



6. |

CREATING REPORTS FROM RESUMATE RECORDS

RESUMate is incredibly easy to use...I wish I had bought it years ago.

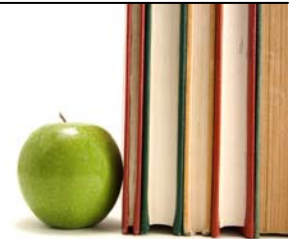
(Houston, Texas)

INTRODUCTION:

The word “reports” can describe many different kinds of documents. Here is a list of some reports you can easily create using RESUMate.

1. A list of records, showing selected pieces of data from the RESUMate screen
2. An Excel spreadsheet, in which columns in the spreadsheet correspond to field names and Classification Table columns
3. A call list of names and phone numbers
4. A list of active jobs and the people interviewing on those jobs
5. A “print screen,” or functional list of all of the data contained in a record
6. Lists of candidates submitted or being interviewed in a time period (*lists organized by some standard recruiting function*)

All of these reports are easily created using RESUMate, or in some cases, the RESUMate Manager report writing program.



Lunch & Learn Seminars:

Online seminars are offered daily at Noon, Eastern time, USA. Twelve topics are offered in three series:

- the Basic Series..... 1-4
- the Advanced Series** 5-8
- the Recruiter’s Tool Kit..... 9-12


Topic List for Seminar 6:

- 6.1 It’s easy to print customized lists of data from the candidate, client, and job order screens in RESUMate.
- 6.2 21 pre-loaded report formats are also easily accessed from an icon on the tool bar.
- 6.3 Data from RESUMate is easily exported to Excel to create reports that require computation.
- 6.4 The Daily Planner includes a fast and convenient, one-click “Pipeline Report.”
- 6.5 The Daily Planner screen is also a good starting point for printing daily call lists.
- 6.6 RESUMate Manager is a companion report writing program for the Pro version of RESUMate.



did you know?

The record on your screen is in the "Active Window":

Whenever you see a record in RESUMate, a count is displayed in the upper left corner of the screen. This count may indicate all of the records in your database, or a search result count, or a count of records linked to a job order, or contact records linked to a client. When you **click the list icon**,  the number of rows in the list will correspond to the number of records in this **Active Window**.



tip #1


Where are the telephone numbers?

The list created from the list icon includes name and address fields, date fields and text fields. *It does not include the telephone numbers.* You can print lists of phone numbers, as will be shown later in this document, but not from the list icon starting point.

If you'd like to see phone numbers for any candidate in the list, highlight any line, and then **click the Telephone List button** on the right-hand side of the **List dialog box**.

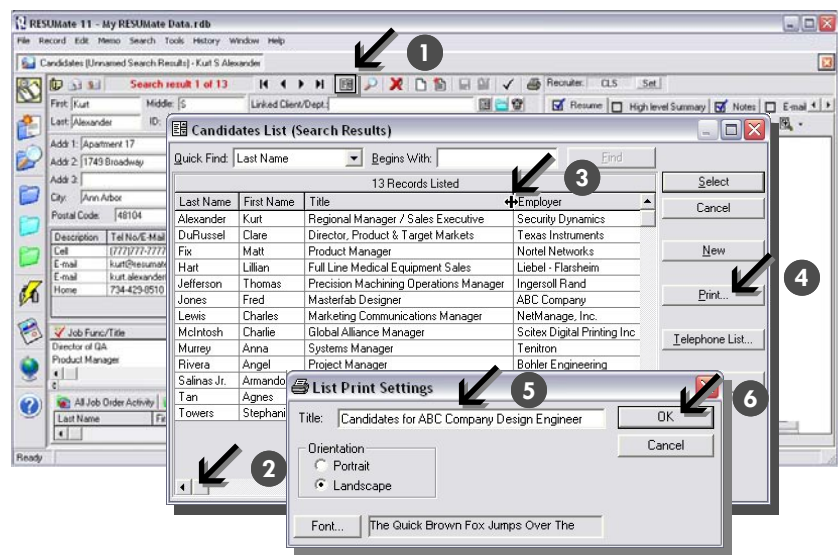
6.1 | IT'S EASY TO PRINT CUSTOMIZED LISTS OF DATA FROM THE CANDIDATE, CLIENT, AND JOB ORDER SCREENS IN RESUMATE.

