

symlr Desktop Tools

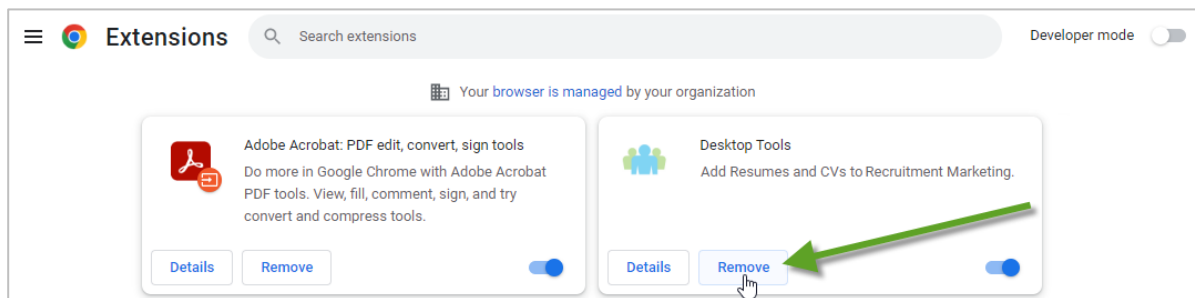
The symlr Talent Sourcing Desktop Tools is a browser plug-in which allows you to “scrape” someone found on the internet, or in a non-integrated resume database, and import them as a Candidate into Talent Sourcing.

Note: *Desktop Tools is only available to users of the Chrome web browser, or Microsoft Edge using the Chrome browser plugin.*

Removing the Previous Browser Extension

If you’ve been using an old version of the HealthcareSource or Talemetry Desktop Tools extensions, you’ll first need to uninstall that outdated extension (also referred to as a plugin) from your web browser(s). This is done by following these steps:

1. Select the vertical ellipsis in the upper-right corner of the browser window to open Chrome’s options menu.
2. Select **More Tools > Extensions** to display your *Extensions* page. This page lists out all the browser extensions currently installed. The blue or grey toggle switches indicate whether each is enabled in the menu bar.



3. Locate the **Desktop Tools** extension and select **Remove**. A popup displays to confirm this removal.
4. Selecting **Remove** from this pop-up removes the extension.

Desktop Tools no longer displays on the *Extensions* page, and you can now install the new version.

