

RESUMate 11

RESUMate Manager User's Guide

Introduction:

RESUMate Manager is a report writing program that extracts data directly out of a RESUMate database. Its purpose is to create "single-click" management reports, covering a variety of topics.

RESUMate Manager's reports fall into three broad categories or styles: (1) the Status Report; (2) various Activity Reports, and (3) various Summary reports.

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Three Categories of Reports

RESUMate Manager creates 3 distinct report types. The one-click reports created by RESUMate Manager can be grouped into three distinct categories: (1) a Status Report that lists open jobs and the candidates under active consideration for those jobs; (2) an Activity Report that summarizes lists of transactions such as interviews; and (3) a Summary report that summarizes on a single page the metrics (in transactions and dollars) that describe an individual recruiter's performance during any time period.

The Status Report

This report answers the question: What is the status of all "open" jobs? The Status Report lists all open jobs. If candidates have been submitted on the job, then active candidates, along with key date information, will be listed immediately under the main reference line for the job. (You can include "inactive" candidates (i.e. submitted candidates who are no longer under consideration) in the list if you choose to, but most likely you will want to restrict this report to active candidates only.

Various Activity Reports

Activity Reports can be custom-tailored to serve specific purposes. In general, activity reports isolate job order and job order activity records based on one or more dates that fall within some time period. Some examples are:

- **A Follow Up Report:** Answers the question: what interviews happened recently (yesterday, or last week, or for any other time period), and need follow up?
- **A Preparation Report:** Answers the question: what interviews are about to happen (today, or tomorrow, or for the rest of the week,) and need preparation?

Summary Reports

This report style assembles counts of job order and job order activity records, again based on dates that fall within some specified time period. Counts can be viewed for such things as orders entered, submittals made, phone interviews, face-to-face interviews, offers, and placements.

If money amounts and fee percentages have been entered on Job Order and Job Order Activity records, then average salary and fee, as well as total fees generated within some time period, can also be reported.

Four Basic Concepts

RESUMate Manager is based on a few simple ideas. If you understand these basic concepts at the outset, it will be very easy to set up and use this program.

RESUMate Manager will use up to 7 data items from the Job Order Screen, and up to 10 data items from the Job Order Activity Screen to prepare its reports.

Some of these data items are optional, but most are not. The items are:

From the Job Order Screen:

1. Company name
2. Job title
3. Recruiter's name or initials (the recruiter responsible for the job order)
4. Job order date received
5. Salary

6. Fee % (or a flat fee amount)
7. Notes

From the Job Order Activity Screen:

1. Submittal Date
2. Phone Interview Date
3. First Interview Date
4. Second Interview Date
5. Offer Date
6. Acceptance Date
7. Start Date
8. First Year Compensation
9. Final Fee% (or fixed fee amount)
10. Notes

It is likely that you already have most, if not all, of these data items in your Job Order and Job Order Activity records. If you do not, you may want to modify your RESUMate screen layouts (**File | Database | Tools | Settings**) to make room for these items.

RESUMate Manager needs to know which Job Order records reflect “Open” jobs.

There are a number of ways to indicate in a RESUMate Job Order record whether or not the record reflects an “Open” job.

If you are using RESUMate 2006, RESUMate 10, or RESUMate 11, you'll want to use the “Active” and “Inactive” radio buttons that appear in the upper left hand corner of the Job Order screen.

If you are using a version earlier than 2006, there are three other methods that you can use to indicate that a job is still open.

The simplest may be to have an entry called “Open” or “Active” in some column in the Valid Table. When this entry has been selected for a particular Job Order record, then this job can be considered “Open.”

A negative variation of this method may be to have an entry called “Closed” in some column of the Valid Table. As long as this entry has NOT been selected for a particular Job Order record, then this job can be considered “Open.”

Another “negative” method can be based on a date field. As long as a specific date field (presumably a date field labeled “Closed,” or some other word with this same meaning) does NOT contain data, then the job can be considered “Open.”

One (and only one) of these methods must be used in your RESUMate database, and then identified in a *RESUMate Manager* set up screen, so that *RESUMate Manager* can isolate Job Order records to be included in the Status Report.

RESUMate Manager (optionally) needs to know which recruiter is responsible for a Job Order.

There are a number of ways to indicate in a RESUMate Job Order record which recruiter is responsible for this particular job.

If you are using RESUMate 2006, RESUMate 10, or RESUMate 11, a dedicated recruiter field is provided in the upper left hand corner of the job order record view. (Clicking the “Set” button next to this field allows you to select a recruiter's initials from a dropdown list that is created in **File | Database | Tools | Recruiter Maintenance**).

