**COATS**

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Last update KAC 4/15/15 3pm

Resume Parsing Version 4.7.0

SITUATION: Version 4.7.0 was created to allow the user to store and search resumes without adding them the Employee Master record. Within the COATS Resume Parser the user will have the ability to create multiple search strings of Boolean data in order to search the bulk of resumes with criteria from Contact, Summary, Objective, Best Fit, Employment, and Skills. The user can add the Employee to COATS and to the desired Job Order once reviewed through the Integrated Solutions/COATS Resume Parser.   If the user desires to use the existing way of search the skills tab within the Job Order they may do so. They must Parse the resume AND add the Employee to COATS or link the resume to an Existing Employee Record in COATS. Any PREVIOUS resumes parsed prior to Version 4.7.0 can still be searched the previous way within the Job Order. In order to search the NEW way the Resume must be parsed into the COATS Resume Parser to grab the new information to search.

SEARCH RESUME LEGEND:
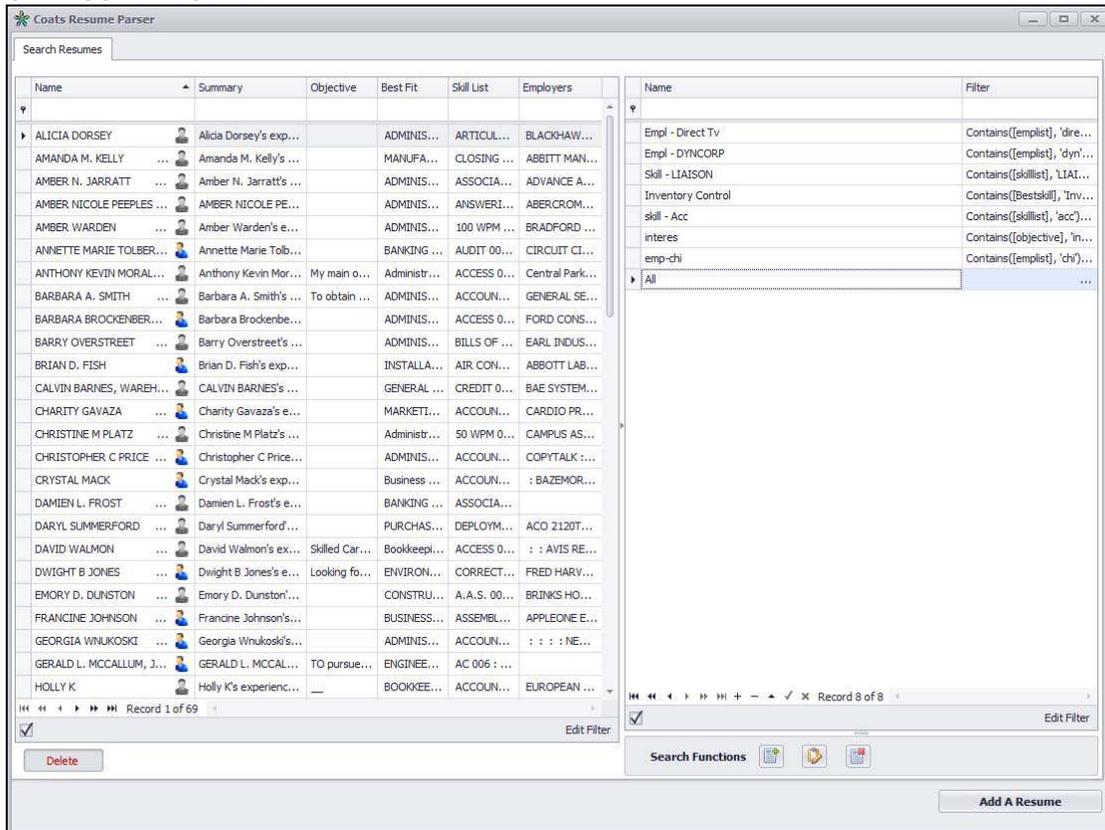
LEFT SIDE OF THE LEGEND:

NAME – Applicant Name of the resume

EMPLOYEE ICON – Blue for Resume linked to Employee Master Record; Grey for Resume not yet linked

SUMMARY – Applicant Summary based upon the parsed resume

OBJECTIVE – Applicant Objective based upon the parsed resume

BEST FIT – Applicant Best Fit titles based upon the parsed resume

SKILL LIST – Applicant list of skills based upon the parsed resume

EMPLOYERS – Applicant list of Employers based upon the parsed resume

⏮ ⏪ ◀ ▶ ⏩ ⏭ + − ▲ ✓ ✗ Record 2 of 8 .

⏮ **-** takes the user to the very top of the available Applicant resumes

◀◀ **-** takes the user page by page to the available Applicant resumes

◀ **-** takes the user one by one through the available Applicant resumes

▶▶ **-** takes the user page by page to the available Applicant resumes

▶▶�byte **-** takes the user to the very bottom of the available Applicant resumes

Record 2 of 8 **-** show the user which current Applicant resumes they are on amongst all the avaialbe Applicant resumes.

☑ ▼ **or** ☐ ▼ **when** 🔍 All **is selected -** shows all Applicant Resumes in the COATS Resume Parser

☐ Contains([Best Fit], 'Common') **-** Deselected shows all Applicant Resumes in the COATS Resume Parser

☑ Contains([Best Fit], 'Common') **-** Selected shows the filter of the active Search String of all Applicant Resumes in the COATS Resume Parser

Delete **-** Delete selected Applicant Resume; NOTE: This only deletes their Resume within the COATS Resume Parser; this does not delete them as an Employee in the COATS Employee Master Record section. If the Resume had been linked to the Employee it will be removed.

