

User Guide

Candidates

Prepared By: Reach Support



CONTENTS

	<i>Page</i>
1. Candidates overview	2
2. Select job	2
3. Candidate listing	3
4. Stage tabs	5
5. Options bar	5
6. Candidate record card	6
7. Progress a candidate to the Next Stage	7
8. Reject a candidate from the recruitment process	8
9. Withdraw a candidate's application	8
10. Mark a candidate 'On Hold'	9
11. Recruiter Forms	9
12. Access Batch Actions	11
13. Search for Candidates	11

1. Candidates Overview

The **Candidates** module allows HR users to manage candidates for vacancies across the organisation in terms of:

- Viewing every individual candidate application for every vacancy
- Progressing candidates through the recruitment process
- Rejecting candidates from the recruitment process
- Accessing detailed candidate information in their Record Card
- Scheduling interviews and other activities
- Reviewing references
- Entering offer and contract details
- Uploading candidate files (e.g. Proof of Identity)
- Emailing candidates individually or in batches
- Searching for specific candidates

2. Select Job

When the Candidates tab is clicked, the list of live vacancies is loaded. To update the vacancy list you can filter the list by job status, operating division or job role.

Click the black arrow icon next to a job to view additional details about the job.

Figure 1: Select Job

The screenshot shows the 'Candidate Listing - Select Job' interface. At the top, there is a navigation bar with 'reach ATS' and various menu items: Dashboard, Candidates, Vacancies, Libraries, Talent Bank, Reports, Settings, Preferences, and Sign Out. Below the navigation bar, there is a search bar labeled 'Candidate Search: Enter app ID or name'. The main content area features a table with columns: Job ID, Job Title, Operating Division, Role, Total, Active, and Hired. The table lists several jobs, including 'Customer Care Team Leader', 'Electrical Engineer', 'Fabric Controller', 'Lift Service Engineer', 'Main Grade Lecturer Maths', 'Main Grade Lecturer Physics', and 'Procurement Administrator'. Below the table, there are details for the selected job: Salary (£16,560 to £22,770 per annum), Closing Date (25/12/2013), Hiring Managers (Kevin Dalton, Richard Halstead), and Location (Solihull). The HR Administrator is listed as Amanda Clark. At the bottom of the table, there are more job listings: 'Register With Us', 'Sales Assistant - Solihull', 'Store Manager - Camden', and 'Store Manager - Workington'.

Job ID	Job Title	Operating Division	Role	Total	Active	Hired
▶ 25632	Customer Care Team Leader	Commercial Services	Call Centre	5	5	5 / 5
▶ 25773	Electrical Engineer	Retail Operations	Engineering	0	0	0 / 0
▶ 25724	Fabric Controller	Retail Stores	Manufacturing	22	20	1 / 1
▶ 25723	Lift Service Engineer	Civil and Environmental Engineering	Operations	16	16	1 / 1
▶ 25727	Main Grade Lecturer Maths	Mathematics	Lecturing	27	24	4 / 1
▶ 25722	Main Grade Lecturer Physics	Physics	Lecturing	27	23	5 / 3
▶ 25778	Procurement Administrator	Commercial Services	Operations	20	20	0 / 1

Salary: £16,560 to £22,770 per annum
Closing Date: 25/12/2013
Hiring Managers: Kevin Dalton, Richard Halstead
Location: Solihull
HR Administrator: Amanda Clark

▶ 25668	Register With Us	Commercial Services	Operations	1	1	0 / 0
▶ 25621	Sales Assistant - Solihull	Retail Operations	Sales	9	9	0 / 2
▶ 25618	Store Manager - Camden	Retail Operations	Sales	22	20	0 / 1
▶ 25620	Store Manager - Workington	Retail Operations	Sales	21	9	0 / 0

To load the candidate listing for a job, click anywhere on the job's row.