Often a report is nothing more than a list, and RESUMate includes a very simple list printing function. For example, it is easy to print a list of all candidates currently being interviewed on an active job.

Start by clicking the **list icon**  at the top of the active window, to the immediate right of the black arrow keys (FIGURE 6.1, 1). A list will appear of all of the records in the **Active Window**. The count at the top of the list will match the record count displayed in the upper left corner of the **Active Window**.

The column titles at the top of the list correspond to the field names in the database record itself. You will need to use the slide bar at the bottom of the list (FIGURE 6.1, 2) to scroll to the right in order to see all the columns that are contained in the list.

FIGURE 6.1 PRINTING FROM THE LIST ICON



Point to any column title to drag any column to the left or right, until the column titles that you wish to include in the report are visible on the screen. You can also control the column width by moving the vertical bar that separates the column titles (FIGURE 6.1, 3). When all of the columns to be included in the report can be seen on the screen, click the **Print button** (FIGURE 6.1, 4).

In the following dialog box, give the report a title (FIGURE 6.1, 5), and then choose **Portrait** or **Landscape**. Obviously, choosing **Landscape** will cause more columns to appear on the page. Click **OK** to see a print preview screen (FIGURE 6.1, 6).

To create a printed report, click the **printer icon** at the top of the preview screen. To create a PDF file that can be attached to an e-mail, choose the **Save as PDF...** icon.



did you know?

Where are my print format files?

If RESUMate was first installed as a single user installation, a folder called **Reports** was created as a sub-folder under **RESUMate**, itself a sub-folder under **My Documents**.

If you don't see the report titles when the **Select Print Format File dialog box** appears, you may need to browse to the server location to find this folder.



tip #2


For presentation quality reports, use RESUMate Manager.

The printed reports described on this page cover a wide range of functional documents, but are not designed to be attractive on the page, or “**presentation quality**” in appearance.

RESUMate Manager, described on the final page of this document, creates reports that by both subject matter and design, are intended for staff meeting purposes and distribution to clients.

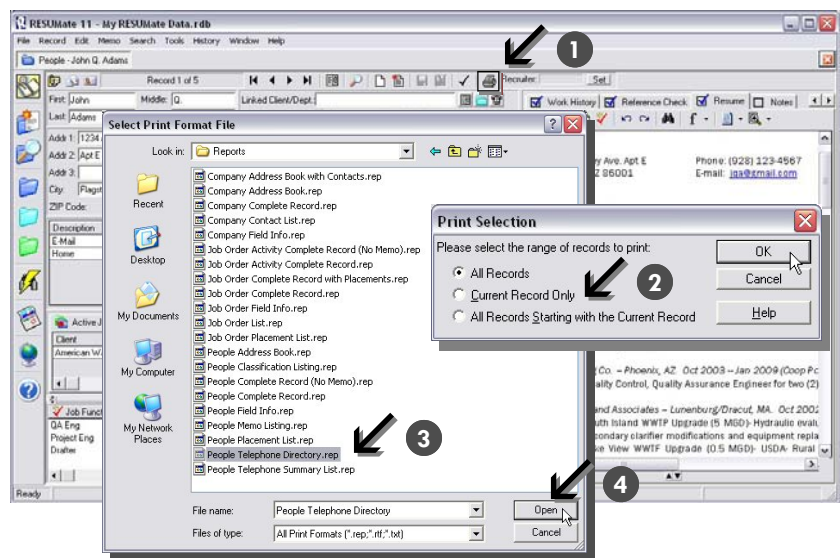
6.2 | 21 PRE-LOADED REPORT FORMATS ARE ALSO EASILY ACCESSED FROM AN ICON ON THE TOOL BAR.