RIGHT SIDE OF THE LEGEND:

NAME – Name of Search String

FILTER – Filter description of Search String

⏮ ◀◀ ◀ ▶ ▶▶ ▶▶�byte + − ▲ ✓ ✕ Record 2 of 8 :

⏮ **-** takes the user to the very top of the available Search Strings

◀◀ **-** takes the user page by page to the available Search Strings

◀ **-** takes the user one by one through the available Search Strings

▶▶ **-** takes the user page by page to the available Search Strings

▶▶�byte **-** takes the user to the very bottom of the available Search Strings

+ **-** allows the user to add a Search String

− **-** allows the user to delete a Search String

✓ **-** allows the user to edit the name of a Search String

✕ **-** allows the user to end the edit process if the user had selected the check box

Record 2 of 8 **-** show the user which current Search String they are on amongst all the avaialbe Search Strings

☑ ▼ **or** ☐ ▼ **-** if the user is using the | Name | Filter | search at the top right of the window to Search the available Search String titles. A check indicates an active Search.

☑ Starts with([Name], 'mark') **-** shows the details of the active search string from above when in use.

Edit Filter **-** Allows the user to Edit the active search of the current Search Strings in the COATS Resume Parser

📋 **-** Add Search Funtion Filter

📝 **-** Save Search Function Filter

📋 **-** Delete Search Function Filter

Add A Resume **-** Add a Resume to the COATS Resume Parser

Search Resumes **-** Search Resumes with the COATS Resume Parser

CONTACT/SUMMARY LEGEND:

CONTACT/SUMMARY – Applicant name, address, phone(s), resume(s), COATS ID# (if linked to Employee record within COATS) Date scanned, Resume Summary (defined by Sovren), Job Objective details, Security Clearance, Best Fit and percentage of Best fit and Sub Categories of Best fit with percentages and if applicable certificates, descriptions, and dates.

EMPLOYMENT HISTORY – Tabs review the Applicant's employment history including, if parsed; Employer Name, Division/Dept., Position Title, Start Date, End Date, City/State, details of employment.

**MILITARY HISTORY** – Applicant Military History Summary based upon the parsed resume

EDUCATION HISTORY – Tabs review the Applicant's Degree Type, Name, Major, School, City/State, Start and end dates and if graduated.

SKILLS – Applicant Best Fit titles based upon the parsed resume

SKILL LIST – Applicant list of skills based upon the parsed resume

RESUMES – Applicant list of Employers based upon the parsed resume

ADD A RESUME LEGEND:
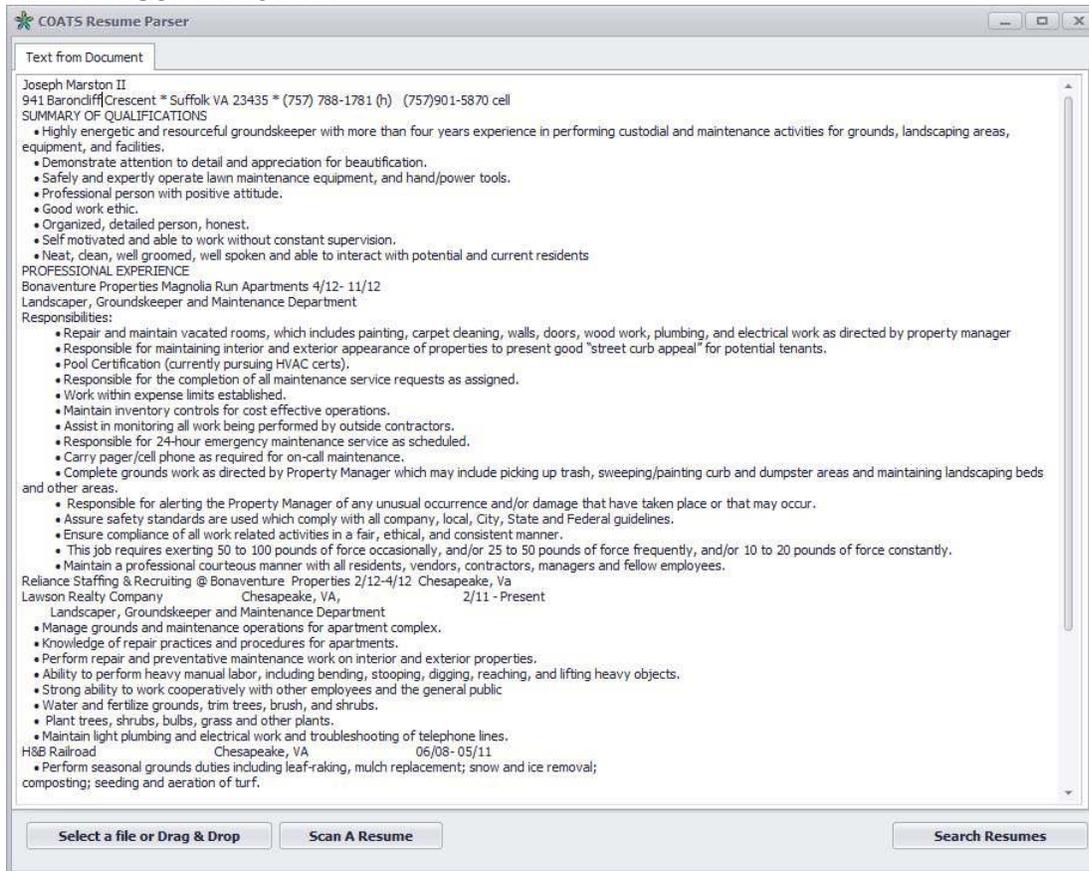
TEXT FROM DOCUMENT – Text of the active Resume (blank if a resume has not yet been parsed/scanned)

SELECT A FILE OR DRAG & DROP – allows user to select a file from a browser window

**SCAN A RESUME –** allows the user to scan a resume

Search Resumes - Allows the user to return to th eSearch Resumes section within the COATS Resume Parser

STEPS:

I. **To ADD an Applicant's Resume from other Resumes sources to the COATS Resume Parser; perform the following steps:**

Important note: The Resume Parsing recognizes **.tif**, **.doc(x)**, and some **.pdf** files created from text.

