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# ReServe Portal

*A Step-by-Step Guide for Our Partner Organizations*

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*For additional support, contact us at [info@reserveinc.org](mailto:info@reserveinc.org) or 877-290-6145.*

# Change Your Contact Info

After logging in, you will be directed to your profile page.

All fields can be changed except your email address.

(To change your email address, contact ReServe.)

The screenshot shows the ReServe CRM interface. At the top, there's a navigation bar with links like HOME, ADD STAFF, ORGANIZATION PROFILE, and POSITIONS. A user profile for David Somerset is shown in the top right. Below the navigation bar, a green banner indicates the user is logged in. The main content area is titled 'Organization staff: test David Somerset' and shows the organization as 'Universal Exports'. On the left, there are links for 'My Profile' and 'Change password'. The main section is divided into 'BIO information' and 'Contact Information'. Under 'BIO information', there are input fields for 'First name' (David), 'Last name' (Somerset), and 'Title' (test). Under 'Contact Information', there are fields for 'Work phone', 'Mobile phone' (123-123-1231), and 'Email' (orgtest@orgtest.com). A red box highlights the 'Mobile phone' field, and a dashed line connects it to a detailed view of the field editing process shown in the bottom section.

To edit any field:

1

A text input field containing the number '123-123-1231'. A mouse cursor is clicking on the field.

Click on the field

2

The same text input field with '123-123-1231'. The text is highlighted in blue, and a text cursor is visible. A red 'X' and a green checkmark icon are in the top right corner of the field.

Edit the text

3

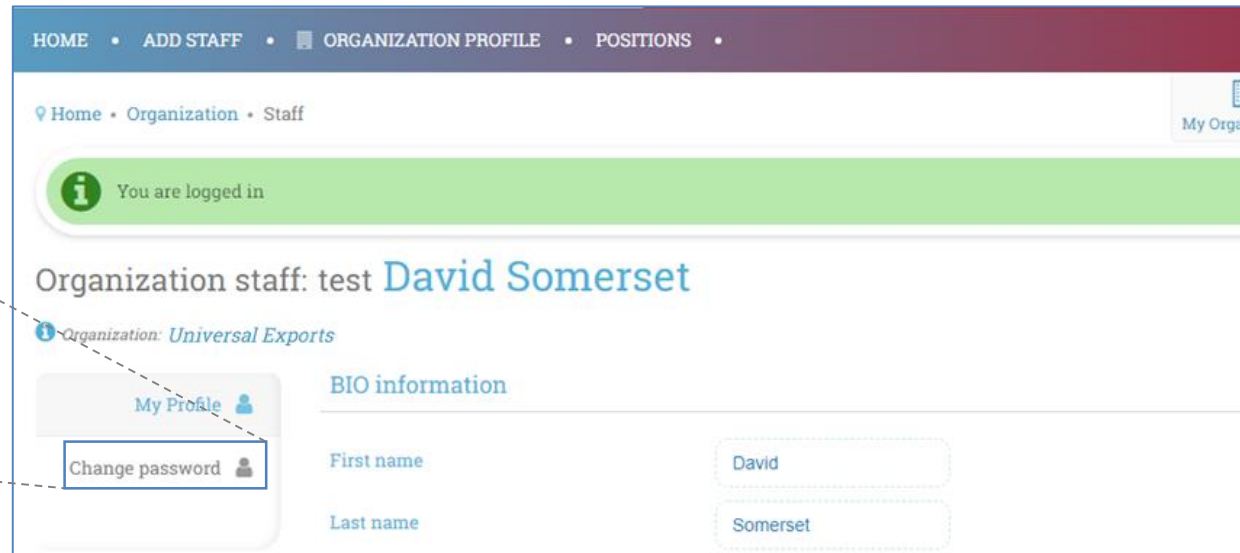
The same text input field with '555-555-5555'. A green checkmark icon is in the top right corner, and a mouse cursor is clicking on it. A red 'X' icon is also present.

