by company, project, coach for specific program start date range

Dates: 03 Mar 2014 to 10 Mar 2014  Show All

Company: All Companies Projects: All Projects Coach: All Coaches Status: All Statuses

Example:

Demo Company – All Projects – All Coaches – Status: Engaged ... results below

You can export to CSV (Excel)

**Candidate Summary Report - OI Partners - Gateway International**  
 Candidate summary by company, project, coach for specific program start date range

Dates: 01 Oct 2013 to 10 Mar 2014  Show All

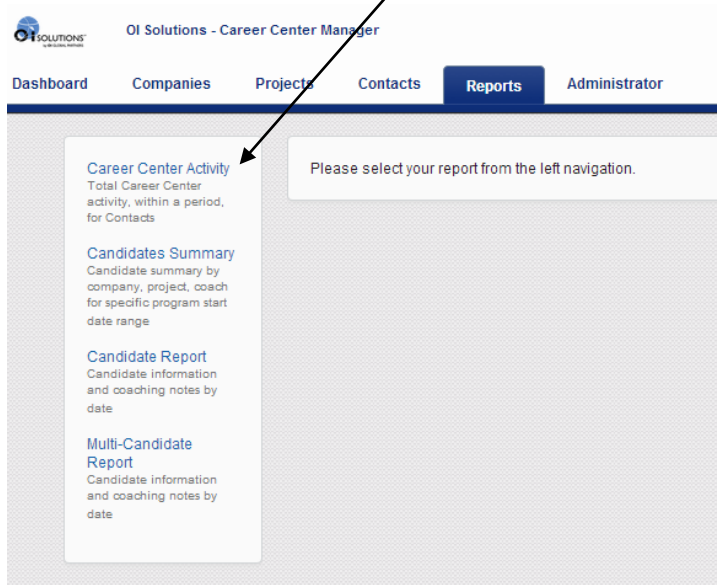
Company: DemoCo Projects: All Projects Coach: All Coaches Status: Engaged

Cost Center	Last Name	First Name	Project(s)	Project Description(s)	Program start date	Status	Assigned to	Company
Demo Company	abb2	abby2			05 Mar 2014	Engaged	GatewayInternational Admin	DemoCo
	abby1	abby1			01 Jan 2014	Engaged	Larry Maglin	DemoCo
	Beccarelli	Michele			01 Nov 2013	Engaged		DemoCo
	Carlson	Wayne			14 Nov 2013	Engaged	Larry Maglin	DemoCo
	Lynch	Patrick			01 Nov 2013	Engaged		DemoCo
	Maglin	Carol			05 Nov 2013	Engaged		DemoCo
	McNamara	SallyAnn			01 Nov 2013	Engaged		DemoCo
	Mincarelli	Patricia			25 Oct 2013	Engaged	Dennis Owen	DemoCo
	Sullivan	Paige			15 Jan 2014	Engaged	Larry Maglin	DemoCo
	Yadouga-Schwinn	Kristen			25 Nov 2013	Engaged	Anthony Yadouga	DemoCo

The CSV export will have the following fields:

Cost Center  
Last Name  
First Name  
Title  
Email  
Alternate Email  
Mobile Phone  
Fax  
Alternate Phone  
Address  
City  
State  
Country  
Post Code  
Company ID  
Company Name  
Outcome  
Landed Date  
Career Center End Date  
Previous Job Title  
Coaching Hours/Units  
Project(s)  
Project Description(s)  
Program Start Date  
Program End Date  
Status  
Assigned to  
Feedback  
Comments  
LDW  
Candidate Assigned  
Last Date to Engage  
Overall Satisfaction 1-5  
Coach Satisfaction 1-5  
Materials Satisfaction 1-5  
OI Solutions Satisfaction 1-5  
Contact Notes

## Career Center Activity for your firm



You will have the option of:

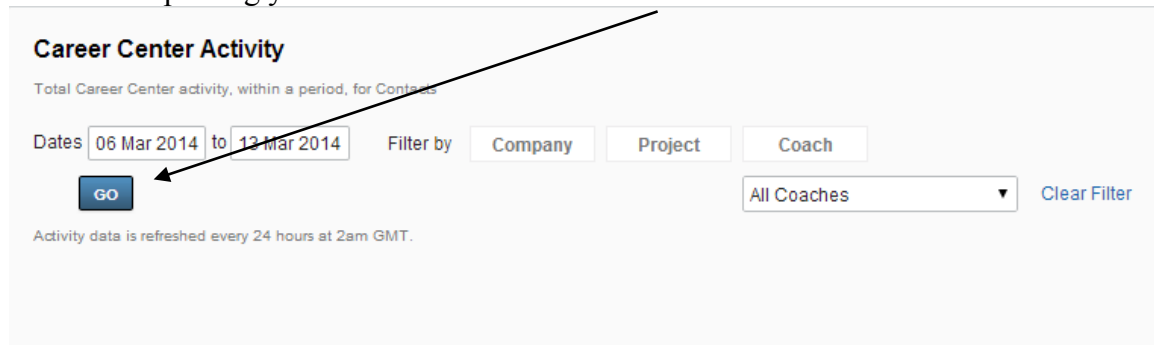
Date range

All companies or a specific one

All projects or a specific one

All Coaches or a specific one

When done picking your criteria .... Click on GO



Report that includes your criteria will be displayed as below ...

