

RESUMate 17

Getting Started Guide

This document is intended to help people who are new to RESUMate get off to a good start. It covers four main topics:

- I. How to convert text resumes into RESUMate database records
- II. How to customize your database so it meets your specific information needs
- III. How to search your database to find candidates suitable for any position
- IV. How to track send outs and candidate progress through the hiring process

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Basic Controls and Screenmap

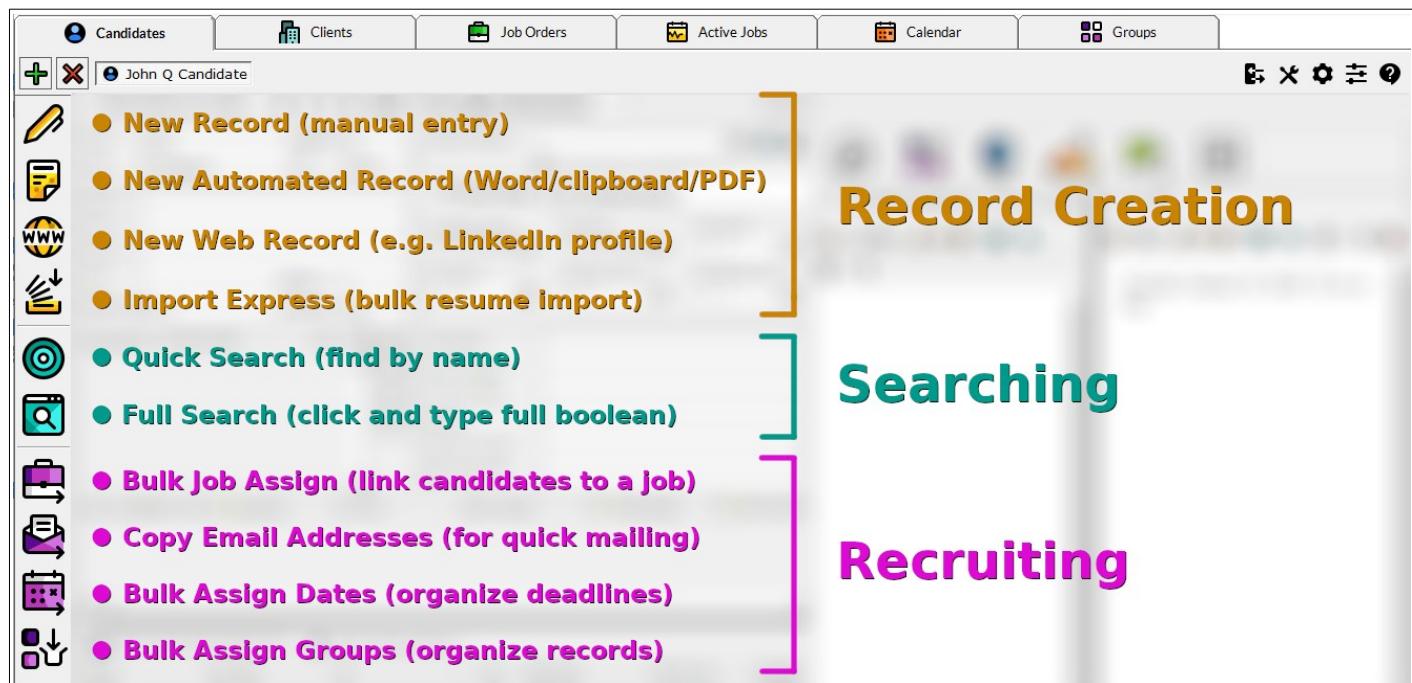
The top of the RESUMate screen is divided into six “navigation” tabs. RESUMate will switch between tabs automatically when appropriate, but you can also switch manually by clicking a tab:



The three tabs on the left (**Candidate**, **Client**, and **Job Order**) display your database records. Click those to view, edit, add, or delete records of each type.

The three tabs on the right (**Active Jobs**, **Calendar**, and **Groups**) are recruiting tools that organize and display information from the database records.

Underneath the navigation tabs is a stack of colored icons running down the left side of the screen, this is the database toolbar. Tools are grouped by color and function: **Record Creation**, **Searching**, and **Recruiting**. Please note that since screens change depending on the selected tab (Candidates, Calendar, etc) some icons will be grayed out depending on which tab is currently active.



RESUMate contains a lot of screens and tools, but the basic navigation is always very simple: 1) change screens with the tabs at the top, and 2) modify and search your database with the icon stack on the left.

ADDITIONAL DOCUMENTATION: The built in RESUMate Help System contains guides to every screen and icon in the program.

Push the F1 key on your keyboard (or click **Help** or **?** buttons) for an illustrated guide to any screen or tool in the program.

Part I: Converting Resumes Into Database Records

Text resumes can be converted into database records with just a few clicks. The complete process usually takes 10 seconds from start to finish. Resumes can be in any text format:

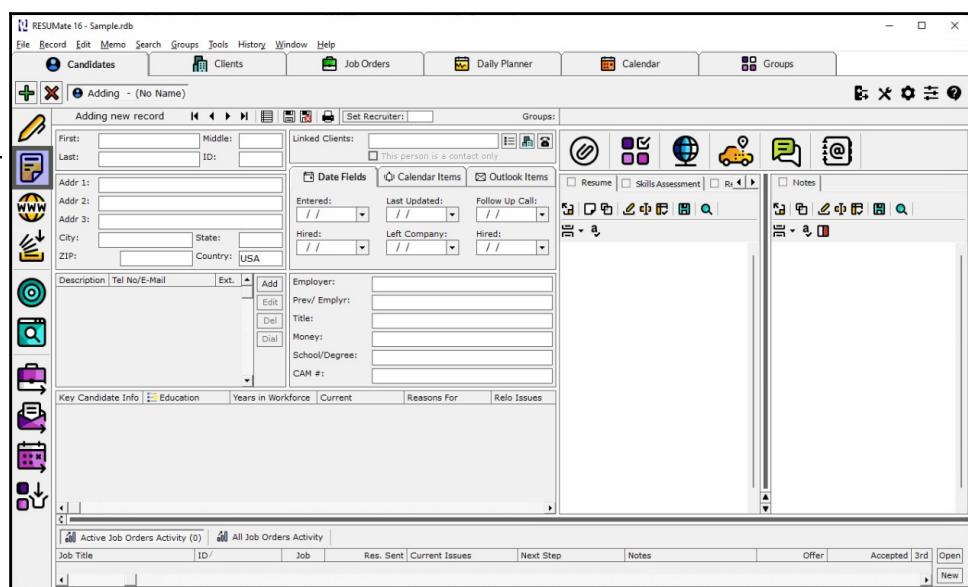
This includes:

- (1) Word [.doc or .docx] files
- (2) Adobe [.pdf] files
- (3) E-mail messages
- (4) LinkedIn profiles
- (5) Any other text that can be copied and pasted

1.

This is the first screen you will see when the program starts. It is currently empty and contains no records.

