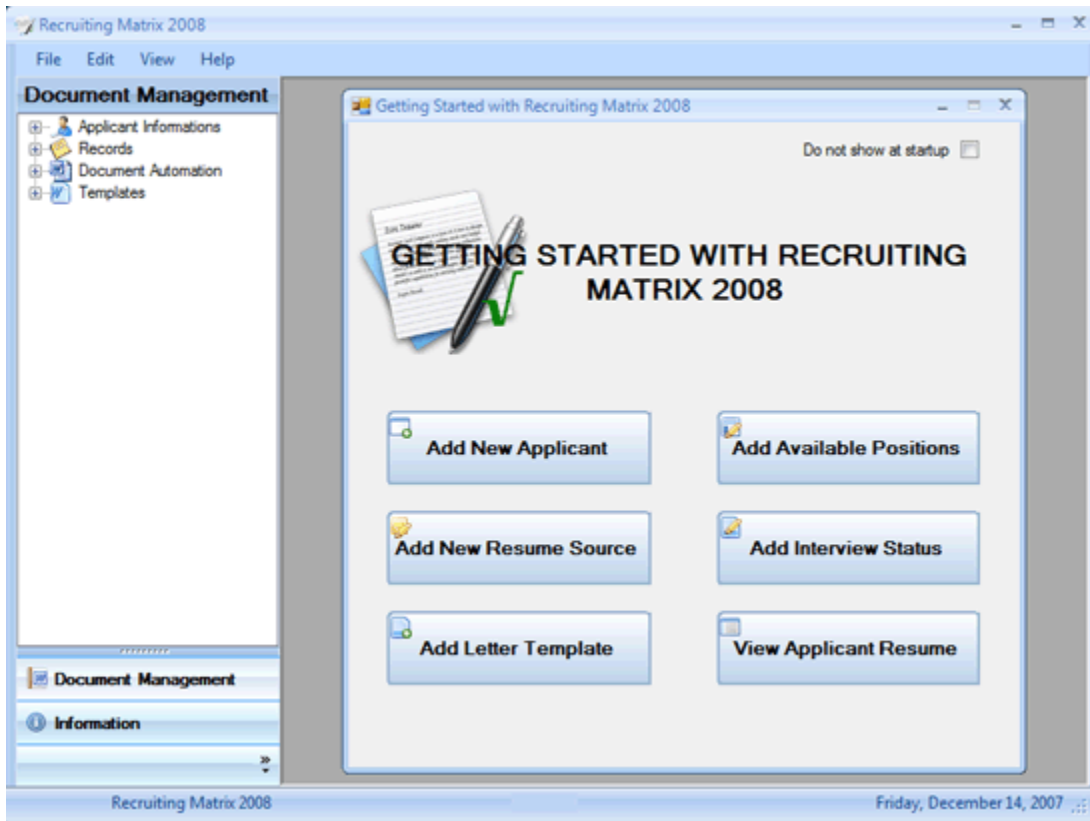




# Application Screen







The Application Getting Started Screen is display when the Recruiting Matrix 2008 Application is Started.

Navigation - The application has navigation tree, which allows you to navigate the application. To input a New Applicant information, click on the  Add in the Applicant informations

The Navigation Menu has the following Items:

**Applicant Information** -  Within this you could perform operation such as

-  Add New Applicant Information
-  Edit Applicant Information
-  Delete Applicant Information
-  View Applicant Resume

## Microsoft Word Template

Before you can create automated letter, you must first create a microsoft word template which define the bookmark name that is used by Recruiting Matrix Application to merge a letter.



This template must contain bookmark name listed below.

- Title
- Title1
- Firstname
- Initial
- Lastname
- Suffix
- Address
- City
- State
- ZipCode
- Greetings

Note: That the above bookmark name are case-sensitive

In microsoft Word/office 97, 2000, XP or 2003 click the **Insert** menu item, and click **bookmark**, In the bookmark dialog screen, type the name in the bookmark name field and then click the **Add** button

In microsoft Word/office 2007 click the **Insert** Tab, and click **bookmark**, In the bookmark dialog screen, type the name in the bookmark name field and then click the **Add** button

To Add the template, Click the Templates tree menu  and then click the Add Template . In the Add Automation Letter Templates Screen Click the **Browse** button and then locate the template. In the **Display Name**, type the name you want to give to the template. To Use this template make sure that the **Allow Document For Merge** and the **Allow Document For Bookmarks** are checked. Then Click the **Add Template** button

Once the template is uploaded, it will be displayed in the List of Available Templates.

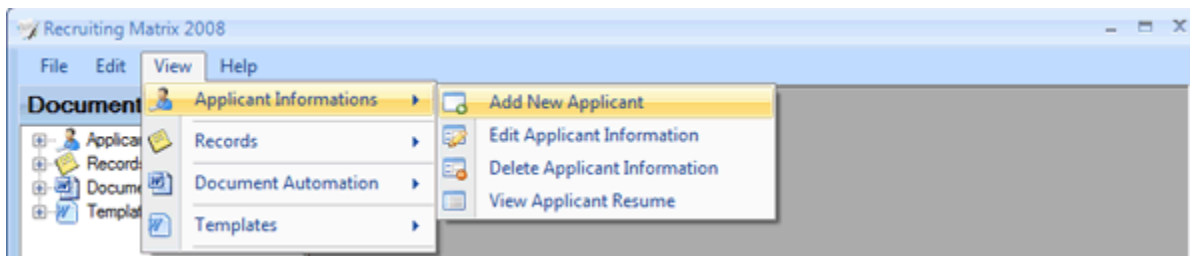
# How To Add New Applicant

The screenshot shows the 'Add New Applicant Information' form in the Recruiting Matrix 2008 application. The form is populated with the following data:

- Title: Mr.
- Firstname: James
- Initial: J
- Lastname: Jones
- Goes By Name: Jamie
- Suffix: Jr.
- Year of Graduation: 1955
- Permanent Address: 23 Dundun Street
- City: Providence
- State: RI
- Zip Code: 02907
- Home Phone: 4010002322
- Mobile Phone: 4010002322
- Email: J\_Jones@heyme.com
- Other Address: (empty)
- Other Phone: (empty)
- School Attended: (empty)
- Current Employer: (empty)
- Position: (-Select a Positi)
- Date Resume Submitted: 12/19/2007
- Status: (-Select a Statu)
- Interview Status: (empty)
- Comments: (empty)
- 1st Interview Date: 12/19/2007
- 2nd Interview Date: 12/19/2007
- 3rd Interview Date: 12/19/2007
- Referred By: (empty)
- Interviewed By: (empty)
- Resume Source: (empty)
- Resume Upload: (empty)

Buttons at the bottom of the form include 'Add', 'Cancel', and 'Browse'.

