

User Guide

Talent Bank



Strictly Commercial in Confidence





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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

A Talent Bank Q Engineer
🚱 Answer 🖉 Free Text 🗟 Location 👷 Grade
🔍 Search Rules 🏽 🤹 Search Results
Use one or more of the search filters to find candidate matches - click a filter button to get started 🕇
 Answer Answer The answer filter allows you to pick from a list of multi-choice guestions on your account, and then select the answer from the predefined answers that the candidate chose, for example picking Driving Licence's as the question, and 'res' as the answer to took for. Improve Tere Text The Free Text filter allows you to lock 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. Improve the filter allows you to lock 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. Improve the filter allows you to filter allows you to filter allow and the pre-defined answers. Incation Incation Cardee 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

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

Figure 3: Matching candidates will be shown immediately

Talont Pank		O Francis			
		C Lugitool	Email	Copy	
🔍 Search Rules 🛛 🥵 Search	nResults				
Candidate	Application ID Job ID Job Title	City	Stage Reached	Status	
Neil Clarke	🗐 🖲 532641 25645 Site Manager	Southampton	HR Review	Active	



3. Search Filters

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

<u>Answer</u>

• 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.

<u>Grade</u>

• 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

reach ATS	Dashboard Candidates Vacancies Libraries Talent Bank R	eports Settings	Preferences 🔅 Sign Out 🏓
		Q Quick search application and CV data	e system
	Answer Rule	×	
	Use	Skills Fields	
	Answer 2. Choose a question The answer filter allows you the candidate chose for exit	flember of Law Society	
	ED Free Text 3. Choose an answer The Free Text filter allows yo for keywords that the user h	fes iespecially useful for looking Cancel Save Rule	
	Eq. (ccation The location first allows you to find candidates within a distance to a postcoor specific geographic location, for example candidates within 25 miles of B60 & crade	e. This filter is especially useful for restricting returned candidates to a PD.	

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

reach ATS	Dashboard Candidales Vacancies Libraries Talent Bank Reports Settings Preferences 🔆 Sign Ou	t 🔎
	💑 Talent Bank Q. Guick search application and CV data 😑	iks
	🔗 Answer 🛛 📼 Free Text 🗍 🖻 Location 🗋 🚖 Grade	Tas
	Search Rule Image: Free Text Rule Use Image: Free Text Rule Image: Please provide keyword or phrase below: Image: Free Text Rule Image: Please provide keyword or phrase below: Image: Free Text Rule Image: Please provide keyword or phrase below: Image: Free Text Rule Image: Please provide keyword or phrase below: Image: Free Text Rule Image: Please provide keyword or phrase below: Image: Free Text Rule Image: Please please provide keyword or phrase below: Image: Free Text Rule Image: Please	

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

Answer Free Text The Pree Text	
Use Show Candidates Within: Use Show Candidates Within: The answer filter allows you the candidate chose, for each 30 v miles of postcode B1 2JP the predefined answers that The Free Text The Free Text The Free Text Save Rule	
Use Image: Show Candidates Within: • ● Answer Show Candidates Within: The answer filter allows you 30 ♥ miles of postcode Image: The candidate chose, for each 90 ♥ miles of postcode Image: Free Text The Free Text The Free Text Image: Save Rule Image: The Yeave Rule Save Rule	
Use Show Candidates Within: • Show Candidates Within: The answer filter allows you the candidate chose, for exa • ID Free Text The Free Text The Free Text The Free Text The Free Text The Save Rule	
Show Candidates Within: • Show Candidates Within: The answer lifer allows you the candidate chose, for exa • Free Text The Free Text The Free Text For Keywords that the user h. • Cancel Save Rule • Save Rule	
The answer filter allows you the candidate chose, for exa I Free Text The Free Text The Free Text filter allows you for keywords that the user h	
The candidate chose, for exa	
the Free Text The Free Text filter allows ys for keywords that the user it	
for keywords that the user h:	
• 🔣 Location 777	
• 🚖 Grade	

