CAREER CENTER EMPLOYER USER MANUAL

CFA Institute

CAREER CENTER EMPLOYER USER MANUAL

Table of Contents

Employer Support

If you have any questions, please contact Wiley for customer support by email at recruitmentsales@wiley.com or call the applicable regional team:

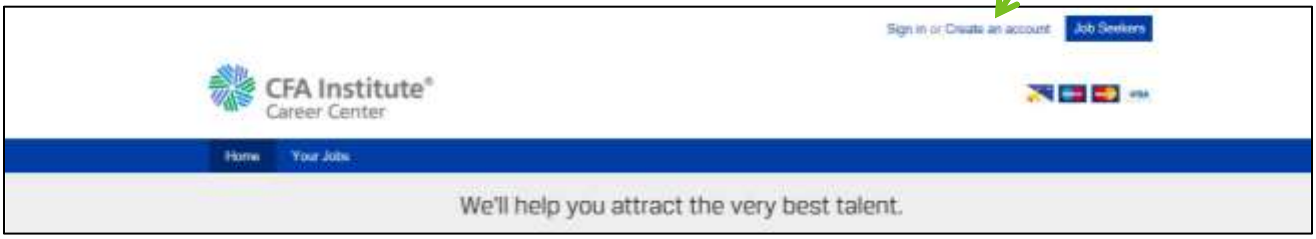
Americas: +1 (978) 609 4215

Europe, Middle East & Africa: +44 (0)1243 772041

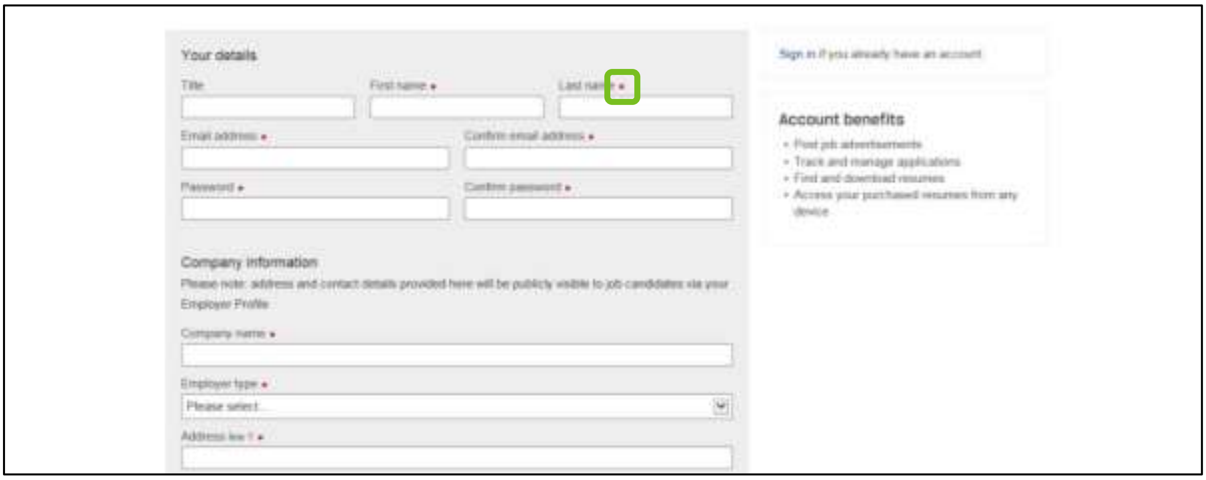
Asia Pacific: +61 3 92743162

Create an Account

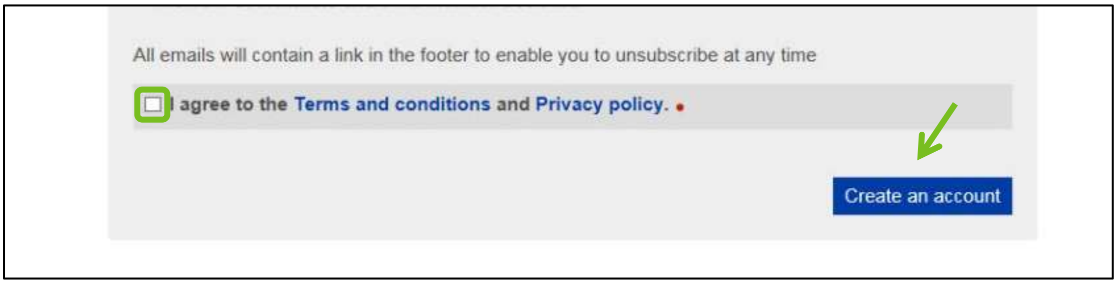
1. Access the Career Center at https://employers.cfainstitute.org/
2. Select the **Create an account** link.



3. Enter all required details as indicated by the red dots.

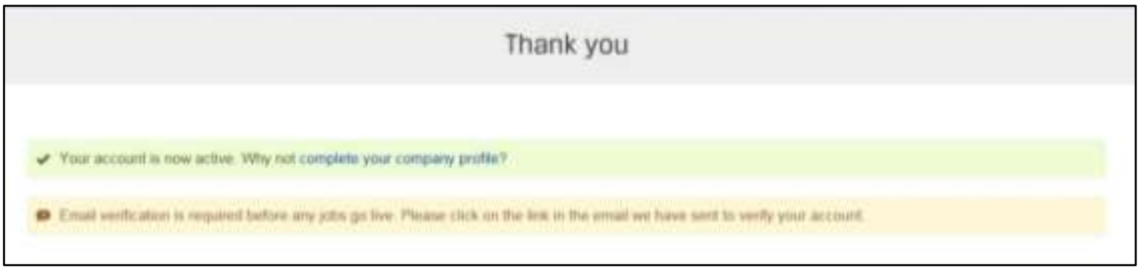


4. Review and agree to our Terms and conditions and Privacy policy by checking the box. Click the **Create an account** button.

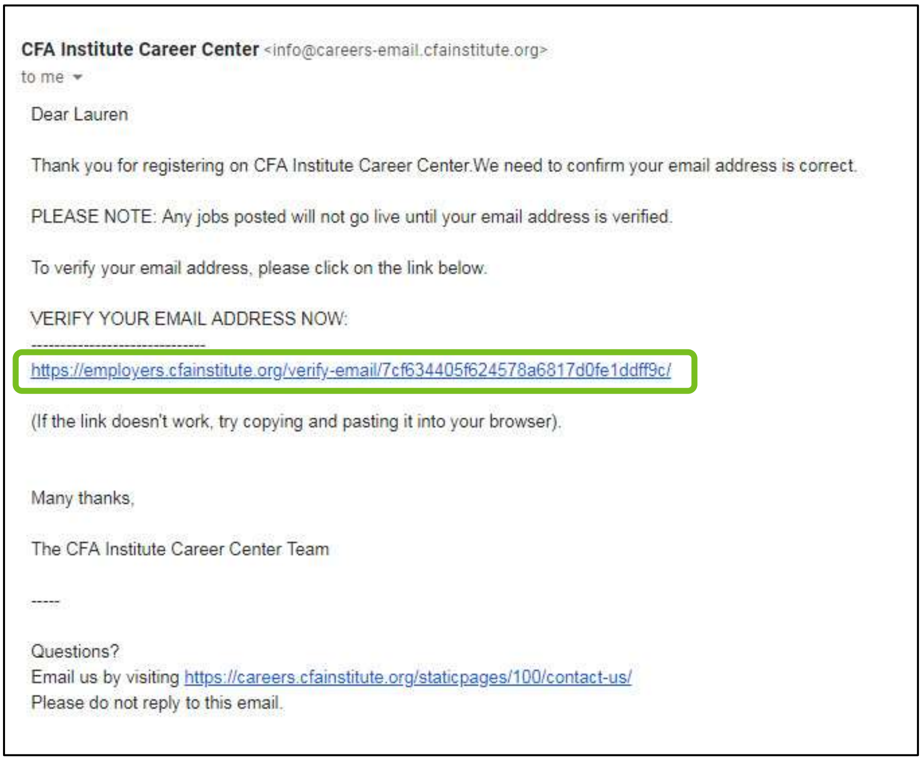


5. As indicated on the Thank you page (A), you'll need to verify your email. Navigate to the inbox of the email you used to register to find the verification email. Click the link in the body of the email to verify your email address (B). *(<u>Note</u>: Check your spam or junk mailboxes if you do not see the email in your regular mailbox. The sender is **CFA Institute Career Center** <info@careers-email.cfainstitute.org>.)*

   A.



B.


CFA Institute Career Center <info@careers-email.cfainstitute.org>
to me

Dear Lauren

Thank you for registering on CFA Institute Career Center.We need to confirm your email address is correct.

PLEASE NOTE: Any jobs posted will not go live until your email address is verified.

To verify your email address, please click on the link below.