### Career Center Activity

Total Career Center activity, within a period, for Contacts

Dates: 06 Mar 2014 to 13 Mar 2014 Filter by: Company Project Coach

GO First Advantage Clear Filter

Activity data is refreshed every 24 hours at 2am GMT.

Results from 6 Mar 2014 to 13 Mar 2014

#### Period Summary ?

26 contacts 46 activities

#### Contact's Activity 26 contacts ?

User	Email	Last Login
C.Graeve	magicalfangirlgirl@gmail.com	13 Mar 2014
P.Schamens	pamela.schamens@verificationsinc....	12 Mar 2014
T.McGill	trblais2010@gmail.com	12 Mar 2014
P.Waite	pwaite3@ivv.net	12 Mar 2014
K.Wittrock	kelly.wittrock@yahoo.com	11 Mar 2014
D.Burch	darci.burch@hotmail.com	11 Mar 2014
D.Lucas	lucas_derek@hotmail.com	11 Mar 2014
D.Adolphsen	darlyn@wat.midco.net	10 Mar 2014
L.Anderson	lana.anderson28@yahoo.com	10 Mar 2014
C.Howell	cheri.howell@verificationsinc.com...	10 Mar 2014
E.Haliburton	ehaliburton@yahoo.com	10 Mar 2014
M.Fernandez	mfernand1@optonline.net	10 Mar 2014
M.Corbin	furdude@q.com	9 Mar 2014
S.Gregersen	suequills@wat.midco.net	9 Mar 2014
J.Lear	james.lear@southeasttech.edu	9 Mar 2014
M.Nikolas	hubcity410@yahoo.com	9 Mar 2014
K.Kishiyama	kkishiyama@aol.com	8 Mar 2014
S.Weppler	stacy@wepplanet.com	8 Mar 2014
R.Brenden	drbrenden@wow.way.net	7 Mar 2014
M.Boehmer	mauryboehmer@yahoo.com	7 Mar 2014
D.Cook	dj.cook0404@gmail.com	7 Mar 2014
T.Riter	miker@wat.midco.net	6 Mar 2014

#### Tools Activity 12 ?

Tool	Percentage
eGold Recruitment	33.3%
Newsroom	25%
Job Search Engine	16.7%
Lexis Nexis	8.3%
Research & Network	8.3%
Action Plan	8.3%

#### Modules Activity 34 ?

Module	Percentage
Accomplishments Nonex...	8.8%
Cover letter templates n...	8.8%
Filing for Unemployment	8.8%
Lexis Nexis Landing	8.8%
Online Resources Exempt	8.8%
Tough Interview Questio...	8.8%
References	8.8%
Adjusting to Job Loss	8.8%
Staffing Agencies	8.8%