Click  to save the change

# Change Your Password

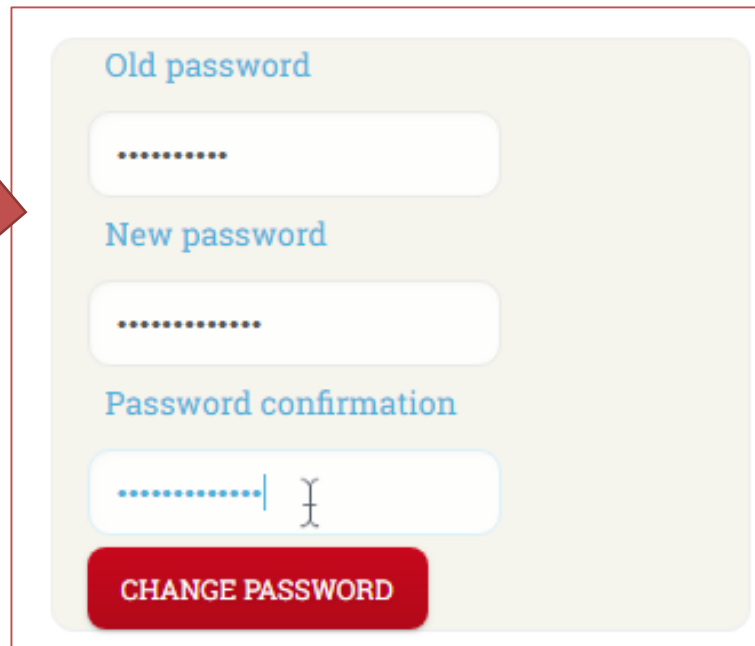
After logging in, you will be directed to your profile page.

① Click **Change password** on the left side of the page.



The screenshot shows a web application interface. At the top is a navigation bar with links: HOME, ADD STAFF, ORGANIZATION PROFILE, and POSITIONS. Below this is a breadcrumb trail: Home > Organization > Staff. A green status bar indicates 'You are logged in'. The main heading is 'Organization staff: test David Somerset'. Below this, it says 'Organization: Universal Exports'. On the left, there is a 'My Profile' section with a 'Change password' button highlighted by a blue box. To the right, there is a 'BIO information' section with input fields for 'First name' (containing 'David') and 'Last name' (containing 'Somerset').

② On the next page, put in your old password, and your new password twice. Then, click **CHANGE PASSWORD** to save the change.



The screenshot shows a password change form. It has three input fields: 'Old password', 'New password', and 'Password confirmation'. Each field contains a series of dots representing masked text. At the bottom of the form is a red button labeled 'CHANGE PASSWORD'. A large red arrow points from the 'Change password' button in the previous screenshot to this form.

# Add a Co-worker to the Portal (1/3)

After logging in, you will be directed to your profile page.

① Click **My Organization** on the right side of the page.

② On the next page, click **Staff** on the left side of the page.

The image shows two screenshots of the ReServe portal interface. The top screenshot is the user's profile page for David Somerset, with a green 'You are logged in' banner. A callout box points to the 'My Organization' button in the top right navigation bar. The bottom screenshot is the 'Organization Profile: Universal Exports' page. A red arrow points from the 'My Organization' button in the top screenshot to this page. On the left side of the bottom screenshot, a callout box points to the 'Staff' button in the sidebar. The main content area of the bottom screenshot shows fields for organization details like name, website, email, and phone, as well as a location section.

David Somerset  
ORGANIZATION STAFF

My Organization Positions Interviews

You are logged in

Organization staff: test David Somerset

Universal Exports

BIO information

First name David

Last name Somerset

Change password

David Somerset  
ORGANIZATION STAFF

My Organization Positions Interviews

Home • Organization

Organization Profile: Universal Exports

About us: 1229 Final Test

Profile

Positions Interviews Current Placements Staff Pending Submissions (1)

Organization name Universal Exports

Website testing.com

Email test@test.com

Phone 555-555-5555

Fax

Location

Address: Mendon Rd 02864 Rhode Island Cumberland

How did you hear about ReServe?

Continued  
in Part 2

# Add a Co-worker to the Portal (2/3)

③ You will see a list of all of the staff that ReServe has in our database for your organization.

At the bottom of the list are two buttons.

Name	Position	Action
John Black	test	
David Somerset	test	
Richard Sterling	test	GRANT ACCESS

< 1 >

INVITE NEW ADD NEW W/O PORTAL ACCESS

④ Click **INVITE NEW** if you want to invite your co-worker to create a password so they can log in to the ReServe Portal.

You will need their name and email address.

