User Management

ADDING/MANAGING YOUR USERS

Created: 17/03/17 (Version 4, MK: Amended 27/02/2018)
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Introduction

Our User Management guide contains all the essential information you need to independently add and manage your existing users on Talentlink.

This guide provides step by step instructions on how to;

Throughout the guide, you will see the following icons which indicate the WMJobs Team's recommendations which will help you with all your user management queries.

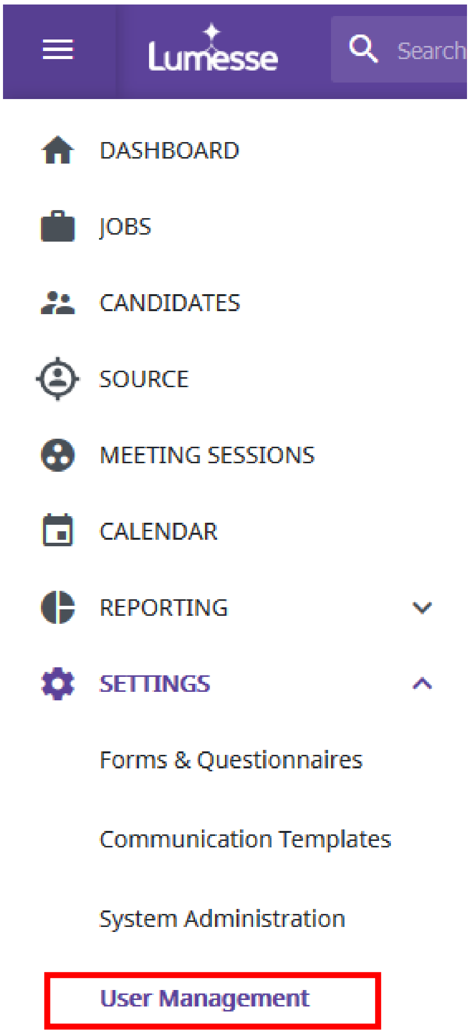
Top tips

Important Information

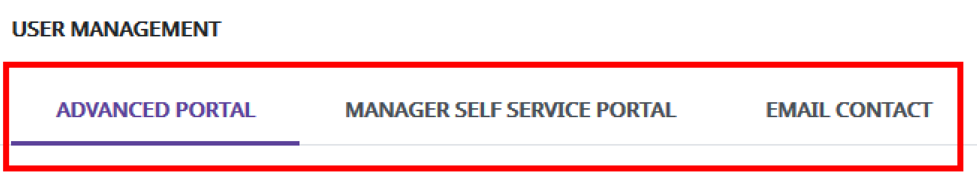
Best Practice

1. How do I add a new user?

Once you are logged into Talentlink, navigate to the left hand toggle menu and select '**Settings',** then **'User Management'.**



When you enter User Management, you will see three tabs which holds the three different types of user you can add to the system.



Advanced Portal – these are users who are typically recruiters that require greater access to view information on the system, for example, a member of your Recruitment Team. When a recruiter is created, they are automatically defaulted to the recruiting team when adding a job.

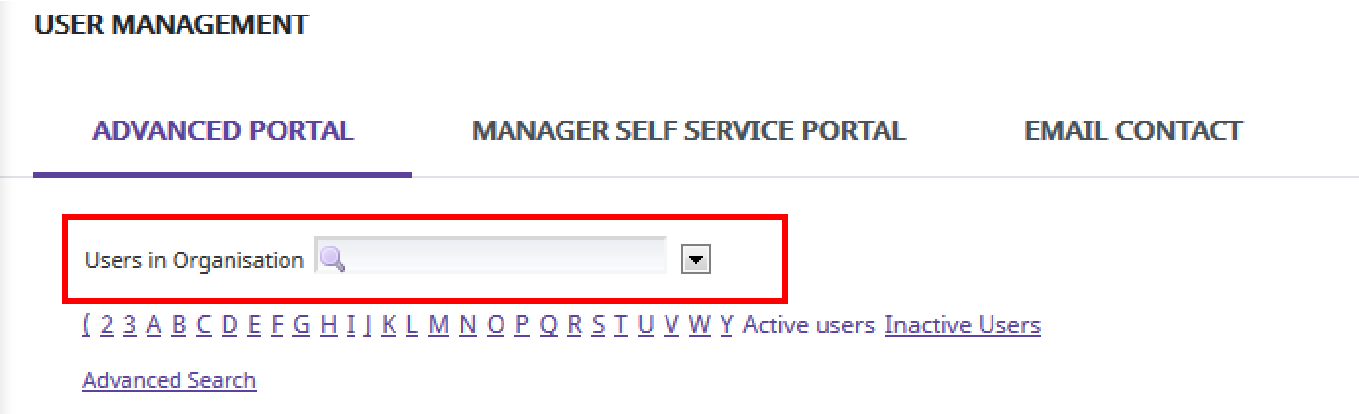
Manager Self Service – typically, this type of user is manager who independently accesses the system who should have access to their own vacancies when added to the operational team for a vacancy.

Email Contact – these are contacts who do not require access to Talentlink, but receive notifications from the system.

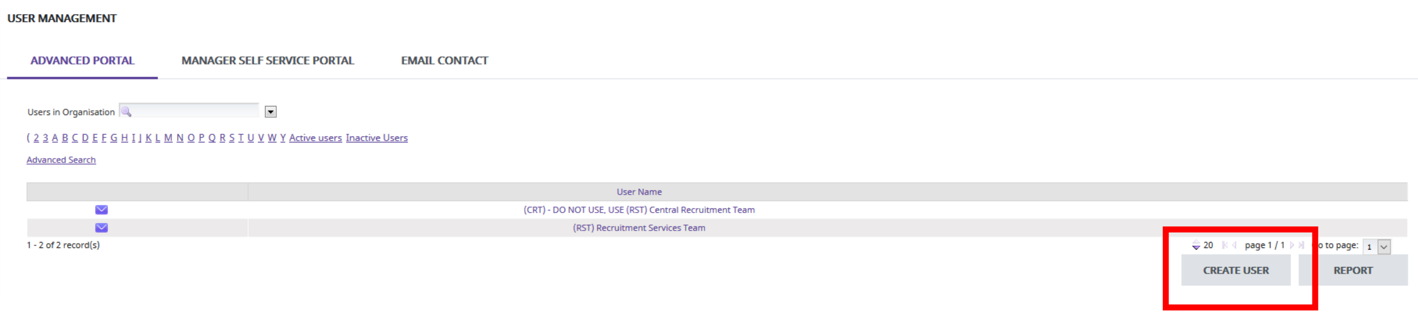
Select your organisation

Once you have established which type of user you want to create, you will need to select the relevant organisation you want the user to sit under - if you access to more than one organisation, you need to make sure that you select the appropriate organisation for your new user.

