!Trak It Applicant™
Applicant Tracking Made Easy

Registration Form

If you would like to be notified of new features and releases of our software,
return this form to Trak-It Solutions, Inc.

Your Name: ____________________

Title: ____________________

Company: ____________________

Address: ____________________

____

Phone: ____________________

Type of Business: ____________________

Approximate Number of Applicants processed per month: ____________________

Where was !Trak-It Applicant purchased: ____________________

Software Purchased:

Your serial number: ____________________

- ☐ Small Business Edition
- ☐ Single User Edition
- ☐ Multi-User Network Option
- ☐ Applicant-on-the-Web Option

Return this form by mail to:

Trak-It Solutions, Inc.
1006-A Tamarack Court
Roseville, CA 95661

Or fax this form to:

Fax (916) 780-5796

!Trak-It Solutions' – HR Software Made Easy family of software includes:

!Trak-It HR	Human Resource Information System which provides complete personnel record keeping and reporting capability.
!Trak-It HR Attendance	Stand alone or as an integral part of HR, !Trak-It Attendance tracks, accumulates, and summarizes employee attendance saving your company many hours of manual labor.
!Trak-It HR Grievance	Stand alone or as an integral part of HR, !Trak-It Grievance tracks Complaints, Disputes, Discipline and Grievance actions by employee with an automated tickler system which keeps track of critical dates.
!Trak-It HR Link	As an option to HR !Trak-It Link, links the data between !Trak-It HR and your payroll system or other software applications such as Excel and Lotus using import and export options.
!Trak-It HR MC	As an option to !Trak-It HR, MC option that meets the needs for human resource organizations that maintain data for multiple companies or consolidate data from multiple locations.
!Trak-It Report	Provides instructions on modifying existing standard reports and letters, creating your own custom queries and reports, and printing labels.
!Trak-It Applicant	Tracks your company's applicants. This is an ideal solution for fast-growing companies with an active recruiting program.
!Trak-It Web	An option for Applicant that displays job openings and receives applicant resumes through your web site providing an online bridge between interested applicants and your company.
!Trak-It Extract(Scan)	An option for Applicant that speeds the entry of applicant data into your applicant system by extracting data from scanned resumes.

!Trak It Applicant™

Applicant Tracking Made Easy

Recruiting System

User's Manual

This Software and Manual are dedicated to:

Recruiters and Human Resource professionals everywhere.
The often over-worked and sometimes unappreciated individuals
who are the heart and conscience of every company.

!Trak-It Applicant is our contribution to
freeing you from much of the mundane record keeping
required by this profession.

!Trak It Solutions

1006-A Tamarack Court • Roseville, California 95661

(916) 780-8767 • Fax (916) 780-5796 • http://www.Trak-It.com

Manual written and produced by Sheri Lee
Cover design by Jorge Boas
Edited by Christine L. Waterman

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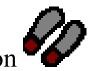
Quick Start with !Trak-It Applicant

Quick Load

If you can't wait to get started with !Trak-It Applicant, follow these four steps to begin tracking your applicant information:

1. Use the wizard to install your !Trak-It Applicant system in the appropriate location, usually under Programs on your C drive. If you have any problems, read Chapter 2, *Installing !Trak-It Applicant*.

2. Once installed, **double-click** on the !Trak-It Applicant application icon  (the foot prints) on your desktop. When !Trak-It Applicant prompts you for a User ID and a password on the first screen, enter **!TRAK-IT** for the User ID and **YES** for the password. Or if you are using the Demo version simply click on the Demo login button on the bottom right corner of the Login screen.

3. A reminder note screen will appear with pre-set reminders to follow up. Double click on a name to go to that applicant's main screen or click on the close button to go to the Applicant Assistant screen. Use the default Demo data to explore the !Trak-It Applicant system. To enter data for your company you must first switch to your Company's data by pulling down **File** from the Top Menu Bar and selecting the **Change Data To** option. From the submenu select **My Company's Data.** You are now ready to enter your Code Table, requisition, and applicant information. First pull down **Administrator** from the Top Menu Bar and select **Company Setup**. Enter the necessary data on the 3 screens, then click on OK. Next, click on the **Code Tables** icon on the Applicant Assistant screen and start entering your company's Job Codes, Job Titles, Position, Organization Levels, etc. Click on the **Requisitions** icon on the Applicant Assistant screen and enter your company's open requisitions. Click on the **Main** icon. The Main Applicant screen will be displayed in Edit mode so you can fill in the blanks with your applicant's information. If you are using the evaluation version see the next section for suggestions.

4. After you have entered several applicants, pull down **Reports** from the Top Menu Bar to produce any of the standard !Trak-It Applicant reports. Select **Applicant Information**. Select **Applicants by Name** from the submenu to produce an Applicant by Name report.

5. If you get stuck just call our friendly Technical support team and they will gladly and patiently walk you through the set up process.

Welcome to !Trak-It Applicant

Quick Walk-Through

The Demo data in !Trak-It Applicant contains the full system, allowing you to enter your own applicant data, use the Demo Data supplied with the system, or do both. The Demo Data is limited to 55 applicants. Included in the Demo Data is information for applicants similar to the data in this User Manual. There is enough room to enter additional applicants as well as the ability to change or delete the existing applicant information. The evaluation version also restricts dates to any year before 2000. The real !Trak-It Applicant system does not have these constraints, but it will not allow access after 30 days unless a license is purchased.

After starting !Trak-It Applicant, try the following:

1. If this is your first use of !Trak-It Applicant, the Demo Data is automatically available. If you have already entered an applicant under My Company's Data and you now want to use the Demo Data, pull down **File** to select the **Change Data To** option and then select **Demo Data** from the submenu.
2. To see the pre-loaded Demo Data, pull down **Screens** from the Top Menu Bar and select **Main Applicant** or click on the **Main** icon button on the **Applicant Assistant** screen. When prompted for a Name or App #, click on **OK.** (Mary Keys, applicant # 1, has data for most screens.) A screen will appear with the Demo Data sorted by Applicant name. Clicking on a value in the column will re-sort the list by that column.
3. To review an applicant's information, double-click on the applicant name or number to see the **Main Applicant** record for that applicant. The **Main Applicant** screen is actually a three-tab screen—General, Application, and Status. The General tab displays the applicant's personal information. The Application tab has information pertaining to the position the applicant desires and relevant information. The Status tab displays the applicant's current status and history. The applicant, Mary Keys, has information for each screen; the other Demo Data applicants may not have data for all screens. If they do not, you can add some information. You can also add and change Mary Key's data as you view each screen using the icon buttons at the top right.
4. With the **Main Applicant** screen displayed, pull down **Screens** from the Top Menu Bar and select another screen (or click on the corresponding icon button in the **Tool Bar)** to display other information about the applicant, such as education, former employers, references, etc. Click on the **Close** icon button (Big Red X) on the right end of the Tool Bar to close the current screen and return to the **Applicant Assistant** screen, or proceed to step 5 to update information.
5. To update information on a currently displayed **Main Applicant** screen, click on the **Edit** icon button in the **Tool Bar**. The items that can be edited will then appear highlighted. Point to an item and click to select it for editing. Now change it by retyping it or use any of the normal editing functions to make the changes. The second tab is the **Application** screen. The application information can be entered on this screen. The third tab is the **Status** screen. The **Status and Letter History** is maintained on this screen. You can also connect an applicant to a requisition from this screen. When the changes are complete, click on the **Save** icon button in the **Tool Bar** which will save your updates and return the screen to view mode. Click in the **Close** icon button to return to the **Top Menu Bar** and **Applicant Assistant** screen or select another screen to access more information about this applicant.
6. Select **Requisitions** under **Screens** on the Top Menu Bar or click on the **Requisitions** icon button on the **Applicant Assistant** screen. When prompted for a Requisition ID, click on the OK

button. A browse list of all requisitions will be displayed. Select one of interest, then click on the OK button, and the information for that requisition will be displayed. Select the **Requirements** tab of the Requisitions screen to see the current requirements for the requisition, add to or change the requirements. From the Requirements screen you can also **Match Applicants** to the requisition. Click on the Close icon button to return to the Top Menu Bar.

7. To add an applicant, select **Add** under **Commands** on the Top Menu Bar or click on the **Add** icon button on the **Tool Bar** if it’s available. After entering the new applicant's name, a check for duplicates is made automatically. If duplicates are not found, the **Main Applicant** screen appears for you to enter additional applicant data. Use the Tab key or left or right arrow keys to navigate through the data fields. You can also use the arrow to select a specific field to edit. After entering the applicant data, you can click on the **Add Req** button on the **Status** screen to add a requisition to the applicant. When finished, click on the **Save** icon button. To enter other types of data for this applicant, make additional selections from **Screens** on the Top Menu Bar or click on one of the **Screen** icon buttons on the left side of the **Tool Bar**.
8. To generate a report, click on the **Reports** button to make a selection from one of the categories of reports. Then double-click on a report format, followed by choosing which applicants or requisitions you wish to select for the report. When the report appears, you can scroll forward and backwards through it as well as make changes before printing, saving, or canceling it.
9. To leave !Trak-It Applicant, select **Exit** under **File** on the Top Menu Bar or click on the **Exit** icon button (Big Red X) on the **Applicant Assistant** screen.

Following these steps should help you begin using !Trak-It Applicant. Of course, there is much more to !Trak-It Applicant, so be daring and try a few things on your own. You're not going to hurt anything and you could learn a lot. If you get stuck or have questions, first peek through this User's Manual to see if it has the answer. But don't hesitate to give us a call if you want to talk to a real person. We will be happy to give you a helping hand.

Have fun playing with !Trak-It Applicant. We hope it will stimulate your imagination and show you how much time you will save by having it as part of your Human Resource Department's software. We look forward to having you join our group of happy customers.

The next section is an overview of the manual to help you understand its structure.

Using the !Trak-It Applicant Manual

This manual is written for human resource professionals. You do not need to be a computer expert to manage your applicant information with !Trak-It Applicant.

!Trak-It Applicant Overview

Chapter 1	Introduction – overview of !Trak-It Applicant
Chapter 2	Installing !Trak-It Applicant – procedures to install !Trak-It Applicant, hardware and memory requirements
Chapter 3	Getting Started – environmental options and password setup procedures to limit access to your applicant data.
Chapter 4	Understanding Code Tables – code table setup for consistent data entry and validation checking
Chapter 5	Top Menu Bar and the Tool Bar – descriptions of the File, Edit, and Commands menu selections and the Tool Bar
Chapter 6	Requisitions - how to enter information on open positions in your company and search your database for qualified applicants
Chapter 7	Screens and Applicant Data – how to enter applicant information and make status changes – the steps to add, change, and delete applicant information
Chapter 8	Contacts - entering easily accessible records of your important contacts
Chapter 9	Selecting and Printing Reports – steps to create standard reports
Chapter 10	Utilities and Administrator – handling special situations, description of menu selections used for setting up !Trak-It Applicant and protecting against unauthorized access to applicant data
Chapter 11	!Trak-It Scan Option – using the extra cost option to extract applicant information from scanned resumes and transferring the data to your databases
Chapter 12	Web Interface Option – an extra cost option that dynamically in real time, manages your job postings on your web site and automatically gathers resumes and / or job applications from job applicants.

Appendices

Appendix A	Screen Data Elements – detailed description of each screen
Appendix B	Data Dictionary – detailed description of each data table
Appendix C	Exporting and Importing Data – notes on moving data in and out of !Trak-It Applicant
Appendix D	System Configuration – configuring your system
Appendix E	Multi-User Network Option – installation and details about the network version
Appendix F	Functions, Expressions, and Record Filters – for customized reports
Appendix G	Trouble Shooting – resolution input for certain situations
Appendix H	Standard Reports List – listing of standard reports
Appendix I	Small Business Edition vs. Standard Edition Features
Appendix J	Web Connections

!Trak-It Applicant Keyboard Shortcut List for Windows

The following Windows environment keyboard shortcuts are available in !Trak-It Applicant to provide a way to choose menu items from the keyboard instead of using the mouse.

Shortcut	File, Edit, or Command Menu Item
Ctrl+A	Add a record
Ctrl+B	Browse the current database
Ctrl+C	Copy selected characters
Ctrl+D	Delete a record
Ctrl+E	Edit a record
Ctrl+F	Find a record
Ctrl+L	Cancel the current changes
Ctrl+PgDn	Next record
Ctrl+PgUp	Previous record
Ctrl+R	Redo the previous action
Ctrl+S	Save the current record as edited
Ctrl+U	Undo the previous action
Ctrl+V	Paste clipboard at insertion point
Ctrl+X	Cut the selected characters
Ctrl+F4	Close the top window

Shortcut	Screen Menu Item
Alt+M	Main Applicant
Alt+O	Applicant Notes
Alt+X	Resume
Alt+D	Education
Alt+Y	Former Employers
Alt+B	References
Alt+K	Skills
Alt+J	Tests
Alt+T	Training
Alt+I	Invitations
Alt+G	Routing
Alt+Q	Requisitions
Alt+W	Requisition Notes
Alt+L	Contacts
Alt+Z	Code Tables

Note that the keyboard shortcuts for the Screens menu items use Alt plus a letter whereas the File, Edit, and Command menu items use Ctrl plus a letter.

Chapter 1
Introduction to !Trak-It Applicant

!Trak-It Applicant is an extremely easy-to-learn and easy-to-use computerized Applicant Tracking System. You can send letters to qualified applicants, produce Affirmative Action reports, analyze the costs of hiring and produce statistics of your recruiting efforts. !Trak-It Applicant is the ideal solution for fast-growing companies with an active recruiting program. Some of the capabilities include:

- Search for applicant by skills, former employer, education, or any condition
- Complete job requisition system with Cost of Hire analysis
- Built-in reminder system for follow-ups, Invitations and Routings
- Built-in email via your email system
- Built-in web interface to HireHelper.com to do Background reference checks, schedule Drug tests or on-line Assessment tests
- Built-in web interface to post job openings on over 150 job boards via WhoToChoose.com
- Resume scanning – automatically extracts data from resumes (extra cost Extract option)
- Automatic extraction of Monster.com Resumes (via Extract option)
- Interface to your web site for dynamic job posting (via Web option)
- Automated Job board for your web site (via Web option)
- Web Applicant self-service for your web site (via Web option)
- On-line status and letter history for each applicant
- Built-in logging of each applicant’s status changes or letters sent
- Applicant archive/retrieve functions
- Interviewer and invitation scheduling
- Over 100 Standard reports, most can be easily customized
- Affirmative Action Analysis (EEO) and Adverse Impact Analysis
- Analysis of applicant sources, Applicant profile reports
- Custom User-defined reports, labels envelops, letters and email letters
- Batch letter generation (paper or email)
- Report scheduling
- Easy transfer of hired applicant to !Trak-It HR employee system
- Export to word processing, spreadsheet and graphics packages

Multi-User Network and Remote Use

If you wish to use !Trak-It Applicant from multiple workstations, you must purchase the multi-user license of !Trak-It Applicant to operate on your LAN network.

For remote access via web or modem use Citrix or Windows 2000 terminal server. Contact !Trak-It Solutions for details or for access to our web based hosted service of Applicant.

Optional Interfaces

!Trak-It Extract (Scan) expedites the entering of applicant information by scanning and extracting from the resume names, addresses, phone numbers email addresses, skills, former employers and schools attended. This eliminates hours of data entry by automatically loading important information from scanned applicant resumes to the !Trak-It Applicant databases. See Chapter 11 for details on this extra cost option.

!Trak-It Applicant Web Interface allows you to dynamically display all your open job positions on your company web site and allows interested applicants to automatically submit resumes or fill out a customizable online job application for your company. See Chapter 12 for details on this extra cost option.

Small Business Edition

The Small Business Edition of Applicant is the standard edition with certain features turned off via a software key. This means that if you wish to upgrade to the Standard Edition, you may do so at any time by contacting !Trak-It Solutions and purchasing an upgrade license. See Appendix H for chart of differences. These items are indicated in this manual via the asterisk (*). The Small Business Edition allows for an unlimited number of applicants to be stored as well as providing the web connections to do background checking and job posting.

Comments?

Let us know if you would like a new feature added to !Trak-It Applicant or if you have a question. Hearing from you is the only way we can make !Trak-It Applicant an even better recruiting system.

Chapter 2
Installing !Trak-It Applicant

The procedures for installing !Trak-It Applicant in a Windows environment assume that you have some familiarity with Windows. If any of these concepts are unfamiliar to you, please refer to your computer user's manual. After you install !Trak-It Applicant, you will need to set up your Company, Code Tables, user ID's, and user access privileges.

Demo Version

A Demo version of !Trak-It Applicant is a real working version of the software with some limitations: access is limited to the included Test company data; a maximum of 55 applicants is allowed, and each time you log in the Demo data is refreshed. Demo versions are single user installations. Once installed as a Demo version, !Trak-It Applicant can be easily upgraded to a live system by entering a serial number and configuration code.

Single-User Installations

In a single-user installation, both the !Trak-It Applicant program and your data are installed on the same computer's hard disk. Access is limited to one user's workstation. However data backup can be re-directed to another hard disk such as your company's server, removable media. Choose 'Single User' to install this configuration.

Multi-User Installations

In a multi-user installation, the !Trak-It Applicant program is installed on each user's workstation and the data is installed on your company's server. An unlimited number of users can simultaneously access the data on the server via your company's LAN. Choose 'Install New User' on the wizard screen for each user's workstation. Choose 'Install New Server' to install the server files.

(Note: To access Applicant via the web or from a remote location such as your home, your server needs to be equipped with certain features available from other companies that support such services. Contact !Trak-It Technical Support for information.)

Updates

An "Update" is a new version of !Trak-It Applicant. The latest Updates are always available via our web site (www.trak-it.com). Major Updates are released approximately once a year. Users who subscribe to our annual !Trak-It Support and Update Service automatically receive notice of these updates as soon as they are available via email. They are available from our web site. For Multi-user installations, all users must be updated to the same version of Applicant to avoid damaging the data. All update data changes are automatically accomplished when the new update is run for the first time. Choose 'Update Client' on the wizard screen to update a user's workstation. Choose 'Update Server' to update the server files.

Note: When updating you must choose the folder where your existing client (or server data) resides.

Installation Procedures From our Web Site

After downloading a copy of !Trak-It Applicant from our web site (www.trak-it.com), double click on the downloaded *ATsetup.exe* to start the installer wizard described below. To access this web download you will be given a User ID and Password in the email notification along with a code word to initiate update installation.

Installation Procedures From our CD

Insert the CD into your CD drive. From the splash screen, choose "Install !Trak-It Applicant" to start the installer wizard. You may also wish to install a "PDF Version" of the Applicant manual onto your local hard disk as well for instant access to the manual.

Installer Wizard

The installer wizard will lead you through a series of steps to properly install !Trak-It Applicant onto your computer. Follow the directions on the screen. You can use the default directory or select your own destination directory.

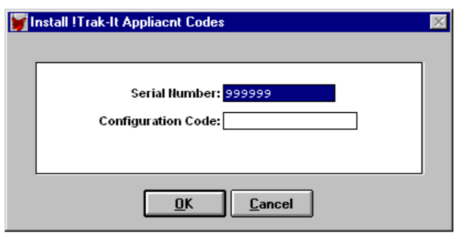
Running !Trak-It Applicant

Follow these steps to run !Trak-It Applicant for the first time.

1. Double-click on the !Trak-It Applicant icon on your Desktop or the AT.exe item inside the !Trak-it Applicant folder on your disk.