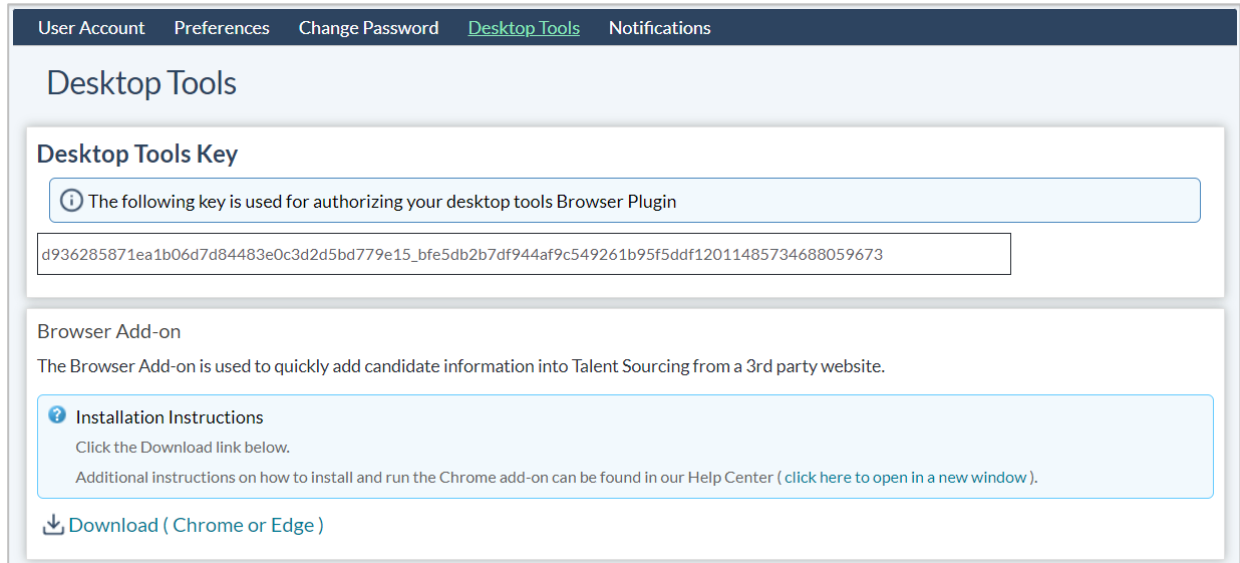
Installing the New Browser Extension

To use the new Desktop Tools, you’ll first need to install its extension (also referred to as a plugin) to your web browser(s). This is done by following these steps:

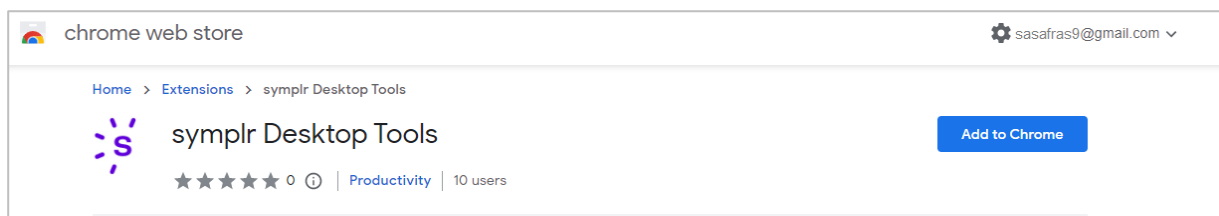
1. Open the Chrome web browser and log in to symlr Talent Sourcing. In the upper-right corner next to your name is a drop-down menu (displayed as a vertical ellipsis) containing a **Settings** option.

2. Select **Settings** to display your *Account Settings* page.
3. Select **Desktop Tools** from the row along the top to display the *Desktop Tools* page.

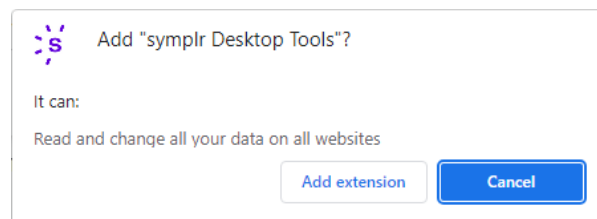
This page contains two sections. At the top is your **Desktop Tools Key**, a long string of characters which acts as an authenticator for the Desktop Tools plugin.



4. Highlight and copy the Desktop Tools Key and paste it into a text or document file to have on-hand. You'll need to enter it later in the installation process. The second section, **Browser Add-On**, provides a link to download the extension.
5. If your browser is supported, the **Download (Chrome)** link displays on this page. Selecting this opens the symplr Desktop Tools extension overview in the Google Chrome Web Store.



6. Selecting **Add to Chrome** installs the extension to your Chrome (or Chrome-enabled) browser. You are prompted to accept permissions for symplr Desktop tools to read and change data on websites.



7. Select **Add Extension** from this pop-up. After successful installation, the button text changes to **Added**, and there is now a new button (the symplr logo) along your browser menu bar called **Add to symplr**. You don't even need to restart your browser!

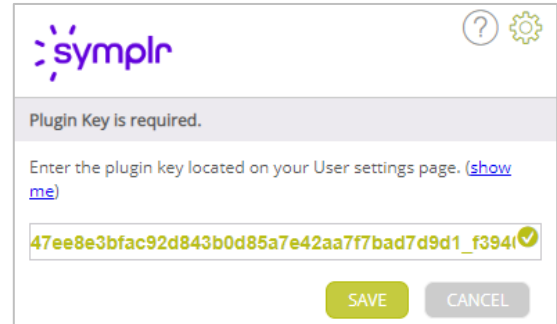
Note: *If the icon doesn't appear on its own, selecting the jigsaw icon reveals it in a menu.*



- Clicking the symplr button for the first time prompts you to enter your Desktop Tools Plugin Key. If you didn't copy it, it's still available from the *Desktop Tools* page.
- Select and copy your key, then paste it into the **Plugin Key** field in the Desktop Tools prompt.

