RESUMate 10

Getting Started Guide

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Professional Software. No-Nonsense Prices. Since 1988.

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RESUMate

Introduction

Welcome to RESUMate 10, the fast and easy way to build a searchable database of candidate records directly from resumes.

There are two versions of RESUMate, called Lite and Professional.

RESUMate Lite uses the name, address, phone numbers, e-mail addresses, and user-specified keywords that occur in the text of the resume to build an easy-to-search database record. Complete search functionality is also included in the program. Every piece of information in the candidate record can be used, in combination with any other information in the record, to search your database and find any profile you can think of. Most searches of a database take just a few seconds to complete.

The Professional version includes this same candidate record-building and searching functionality, but adds to it the ability to track a candidate through the hiring process. It does this by integrating records of companies (or departments or locations) and job openings with the candidate records. This Professional version is intended for recruiting professionals who need a comprehensive record keeping system that completely integrates records of candidates with job openings, companies/locations, and hiring managers.

An integrated calendar is also included in both versions. In the Professional version, a 1-click Daily Planner finds just those records that require attention today, and gathers them into an easy-to-read Daily Planner format, which is opened automatically when the RESUMate program is started.

Registration Information

If you've already purchased the RESUMate program, you received, via e-mail, a unique registration name and code. When you first start the program, you will be asked to type in this information. Once the registration information has been entered, you will not need to type this information again.

If you are still evaluating RESUMate, when asked for your registration information, simply choose "Use in Demo Mode". This will allow you access to the entire program, but will limit the size of the RESUMate database to 20 records. Entering a valid registration code will remove the record limit.

You can always see your unique registration name and code by clicking the **Help** menu and selecting **About**.

Help/About will also display the exact configuration *(Lite or Professional version; the number of network user licenses, and any special features, such as Import Express)* authorized by your registration code.

Installing RESUMate 10

RESUMate is most often installed as a download from www.resumate.com; you can download the program as many times as you like from the Support page. A CD version is also available.

If you downloaded the program from our website, simply double click the downloaded file and follow the on-screen instructions. If you have the RESUMate CD, insert it into your computer and follow the on-screen instructions. There is no difference between the download and CD versions.

If you will be using RESUMate as a single user, select the Single-User installation option in the installation program.

If you will be using RESUMate on a local area network, please read the instructions below.

Network Installation

If you are installing RESUMate on a network, first you'll need to decide which PC in your office will act as the file server. You can have a dedicated file server or you can have one of your user's PCs act as the file server. If you have a dedicated file server (a PC where the data is stored but is not used by anyone to run RESUMate) run the RESUMate install file and select the Network Fileserver installation. That will create a RESUMate folder which will contain the database file. If you do not have a dedicated file server, run the RESUMate install file on the PC which will act as the server on your peer-to-peer network and select the Single User installation option.

Once the install has finished you'll need to share the new RESUMate folder on your network and allow network users full access to change the files. By default the RESUMate folder is located in the My Documents (XP) or Documents (Vista) folder; if you wish you can choose another location during installation. If you are un-sure how to share the folder, consult your IT department or IT consultant.

Once you have the folder shared, you can run the RESUMate install file on the other PCs where RESUMate will be used. When installing, select the Network Workstation option. You'll be prompted to navigate to your shared folder, once you've pointed RESUMate to the shared folder the installation can proceed.

If you have any questions about installing RESUMate, please contact technical support:

E-mail: techsupport@resumate.com
Toll Free: 800-530-9310 ext. 203
Outside North America: +1-734-477-9402 ext. 203

Tools for learning about RESUMate 10

There are two sources of excellent, easy-to-use tools that will help you learn how to use RESUMate.

- Training videos at our website
- On-line help text, built right into the RESUMate program itself

Training videos at our website

There are several training videos at our website that will help you as you start using RESUMate. The topics covered include creating database records from resumes, searching the database, modifying RESUMate's list of keywords and phrases and customizing the database.

The videos are interactive and show you exactly how to perform many common and not so common tasks in RESUMate. You can view them any time.

On-line help text in the program itself

A comprehensive reference manual has been built into the RESUMate program. It contains illustrated help for every single screen in RESUMate. The manual is "context sensitive," which means that pressing F1 on your keyboard will automatically open the manual to an illustrated article for the screen which you are using.

If you're ever wondering what something on a RESUMate screen is or what it does, the answer can usually be found by pressing F1.