A number of standard report formats have been pre-loaded into RESUMate. These formats allow you to print either the entire record that you see on your screen, or selected information from the record.

Start by clicking the **printer icon**  in the horizontal tool bar at the top of the screen. (FIGURE 6.2, 1). Next, choose the “range” of records to be printed, which in practice means either the single record that you see on your screen, or all records in the **Active Window**. Make your choice (FIGURE 6.2, 2) and click OK.

The next dialog box is titled **Select Print Format File**. Here you will see report titles that correspond to the three main record types: **People**, **Company**, and **Job Order**.

FIGURE 6.2 PRINTING FROM THE PRINTER ICON



The report titles give a clear indication of what will be included in the report. For example, **People Complete Record** will print the entire content of the record you see on your screen, including the complete content of any Memo titles that are part of this record.

Here you'll also find two report formats designed to print candidate phone numbers: **People Telephone Directory** (FIGURE 6.2, 3), and **People Telephone Summary List**. The Summary List format is more compact: all of the phone numbers for each person are printed on a single line, as in a spreadsheet. Click **Open** to see a print preview screen (FIGURE 6.2, 4).

To create a printed report, click the **printer icon** at the top of the preview screen. To create a PDF file that can be attached to an e-mail, choose the **Save as PDF...** icon.

6.3 | DATA FROM RESUMATE IS EASILY EXPORTED TO EXCEL TO CREATE REPORTS THAT REQUIRE COMPUTATION.

Excel spreadsheets make good reports, and data from RESUMate is easily exported into a spreadsheet file format.

For example, you can easily export names and phone numbers to Excel to create a **call list**. You can export Classification Table data, along with names and dates, to create an **EEO compliance report**. Finally, you can export job order date information, such as date received and date filled, to do a computation in Excel of the average number of days required to fill an order.

To start printing a report using RESUMate data in Excel, click **File | Database | Tools | Export Wizard** (FIGURE 6.3, ❶). On the opening two screens in the Wizard, choose **Excel** as the file type on the first screen, and then **Direct to Excel** on the second screen.



did you know?

The report in Excel comes from the Active Window:

The data being sent to the Excel spreadsheet will come from the **Active Window**. The Active window (i.e. **what you see on your screen when you start the export process**) can be the entire database file, a search result, contacts linked to a client, or candidates linked to a job.

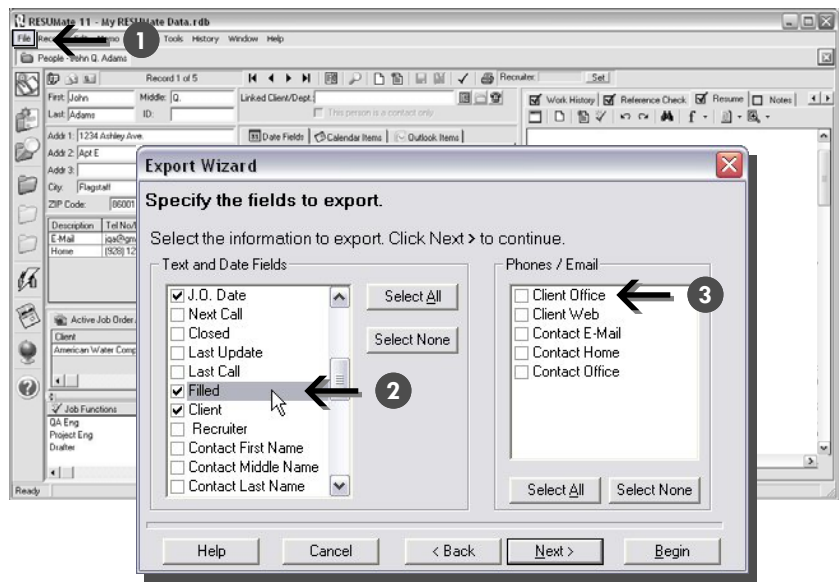


tip #3

Need more help with this topic?

