

User Guide

Account Users

Prepared By: Reach Support



CONTENTS

	<i>Page</i>
1. Account users overview	2
2. Account users listing	2
3. Access rights	3
4. Add a new HR user	3
5. Add a new Hiring Manager	4
6. Options bar	4
7. Send a password reset email	5
8. Disable / Remove Account Users	9
9. Email Password	10

1. Account Users Overview

Account users are employees of your organisation that have access to the Reach system.

The Account Users tool allows you to:

- Create new account users
- Determine if the user is a HR Administrator or Hiring Manager
- Set access rights for Account Users
- Disable logins (& re-enable logins)
- Remove users from your account
- Send password reset emails to users

To access the Account Users tools, click **Settings** from the main menu at the top of the page.

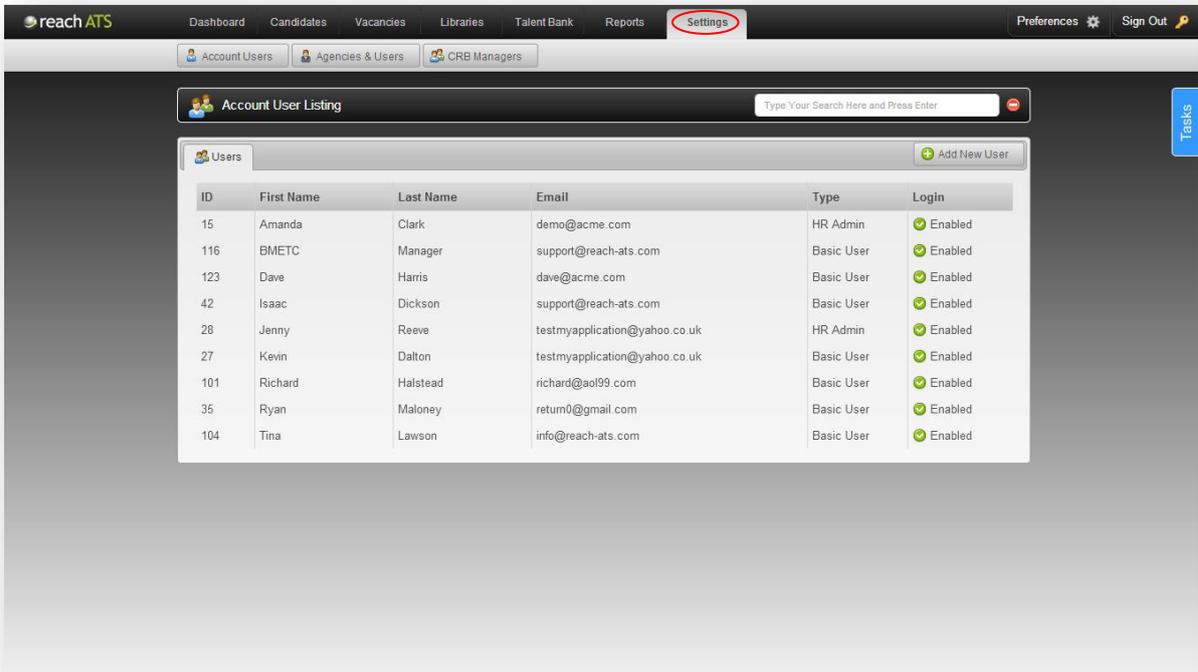
2. Account User Listing

Click the Account Users button, to see the **Account Users Listing**.

Account Users are allocated into two types (HR Administrator & Hiring Manager) and each user's type is clearly shown in the listing.

You can use the **Search** tool in the Account User Listing bar to quickly find any user.

Figure 1: Account Users Screen



The screenshot shows the 'Account User Listing' interface. At the top, the 'Settings' menu item is circled in red. Below the navigation bar, there are tabs for 'Account Users', 'Agencies & Users', and 'CRB Managers'. The main content area features a search bar with the placeholder text 'Type Your Search Here and Press Enter'. Below the search bar is a table of users with the following data:

ID	First Name	Last Name	Email	Type	Login
15	Amanda	Clark	demo@acme.com	HR Admin	Enabled
116	BMETC	Manager	support@reach-ats.com	Basic User	Enabled
123	Dave	Harris	dave@acme.com	Basic User	Enabled
42	Isaac	Dickson	support@reach-ats.com	Basic User	Enabled
28	Jenny	Reeve	testmyapplication@yahoo.co.uk	HR Admin	Enabled
27	Kevin	Dalton	testmyapplication@yahoo.co.uk	Basic User	Enabled
101	Richard	Halstead	richard@aol99.com	Basic User	Enabled
35	Ryan	Maloney	return0@gmail.com	Basic User	Enabled
104	Tina	Lawson	info@reach-ats.com	Basic User	Enabled

3. Access Rights

Access Rights determine the tabs and tools that the user actually sees when they login to the system.

HR Administrators have full access to all areas of the system unless their access rights have been reduced.

To remove modules from a HR Administrator, untick the relevant tab in the Edit User tool. For instance, unticking 'Settings' will remove the Settings tab from the user's screen.