VERIFY YOUR EMAIL ADDRESS NOW:
----
https://employers.cfainstitute.org/verify-email/7cf634405f624578a6817d0fe1ddff9c/

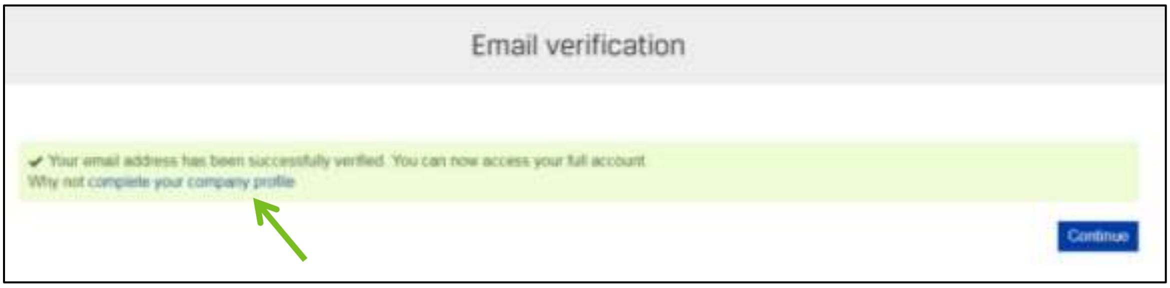
(If the link doesn't work, try copying and pasting it into your browser).

Many thanks,

The CFA Institute Career Center Team

Questions?
Email us by visiting https://careers.cfainstitute.org/staticpages/100/contact-us/
Please do not reply to this email.

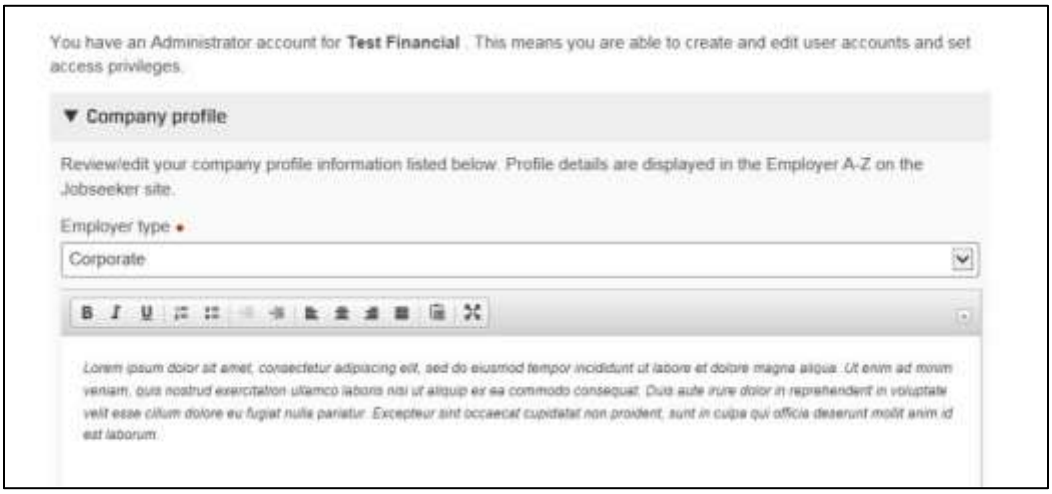
6. A browser will open to confirm your email has been verified. You will have the option to **complete your company profile** by clicking the link. *(Note: You can stop here and complete the profile later if desired.)*



Create a Company Profile

1. If you are not creating your company profile immediately after you've created the account, navigate to the [Career Center](#) Home page to begin and sign in into you company account. Click your company name in the upper right corner to access your company profile.

2. Click the drop-down arrow to enter company information. *(Note: Red dots indicate required fields.)*



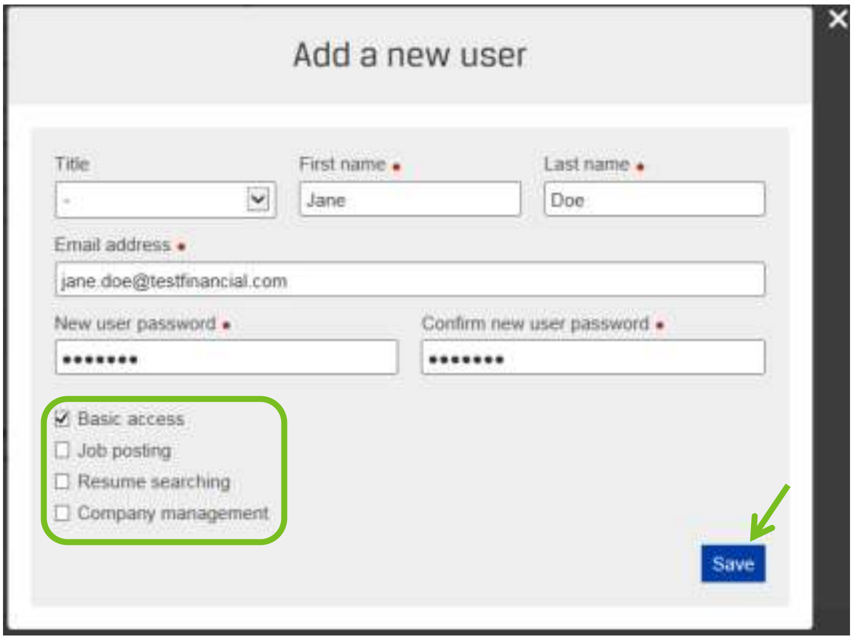
3. Click the **Save details** button when done.

Add User to Company Profile

1. Navigate to your company profile (See step 1 in Create a Company Profile section).
2. Select the drop-down arrow next to **Company users**. Click the **Add new user** button.

3. Enter user details and click **Save**. *(<u>Note</u>: You will need to check at least one of the boxes to denote the new user's level of access.)*

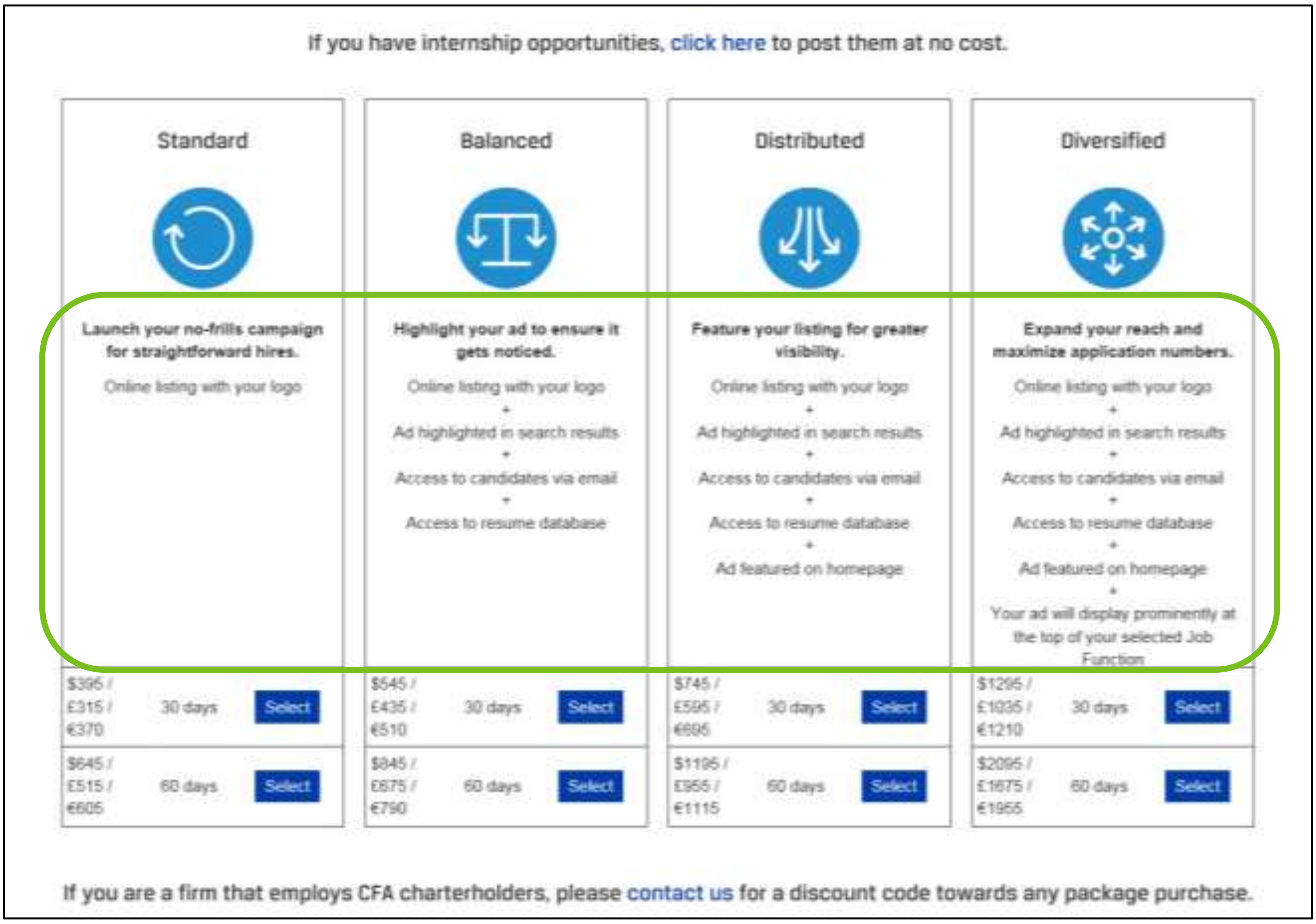
   <u>Access Options</u>:
   - Basic access: grants access to employer services site
   - Job posting: enables the ability to post jobs on behalf of employer
   - Resume searching: enables the ability to search resume database
   - Company management: allows user to manage all company users and edit company profile



