

# RESUMate 16

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## 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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# Part I: Converting Resumes Into Database Records

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

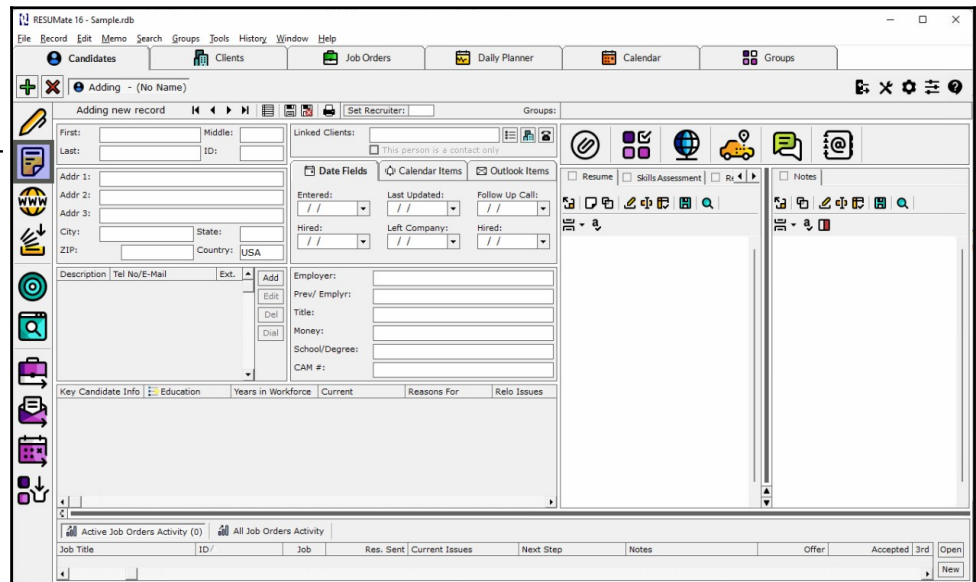
This includes:

- (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.

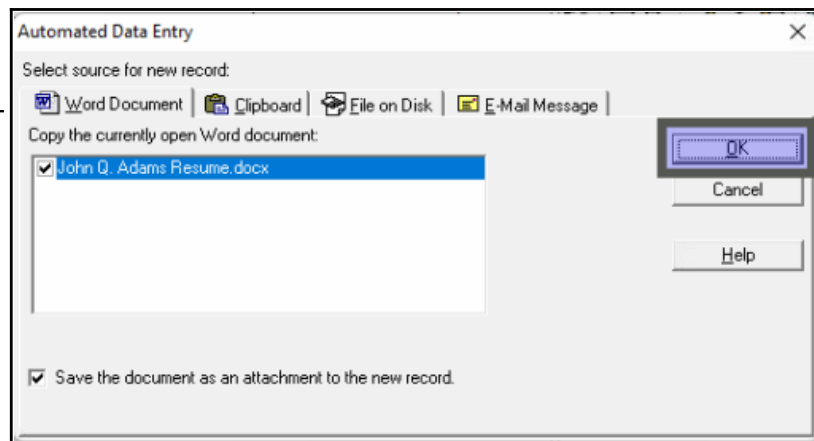
Clicking the highlighted **Automated Data Entry (ADE)** icon will automatically create a new record from a resume.



2.

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

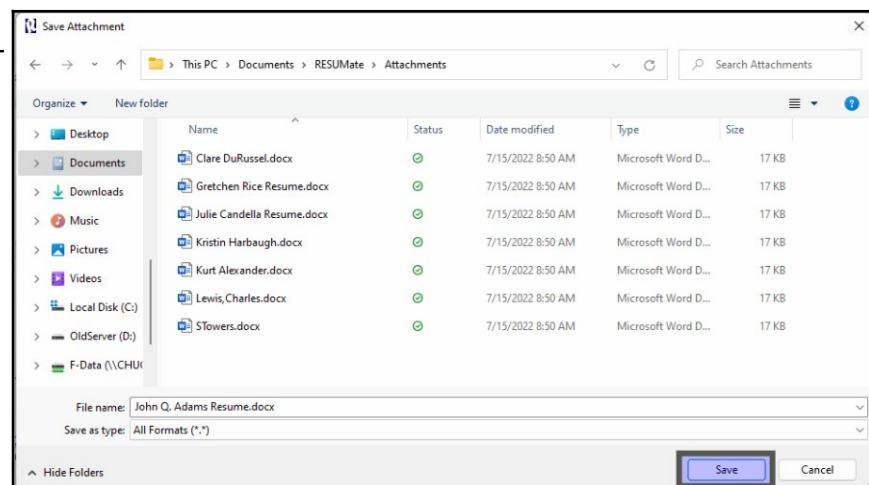
In this example we're using a .docx file that is currently open in Word. Once you've selected a resume, click the **OK** button.