3. Candidate Listing

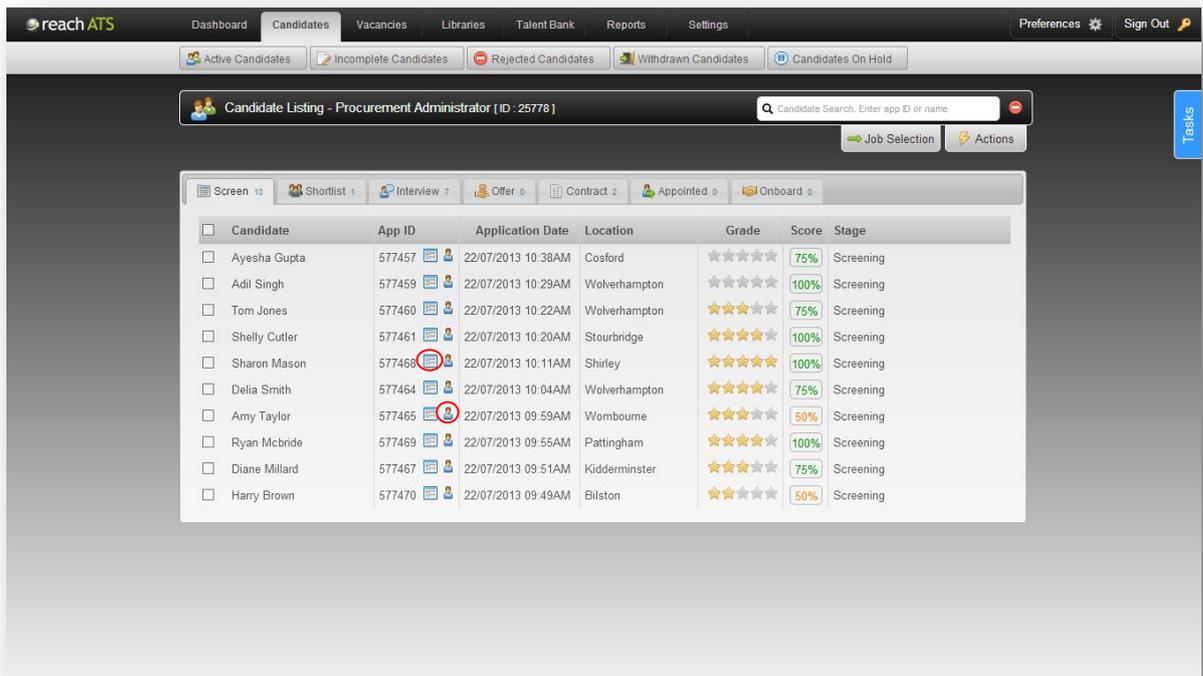
Candidates are organised into tabbed stage groups and are listed in the order that they entered the stage, with newest candidates at the top of the list.

The candidate listing headings are:

- Candidate Name
- Application ID
- Application Date
- Location (Town / City)
- Grade (optional 1-5 star rating input by recruiter)
- Score (against any rating questions used in the application form)
- Current Stage

The listing updates in real time so you may see the tab counts increase or decrease as candidate apply and colleagues move candidates through the process.

Figure 2: Candidate Listing



To view the candidate’s **complete application form**, click the form icon (next to the Application ID - see figure 2).

The form will open in a new tab for your review (see figure 3).

Figure 3: Candidate Application Form

Form Viewer Print

Sharon Mason

Application for Procurement Administrator
Applicant : 577468

PERSONAL DETAILS

Title	Mrs.
First Name	Sharon
Surname	Mason
Email Address	smas0@yahoo123.com
Address	Flat 4, The Greenway
Town / City	Shirley
Country	West Midlands
Country	United Kingdom
Postcode	B90 3AU
Home Telephone	0121 444 5555
Mobile Number	07876 111111
National Insurance Number	NS123456A
Do you have the right to work in the UK?	Yes

ABOUT YOU

When would you be able to start in this role?	Within 1 Month
Do you have the ability to work from home using your own broadband connection?	Yes
Do you have the ability to travel to various locations using your own or public transport?	Yes
Do you have the flexibility to work evenings and / or weekends if required to as part of the job?	Yes
What is your current notice period? (if applicable)	None

EMPLOYMENT HISTORY

To check the recruitment process for the job at any time, click the applicant icon (next to the form icon in the Application ID column - see figure 2).

The recruitment process workflow will open in a new tab for your review (see figure 4).

Figure 4: Checking the recruitment process for the job

Workflow Overview

Housing Officers

This workflow is used to process candidates for Housing Officers e.g. Neighbourhood Housing Officer



STAGE NAME	DESCRIPTION
<p>SCREENING</p> <p>↓</p>	<p>Hiring Manager reviews the candidate's Application Form (and CV if supplied) and grades the candidate as 'YES', 'NO' or 'MAYBE'. When each allocated Hiring Manager has screened the candidate, this action marks the stage as complete and moves the candidate to the next stage – Screening Decision</p> <p>Stage Emails</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> On rejection send "Failed Screening" <input checked="" type="checkbox"/> On entry send "Application Form Received" <p>Additional Forms</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Manager completes Your Screening Decision
<p>SCREENING DECISION</p> <p>↓</p>	<p>HR reviews the Hiring Manager's screening feedback in the 'SCREENING' tab of the Candidate Record Card. Based on the feedback the recruiter rejects the candidate or marks the candidate as successful. This action marks the stage as complete and moves the candidate to the next stage – Shortlisted.</p> <p>Stage Emails</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> On rejection send "Failed Screening" <p>Additional Forms</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Referee 1 completes Referee 1 Request (Optional)

4. Stage Tabs

For your convenience, candidates are grouped in the listing based on the stage of the recruitment process that they have reached.

