NATIONAL CONNECTOR PROGRAM | PROGRAMME DE CONNECTEUR NATIONAL

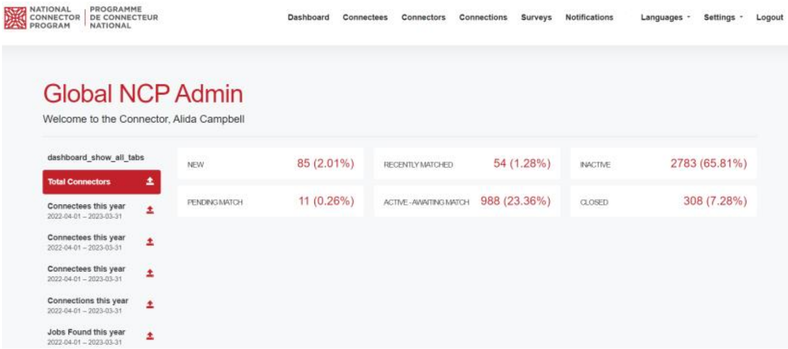
Tracking System Training Guide - 2022

1675 Grafton Street
Suite 701, North Tower
Halifax, NS, B3J 0E7

Welcome to the Tracking system training guide. This guide will take you through the tracking system. If you would like visual representation of how to work the tracking system – please visit the Tracking System Training Video.

Getting Started

You arrive in the Tracking System in your Dashboard. This shows you all of your Connectees, Connectors, and Connections. It also shows you how close you are to reaching the targets you set out when you registered with the tracking system.



Everything you need is listed at the top – Dashboard, Connectees, Connectors, Surveys, Notifications, Settings and Logout.

Connectees

The Connectees page allows you to see everything connected with your Connectees, and to add and update their information. It also tells you how many connectees your community has, and the number of connections. You can run reports from this page including:

- Number of connectees in a given date range (convenient for reporting purposes)
- Connectees by stream, industry, status, referral type etc.

Adding Connectees

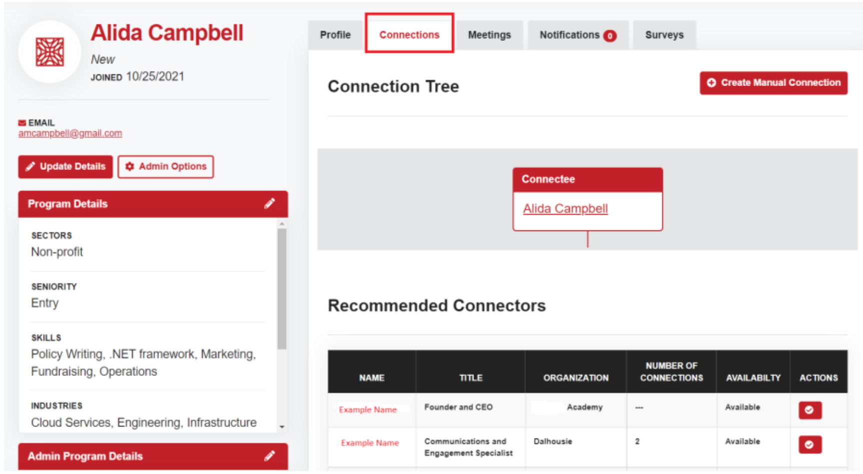
To add a Connectee, click “Add a Connectee” in the upper right-hand corner. You will see this screen. Fill in the information and hit “create”. Once created, use the search function by their name at the top of the page, and go to their profile.

Once in their profile, on the left-hand side, update their information in the Program Details and Admin Program Details. Make sure to fill in 5 Skills and 3 industries to allow the tracking system to match the Connectee. You can rank the skills and industries from most to least applicable.

Tip: *Put the Connectees Resume into the Notes Section. This is text searchable, so if you are looking for someone with a specific skill – say “Project Management” they will come up if you search “Project Management” on the first page.*

If you don't already have a Connector in mind for your Connectee, wait 24 hours for the Algorithm to work, and the next day, you will see possible connections in the "Connections" tab at the top of the Connectees profile.

If you know who you would like to connect the Connectee to – use the "Create Manual Connection" button and log the information there.



Use the "Update Details" Button on the left-hand side to change the Status of a Connectee. You can choose new, awaiting match, pending match, matched, connection successful, found job, or closed. Found a job is important, as that allows you to search for the number of Connectees that have found jobs in the given reporting period.

Tip: *Use LinkedIn to find out who has found a job. If they aren't answering you emails, they will most likely have updated their LinkedIn profile!*

Connectors

The exact same process is to be followed for a Connector as a Connectee. With Connectors, as you are going to be matching them more than once, you can add their availability in the notes section. Options like "Matched on 6/16/2022 – do not match again until January 2023." Or "Match every month – matched 2/6/22."

