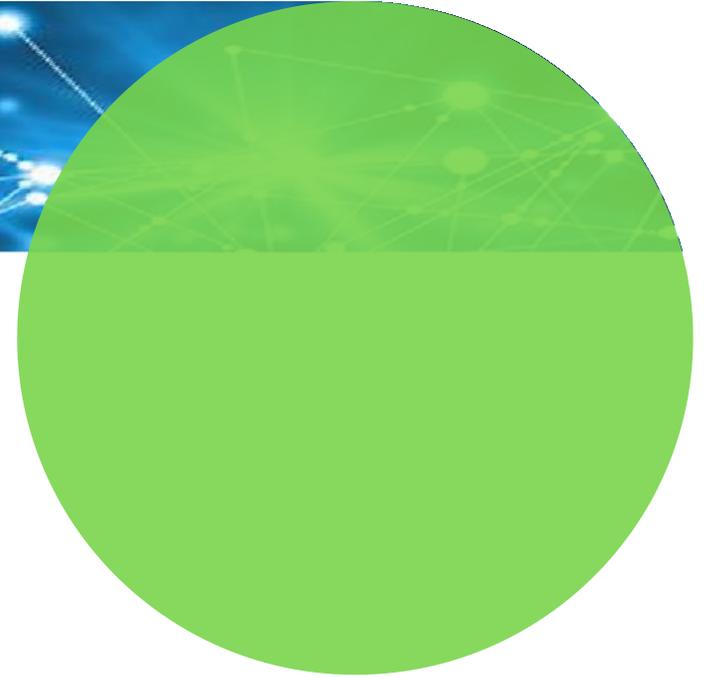


User Manual:



Introduction

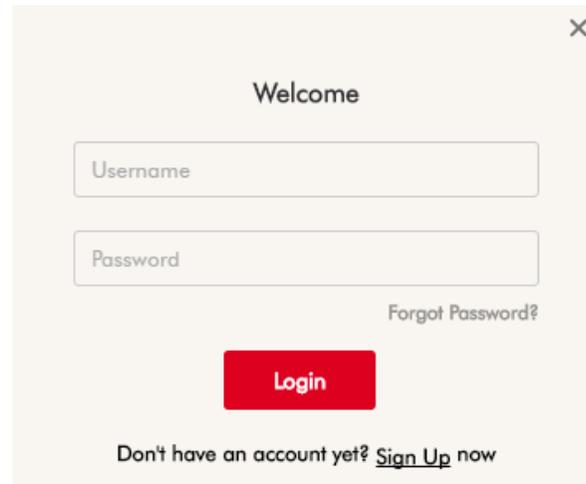
- This document defines the user manual for using AMCAT Recruiter's portal for administering tests to candidates, inviting new applicants to appear for tests, manage invited candidates. Following slides cover the typical recruiter flow on the portal
- AMCAT is a platform developed by Aspiring Minds, which is a company within the SHL Group. In that regard, while the platform is badged as Aspiring Minds, you are using SHL product, supported by SHL
- Throughout the document, possible actions on each page have been identified on the page screenshots using a legend. Each numbered legend represents a possible action which has been explained in detail on subsequent slides

Index

- Login
- Dashboard
- Create Assessments
- My Assessments
- Schedule Assessments
 - Single Scheduling
 - Bulk Scheduling
- Candidate Details
- User Management

Accessing the portal and Login

- The AMCAT Recruiter's Portal can be accessed at the following URL
[“https://www.employer.aspiringmins.com/”](https://www.employer.aspiringmins.com/)
- Please use Chrome 50 and above / Firefox 40 and above browser to access the portal
- Click on “Login” and enter login credentials provided to access the account.



Welcome

Username

Password

[Forgot Password?](#)

Login

Don't have an account yet? [Sign Up](#) now

- Successful login would redirect the user to the account Dashboard, which presents a summary view of the usage for particular period.

