SHL TalentCentral+ User Guide

User Management

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Controlling Access on TalentCentral+

Administrator access on TalentCentral+ can be controlled in two ways: by User Role and by User Group. User Roles control the tasks and actions that an administrator can perform whilst user groups control which projects an administrator can access.

User Roles and Permissions

There are multiple pre-configured user roles on TalentCentral+ that can be assigned to an admin user, listed below. These are known as default roles.

Role	Permissions	Main Tasks
Head HR	Full Access	create projects/ scheduling participants/ evaluating/ video management/ user management/ branding
Recruiting Manager	High	create projects/ scheduling participants / evaluating/ custom authoring/ video management
Operations Associate	High	create projects/ scheduling participants /evaluating/ video management
Recruiting Lead	Medium	scheduling participants / reporting/ supervise interview
Recruiter	Medium	scheduling participants / reporting
Associate	Low	scheduling participants
Interviewer	Low	schedule participants and view interview configurations
Invigilator	Restricted	proctoring

For a full listing of the user permissions associated to each role please see **Appendix 1**.

It is possible to create a custom user role to meet the needs of your organisation and this will be covered in the section headed **Create User Role**.

User Groups

User Groups control which administrators have access to a project and its results. These are often used to maintain confidentiality amongst users. The level of access assigned to a user will determine what actions they can perform within the project.

A user group can contain administrators with varying user roles, and an administrator can be added to multiple user groups.

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Company Settings

User Management is located in Company Settings and access to this is controlled by user permissions.

Depending on user role you will have the ability to create and manage users and user groups, as well as create new user roles.



User Management

Full User Management is currently assigned to the Head HR role, and this is usually the level of access granted to the first administrator on the account. The Head HR user will then create user accounts for other administrators on the system.

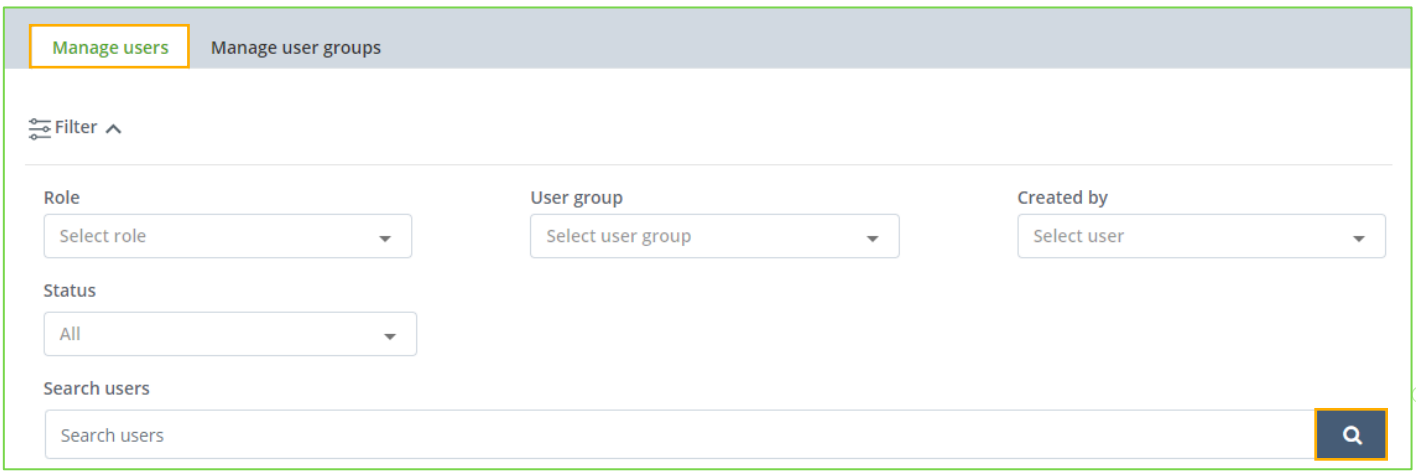


From Company Settings select *Manage users & groups*

Existing Users

A hierarchy exists in user management and a user has permission to edit any user they have previously created.

Enter the name of an existing user and click the *magnifying glass* to navigate directly to their profile.

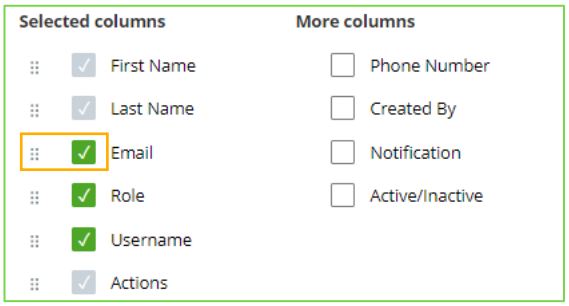


For a wider search clear the name and click *magnify glass* to display all users.

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To narrow your search, use the filter options and click the *magnify glass* to return search results.