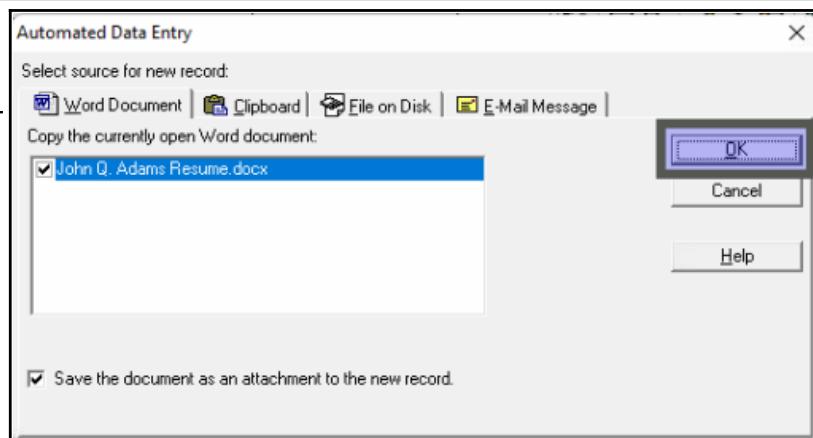
*Clicking the highlighted **Automated Data Entry (ADE)** icon will use a text resume to create a new database record.*



2.

The ADE window will open. The tabs along the top allow you to choose the source resume for the new record.

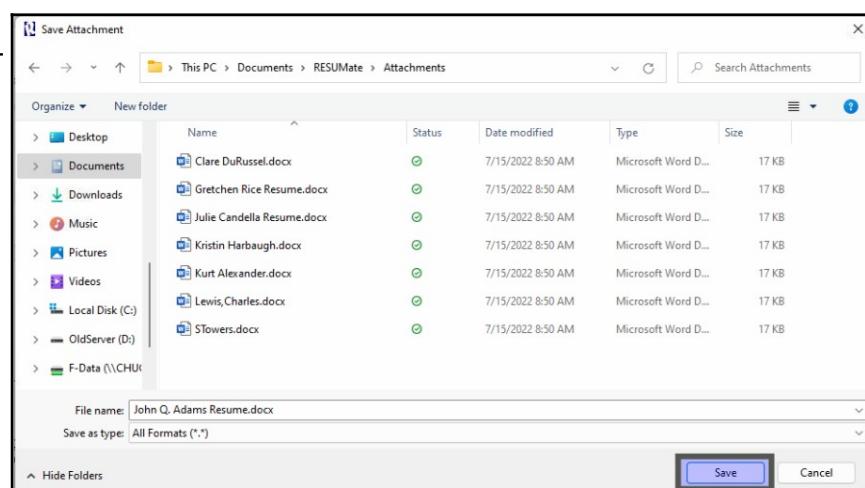
*In this example we're using a .docx file that is currently open in Word. Once you've selected a resume, click the **OK** button.*



3.

If your source is a file (.docx, .pdf, etc.), a Save Attachment window will open.

*Click **Save** to store a copy of the original file for later e-mailing and reference.*



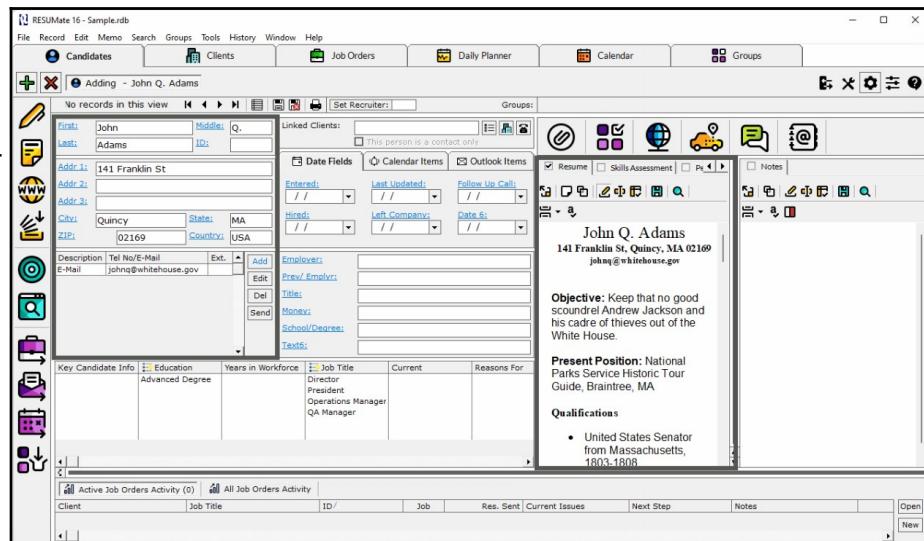
CONVERTING RESUMES INTO DATABASE RECORDS (CONTINUED...)

4.

Once the resume has been selected, RESUMate will return to the main record screen.

The candidate's name, address, and contact information will be automatically extracted into the fields on the left.

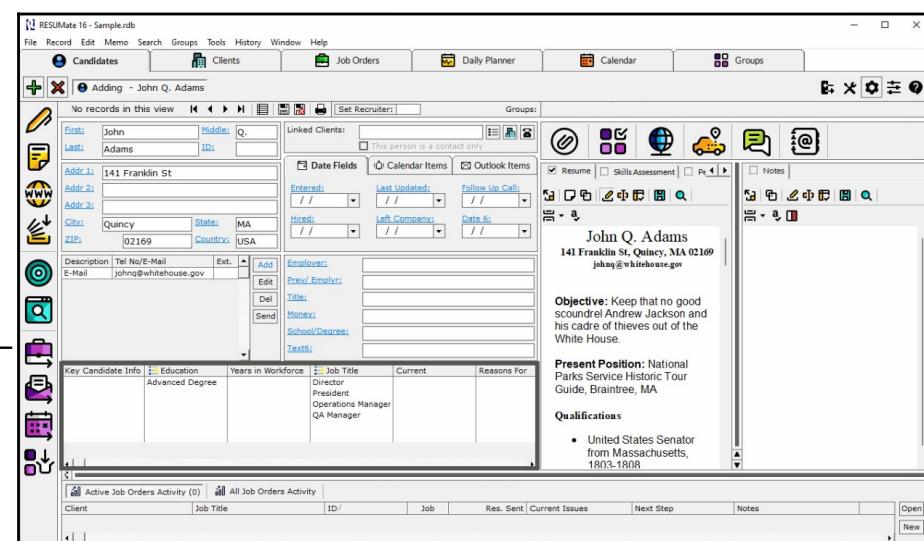
The text of the resume will be displayed on the right side.



5.

Automatically matched Keywords are displayed in columns (box at right).

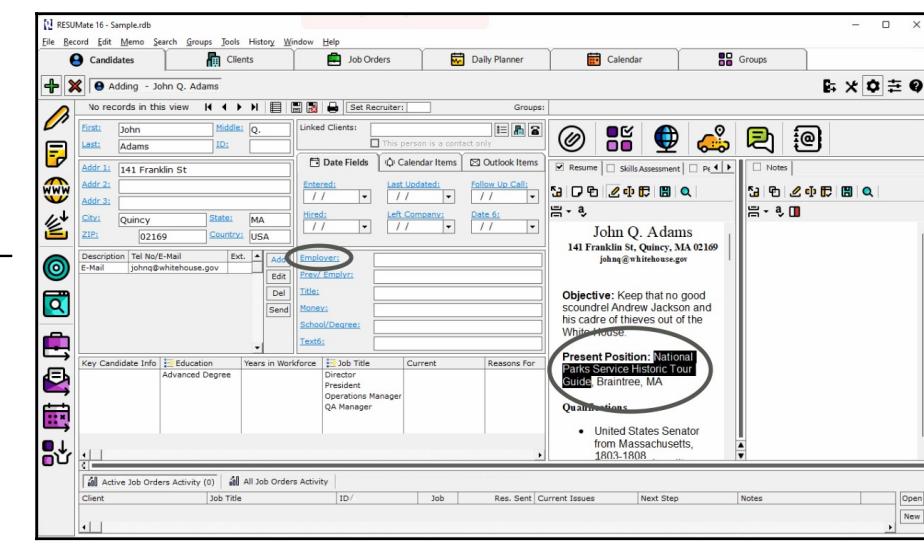
The list of keywords is fully customizable and explained in the next section of this document.