Dashboard (1/2)

The screenshot shows the Aspiring Minds dashboard interface. At the top left is the logo 'aspiringminds'. The top right navigation bar includes 'Account Summary', 'Demo MIS', and a user profile icon. A left sidebar contains navigation items: 'Assessments', 'Create Assessment', 'My Assessments', and 'User Management'. The main content area is titled 'Dashboard' and features a filter section with 'User' set to 'Demo User' and date filters for 'From 11-02-2019' and 'To 11-05-2019'. Below this are six summary cards: 83018 SCHEDULED, 4642 COMPLETED, 755 STRONG CONSIDER, 29 IN PROGRESS, 62995 EXPIRED, and 15352 PENDING. A central banner advertises a 'Sales Situations Test' with an 85% increase in target achievement. To the right is a promotional banner for 'Aspiring Minds' with a 'SCHEDULE DEMO' button. At the bottom is a search bar for 'Create new assessments'.

3 (Callout to the left sidebar navigation menu)

2 (Callout to the summary cards)

1 (Callout to the date filter section)

1

The assessment statistics on the dashboard are displayed for the selected date range.

E.g. If user selects date range (From: 11th Feb 2019 to 11th May 2019), then the dashboard will display all the assessment usage and candidate statistics for this selected date range.

2

The user gets an overview about the account by looking at the assessment statistics provided in 6 tiles. Each section (tile) has been explained in detail below.

a) Scheduled: Total number of candidates that have been scheduled across different assessments within the selected date range

b) Completed: This tile represents number of candidates who have completed the test within the selected date range.

c) In Progress: Number of candidates who are currently taking the test (i.e. their test is in progress within the selected date range).

d) Pending : Number of candidates who are yet to start their test within the selected date range.

e) Expired : Number of candidates, who did not attempt the test within the stipulated timeframe within the selected date range.

f) Strong Consider: Number of candidates who have completed the test and cleared the cut off set for that assessment.

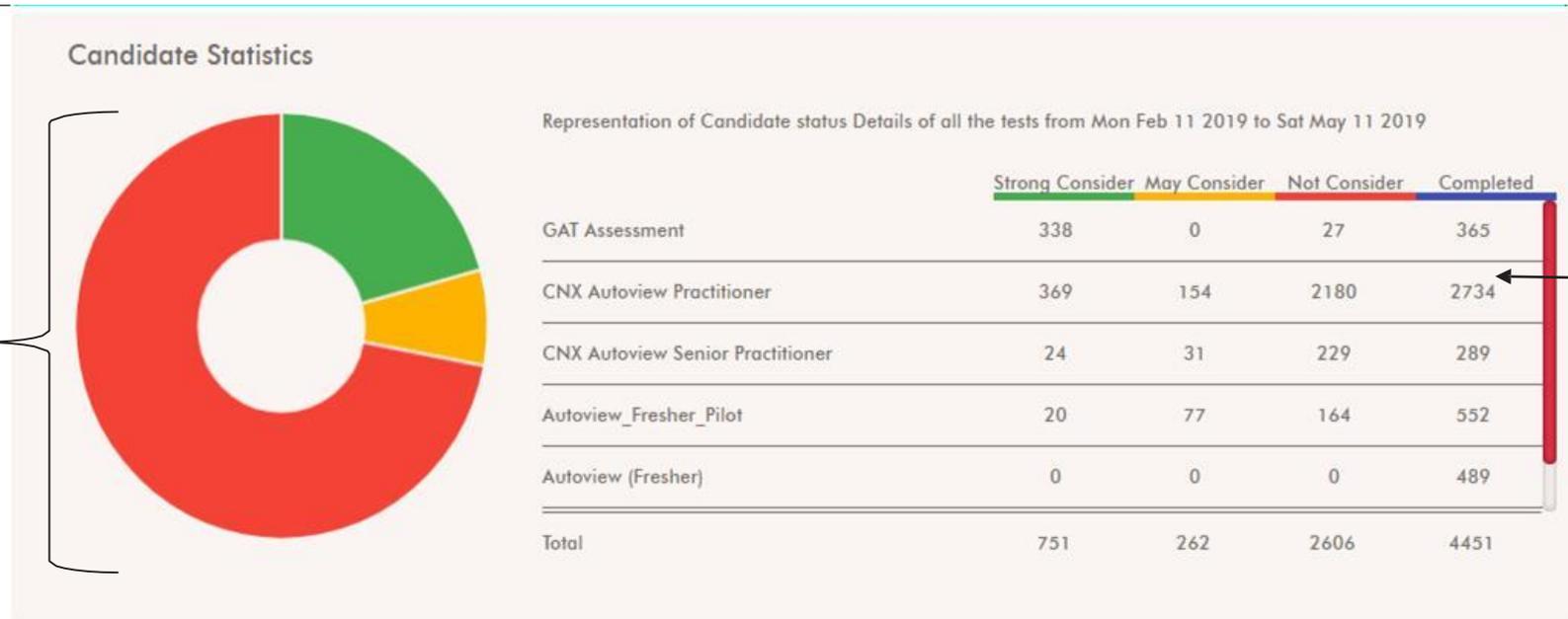
1. Menu Options:

A. Assessment

- i. *My Assessments* : Click here to view list of all the assessments created by you OR the assessments created by other users that have been marked as visible to you. User can perform following functions on the assessments under this category:
 - a) Schedule candidates to take assessment and send them the login credentials to attempt the test
 - b) View details/scores/reports of the candidates who have completed the test

Note: The Menu options visible to a user may differ on basis of the role/permissions assigned to that user. e.g. The option to “*User Management*” will not be active for a user who does not have the permission to create a test.

Dashboard (2/2)



A bracket labeled '3' groups the following four candidate cards:

GAT Assessment

Tests: Semi Tech, Numerical Ability, Grammar, Logical and Analytical Reasoning

338 0 27
797 365 147

[SCHEDULE MORE](#)

CNX Autoview Practitioner

Tests: SVAR, Autoview (Concentrix - Fresher)

369 154 2180
78903 2734 61133

[SCHEDULE MORE](#)

CNX Autoview Senior Practitioner

Tests: SVAR, Autoview (Concentrix - Experienced)

24 31 229
1025 289 680

[SCHEDULE MORE](#)

Autoview_Fresher_Pilot

Tests: Autoview_Fresher_Pilot

20 77 164
1135 552 582

[SCHEDULE MORE](#)

1

The table shows an assessment wise count of the number of candidates who have completed that assessment. Further, if cut off has been applied to a particular assessment, user can view the number of candidates who fall under the following categories:

- A. Strong Consider (Candidates who performed good in the test)
- B. May Consider (Candidates who performed average in the test)
- C. Not Consider (Candidates who did not perform well in the test)

2

The pie chart is a graphical representation of the candidate funnel amongst the three categories namely candidates who fall under strong consider, may consider and not consider

3

This section shows a list of most recently used assessments. User can view the stats for these tests in this section and schedule more candidates into the assessments by clicking on the “Schedule” button.

Create Assessments (1/6)

Assessments

- Create Assessment
- My Assessments

Select the test modules

Create Assessment: Sales Consultant_17



Search keywords e.g. Sales, Software Engineer, English | All |

Name your assessment

Note: The test will be delivered in following sequence to the candidate. Please drag and drop to re-arrange.

<input type="checkbox"/>	NAME	QUESTIONS	DURATION
<input checked="" type="checkbox"/>	:: Sales Competency Test	12	00h 20 min
<input checked="" type="checkbox"/>	:: Business Analysis	8	00h 15 min
<input checked="" type="checkbox"/>	:: Personality	72	00h 15 min

Create Assessments (2/6)

UNDO CHANGES TOTAL DURATION: 00h:50m

ADD MORE TESTS ⊗

Custom Tests ▼ 🔍

NAME	QUESTIONS	DURATION
SVAR	37	00h:30m +
SVAR	37	00h:30m +
Autoview	10	00h:40m +

Tags

Sales Consultant ⊗

BACK **SAVE & NEXT**

Create Assessments (3/6)

Create Assessment

My Assessments

Set the AutoProc Features

Assessment Environment Shortlist Criteria Scheduling

Do you want us to proctor these assessments?