OR

④ Click **ADD NEW W/O PORTAL ACCESS** if you want to add your co-worker to our database without inviting them to create a password in the ReServe Portal.

You will need their name, title, email address, work phone, and office address.

Continued  
in Part 3

# Add a Co-worker to the Portal (3/3)

## Send invitation to staff member for Universal Exports

First Name\*

James



Last Name\*

Stock

Email\*

jstock@unitedexports.com

SEND

⑤ If you clicked , fill out the form with your co-worker's name and email address and click . They will receive an email from ReServe with a link they can use to set a password for the ReServe Portal.

# OR

## Organization staff member registration

BIO Information

PRE

James

SR.

Stock

Preferred name

Journalist

Contact Information

555-555-5555

Mobile phone

jstock@universalexports.com

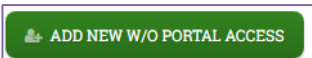
123 Main Street

New York

New York


10001

REGISTER

⑤ If you clicked , fill out the form with your co-worker's information as indicated, then click  to add them to ReServe's database.

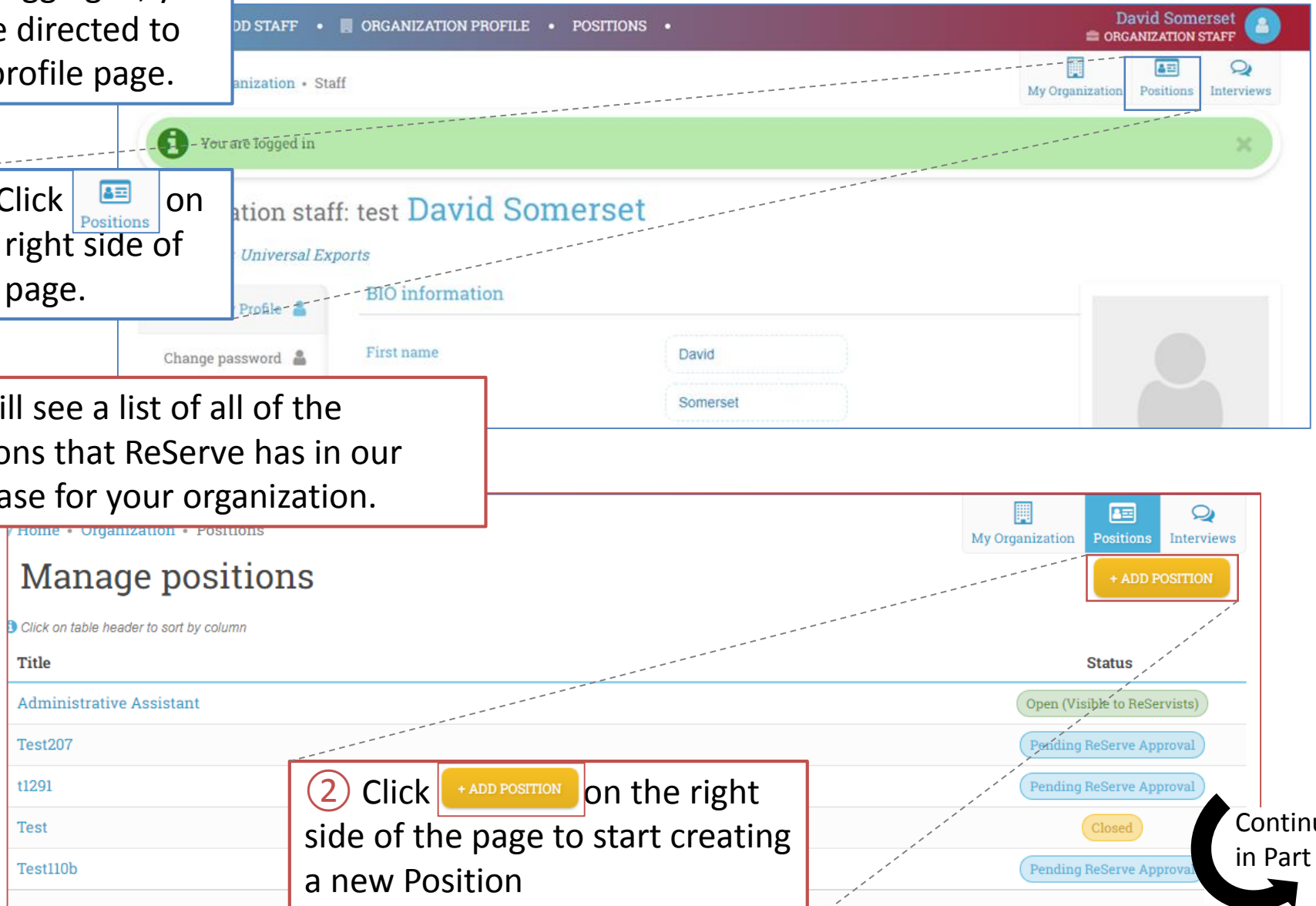
# List a Position with ReServe (1/3)

After logging in, you will be directed to your profile page.