1. Click **COATS**.
2. Click **Integrated Solutions** on main menu or use the key command **ALT+I**.
3. Click **Resume Parsing**.
4. Click **Add a Resume**.
5. **The user can Select a file or Drag & Drop.**
   a. To Drag/drop, drag/drop into the open window**.**
   b. To Select a file, click **Select a File**, navigate to the file, click **Open** or double click the file.
6. Once the parsing is finished the system will return to the **Search Resumes** screen. The user can find the resume by typing the name or fragment of the name in the name field.
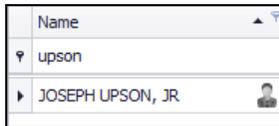
To return to the COATS Resume Parser **Contact/Summary** tab, click (**or**).

The Applicant details will be populated (where applicable) in the Tabs at the top of the COATS Resume Parser. (**Contact/Summary, Employment History, Military History, Education History,** and **Skills**) The user may click on each tab and sub-tabs to review the data.

7. If the user chooses to add the resume only to the resume folder for future searching; no further steps are needed at this time. If the user wishes to add the Resume and create an Employee Master Record in COATS they can under the **Contact/Summary** tab in the COATS Resume Parser. The following screen will appear:
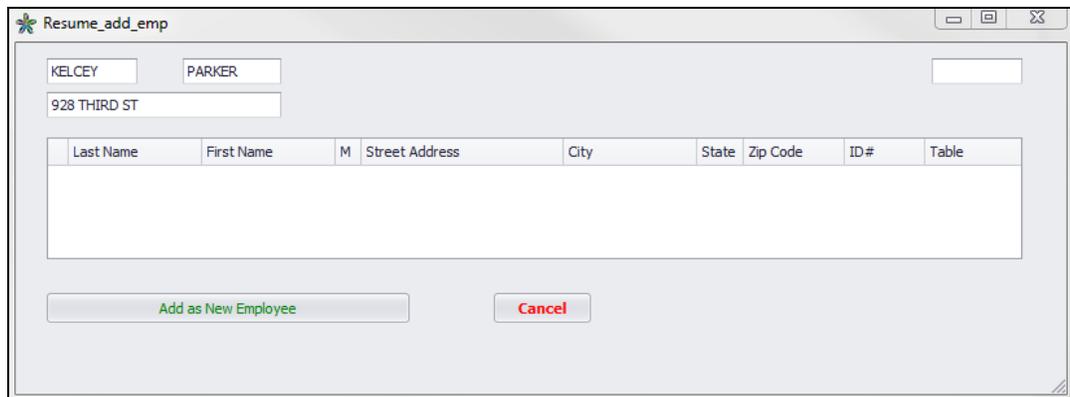

   a. If no other names appear in the window, no other Employees are in the Employee Master Record with the same name. Clicking will create a new Employee Master Record.

   b. If other Employee names appear in the window, there are already other Employee Master Records in COATS with the same name. It is recommended the user click and **Link** the resume to the existing Employee Record. If the user continues to click it will create a new Employee Master Record, possibly creating a duplicate.

   c. To **Link** the Resume to an Existing Employee Record, under the **Contact/Summary** tab in the COATS Resume Parser the user will need to find the desired resume under **Search Resumes**, click (**or**) , click the **Contact/Summary** tab, click the paper icon , the following message will appear, the user will click **OK.**

d. The **Search For an Employee** screen will appear, the user will use the fields to search for the Employee. Once found, the user will click the name, placing a triangle to the left of their name, then double click or press [OK] at the bottom right of the screen.

e. The user will now notice the Employee icon is blue, indicating that this resume is attached to an Employee Master Record in COATS.

8. The user will need to exit the Integrated COATS Resume Parser each time to parse an additional resume.

II. To SCAN an Employee Resume, perform the following steps:

1. Click **COATS**.
2. Click **Integrated Solutions** on main menu or use the key command **ALT+I**.
3. Click **Resume Parsing**.
4. Click **Add a Resume**.
5. Click **Scan a Resume.**
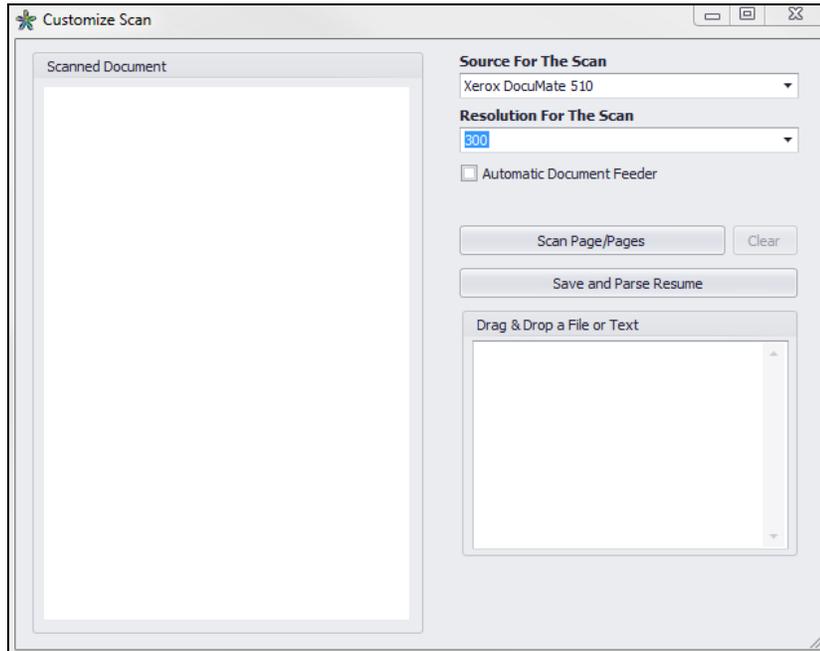
6. The **Resolution For The Scan** should be **300**.
7. Check **Automatic Document Feeder** if scanning multiple pages using a document feeder.
8. **Scan Page/Pages** to start the scanning process.
9. Once scanned and good, click **Save and Parse Resume**.
10. Once the parsing is finished the system will return to the **Search Resumes** screen. The user can find the resume by typing the name or fragment of the name in the name field.
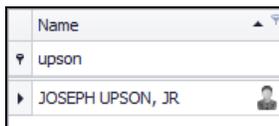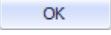

To return to the COATS Resume Parser **Contact/Summary** tab, click , click (**or**).