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.

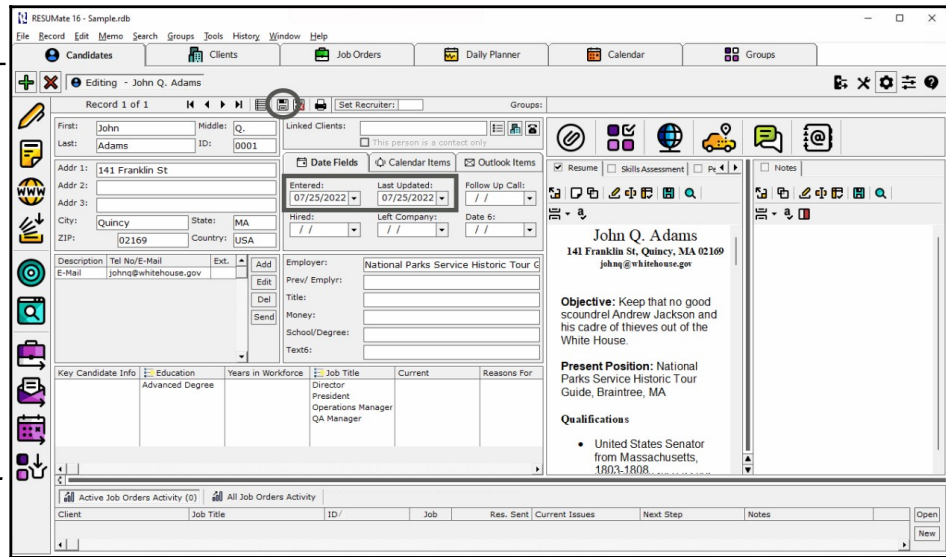
Clicking the circled Employer field will automatically paste that information.

## 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 other users on your network (if any).

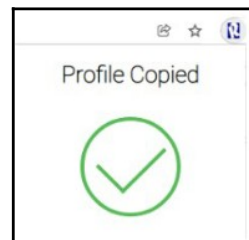
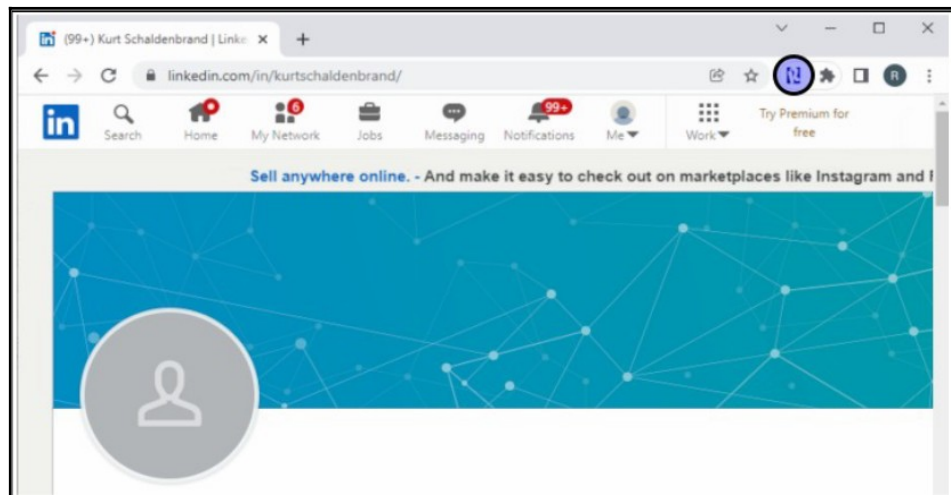
By default, two dates will be automatically recorded (in the box at right). **Entered** will store the date this record was created. **Last Update** will store that last date any changes were made to this record.



## Converting LinkedIn Profiles to Database Records

1.

First, open someone's profile on LinkedIn. 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

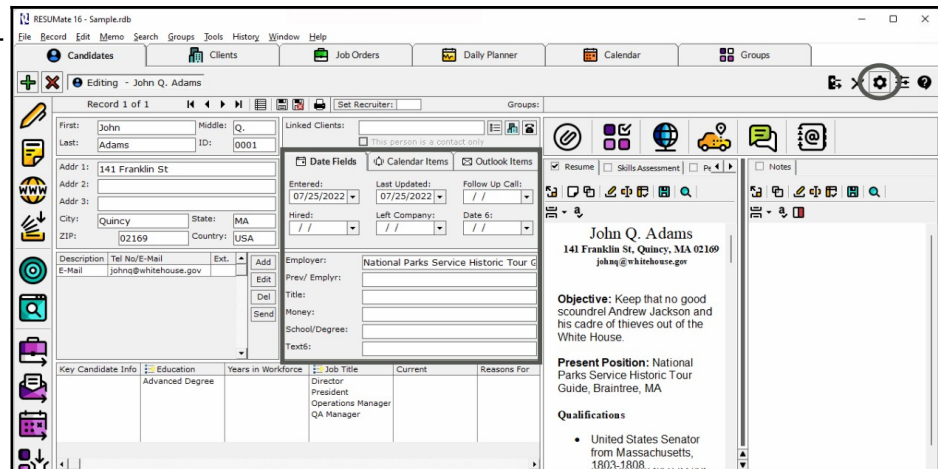
With a few clicks, RESUMate will look as though it was custom-developed just for you. There are two basic steps to customizing your database: (1) re-naming the date and text fields to reflect your preferences, and (2) setting up a list of keywords and phrases that will be automatically extracted from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

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

1.