Package Options and Features

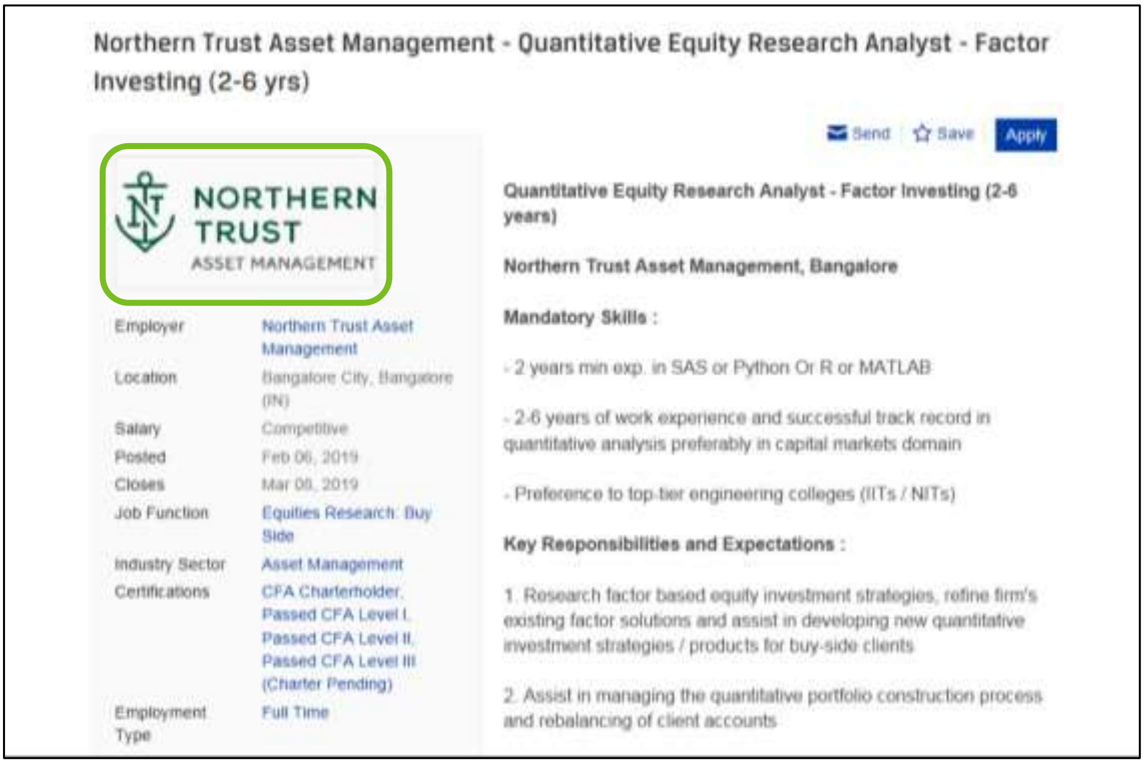
Options

There are 4 packages to choose from when posting a job: standard, balanced, distributed, and diversified. Each contains different features for advertising your job post.

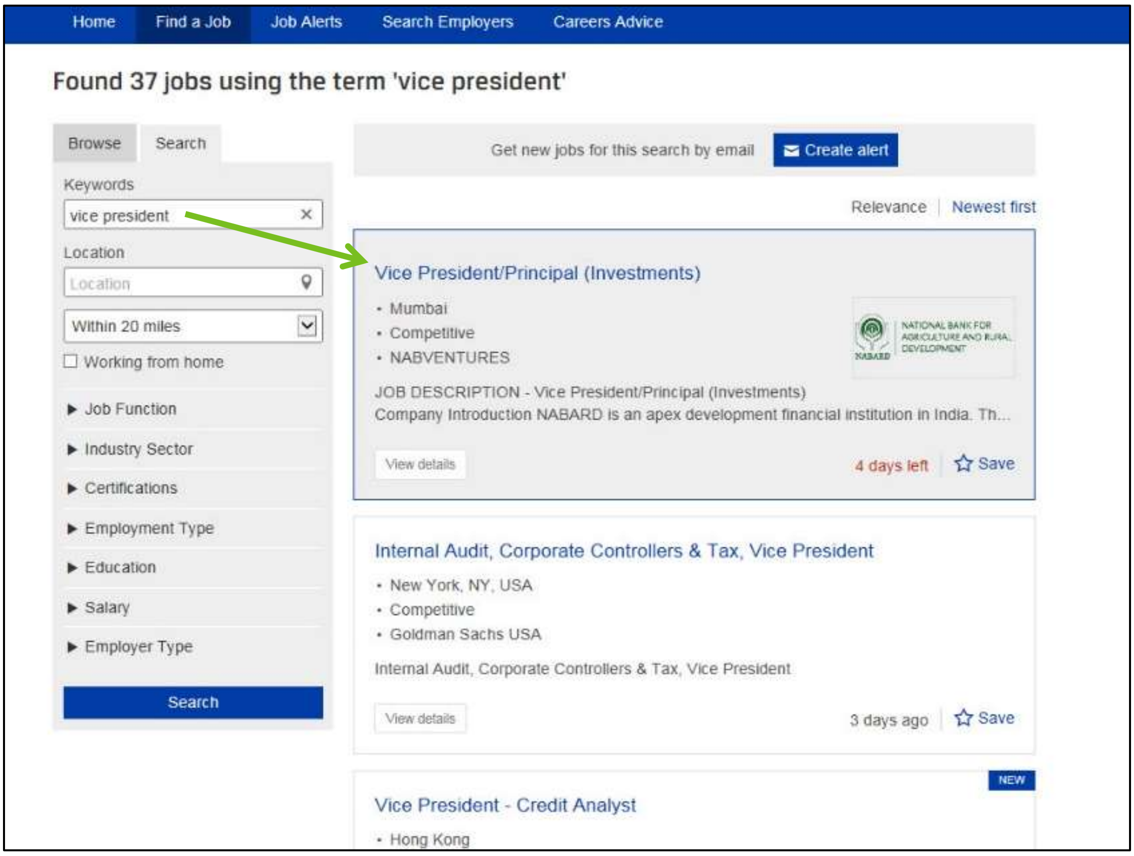


Features

1. **Online listing with your logo:** company logo will be displayed in job posting.



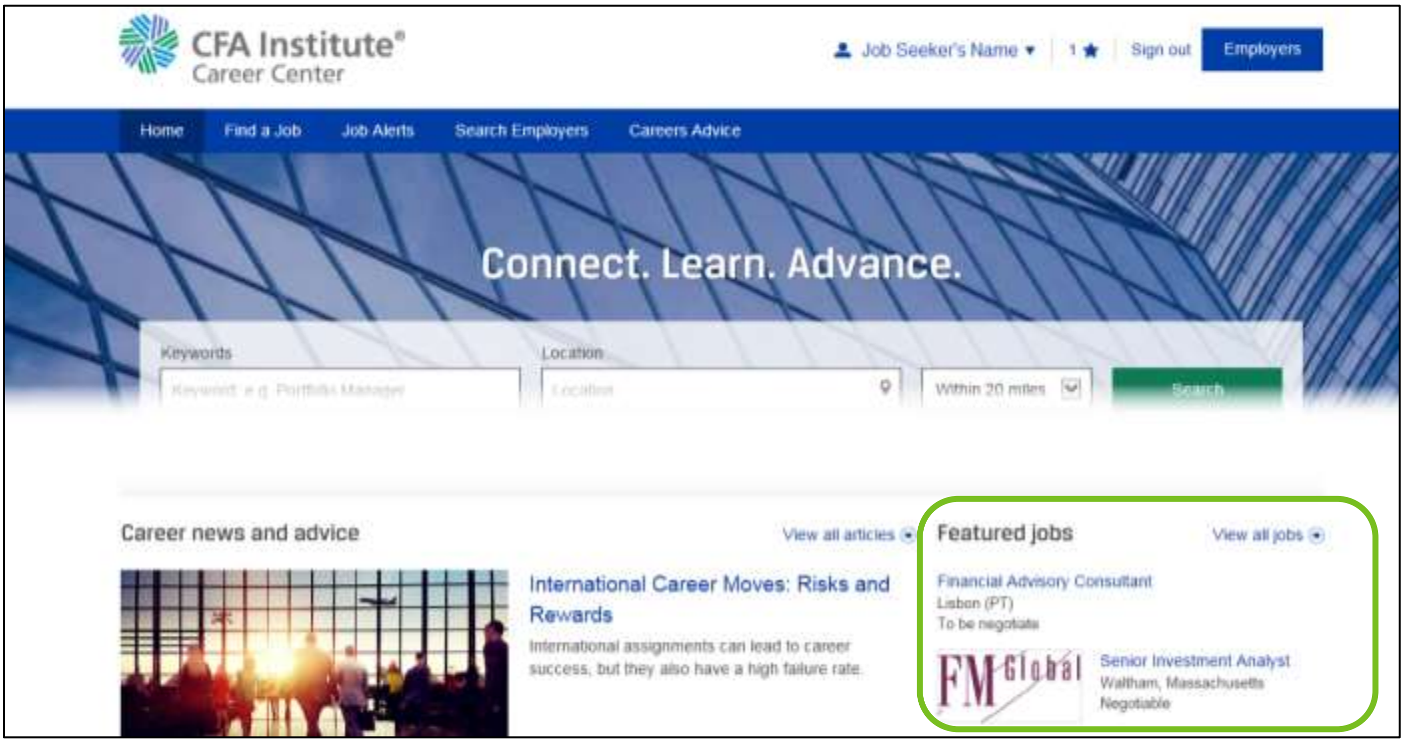
2. **Ad highlighted in search results:** places job posting at the top of search results when job matches a job seeker's search parameters.