The Applicant details will be populated (where applicable) in the Tabs at the top of the COATS Resume Parser. (**Contact/Summary, Employment History, Military History, Education History,** and **Skills**) The user may click on each tab and sub-tabs to review the data.

11. If the user chooses to add the resume only to the resume folder for future searching; no further steps are needed at this time. If the user wishes to add the Resume and create an Employee Master Record in COATS they can under the **Contact/Summary** tab in the COATS Resume Parser. The following screen will
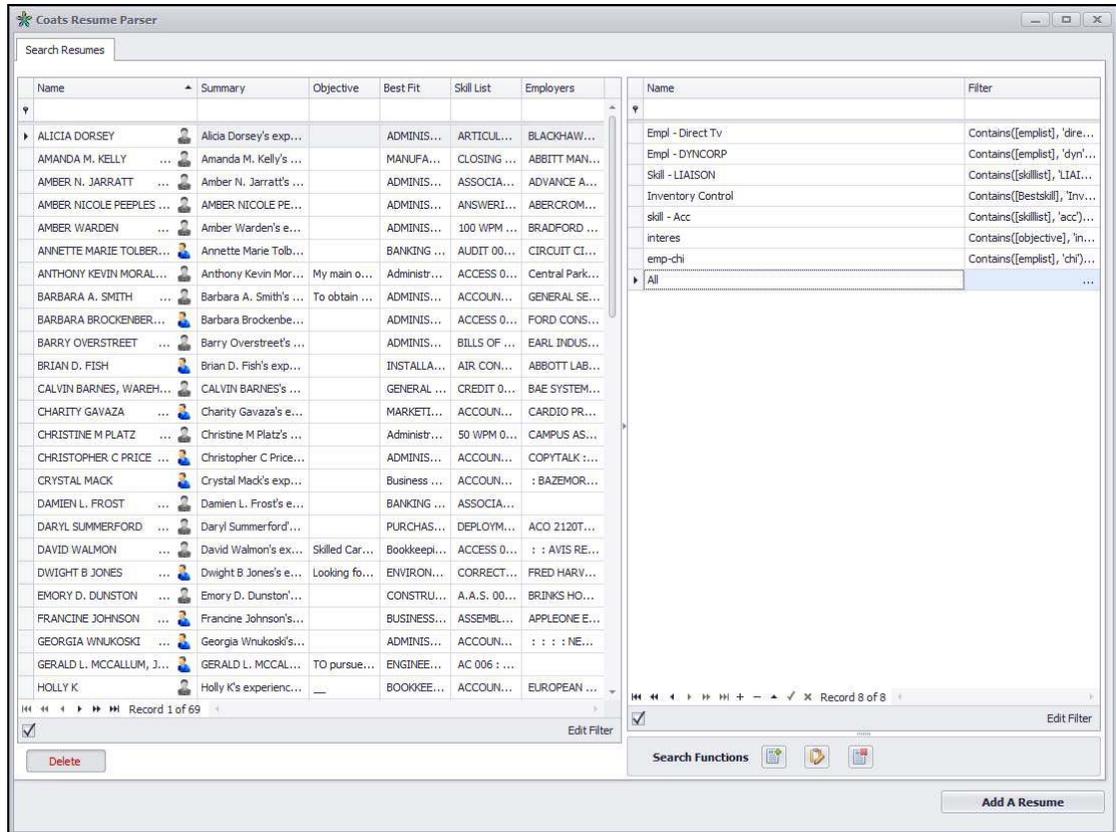
appear:

a. If no other names appear in the window, no other Employees are in the Employee Master Record with the same name. Clicking [Add as New Employee] will create a new Employee Master Record.

b. If other Employee names appear in the window, there are already other Employee Master Records in COATS with the same name. It is recommended the user click [Cancel] and **Link** [ ] the resume to the existing Employee Record. If the user continues to click [Add as New Employee] it will create a new Employee Master Record, possibly creating a duplicate.

c. To [ ] **Link** the Resume to an Existing Employee Record, under the **Contact/Summary** tab in the COATS Resume Parser the user will need to find the desired resume under **Search Resumes**, click (or), click the **Contact/Summary** tab, click the paper icon [ ] , the following message will appear, the user will click **OK.**

d. The **Search For an Employee** screen will appear, the user will use the fields to search for the Employee. Once found, the user will click the name, placing a triangle to the left of their name, then double click or press [OK] at the bottom right of the screen.

e. The user will now notice the Employee icon is blue, indicating that this resume is attached to an Employee Master Record in COATS.

12. The user will need to exit the Integrated COATS Resume Parser each time to parse an additional resume.

III. To SEARCH a Resume within the COATS Resume Parser

NOTES: For Further information on using this filter please access
https://documentation.devexpress.com/#WindowsForms/CustomDocument4340 and scroll into
the end-user-capabilities filter editor.

1. Click **COATS**.
2. Click **Integrated Solutions** on main menu or use the key command **ALT+I**.
3. Click **Resume Parsing**.
4. The **Search Resume** screen appears.

5. The names that appear in the Search Resumes tab are resumes that have been parsed in Version 4.7.0. These employees may or may not be present in the Employee section of COATS. Regardless, the resumes can be searched; the Employees can be added to COATS. If the Employee icon to the right of the name is blue, the resume is linked to an Employee Master Record in COATS.