## 17. How do I set up or edit a company or see OIGP customers?

*Short Answer:*

Login to the OI Solutions website

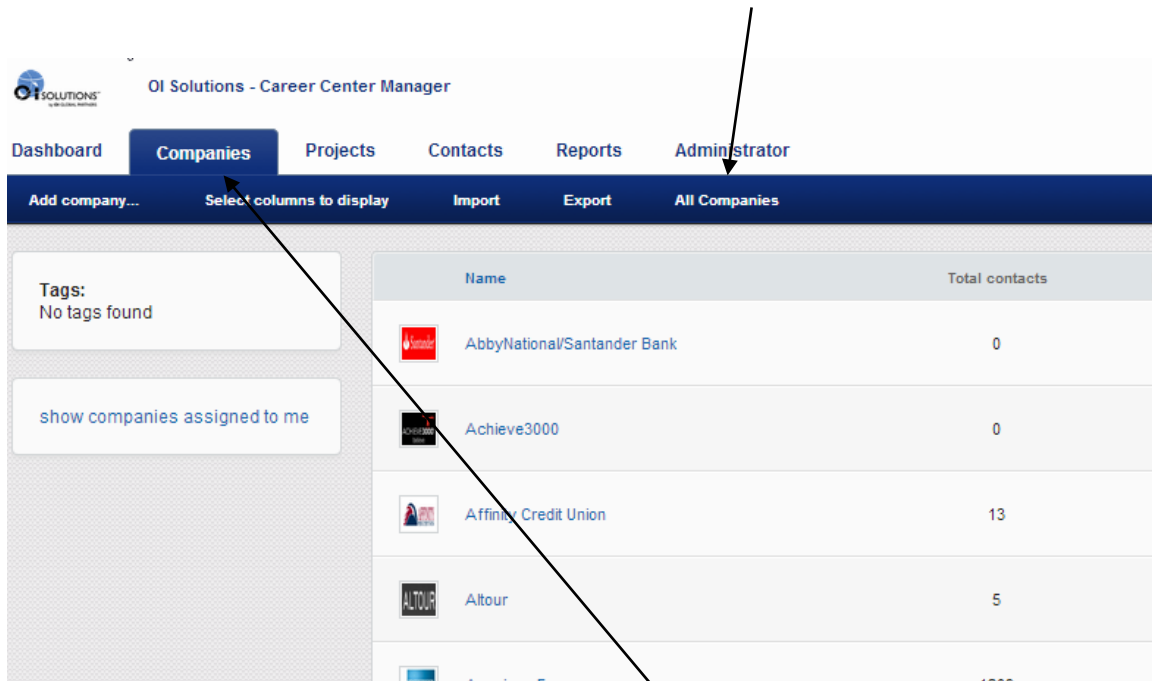
Go to the top right of the page

Click on CCM

Click on Company

You will see list of your firm's companies in the system

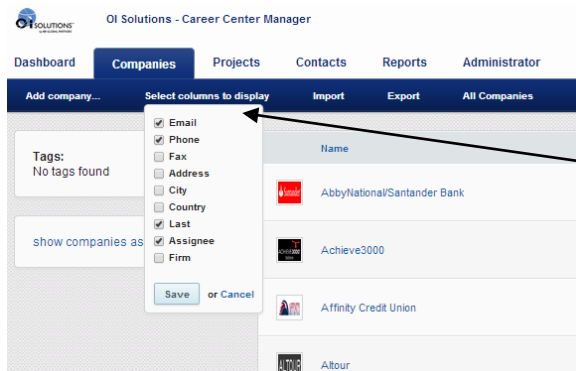
If you wish to see **other OIGP companies**, click on "All Companies"



*Long Visual Answer*

**Pick Companies tab to generate list and see submenu**

To add or subtract columns to display, Pick "Select columns to display"



Pick items you wish to see on your list.

Save...

This setup will stay until you change it again.

**To Add a Company – pick “Add a company” from submenu**

**Minimum Information**

Company Name  
 Assigned to (from list)  
 Firm (from list – your firm)  
 The information other firms will see is Name – Assigned to – Firm – If other fields are filled, they can't be seen

Suggest you put logo in for firm if you're going to give on-line access for reporting ... Logo on Customer page will feed from logo you put in to Customer Page

**To Edit a company, pick from list, and click on edit ... same fields as above**

## 18. How do I set up projects (programs) for a company?

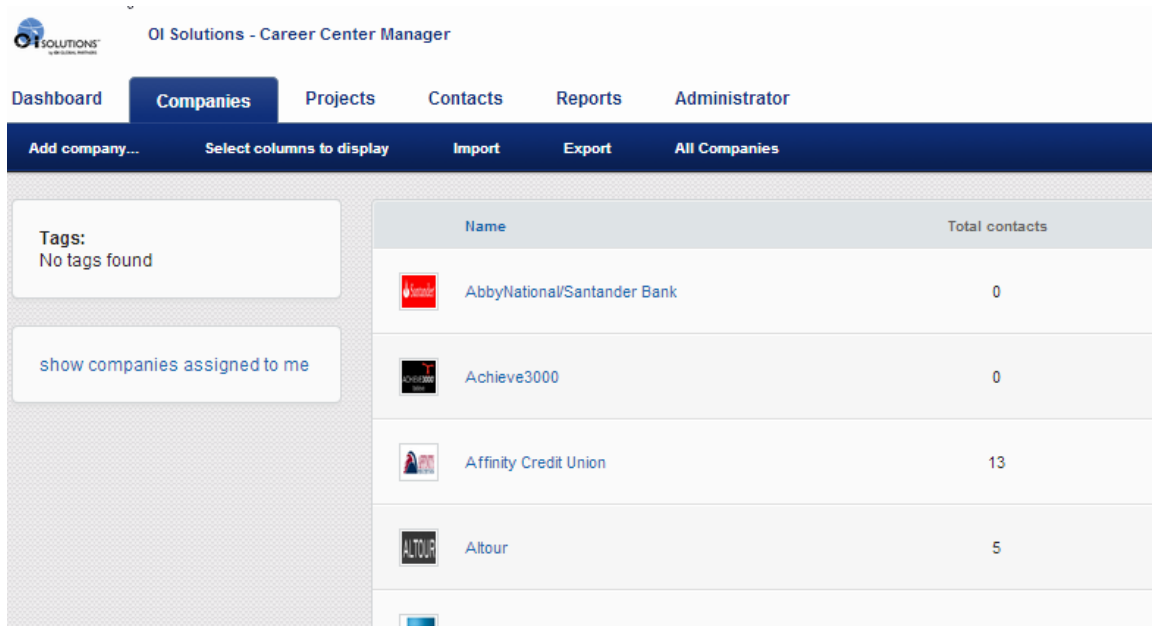
*Short Answer:*

Login to the OI Solutions website

Go to the top right of the page

Click on CCM

Click on Companies to generate a list or use the search box on right to find company.



