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2. |

CUSTOMIZING RESUMATE FOR MAXIMUM PRODUCTIVITY

We LOVE this product. It does exactly what we were hoping for and more...and we have barely scratched the surface.

(Londonderry, New Hampshire)

INTRODUCTION:

RESUMate is an “off-the-shelf” program, but it is easily customized to look and feel like custom software developed just for you.

How well you’ve customized your program determines many things: what kinds of reports you can create; the speed and quality of searches; even how much information is at your fingertips during phone conversations with hiring managers and candidates.

The pre-customized database file that opens automatically when you first install RESUMate may in fact require very little customization. Nevertheless, it’s a good idea to spend some time dealing with the topics covered in this document. Customizing your database is easy, and will reward you year after year as you use your RESUMate 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 2:

- 2.1 RESUMate comes ready to use with common sense, pre-loaded field names and keywords.
- 2.2 Start your customization process by choosing from 20 pre-loaded, industry-specific keyword lists.
- 2.3 Make the keyword list your own: add, edit, and delete items; Add entire columns of your own.
- 2.4 Why bother with synonyms? They make searches faster and better.
- 2.5 Custom name all of the date and text fields. Automatically number and “date stamp” records too.
- 2.6 Templates of interview questions and job order questions are pre-loaded. Add others of your own.

2.1 | RESUMATE COMES READY TO USE WITH COMMON SENSE, PRE-LOADED FIELD NAMES AND KEYWORDS.


You can start using RESUMate right away, using the default field names, keyword lists, and templates that we have already set up for you. The date and text field names (FIGURE 2.1, ❶) that you see when you first open the program are “generic,” and should make sense regardless of your recruiting specialty or type of business.

RESUMate’s Candidate screen also includes a Classification section, (FIGURE 2.1, ❷) located at the bottom of the screen. Words and phrases appearing in this section were extracted from a pre-set, customized keyword list called the **Valid Table**. There’s a “starter set” of keywords and phrases that have been pre-loaded in the program. Here, too, you can build on this starting point, by deleting words and phrases of no value to you, and then adding words and phrases that are truly important to you.



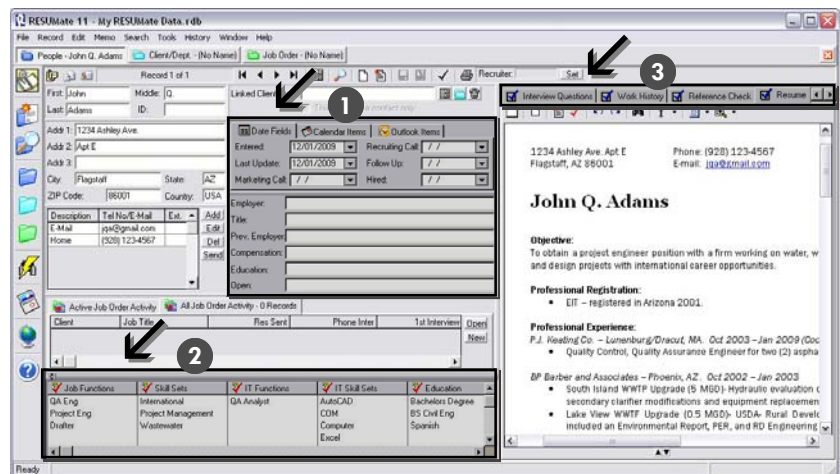
▼ tip #1

Help from the RESUMate website:

This topic is also covered in video form  on the Training page at our website (www.resumate.com/training.asp).

Click on the link titled “Training Videos Page” in the box labeled “In Depth Tutorials” and play the videos titled **Database Settings** and **Valid Table Editor**.

FIGURE 2.1 PRE-LOADED FIELD NAMES AND KEYWORDS



Finally, your database also comes pre-loaded with templates of interview questions, reference check questions, and work history questions. These “standard” memo attachments (FIGURE 2.1, ❸) can be modified to suit your own information preferences. You can also add completely new templates of your own.

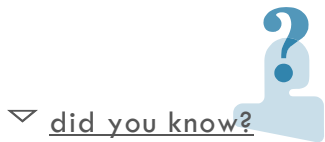
You don’t need to customize your database perfectly on day one. You can get started right away, and then continue to improve the customization of your database as you gain more experience using it.