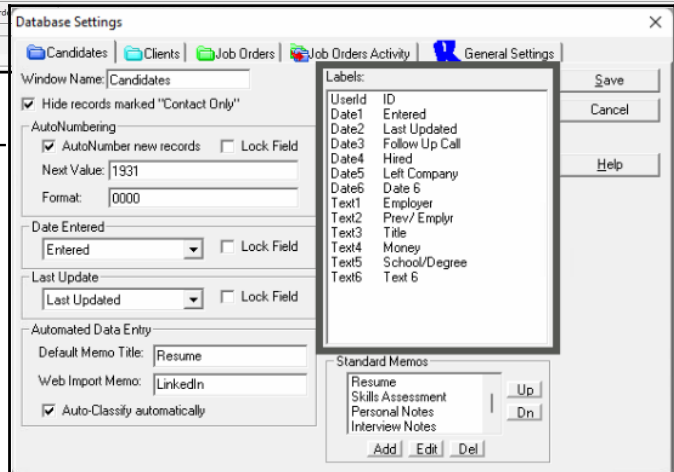
Date and text fields are shown in the boxed area at right. In this example we're going to rename the field currently labeled 'Text6'.

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



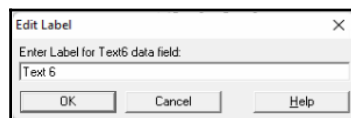
2.

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).



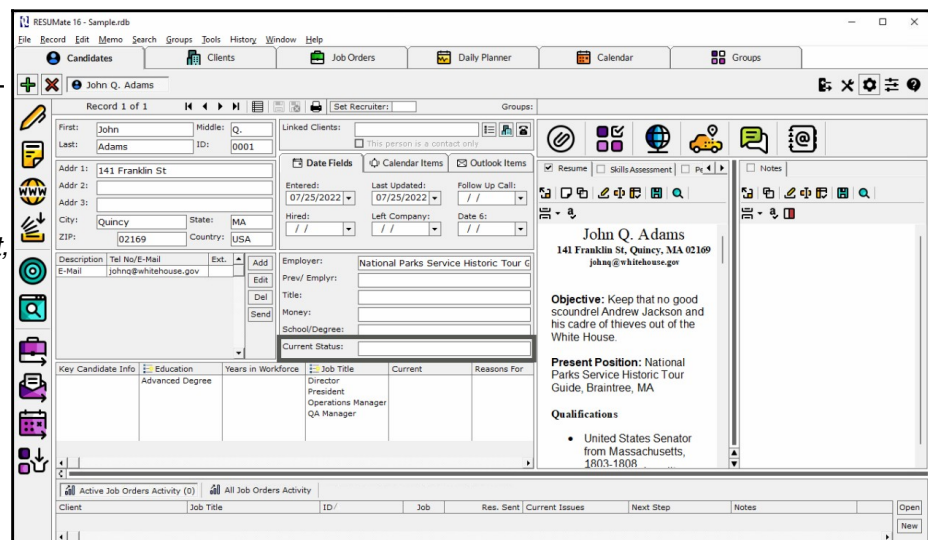
3.

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**

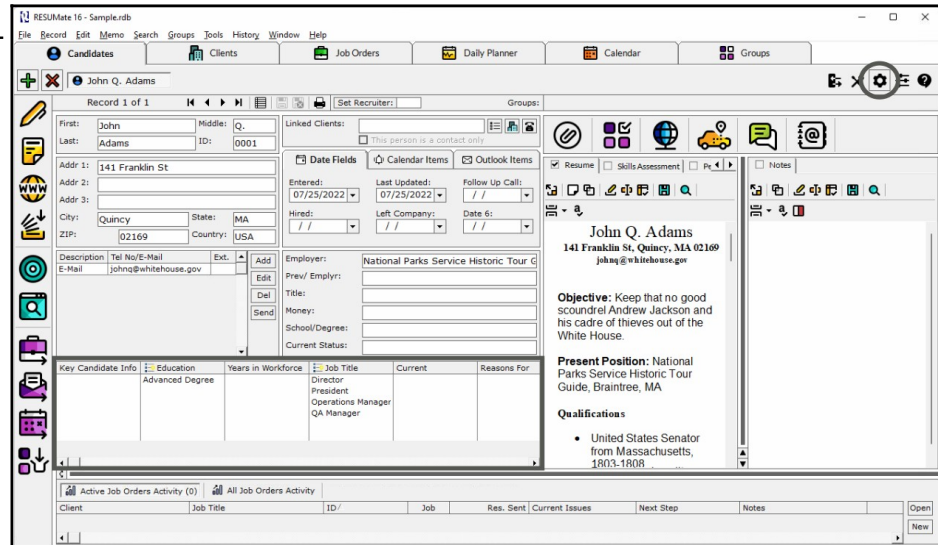
RESUMate keeps a list of keywords and phrases called the Valid Table. The table is divided into columns for easy organization. Keywords in **Automatic** columns will be automatically matched and highlighted on all new records. Keywords in **Manual** columns act as checklists, allowing you to manually 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.

