

B-01: The JAMS User Guide

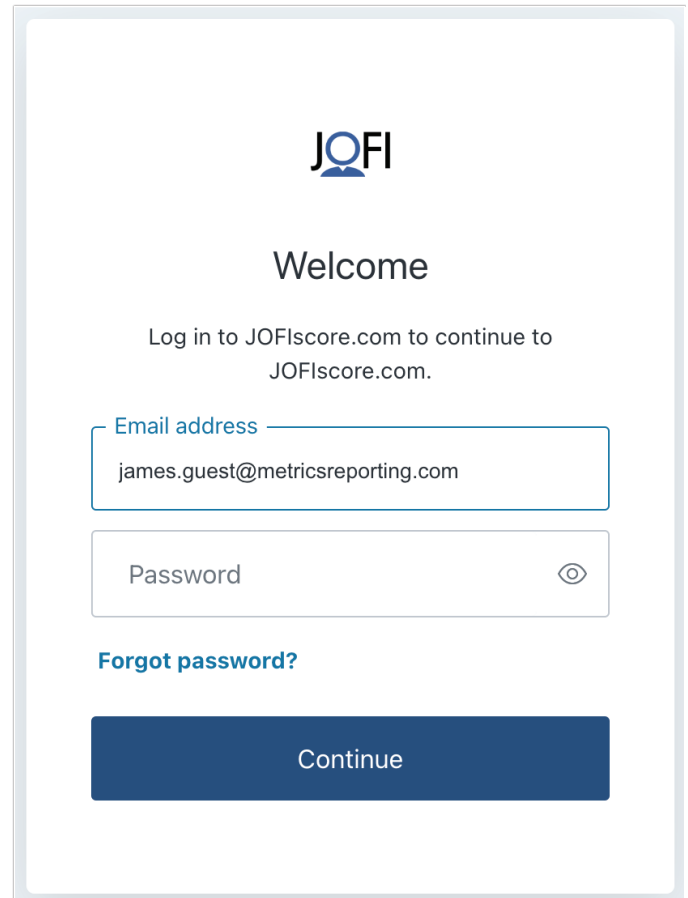
Test Registration

The JOFI Assessment Management System (JAMS) is the online platform that allows registered users to:

- Invite test takers to complete any of the three JOFI assessments
- View scores against 70 system score profiles that cover the world of work
- Generate JOFI Job Fit reports

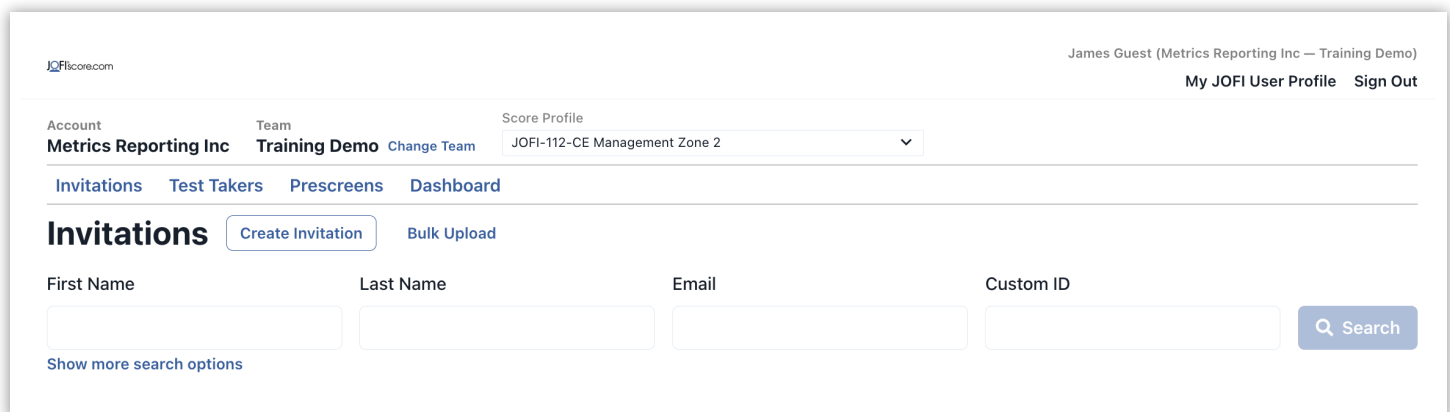
JAMS Dashboard

When you log in to JAMS at www.jofiscore.com, the Invitations menu is your home screen. There are four menu screens: Invitations, Test Takers, Prescreens, and Dashboard.