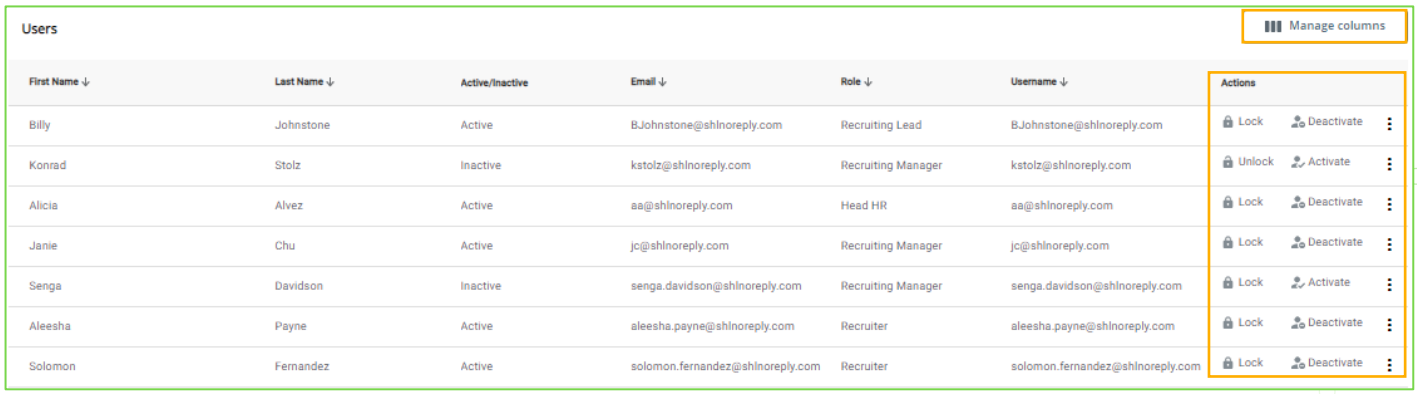
The user information displayed on screen can be edited via *Manage columns*.



Check/uncheck the data to display.

Use ⠿ to drag and drop columns into the correct order.

There are several actions that can be applied to an existing user, all accessed from *Actions*:

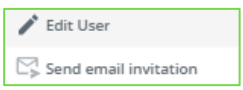


You will not be able to edit user accounts which were not created by you, or by users created by you.

To suspend a user account, click on *Deactivate*. Click *Activate* to reinstate or unsuspend a user account.

If a user enters an incorrect password three times their account will be **locked**.
Click on *Unlock to* reinstate access.

From the *vertical ellipsis menu* ⋮ there are two further options



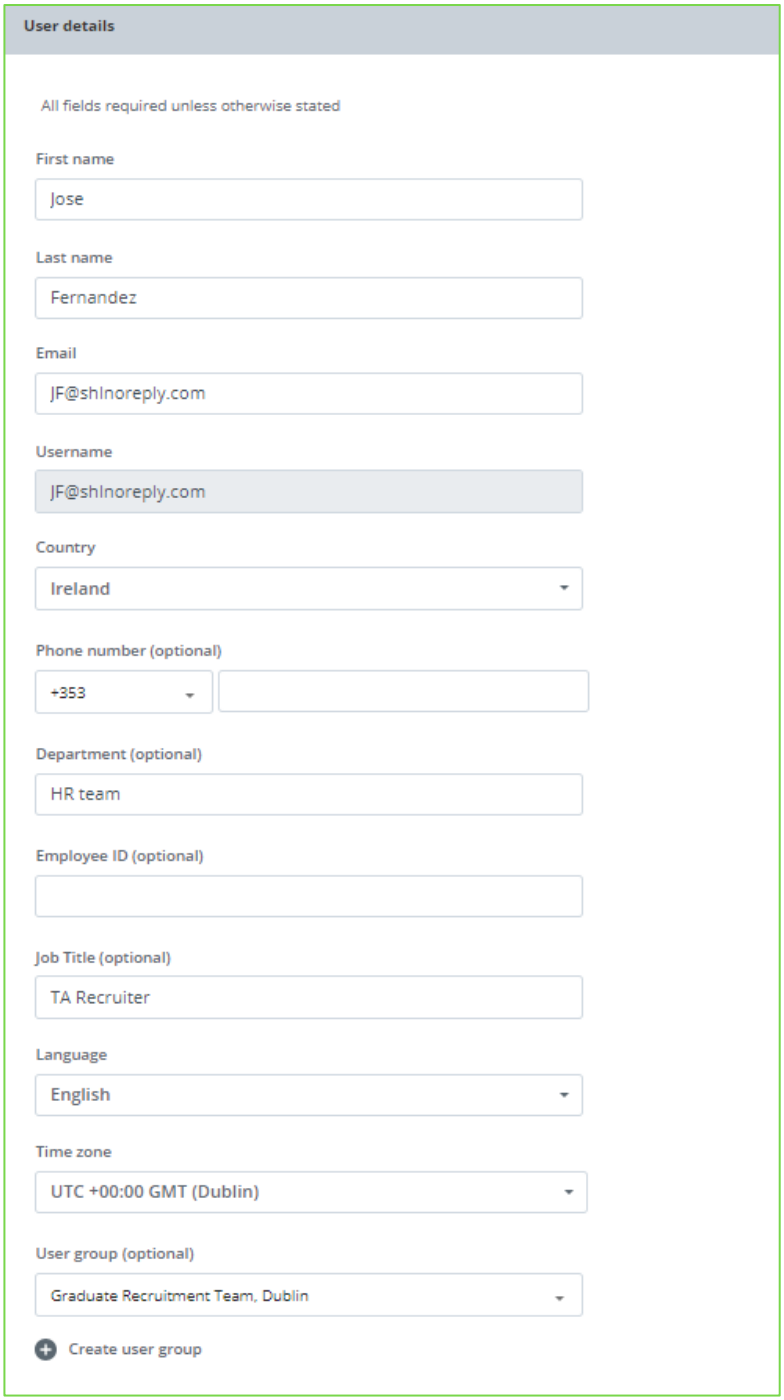
Edit User and *Send email invitation*

Click on *Send email invitation* to send an email containing user login details.

