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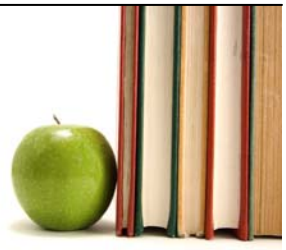
5. |

IMPORTING AND EXPORTING IN RESUMATE



RESUMate is the best investment I have made in the nine years I've been recruiting.

(St. Louis, Missouri)

INTRODUCTION:

It's easy to create records in RESUMate starting from a spreadsheet file, such as an Excel file, or any other "industry standard" file format.

RESU*Mate's* Import Wizard allows you to "map" the column titles in a spreadsheet either to specific field locations, or to a Memo attachment in the database record.

It's also easy to create a spreadsheet file, starting from records in RESUMate.

When creating a spreadsheet from RESU*Mate*, the date and text field labels in the database record, and also the column titles from the Classification Table, can be designated to become column titles in the Excel file.

(You can also create a Microsoft Access file or another RESU*Mate* database file starting from records in your current database).

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 5:

5.1 **Importing Records:** A spreadsheet is the most common starting point.

5.2 The Import Wizard "maps" column titles from the spreadsheet into field locations in the record.

5.3 Every row in the spreadsheet becomes one record (person, company, or job) in RESUMate.

5.4 **Exporting Records:** RESUMate field names and Classification titles can become columns in a spreadsheet.

5.5 The Export Wizard "maps" RESUMate fields into Excel, Access, Outlook's Contacts, or another RESUMate database file.

5.6 Every record in RESUMate (person, company, or job) becomes one row in the spreadsheet.

5.1 | IMPORTING RECORDS: A SPREADSHEET IS THE MOST COMMON STARTING POINT.

Any industry standard file format can be used to create database records in RESU*Mate*. Acceptable file formats are Microsoft Access files, dBase files, and FoxPro files, but the most common starting point for an Import process is a Microsoft Excel file. If you can open a file in Excel, it can easily be imported into RESU*Mate*.

The "native" file format for an Excel file has the file extension **.xls**. Files in this format can have multiple sheets, which makes them unsuitable for importing.

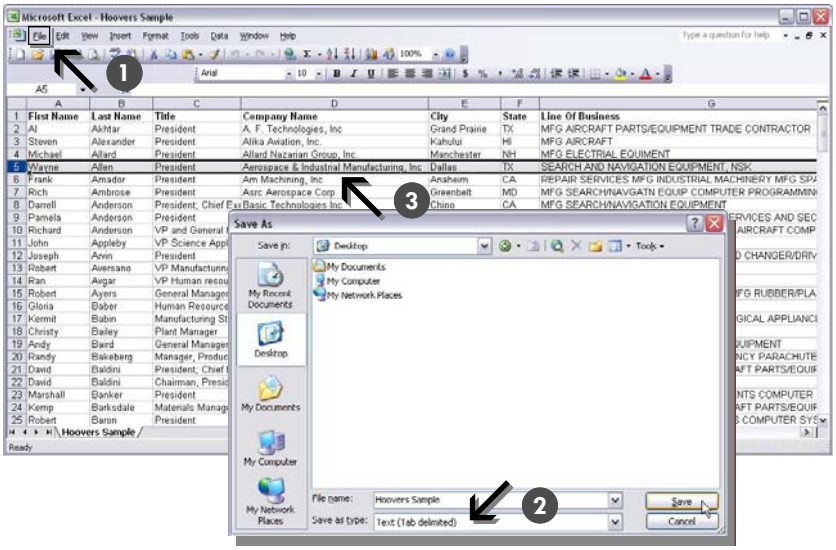
Before a spreadsheet file can be imported, it must first be converted to either a comma delimited or a tab delimited format. With the file open in Excel, click **File | Save As** (FIGURE 5.1, ❶). At the bottom of the dialog box, change the file type to either the **Text (tab delimited)** or **CSV (comma delimited)** file format (FIGURE 5.1, ❷). If the data inside any of the cells in the spreadsheet might contain commas, then choose the tab delimited format.

tip #1

It's safe to ignore Excel's warning message:

When you do the **File | Save As** function in Excel to change the file format from **.xls** to either **.csv** or **ASCII tab-delimited**, you'll see a warning message that says these file types do not support multiple sheets. You can say OK to this message because all of the records in a directory type spreadsheet are contained on a single sheet. Just **click OK** and continue.