Using Web resources

Visit our website (www.resumate.com) to access additional resources for learning how to get the most out of RESUMate. These resources are updated frequently, so it's a good idea to visit the site on a regular basis.

Customer support

Registered users can call anytime (9:00 a.m. to 6:00 p.m. Eastern time U.S.) for answers to specific technical or operational questions. Questions can also be e-mailed to techsupport@resumate.com.

Add a few records to your new database

One way to get started quickly is to put a few new records into your database, using the automatic record creation function that is an important part of RESUMate. Here's all you need to do.

With the RESUMate program running on your PC, open a resume document in Microsoft Word. Jump back to RESUMate, and click on the icon at the top of the stack of icons on the left side of the screen. This will open a dialog box with the title "Start Automated Data Entry." The Word doc tab is already in the foreground, and you'll see the file name of the open Word doc resume already on this tab. Click the Start button on the tab.

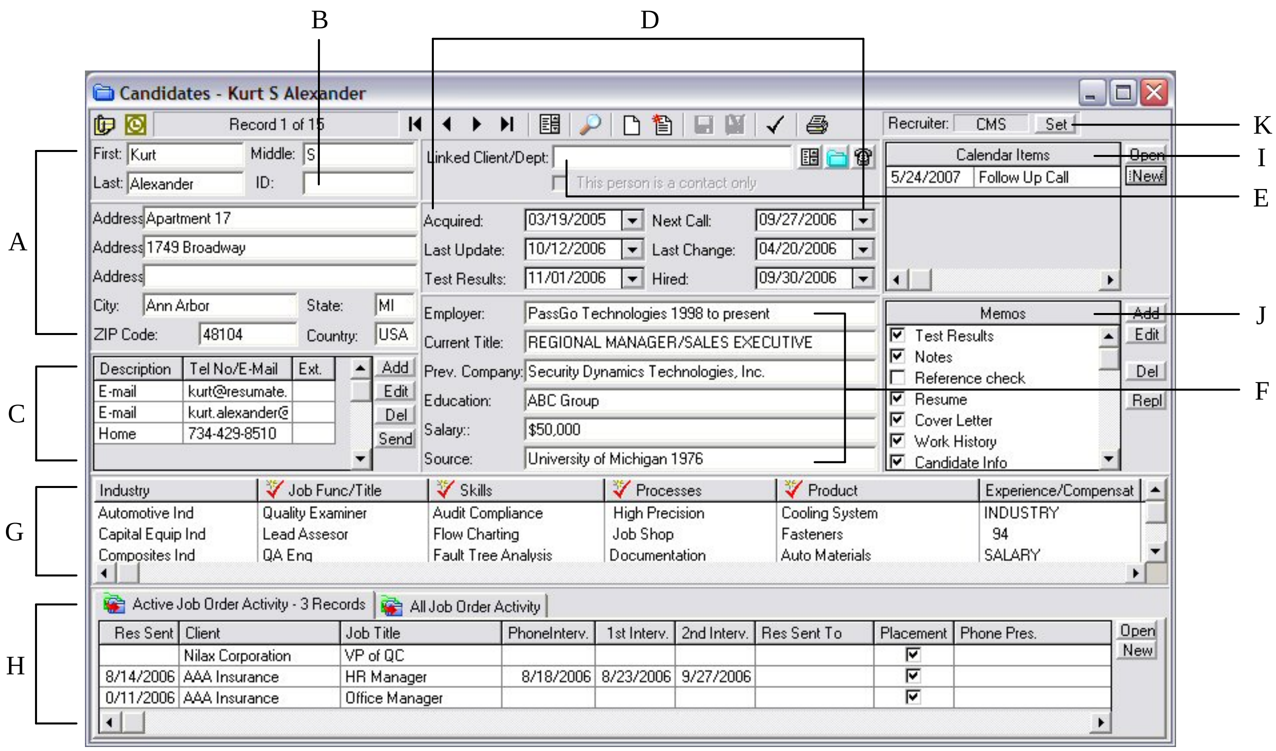
You'll see a split screen, with the content of the resume shown on the left, and a preview column on the right, showing how the automatic extraction of the name, address, phone numbers, e-mail address, and key words has taken place.

If the extractions were all done correctly, close this window, and click the Save icon (the fourth icon from the right in the horizontal tool bar at the top of the screen).

If the extractions were not all done correctly, you can fix any incorrect data using your mouse to highlight the correct data, and then clicking on one of the four buttons labeled Name, Address, Phones, and Other fields that appear just above the resume text.

