

User Guide

Talent Bank

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1. Talent Bank Overview

The Talent Bank module allows you to search across your entire Candidate Database in great detail. Only HR Administrators have access to this module, not Hiring Managers.

This module helps you to identify potential employees for new roles that already want to work for you - *before you spend money on new job adverts or on agency fees.*

You can search using a combination of any of the following:

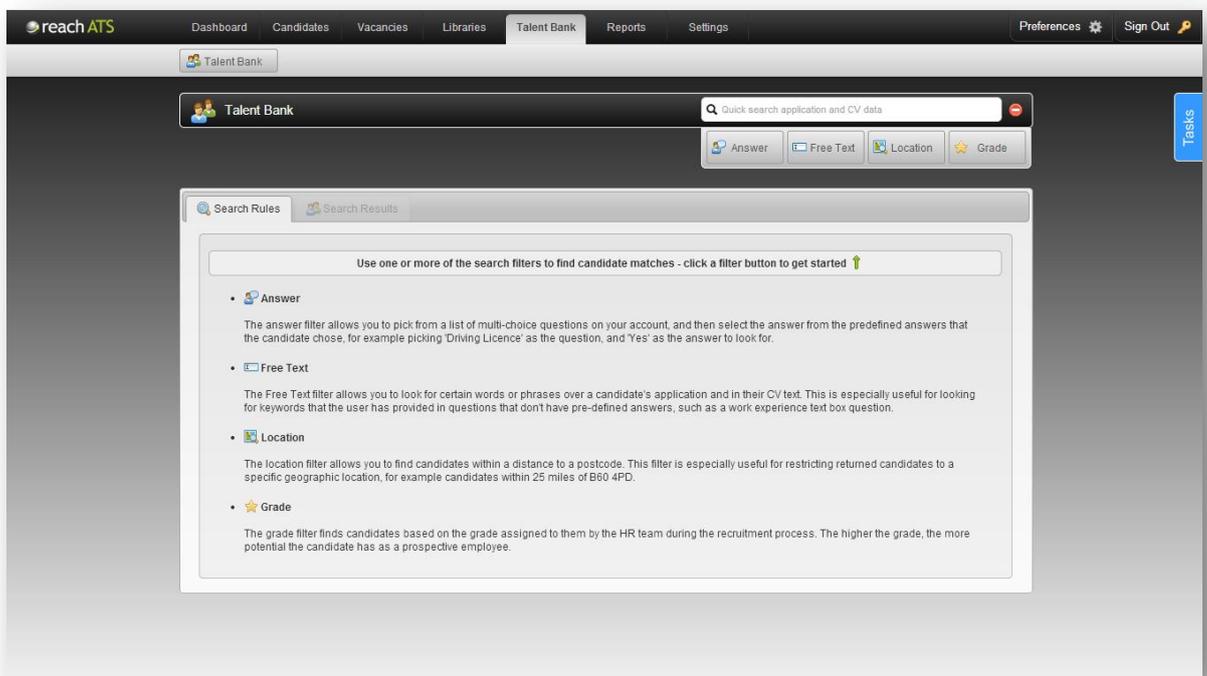
- Search based on the answers candidates gave to specific questions
- Search for keywords or phrases contained in candidate applications
- Search for candidates based on their proximity to specific postcodes
- Search based on the grades allocated to candidates by recruiters

Once you have identified candidates that maybe suitable for other roles you can choose to:

- Copy Selected Candidates to another vacancy
- Email the Selected Candidates with a new email or from an existing template