2. The **Install !Trak-It Codes** screen appears.

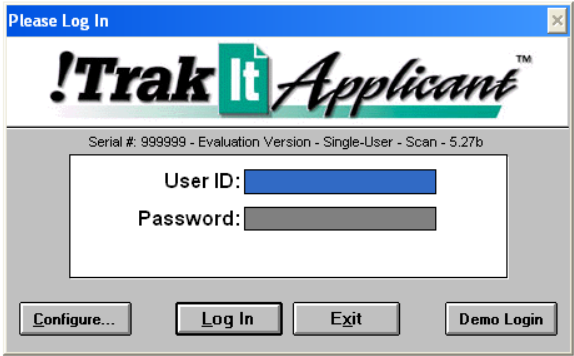
   

   a. If you are installing a **Demo** version of !Trak-It Applicant, simply click on the **OK** button.

   b. If you have a serial number and configuration code, enter them in the Install screen and then click on the OK button. Your Serial Number and Configuration Code can be found on the Installation Instruction sheet enclosed with the system disk or provided by your reseller.

3. Instruction screens will display version information and the default User ID and Password to run !Trak-It Applicant.

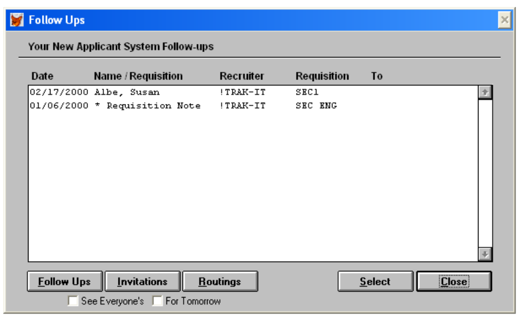
4. The following screen appears for you to log in.



5. Enter the User ID: **!TRAK-IT** and the Password: **YES** . Click on the **Log In** button. The pre-set User ID has Administrator privileges so you can add other users later.

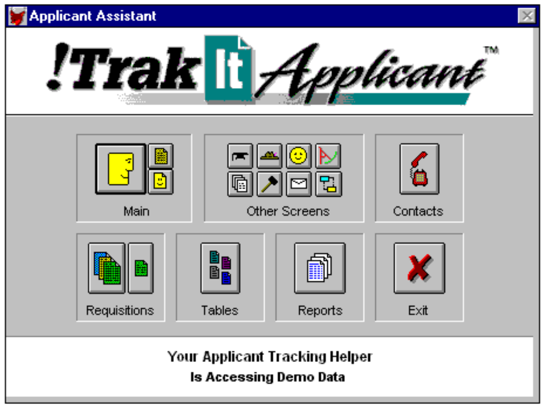
   If you have installed a Demo version, there is a **Configure…** button on the lower left side of the Log In screen. Clicking on this button allows you to choose a configuration to evaluate. Configurations include: Applicant with Scan, Applicant only and Small Business Edition. Choose the configuration you wish to test, click on the OK button and then proceed to log in via the above screen.

6. The Notes to Follow Up screen appears if you did not choose Small Business Edition via the Configure… button.



   This screen acts as a reminder of follow-ups, invitations and routing reminders that you have scheduled for yourself for today. See chapter 5 for more details about this screen and how to use it. Click on the Close button to exit the screen without seeing any of the notes.

7. The Applicant Assistant screen will appear. You are ready to begin exploring !Trak-It Applicant.



Notice that the bottom line of the Applicant Assistant screen tells you whether you are accessing Demo Data, Your Company's Data, or Archive Data.

Chapter 3
Getting Started

Overview of Setting Up !Trak-It Applicant

!Trak-It Applicant is an extremely helpful applicant and requisition tracking system. To get the best use of the system, be sure to do things in the correct order. First, you must set up your Company via the Company Setup screen on the Administration menu as instructed in this chapter. Then you must set up your Code Tables following the instructions in Chapter 4. Once the Code Tables are established, you should enter your company's open requisitions or positions for which you are seeking applicants. Instructions on entering requisitions are in Chapter 6. After entering your requisitions, refer to Chapter 7 to learn how to enter applicant information and Chapter 11 to learn how to automatically extract necessary information from scanned resumes.

You are then ready to start matching your open requisitions with the applicants' information loaded in your databases. You can connect applicants to open requisitions from the Status tab of the Main Applicant screen or requisitions to applicants via the Requirements tab of the Requisitions screen.

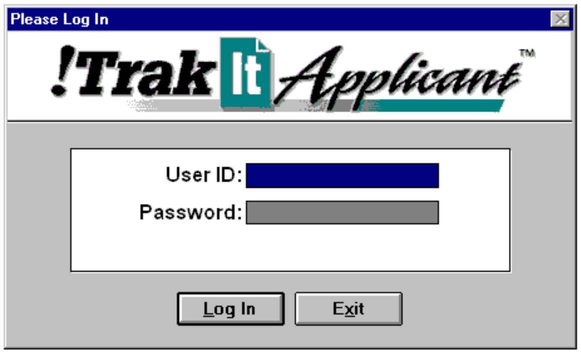
You create your own library of letters and / or emails of acknowledgement, interview schedule, offer, and rejection. These can be automatically generated on the specified date simply by entering the request for a letter to be sent to an applicant on the Status tab of the Main Applicant screen. A default letter or email can be specified to be sent to each applicant as part of their being entered into the system. Letters and emails can be batch generated such as when a requisition has been filled and you would like to notify all applicants considered for that requisition that the position has been filled.

Log In Screen

Double-click on the !Trak-It Applicant icon to run !Trak-It Applicant. Each time you use !Trak-It Applicant you will see the following screen and will be prompted to enter your User ID and Password. !Trak-It Applicant is shipped with the following:

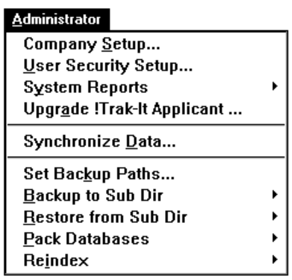
User ID:	**!TRAK-IT**
Password:	**YES**

Once you have entered the system using the above defaults, you can establish your own ID's and Passwords via the User Security Setup screen under the Administrator menu. It is recommended that you set up your passwords to restrict unauthorized personnel from accessing your sensitive data as described later in this chapter under the section, Setting Up Other Users.



Company Setup

You must have administrator privileges to access the following Company Setup screen. The default ID and Password have access to this screen.

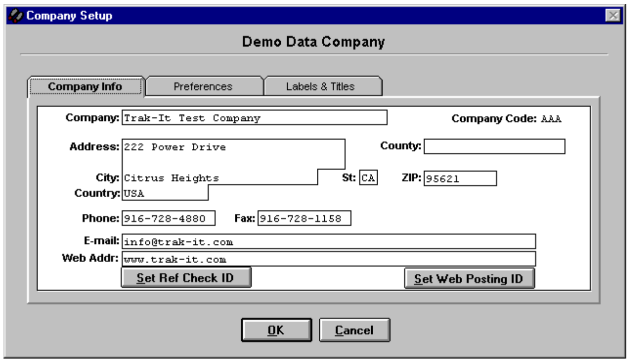


Click on Company Setup under Administrator on the Top Menu Bar. The Company Setup screen is used to define your company name and address and enable or disable field validation. It also allows you to set up names for user-defined data items.

You will notice the screen has tabs for additional screens. All 3 screens are for setting up your company information. The Company Setup screens are automatically in edit mode. To enter or change the information on the screen, select and type over what is already there. You can erase unwanted characters with the Backspace or the Delete keys. You can also use your mouse to select unwanted characters and then press the Backspace or Delete key to erase them, or just enter any characters to replace the selected text. Press Tab to move to the next field or press Shift and Tab simultaneously to move to the previous field.

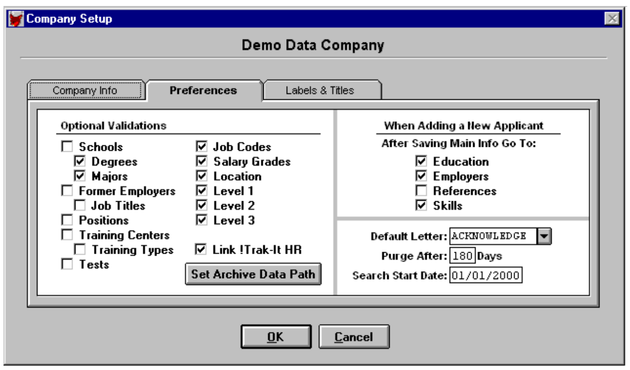
Company Info - Tab

Enter the name and address of your company, as you would like it to appear on report headings. The address is used for reports. Enter the remaining data on this screen and proceed to the Preferences screen by simply clicking on the tab labeled Preferences.



Preferences - Tab

The Preferences screen allows you to customize how !Trak-It Applicant will work for you by specifying preferences and defaults.



Optional Validations

When adding new applicants, !Trak-It Applicant automatically checks for duplicates. If you also want !Trak-It Applicant to validate an applicant's former employers, school names, former job titles, etc. against your code tables, click inside the appropriate check box to enable that validation. Instructions for setting up Code Tables are in the next chapter.

Schools

If you wish to set up a Code Table to validate school names on the Education screen for all applicants, click in the check box next to this option. If you do not choose this option, the same school could be entered inconsistently and affect your searches and reports.

Degrees

If you wish to set up a Code Table to validate an applicant's degrees on the Education screen and use degrees in conjunction with requisition requirements, click in the check box next to this option.

Majors

If you wish to set up a Code Table to validate an applicant's majors on the Education screen and use majors in conjunction with requisition requirements, click in the check box next to this option.

Former Employers

If you wish to set up a Code Table to validate former employer names on the Former Employers screen for all applicants, click in the check box next to this option. This ensures that a company's name is entered consistently, making your reports look nicer and your searches more exacting.

Job Titles

If you wish to set up a Code Table to validate an applicant's past job titles, click in the check box next to this option. If you do not choose this option, you might have several variations of the same job title.

Positions

If you wish to set up a Code Table to validate an applicant's desired position on the Application tab of the Main Applicant screen or the position entered on the Former Employer screen, click in the check box next to this option. If you do not choose this option, you might have several variations of the same position.

Training Centers*

If you wish to set up a Code Table to validate an applicant's training centers and use training centers in conjunction with requisition requirements, click in the check box next to this option.

Training Types*

If you wish to set up a Code Table to validate an applicant's training types and use training types in conjunction with requisition requirements, click in the check box next to this option.

Tests*

If you wish to set up a Code Table to validate an applicant's tests (i.e., Scholastic Aptitude Test) and use test codes in conjunction with requisition requirements, click in the check box next to this option.

Job Codes

If your company has formal job codes which identify a job, click in the check box next to this option. These codes are used on the Requisition screen.

Salary Grades

If your company has formal salary grades which define a job, click in the check box next to this option. These codes are used on the Requisition screen.

Location

If your company has job locations to validate, click in the check box next to this option. Locations can be imported from !Trak-It HR.

Organization Levels

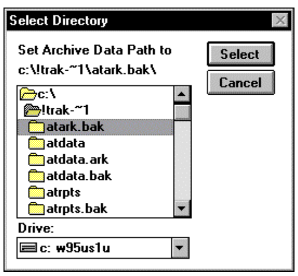
If your company has formal organization levels to validate, click in the appropriate check boxes next to these options. Organization levels can be imported from !Trak-It HR.

Link to HR

If you have !Trak-It HR installed, click in the check box next to Link !Trak-It HR to establish the connection between Applicant and HR. A Select Directory screen will appear for you to select the directory containing your !Trak-It HR system. Link to HR provides drop-down windows on the Requisition screen to select names for the supervisor and manager and on the Routing and Invitation screens for the names of the employees, their phone numbers, and locations. This link also allows for automatic transfer of data when an applicant is hired as an employee.

Set Archive Data Path

Click on the Set Archive Data Path button to set the path to your archive databases. The Select Directory screen will appear.



Select the subdirectory or folder to which you want to archive your files by highlighting the appropriate item and clicking on the Select button.

Screen Sequencing for Adding New Applicants

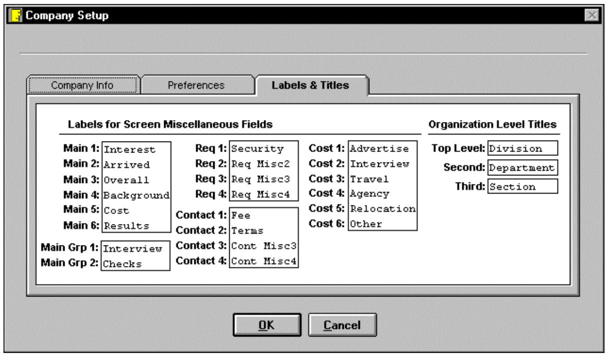
When adding a new applicant you have the option of specifying which screens will automatically be displayed after saving the new applicant's Main screen. Click in the check box next to the screens you want to automatically be displayed. Your options include screens for Education, Employers, References, and Skills. Any one or all of them may be selected. The choice is yours.

Other Defaults

Once you have customized your letters, come back to set your default letter to be sent to applicants as they are entered into the system. You can also set the Purge Date a specified number of days after the Applied Date. This date is useful for Archiving or Deleting Applicants, since after awhile their information will no longer be of active interest. The Search Start Date is useful for reports and queries that ask for date ranges for applied dates. Being able to set it is just another nice convenience of !Trak-It Applicant.

Labels and Titles - Tab

Click on the last tab on the Company Setup screen to display the Labels and Titles screen.



Labels for Screen Miscellaneous Fields

The **Main Applicant** screen has six user-defined data items: Main 1 through Main 6 are defined in the Labels and Titles screen as displayed above. To change the names, type over the names currently displayed on the Setup screen. These data items will be displayed on the right side of the Main Applicant Application tab screen. The title for Main 1 through Main 3 is defined in the Main Grp 1 field and the title for Main 4 through Main 6 is defined in the Main Grp 2 field. These names are used for screen displays and pre-programmed reports only.

The **Requisition** screen has four user-defined data items: Req 1 through Req 4 are defined in the Labels and Titles screen as displayed above. To change the names, type over the names currently displayed on the Setup screen. These data items will be displayed on the bottom part of the Requisition tab of the Requisition screen. They are used for screen displays and pre-programmed reports only.

The **Costs** screen of the Requisition also has six user-defined data items: Cost 1 through Cost 6 are defined in the Labels and Titles screen as displayed above. To change the names, type over the names currently displayed on the Setup screen. These data items will be displayed on the Costs screen. They are used for screen displays and pre-programmed reports only.

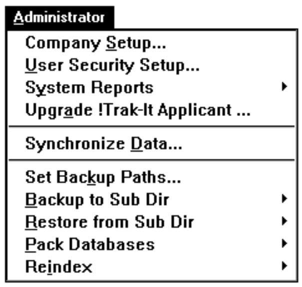
The **Contacts** screen has four user-defined data items: Cont 1 through Cont 4 are defined in the Labels and Titles screen as displayed above. To change the names, type over the names currently displayed on the Setup screen. These data items will be displayed on the middle right side of the Contacts screen. They are used for screen displays and pre-programmed reports only.

Organization Level Titles

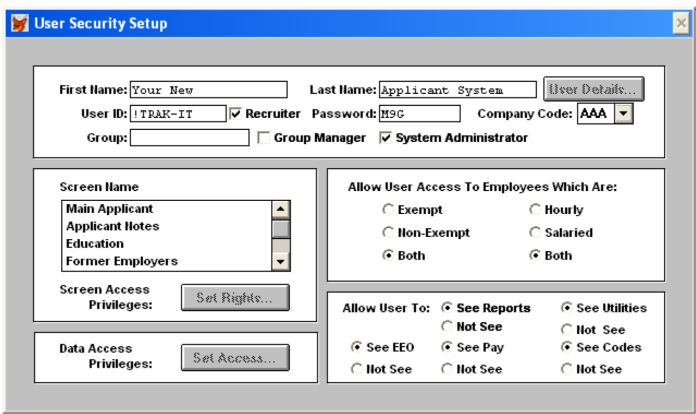
!Trak-It Applicant allows for three user-defined organizational levels: *Top, Second, and Third*. Division, Department, and Section are the default names. To change the names, type over the name currently displayed on the Setup screen. If you have only one level, use Level 1. If you have two levels, use Level 1 and Level 2. These organizational levels are used in various reports.

Setting Up Other Users

You must be the System Administrator to establish passwords and user ID's. The System Administrator sets up all users on the system and makes decisions regarding data access and restrictions. If the user does not have Administrator privileges, the user will not have access to the items under the Administrator menu. Pull down the Administrator menu and select User Security Setup.



When you select User Security Setup, the following screen is displayed for you to add users or modify the existing user's privileges. The Tool Bar is available for you to add, edit or delete users. Click on the Add icon button to add a user to the system. Click on the Edit icon button to edit the currently displayed user.



The following data items must be entered to establish an employee as a !Trak-It Applicant user:

1. Enter the first name of the employee to be given system access privileges.
2. Enter the employee's last name.
3. Enter the User's ID. Usually the employee's initials are entered for user ID.
4. Check the Recruiter check box if this person is to appear on the various recruiter pull down lists.
5. Assign and enter the employee's Password. For best security the Password should be a number-character combination and not the person's name or other easily discerned word or number. The

Password can be changed by the employee later. Once the screen is saved, !Trak-It Applicant changes the Password field display to other characters for confidentiality.

6. Set screen access privileges as described briefly in the Setting User Access Privileges section.

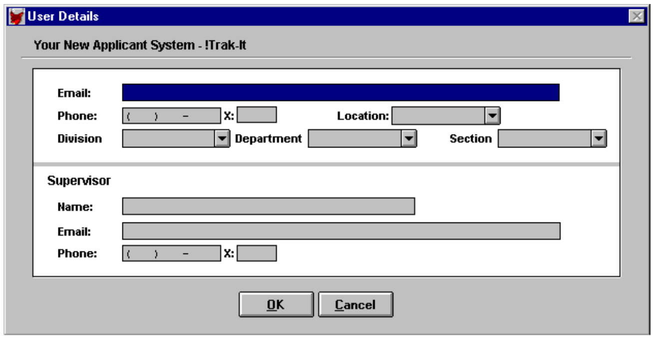
You can identify a specific group of employees by entering a group name in the Group field and assigning someone in that group as *Group Manager* by clicking in the check box next to Group Manager. A Group Manager should be the person who has the authority to establish privileges on the system for users in his group.

Click in the check box next to ***Company Administrator*** if the user is to have Administrator privileges. If the user does not have Administrator privileges, the user will not have access to the items under the Administrator menu. Usually, only the Company Administrator should have Administrator privileges to control the privileges and restrictions of the other users.

In the ***Allow User Access to Applicants Which Are*** section, you can specify the user's access or restriction to applicant records according to their Exempt status and whether they are Hourly or Salaried by clicking on the appropriate radio buttons.

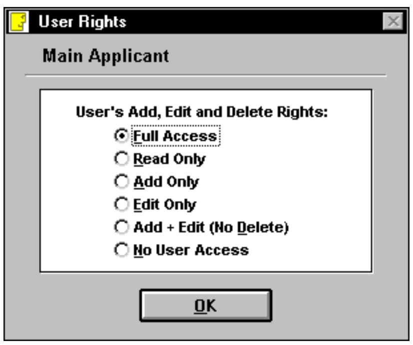
In the ***Allow User To*** section, click on the appropriate radio button to allow or restrict access to EEO or applicant pay information. You can restrict the user from accessing the Code Tables by clicking on the appropriate Not radio button. You can also restrict access to several of the Utilities menu selections by clicking on the appropriate Not radio button.