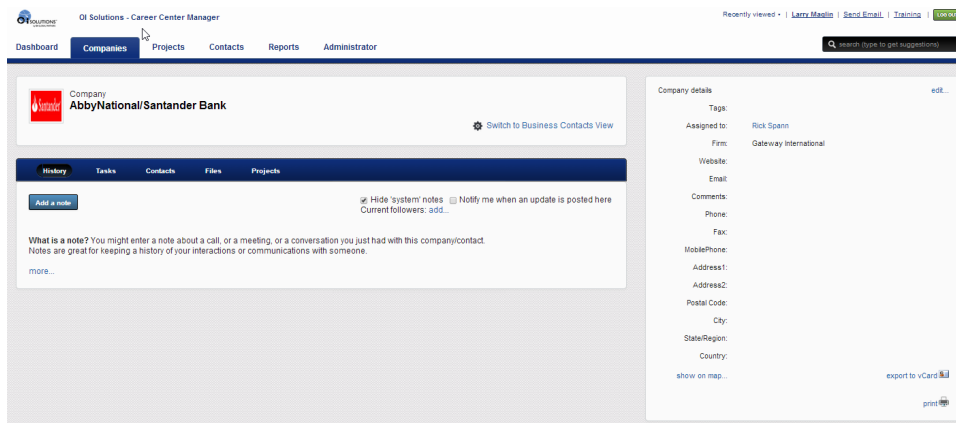
*Long Visual Answer*

Pick Companies tab to generate list and see submenu

Pick a company from list or from Search Box on right



Results in Company Page:



Pick "Projects" off submenu

The screenshot shows the OI Solutions - Career Center Manager interface. At the top, there is a navigation bar with the following items: Dashboard, Companies, Projects, Contacts, Reports, and Administrator. The 'Companies' tab is currently selected. Below the navigation bar, the main content area displays the company profile for 'AbbyNational/Santander Bank'. A submenu is visible below the company profile, with the 'Projects' option highlighted. An arrow points from the text 'Pick "Projects" off submenu' to the 'Projects' option in the submenu. Other options in the submenu include History, Tasks, Contacts, and Files. Below the submenu, 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'. A 'more...' link is also present.

Pick the Create a Project

The screenshot shows the OI Solutions - Career Center Manager interface, similar to the previous one. The navigation bar is the same. The 'Projects' tab is now selected in the submenu. Below the submenu, there is a section for 'Create a project...' with a button labeled 'Create a project...' and a button labeled 'Add to existing project...'. An arrow points from the text 'Pick the Create a Project' to the 'Create a project...' button. Below the buttons, there is a paragraph of text explaining what a project is: 'Projects - is something you do for your customers. For example, you're building a web-site for "Acme Motorcycles" for \$2000 - create a project named "New Website Design" with a value set to "\$2000", and attach any notes about the website to the project.' A 'more...' link is also present.

Project Box will come up... populate it

The Name field will come up in the drop-down after you pick a company, when you create new contacts in the Admin Area or Edit in the CCM under the contact page. Set your descriptions so they make sense if you are doing multiple programs for this company. The Name and Description will show up when you run single or multiple reports for this contact (CCM – Reports) and the Customer Landing page if used. You can create as many projects for a company as you want.

The screenshot shows a 'Project' form for the company '@AbbyNational/Santander Bank'. The form includes the following fields:

- \* Name:** SB 1 - Month Program
- Description:** 1 Month service- virtual delivery - 3 months OI Solutions - OIGP
- Tags:** (comma-separated)
- Project value:** 800, with a currency dropdown set to \$ - USD
- Assigned to:** Rick Spann
- Project Start Date:**
- Project End Date:**
- \* Firm:** Gateway International

A 'Save' button is located at the bottom left of the form.

This project will now also show up if you pick projects under this company.

The screenshot shows the 'Projects' tab in the interface for the company 'AbbyNational/Santander Bank'. The interface includes a navigation bar with 'History', 'Tasks', 'Contacts', 'Files', and 'Projects' (selected). Below the navigation bar, there are two buttons: 'Create a project...' and 'Add to existing project...'. A table shows the current project:

Already involved in projects:	
SB 1 - Month Program	800.00
<b>Total projects value:</b>	<b>800.00</b>

Below the table, there is a brief explanation of projects and a 'more...' link.