On the navigator tree click on the **Applicant Informations** and then click on **Add** or click **View** on the toolbar and then click **Applicant Infomation** and click **Add New Applicant**. See illustration below:

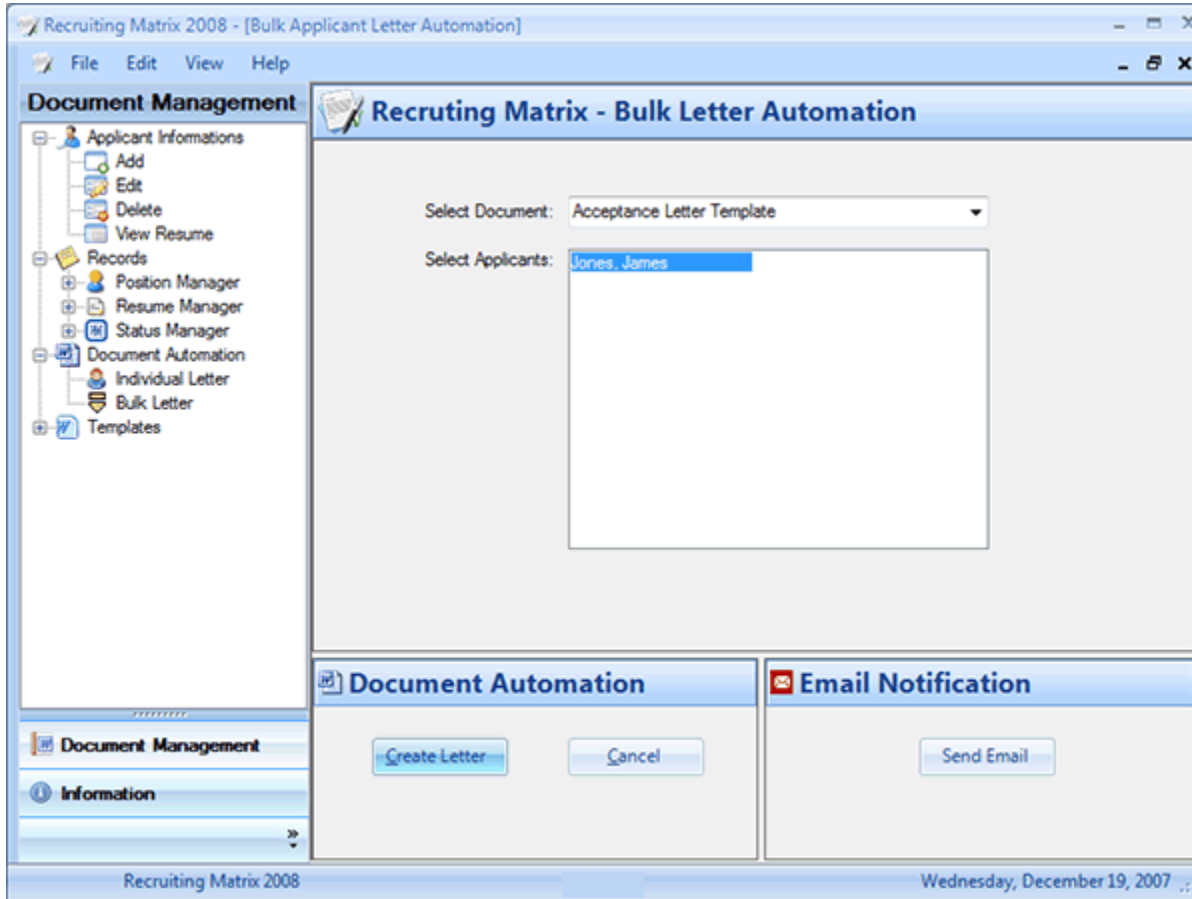




Enter the necessary information in the field. Below are list of required fields

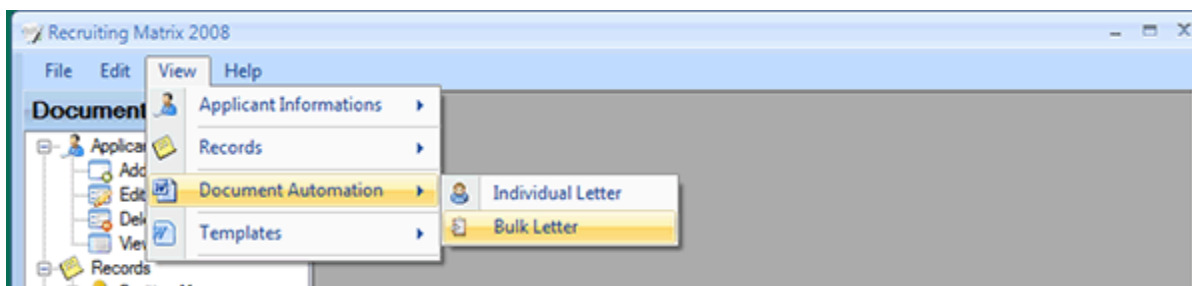
- Title
- Firstname
- Lastname
- Permanent Address
- City
- State
- Home Phone
- Email Address

Use the **Browse** button to upload Applicant Resume. Then Click on the **Add** button. The Applicant information is stored in the database and a copy of the applicant resume is uploaded to a directory that you define during installation