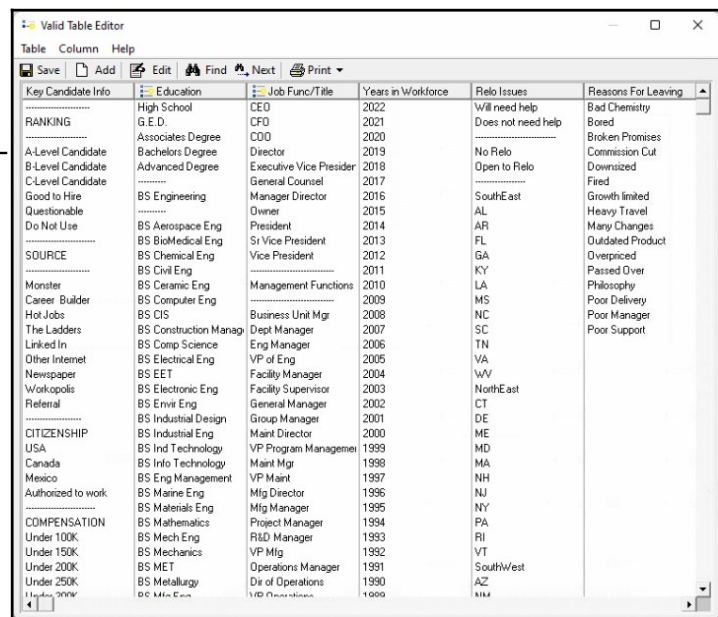
To customize the Valid Table, click the **Customize**  icon in the upper right again, but this time select Customize the Keyword Table.



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.



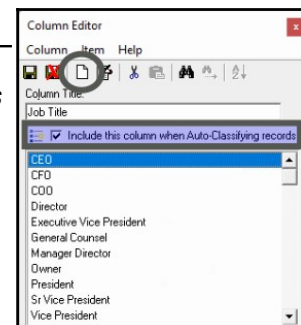
Key Candidate Info	Education	Job Func/Title	Years in Workforce	Relo Issues	Reasons For Leaving
RANKING	High School	CEO	2022	Will need help	Bad Chemistry
	G.E.D.	CFO	2021	Does not need help	Bored
	Associates Degree	COO	2020		Broken Promises
A-Level Candidate	Bachelors Degree	Director	2019	No Relo	Commission Cut
B-Level Candidate	Advanced Degree	Executive Vice President	2018	Open to Relo	Downsized
C-Level Candidate		General Counsel	2017		Fired
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	Many Changes
	BS BioMedical Eng	Sr Vice President	2013	FL	Outdated Product
	BS Chemical Eng	Vice President	2012	GA	Overpriced
	BS Civil Eng		2011	KY	Passed Over
Monster	BS Ceramic Eng	Management Functions	2010	LA	Philosophy
Career Builder	BS Computer Eng		2009	MS	Poor Delivery
Hot Jobs	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	Mig Director	1996	NJ	
	BS Materials Eng	Mig 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 Mig	1992	VT	
Under 200K	BS MET	Operations Manager	1991	SouthWest	
Under 250K	BS Metallurgy	Dir of Operations	1990	AZ	
Under 300K				WY	

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).