Auto Proc	Live Proctoring	Live Monitoring
Browser Lock <input checked="" type="checkbox"/>	Audio Record <input checked="" type="checkbox"/>	Audio Record <input checked="" type="checkbox"/>
Candidate Snap Shot <input checked="" type="checkbox"/>	Browser Lock <input checked="" type="checkbox"/>	Browser Lock <input checked="" type="checkbox"/>
iCard Image Capture <input checked="" type="checkbox"/>	Print Screen Lock <input checked="" type="checkbox"/>	Live Stream <input checked="" type="checkbox"/>
Print Screen Lock <input checked="" type="checkbox"/>	Video Record <input checked="" type="checkbox"/>	Print Screen Lock <input checked="" type="checkbox"/>

Assessment Details

Test Name	Questions	Duration	Test Language
Sales Competency Test	12	00h:20 min	English

Create Assessments (4/6)

Select the Test Delivery Mode

Create Test Registration Page or select the Default Form

Mode of Delivery

Desktop ON Mobile Devices OFF

Candidate details form i ON

Create New Select/Modify Existing

Form Name:

Field Name	Field Type	Values	Mandatory	Actions
<input checked="" type="checkbox"/> Name	Text Box	NA	<input checked="" type="checkbox"/> ON	
<input checked="" type="checkbox"/> Email Id	Text Box	NA	<input checked="" type="checkbox"/> ON	
<input checked="" type="checkbox"/> Mobile Number	Text Box	NA	<input type="checkbox"/> OFF	

Create Assessments (5/6)

User Management ▼

Set the test cut offs (Optional)

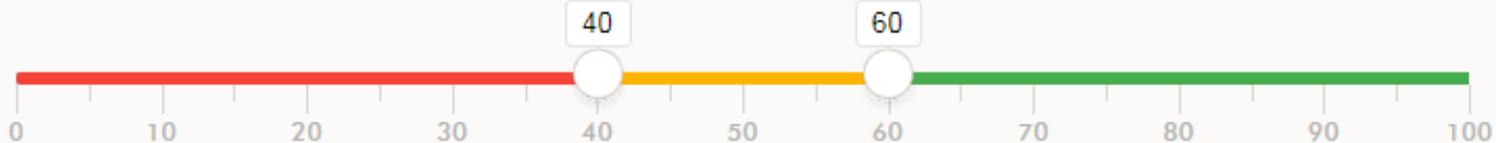
Shortlist Criteria ON

Define New Select Existing Request Custom

Criteria Name :

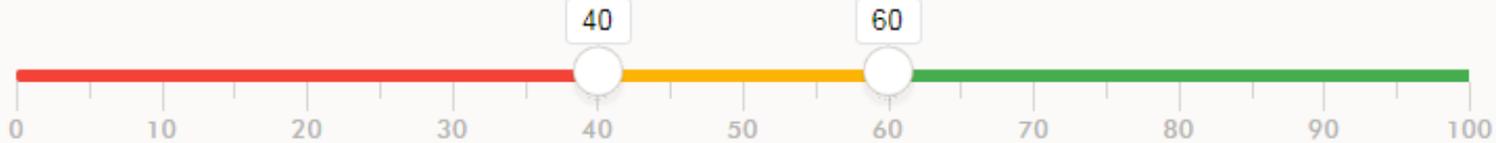
● Not Consider ● May Consider ● Strong Consider ↻

Sales Competency Test



0 10 20 30 40 50 60 70 80 90 100

Business Analysis



0 10 20 30 40 50 60 70 80 90 100

Create Assessments (6/6)



To save assessment click on
Schedule Later/Schedule Now

BACK

SCHEDULE LATER

SCHEDULE NOW

My Assessment (1/2)

The screenshot displays the 'My Assessments' interface. On the left is a navigation sidebar with 'Assessments', 'Create Assessment', 'My Assessments', and 'User Management'. The main content area features a search bar with the placeholder 'Assessment Name, Test Name', a dropdown menu set to 'My Assessments', and a red 'SEARCH' button. Below the search bar is a 'Sort By' dropdown set to 'Latest to Oldest' and a 'View all candidates' button. A table lists two assessments: 'Demo Test1' and 'Demo Test2'. Each row contains four colored status boxes (purple, blue, green, yellow) with numerical values (1 or 2, 0) and two icons (calendar and document). Annotations with arrows point to the 'View all candidates' button and the document icon, with text explaining their functions.