## How To Create Individual and Bulk Letters

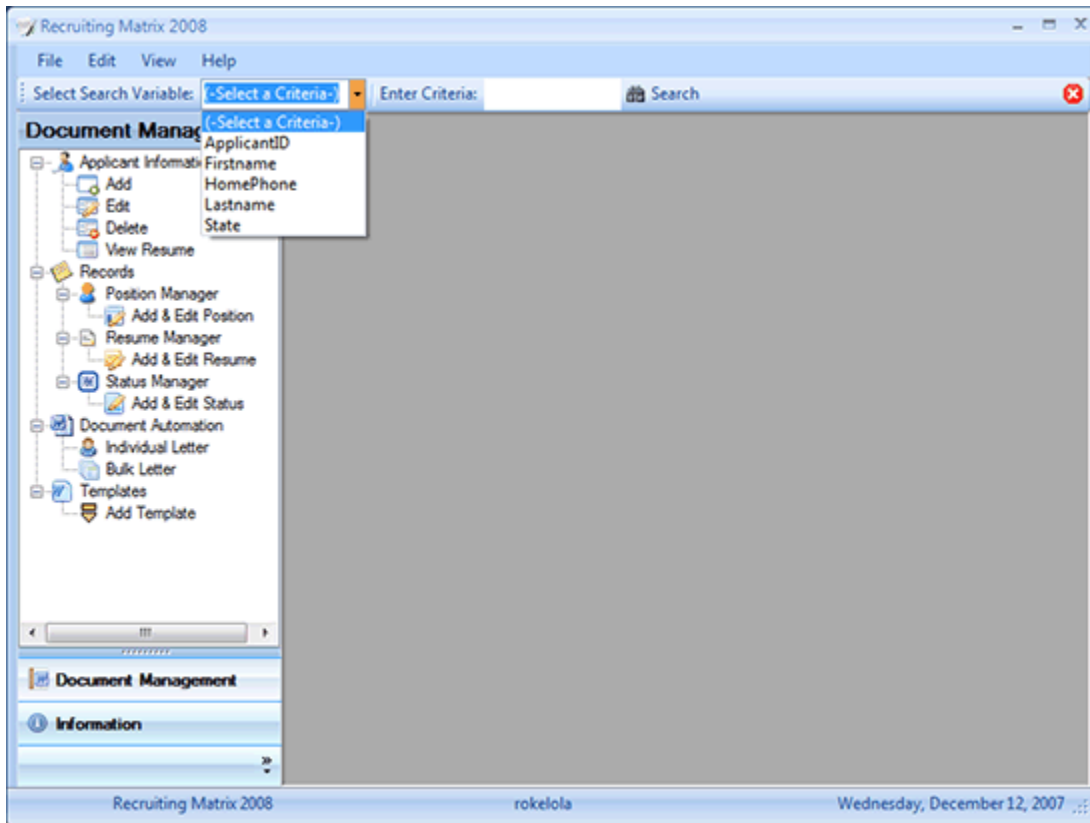


To create a Bulk or individual Letter, In the Navigation Tree under Document Management, Click on  **Document Automation**, then click on  **Bulk Letter** or click on **View** on the Toolbar, then click **Document Automation** and then click on **Bulk Letter**. See illustration below:

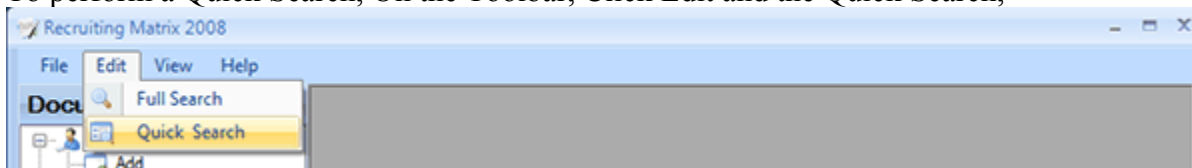


Once the Bulk Letter Automation Screen loads up, In the **Select Document** field Select the Letter template to use and in the **Select Applicants** field, Select the applicant that you want to create Letter for. For multiple Applicant Letter, Hold that the **Ctrl** key on your keyboard and the use your mouse to select the applicants that you want to create letters, then click the **Create Letter** button