6.

Optionally, you can highlight text from the resume and click a field to populate it. In this example, "National Parks Service Tour Guide" has been highlighted in the resume.

Clicking the circled Employer field will automatically paste that information into the field.

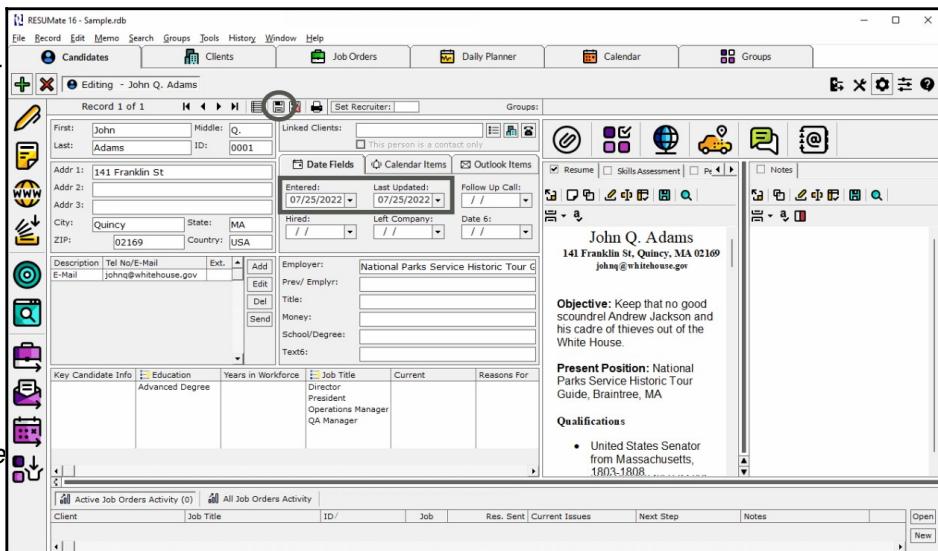


CONVERTING RESUMES INTO DATABASE RECORDS (CONTINUED...)

7.

Once you are satisfied that all of the information appears correctly, click the **Save Icon** (circled at right) to write the record to the database. As soon as you click to save, the record will be visible to any other users.

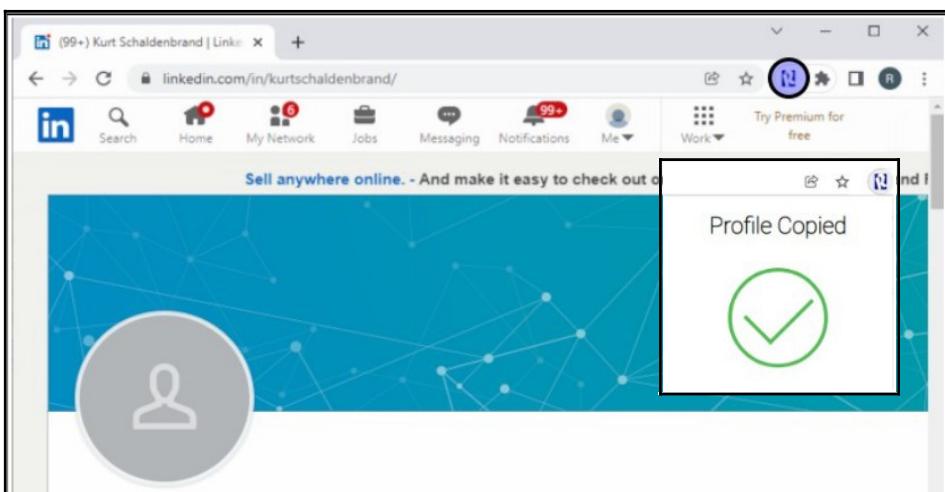
By default, two dates will be automatically recorded (box at right). **Entered** will store the date this record was created. **Last Update** will store that last date any changes were made.



Converting LinkedIn Profiles to Database Records

1.

First, open someone's profile on LinkedIn in Chrome or Edge. Then, click the blue 'R' icon (circled at right). You will see a confirmation message reading "Profile Copied".



2.



Once the profile is copied, switch back to RESUMate and click the "WWW" icon. That's it. The profile will be automatically loaded and is ready to be saved.

Note: If your copy of Google Chrome or Microsoft Edge does not have a RESUMate 'R' icon, please see the RESUMate 16 Installation Guide for instructions on installing the RESUMate Web Profile extension.

ADDITIONAL DOCUMENTATION: When the Automated Data Entry window is open on your screen, simply push the F1 key on your keyboard for a complete discussion of what each tab (Word, File on Disk, Clipboard, E-Mail) does.

Part II: Customizing Your Database

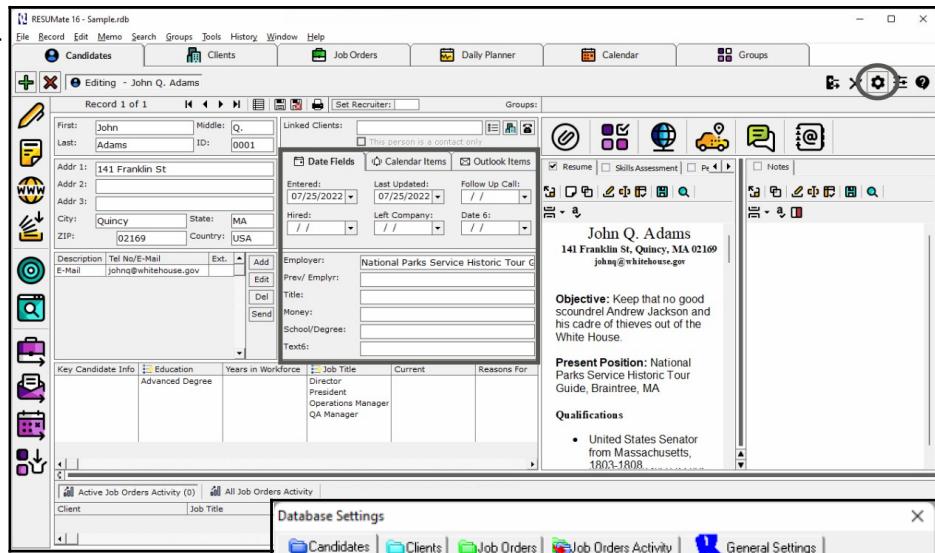
With a few clicks, RESUMate will look as though it was custom-developed just for you. There are two basic steps to customizing your database: (1) re-naming the date and text fields to reflect your preferences, and (2) setting up a list of keywords and phrases that will be automatically extracted from incoming resumes.

CUSTOMIZING YOUR DATABASE, STEP 1: NAMING DATE AND TEXT FIELDS

1.

Date and text fields are shown in the boxed area at right. In this example we're going to rename the field currently labeled 'Text6'.

First, click the **Customize** icon in the upper right (circled at right) and select *Customize the Database*.