If you want your user to have access to more than one organisation

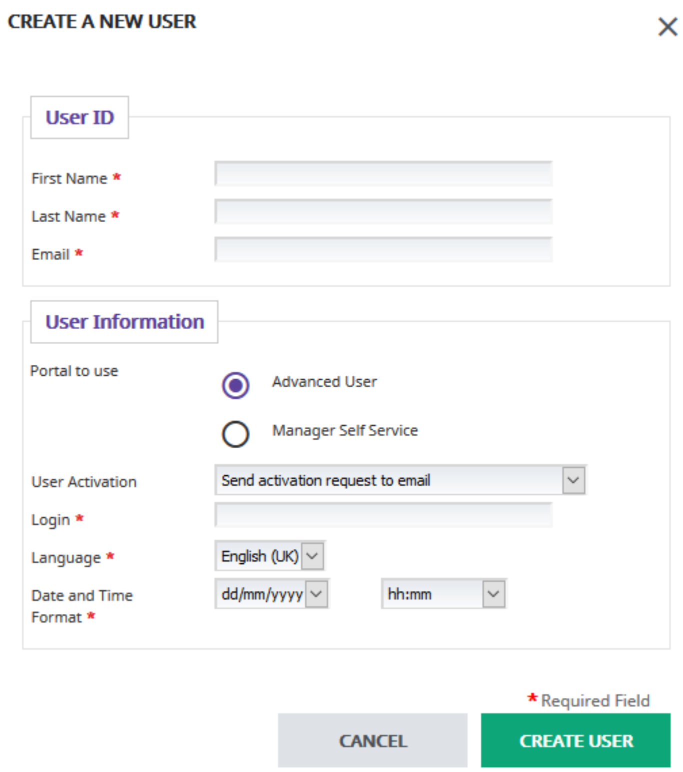


One you have selected your organisation, at the bottom of the screen, click '**Create User**'



Enter the details of your new user

A box will appear where you can enter your user's details.



There are two sections here – '**User ID'** and '**User Information'**.

User ID

Enter the details for;

1. **First Name**
2. **Last Name**
3. **Email**

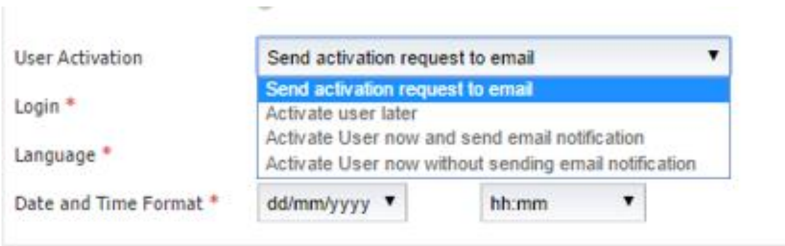
You will need to ensure that the email address for your user is correct, otherwise, your user **will not** receive emails sent from Talentlink.

User Information

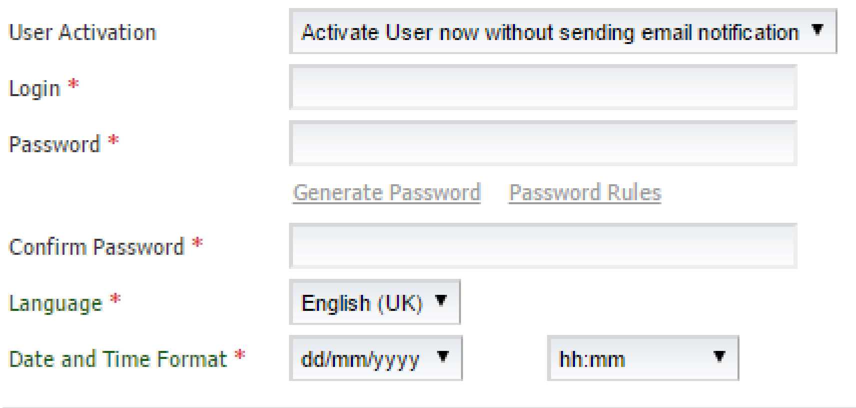
You will then need to select which portal your user will have access to.

To access the **Advanced Portal** choose 'Advanced User'. To access the **Manager Self Service Portal** choose 'Manager Self Service'.

User Activation - when creating a new user, you need to consider how they will receive their log in information such as their login name and password. Under 'User Activation' you will see several options on how your new user will receive this information:



We suggest that you select an option which activates your user – this allows you to set their login name and password



By selecting 'Activate User now and send email notification', this will send the login details to your new user automatically.

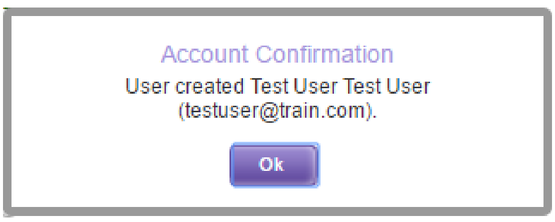
If you select 'Activate User now without sending email notification', this then gives you the opportunity to send the login details separately. This is something that you will need do manually do.

This is particularly useful if you want to provide the details after relevant training or training material have been provided. If you choose this option, **ensure that you make a note of the login and password provided to avoid confusion.**

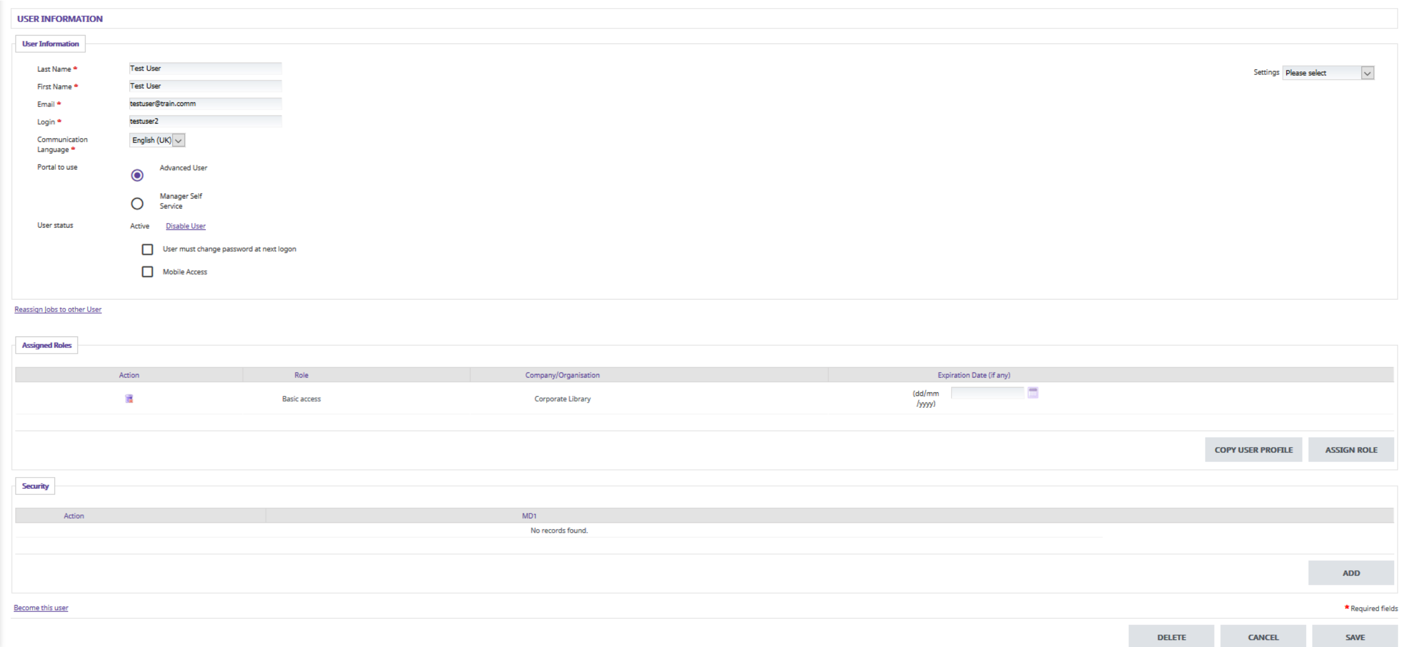
Once you have entered your Login and Password, all other details remain the same as per the screenshot. Once all fields have been completed, click '**Create User**'.

