tempworks software

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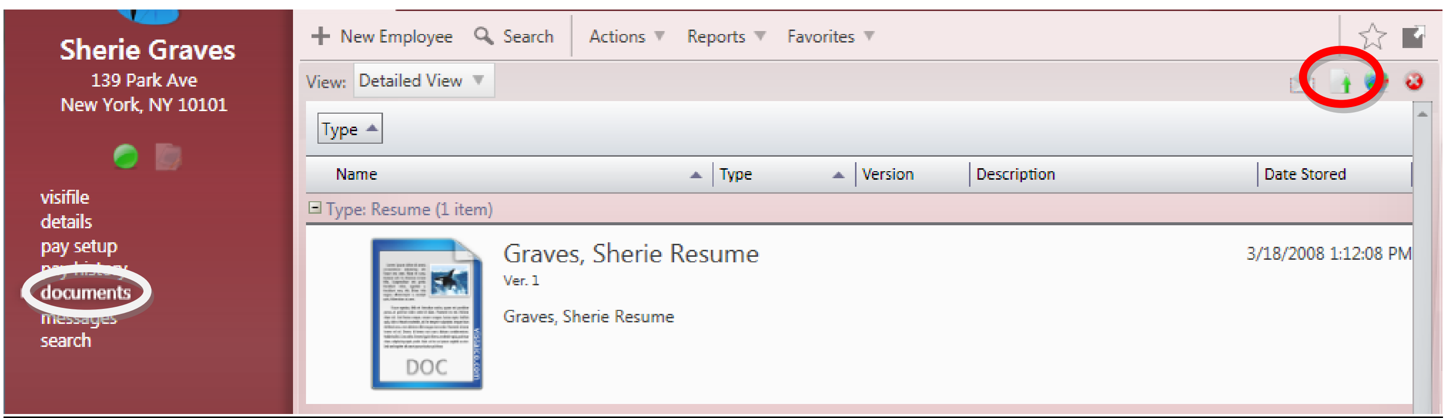
12R8 Submitting Resumes

Enterprise has ***Email*** functionality that makes submitting resumes to a client supervisor or hiring manager extremely easy. First the document must be attached to the **Employee's** record as a document *Type* of "Resume". If the **Resume Parser** was used to create the **Employee** record the original resume document that was used for the parsing will automatically be attached in the **Employee Documents** form as a "Resume".

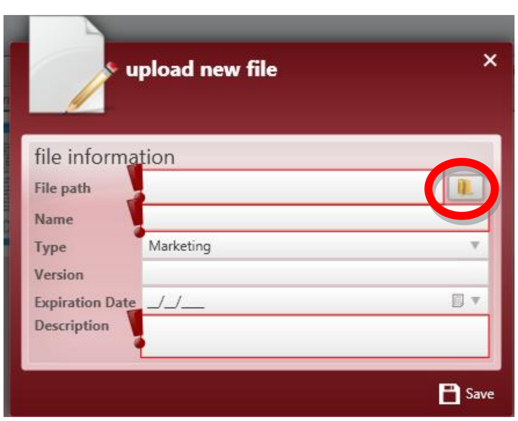
*Note – For directions on using the **Resume Parser** to create a new **Employee** record refer to the 12R8 Enterprise Front Office Training Manual.

To manually upload a document to the **Employee** record, follow the steps below:

1) **Look up the Employee record** – Use the **Search** form functions to locate the **Employee** record and double-click to open.
2) **Navigate to the Documents form** – Once the **Employee** record is open click on the **Documents** line from the navigation menu on the left side of the screen.



3) **Upload the Resume** - Click on the button in the upper right of the screen (as circled above). This will open the ***Upload New File*** form as shown below:



Click on the button to open your file list (as circled). Once you have located the document you would like to attach to the record double-click on it. The document name will be displayed in the *File Path* field. The doc name will be displayed in the *Name* field. Select the *Type* from the drop down menu and add a *Description*.

*Note - Make sure that all **Employee** resumes are listed with a *Type* of "Resume". This is how Enterprise determines if a document can be submitted from the **Candidates** form on the **Order**.

*Note - If the document is the original resume enter "Original" or something similar in the *Description* field. If attaching a modified resume where the **Employee's** contact info has been removed enter "[Your Company Name Here] resume" or something similar in the *Description* field. This will make it much easier to determine which document to select from the **Order** if there are multiple "Resume" *Type* documents attached for the same **Employee**.