To start searching for candidates, click **Talent Bank** from the main menu

Figure 1: Talent Bank Screen

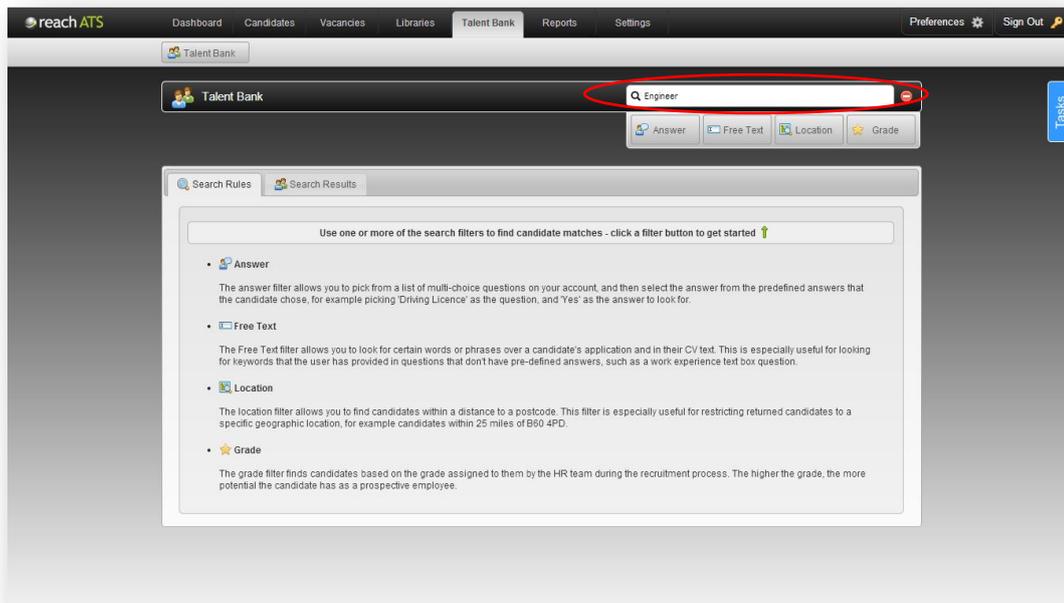


2. Quick Search

The fastest way to search the Talent Bank is to type a name, word or phrase into the Quick Search box at the top of the page.

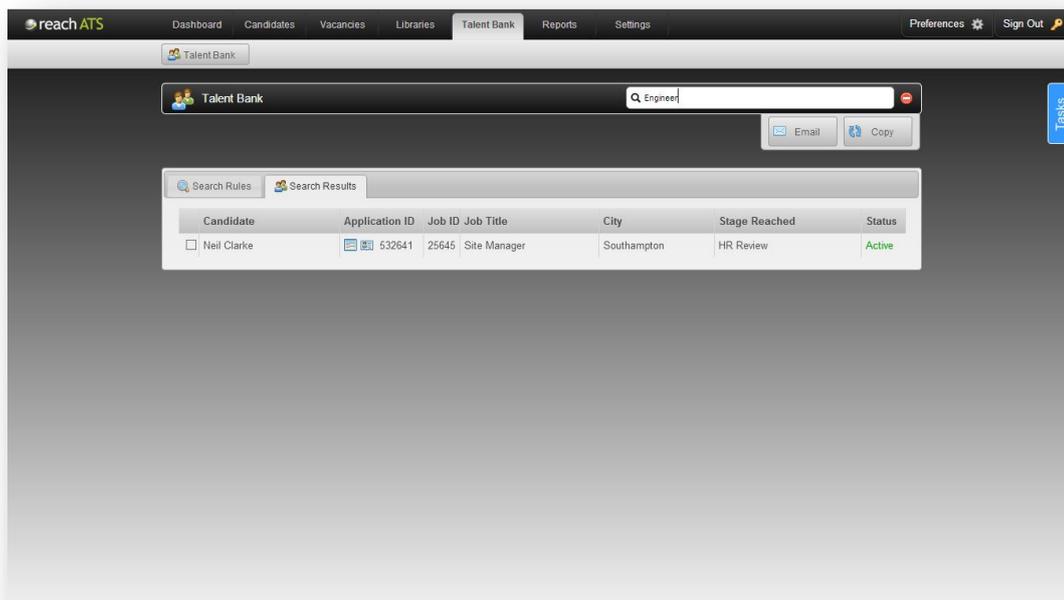
The quick search looks for matches across CVs as well as the application form and any other online forms that relate to a candidate.

Figure 2: Use the quick search for fast answers



Type a word or phrase into the quick search box then **Enter** on your keyboard.

Figure 3: Matching candidates will be shown immediately



3. Search Filters

Search filters help you to find matching candidates for your new vacancy and include:

Answer

- The answer filter allows you to pick from a list of multi-choice questions on your account, and then select the answer from the predefined answers that the candidate chose, for example picking 'Driving Licence' as the question, and 'Yes' as the answer to look for.