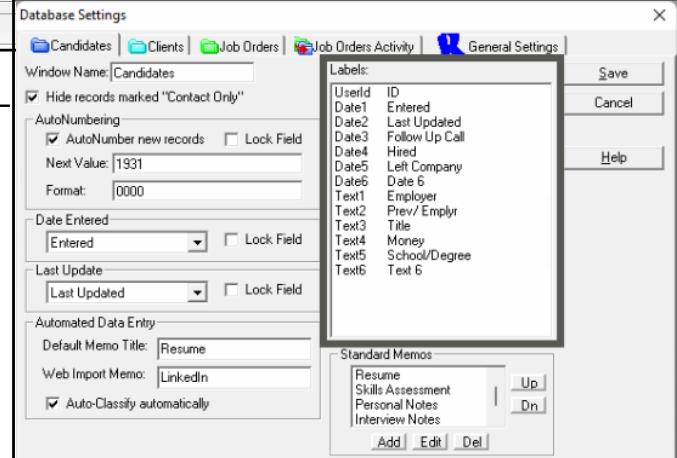


2.

The Database Settings window will open. The date and text fields are listed in the Labels box. Double click the field you wish to re-name ('Text6' in this example).

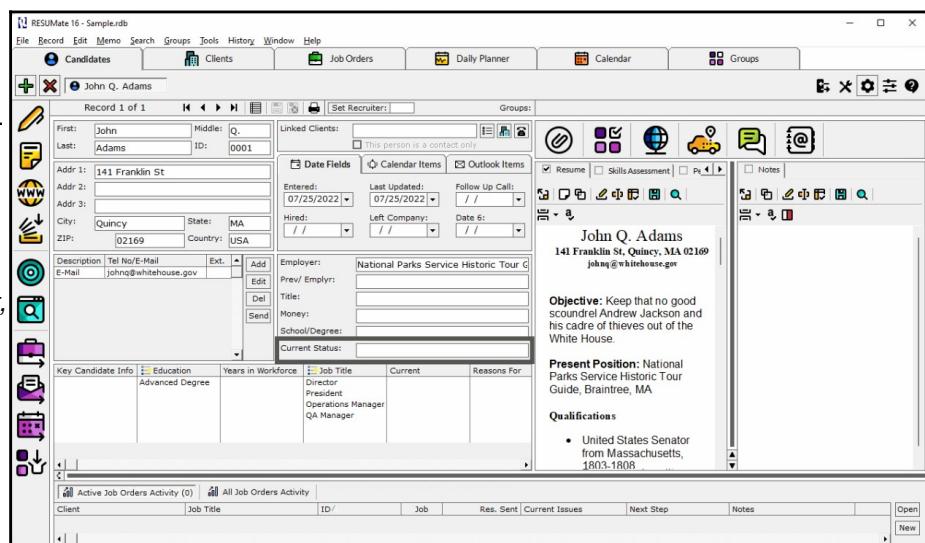
3.

An Edit Label window will open. Type 'Current Status' into the box and click the **OK** button. Then click the **Save** button on the Database Settings window.



4.

The "Text6" field has now been renamed. You can use the same steps to rename all the date and text fields on the Candidate, Client, Job Order, and Job Order Activity windows in RESUMate.



CUSTOMIZING YOUR DATABASE, STEP 2: SETTING UP A LIST OF KEYWORDS AND PHRASES

RESUMate keeps a list of keywords and phrases called the Valid Table. The table is divided into columns for easy organization. Keywords in **Automatic** columns will be automatically matched and highlighted on all new records. Keywords in **Manual** columns act as checklists, allowing you to manually select items as they apply to individual candidates (e.g. "Willing to Relocate", "Ready to Hire").

1.

Both Automatic and Manual columns are displayed in the boxed area at right.

Automatic columns (Job Title and Education at right) are marked with this blue list icon.

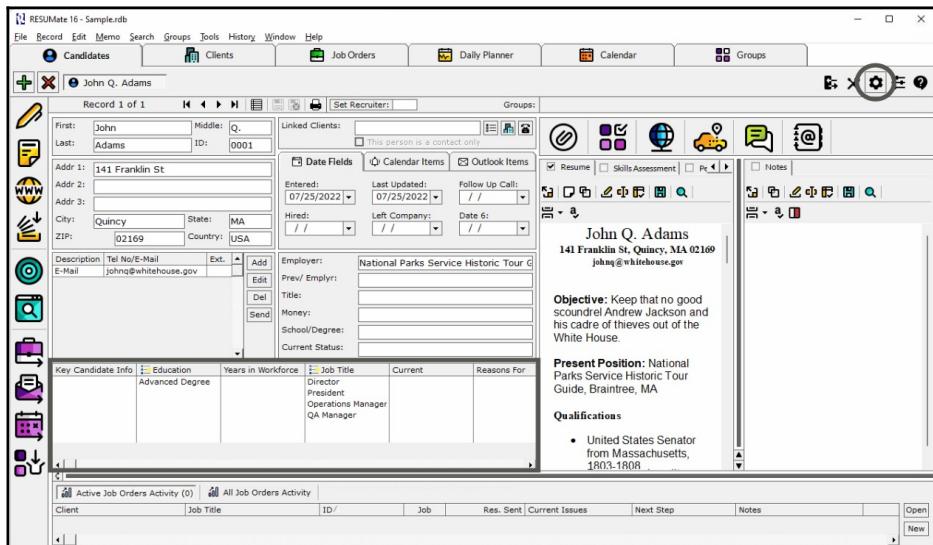
Manual columns (Key Candidate Info, Years In Workforce) do not have the blue list icon.

To customize the Valid



Table, click the **Customize**

icon in the upper right again, but this time select *Customize the Keyword Table*.



2.

The Valid Table Editor window will open. From this screen you can add new columns as well as edit or remove existing columns.

Double click the Job Title column to open it.

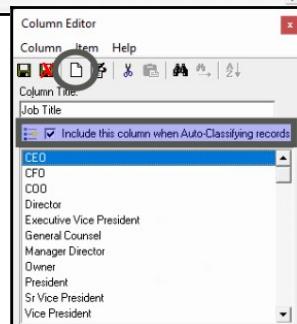
Key Candidate Info	Education	Job Func/Title	Years in Workforce	Relo Issues	Reasons For Leaving
High School	CEO	2022	Will need help	Bad Chemistry	
RANKING	G.E.D.	CFO	2021	Does not need help	Bored
.....	Associates Degree	COO	2020	.....	Broken Promises
A-Level Candidate	Bachelors Degree	Director	2019	No Relo	Commission Cut
B-Level Candidate	Advanced Degree	Executive Vice President	2018	Open to Relo	Downsized
C-Level Candidate	.....	General Counsel	2017	.....	Feed
Good to Hire	BS Engineering	Manager Director	2016	SouthEast	Growth limited
Questionable	.....	Owner	2015	AL	Heavy Travel
Do Not Use	BS Aerospace Eng	President	2014	AR	Mary Changes
.....	BS Biomedical Eng	Sr Vice President	2013	FL	Outdated Product
SOURCE	BS Chemical Eng	Vice President	2012	GA	Overpriced
.....	BS Civil Eng	.....	2011	KY	Passed Over
Monster	BS Ceramic Eng	Management Function	2010	LA	Philosophy
Career Builder	BS Computer Eng	.....	2009	MS	Poor Delivery
HotJobs	BS CIS	Business Unit Mgr	2008	NC	Poor Manager
The Ladders	BS Construction Manag	Dept Manager	2007	SC	Poor Support
Linked In	BS Comp Science	Eng Manager	2006	TN	.....
Other Internet	BS Electrical Eng	VP of Eng	2005	VA	.....
Newspaper	BS EET	Facility Manager	2004	WV	.....
Workopolis	BS Electronic Eng	Facility Supervisor	2003	NorthEast	.....
Referral	BS Envir Eng	General Manager	2002	CT	.....
.....	BS Industrial Design	Group Manager	2001	DE	.....
CITIZENSHIP	BS Industrial Eng	Maint Director	2000	ME	.....
USA	BS Ind Technology	VP Program Manager	1999	MD	.....
Canada	BS Info Technology	Maint Mgr	1998	MA	.....
Mexico	BS Eng Management	VP Maint	1997	NH	.....
Authorized to work:	BS Marine Eng	Mgr Director	1996	NJ	.....
.....	BS Materials Eng	Mgr Manager	1995	NY	.....
COMPENSATION	BS Mathematics	Project Manager	1994	PA	.....
Under 100K	BS Mech Eng	R&D Manager	1993	RI	.....
Under 150K	BS Mechanics	VP Mgr	1992	VT	.....
Under 200K	BS MET	Operations Manager	1991	SouthWest	.....
Under 250K	BS Metallurgy	Dir of Operations	1990	AZ	.....
Higher than:	BS Mfg Eng	VP Operations	1989	NM	.....