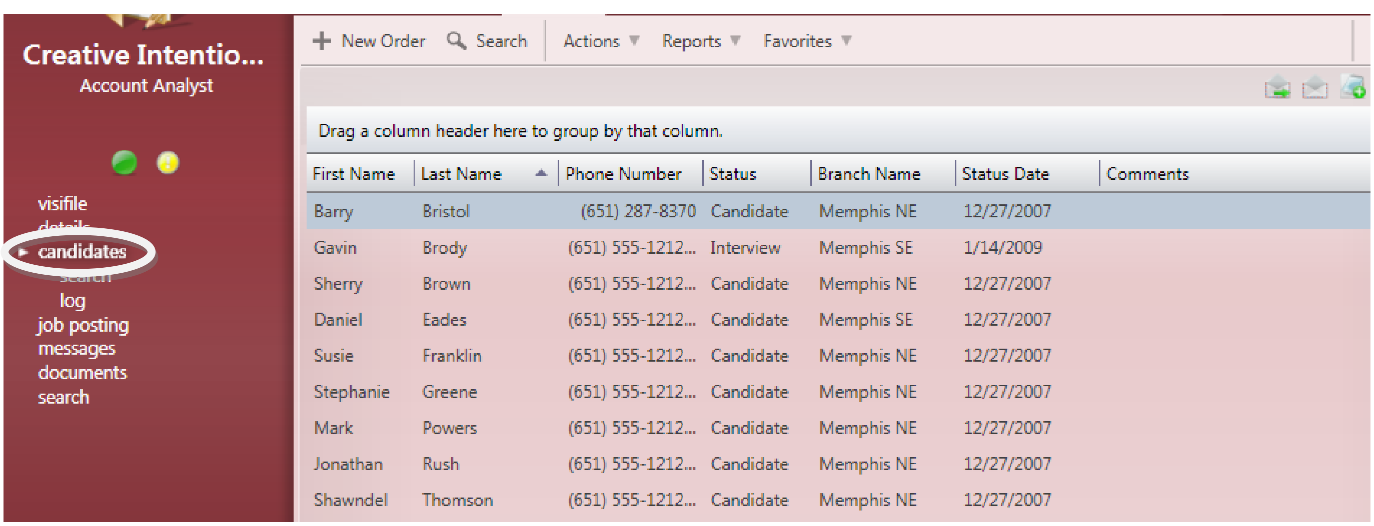
4) **Save the Resume** - Once all of the information has been entered click on the *Save* button in the lower right of the ***Upload New File*** form. The document is now saved on the **Employee** record. To view the document, double-click on it.

*Note – In most instances when submitting resumes to a supervisor or hiring manager you will not want the **Employee's** contact information to appear. If you used the **Resume Parser** or uploaded the original resume, you will want to create a second copy where the contact info is removed. To personalize this resume further, add your contact information and the company logo. Then follow the steps above to attach the document to the **Employee's** record.

Submitting resumes is done from the **Order** record. Look up the **Order** that resumes need to be submitted for and then select the **Candidates** line from the menu on the left. The **Candidates** form displays the names of **Employees** who are being considered for the **Order**.

1) Attach Candidates

Employees can be attached to the **Candidates** form by doing an **Employee Search**, selecting the lines and right-clicking. Then select *Set as Order Candidate* from the drop down menu that appears. A second way to attach is from the **Order**/**Candidates**/***Search*** form. Run the ***Search***, select the **Employees** from the results, then right-click and select *Make Employee a Candidate* from the drop down menu. When an **Employee** and **Order** record are open select *Set as Candidate for [Customer/Department name]* from the **Employee** *Actions* drop down menu or *Make [Employee name] a Candidate on this Order* from the **Order** *Actions* drop down menu.



*Note – Before taking the next step, make sure that a **Contact** with a ***Role*** of "Supervisor" is attached on the **Order Details** form. Otherwise the **Contact**(s) will need to be added manually to the *To* field on the ***Email***.

2) Change Status

On the **Order Candidates** form change the *Status* of the **Employee** for the **Order** to "Submitted" or something similar to indicate that their resume has been sent to the supervisor or hiring manager.

