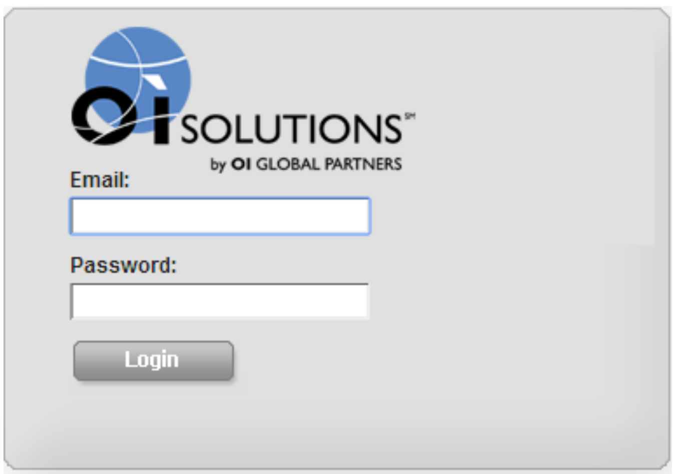
FAQ's for Firm Administrators

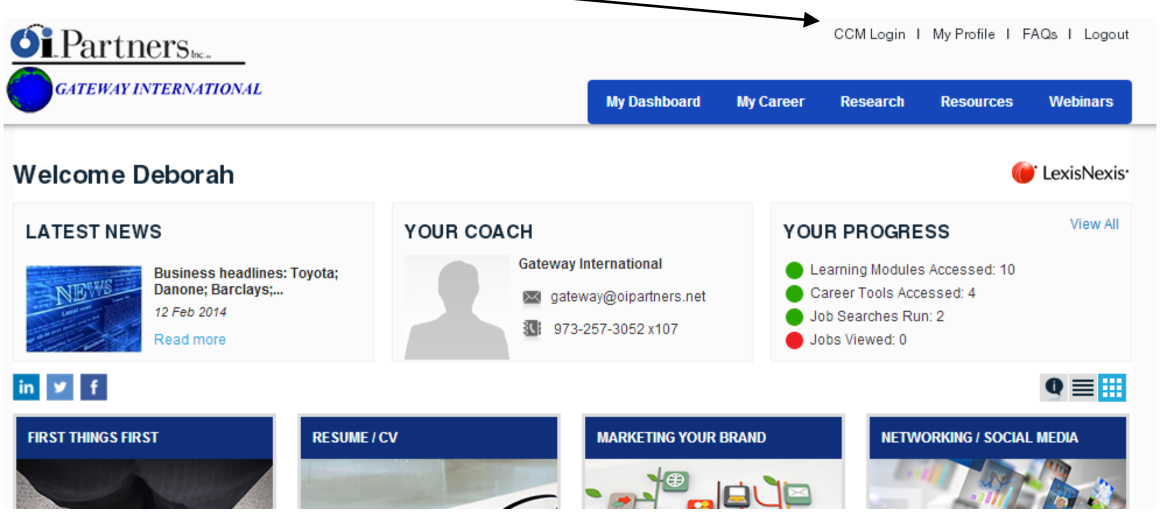
1. How do I login to the Career Center Manager (CCM)?

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



Go to the top right of the page
Click on CCM Login



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)

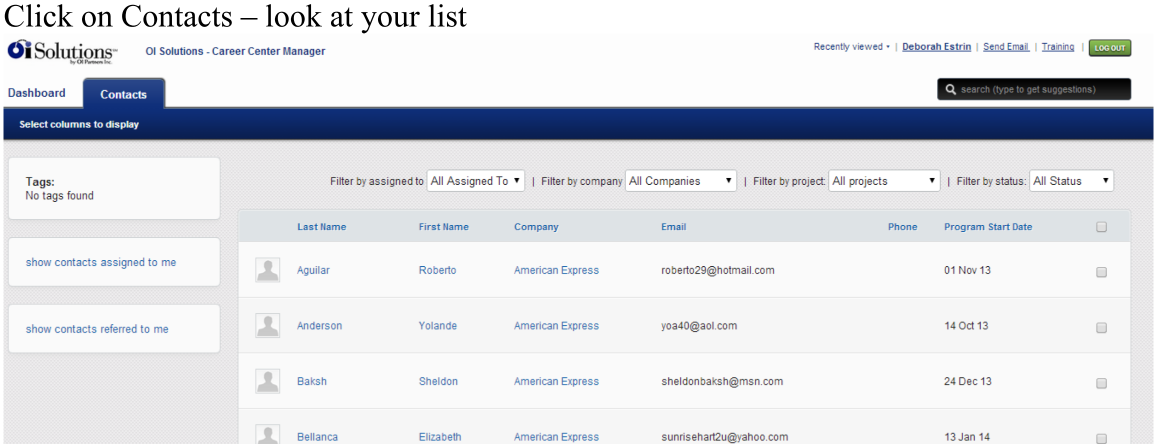
Short Answer:
Login to the OI Solutions website
Go to the top right of the page
Click on CCM Login

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

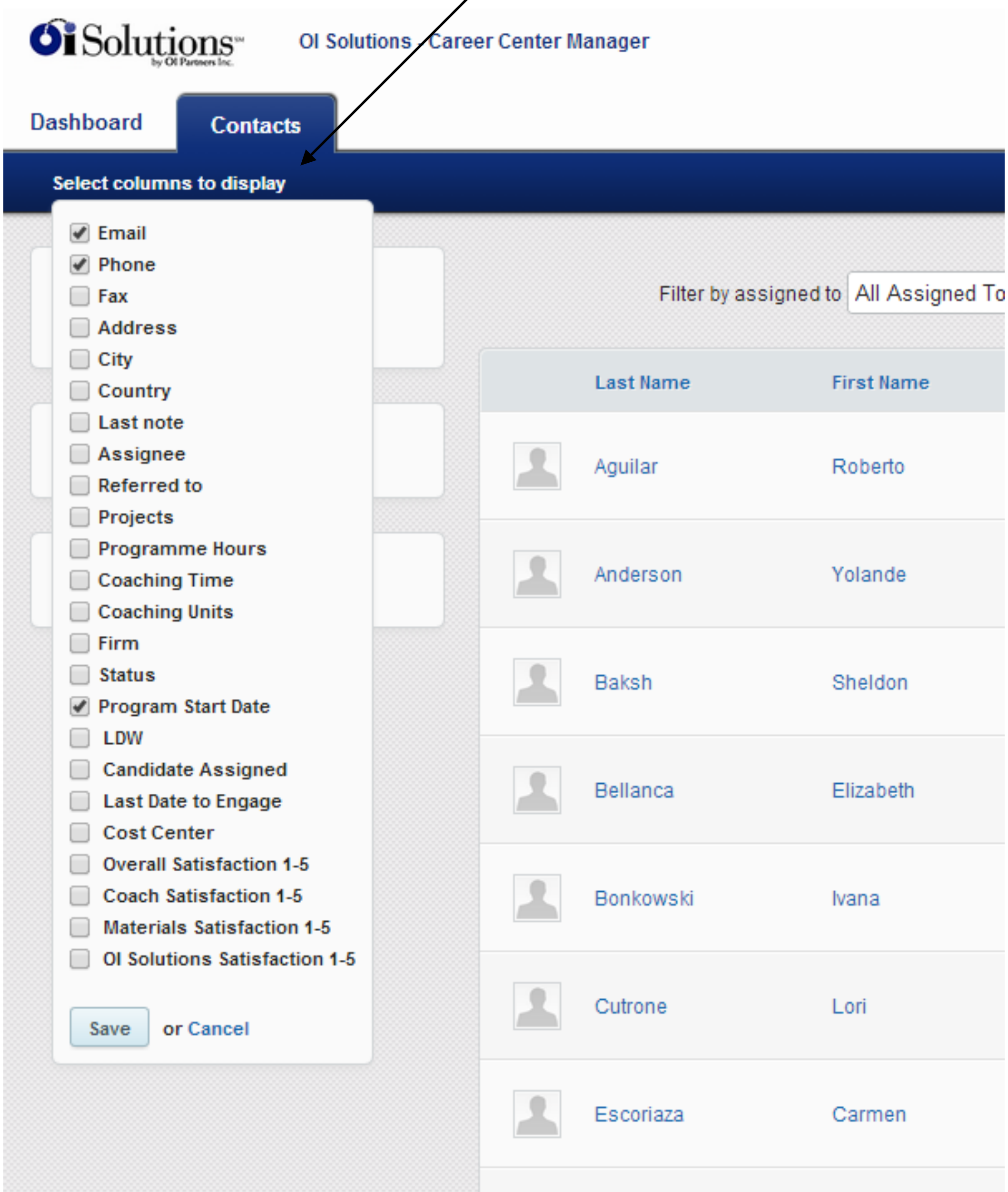
Method 2
Start typing last name of candidate in search box at top right
System will display list of names that match
Pick your contact off list

Long Visual Answer:
Login to the OI Solutions website
Go to the top right of the page
Click on CCM Login

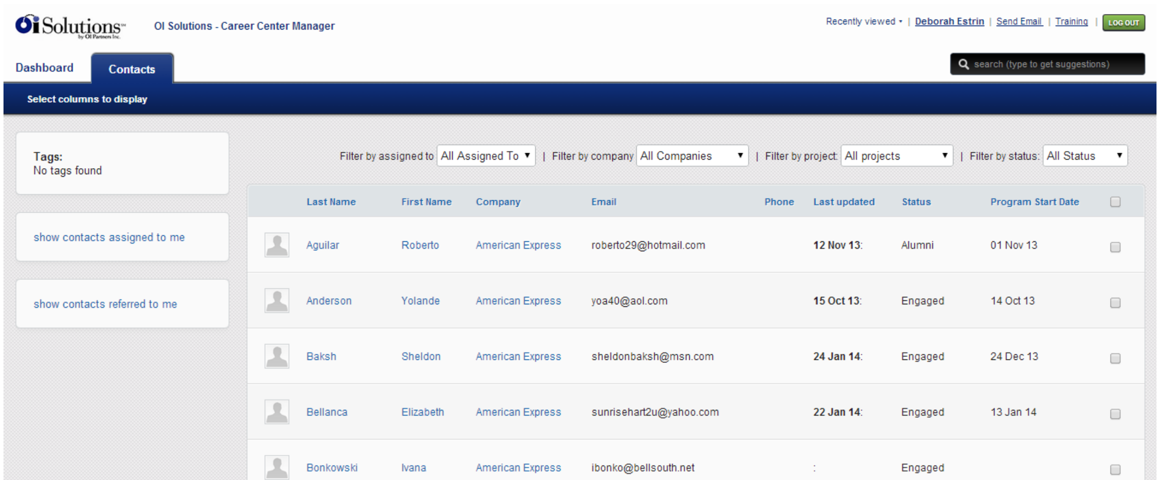
Method 1
Click on Contacts – look at your list



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.



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

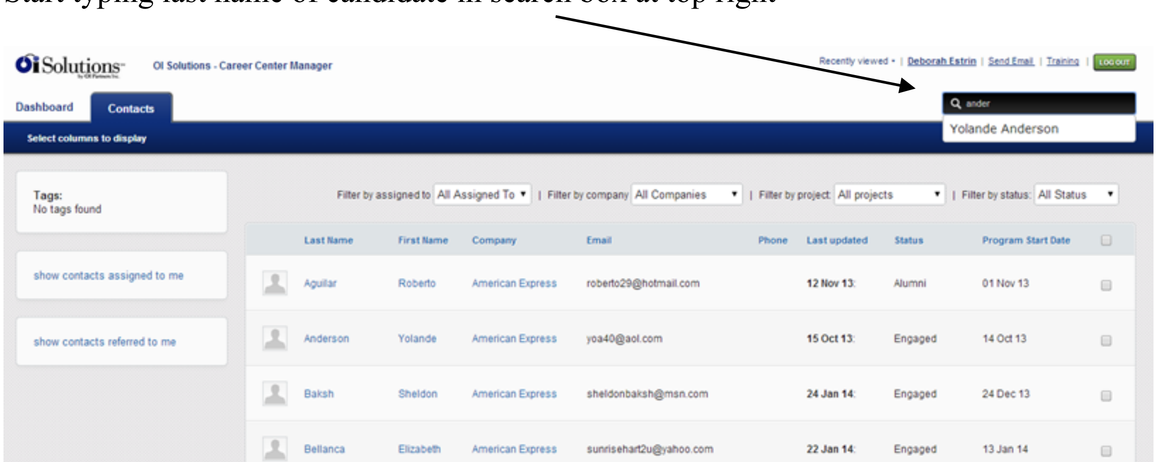


You can sort the columns by clicking on any column header and/or use the filters at the top

Find your client

Method 2

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



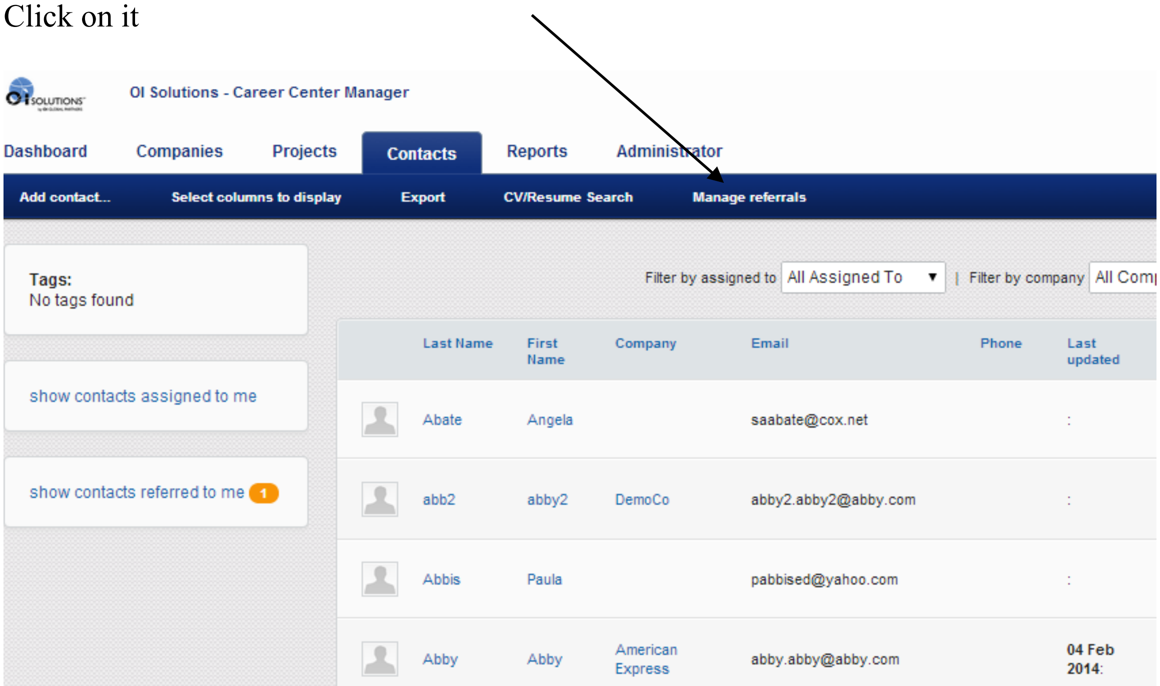
System will display list of names that match

Pick your contact off list

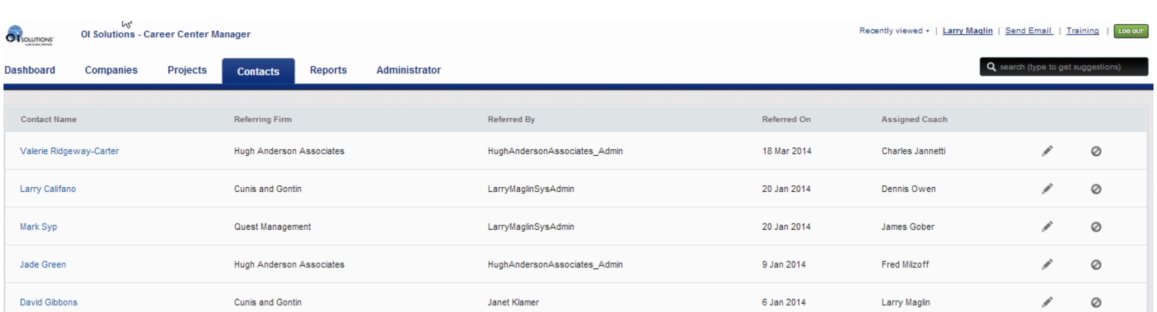
3. How do I find my candidates who are referred by an OI Global Partner?

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”

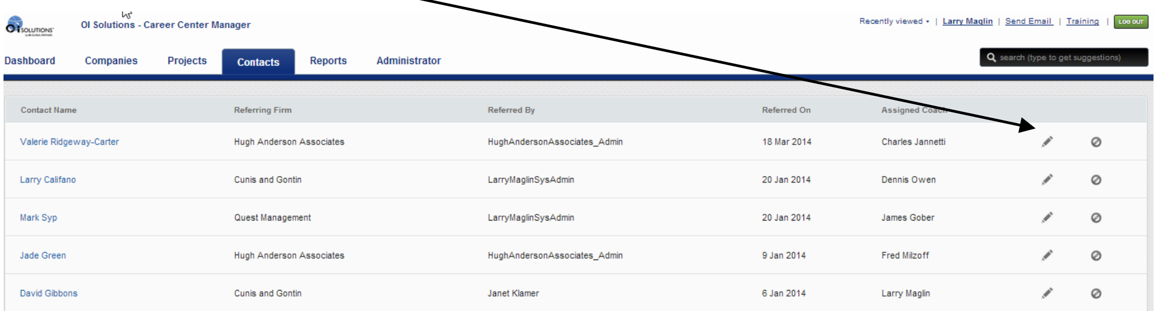
Long Visual Answer:
Login to the OI Solutions website
Go to the top right of the page
Click on CCM Login
Click on Contacts
Click on Contacts – submenu: “Manage referrals”
Click on it



It will show you candidates who have been referred to you



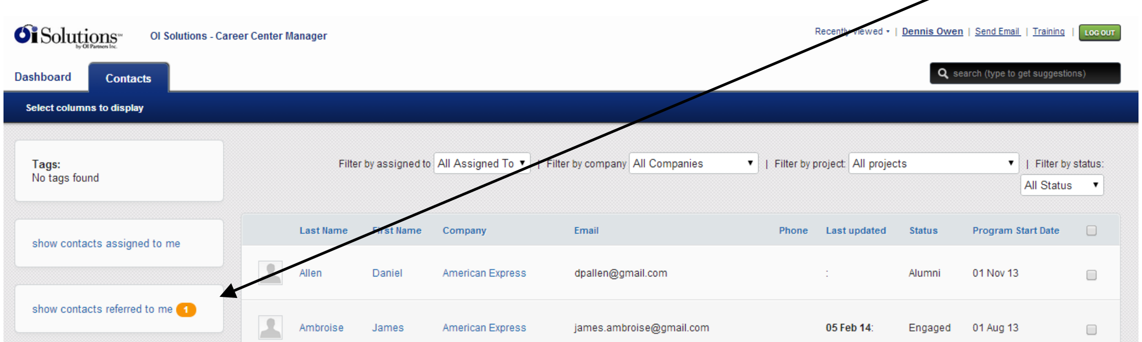
The newly referred case will have no entry in the “Assigned Coach” until you click on the pencil icon and pull down the list of coaches to assign to. After you have picked the coach… click on the ✓to finish the entry.



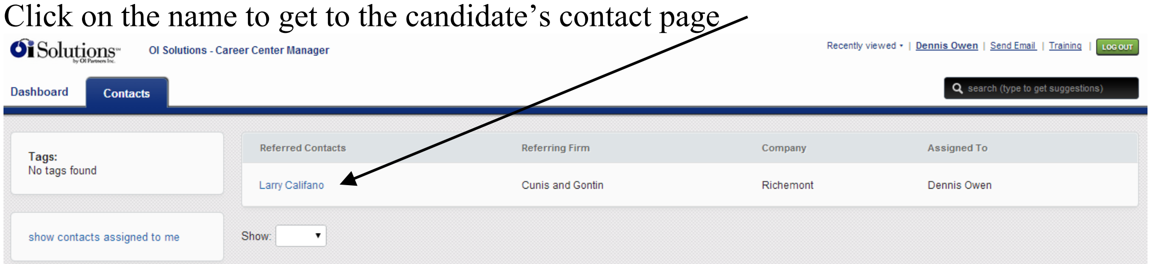
The assigned coach will now have this contact (candidate) in their portal. They can find the new contact (candidate) two ways ….