For example, the stage group tabs may include:

- Screening
- Shortlist
- Interview
- Offer
- Contract
- Checks
- Onboard

Each tab shows a count of how many candidates are currently at stages associated with that Group e.g. **Contract 34**

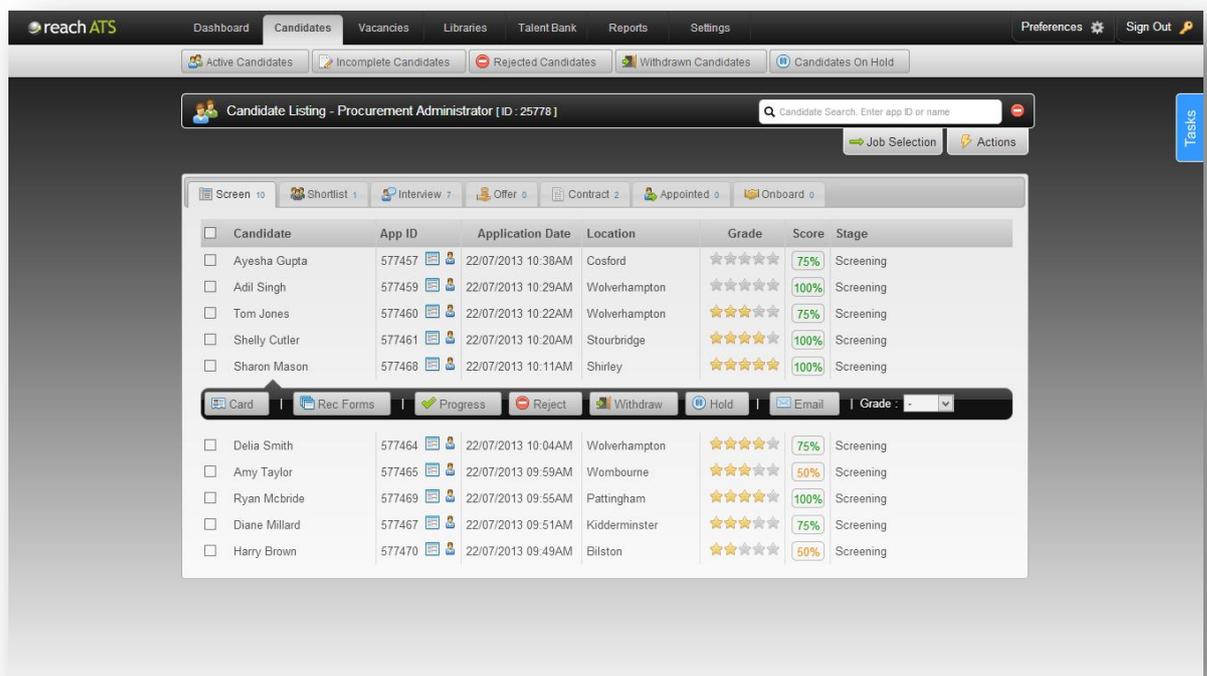
Within each tab there will be individual stages and the candidate’s current stage will be show in the Stage column.

5. Options Bar

A range of tools are available for each candidate by accessing the options bar.

To load the options bar, click anywhere on the candidate’s row.

Figure 5: Options Bar



6. Candidate Record Card

The Candidate Record Card for each candidate can be accessed at any time.

