

## Quick Start Guide

# **Progressing Candidates**

Prepared By: Reach Support

Strictly Commercial in Confidence





### 1. Load the candidate list

Access the **Candidates** tab and select the vacancy.

Click onto the relevant tab (e.g. Interview) and click the name of the candidate to be progressed.

Figure 1: Load the candidate list and access the candidate's options bar

Candidate     App ID     Application Date     Location     Grade     Score     Stage       Francis Turner     577452     3     17/09/2013 11:44AM     Bedford     ************************************
□       Francis Tumer       577452 Image: 3 17/09/2013 11:44AM       Bedford       ★★★★★★       100%       Schedule Interview         □       Mohammed Kapur       577455 Image: 3 22/07/2013 10:44AM       Wolverhampton       ★★★★★★       100%       Interview Outcome         □       Robert Williams       577456 Image: 3 22/07/2013 10:40AM       Briefey Hill       ★★★★★★       75%       Interview Outcome
Mohammed Kapur     577455 Image: 22/07/2013 10:44AM     Wolverhampton     ★★★★★★     100%     Interview Outcome       Robert Williams     577456 Image: 22/07/2013 10:40AM     Brierley Hill     ★★★★★★     75%     Interview Outcome
Robert Williams 577456 🔄 🔮 22/07/2013 10:40AM Brierley Hill 😭 😭 😭 👘 75% Interview Outcome
🗮 Card 📔 🖷 Rec Forms 📔 🧇 Progress 🤤 Reject 😫 Withdraw 🖤 Hold 🛛 🖾 Email 🛛 Grade : - 💌
Peter Bailey 577458 🗐 🔮 22/07/2013 10:31AM West Bromwich 🔶 🚖 🚖 🚖 👘 🚺 Interview Outcome
Carol Dunn 577462 🗐 🕹 22/07/2013 10:18AM Stourbridge 🛠★★★ 100% Schedule Interview
Catherine Highfield 577463 🗐 🔮 22/07/2013 10:14AM Dudley 🛠 🛠 🛠 🎗 75% Inteniew Outcome
□ Brian Gilroy 577466 🗏 🚨 22/07/2013 10:09AM Solihull 🔶 ★★★★★ 100% Inteniew Outcome
Shaun Reilly 51/451 🖻 a 21/07/2013 10:10PM Bedford

### 2. Progress the candidate

Click Progress in the options bar.

An information panel will appear on screen to confirm the candidate's current stage and the next stage they will reach when you progress their application.

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

A link to view the workflow is displayed for your convenience.

To progress the candidate's application, click Yes.

### reach ATS<sup>®</sup>



The candidate will progress to the next stage of the recruitment process and the candidate listing will be updated instantly.

### 3. Progress a candidate if a recruiter form is required

Recruiter Forms allow recruiters to input specific details relating to the candidate's application e.g. *interview time & date, salary, start date, hours of work etc.* 

Recruiter Forms may be automatically presented for completion based on the workflow stage.

For instance when a candidate reaches the **Schedule Interview** stage, a **Setup Interview Details** recruiter form may be presented to the recruiter to fill in.

Until the form has been completed, the candidate will not be able to progress to the next stage.

This ensures, for instance, that an *Interview Confirmation* email is not sent to candidates with blank fields where the date, time, venue etc. of the interview should appear.

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 or Progress (either button opens the same screen)
- 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



Screen 10 23 Shortlist	Outstanding Forms to Complete	→ Job Selection 🖌	
Candidate Re	Click here to add an ad-hoc form Required Forms  A Francis Turner cannot be progressed until the following forms are complete:		
Card Rec Fo &	Recruiter Form <u>Setup Inteniew</u>	~	
Peter Bailey     Carol Dunn	Francis Turner has no outstanding optional forms at th	is stage.	
	577463         E         22/07/2013 10:14AM         Dudley           577466         E         2         22/07/2013 10:09AM         Solihull           577471         E         21/07/2013 10:10PM         Bedford		

Figure 3: Complete the required form(s) before progressing the candidate

When you have completed the form, you can progress the candidate as normal by clicking **Progress**.

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

### 4. Progressing Multiple Candidates at the same time

To progress selected candidates at the same time:

- 1. In the candidate listing, tick the checkbox next to each candidate to action
- 2. Click the Actions tab
- 3. Click Progress

#### reach ATS ices 🙀 Sign Out 🔎 ard Candidates Candidate Listing - Procurement Administrator [ID: 25778] 0 a Y Pr -🖫 Screen 10 🗱 Shortlist o 😰 Interview s 👶 Offer o 📄 Contract 2 💩 Appointed o 🕼 Ont Candidate App ID Application Date Location Grade Score Stage App I/J Appl/Cation Date Location Francis Turner 577452 17/09/2013 11.44.AM Bedford Mohammed Kapur 577452 2207/2013 10.44AM Wolvehampton Robert Williams 577455 2207/2013 10.44AM Brierby Hill Peter Bailey 577458 2207/2013 10.31AM West Bromwich ★★★★★ 100% Schedule Interview ★★★★★ 100% Interview Outcome \*\*\*\* 75% Interview Outcome \*\*\*\* 100% Interview Outcome Carol Dunn 577462 🗐 🚨 22/07/2013 10:18AM Stourbridge \*\*\*\* 100% Schedule Interview Catherine Highfield 577463 🗐 🚨 22/07/2013 10:14AM Dudley \*\*\*\* 75% Interview Outcome 577466 🔄 🚨 22/07/2013 10:09AM Solihull Brian Gilroy \*\*\*\* 100% Interview Outcome 577451 🗐 🚨 21/07/2013 10:10PM Bedford \*\*\*\*\* 100% Schedule Interview Shaun Reilly

Figure 4:

Click Actions to progress multiple candidates