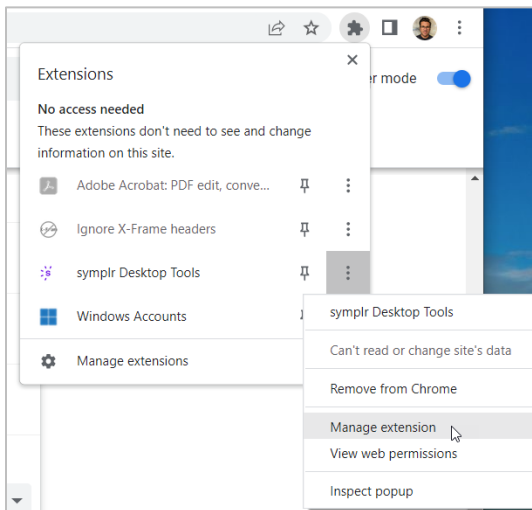
If the key has been entered correctly, a green checkmark appears indicating it is validated. You can **Save** the key, then begin processing any resumes you may find during your online searches.

Note: *If the key has an error or is otherwise invalid, a red **X** displays, and you cannot save the key. Try again, ensuring you have copied the entire key without missing any characters (or adding any more, including spaces).*



The screenshot shows a web form for entering a Plugin Key. At the top left is the symplr logo. To the right are a help icon (question mark) and a settings icon (gear). Below the logo is a grey header bar with the text "Plugin Key is required." Underneath, there is a text input field with the placeholder text "Enter the plugin key located on your User settings page. ([show me](#))". The input field contains the key "47ee8e3bfac92d843b0d85a7e42aa7f7bad7d9d1_f394i" followed by a green checkmark icon. At the bottom right of the form are two buttons: a green "SAVE" button and a grey "CANCEL" button.

- Click the menu icon for symplr Desktop Tools plug-in and select the **Manage extension** option. This opens the settings page for the plug-in in a new browser tab.



- Locate and enable the **Allow access to file URLs** option.



With the Desktop Tools installed and configured, you can add candidates to symplr Talent Sourcing using the Chrome extension.

Adding Candidates Using Desktop Tools

The Desktop Tools feature is integrated with your web browser, and can be used wherever candidate data is on display by following these steps:

1. While using the Chrome browser, find a candidate profile or resume you want to add to Talent Sourcing, and highlight any information you want to import.
2. Select the **Add to symplr Talent Sourcing** button, located in the Chrome toolbar.

Note: *Highlighting too much information on the page will produce an error message here. Try and keep any highlighting only on the specific items to import.*

Selecting this button displays the quick review form. This shows you the **First Name, Last Name,** and **Email** (where available— many people choose to keep their email private) the tool extracted. Based on what you selected the last time you added a candidate, it may also show you a folder where the candidate will be saved, a job where the candidate may be saved, and/or a source where the candidate is going to be saved.

3. If all the information is correct, selecting **Save** completes a quick save of the candidate with this extracted data and save settings. The candidate is added to symplr Talent Sourcing, and a confirmation window displays from the browser toolbar.

First Name	Tera
Last Name	Testere
Email	tnorman@symplr.com
Actions (remove)	
Save to Source:	Our Candidate Pool
Save to Folder:	CST Candidates
Save to Folder:	Test Candidates 6.15.22
Save to Job:	COVID-19 TESTER - 4134
Tag:	IT
Tag:	Nursing
Tag:	urgentcare
CANCEL SAVE REVIEW	

Otherwise, if the information is wrong, select **cancel**. Highlight the text you want to save, then select the **Add to symplr Talent Sourcing** button to try again.

Note: *When scraping data from LinkedIn, you will need to select **Review** and confirm candidate details before you can save.*

4. Alternately, choosing **Review** ports this captured data to the *Review* page, where you can manually edit the candidate details. This is useful in case any information is missing, partially correct, you want to change the job/folder/source of the resume, or you want to add your own notes and tags. For more information about the options on this page, please refer to the *Using the Desktop Tools Review Page* section of this document.

Using the Desktop Tools Review Page

The *Desktop Tools Review* page is launched from the Desktop Tools when the user processing a candidate decides they want to review the candidate data. Upon selecting **Review**, a new browser tab launches, displaying a one-time-only review page for the recruiter. The recruiter is not logged into symplr Talent Sourcing, and once the review page is processed successfully, its URL cannot be viewed again.