Column	Item	Help
Job Title		
<input checked="" type="checkbox"/>	CEO	
<input checked="" type="checkbox"/>	CFO	
<input checked="" type="checkbox"/>	COO	
<input checked="" type="checkbox"/>	Director	
<input checked="" type="checkbox"/>	Executive Vice President	
<input checked="" type="checkbox"/>	General Counsel	
<input checked="" type="checkbox"/>	Manager Director	
<input checked="" type="checkbox"/>	Owner	
<input checked="" type="checkbox"/>	President	
<input checked="" type="checkbox"/>	Sr Vice President	
<input checked="" type="checkbox"/>	Vice President	

#### 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".

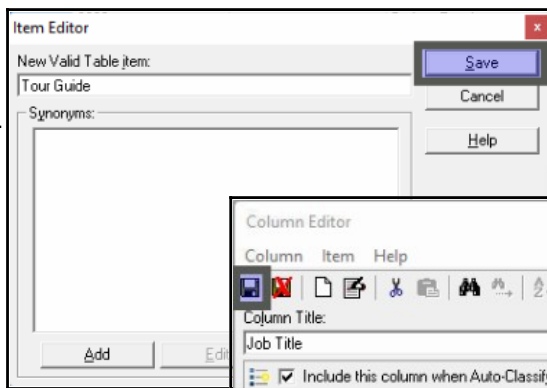


#### 5. (Optional)

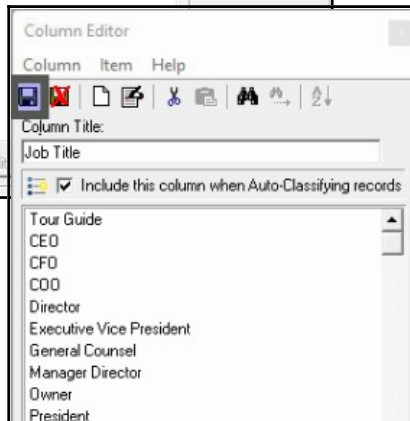
If you are adding keywords to an *Automatic* column, you may also add synonyms to match acronyms, abbreviations, and different phrasings (e.g. "BA" or "B.A." for "Bachelor of Arts"). For more on synonyms, open the *Help System* from the *Item Editor* window by pushing **F1** or clicking **Help**.

#### 6.

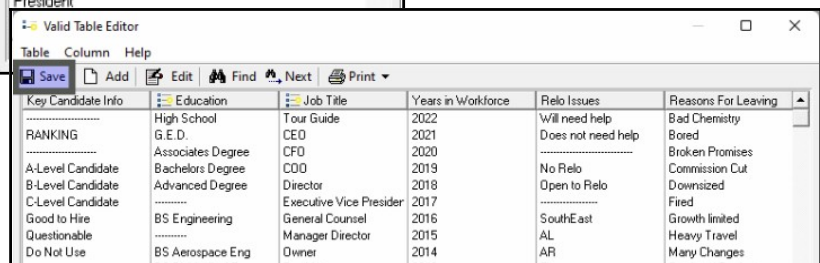
Once you have added your keyword, click the **Save** button on the *Item Editor*.



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.

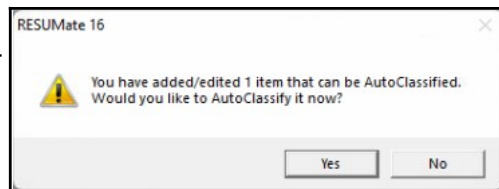


Finally, click the **Save** button on the *Valid Table Editor* to finish adding your keyword.

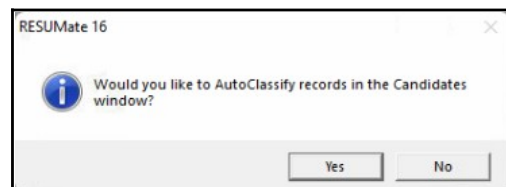


#### 7.

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.

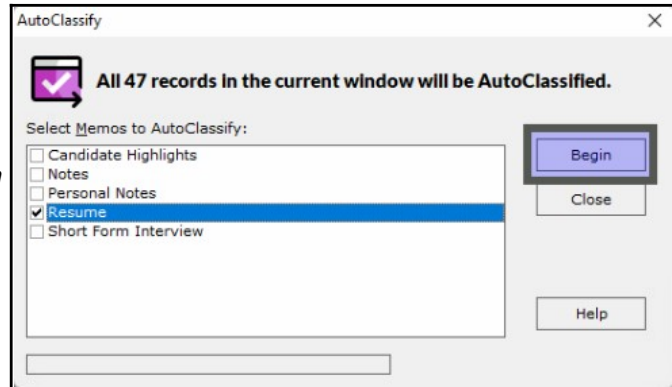


## CUSTOMIZING, STEP 2: SETTING UP A LIST OF KEYWORDS AND PHRASES (CONTINUED...)

### 8.

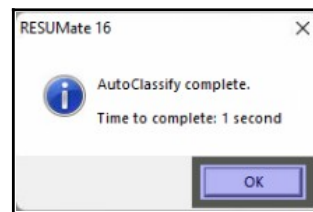
The AutoClassify window will open. By default only the “Resume” memo will be scanned. If you wish to scan other memos (LinkedIn profiles, notes, etc.) select them here before clicking **Begin** (highlighted at right).

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.