<u>Method 1</u>

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

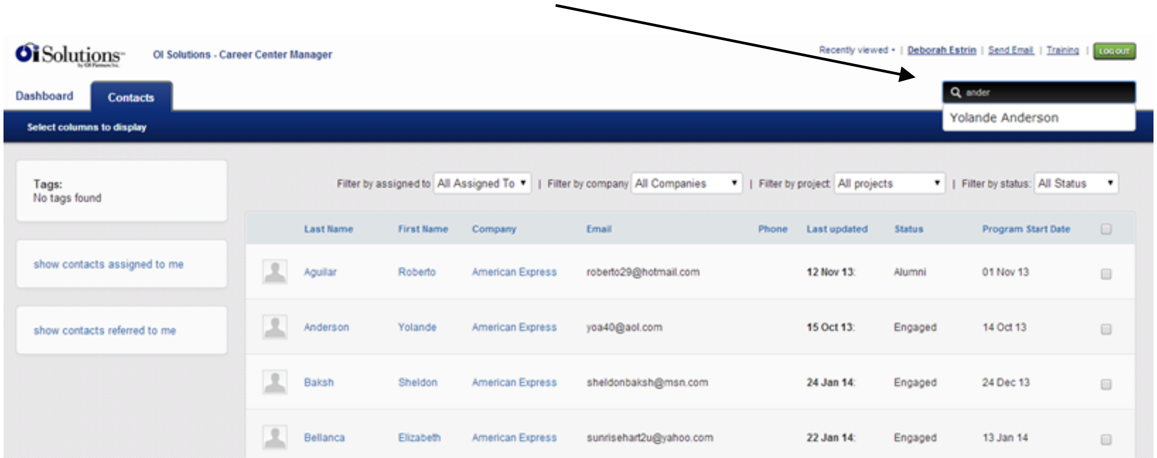


It will show you your referred candidates
Click on the name to get to the candidate’s contact page



Method 2

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



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”

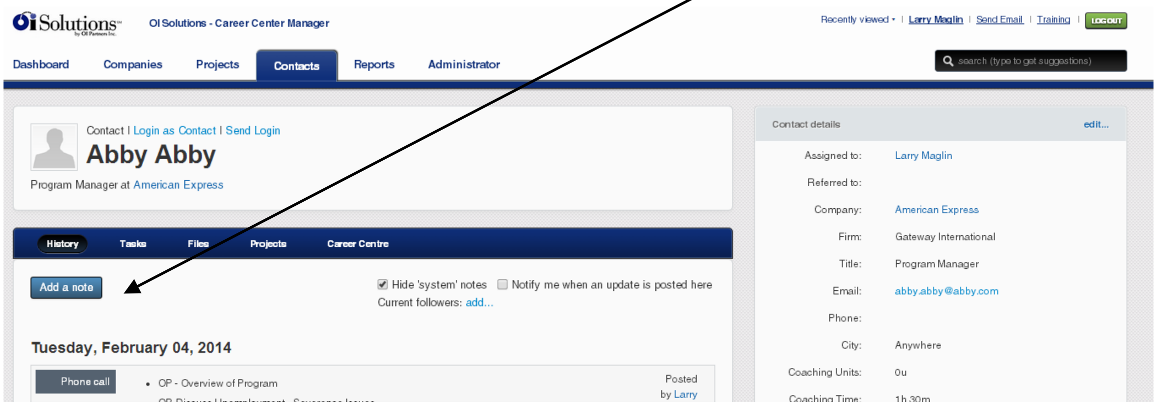
Method 2

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”

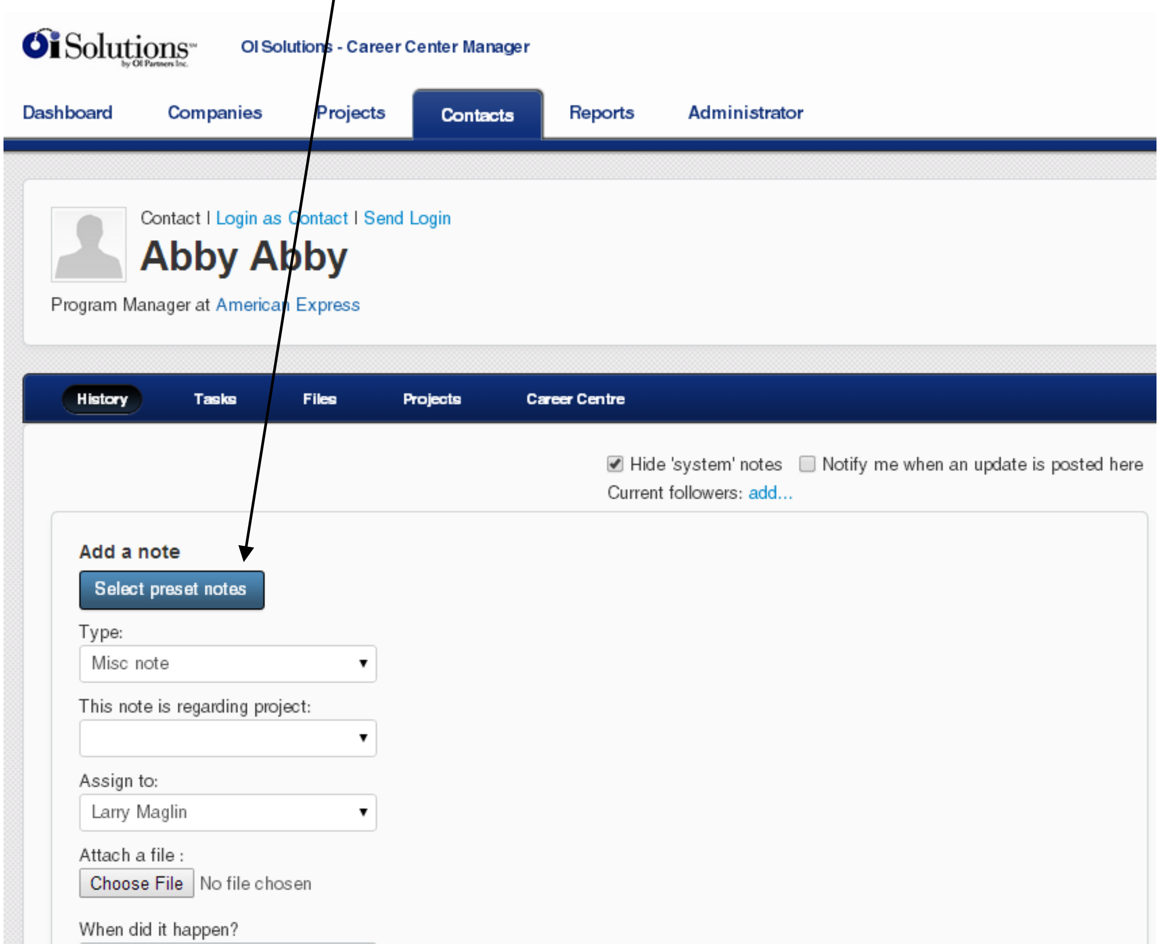
Long Visual Answer: Assumes you can get to the contact page from above

Long Visual Answer:

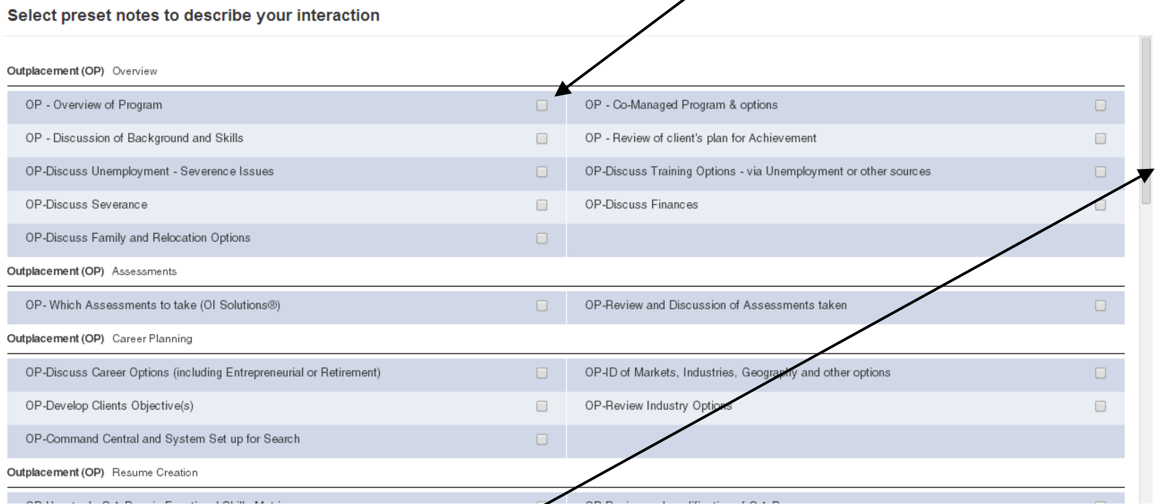
Click on “Add Note” on left side under Name of Contact



Click on “Select preset notes”

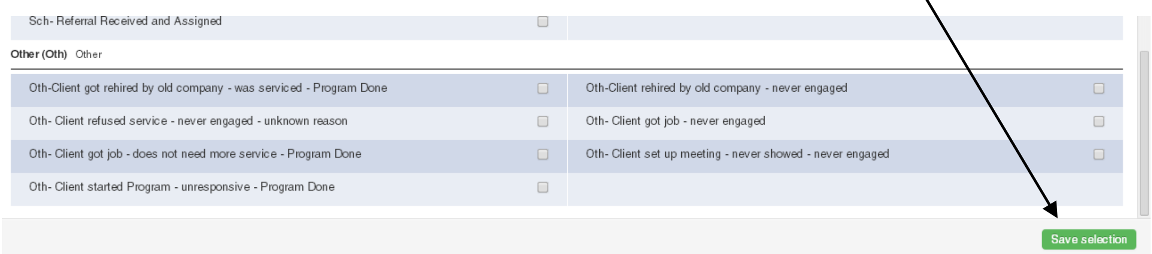


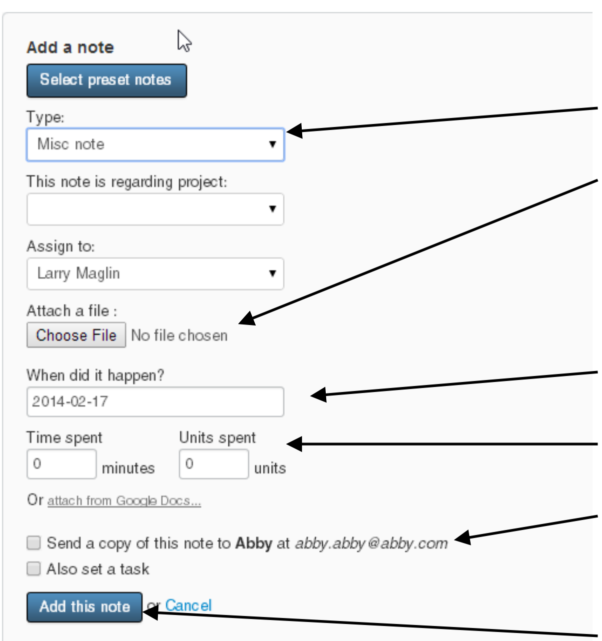
Check off all relevant items associated with this meeting…



Use scroll bar to see more entries

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





You are then brought back to the Add a note screen

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

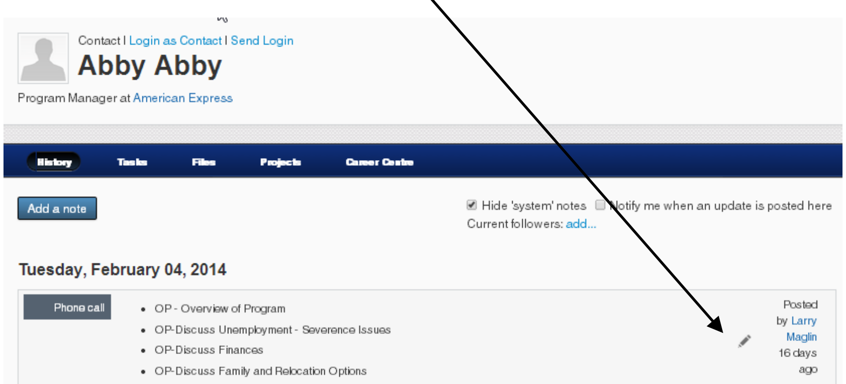
Click on Contacts –
Add columns to your list to help you search by picking “Select columns to display” on the submenu
Find and click on your contact
Go to the note to edit, click on the pencil icon and it will allow you to add, change presets, change date, type or delete

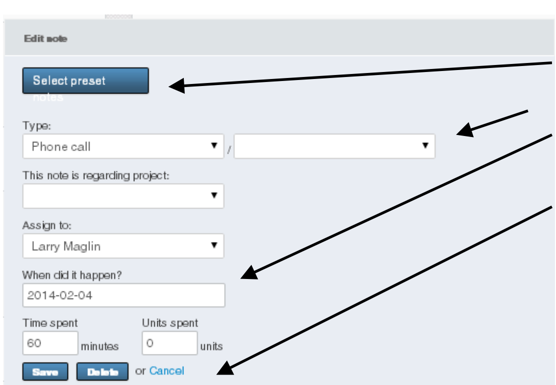
Method 2

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?

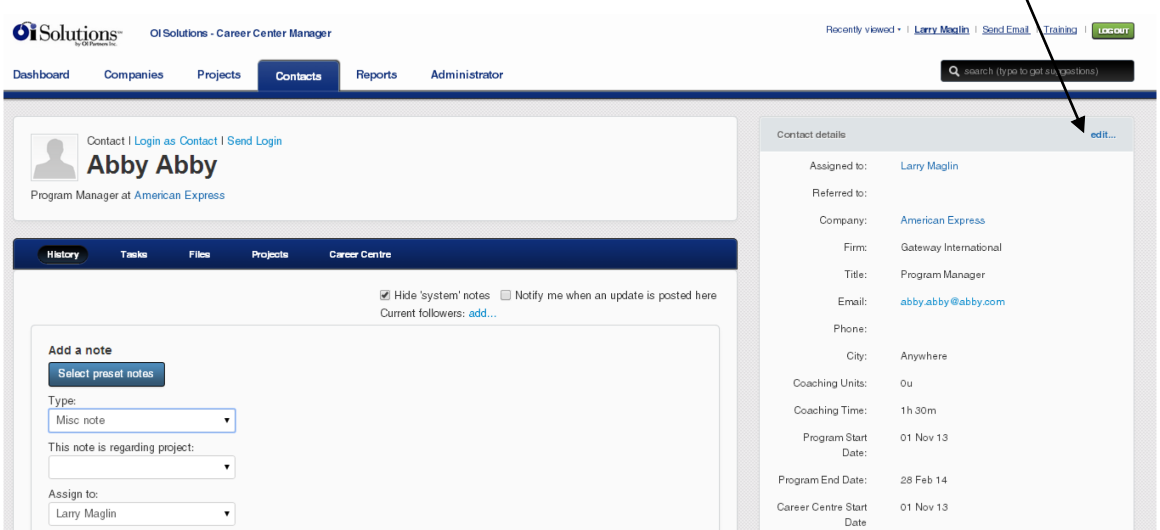
Short Answer:
Login to the OI Solutions website
Go to the top right of the page
Click on CCM Login

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

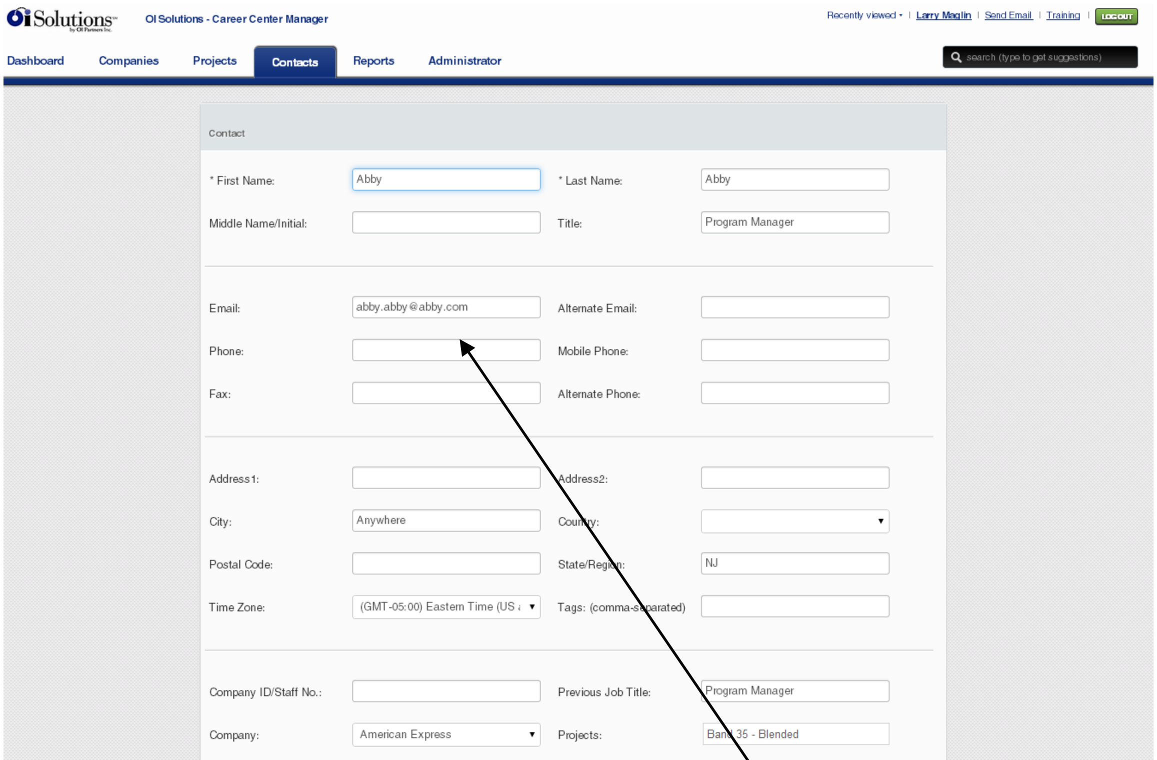
Method 2
Start typing last name of candidate in search box at top right
System will display list of names that match
Pick your contact off list
On top right hand of Contact info on the extreme right-hand side… Click edit

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

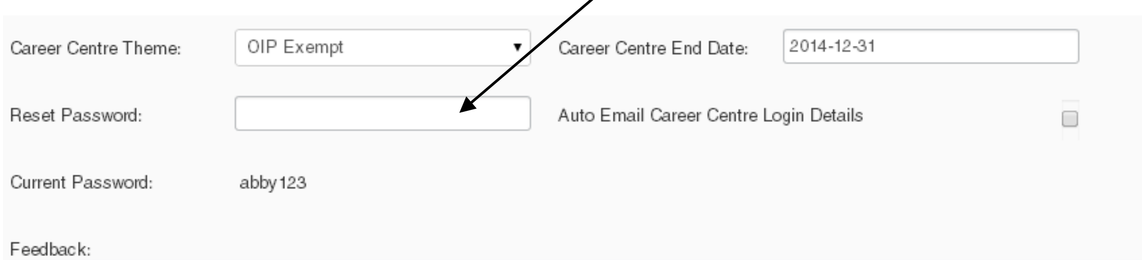


This will open the Contact's information …



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

You can also reset the password for the Contact.



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

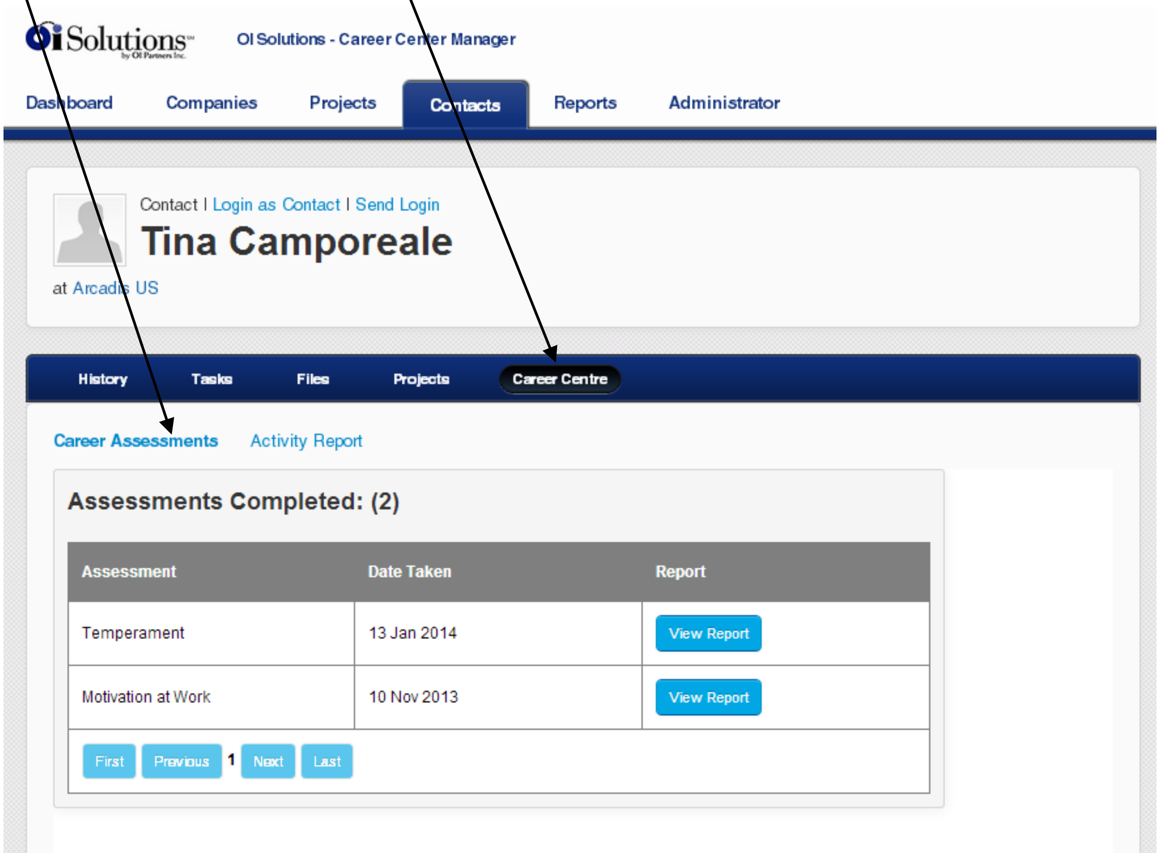
Click on Contacts –
Add columns to your list to help you search by picking "Select columns to display" on the submenu
Find and click on your contact
Underneath the Name, go to the blue submenu "History – Tasks – Files – Projects – Career Center"
Click on "Career Center"
Click on Career Assessments… If 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



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

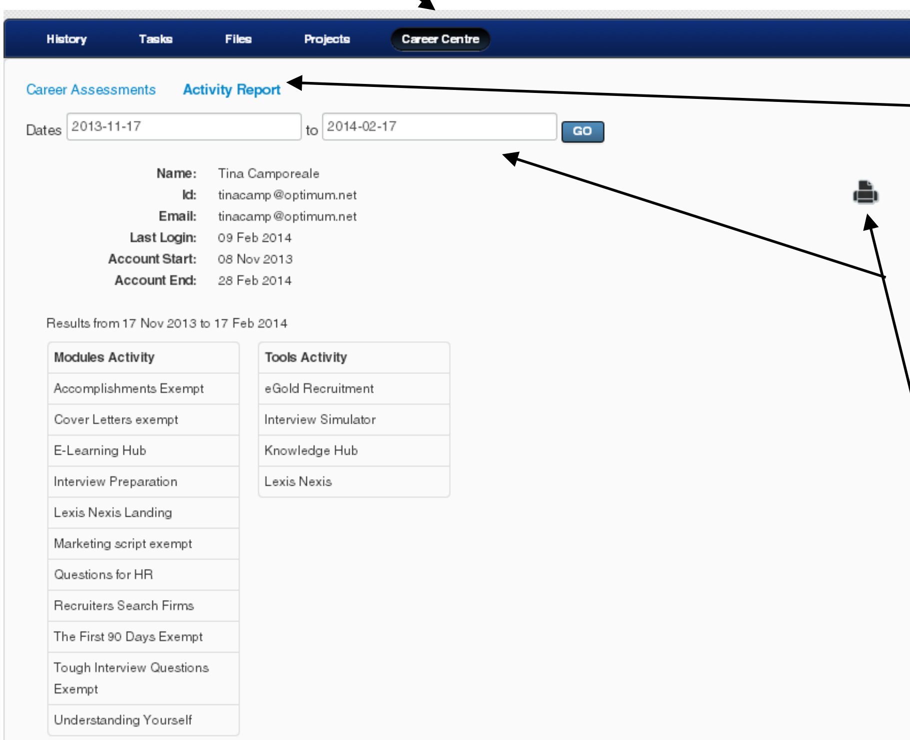
Click on Contacts –
Add columns to your list to help you search by picking "Select columns to display" on the submenu
Find and click on your contact
Underneath the Name, go to the blue submenu "History – Tasks – Files – Projects – Career Center"
Click on "Career Center"
Click on Activity Report
Input 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"



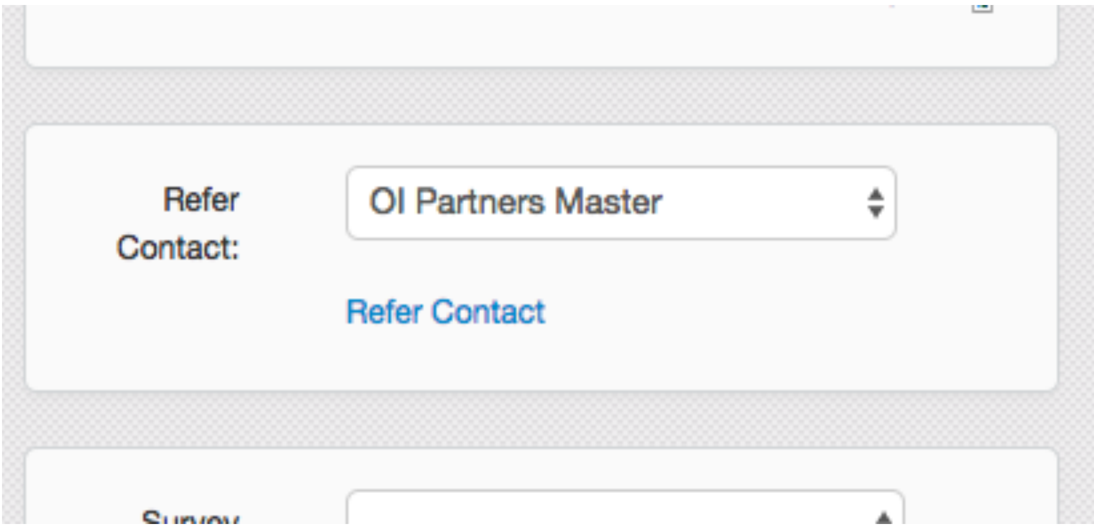
Click on Activity Report

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?