3.

The Column Editor will open. This window allows you to add new keywords as well as edit or remove existing keywords.

If the "Include this column when Auto-Classifying records" checkbox is checked (highlighted at right), the column is Automatic. If un-checked, the column is Manual.

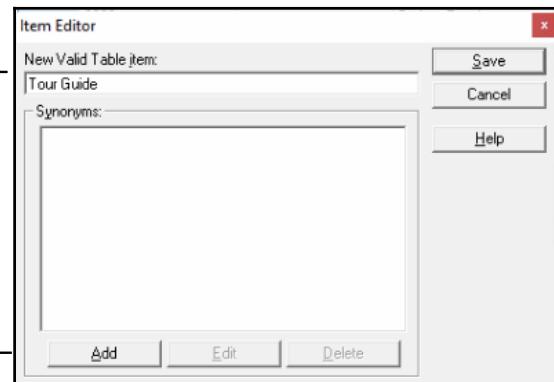
To edit an existing keyword, double click it. To create a new keyword, click the **New** icon (circled at right).



CUSTOMIZING, STEP 2: SETTING UP A LIST OF KEYWORDS AND PHRASES (CONTINUED...)

4.

When you click to create a new keyword, an *Item Editor* window will open. You can type in any keyword you want, in this example we've entered "Tour Guide".

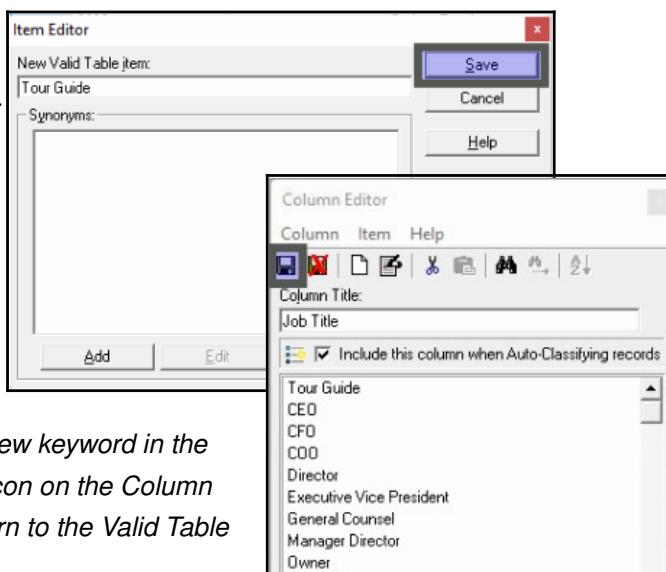


5. (Optional)

If you are adding keywords to an Automatic column, you may also add synonyms to match acronyms, abbreviations, and different phrasings (e.g. "BA" or "B.A." for "Bachelor of Arts"). For more on synonyms, open the Help System from the *Item Editor* window by pushing F1 or clicking **Help**.

6.

Once you have added your keyword, click the **Save** button on the *Item Editor*.



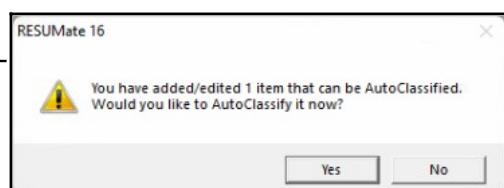
Once the *Item Editor* closes, you will see the new keyword in the column. Click the **Save** icon on the *Column Editor* to close it and return to the *Valid Table Editor* window.

Finally, click the **Save** button on the *Valid Table Editor* to finish adding your keyword.

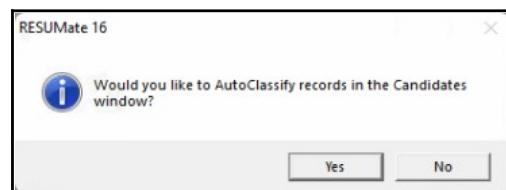
Key Candidate Info	Education	Job Title	Years in Workforce	Relo Issues	Reasons For Leaving
RANKING	High School	Tour Guide	2022	Will need help	Bad Chemistry
	G.E.D.	CEO	2021	Does not need help	Bored
	Associates Degree	CFO	2020		Broken Promises
A-Level Candidate	Bachelors Degree	COO	2019	No Relo	Commission Cut
B-Level Candidate	Advanced Degree	Director	2018	Open to Relo	Downsized
C-Level Candidate	.....	Executive Vice Presider	2017		Fired
Good to Hire	BS Engineering	General Counsel	2016		Growth limited
Questionable	.....	Manager Director	2015	AL	Heavy Travel
Do Not Use	BS Aerospace Eng	Owner	2014	AR	Many Changes

7.

If the keyword(s) you added were in an Automatic column, *RESUMate* will ask to "Auto-Classify" the new keyword.



Click **Yes** and *RESUMate* will look through all of the resumes in your database, match instances of the new keyword(s), and insert them automatically. This keeps all of your records up to date after changes are made to an Automatic column.

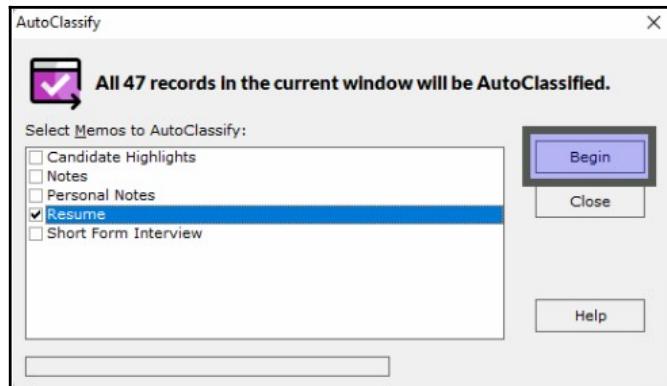


CUSTOMIZING, STEP 2: SETTING UP A LIST OF KEYWORDS AND PHRASES (CONTINUED...)

8.

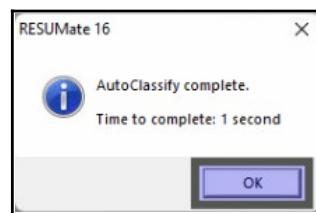
The AutoClassify window will open. By default only the “Resume” memo will be scanned. If you wish to scan other memos (LinkedIn profiles, notes, etc.) select them here before clicking **Begin** (highlighted at right).

Once you click **Begin**, RESUMate will scan the memo text on all records for instances of your new keyword and insert them on any records that match.



9.

