

User Guide

# Searching for Candidates

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## 1. Searching for Candidates

You can search for candidates that have applied to a vacancy (or registered their interest in working for you) from several locations:

- From the **Dashboard Screen** ('Quick Candidate Search')
- From the **Candidates Select Job** screen
- From the **Candidate Listing**
- From the **Talent Bank**

The most common searches are for candidate names or Application IDs.

However, you can use the candidate search boxes to find candidates based on any word that is included in the online application form e.g. *a town or city, an employer name, a referee name etc.*

## 2. Dashboard Quick Candidate Search

Type your search into the Quick Candidate Search Box on the Dashboard page (e.g. a candidate's first name).

**Figure 1:** Quick Candidate Search

The screenshot shows the reach ATS Dashboard for COBA. The top navigation bar includes Dashboard, Candidates, Vacancies, Libraries, Talent Bank, Reports, Settings, Preferences, and Sign Out. The dashboard content is divided into several sections:

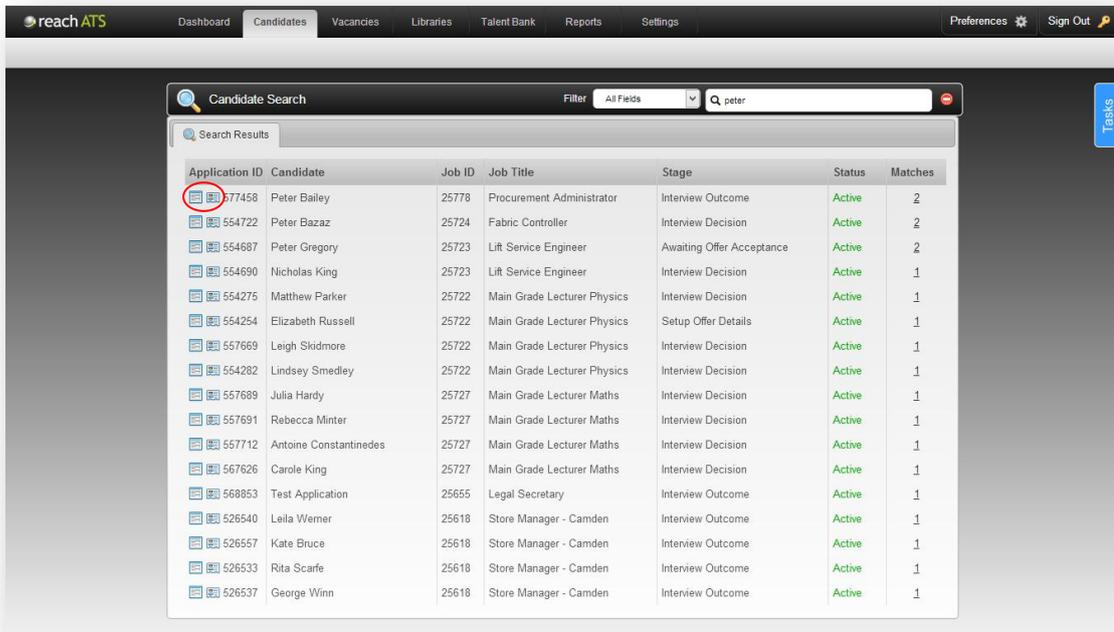
- TOP 10 LIVE VACANCIES:** A horizontal bar chart showing the number of active candidates for various roles. The roles and their candidate counts are: Main Grade Lecturer Maths (25), Main Grade Lecturer Ph... (23), Store Manager - Camden (20), Procurement Administrator (20), Fabric Controller (20), Lift Service Engineer (15), Sales Assistant - Soll... (10), Store Manager - Workin... (10), Customer Care Team Leader (5), and Electrical Engineer (5).
- ACCOUNT SUMMARY:** A summary of key metrics: 396 Total Candidates, 346 Active Candidates, 10 Live Vacancies, and 15 Total Hires.
- QUICK CANDIDATE SEARCH:** A search box containing the text "Peter Bailey". This section is highlighted with a red circle.
- GO TO VACANCY:** A dropdown menu labeled "Select a Vacancy".
- SCHEDULED SCREENING:** A section indicating "There are no upcoming scheduled screenings".
- ACTIVITY FEED:** A list of recent activities, including "Recruiter Amanda Clark Progressed Shaun Reilly from Shortlisted to Schedule Interview" and "Recruiter Amanda Clark Progressed Shaun Reilly from Screening Decision to Shortlisted".

Matching candidates will instantly be displayed in the search results.

### 3. Search Results

Matching candidates are shown in the Search Results screen. Quick links to each candidate's record card and application form are available.

