

PS14: JOFI Users Quick Start Guide

The JOFI Assessment Management System (JAMS) has a menu of default settings that are designed to facilitate core functionality and productivity. Some of these defaults are critical to proper functioning and others are optional. In the case of optional settings, our recommendations are included below.

To find the default settings menu, click on your name in the upper right-hand corner after you have signed into JAMS.

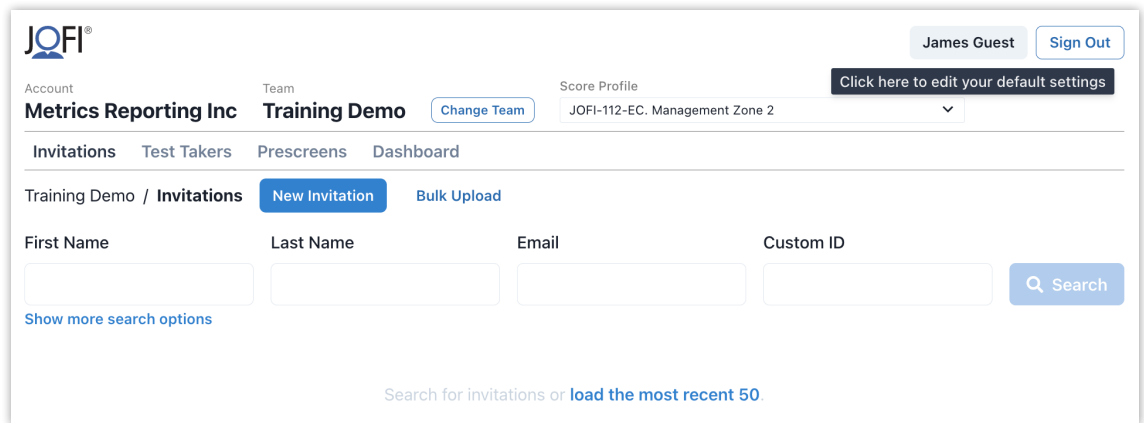


Figure 1: JAMS landing page

The first menu you will see is your User Profile summary. You can edit any of those fields by clicking Edit Account Details.

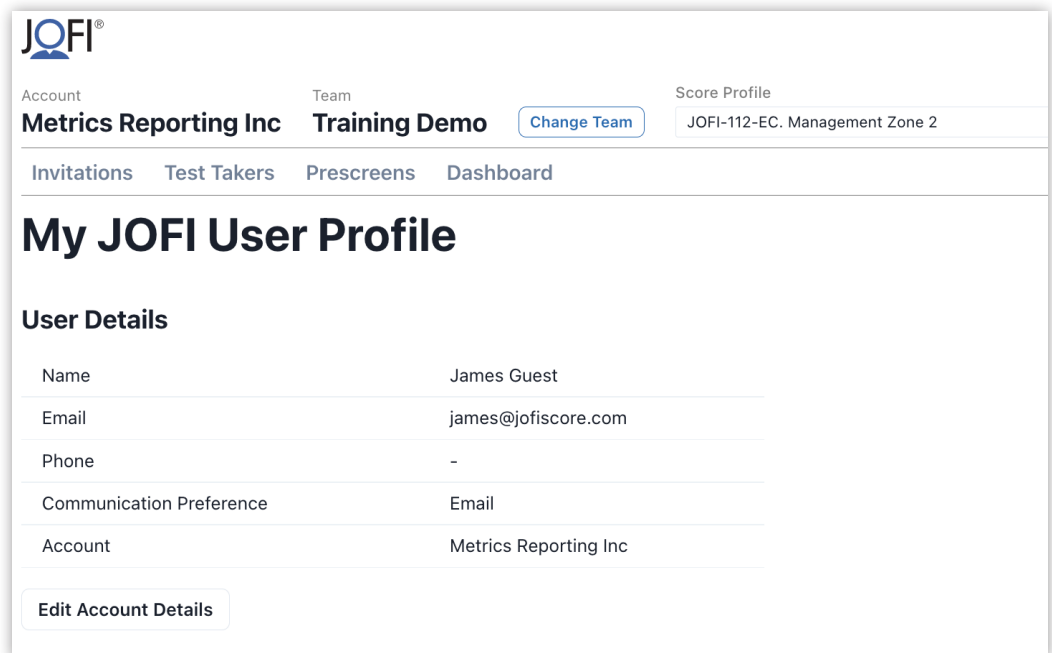


Figure 2: JOFI User Profile

Please add your mobile phone number in addition to your email address. These data fields can be used for multi-factor authentication (MFA) if this feature is turned on in your account. Submitting changes will take you back to the main default settings page. Otherwise, just hit the back button on your browser.