Confirm your new user's account

Once clicked, your will receive a confirmation on your screen that your user has been created, Click '**Ok**'.



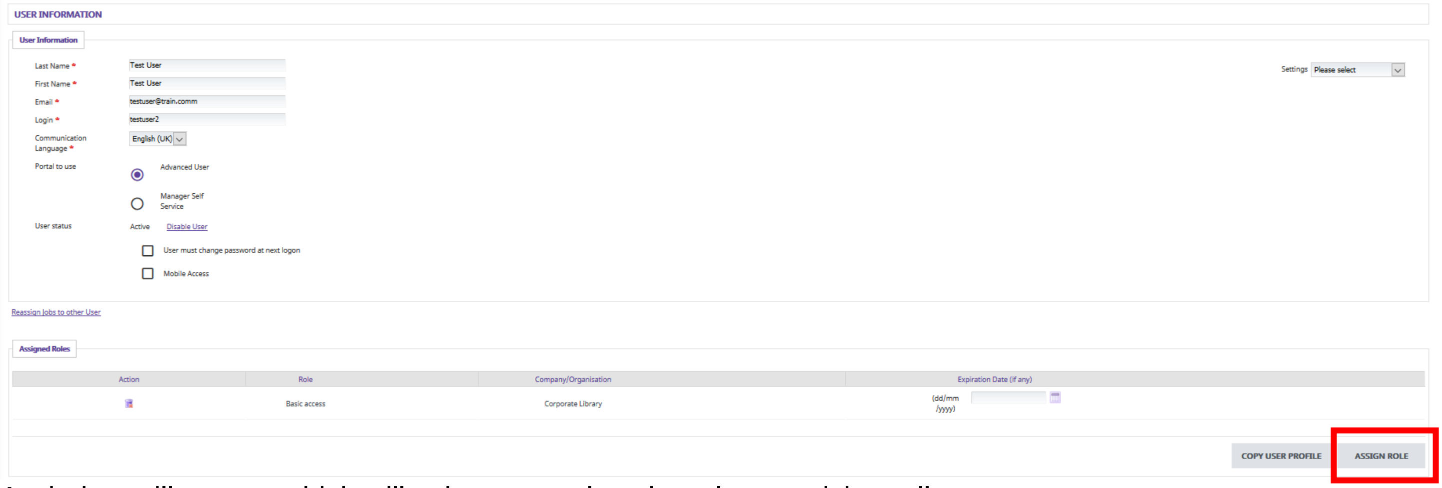
When you select, ‘Ok’, this will take you to your User Information screen for your newly created user:



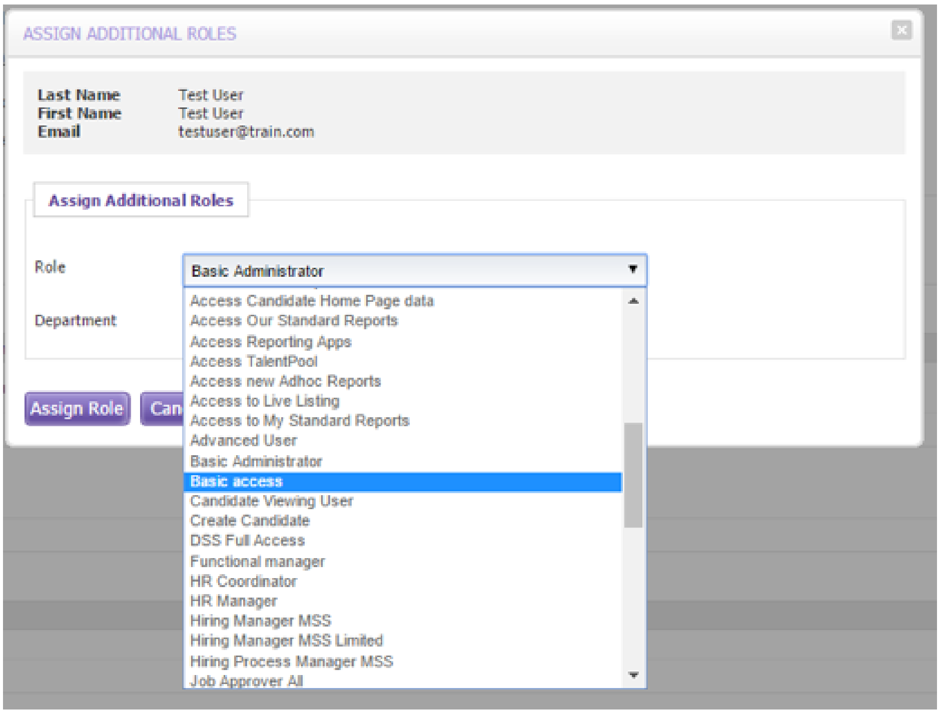
If this is not actioned, due to your security settings, if you move away from this screen **you will not be able to find your user within the system**.

2. How do I assign my user a role?

To assign a role, click '**Assign Role**';

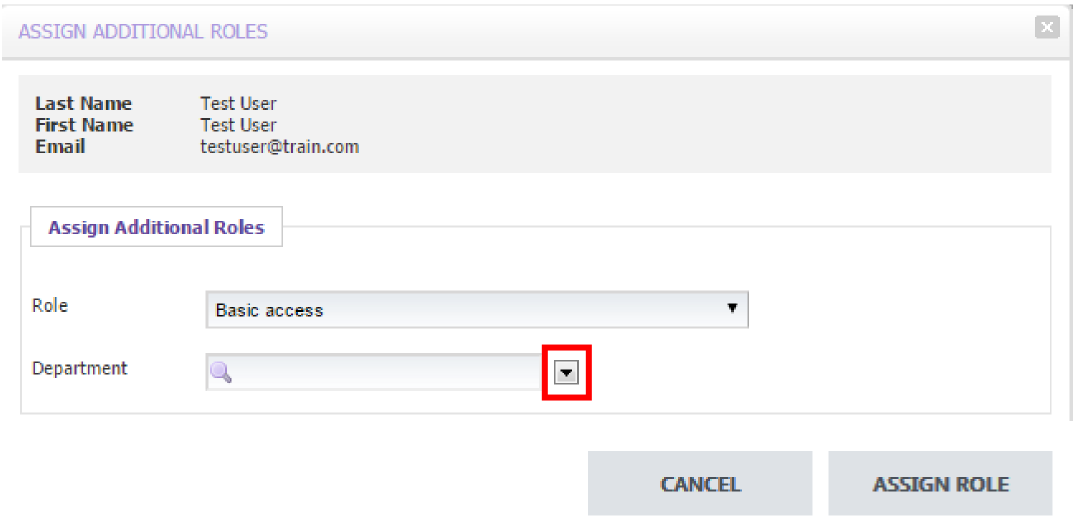


A window will appear which will ask you to select the role you wish to allocate:

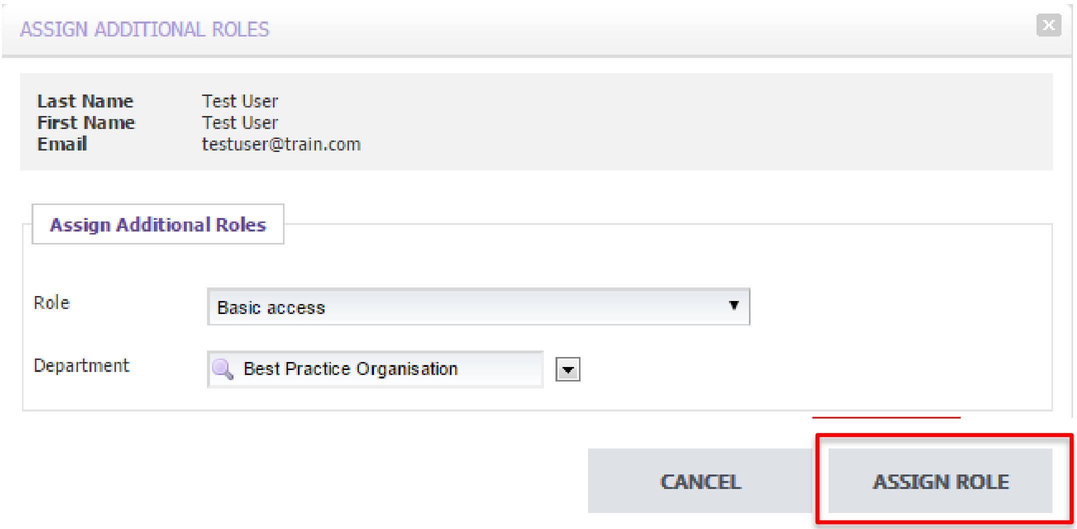


Select the role from the dropdown menu.

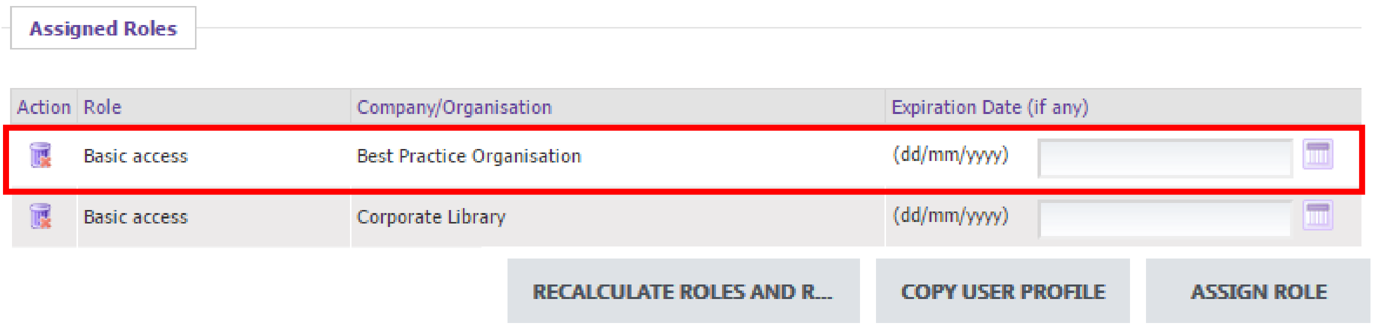
Then you will need to select which organisation this role applies to by clicking the arrow next to 'Department'. A drop down list will appear. Select your organisation.



When you have selected, click ‘**Assign Role**’.



You will then see the role you selected appearing on your User Information screen for the user:

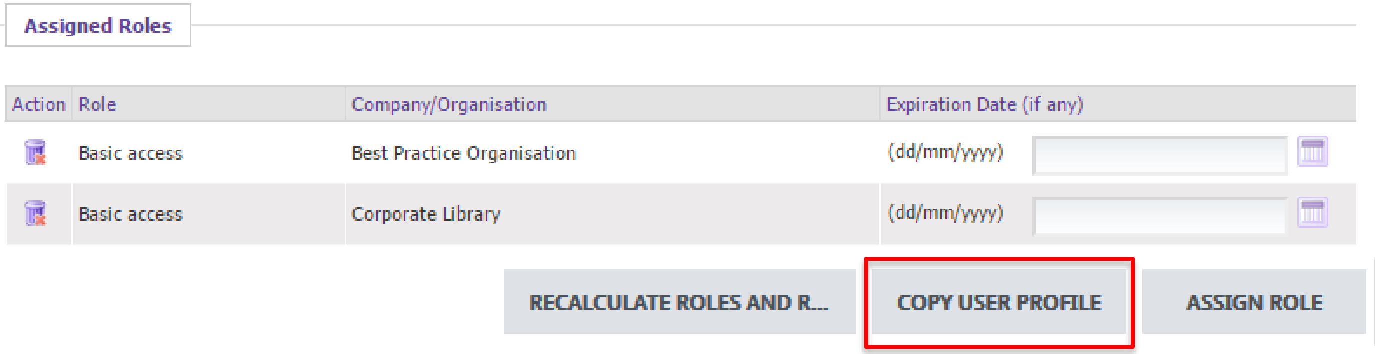


You have allocated a role for your user!

It’s important to note that the system only allows you to allocate roles to a user **one at a time for each organisation**. To make allocating roles more manageable, Talentlink does have a functionality which allows you to copy the roles of an existing user within your system.

3. How do I copy another user's roles?

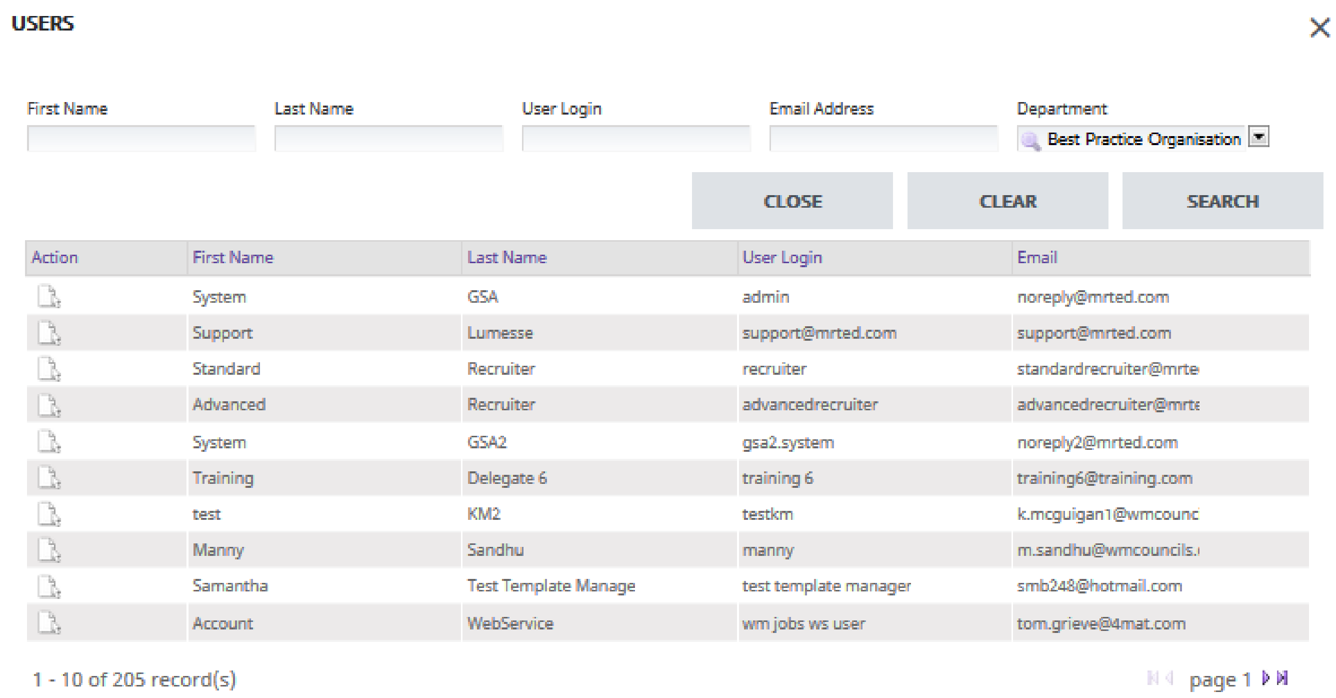
To copy the roles of an existing user's profile, under the 'Assigned Roles', click '**Copy User Profile**':


Assigned Roles

Action	Role	Company/Organisation	Expiration Date (if any)
	Basic access	Best Practice Organisation	(dd/mm/yyyy)
	Basic access	Corporate Library	(dd/mm/yyyy)

RECALCULATE ROLES AND R... | COPY USER PROFILE | ASSIGN ROLE

A box will appear which will show you all the users in your system that you are able to copy.