## To Delete a Project CCM – Projects You will see a list of all your projects...

Dashboard Companies **Projects** Contacts Reports Administrator

Filter by company: All Companies

Name	Total contacts	Last updated	Assigned to	<input type="checkbox"/>
2 day Seminar - on site	8	27 Jan 14: project created		<input type="checkbox"/>
3 month - Virtual Program	0	18 Oct 13: project created		<input type="checkbox"/>
6 month program - office based	2	06 Dec 13: project created	Jim Wilson	<input type="checkbox"/>
AFC 1 month - Blended	0	06 Dec 13: project created	Jim Wilson	<input type="checkbox"/>
AFC 3 month - Blended	0	06 Dec 13: project created	Jim Wilson	<input type="checkbox"/>
AFC 6 month - Blended	0	06 Dec 13: project created	Jim Wilson	<input type="checkbox"/>
ALT 1 month - Virtual	0	06 Dec 13: project created	Jim Wilson	<input type="checkbox"/>
ARC 1 month - Virtual	19	06 Dec 13: project created	Rick Spann	<input type="checkbox"/>
ARC 3 month - Blended	1	06 Dec 13: project created	Rick Spann	<input type="checkbox"/>

Pick the company from the filter to list those projects only  
Check off the Project you wish to delete

Filter by company: AbbyNational/Santander Bank

Name	Total contacts	Last updated	Assigned to	<input type="checkbox"/>
SB 1 - Month Program	0	18 Mar 14: project created	Rick Spann	<input type="checkbox"/>

Projects - is something you do for your customers

Click the icon to remove the project

## 19. How do I add / edit / delete a company?

### *Short Answer:*

Login to the OI Solutions website

Go to the top right of the page

Click on CCM

Click on Companies

Click on submenu “Add a company”

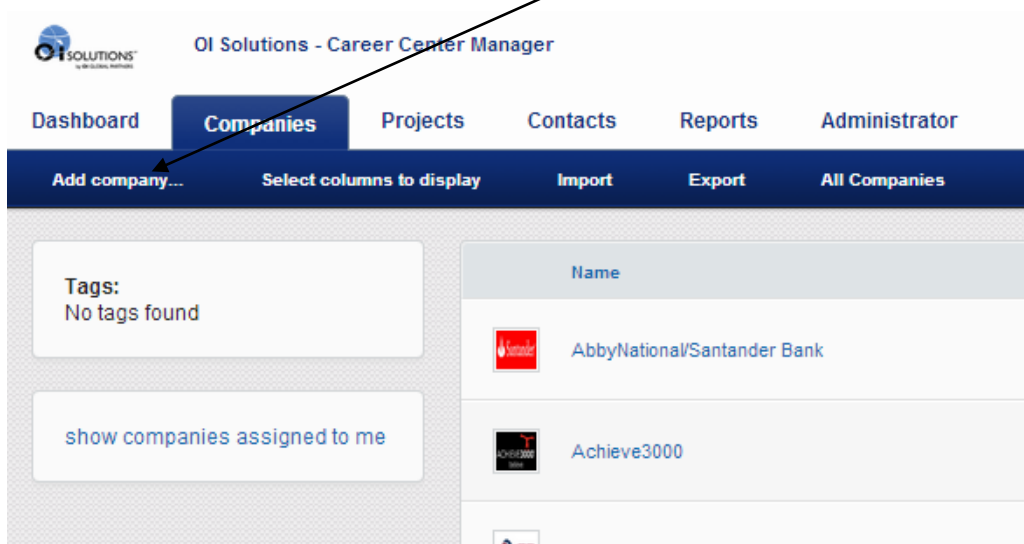
Fill out form and logo if needed (will pull from here for Customer Logo if available)

### *Long Visual Answer*

#### **To Add a Company**

CCM-Companies

Pick Companies and then sub-menu “Add a company”



Fill in profile for company with at least:

Company Name

Assigned to = Person responsible for account

Country located in:

Firm: (You only can pick yours)

Logo: If you are going to give online access to customers, put company logo here as customer landing page will pull from this logo for that page

Populate and Save

Company

\* Company name:

Tags: (comma-separated)

Assigned to:

Email:

Website:

Phone:

Mobile Phone:

Fax:

Address1:

Address2:

City:

State/Region:


Country:

Postal Code:

\* Firm:

Comments:

Company Image

 picture file, max 1mb  
(leave blank to reset)