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Edit User is a two-step process:

1) Edit user details
2) review user role & permissions



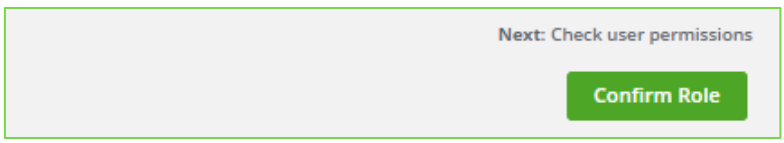
Edit User details:

Edit the details as required.

Username cannot be edited and is locked.

Add and remove user groups assigned to this user profile.

It is possible to create a new user group directly from this screen. Remember to then select it from the user group dropdown and assign to the user profile.



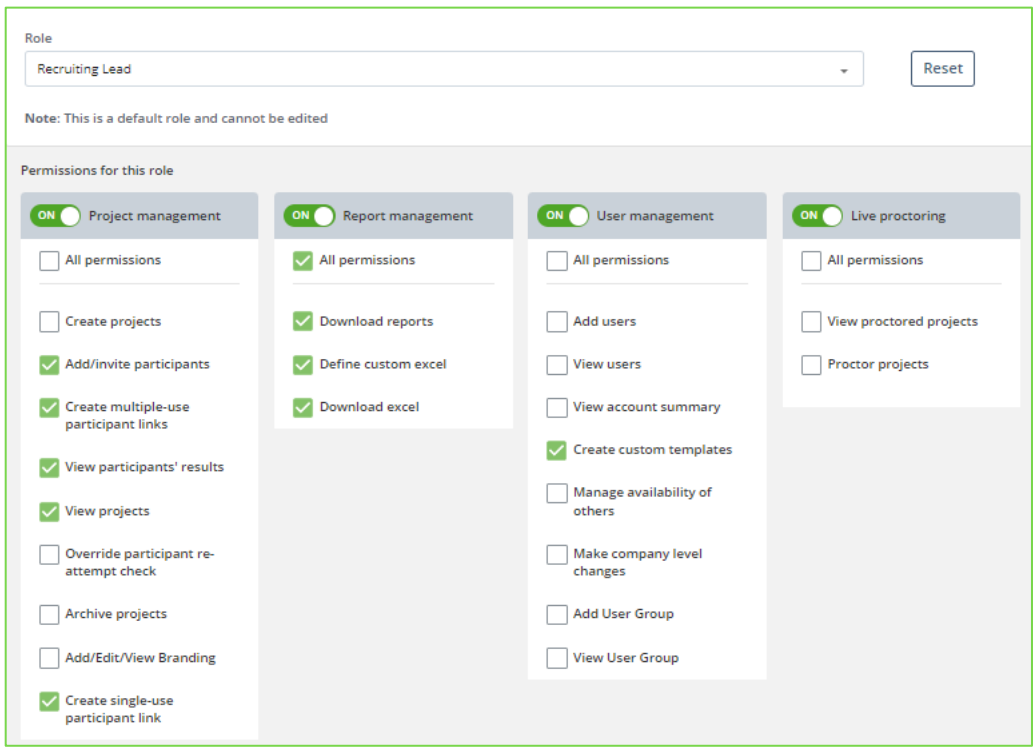
Click *Confirm Role* to proceed.

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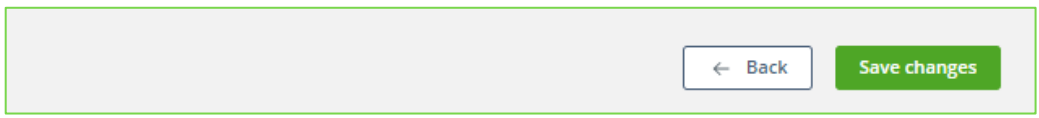
Review role & permissions:

Change the user role if required.

If using a custom user role, permissions can be edited. Default user roles permissions cannot.



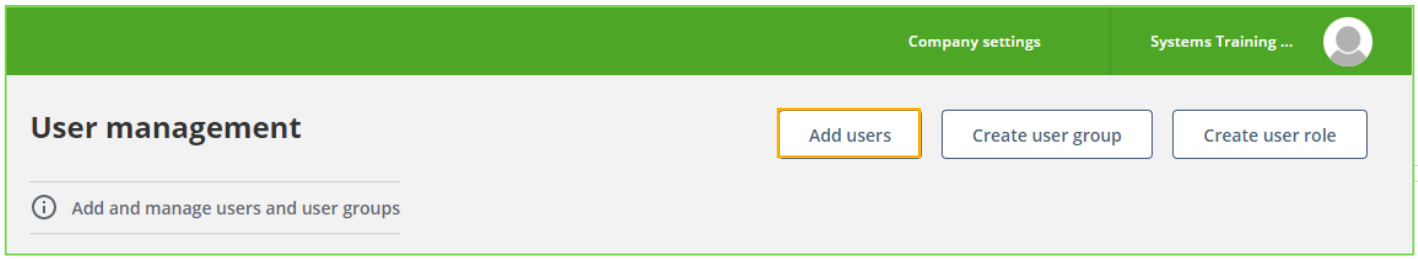
Save changes to end.