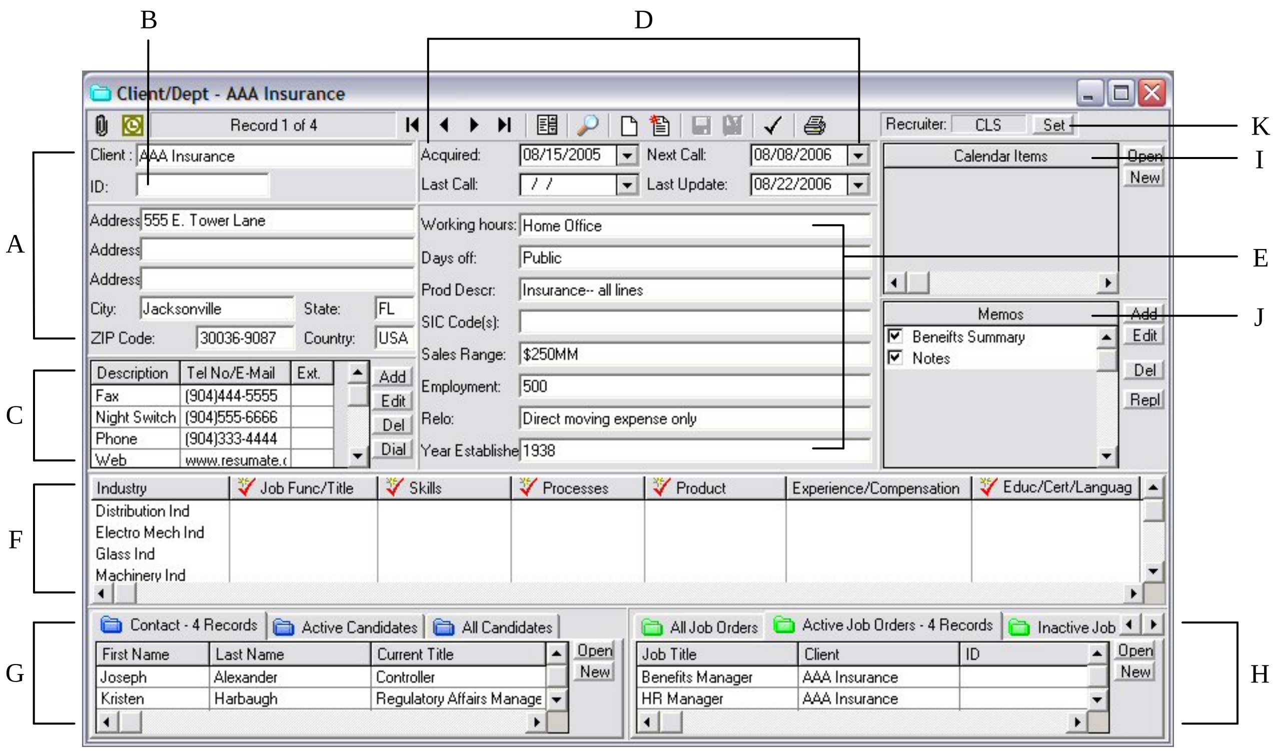
To see a complete discussion of this Automated Data Entry feature, click the icon at the top of the stack of icons on the left side of the screen ("Click to create a new candidate record"). This will open a