No file chosen

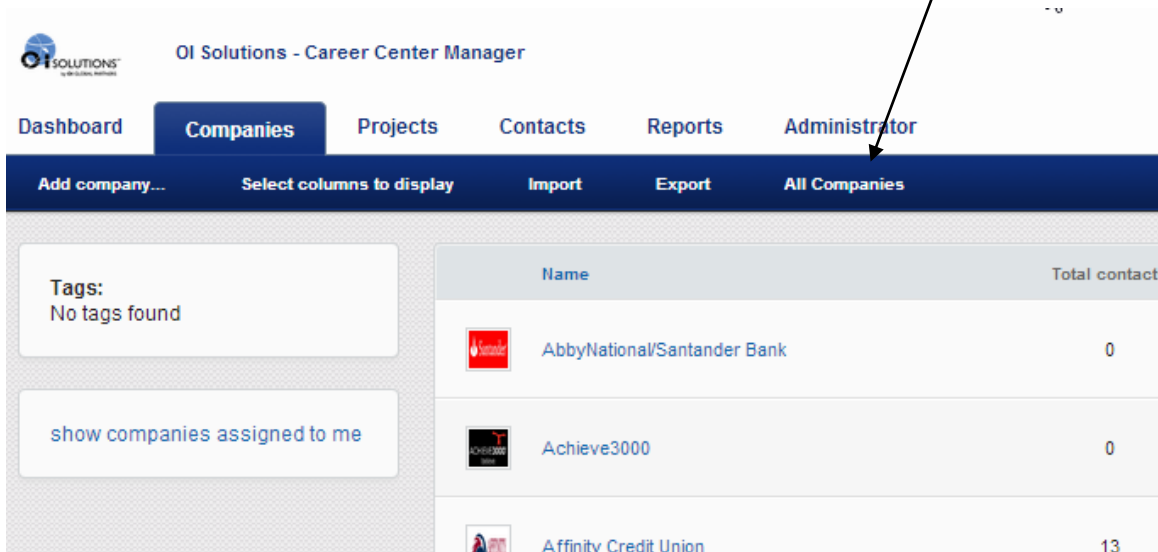
Company will now show up on your Companies list

 Enterprise Starships	0	18 Mar 14: company created	Larry Maglin	<input type="checkbox"/>
--	---	----------------------------	--------------	--------------------------

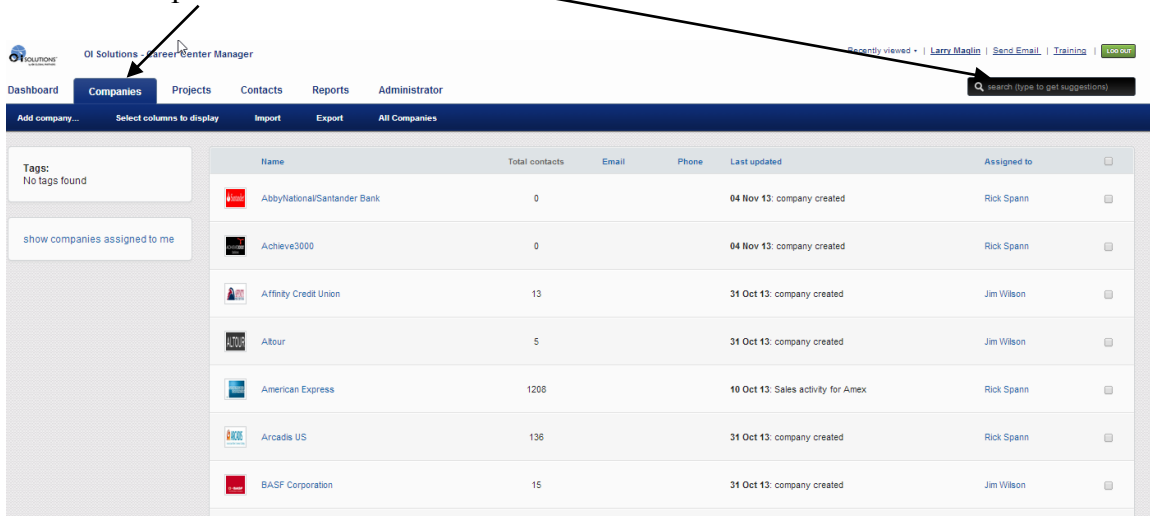
Will also show up as item drop-down when creating new contact (Admin Area - Create contacts) and you can now add projects (programs) to this company if you wish.



It will also show up under “All Companies” which is available to any Firm Administrator or Business Developer under the CCM-Companies-sub-menu “All Companies”



To Edit Company entry:  
CCM – Companies or Search Box



Find the company you wish to edit, pick the company

You will be taken to the Company contact page ... click on edit

The screenshot shows the 'Company' page for 'AbbyNational/Santander Bank'. The interface includes a navigation bar with 'Companies', 'Projects', 'Contacts', 'Reports', and 'Administrator'. A search bar is located in the top right. The main content area is divided into a left sidebar with 'History', 'Tasks', 'Contacts', 'Files', and 'Projects' tabs, and a right sidebar titled 'Company details' containing fields like 'Assigned to', 'Firm', 'Website', 'Email', 'Comments', 'Phone', 'Fax', 'MobilePhone', 'Address1', 'Address2', 'Postal Code', 'City', 'State/Region', and 'Country'. An 'edit...' link is visible in the top right corner of the 'Company details' panel, indicated by an arrow from the text above.