2.2 | START YOUR CUSTOMIZATION PROCESS BY CHOOSING FROM 20 PRE-LOADED, INDUSTRY-SPECIFIC KEYWORD LISTS.

Starting from any screen, click **File | Database | Tools | Edit Valid Table**. You'll see the **Valid Table Editor** (FIGURE 2.3, ON THE FOLLOWING PAGE).

A small number of columns will appear right away. Depending on the kinds of candidates you recruit, a good first step will be to select some additional columns containing industry specific keywords and phrases.

In the Menu line at the top of the **Valid Table Editor**, click **Column | Import**, to see the screen illustrated below. Here you can choose the industry of most interest to you (FIGURE 2.2, ❶).



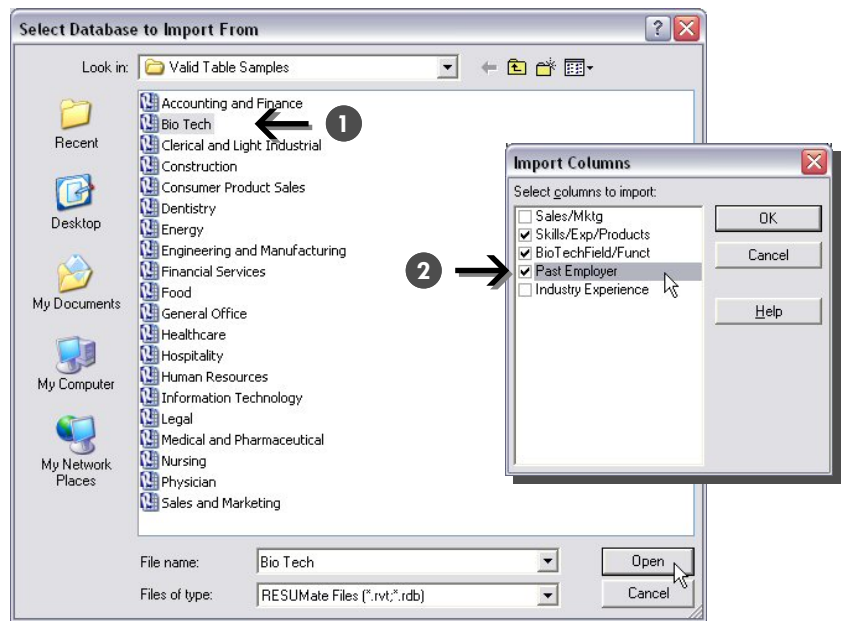
did you know?

Our pre-loaded lists are a good place to start.

We've tried to collect good ideas from past customers over a period of several years, but we're certainly not experts in every field. We offer these 20 lists as starting points, not the last word.

You can always delete columns later, even if you select them here. Then add columns of your own, or add and delete items within a column until it's tailored exactly for you.

FIGURE 2.2 PRE-LOADED INDUSTRY KEYWORDS



Once you have selected an industry, you'll see a list of column titles. Select as many column titles that seem relevant to you. In this example, we've chosen to import three columns from the **Bio Tech** keyword list (FIGURE 2.2, ❷).

The columns you select will instantly appear at the far right side of the **Valid Table Editor** screen (FIGURE 2.3, ON THE FOLLOWING PAGE).

Now you have a good starting point from which to create a final keyword list that will work well for you.



tip #2

Help from the RESUMate program:

Use the Help system: When the Valid Table Editor is open on your screen, simply **TOUCH F1** on your keyboard for a complete, illustrated discussion of this function.



tip #3

Alphabetizing keywords:

You can easily alphabetize an entire column or a section within a column.

With the Column Editor open, single click the top item in the range of items to be alphabetized. Next, scroll down to the bottom item in the range. Holding down the shift key, click the bottom item. All the items in the range will become highlighted.

Click the A to Z icon at the top of the Column Editor tool bar, and the selected range will be alphabetized.