6. When the user first accesses the Search Resume Screen, the Search Strings list will be blank. **To create a Search:**

   a. Click [icon] , to create a Search
   b. A window will appear, "**Do you want to Add the Current Job Filter?"** click **Yes**. Once the user has created other Search Strings, this will take the search string from the previous search string. The first time it will create the first Search String. The user will see the new Search String under "Enter name here".
   c. To edit the **Enter Name Here** field highlight the entire text to replace the entire text.

d. Click **Edit Filter** on the left side of the window to update the Search String parameters.
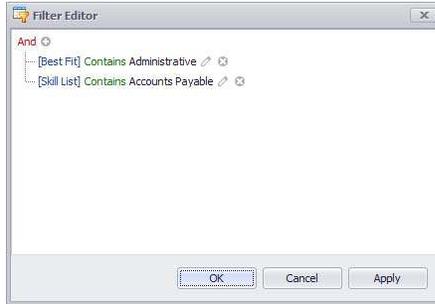
e. Within the Filter Editor the user can click the + button to add additional filters to the search. They can click the X to delete the search string line. They can click And to update the search to be an OR or remain an AND or to see an additional group of filters; such as Add Group.
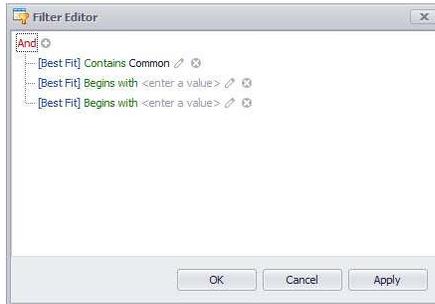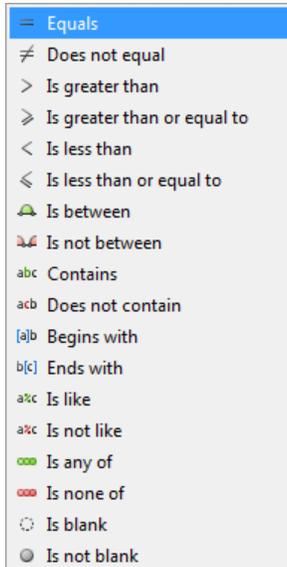

f. Each filter contains three values: [Best Fit], Contains, <enter a value>

- [Best Fit] field can be edited to be

    Best Fit
    Employers
    First Name
    ID#
    Last Name
    Middle Name
    mrecord_id
    Name
    Objective
    Skill List
    Summary

- Contains field can be edited to be

    = Equals
    ≠ Does not equal
    > Is greater than
    ≥ Is greater than or equal to
    < Is less than
    ≤ Is less than or equal to
    △ Is between
    △ Is not between
    abc Contains
    acb Does not contain
    [a]b Begins with
    b[c] Ends with
    a%c Is like
    a%c Is not like
    ooo Is any of
    ooo Is none of
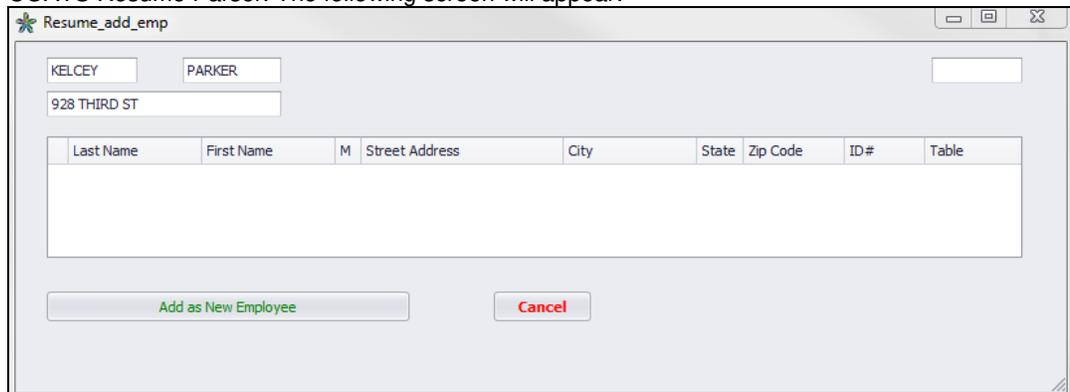   ○ Is blank
    ● Is not blank

- <enter a value> can be edited to be any value entered.

g. The user can click **Apply** to see the results of their filter and then continue to edit where necessary. Once satisfied they can click **OK**.

h. If the edited Search string is accepted by the user, they should update their filter by clicking

   and click **Yes** to **"Do you want to Change the Current Job Filter?"** If the user does not select this and moves to a different Search string the previously created search string will be lost.

i. To **Delete** Search Filters, click on the desired Search String in the right hand column and click

   and click **Yes** to **"Are you sure you want to Delete the Current Job Filter?"**

j. The results of the Search will appear in the Search Resumes tab. If the Employee icon to the right of the name is grey, the resume is not yet linked nor in the Employee Master Record section of COATS. If the Employee icon to the right of the name is blue, the resume is linked to an Employee Master Record in COATS. Refer to Linking a Resume to an Employee Master Record section in order to Link the Resume or to Add the Employee to a Job Order.

IV. To ADD an PARSED Employee into the COATS Resume Parser in Version 4.7.0 to the COATS Employee section, perform the following steps:

1. Click **COATS**.
2. Click **Integrated Solutions** on main menu or use the key command **ALT+I**.
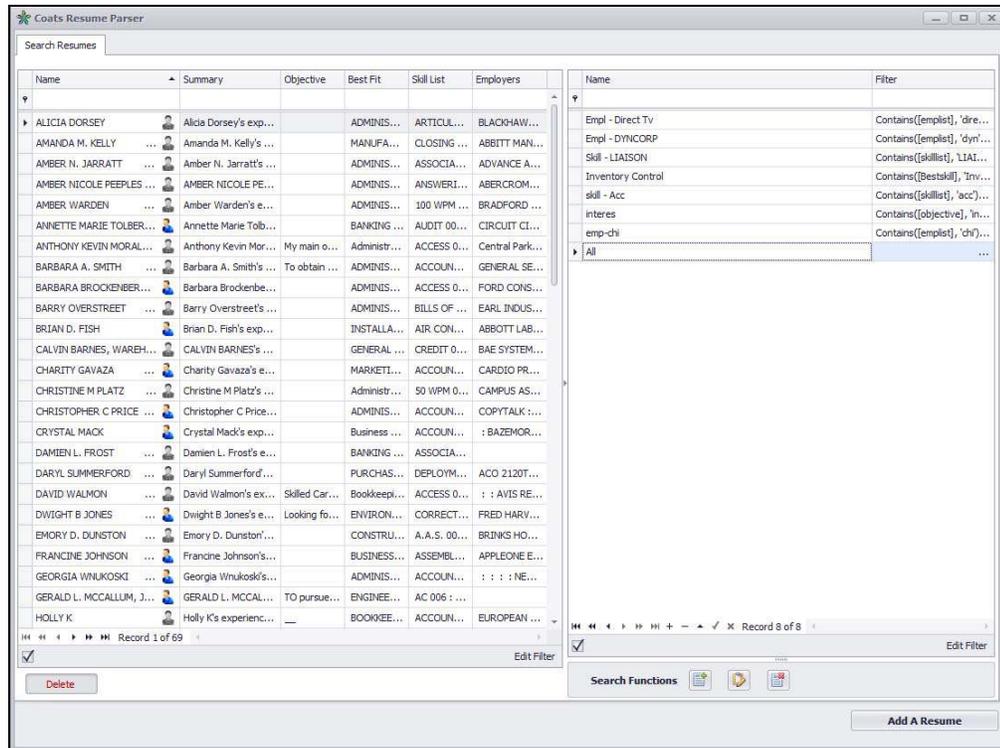3. Click **Resume Parsing**.
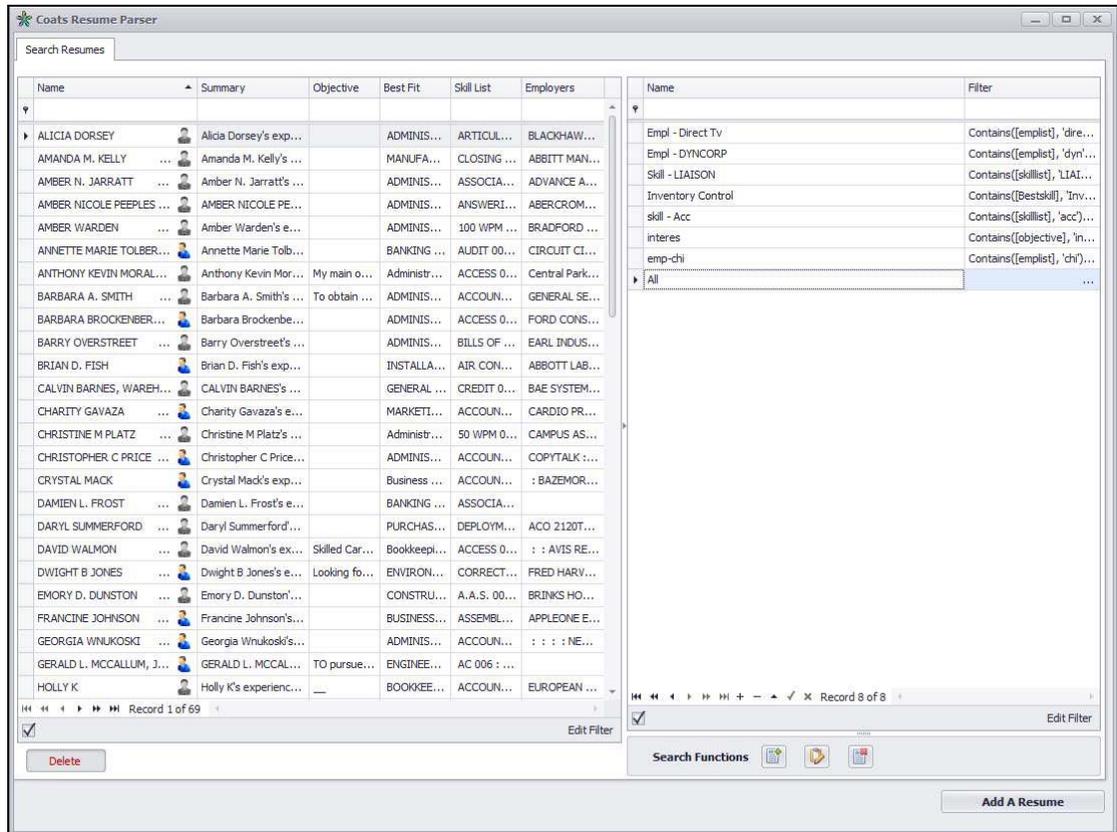
4. The names that appear in the Search Resumes tab are resumes that have been previously parsed Version 4.7.0.
5. Select the Employee to Add to COATS; a triangle or pencil will appear to the left of their name. If the Employee icon to the right of the name is grey, the resume is not yet linked or added to the Employee Master Record sectin of COATS. If the Employee icon to the right of the name is blue, the resume is already linked to an existing Employee Master Record in COATS.
6. To add an Employee to the Employee Master Record section of COATS. The Employee can click the grey Employee Icon to the right of the Employee Name.
7. The **Contact/ Summary** tab will appear, click [COATS] under the **Contact/Summary** tab in the COATS Resume Parser. The following screen will appear:

a. If no other names appear in the window, no other Employees are in the Employee Master Record with the same name. Clicking [Add as New Employee] will create a new Employee Master Record.

b. If other Employee names appear in the window, there are already other Employee Master Records in COATS with the same name. It is recommended the user click [Cancel] and **Link** the resume to the existing Employee Record. If the user continues to click [Add as New Employee] it will create a new Employee Master Record, possibly creating a duplicate.

c. The user will now notice the Employee icon is blue, indicating that this resume is attached to an Employee Master Record in COATS.

V. **To LINK a Resume to an EXISTING Employee Master Record in COATS from the COATS Resume Parser, perform the following steps**
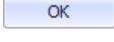
1. Click **COATS**.
2. Click **Integrated Solutions** on main menu or use the key command **ALT+I**.
3. Click **Resume Parsing**.