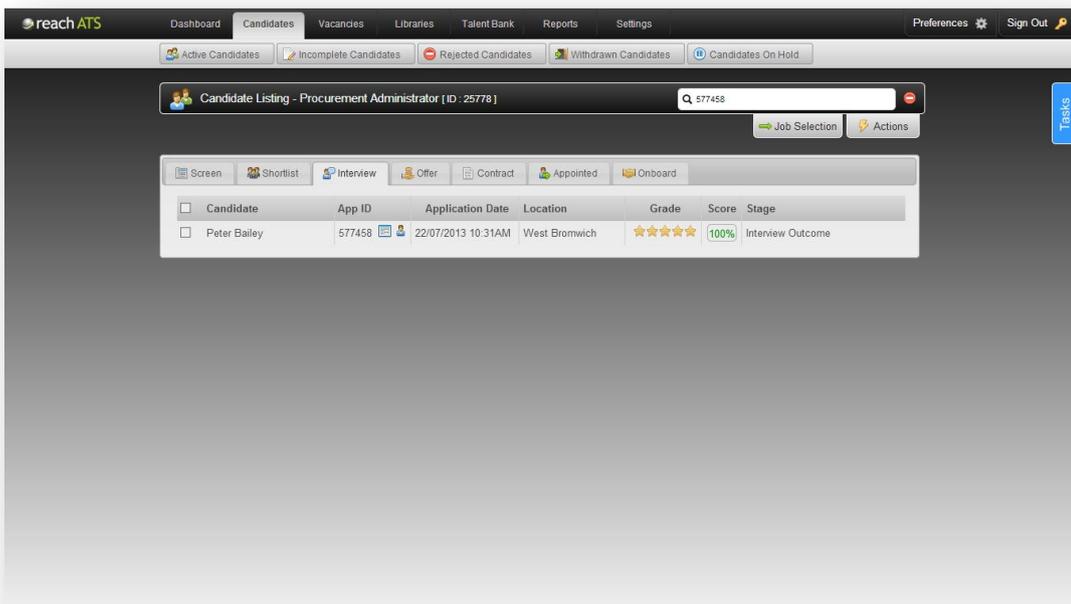
Figure 2: Search Results



Hover over the number of **Matches** to see which fields have matched your search.

Click the candidate's row to display the candidate within the vacancy they applied to.

Figure 3: Click the candidate row to see the candidate within the job



#### 4. Search from Candidates

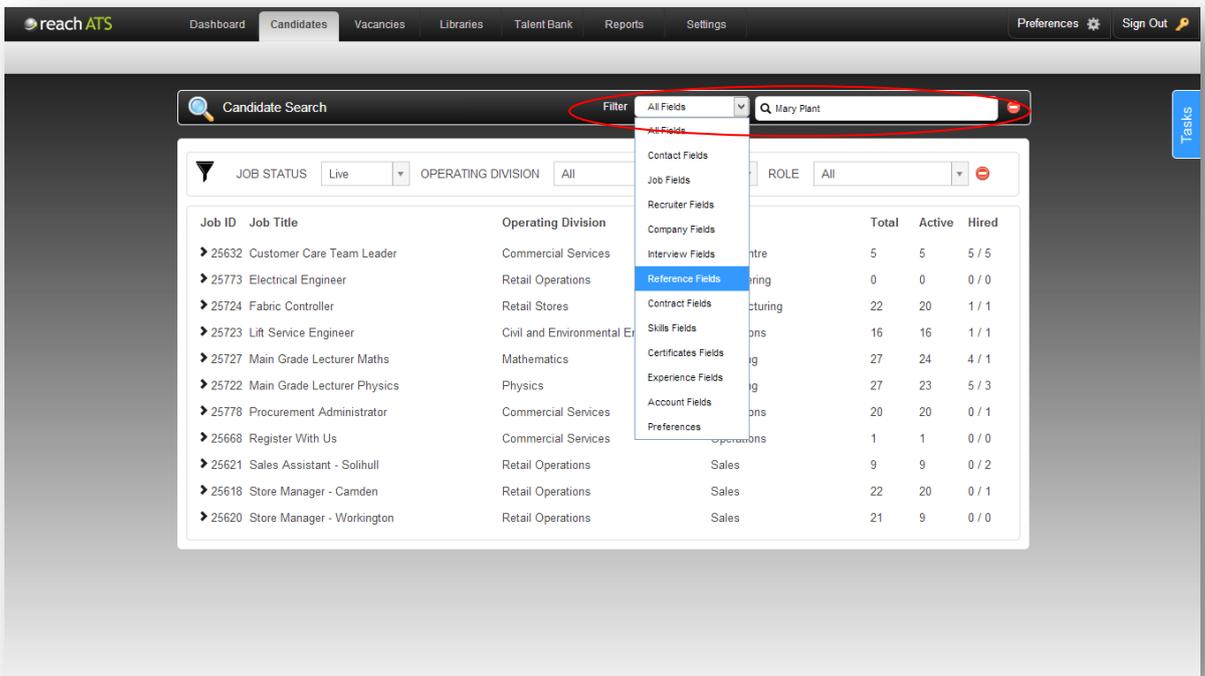
Click **Candidates** and then type your search into the Candidate Search Box at the top of the page.