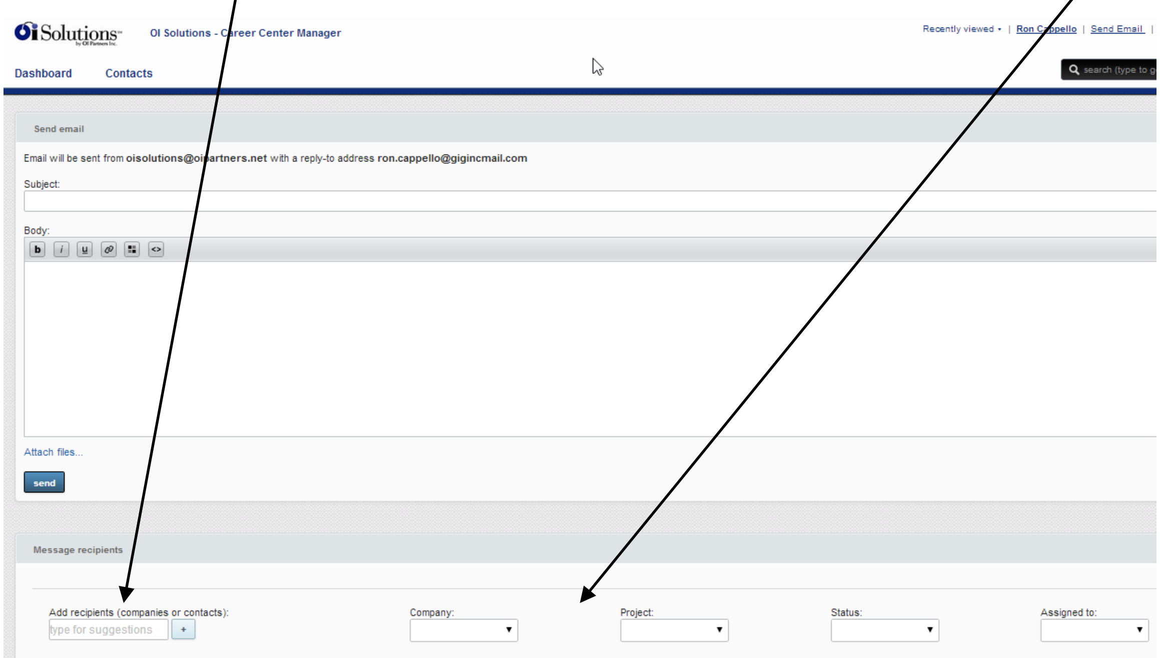
Short Answer:
Login to the OI Solutions website
Go to the top right of the page
Click on CCM Login

Method 1
Go to top right on page
Click Send email

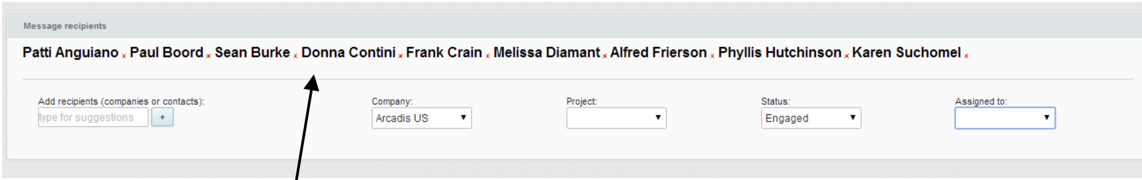
Long Visual Answer

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.



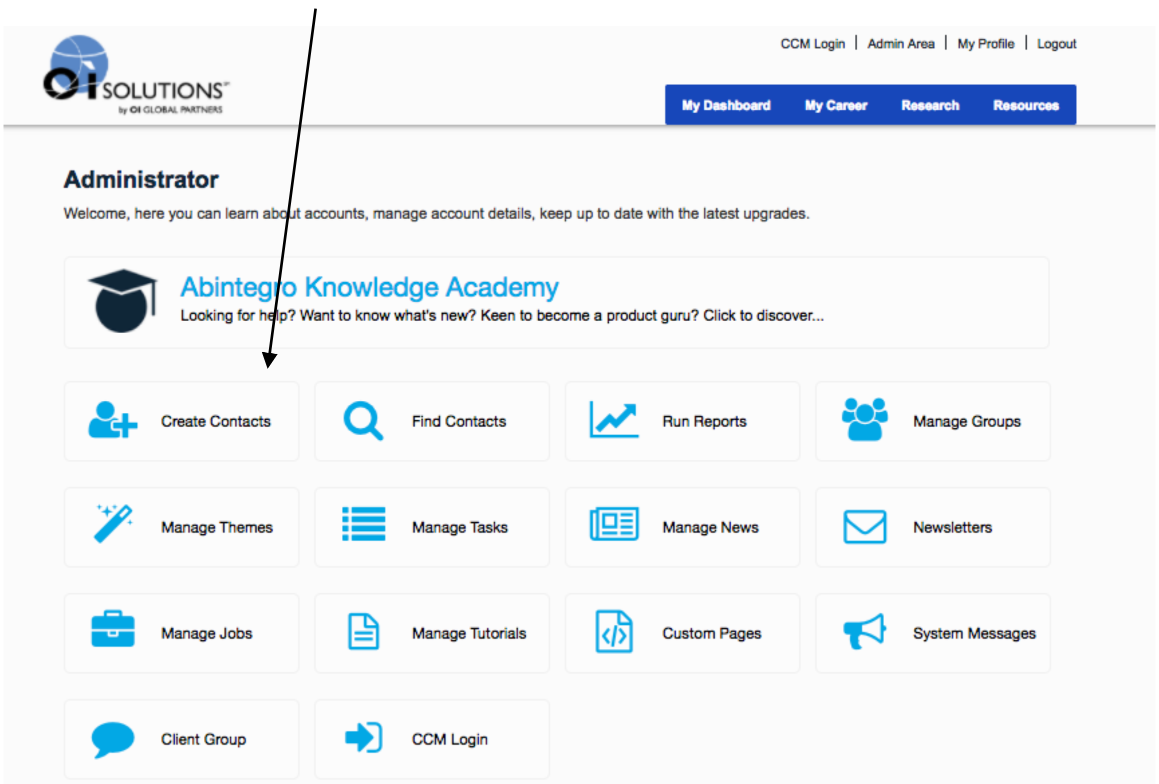
I have picked a company and status and the system auto populates the recipients the email can be sent to.

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

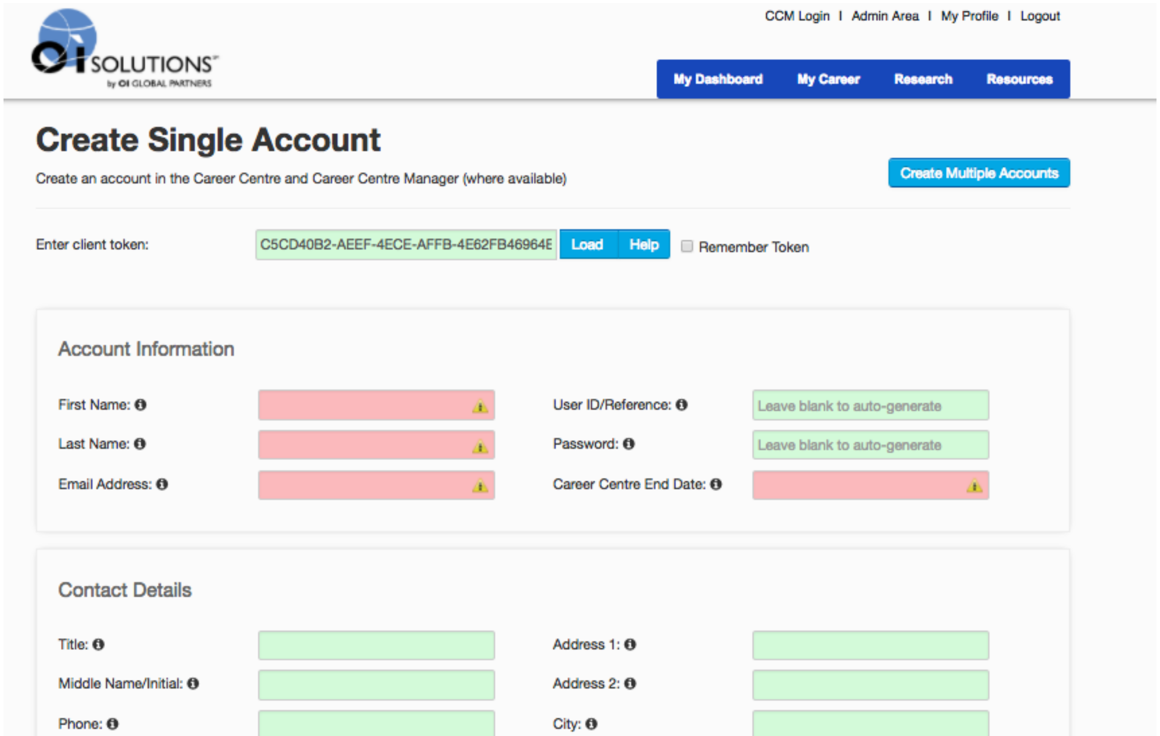
11. How do I create a single new contact?

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

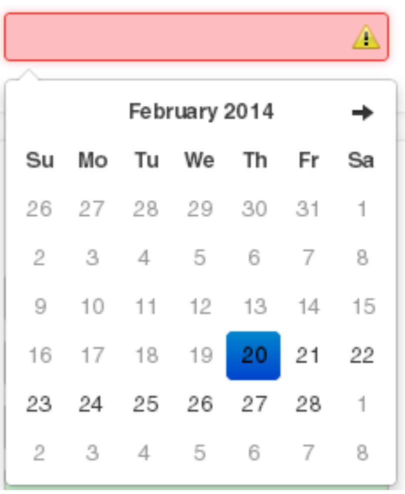
Long Visual Answer
Click on Admin Area
Click on Create Contacts



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



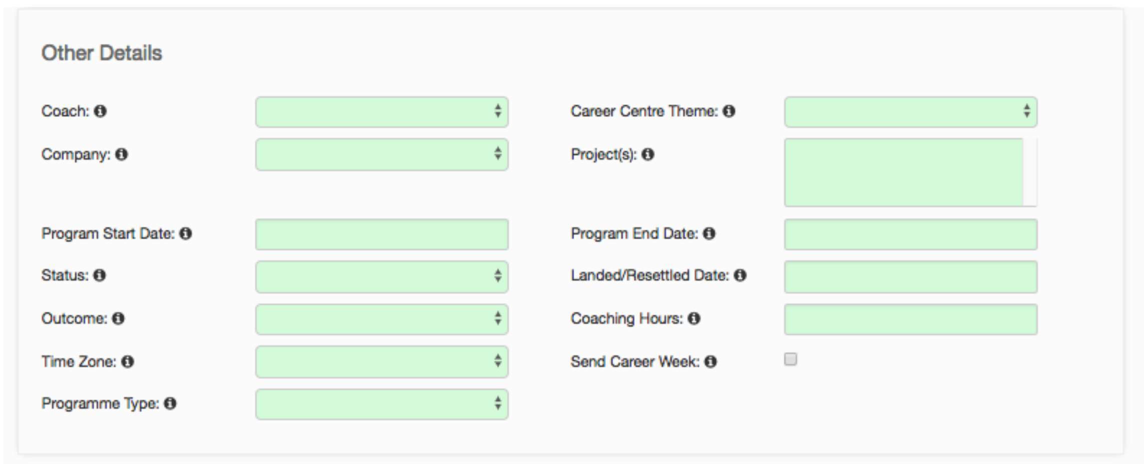
Items in Account Information: Pink boxes have to be filled out…Career Center End Date (CCED) you should pick off of calendar which pops up after you click on CCED box



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.

"Other Details":

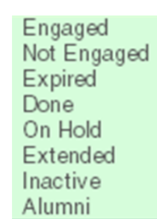


Coach – Assign a coach from the drop-down menu … You can leave blank if the candidate has not started yet or you don't know yet. (You can add later by editing Contact from inside the CCM.) Leave "coach" blank if you are assigning to another OIGP firm.

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

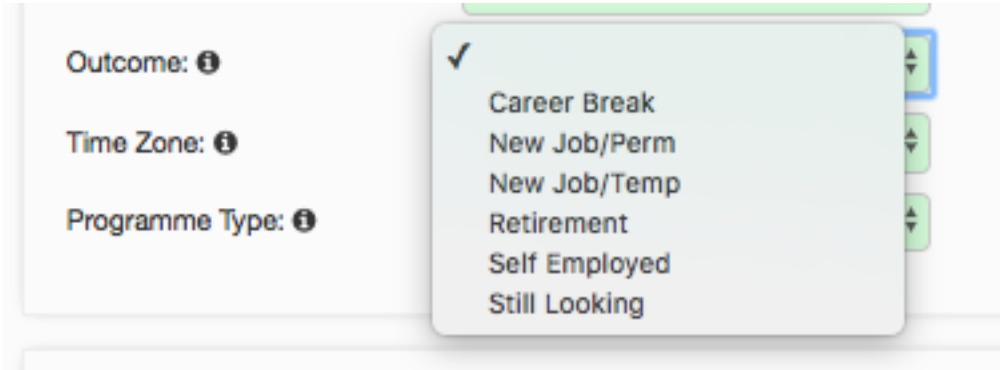
Status –



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 =

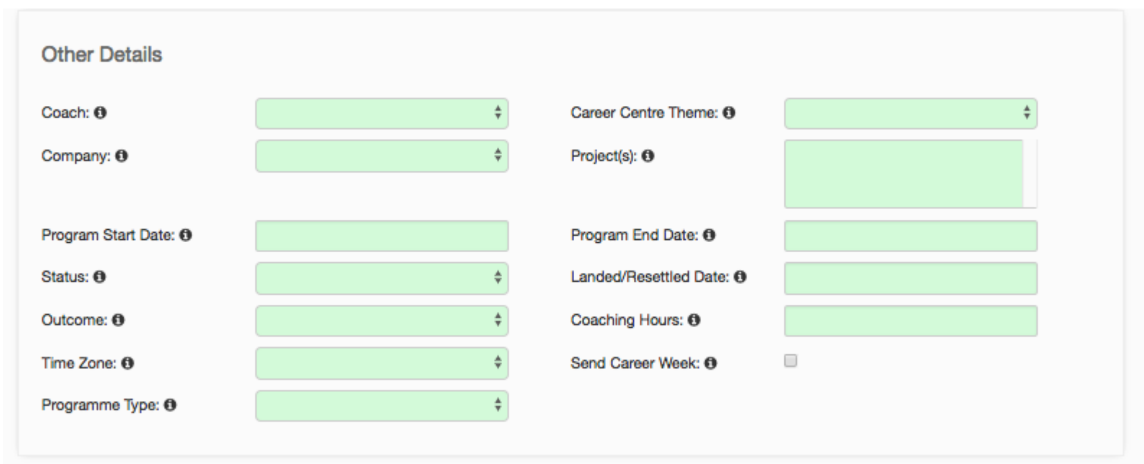
Alumni = Engaged and reached end of program time … can change manually also

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.



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

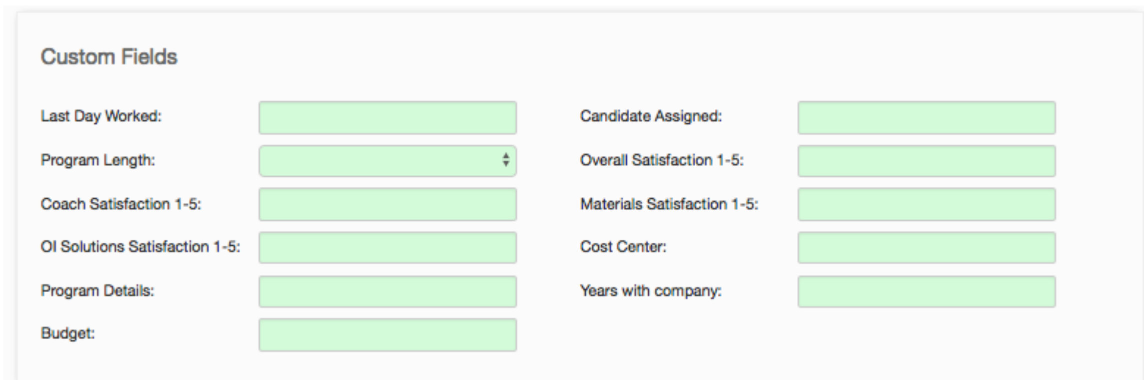
Landed/Resettled Date – For reporting only

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.

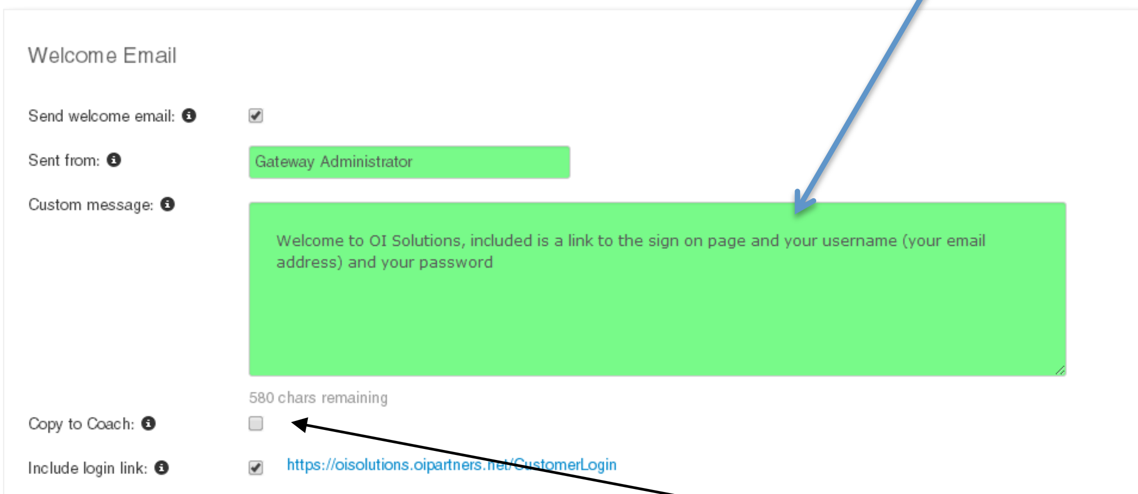
“Custom Fields”

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



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

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



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.

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

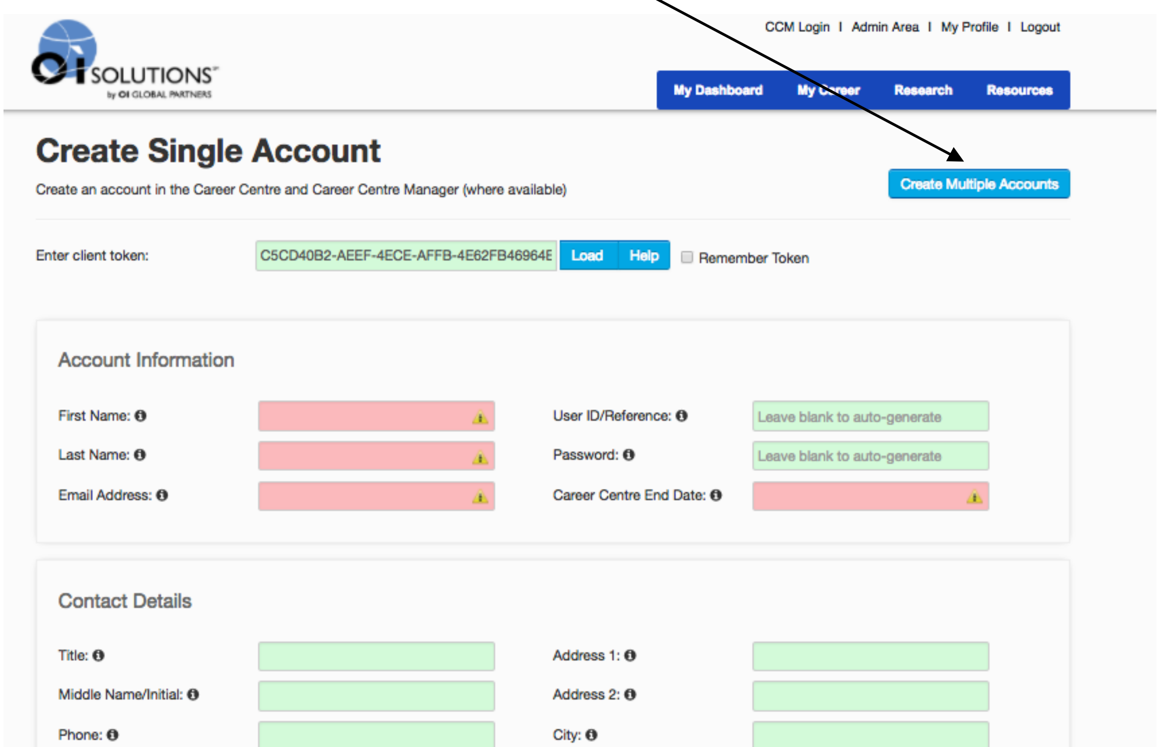
First Name	Last Name	Email	Password	User ID/Reference
abby2	abb2	abby2.abby2@abby.com	abby123	41224c11-4881-4b3d-85d3-9b932187849f

Download Table

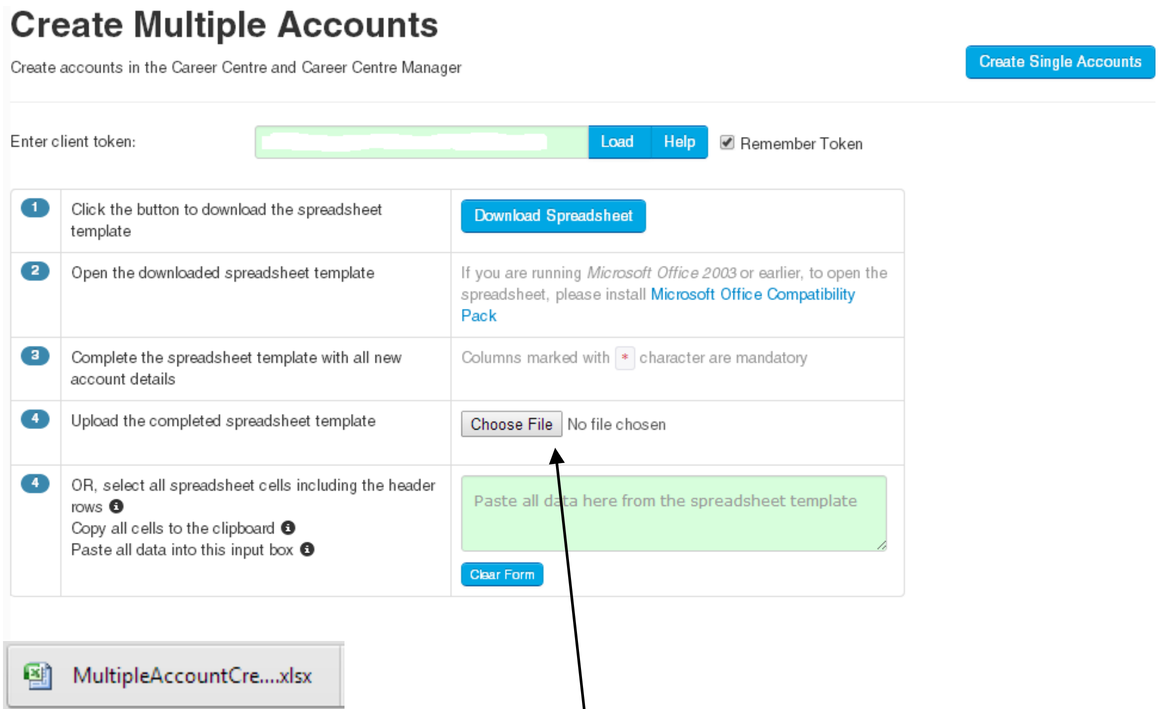
12. How do I create multiple new contacts?