# How To Do A Quick Search

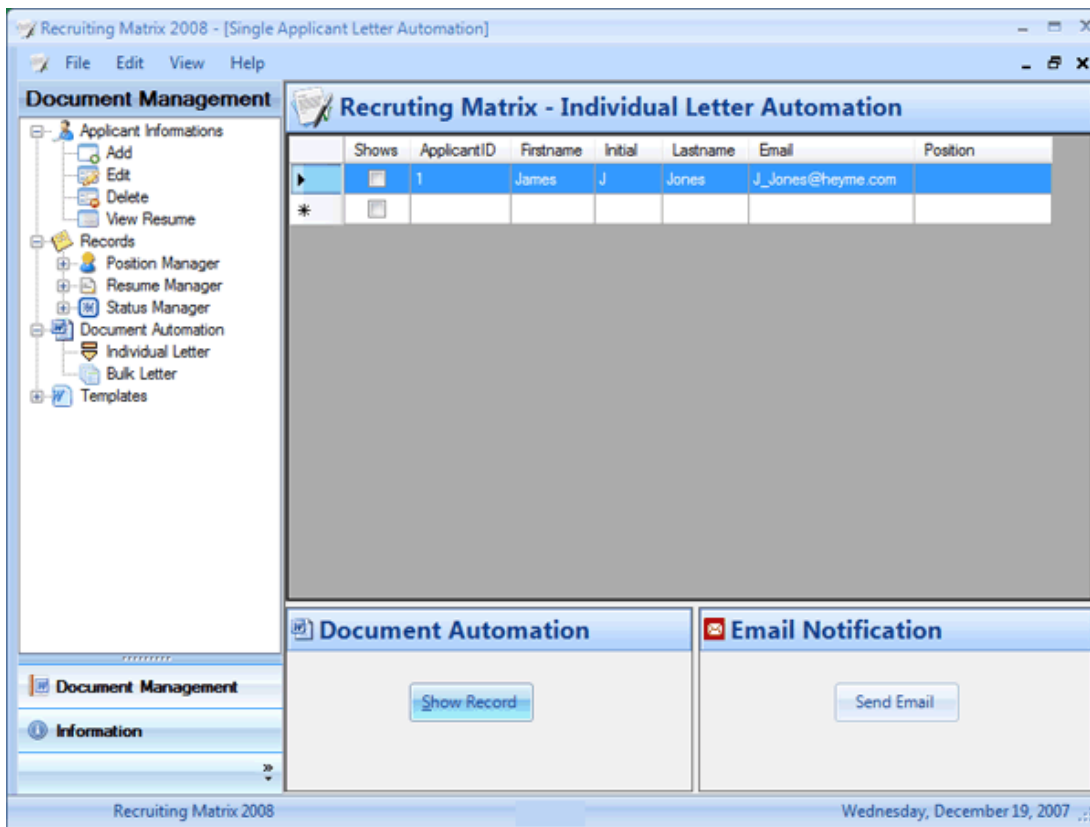




To perform a Quick Search, On the Toolbar, Click Edit and the Quick Search,

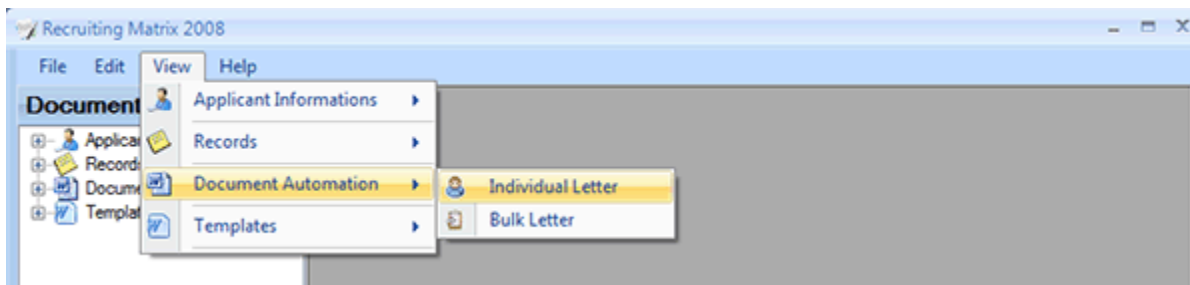


On Menu bar, In the **Select Search Variable** Field, Select a Search Criteria and in the **Enter Criteria** field, enter the applicant information you want to search, and then click the **Search** button

# How To Create Letters



To create an individual Letter, In the Navigation Tree under Document Management, Click on  **Document Automation**, then click on  **Individual Letter** or click on **View** on the Toolbar, then click **Document Automation** and then click on **Individual Letter**. See illustration below:



Once the Individual Letter Automation Screen appear check the box under **Shows** corresponding to the name of the applicant you want to create a letter for, then once the Applicant Contact List Screen comes up, **Select a Letter Template** to use and then click the **create Letter** button

Applicant Contact List

Address Information Contact Information

Applicant ID: 1 Position:

Title: Mr. Firstname: James Initial: J Lastname: Jones Suffix: Jr.