The screenshot shows the JOFI sign-in page. At the top is the JOFI logo. Below it is the word "Welcome". The text "Log in to JOFIscore.com to continue to JOFIscore.com." is centered. There are two input fields: "Email address" with the value "james.guest@metricsreporting.com" and "Password" with an eye icon. A link "Forgot password?" is below the password field. A large blue "Continue" button is at the bottom.

Figure 1: Sign-in page



The screenshot shows the JOFI dashboard. At the top left is the JOFIscore.com logo. At the top right is the user name "James Guest (Metrics Reporting Inc — Training Demo)" and links "My JOFI User Profile" and "Sign Out". Below this is a navigation bar with "Account Metrics Reporting Inc", "Team Training Demo" (with a "Change Team" link), and "Score Profile JOFI-112-CE Management Zone 2" (with a dropdown arrow). Below the navigation bar are tabs for "Invitations", "Test Takers", "Prescreens", and "Dashboard". The "Invitations" tab is active. Below the tabs are buttons for "Create Invitation" and "Bulk Upload". There is a search form with fields for "First Name", "Last Name", "Email", and "Custom ID", and a "Search" button. A link "Show more search options" is below the search form.

Figure 2: Invitations Menu

How to Create New Invitations

From the Invitations menu you can create, send and edit invitations. To create an invitation, click New Invitation (see the Create Invitation box in Figure 2).

Fill out the invitation form and choose the assessments you would like to assign. You can choose to send the invitation by email, text message, or both. JOFI assessments are optimized for mobile phones. (See Figure 3)

If you have set relevant defaults (see below), these will auto-populate in your new invitations.

The Prescreen is used as a first stage for jobs with high volumes of applicants and is not used simultaneously with the other three core assessments.

When required fields are complete, you will be able to Create Invitation.

Figure 3: The Create Invitation form

The Invitation Menu will then begin to track the status of your invitations. When test takers Accept and begin an assessment, a test taker record will be created and will be accessible from the Test Taker menu.

NAME	CUSTOM ID	STATUS
Guest, James jwguest5040+4@gmail.com (972) 983-3788 Created Sep 29, 2020	TEST20200929A	Sent
Guest, James jwguest5040+1@gmail.com Created Jul 30, 2020	TEST07302020	✓ Accepted Jul 30, 2020
Guest, Jimmy jwguest5040+1129@gmail.com (972) 983-3788 Created Nov 29, 2021		✓ Accepted Nov 29, 2021

Figure 4: Invitations menu with recent records

Editing Test Taker Information or Re-assigning Tests

To modify test taker information or to assign an additional test or a retake, go to the Test Taker menu.

Click on the Test Taker's name or the View/Edit button to get to the Test Taker Record.

The screenshot shows the 'Test Takers' menu in the JOFI interface. At the top, there are navigation tabs: 'Invitations', 'Test Takers', 'Prescreens', and 'Dashboard'. Below these are search filters for 'First Name', 'Last Name', 'Email', and 'Custom ID'. A search button is on the right. Below the filters, there are buttons for 'Export (3)', 'Group Development Report (CSV)', and 'Group Personality Report'. The main area is a table with columns: NAME, TESTS, STATUS, 5-STAR, and VIEW TEST TAKER. The table lists three test takers: 'Guest, Jimmy' (jwquest5040+1129@gmail.com), 'Guest, Jimmy' (jwquest5040+1214@gmail.com), and another 'Guest, Jimmy' (jwquest5040+1129@gmail.com). Each row has buttons for 'View Scorecard', 'View Job Fit', and 'View / Edit'.