USERS

First Name | Last Name | User Login | Email Address | Department: Best Practice Organisation

CLOSE | CLEAR | SEARCH

Action	First Name	Last Name	User Login	Email
	System	GSA	admin	noreply@mrted.com
	Support	Lumesse	support@mrted.com	support@mrted.com
	Standard	Recruiter	recruiter	standardrecruiter@mrte
	Advanced	Recruiter	advancedrecruiter	advancedrecruiter@mrte
	System	GSA2	gsa2.system	noreply2@mrted.com
	Training	Delegate 6	training 6	training6@training.com
	test	KM2	testkm	k.mcguigan1@wmcounc
	Manny	Sandhu	manny	m.sandhu@wmcouncils.
	Samantha	Test Template Manage	test template manager	smb248@hotmail.com
	Account	WebService	wm jobs ws user	tom.grieve@4mat.com

1 - 10 of 205 record(s) page 1

You can navigate through the pages to find a user, or alternatively, you can search for a specific user by entering their details in the above fields and selecting '**Search**'.

You don't have to complete all the fields to search for a user – you can search by first name or last name or email

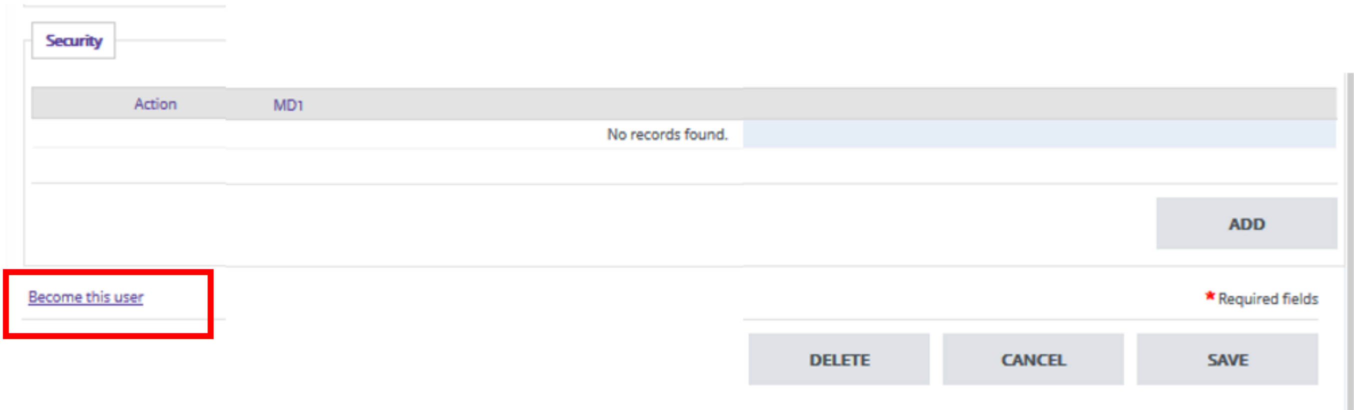
Once you have found your user, to select their profile to copy, click the document icon under '**Action**'.

	Action	First Name	Last Name	User Name	Email Address
		Simon T	Testman	test viewing user	testman@wmcouncils.org.u

You will then be taken back to your User Information screen, and you will see the new roles that have been allocated.

We recommend that you **check the roles** to ensure that your user has the correct access to the system.

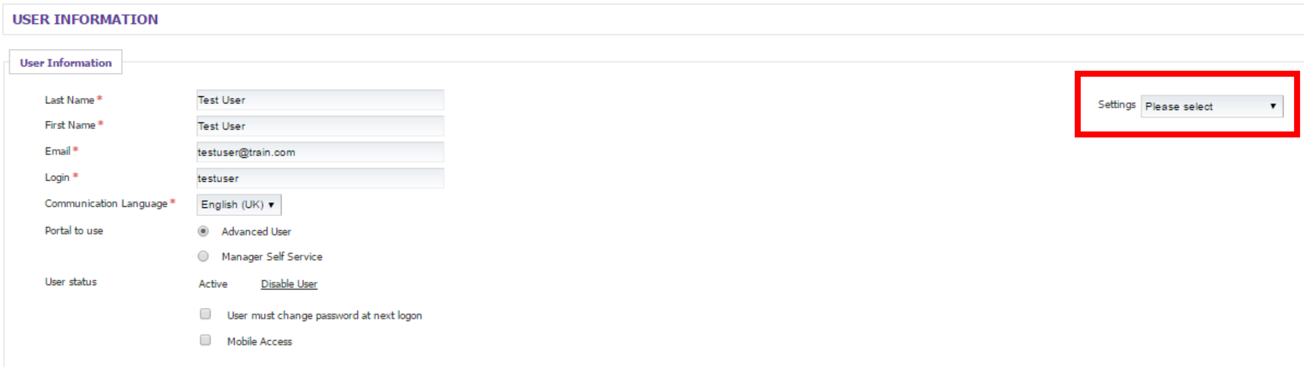
If you are a Local System Administrator, you are able to ‘Become this user’ by selecting the option at the bottom of the screen. Here, you will be able to test you user’s access and is a good way to ensure the role’s you’ve assigned are correct.



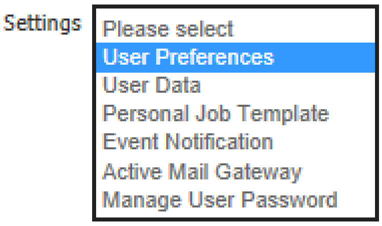
4. How do I manage my user's settings and passwords?

When adding a user to the system, it's important to check your user's settings to ensure your user will be able to use the system fully without experiencing issues.