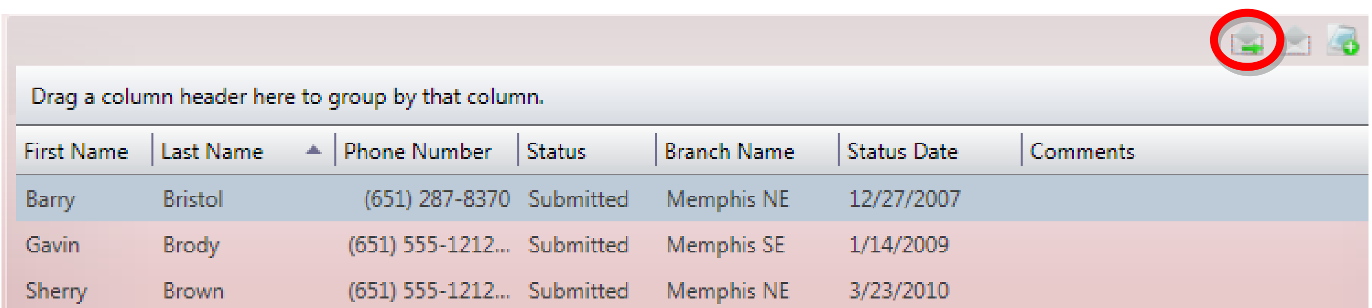
Double-click on the **Employee's** line in the **Order Candidates** form to bring up the box to the left. You can change their *Status* and add *Comments* about the **Employee** that is displayed in the **Candidates** form. Then click on the *Save* button to add it to the database.

The **Employee's** *Status* can also be changed by right-clicking on their line, selecting *Change Status* from the drop down menu and then choosing the "Submitted" *Status* from the menu that will appear to the right.

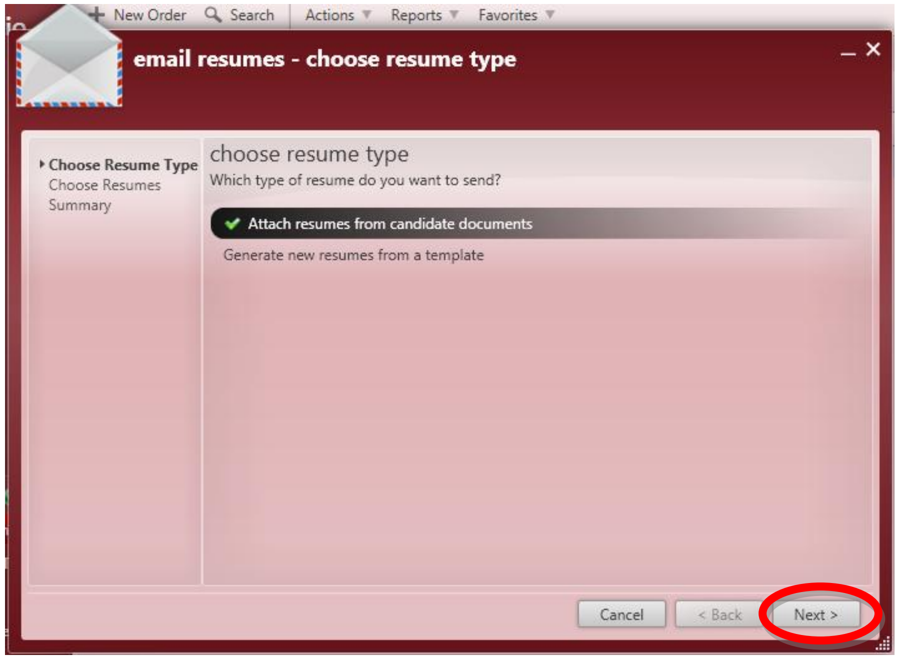
*Note – Adding candidates to the **Order** logs a ***Message*** record on the **Order**, **Customer**, **Employee** and supervisor **Contact** records automatically. Any changes to the *Status* of a candidate in this form will also log a ***Message*** to all of these records.