When you type into the search box, a search filter drop down appears.

This allows you to refine your search to specific types of candidate answers. For example, you can search for a referee name.

Press **Enter** to run your search.

**Figure 4:** Search from Candidates



#### 5. Search within a vacancy

Click **Candidates** and select a job.

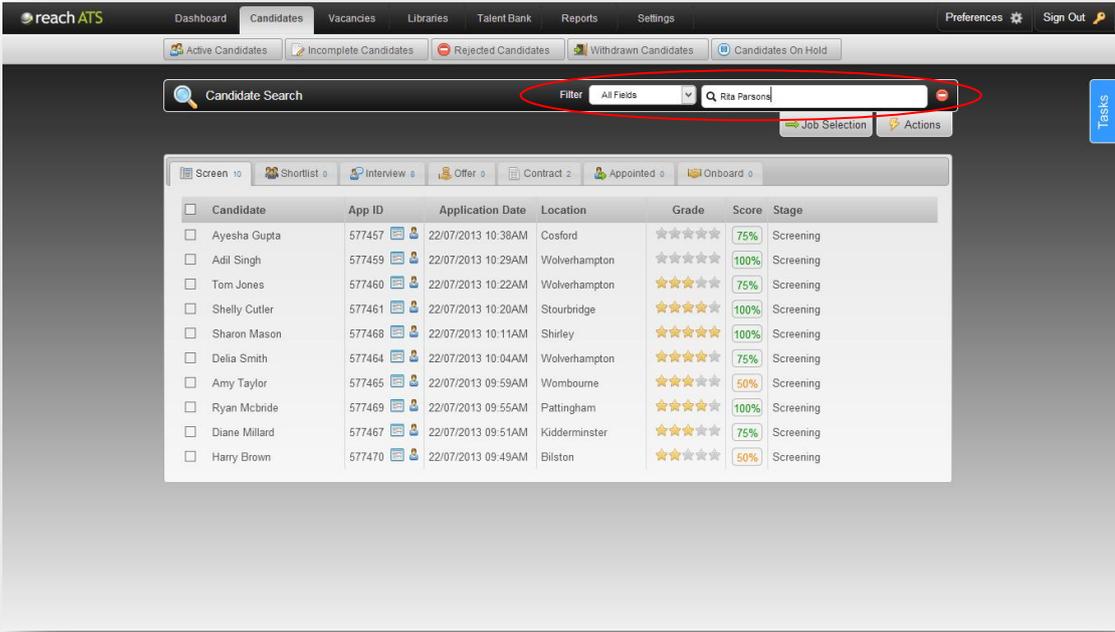
Type your search into the Candidate Search Box at the top of the candidate listing page.

When you type into the search box, a search filter drop down appears.

This allows you to refine your search to specific types of candidate answers. For example, you can search for a referee name.

Press **Enter** to run your search.