The Person Window *(the Lite and the Professional Versions)*



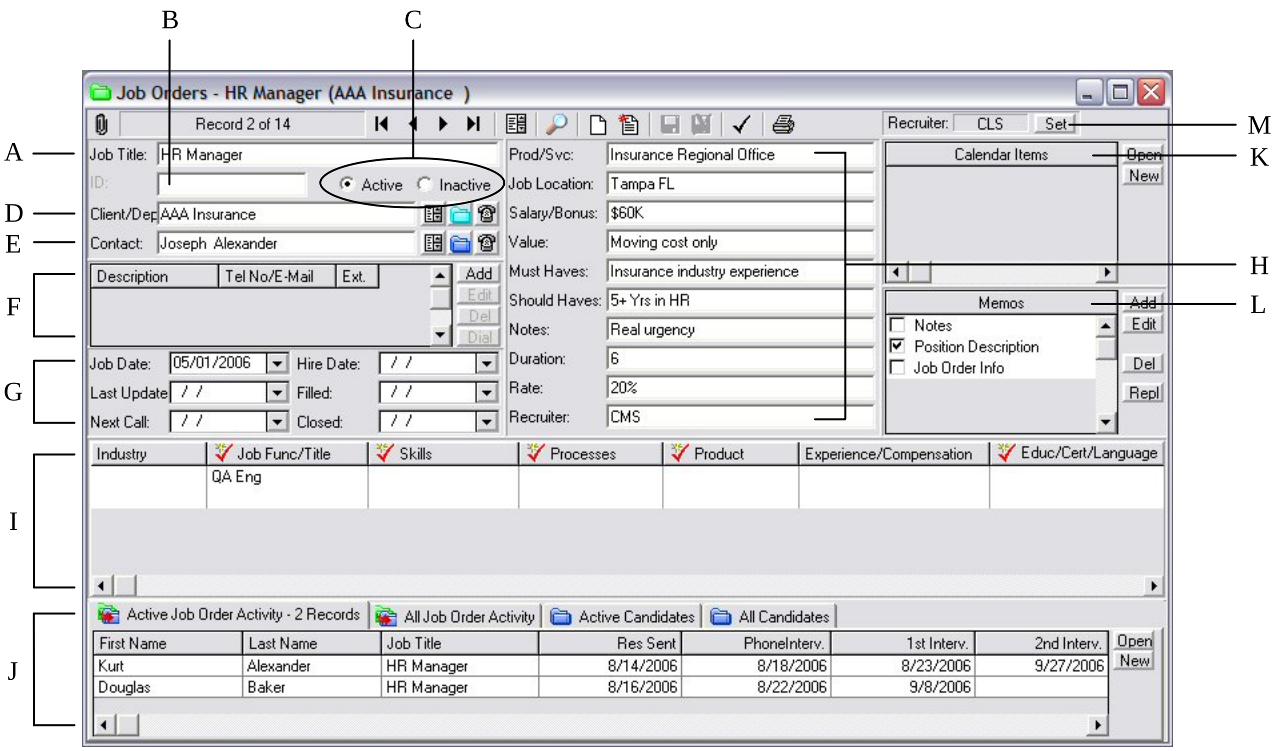
A. Name and address information goes here. Addresses can be formatted for U.S., Canadian, or International formats. **B.** A unique Identification number for this person's record can be inserted into this field automatically, when the record is first created. **C.** Phone numbers, e-mail addresses, and web addresses go here. E-mail messages can be launched from here, and web addresses can be opened. **D.** These six date fields can be custom-named, if you wish. **E.** People records can be directly linked to company records here. Usually this is used to link records of hiring managers to company or location records. Most often, it is left blank on a candidate screen. **F.** These six text fields can also be custom-named. They usually contain information about major data items, such as current employer, or compensation, or title. **G.** This section lists any words or phrases that have been selected from a customized master list of keywords that identify job titles, skills, products, or other attributes that describe this person. This keyword assignment can be done completely automatically when a record is added to the database, or attributes can be manually selected as well. **H.** In the Professional version only, this section lists any job orders on which this person has been submitted. The purpose of this section is to show "at-a-glance," detailed information about all jobs for which this person has been considered. This section of the record is omitted from people records in the Lite version. **I.** This section can be used to enter items into a calendar that is linked to records in the database. In a network environment, each user of RESUMate can have a private calendar, but a shared, office-wide calendar can also be accessed from each PC on the network. **J.** The purpose of this Memo section is to provide space for open-ended text, such as the full resume, or notes made after phone calls, or questionnaires, or scripts for different types of phone calls. **K.** To assign responsibility for this record to a specific person, click the Set button to select a recruiter's initials from a drop down list displaying all recruiters in an office.