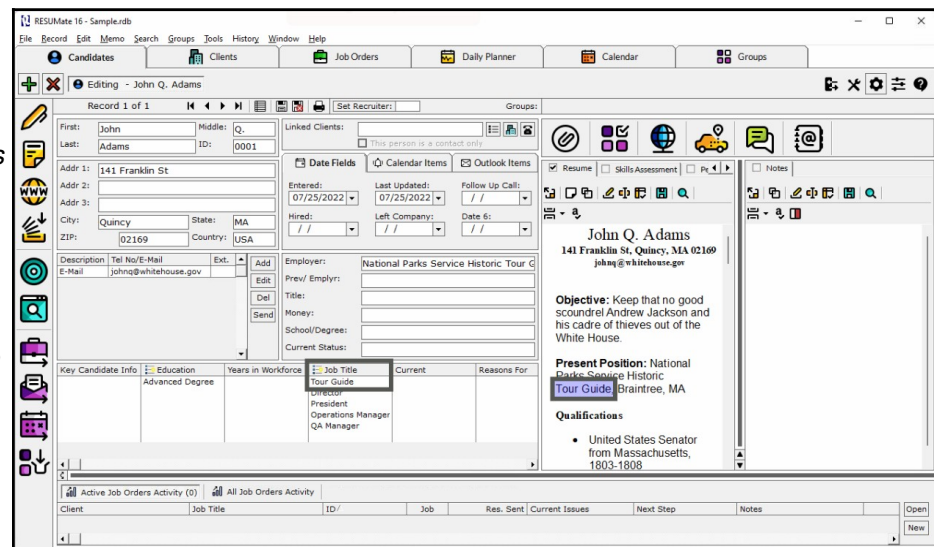
The process typically takes only a few seconds. After AutoClassify completes, click **OK** to close the Valid Table Editor and return to the main record screen.



### 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.



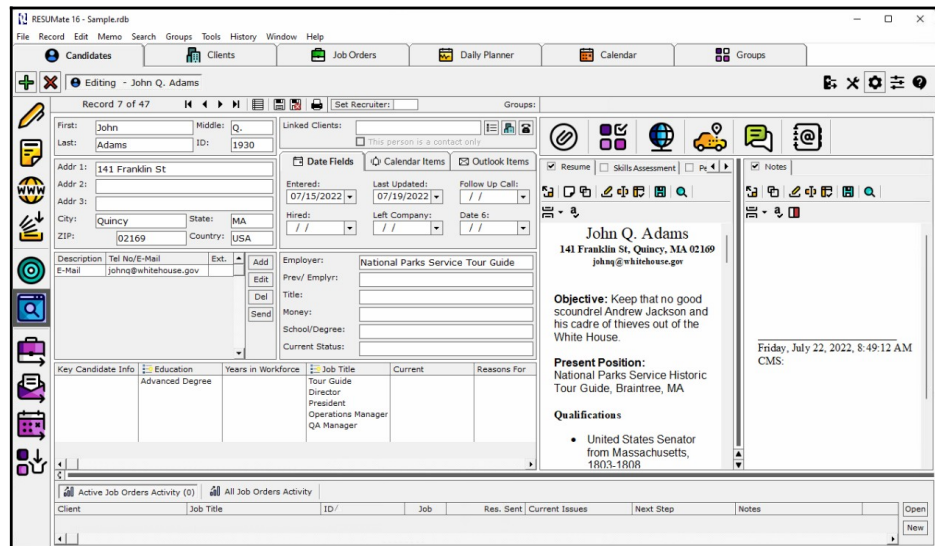
## Part III: Searching Your Database

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.

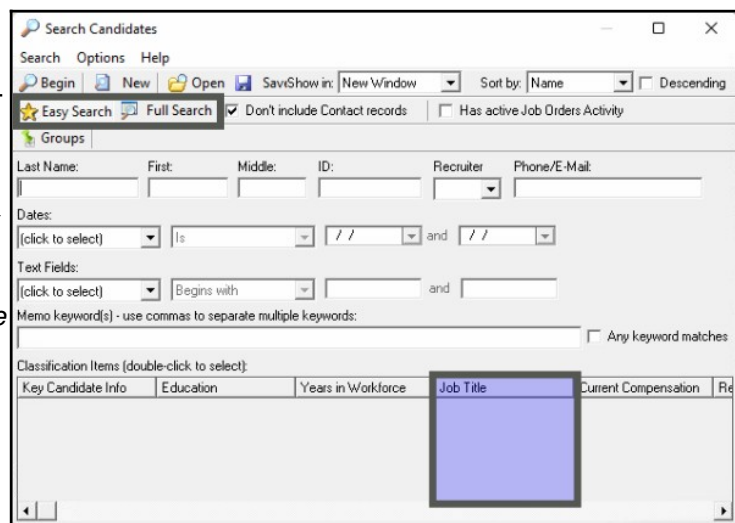


2.