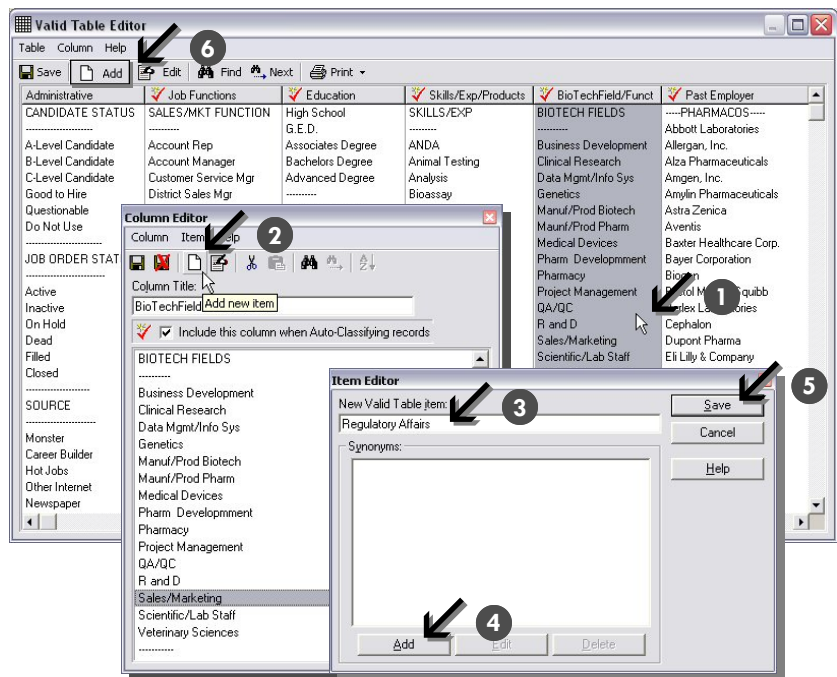
2.3 | MAKE THE KEYWORD LIST YOUR OWN: ADD, EDIT, AND DELETE ITEMS; ADD ENTIRE COLUMNS OF YOUR OWN.

RESUMate’s keyword list is an important search tool. It allows you to assign a consistent set of attributes to records so that they can be more easily and quickly collected into a search result. It’s important therefore to edit the starting point file to make sure your list contains those words and phrases of most interest to you.

To edit an existing column, double click anywhere in the column to open the Column Editor. In this example, we’ve double clicked the BioTechField/Funct column (FIGURE 2.3, ❶).

To add a new keyword, place your cursor anywhere in the column and click the Add New Item icon (FIGURE 2.3, ❷). Type in your new keyword in the Item Editor. In this example, we’ve added the term Regulatory Affairs (FIGURE 2.3, ❸).

FIGURE 2.3 CUSTOMIZING YOUR KEYWORD LIST



Note: You can also add synonyms to your new item by clicking the Add button at the bottom of the Item Editor (FIGURE 2.3, ❹). Once you have saved the item and it’s synonyms, click Save (FIGURE 2.3, ❺). The item will appear immediately above the starting cursor position.

To add a completely new column of your own, click the Add button at the top of the main Editor screen (FIGURE 2.3, ❻).

2.4 | WHY BOTHER WITH SYNONYMS? THEY MAKE SEARCHES FASTER AND BETTER.

Synonyms are really pre-loaded **OR conditions** for searches. They solve the problem that job titles and skills are often expressed in different ways, and we have no way of knowing in advance what word choices the candidate has made when composing a resume.

When words and phrases are being automatically extracted from incoming resumes, synonyms assure complete and accurate assignment of attributes to the incoming record.



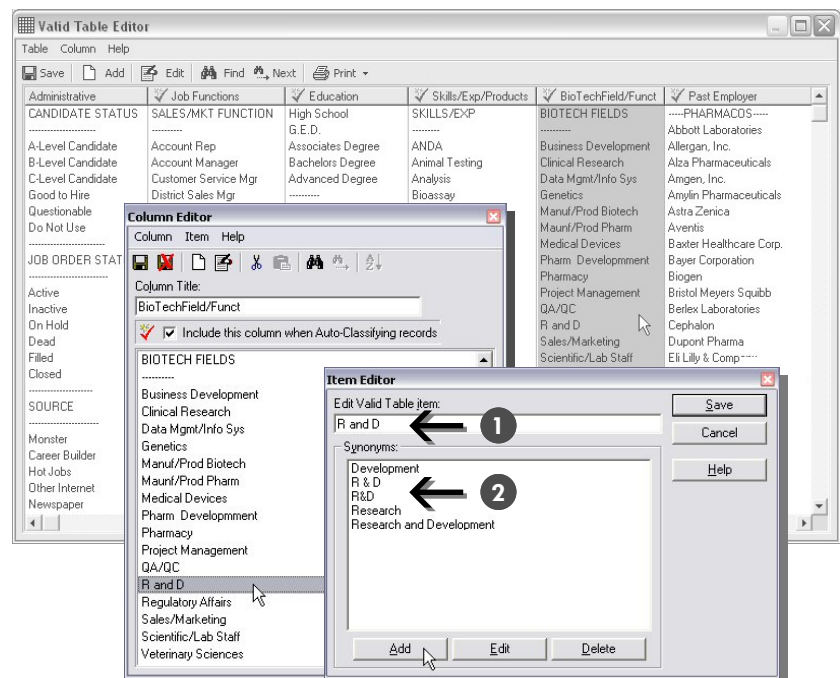
did you know?