Assessment Name	Score 1	Score 2	Score 3	Score 4	Calendar Icon	Document Icon
Demo Test1	1	1	0	0	Yes	Yes
Demo Test2	2	2	0	0	Yes	Yes

My Assessment (2/2)

1

User can search for assessments on 2 categories

- a) **Assessment Name/Test name** : Select “Assessments” from the drop down next to search bar and type an assessment name or a test section name.
- b) **Candidate name** :
 - i. Select “Candidates” from the drop down next to search bar and search a candidate name.
 - ii. System displays the list of tests in which a candidate with the searched name has been scheduled.

2

User can perform two different actions against an assessment, namely:

- a) **Schedule Test**: Schedule candidates under the assessment and send them the test login credentials.
- b) **Candidate details**: View the candidate details/scores/reports of the candidates who have completed the test OR reschedule the tests for candidates who have not yet attempted the test.

Schedule Assessment: Bulk Scheduling (1/2)

The screenshot displays the 'Edit Assessment' page in the 'Scheduling' tab. The interface includes a sidebar with 'Assessments', 'Create Assessment', 'My Assessments', and 'User Management'. The main content area shows the 'Scheduling' section with the following elements:

- 1:** Country * (India) and Time Zone * ((UTC + 5:30) Bombay, Calcutta, ...)
- 2:** Mode of scheduling: Bulk data upload (selected), Add Individually, Common Link
- 3:** From * (12-05-2019 00:00:00) and To * (19-05-2019 00:00:00)
- 4:** Upload candidate data CSV/XLSX following the format and instructions in the Sample [CSV / XLSX](#)
- 5:** Upload CSV/XLSX button
- 6:** Assessment completion alert (OFF)

- 1 Select the **country and time zone** from the given options.
- 2 Recruiters can use either of the following 2 methods to schedule/invite candidates for an assessment
 - a) **Bulk Schedule** : Select this option to schedule large number of candidates in one go, by uploading an excel sheet
 - b) **Single Schedule** : Select this option if you want to schedule a few (1-5) candidates at a time
- 3 Select the **date and time range** for which you want the scheduled tests to be valid.
The login credentials generated for a candidate are valid only within the date and time range selected (i.e. a candidate can not use the login credentials to attempt the test once the schedule date and time range has expired OR the schedule date and time range has not started yet)
- 4 Click on the download sample file to download the sample .csv and .xlsx file formats in which the candidate data needs to be uploaded for bulk scheduling.
- 5 Click on this button to upload the list of candidates for whom you want to schedule the assessment.
Note:
 - 1) *The data should be in the same format as the sample file, else the upload may NOT be successful.*
 - 2) *The system ensures that each user should have a unique username. If the username is not unique, the system will auto edit the username to make it unique.*
- 6 Switch “On” the toggle button to receive an email notification whenever a candidate completes the test. User can provide a list of comma separated email id’s . Email notifications will be triggered to all these email ids, once a user completes the test.

Schedule Assessment

Bulk Scheduling (2/2)

The screenshot displays the 'Schedule Assessment' interface. At the top, there is a teal bar for 'Assessment completion alert' with a toggle switch set to 'OFF'. Below this is another teal bar for 'Candidate Notifications' with an information icon. Underneath is a table with columns for 'Type', 'Email', 'SMS', and 'CONTENT'. The 'Assessment Details' row shows a checked checkbox for 'Email', an unchecked checkbox for 'SMS', and a pencil icon for 'CONTENT'. A red button at the bottom right says 'SCHEDULE AND DOWNLOAD EXCEL'. Callout 8 points to the 'Assessment completion alert' bar, callout 7 points to the pencil icon, and callout 9 points to the 'SCHEDULE AND DOWNLOAD EXCEL' button.