Free Text

- The Free Text filter allows you to look for certain words or phrases over a candidate's application and in their CV text. This is especially useful for looking for keywords that the user has provided in questions that don't have pre-defined answers, such as a work experience text box question.

Location

- The location filter allows you to find candidates within a distance to a postcode. This filter is especially useful for restricting returned candidates to a specific geographic location, for example candidates within 25 miles of B1 4PD.

Grade

- The grade filter finds candidates based on the grade assigned to them by the HR team during the recruitment process. The higher the grade, the more potential the candidate has as a prospective employee.

To add search filters, click on the relevant tab and enter your search criteria following the onscreen prompts.

You can add as many filters as are required to pinpoint suitable candidates, or remove filters as required.

Once the search filters have been set click **Run Search** to view matching candidates.

4. Search Answers

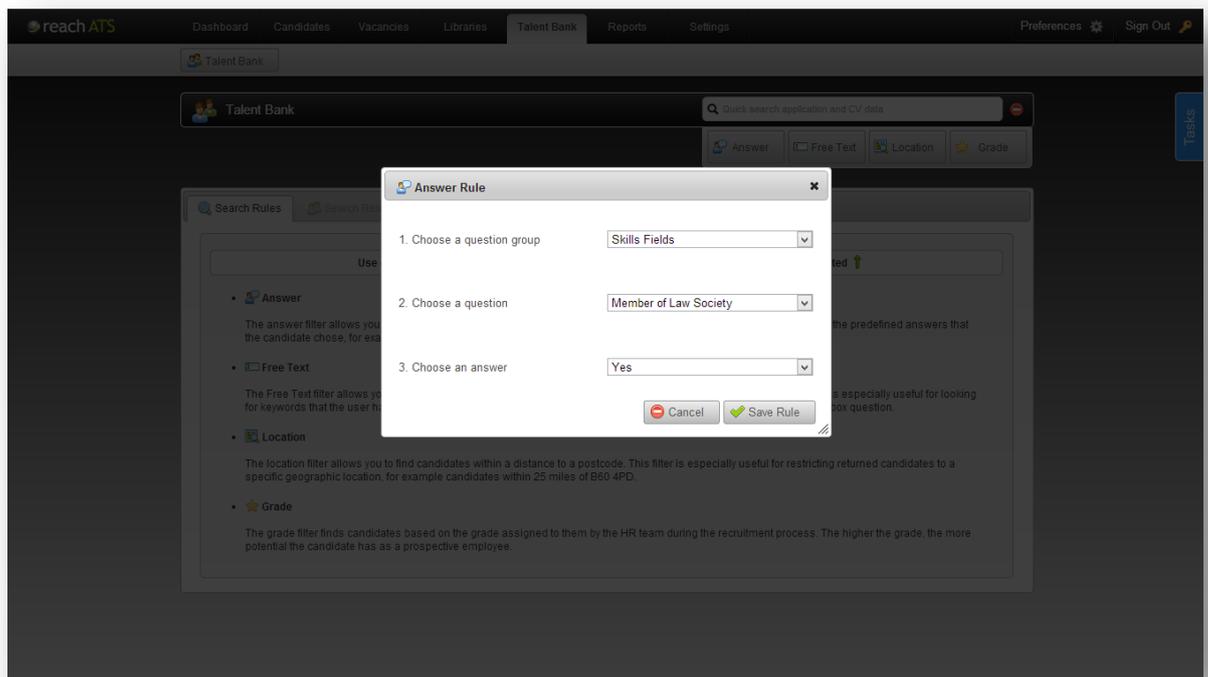
The **Answer** filter gives you the ability to search for candidates based on the answers they gave to specific questions on your online application forms.

For example, you could search for candidates that answered 'YES' to 'Are you CIMA qualified?'

To set an answer filter:

1. Click **Answer**
2. Choose a **Question Group** (e.g. *Preferences*)
3. Choose an individual **Question** (e.g. *Prefers Marketing*)
4. Choose an individual **Answer** (e.g. *Yes*)
5. Click **Save Filter**
6. Repeat as required to add more answer filters

Figure 4: Search Candidates by Question / Answer



The filter question & answer will now appear in the search filters tab.