Make your keyword list "good" not perfect.

You don't need to make your keyword list perfect on day one. You can get started right away, and then continue to add keywords and synonyms as you gain more experience using your program.

When you add new items to your table, all pre-existing records in your database will be updated automatically.

FIGURE 2.4 KEYWORD SYNONYMS



The example shown above illustrates synonyms for the keyword **R and D** located in the **BioTechField/Funct** column of the **Valid Table** (FIGURE 2.4, ①).

There are five pre-loaded synonyms for this item (FIGURE 2.4, ②). When any one of these six words or phrases is found in an incoming resume, the classification section of the candidate's record is automatically marked with the expression **R and D**.

When adding new items of your own, choose one expression as the **Valid Table** item, and include as synonyms any other words or phrases that mean the same thing.

2.5 | CUSTOM NAME ALL OF THE DATE AND TEXT FIELDS. AUTOMATICALLY NUMBER AND “DATE STAMP” RECORDS TOO.

There are six customizable date fields and six customizable text fields on the main RESUMate screen. Choose your date and text field names with an eye to creating reports automatically from your database. For example, all of the field names that you see on the screen (name, address, phone and e-mail descriptions, date fields, and text fields) can become column titles in an Excel spreadsheet.



▽ tip #4

Date field suggestions:

There are three date field labels that will probably work for everyone: (1) Entered; (2) Last update; and (3) Hired (or Placed).

The other three default candidate date fields are: (1) Marketing call; (2) Recruiting call; and (3) Follow up call.

These make sense for a contingency search firm, but if your organization is a corporate HR department, other date labels may work better for you.



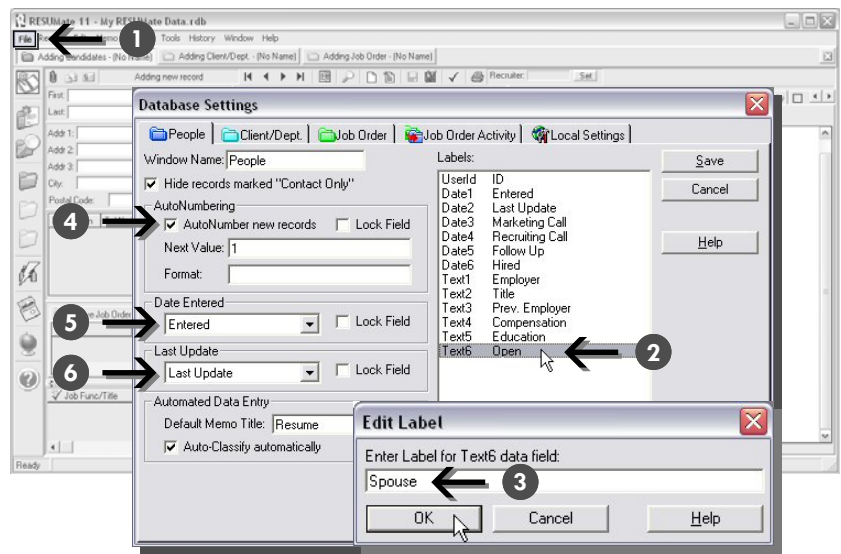
▽ tip #5

Data security:

Checking anyone of the Lock Field boxes causes the corresponding field names to be “grayed out” on the main database record. This means these fields cannot be changed by other database users.

To begin, click the **File** menu in the upper left corner of the main RESUMate screen, (FIGURE 2.5, ❶) then select **Database | Tools | Settings**. The **Database Settings Window** will open.