① Click  on the right side of the page.

You will see a list of all of the positions that ReServe has in our database for your organization.

② Click  on the right side of the page to start creating a new Position



The screenshot displays the ReServe user interface. At the top, a navigation bar includes links for 'ADD STAFF', 'ORGANIZATION PROFILE', and 'POSITIONS'. The user 'David Somerset' is logged in, and the 'Positions' tab is selected in the right-hand menu. Below the navigation bar, a green banner indicates the user is logged in. The main content area shows the user's profile information, including the name 'David Somerset' and the organization 'Universal Exports'. A 'BIO information' section is also visible. Below the profile information, there are input fields for 'First name' and 'Last name'. The 'Positions' tab is active, showing a list of positions. The list has columns for 'Title' and 'Status'. The first position listed is 'Administrative Assistant' with a status of 'Open (Visible to ReServists)'. Other positions include 'Test207', 't1291', 'Test', and 'Test110b'. A '+ ADD POSITION' button is located on the right side of the list. A red box highlights this button, and a callout points to it with the instruction: '② Click + ADD POSITION on the right side of the page to start creating a new Position'. Another red box highlights the 'Positions' tab in the right-hand menu, with a callout pointing to it: '① Click Positions on the right side of the page.'



Title	Status
Administrative Assistant	Open (Visible to ReServists)
Test207	Pending ReServe Approval
t1291	Pending ReServe Approval
Test	Closed
Test110b	Pending ReServe Approval

Continued  
in Part 2



# List a Position with ReServe (2/3)

③ You will be taken to the “create new Position” form. Required fields are marked with \*.

Some sections have the  symbol. Clicking this allows you to create more space in the job for additional requirements. The  symbol allows you to remove the extra space you have added.

Create new Position Pending

Please complete the following information about the Position you would like to fill with ReServe. Once you submit the Position, ReServe will review it. During this time, ReServe may reach out if additional information is needed. Once ReServe approves the Position, we will begin the searching for ideal ReServists to refer to you.

### Basic Info

Position Title\*

Department

Expected Duration (months) Expected Hours / Week

Expected Indefinite Duration (or over 2 years)

### Location of position

Work-site: Street Address\*

Work-site: City\*

-- State\* --

Work-site: ZIP\*

☐ Work from Home

Nearby Public Transit Options (if any)

☐ Parking Available

### Description\*

Using 300 characters or less, provide a short description of the Position, including what the Position will entail day-to-day. This description will be the first sense ReServists have of your Position.

Quick Description\* (300 char)

Describe the workplace culture.

Workplace Culture\*

-- Dress Code\* --

### Education

Indicate the minimum level of education the ReServist must have.

If there is a specific degree the Position requires (such as an MBA or MSW), please list it here.

### Skill Requirements\*

Choose which of the following skills the ReServist will need in this Position. If you would like, you may also indicate the minimum number of years of experience the ReServist should have.

[Add skill](#)

# List a Position with ReServe (3/3)

④ The last step is to choose the Designated Staff Contacts for this position. You can choose from among the organization staff who are already in the ReServe database, or you can click [Add Staff](#) to add a new person to the database. You will need their name, title, email address, work phone, and office address.

## Designated Staff Contacts

[Add Staff](#)

*Contact information from the Primary and Secondary Supervisors will be shared with the Employer of Record, NextSource, and it will be the Supervisors' responsibility to approve ReServist timesheets. If someone besides the Primary Supervisor is reviewing candidates, please designate them as the 'Other Resume Approver'.*

Primary Supervisor\*

Secondary Supervisor\*

Other Resume Approver:

-- Choose Primary Supervisor --

-- Choose Secondary Supervisor --

-- Choose Other Resume Approver --

⑤ Once all information about the Position has been completed, click [CREATE POSITION](#) at the bottom of the page.