FIGURE 5.1 TYPICAL DIRECTORY SPREADSHEET IN EXCEL



Typically, each row in the spreadsheet will become one record in the RESU*Mate* database (FIGURE 5.1, ❸).

A recent feature added to RESU*Mate* 11, however, offers an important exception to this rule. For directory listings such as the one shown above, a single import will create both a **Company record** as well as one **linked Contact person record** for each row in the spreadsheet. Even though the same company name may appear in multiple rows, only one record will be created for the company, and a linked contact person record will be created for each row in which this company name appears.

5.2 | THE IMPORT WIZARD "MAPS" COLUMN TITLES FROM THE SPREADSHEET INTO FIELD LOCATIONS IN THE RECORD.

▽ tip #2

Take your time with the dialog box shown here:

Importing records takes very little time—you can complete all of the screens in the Wizard in 5 minutes or less, and the actual time to import will rarely take more than a few minutes. But **the dialog box shown on this page is the key step in the process.** This is the "heavy-lifting" step in the process, in which you determine where each spreadsheet column belongs in the RESUMate record.

▽ tip #3

Don't worry if you make a mistake:

It is easy to delete the records you have just imported and start over again.

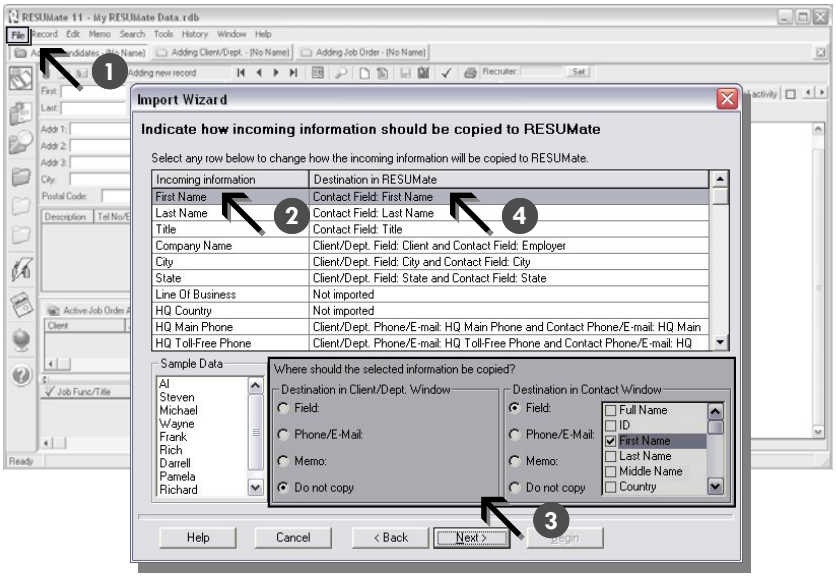
First, before you start the import process, make sure you have the automatic record date function turned on in **File | Database | Tools | Settings**. If you want to delete all the records you've imported and start over, do a search for records added today. With this search result on your screen, **click File | Database | Tools | Block Delete.**

The Import Wizard includes a series of dialog boxes, each of which has on-screen instructions. Simply read and follow the instructions for each step. Start the import process by clicking File | Database | Tools | Import Wizard (FIGURE 5.2 A, ❶).

Dialog Boxes 1-3: Click the Select File button on the first screen to point to the file that is to be imported. On the next screen, indicate whether the field delimiter is a comma or tab. Also on this screen indicate if the incoming file has a header line. On the third screen, indicate which type of record is to be created. If the incoming file is in the format of the Hoovers file shown previously, choose Company Window and check the box Also import linked Contact Window records.

Dialog Box 4: The Incoming information column (FIGURE 5.2 A, ❷) lists all of the column titles in the incoming spreadsheet. Sample data from each selected column is shown in a box below in case the column title is ambiguous.