The following screen is accessed via the User Details button and stores additional data items for each !Trak-It Applicant User such as email address etc. Various screens use these values, for instance when you assign a recruiter to a requisition their phone number and email address are assigned based on the data entered on this screen.



Setting User Access Privileges

From the user's User Security Setup screen, select the Screen Name for which you want to restrict or allow privileges. Then click on the Set Rights... button. The following screen will be displayed for you to specify the user's access privileges.



Click on the appropriate radio button to designate any access restrictions or privileges for the selected screen. The options are Full Access, Read Only, Add Only, Edit Only, Add & Edit (No Delete), and No User Access. See the chapter, *Utilities and Administrator,* for further details. Click on the OK button when done.

Click on the Add button on the Tool Bar to add another user. The new user will inherit or be given the same privileges as the user displayed at the time of the add button was clicked. Click on the Close button to return to the Top Menu Bar.

Notes:

Chapter 4
Understanding Code Tables

Code Tables are
lists of codes that you set up within !Trak-It Applicant to simplify your data entry. They have three very useful purposes:

1. **Code Tables save keyboarding.** Code Table values are available on the data entry screens through the convenience of a drop-down menu. For example, when you enter data for hundreds of applicants, it is much faster to select UCLA from a drop-down menu than type "University of California Los Angeles."
2. **Code Tables ensure accurate reporting.** Let's assume that you want a report that groups applicants together by a skill. Without having the discipline of a uniform coding scheme, you might spell the same skill differently for different applicants. For example, you could enter any or all of the following: COBOL, COBOL PROG., CBL PRG, PGM-COBOL. If you did this, the computer would think that each spelling was a different skill and your skill report would reflect this inconsistency.
3. **Code Tables eliminate incorrect entries**. Code Tables validate your input and help ensure that you enter important information consistently, so you can sort and retrieve the data accurately. In fact, you will not be able to get out of a data entry screen until you have entered all the codes correctly. Thus, you are ensured of entering accurate data.

Code Tables in !Trak-It Applicant

You must enter your codes for the Code Tables prior to entering any applicant data. You may add, change, or delete code values at any time. Most tables have been predefined with recommended codes.

Code Table Descriptions

Each Code Table available in !Trak-It Applicant is designed to assist you in data accuracy and consistency. The following description of each table is provided to help you get an overview of the different areas that need to be set up prior to entering applicant data.

Degrees	The Degrees Code Table contains all the degrees you may want to track for all applicants and use in conjunction with requisition requirements. Validation can be enabled or disabled on the Preferences tab of the Company Setup screen under the Administrator menu.

EEO Classes

EEO Classes Code Table is set up with the following nine standard government EEO class codes.

Officials and	Craft Workers -
Professionals	Operatives - Semi-
Technicians	Laborers - Unskilled
Sales Workers	Service Workers
Office Clerical	

Former Employers

The Former Employers Code Table stores the company codes for former companies applicants may have worked for which may be used as a requirement on a requisition. Validation can be enabled or disabled on the Preferences tab of the Company Setup screen under the Administrator menu.

Industry Codes

The Industry Codes Table provides a way to categorize companies into groups. For example, an electronics category or SIC # would apply to various companies, such as Intel, AMD, Apple, etc., so searching for a former employer in electronics is possible instead of searching for several companies by name.

Job Codes

The Job Codes Table defines the positions within your company. Each Job Code record also contains the job title, salary grade, job group, EEO class, and whether the position is exempt. Job Code validation is optional, although !Trak-It Applicant is shipped with validation enabled so you can see how it functions. Validation can be enabled or disabled on the Company Setup screen under the Administrator menu, which is discussed in the *Utilities and Administrator* chapter.

Job Groups

The Job Groups Codes are used to identify the EEO Job Groups.

Job Titles

The Job Titles Code Table contains the possible job titles for company positions. Validation can be enabled or disabled on the Preferences tab of the Company Setup screen under the Administrator menu.

Job Types

The Job Types Code Table is used to define the job type. !Trak-It Applicant is shipped with the following Job Type Codes predefined.

Code	**Description**
(blank)	None Specified
RFT	Regular Full Time
RPT	Regular Part Time

Locations

The Location Codes are used to define abbreviations indicating where the position is available. For example: NYC office, Denver

	office. Validation can be enabled or disabled on the Preferences tab of the Company Setup screen under the Administrator menu.
Majors	The Majors Code Table contains all the majors you may want to track for all applicants and use in conjunction with requisition requirements and the Education screen. Validation can be enabled or disabled on the Preferences tab of the Company Setup screen under the Administrator menu.
Organization Level 1	The Organization Level 1 Codes are used to identify the top level in your company. The default used on screens and reports is Division. The title for this level is set on the Company Setup screen under the Administrator menu in the Top Menu Bar.
Organization Level 2	The Organization Level 2 Codes are used to identify the 2nd level in your company. The default used on screens and reports is Department. The title for this level is set on the Company Setup screen under the Administrator menu in the Top Menu Bar.
Organization Level 3	The Organization Level 3 Codes are used to identify the 3rd level in your company. The default used on screens and reports is Section. The title for this level is set on the Company Setup screen under the Administrator menu in the Top Menu Bar.
Positions	The Positions Code Table contains the codes for positions an applicant may desire. Validation can be enabled or disabled on the Preferences tab of the Company Setup screen under the Administrator menu.
Referral Sources*	The Referral Sources Code Table contains codes for all possible referral sources your company may want to track.
Referral Types*	The Referral Types Code Table contains the codes to be used in tracking whether the applicant was referred by a friend, former supervisor or employer, etc.
Reject Reasons	The Reject Reasons Code Table contains codes for reasons pertaining to applicant or employer rejection for specific requisitions.
Requisition Category	The Requisition Category Code Table contains the categories for which a requisition can be classified. This table is used in conjunction with publishing job openings on your company's web site which is an interface available as an extra cost option.

Salary Grades	The Salary Grades Code Table defines the salary grades used by your company. Each salary grade record includes a description, minimum, maximum, and midpoint pay, and the pay period. Salary Grade Table validation is optional, although !Trak-It Applicant is shipped with validation enabled so you can see how it functions. Validation can be enabled or disabled through the Company Setup screen under the Administrator menu.
School Groups	The School Groups Code Table provides a way to categorize schools in groups. For example, all junior or community colleges could be identified by a school group code of JC. Instead of doing a search for all community colleges, you can search by the group code representing community colleges. These codes are used in conjunction with applicant education records and requisition requirements.
Schools	The Schools Code Table contains abbreviations for schools attended by an applicant and used as a requirement for a specific requisition. Validation can be enabled or disabled on the Preferences tab of the Company Setup screen under the Administrator menu.
Skills	The Skills Codes are used to define abbreviations for applicant skills. To more specifically assign the skill level of an applicant, you can define several skills, one for each level of experience. This table can also be used in conjunction with establishing requirements for requisitions.
States	The States Code Table contains the standard state abbreviations.
Status Codes	The Status Code Table contains the codes used to identify the current status of an applicant's application.
Synonyms	The Synonyms Code Tables are used for identifying alternate names for various schools, job titles, positions, etc., used in conjunction with !Trak-It Scan only.
Test Codes*	The Test Codes Table contains all the test codes you may want to track for applicants and use in conjunction with requisition requirements. Validation can be enabled or disabled on the Preferences tab of the Company Setup screen under the Administrator menu.

Training Center Groups*	The Training Center Groups Code Table is used to categorize training centers into groups. For example, all computer training centers can be categorized by assigning the same Training Center Group code to each center. Instead of doing a search for several training centers, you can search by the group code representing the specific group of training centers. These codes are used in conjunction with applicant training records and requisition requirements.
Training Centers*	The Training Centers Code Table contains all the training centers you may want to track for applicants and use in conjunction with requisition requirements. Validation can be enabled or disabled on the Preferences tab of the Company Setup screen under the Administrator menu.
Training Codes*	The Training Codes Table contains all the training codes you may want to track for applicants and use in conjunction with requisition requirements. Validation is available.

Sample Codes for Code Tables

The following table provides a sample for each Code Table and indicates the maximum code length allowed for each code. There are also several examples of codes in the Demo Data. All Code Tables allow a description of up to 25 characters for each code value. There are instructions later in this chapter on printing Code Tables.

Code Table	*Sample Code*	*Sample Description*	*Code Length*
Degrees	BA	Bachelor of Arts	10
EEO Classes	2	Professionals	6
Former Employers	FMC	FMC Corporation	40
Industry Codes	ELEC	Electronics	6
Job Codes	OPER1	Machine Operator 1	12
Job Groups	ENGR	Engineers	6
Job Titles	SR ENGR	Senior Engineer	40
Job Types	RFT	Regular Full Time	3
Locations	NYC	New York Sales Office	12
Majors	ENGINEERING	Engineering	40
Organization Level 1	CONSUM	Division - Consumer	12
Organization Level 2	ACCNTNG	Department - Accounting	12
Organization Level 3	ACCTRECV	Section - Accts Receivable	12
Positions	VP	Vice President	40
Referral Sources*	AGENCY	Employment Agency	12
Referral Types*	S	Former Supervisor	1
Reject Reasons	UNQ-EXP	Unqualified - Experience	10
Requisition Category	SECRETARIAL	Secretarial	25
Salary Grades	EW12	Exempt $17.4 - 24.4k /Yr.	6
School Groups	JC	Junior Colleges	8
Schools	UCLA	Univ of CA - Los Angeles	40
Skills	SALES	Sales Experience	15
States	AK	Alaska	3
Status Codes	OFFER	Offered the Position	10
Synonyms	UCLA	U.C.L.A.|Univ. of CA - LA|...	40
Test Codes*	SAT	Scholastic Aptitude Test	12
Training Center Groups*	COMPUTER	Computer Training Centers	8
Training Centers*	HEALD	Heald Training Center	40
Training Codes*	CPA	Certified Public Accountant	10

Setting Up Your Code Tables

First, define the code values you want to use for each Code Table. Get out a pencil and paper and create codes that are easy to remember and easy to find on an alphabetized list. Codes can be added, deleted or changed at any time, so your first list does not have to be perfect. Be sure to take advantage of the suggested codes that are predefined in the Code Tables. Most of them are suitable for all companies.

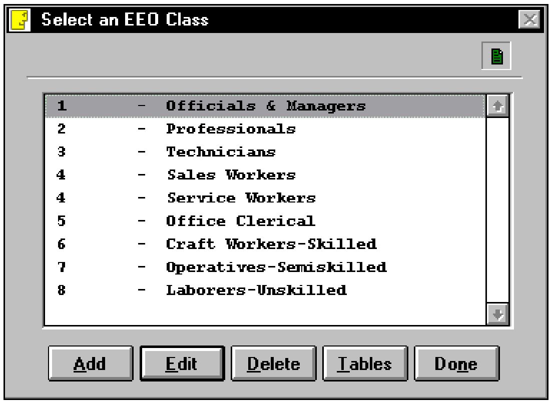
!Trak-It Applicant is shipped with a blank code for each Code Table except EEO Classes. If you do not want to allow a blank as a valid code for a certain table, you must delete the blank code in that code table. The blank code has the description, "None Specified."

Note: When you are entering data and do not have the particular information available, a blank code will allow you to exit the screen and not enter a code in a validated field. If, however, you do not have a blank code in the table for a validated field, you will not be allowed to exit the screen until you enter a valid (non-blank) code.

Entering and Modifying Code Tables

To display the Code Tables, pull down the Screens menu from the Top Menu Bar and choose Applicant Code Tables or click on the Tables icon button on the Applicant Assistant screen. The list of all available Code Tables will display. Double-click on the desired Code Table or highlight the desired Code Table and click on the OK button. Click on the Cancel button to return to the Top Menu Bar and Applicant Assistant screen.

When you select the desired Code Table, a listing of all your codes for that table selection is displayed.

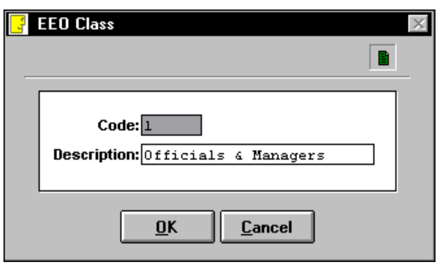


At this point you have 5 options:

You can click on the...	*If you want to....*
Add button	add a new code
Edit button	modify the highlighted code
Delete button	delete the highlighted code
Tables button	return to the list of Codes Tables
Done button	return to the Top Menu Bar

Note: When you delete a code from a Code Table, it will not delete it from Applicant records.

If you choose **Edit**, a screen indicating your selection will appear.



Make any necessary changes. Click on the OK button to save your changes or click on the Cancel button to return to the previous screen without saving your changes. Any change made to a code will update all appropriate applicant records.

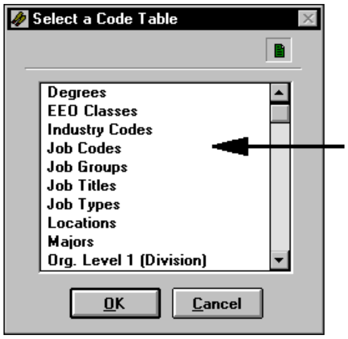
Additional Code Table Instructions

Most Code Tables have only two fields, the code and description, as shown in the previous section. File maintenance on such Code Tables is simple. Other Code Tables require more instructions than previously discussed. These tables provide easy methods for administering job codes and salary grades.

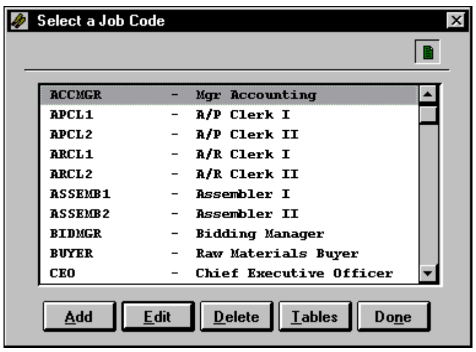
Job Codes Table

Job Codes Table validation is optional. Formalized Job Codes are useful and helpful for reporting purposes in companies of any size. Job Codes Table validation can be Enabled or Disabled on the Company Setup screen under Administrator on the Top Menu Bar. If you Enable Job Code Validation you will need to update the Job Codes Table before entering applicants. See How to Enable/Disable Code Validation later in this chapter.

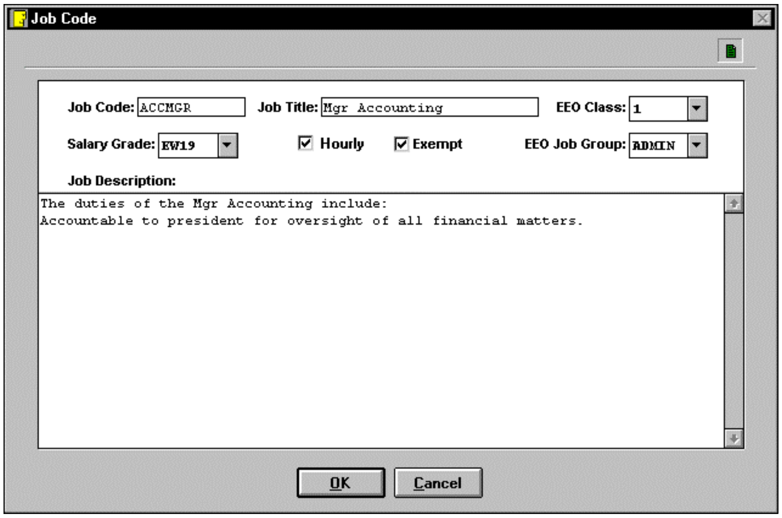
To reach the Job Code Table, pull down Screens from the Top Menu Bar and select Applicant Code Tables or click on the Tables icon button on the Applicant Assistant screen.



Select Job Codes from the Select a Code Table screen.



Select the Job Code to be edited and click on the Edit button.



The Job Codes Table consists of the following data items for each Job Code:

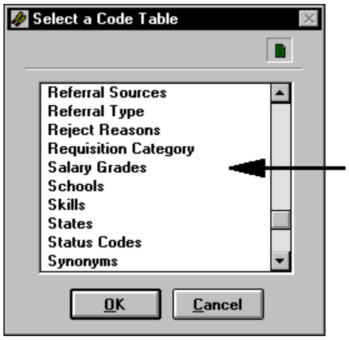
Item Name	Source or Example
Job Code	ACCMGR
Job Title	Mgr Accounting
Salary Grade	Select from the Salary Grade Table
Hourly	Check box if hourly
Exempt	Check box if exempt from overtime
EEO Class	Select from the EEO Class Table
EEO Job Group	Select from EEO Job Group Table
Job Description	Enter text describing the position

If Job Code Validation is Enabled, the Requisition screen prompts for the Job Code only, but not the other seven items listed above. Then, when you finish entering data on the Requisition screen, !Trak-It Applicant automatically looks up the other items in the Job Code Table and displays them on the screen. If Job Code Validation is Disabled, the Requisition screen prompts you for each of the above data items except Job Description which can only be entered on the Job Code screen. The standard !Trak-It Applicant system is shipped with Job Code Validation Disabled. The Demo Data is shipped with the Job Code Validation Enabled, so you can observe how it works.

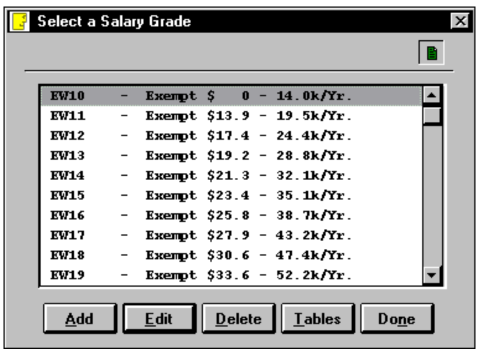
Salary Grades Code Table

Salary Grades Table validation is optional. Larger, more structured companies often use formalized Salary Grades. The Salary Grades Table validation can be Enabled or Disabled via the Company Setup screen under Administrator on the Top Menu Bar. See How to Enable/Disable Job Code & Salary Grade Validation later in this chapter. !Trak-It Applicant is shipped with Salary Grade Validation Disabled. The Demo Data is shipped with Salary Grade Validation Enabled, so you can see how it operates.

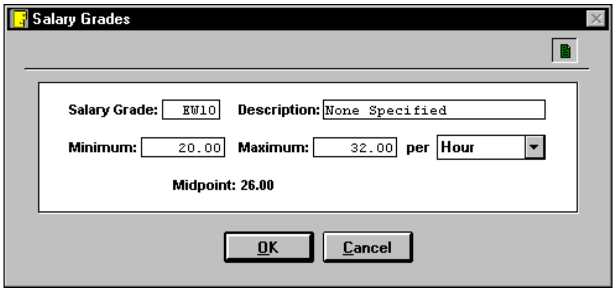
To reach the Salary Grades Code Table, pull down Screens from the Top Menu Bar and select AT Code Tables or click on the Tables icon button on the Applicant Assistant screen.



Select Salary Grades from the Code Table screen.



Select the desired Salary Grade and click on the Edit icon button.