Type	Email	SMS	CONTENT
Assessment Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

SCHEDULE AND DOWNLOAD EXCEL

- 7 Select the respective check boxes to send email/sms notification to candidates. Also, edit the email/sms content to be sent to candidate.
Note: *Email/sms notifications will be sent to only those candidates whose valid email id and contact details have been provided in the uploaded excel.*
- 8 Select the respective check boxes to send email/sms notification to evaluator. Also, edit the email/sms content to be sent to candidate.
- 9 Save and download excel : Click on this button to successfully schedule the test. This button will become active only once the mandatory fields required to schedule a test have been filled.

Schedule Assessment

Single Scheduling

User Management

Assessment Validity

Country * Hungary Time Zone * [UTC + 1:00] Berlin, Brussels, Cope...

1 → From * 12-05-2019 00:00:00 To * 19-05-2019 00:00:00

Candidate Details

Mode of scheduling : Bulk data upload Add Individually Common Link

Candidate 1

First Name

Last Name

Email

2 → Username *

Password * 3 →

Mobile

Date of birth dd-MM-yyyy 4 →

5 → + Add custom tag

+ Add another candidate

- ① Select the **date and time range** for which you want the scheduled tests to be valid.
The login credentials generated for a candidate are valid only within the date and time range selected (i.e. a candidate can not use the login credentials to attempt the test once the schedule date and time range has expired OR the schedule date and time range have not started yet)
- ② Fill in the candidate detail form. Please ensure the following while filling these details
 - a) Username must be unique
 - b) Password must be at least 6 characters long and should contain at least 1 character, 1 number and 1 special character
- ③ Click on the button to see the password (if required).
- ④ User can also add custom tag fields.(Any other information which you want to capture: e.g. Company Id etc)
- ⑤ Click on this button to schedule more candidates and enter their details.

Rest of the options are same as bulk scheduling.

Rescheduling (1/2)

aspiringminds Account Summary Tata Consumer Pr...

Assessments ▼ Candidate Details : FLS Test Scheduled : 5

Search on comma separated values on name, AMCAT id, email id ✕

Schedule By: Select User ▼ Status: Pending ▼ Schedule Date: DD-MM-YYYY To DD-MM-YYYY ↻ ▼

Attempt Date: DD-MM-YYYY To DD-MM-YYYY ↻ ▼

↻ **SEARCH**

Reports ? ▼ Reports Excel ? ▼ Select Excel ⚙️ Actions 🔄 💬 ✉️

● Strong Consider ● May Consider ● Not Consider ● Completed ● In Progress ● Pending ● Expired

<input type="checkbox"/> Status ↑	Name & AMCAT ID ↑	Contact	Test Scores	Action
<input type="checkbox"/> ●				↻ ✉️ ⋮ ⚙️

Rescheduling (2/2)

The screenshot shows the 'Reschedule' page in the AspiringMinds system. The page is divided into four steps: Assessment, Environment, Shortlist Criteria, and Scheduling. The 'Scheduling' step is active. The 'Assessment Validity' section includes dropdowns for 'Country *' (India) and 'Time Zone *' (UTC +05:30 IST (New Delhi)). Below this, the 'From *' and 'To *' date and time fields are highlighted with a blue box and labeled with a circled '2'. The 'Candidate Details' section contains several input fields: 'First Name' (shaifali dubey), 'Last Name' (empty), 'Email' (shaifali.dubey@aspiringminds.com), 'Username *' (shaifali.dubey@aspiringminds.com_crx), 'Password' (masked with dots), 'Mobile' (empty), and 'Date of birth' (dd-MM-yyyy). A checkbox labeled 'Change password for the candidate' is checked and highlighted with a blue box and labeled with a circled '4'. The 'Email' field is also highlighted with a blue box and labeled with a circled '3'. The top right of the page shows 'Credits Available : 9940' and navigation links for 'Account Summary' and 'Tata Consumer Pr...'. The AspiringMinds logo is in the top left, and a user profile icon is in the top right.