FIGURE 5.2 A IMPORT WIZARD: DIALOG BOX 4



Use the Destination sections (FIGURE 5.2 A, ❸) to the right of the Sample Data box to select the exact location in the RESU*Mate* record for the selected column from the spreadsheet. Select from 3 general categories: Field, Phone/E-mail, Memo, or you can also choose Do not copy if the selected column in the spreadsheet is not to be imported. If either Field, Phone/E-mail, or Memo has been selected for either record type, then a detailed list will appear from which the exact location in the RESU*Mate* record can be selected. The selection made here will then appear in the Destination in RESUMate column (FIGURE 5.2 A, ❹) corresponding to the field highlighted in the Incoming information (FIGURE 5.2 A, ❷) column.

5.2 | (CONTINUED…)

Dialog Box 5: This next screen raises the important question of how duplicate records should be handled.

Three choices are presented for any record type that is being imported. Choosing either of the top two radio button choices will eliminate the possibility of creating duplicate records for either companies or linked contact people (FIGURE 5.2 B, ❶). Choosing the third radio button will allow duplicate records to be created.

In the Hoovers directory example being used for illustration purposes here, it will be best to eliminate or prevent duplicate Company records, but to allow all of the linked Contact records to be imported (FIGURE 5.2 B, ❷). The incoming directory file will not contain any duplicated names, and if a person record already exists in your database, the record coming in from the Hoovers file will not overwrite your pre-existing record.

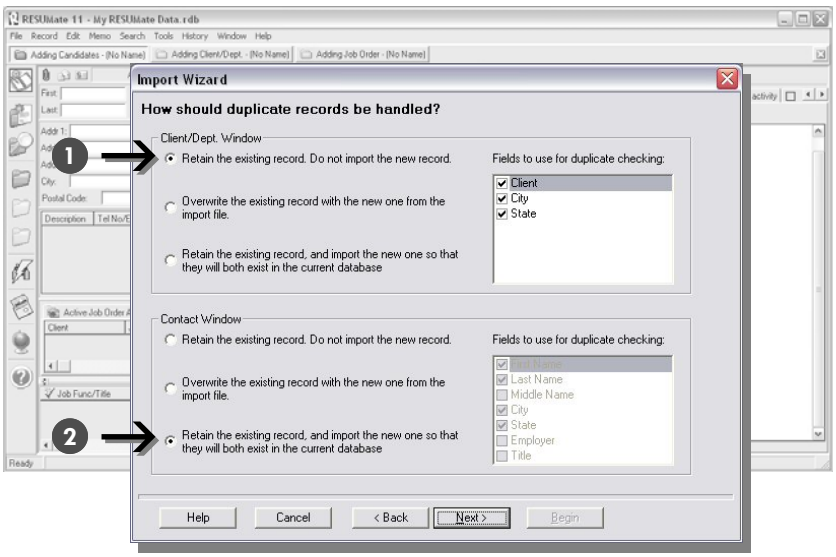
tip #4

Auto-Classifying records; Dialog box 6.

Any text that has been assigned to a Memo attachment in the mapping screen (Figure 5.2 A, shown on the previous page) can be used to select items from your customized Classification Table in the resulting records.

This may be useful, for example, if text in the Memo contains text describing products or services. Causing this data to appear in the Classification section may make your new records more consistent with records already in your database for searching purposes. It will also take advantage of any synonyms you have pre-loaded in your Classification table.

FIGURE 5.2 B IMPORT WIZARD: DIALOG BOX 5



Dialog Box 6: This screen in the Wizard deals with two final issues. Checking the top box **Auto-Classify incoming records** will cause any incoming data that has been directed to a Memo section to be matched against the Classification Table in this database. Checking the bottom box **Mark Contact window records as 'Contact Only'** marks all of the attached Contact person records with the **Contact Only** attribute. *(For a complete explanation see Seminar 3).*