Seminar 5: Importing and Exporting in RESUMate provides a complete description of each dialog box in the Export Wizard. For additional help with this topic, **see pages 7-9** of the Seminar 5 document.

FIGURE 6.3 CREATING EXCEL REPORTS FROM RESUMATE



On the next screen, choose the **field names** (FIGURE 6.3, ❷) and any **phone number fields** (FIGURE 6.3, ❸) that you would like to see as column titles in the resulting Excel spreadsheet.


On the following screen, you can also select any Classification Table columns you would like to see included in the spreadsheet. The primary purpose for including Classification Table data is the creation of **EEO compliance reports**, so unless this is the report you are creating, you will likely skip over this screen.

The remaining screens in the Export Wizard are easily understood from the on-screen instructions, and when you have finished with the last Wizard screen, your report will open automatically in Excel.

6.4 | THE DAILY PLANNER INCLUDES A FAST AND CONVENIENT, ONE-CLICK “PIPELINE REPORT.”

An important report for any recruiter is a list of active jobs and the people being interviewed on those jobs, commonly called a **Pipeline Report**.

Below is a summary of the customization settings that will result in the creation of a one-click **Pipeline Report**. (*Detailed instructions on using RESUMate’s Daily Planner can be found in the documentation for Seminar 7.*)

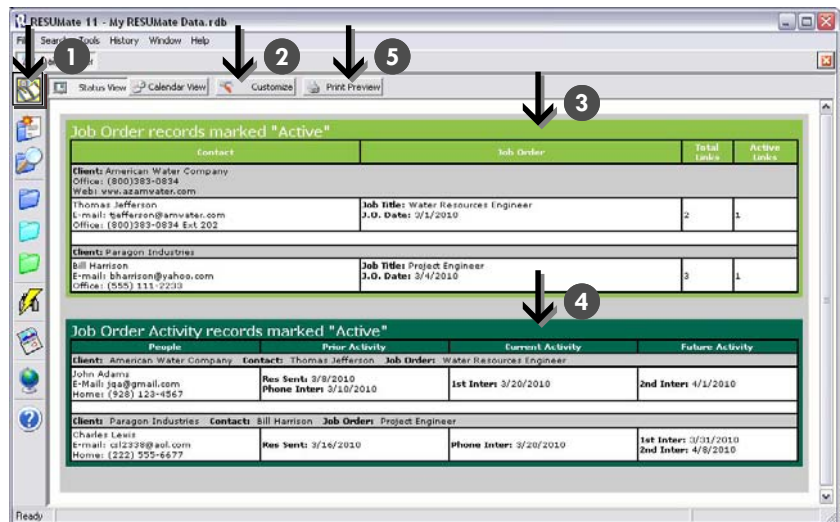
To begin, click the **Daily Plan** icon  in the upper left corner of the screen (FIGURE 6.4, ❶). Next, click the **Customize** button at the top of screen (FIGURE 6.4, ❷) to open up the **Customize Daily Planner** dialog box.



What’s in your Pipeline?

Whether you’re an independent recruiter or an HR person recruiting for your own company, it’s critical to have at your fingertips detailed information about the jobs you’re spending time trying to fill, as well as interview details about the candidates who are in various stages of being interviewed for those jobs. **The Daily Planner** gives you all of this with a single click.

FIGURE 6.4 THE DAILY PLANNER: “PIPELINE REPORT”



- ⇒ On the Status View tab: Check the 2 boxes labeled **Active Job Orders** and **Active Job Order Activity**. Uncheck all of the other boxes on this tab.
- ⇒ On the Tracking Dates tab: In the lower left corner, place a check mark next to all 6 date fields in the **Job Order Window**. In the lower right corner, place a check mark next to all 6 date fields in the **Job Order Activity Window**.
- ⇒ On the General tab: If it is checked, uncheck the box labeled **Filter by Recruiter**.