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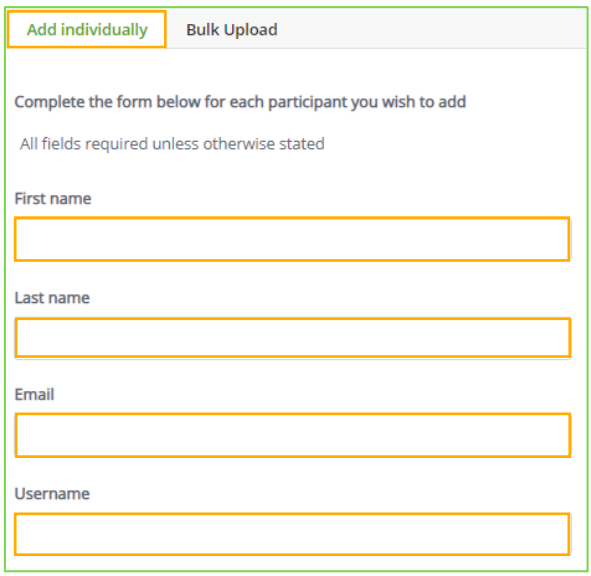
Add Users

To create a new user, click *Add users*.



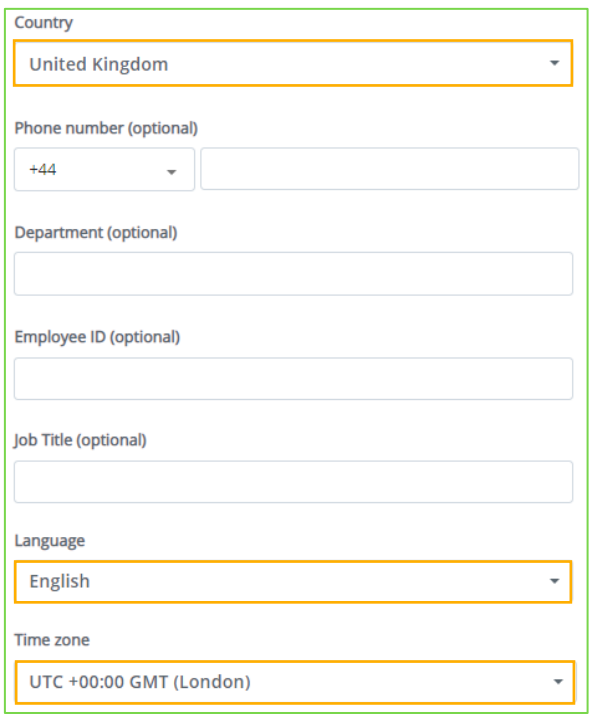
Users can be added in two ways: individually or by bulk upload.

To **add individually:**



Complete the mandatory fields of *first name, last name,* and *email address*.

The *username* will auto-populate to match the email address.



Additional fields of *Country, Language* and *Time Zone* will populate automatically – adjust as necessary.

Complete any optional fields as desired.

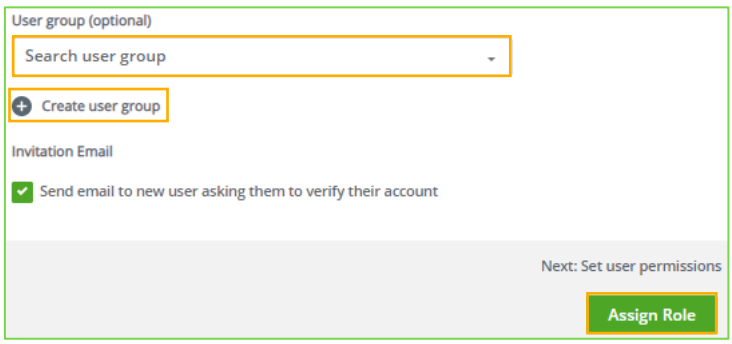
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User Groups

These are an optional feature.

If a user group has been assigned to a project, then administrators who are part of that user group will be able to view the project.

An administrator's user role will determine what tasks and activities they will be able to complete such as adding participants or viewing participants and results.



