

User Guide

Candidates



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Strictly Commercial in Confidence



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Page

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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
I Iguic		301000

Andidate Listing - Select Job		Q Candidate Searc	n. Enter app IC) or name	•
JOB STATUS Live V OPER	ATING DIVISION All	▼ ROLE All			•
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 Location: Solihull	Closing Date: 25/12/2013 HR Administrator: Amanda Clark	Hiring Managers:	Kevin Dalto Richard Ha	n Istead	
> 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

Screen 10 🗱 Shortlist	1 Selinterview 7 🚨 Offer a 🔡 🕻	Contract 2 👌 Appointed o 👘 🧐	Onboard o	
Candidate	App ID Application Date	Location Grade	Score	Stage
🗌 Ayesha Gupta	577457 🔚 🚨 22/07/2013 10:38AM	I Cosford 常常常常	* 75%	Screening
Adil Singh	577459 🗏 🖁 22/07/2013 10:29AM	Wolverhampton ***	100%	Screening
Tom Jones	577460 🗏 🖁 22/07/2013 10:22AM	Wolverhampton	* 75%	Screening
Shelly Cutler	577461 📃 🚨 22/07/2013 10:20AM	I Stourbridge 🔶 🚖	100%	Screening
Sharon Mason	577468 22/07/2013 10:11AM	I Shirley	100%	Screening
🗌 Delia Smith	577464 📃 🌡 22/07/2013 10:04AM	l Wolverhampton 🔶 🚖	* 75%	Screening
Amy Taylor	577465 🔤 22/07/2013 09:59AM	I Wombourne	\$ 50%	Screening
🗌 Ryan Mcbride	577469 📃 🚨 22/07/2013 09:55AM	I Pattingham	100%	Screening
Diane Millard	577467 📃 🖁 22/07/2013 09:51AM	I Kidderminster	* 75%	Screening
Harry Brown	577470 📃 🌡 22/07/2013 09:49AM	Bilston	\$ 50%	Screening

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
5	

Eorm Viewer			🕒 Print
	Sharon Mason		
	Application for Procurement Administrator		
	Applicant : 577468		
	PERSONAL DETAILS		
	Title First Name Surname Email Address Address Town / City County County Postcode Home Telephone Mobile Number National Insurance Number	Mrs. Sharon Mason smas0@yahoo123.com Flat 4, The Greenway Shirley West Midlands United Kingdom B90 3AU 0121 444 5555 07876 111111 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).

Workflow Ov Housing Officers	erview	St John Ambulance
This workflow is used to proc	ess candidates for Housing Officers e.g. Neighbourhood Housing Officer	
STAGE NAME	DESCRIPTION	
SCREENING	Hiring Manager reviews the candidate's Application Form (and CV if supplied) or MAYBE. When each allocated Hiring Manager has screened the candidate complete and moves the candidate to the next stage – Screening Decision Stage Emails	and grades the candidate as 'YES', 'NO' e, this action marks the stage as
SCREENING DECISION	HR reviews the Hiring Manager's screening feedback in the 'SCREENING' tab the feedback the recruiter rejects the candidate or marks the candidate as sur complete and moves the candidate to the next stage – Shortlisted. Stage Emails Con rejection send "Failed Screening" Additional Forms	of the Candidate Record Card. Based on ccessful. This action marks the stage as

Figure 4: Checking the recruitment process for the job



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

Figure 5:

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.

Options Bar

Candidate Listing - Procu	rement Administrator [ID : 257	78]	Q Ca	ndidate Se	earch. Enter app ID or name
					- Job Selection
Screen 10 Shortlist 1	Pinterview 7	E Contract 2 🍐 Appo	inted o 👘 🎯 Onboa	ard o	
Candidate	App ID Application	Date Location	Grade	Score	Stage
Ayesha Gupta	577457 🔄 🚨 22/07/2013 10	:38AM Cosford	****	75%	Screening
Adil Singh	577459 🔄 🚨 22/07/2013 10	29AM Wolverhampton	****	100%	Screening
Tom Jones	577460 🗏 🚨 22/07/2013 10	22AM Wolverhampton	****	75%	Screening
Shelly Cutler	577461 📃 🚨 22/07/2013 10	20AM Stourbridge	****	100%	Screening
Sharon Mason	577468 🔄 🚨 22/07/2013 10	11AM Shirley	***	100%	Screening
🖾 Card 📔 🖻 Rec Forms	s 📔 🛩 Progress 🧧 🤤 F	leject 🗾 💆 Withdraw	🖲 Hold 📘 🖂	Email	Grade : -
Delia Smith	577464 📃 🚨 22/07/2013 10	:04AM Wolverhampton	****	75%	Screening
Amy Taylor	577465 🗐 🖁 22/07/2013 09	:59AM Wombourne	***	50%	Screening
🗌 Ryan Mcbride	577469 📃 🌡 22/07/2013 09	:55AM Pattingham	****	100%	Screening
Diane Millard	577467 📃 🚨 22/07/2013 09	51AM Kidderminster	***	75%	Screening
Harry Brown	577470 🔄 🖁 22/07/2013 09	.49AM Bilston	会会会会会	50%	Screening



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.