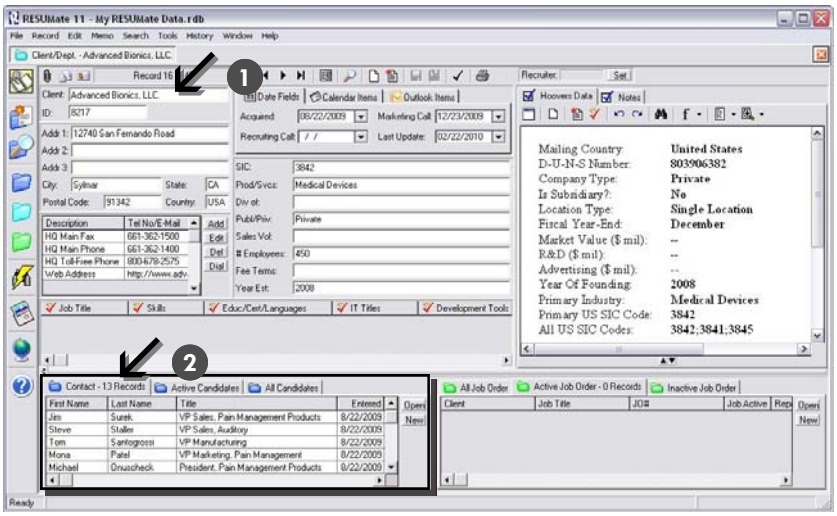
Dialog Box 7: Click **Begin** on this final screen to start the import process. A progress bar will appear. Once the import is complete, click **Close** to return to your main database view, and the imported records will now be included in your file.

5.3 | EVERY ROW IN THE SPREADSHEET BECOMES ONE RECORD (PERSON, COMPANY, OR JOB) IN RESUMATE.

For simplicity sake, we have been using the example of a purchased directory product, (in this case a Hoovers directory), which is a tab-delimited file that can be viewed in Excel. Remember that other types of files, such as a Microsoft Access file or a dBase file will also work as a starting point for the import process.

Typically, regardless of file type, one record in the incoming file creates one record in the RESU*Mate* database. If the incoming file contains candidate records, then one candidate record is created in RESU*Mate* corresponding to each record in the source file. If the incoming file contains client or job order information, then one client or job order record is created for each record in the source file (FIGURE 5.3, ❶).

FIGURE 5.3 THE CLIENT SCREEN (WITH THIRTEEN LINKED CONTACT RECORDS)



The specific example used here illustrates an important and highly useful exception to this rule. Beginning in RESU*Mate* 11, when importing files such as a typical directory, in which each row in the spreadsheet describes one person, and one column in the spreadsheet identifies this person's employer, then RESU*Mate's* Import Wizard can be instructed to create two records. One record is a company record, and the other is a contact person record, which is automatically linked to this Company.

Since directories often list multiple people with different job titles at the same company, this new function allows the creation of a single company record with multiple contact person records attached to this one company screen (FIGURE 5.3, ❷).

did you know?

RESUMate puts directories to good use:

The company record shown here contains all of the data needed to integrate this record into a marketing campaign. All of the contacts at this company have become linked contact person records to the main company screen. Starting from this screen, you can **easily assemble a call list or a bulk e-mail address list** for all of the contacts at all of the companies that have been found in a search result.

tip #5

In seconds, search online for more company info:

The company data imported from the directory can also be used by **RESUMate's Web Link function** to learn even more about this company than was contained in the original Hoovers listing. Links to 10 web sites are provided.

Click the Web Links icon in the main tool bar to visit sites such as Google Maps, Indeed, LinkedIn, Hoovers, and others.

5.4 | **EXPORTING RECORDS:** RESUMATE FIELD NAMES AND CLASSIFICATION TITLES CAN BECOME COLUMNS IN A SPREADSHEET.

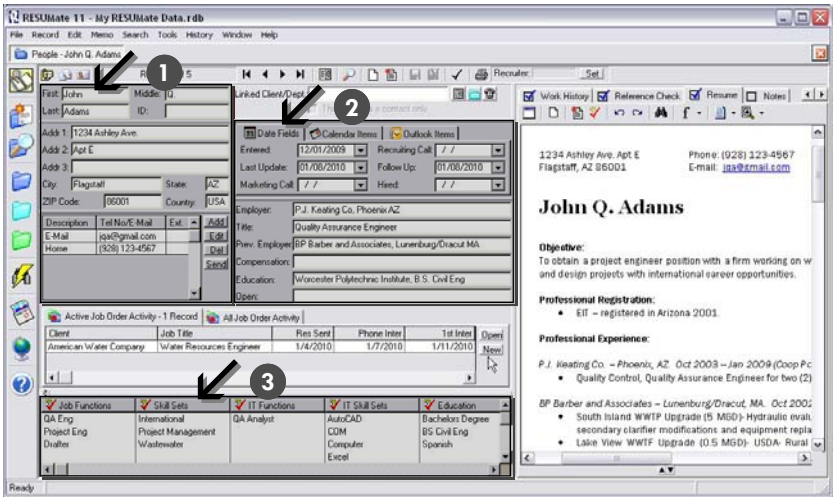
We've already seen how a row in a Excel spreadsheet can become an individual record in RESU*Mate*. The reverse is also true. Using the Export Wizard, column titles in the spreadsheet can come from these locations in the RESU*Mate* record:

- ⇒ Contact Info—Name, Address, Phones, and E-mails (FIGURE 5.4, ❶);
- ⇒ Date and Text field labels (FIGURE 5.4, ❷);
- ⇒ Classification Table column titles (FIGURE 5.4, ❸)

Rows in the spreadsheet reflect individual records in your RESU*Mate* database.

By far the most common use of RESU*Mate's* export function is to create a file that can be opened in Excel. In addition to Excel files, records in RESU*Mate* can also be exported to other file formats such as Microsoft Access or Outlook's Contacts database.

FIGURE 5.4 THE CANDIDATE SCREEN



To begin a discussion of RESU*Mate's* Export Wizard, it's important to point out at the beginning that the exported records will come from the open, active window currently occupying your RESU*Mate* screen. This can be:

- ⇒ A window displaying your entire database file of candidates, companies, or job orders
- ⇒ A window displaying a search result of candidates, companies, or job orders
- ⇒ A window displaying the candidates who have been linked to a job order
- ⇒ A window displaying the contact people linked to a company record

When the window of your choice is displayed on your screen, you're ready to begin the export process.

▽ tip #6

When to export, when not to export.

Use the export function if…

…you want to create some type of report in Excel.

…you want to export records to Outlook's Contacts database. This will allow you to move data from RESUMate, including the resume itself, to your hand held PC.

…you want to create another RESUMate database file, either for internal use, or to e-mail as an attachment to another RESUMate user.

Don't use the export function if…

…you want to copy your entire RESUMate database from one PC to another. The common scenario here is recovering from a hard drive crash, or simply replacing an old PC with a new one.

In this case simply copy the entire RESUMate database file onto an external (USB) drive, commonly called a "flash drive" or "memory stick," and then copy the file from the external drive to the new PC.

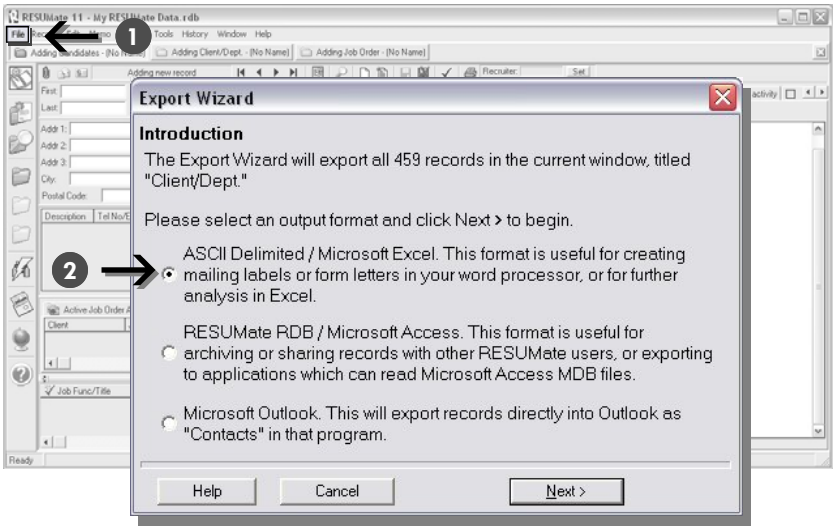
5.5 | THE EXPORT WIZARD "MAPS" RESUMATE FIELDS INTO EXCEL, ACCESS, OUTLOOK'S CONTACTS, OR ANOTHER RESUMATE DATABASE FILE.

The Export Wizard includes a series of dialog boxes, each of which has on-screen instructions. Simply read and follow the instructions for each step. To begin the export process, click **File | Database | Tools | Export Wizard** (FIGURE 5.5 A, ❶).