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

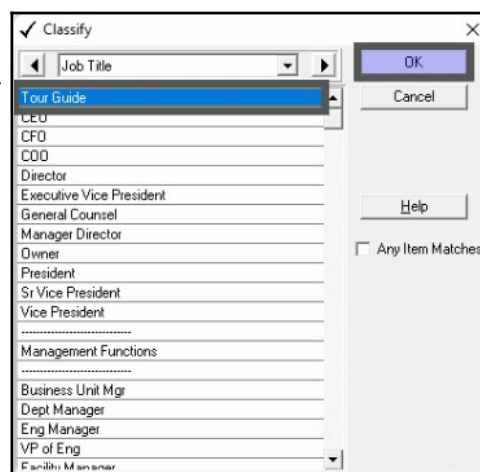


3.

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.

Search Candidates

Search Options Help

Begin New Open Save Show in: New Window Sort by: Name Descending

Easy Search Full Search Don't include Contact records Has active Job Orders Activity

Groups

Last Name: First: Middle: ID: Recruiter: Phone/E-Mail:

Dates: (click to select) is / / and / /

Text Fields: (click to select) Begins with and

Memo keyword(s) - use commas to separate multiple keywords: Any keyword matches

Classification Items (double-click to select):

Key Candidate Info	Education	Years in Workforce	Job Title	Current Compensation	Re
			Tour Guide		

### 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).

RESUME 16 - Sample.rdb

File Record Edit Memo Search Groups Tools History Window Help

Candidates Clients Job Orders Daily Planner Calendar Groups

Result 1 of 3

First: John Middle: Q Last: Adams ID: 1930

Addr 1: 141 Franklin St Addr 2: Addr 3: City: Quincy State: MA ZIP: 02169 Country: USA

Description Tel No/E-Mail Ext. Add Edit Del Send

johnq@whitehouse.gov

Unlinked Clients: This person is a contact only

Date Fields: Entered: 07/15/2022 Last Updated: 07/22/2022 Follow Up Call: / / Hired: / / Left Company: / / Date 6: / /

Employer: National Parks Service Tour Guide

Prev/ Emplr: Title: Money: School/Degree: Current Status:

Key Candidate Info: Education: Advanced Degree Years in Workforce: Job Title: Tour Guide Current: Reasons For:

John Q. Adams  
141 Franklin St, Quincy, MA 02169  
johnq@whitehouse.gov

Objective: Keep that no good scoundrel Andrew Jackson and his cadre of thieves out of the White House.

Present Position: National Parks Service Historic Tour Guide, Braintree, MA

Qualifications

- United States Senator from Massachusetts, 1803-1808

Friday, July 22, 2022, 2:39:41 PM CMS:

Active Job Orders Activity (0) All Job Orders Activity Active Job Orders All Job Orders Active Candidates All Candidates

Client Job Title ID Job Res. Sent Current Issues Next Step Notes Open New

### 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.

Candidates List (Search Results)

3 Records Listed

First Name	Last Name	Employer	City	State	ID
John	Adams	National Parks Service	Quincy	MA	1930
James	Carlfield	Williams College	Moreland Hills	OH	1931
Martin	van Buren	Democratic-Republican	Kinderhook	NY	1923

Search: Find Where: First Name Begins With Find

Record Contact Info: Type: Number / Email / Link Ext. E-Mail: johnq@whitehouse.gov

Call Sheet Print Select

**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.

## Part IV: 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.

The screenshot shows the 'Candidates' tab selected at the top. Below the search bar, there are three search results. The first result is highlighted. On the right side of the interface, there is a detailed view of the candidate 'John Q. Adams'. The 'Bulk Job Assign' icon, which is a purple square with a white arrow, is highlighted in the top right corner of the interface.

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.

The 'Bulk Job Orders Assign' window is open. It contains a 'Select Job Orders' button, which is highlighted with a red box. Below this button, there are several options: 'Link Candidates records to this Job Orders record', 'Remove any linked Candidates records from this Job Orders record', and 'Set Last Updated to today'. The 'Begin' button is circled in red.

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).

The 'Select a Job Orders to link' window is open. It shows a list of Job Order records. The 'Factory Tour Guide' record is highlighted. The 'Select' button is circled in red.

7.