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

		Candidate Search. Enter app D or name
Screen 10 🎎 S	2 Candidate Progression	×
Candidate	Sharon Mason, App ID: 577468 for Procurement Administrator	view workflow
🔲 Ayesha Gupta	Current Stage Screening	
Adil Singh	Next Stage Screening	
Shelly Cutler	Next stage Screening Decision	
Sharon Mason	• Vo entans die seit entering uns sta	ye
Card III	Would you like to progress Sharon to Screening Decision?	Yes No
	,	
	577464 🖂 🛎 22/07/2013 10:04AM Wolverhampton	
	577469 🖂 🎍 22/07/2013 09:55AM Pattingham	
	577467 🖂 🕹 22/07/2013 09:51AM Kidderminster	
	577470 🗐 🚨 22/07/2013 09:49AM Bilston	

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



	🎤 Incomplete Candidates 🔤 Rejected Candidates 📗 🔩 Withdraw		
		Q, Candidate Search. Enter app ID or name	
	Candidate Rejection	* Hection 🖗 Actions	
Screen 10	Sharon Mason, App ID: 577468 for Procurement Administrator	view workflow	
Candidate	Current		
🗌 🛛 Ayesha Gupta	Stage Screening		
Adil Singh	 M On rejection sends "Failed Screening" 		
Tom Jones	Notes lack of suitable experience in a similar role		
Shelly Cutler			
Sharon Mason			
🗌 Delia Smith	Are you want to reject Sharon?	Yes ONO	
Amy Taylor			
	577469 🔚 🚨 22/07/2013 09:55AM Pattingham		
	577467 🔄 🚨 22/07/2013 09:51AM Kidderminster		
	577470 🖃 🚨 22/07/2013 09:49AM Bilston		

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.

Point a candidate's application

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.

Eiguro 0.



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
1 1541 4 71	complete a	jion bubeu	reeraicer	,



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

PLEASE SELECT A FORM TO COMPLETE	
Name	Туре
Checkbox Skills	Recruiter Form
Contract Setup - Merge Cares	Recruiter Form
Contract Setup - Sales Advisors	Recruiter Form
Contract Setup - Solicitors	Recruiter Form
Contract Setup - Store Managers	Recruiter Form
Contract Setup Reach New Starters	Recruiter Form
Contract Setup Testing Form	Recruiter Form
Interview Details	Recruiter Form
Lecturing Skills	Recruiter Form
Legal Skills	Recruiter Form
Manager Interview Availability	Recruiter Form
New Employee Setup Form Click to complete Manager Interv	Recruiter Form
Setup Interview	Becruiter Form
Setup Phone Call	Recruiter Form
Upload CRB Documentation	Recruiter Form
Contract Acceptance	Candidate Form
Criminal Records Check	Candidate Form
Medical Details	Candidate Form
Membership of Professional Bodies	Candidate Form
Previous Employer	Candidate Form

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

						Re	ject the selected candidates Actions
	Screen 10 🏭 Shortlist 0	Se Interview a	Gffer o R C	ontract 2 🔒 Appointe	d o 😺 Onbi	oard o	
	Candidate	App ID	Application Date	Location	Grade	Score	Stage
	Francis Turner	577452 🔄 🚨	17/09/2013 11:44AM	Bedford	****	100%	Schedule Interview
 Image: A start of the start of	Mohammed Kapur	577455 🔄 🏖	22/07/2013 10:44AM	Wolverhampton	****	100%	Interview Outcome
~	Robert Williams	577456 🖭 🚨	22/07/2013 10:40AM	Brierley Hill	****	75%	Interview Outcome
	Peter Bailey	577458 📰 🚨	22/07/2013 10:31AM	West Bromwich	****	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
	Brian Gilroy	577466 📃 🚨	22/07/2013 10:09AM	Solihull	****	100%	Interview Outcome
	Shaun Reilly	577451 🔄 🚨	21/07/2013 10:10PM	Bedford	****	100%	Schedule Interview

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.

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_							
	Candidate Search		Filter All Fields	Q Georgia) =	
	Search Results						
	Application ID Candidate	Job ID	Job Title	Stage	Status	Matches	
	🔄 📖 557707 Georgia Francis	25727	Main Grade Lecturer Maths	Interview Decision	Active	2	

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.