3) Open Email Resume Wizard

After the *Status* has been updated click on the button in the upper right as circled below:



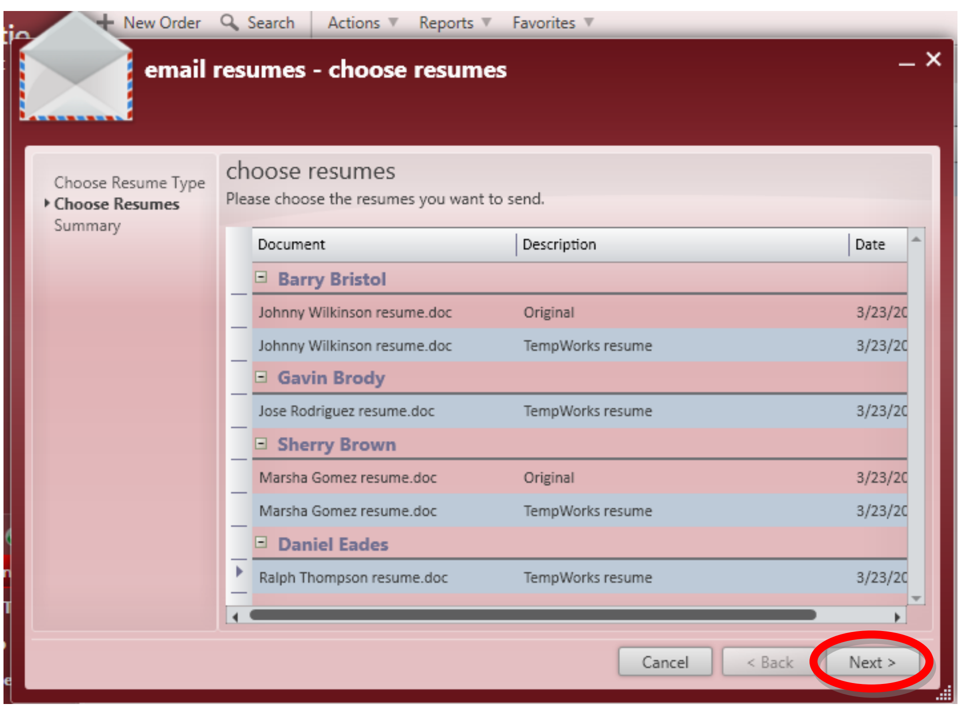
When the button is clicked the email resume wizard will open as shown to the right.



4) Choose Resume Type

Two resume options are available: select *Attach Resumes from Candidate Documents* if the **Employees** already have resume documents attached to their records or *Generate New Resumes from a Template* to create generic resumes from information contained on the ***Past Jobs***, ***Education***, and ***Work Interests*** forms of the **Employees'** records. Once the selection is made, click *Next*. If choosing *Generate New Resumes from a Template*, skip to step 5b on page 7 of this document.

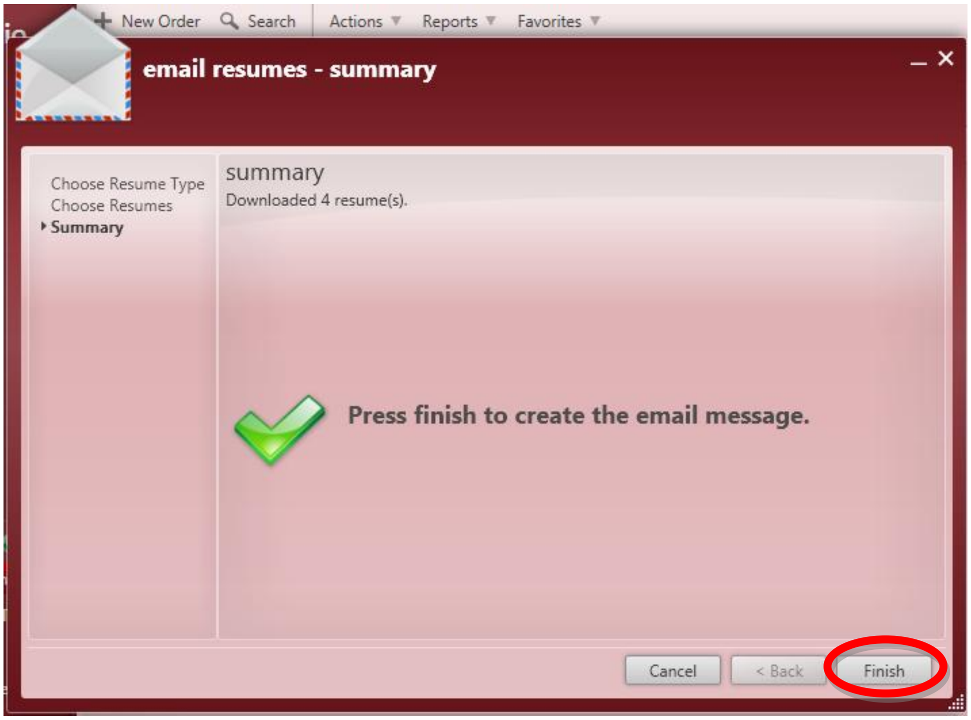
5a) Select Resumes – If *Attach Resumes from Candidate Documents* is selected, the form below will be displayed after clicking *Next*.