The Record Card allows the recruiter to:

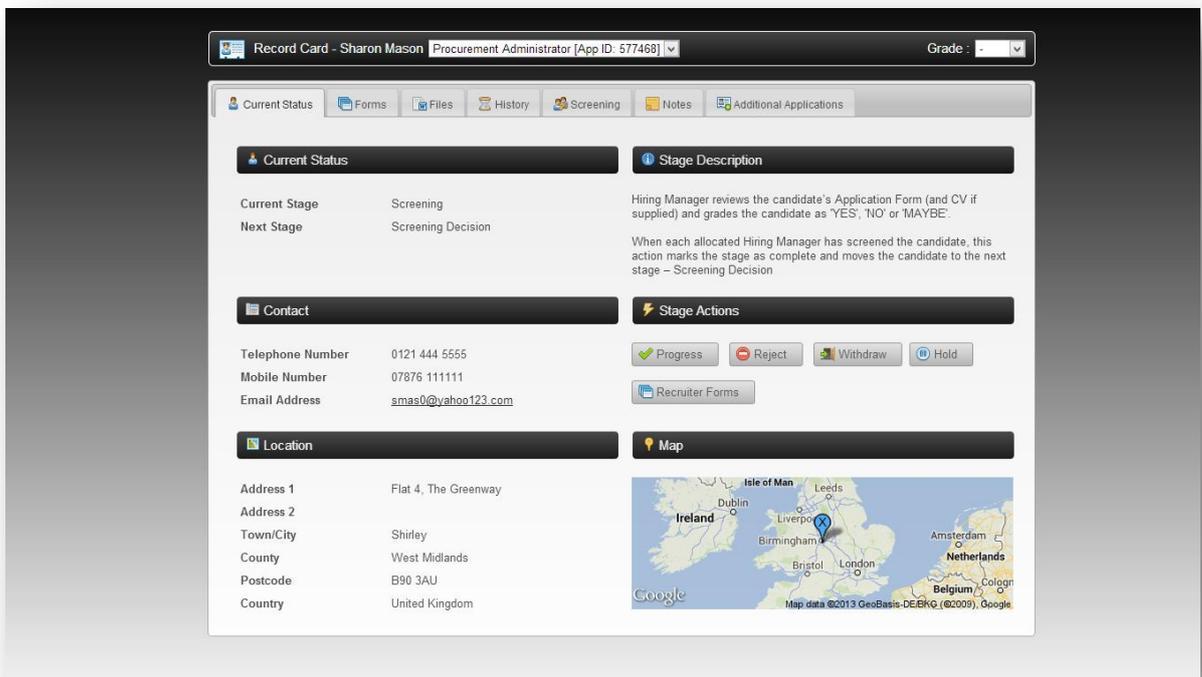
- Instantly view the candidate's current status and contact details
- View the completed online application form
- View additional forms including references
- Access candidate files (e.g. CV) and upload files related to the candidate
- View additional forms (inc referees)
- View the audit trail of the application's history
- View & add application notes
- View any additional applications for other vacancies made by the candidate
- Progress a candidate to the next stage of the recruitment process
- Reject a candidate from the recruitment process

To access the Record Card:

1. Click anywhere on the candidate's row to access the options bar
2. Click Card

The Record Card will open in a new tab.

Figure 6: Candidate Record Card



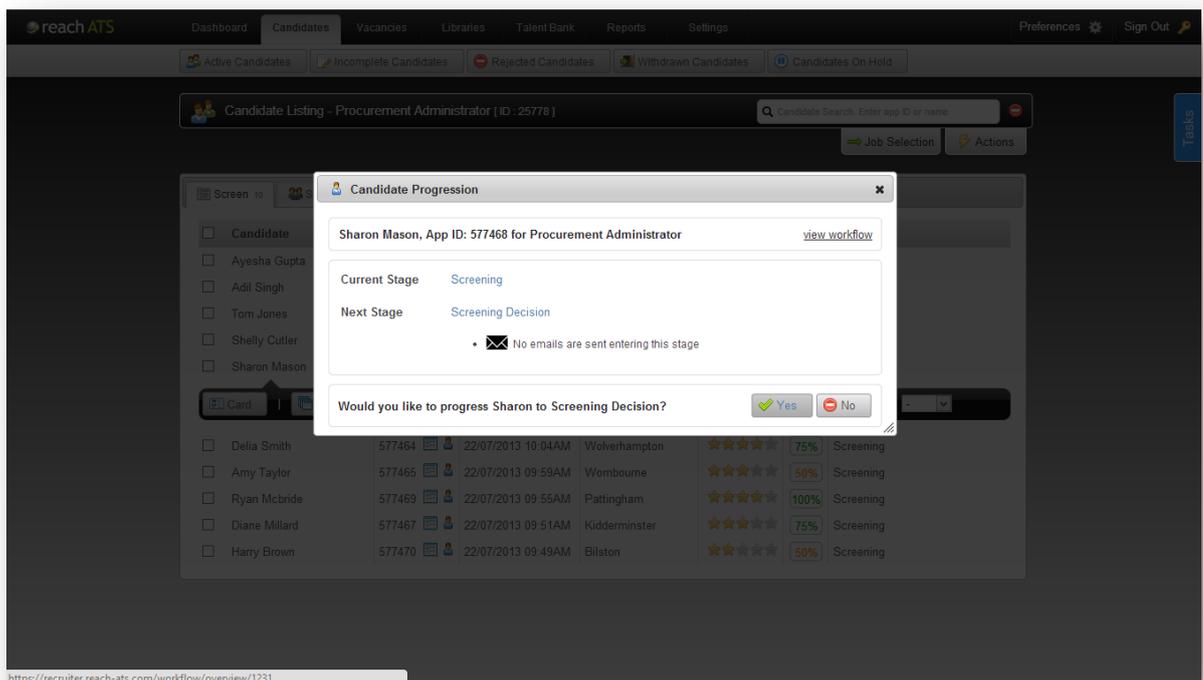
7. Progress a candidate to the next stage