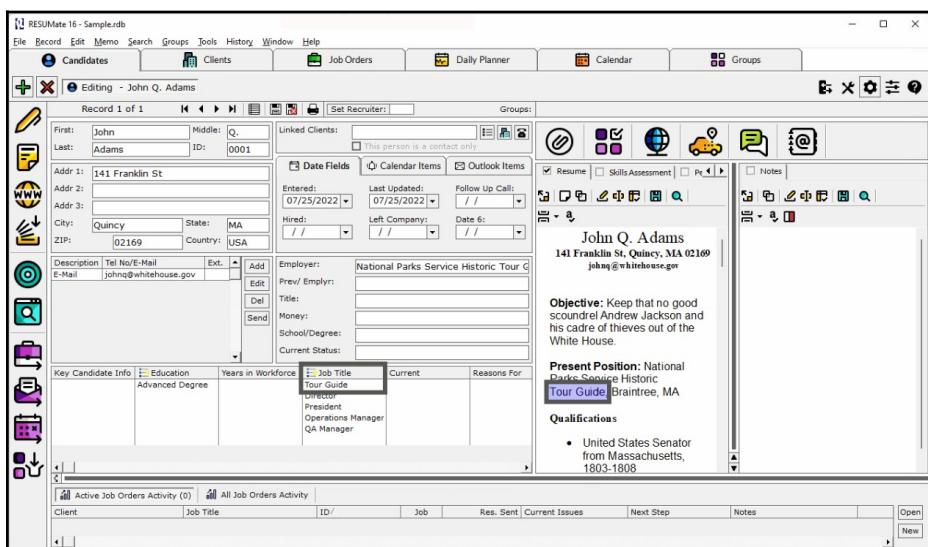
The process typically takes only a few seconds. After AutoClassify completes, click **OK** to close the Valid Table Editor and return to the main record screen.



10.

Since the term “Tour Guide” exists on the resume (highlighted at far right), it now also appears in the Job Title column on the record (box at near right).

All records added to the database from this point forward will be checked for the Tour Guide keyword.



ADDITIONAL DOCUMENTATION: Step 1: Naming Date and Text Fields

Several other database customizations and “housekeeping” functions are stored on the Database Settings window (see page 4 of this document). When the Database Settings window is open on your screen, simply push the F1 key on your keyboard for illustrated articles about all the available options.

ADDITIONAL DOCUMENTATION: Step 2: Setting Up a List of Keywords and Phrases

When the Valid Table Editor is open on your screen, push F1 for a complete breakdown of all the different ways you can customize and use your keyword list.

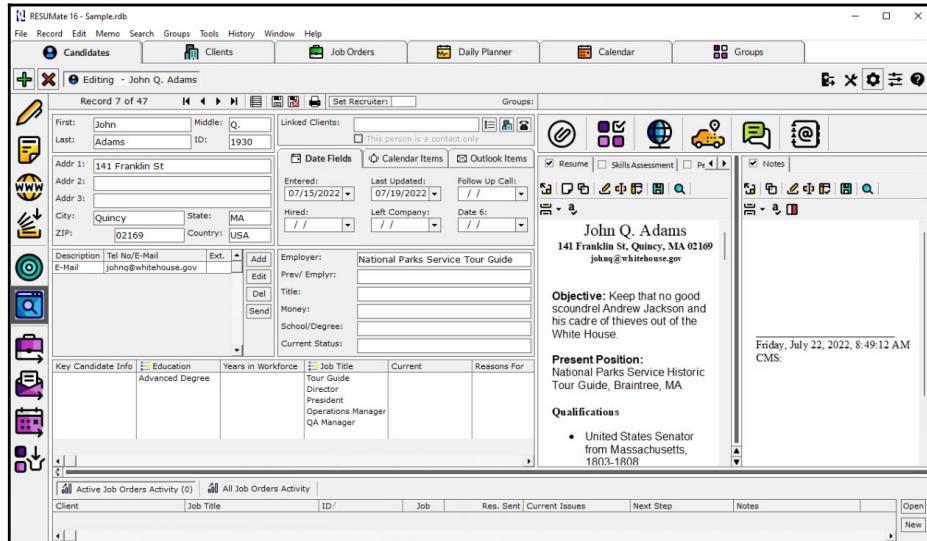
Part III: Searching Your Database

Any item of data in your RESUMate database can be used for searching, either alone or in combination with other data. This makes it easy to find all records in your database that match any profile you can think of. For example, you can find all of the people with a common job title in a given salary range, living in one or more locations. **Any criteria that is stored in the database can be used for searching.**

1.

Click the **Main Search icon** (highlighted at right) to open the search screen.

Note: To better demonstrate the search function, additional records have been added to this database.

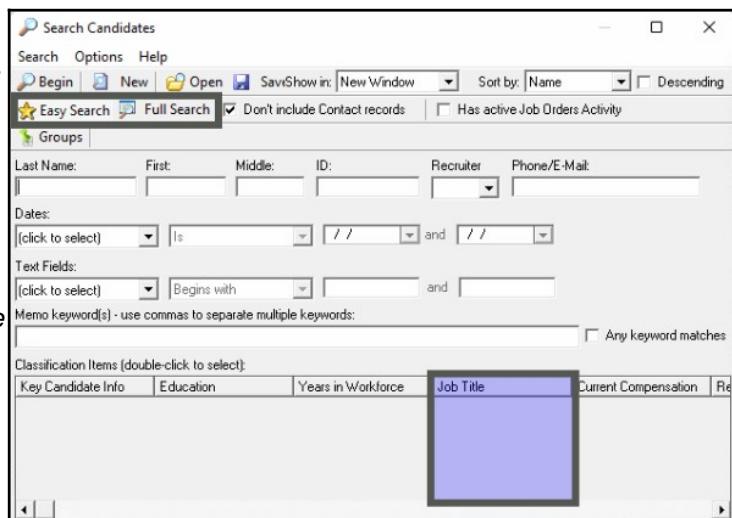


2.

The **Search Candidates** window will open. There are two options, **Easy Search** and **Full Search**.

Easy Search (shown at right) is for searching only a few (or just one) criteria. **Full Search** allows you to search as many criteria in as many AND/OR combinations as you want. For this example, we're going to search for the **Tour Guide** keyword we added to the **Job Title** column.

Double click the **Job Title** column (highlighted at right) to display its list of keywords

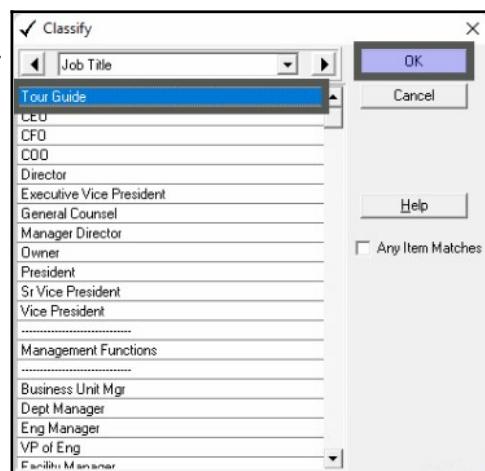


3.

A **Classify** window will open.

Click the **Tour Guide** keyword once and it will highlight.

Then click the **OK** button to return to the search window.