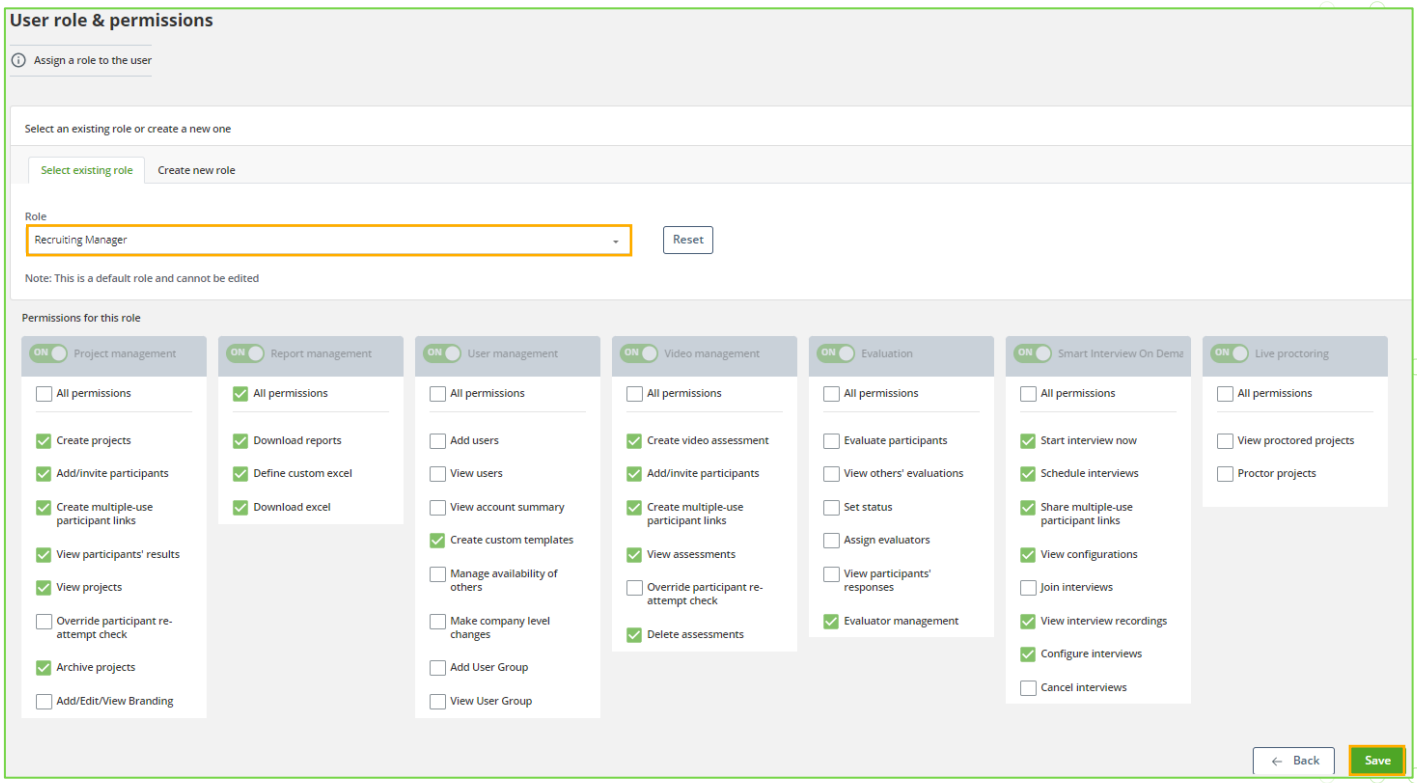
To add the user to an existing user group, select from the dropdown list.

If the required group does not exist, click on *Create user group*. Add a name and description and click on *Create user group.* The new user group will now appear in the dropdown list to select.

Check the *invitation email* box to send a notification email to the new user upon creation.

Click on *Assign Role* to set the permission level.

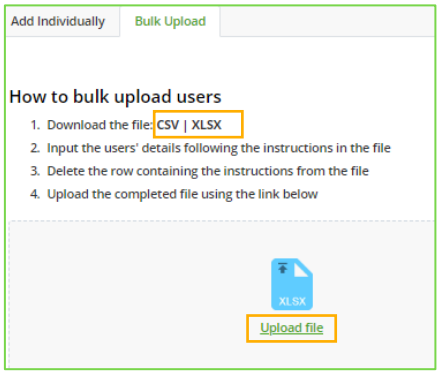
Next, select an existing user role from the dropdown to view the permissions assigned to that role.



Once you are happy with your selection click on *Save*.

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To add users via **Bulk Upload**



Download the file *CSV |XLSX*

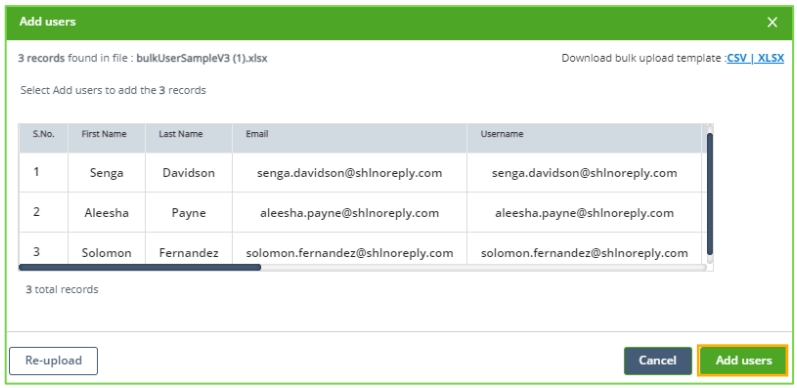
Follow the clear instructions provided within the sample file (shown below).

Complete the required fields and save.

Click on *Upload file* and navigate to the file to upload.