To find matching candidates click **Run Search**.

You can use the Answer filter on its own or in combination with any other filter types.

5. Search Free Text

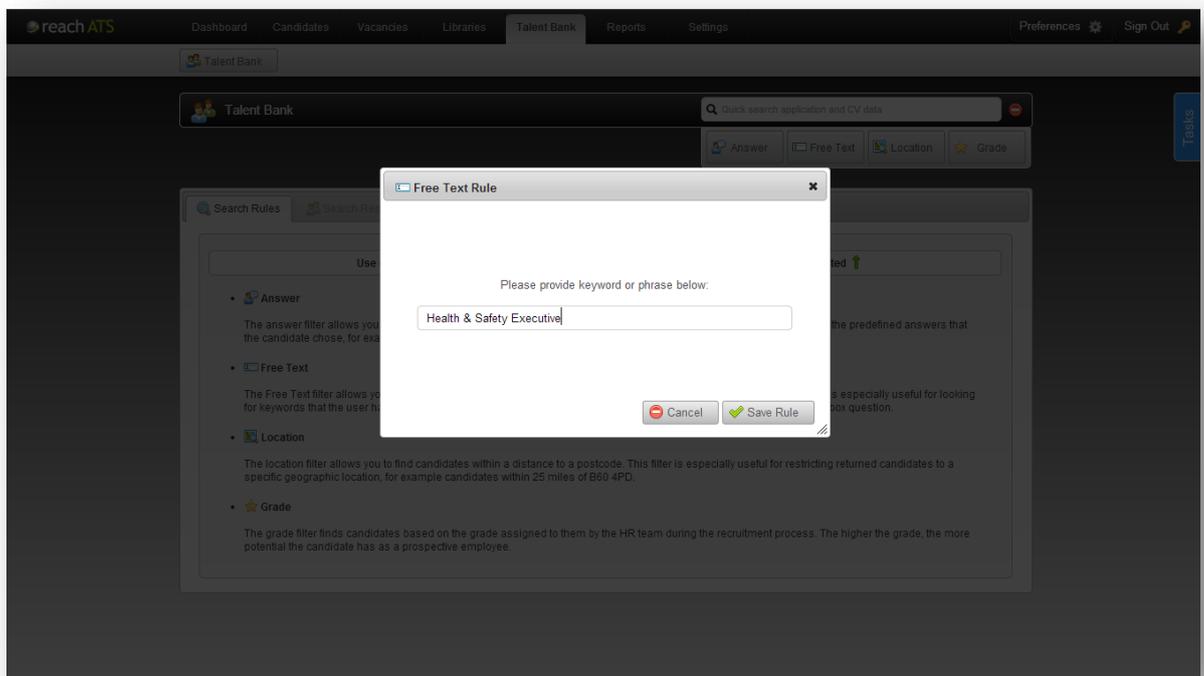
The free text filter gives you the ability to look for specific words or phrases that candidates have mentioned in their online application or CV.

For example, you could search for candidates that have mentioned the name of one of your competitors, or a specific qualification during their application.

To set a Free Text filter:

1. Click **Free Text**
2. Enter any number of keywords or phrases
3. Click **Save Filter**

Figure 5: Keyword or Phrase Searching



The filter question & answer will now appear in the search filters tab.

To find matching candidates click **Run Search**.

You can remove specific Free Text filters at any time by clicking the **Remove** icon in the Search Filters tab.

You can use the Free Text filter on its own or in combination with any other filter types.