Select the resumes by holding down the *Ctrl* button on your keyboard and clicking on the line for the resume. Once all of the documents have been selected, click *Next*.

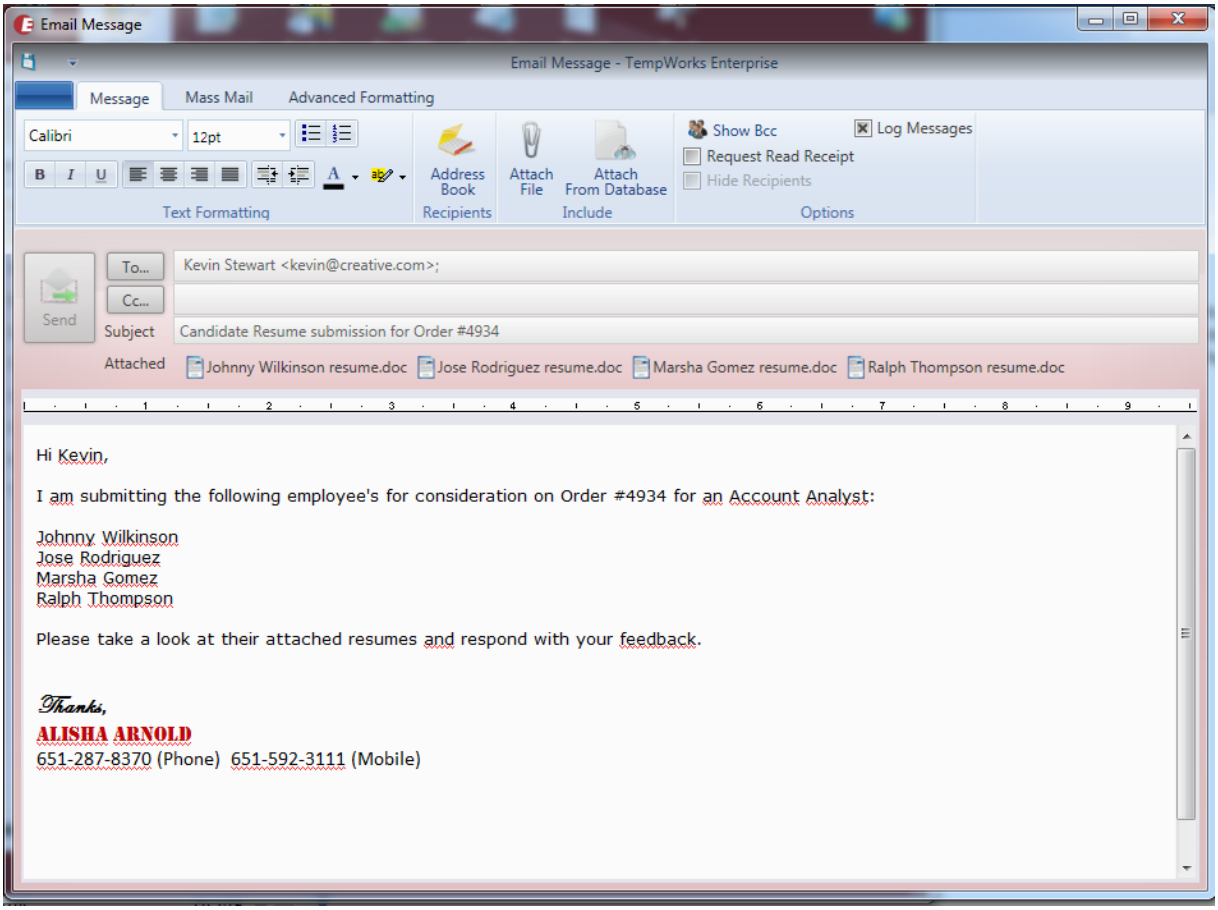
*Note – The *Description* that was entered when the document was uploaded should help you determine which resume to pick if multiple resumes have been attached to the same **Employee**. In the example above only the documents listed as "TempWorks resume" are selected. In this case, "TempWorks resume" indicates that this is the modified resume where the **Employee's** contact info has been removed.