Click the **Save** button, and the **Status View** of the Daily Planner screen will appear. The top portion of the screen will list details of all **Active Jobs** (FIGURE 6.4, ❸), and the following section will list all **Active Candidates** (FIGURE 6.4, ❹) who are still under consideration for those jobs.

Click the **Print Preview** button (FIGURE 6.4, ❺) at the top of the screen to send the report to the printer, or to save it as a PDF file to be attached to an e-mail message.



tip #4

Smart date field names make call lists easy:

It's helpful to name date fields in the Candidate screen with labels such as **Marketing Call**, **Recruiting Call**, and **Follow-Up Call**. Then, in the normal course of using RESUMate, individual records can be marked with dates in these fields.

For a complete description on how to custom-name your date fields, see page 6 (Section 2.5) of Seminar 2: Customizing RESUMate for Maximum Productivity.



tip #5

Mark multiple records in a single action:

Use the **Global Editor** in **File | Database | Tools | Global Editing**, to set a date in all the records found in a search. For example, you can do a search to find all candidates qualified for a particular position, then use the Global Editor to set a Follow-Up date for all the records found in that search.

For more information, see page 3 (Section 7.2) of Seminar 7: Creating a Daily Plan from RESUMate.

6.5 | THE DAILY PLANNER IS ALSO A GOOD STARTING POINT FOR PRINTING DAILY CALL LISTS.

Starting the day with a list of **recruiting calls**, **marketing calls**, and **follow up calls** is an important practice for many recruiters. The Daily Planner can use dates found in any of RESUMate's **date fields** to create both on-screen and printed call lists with just a few clicks.

Below is a summary of the customization settings that will result in the creation of a **Daily Call List**. (*Detailed instructions on using RESUMate's Daily Planner can be found in the documentation for Seminar 7*).


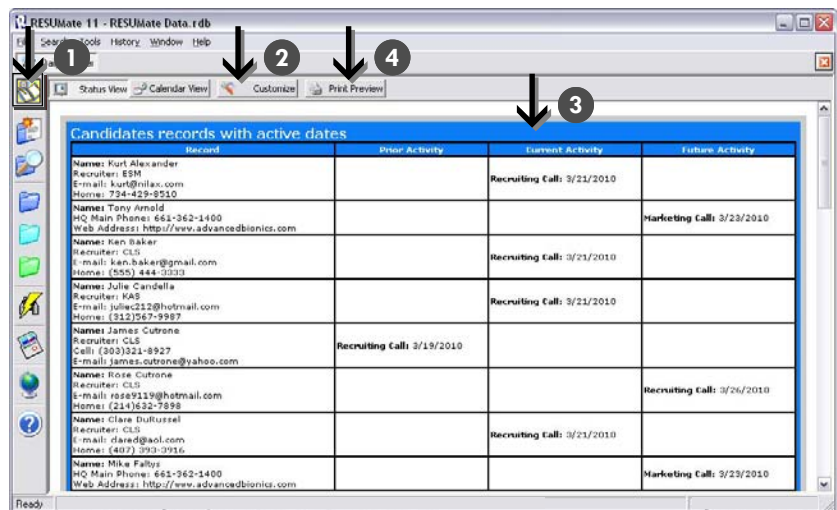
To begin, click the **Daily Plan** icon  in the upper left corner of the screen (FIGURE 6.5, 1). Next, click the **Customize** button at the top of screen (FIGURE 6.5, 2) to open up the **Customize Daily Planner** dialog box.

FIGURE 6.5 THE DAILY PLANNER: CALL LISTS



- ⇒ On the Status View tab: Check the top box in the section called **Records with Active Dates**. Uncheck all of the other boxes on this tab.
- ⇒ On the Tracking Dates tab: In the upper left corner, place a check mark next to all 6 date fields in the **Candidate** (or **People**) **Window**.
- ⇒ On the General tab: If it is checked, uncheck the box labeled **Filter by Recruiter**.