Bulk User Sample file:

A	B	C	D	E	
Instructions: 1. Save a copy of this file 2. Input users' details 3. Delete the row containing these instructions 4. Upload the completed file > Don't rearrange columns or change column headers > Required fields: first name, last name, email, username, language, country, time zone, role and user group > Emails, usernames, and employee IDs must be unique > Any custom user roles must already exist in the system before you upload the file					
S.No.	**First Name**	**Last Name**	**Email**	**Username**	**Phone N (optional**
1	Mark	Smith	mark.smith@shl.com	mark.smith	



The user list to be uploaded will be displayed.

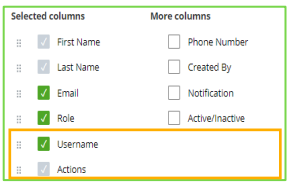
Click *Add users* to complete the task.

A messaging confirming the successful addition will be displayed.

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Create User Role

If the existing TalentCentral+ default user roles do not match your organisational needs, then it is possible to create custom user roles.



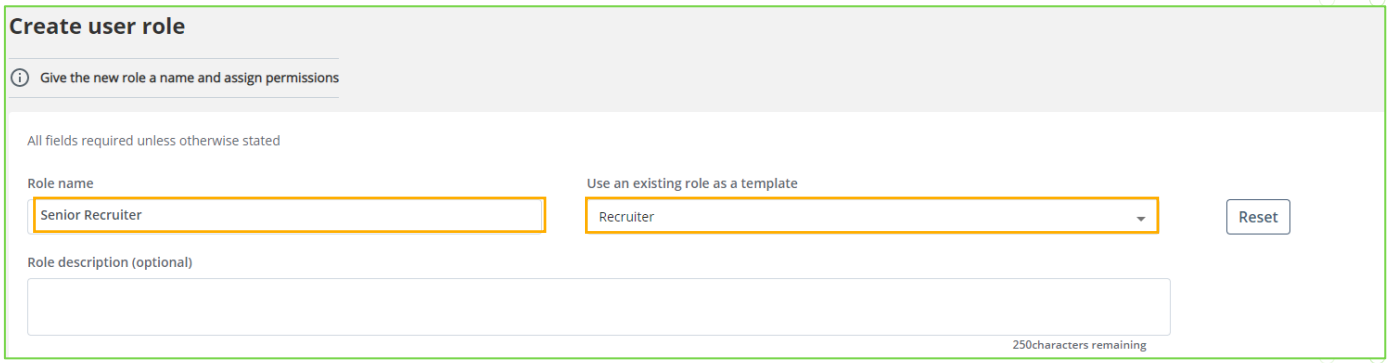
From Company Settings select *Create user role*

Create a user role from an Existing Template:

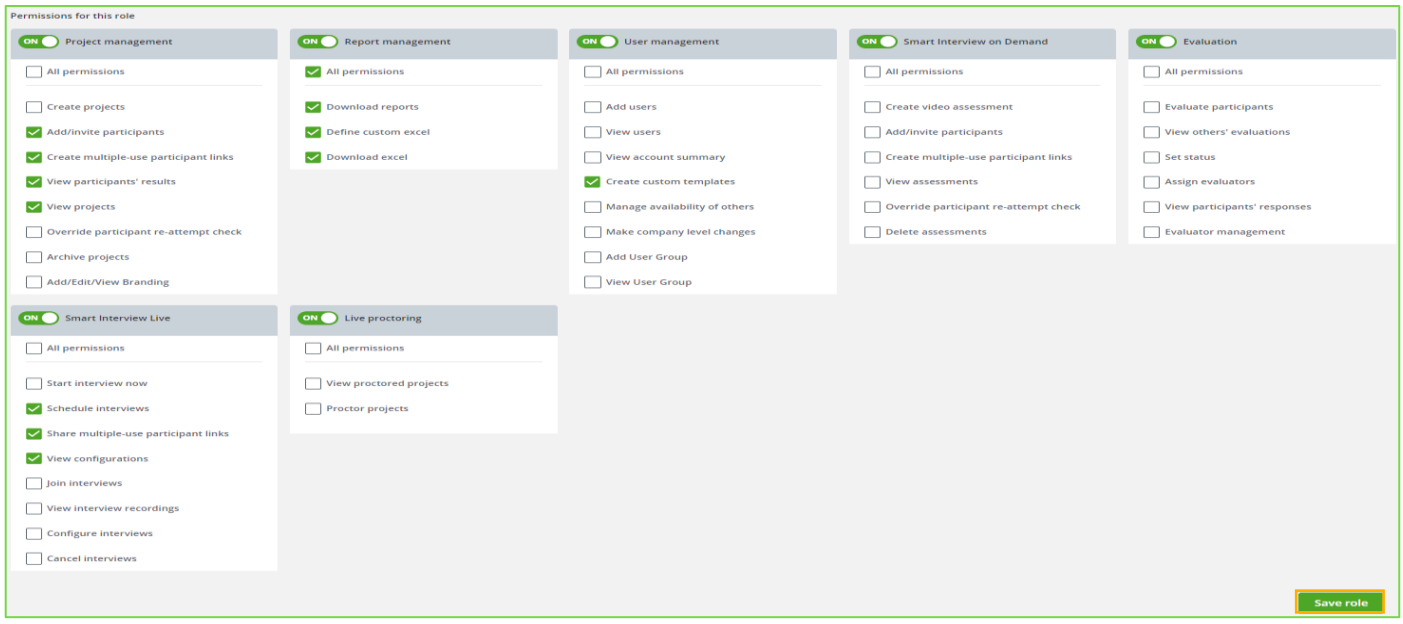
If an existing user role is a close fit and requires only minimal changes, you can use that existing role as a template and adjust.