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

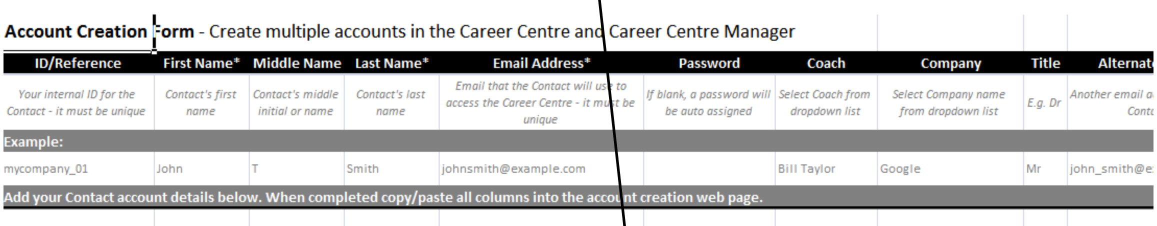
Long Visual Answer
Click on Admin Area
Click on Create Contacts
Select **Create Multiple Accounts** on right



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



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

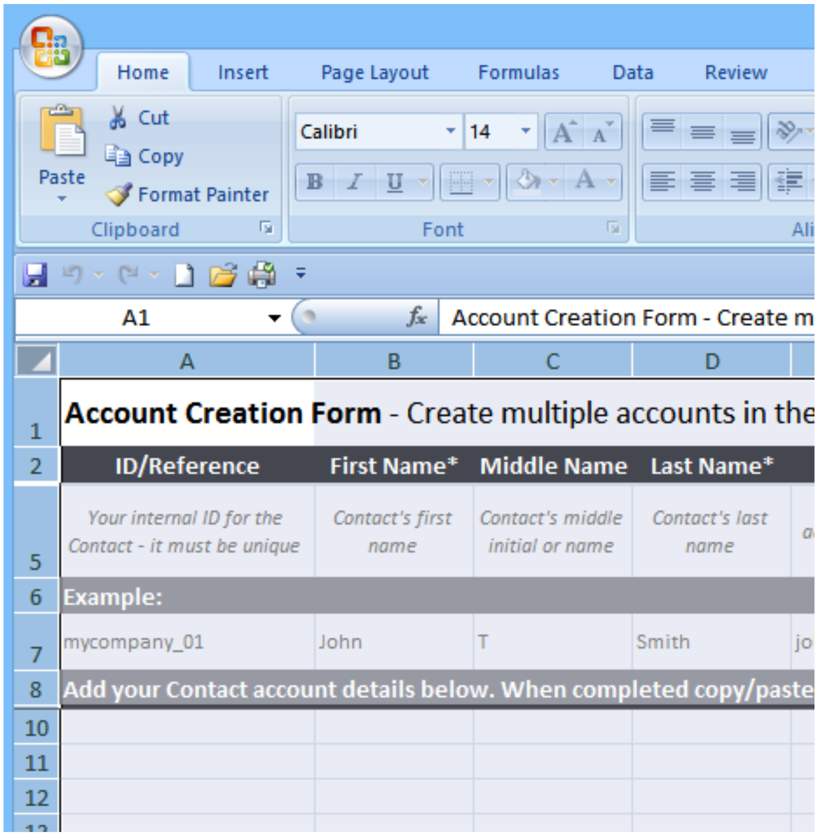


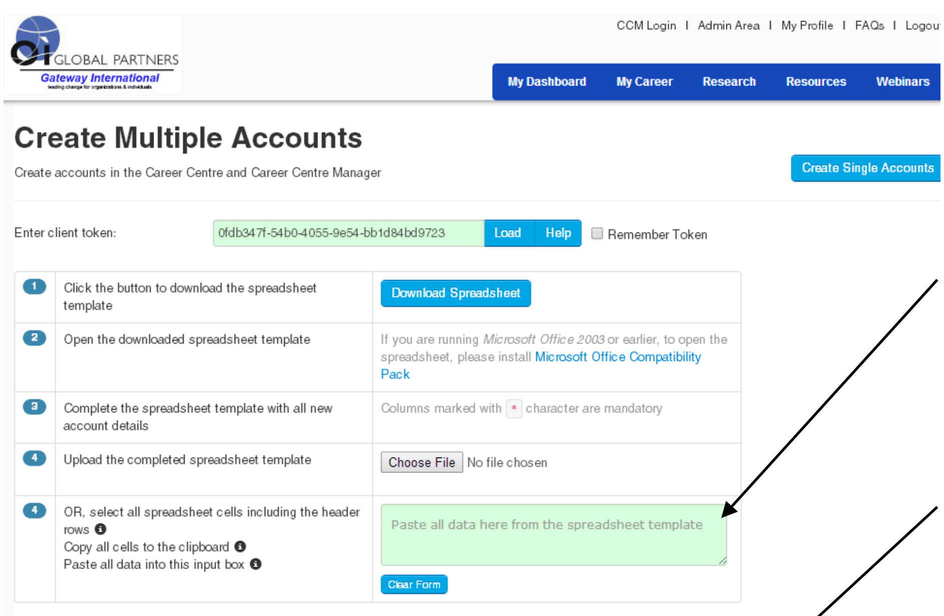
No spaces in welcome message… watch date format… when done, save…

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)

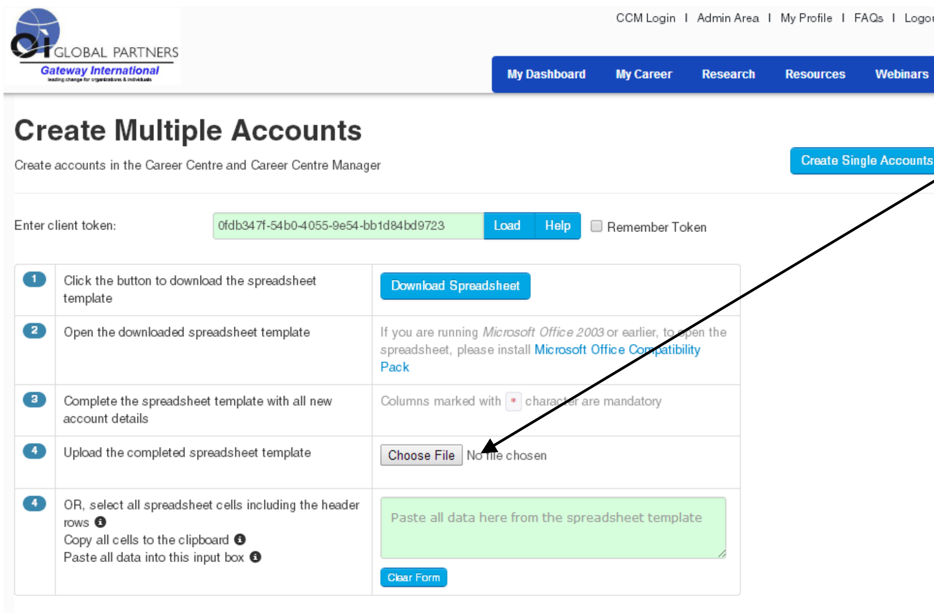




Method 1
Cut and Paste
Go back to the Multiple Accounts page

Paste (Ctrl V) into the box

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



Method 2
Upload
Save

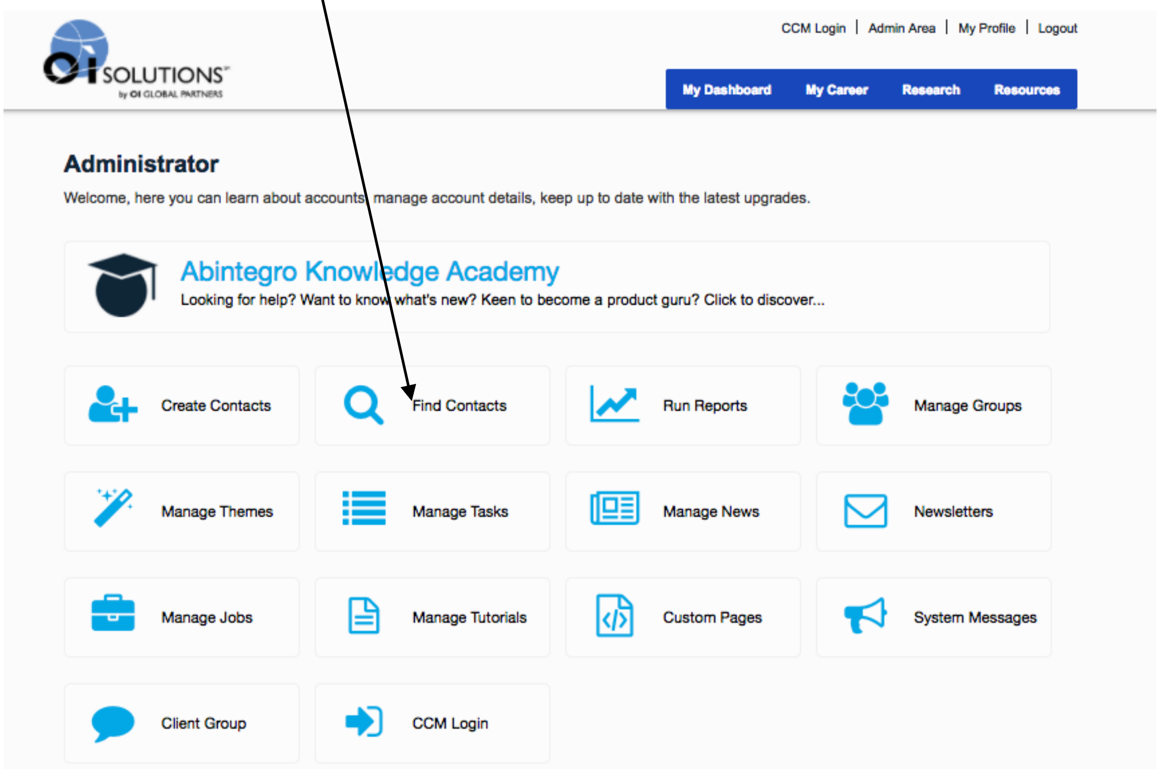
Choose file

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

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

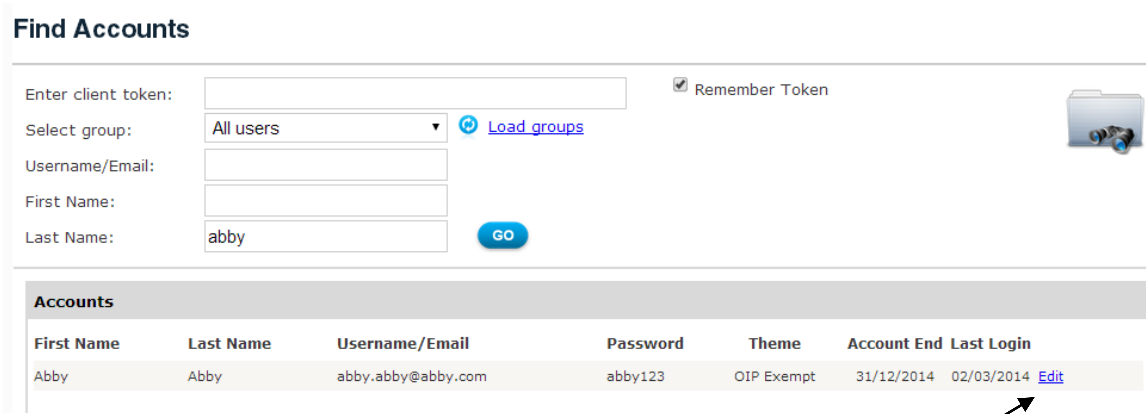
Short Answer:
Login to the OI Solutions website
Go to the top right of the page
Click on Admin Area
Click on Find Contacts
Put in firm token and Load
Put in last name or email address and hit Go

Long Visual Answer
Click on Admin Area
Click on Find Contacts

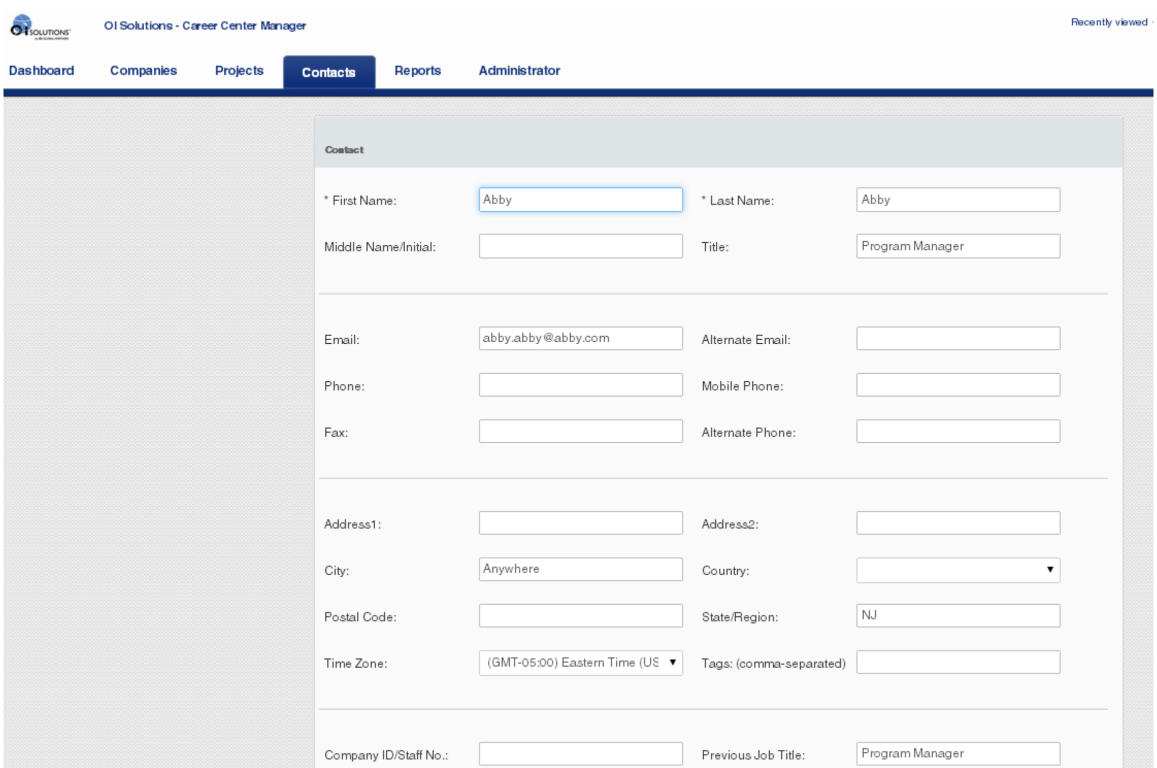


Put in firm token and Load

Put in last name or email address and hit go



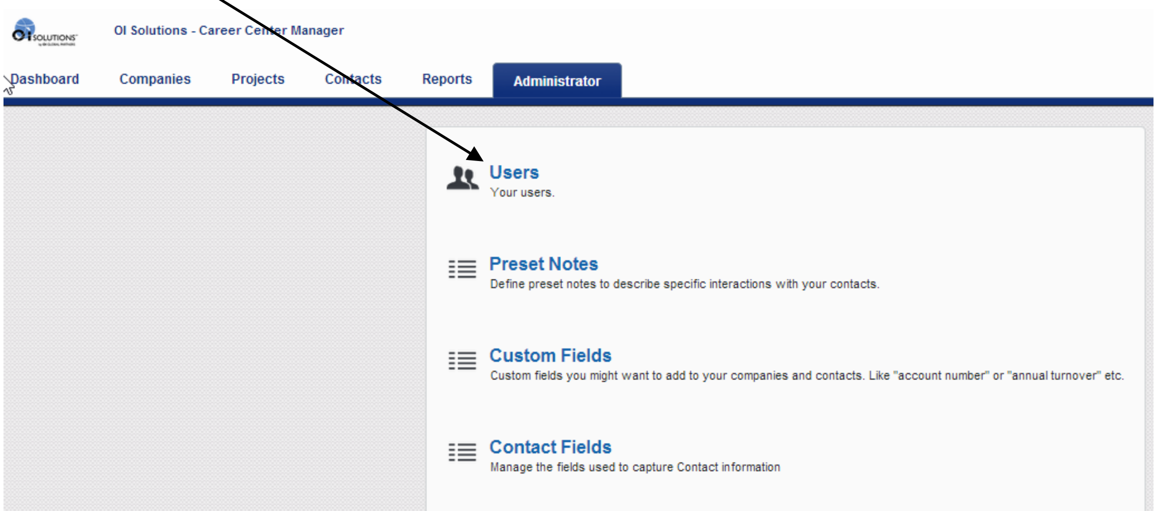
Results will show up on screen, if you need to change… click on edit
System will put you into the CCM, into the contact's editable screen… you can update, change all items from here.



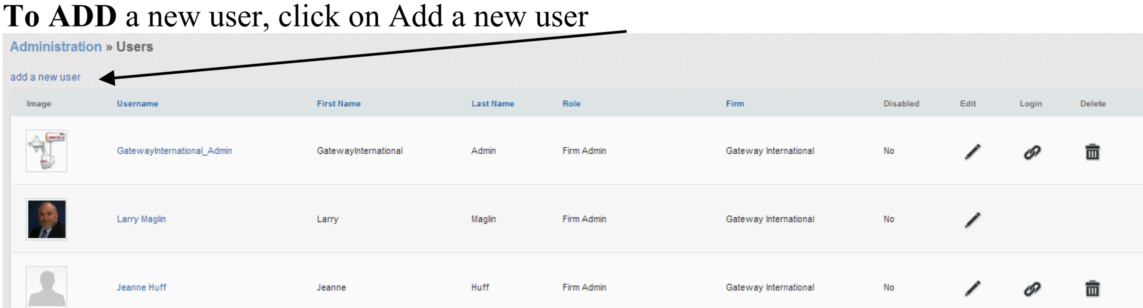
14. How do I create/edit users? (Coach – Firm Admin – Business Developer)

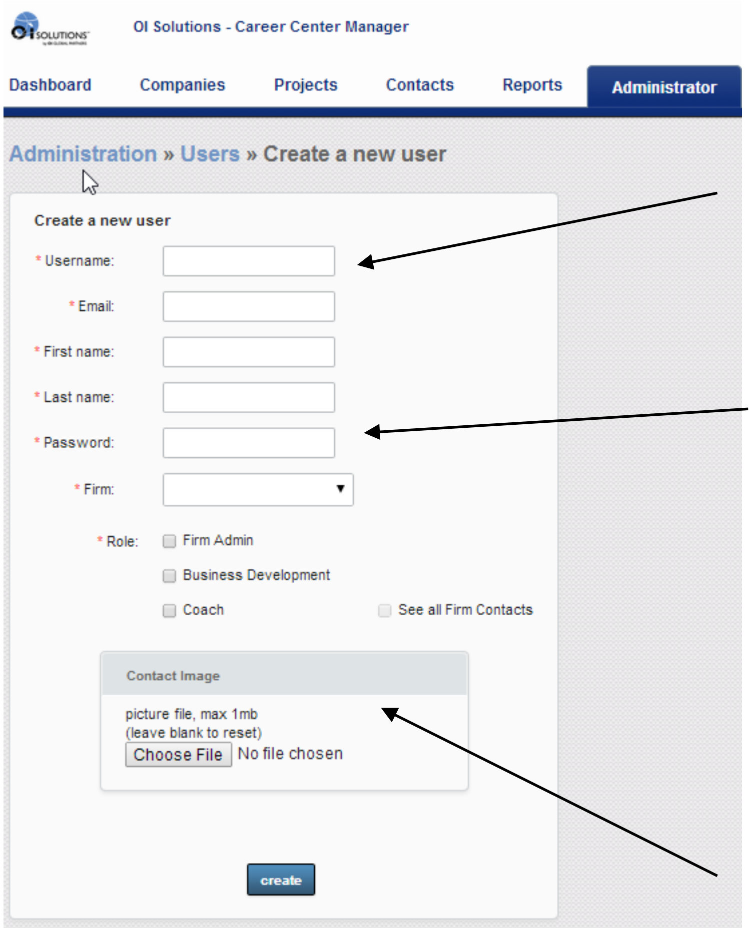
Short Answer:
Login to the OI Solutions website
Go to the top right of the page
Click on CCM
Go to Administrator