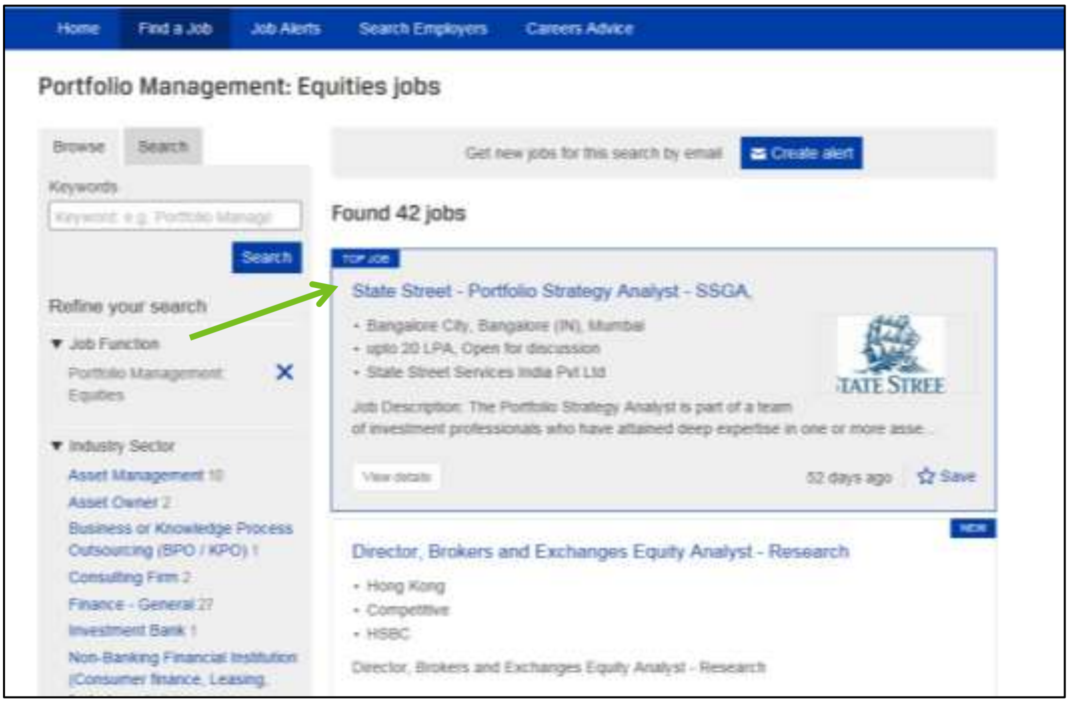
3. **Access to candidates via email:** ability to create email alerts that show candidates who meet alert criteria you define. Please see the Create Saved Searches section of this manual for more information on using this feature.

4. **Access to resume database:** grants access to resume database. Please see the Search for Resumes section of this manual for more information on using this feature.

5. **Ad featured on homepage:** promotes job posting on the Career Center Home page.



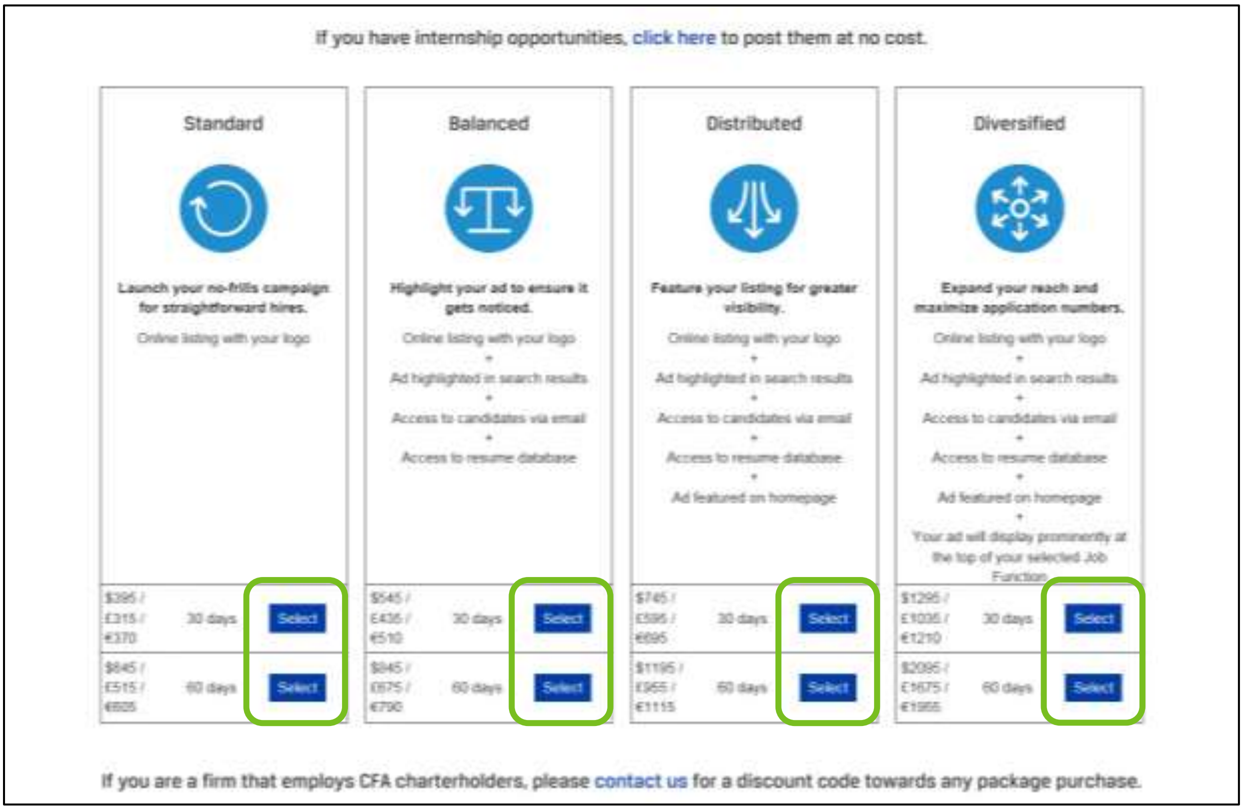
6. **Ad displayed prominently at the top of your selected Job Function:** places job posting at the top of search results when a job seeker browses by the same job function of the job posting.