Dialog Box 1: On the first screen, choose from one of three export file formats:

⇒ **ASCII Delimited/Microsoft Excel**. Exporting to an Excel file allows you to create call lists and a variety of management reports. This is the most frequently used export choice.

FIGURE 5.5 A EXPORT WIZARD: DIALOG BOX 1



⇒ **RESUMate RDB/Microsoft Access**. Exporting to another RESU*Mate* database file allows you to e-mail records from your database to another RESU*Mate* user. Exporting to an Access file allows you to move content from your RESU*Mate* database to this widely used file format for creating custom reports, or simply moving your data to other application software.

⇒ **Microsoft Outlook**. Exporting data to Outlook's Contact file allows data from your RESU*Mate* file to be seen on your hand-held computer.

In this example we've chosen to illustrate an export to an Excel spreadsheet because Excel is the most commonly chosen export format (FIGURE 5.5 A, ❷). Click **Next** to move on to the next Wizard dialog box.

▽ did you know?

Exporting records is fast and easy:

Most export functions, from start to finish, take just a few minutes. Exporting to an Excel spreadsheet will almost always take less than one minute, and often just a few seconds. Even the process of using the Export Wizard itself, i.e. making decisions about what data to export, and in what format, will take just a minute or two. This is a simple process to learn, and a very fast process for doing a variety of useful things with your data.

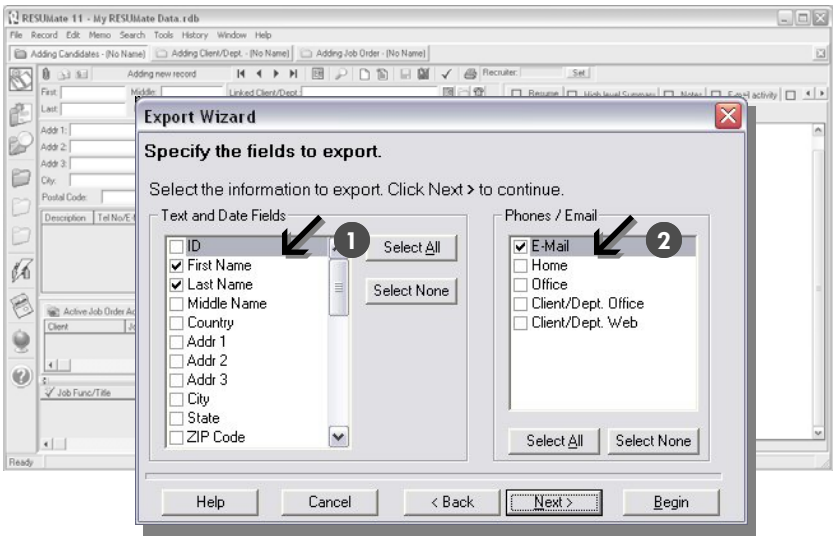
5.5 | (CONTINUED…)

Dialog Box 2: On this screen, we've chosen **Direct to Microsoft Excel**. Choosing this option will automatically and immediately open an Excel spreadsheet file as soon as the Import Wizard function is complete.

If you do not want to see the data immediately in Excel, choose either **CSV File** or **Tab-delimited File** to create a file that can be used later in Excel, or attached to an e-mail message so that your spreadsheet file can be shared with others.

Dialog Box 3: On this screen, select the data items that you want to become columns in the spreadsheet itself. Place a checkmark in the box to the left of any text and date field names (FIGURE 5.5 B, ❶), or phone number/e-mail designations (FIGURE 5.5 B, ❷) that you wish to move to Excel.

FIGURE 5.5 B EXPORT WIZARD: DIALOG BOX 3



Dialog Box 4: On this screen, place a checkmark to the immediate left of any Classification column title that you wish to become a column in the spreadsheet. This is the function that you will need to use if you are creating an EEO compliance report, but using Classification table data in a spreadsheet can serve other purposes as well.

Dialog Boxes 5-6: On these next two screens, choose the default options, which will put a header line at the top of the spreadsheet, using your customized field labels from RESU*Mate* as the individual column titles.

Dialog Box 7: On the final screen, click **Begin**, and in just a few seconds, the spreadsheet you have designed will be opened in Excel.

did you know?