Hiring Managers only see jobs in their Candidates tab have been allocated to them by HR.

In addition, you have the option of letting the manager access the job requisition form. If the manager is responsible for authorising vacancies this option is also available.

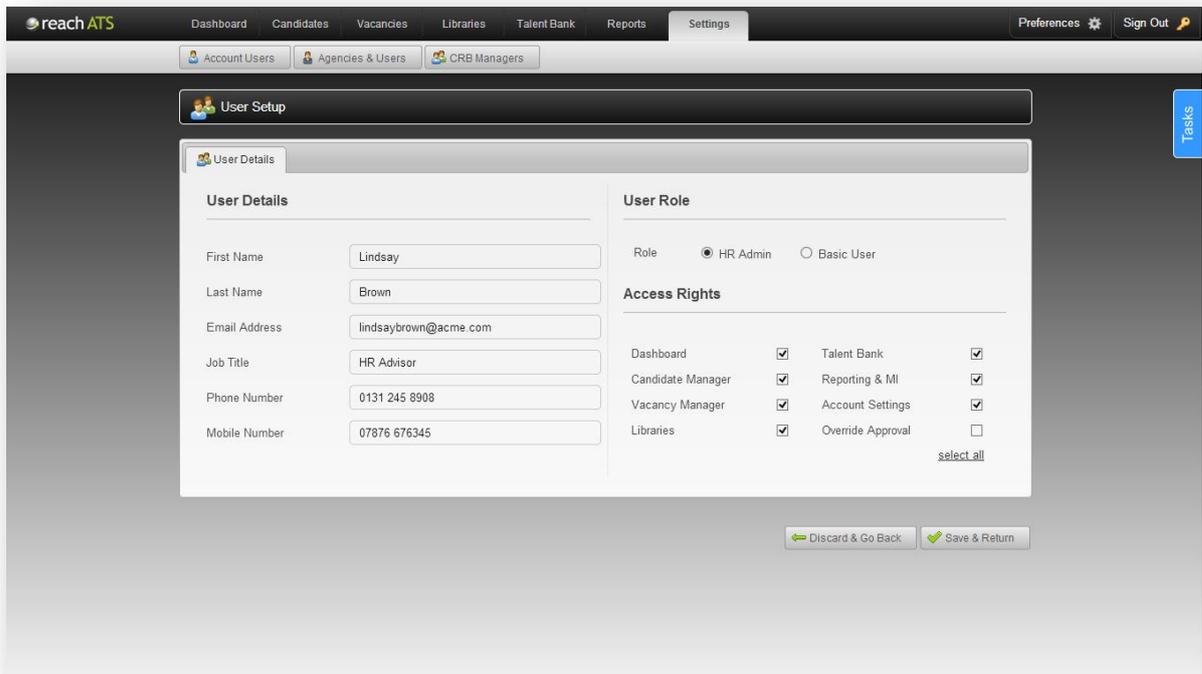
4. Add a new HR user

To create a new **HR User**:

1. Click **Add New User**
2. Fill in the **User Details** text boxes
3. Set the **User Role** to **HR Admin**
4. Tick the modules the new user should have access to (or **Select All**) in **Access Rights**
5. Click **Save & Return**

The user will now be shown in the **Account User Listing**.

