

RESUMate 11

Import Express User's Guide

Introduction:

The best way to think of *Import Express* (in the **Tools | Import Express** menu) is to see it as a true “import” function, similar to the RESUMate Import Wizard, (in the **File | Database | Tools** menu), in that both functions allow you to create multiple database records through a single action.

Import Express creates database records from resumes that have been saved in folders, whether Windows folders or Outlook folders. This function allows you to point to a folder, and then select any number of files in that folder (up to 999 at a time) to be used to create database records.

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IMPORTANT NOTE:

Import Express works best with the “full” Microsoft Outlook program (not Outlook Express) as your e-mail client. With full Outlook, you can see all folders, not just the Inbox folder, and you can also see (and process) file attachments to individual e-mail messages.

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Step-by-Step Instructions

To start the Import Express process, click **Tools | Import Express**. This will open the main Import Express dialog box.

Step 1. Select Source Type

Choose either “Import files from a folder on your disk,” or “Import E-Mail from your E-Mail program” as the source folder type from which resumes are to be imported.

NOTE: Import Express works best with Microsoft Outlook. With Outlook, you can open folders other than the Inbox folder, and you can also see attachments to the original messages. With other e-mail programs, such as Outlook Express, you can see only the Inbox folder, and you cannot see (nor can RESUMate process) any attachments to the original messages.

Step 2. Select Source Files or Messages

Click the “Select Files” button (this will be labeled “Select Messages” if your E-Mail program is the source). Then select individual files or messages within the selected folder by highlighting file names using CTRL-Click, or you can use the sequence Click and then SHIFT-Click to select a range of file names.

Once the files have been selected, click the OK button on the dialog box, and you will be returned to the main Import Express dialog box, where you will now see, in a list presentation on the right side of the screen, all of the file names or message names you have selected.

Step 3. Special Field Mapping

If you have chosen to import files from a folder, select which (if any) of the 6 date fields in the RESUMate candidate record is to be filled in with the original file creation date.

If you have chosen to import e-mail messages from Outlook, first choose whether or not you want to use the message header line as the source for the name and e-mail address fields in the resulting database record.

If you do select this option, you can also type in any number of e-mail addresses (separate them by a semi-colon) that will serve as an exception list for this choice. For example, if you sometimes receive forwarded resumes from other recruiters, you will want to exclude using the message header information from these e-mail addresses as a source of name and e-mail data in any resulting database records.

Next, select which (if any) of the 6 date fields in the RESUMate candidate record is to be filled in with the original message received date.

Finally, select which (if any) of the 6 text fields in the RESUMate candidate record is to be filled in with the subject line of the original e-mail message.

Step 4. Attachment Handling

All RESUMate versions beginning in 2003 allow you to attach external files to database records. One common type of file that is often attached to candidate records is the original resume file (usually a Word doc file). Attaching the file makes it convenient to e-mail the resume to a hiring manager or HR contact at some date in the future, starting the e-mail process right from the candidate's database record.

If you wish to make use of this function, check the box labeled “Save copies of documents as attachments to new records.”

Next, select the folder into which the file is to be copied. (The “Main Attachments Folder” is set in **Tools | Options | Attachments**). Files are always copied, not moved, into the Attachment folder.

If you do not want to “clutter” your main attachments folder with many imported files, you can instead specify a sub-folder within this main folder as the destination folder for the incoming resume. Import Express will remember the name of the sub-folder, and offer to re-use the sub-folder the next time it is run.

Step 5. Source Handling After Import

This option allows you to move (not copy) the source file or e-mail message into a new folder after the file or message has been imported into RESUMate. This will make it easier to keep track of any remaining files or messages in a source folder that has been partially imported into RESUMate using Import Express.

NOTE: You may want to create a "Processed Files" folder before beginning this process. You can then identify this folder as the folder into which files are to be moved from their original location after they have been imported. This will have the effect of "draining" files from the original folder location, so that it will always be easy to see which files still need to be processed, and will also provide an audit trail showing which files have already been imported.

Step 6. Import Records

Next click Begin. The import process will begin, and a progress bar will give an estimate of the expected time to complete the operation. As individual files are converted into RESUMate database records, the Status box for that file name in the list will switch from "Ready", to "Processing", and then "Done".

When all of the records in the list have been processed, a message will be displayed indicating that the Import process is complete. Click OK, and then click the Close button.

Frequently Asked Questions

What is Import Express?

Import Express is an optional feature that is offered on both the Lite and Professional versions of RESUMate. It expands the Automated Data Entry function that has been a part of RESUMate software since the 2002 version, so that ADE can handle multiple resumes in a single action, rather than one resume at a time.

Import Express allows the user to point to a folder full of resumes as the source for automatic record creation, rather than to a particular resume within the folder. Folders selected for import can be Windows folders, or Outlook folders.