[CREATE POSITION](#)


When your position is submitted to ReServe, you will be taken to the position page and you will see this message:

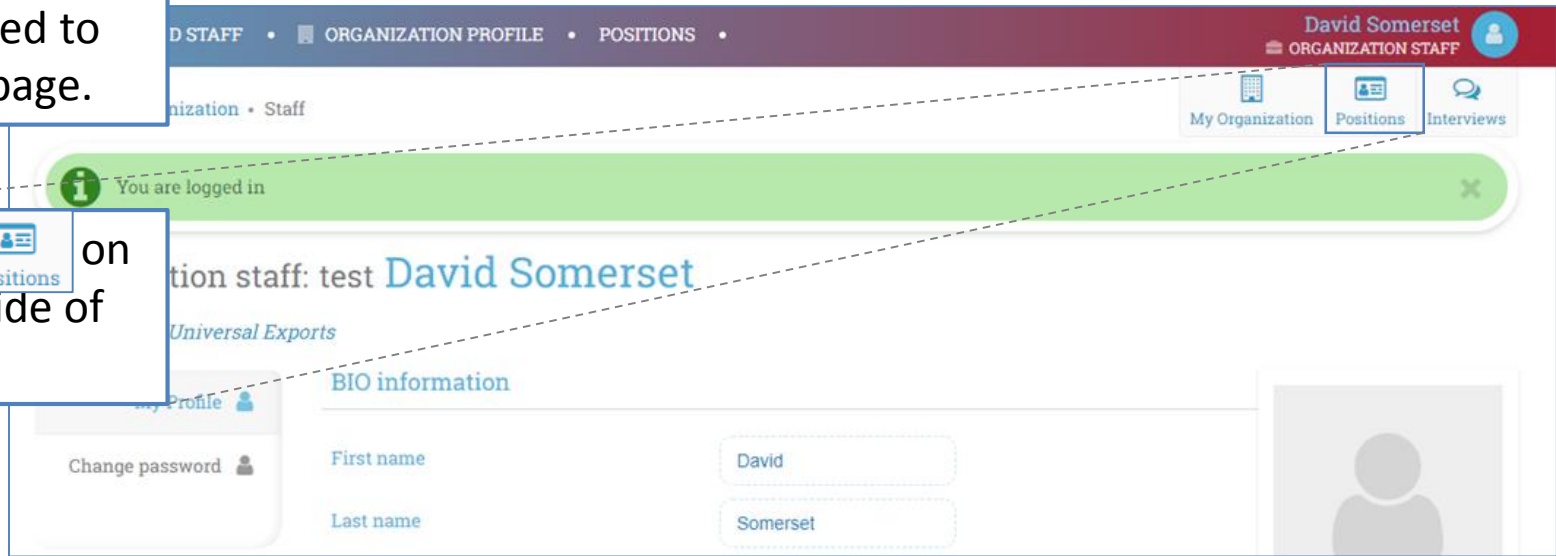
 Position saved. Wait for approval.

ReServe will review your position; you will be alerted if we choose to open your position and begin searching for a placement.