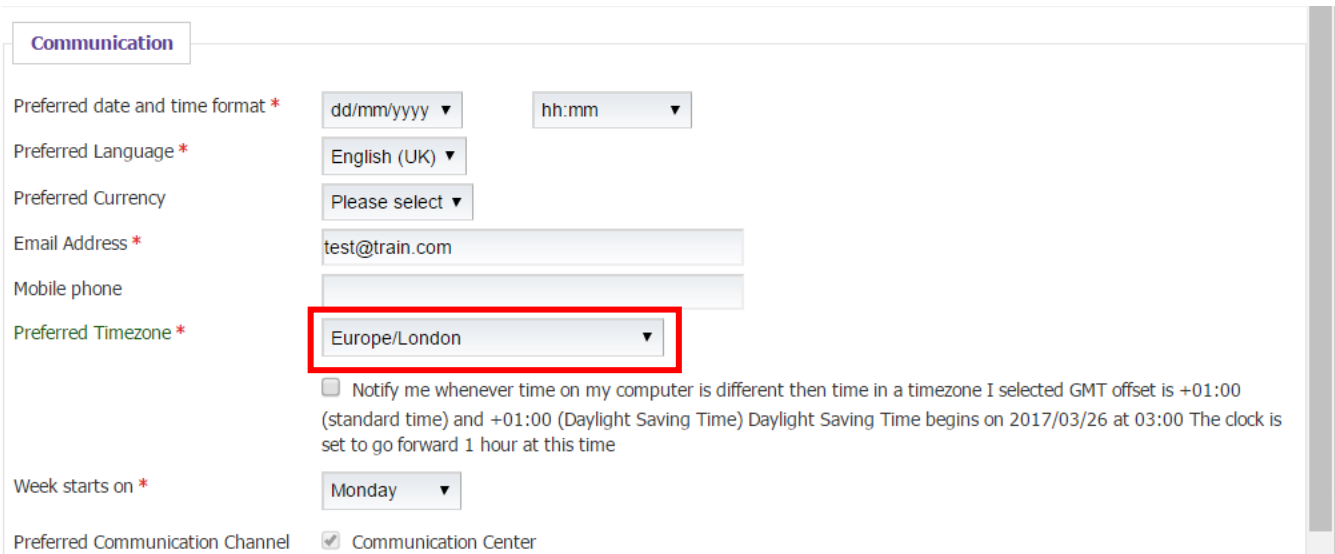
On the User Information management screen, on the right, you will see the dropdown '**Settings**'.



If you click the dropdown, you will see several options. Select 'User Preferences'.



Here, you will need to check the 'Preferred Timezone' for your user. This should be defaulted to '**Europe/London**'.



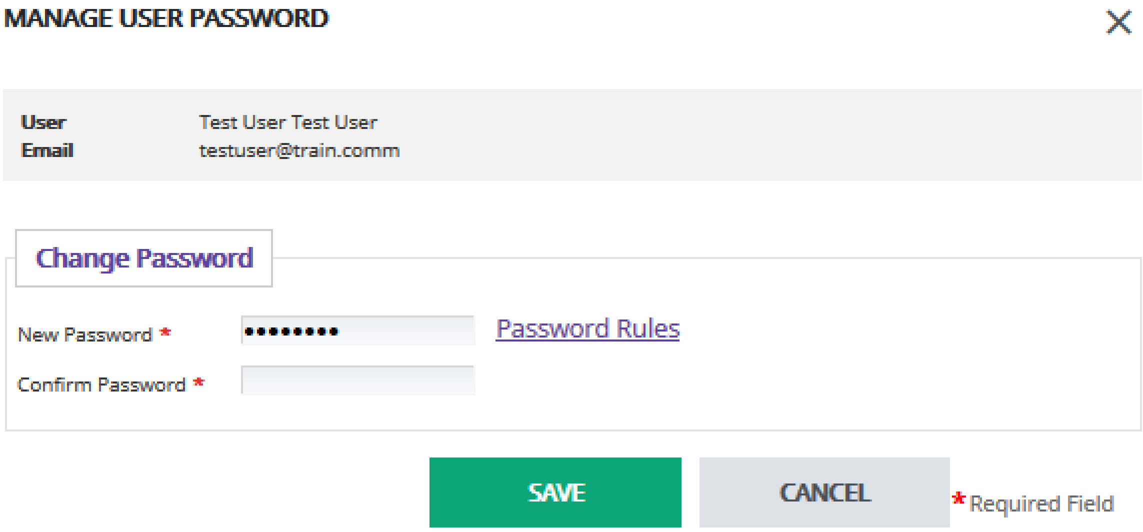
If this is different, select the correct option and click '**Save**'.

It's important to check your user's time zone. If your user's time zone is incorrect, this will affect your times when sending interview invites to candidates as the times will be different.

Password Management

Within settings, you can re-set the password for a user within the system.

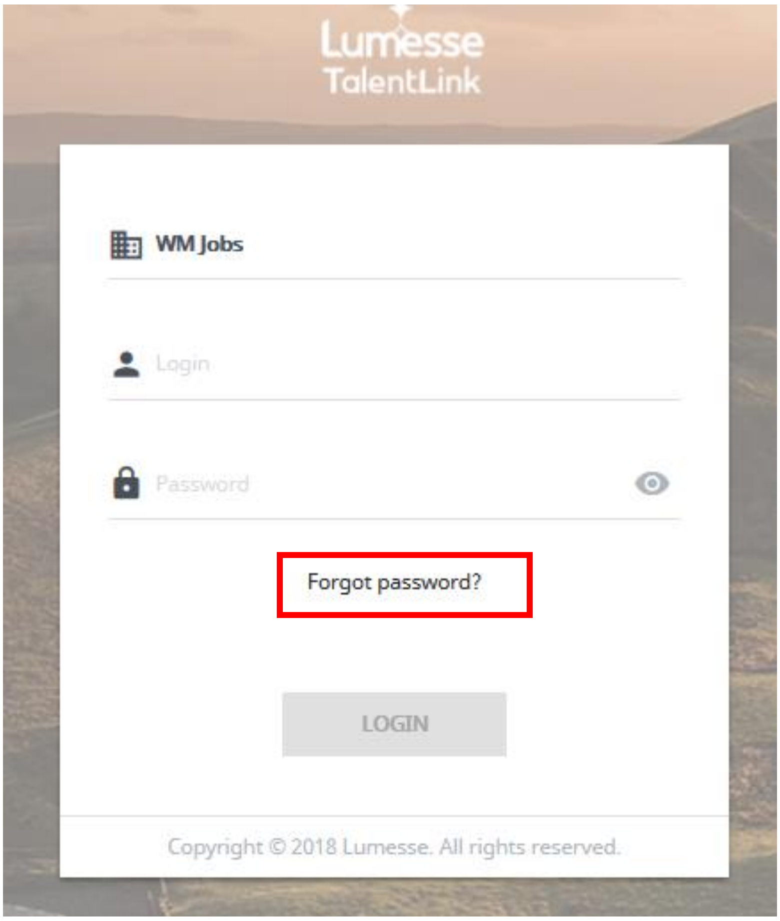
To do this, under ‘**Settings**’, select **‘Password Management**’.



You will then be able to enter a new password for your user. ‘Password Rules’ will tell you what the format the system allows for new passwords.

Once you have re-set, click ‘**Save**’.

As good practice, before re-setting the password, your user can ask for a new password through the ‘**Forgot password**’ option via the log-in screen on Talentlink.



When a user selects ‘Forgot password’, they will be asked for their Company Name and E-mail:

PASSWORD MANAGEMENT

Forgot password?
In order to authenticate who are you, we must send you an email to the email address provided for your account.
In this email you will find a link you must click to authenticate.
The Company Name is case sensitive.

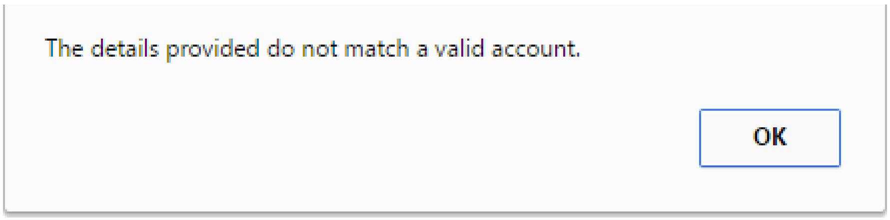
Company Name:

E-mail:

SUBMIT CANCEL

Company Name refers to the **Company Name they use to log-in to Talentink** which would be ‘WM Jobs’. This can sometimes be mistaken for the organisation that user works for, so if this is entered incorrectly, it will not allow your user to re-set their password.