The user can select any number of individual files (using CTRL-Click) or the entire folder (using Shift-Click) to be converted automatically into RESUMate candidate records.

Which record formats can be processed by Import Express?

Import Express can process resumes that have been saved in plain text, rtf, or Word doc formats. In terms of e-mails, the resumes can be in the body copy of the e-mail message itself, or can be an attachment to the message.

Does Import Express work with both Outlook and Outlook Express?

Import Express works best with "full" Outlook. To begin with, Import Express can open all folders in Outlook, not just the Inbox folder. If the user has Outlook Express, only the Inbox folder can be seen.

Also, when used with Outlook, Import Express can handle attached files to e-mail messages, as well as the content of the message itself. With Outlook Express, only the e-mail message content can be handled; attachments cannot be handled.

What is the benefit of this feature? What is its intended purpose?

Reducing data entry time when bringing in a volume of records is the obvious benefit of this feature. The underlying assumption, of course, is that the user has one or more Windows or Outlook folders that contain several resumes, all of which would become more useable and valuable if they were integrated into a database.

Resumes that exist only as files in Windows or Outlook folders have limited utility. Converting them into database records unlocks their value as recruiting resources.

How long will it take to import a folder full of resumes?

Obviously, there is no single answer to this question. The two main variables are how many resumes you have selected

to import, as well as the processor speed and memory of the PC that will be running this function.

A common sense observation is that it might not be the best idea to import 1,000 records into your database the first time you use Import Express. You might want to limit the first import to about 50 or so records, just to get a feel for how long it will take, and what some of the issues are.

There's also a lot of feedback on the Import Express screen, so that you can see what's going on, and also see an estimate of the time remaining.

When you're running Import Express, you can't be doing anything else in RESUMate at the same time, but other network users in RESUMate will not be affected by this operation.

What detailed operational questions should I think about before getting started with Import Express?

The best way to think of this feature is to see it as an "import" function, similar to importing records from a file, such as a directory file, that you can view in Excel. In a spreadsheet view of a directory file, you'll see hundreds or thousands of rows, where each row represents one company or person, and each column contains one piece of data, such as first name, last name, phone number, etc.

With Import Express, you'll also be adding a substantial number of records into your database in a single action "in the blind," but the data itself is not nearly so neat as in a directory product, where all the data items are pre-set in identical fields.

Import Express deals with "messy" data, in the sense that it's located in inconsistently formatted documents such as Word doc resumes, or e-mail messages. The next 5 questions deal with some items you'll want to think about, in advance, in order to make sure that the records you bring in using Import Express are clean, high quality records.

What if the name and address data is extracted incorrectly? Won't I just have a lot of "garbage" records in my database?

The automatic extraction of names and addresses that RESUMate performs when creating a database record from a text resume such as a Word doc file, will never be 100% accurate.

In fact, our experience to date with the Automated Data Entry feature (the one-record-at-a-time version of Import Express that we have been offering for over a year now) is that the name and address extraction is probably correct about 75-80% of the time. This means that in a fully automated context, in which hundreds or thousands of resumes are being converted into database records in a single "blind" action, a large number of records will be created which we know, in advance, will have incorrect data in the name and address field. What's the significance of this?

To the extent that creating searchable records is the goal, the fact that the name or address in the field portion of the resulting database record may not be correct is not really that significant. You can search the keywords and phrases that were automatically extracted during the import process, and of course, you can also search the full text of the resume itself. (If you're not familiar with RESUMate, the full text of the resume is saved in a "Memo window" called "Resume") The correct name and address can always be seen in the Memo window copy of the resume, and if a record has been found in a search, and is now of recruiting interest, it will take just a few mouse clicks (and no typing) to "fix" the incorrect name and/or address information in the field portion of the record.

Another important point is that Import Express will "mark" all database records that it creates, and that have therefore not yet been seen by a human being, by placing a question mark symbol (?) as the first character of the last name field. A good choice might be an asterisk or the question mark symbol.

The result of this will be that in any alphabetical listing of the database, all of the records that have been created using the Import Express feature will appear at the top of the list. (Special symbols, like the question mark, sort "high" in the ASCII character set sort sequence, so records resulting from Import Express will always appear at the top of any list that is sorted in alphabetical sequence by last name). Once a record has been viewed and its accuracy confirmed by a human being, the special question mark symbol can be removed, and the record will take its place in the normal alphabetical sequence of the database.

Can I use information from the e-mail message header (the e-mail address and the name of the e-mail sender) to be used as the name and e-mail address fields in the resulting RESUMate record?