Pick Users



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





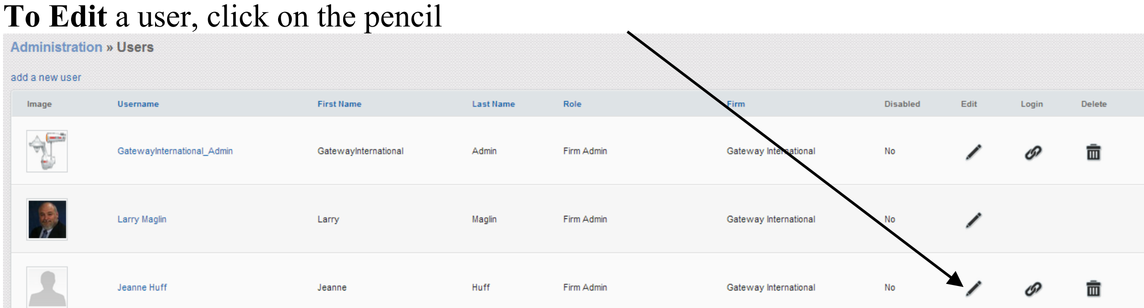
Add username … First last name
Email = Valid email address
First name
Last name

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

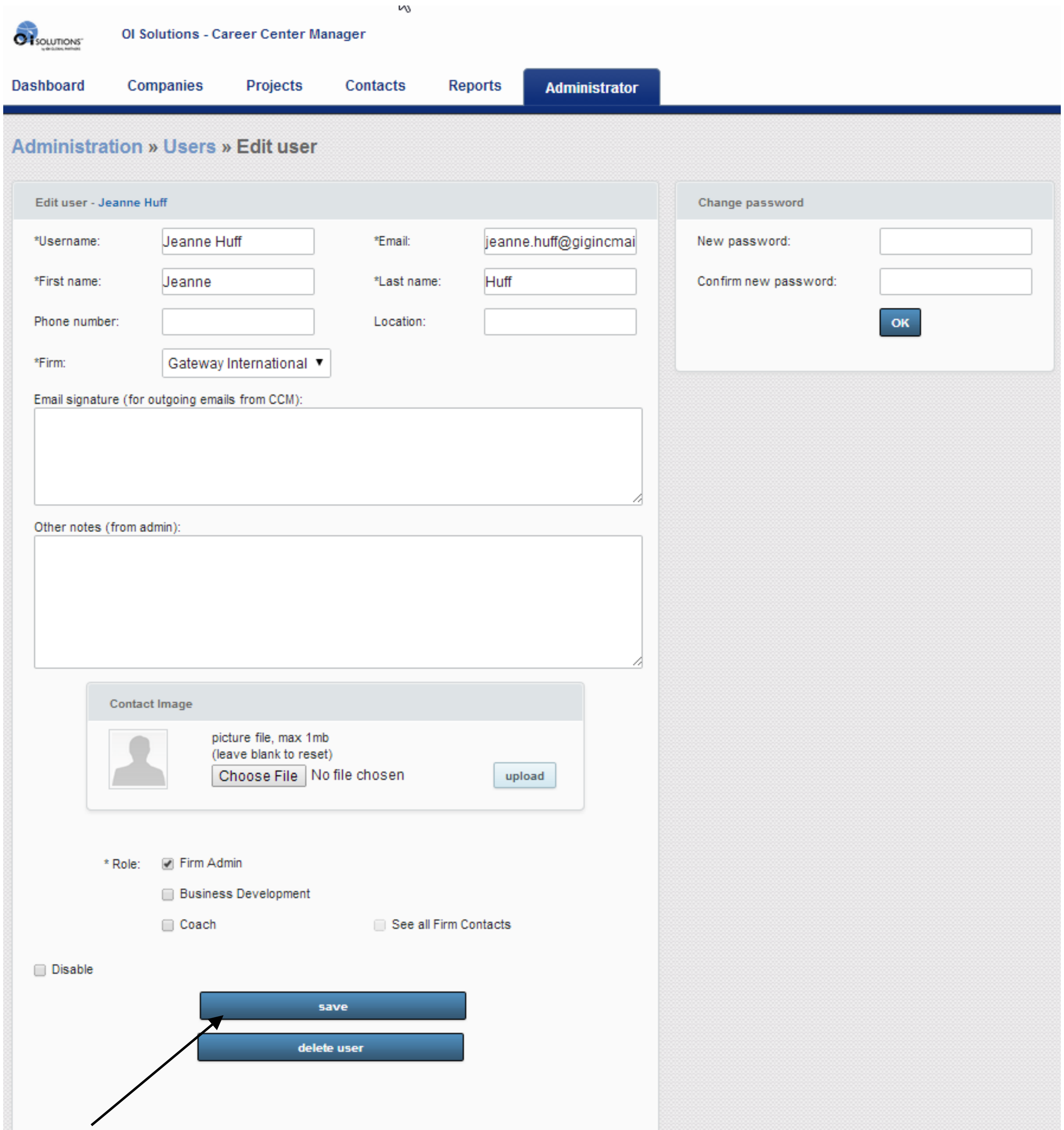
Picture candidates will see

Hit create… done…

To Edit a user, click on the pencil



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

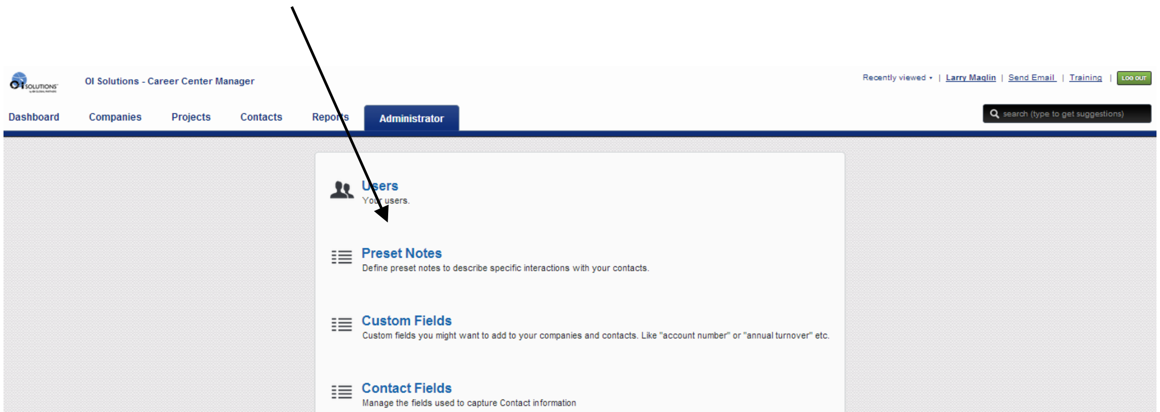


Hit save when done

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

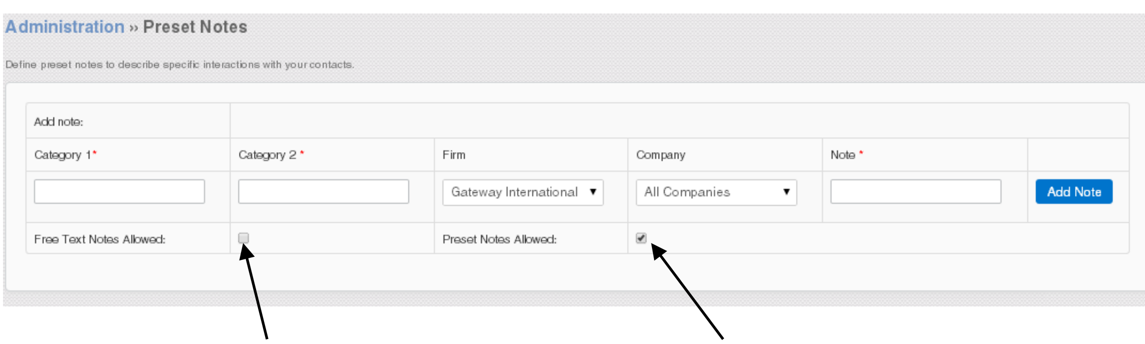
Long Visual Answer
Get to Preset Notes as above



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.



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

OP - Overview of Program	OP - Co-Managed Program & options
OP - Discussion of Background and Skills	OP - Review of client's plan for Achievement
OP-Discuss Unemployment - Severence Issues	OP-Discuss Training Options - via Unemployment or other sources
OP-Discuss Severance	OP-Discuss Finances
OP-Discuss Family and Relocation Options	

Outplacement (OP) Assessments

OP- Which Assessments to take (OI Solutions®)	OP-Review and Discussion of Assessments taken

Outplacement (OP) Career Planning

OP-Discuss Career Options (including Entrepreneurial or Retirement)	OP-ID of Markets, Industries, Geography and other options
OP-Develop Clients Objective(s)	OP-Review Industry Options
OP-Command Central and System Set up for Search	

Outplacement (OP) Resume Creation

OP-How to do C.A.R.s via Functional Skills Matrix	OP-Review and modification of C.A.R.s
OP-Types and Uses of Resumes	OP-How to Modify Resume for Specific Opportunity
OP-Draft Resume or Bio created and sent for review	OP-LinkedIn Profile
OP-Review of resume or Bio	OP-Resume Approved by client
OP-Bio Approved by client	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.

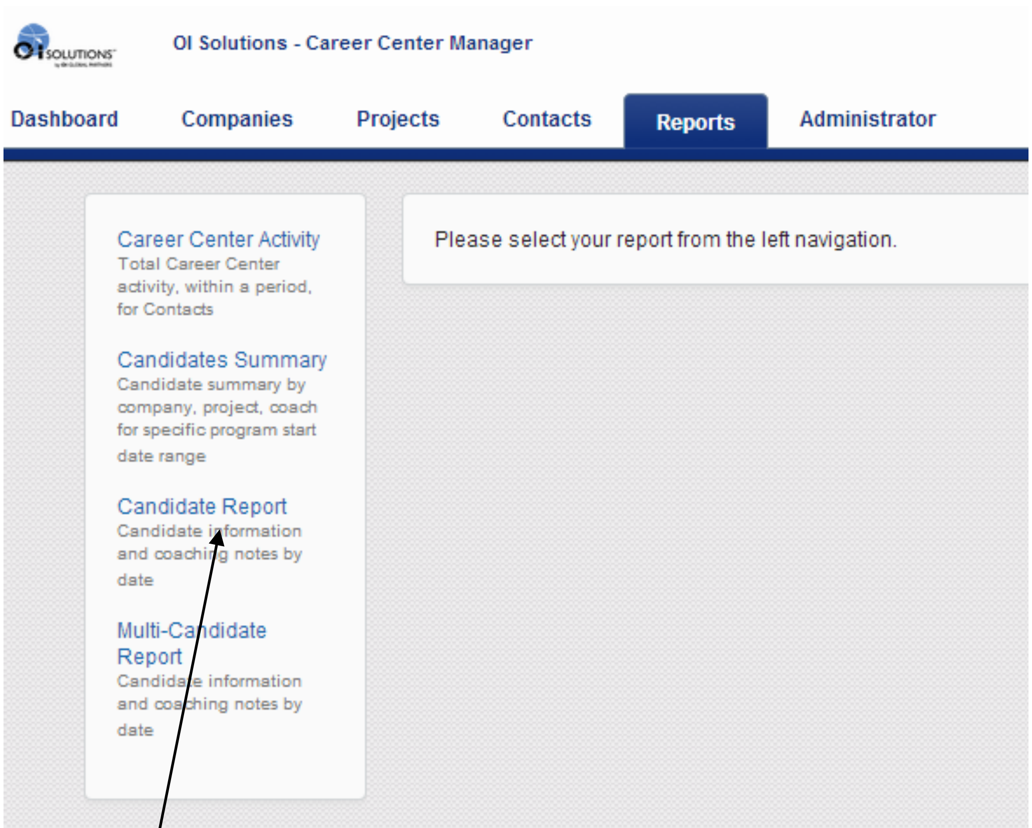
Add note:					
Category 1 *	Category 2 *	Firm	Company	Note *	
		Gateway International	All Companies		Add Note
Free Text Notes Allowed:		Preset Notes Allowed:	☑		

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

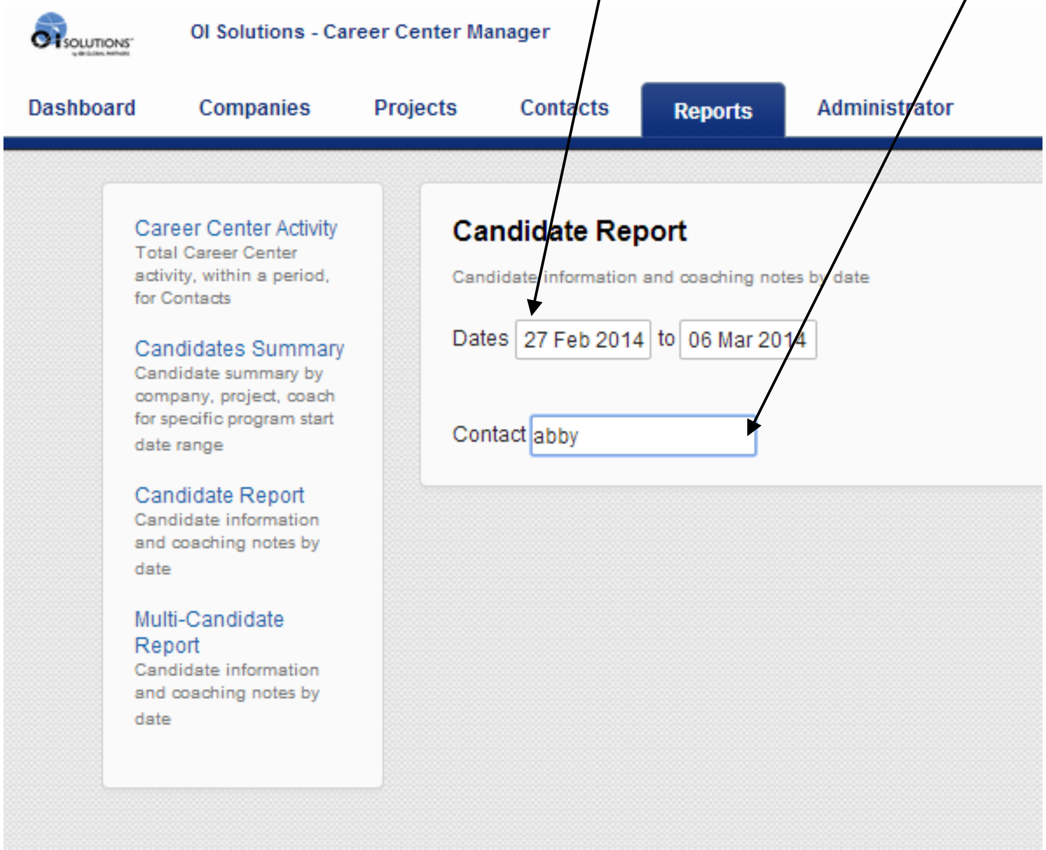
Long Visual Answer
Get to Reports as above



Pick the type of report you wish to run:

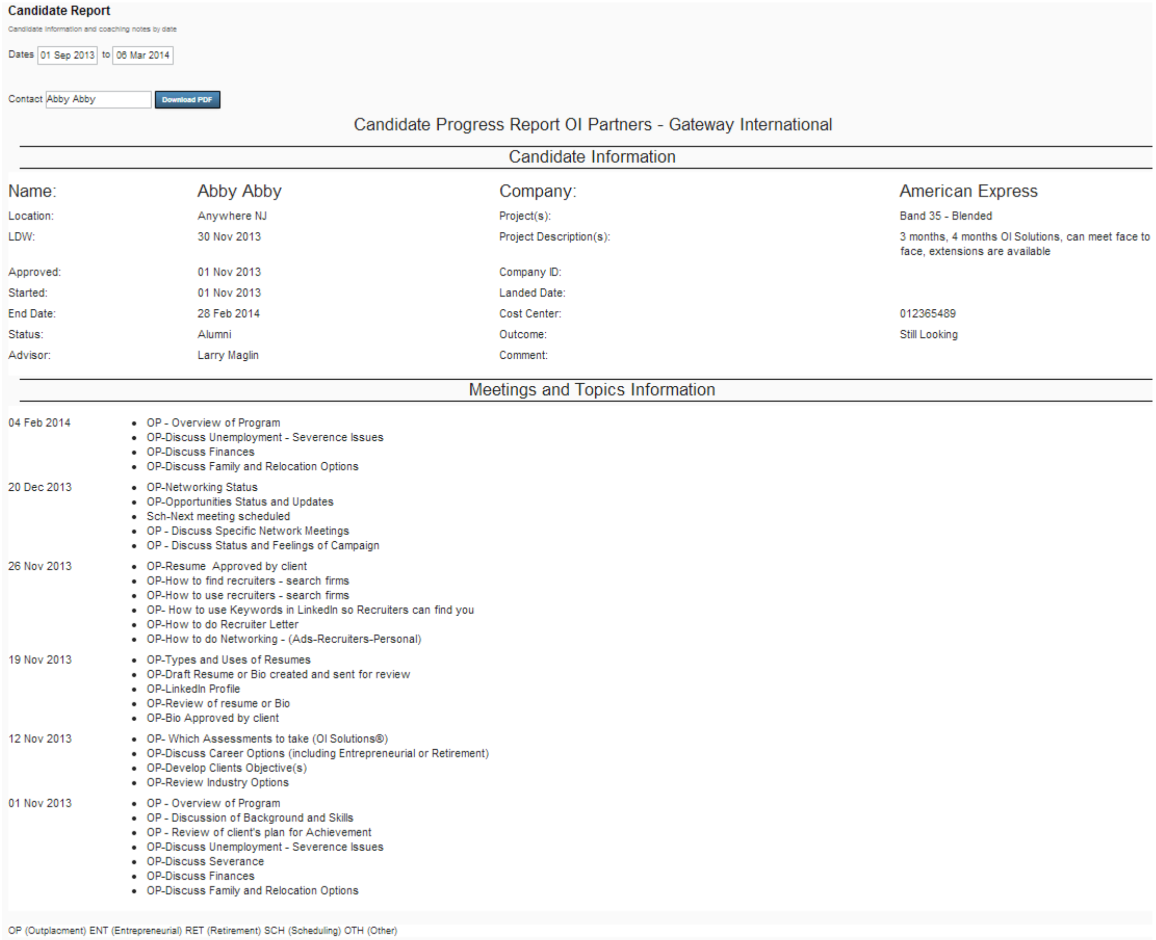
Candidate Report

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.



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

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

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

Meetings and Topics Information

04 Feb 2014
- OP - Overview of Program
- OP-Discuss Unemployment - Severence Issues
- OP-Discuss Finances
- OP-Discuss Family and Relocation Options

20 Dec 2013
- OP-Networking Status
- OP-Opportunities Status and Updates
- Sch-Next meeting scheduled
- OP - Discuss Specific Network Meetings
- OP - Discuss Status and Feelings of Campaign

26 Nov 2013
- OP-Resume Approved by client
- OP-How to find recruiters - search firms
- OP-How to use recruiters - search firms
- OP- How to use Keywords in LinkedIn so Recruiters can find you
- OP-How to do Recruiter Letter
- OP-How to do Networking - (Ads-Recruiters-Personal)

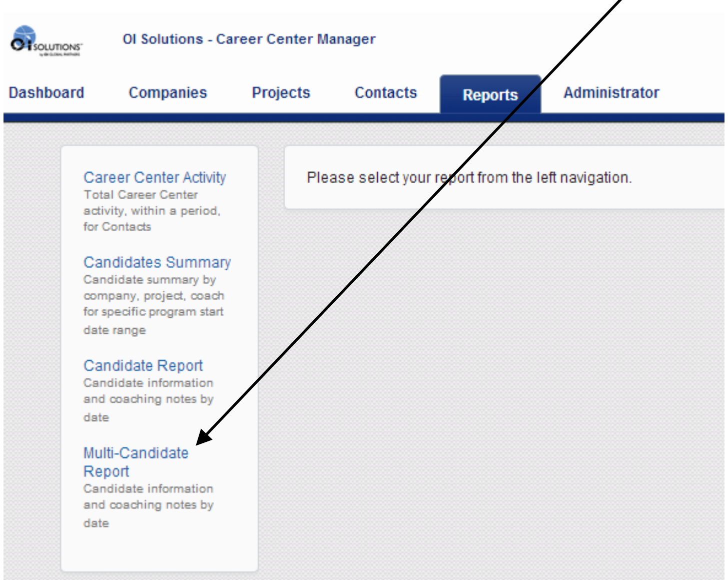
19 Nov 2013
- OP-Types and Uses of Resumes
- OP-Draft Resume or Bio created and sent for review
- OP-LinkedIn Profile
- OP-Review of resume or Bio
- OP-Bio Approved by client

12 Nov 2013
- OP- Which Assessments to take (OI Solutions®)
- OP-Discuss Career Options (including Entrepreneurial or Retirement)
- OP-Develop Clients Objective(s)
- OP-Review Industry Options

01 Nov 2013
- OP - Overview of Program
- OP - Discussion of Background and Skills
- OP - Review of client's plan for Achievement
- OP-Discuss Unemployment - Severence Issues
- OP-Discuss Severance
- OP-Discuss Finances
- OP-Discuss Family and Relocation Options

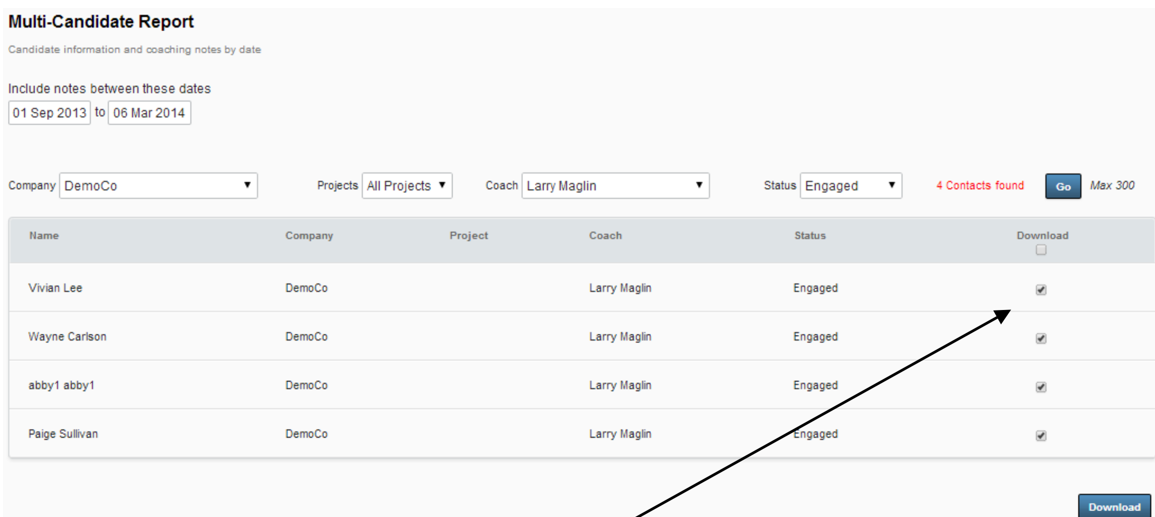
OP (Outplacment) ENT (Entrepreneurial) RET (Retirement) SCH (Scheduling) OTH (Other)

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

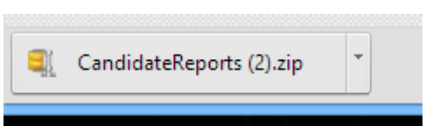


In the Multi-Candidate Report … Pick the criteria of information you want. As you pick criteria, the total number of records will show in red near the Go button.
You can pick a combination of some or all to filter the information.