6a) Finish – The resumes will be downloaded and then the screen below will be displayed. Click *Finish* to open the outgoing ***Email*** with the **Employees'** "Resume" documents attached.



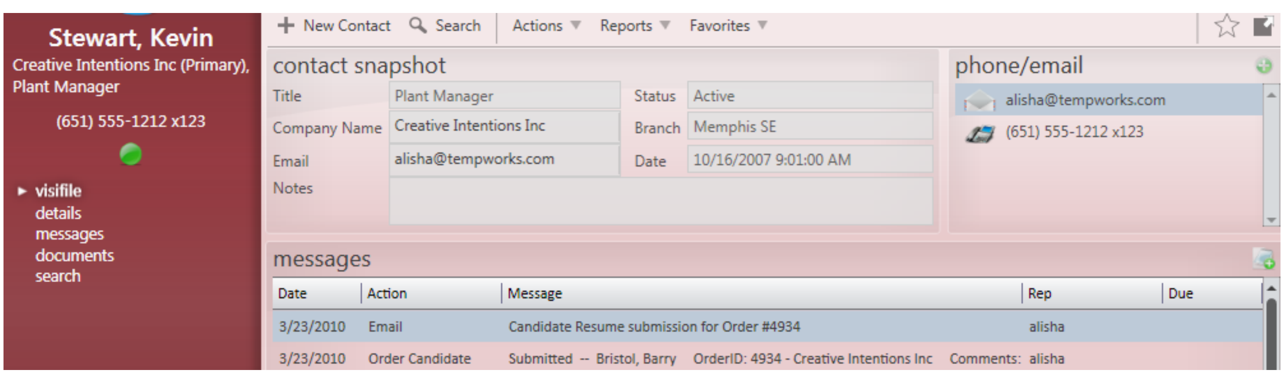
*Note – The documents will be attached to the ***Email*** in whatever file format they are stored as in Enterprise.

7a) Enter Text and Send Email – A resume template can be customized for your company so that it pulls information from the **Order** automatically or you can enter information into the *Subject* field and the text box as shown below. Once all of the information has been entered click the *Send* button.