If any details are entered incorrectly, your user will receive the following validation error message;



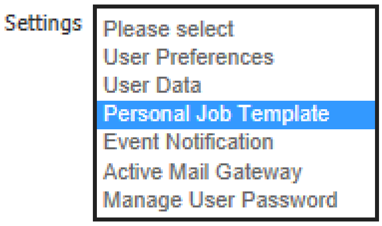
You will need to ensure your user is entering the correct Company Name and E-Mail to receive a password reset. Also, please check encourage users to check their **junk mail** folder.

5. Creating a Personal Job Template for a user

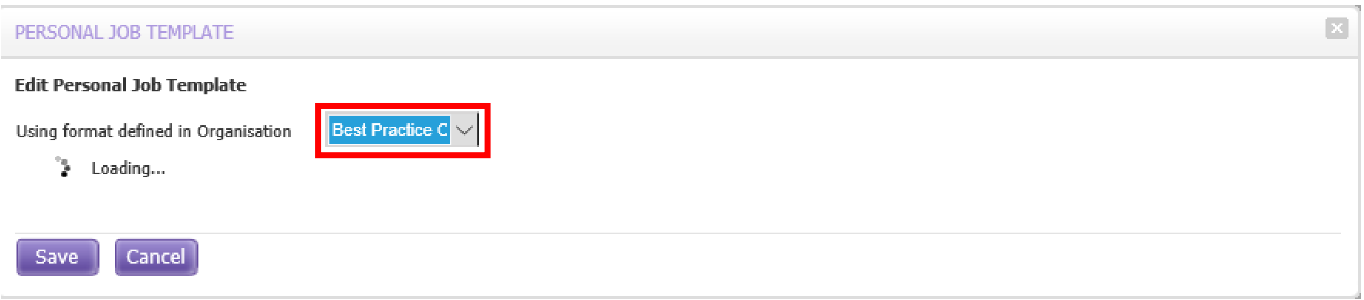
As part of User Management, you can create Personal Job Templates.

This allows you to pre-set the values in fields available on the job requisition page for any user who creates job vacancies within the system. This means that every time that user creates a post within Talentlink, fields will be pre-populated with the information you determine in ‘Personal Job Template’.

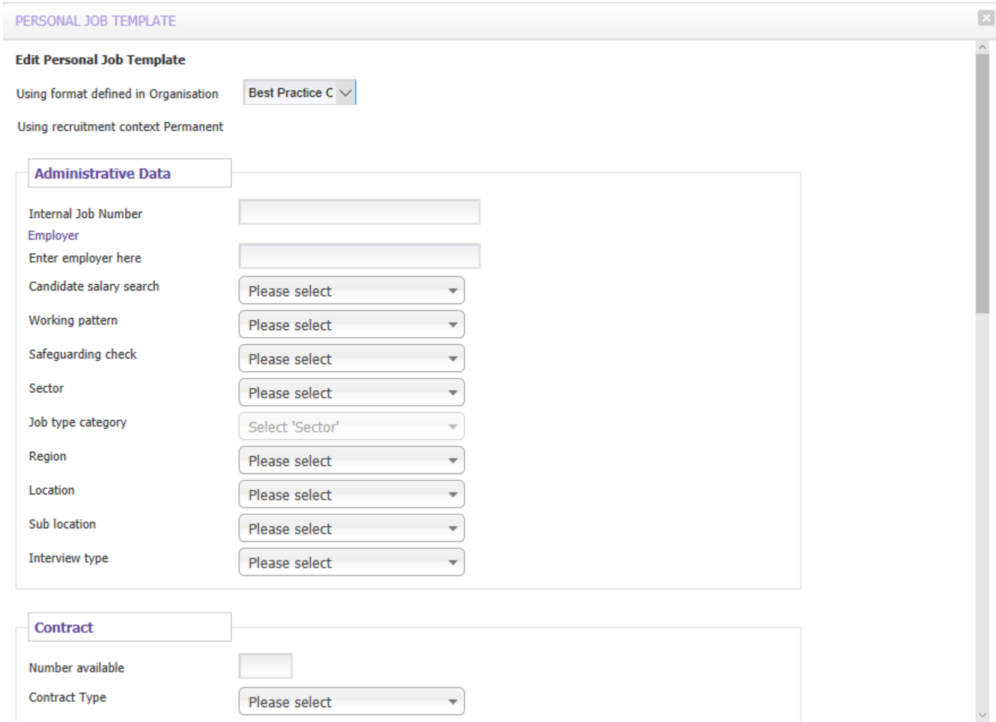
To populate a user’s Personal Job Template. under **‘Settings’** on the User Information management screen, select ‘**Personal Job Template**’ from the dropdown menu;



You can set your user’s Personal Job Template for different organisation’s they have access to – select the relevant organisation and wait for the page to load;

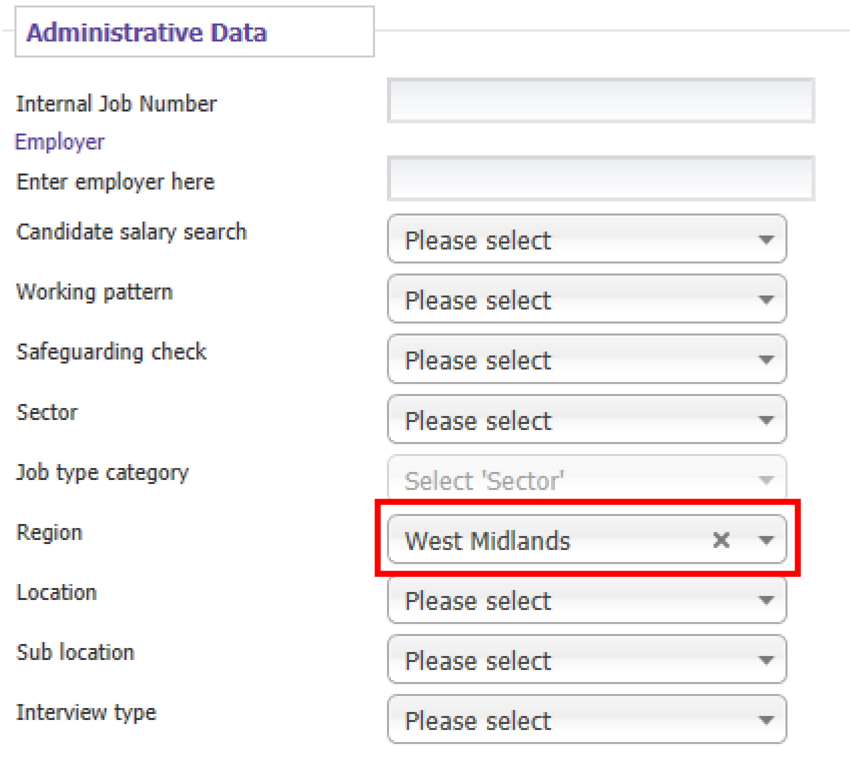


Once the page has loaded, you will then see the standard job requisition fields for the organisation that you chose;