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

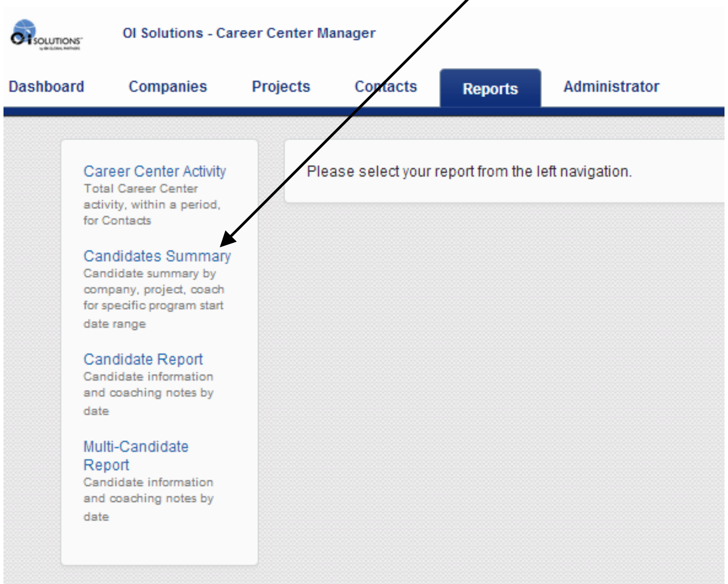


Can pick which ones to download (default is all) and click download

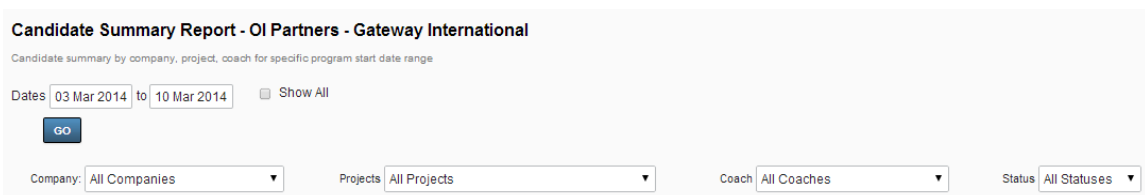


System will generate a Zip file which contains the 4 PDF documents, one for each contact.

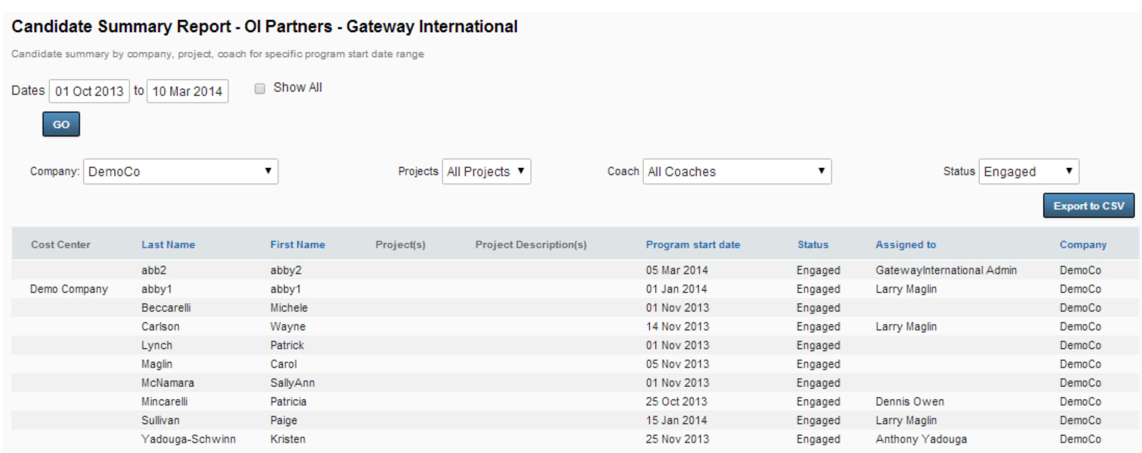
To run a Candidate Summary report, from Reports pick …



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



Example:
Demo Company – All Projects – All Coaches – Status: Engaged … results below
You can export to CSV (Excel)

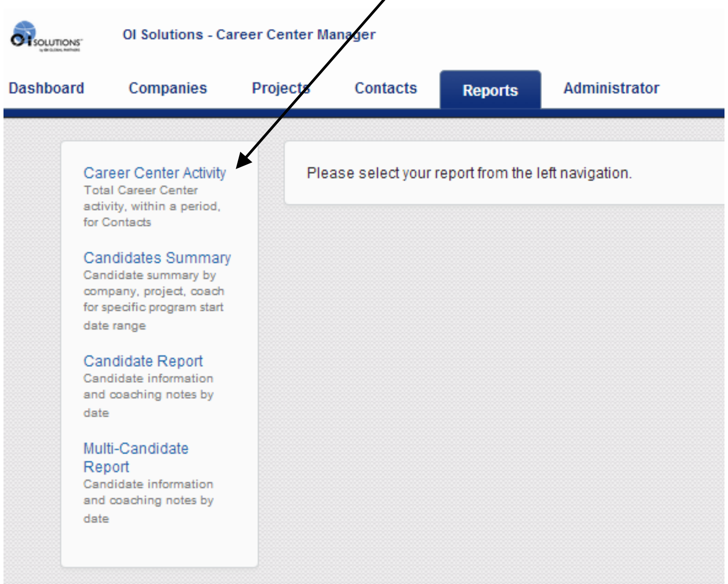


Cost Center	Last Name	First Name	Project(s)	Project Description(s)	Program start date	Status	Assigned to	Company
	abb2	abby2			05 Mar 2014	Engaged	GatewayInternational Admin	DemoCo
Demo Company	abby1	abby1			01 Jan 2014	Engaged	Larry Maglin	DemoCo
	Beccarelli	Michele			01 Nov 2013	Engaged		DemoCo
	Carlson	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

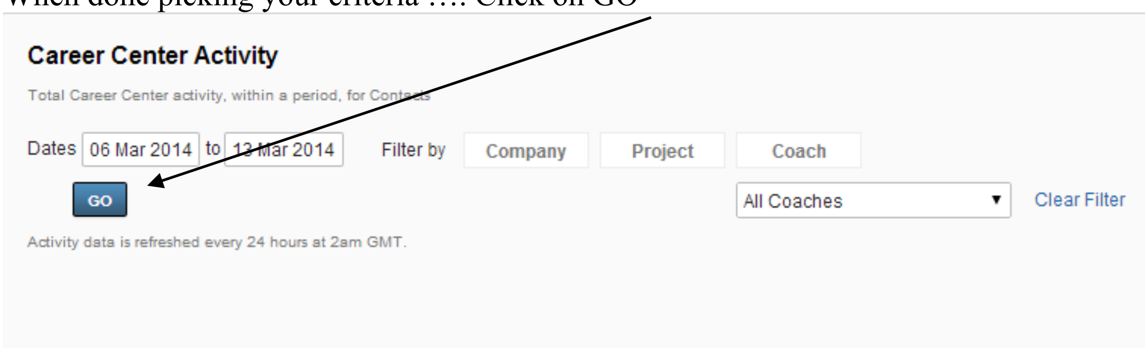
The CSV export will have the following fields:

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

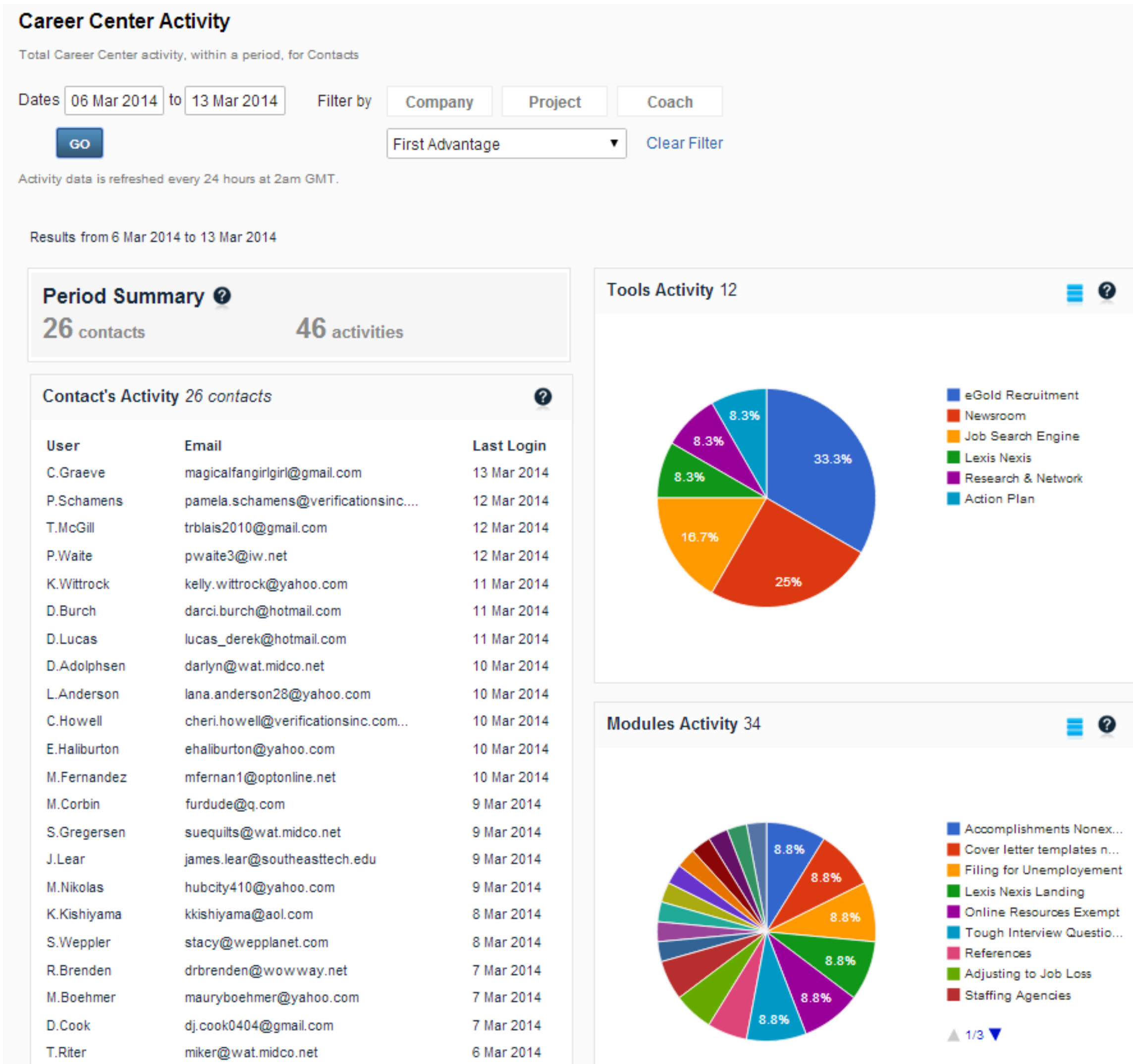
Career Center Activity for your firm



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*

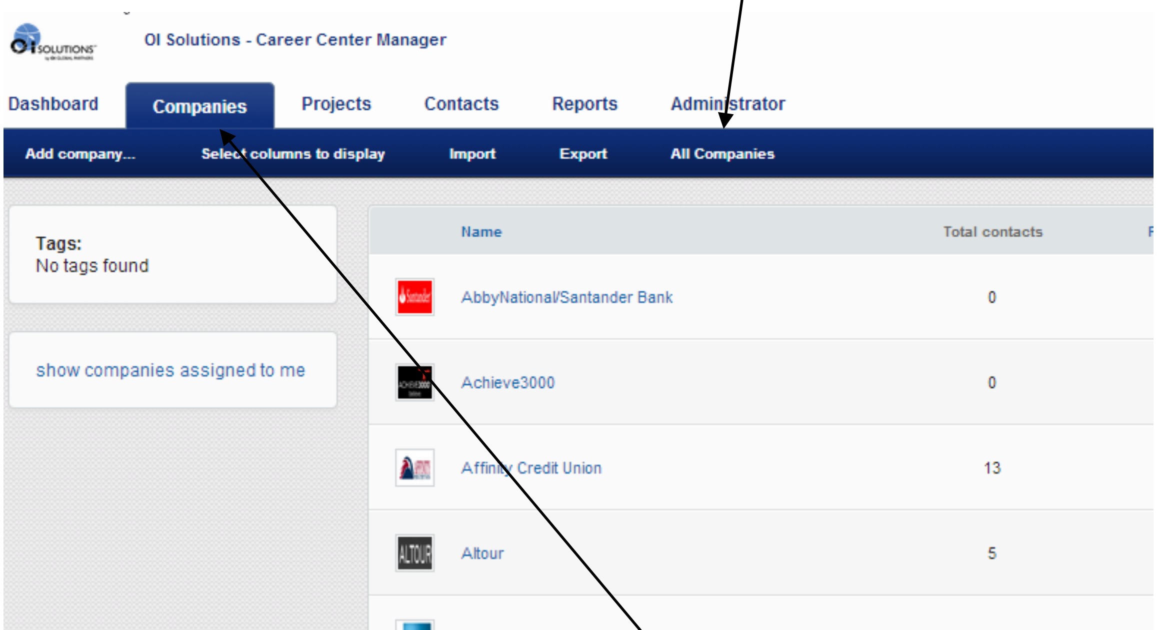
User	Email	Last Login
C.Graeve	magicalfangirlgirl@gmail.com	13 Mar 2014
P.Schamens	pamela.schamens@verificationsinc....	12 Mar 2014
T.McGill	trblais2010@gmail.com	12 Mar 2014
P.Waite	pwaite3@iw.net	12 Mar 2014
K.Wittrock	kelly.wittrock@yahoo.com	11 Mar 2014
D.Burch	darci.burch@hotmail.com	11 Mar 2014
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	mfernan1@optonline.net	10 Mar 2014
M.Corbin	furdude@q.com	9 Mar 2014
S.Gregersen	suequilts@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@wowway.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

Modules Activity 34

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

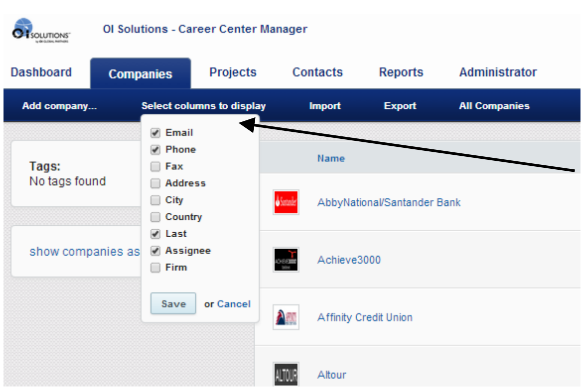
Short Answer:
Login to the OI Solutions website
Go to the top right of the page
Click on CCM
Click on Company
You will see list of your firm's companies in the system
If you wish **to see other OIGP companies,** click on "All Companies"



Long Visual Answer

Pick Companies tab to generate list and see submenu

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

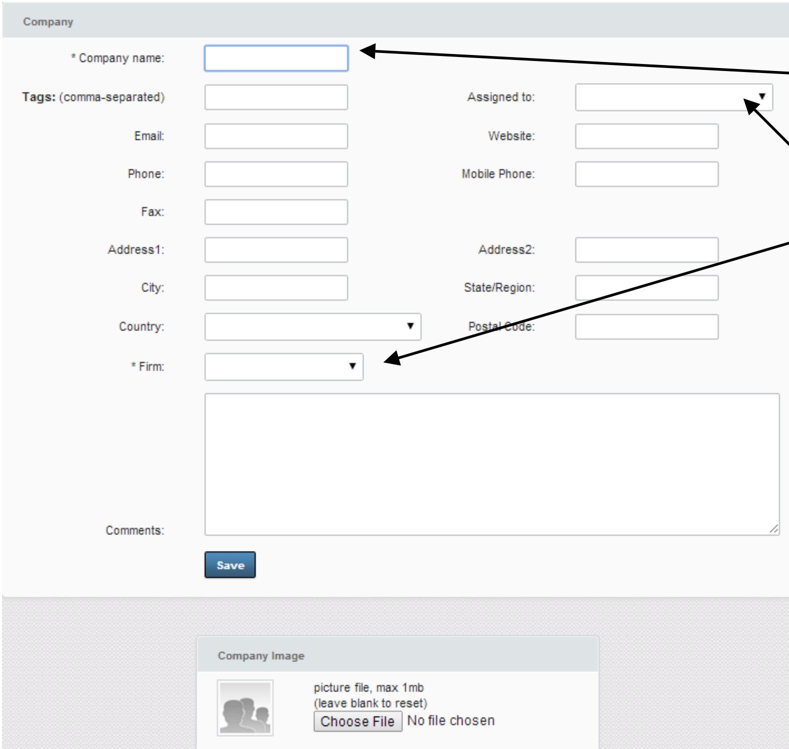


Pick items you wish to see on your list.

Save…

This setup will stay until you change it again.

To Add a Company – pick "Add a company" from submenu



Minimum Information

Company Name

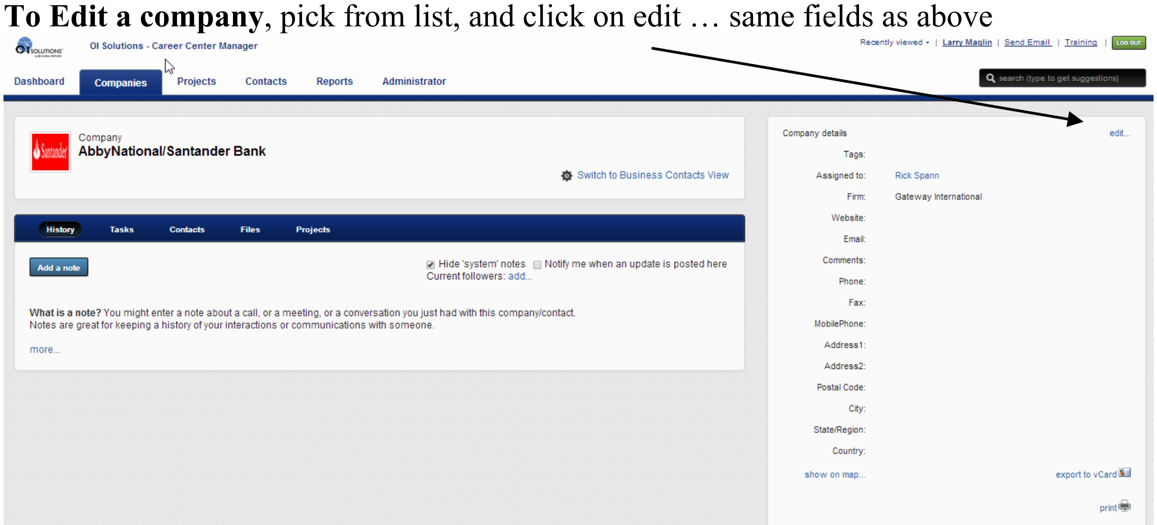
Assigned to (from list)

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

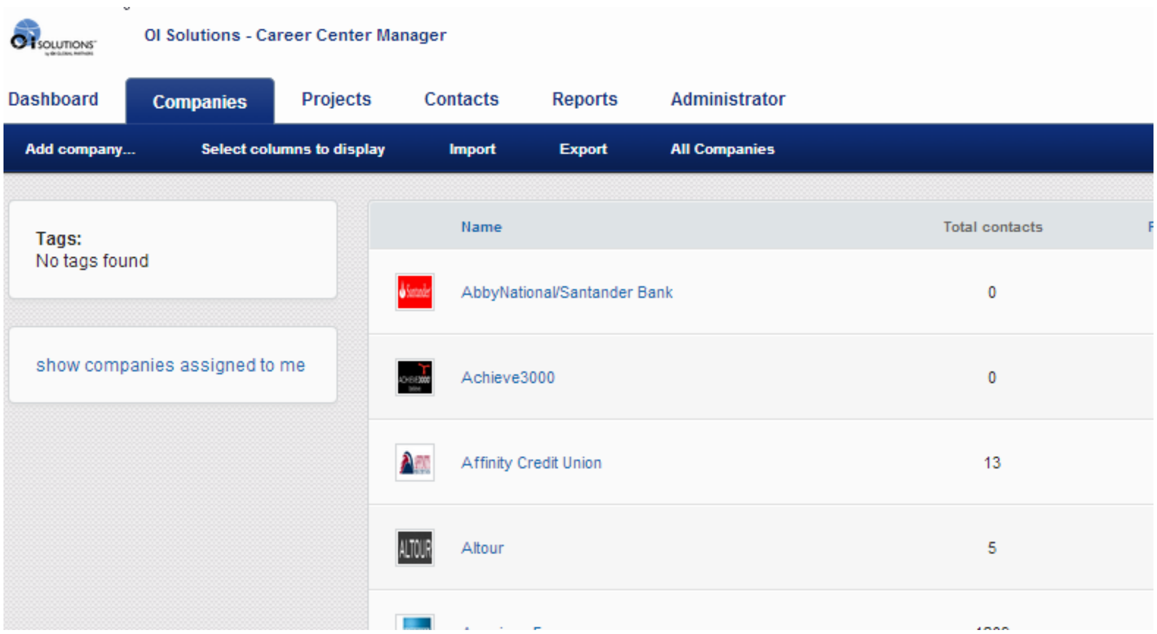
Suggest you put logo in for firm if you're going to give on-line access for reporting … Logo on Customer page will feed from logo you put in to Customer Page

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.