- 1 Under the '**Action**' Column, a reschedule icon is displayed for the candidate whose test is either pending or expired. Click on the icon to rescheduled the test.
- 2 Select on date range for which you want to reschedule the test. The login credentials will be valid only in that date & time range.
- 3 User can change the email address of the candidate while rescheduling the test (Credentials will be triggered to the mentioned email address only)
- 4 While rescheduling please click on change password icon other wise candidate will received a message password as previous instead of a password in his rescheduled mail.

Candidate Details (1/3)

The screenshot shows the 'Candidate Details' page in the Aspiring Minds system. The page includes a sidebar with navigation options, a top navigation bar, a search bar, and a table of candidate data. Five numbered callouts highlight specific UI elements:

- 1**: Points to the 'Scheduled : 1028' text in the top right corner.
- 2**: Points to the 'Actions' column in the table, which includes a gear icon for row-level actions.
- 3**: Points to the 'Status' column in the table, which shows green circles for 'Strong Consider'.
- 4**: Points to the action icons (calendar, envelope, plus) in the 'Action' column of the table.
- 5**: Points to the 'Actions' panel in the top right, which contains icons for calendar, envelope, and plus.

Page Header: aspiringminds | Account Summary | Demo MIS | [User Profile]

Left Sidebar: Assessments (Create Assessment, My Assessments), User Management

Search Bar: Search on comma separated values on name, AMCAT id, email id

Filters: Reports (Reports), Excel (Select Excel)

Legend: Strong Consider (Green), May Consider (Yellow), Not Consider (Red), Completed (Blue), In Progress (Light Blue), Pending (Teal), Expired (Grey)

Status	Name & AMCAT ID	Contact	Test Scores	Action
<input type="checkbox"/> Strong Consider	BEENA P 229020006351271	premclt@yahoo.co.in	Information Gathering and Synthesis: 50.00 Personality: 0.00	[Calendar] [Envelope] [Plus] [Gear]
<input type="checkbox"/> Strong Consider	siddhant awale 229020006825246	siddhantawale8497@gmail.com	Information Gathering and Synthesis: 67.00 Personality: 0.00	[Calendar] [Envelope] [Plus]
<input type="checkbox"/> Strong Consider	ANUSH R N 229020006903293	anushkichu@gmail.com	Information Gathering and Synthesis: 100.00 Personality: 0.00	[Calendar] [Envelope] [Plus]

- ① This status counter displays the total number of candidates scheduled under this assessment.
- ② List of candidates that have been scheduled under this assessment. You can select the columns you want to view in this table by clicking on the setting icon (First name, Last name , Email id , Scores etc)
- ③ “Status” column represents the test status of the candidate (Completed, In Progress, Pending, Expired)
If a candidate has completed the test and cut off has been applied for the assessment, candidate category is display here(Strong consider, may consider, not consider) based on the performance in the test
- ④ Under the “Actions” column, a report icon is displayed for the candidates who have completed the test. Clicking on this report icon will open the required report for the candidate

For candidates whose test status is pending, an icon to reschedule test is displayed. User can click on this icon to reschedule the test for that particular candidate

- ⑤ Actions
 - a) Bulk Reschedule : To reschedule the test for more than 1 candidate
For each case, select the candidates from the list, for whom these actions are to be performed

Candidate Details (2/3)

aspiringminds Account Summary Demo MIS

Assessments ^

Create Assessment

My Assessments

User Management v

Candidate Details :

 Scheduled : 1028

Search on comma separated values on name, AMCAT id, email id

Schedule By: Select User

Attempt Date: DD-MM-YYYY To DD-MM-YYYY

Status: Select AMCAT/Candidate status

- All
- Completed(290)
- Strong Consider(24)
- May Consider(31)
- Not Consider(230)
- In Progress(3)
- Pending(55)
- Expired(680)