Name your role and provide a description if desired.

Select the role from the dropdown in *Use an existing role as a template.*



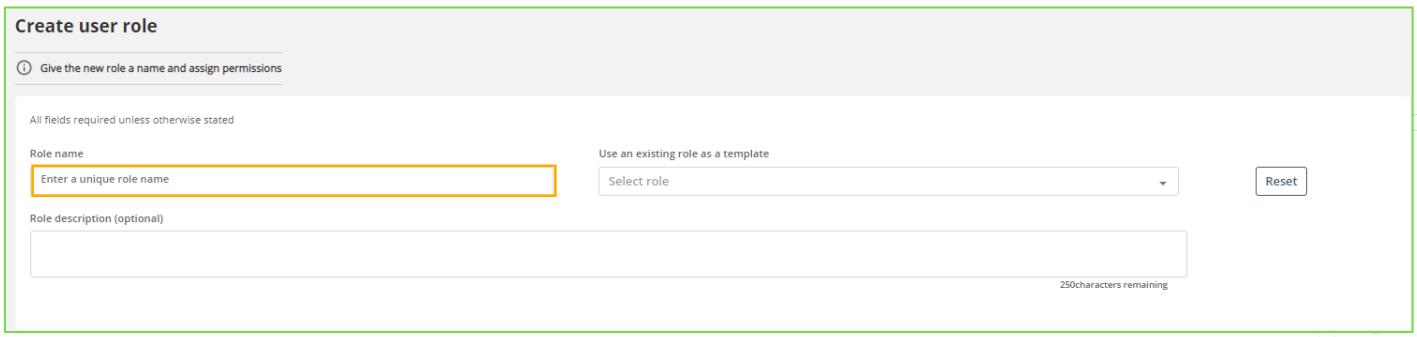
Check/uncheck the permissions that as necessary and *Save role.*



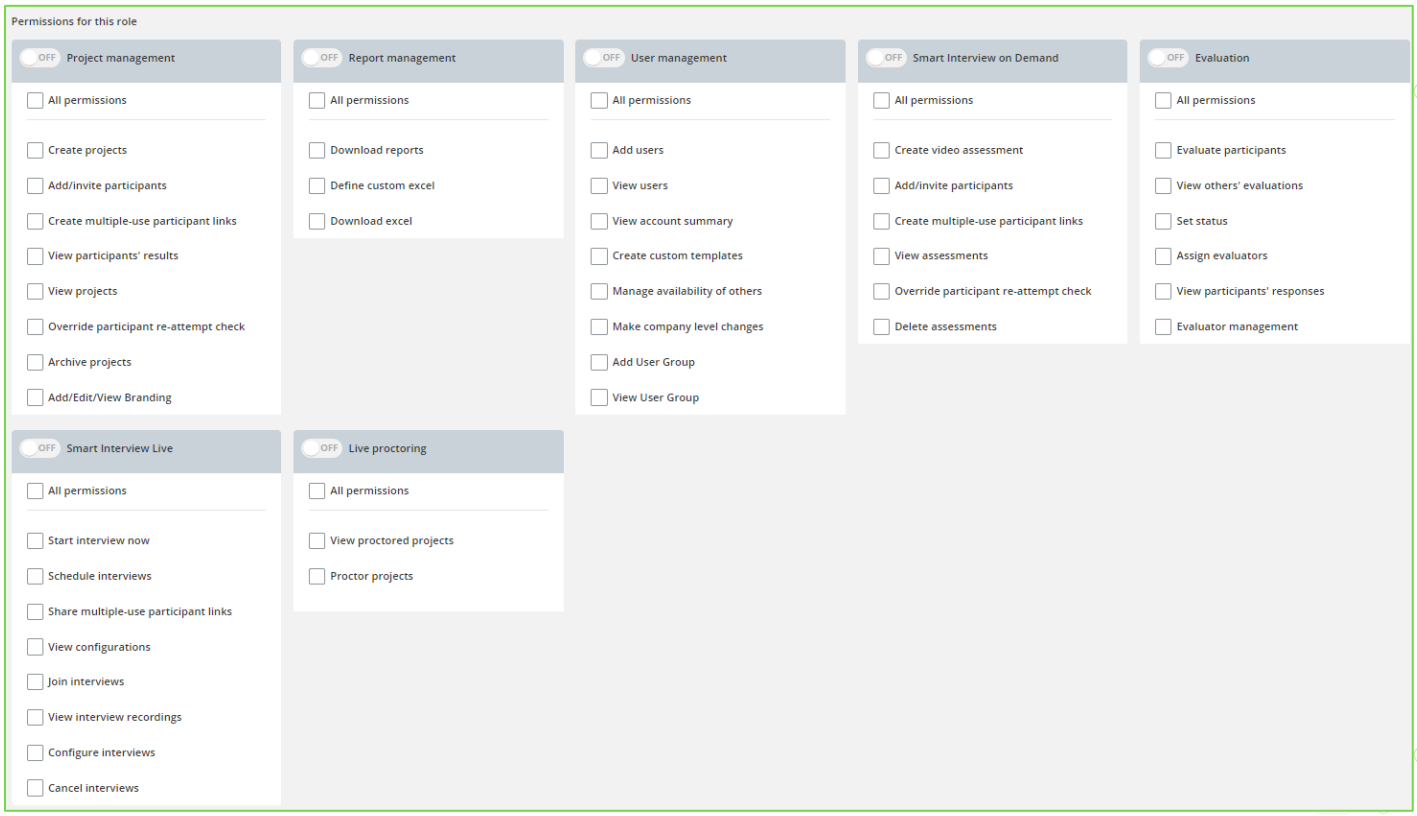
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Creating a new user role:

To create a custom user role from scratch, name the role and then decide on the required permissions.