The Salary Grades Code Table consists of the following data items for each Salary Grade:

Item Name	Item Size	Example
Salary Grade Code	6 Characters	EY400
Description	40 Characters	Exempt-$35- 40K/yr.
Minimum Pay Rate	Up to 99999.99	35000.00
Maximum Pay Rate	Up to 99999.99	40000.00
Pay Period	Drop-down menu selection	Year
Midpoint	Up to 99999.99	37500.00

The Midpoint is automatically calculated. If Salary Grade Validation is Enabled when you enter the Job Code on the Requisition screen, the salary grade information (salary grade, minimum pay, maximum pay, and pay period) will automatically display.

Synonyms Code Tables

The Synonyms Code Tables are used for identifying alternate names for: Degrees, Employers, Job Titles, Majors, Positions, Schools and Skills. When !Trak-It Scan scans a resume it looks for any occurrence of the code or a synonym. Thus doing a good job of setting up the synonyms in your industry will be crucial find matches for job requirements.

The way it works is each time you setup a code in one of the above mentioned Code Tables, !Trak-It Applicant automatically creates a synonym for that code in the corresponding Synonym code table, with the code as one value and the description of the code as the second value. You can then select that same code under the corresponding Synonym code table and enter additional synonyms, using the pipe or vertical bar (|) as the delimiter between them, as shown below.

For instance, if you add the skill "C" with a description of "C Programmer" to your Skills code table. When you click on the OK button you automatically create an entry called "C" under the Synonyms for Skills code table with 2 synonyms "C" and "C Programmer" displayed as:

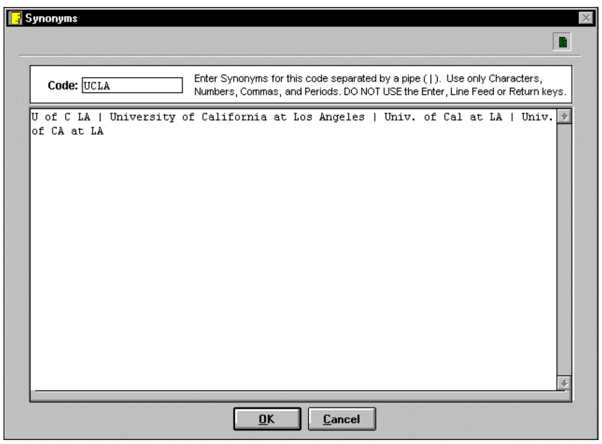
"C|C Programmer"

You can now enter additional synonyms for C such as C+ and C++ etc. creating a list like:

"C|C Programmer|C+|C++|C#"

The next time you use the Scan option !Trak-It Scan will be looking for any occurrence of any of the synonyms and when it finds one it will equate it to "C" in the Skill Codes for that applicant. This makes searches a whole lot easier because all you need to specify as a requirement to match is a skill of "C" and any variation will be found.

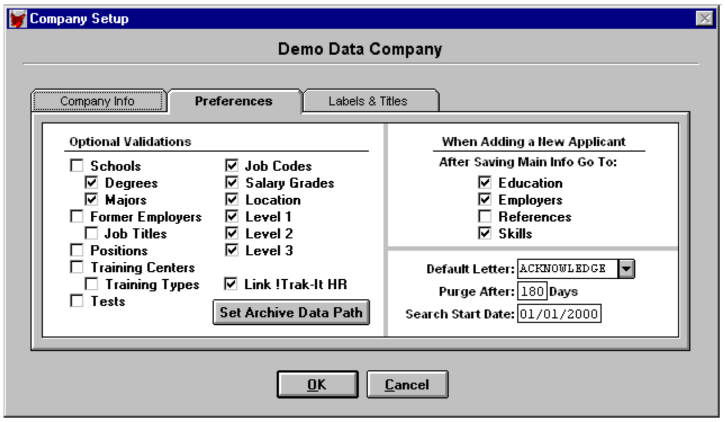
The following screen illustrates another synonym example using the School code UCLA.



Caution: Do *not* use the Enter key, Line Feed key, or Return keys when entering synonyms.

How to Enable/Disable Code Validations

!Trak-It Applicant is shipped with all code table validation disabled. The Demo Data is shipped with some code table validation Enabled so you can observe how it works. To change the validation settings, pull down Administrator from the Top Menu Bar and select Company Setup. To access the Administrator menu you must have System Administrator privileges. Click on the Preferences tab.



Click in the appropriate check box under Optional Validations to enable validation on any of the following Code Tables or databases: *(The screen shown above is for the Standard version. The SBE version has several items turned off.)*

Schools	Job Titles	Tests	Org. Level 1
Degrees	Positions	Job Codes	Org. Level 2
Majors	Training Centers	Salary Grades	Org. Level 3
Former Employers	Training Types	Locations	

Importing Code Tables

Use the Import option under the File menu to import existing !Trak-It HR Code Tables into !Trak-It Applicant. If you do not use !Trak-It HR, still many of your existing codes can be imported using a spread sheet program. See Appendix C - Exporting and Importing Data.

Synchronization of Code Tables with HR

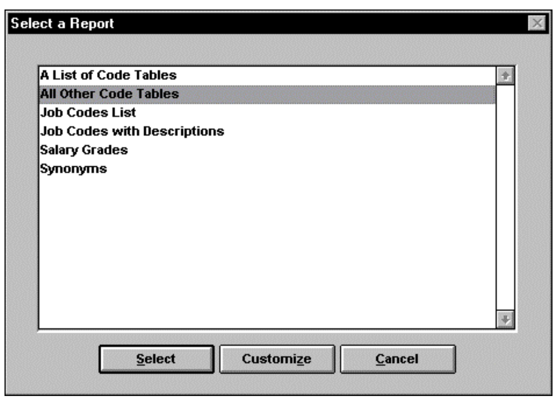
If you use !Trak-It HR, many of the codes from your Code Tables are the same codes used for !Trak-It Applicant. It is possible for the codes to get out of sync, especially if they are entered or updated manually. A utility is available to synchronize your tables via the synchronize data option on the Administrator menu. See the chapter, *Utilities and Administrator*, to learn how to synchronize selected Code Tables used in !Trak-It HR with those used in !Trak-It Applicant.

Printing Code Tables

After you have set up your code tables, it is a good idea to print a copy for the person who does data entry so they will be familiar with your chosen codes before they start entering data. To obtain a printed report of a Code Table, pull down Reports from the Top Menu Bar or click on the reports icon on the Assistant screen, then choose Code Tables.

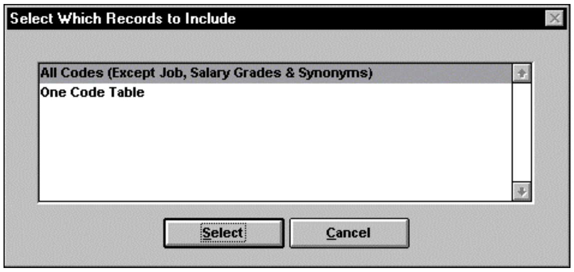
Select from the List of Code Tables which to display or printout. If you select All Other Code Tables, you will get a printout of all Code Tables except the Job Codes, Salary Grades, and Synonyms tables. You can also click on Customize to create a copy of the selected report and then modify the contents or format to meet your needs.

1. **Click on your selection and then click on the Select button.**

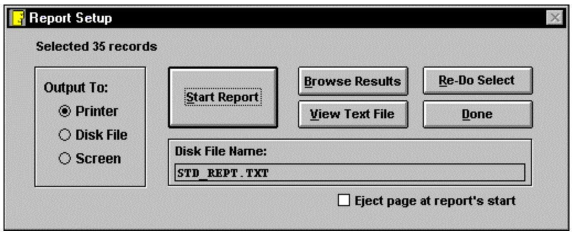
   Click on the Customize button to customize your own report. Refer to the *Custom Report Guide Manual* for more information on the Customize button.

2. **Click on the desired selection and click on the Select button.**



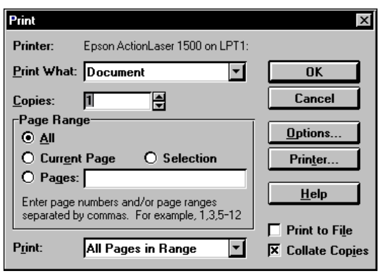
If you select One Code Table, you will be prompted to enter a comparison value of one code table. If you select All Codes, the following Report Setup is displayed.

3. **Click on the radio button, Printer, to output the report to the printer. Click on the Start Report button.**



The standard Print dialog box is displayed for you to print your report.

4. **Click on the OK button to print your report.**



Click on the Cancel button to return to the Top Menu Bar and Applicant Assistant screen without printing your report. When your report has been printed, the Report Setup is re-displayed.

5. **Click on the Done button to return to the Top Menu Bar and Applicant Assistant screen.**

Now you are ready to start entering your Job Requisitions!

Chapter 5
Top Menu Bar and Tool Bar

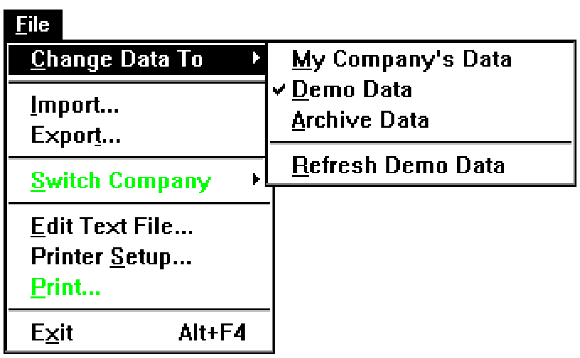
This chapter discusses the first three selections — File, Edit, and Commands — on the Top Menu Bar. Also included in this chapter are the very useful Applicant Assistant screen and the Tool Bar. The Applicant Assistant screen is displayed as a quick way to access all items in the Screens menu and to quickly display the Code Tables and Reports menus or exit from !Trak-It Applicant. The Tool Bar appears whenever an applicant screen is available for viewing or updating.

Top Menu Bar

The Top Menu Bar is the horizontal strip containing the menu items that is always displayed at the top of your screen. Selecting a menu item causes the item to be highlighted and a list of its contents to appear as a drop-down menu below it. You can choose any item from any menu as long as the item is not dimmed.

File Menu

The first item on the Top Menu Bar is the File Menu. The File Menu allows you to select the desired data file, edit text files, set up printer settings, print and exit !Trak-It Applicant. When you select an item which has an ellipsis (for instance, Edit Text File...), a dialog box or submenu appears providing additional information or selections.



Change Data to

This option changes the data !Trak-It Applicant uses: Select My Company's Data, Demo Data, or Archive Data. The data choice you are accessing is displayed at the bottom of the Applicant Assistant screen. Choose Refresh Demo data to restore Demo data to its' original condition including the restoration of the demo resumes.

Import

Import is available to import code tables and data from !Trak-It HR and from spreadsheet accessible data such as Excel. See Appendix C – Exporting and Importing Data.

Export

Exports to export !Trak-It Applicant data to other applications such as Excel or ASCII files. See Appendix C – Exporting and Importing Data.

Switch

Switch is used to change to a different company when using the extra cost multi-company option.

Edit Text File

Edit Text File allows you to modify a text file. The standard open dialog box appears so you can select the desired file. You can edit a file just as you would with a word processor.

Printer Setup

Use Printer Setup to select an installed printer and set up other options when printing your reports. Consult your computer documentation for more information about setting up your printer and printing.

Print

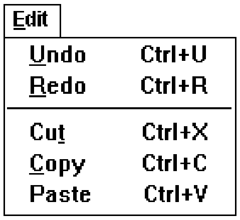
When you output your report to the screen, you may print your report using this option.

Exit

Use Exit to leave !Trak-It Applicant at any time.

Edit Menu

The next item on the Top Menu Bar is the Edit Menu. When any of the applicant screens are displayed in edit mode, the editing selections are available via the Edit menu or keyboard shortcut keys.

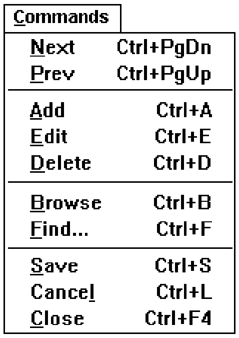


The following table describes the selections and shortcuts on the Edit menu. On the Macintosh use the Command key in place of the Ctrl key.

Undo (Ctrl+U)	If you make a mistake, you can “undo” the most recent text-editing action. There are certain actions you can’t undo.
Redo (Ctrl+R)	Redo can repeat most recent actions. There are certain actions that you cannot redo.
Cut (Ctrl+X)	Cut removes the selected (highlighted) characters and places them on the Clipboard (replacing the previous Clipboard contents, if any).
Copy (Ctrl+C)	Copy puts a copy of the selected characters onto the Clipboard, just like Cut, but the original characters stay where they were when you copied them.
Paste (Ctrl+V)	Paste puts a copy of the contents of the Clipboard at the insertion point (where your cursor is positioned). You can continue to paste copies of these characters until you do another cut or copy a new selection.

Commands Menu

When a screen is displayed, you can pull down the Commands menu and select one of the menu items to edit a screen. These commands always refer to the currently active screen. For example, if a Skills screen is displayed, then the Commands all refer to Skills.



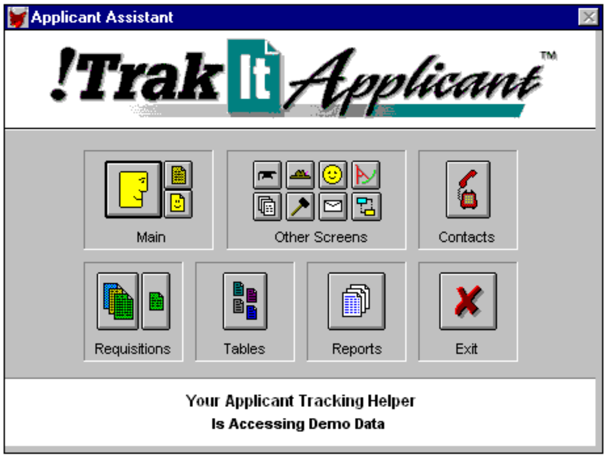
The following table describes the commands on the Commands menu. Enclosed in parentheses are the Shortcuts to the commands that can be used without accessing the Commands menu. Once the Commands menu is displayed, you can enter the underlined letter of the command to select the command without having to move the highlight to that command to select it.

Next (Ctrl+PgDn)	When a screen is displayed, you may conveniently move to the next record by selecting the Next command. This command functions the same as the Down Arrow icon button on the Tool Bar.
Prev (Ctrl+PgUp)	When a screen is displayed, you may conveniently move to the previous record by selecting the Prev command. This command functions the same as the Up Arrow icon button on the Tool Bar.

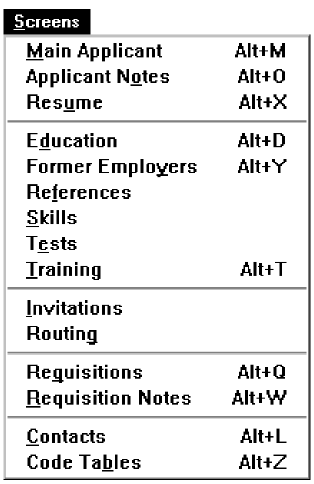
Add (Ctrl+A)	When no screen or a Main Applicant screen is displayed, choose Add to enter a new applicant. When a Former Employer screen is displayed, choose Add to enter an additional employer and the pertinent information. When a Code Table screen is displayed, choose Add to enter a new code for that particular table. This command functions the same as the Add icon button on the Tool Bar.
Edit (Ctrl+E)	When a screen is displayed, choose Edit to change the displayed information. This command functions the same as the Edit icon button on the Tool Bar.
Delete (Ctrl+D)	When a screen is displayed, choose Delete to delete the displayed record. This command functions the same as the Delete icon button on the Tool Bar.
Browse (Ctrl+B)	Choose Browse to view available records. Click on an item of interest and press the Enter key. This command functions the same as the Browse icon button on the Tool Bar.
Find… (Ctrl+F)	When a Main Applicant screen is displayed, choose Find to select another applicant. This command functions the same as the Find icon button on the Tool Bar.
Save (Ctrl+S)	Save will save the changes on the currently displayed screen. This command functions the same as the Save icon button on the Tool Bar.
Cancel (Ctrl+L)	Cancel will cancel the edit mode and not save your changes. This command functions the same as the Cancel icon button on the Tool Bar.
Close (Ctrl+F4)	Close will close the currently displayed screen. This command functions the same as the Close icon button on the Tool Bar.

Applicant Assistant Screen

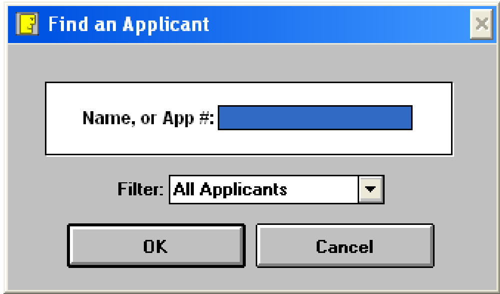
To assist you in accessing Screens, Requisitions, Contacts, Code Tables or Reports, click on the icon button of your choice on the Applicant Assistant screen. The Applicant Assistant is available when no other screen is displayed.



Another way to access a screen is to pull down the Screens menu from the Top Menu Bar and make a selection.



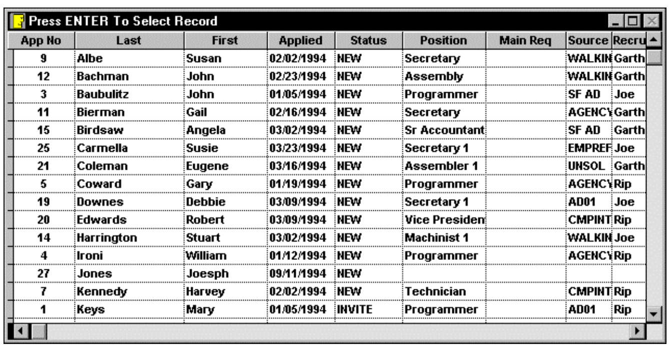
When you make a screen selection, the following Find an Applicant screen is displayed.



Enter an applicant's last name or applicant number and click on the OK button to select that applicant's information. Click on the Cancel button if you want to return to the Top Menu Bar. There are also several filter options available: All Applicants, One Current Status, One Main Requisition, One Position Desired, One Recruiter, One Source.

> **Hint:** It is not necessary to enter the entire name. If you have only one applicant named Coleman and no other applicants' names begin with Col, just enter Col to find Coleman. Also, if you have 10 Smiths, enter Smith,G to find George Smith.

If the name or applicant number is not found, a screen listing of applicants is displayed with the applicant closest to your selection highlighted. The listing will be in applicant number sequence if you entered a number or in order by last name if you entered a name not found on your database. Entering the first character of the last name will quickly bring the cursor to the first applicant record that starts with that character. Clicking on an item in any column will resort that column.