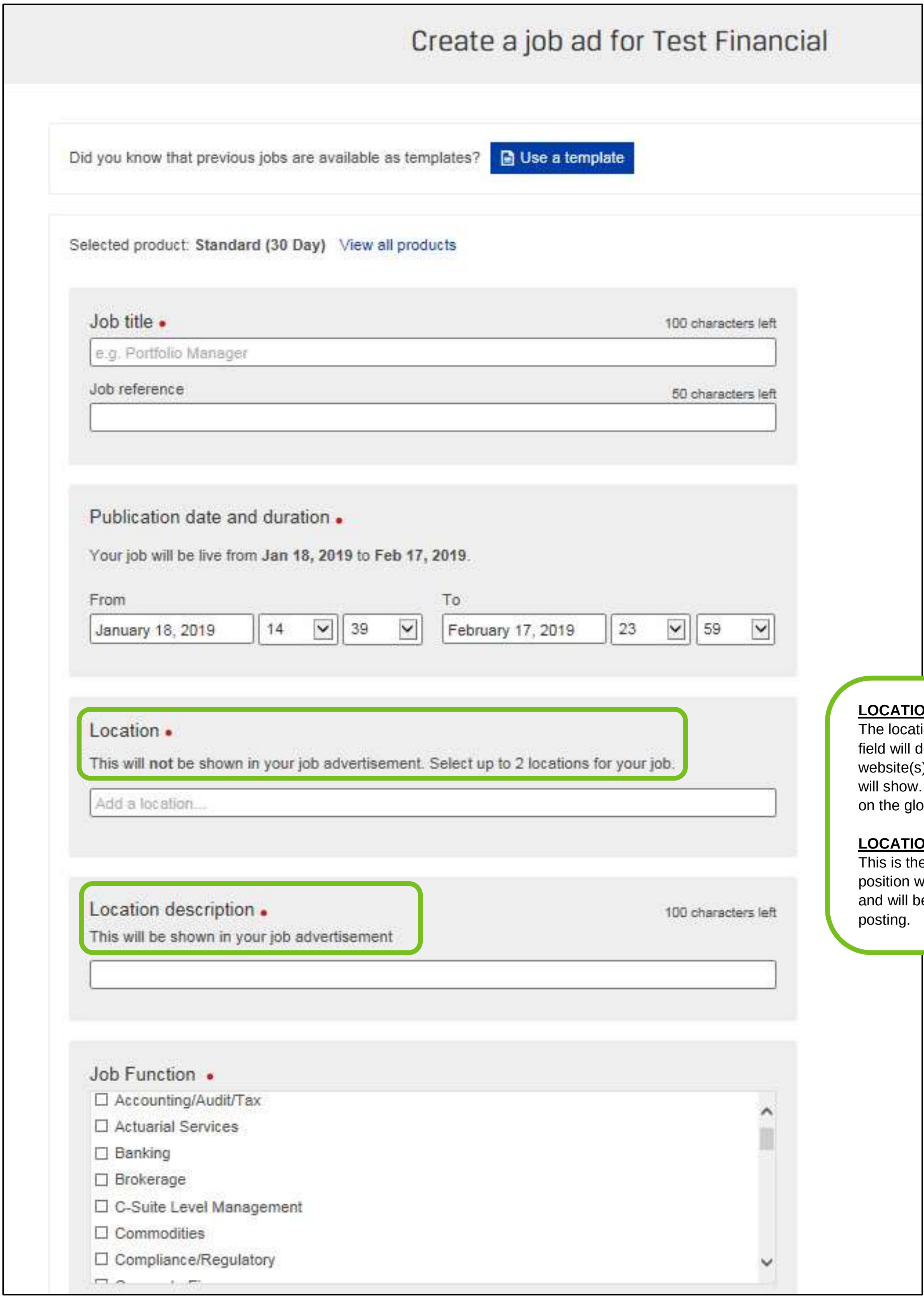
Post a Job

1. From the Career Center Home page, select the region where the position is located. *(<u>Note</u>: You will need to be logged into your company account to post a job.)*

2. **Select** a package that best meets your needs from the options provided.

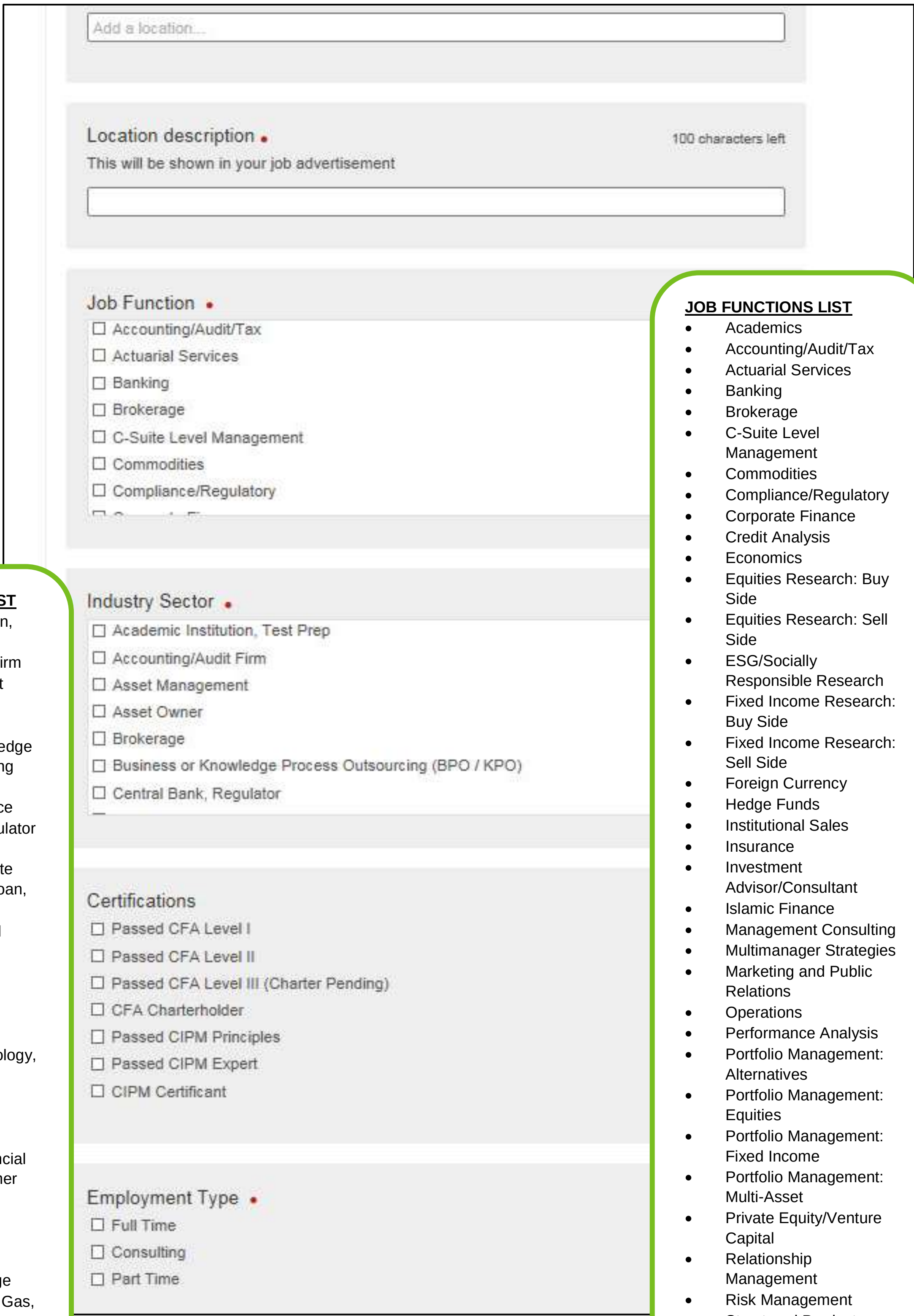


3. Enter details for the position. (*Note: The red dot indicates required fields.* ***Job Function***, ***Industry Sector***, ***Certifications****, and* ***Employment Type*** *fields allow multiple selections.* ***Salary Description*** *is mandatory, but it is also a free text field. For example, you can type in "negotiable", "market", etc.)*



<u>LOCATION</u>
The locations entered in this field will determine the society website(s) where the position will show. All jobs are shown on the global site.

<u>LOCATION DESCRIPTION</u>
This is the location where the position will be headquartered and will be shown in the job posting.



<u>INDUSTRY SECTOR LIST</u>

- Academic Institution, Test Prep
- Accounting/Audit Firm
- Asset Management
- Asset Owner
- Brokerage
- Business or Knowledge Process Outsourcing (BPO/KPO)
- Centre of Excellence
- Central Bank, Regulator
- Commercial Bank, Credit Union, Private Bank, Savings & Loan,
- Consulting Firm
- Construction / Real Estate
- Credit Rating Agency/Bureau
- Government
- Fintech/Insurtech
- Information Technology, Software
- Insurance
- Investment Bank
- Manufacturing
- Non-Banking Financial Institution (Consumer finance, Leasing, factoring, etc.)
- Private Wealth Management Firm
- Securities Exchange
- Utilities (e.g., Oil & Gas, Energy)