You will be back in the company profile and can make changes and save

**To Delete a Company** (CCM – Companies – generate a list of companies)

Check off companies you wish to delete

And click on delete at bottom of page

	Evonic	3	31 Oct 13: company created	Debbie Wilson	<input type="checkbox"/>
	First Advantage	200	20 Dec 13: company created	Rick Spann	<input type="checkbox"/>
	ICAP	150	04 Oct 13: company created	Rick Spann	<input type="checkbox"/>
	Janney Montgomery Scott	24	31 Oct 13: company created	Elna Jenkins	<input type="checkbox"/>
1 2					send email...   delete...

Arrows from the text above point to the checkboxes in the rightmost column and the 'delete...' link at the bottom of the table.

## 20. Where do I find HELP in OI Solutions?

*Short Answer:*

Login to the OI Solutions website

Go to the top right of the page

Click on Admin Area

Click on “search for help”

*Long Visual Answer*

### To Access the Landing page of HELP information

Click on “search for help”

The screenshot displays the OI Solutions Administrator interface. At the top left is the logo for OI GLOBAL PARTNERS Gateway International. The top right navigation bar includes links for CCM Login, Admin Area, My Profile, FAQs, and Logout. Below this is a blue navigation menu with options: My Dashboard, My Career, Research, Resources, and Webinars. The main heading is 'Administrator' with a 'Download User Guide' link on the right. A welcome message states: 'Welcome, here you can learn about accounts, manage account details, keep up to date with the latest upgrades, [search for help](#) and [contact support](#).' An arrow points from the text 'Click on “search for help”' to the 'search for help' link in the welcome message. The dashboard features a grid of functional buttons: Create Contacts, Set Goals, Find Contacts, Manage Jobs, System Messages, Custom Pages, Theme Manager, Manage Tutorials, Manage News, and CCM Login. On the right side, there is a video player with a thumbnail of a head containing question marks, and an 'Admin Centre' sidebar listing administrative tasks such as 'Admin: Create Single Contact in CC & CCM', 'Admin: Referring Contacts', 'Admin: Theme Manager Training', and 'Admin: Setting System Messages'. A 'Need help? Access support here: [Feedback & support](#)' link is located at the bottom right.

## KNOWLEDGE BASE... HOW TO TOPICS

You will be able to search the Knowledge Base or other information that describes how to do various operations within the Admin Area or CCM. You will also be able to:

Contact support

Give feedback

And view the Knowledge Base

**abintegro**

Knowledge Base  
— Customer Feedback for Abintegro

New and returning users may [sign in](#)

**Administering User Details** →

- Change a user's password
- Change user's first / last name
- Creating Administrator Accounts
- Creating new user accounts
- Deleting users
- 12 articles →

**Engaging Users** →

- How to introduce the Careers Centre to my users
- Improving the number of users accessing the Career Centre
- Increase engagement with Career Week
- Saving job searches and automatic job alerts

**Groups** →

- Adding multiple users into Career Centre Groups

**Learning Modules** →

- Are the blue check marks in the learning modules links?

**Career Centre Manager (CCM)** →

- Creating Contacts in the CCM
- What is the Career Centre Manager (CCM)
- Who uses the CCM?
- Assigning contacts to projects within the CCM
- Viewing Career Centre activity in the CCM
- 9 articles →

**General Help** →

- What Internet browsers do you support?

**Job Search Engine** →

- Can I filter company location in the Job Search Engine
- If someone sees a job advertised, are they able to upload their CV directly?
- Job Search Tips
- Which sites / sources does the job search section pull its jobs in from e.g. Monster Jobs etc?
- The job search links wont open

**Reports** →

- Filter Activity Reports by User(s)
- Run User Activity Reports

**Need a free ticketing system & knowledge base?**

Search

**Contact support**

**Give feedback**

**Knowledge Base**

- Administering User Details 12
- Career Centre Manager (CCM) 9
- Engaging Users 4
- General Help 1
- Groups 1
- Job Search Engine 5
- Learning Modules 1
- Reports 2
- Tutorials 1
- User Access 3
- Videos 1
- Action Planner 1
- Alert Data 1
- Upgrades 2
- Third Party Services 3
- Languages 1
- All articles

**Abintegro**

## CONTACT SUPPORT

If you click on contact support from the top or the bottom of the Admin Page

The screenshot shows the top navigation bar of the Admin Page. On the left is the Gateway International logo with the tagline 'leading change for organisations & individuals'. On the right are links for 'CCM Login', 'Admin Area', 'My Profile', 'FAQs', and 'Logout'. Below this is a blue navigation bar with 'Dashboard', 'My Career', 'Research', 'Resources', and 'Webinars'. The main content area is titled 'Administrator' and includes a 'Download User Guide' link. A welcome message says 'Welcome, here you can learn about accounts, manage account details, keep up to date with the latest upgrades, [search for help](#) and [contact support](#).' Below are several buttons: 'Create Contacts', 'Set Goals', and 'CCM Login'. On the right, there are two video thumbnails: 'Getting the most from the i-name manager' and 'Admin: Setting System Messages'. At the bottom right, there is a 'Need help? Access support here:' link with a 'Contact Support' button.