6. Search by Postcode Proximity

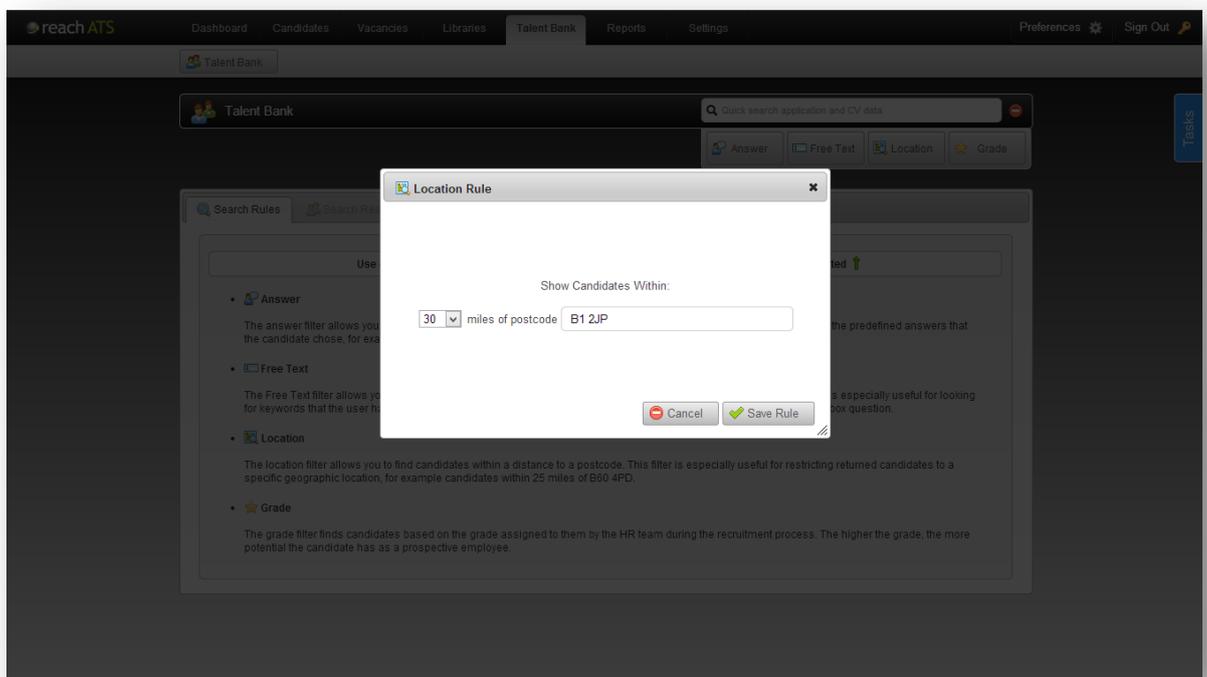
The **Location** filter gives you the ability to find candidates who are based within a specific distance to a specific postcode.

For example, you could find all candidates who are based within 25 miles of B1 2JP.

To set a location filter:

1. Click **Talent Bank > Location**
2. Enter the specific **Postcode**
3. Set the **Miles Radius** from the postcode
4. Click **Save Filter**

Figure 6: Search Candidates by Postcode Proximity



The postcode filter will now appear in the **Search Filters** tab.

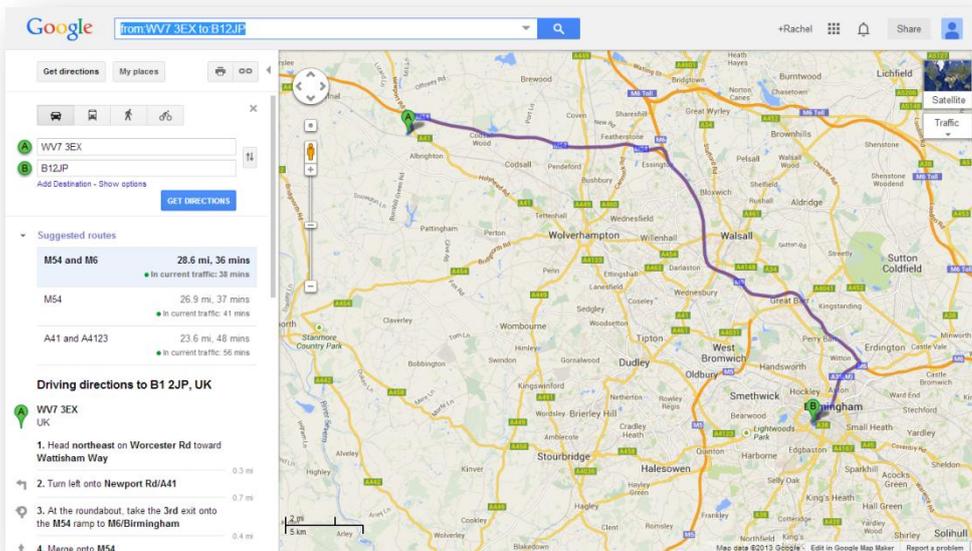
To find matching candidates click **Run Search**.