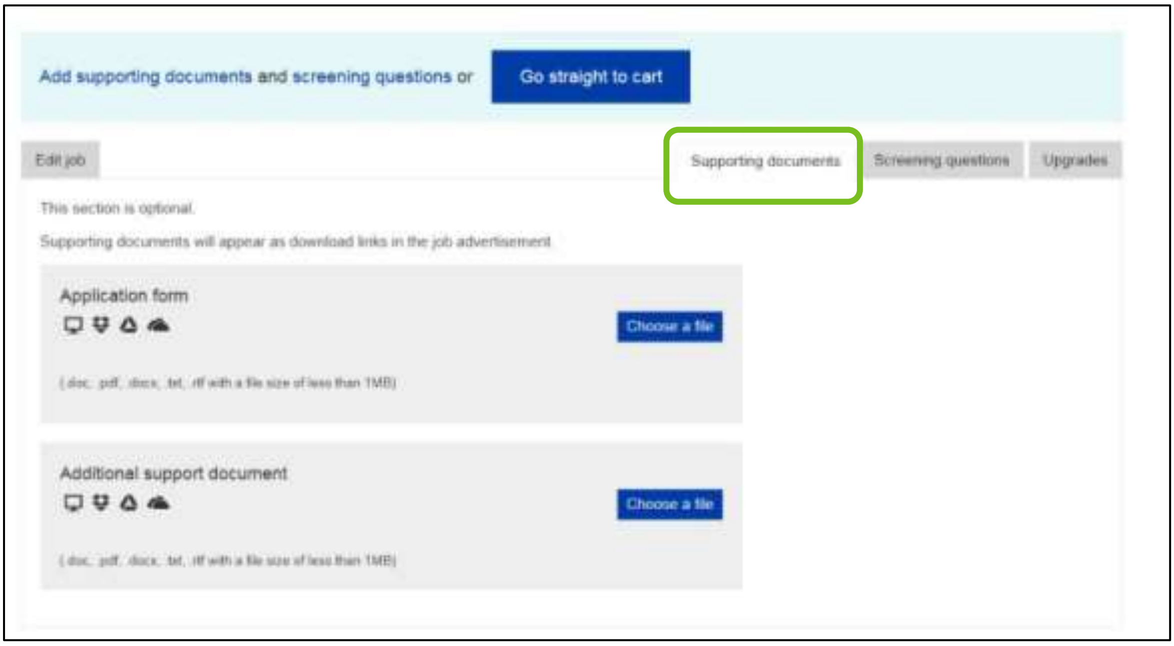
<u>JOB FUNCTIONS LIST</u>

- Academics
- Accounting/Audit/Tax
- Actuarial Services
- Banking
- Brokerage
- C-Suite Level Management
- Commodities
- Compliance/Regulatory
- Corporate Finance
- Credit Analysis
- Economics
- Equities Research: Buy Side
- Equities Research: Sell Side
- ESG/Socially Responsible Research
- Fixed Income Research: Buy Side
- Fixed Income Research: Sell Side
- Foreign Currency
- Hedge Funds
- Institutional Sales
- Insurance
- Investment Advisor/Consultant
- Islamic Finance
- Management Consulting
- Multimanager Strategies
- Marketing and Public Relations
- Operations
- Performance Analysis
- Portfolio Management: Alternatives
- Portfolio Management: Equities
- Portfolio Management: Fixed Income
- Portfolio Management: Multi-Asset
- Private Equity/Venture Capital
- Relationship Management
- Risk Management
- Structured Products
- Trading
- Wealth Management
- Wholesale Sales
- Other

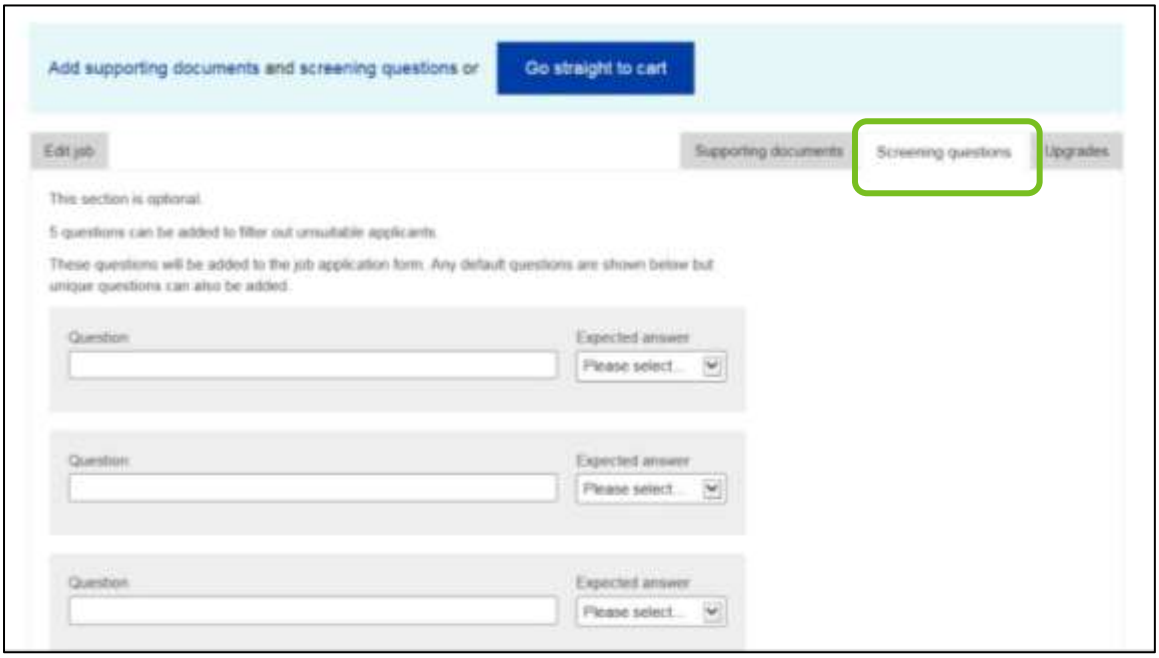
4. Click **Save and continue** when done.

5. On the subsequent screen, you can pay and complete the job posting, **or** you can add additional details for the role. Click the **Go straight to cart** button to pay and post the position to the site. Alternatively, you can add more detail by selecting the **Supporting documents** tab (A) to upload additional documentation for the role, or the **Screening questions** tab (B) to add screening questions. You can also preview the job post by clicking the **Preview this job** button (C).

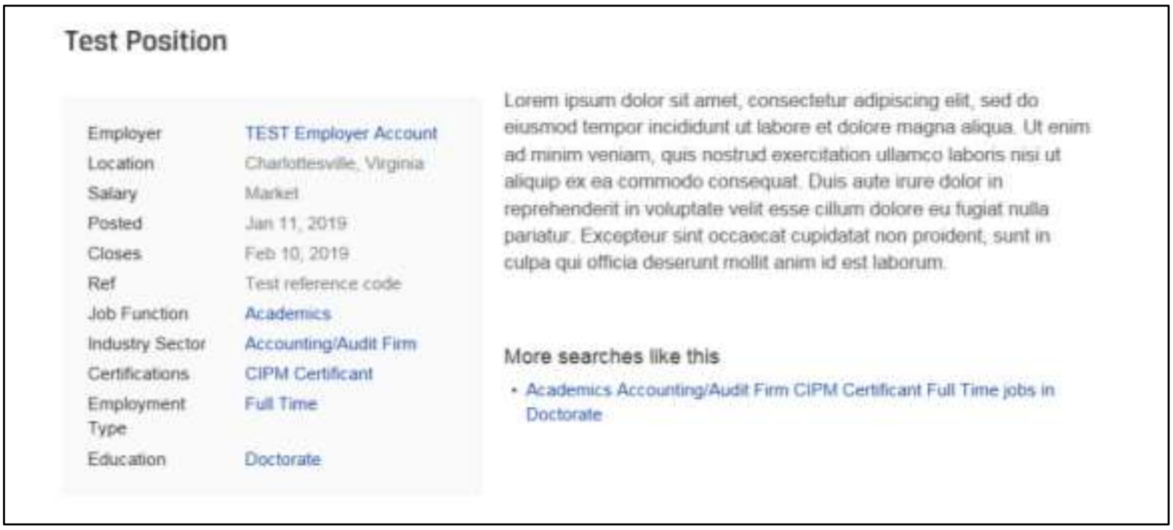
A.



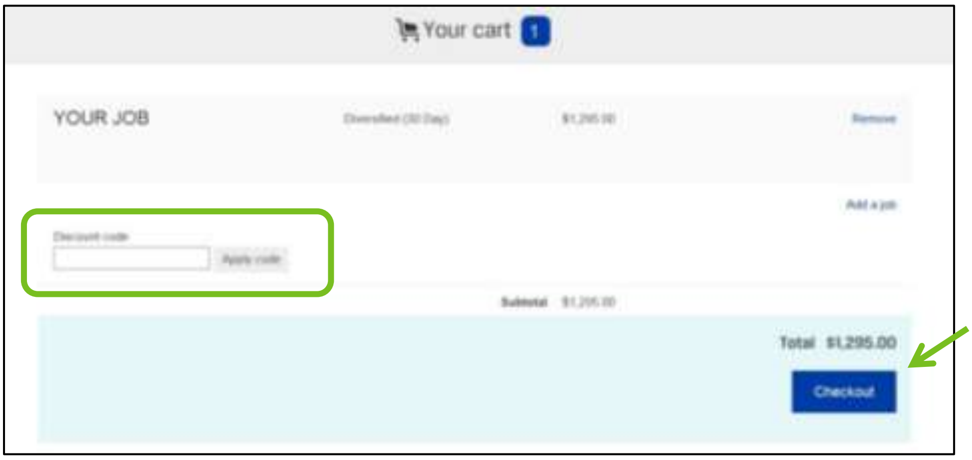
B.