Schedule Date: DD-MM-YYYY To DD-MM-YYYY

SEARCH

Reports

Reports

Strong Consider May Consider Not Consider Completed In Progress Pending Expired

Status ↑ Name & AMCAT ID ↑ Contact Test Scores Action

1

2

1 Search Functionality

- a) User can search a candidate on one of the following fields (First name, Contact number, Email id or AMCAT id)
- b) In order to search multiple candidates simultaneously, please input comma separated list of candidate details for searching. All the comma separated values must belong to the same field type (First name, Contact number, Email id or AMCAT id)

Advanced Search (Can perform advanced search on following 3 fields)

- a) **Date Range:** Apply date range filter on
 - i. Candidate schedule date : Only those candidates will be displayed which were scheduled within the set date range
 - ii. Candidate Attempt date: Only those candidates will be displayed who attempted the test within the set date range
- b) **Test status:** Apply filter based on candidate's test status (Completed, In Progress, Pending, Expired)
e.g. If the user selects "Completed", only those candidates will be displayed who have completed the test
- c) **Candidate status:** Apply filter based on candidate's performance in test (Strong consider, may consider, not consider)
e.g.: If the user selects "Strong consider", only those candidates will be displayed who have completed the test and have cleared the cut off to be classified as strong consider candidates.

Note: A combination of all the filters is applied to generate the final search results.

2 Reports:

- a) Select the candidates for whom you want to download the report
- b) Select the report you want to download, from the dropdown
- c) Once you select a report, a download icon appears. Click on this icon to download the report
- d) If you select all candidates by checking the check box next to column "Status" and download a report, that particular report will be downloaded for all the candidates present on that page

- 3 **Excel:** User can use this option to download candidate results (section wise scores) in an excel file
- a) Select the candidates for whom you want to download the excel.
 - b) Select the excel you want to download, from the dropdown.
 - c) Once you select a excel, a download icon appears. Click on this icon to download the excel.

User Management (1/2)

User Management ^

Add User

List User

Personal Information Permissions

First Name *

Last Name

1 → Email Id *

User Name *

Contact Number * 91

Department

Designation

Country India ▼

Time Zone (UTC + 5:30) Bombay, Calcu... ▼

Interface Language English ▼

2 → Status Active

3 → SAVE AND NEXT

User Management (2/2)

- Assessments
- User Management
- Add User**
- List User

Add User

Personal Information

Permissions

4 →

5 → Assessment Management

- Create Assessment
- Schedule Assessment
- Create Common Login
- Send Results
- List Assessments
- Override Dedupe
- Delete Assessment

Report Management

- Download Report
- Define Custom Excel
- Download Excel

User Management

- Add User
- View User
- View Account Summary
- Create Custom Templates

Note: To Create Read Only Access, Select **Interviewer** Role

The system supports the functionality to create multiple users with different set of permissions. e.g. we can define a Central/HQ Recruiter role which has the permissions to create a test, schedule tests, view candidate details and download reports. At the same time we can create a user at Recruiter level, who only has the permissions to schedule the assessments and view candidate reports.

To create a new user please follow the below steps

- 1 **Personal Information:** Fill in all the required fields (Follow the below instructions while filling the information)
 - a) Username must be unique. The system will show a prompt if the username entered is not unique.
 - b) By default email id is marked as the username, but user has the choice to edit it.
 - c) The login credentials for the account will be sent to the email id entered in the form
- 2 By default a user's status is active. However, if a user's status is marked as inactive, he/she can not use the login credentials to access the account.
- 3 Click on **SAVE AND NEXT** and assign a role (Set of permissions) to this user.
- 4 User can either select an existing role from drop down or can choose to create a new role. There are 4 default roles defined in the system which can not be edited.
- 5 While creating a new role, user can assign custom permissions to that role.
Note: Only the user who has created a particular role can edit that role. Although this role will be visible in the drop down to all other users, who can use it and assign it to a user.
- 6 Click on **RESET** button, to reset to the default permissions

Note:

- a) While creating a new user, user can assign only those permissions, which are available with the current user login.
- b) User can not edit the default roles but can create a new role with custom permissions.

Thank You