You can remove specific postcode filters at any time by clicking the **Remove** icon in the Search Filters tab.

You can use the Answer filter on its own or in combination with any other filter types.

In the Search Results, each matching candidate shows the distance in miles from the postcode. Click onto the distance link to see a Google Map with Directions (which could be shared with the candidate).

Figure 7: Click the mileage distance to open onscreen directions for the candidate



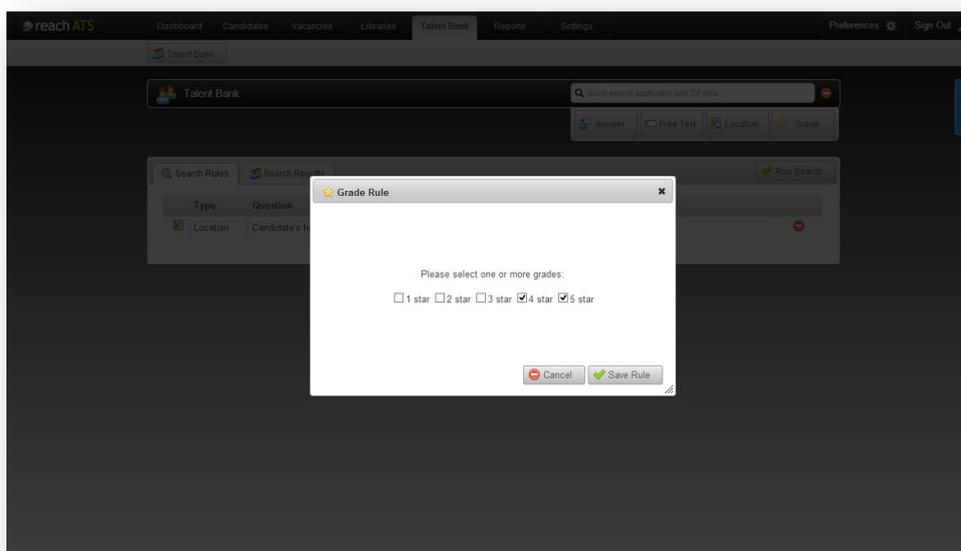
7. Search by Recruiter Grade

The **Grade** filter gives you the to show candidates based on the **Recruiter Grade** assigned to them by the HR Administrator or Hiring Manager during the application review stages.

To set a grade filter:

1. Click **Talent Bank > Grade**
2. Tick the **Star** check boxes as appropriate
3. Click **Save Filter**

Figure 8: Search Candidates by Recruiter Grade



The grade filter will now appear in the search filters tab. To find matching candidates click **Run Search**.

You can use the Grade filter on its own or in combination with any other filter types.

8. Search Results

When you have set your Search Filters and clicked Run Search, the **Search Results** tab is shown.

Figure 9: Example talent bank search results listing

Candidate	Application ID	Job ID	Job Title	City	Stage Reached	Status
<input type="checkbox"/> Emma Johnson	530710	25634	Assistant Housing Officer	Swansea - 16mi	HR Review	Active
<input type="checkbox"/> Harry Brown	577470	25778	UK Business Systems Analyst	Bilston - 5mi	Screening	Active
<input type="checkbox"/> Rita Parsons	577453	25778	UK Business Systems Analyst	Kingswinford - 9mi	Contract of Employment	Active
<input type="checkbox"/> Amy Richardson	529731	25633	Legal Counsel	Birmingham - 15mi	Screening Decision	Active
<input type="checkbox"/> Test Application	568853	25655	Legal Secretary	Birmingham - 16mi	Interview Outcome	Active
<input type="checkbox"/> Sharon Mason	577468	25778	UK Business Systems Analyst	Shirley - 24mi	Screening	Active
<input type="checkbox"/> Ray Halford	553211	25667	Scientific Software Engineer	16mi	Additional Form Test	Active
<input type="checkbox"/> Lisa Ann Jackson	529741	25633	Legal Counsel	Wolverhampton - 22mi	Screening	Active
<input type="checkbox"/> Paul Jewel	553540	25655	Legal Secretary	London - 16mi	Interview Outcome	Active
<input type="checkbox"/> Mark Halpert	546644	25621	Sales Assistant - Solihull	Birmingham - 16mi	HR Review	Active
<input type="checkbox"/> Delia Smith	577464	25778	UK Business Systems Analyst	Wolverhampton - 3mi	Screening	Active
<input type="checkbox"/> Graham Leech	553190	25667	Scientific Software Engineer	16mi	Additional Form Test	Active
<input type="checkbox"/> Oluwaseyitan Chowdhury	529732	25633	Legal Counsel	Birmingham - 14mi	Screening	Active
<input type="checkbox"/> Dee Boylen	553538	25655	Legal Secretary	London - 18mi	Interview Outcome	Active
<input type="checkbox"/> John Vermont	553210	25667	Scientific Software Engineer	16mi	Generate Offer Letter	Active
<input type="checkbox"/> Adil Singh	577459	25778	UK Business Systems	Wolverhampton - 0mi	Screening	Active