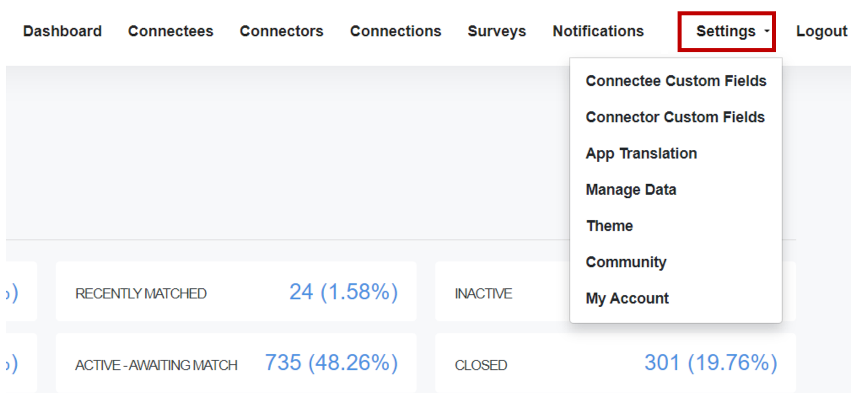
Tip: *If you are dealing with businesses, you might want to try adding a Business as a Connector. When you send them resumes, or complete events with them, you can log that activity under their "Connector" profile. Then you can run reports on the business and inform them annually of what the program did for them. For example, gave them access to 50 Connectees as potential hires, held three speed networking/hiring events with them etc. Be sure to add BUSINESS to the Connector name.*

Connections, Surveys, and Notifications

These sections are not being used currently in the database; you do not need to worry about them.

Settings

There are a number of options within the Settings tab that are important to the effective usage of the tracking system.

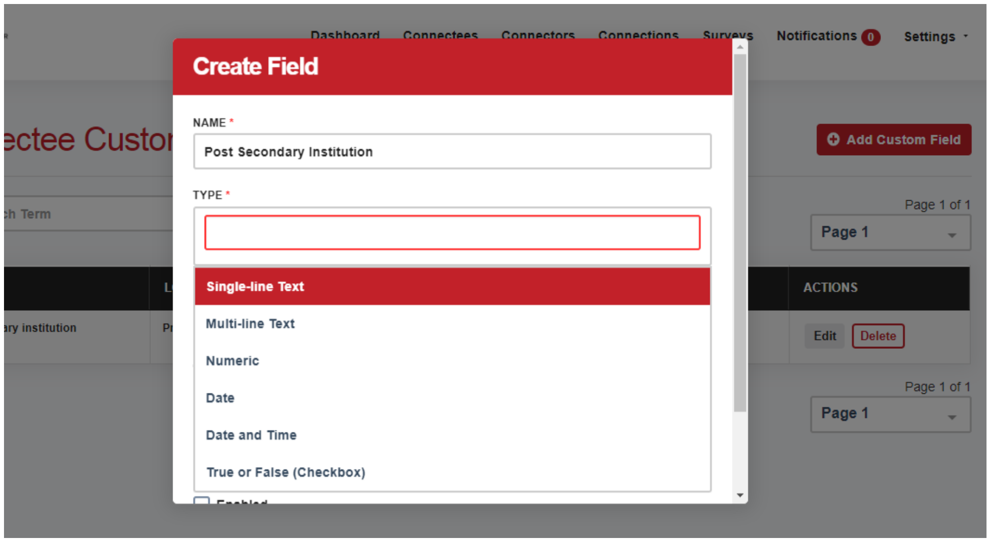


Connectee/Connector Custom Fields

In this system you can add custom fields on either the Connectee or Connector tabs. This is to gather additional information you may want for your program. For this example, we will add a custom field on the Connectee tab about what post-secondary institution Connectees attended. **Please note:** Custom fields cannot be added to the algorithm, it is solely for data collection purposes and will not affect the matching process.

To add a custom field, click on Settings and choose either "Connectee Custom Field" or "Connector Custom Field." Click on "Add Custom Field" to get started.

Creating a new field is easy. Add the name, type (you can choose from numeric, date, single line text, multi-line text, true or false, etc.)



Next is location. This is where you would like the custom information to show on the Connectee/or profile. Finally, click to enable if you want this to be a required field that Connectees or Admin users must input, if you want it included to the "Add Connectee" form and then finally you need to click to enable the new field.