Candidates are moved through the recruitment process by progressing (or rejecting) their application at each **Recruiter Stage**.

To progress a candidate to the next stage:

1. Click the candidate's row to access the options bar
2. Click **Progress** from the available options
3. Click **Yes** to confirm

Figure 7: Progress a candidate's application



An information panel confirms the candidate's current stage and the stage that you will progress them onto. A link to view the workflow is displayed for your convenience.

The panel also shows any automated emails that have been scheduled to send when the candidate reaches the next stage.

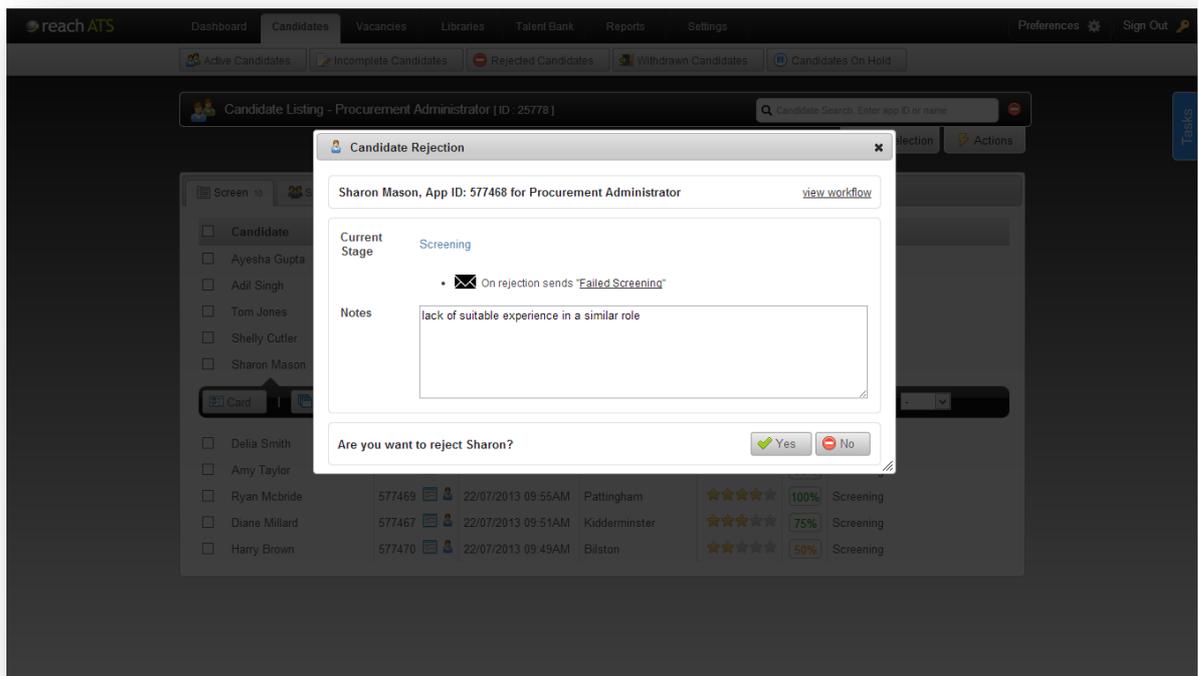
N.B. Please note that you can also progress a candidate from within the Record Card.

