

Candidates – Individual – Documents Tab

The Documents Tab for your Candidate record displays any current Documents you have related to the Candidate.

Viewing & Downloading Documents

- Click on the Document Filename to Open or Save the document to your computer.
- Select Open or Save and click OK

Uploading a New Document

You can click 'Upload a file' to upload a new Document and save it with your Candidate record:

- Click 'Upload a file'
- Browse to the file you want, and click the file to select it
- Click 'Open'
- Your file will be uploaded and displayed in the list below
- To upload multiple files, simply press 'Ctrl' key and use your left mouse button to select your files.

Creating a CV From a Template

If the uploaded document is a CV, you can create a system CV from that document if you wish.

- Using the drop down menus for an individual Document, you can select a Template, then Create a CV using this template:
- Select your template from the drop down menu
- Select
 - 'Create CV Using Template' (to preview the CV), or
 - 'Create & Save CV Using Template' (to Save the generated CV to the Candidate's Documents)

Reparsing Documents

If you upload a new CV into the document area you can use this CV to update the Candidates file and also include the CV in future searches. Use the icons in the Actions column to reparse the document accordingly:

- The Candidate information held on the database, or
- To include the document in a Boolean search

Deleting a Document

To delete a document, simply click the trash can icon to the right of the individual document.