If you are using a version earlier than 2006, recruiter names or initials can be assigned to a Job Order record (1) in a Valid Table column, (2) in one of the text fields that appear on the right hand side of the Job Order screen, or (3) as a prefix or suffix in the ID field of the record.

If recruiter names or initials are contained in a text field or as a prefix or suffix in the ID field, they can occur anywhere in the text field or ID field, i.e. they do not need to appear at the left margin of the field, or as either a prefix or a suffix. As long as the name or initials appear anywhere in the field, they can be used by *RESUMate Manager* to assign the Job Order record to a recruiter.

One (and only one) of these methods must be used in your RESUMate database, and then identified in a *RESUMate Manager* set up screen, so that *RESUMate Manager* can assign Job Order records to a particular recruiter.

RESUMate Manager (optionally) needs to know which submitted candidates on a job are still active.

The Status Report lists all open jobs, and then lists all active candidates on these jobs. Here, a distinction is being made between “active” candidates and “submitted” candidates.

It may be desirable to see on the report only those candidates who are in fact actively under consideration, which is to say that if a candidate was submitted on the job, but for whatever reason has been eliminated from active consideration, then this candidate should also be eliminated from the Status Report.

A *RESUMate Manager* set up screen allows you to specify a field in the Job Order Activity window, and optionally a word or phrase, such as “inactive,” or “dead,” which will be used to eliminate submitted candidates from the Status Report.

If you are using RESUMate 2006, RESUMate 10, or RESUMate 11, you'll want to use the “Active” and “Inactive” radio buttons that appear in the upper left hand corner of the Job Order Activity screen, just above the candidate's name.

How to Use RESUMate Manager

First, select the database file from which the reports are to be extracted.

In the File menu, select “Open RESUMate File.” This will present a standard “Open” dialog box, which will allow you to select the particular database file (the .rdb file name) from which *RESUMate Manager* will extract reports.

Next, use the “Set Field Locations” item in the File menu to describe your database.

1. First, on the Job Order tab, “map” the custom field names from your RESUMate Job Order and Job Order Activity windows into the corresponding logical field names that are used in *RESUMate Manager*.
2. Then indicate how job orders are to be recognized as “Active” in your database.
3. Then indicate how job orders are assigned to individual recruiters in your database (*assuming you want to break out Activity and Summary reports by recruiter*).
4. Finally, on the Job Order Activity tab, indicate how submitted candidates can be recognized as no longer active on a particular job order (*assuming you want to eliminate from the Status Report candidates who are no longer active*).

There are two tabs in the Set Field Location dialog box. One deals with the Job Order Window, and the other with the Job Order Activity Window.

The Job Order Tab

On the Job Order tab, a two-column table in the lower right-hand corner of the screen allows you to enter the recruiters' names as you wish them to appear on the reports, along with the corresponding character string that has been used to identify the recruiter in the RESUMate Valid Table, or in the Job Order text field, or in the ID field.

This two-column table must be completed if you want to sort any reports in recruiter sequence. There's no need to spell out the name in full in the left-hand column; you can stay with initials, or first names only, but whatever notation system you use in this column will determine how the recruiter is identified in the reports. The right hand column is used as a match pattern to be compared to the data that actually resides in the database records.

It will be important to keep this list up to date. If records occur in the database that contain recruiter names or initials that do not appear in this list, and these records would otherwise be included in a selected report, they will be omitted from the report, and treated as exceptions (and listed on an exception report).

The remaining functions on the Job Order tab deal with mapping the custom field labels from your RESUMate file into the corresponding logical field labels used in *RESUMate Manager*, as well as determining the method *RESUMate Manager* will use to recognize open job orders and also to assign a job order record to a particular recruiter.

The Job Order Activity Tab

On the Job Order Activity tab, two boxes in the upper left hand side of the screen are used to indicate how candidates who have been submitted on a job are to be recognized as no longer active.

If you are using RESUMate 2006, RESUMate 10, or RESUMate 11, you'll want to select the "Active Status" item in the top box.

If you are using a RESUMate version earlier than 2006, select any one of the six date fields or sixteen text fields that will also appear in the drop down list associated with this top box.

In the event a text field has been selected, the bottom box allows a word or phrase to be specified that marks a candidate as no longer active. For example, the word "inactive" or "dead" in a text field labeled "Notes" can serve as an indicator to *RESUMate Manager* that this candidate, although still linked in the database to the Job Order record, is no longer to be included in the Status Report.