There will be no permissions enabled for the role that you are about to create.



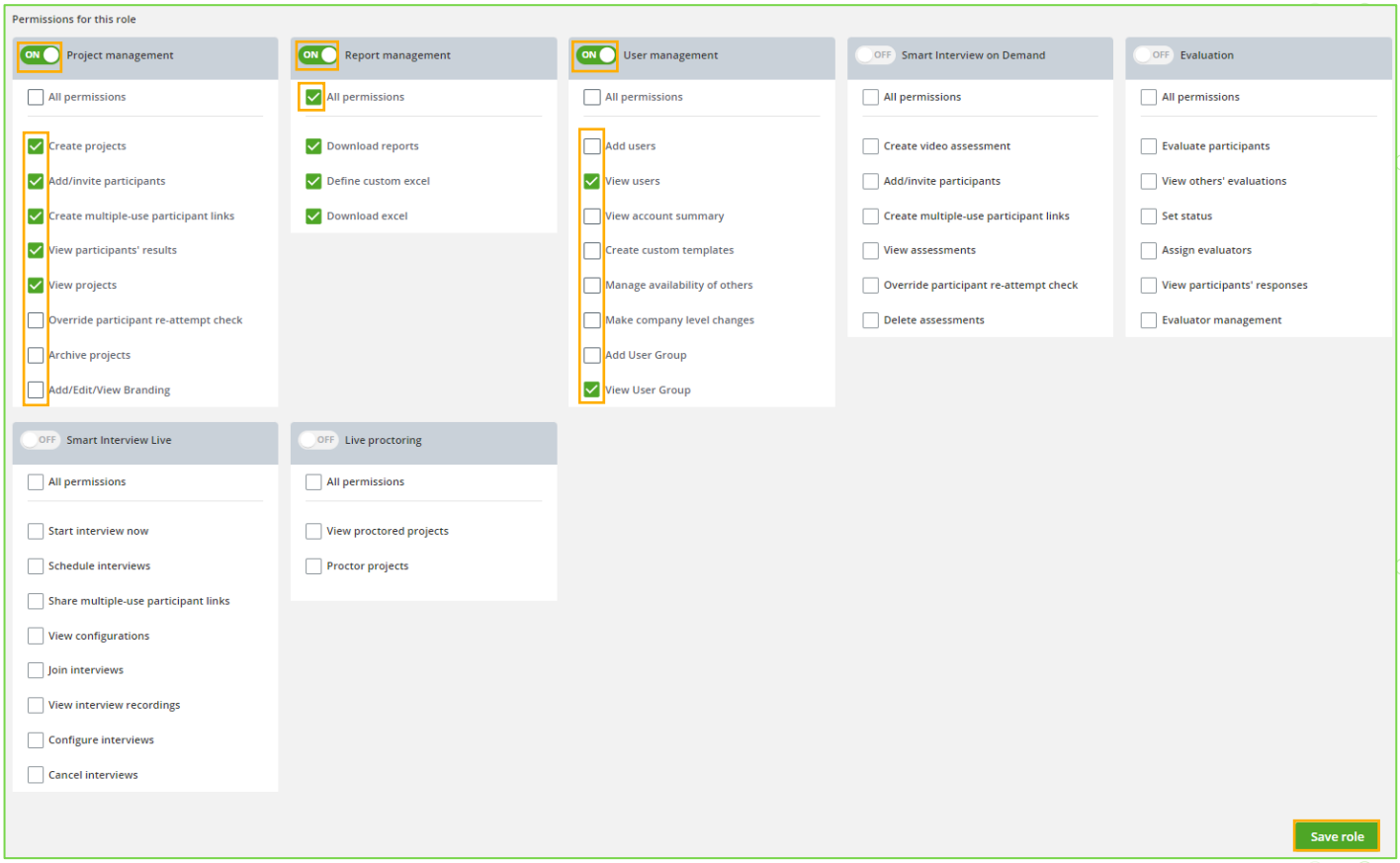
User permissions are grouped into 7 sections:

- Project Management, Report Management, User Management
- Video Management, Evaluation, Smart Interview on Demand, Live Proctoring

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To activate a section, toggle the header from *off* to *on* and then check the desired permissions.

Click on *Save role*.



Your custom role will now be available to select as an existing role and will be listed under *Custom Roles* in the dropdown listings.

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TalentCentral+ Support

For queries about our services, solutions, or products, please visit **SHL.com** or contact your SHL account representative.

For system issues please contact **https://support/.shl.com/**

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