8. Reject a candidate from the recruitment process

To reject a candidate from the recruitment process:

1. Click the candidate's row to access the options bar
2. Click **Reject** from the available options
3. Click **Yes** to confirm

Figure 8: Reject a candidate's application



An information panel allows you to enter notes regarding the reason for the candidate's rejection, for future reference.

In addition the panel shows if an automated rejection email will be sent.

Rejected candidates will move out of the active candidate list and can be reviewed at any time by clicking **Rejected Candidates** in the sub-menu.

From this rejected candidates listing you can access the candidate's record card and use the **Reinstate** button to move the candidate back to the active listing.

N.B. Please note that you can also reject a candidate from within the record card.

9. Withdraw a candidate's application

If a candidate has withdrawn from the recruitment process you can use **Withdrawn** in the options bar. Follow the same process as for progressing or rejecting a candidate.

An automated courtesy acknowledgement will be emailed to the candidate if the email template has been included in the workflow.

Withdrawn candidates will move out of the active candidate list and can be reviewed at any time by clicking **Withdrawn Candidates** in the sub-menu.

From this withdrawn candidates listing you can access the candidate's record card and use the **Reinstate** button to move the candidate back to the active listing.

N.B. Please note that you can also withdraw a candidate from within the record card.

10. Mark a candidate 'On Hold'

If you temporarily need to place a candidate on hold, you can use **On Hold** in the options bar. Follow the same process as for progressing or rejecting a candidate.

On Hold candidates will move out of the active candidate list and can be reviewed at any time by clicking **Candidates On Hold** in the sub-menu.

From this on hold candidates listing you can access the candidate's record card and use the **Reinstate** button to move the candidate back to the active listing.

N.B. Please note that you can also mark a candidate as on hold from within the card.

11. Recruiter Forms

Recruiter Forms allow recruiters to input specific details relating to the candidate's application e.g. schedule interview, job offer details etc.

This data can then be used to provide merge information for use in:

- Candidate Emails
- Merge Documents (e.g. Contracts of Employment)
- Reports

Recruiter Forms may be automatically presented for completion based on the workflow stage, or they can be completed ad-hoc at any time.

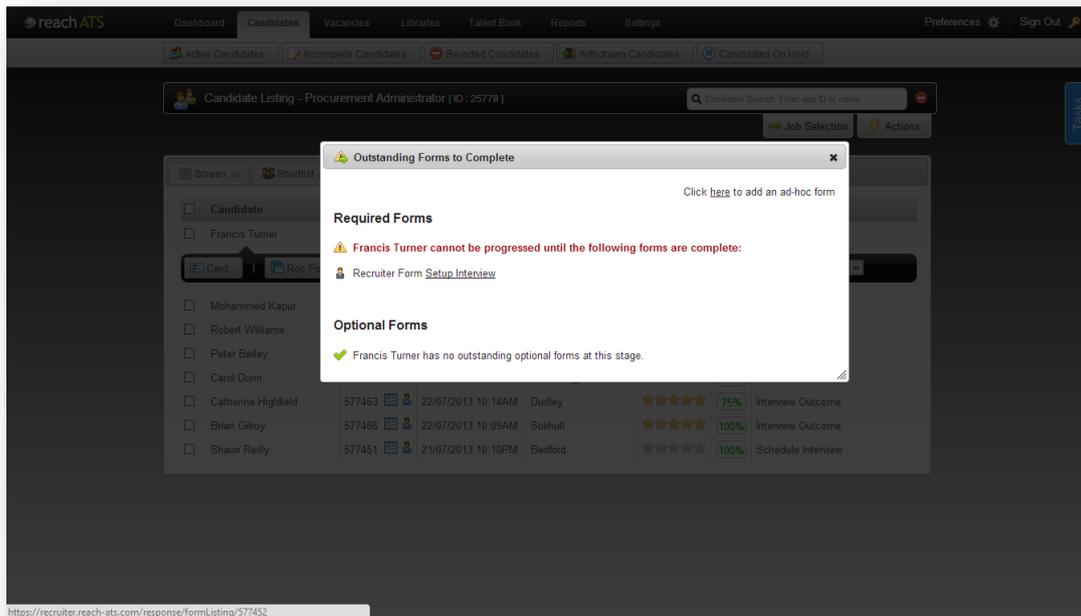
To complete a flow based recruiter form:

1. Click anywhere on the candidate's details within the listing to access the options bar
2. Click **Rec Forms** from the available options
3. Click the form link in the information panel that opens
4. The relevant form will open in a new tab ready for you to complete

When you have completed the form, you can progress the candidate as normal.