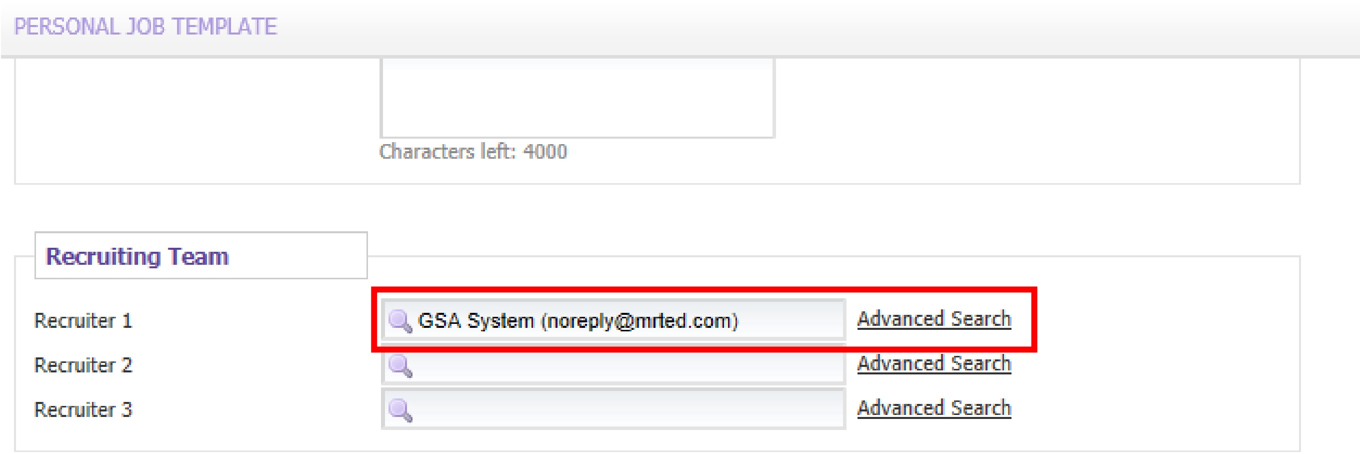


You can then enter data into the fields or choose options from your drop-down menu which will be set as a standard every time this user creates a new job vacancy.

For example, if the 'Region' for your adverts will always be 'West Midlands', this can be set as a standard;



You can also select members of the Recruiting, Operational and Approver Teams as a standard;



This can be particularly useful if you are setting Personal Job Templates for your MSS users – you can include your MSS user in the Operational Team of their vacancies so they are notified of their vacancy activity in their Manager Workspace.

Once you have made your changes, scroll to the bottom of the screen and click '**Save**'. Your user's Personal Job Template is now set.

6. Troubleshooting/FAQ's

I can't find a user on the system

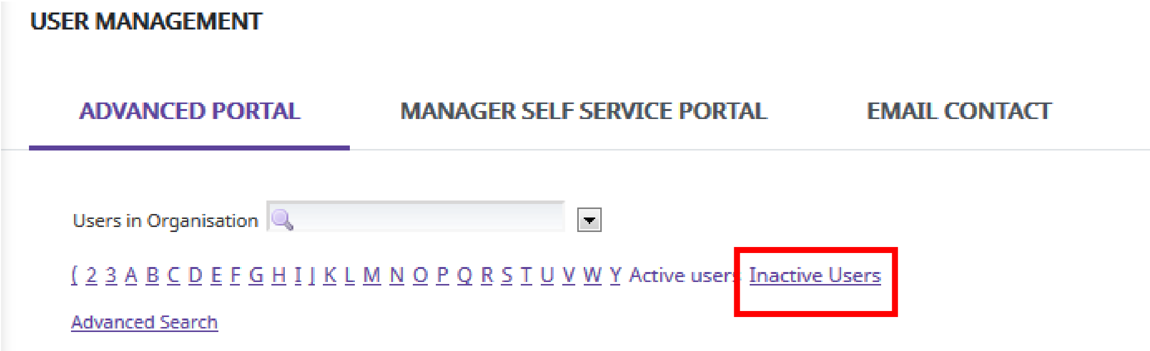
There are several factors that could affect you finding a user within the system. We have outlined a list below of things you need to consider;

What type of user you are trying to find
When searching for a user, you need to make sure that you are searching under the correct user portal. If, for example, you are trying to find an advanced user, you to make sure you are searching under the **Advanced Portal** tab on your User Management screen.

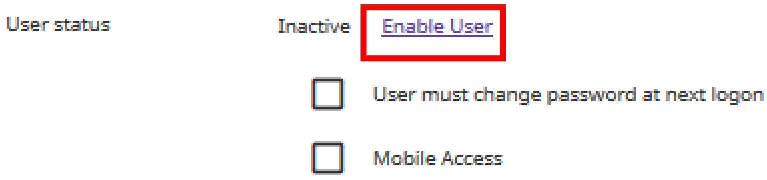
Also, there could be a possibility your user has been inputted incorrectly, therefore, it is best to check all tabs if you are still having problems finding your user.

What organisation the user sits under
If you have filtered your search by 'Organisation', does this user sit under this organisation? Search each organisation if you are unsure.

If the user is still active
If a user has been disabled, they will not appear in the 'Active users' list – they will appear as 'Inactive'. You can search inactive users, by selecting 'Inactive' on the User Management screen.



If the user you are searching for is 'Inactive', you can re-able them by clicking into their profile and under 'User Information', click 'Enable User'



The criteria being used to search
If you are using 'Advanced Search' to find your user, you may need to think about the criteria you are using to search.

If the user's email address has been entered incorrectly on the system, if you are just trying to find your user by their full, correct email address, the user won't appear on your search.

If you are having trouble finding a user, you can enter part of a name or email address to narrow down your search.

I'm trying to add a user and an error message appears to say the user already exists

If you are trying to enter a user and their email address already exists in the system, you will receive this message. You will need to follow the steps outlined in the previous question to find your user and amend the details that you need to.

You may need to carry out an extra search under the tab 'Email Contact'. If you need at add your user as an Advanced of Manager user and they already exist in 'Email Contact', you will need to **delete** your contact as they will now have access to the system, once they are set up.

A user has forgotten their password. What do I do?

You will need to advise them to use the 'Forgot password' function on their login page or reset their password. See **pages 13 and 14.** Passwords are a function that should be managed locally.

I'm not sure what roles to allocate a user

You can copy the roles of a user who already exists in the system by following the guidance on **pages 10 and 11.**

Alternatively, you can log onto the Service Centre and access the **roles and rights matrix** on the solutions tab which will outline all the roles on the system along with the rights that are associated with that role. This may help if you are specifically trying to allocate a role to perform a certain task.

You could also take a look at the **standard user guides** on the Service Centre which may give you further guidance on the types of standard users there are on the system and what tasks they can perform.

You can now add and manage users!

We have outlined in this guide the essential information you need to add and manage your Talentlink users.

We understand that User Management can be a complex topic, so to assist further, we have created several resources for you to use which sit on the **Solution tab on the Service Centre** to help you allocate roles to your users.

You can visit the Service Centre at http://wmemployers.freshdesk.com/helpdesk

We have included;

Roles and Rights Matrix – this outlines each of the roles and what rights are attached to that particular role, i.e. what your user will be able to view/action on the system.

Standard User Guides – these outline the standards rights and roles for your typical users, which include;

Local System Administrators
Managers
Recruiters

We also have guides which outlines the standard roles you need for:

Reporting
Workspace Management

User Management is a short module featured in our **Open House Configuration Training**. If you or any colleagues are interested in attending an open house training session, please contact the team who will be able to provide you with further information.