

Quick Start User Guide

Upload Candidate Files

Prepared By: Reach Support



1. About Candidate Files

Every file relating to the candidates application can be viewed from the Candidate Record Card.

The files may have been added by the candidate themselves during the initial application process (e.g. CV or Cover Letter) or later in the process (e.g. Proof of Identity, Exam Certificates, Driving Licence etc.).

The files may also have been added by the HR recruiter during the recruitment process (e.g. P45, P46 etc.).

The system may also add files automatically if the candidate's workflow includes merge documents (e.g. Offer Letter, Employment Contract etc.).

Files can be added to a candidate's application at any time by the **Candidate** themselves (e.g. CV, Photo etc) or by a **Recruiter** (e.g. Scanned copy of passport, Qualification Certificates etc).

2. Open the Candidate Record Card

To access the Record Card:

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

Figure 1: Open the options bar to access the Card button

The screenshot shows the reach ATS interface. At the top, there are navigation tabs: Dashboard, Candidates, Vacancies, Libraries, Talent Bank, Reports, Settings, Preferences, and Sign Out. Below these are filters for Active Candidates, Incomplete Candidates, Rejected Candidates, Withdrawn Candidates, and Candidates On Hold. The main area is titled 'Candidate Listing - Procurement Administrator [ID: 25778]' and includes a search bar and buttons for Job Selection and Actions. A table displays candidate information with columns for Candidate, App ID, Application Date, Location, Grade, Score, and Stage. An options bar is visible below the table, containing buttons for Card, Rec Forms, Progress, Reject, Withdraw, Hold, and Email. The 'Card' button is highlighted with a mouse cursor.

Candidate	App ID	Application Date	Location	Grade	Score	Stage
<input type="checkbox"/> Ayesha Gupta	577457	22/07/2013 10:38AM	Cosford	★★★★★	75%	Screening
<input type="checkbox"/> Adil Singh	577459	22/07/2013 10:29AM	Wolverhampton	★★★★★	100%	Screening
<input type="checkbox"/> Tom Jones	577460	22/07/2013 10:22AM	Wolverhampton	★★★★★	75%	Screening
<input type="checkbox"/> Shelly Cutler	577461	22/07/2013 10:20AM	Stourbridge	★★★★★	100%	Screening
<input type="checkbox"/> Sharon Mason	577468	22/07/2013 10:11AM	Shirley	★★★★★	100%	Screening
<input type="checkbox"/> Delia Smith	577464	22/07/2013 10:04AM	Wolverhampton	★★★★★	75%	Screening
<input type="checkbox"/> Amy Taylor	577465	22/07/2013 09:59AM	Wombourne	★★★★★	50%	Screening
<input type="checkbox"/> Ryan McBride	577469	22/07/2013 09:55AM	Pattingham	★★★★★	100%	Screening
<input type="checkbox"/> Diane Millard	577467	22/07/2013 09:51AM	Kidderminster	★★★★★	75%	Screening
<input type="checkbox"/> Harry Brown	577470	22/07/2013 09:49AM	Bilston	★★★★★	50%	Screening

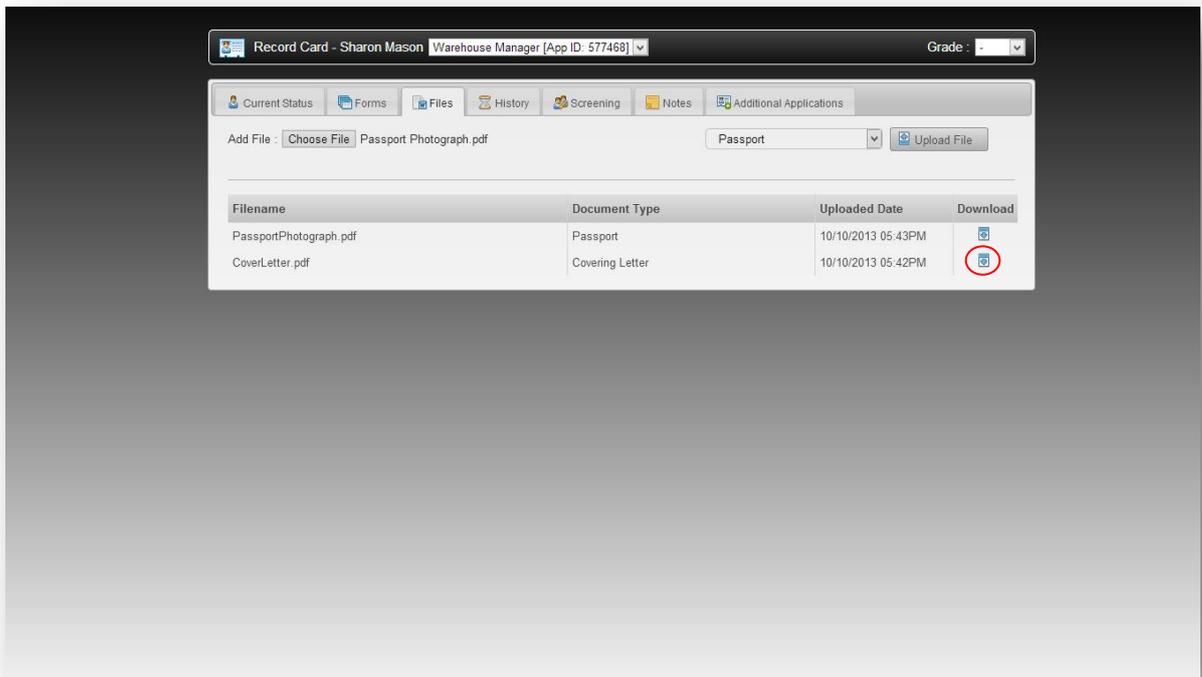
The record card will open in a new tab.

3. Download or Upload Candidate Files

In the record card click the **Files** tab.

Click the **Download** icon to open the file in a new tab. The file can be viewed and saved from here.

Figure 2: Files tab



To delete a file, click the file name and click **Remove**.

To upload a new file:

1. Click **Choose File** to locate the file
2. Set the **Document Type** in the dropdown selector
3. Click **Upload File**