# Edit a Position with ReServe (1/2)

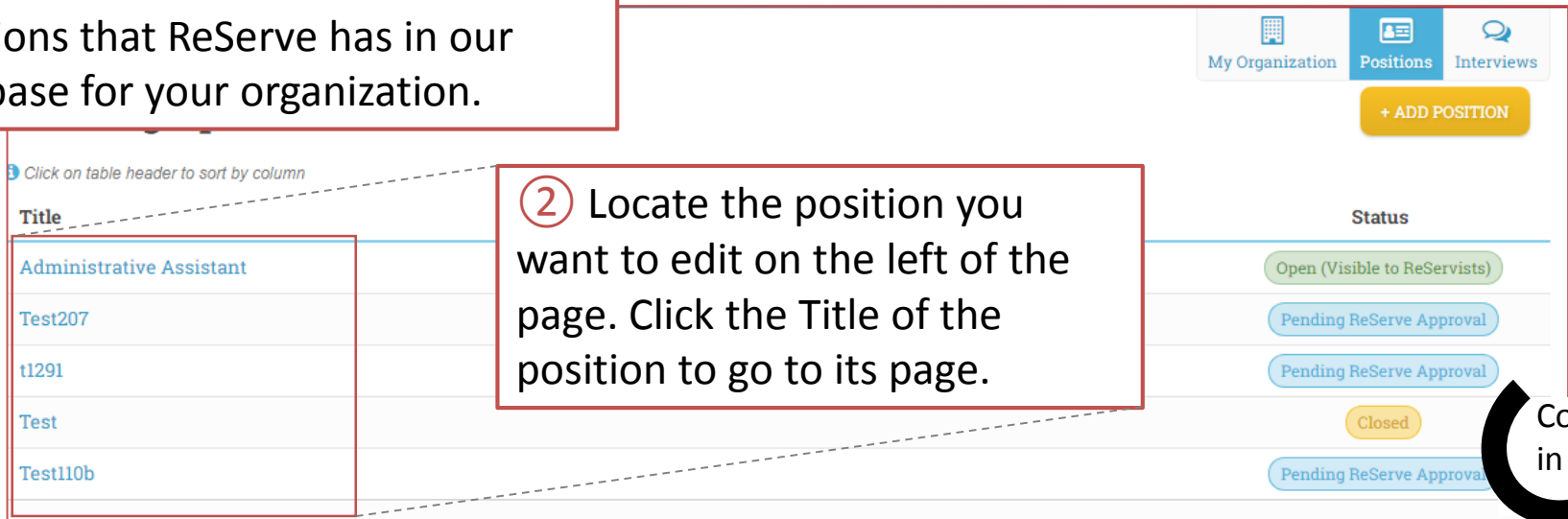
After logging in, you will be directed to your profile page.

① Click  on the right side of the page.



You will see a list of all of the positions that ReServe has in our database for your organization.

② Locate the position you want to edit on the left of the page. Click the Title of the position to go to its page.



Continued  
in Part 2

# Edit a Position with ReServe (2/2)

③ From the Position page, click **EDIT** to edit the position details.

Home • Organization • Positions • 8670

## Position: Administrative Assistant (Id: 8670)

Department: test  
Organization: Universal Exports

Information  
Submission  
Interview

10 Expected hours per week  
10 Expected Duration (months)

Work from home

Description  
t  
Workplace Culture: t

Open (Visible to ReServists)  
**EDIT**

## Edit position Position

### Basic Info

Administrative Assistant

test

### Description

t

Location of position


Work from Home

④ Replace the existing information to edit the position. Once you are finished, click **UPDATE POSITION** at the bottom of the page.


ReServe will review your position; you will be alerted if we choose to open your position and begin searching for a placement.

# Review Reservists (Resumes) (1/4)

After logging in, you will be directed to your profile page.

① Click  on the right side of the page.



② On the next page, click  on the left side of the page



This screenshot shows the 'Organization Profile: Universal Exports' page. The left sidebar contains a 'Profile' tab and a 'Pending Submissions (1)' link. The main content area displays the organization's details:

Field	Value
Organization name	Universal Exports
Website	testing.com
Email	test@test.com
Phone	555-555-5555
Fax	
Number of Employees	50-200

Additional information on the right includes the location: Mendon Rd, 02864, Rhode Island, Cumberland. A section titled 'How did you hear about' is partially visible at the bottom.

Continued  
in Part 2

# Review Reservists (Resumes) (2/4)

## Organization Profile: Universal Exports

About us: 1229 Final Test

Profile

Positions

Interviews

Current Placements

Staff

Pending Submissions (2)

### Pending submissions for position

Administrative Assistant

HR Consultant

③ Next, select your position from the list that appears.

## Position: Administrative Assistant (Id: 8670)

Open (Visible to ReServists)

EDIT



Department: test

Organization: Universal Exports

Information

Submission

Interview

### Submission list

Please check all submission users before sending to ReServe Staff

Primary supervisor:  
David Somerset

Jean A. -

NEED ACTION

submitted on: 05/29/2018 1:37 pm

Download resume

Martin K. -

NEED ACTION

submitted on: 05/29/2018 1:37 pm

Download resume

< 1 >

You must respond to all ReServists before you can submit your responses back to ReServe

SAVE PROGRESS

SUBMIT TO RESERVE

④ You will see a list of candidates. To start, click NEED ACTION for the first candidate.