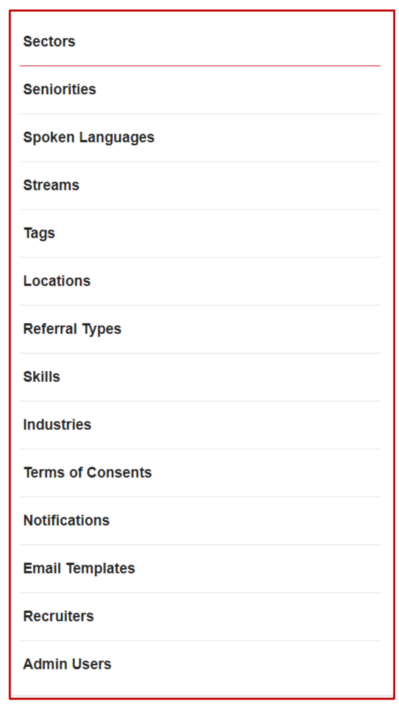
You can then see it in the location you selected on any Connectee/or profile and will be able to filter and search for this custom field from the tab of choice.

Manage Data

The Manage Data field is where you can really customize the tracking system to your community. Each section has a generic addition from the National Connector Program. You can customize this to your own community. However, take note, when you add a skill, sector, industry etc. The algorithm will not pick it up until it has been added on a number of people. If you are a new community, begin by adding industries or skills. If you are an established community, adding skills might not lead to positive results right away.

Sectors include non-profit, public and private. Seniorities are entry-level, mid-level, senior, and executive. Spoken Languages are listed as English and French.

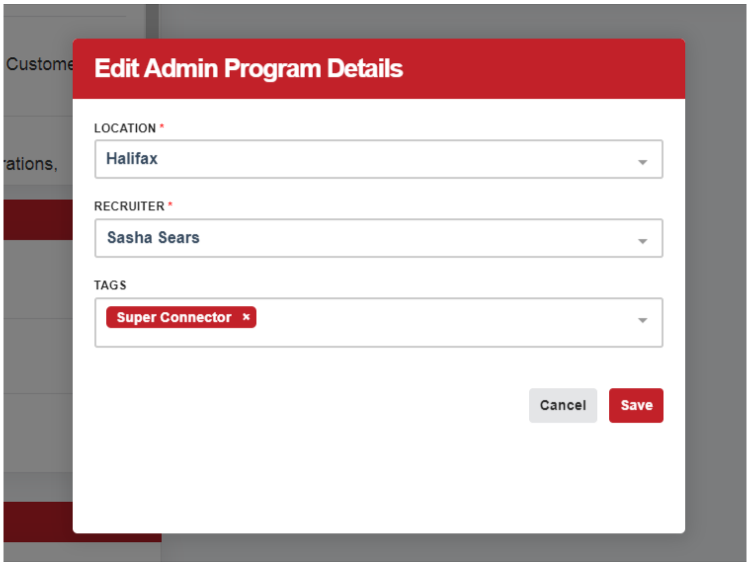
Streams indicate how you would like to categorize your connectees. Do you only work with newcomers? International graduates? Domestic Graduates? Do you work with a specific group or organization and would like to count those Connectees in a certain way? Then a stream is a great way to accomplish that.



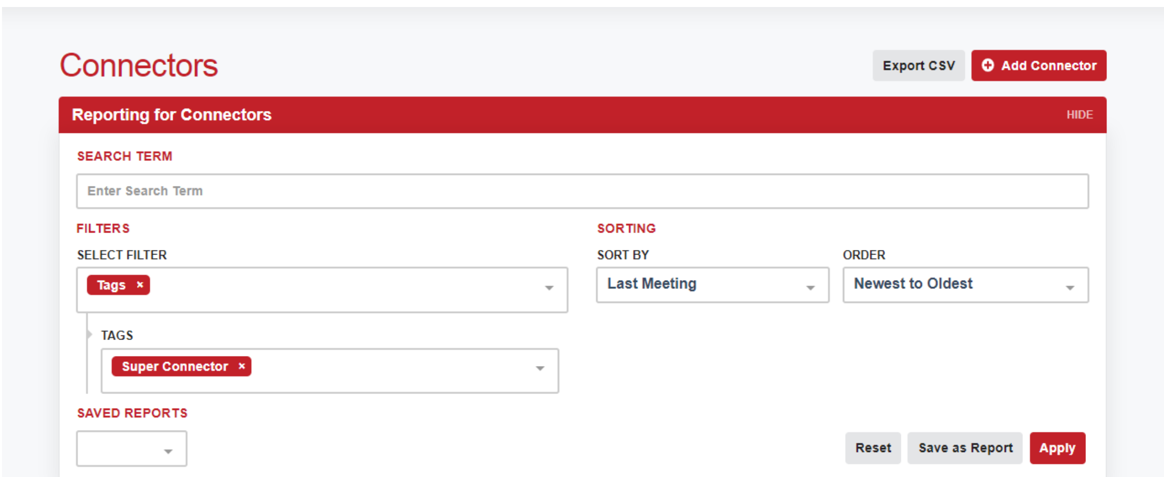
Tags can be used to further categorize your Connectees/ors based on certain events, or sub-groups that you may want to quick search later. Some tags you may find useful include:

- "Super Connector"
- "Connector Organization"
- "Speed Interview November 2018" or "Connector Appreciation Event 2017" (as an example – these capture anyone that came to these particular events)

Once you have added the new tags into the system, you can then add them to any profile by going into a Connectee/Connector profile, clicking the pencil icon on the "Edit Admin Program Details," select the tag(s) you wish to use and then click save.



To search for the profiles with the tags you've included, choose the Connectee or Connector tab, filter by tags and then choose the tag(s) you'd like to see. Click "Apply" and the search will populate with anyone with that tag(s). You can then export to csv and save as an excel file if you would like to manipulate the data further. Locations are helpful if you operate in a larger geographical area, or if you operate in several cities. You can choose to add locations based on your activities.



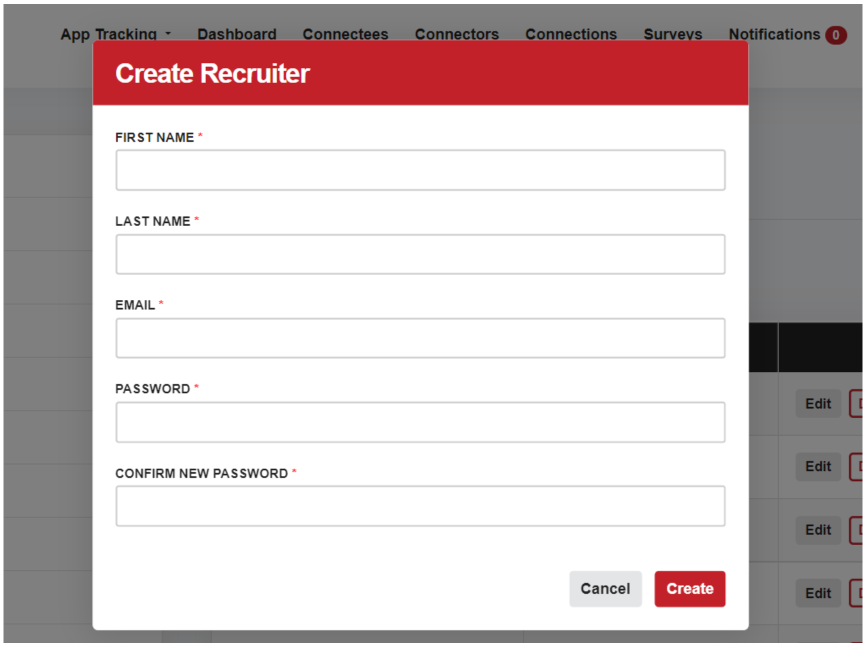
Referral types might include partners or organizations, higher education institutions, or even events you regularly attend such as annual career fairs or speed networking events you hold.

Skills and Industries have been added to your community already and are fairly extensive. Remember if you add a skill or industry, until more than one person has that skill, the algorithm will not match it. So, remember to add skills and industries only if you are certain it will not fit under anything else.

You can add your own Terms of Consent to the Tracking system and send them from there. But you can also send them along with the Connectee and Connector Toolkit. It is up to you and what works best for you.

The Tracking system no longer has Connectees and Connectors coming into the system, thus the notifications and emails have been disabled. Please do not use these.

Recruiters and Admin Users are those that work for the Connector Program. **Please do not delete any past users or recruiters.** If you are the Program Coordinator, you are listed as an admin user. You can also have recruiters if you have a larger team working on the program. If you have hired someone on, please you can click on “Add Recruiter” in the upper right-hand side and fill in the information in the picture. Click create, and they will receive an email inviting them to login to the tracking system with their email and the password you have created for them.



Theme

The Theme is the colour scheme. If you wish to change it, you can.

Community

This is all the information about the community that was entered in when it was originally set up on the tracking system. You can edit by clicking the button on the upper right-hand side. This is also where you can edit the targets you have set out for Connectees and Connectors. If your targets have changed, edit them here, and you’ll see this change reflected in your dashboard.

My Account

My account is your personal account. You can change your password here or edit your username.

Conclusion

If you would like a visual representation of everything in this document, there is a training video also available on the tracking system. If you have any questions about anything you have read or have tried something in the tracking system and it hasn’t worked as expected, please contact the NCP Program manager.