FIGURE 2.5 NAMING THE DATE AND TEXT FIELDS



The date and text fields are listed at right in the **Labels** box. Double clicking one of the fields will open it for editing. Here we've selected **Text 6** (FIGURE 2.5, ❷). In the **Edit Label** box we've typed **Spouse** replacing the previous label, **Open**, for this field (FIGURE 2.5, ❸). Rename as many fields as you like.

Note: In the Professional version, the Client and Job Order screens also have date and text fields that you can custom name.

New database records can be numbered automatically when they are first saved into the database. Checking the box labeled **AutoNumber new records** (FIGURE 2.5, ❹) activates this automatic numbering system.

Records in the database can be automatically marked with today's date (FIGURE 2.5, ❺) whenever a new record is added to the database or an existing record is edited (FIGURE 2.5, ❻). Simply select the appropriately named date fields in the boxes provided for this purpose.

2.6 | TEMPLATES OF INTERVIEW QUESTIONS AND JOB ORDER QUESTIONS ARE PRE-LOADED. ADD OTHERS OF YOUR OWN.



tip #6

Help from the RESUMate program:

Use the Help system: When the Database Settings dialog box is open on your screen, simply **TOUCH F1** on your keyboard for a complete, illustrated discussion of this function.



did you know?

Templates encourage "best practices":

Pre-loaded templates add the quality of consistency to your database records. No matter which person in your organization conducts an interview, for example, the same set of topics will be covered and documented.

Like any other Memo, these templates can be searched. For example, the candidate's answers to interview questions can be used in setting up searches.

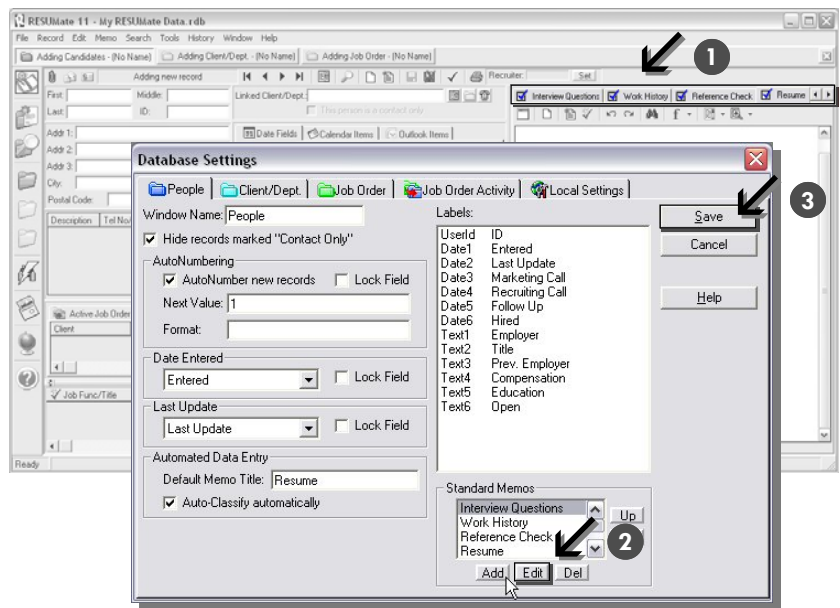
For more information on searching, see **Seminar 3: The best RESUMate searching practices.**

Four templates come pre-loaded in your RESUMate database. The Candidate record includes templates for interview questions, reference check questions, and detailed work history questions. In the Professional version, the Job Order record includes a template for job order qualifying questions.

Templates can be seen on the right side of the RESUMate record. To view any template, select the template name from the tabs at the top of the Memo section (FIGURE 2.6, 1).

Standard Memos can be added and/or edited from the Database Settings dialog box. To open the dialog box, click File | Database | Tools | Settings.

FIGURE 2.6 STANDARD MEMOS



To edit a pre-loaded template, highlight the template name and click **Edit** (FIGURE 2.6, 2). The template will be displayed in a full screen text editor (*not shown here*). Make any changes you wish, and then click the **Save** icon in the upper left corner. You can also add new templates of your own, by clicking the **Add** button, next to **Edit**.

When you've finished making changes in the Database Settings dialog box, click the **SAVE** button (FIGURE 2.6, 3). All of your changes will now appear in all the records in your database.