Next, there is a toggle switch for Notifications. Turning this switch on will send you an email each time a test taker completes all assigned assessments. We recommend starting with Notifications on and turning off only if you begin to feel like you are receiving too many emails.

Then you will see the Teams default menu. Teams for your organization are determined in the JOFI set up meeting. There must be one Team selected in order for the site to function properly. Set a default here and you can always change the team you are working in from the Dashboard (note the Change Team button in Figure 1) or by returning to this menu.

Next we see the Email Signature feature. Click Edit to draft a closing you would like to have included on your email templates.

Typically, we recommend you include a recruiter or coach's name, the organization name, and a contact email address and/or phone number. Generally the body of email templates will refer to the contact information in the signature.

Then we have a Scheduling Links feature. This optional feature allows you to embed a link to your scheduling software program so that candidates can self-schedule the next meeting.

Edit My JOFI User Profile

First Name
James

Last Name
Guest

Email
james@jofiscore.com

Phone
555-555-5555

What is your preferred method of communication?

Email
 Text Message (SMS)
 Both

Submit Discard Changes

Figure 3: User Profile Details

Notifications

Email me when test takers complete all assigned tests

Teams
Choose your default team

JOFI Assessments Support Make Default	James Guest Demo Make Default	Bill Guest Demo Make Default	Training Demo Default
Kiley Demo Make Default			

Figure 4: Notifications and Team Selection

Email Signature
Your signature will be added to the end of invitation and congratulations emails.

You haven't added a signature yet.

Edit

Scheduling Links
Add a link to emails so test takers can schedule an interview/meeting

Create a Scheduling Link

Name / Description	Link
Interview Openings	https://www.calendly.com/12345

LINK

Create

Figure 5: Email Signature and Scheduling Links

Below this we have the Invitations default menu. Here you will see one or more email templates that have been created during the set-up meeting to accompany invitations you send to test takers. You will typically only have more than one if you anticipate using more than one combination of tests. A default should always be selected, even if there is only one option.

The Congratulations toggle switch allows to you choose whether to send a congratulations email to the test taker when they have completed all assigned tests. It includes a link to the JOFI Job Fit Report or Job Fit Summary, depending on the account settings. The link enables a test taker to download the report for themselves. If the switch is on, you must choose a default.

The selections you make here will auto-populate the relevant fields of the Invitations you create.

Invitation Defaults

Invitation Email Templates
Choose the email template that should be selected by default

Invitation for MRI TS PT and/or CI
JOFI Assessments Support, James Guest Demo, Bill Guest Demo, Training Demo, Kiley Demo
Default

JOFI Invitation QP Only
JOFI Prescreen Only
JOFI Assessments Support, James Guest Demo, Bill Guest Demo, Training Demo, Kiley Demo
Make Default

Invitation for MRI for PT and CI
JOFI Assessments Support, James Guest Demo, Bill Guest Demo, Training Demo, Kiley Demo
Make Default

Congratulations Emails
 Send me a copy of test takers' congratulations emails

Email Templates

Congratulations MRI JOFI Support Team
JOFI Assessments Support, James Guest Demo, Bill Guest Demo, Training Demo, Kiley Demo
Default

Figure 6: Invitation Email Templates and Congratulations Email Templates

Next, you'll see a set of toggle switches for the JOFI Assessments themselves. Assessments switched on will auto-populate any new invitations. Keep in mind that the Prescreen, if used, should always be a first stage, with one or more of the other assessments to follow once you have narrowed down your pool of applicants. Also, you can always add or subtract a test from any invitation that you create even when the defaults are set.

Finally, you will see a list of JOFI score profiles. Select any one of them and the profile will automatically be selected as you navigate to various pages in JAMS. This is good for Users who are looking at a list of candidates for a position and wish to avoid selecting the profile manually every time they switch screens or candidates.

But choosing one of these as a default also governs how scorecards load, so we recommend you always have one set as a default. You can always change the profile as needed by using the drop-down menu (note the box under Score Profile in Figure 1).

Tests

Choose the tests that should be checked by default

- JOFI Quick Prescreen
- JOFI Personality Traits
- JOFI Thinking Skills
- JOFI Career Interests

Score Profiles

CODE	SCORE PROFILE	
JOFI-112-EC.	Management Zone 2	DEFAULT
JOFI-113-EC.	Management Zone 3	Set as Default
JOFI-113-ES	Management Zone 3	Set as Default
JOFI-114-EA	Management Zone 4	Set as Default
JOFI-114-EC.	Management Zone 4	Set as Default
JOFI-114-EI	Management Zone 4	Set as Default

Figure 7: Test and Score Profile Defaults

As always, you can contact us at support@jofiscore.com with questions.