Yes, Import Express gives you this option. This is sometimes, but not always, a good idea. If an e-mail message has been received directly from a candidate, then this is probably a good system. Candidates don't always include their e-mail address in the resume, so this is a good place to grab this information. The name is also more reliably taken from here, than from an attempt to find the first name and last name from the body copy of the resume.

On the negative side, the e-mail address may be a work e-mail, which the sender would prefer not to be used for recruiting purposes. Also, work e-mail addresses cease to have value if the candidate leaves that company. A personal e-mail address is usually preferable.

Another negative of including the sending e-mail address in the database record itself derives from the fact that a recruiter may receive an on-going volume of e-mails from a fellow recruiter, so any forwarded resumes would result in the referring recruiter's e-mail address going into the candidate's record using this system.

To deal with this latter issue, Import Express allows you to create an "exclusion list" of e-mail addresses, so even if you turn this feature on, all e-mails from the exclusion list will be ignored, and the name, address, and e-mail data will be taken from the resume itself.

What date information should I use to set the "Date Acquired" or "Date Entered" field in the RESUMate database record?

Your choices are:

- Today's date, i.e. the date that you actually do the import function
- The file creation date, in the case of files in a Windows folder
- The date the original e-mail was received, in the case of an Outlook folder

Will Import Express move or copy the files that it uses to create database records to new folder locations? What file "housekeeping" issues are being handled here?

There are two separate issues:

One deals with the automatic creation of an internal link between the new candidate record and the file (usually a Word doc file) that contains the original resume.

The other deals with an "audit trail" issue. If I have either a Windows or an Outlook folder full of resumes, and I import only a portion of the total items in the folder, how can I keep track of which items have been processed, and which have not?

To deal with the first issue, a little background is necessary. Since 2003, RESUMate allows up to ten "links" to be created between a database record and an external file. This external file can be any type of file, whether a text file such as a Word doc file, or an image file, or a spreadsheet file, or an Adobe Acrobat file, etc.

For candidate records, one such link will usually point to the file that contains the original resume, usually in a Word doc format. In a sense, this file attachment feature allows the database record to function as a "hub," connected by spokes (the file attachment links) to all other files on a PC or server that are logically related to this record.

In order to make this file attachment feature more convenient (and automatic) to use, RESUMate allows a "default" Attachment Folder to be created. This default folder is established in **Tools | Options** on the tab labeled "Attachments."

Once this default Attachment Folder has been set, whenever a new record is being added to the RESUMate database, either one-at-a-time through the Automated Data Entry function, or in a group, using Import Express, the original resume file will be copied automatically into this designated attachment folder.

A paperclip icon at the top of the candidate record then allows this attached file to be opened for editing, or e-mailed.

NOTE: With regard to records that are created from Outlook folders, Import Express will save as files in the designated Attachment folder only those files (usually Word doc files) that were attached to the original e-mail messages.

If the resume coming in from the e-mail message is not an attachment, but is contained in the body copy of the e-mail

message itself, then no file will be created in the Attachment Folder. The information in the message will be used to create the fields in the RESUMate database record, and the entire message will be saved in the RESUMate Memo window called "Resume," but no external file will be created as a result of this transaction.

With regard to the "audit trail" issue, Import Express allows files or messages to be moved (not copied, but moved) to a new folder location after they have been used to create new candidate records. Windows files can be moved to a new Windows folder location, and Outlook messages can be moved to a new Outlook folder location. The effect is to allow the original folder to be "emptied out" as a result of an import action, and a designated receiving folder to be "filled up" as a result of this same action.

NOTE: If a file is moved or copied to a new location, then it may be necessary to modify the file name, in the event that this file name already exists in the destination folder. If the file name needs to be changed, Import Express will attach a date and time suffix to the original file name in order to make the file name unique.

How can I make sure that duplicate records are not being created in my database as a result of Import Express?

Obviously, when hundreds of records are being imported into the RESUMate database in a single action, there is the possibility that an incoming record is a duplicate of a record already in the database.

There are a number of issues here. In essence, a duplicate record means a record that refers to the same individual, but the content of the two (or more) records may in fact be very different. One record may contain up-to-date phone notes, while another record may contain a more up-to-date resume. There is no way of knowing, in advance, how to blend these two (or more) records into a single, optimal record.

There is the added problem that a record coming in from Import Express may have had the name and/or address incorrectly extracted, so attempting to identify duplicate records based on name or address data will not be reliable during the import process.

To deal with these issues, a new duplicate checking function was added to RESUMate in 2003 along with the release of Import Express. You'll find the duplicate checking function in the **File | Database | Tools** menu. This duplicate checking function will allow records to be identified (automatically) as duplicates, based on phone, e-mail address, and/or name and address components.

It is recommended that after importing records using Import Express, this duplicate checking function be used to detect duplicate records in the database, after which duplicated records can be deleted or blended, based on a reading of the content of the records themselves.