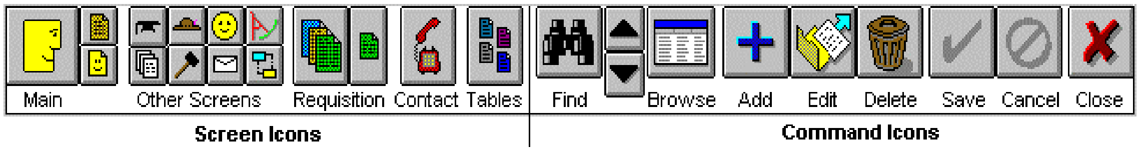

Press ENTER To Select Record

App No	Last	First	Applied	Status	Position	Main Req	Source	Recru
9	Albe	Susan	02/02/1994	NEW	Secretary		WALKIN	Garth
12	Bachman	John	02/23/1994	NEW	Assembly		WALKIN	Garth
3	Baubulitz	John	01/05/1994	NEW	Programmer		SF AD	Joe
11	Bierman	Gail	02/16/1994	NEW	Secretary		AGENCY	Garth
15	Birdsaw	Angela	03/02/1994	NEW	Sr Accountant		SF AD	Garth
25	Carmella	Susie	03/23/1994	NEW	Secretary 1		EMPREF	Joe
21	Coleman	Eugene	03/16/1994	NEW	Assembler 1		UNSOL	Garth
5	Coward	Gary	01/19/1994	NEW	Programmer		AGENCY	Rip
19	Downes	Debbie	03/09/1994	NEW	Secretary 1		AD01	Joe
20	Edwards	Robert	03/09/1994	NEW	Vice Presiden		CMPINT	Rip
14	Harrington	Stuart	03/02/1994	NEW	Machinist 1		WALKIN	Joe
4	Ironi	William	01/12/1994	NEW	Programmer		AGENCY	Rip
27	Jones	Joesph	09/11/1994	NEW				
7	Kennedy	Harvey	02/02/1994	NEW	Technician		CMPINT	Rip
1	Keys	Mary	01/05/1994	INVITE	Programmer		AD01	Rip

Use the scroll bars and position the cursor on an applicant then double-click or press the Enter button on the keyboard to select that applicant. When a screen is displayed, the Tool Bar comes into view below the Top Menu Bar.

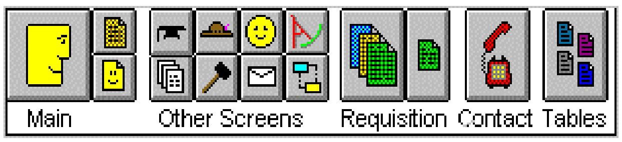
Tool Bar

When any of the selections from the Screens menu are displayed, the Tool Bar becomes available. The Tool Bar consists of icons representing most selections from the Screens and Commands menus on the Top Menu Bar. The left section of the Tool Bar contains the Screen icons and the right section contains the Command icons. All of the icons in the left section of the Tool Bar are the same ones that are available on the Applicant Assistant screen.



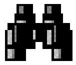
Screen Icons

If a screen is displayed, you can click on any of the screen icons on the Tool Bar to quickly select another screen. The same icons are also available on the Applicant Assistant screen. These icons and the corresponding Screen menu will be discussed in the next chapter.



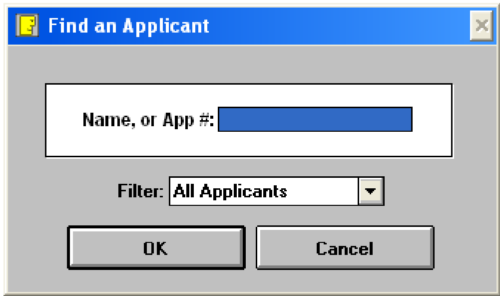
Command Icons

The Command icons correspond to the same selections found under the Commands menu on the Top Menu Bar.

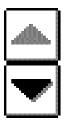


Find Icon

When an applicant screen is displayed, choose Find to select another applicant's information. If a contact screen is displayed, use the Find icon to find another contact. If a requisition screen is displayed, use the Find icon to find another requisition.

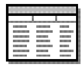


Enter an applicant's last name or applicant number and click on the OK button to select that applicant's information. Click on the Cancel button if you want to return to the Top Menu Bar. There are also several filter options available: All Applicants, One Current Status, One Main Requisition, One Position Desired, One Recruiter, One Source.



Next and Previous Icon

When a Main Applicant screen is displayed, click on the Down Arrow icon button to find the next applicant in the database in alphabetical order. Click on the Up Arrow icon button for the previous applicant in the database. If a screen other than Main Applicant is displayed, such as Education, Former Employers, References, Skills, Tests, or Training, then the next or previous record for the selected applicant will be displayed. If the Down Arrow is dimmed there are no further records to display. If the Up Arrow is dimmed there are no previous records to display.



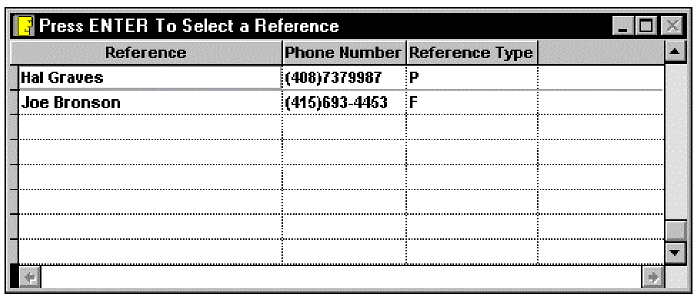
Browse Icon

Click on the Browse icon button to display a listing of the available records in the currently displayed database. For example: If a Main Applicant screen is displayed, click on the Browse icon button to display a listing of all applicants.

Press ENTER To Select Record

Last	First	App No	SSN	Applied	Position
Adams	Sam	28	987-65-4321	01/03/1995	Manager
Albe	Susan	9	235-90-3476	03/02/1994	Secretary
Bachman	John	12	323-45-6767	02/03/1994	Assembler 1
Baubulitz	John	3	544-32-4449	03/21/1994	Programmer
Bierman	Gail	11	345-55-6788	02/23/1994	Secretary 1
Birdsaw	Angela	15	562-83-2221	03/21/1994	Sr Accountant
Carmella	Susie	25	543-90-1111	03/29/1994	Secretary 1
Coleman	Eugene	21	735-71-6638	04/01/1994	Assembler 1
Coward	Gary	5	548-56-6528	02/02/1994	Programmer
Downes	Debbie	19	463-23-7698	03/25/1994	Secretary 1
Edwards	Robert	20	432-55-6110	02/28/1994	Vice President
Harrington	Stuart	14	563-78-2331	03/26/1994	Machinist 1
Ironi	William	4	555-55-5555	02/09/1994	Programmer

Another example of Browse: If a References screen is displayed, click on the Browse icon button to display all the references for that applicant.



Press ENTER To Select a Reference

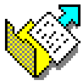
Reference	Phone Number	Reference Type
Hal Graves	(408)7379987	P
Joe Bronson	(415)693-4453	F

You can browse through the applicant's data not shown in the window by using the scroll bars at the bottom and right side of the window. Click on a selection and then press the Enter key or simply double-click on a selection to display information for a particular record.

Add Icon

Click on the Add icon button to add a record to the currently displayed database.

For example: To add a new Skill record for an applicant using this icon, you must have the applicant's Skill screen displayed. Click on the Add icon button. !Trak-It Applicant displays a blank Skill screen in the Edit mode ready for the new Skill entry for that applicant.



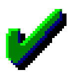
Edit Icon

When an informational screen is first displayed it is always in view mode. In order to make changes you must go to edit mode. Click on the Edit icon button on the Tool Bar to allow the data on the currently displayed screen to be changed. Or you can pull down the Edit menu on the Top Menu Bar and select any of the editing commands.

Delete Icon

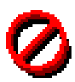
When a screen is displayed, click on the Delete icon button to delete the displayed record. When deleting, the following alert message is displayed, giving you a chance to change your mind before deleting the record.

Click on the Yes button to confirm the deletion. Click on the No button for the information to be retained as it was prior to selecting Delete.



Save Icon

Click on the Save icon button on the Tool Bar to save the edited information on the currently displayed screen. The Save icon is available in Edit or Add modes only — not in View mode.



Cancel Icon

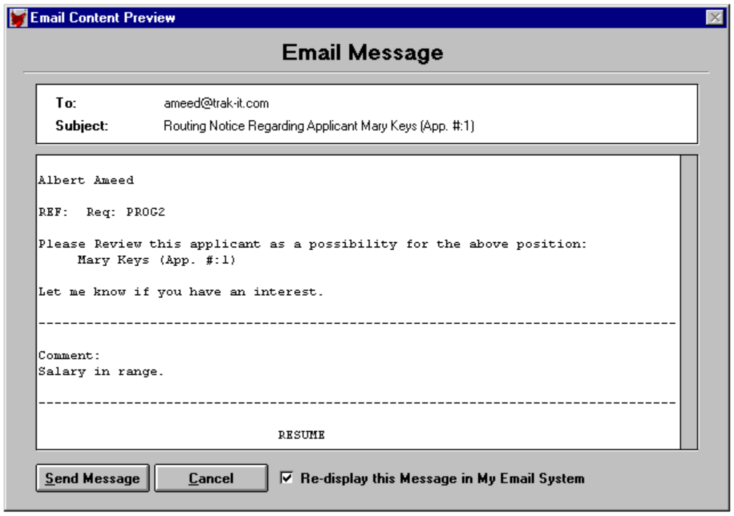
Click on the Cancel icon button on the Tool Bar to cancel edit mode and not save your changes. The Cancel icon is available in Edit or Add modes only — not in View mode.

Close Icon

Click on the Close icon button to close the currently displayed screen.

Emailing From !Trak-It Applicant

!Trak-It Applicant is email enabled, meaning that you can email the contents of many of the screens with Applicant or Requisition information by simply clicking the Email button on the screen. For example you can email an Acknowledgement letter to an applicant instead of printing one and sending it via snail mail. Or you can send a manager a reminder that an interview is scheduled for tomorrow at noon.



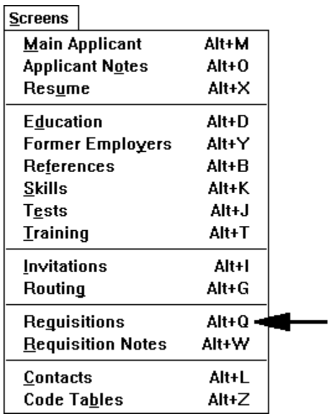
There is no system setup required since the email functionality uses your system's MAPI emailer. When you click on an email button the corresponding email is composed and displayed. You can edit the contents or change the address etc. Then click on the Send Message button and it is sent. Optionally you can have the email re-displayed inside your email system for further editing or to perhaps use your email address book to address the email.

You can also design your own email letters to send to Applicants as well as send a batch of emails to a group such as all applicants who applied for a particular requisition.

Chapter 6
Requisitions

The requisition system in !Trak-It Applicant allows you to easily enter and monitor the open positions, the status of any offer, requirements and related requisition costs. The multi-part Requisitions screen and the related Requisition Notes screen are used to enter information on each requisition.

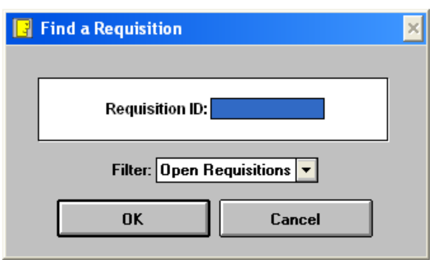
To view a sample requisition, change data to Demo Data on the File menu. After switching to the Demo Data, pull down the Screens menu from the Top Menu Bar to select Requisitions **or** click on the Requisitions screen icon button on the Applicant Assistant screen.



Screens Menu

Applicant Assistant Screen

When you select Requisitions, the following Find a Requisition screen is displayed.



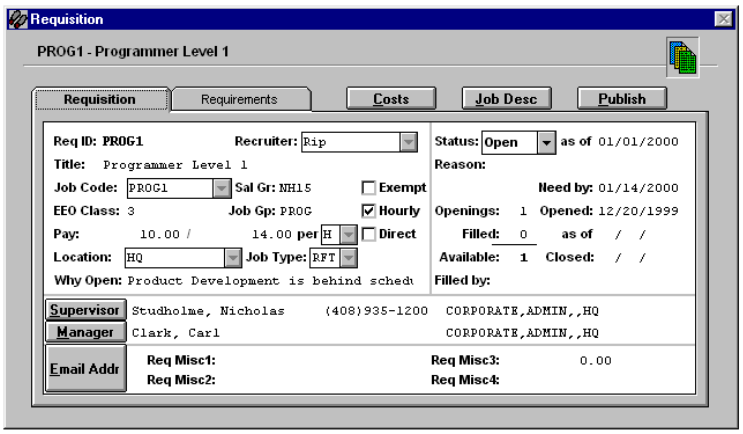
Enter the Requisition ID and click on the OK button to select that Requisition's information. Click on the Cancel button if you want to return to the Applicant Assistant screen. If you are only interested in the job requisitions of a certain status such as "Closed," set the filter dropdown to One Status then double-click Closed. The default is All Open Requisitions. You could also choose: All Requisitions or One Recruiter.

If the entered Requisition ID is not found, a browse listing of all Requisitions is displayed. Entering the first character of the Requisition ID will quickly bring the cursor to the first Requisition record, which starts with that character.


Press ENTER To Select Record

Req ID	Requisition Title	Recruiter	Current Status	As Of	Opened	Closed
ACCOUNTANT	Sr Accountant	Garth	Open	01/02/1994	01/02/1994	/ /
ARTIST	Graphic Artist	Rip	Open	01/05/1994	01/05/1994	/ /
ASSEM1	Beginning Assembler	Joe	Open	01/12/1994	01/12/1994	/ /
CONSUL	Consultant	Rip	Open	01/16/1994	01/16/1994	/ /
CUS2	Cust Support Lev2	Rip	Open	02/03/1994	02/03/1994	/ /
ENGR1	Engineer Lev 1	Garth	Open	03/15/1994	03/15/1994	/ /
ENGR2	Engineer Lev 2	Garth	Open	02/14/1994	02/14/1994	/ /
HRMGR	Mgr Human Resource	Garth	Open	01/15/1994	01/15/1994	/ /
MACH1	Journeyman Machinist	Rip	Open	01/05/1994	01/05/1994	/ /
MGR-CUS	Mgr Customer Serv	Garth	Open	02/03/1994	02/03/1994	/ /
MGR-ENG	Mgr Engineering	Garth	Open	01/05/1994	01/05/1994	/ /
MGR-OFF	Office Manager	Garth	Open	01/10/1994	01/10/1994	/ /
MGR-PROG	Program Manager	Garth	Open	01/19/1994	01/19/1994	/ /
PROG-ADV	Advisory Programmer	Rip	Open	03/14/1994	03/14/1994	/ /
PROG1	Programmer Lev 1	Rip	Open	01/02/1994	01/02/1994	/ /
PROG2	Programmer Lev 2	Rip	Open	01/02/1994	01/02/1994	/ /

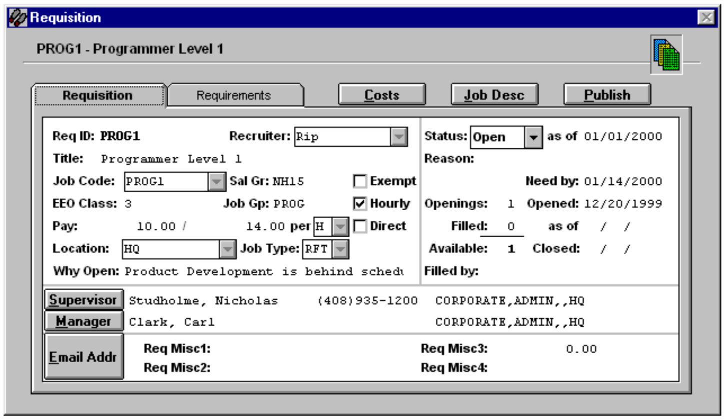
Use the scroll bars and position the cursor on the requisition of your choice and either double-click or press the Enter button on the keyboard to select that requisition. The Requisition screen for your selection is displayed.



The Requisition screen is a multi-part screen used to enter all information related to your requisitions for positions to be filled within your company. Most of the information is contained on the two available tabs—requisition and requirements. Clicking on one of three buttons—Costs, Job Desc, and Publish, accesses the remaining information. The data elements for the Requisitions screen are described in the appendix, *Screen Data Elements*.

Requisition Tab

Most of the information for your job opening is contained on the requisition tab of the Requisition screen.



The requisition tab contains your unique Req ID, title, pay information for the position, recruiter identification, current number of openings, number of positions filled, and current status of the opening. Additionally, job information such as salary grade, EEO class, supervisor and manager names and phone numbers are available on the requisition tab. Dates related to the requisition such as date opened, need by date, and position filled date are also displayed. Four miscellaneous fields are available for your use. The titles for these fields can be customized via the Administrator menu under the Company Setup Preferences tab.

The methods of adding a new requisition record, editing or deleting an existing record, and browsing records are similar for all !Trak-It Applicant screens as discussed previously. However, when Add is chosen, there is an optional choice to duplicate the currently selected requisition, thus saving you much data entry time for similar requisitions.

Note: Although the requisition examples use an alphabetic requisition identification system, you can use numbers, abbreviations, acronyms, or a combination of alphabetic and numeric characters. Use whatever system works best for you.

Requisition Field Validations

Certain fields on the Requisition screen can be optionally validated if you want to ensure consistency of data. You can enable or disable validation of these fields via the Administrator menu under the Company Setup Preferences tab. See the How to Disable/Enable Code Validations section in the chapter, *Understanding Code Tables,* of this manual.

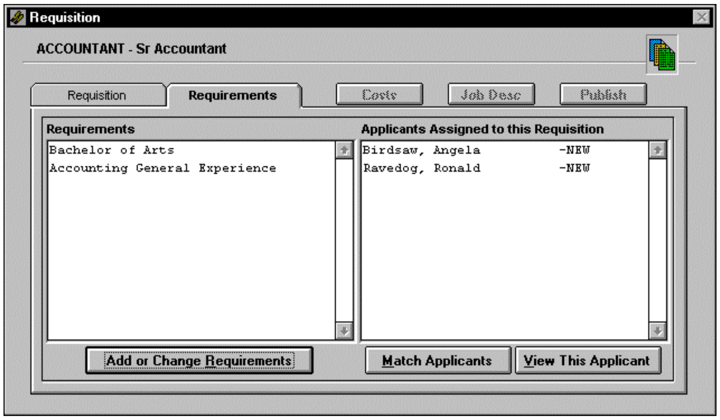
Emailing from the Requisition Screen

Clicking on the Supervisor button will generate an email to the supervisor listed for this requisition. The email consists on most of the data displayed on the screen and can be used to confirm that the data items have been entered correctly. Once the email has been generated and displayed in the !Trak-It Applicant email screen it can be edited before sending.

To enter or change to a supervisor's or manager's email address click on the Email Addr button and enter the new address, then click OK to return to the requisition screen.

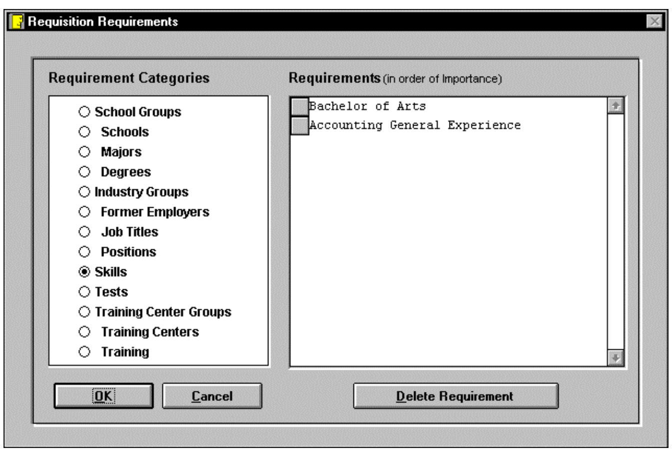
Requirements Tab

Click on the requirements tab of the Requisition screen to display the requirements and a list of applicants currently assigned to this requisition.