The completed form will be listed in the **Forms** tab of the Record Card.

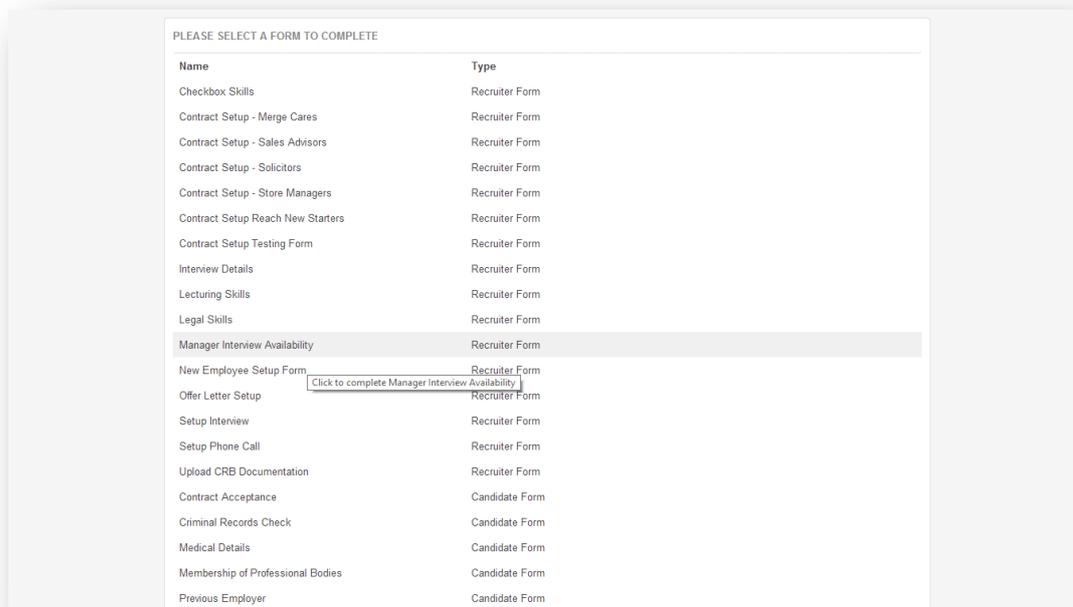
Figure 9: Complete a flow based recruiter form



To complete an ad-hoc recruiter form:

1. Click anywhere on the candidate’s details within the listing to access the options bar
2. Click **Rec Forms** from the available options
3. Click the link to complete an ad hoc form in the information panel that opens
4. Click the relevant form in the tab that opens and fill in the details

Figure 9: Ad hoc recruiter forms



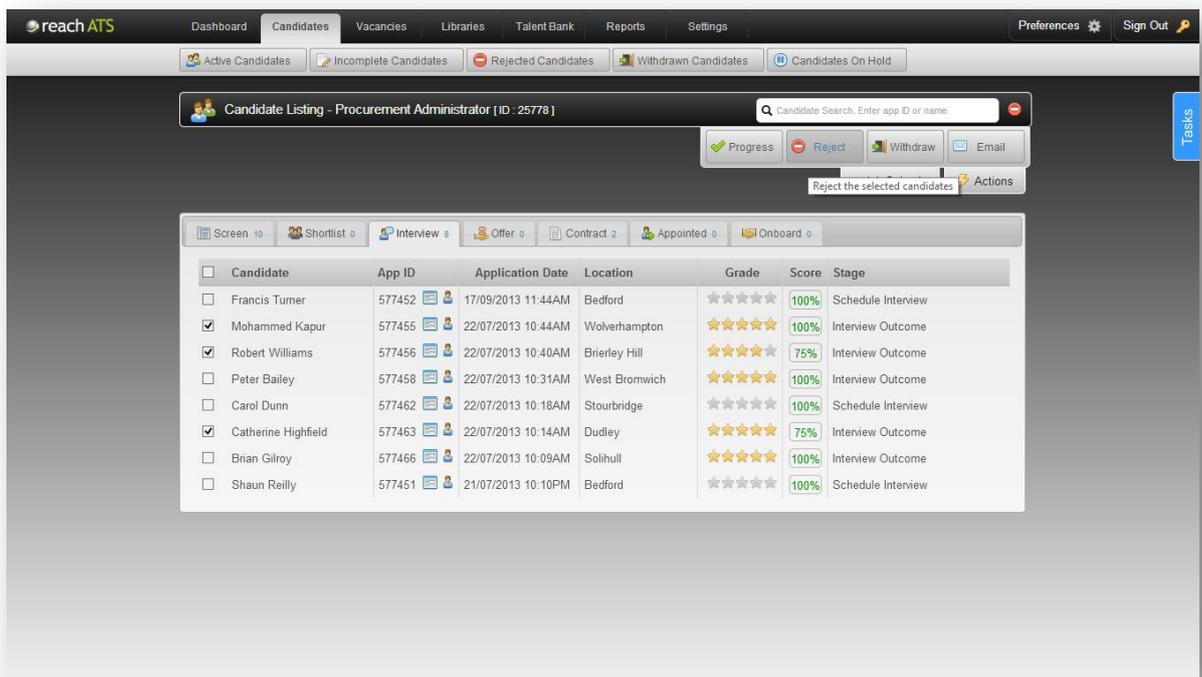
The completed form will be listed in the **Forms** tab of the Record Card.