The screenshot displays the Desktop Tools Review page for a candidate named James Landry. The page is divided into several sections:

- Filters:** Includes 'Add to Folder' (GST Candidates), 'Add to Job' (COVID-19 TESTE...), 'Tags' (IT, Nursing, urgentcare), 'Note' (What an interesting fellow. We should at least interview him.), and 'Add Audience Type'.
- Personal Information:** Lists First Name (James), Last Name (Landry), Street (21 Jump Street), City (Woburn), State (Massachusetts), Zip (01801), Email (jlandr21@gmail.com), Mobile (978-555-1234), and Phone.
- EXPERIENCE:** Shows two roles: 'symplr (formerly HealthcareSource) MA US Software Documentation Specialist' (Mar 2016 - Current) and 'Major Payne Urgent Care Bedford MA US Health Consultant' (Mar 2015 - Jan 2016).
- EDUCATION:** Lists 'University of Massachusetts Lowell University of... MA US B.S. (Information Technology)' (May 2015).
- BIOGRAPHY:** Includes a 'Summary' section with the text: 'A mysteriously capable jack-of-all-trades with a colorful employment history'.

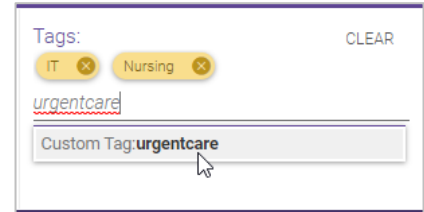
When the Desktop Tools Review page URL is launched in a browser, you will be able to view and modify the following details:

- **Biography.** Add or edit biography information (Summary or Objective). Select **Add** beside *Biography*, or select **Edit** if a *Biography* section has already been extracted.
- **Contact Information.** Add or edit the name, address, phone number(s), and email of the candidate by selecting each field in the *Details* tab. When you are done changing, hit your **Enter** (or **Return**) key to keep your changes, or select another field or tab.
- **Education History.** You can modify any of the Education History information by selecting the **Education History** area in the *Details* tab. You can add a new record, and edit or delete existing records.
- **Folder.** Optional. This field determines the name of the folder(s) where the candidate will be added. Select **Add**, begin typing the name of a folder, then select a folder name to add to it. You can select additional folders to add the candidate to more locations/lists, or remove any already-selected folders by selecting the **x** next to the folder name.
- **Job.** Optional. This determines the job(s) where the candidate will be attached. Click **Add**, type start of a job title or external ID

This screenshot shows the 'Add to Folder' dropdown menu. The selected folder is 'GST Candidates'. Other visible options include 'Birthing Center RN Candidates', 'Brooke 2022 RN BSN Folder', 'June Exec Search (Tony Fitzhugh)', 'New Grad Nurses 6.6.22', 'Nursing (Tony Fitzhugh)', 'Personal Favorites', and 'Personal Favorites (Arm Manager)'. A mouse cursor is pointing at the 'Personal Favorites (Arm Manager)' option.

of a job, and select it to add the candidate. You can select additional jobs to add the candidate to multiple postings, or remove them from already-selected jobs by selecting the **x** next to the job name.

- **Source.** This determines the source of the candidate. By default, it is *Our Candidate Pool*, but if you are sourcing from another specific source (such as a job board or social network), you can change it to the necessary source type.
- **Tags.** You can add tags to a person that can be used in Talent Sourcing for filtering or organizing. Select the **Add tags** field, then start to type a tag. Any matching tags appear and you can select to add them, or continue typing to add a new tag. You can add multiple tags as needed, or remove a selected tag by clicking on the **x** next to the tag.
- **Work History.** You can modify any of the candidate's Work History information by selecting the **Work History** area in the *Details* tab. You can add a new record, and edit or delete existing records.



After reviewing the profile and making any necessary edits, select the green **Save** icon on the right-hand side of the page to complete the candidate import process. After saving the profile, no further edits can be made from this page, and attempts to relaunch or reload the page will display a message stating the candidate has already been saved to the system.

Please contact talentsupport@symplr.com for more information on Desktop Tools.