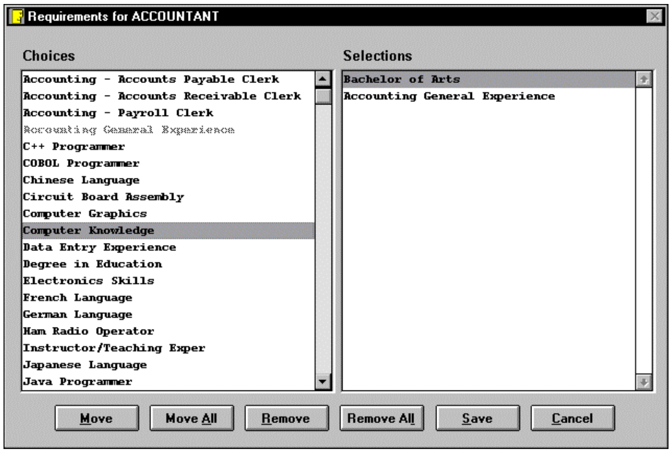


Requirements

The left side of the screen is for adding, deleting, or changing requirements specified for this requisition. To add, delete, or change a requirement, click on the Add or Change Requirements button on the bottom of the Requirements scroll box on the left side of the screen. A Requirements screen will display a list of requirement categories and the current Requirements for the requisition.

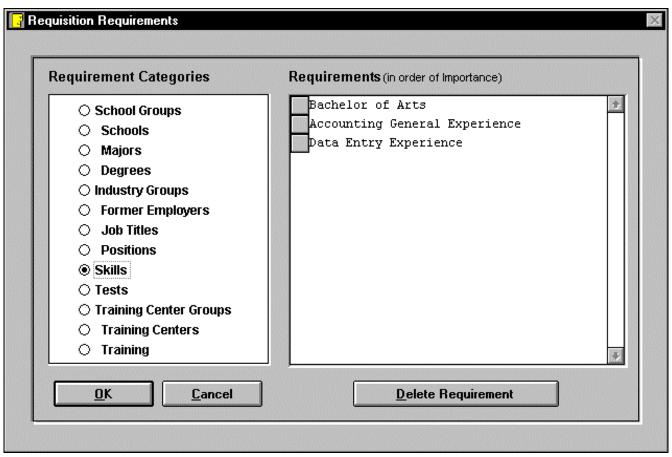


The right side of the Requirements screen will display all current requirements for the requisition. To delete a current requirement, select the requirement on the right side of the screen and click on the Delete Requirement button. Click on the radio button of the requirement category you want to add to your requisition. The selection screen for the requirement category will display. The choices are from your Code Table for the selected category.

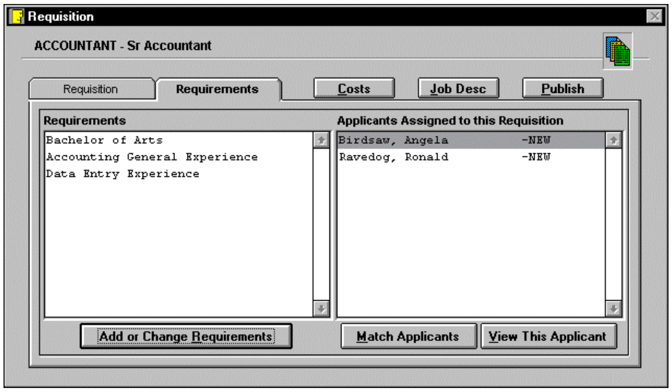


A list of choices appears in the scrolling box on the left. Select the requirement of choice by double-clicking on it or clicking on the move button at the bottom of the screen. The choice will then become a selection on the right of the screen in the selection box and be dimmed in the choices box. Click on the Remove button if you need to remove a requirement from the currently displayed category in the selection box on the right. It will appear back in the choice box on the left. To remove all requirements for the category, simply click on the Remove All button. Click on the Save button to have your selections applied as requirements for your requisition.

The Requirements screen will re-display with any changes to the requirements displayed on the right.



If you have any further requirements you need to add, repeat the process. When all requirements are specified, you can set the order of importance using the right section of the screen. Click on the box to the left of the requirement whose order of importance needs to be changed. A double-headed arrow will appear. Drag the requirement up or down to change its order of importance, positioning the requirement in the correct sequence. When the importance of all requirements have been specified, click on the OK button to return to the Requisition screen.



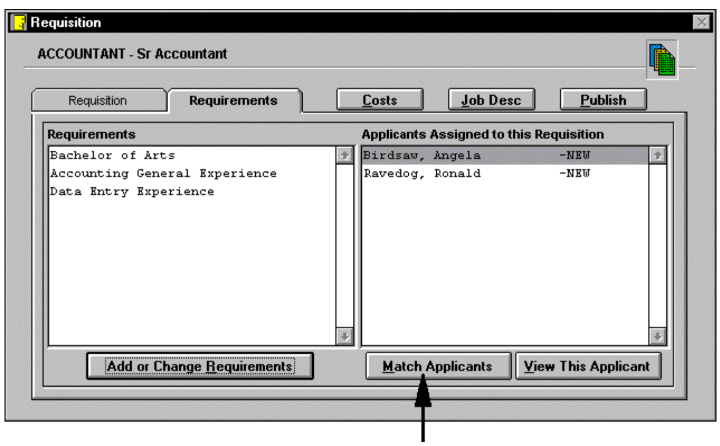
The requirements will appear in order of specified importance in the requirements box on the left of the screen.

Applicants Assigned to This Requisition

The section on the right of the Requirements tab of the Requisition screen will display a list of applicants, if any, that have been assigned to the requisition. You can find and view qualified applicants from this screen.

Match Applicants

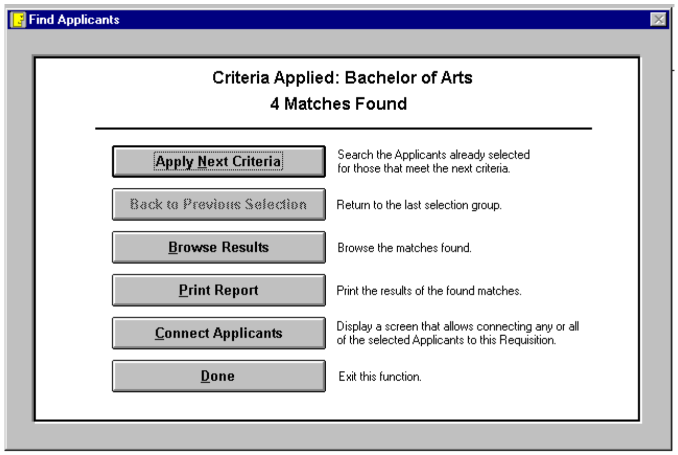
You can automatically find applicants who meet some or all of the requirements of the requisition by clicking on the Match Applicants button at the bottom of the screen.



A search will begin for all applicants who meet the first (or most important) requirement according to the ranking you established. The Find Applicants screen will display the number of applicants found who meet the first requirement.

Click on the **Apply Next Criteria** button to search the currently selected applicants to see if they meet the next requirement. If no applicant meets the next criteria, you can click on the **Back to Previous Selection** button to return to the last selection results.

Click on the **Browse Results** button to view the selected applicants.



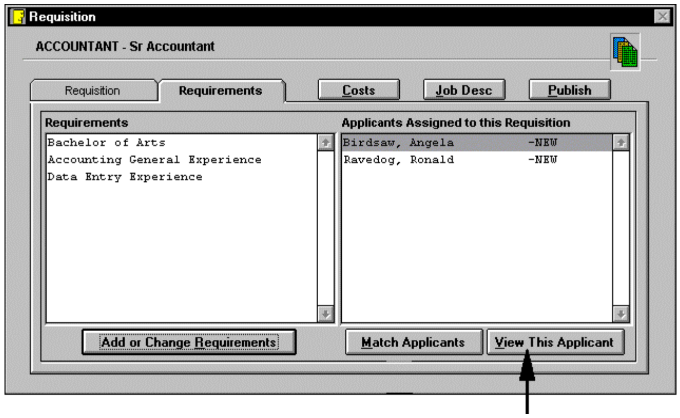
To get a printed copy of the results, click on the **Print Report** button.

To assign the requisition to one or more of the qualified applicants, click on the **Connect Applicants** button. A browse list of qualified applicants will appear.

Double-click on the applicants to connect to the requisition. Click on the OK button to return to the Find Applicant screen. Click on the **Done** button to return to the Requisition screen.

View This Applicant

Select an applicant whose record you want to view and click on the View This Applicant button to view the Main Applicant screen for the selected applicant.



From the Main Applicant record you may want to assign a letter to be sent to the applicant indicating the applicant's qualification for your requisition.

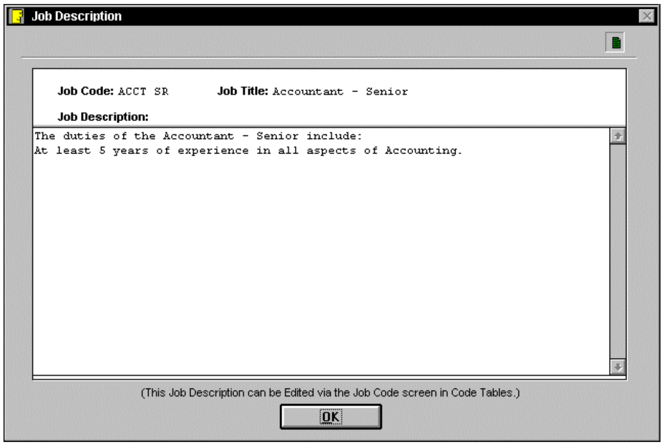
Costs

All requisitions incur certain costs such as interviewing, travel, relocation, advertising, and agency fees. Click on the Costs button on the Requisition screen to view, edit, or add any costs applicable to the requisition.

The total cost is automatically calculated and displayed for you. The titles for these fields can be customized via the Administrator menu under the Company Setup Preferences tab.

Job Description

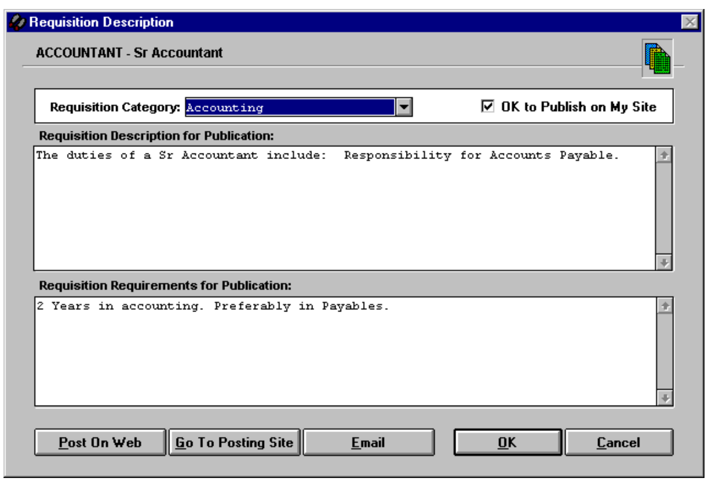
The complete job description for the requisition can be viewed by clicking on the Job Desc button on the Requisition screen. The Job Description screen will display the job code, job title, and job description for the requisition.



You can edit the description through the Code Table for Job Codes.

Publish

If you are using the !Trak-It Web Interface extra cost option, the Publish screen is an important part of your interface. The Interface provides a bridge between interested applicants and your company. Click on the Publish button on the Requirements screen to view the Requisition Description screen associated with the information you want to have published on your web site.



Enter a requisition category from on the drop-down list based on the Requisition Category code table. Enter the job description that you want to appear on your web site for this requisition in the first scrolling box. Enter the requirements for the position in the second box. Click on the OK to Publish check box when you are satisfied with the information you have entered on the screen. It will not be available for publication unless you have indicated such.

You can also email the displayed information and associated requisition data via the Email button to whom ever you wish. As with the other email buttons throughout !Trak-It Applicant, once the email message is displayed it can be edited as well as sent to your email application so you can use your emailer's address book.

To post this job to an affiliated posting service click on the Post on Web button, the displayed requisition data along with data from the requisition screen will be automatically transmitted to the chosen posting service or site. Clicking on the Go To Posting Site button provides easy access to the posting site without attempting to post a job requisition. See the Appendix on web connections for more details.

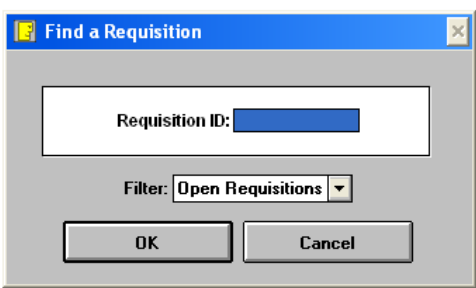
Requisition Notes*

The Requisition Notes screen is used to enter any additional notes pertaining to the requisition that may be necessary to record for history purposes. Requisition notes can be used to pass on information to others working with the same requisition. A requisition may have multiple requisition notes records.

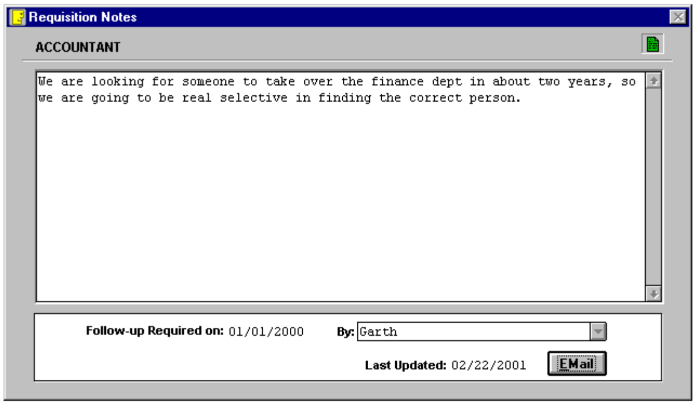
The Requisition Notes screen also contains the date last updated, a follow-up date, and recruiter name. A standard report can be run to provide a list of requisitions requiring follow-up based on the follow-up date or recruiter entered on the Requisition Notes screen.

To access the Requisition Notes screen, pull down the Screens menu from the Top Menu Bar and select Requisition Notes **or** click on the Requisition Notes icon button to the right of the Requisitions icon button on the Applicant Assistant screen. If a requisition is currently open, clicking on the Requisition Notes icon on the Tool Bar will that requisition's note.

Other wise enter the Requisition ID and click on the OK button to select that requisition's notes screen. Click on the Cancel button if you want to return to the Top Menu Bar and Applicant Assistant screen.



A browse listing of all requisition notes for the requisition is displayed. Use the scroll bars and position the cursor on the note of your choice and double-click or press the Enter key on the keyboard to select that note. The Requisition Notes screen for your selection is displayed.



Click on the Edit button on the Tool Bar to update existing notes for the requisition. If it is a new requisition note screen, you will already be in the edit mode and a default follow-up date of one week is automatically entered which can be changed as needed. The recruiter field will default to the recruiter entered on the requisition. Select another recruiter from the drop-down list as needed. Click on the Close or Cancel button when done to return to the Top Menu Bar and Applicant Assistant screen.

Click on the Email button to send this note to someone. When the Email note is displayed, you can enter the email address or click send and the email will re-appear in your email application and you can use it's address book to send it.

Follow-up Note Queue and Reminders*

By entering a date and a picking a name from the drop-down, you have set a trigger so that on the appointed day after that person logs into !Trak-It Applicant the Note Queue screen appears, reminding them to take action on this Requisition or particular Applicants since there is a similar function associated with the Applicant's Note Screen.

Now you are ready to start entering your Applicant Information!

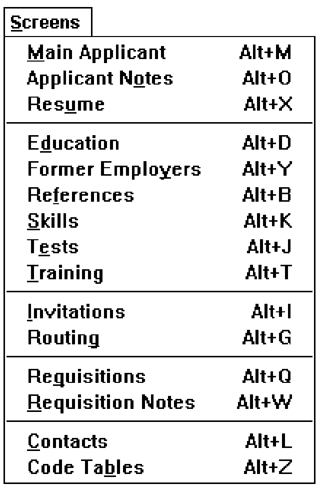
Notes:

Chapter 7
Screens and Applicant Data

The Screens menu allows you access to choose the screen to view, add and change related applicant information, requisitions, contacts, and code tables. The Applicant Assistant screen also allows you to access all of the applicant screens as well as the code tables and reports. In this chapter the Main Applicant, Applicant Notes, Resume, Education, Former Employers, References, Skills, Tests, Training, Invitations, and Routing screens will be discussed in the order they appear on the Screens menu. The data elements for each of the screens are described in the appendix, *Screen Data Elements*.

Displaying a Screen

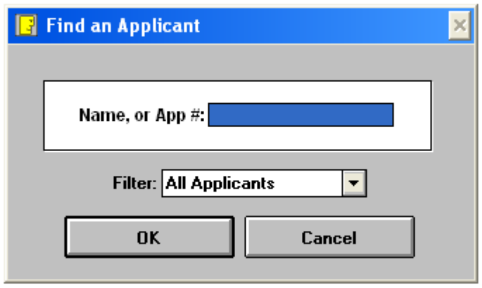
Pull down the Screens menu from the Top Menu Bar to select a screen **or** click on the desired screen icon button on the Applicant Assistant screen.



Screens Menu *Applicant Assistant Screen*

You can use any of !Trak-It Applicant’s keyboard shortcuts displayed on the Screens menu at any time. The key combination to the right of a command is a keyboard shortcut for choosing the command. You can press the keys listed to choose the command without first opening the menu. For example, when a Main Applicant screen is displayed, hold down the Alt key and then press the letter E to display the Education screen. A listing of all the keyboard shortcuts is located in the preface of this manual. Note that all Screen keyboard shortcuts are the Alt key plus a character on the PC. Commands are the Ctrl key plus a character on the PC.

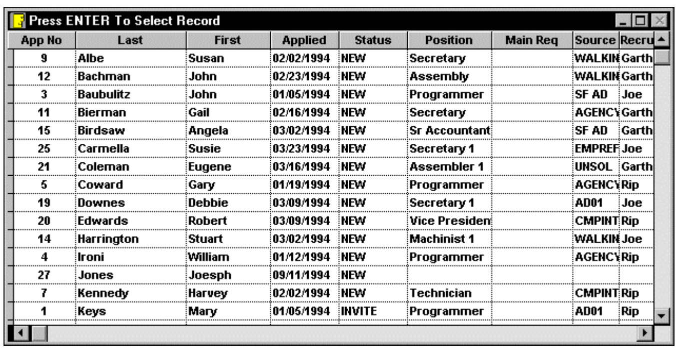
When you make a screen selection, the Find An Applicant screen is displayed.



Enter an applicant's last name or applicant number and click on the OK button to select that applicant's information. Click on the Cancel button if you want to return to the Top Menu Bar. There are also several filter options available: All Applicants, One Current Status, One Main Requisition, One Position Desired, One Recruiter, One Source.

Hint: It is not necessary to enter the entire name. If you have only one applicant named Coleman and no other applicants' names begin with Col, just enter Col to find Coleman. Also, if you have 10 Smiths, enter Smith,G to find George Smith.

If the name or applicant number is not found, a screen listing of applicants is displayed with the applicant closest to your selection highlighted. The listing will be in applicant number sequence if you entered a number or in order by last name if you entered a name not found on your database. . Entering the first character of the last name will quickly bring the cursor to the first applicant record that starts with that character. Clicking on an item in any column will resort that column.