C.



6. In Shopping Cart, enter the relevant discount code, if applicable, in the field shown. Click **Apply code**. When finished, click the **Checkout** button to complete the order and post the job.



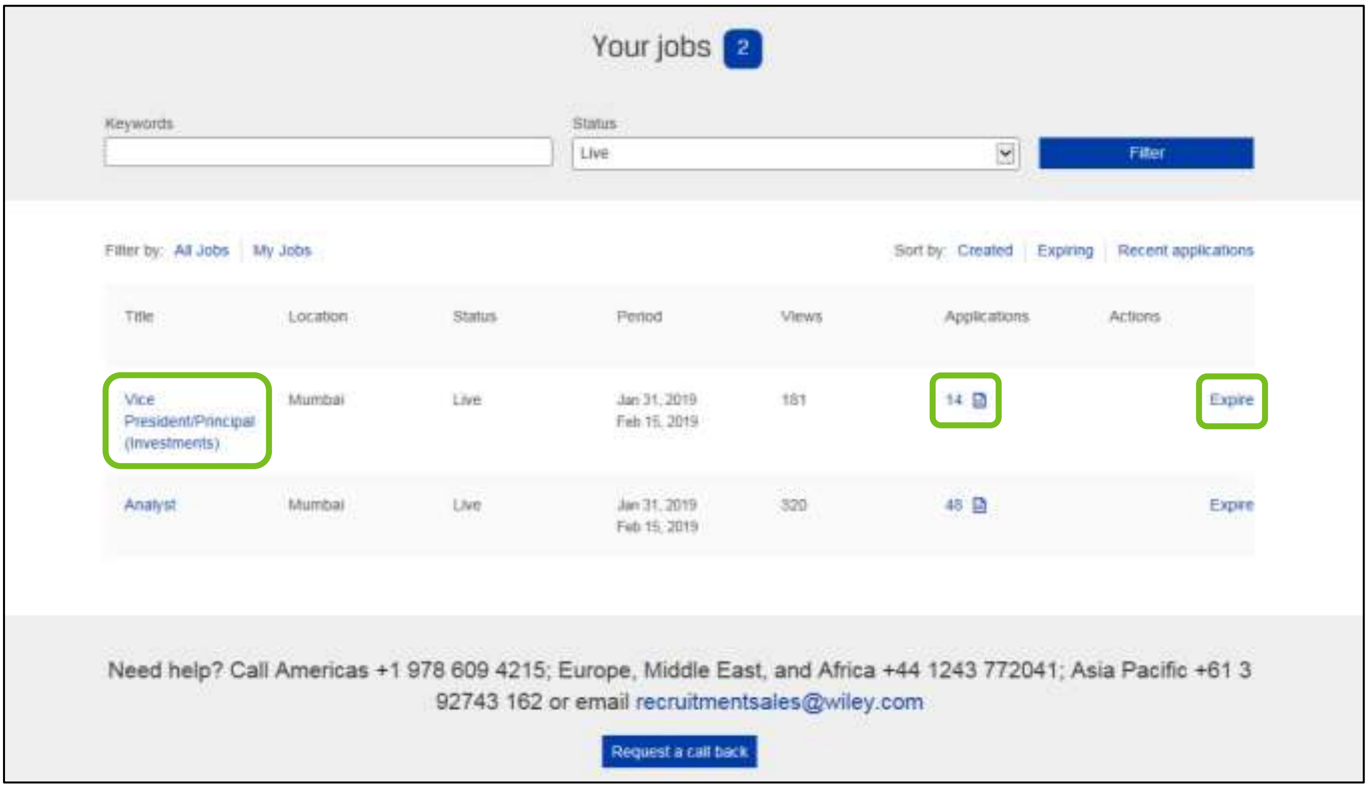
7. You will receive confirmation by email that your order is complete. The job will be live on the Career Center within 15-20 minutes.

IMPORTANT: Job postings cannot be edited once posted. To request an edit to your live job posting, please contact Wiley directly.

Manage Job Postings

1. Posted jobs are manged in the Your Jobs section of the Career Center. Click **Your Jobs** in the top navigation bar.

2. On the Your jobs page, you can view your posting by clicking the job title, view total applications by clicking the number under the Applications column, or expire your post by selecting the **Expire** link.

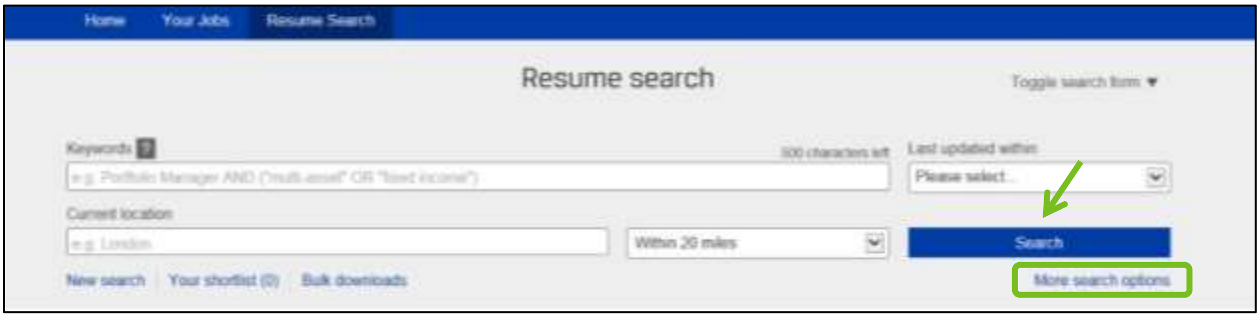


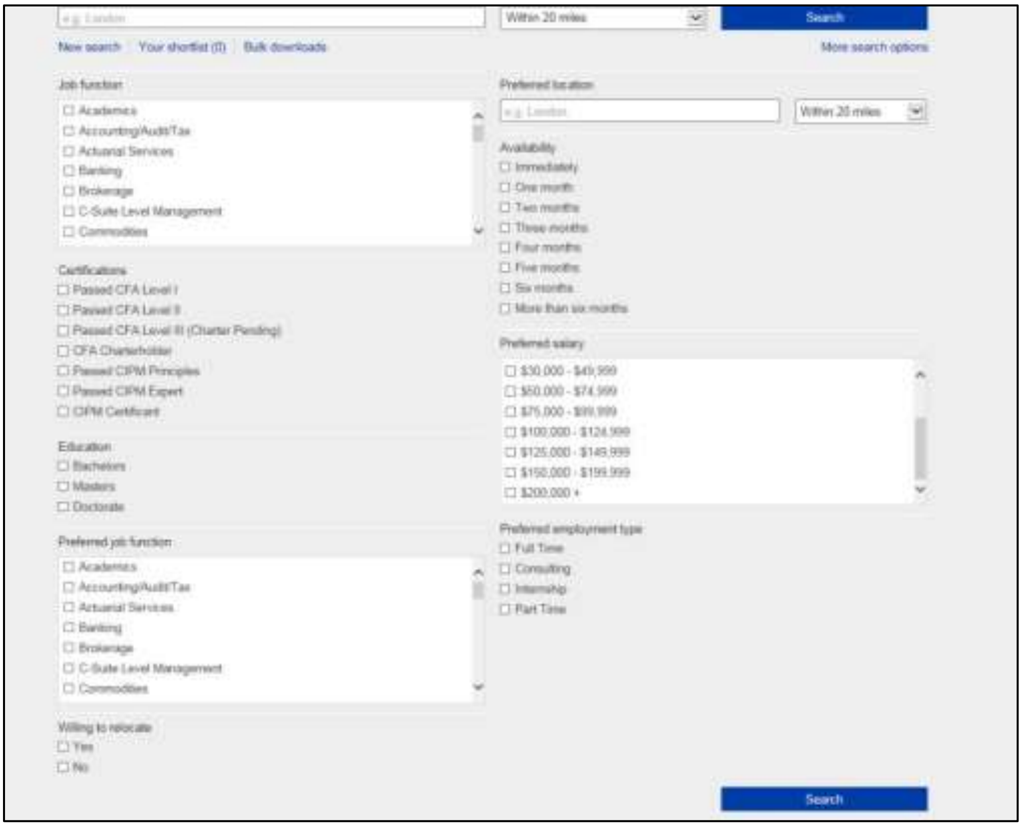
Search Resumes

Complete search functionality is available for users who purchase a Balanced package or higher. Please contact Wiley to turn on your access. If you purchased a Standard package, please contact Wiley to upgrade your access.