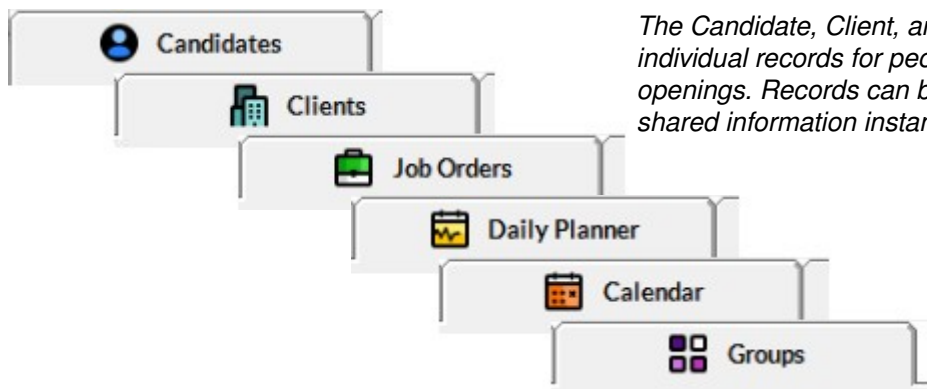
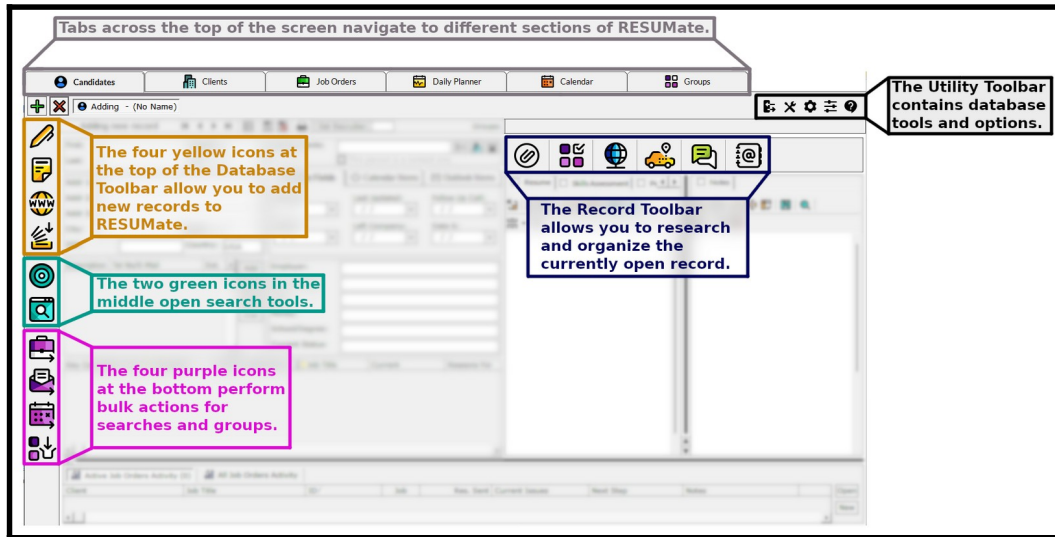
All 3 Candidate records are now linked to the Factory Tour Guide Job Order record. The link is displayed at the bottom of the screen (box at right). Double click the link to open the Job Order Activity record and track this candidate's progress on this job.

The screenshot shows the 'Job Orders' tab selected at the top. Below the search bar, there are three search results. The first result is highlighted. On the right side of the interface, there is a detailed view of the Job Order record for 'Factory Tour Guide'. The 'Link' button, which is a purple square with a white arrow, is highlighted in the top right corner of the interface.



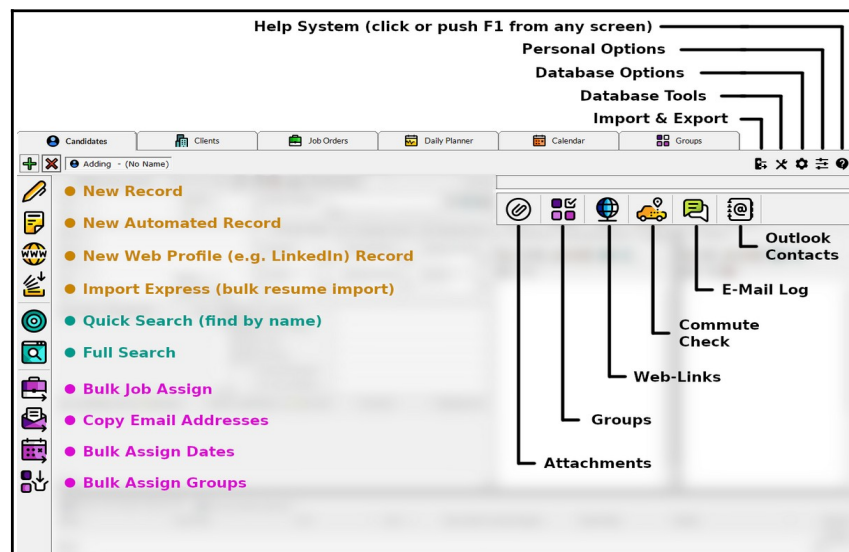
# RESUMate 16 Screenmap

RESUMate is designed to make everyday tasks as easy as possible while keeping important information right on your screen.



The Candidate, Client, and Job Order tabs contain individual records for people, companies, and job openings. Records can be linked together to display shared information instantly.

The Daily Planner, Calendar and Groups tabs automatically organize and display information from people, company, and job records.



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](mailto: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!