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

	Q. Quick search application and CV data	
Grade Rules Grade Rule	×	
Type Question		
Location Candidate's h		
Please select one	or more grades:	
1 star 2 star 3	star ♥4 star ♥5 star	
	Cancel 🛷 Save Rule	

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.

reach ATS	Dashboard Candidates Va	acancies Libra	ries	Talent Bank Reports	Settings		Preferences	🛱 Sign Out
	🛃 Talent Bank							
	🕵 Talent Bank				Q Quick search ap	plication and CV data	9	
						Email	Copy	
	Search Rules Search R	tesults		_	_	(🖋 Run Search	
	Candidate	Application ID	Job ID	Job Title	City	Stage Reached	Status	
	Emma Johnson	📰 🛒 530710	25634	Assistant Housing Officer	Swansea ~ <u>16mi</u>	HR Review	Active	
	Harry Brown	577470	25778	UK Business Systems Analyst	Bilston ~ <u>5mi</u>	Screening	Active	
	Rita Parsons	577453	25778	UK Business Systems	Kingswinford ~ 9mi	Contract of Employment	Active	
	Amy Richardson	529731	25633	Legal Counsel	Birmingham ~ <u>15mi</u>	Screening Decision	Active	
	Test Application	568853	25655	Legal Secretary	Birmingham ~ <u>16mi</u>	Interview Outcome	Active	
	Sharon Mason	📰 📰 577468	25778	UK Business Systems	Shirley ~ 24mi	Screening	Active	
	Ray Halford	📰 📰 553211	25667	Scientific Software Engineer	~ <u>16mi</u>	Additional Form Test	Active	
	Lisa Ann Jackson	529741	25633	Legal Counsel	Wolverhampton ~ 22mi	Screening	Active	
	Paul Jewel	553540	25655	Legal Secretary	London ~ <u>16mi</u>	Interview Outcome	Active	
	Mark Halpert	🔄 📰 546644	25621	Sales Assistant - Solihull	Birmingham ~ <u>16mi</u>	HR Review	Active	
	Delia Smith	📰 📰 577464	25778	UK Business Systems Analyst	Wolverhampton ~ 3mi	Screening	Active	
	Graham Leech	E 📰 553190	25667	Scientific Software Engineer	~ <u>16mi</u>	Additional Form Test	Active	
	Oluwaseyitan Chowdhury	📰 📰 529732	25633	Legal Counsel	Birmingham ~ <u>14mi</u>	Screening	Active	
	Dee Boylen	🔄 📰 553538	25655	Legal Secretary	London ~ <u>16mi</u>	Interview Outcome	Active	
	John Vermont	553210	25667	Scientific Software Engineer	~ <u>16mi</u>	Generate Offer Letter	Active	
	Adil Singh	577459	25778	UK Business Systems	Wolverhampton ~ 0mi	Screening	Active	

Figure 9: Example talent bank search results listing

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

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					Q Quick search app	lication and CV data	•	Isks
								μ
	🔍 Search Rules 🖉 Search R	esuits Copy (Candidates to Job		×			
		Appli						
			Please	Select a Job to	Copy to			
	Harry Brown							
			.egal Counsel - Birmi	ngham (25633)	×			
			External		*			
			🧇 Copy t	o Job 🤤 Cano	cel			
		E 📰 377400	Analyst		Sinney ~ 24m			
				Software Engineer				
	Adil Singh	577459	25778 UK Busine	ss Systems	Wolverhampton ~ 0mi	Screening	Active	

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

		Q Quick search application and GV data				
🔍 Search Rules 🛛 🧟 Search R						
		aleat Email Tune	×			
Harry Brown		elect Lindii Type	^			
		What type of email would you like	to send?			
		New Email 🔍 Templat	e Email			
	553211	25667 Scientific Software Engineer	~ <u>16mi</u>			
✓ Paul Jewel						
Mark Halpert						

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