The Company Window *(the Professional Version only)*



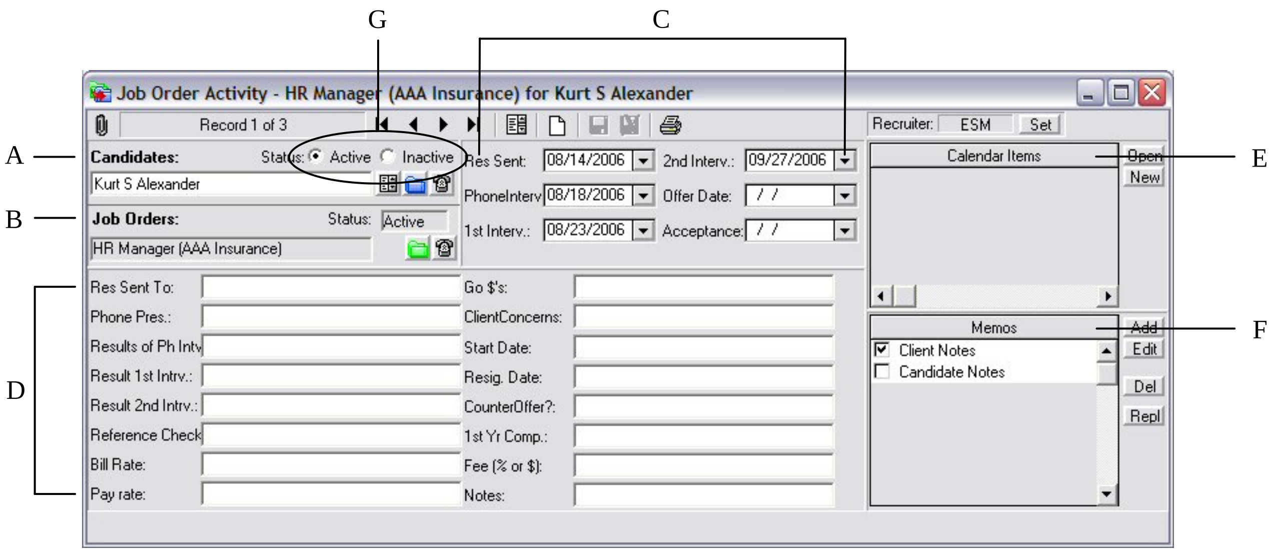
A. Company name and address information goes here. Addresses can be formatted for U.S., Canadian, or International formats. **B.** A unique Identification number for this company record can be inserted into this field automatically, when the record is first created. **C.** Phone numbers, e-mail addresses, and web addresses go here. E-mail messages can be launched from here, and web addresses can be opened. **D.** These four date fields can be custom-named, if you wish. **E.** These eight text fields can also be custom-named. They usually contain information about major data items, such as major products or services, SIC codes, relocation policy, whether the company is public or private, etc. **F.** This section lists any words or phrases that have been selected from a customized master list of keywords called the Valid Table. On company records, this section is often unused, but can be used to contain such information as benefits summaries, or annual sales, or employee counts. **G.** This section displays lists of people who are associated with this company or location. One tab displays contact people, (usually hiring managers) at this location, while the other two tabs display either all candidates who have ever been referred to this location, or only candidates who are currently being referred on open jobs. **H.** This section displays job orders (or requisitions) that have come from this company or location. Tabs allow the list to display all jobs, only active jobs, or only closed jobs. **I.** This section can be used to enter items into a calendar that is linked to records in the database. In a network environment, each user of RESUMate can have a private calendar, but a shared, office-wide calendar can also be accessed from each PC on the network. **J.** The purpose of this Memo section is to provide space for open-ended text, such as notes made after phone calls, or questionnaires, or scripts for different types of phone calls. **K.** To assign responsibility for this record to a specific person, click the Set button to select a recruiter's initials from a drop down list displaying all recruiters in an office.