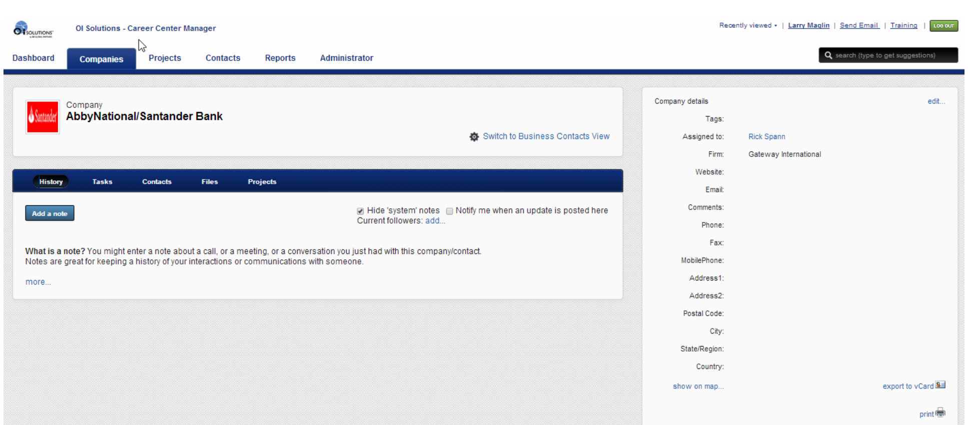


Long Visual Answer

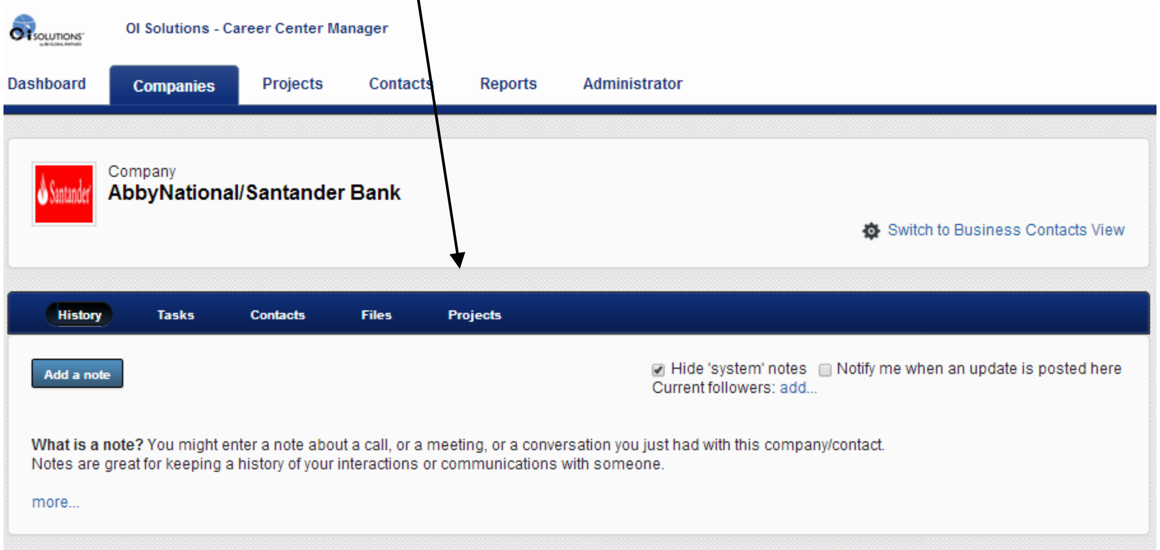
Pick Companies tab to generate list and see submenu

Pick a company from list or from Search Box on right

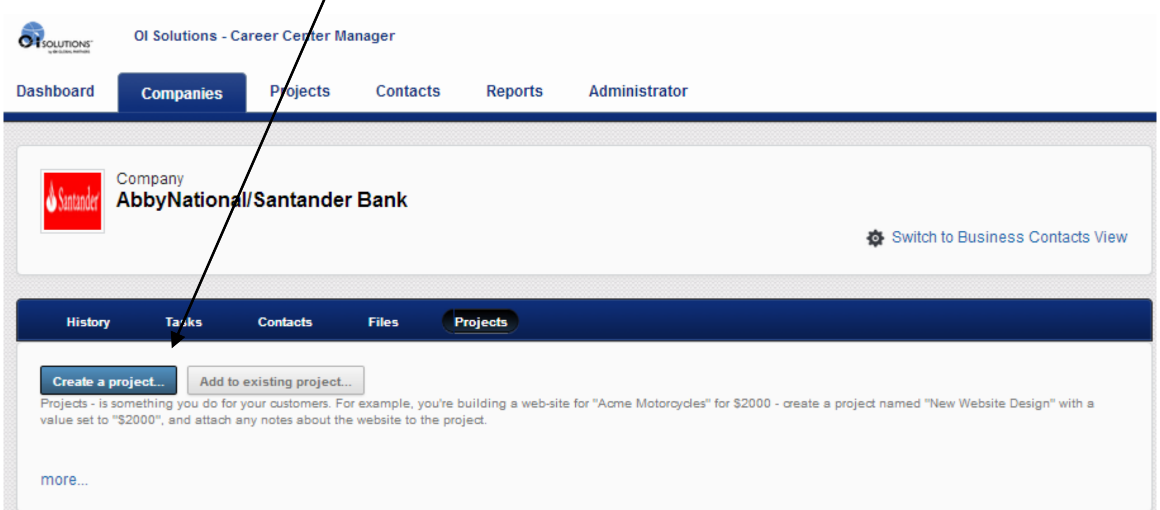
Results in Company Page:



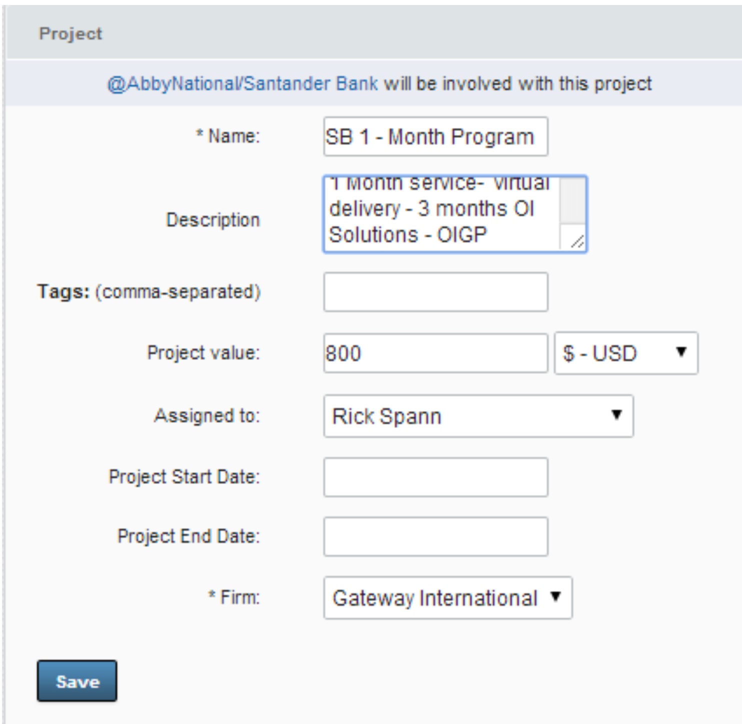
Pick "Projects" off submenu



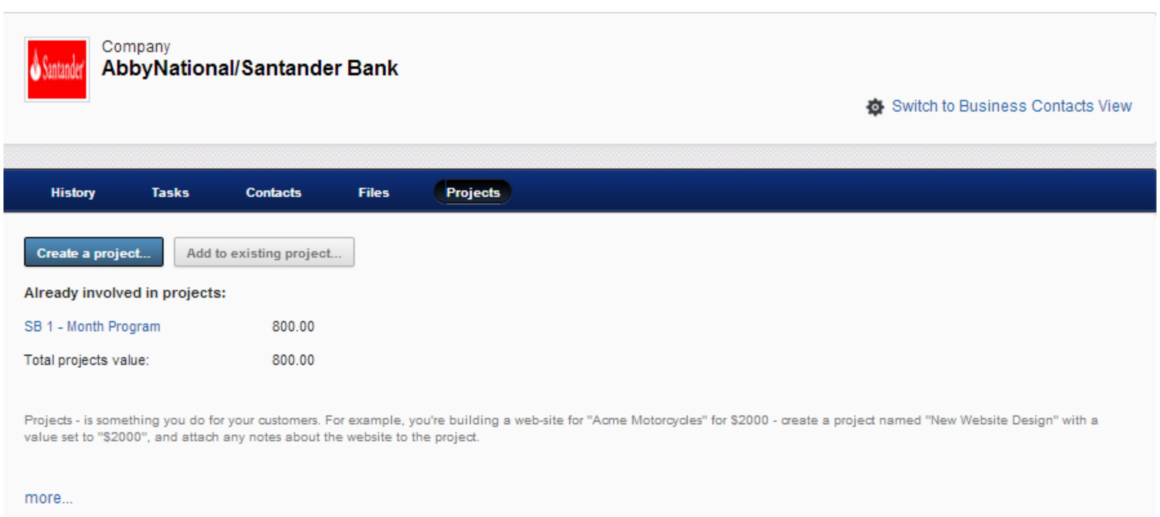
Pick the Create a Project



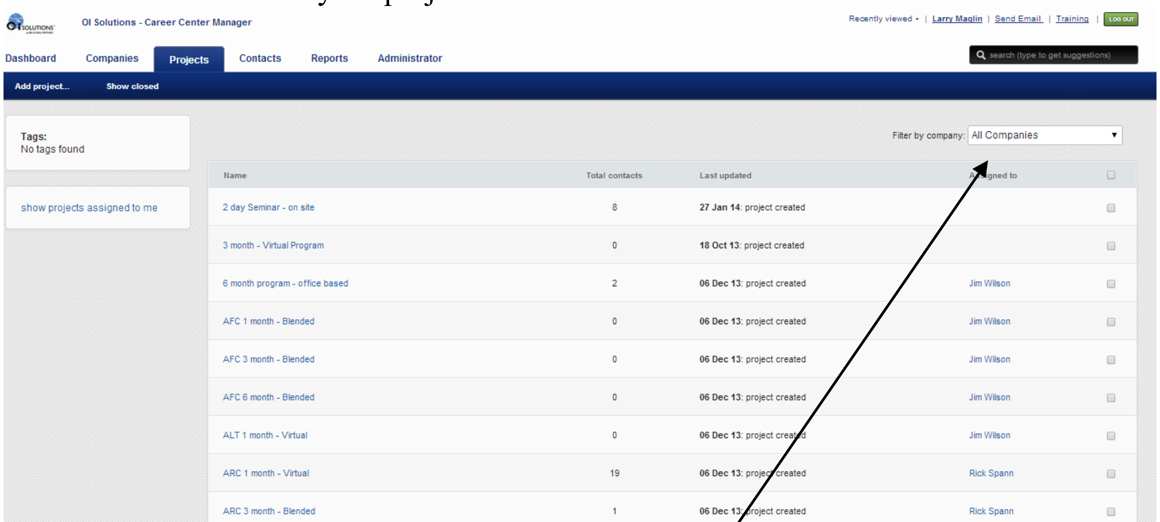
Project Box will come up… populate it
The Name field will come up in the drop-down after you pick a company, when you create new contacts in the Admin Area or Edit in the CCM under the contact page. Set your descriptions so they make sense if you are doing multiple programs for this company. The Name 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.



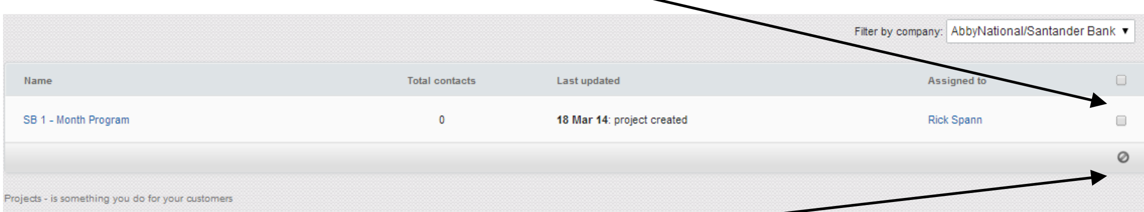
This project will now also show up if you pick projects under this company.



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



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



Click the icon to remove the project

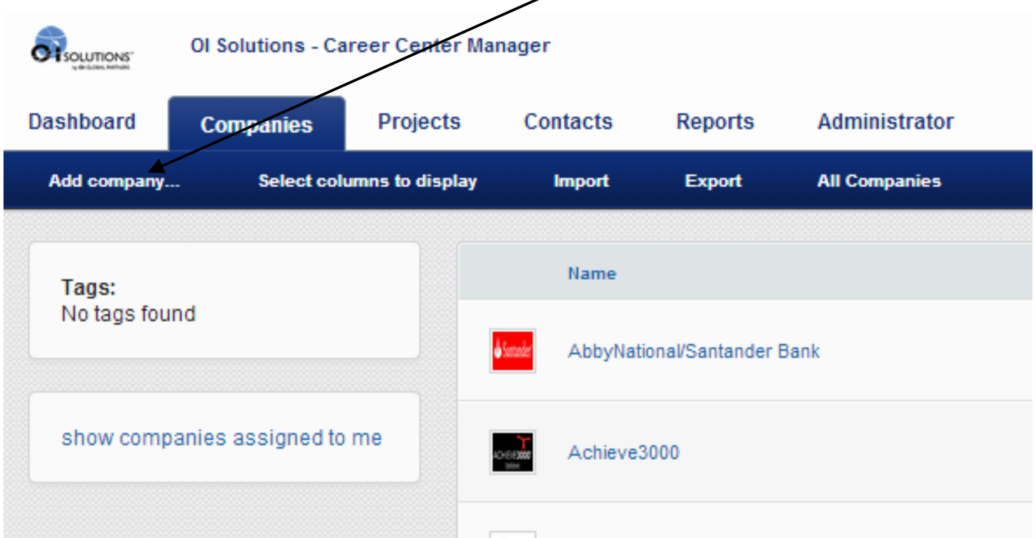
19. How do I add / edit / delete a company?

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

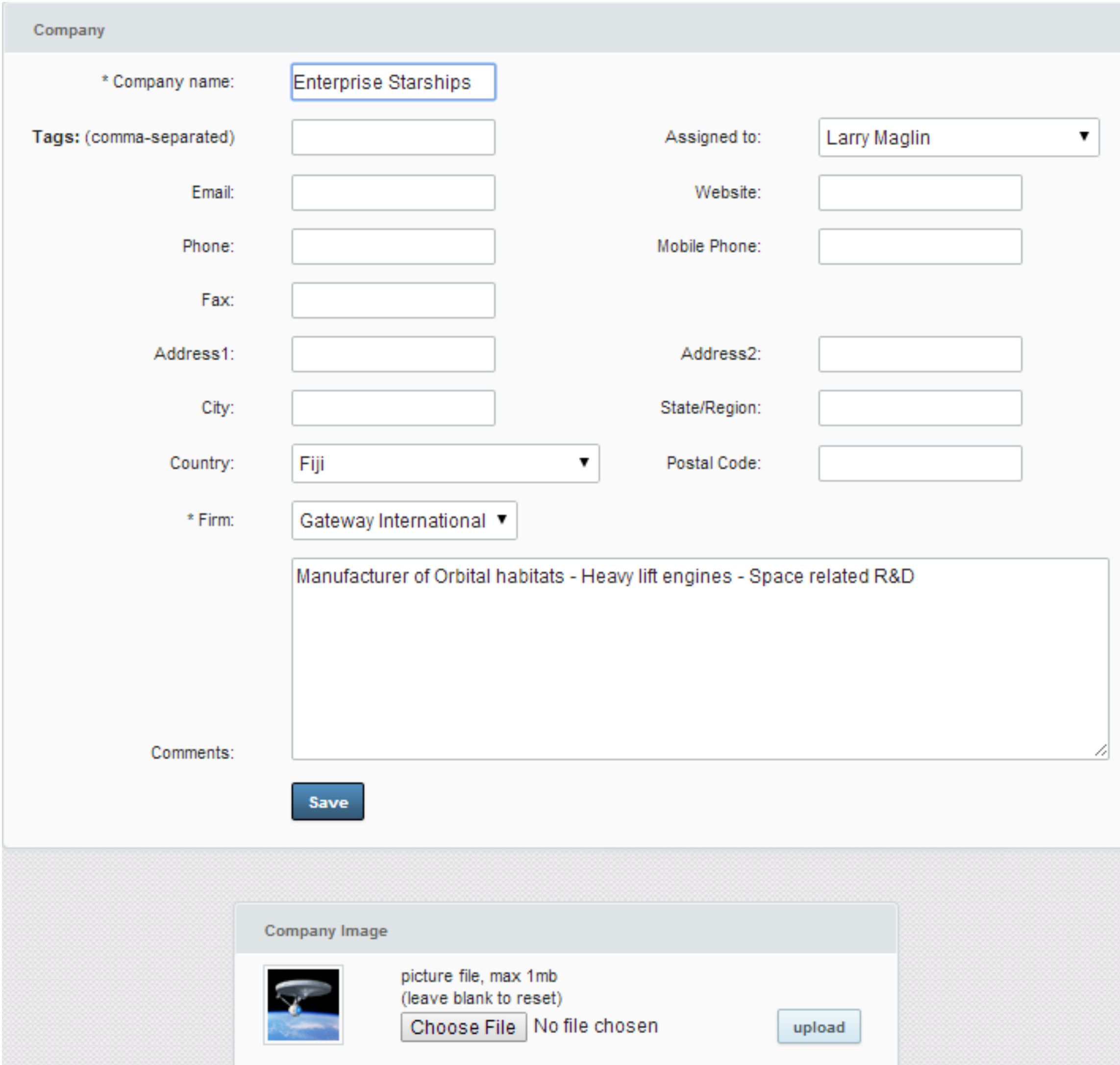
To Add a Company
CCM-Companies

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

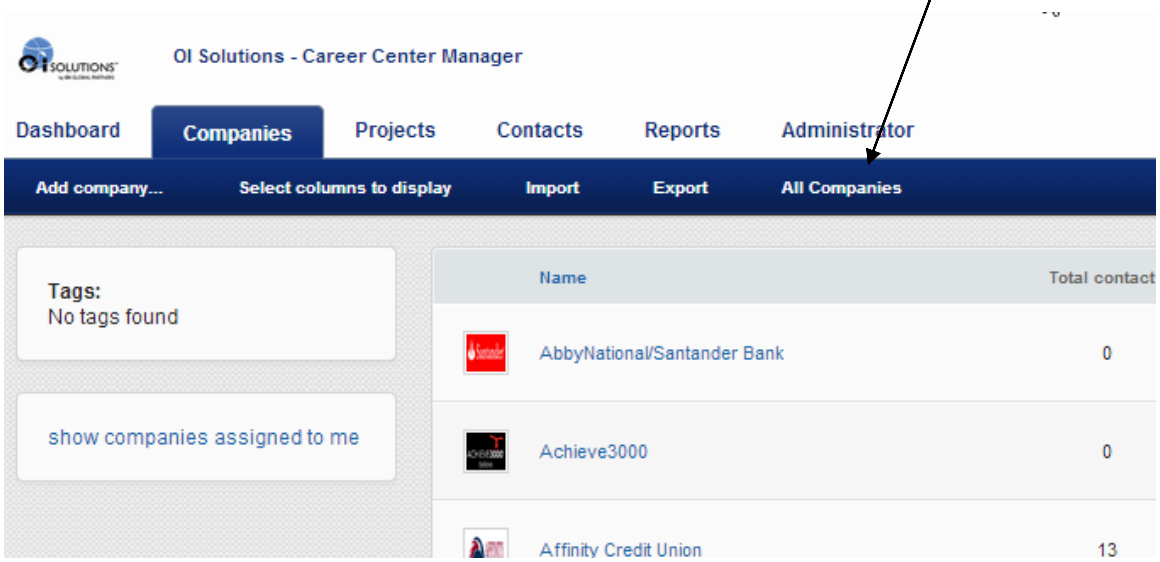
Populate and Save



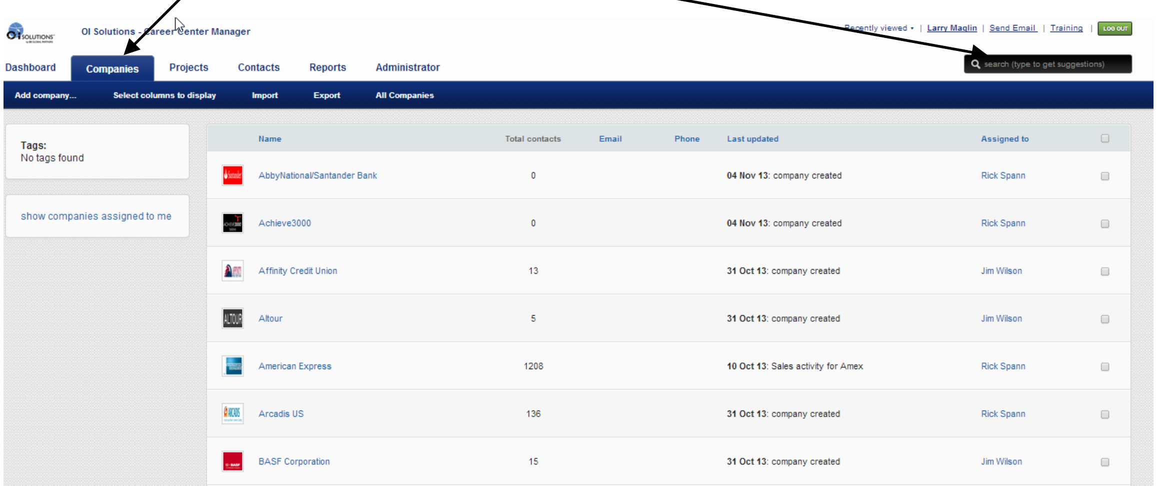
Company will now show up on your Companies list

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”