12. Access Batch Actions

Batch Actions allow you to perform the same action for multiple candidates at the same time:

- **Progress** multiple candidates to the next stage of the recruitment process
- **Reject** multiple candidates from the recruitment process
- **Email** multiple candidates at the same time
- **Withdraw** multiple candidates from the recruitment process

Figure 10: Click Actions to access the batch actions tools



To run a batch action:

1. In the candidate listing, tick the checkbox next to each candidate to action
2. Click the **Actions** tab
3. Select the preferred tool (e.g. Reject)

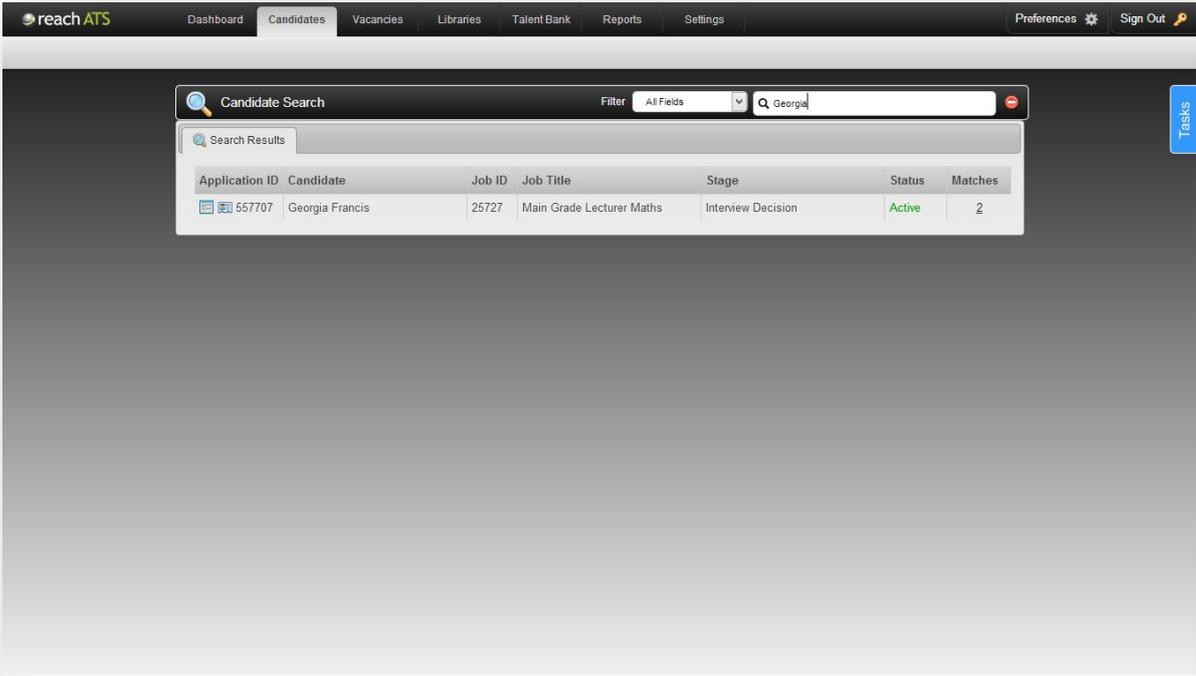
13. Search for Candidates

To search for a candidate, enter the candidate's name or App ID in the search box.

You can also use the search box to find any detail that the candidate has filled in their application form.

Examples include: towns or cities, previous employers, reference names etc.

Figure 10: Candidate search



Matching candidates will be displayed in the search results and quick links to the card and application form are available.

Click the candidate to access full details.