Street Address: 23 Dundun Street

City: Providence State: RI Zip Code: 02907

Documents Automation

Select a Letter Template: -Please Select-

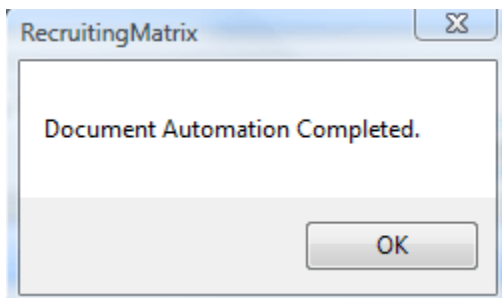
Create Letter

Email Notification

Send Email

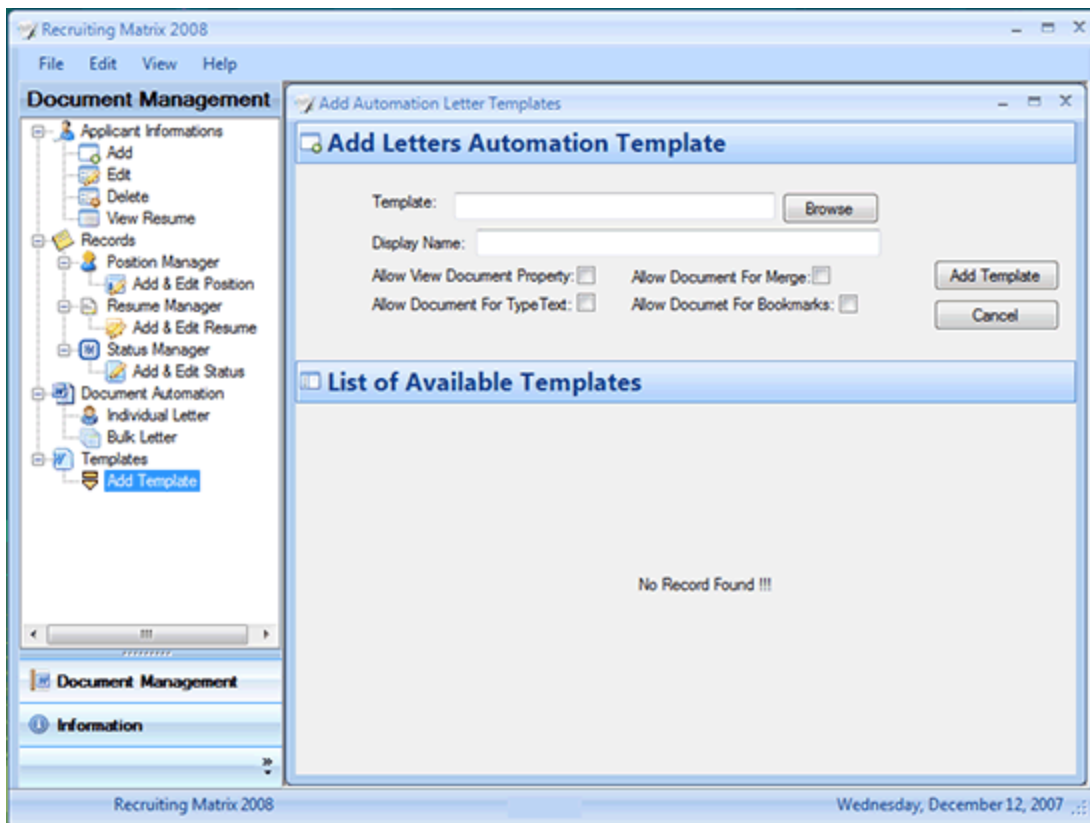
Close

Once the Letter is created, then click **OK** on the confirmation screen,

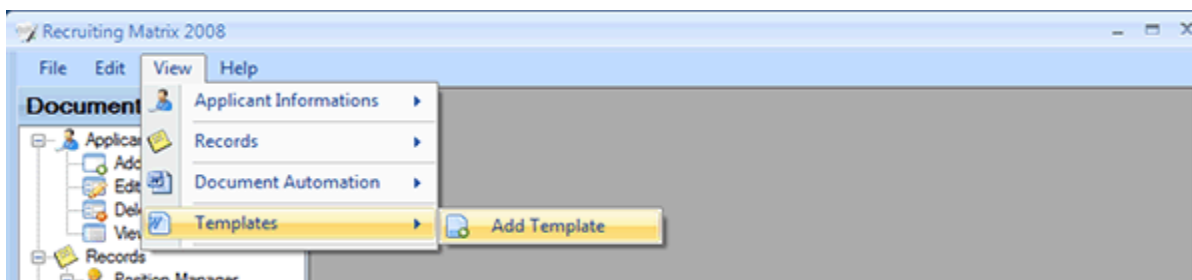


Then go the folder that you define for the storage of Letter during installation to get the letter.  
**Note:** Letter are saved as **Firstname + Lastname.doc**

## How To Add New Template



Click on the Navigation Tree in Document Management, Then click on **Templates** then click on **Add Template** or click on **View** on the Toolbar, then click on **Templates**, then then click on **Add Template**  
See illustration below:

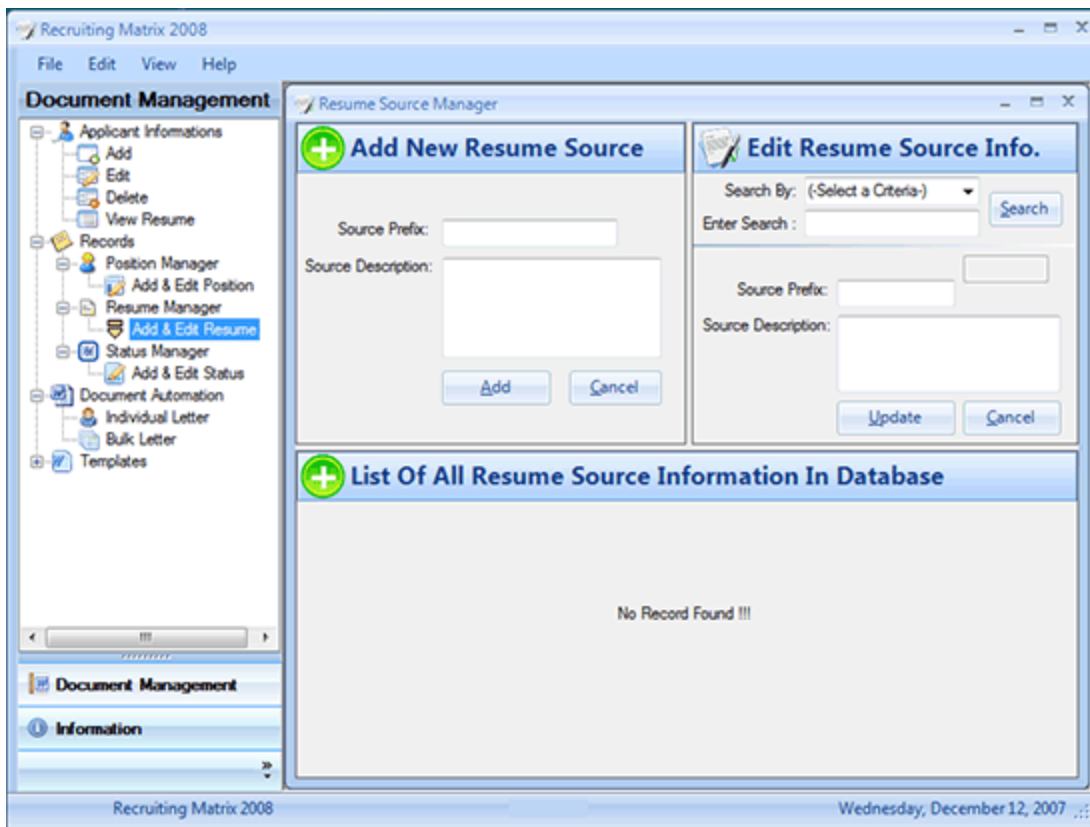


In the Add Automation Letter Templates Screen  
Click the **Browse** button and then locate the template. In the **Display Name**, type the name you want to give to the template. To Use this template make sure that the **Allow Document For Merge** and the **Allow Document For Bookmarks** are checked. Then Click the **Add Template** button

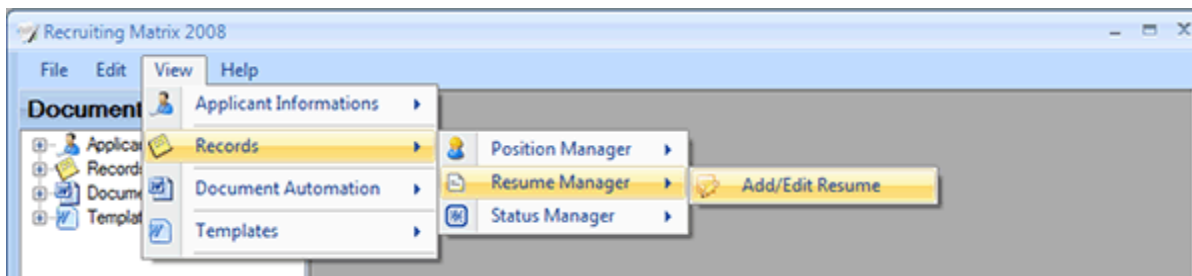
Once the template is uploaded, it will be displayed in the List of Available Templates.