1. After logging into your account, click the **Resume Search** link in the top navigation bar on the Home page.

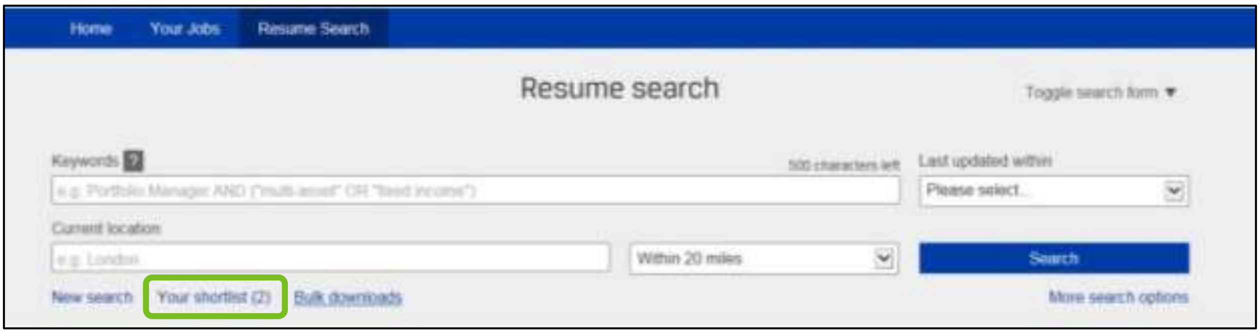
2. Enter search details and click the **Search** button. *(Note: Additional search options are available by clicking the **More search options** link.)*





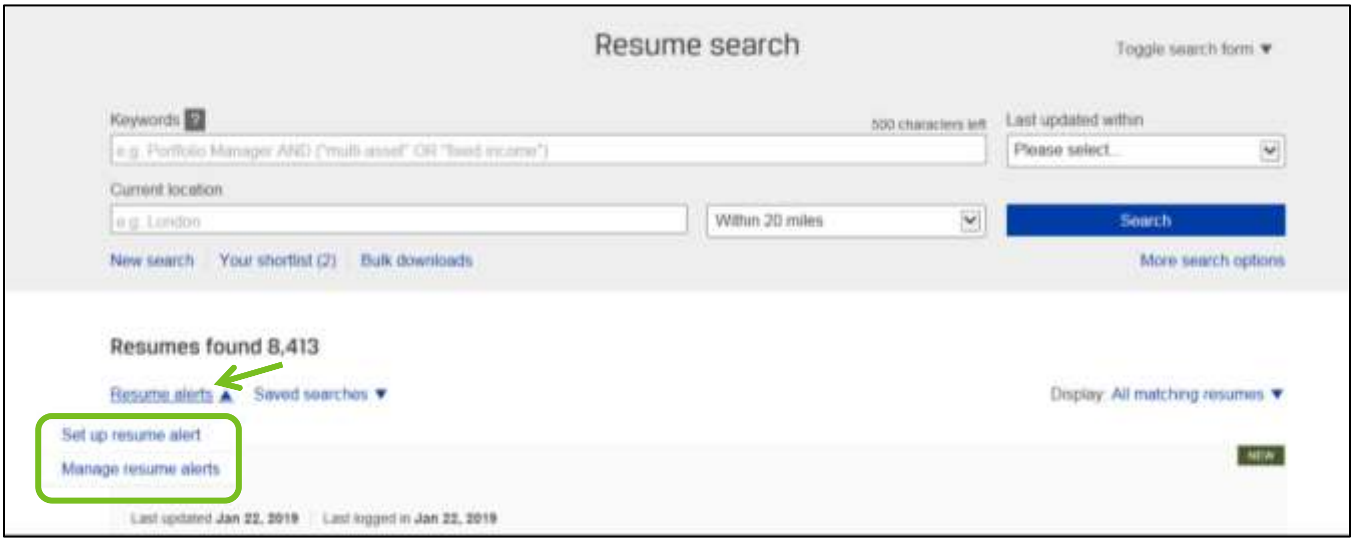
3. Once your list populates, click the candidate's name to see full resume details. You can save a candidate to a shortlist by clicking the star icon. *(<u>Note</u>: The star will turn blue when saved.)* The shortlist can be accessed at any time through the Resume Search page **Your shortlist** link (A).

A.

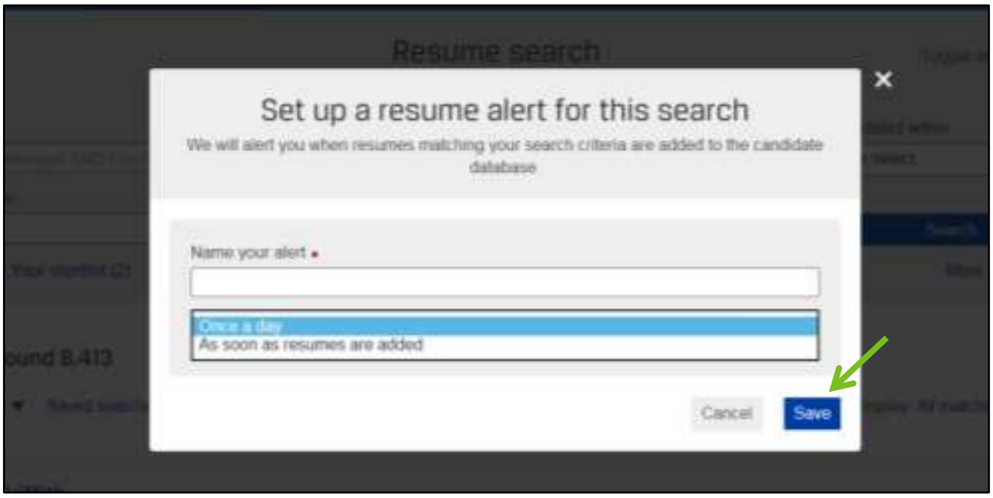


Create Resume Alerts

1. From the Resume Search page, create a resume alert by clicking the **Resume alerts** link then selecting **Set up a resume alert**. (Note: *You can access all setup alerts by clicking the* ***Manage resume alerts*** *dropdown option.)*

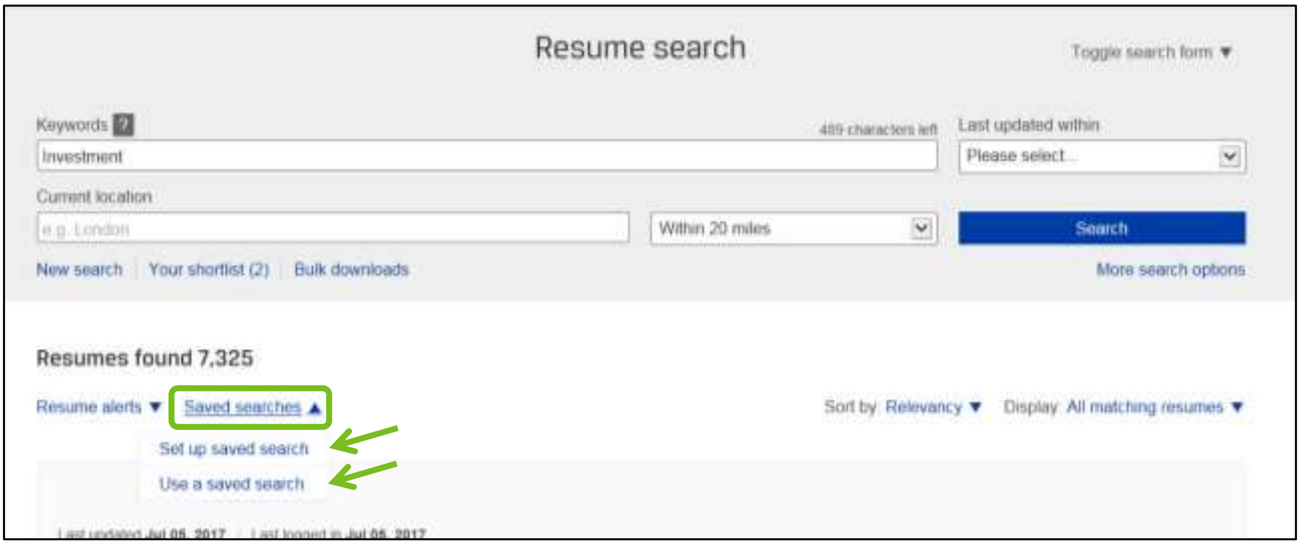


2. Name your alert and select how often you wish to be notified. Click **Save**. (Note: *Alert notifications will be sent via email.)*



Create Saved Searches

1. From the Resume Search page, create a saved search by clicking the **Saved searches** link then selecting **Set up a saved search**. (Note: *You can access all saved searches by clicking the* ***Use a saved search*** *dropdown option.)*



2. Name your search and click the **Save** button. *(Note: **CBE** is candidate bulk email. Checking this box will send search results directly to your email.)*