4. The names that appear in the Search Resumes tab are resumes that have been parsed using Version 4.7.0. If the Employee icon to the right of the name is blue, the resume is linked to an Employee Master Record in COATS.

5. Select the Employee to add to COATS; a triangle or pencil will appear to the left of their name. If the Employee icon to the right of the name is grey, the resume is not yet linked or added to the Employee Master Record sectin of COATS. If the Employee icon to the right of the name is blue, the resume is linked to an existing Employee Master Record in COATS.

6. To [ ] **Link** the Resume to an Existing Employee Record, under the **Contact/Summary** tab in the COATS Resume Parser the user will need to find the desired resume under **Search Resumes**, click (or), click the **Contact/Summary** tab, click the paper icon [ ], the following message will appear, the user will click **OK.**
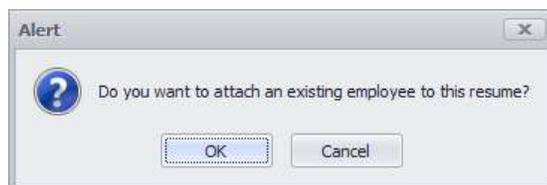
7. The **Search For an Employee** screen will appear, the user will use the fields to search for the Employee. Once found the user will click the name, placing a triangle to the left of their name, then double click or press [OK] at the bottom right of the screen.

8. The user will now notice the Employee icon is blue, indicating that this resume is attached to an Employee Master Record in COATS.

VI. To ADD an Applicant/Employee within the COATS Resume Parser TO AN EXISTING JOB ORDER, perform the following steps:

1. Click **COATS**.
2. Click **Integrated Solutions** on main menu or use the key command **ALT+I**.
3. Click **Resume Parsing**.
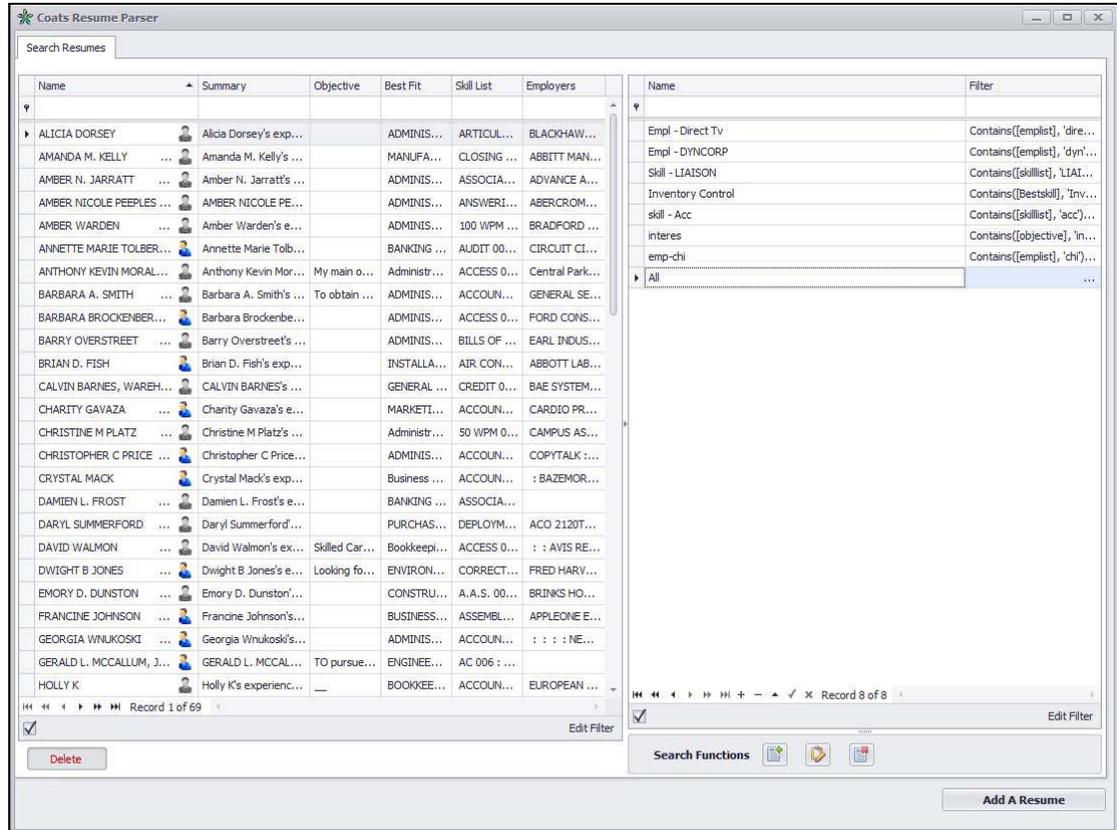
4. The names that appear in the Search Resumes tab are resumes that have been parsed in Version 4.7.0. The employee can use the name field to search for multiple resumes of the same name. The employee icon bolded in blue indicates this resume has been attached to an Employee Master Record in COATS.

   Select the Employee to Add to a Job Order; a triangle or pencil will appear to the left of their name.

5. If the Employee icon is grey, refer first to A**dding or Linking an Employee Resume to an Employee Master Record** sections above.
6. If the Employee icon is blue, click on the Blue icon, the **Contact/Summary** window will appear.
7. Click ⊕ Order , to an Employee to an Existing Job Order in COATS.

8. The following Locate a Job Order screen will appear:


9. Use the fields in order to find the correct Job Order. The user can also sort this screen by using the Open, Closed and All buttons under **Order Filter**.

10. Click or Search the desired Job Order, a triangle will appear to the left of the Client Name. The user can double click to Add the Employee to the Job Order or they can click Select.

11. The user will need to open the Orders, find the Orders to see the Employee added. If the Order is currently active on the screen the user will need to right click the Arrows on the right to refresh the screen for the Employee to appear.