Click the **Save** button, and the **Status View** of the Daily Planner screen will appear, displaying a list of all Candidate records with selected date fields that occur up to 30 days ago (**Prior Activity** column), today (**Current Activity** column), or up to 30 days in the future (**Future Activity** column) (FIGURE 6.5, 3).

Click the **Print Preview** button (FIGURE 6.5, 4) at the top of the screen to send the report to the printer, or to save it as a PDF file to be attached to an e-mail message.



did you know?

RESUMate Manager is an optional program.

RESUMate Manager is not included as part of the main program. It's an **inexpensive add-on**, that can be purchased at any time from the **Order page** at the RESUMate website. Although it's a separate program, Manager immediately reflects data as it is entered into the RESUMate database.



tip #6

For more information on RESUMate Manager...

RESUMate Manager is described in detail in the **RESUMate Manager Getting Started Guide** which can be downloaded from the **Documents page** at the RESUMate website.

We have included a brief overview of the program here, since the topic of this seminar, **Creating Reports from RESUMate Records** would be incomplete without mentioning this report writing tool.

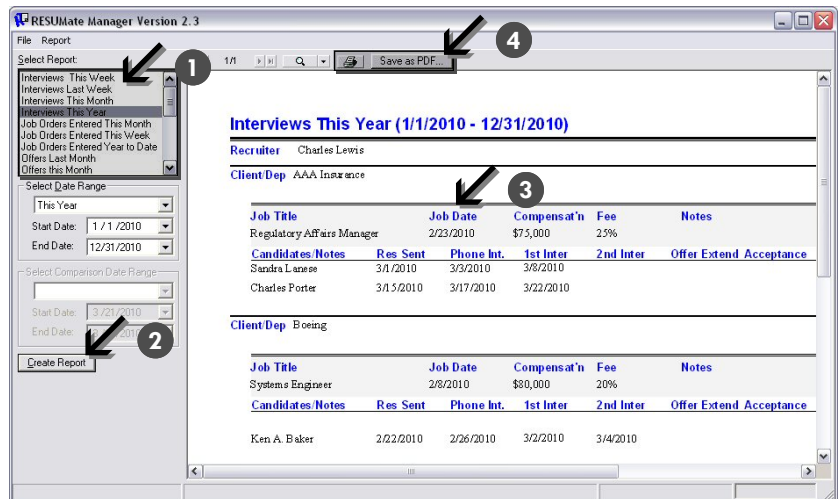
6.6 | RESUMATE MANAGER IS A COMPANION REPORT WRITING PROGRAM FOR THE PRO VERSION OF RESUMATE.

RESUMate Manager is a separate program that organizes data from your RESUMate database into a variety of pre-formatted, presentation-quality report formats. You can also use RESUMate Manager to create reports of your own choosing, although with some restrictions.

The upper left corner of the RESUMate Manager screen displays a list of 21 pre-set, commonly used reports (FIGURE 6.6, ❶). Examples are Interviews this Week (or This Month or Year, or Last Month or Year), Job Orders Entered Year to Date, and Offers This Month.

There is also a Status Report (similar in content to the Status Report that can be printed from the Daily Planner), plus a Summary Report that lists Year to Date and Comparison Period productivity statistics for each recruiter using a network version of RESUMate.

FIGURE 6.6 1 OF 20 STANDARD RESUMATE MANAGER REPORTS



Simply select a report title from the list (FIGURE 6.6, ❶), and then click the **Create Report** button in the lower left section of the screen (FIGURE 6.6, ❷). The column titles on the reports are taken directly from the **field names** in the RESUMate record (FIGURE 6.6, ❸).

You can print the report that you see on your screen, or save it as a PDF file to be attached to an e-mail message (FIGURE 6.6, ❹).