The Job Order Window *(the Professional Version only)*



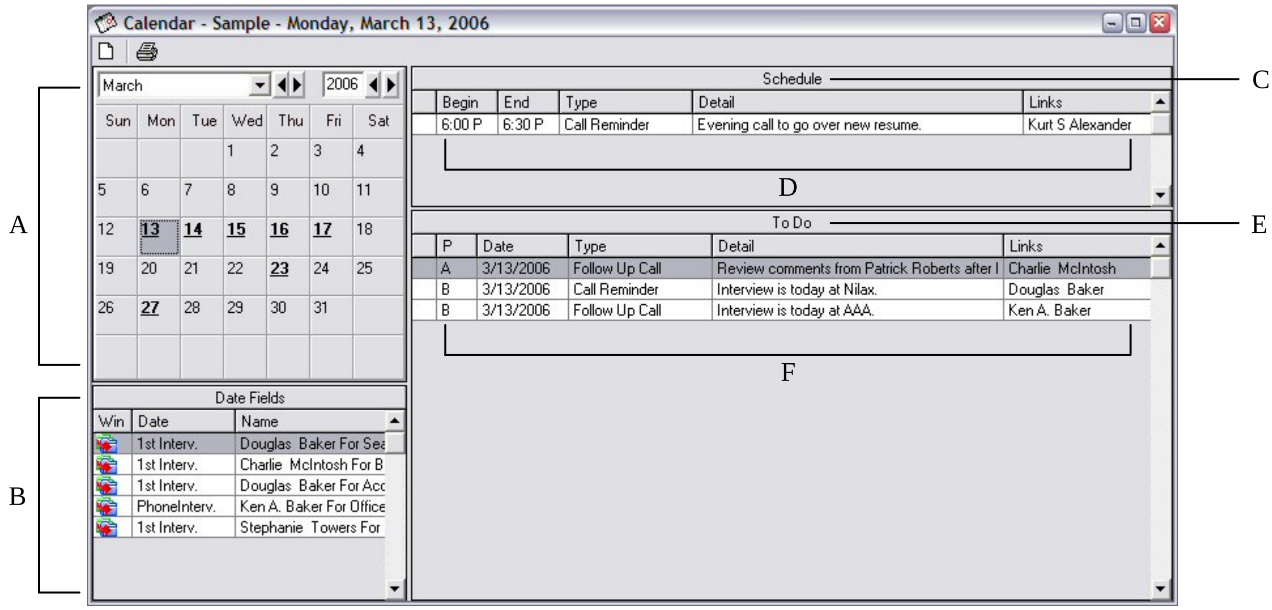
A. This line displays the job title. **B.** A unique Identification number for this job order record can be inserted into this field automatically, when the record is first created. **C.** Jobs can be marked as active or inactive. Inactive jobs still contain valuable historical information, but can be "hidden" from view so as to reduce clutter in certain screens. **D.** The linked customer (or location) record is displayed here. Clicking the folder icon jumps to this record. **E.** The linked contact person record is displayed here. Clicking the folder icon jumps to this record. **F.** This telephone area is usually not used on Job Order screens. **G.** These six date fields can be custom-named, if you wish. **H.** These ten text fields can also be custom-named. They usually contain information about major data items, such as the job location, compensation, "must have" qualifications, "should have" qualifications, compensation, etc. **I.** This section lists any words or phrases that have been selected from a customized master list of keywords that identify the key requirements of this job. **J.** This section lists any candidate records for individuals who have been forwarded to a hiring manager for consideration for this job. The purpose of this section is to show "at-a-glance," all candidates who have ever been considered for this position. **K.** This section can be used to enter items into a calendar that is linked to records in the database. In a network environment, each user of RESUMate can have a private calendar, but a shared, office-wide calendar can also be accessed from each PC on the network. **L.** The purpose of this Memo section is to provide space for open-ended text, such as the full job description, or notes made after phone calls, or questionnaires, or scripts for different types of phone calls. **M.** To assign responsibility for this record to a specific person, click the Set button to select a recruiter's initials from a drop down list displaying all recruiters in an office.

The Job Order Activity Window *(the Professional Version only)*



A. The linked candidate's name is displayed here. Clicking on the blue folder jumps to the full candidate record. **B.** The linked job order is displayed here. Clicking on the green file folder jumps to the full job order record. **C.** These six date fields can be custom named, if you wish. The usually contain major milestone dates, such as the date the resume was forwarded to the hiring manger, the date of a phone interview, a first face-to-face interview, etc. **D.** These sixteen text fields can also be custom named, if you wish. They usually contain summary information about the candidate's progress through the hiring process. **E.** Calendar items specifically relating to this activity screen can be entered here. **F.** Open-ended text, for example summarizing either the candidate's or the hiring manager's comments during the hiring process, can be entered here. **G.** When a Job Order Activity record is first created, the record is marked "Active." If a candidate is later disqualified from further consideration on this job, you can switch the status to "Inactive."

The Calendar *(the Lite and the Professional Versions)*



A. This section displays a month view for the current month. Dates for which entries exist will be displayed in bold type, and underscored. Use the arrows at the top to move to a different month, or a different year. **B.** This section can be filled in automatically with the names of records where date fields in the records themselves match the highlighted date in the month view section above. It is most often used to display interview dates from the job order activity window. **C.** This section is used to display scheduled items that include a reference to a specific time of day, such as an interview, or a promised phone call that has been scheduled for a specific time. Schedule entries are normally created directly from the Calendar Items section in the upper right hand corner of a database record. **D.** Each of the column titles is a button, which can be used to sort the entries into a time or alphabetical sequence, either ascending or descending. **E.** This section is used to display To Do items that do not have a specific time reference. To Do items automatically roll forward into the future until they are marked as "Done." To Do entries are normally created directly from the Calendar Items section in the upper right hand corner of a database record. **F.** Each of the column titles is a button, which can be used to sort the entries into a time or alphabetical sequence, either ascending or descending.