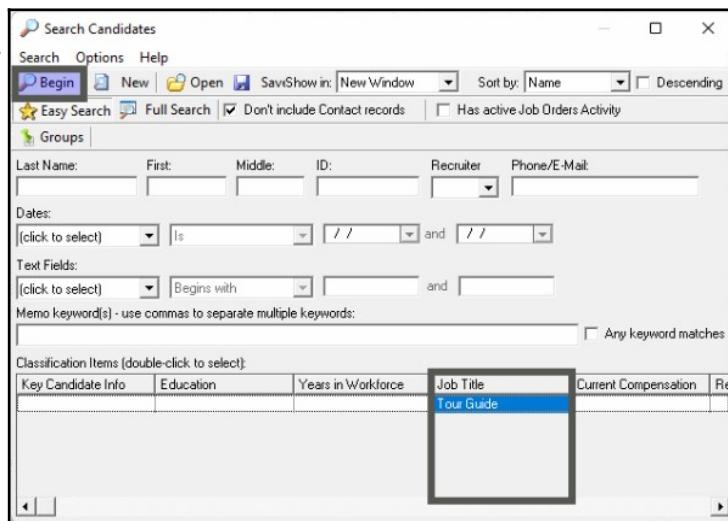


SEARCHING YOUR DATABASE (CONTINUED . . .)

4.

Back on the main search screen, the selected keywords will now appear (box at lower right).

Click the **Begin** button (highlighted) to run the search.

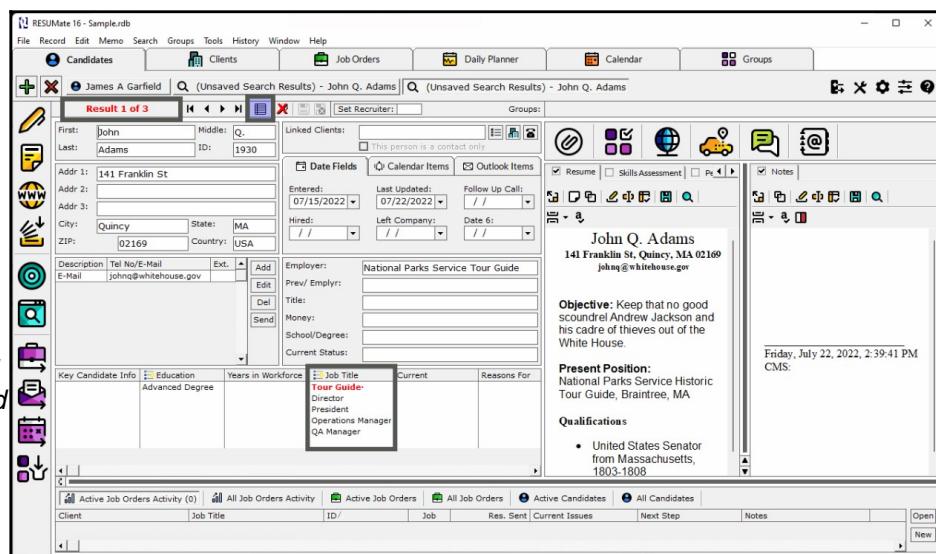


5.

In this example, 3 records were found to contain the *Tour Guide* keyword.

The total number of records will be displayed in the upper left, highlighted in red. The matching keywords will also be highlighted in red (the boxed areas at right).

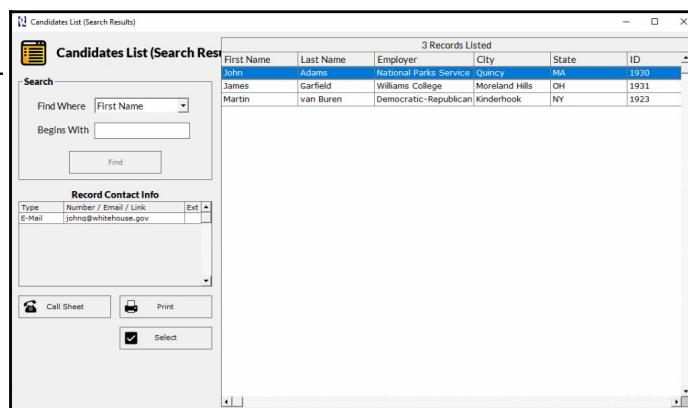
To view a complete list of the results, click the **List** icon (highlighted at right).



6.

This customizable list window will open. It will display all records in the search and allow you to see telephone numbers and email addresses for each record.

You can drag and drop different fields into view, print this list, create a call sheet, or jump to any record by double clicking.



ADDITIONAL DOCUMENTATION: When the Search window is open on your screen, push the F1 key on your keyboard for a complete illustrated guide to Easy Search and Full Search. Please note that Easy Search and Full Search work identically and will return the same results. Full Search simply allows you more search options.

Tracking Send Outs

Once you have identified candidates that match a profile, you can link those candidates to a job opening, set reminders, and track individual candidates as they progress through the hiring process. First, though, you need to enter your first Client and Job Order records.

1.

Click the Client tab (boxed at right) at the top of the RESUMate screen.

Client records store information about a source of jobs. This can be a company, a specific location or department, or any other hiring entity.

On the Client tab, click the new record icon (highlighted) and enter "SeatMate". Then click the **Save** icon (circled).

2.

The bottom section of every Client record contains links to either Job Order or Candidate records. The tabs on the right side (box at right) link to Job Order records. To create a new Job Order record, click the **New** button in the lower right (highlighted).

3.

A new Job Order record will open. Note that the Job Order tab (box at top) is now active.

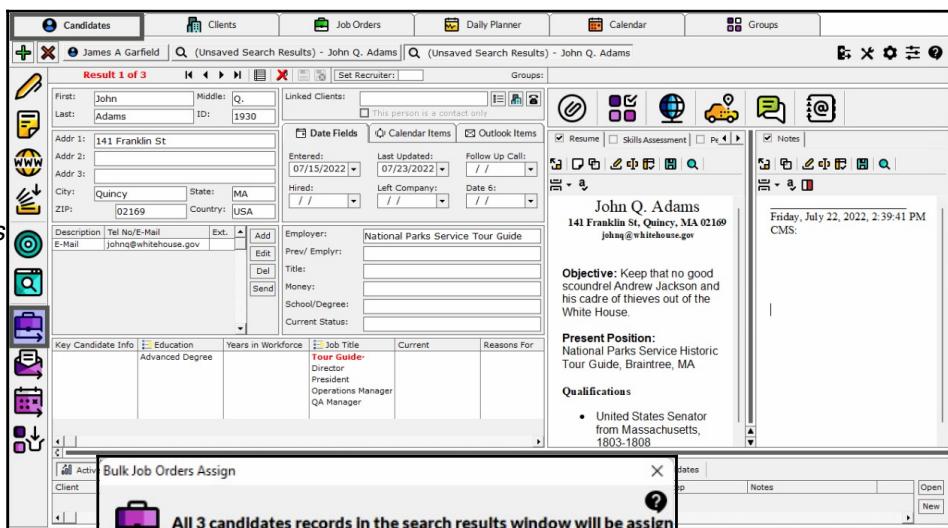
The originating Client record is automatically linked (box at right). Enter "Factory Tour Guide" in the Job Title field and click the **Save** icon.

TRACKING SEND OUTS (CONTINUED ...)

4.

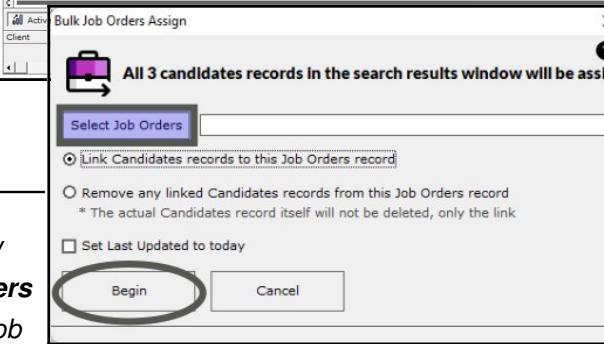
Now that the Client and Job Order records have been created, return to your search result by clicking the Candidates tab at the top of the screen (boxed at right).