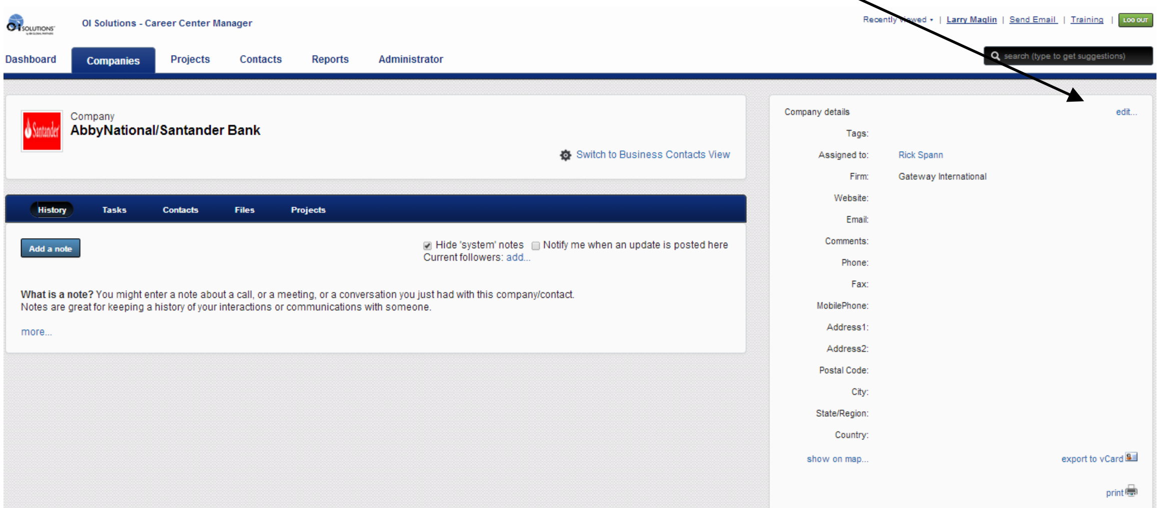


To Edit Company entry:
CCM – Companies or Search Box



Find the company you wish to edit, pick the company

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



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

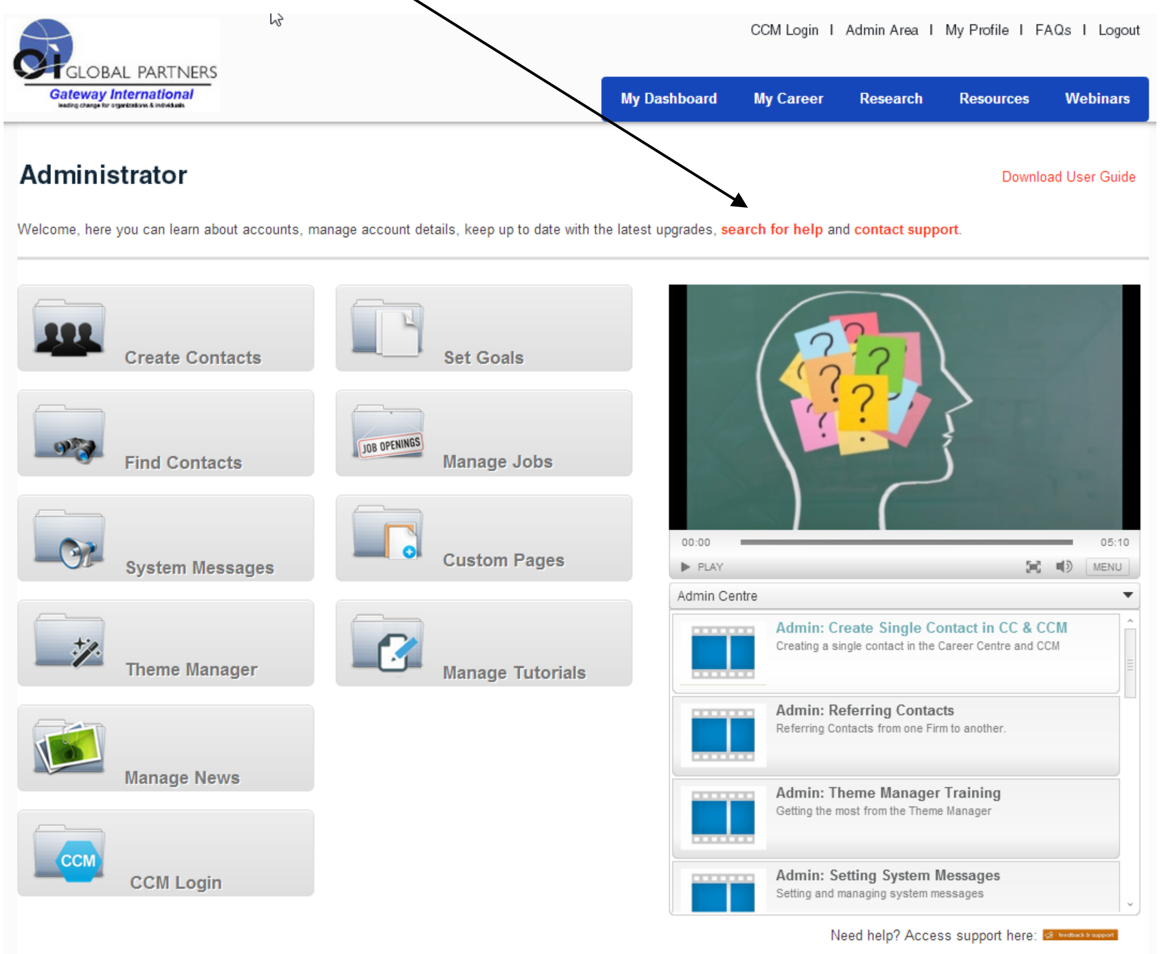
To Delete a Company (CCM – Companies – generate a list of companies)
Check off companies you wish to delete
And click on delete at bottom of page

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"

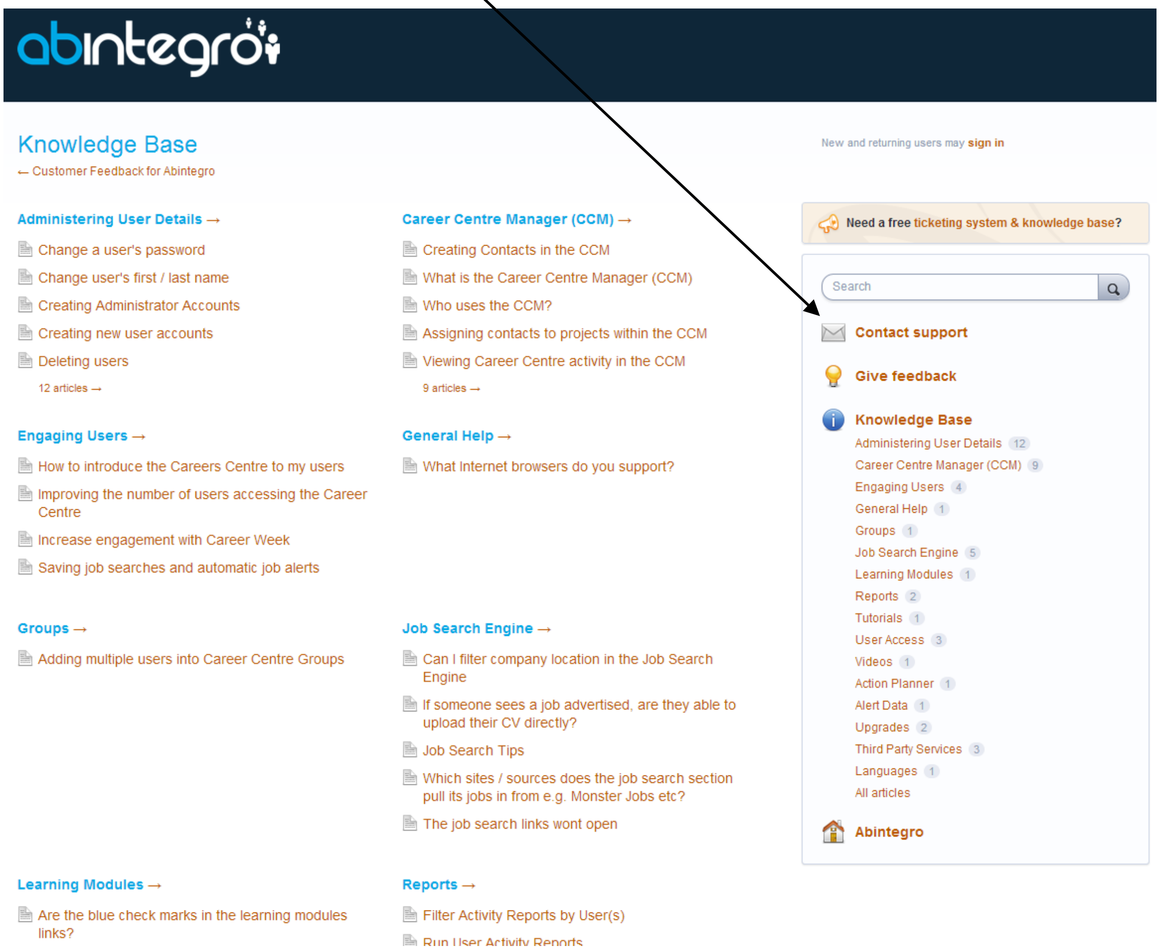
Long Visual Answer

To Access the Landing page of HELP information
Click on "search for help"



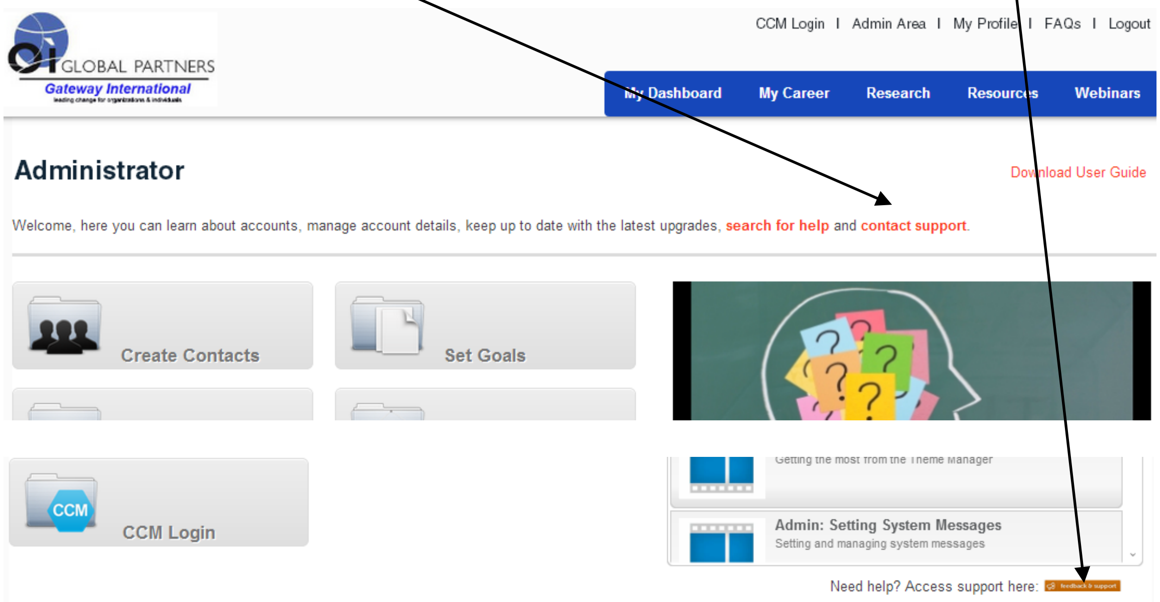
KNOWLEDGE BASE… HOW TO TOPICS

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

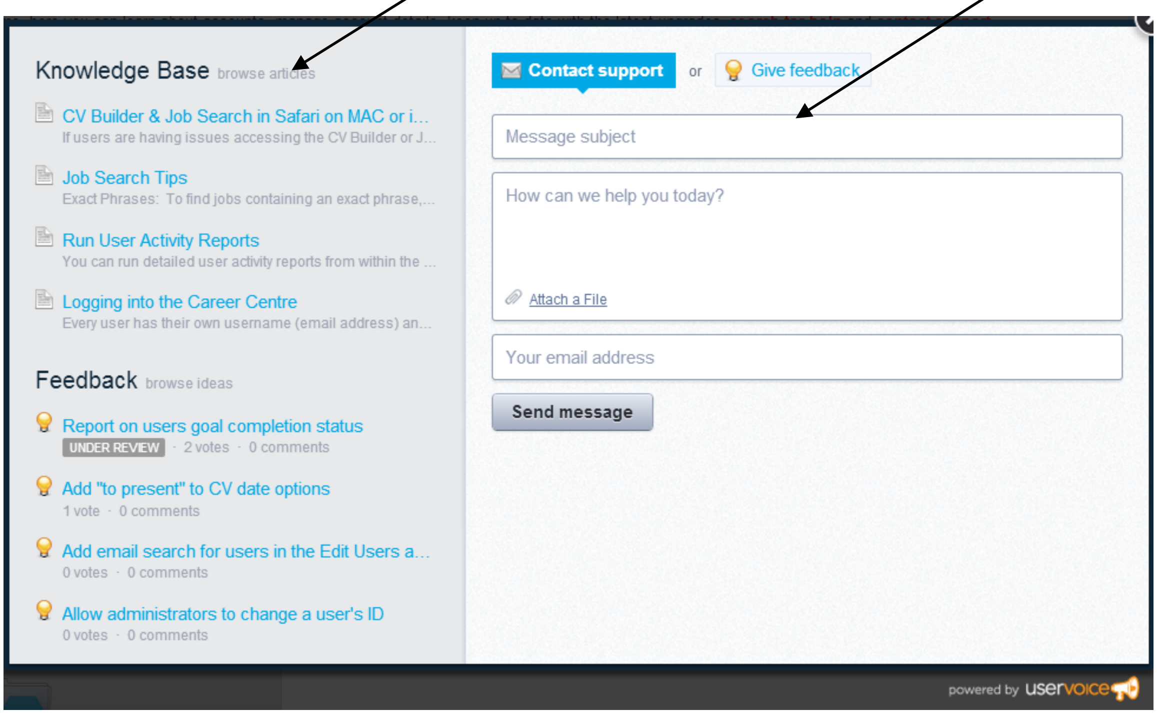


CONTACT SUPPORT

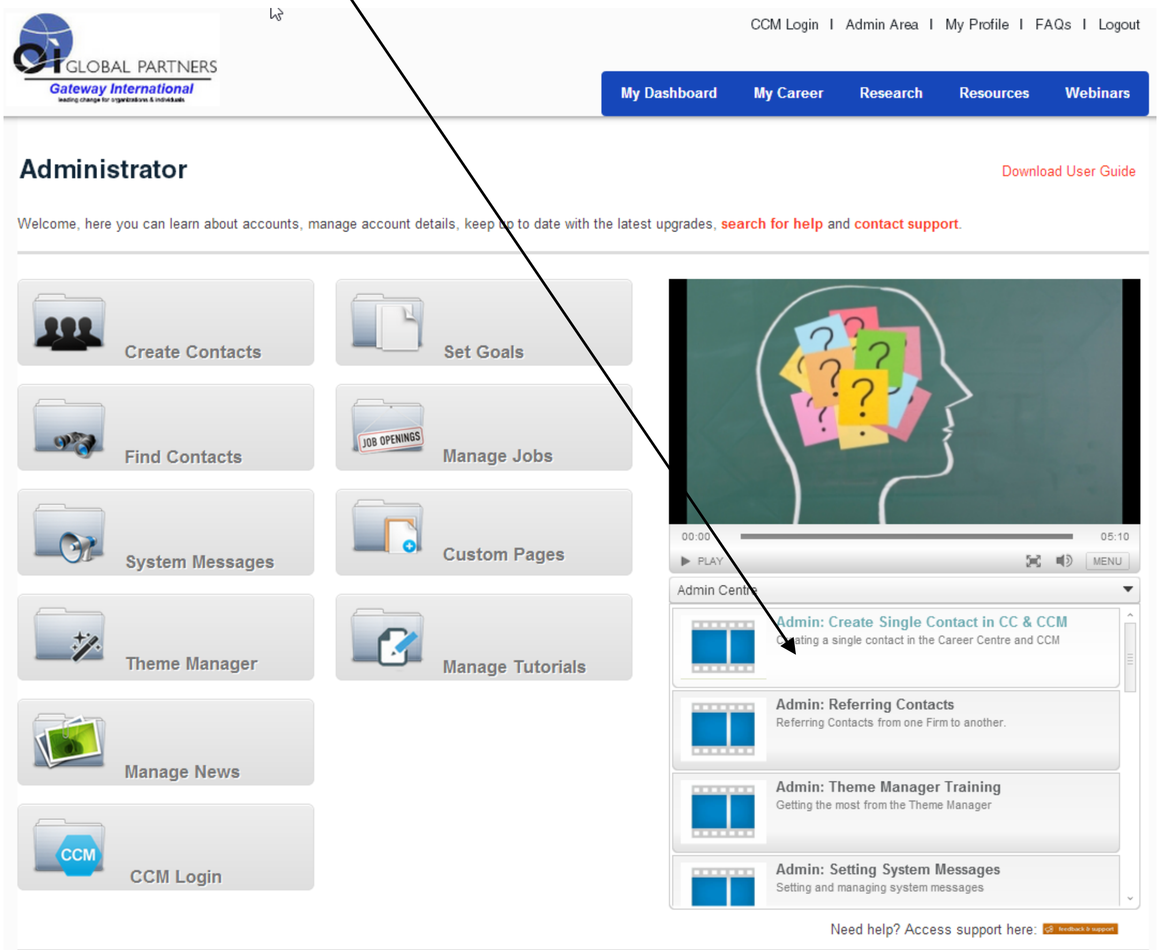
If you click on contact support from the top or the bottom of the Admin Page



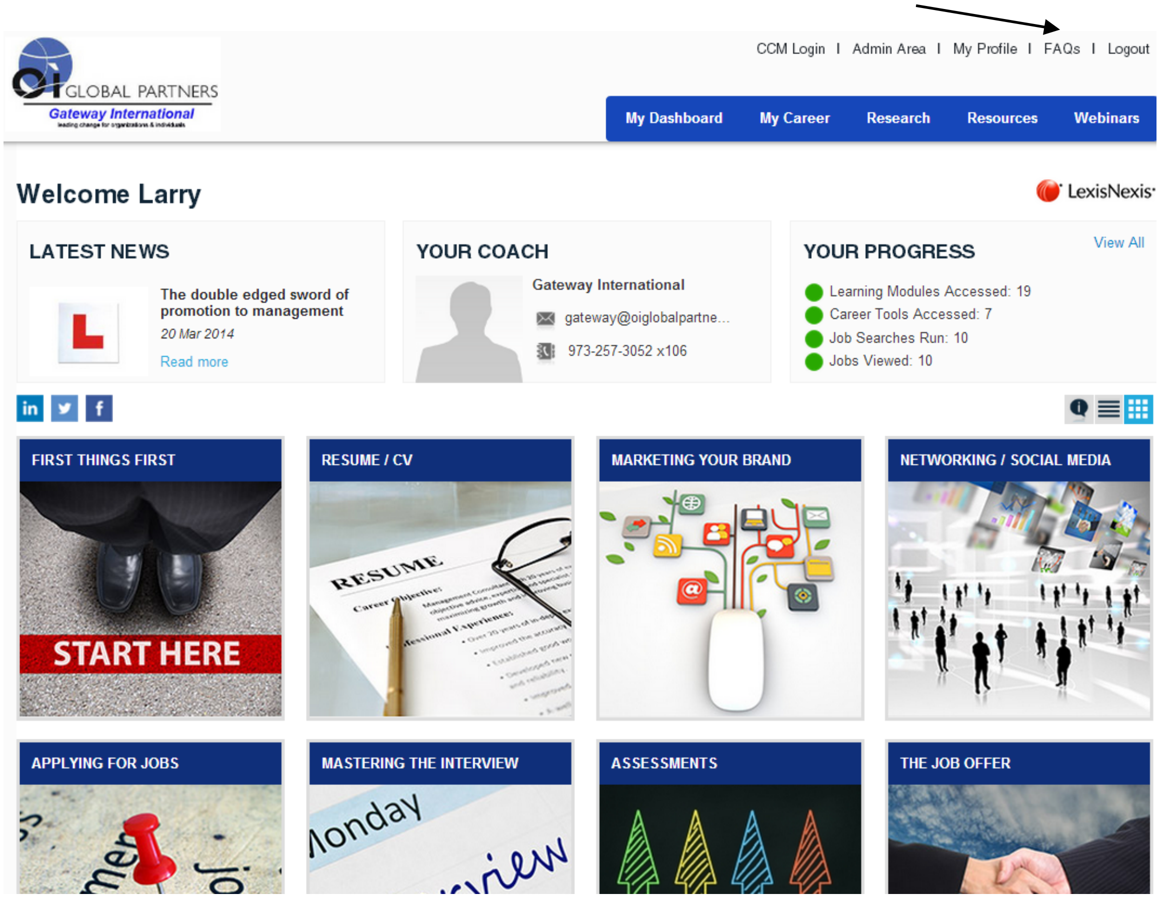
You will be able to search on the Knowledge Base "browse articles" or start an email to the support team at Abintegro



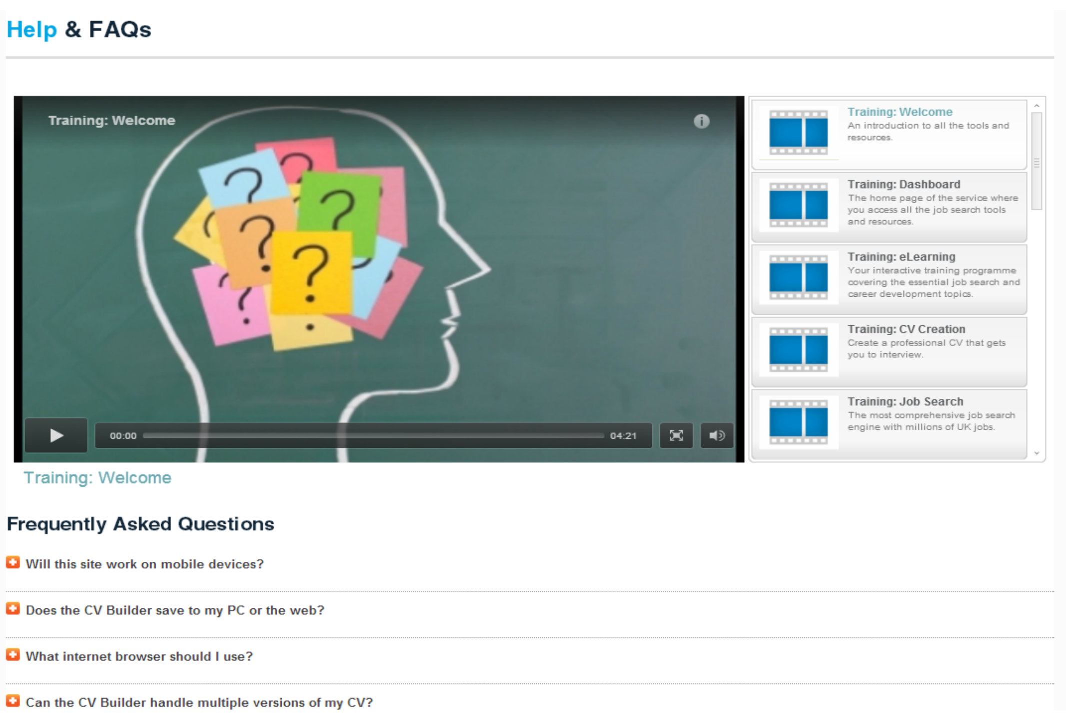
HOW TO VIDEOS
There are many HOW TO videos on a number of system functions on the Admin Page



FRONT END: QUESTIONS FOR CANDIDATES/COACHES - FAQS

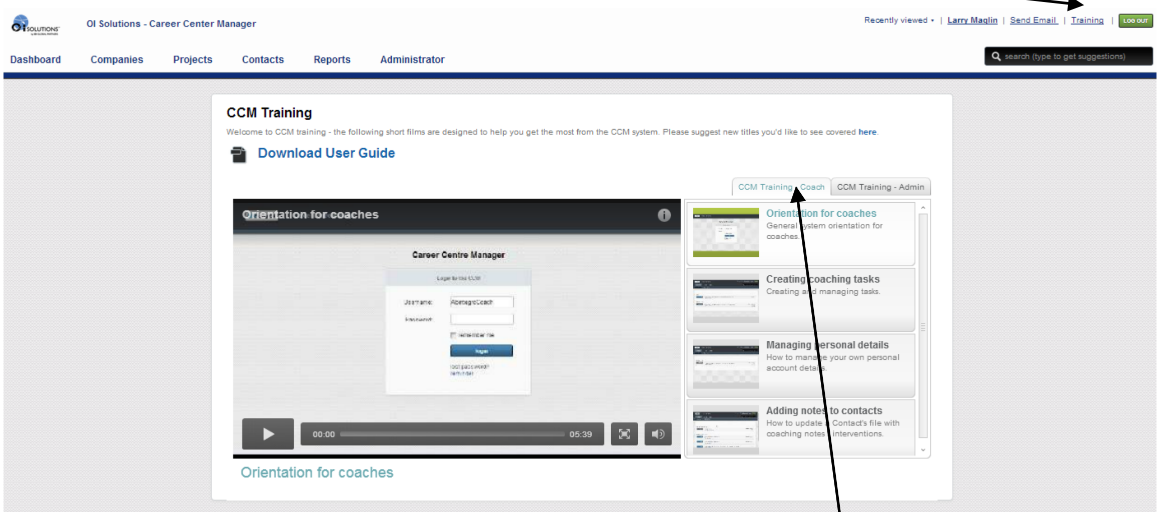


More help around the job search process and using the system's front end



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