Press ENTER To Select Record

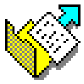
App No	Last	First	Applied	Status	Position	Main Req	Source	Recru
9	Albe	Susan	02/02/1994	NEW	Secretary		WALKIN	Garth
12	Bachman	John	02/23/1994	NEW	Assembly		WALKIN	Garth
3	Baubulitz	John	01/05/1994	NEW	Programmer		SF AD	Joe
11	Bierman	Gail	02/16/1994	NEW	Secretary		AGENCY	Garth
15	Birdsaw	Angela	03/02/1994	NEW	Sr Accountant		SF AD	Garth
25	Carmella	Susie	03/23/1994	NEW	Secretary 1		EMPREF	Joe
21	Coleman	Eugene	03/16/1994	NEW	Assembler 1		UNSOL	Garth
5	Coward	Gary	01/19/1994	NEW	Programmer		AGENCY	Rip
19	Downes	Debbie	03/09/1994	NEW	Secretary 1		AD01	Joe
20	Edwards	Robert	03/09/1994	NEW	Vice Presiden		CMPINT	Rip
14	Harrington	Stuart	03/02/1994	NEW	Machinist 1		WALKIN	Joe
4	Ironi	William	01/12/1994	NEW	Programmer		AGENCY	Rip
27	Jones	Joesph	09/11/1994	NEW				
7	Kennedy	Harvey	02/02/1994	NEW	Technician		CMPINT	Rip
1	Keys	Mary	01/05/1994	INVITE	Programmer		AD01	Rip

Use the scroll bars and position the cursor on an applicant and press the Enter button on the keyboard to select that applicant.

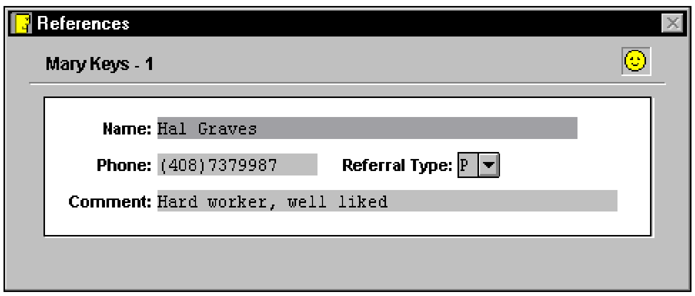
View Mode vs. Edit Mode

All applicant-related screens, such as Main Applicant, Education, Former Employers, References, Skills, Tests, and Training, are initially displayed in view mode. You cannot make any updates while you are in view mode. You can close the view mode of a screen and return to the Top Menu Bar and Applicant Assistant screen by clicking on the Close icon button in the Tool Bar or you can go to the edit mode.

You must be in edit mode to update any data elements. To get from the view mode to the edit mode of the current screen, use any one of the following three methods, whichever one you find most comfortable and efficient.



1. Click on the Edit icon button on the Tool Bar.
2. Pull down Commands from the Top Menu Bar and select Edit.
3. Use the keyboard shortcut, CTRL+E, to access the edit mode.



Once you are in edit mode, you will notice the editable data items on the screen are shaded. Press the Tab or Down arrow to move from field to field on the screen. The Up arrow will move you back to the previous item; the Left and Right arrows move your cursor within the selected field. You may also point and click on the field you wish to enter or change using the standard editing features. Click on the Save icon button to save your changes, or click on the Cancel icon button for any changes to be disregarded and the screen returned to the previous values. Password privileges must be set up through the Administrator menu to be able to add, change, or delete applicant information.

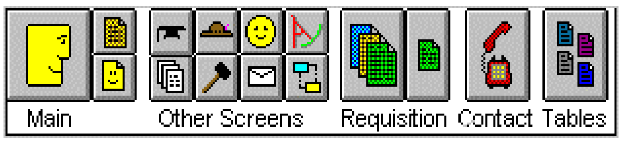
Adding, Editing, Deleting, and Browsing Records

The methods of adding a new record, editing or deleting an existing record, and browsing records are similar for all !Trak-It Applicant screens as discussed previously. Please refer to Chapter 5, *Top Menu Bar and Tool Bar*, for instructions. Further detailed direction will be presented for specific screens as necessary.

> **Note:** Do not delete applicants when a requisition is closed; archive applicants instead. If you delete applicants, then their data is gone and will not be included in EEO and other reports. Archiving the records puts the data into another set of databases that can be viewed and accessed for reports.

Screen Icons

The screen icons are on the left side of the Tool Bar. If a screen is displayed, you can click on any of the screen icon buttons on the Tool Bar to quickly select another screen. A corresponding screen icon is located in the upper-right corner of each screen to help you relate the screen icons on the Tool Bar to the specific screen. Note that the same icons are located on the Applicant Assistant screen for your convenience in accessing screens quickly.



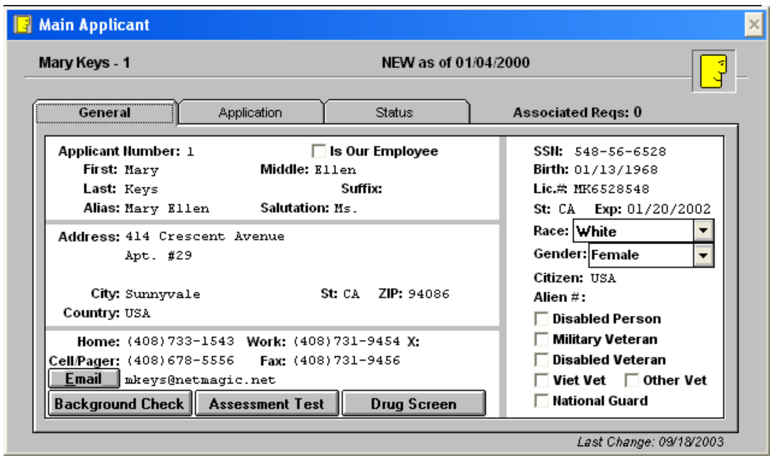
Main Applicant Screen

The Main Applicant screen contains an applicant's personal data. To access the Main Applicant screen, click on the Main icon button on the Applicant Assistant screen or pull down Screens on the Top Menu Bar and select Main Applicant or use the keyboard shortcut. You will be prompted for the applicant's Name or App # in the Find An Applicant screen.

The Main Applicant screen is made up of three tabs — General, Application, and Status. The data elements for each of the screens are described in the appendix, *Screen Data Elements*.

General Tab

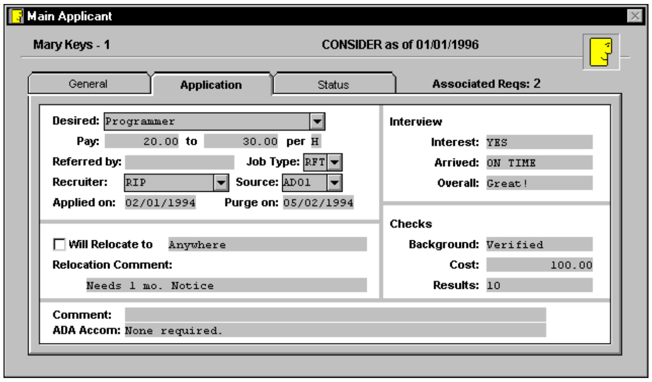
The General screen contains an applicant's personal data, such as name, address, phone numbers, SSN, license, EEO information, etc. You can enter as much of the information as you have available. You can always add more information at a later time.



Click on the Email button to send an email to this applicant. Click on the Background, Assessment Test or Drug Screen buttons to be automatically connected to the HireHelper.com web site with this applicant's data. (This, of course, requires an Internet connection and an account with HireHelper.com to pay for any requested background checks or tests.)

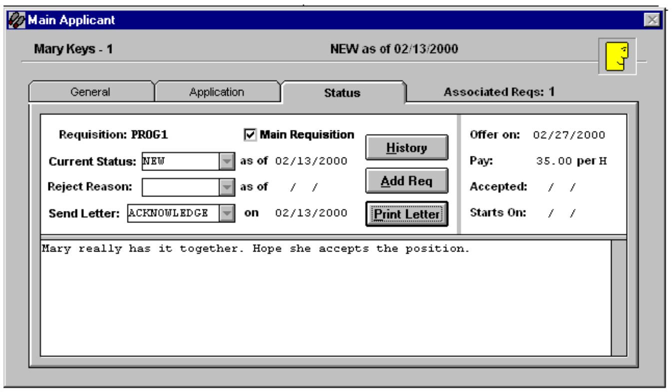
Application Tab

If you click on the Application tab you will be switched to a screen containing the applicant's desired position and pay, referral and recruiting information, relocation availability, American Disability Association accommodations, and comments. On the Application screen there are also six miscellaneous fields, which can be customized by you to meet your company's needs via the Administrator menu under Company Setup preferences tab.



Status Tab

The third screen available on the Main Applicant screen is the Status screen. The Status screen is where you relate the applicant to one or more Requisitions and track the letters and status relative to each Requisition. The Status screen contains information about the applicant's current status, the last letter sent, and position offered including pay, pay period, offer, and the accepted and start dates. This screen will also hold about seven typed pages of notes. See the appendix, *Screen Data Elements*, for a description of each data item on the Status screen.



From the Status screen you can assign a requisition to an applicant via the Add Req button, view the history of all requisitions assigned to the applicant with the History button and print or email correspondence via the Print letter button.

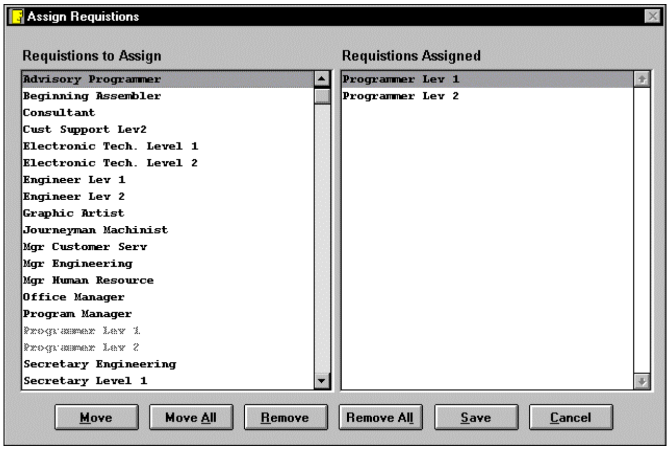
To change any item on the screen such as the Status of the applicant, click on the Edit button on the top tool bar and then click on the down arrow next to the Current status label. A list of your status designation will appear for you to choose from. Similarly, your or the applicant's reject reason can be recorded via the Reject reason drop down.

To send a customized letter or email to an applicant, select the letter or email to be sent from the drop down list in the Send Letter field. The letter you send will be recorded as being sent relative to the currently displayed requisition. If you select a letter such as a reject letter, you may wish to change the Status field at the same time. The letter can be printed or emailed immediately via the Print Letter button or it will just be queued to be batch printed later via the Generate Letter selection under Reports on the top menu bar.

If you would rather just generate labels, select the desired label from the drop down and batch generate the labels later.

Adding a Requisition

To add or assign a requisition to an applicant from the applicant's Status screen, click on the Add Req button located below the History button on the Status screen. The Assign Requisitions screen will be displayed.



Your list of open requisitions to assign appears in the scrolling list on the left. Select the requisition(s) of choice by double-clicking on your selection or highlighting a requisition then clicking on the Move button. Your choices will appear on the right side of the screen in the Requisitions Assigned list and be dimmed in the Requisitions to Assign list. Click on the Remove button if you need to remove a selected requisition from the selection list on the right. It will appear back in the choice list on the left. To remove all selections, simply click on the Remove All button. Click on the Save button to have your assigned requisition(s) applied to the applicant. You will return to the Status screen of the applicant with the newly assigned requisition status record. Click on the Close icon to return to the Top Menu Bar and Applicant Assistant screen.

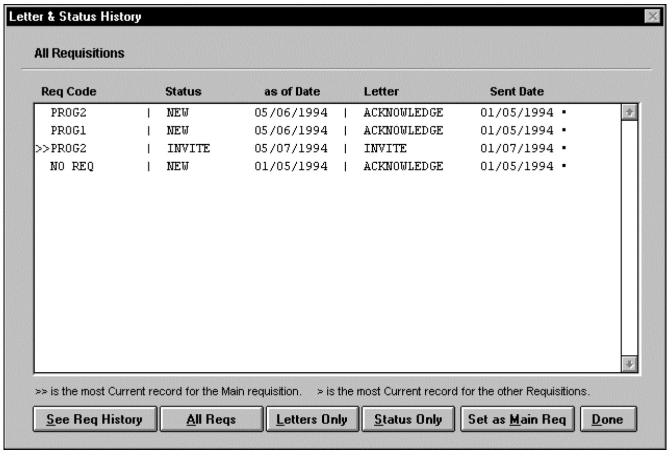
> **Hint:** You can also add a requisition to an applicant from the Requisition screen.

History

The history of the status changes; letters sent etc. of each individual requisition assigned to an applicant is maintained for you to view and update. To access a history record for a specific requisition as it pertains to the applicant, click on the History scroll icon. To access a previous history record for a requisition assigned to an applicant, click on the Up Arrow icon to the right of the History button. To access a later history record, click on the Down Arrow icon. When a letter is assigned to be sent to the applicant, a history record of the status record will be created.

Letter and Status History

To see the History of the Letters and Status of all assigned requisitions, click on the History button. The Letters & Status History screen will display a list of all the requisitions currently assigned to the applicant.



The most current record for the main requisition is preceded by two greater than signs (>>). The most current record for all other requisitions is preceded by a single greater than sign (>). You can view the History and Status of one specific requisition by selecting a requisition and clicking on the **See Req History** button or you can view all requisitions assigned to the applicant by clicking on the **All Reqs** button. You can also view only the history of all letters sent to the applicant by clicking on the **Letters Only** button or only the history of all status by clicking on the **Status Only** button.

When you make a change to the Status screen, such as change the Status or send a new letter to an applicant, a History Record is created. If only the Status was changed, then the new record will have (>) as the current record, the Status will have the new value, and the Status Date will be today. The other dates will be blank. If both the Status and Letter fields were changed, then both Status and Letter will have new values in the same history record and both will have today's date. The other dates will remain blank.

Setting Main Requisition

To set a requisition as a Main Requisition, select the record of choice and click on the **Set as Main Req** button. You can also set a requisition as the applicant's Main Requisition by clicking in the Main Requisition check box on the applicant's Status screen.

To Print a Letter or Email

Clicking on the Print Letter button causes the Print Report? Screen to appear.

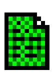
If the letter you want to send can be printed then the top three buttons will be available. To print an envelop chose the Print Envelop button. If you selected an email then the Email button will be available to immediately send the email. To generate all of the letters or emails that have not yet been sent select the Generate Letters and Emails option from the Reports menu.

Adding a New Applicant

To add a new applicant, click on the Add icon button or enter Ctrl+A from the Main Applicant screen or choose Add from the Commands menu. The Add a Main Applicant screen will display. Enter the new applicant's name. The applicant will be assigned the next sequential applicant number. !Trak-It Applicant will check for duplicates. When editing is completed, click on OK to access the Main Applicant screen where you can enter the remaining information for the new applicant or click on the Cancel button to return to the Top Menu Bar and Applicant Assistant screen without adding the new applicant. **HINT:** Using the automated Extract (Scan) option is much faster.

Applicant Related Screens

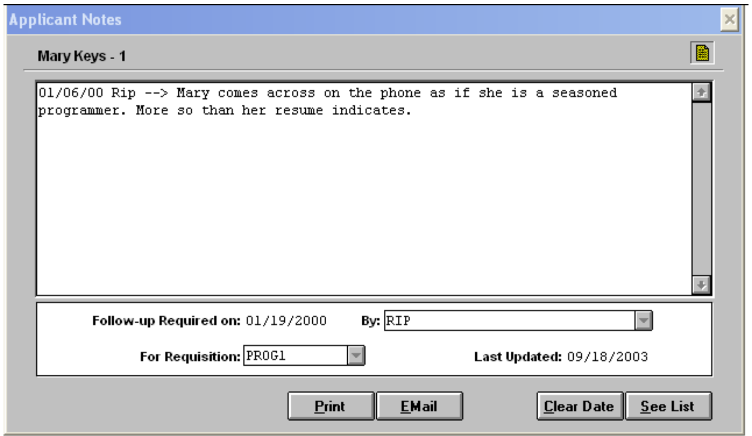
If a Main Applicant screen is displayed, choosing a related screen from the Screens menu or using the corresponding icon button in the Tool Bar displays the currently selected applicant's records for that screen. Choosing Education will go to that applicant's education records, etc. To get back to the Main Applicant screen from a related screen, click on the Main Applicant icon in the Tool Bar.



Applicant Notes*

Every applicant has an Applicant Notes screen available for you up enter free format text pertaining to the applicant. Each applicant can have an unlimited number of notes with each note being up to about 7 pages in length. To access the Applicant Notes screen, click on the Applicant Notes icon button on the Applicant Assistant screen, or pull down Screens on the Top Menu Bar and select Applicant Notes, or use the keyboard shortcut. If you are at an applicant screen, click on the

Applicant Notes icon on the Tool Bar to access the notes for the applicant. See the appendix, *Screen Data Elements*, for a description of each data item on the Status screen.



Enter any notes you want to store pertaining to the applicant. If any follow-up is required, enter the appropriate date and recruiter. If the note pertains to a specific requisition, enter the Requisition ID from the drop-down list. The updated date should be entered at the top right of the screen.

A standard report can be run to list any outstanding follow-up items. You can also email the note via the Email button.

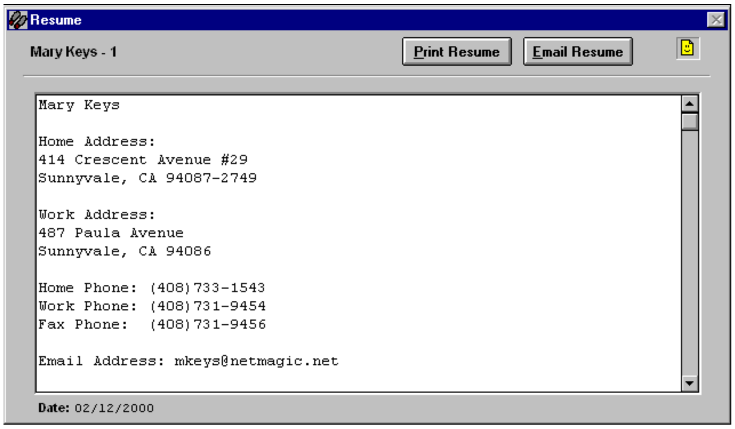
Follow-up Note Queue and Reminders*

By entering a date and a picking a name from the drop-down, you have set a trigger so that on the appointed day when the person list in the By: field logs into !Trak-It Applicant the Note Queue screen appears, reminding them to take action on this particular applicant. There is a similar function associated with the Requisition Note Screen, Invitations and Requisitions. The Clear Date button clears the date without going into edit mode and the See List button returns you to the Follow-up list.

Resume Screen

The Resume screen shows the text of an applicant's scanned resume. The !Trak-It Applicant Extract (Scan) option can access resumes stored in any directory on your computer or network and automatically add the resume to the resume database. See the chapter, *!Trak-It Extract (Scan)*, for further information on the Extract (Scan) option.

To access the Resume screen, click on the Resume icon button on the Applicant Assistant screen or pull down Screens on the Top Menu Bar and select Resume or use the keyboard shortcut. If you are at an applicant screen, click on the Resume icon button on the Tool Bar to display the Resume screen for that applicant.