Click the **Bulk Job Assign** icon (highlighted at right) to link all 3 records in the search to your new Job Order record.



5.

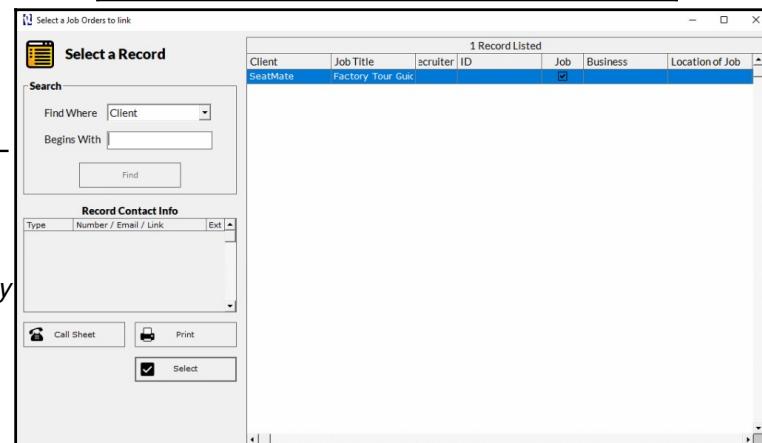
The Bulk Job Orders Assign window will open. Click the **Select Job Orders** button (highlighted) to choose the Job Order record to which these Candidates will be linked.



6.

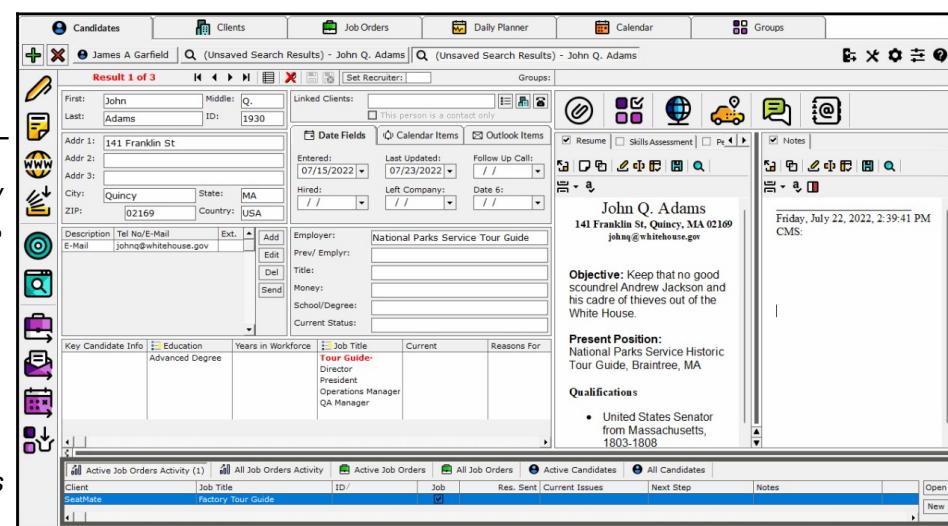
A List window will open, displaying all active Job Order records. Double click the Factory Tour Guide record to select it.

You will be taken back to the Bulk Job Order Assign window. Click the **Begin** button (circled above).



7.

All 3 Candidate records are now linked to the Factory Tour Guide Job Order record. The link is displayed at the bottom of the screen (box at right). Double click the link to open the Job Order Activity record and track this candidate's progress on this job.



TRACKING SEND OUTS (CONTINUED . . .)

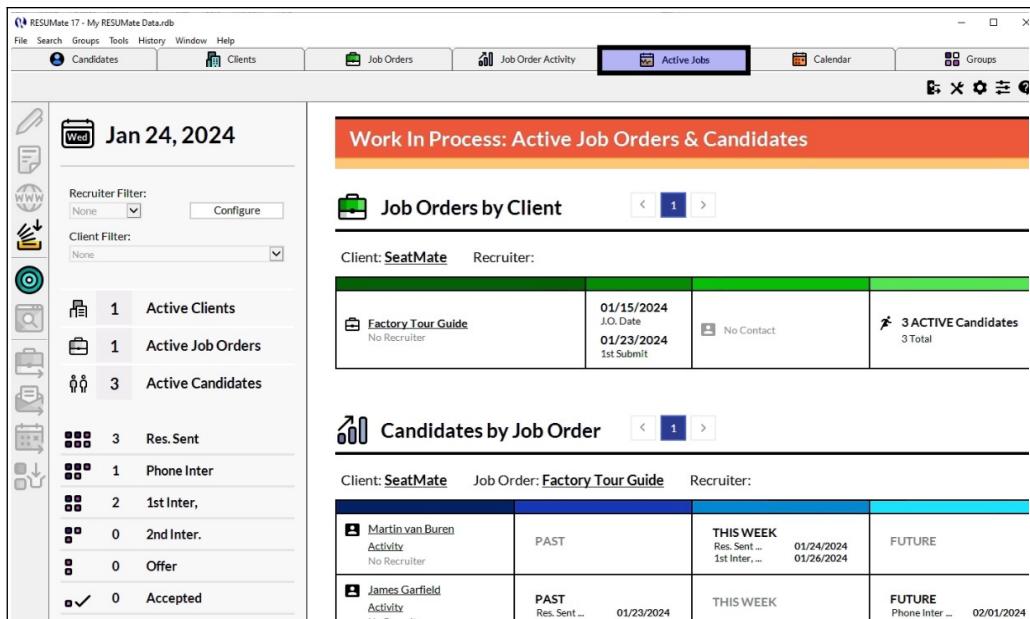
8.

Once you have a job record and some linked candidates, click the Active Jobs tab (boxed at right) at the top of the screen.

Active Jobs is a “live report” of all of your currently in process job openings. It contains two sections:

Job Orders by Client lists all currently open job records, divided up by client.

Candidates by Job Order lists all currently active candidates, divided up by client and job.



Job Order	Date	Status	Recruiter
Factory Tour Guide	01/15/2024	No Contact	SeatMate

Candidate	Status	Recruiter
Martin van Buren	PAST	SeatMate
James Garfield	PAST	SeatMate

Dates from active records are displayed automatically. You can jump to any linked record by clicking the name.

There are three controls on the Active Jobs tab:

1) Recruiter Filter – Use this pulldown menu to select a recruiter’s initials and only Job Order records belonging to that recruiter will be displayed.

2) Client Filter – Use this pulldown menu to select a Client record and only Job Order records linked to that Client record will be displayed. Please note that only Client records with active linked Job Order records are listed.

3) “Configure Dates” allows you to select the date fields from the Job Order and Job Order Activity records that will be displayed by the Active Jobs tab.

Data saved in one record flows automatically to other screens. For example, when candidates are linked to jobs (as in the example above), that information populates to the candidate’s record, the client’s record, the job record, and the Active Jobs screen.

ADDITIONAL DOCUMENTATION: Push F1 from the Client, Job Order, Job Order Activity, or Active Jobs screens for a complete illustrated guide to those screens.

Every screen, icon, and menu in RESUMate is documented in the Help System, click the Help icon or push F1 from any screen for additional documentation. If you have further questions, please let us know at techsupport@resumate.com or call us at 1-800-530-9310. We've helped tens of thousands of people learn to use RESUMate over the years. If you've got a question, we've got an answer. Thanks!