The listing shows all candidates that match your specific criteria and shows:

- **Candidate Name**
- **Application ID**
- **Link to Application Form**
- **Link to Record Card**
- **Job ID**
- **Job Title**
- **City**
- **Distance from postcode & directions link (if location filter used)**
- **Stage Reached**
- **Status (Active, Rejected, Withdrawn, On Hold)**

A **Checkbox** next to each candidate allows you to:

- **Copy Selected Candidates to a New Role**
- **Email the Selected Candidates with a new email or from an existing template**

To start a new search or to amend the filters on an existing search, click **Search Filters** tab and add or remove filters as necessary.

9. Copy Selected Candidates to a New Vacancy

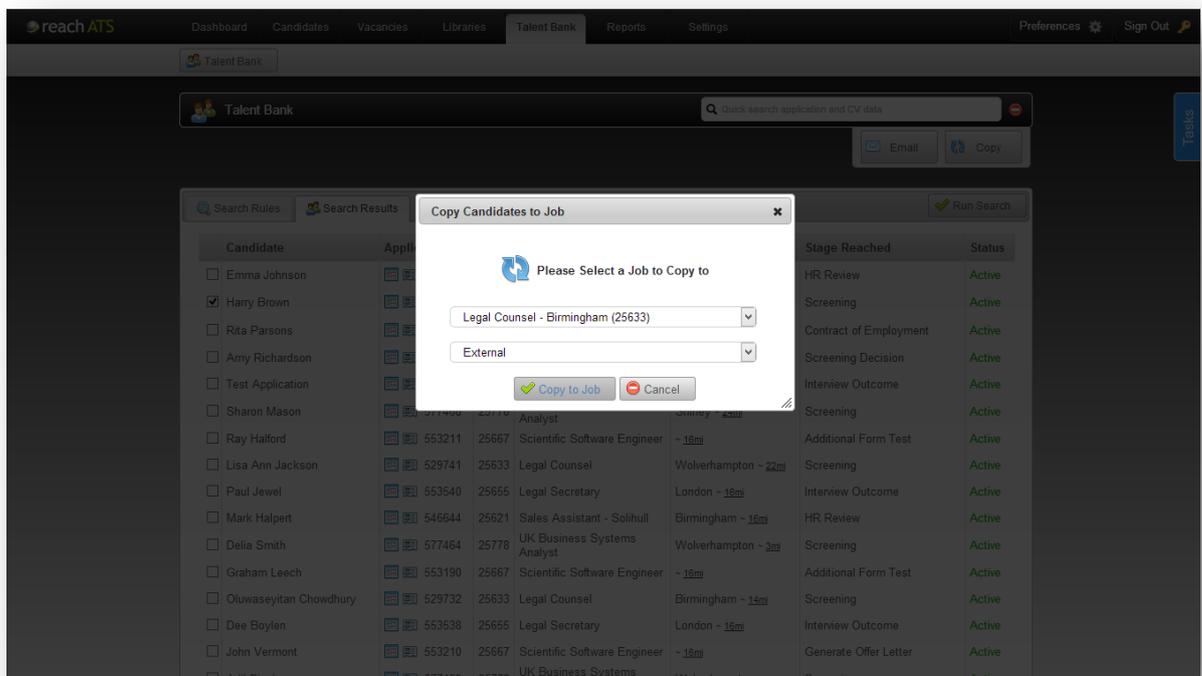
When you have identified candidates that match your specific search criteria, you can copy their application details to a new vacancy.