Continued  
in Part 3

# Review Reservists (Resumes) (3/4)

⑤ Review the credentials of the ReServist candidate here

You can download the resume here

Information ⓘ

Submission 🧑

Interview 💬

### Submission list

ⓘ Please check all submission users before sending to ReServe Staff

Jimmy B. - **NEED ACTION** submitted on: 05/29/2018 1:37 pm

Primary supervisor: David Somerset

[Download resume](#)

#### Top 5 skills

- 1 - Sales 0 years 2 month(s)
- 2 - Retail 0 years 1 month(s)

#### Software skills

#### Education

- Communications (Manchester University)

#### Licenses

- License A

#### Languages

### Upcoming Availabilities (for Interview)

ⓘ Please check dates for interview:

Friday 06/01	Monday 06/04	Tuesday 06/05	Wednesday 06/06	Thursday 06/07
<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning
<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon

**NOT INTERESTED**

**INTERESTED**

### Comments \*

Please leave some comments about your decision \*

[Download resume](#)

< 1 >

ⓘ You must respond to all ReServists before you can submit your responses back to ReServe

**SAVE PROGRESS** **SUBMIT RESPONSE**

Continued  
in Part 4

# Review Reservists (Resumes) (4/4)

⑥ After you have reviewed the ReServist, provide your response:

① (Optional) Indicate times you are available for an interview

② Leave a comment

③ Mark if you are *Not Interested* or *Interested*

⑦ Once you have responded to *all* of the ReServists, click **SUBMIT TO RESERVE** to send your results back to ReServe. ReServe will contact you about the next step in the process.

Primary supervisor: David Somerset

ReServe Staff

Submission Interview

Jimmy B. - **NEED ACTION** submitted on: 05/29/2018 1:37 pm [Download resume](#)

**Top 5 skills**

- 1 - Sales 0 years 2 month(s)
- 2 - Retail 0 years 1 month(s)

**Software skills**

**Education**

- Communications (Manchester University)

**Licenses**

- License A

**Languages**

Please check dates for interview:

Friday 06/01	Monday 06/04	Tuesday 06/05	Wednesday 06/06	Thursday 06/07
<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning	<input type="checkbox"/> Morning
<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon	<input type="checkbox"/> Afternoon

**Comments \***

Please leave some comments about your decision \*

**NOT INTERESTED** **INTERESTED**

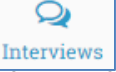
Meredith K. - **NEED ACTION** submitted on: 05/29/2018 1:37 pm [Download resume](#)

**SUBMIT TO RESERVE** **SAVE PROGRESS** **SUBMIT TO RESERVE**



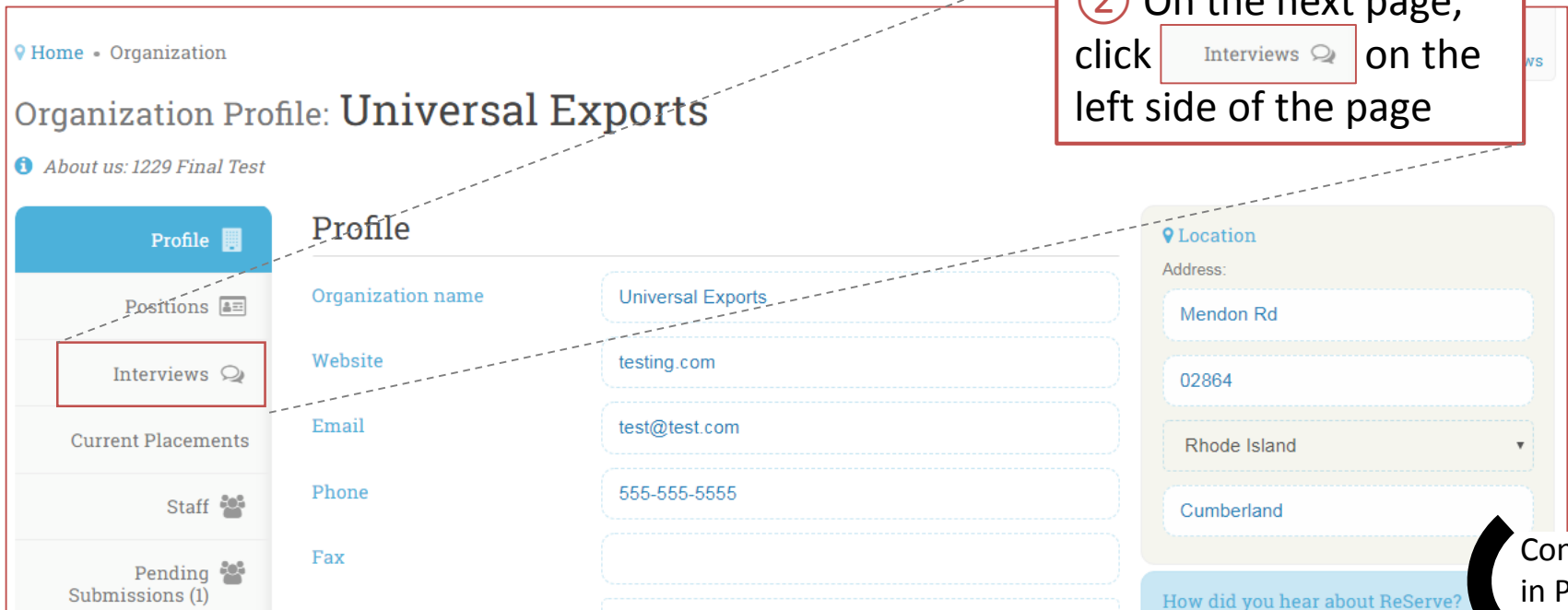
# Provide Interview Feedback (1/3)