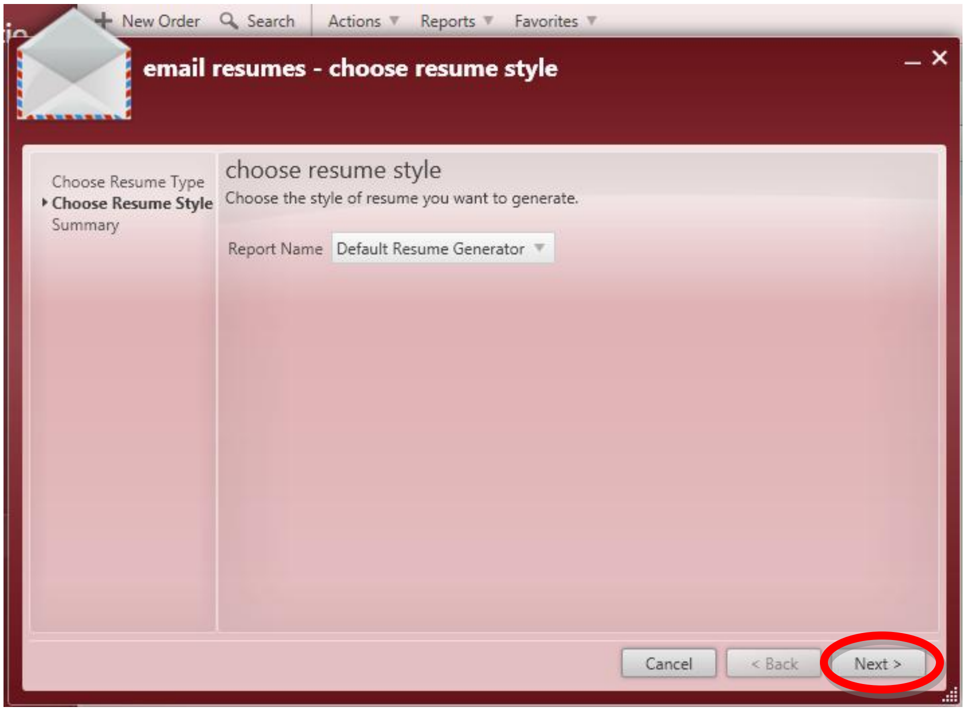


*Note – The system default when using the **Order** resume submission or doing mass ***Emails*** from the **Employee** or **Contact Search** screens is that the recipient(s) are put into the *BCC* field. For this reason the **Order** "Supervisor" will be listed in the *BCC* field. You can cut and paste them to the *To* field and then click on the two-way toggle button for *Hide BCC*. The ***Email*** will now look similar to the one above.

8) Link Message to Order - The ***Email*** will automatically log a ***Message*** on the **Contact's** record with the *Subject* and text of the ***Email*** sent. Open the ***Message*** and select the **Order** from the *Link Order* drop down menu to display this ***Message*** in the **Order**.

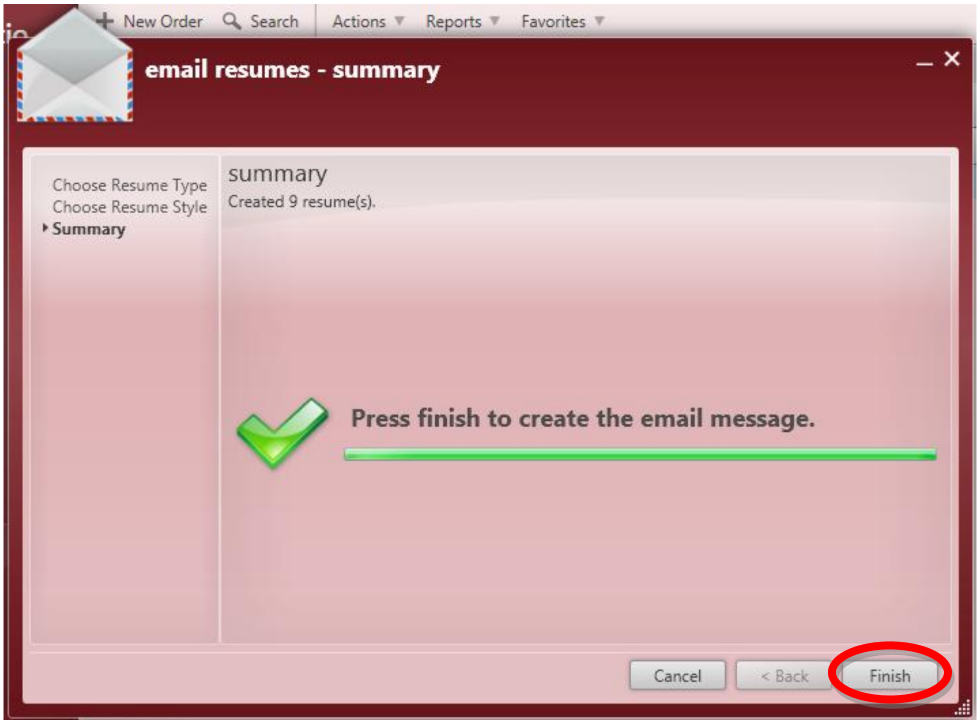


5b) Select Resume Style – If *Generate new Resumes from a Template* is selected, the form below will be displayed after clicking *Next*.