Comma delimited vs. tab delimited files:

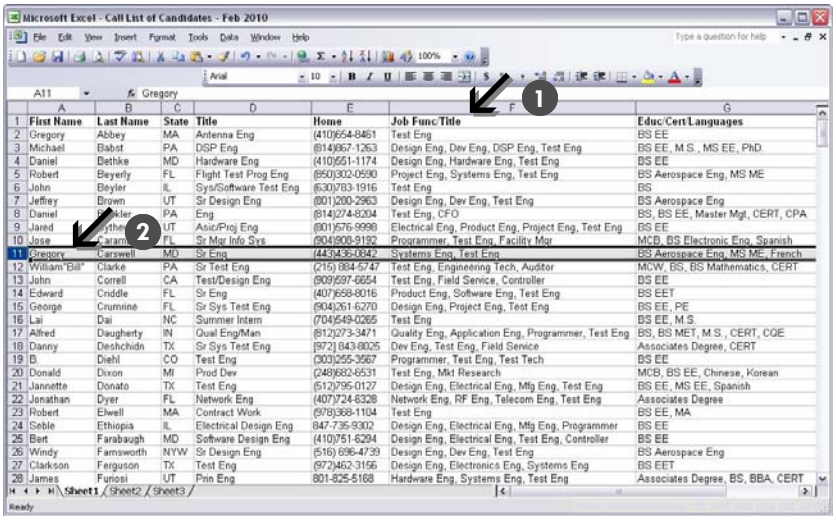
Comma delimited files use the file extension .csv, and can be opened immediately in Excel. If you create such a file and e-mail it, the recipient can simply double click the file to open it in Excel. **Tab delimited files use the file extension .txt**, and can also be opened in Excel, but only after a short, 3-step Wizard function has been performed in Excel itself.

If the data you are exporting **does not contain any commas,** choose the csv format as the export file type. If the data **may contain commas,** (such as a last name followed by a comma and then a certification such as MD, or PhD) then choose the tab delimited format.

5.6 | EVERY RECORD IN RESUMATE (PERSON, COMPANY, OR JOB) BECOMES ONE ROW IN THE SPREADSHEET.

Each of the column headings that you see in the spreadsheet below were all taken from one of these four locations in the RESU*Mate* Candidate record: (1) Name and Address section; (2) Phone and E-mail section; (3) Date and Text fields; and (4) the Classification Table. (FIGURE 5.6, ❶). Each row in the spreadsheet reflects an individual record in RESU*Mate* (FIGURE 5.6, ❷).