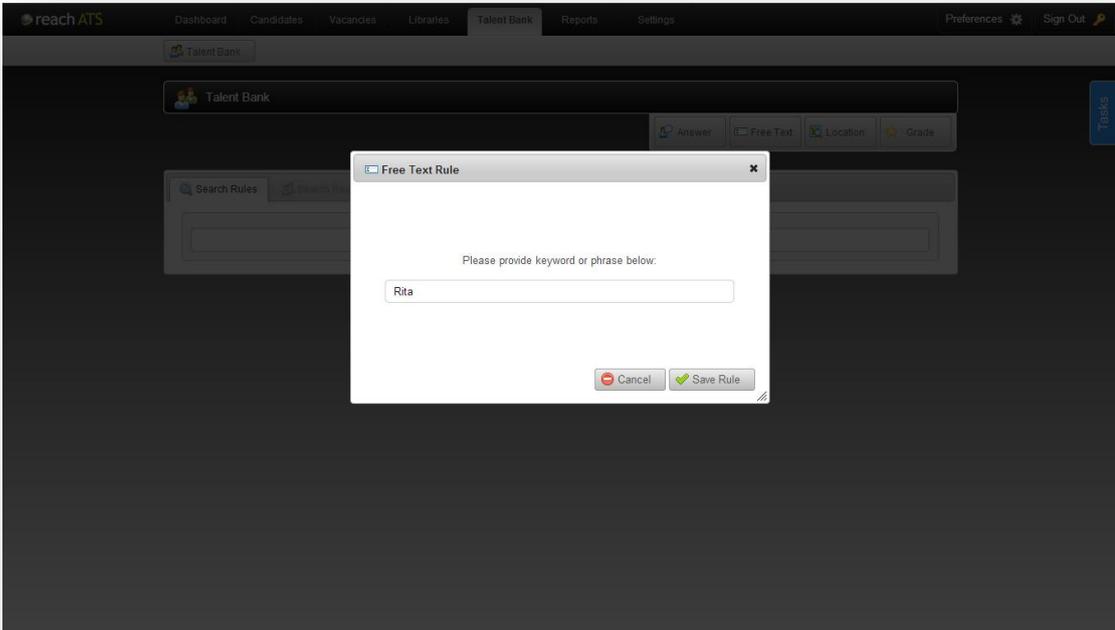
Figure 5: Search within a vacancy



## 6. Search within the Talent Bank

Click Talent Bank > Free Text and then type your search into the box.

Figure 6: Talent Bank free text search



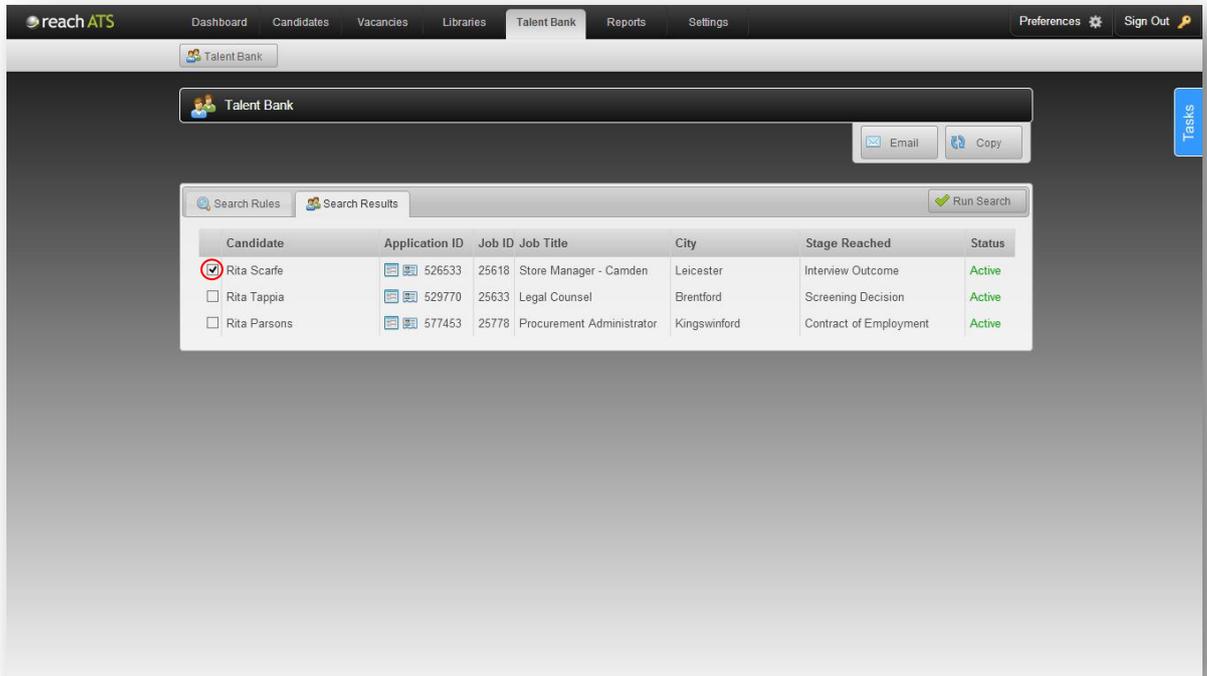
Save the rule and then click Run Search.

Matching candidates will be shown in the search results.

Save the rule and then click **Run Search**.

Matching candidates will be shown in the search results.

**Figure 7:** Talent Bank search results



From the search results screen, use the checkbox to select candidates. You can then:

- Email the candidate(s) using the **Email** action
- Copy the candidate(s) to another vacancy using the **Copy** action