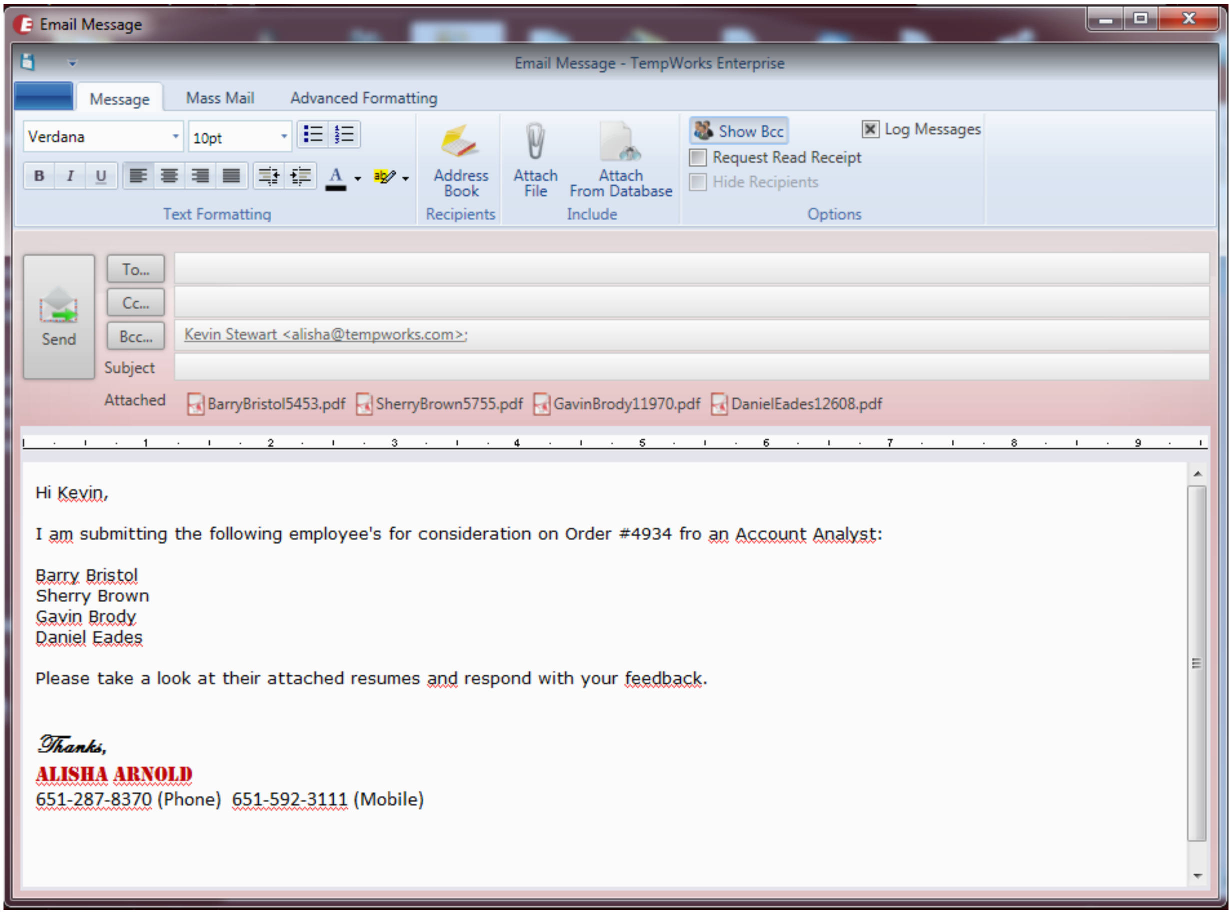
Select the style of resume that should be used by selecting it from the *Report Name* drop down menu. Then click *Next*.

6b) Finish – The resumes will be created and then the screen below will be displayed. Click *Finish* to open the outgoing ***Email*** with the **Employees'** generated resumes attached.



*Note – The documents will be attached to the ***Email*** in PDF format.

7b) Enter Text and Send Email – A resume template can be customized for your company so that it pulls information from the **Order** automatically or you can enter information into the *Subject* field and the text box as shown below. Once all of the information has been entered click the *Send* button.



*Note – The system default when using the **Order** resume submission or doing mass ***Emails*** from the **Employee** or **Contact Search** screens is that the recipient(s) are put into the *BCC* field. For this reason the **Order** "Supervisor" will be listed in the *BCC* field.

Follow step 8 on page 6 of this document to link the ***Email Message*** to the **Order** record.

*Note – To edit a previously uploaded resume, right-click on the resume from the **Employee's Documents** form and choose *Edit Information*. When the ***Documents*** window opens, change the *Description* and click *Save* to update. This will be necessary if the document was added by using the **Resume Parser**.

<u>Still Have Questions?</u>

For more information about submitting resumes contact our customer support group at 651-452-0366 or by sending an email to support@tempworks.com.

To submit suggestions on how to improve this document or to request documentation on other Enterprise functionality please contact Alisha Arnold (Corporate Trainer) at 651-287-8370 or by sending an email to Alisha@tempworks.com.