## How To Add Resume Source



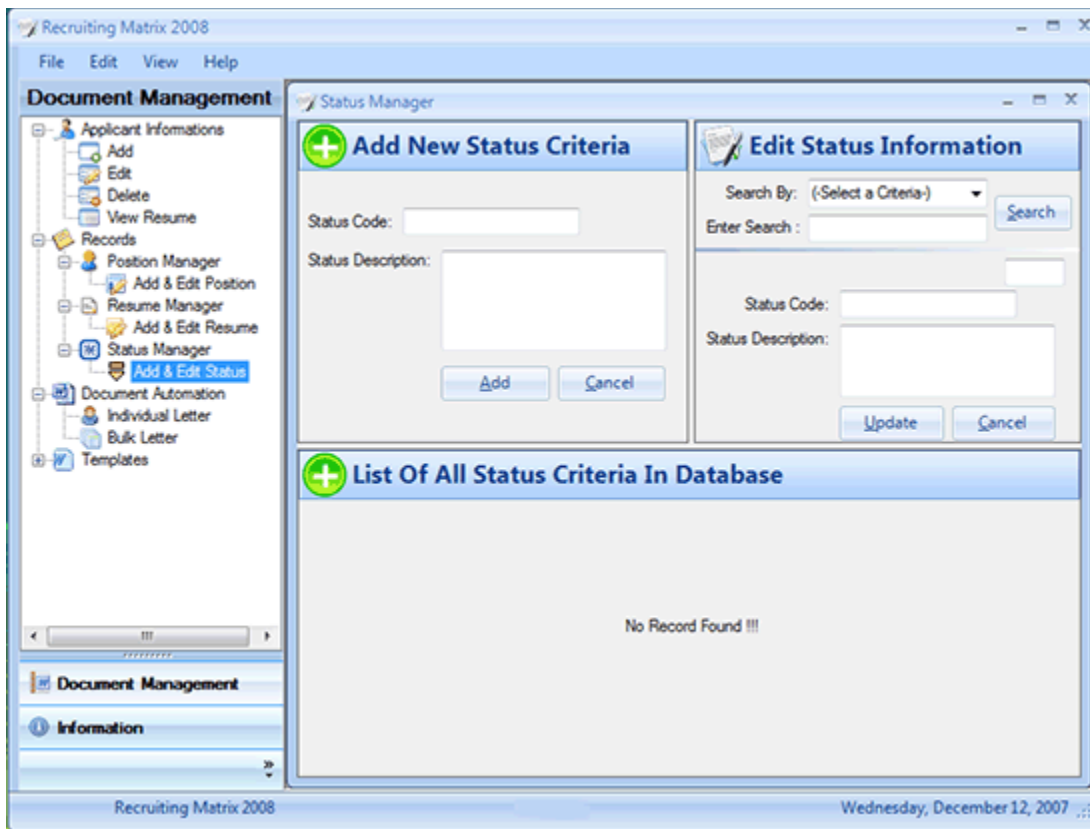


Click on the Navigation Tree in Document Management, Then click on **Records** then click on **Resume Manager** and then click on **Add & Edit Resume** or click on **View** on the Toolbar, then click on **Records**, then click on **Resume Manager** and then click on **Add/Edit Resume**. See illustration below:

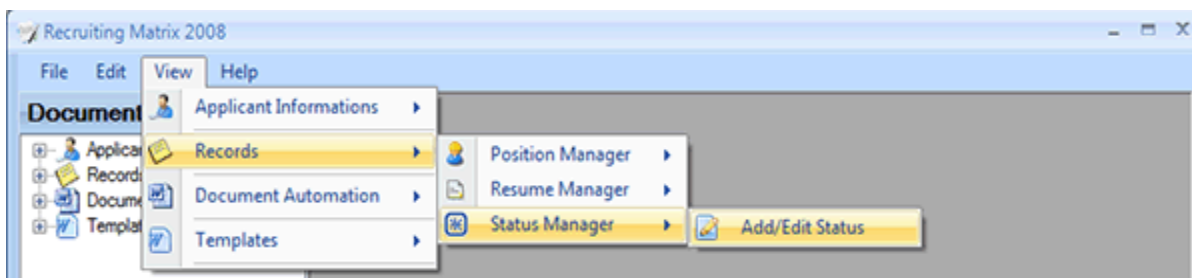


To Add Resume Source, Enter the necessary information in the **Source Prefix** and the **Source Description** Field and then click the **Add** button. Once the information is added to the database, it will be listed in the **List of All Resumes Source Information In Database**.