Figure 5: The Test Taker menu

The screenshot shows the 'Jimmy Guest' record page. It has sections for 'Basic Info', 'Links', 'JOFI Assessments', 'Career Navigation Profile', and 'Invitation Details'.
Basic Info: Name: Jimmy Guest, Email: jwquest5040+1129@gmail.com, Phone: (972) 983-3788, Custom ID: -, Team: Training Demo Change Team.
Links: Assessment Link: https://www.jofiscore.com/welcome/1a5f8c39-71c3-4a3e-8dab-c80a4b5c4339, Navigation Link: https://www.careernavigation.org?c=cojine.
JOFI Assessments: JOFI Career Interests: Not started, JOFI Personality Traits: Completed in English on Jul 10, 2023 2:39 pm, JOFI Personality Traits: Completed in English on Feb 7, 2023 10:48 am.
Career Navigation Profile: Progress: 0%, Exercises: 0 out of 23 exercises have content, Job Search Zip Code: -, Compare: Occupation 1: -, Occupation 2: -, Occupation 3: -, Plan: Job 1: -, Job 2: -, Job 3: -.
Invitation Details: Created: Nov 29, 2021 11:16 am, Accepted: Nov 29, 2021 11:17 am, Invited By: James Guest (james@jofiscore.com), Send Via: Email to jwquest5040+1129@gmail.com, Text message to (972) 983-3788, Emails Sent: New Tests Assigned email sent to jwquest5040+1129@gmail.com (Jul 10, 2023 2:35 pm), Text Messages Sent: New Tests Assigned text message sent (Jul 10, 2023 2:35 pm), Invite Template: JOFI Default Template.

Figure 6: A Test Taker record

From the Test Taker record, you can make any necessary edits:

- Update contact information, including email
- Copy and paste links to take assessments or access the careernavigation.org website
- See Test history and assign additional tests (see Figure 7). If you re-assign tests, make sure to select "Use for Scoring" on the most recent scores when the test taker finishes the assignment.
- Edit initial invitation details and resend invitations (if necessary)

The screenshot shows the 'Assigned Tests' modal window. It has a 'Basic Info' section for 'Jimmy Guest (jwquest5040+1129@gmail.com)'. Below is a table with columns: DATE ASSIGNED, TEST, STATUS, and USED FOR SCORING.

DATE ASSIGNED	TEST	STATUS	USED FOR SCORING
2023-02-08 9:16 am	JOFI Career Interests	Not Started	
2023-07-10 2:35 pm	JOFI Personality Traits	Completed on 2023-07-10 2:39 pm	Use for Scoring
2021-11-29 11:17 am	JOFI Personality Traits	Completed on 2023-02-07 10:48 am	✓

Below the table is an 'Assign Additional Tests' section with a dropdown menu showing 'JOFI Personality Traits' and an 'Assign' button. There is also a 'Close' button at the bottom right.

Figure 7: Edit Assigned Tests

How to use the Bulk Upload Feature

Some organizations have jobs that attract very high volumes of applicants. The bulk upload feature allows users to invite large pool of applicants efficiently. From the Invitations menu, click Bulk Upload. (See Figure 2, to the right of the Create Invitation button.) A set of simple instructions will appear on the screen to guide your use (see Figure 8).

Account: Metrics Reporting Inc | Team: Training Demo | Change Team | Score Profile: JOFI-112-CE Management Zone 2

Invitations | Test Takers | Prescreens | Dashboard

Dashboard / Invitations / **Bulk Upload**

Bulk Upload Invitations (.csv)

1 Step 1 Upload File —
 2 Step 2 Review Data —
 3 Step 3 Invitation Settings —
 4 Step 4 Send

Instructions

1. [Click here to download the template \(.csv\)](#)
2. Replace the example data with your own, then save the file. Note that only first_name, last_name, and email are required. [Learn more](#)
3. Ensure that the file contains no formatting, and that none of the email addresses have been automatically converted to links (Excel will do this sometimes). All of the values in the file should be plain text.
4. Upload the file by selecting it below
5. Confirm the data, then click Send Invitations

Select a CSV file

No file chosen

Figure 8: Bulk invitation upload instructions

How to Search for Scores

Each of the main menus – Prescreen, Test Takers, and Invitations – has a search bar. You can select “load the most recent 50” to display the relevant records.

The expanded list will show test taker names, tests assigned, the status of these tests, and the five-star rating for the selected score profile.

Account: Metrics Reporting Inc | Team: Training Demo | Change Team | Score Profile: JOFI-112-EC Management Zone 2

Invitations | Test Takers | **Prescreens** | Dashboard

Training Demo / Prescreens

First Name: |
 Last Name: |
 Email: |
 Custom ID:

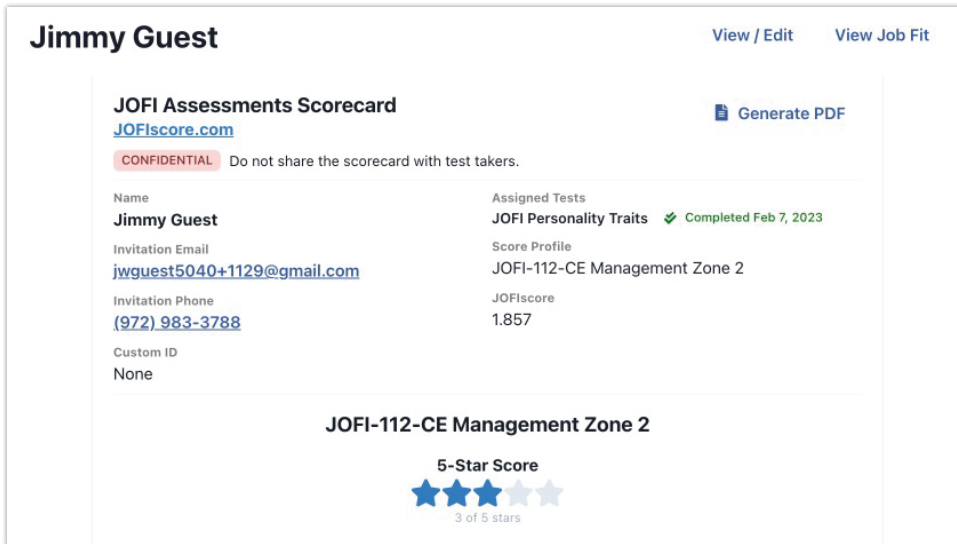
Show more search options

Loading...

Figure 9: Search bar

How to Generate PDFs of Score Profiles or Job Fit Reports

From the Test Taker menu, choose either View Scorecard or View Job Fit on the right for a particular test taker to open that test taker’s scorecard. (See Figure 5)



At the top right of the scorecard is a button to Generate PDF. Clicking once will generate the form, and, when ready, a second click will download it. (Note you can go to the Test Taker record or the Job Fit reports from here too.)

Figure 10: Top of the Scorecard, with Generate PDF near the upper right.

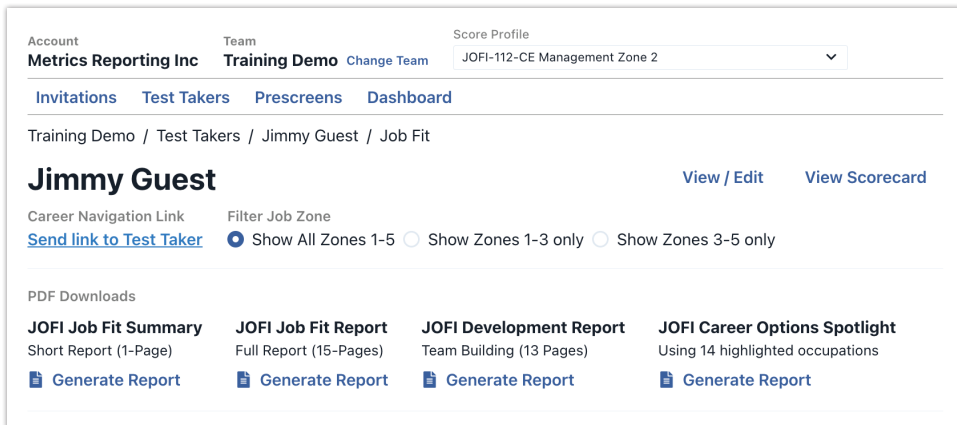


Figure 11: The Job Fit Report options

For general guidance on the use of Scorecards and Job Fit Reports, note:

- Individual scorecards are not shared with candidates or career navigation participants.
- Scorecards are for recruiters and coaches only and should be treated as confidential employee / client / student records.
- The JOFI Job Fit Report is designed to be shared with test takers.
- JAMS allows Users to send test takers a link to download any one of the three JOFI Job Fit reports.

JOFI Default Settings for Users

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 My JOFI Profile in the upper right-hand corner after you have signed into JAMS.

The screenshot shows the JAMS landing page. At the top right, the user is identified as 'James Guest (Metrics Reporting Inc — Training Demo)'. Below this, there are links for 'My JOFI User Profile' and 'Sign Out'. The main navigation bar includes 'Account Metrics Reporting Inc', 'Team Training Demo', and 'Score Profile JOFI-112-CE Management Zone 2'. Below the navigation bar, there are tabs for 'Invitations', 'Test Takers', 'Prescreens', and 'Dashboard'. The 'Invitations' section is active, showing a 'Create Invitation' button and a 'Bulk Upload' link. Below this, there are search fields for 'First Name', 'Last Name', 'Email', and 'Custom ID', along with a 'Search' button and a link to 'Show more search options'.