This saves the candidate from entering their details from scratch when their details already are stored in your database.

To copy candidates to a new job:

1. Run your search and find matching candidates in the **Search Results** tab
2. Tick the **Checkbox** of candidates to copy
3. Click **Copy**
4. Select a **Job** from the drop down list of live roles
5. Select the appropriate **Workflow** for the candidates to be copied onto
6. Click **Copy to Job**

Figure 10: Copy selected candidates to a new vacancy



The candidate will now appear as an **Incomplete** candidate on the new job and will automatically receive an email thanking them for applying for the new job.

10. Send an Email to Selected Candidates

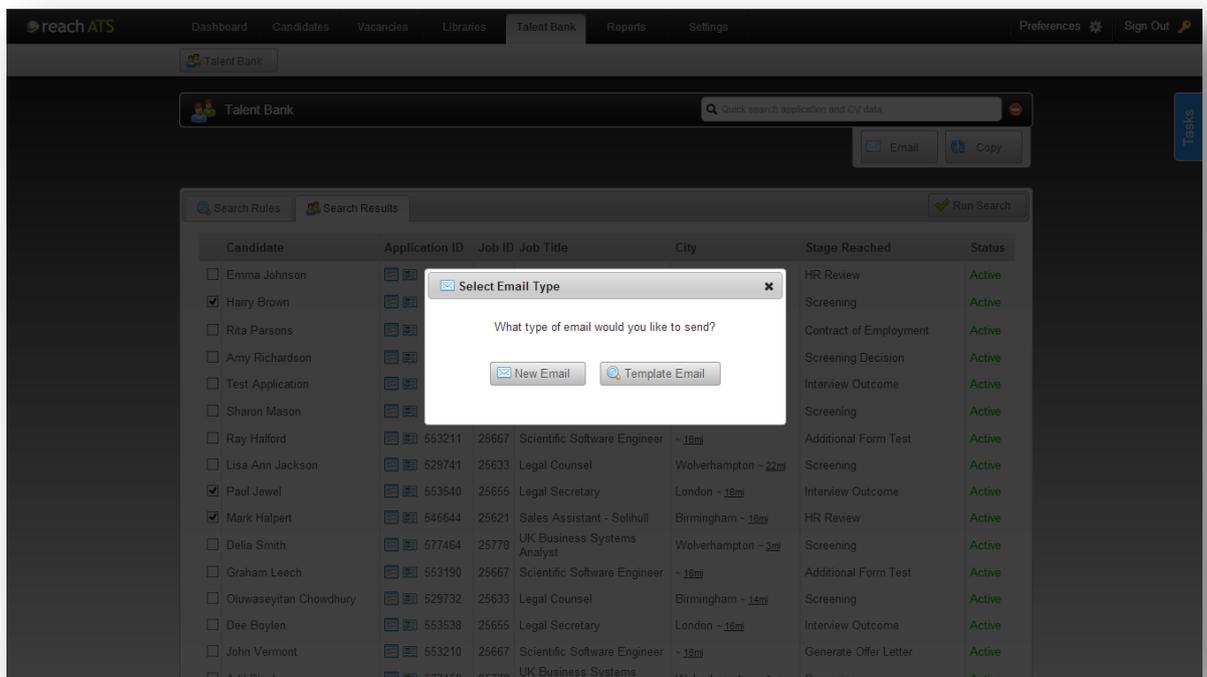
When you have identified candidates that match your specific search criteria, you can send them an **Email**.

You can choose to send a brand new ad-hoc email or to use an existing email template.

To email selected candidates:

1. Run your search and find matching candidates in the **Search Results** tab
2. Tick the **Checkbox** of candidates to email
3. Click **Email**
4. Select either send **New Email** or **Template Email**
5. If **New Email**, write the email and Send
6. If **Template Email**, select Template and click **Send to Selected Candidates**

Figure 11: Send Email to Selected Candidates



The selected email will be sent immediately and individually to the selected candidates.