## How to Add New Status Criteria

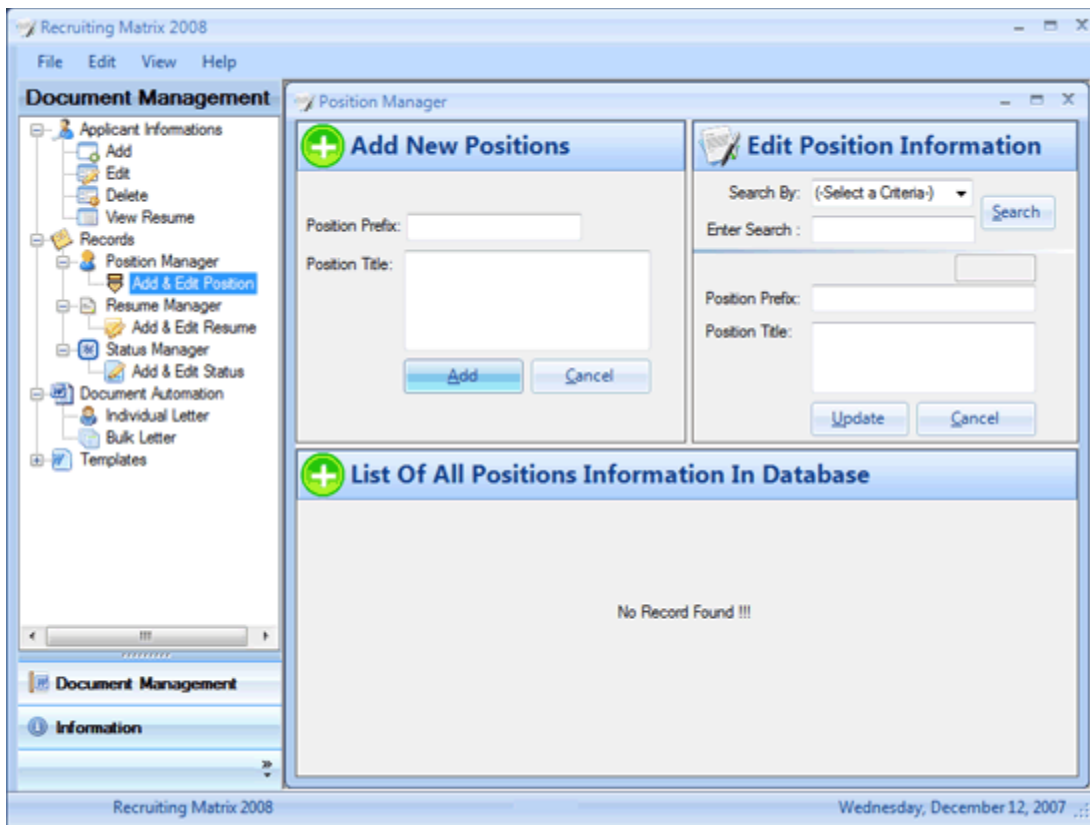


Click on the Navigation Tree in Document Management, Then click on **Records** then click on **Status Manager** and then click on **Add & Edit Status** or click on **View** on the Toolbar, then click on **Records**, then click on **Status Manager** and then click on **Add/Edit Status**. See illustration below:

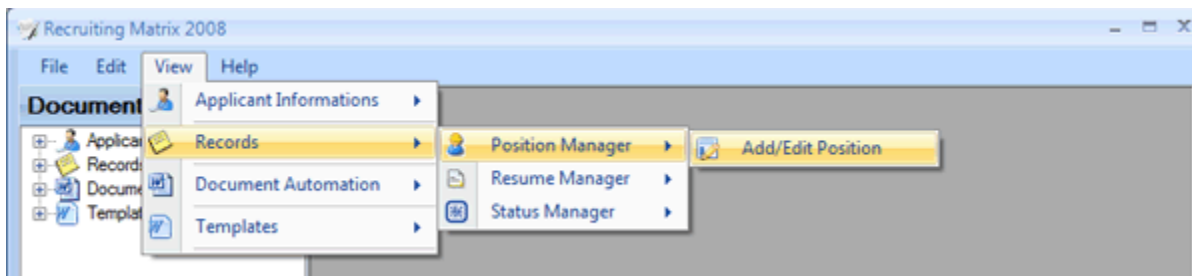


To Add Status Criteria, Enter the necessary information in the **Status Code** and the **Status Description** Field and then click the **Add** button. Once the information is added to the database, it will be listed in the **List of All Status Criteria In Database**.

## How To Add New Position

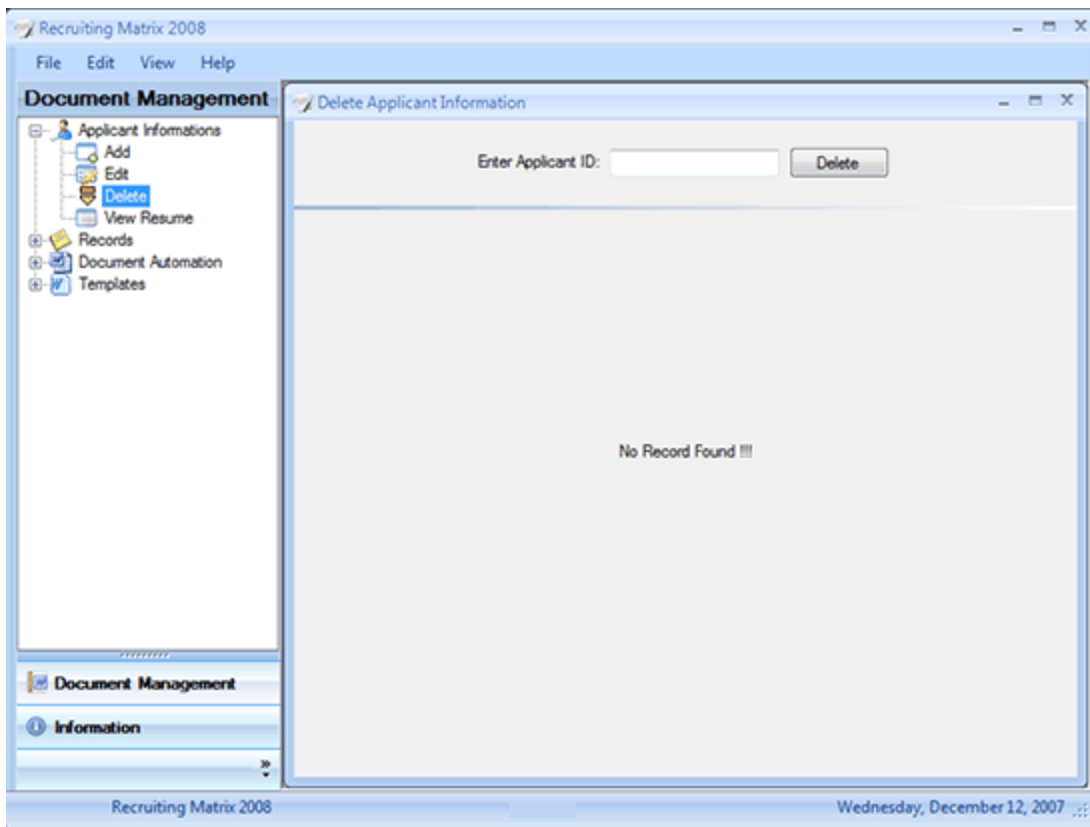




Click on the Navigation Tree in Document Management, Then click on **Records** then click on **Position Manager** and then click on **Add & Edit Position** or click on **View** on the Toolbar, then click on **Records**, then click on **Position Manager** and then click on **Add/Edit Postion**. See illustration below:

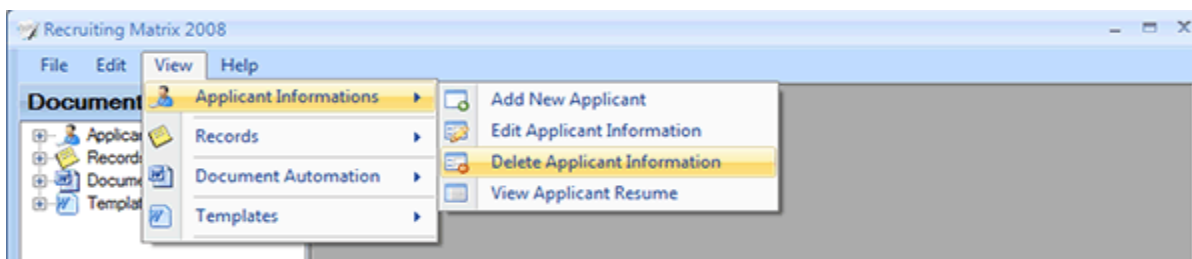


To Add Position, Enter the necessary information in the **Position Prefix** and the **Position Title** Field and then click the **Add** button. Once the information is added to the database, it will be listed in the **List of All Positions Information In Database**.

## How To Delete an Applicant Record

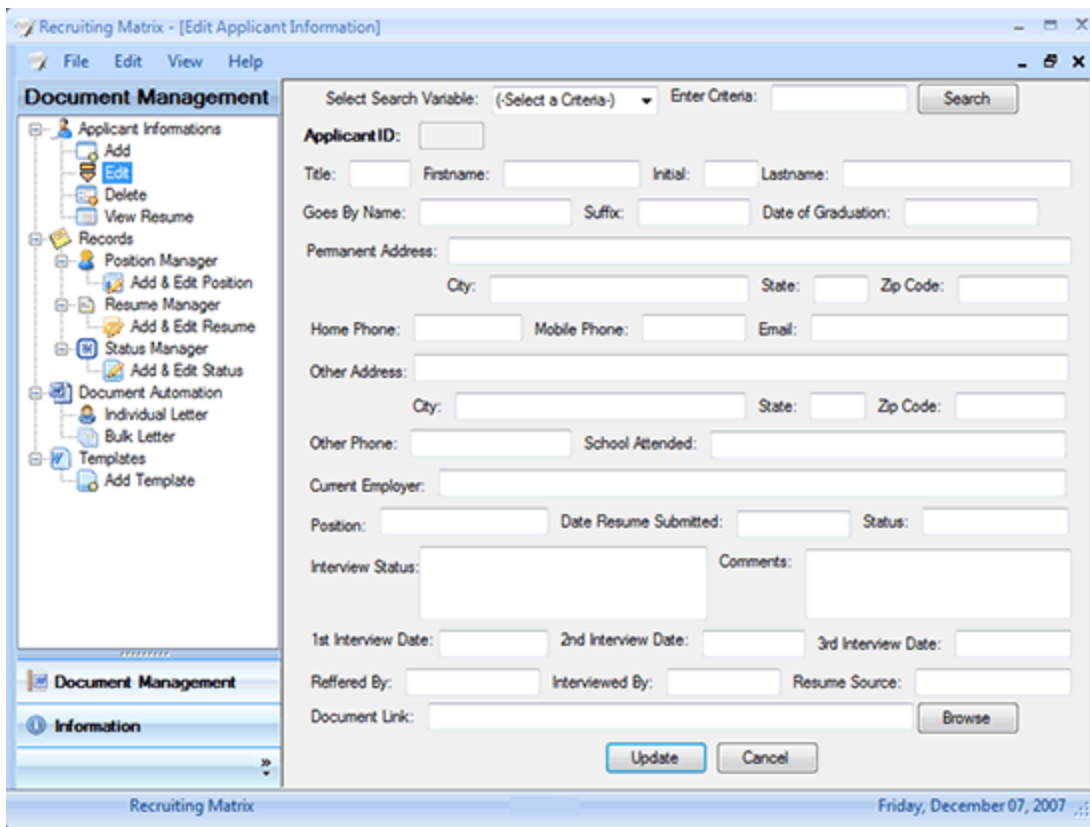




To Delete an Applicant Record, In the Navigation Tree under Document Management, click on the  **Applicant Informations** and then Click on  **Delete** or click **View** on the toolbar and then click **Applicant Infomation** and click **Delete Applicant Information**. See illustration below:

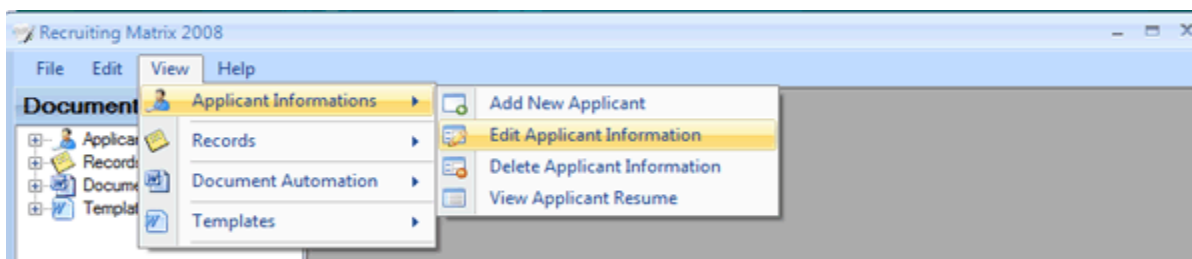


In the **Enter the Applicant ID** field, Enter the Applicant ID that you want to delete and then click the Delete button, then click **OK** to confirm deletion.

## How To Edit Applicant Information



To Edit Applicant Information, on the Navigator Tree under Document Management, click on the  **Applicant Informations** and then Click on  **Edit** or click **View** on the toolbar and then click **Applicant Infomation** and click **Edit Applicant Information**. See illustration below:



In the **Select Search Variable** field, Select **ApplicantID** and in the **Enter Criteria** field enter the Applicant ID and then click the **Search** button. After you have enter necessary information then click on the **Update** button.

Note: If there is a need to update the applicant Resume, Click the **Browse** button and then browse to the location of the resume, once done then click the **Update** button