If a text field is selected in the top box, and no words or phrases have been entered in the lower box, then the mere presence of any data in the field will serve as the marker to *RESUMate Manager* to exclude this record.

The remaining function on the Job Order Activity tab deals with mapping the custom field labels from your RESUMate file into the corresponding logical field labels used in *RESUMate Manager*.

Once your file has been described to RESUMate Manager, you're ready to print any of the pre-defined reports, or use the "Report" menu to modify these reports, or design reports of your own.

There are three basic report styles:

1. A Status Report lists all open job orders, and then lists all active candidates who have been submitted on each open job.
2. Activity Reports can be designed for any number of specific purposes. Two common purposes will be to list all recent interviews (to know which follow-up calls need to be made) and all upcoming interviews (to know which preparation calls need to be made).
3. Summary Reports compile counts of events into meaningful summaries, and can compare counts from one time period to another. Counts can include number of new orders entered, number of submittals, number of phone interviews, face-to-face interviews, offers, and acceptances.

The style of the report determines which design information you need to provide.

The Status Report

For the Status Report, you need only specify whether the report is to be sorted by company name, or by recruiter. If you do choose to sort it by recruiter, you can also specify that each recruiter's job order list begin at the top of a new page.

A check box on the Set Up screen allows you to "Hide Inactive Candidates." If this box is checked, then candidates marked as inactive will be excluded from the Status Report. If this box is not checked, then all submitted candidates, both active and inactive, will be listed on the report.

The Activity Report

For an Activity Report, there are three additional items that you need to specify.

First, in the "Dates to Filter On" section, you need to specify the date fields that will determine which records will be included in the report. You can choose one date field, or more than one date field. For example, you can choose a report that lists ALL interviews, i.e. both phone interviews as well as face-to-face interviews. Or, you can choose to limit the report to include phone interview dates, or first face-to-face interview dates, or second interview dates only.

Second, in the "Date Range" section, you need to specify the time period you're interested in. You can choose from a list of pre-set time periods (last week, this week, next week, etc.) or you can specify some other (custom) date range that may be of interest.

Finally, in the "Report Title" section, you need to specify a title for the report you have specified, such as "Last Week's Interviews." This would be an appropriate title for a report that selected "Phone Interview," "First Interview," and "Second Interview" in the "Dates to Filter On" section, and then selected "Last Week" in the "Date Range" section.

A number of commonly used report titles have been pre-designed for you, but you can add custom reports of your own design, or modify any of the reports that have been included with the program.

The Summary Report

The Summary Report set up is the same as for an Activity Report with one addition. If you wish to compare two time periods (e.g. orders entered this year-to-date vs. the comparable period last year), you must specify the comparison date range.

You can create a report at any time simply by clicking on its title. Your report will reflect the data in your files at the moment you select it.

Once these set up operations have been completed, you can create reports at any time simply by opening *RESUMate Manager*, and then "double-clicking" on one of the report titles that appear in the Select Report box in the upper left-hand corner of the screen (or by highlighting the title and clicking the "Create Report" button).

A progress bar at the bottom of the screen tracks the process of extracting the raw data from your rdb file that will be used to create the report. In most cases, this process will take just a few seconds, but if your database is very large, (and your PC is old), this could take a minute or two. As soon as the data has been extracted, the report will be created, and the first page will be presented on your screen.

Exception Reporting

If records were extracted from your file, based on the criteria specified in the report set up screen, and for any reason one or more records contain inconsistent data such that they cannot be used to prepare the report, they will be listed in an Exception Report.

The Exception Report is presented immediately, i.e. before the first page of the report itself is presented. It lists the inconsistent records, along with an explanation of the inconsistency that was detected. For example, if a Job Order record would otherwise appear on the Status Report, but no recruiter's name or initials appear in the Job Order record, then this record would be listed on the Exception Report.

You can go back to RESUMate itself and correct the offending record, (and then click again on the report title in *RESUMate Manager* to re-create the report), or you can by-pass the exception report and go ahead and look at the report itself. Even if you choose to by-pass the exception report, you can go back to it at any time, simply by selecting the "View Exceptions" item in the Report Menu.

Updating a Report to Reflect Current Data

RESUMate Manager uses the data that exists in your RESUMate file at the exact time you select the report. You can "update" a report at any time, simply by double-clicking on the report title that appears in the Select Report box on the main *RESUMate Manager* screen. The new report will reflect changes or additions to the Job Order and Job Order Activity screens made by any user on the network right up to the moment that you click the report title.