FIGURE 5.6 CALL LIST OF CANDIDATES IN EXCEL



	First Name	Last Name	State	Title	Home	Job Func/Title	Educ/Cert/Languages
2	Gregory	Abbey	MA	Antenna Eng	(410)654-8451	Test Eng	BS EE
3	Michael	Babst	PA	DSP Eng	(814)867-1263	Design Eng, Dev Eng, DSP Eng, Test Eng	BS EE, M.S., MS EE, PhD
4	Daniel	Bethke	MD	Hardware Eng	(410)551-1174	Design Eng, Hardware Eng, Test Eng	BS EE
5	Robert	Beyerly	FL	Flight Test Prog Eng	(850)302-0590	Project Eng, Systems Eng, Test Eng	BS Aerospace Eng, MS ME
6	John	Beyler	IL	Sys/Software Test Eng	(630)783-1916	Test Eng	BS
7	Jeffrey	Brown	UT	Sr Design Eng	(801)280-2963	Design Eng, Dev Eng, Test Eng	BS Aerospace Eng
8	Daniel	Buckler	PA	Eng	(814)274-8204	Test Eng, CFO	BS, BS EE, Master Mgt, CERT, CPA
9	Jared	Cythe	UT	Asic/Proj Eng	(801)576-9998	Electrical Eng, Product Eng, Project Eng, Test Eng	BS EE
10	Jose	Caramb	FL	Sr Mgr Info Sys	(904)909-9192	Programmer, Test Eng, Facility Mgr	MCB, BS Electronic Eng, Spanish
11	Gregory	Carswell	MD	Sr Eng	(443)435-0342	Systems Eng, Test Eng	BS Aerospace Eng, MS ME, French
12	William"Bill"	Clarke	PA	Sr Test Eng	(215) 884-5747	Test Eng, Engineering Tech, Auditor	MCW, BS, BS Mathematics, CERT
13	John	Correll	CA	Test/Design Eng	(909)597-6654	Test Eng, Field Service, Controller	BS EE
14	Edward	Criddle	FL	Sr Eng	(407)658-8016	Product Eng, Software Eng, Test Eng	BS EET
15	George	Crumnine	FL	Sr Sys Test Eng	(904)261-6270	Design Eng, Project Eng, Test Eng	BS EE, PE
16	Lai	Dai	NC	Summer Intern	(704)549-0265	Test Eng	BS EE, M.S.
17	Alfred	Daugherty	IN	Qual Eng/Man	(812)273-3471	Quality Eng, Application Eng, Programmer, Test Eng	BS, BS MET, M.S., CERT, CQE
18	Danny	Deshchidin	TX	Sr Sys Test Eng	[972] 843-8025	Dev Eng, Test Eng, Field Service	Associates Degree, CERT
19	B.	Diehl	CO	Test Eng	(303)255-3567	Programmer, Test Eng, Test Tech	BS EE
20	Donald	Dixon	MI	Prod Dev	(248)682-6531	Test Eng, Mkt Research	MCB, BS EE, Chinese, Korean
21	Jannette	Donato	TX	Test Eng	(512)795-0127	Design Eng, Electrical Eng, Mfg Eng, Test Eng	BS EE, MS EE, Spanish
22	Jonathan	Dyer	FL	Network Eng	(407)724-8328	Network Eng, RF Eng, Telecom Eng, Test Eng	Associates Degree
23	Robert	Elwell	MA	Contract Work	(978)368-1104	Test Eng	BS EE, MA
24	Seble	Ethiopia	IL	Electrical Design Eng	847-735-9302	Design Eng, Electrical Eng, Mfg Eng, Programmer	BS EE
25	Bert	Farabaugh	MD	Software Design Eng	(410)751-6294	Design Eng, Electrical Eng, Test Eng, Controller	BS EE
26	Windy	Farnsworth	NYW	Sr Design Eng	(516) 696-4739	Design Eng, Dev Eng, Test Eng	BS Aerospace Eng
27	Clarkson	Ferguson	TX	Test Eng	(972)462-3156	Design Eng, Electronics Eng, Systems Eng	BS EET
28	James	Funosi	UT	Prin Eng	801-825-5168	Hardware Eng, Systems Eng, Test Eng	Associates Degree, BS, BBA, CERT

Spreadsheets created from RESU*Mate* records serve a wide variety of uses, and take just a minute or less to create.

To create a daily call list, do a search in RESU*Mate* based on the Next Call date field, and then export names, addresses, phone numbers, and e-mail addresses into a spreadsheet format.

To create a report, such as a report of the average number of days required to fill jobs, do a search of job orders entered in a given time period. Export selected fields to Excel, including the job creation date and the closed date. Use Excel to compute the number of days required for each job, as well as the average number of days for all jobs, or selected classifications of jobs in the list.

To create an EEO Compliance report, put any job on your screen, and open the list of all candidates linked to that job. Create an Excel spreadsheet that lists names and other reference data for each candidate who has applied for that position, along with columns from the Classification table, indicating race, gender, EEO job classification code, disposition code, etc.

tip #7

Include Classification Table columns in the export file:

For EEOC compliance reporting, the Classification table is almost certainly the best place to record race, gender, ethnicity, veteran's status and other data needed for these reports. Beginning in RESUMate 11, Classification Table data can be selected in the Export Wizard, making EEOC reporting very fast and easy.

Even creating simple call lists in Excel can take advantage of this new function. In addition to listing names and phone numbers, it's now easy to include job titles, skills, and education as spreadsheet columns in the call list, which can make for better, more informed phone calls.

tip #8

"Links don't travel":

If you export candidate records, **any links of the candidate records to job order records are NOT included** in the export. If we included the linked job orders in the export, then we'd have to include the companies and hiring managers linked to these job orders, and then the other records linked to these companies and hiring managers, and so forth. For this simple, logical reason, **links don't travel.**