After logging in, you will be directed to your profile page.

① Click  on the right side of the page.




② On the next page, click  on the left side of the page



Continued  
in Part 2

# Provide Interview Feedback (2/3)

## Organization Profile: Universal Exports

 About us: 1229 Final Test

Profile 

Interviews


Upcoming

Recent

③ To view a list of interviews that were scheduled in the past, click **Recent** on the right side of the page.

--- Empty list ---  
There's no items in this area

## Organization Profile: Universal Exports

 About us: 1229 Final Test

Profile 

Positions 

Interviews 

Current Placements

Interviews

Upcoming

Recent

30  
May

10:05  
AM

Meredith K.  
13 Main Street  
New York, NC

overdue but not reacted



REACT!




02  
May

2:20  
PM

Applicant new T.  
123 Main Street  
New York, NC

overdue but not reacted

 Remember to ask  
about PowerPoint  
experience

REACT!



conducted and reacted



④ Locate the Interview you wish to provide feedback for, and click **REACT!**

Continued  
in Part 3

# Provide Interview Feedback (3/3)

⑤ In the pop-up window, use the drop-down options to indicate your rating of the ReServist in each of these areas.

The screenshot shows a form titled 'Interview result' with two tabs: 'Interview Happened' (selected) and 'Interview Did Not Happen'. Under the 'Interview Happened' tab, there is a section 'If Interview Happened' containing six drop-down menus for rating: Work Experience, Licenses / Certification, Software Skills, Languages Spoken, Education, and Level of Professionalism. To the right of these is a 'Comments' text area. Further right is a 'Ready to hire?' section with radio buttons for 'No' and 'Yes', and a red 'SEND RESULT' button. A callout box points to the 'Ready to hire?' section, explaining the options and the 'SEND RESULT' button.

Interview result

✓ Interview Happened ✗ Interview Did Not Happen

If Interview Happened

-- Work Experience -- ▾ -- Licenses / Certificat ▾

-- Software Skills -- ▾ -- Languages Spoke ▾

-- Education -- ▾ -- Level of Professio ▾

Comments

Ready to hire?

☐ ✗ No ☐ ✓ Yes

SEND RESULT

Then, indicate if you would like to hire the ReServist by clicking ☐ ✗ No or ☐ ✓ Yes. Then, click  to send your feedback.

ReServe will consider your feedback. If you indicated ☐ ✓ Yes, we will reach out to set a Start Date.

OR

The screenshot shows the same 'Interview result' form, but with the 'Interview Did Not Happen' tab selected. Under this tab, there is a section 'If Interview Not Happened' with a text input field labeled 'Type here a reason'. At the bottom right is a green 'SEND' button. A callout box explains the steps for this scenario.

Interview result

✓ Interview Happened ✗ Interview Did Not Happen

If Interview **Not** Happened

Type here a reason

SEND

⑤ If the interview did not happen, click , type a reason into the comment box, and click  to tell ReServe.