Figure 2: Add New HR User



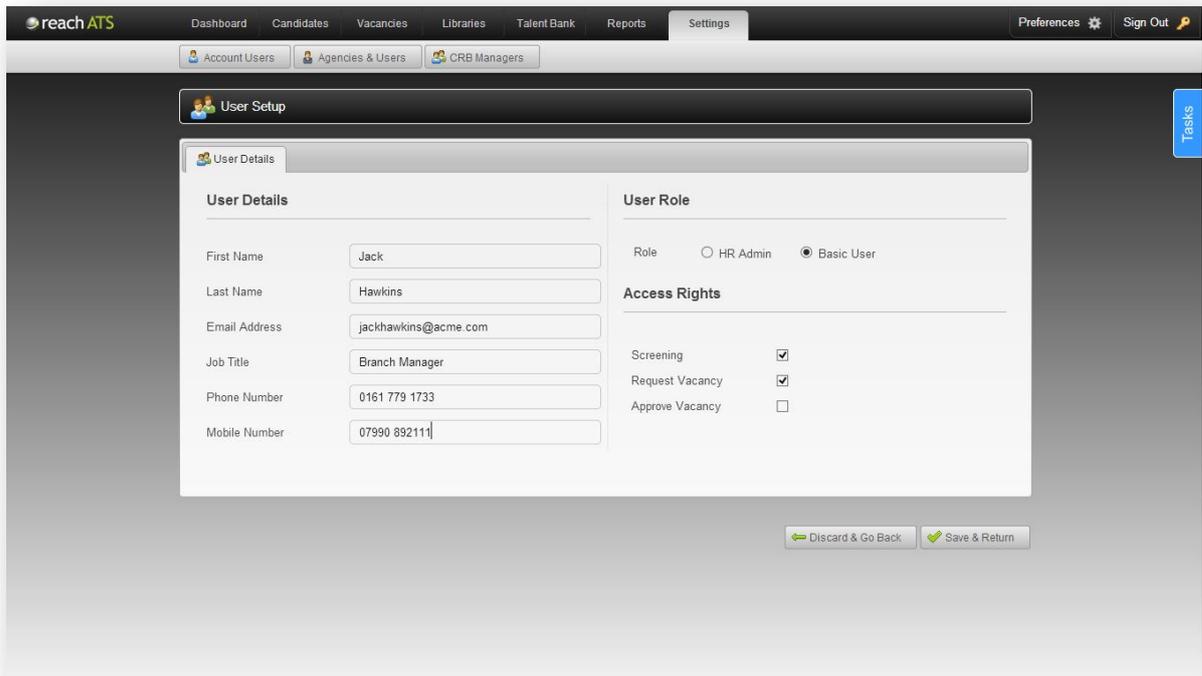
5. Add a new Hiring Manager

To create a new Hiring Manager:

1. Click **Add New User**
2. Fill in the **User Details** text boxes
3. Set the **User Role** to **Hiring Manager**
4. Tick the manager's permissions in **Access Rights** (i.e. Screening, Request Job, Approve Job)
5. Click **Save & Return**

The user will now be shown in the **Account User Listing**.

Figure 3: Add New Hiring Manager User



The screenshot shows the 'User Setup' form in the reach ATS system. The form is divided into two main sections: 'User Details' and 'User Role'. The 'User Details' section contains several text input fields: First Name (Jack), Last Name (Hawkins), Email Address (jackhawkins@acme.com), Job Title (Branch Manager), Phone Number (0161 779 1733), and Mobile Number (07990 892111). The 'User Role' section has a 'Role' field with radio buttons for 'HR Admin' and 'Basic User', where 'Basic User' is selected. Below this is the 'Access Rights' section, which includes three checkboxes: 'Screening' (checked), 'Request Vacancy' (checked), and 'Approve Vacancy' (unchecked). At the bottom of the form, there are two buttons: 'Discard & Go Back' and 'Save & Return'. The top navigation bar includes 'reach ATS' and various menu items like 'Dashboard', 'Candidates', 'Vacancies', 'Libraries', 'Talent Bank', 'Reports', 'Settings', 'Preferences', and 'Sign Out'. A 'Tasks' sidebar is visible on the right.

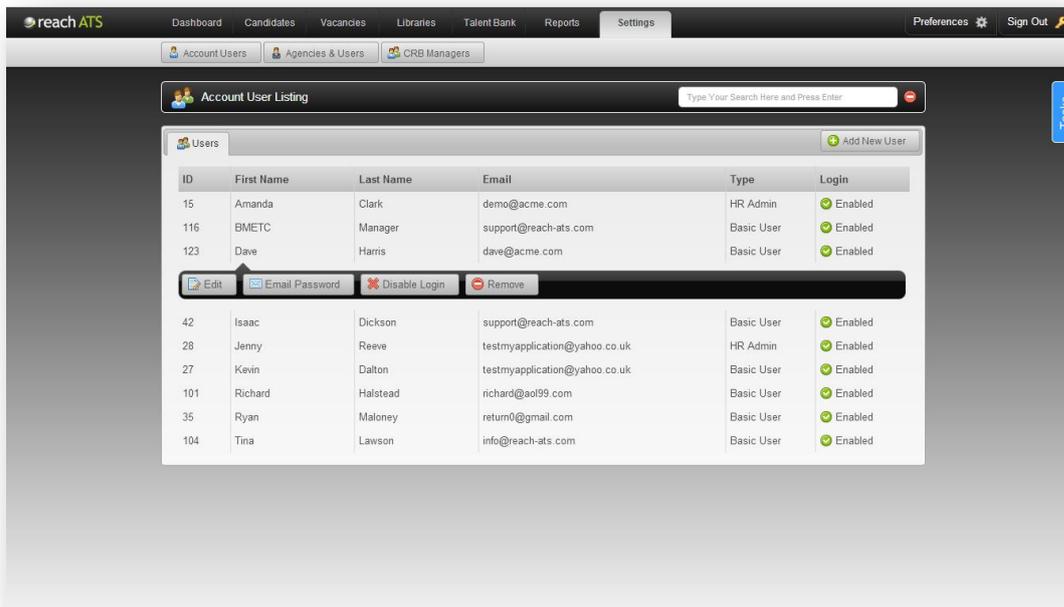
6. Options Bar

Click on a User's name to access the **Options Bar**.

From the options bar you can:

- **Edit** the user
- Send a **Password Reset** email
- **Disable** the user's login
- **Remove** the user from the system

Figure 4: Click user name to access the options bar



9. Send a password reset email

To trigger a Password Reset Email:

1. Click the user name in the Account User Listing
2. From the options bar click **Email Password**

The temporary password will be emailed to the User immediately. The user can change their password as soon as they have logged by using the **Change Password** tool in **Preferences**.

Figure 5: Email Password