You will be able to search on the Knowledge Base “browse articles” or start an email to the support team at Abintegro

The screenshot shows the Knowledge Base and Contact Support interface. On the left is the 'Knowledge Base' section with a 'browse articles' link. It lists several articles: 'CV Builder & Job Search in Safari on MAC or i...', 'Job Search Tips', 'Run User Activity Reports', and 'Logging into the Career Centre'. Below this is the 'Feedback' section with a 'browse ideas' link, listing ideas like 'Report on users goal completion status', 'Add "to present" to CV date options', 'Add email search for users in the Edit Users a...', and 'Allow administrators to change a user's ID'. On the right is the 'Contact support' form, which includes a 'Give feedback' link, a 'Message subject' field, a 'How can we help you today?' text area, an 'Attach a File' button, a 'Your email address' field, and a 'Send message' button. The footer indicates 'powered by uservoice'.

## HOW TO VIDEOS

There are many HOW TO videos on a number of system functions on the Admin Page

The screenshot displays the Administrator interface for OI Global Partners Gateway International. At the top, there is a navigation bar with links for CCM Login, Admin Area, My Profile, FAQs, and Logout. Below this is a secondary menu with My Dashboard, My Career, Research, Resources, and Webinars. The main content area is titled 'Administrator' and includes a 'Download User Guide' link. A welcome message states: 'Welcome, here you can learn about accounts, manage account details, keep up to date with the latest upgrades, [search for help](#) and [contact support](#).' The dashboard features a grid of buttons for various functions: Create Contacts, Set Goals, Find Contacts, Manage Jobs, System Messages, Custom Pages, Theme Manager, Manage Tutorials, Manage News, and CCM Login. On the right side, there is a video player showing a video titled 'Admin: Create Single Contact in CC & CCM' with a duration of 05:10. Below the video player is a list of other 'Admin: How To' videos, including 'Admin: Referring Contacts', 'Admin: Theme Manager Training', and 'Admin: Setting System Messages'. A 'Need help? Access support here: [Feedback & support](#)' link is located at the bottom right of the dashboard.

# FRONT END: QUESTIONS FOR CANDIDATES/COACHES - FAQs

More help around the job search process and using the system's front end

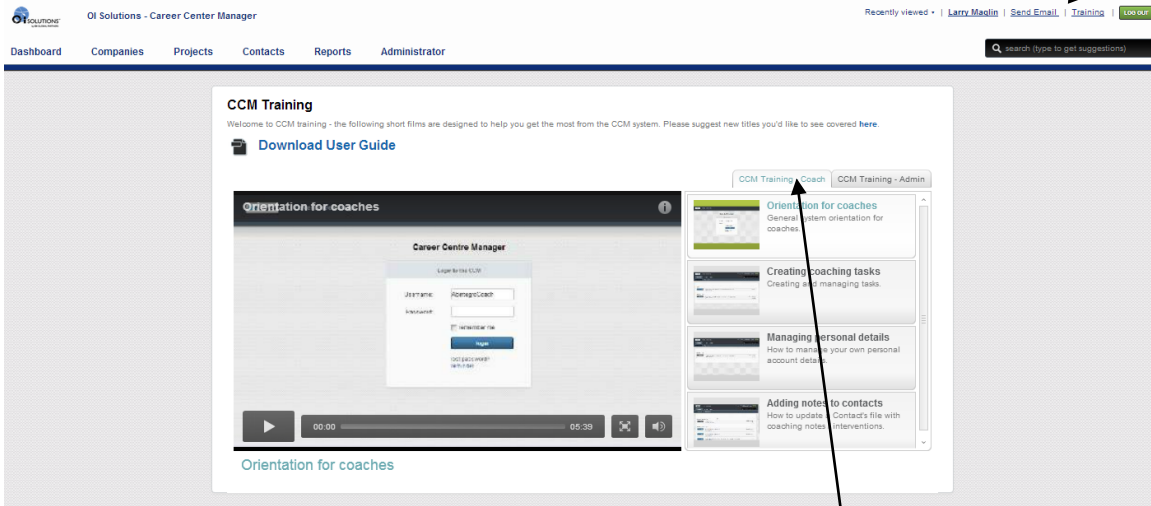
## Help & FAQs

### Frequently Asked Questions

- Will this site work on mobile devices?
- Does the CV Builder save to my PC or the web?
- What internet browser should I use?
- Can the CV Builder handle multiple versions of my CV?

# CCM HELP

CCM Training is in top right-hand part of screen



You may download a User Guide and look at CCM topics, tab for coaches and a tab for Administrators with administrator topics