VII. To DELETE an Employee from the COATS Resume Parser to the COATS Employee section, perform the following steps:

1. Click **COATS**.

2. Click **Integrated Solutions** on main menu or use the key command **ALT+I**.

3. Click **Resume Parsing**.
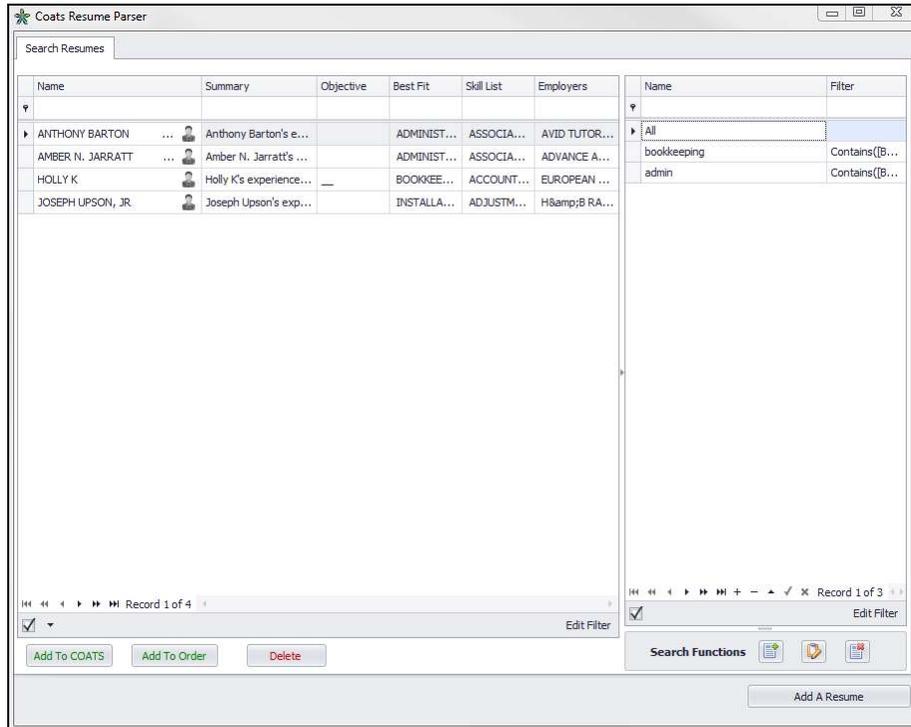
4. The names that appear in the Search Resumes tab are resumes that have been parsed in Version 4.7.0. The employee can use the name field to search for multiple resumes of the same name. The employee icon bolded in blue indicates this resume has been attached to an Employee Master Record in COATS.

   NOTE: This only deletes their Resume within the COATS Resume Parser; this does not Delete them as an Employee in the COATS Employee Master Record section. If the Resume had been linked to the Employee it will be removed.

   Select the Employee to Delete; a triangle or pencil will appear to the left of their name.

5. Click **Delete**, click **OK** to the Alert, **"Are you sure you want to delete this Resume?"**

6. **The resume will be deleted.**

VIII. To EMAIL an Applicant Resume from the COATS Resume Parser, the user has the following choices:

1. Click **COATS**.
2. Click **Integrated Solutions** on main menu or use the key command **ALT+I**.
3. Click **Resume Parsing**.
4. Find the Applicant to edit.
5. Click the Employee icon to the right of their name, the Contact/Summary will appear.

6. The user can email the Original Resume by clicking to the right of **Original Resume**.

   Or

   The user can email the Resume Copy by clicking to the right of **Resume Copy**

   Or

   The user can email the Re-formatted resume by clicking to the right of **Re-Formatted**.
   Each of the options has different results. See below for more details.

   Emailing a resume using the Original Resume:

   The originally scanned resume will be sent to the recipient's email entered in the **COATS Send Mail** window. This resume has not been edited from its original format and may include the applicant's address, phone, and email. Etc.

   The user will click to send the email, click OK to the alert, review the recipient's email, update the Subject line and body of email and click **Send Email.**

   Emailing a resume using Resume Copy:

   COATS will allow the user to copy the Original Resume Format, edit the copied resume, save the copied resume as a resume copy and email the resume copy. This will be sent to the recipient's email entered in the **COATS Send Mail** window. This resume has been edited from its original format by the user and will include only the details the user kept.

   The user will click to send the email , enter the recipient's email, update the Subject line and body of email and click **Send Email.**

   NOTE: Typically this option is used for Direct/Hire and Temp to hire positions where the original format but edited format is desired.

   Emailing a resume using the Re-Formatted Resume:

   COATS will take the text of the original resume and reformat the resume into a Standard COATS Resume format. This will be sent to the recipient's email selected in the **Search For a Client** window. This resume has been edited from its original format will not include the applicant's address, phone, email. Etc.
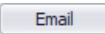
   The user will click **,** select the desired receipients in the **Search for a Client** Window, and click , click OK to the alert, review the recipient's email, update the Subject line and body of email and click **Send Email.**
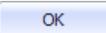
    NOTE: Typically this option is used for temporary positions where the re-formatted text is desired for multiple applicant submissions.

IX. To EDIT an Applicant's Resume Copy from the COATS Resume Parser, perform the following steps:

1. Click **COATS**.

2. Click **Integrated Solutions** on main menu or use the key command **ALT+I**.

3. Click **Resume Parsing**.

4. Find the Applicant to edit.

5. Click the Employee icon to the right of their name, the Contact/Summary will appear.

6. The user will first need to COPY the Original resume by clicking [icon] to the right of **Resume Copy**, click **OK** to overwrite any previous changes to the edit copy. The resume will be copied, click **OK**.

7. The user will then click [icon] to view and edit the resume from it's copied format.
   If the format is in Word, Word will open. If the format is in Adobe, Adobe will open. The user will want to review the application processes on how to edit the resume within the application.

8. Once the edits are done, click the SAVE icon in the application and exit.

9. The user will need to save the edits to the COATS Resume parser, by clicking [icon]. This will save the edited changes now as the Resume Copy.

10. The Resume Copy can be emailed or reviewed. If the user copies the resumes, the changes will be lost.