Figure 11: JAMS landing page with “My JOFI User Profile” in the upper right

At the top of the profile we include JOFI User’s contact information, dates that Training Modules were completed, and Certification Status. Certification is available to anyone who has completed Modules 1, 2A OR 2b, and 3. Inquire at support@jofiscore.com for details. Contact us at the same address if you need to update any contact details.

The screenshot shows the 'My JOFI User Profile' page. It is divided into three main sections: 'User Details', 'JOFI Training Modules', and 'JOFI Training Certifications'.

User Details
 Contact your account admin or JOFI support to change your user details.
 Name: James Guest
 Email: james@jofiscore.com
 Phone: -
 Account: Metrics Reporting Inc

JOFI Training Modules

TRAINING MODULE	COMPLETED DATE
JOFI Module 1 JOFI Assessment Management System Quick Start Training	Feb 5, 2025
JOFI Module 2A JOFI Essentials for Skills-Based Hiring	
JOFI Module 2B JOFI Essentials for Career Navigation	Feb 6, 2025
JOFI Module 3 JOFI Job Fit Theory and Advanced Score Interpretation	

JOFI Training Certifications

<p>JOFI User Certification Certification confirms user proficiency based on a 50-item Q&A session with the JOFI Product Manager. Reference Product Sheet 16 for details.</p> <p>Not yet earned</p>
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Figure 12: JOFI User data

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.

Notifications
 Email me when test takers complete all assigned tests

Teams
 Choose your default team

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

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

James W. Guest
 JOFI Product Manager
 james@jofiscore.com

Figure 13: Notifications, Default Team, and Signature settings.

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

Create a Scheduling Link

Name / Description	Link	
Calendar Openings	https://www.calendly.com/12345	<input type="button" value="Create"/>

Invitation Defaults
 Send me a copy of invitation emails

TEMPLATE	
Invite: JOFI Career Navigation with JFR	Default
Invite: JOFI Skills-Based Hiring with JFS	Make Default
Invite: JOFI Team Building with JDR	Make Default
Invite: JOFI Career Navigation Quick Start	Make Default

Figure 14: Scheduling links and Invitation defaults

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 next to the Team identification in Figure 11) 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.

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.

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 that have been turned on for your account. 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).

Congratulations Emails

Send me a copy of test takers' congratulations emails

TEMPLATE

Congrats: JOFI Career Navigation with JFR	Default
Congrats: JOFI Skills-Based Hiring with JFS	Make Default
Congrats: JOFI Team Building with JDR	Make Default
Congrats: JOFI Career Navigation Quick Start	Make Default
Congrats: CN STANDARD with JFR <small>Training Demo, JOFI Assessments Support, James Guest Demo, Bill Guest Demo</small>	Make Default
Congrats: SBH STANDARD with JFS <small>Training Demo, JOFI Assessments Support, James Guest Demo, Bill Guest Demo</small>	Make Default

Tests

Choose the tests that should be checked by default

JOFI Quick Prescreen

JOFI Personality Traits

JOFI Thinking Skills

JOFI Career Interests

Figure 15: Congratulations emails and Test defaults

Score Profiles

CODE	SCORE PROFILE	
JOFI-112-CE	Management Zone 2	DEFAULT
JOFI-113-CE	Management Zone 3	Set as Default
JOFI-113-ES	Management Zone 3	Set as Default
JOFI-114-AE	Management Zone 4	Set as Default
JOFI-114-CE	Management Zone 4	Set as Default
JOFI-114-EI	Management Zone 4	Set as Default
JOFI-114-ER	Management Zone 4	Set as Default
JOFI-114-ES	Management Zone 4	Set as Default
JOFI-115-CE	Management Zone 5	Set as Default
JOFI-115-EI	Management Zone 5	Set as Default
JOFI-115-ER	Management Zone 5	Set as Default
JOFI-115-ES	Management Zone 5	Set as Default
JOFI-132-ES	Business and Financial Zone 2	Set as Default
JOFI-133-CE	Business and Financial Zone 3	Set as Default
JOFI-133-CR	Business and Financial Zone 3	Set as Default
JOFI-133-IR	Business and Financial Zone 3	Set as Default

Figure 16: A list of Score Profiles

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