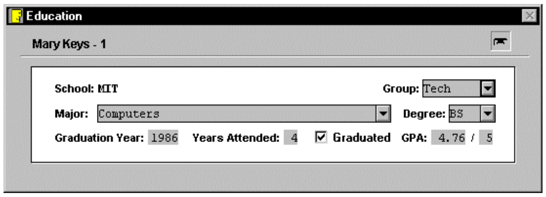


You can edit a resume by clicking on the Edit icon button on the Tool Bar and making any necessary changes. Editing may be necessary if the OCR software that created the resume *.txt* file had difficulty deciphering a character or word. This may happen with faxed resumes or resumes that are poor quality copies. After making any necessary changes, click on the Save icon button. Click on the Close icon button to return to the Applicant Assistant screen and Top Menu Bar or click on the Main Applicant icon to return to the Main Applicant screen.

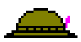
To print a copy of the Resume, click on the Print Resume button. To email it, click on the Email Resume button.

Education Screen

The Education screen contains information about the applicant's past education, schools attended, major, the year of graduation, years attended, degree, GPA and the GPA base. When you select Education, you are prompted for the applicant’s Name or App #, if an applicant has not already been selected. When the select window appears, click on the desired record and press Enter or simply double-click on the desired record.

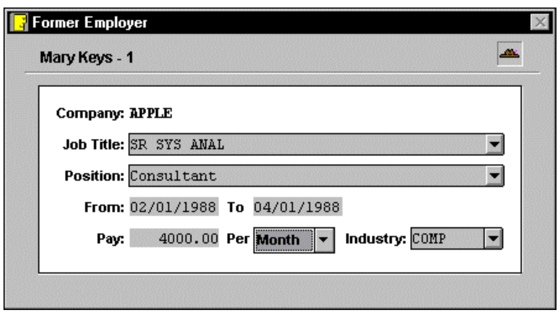


At this point, you can add, edit, delete, browse, or close the applicant’s Education records or find another applicant’s Education records.



Former Employer Screen

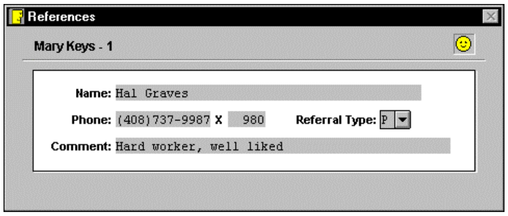
The Former Employer screen can be used to track former employment information. Data includes name of company, job title, position, employment dates, salary, pay period, and industry code. When you select Former Employer, you are prompted for the applicant’s Name or App # if an applicant has not already been selected. When the select window appears, click on the desired record and press Enter or simply double-click on the desired record.



At this point, you can add, edit, delete, browse, or close the applicant’s Former Employee records or find another applicant’s Former Employee records.

References Screen*

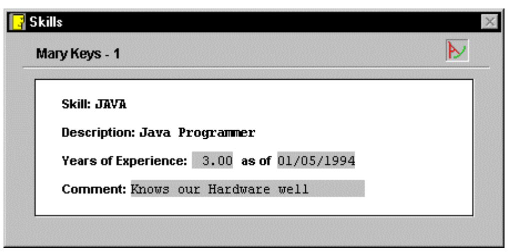
The References screen is used to enter the applicant's references. The data includes the name of the reference, phone number, extension, referral type, and comment. When you select References, you are prompted for the applicant's Name or App # if an applicant has not already been selected. If a select window appears, double-click on the desired record.



Once accessed, you can add, edit, delete, browse, or close the applicant's References records or find another applicant's References records.

Skills Screen

The Skills screen is used to enter the applicant's skills. The data includes the skill, years of experience, starting date of skill, and comment. When you select Skills, you are prompted for the applicant's Name or App # if an applicant has not already been selected. If a select window appears, double-click on the desired record.



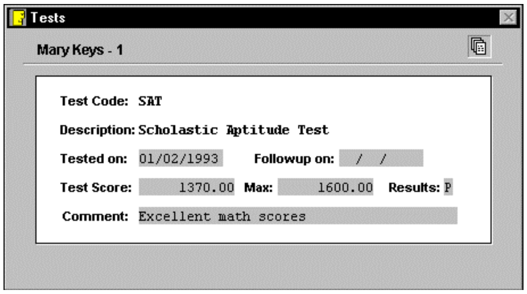
All skills and skill descriptions are from the Skills Code Table.

To more specifically assign the skill level of an applicant, you can define several skills, one for each level of experience. For instance, in the Skills Code Table set up C++ Programmer <1 to indicate the applicant has less than 1 year of experience; C++ Programmer <2 to indicate less than 2 years of experience, etc.

With the skill displayed, you can add, edit, delete, browse, or close the applicant's Skill records or find another applicant's Skill records.

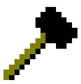
Tests Screen*

The Tests screen is used to enter the applicant's standard tests. The data includes the test code, description, test date, follow-up date, score, results and comment. When you select Tests, you are prompted for the applicant's Name or App # if an applicant has not already been selected. If a select window appears, double-click on the desired record. Also, review the How to Disable/Enable Code Validations section in the chapter, *Understanding Code Tables,* of this manual.



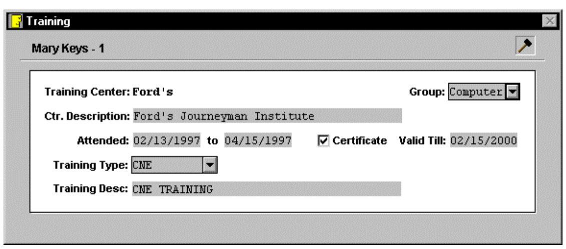
If validation of Tests is enabled, all test codes and descriptions are selected from the Tests Code Table.

You can add, edit, delete, browse, or close the applicant's Test records or find another applicant's Test records.

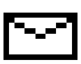


Training Screen*

The Training screen is used to enter the applicant's specialized training. The data includes the training center name and description, training group, training start and end date, certification validation date, and training code and description. When you select Training, you are prompted for the applicant's Name or App # if an applicant has not already been selected. If a select window appears, double-click on the desired record.

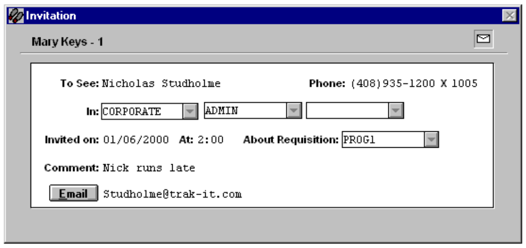


Since the record is displayed, you can add, edit, delete, browse, or close the applicant's Training records or find another applicant's Training records.



Invitations Screen*

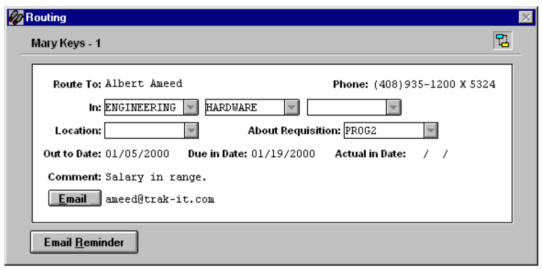
The Invitations screen is used to enter the applicant's invitations to scheduled interviews. The data includes the interviewer's name and phone number, organization, email, meeting place, and date and time. The related requisition ID and comment are also available. When you select Invitations, you are prompted for the applicant's Name or App # if an applicant has not already been selected. If a select window appears, double-click on the desired record.



To email a reminder to the interviewer about this appointment, click on the Email button and after the message appears in the Email message window click on the Send button.

Routing Screen*

The Routing screen is used to keep track of the routing status for an applicant's application or resume. The data includes the name and phone number of the person to whom the resume is being routed, organization levels, location, requisition ID, pertinent dates and comment. When you select Routing, you are prompted for the applicant's Name or App # if an applicant has not already been selected. If a select window appears, double-click on the desired record.



To route this applicant's resume to a person, click on the Email button and after the message appears in the Email message window click on the Send button. If you have not heard back by the Due in Date, click on the Email reminder button to automatically send a reminder.

Requisitions Screen

Requisitions and Requisition Notes are discussed in the previous chapter, *Requisitions.*

Contacts Screen*

Contacts are discussed in the chapter, *Contacts.*

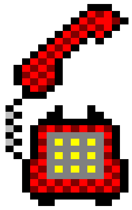
Code Tables

Code Tables are discussed in the chapter, *Understanding Code Tables*.

Initializing Applicant Data

Initial data loading involves first setting up the Code Tables, adding your open Requisitions, then entering each applicant's personal data, education, former employers, skills, tests and training data. At an extra cost, the !Trak-It Extract (Scan) option is available to quickly load data from existing resumes. See the chapter, *!Trak-It Extract (Scan)*, for further information. You can also download applications from your web site using the extra cost option, !Trak-It Web Interface, and then use the scan option to populate the Applicant databases. See the chapter, *Web Interface*, for further information. After the initial loading of data, you can update any applicant information.

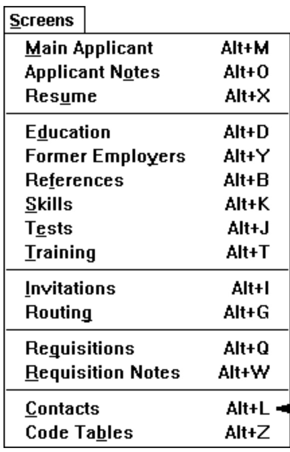
> **Important:** You must set up your Code Tables and enter Requisitions before entering applicant data. See Chapter 4, *Understanding Code Tables,* and Chapter 6, *Requisitions,* for instructions. If you start entering applicant data before you set up your tables, !Trak-It Applicant will force you to enter a blank or invalid code for all validated fields. If you start entering applicant data before your open requisitions are entered, you will not be able to assign requisitions to applicants at the time of entering applicant records.



Chapter 8
Contacts*

Every recruiter has many people to contact in order to successfully process applications and company requisitions. Recruiting personnel, newspapers, employers, moving companies, and travel agencies are among the contacts HR communicates with frequently. The Contacts screen allows you to have easy access to view, add and change contact information. You can quickly find the phone number, address, and other information about your helpful contacts if you enter pertinent information into your !Trak-It Applicant database. It is an efficient reference tool designed to help you process your company's applications. The data elements for the Contacts screen are described in the appendix, *Screen Data Elements*.

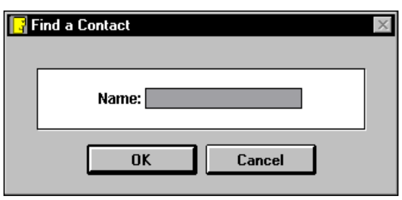
To access the Contacts screen, pull down the Screens menu and select Contacts or click on the Contacts icon button on the Applicant Assistant screen.



Screens Menu

Applicant Assistant Screen

When you select Contacts, the Find a Contact screen is displayed.

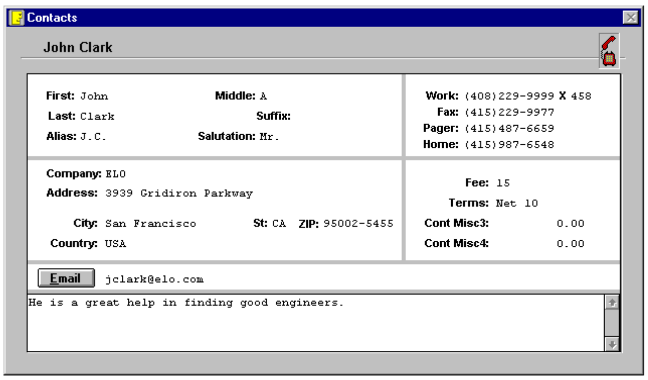


Enter the contact's last name or the start of the last name and click on the OK button. Click on the Cancel button if you want to return to the Top Menu Bar and Applicant Assistant screen.

If the name is not found, a listing of contacts is displayed with the contact closest to your selection highlighted. Entering the first character of the last name will quickly bring the cursor to the first applicant record that starts with that character.

Last Name	First Name	Company	City	State	Work Phone
Clark	John	ELO	San Francisco	CA	(408)229-9999
Clark	Clarence	Kelly Services	San Jose	CA	(408)935-1200
Hall	George	DRI	San Mateo	CA	(415)674-2222
Nelson	Paul	ELO	San Francisco	CA	(408)229-9999
Samir	Sally	Space Systems	San Jose	CA	(408)935-1750
Sinclear	Paula	ELO	San Francisco	CA	(415)229-9999
Smith	Connie	DVI International	Danville	CA	(510)665-4489
Studholme	Sam	DRI	San Mateo	CA	(415)674-2222
Vidlock	Joseph	DMTA Research	Concord	CA	(510)556-6026
White	Warren	GTT	Cupertino	CA	(408)775-1255

Double click on the desired person's name or use the scroll bar to position the cursor on a contact then press the Enter button to select that contact. The Contact screen for your selection is displayed.



There are four miscellaneous fields on the right section which can be customized for your company's use. You may want to use one of the four miscellaneous fields to enter a fee charged by the contact for services provided or indicate the area of specialty. The titles for these fields can be customized via the Administrator menu under the Company Setup Preferences tab.

The note field at the bottom allows you to enter several pages of comments.

To send an email message to this contact, click on the Email button next to their email address.

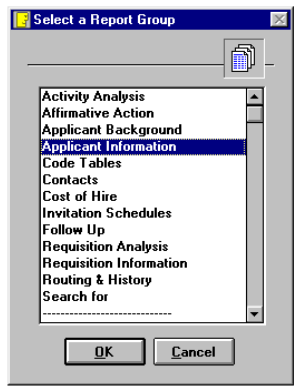
The method of adding a new contact record, editing or deleting an existing record, and browsing records are similar for all !Trak-It Applicant screens as discussed previously. Please refer to Chapter 5, *Top Menu Bar and Tool Bar,* for information.

Chapter 9
Selecting and Printing Reports

This chapter describes how to select and print standard !Trak-It Applicant reports and also how to customize standard reports. !Trak-It Applicant provides numerous standard reports with sorting and selecting features. See Appendix Standard Reports for a listing of the standard reports. Details on how to design custom reports from scratch are provided in the separate manual, *!Trak-It Reports*.

Standard Reports

Pull down Reports from the Top Menu Bar or click on the Reports icon on the Applicant Assistant screen. Select the desired report. In this example, we selected Applicant Information.

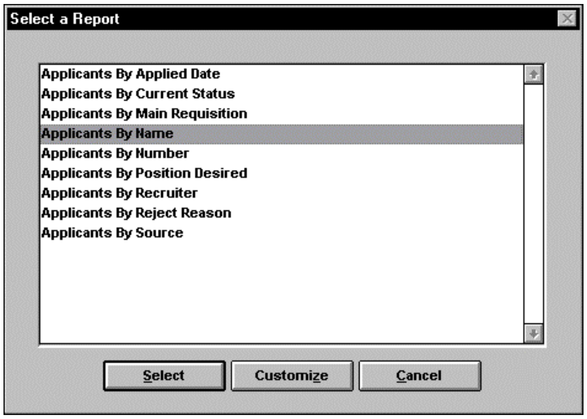


The reports available for selection are listed in the Select a Report window. This list will be different for each category selected. Click on a report and then click on the Select button. The Customize button is discussed later in this chapter. The Cancel button returns you to the Top Menu Bar. Reports require information from the various databases. If no data is present, no report will be generated. For example, an Applicant Information report cannot be created until you first create the records on the APERSNL database that Applicant Information reports display.

Generating a standard report is a 3-step process:

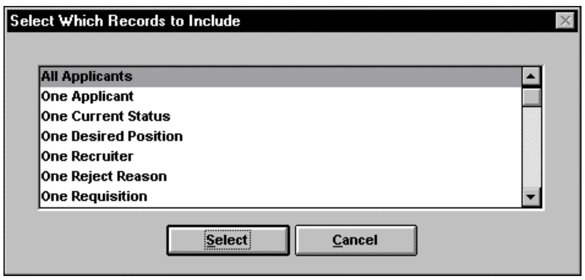
1. Select the report.
2. Specify the selection criteria of which applicant's data is to be displayed.
3. Select the output destination.

Step 1: Select a Report



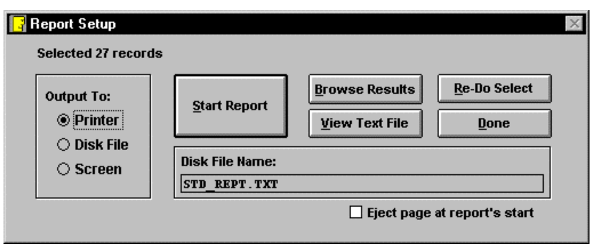
When you click on the Select button the following screen is displayed.

Step 2: Specify Selection Criteria



Click on a selection that you would like to include in your report. This list will be different for each report selected. Click on the Select button to display the Report Setup screen.

Step 3: Select the Output Destination

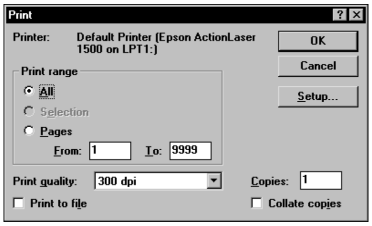


Select an output destination and then click on the Start Report button.

Output To:

Printer

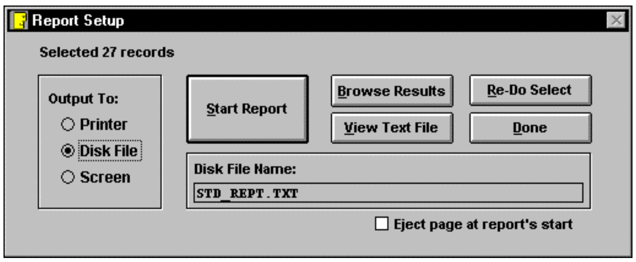
When you click on the Printer radio button and then click on the Start Report button, the standard print dialogue box appears.



Click on the OK button to print your report. When your report has been printed, the Report Setup screen is re-displayed. Click on the Done button to return to the Applicant Assistant screen.

Disk File

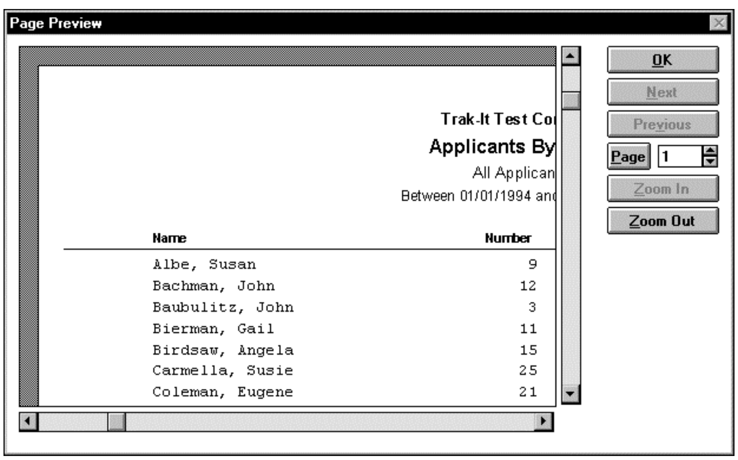
Click on the Disk File button and then click on the Start Report button to produce a disk file to the file specified in the Disk File Name, which defaults to STD_REPT.TXT. If you are connected to a laser printer, this will produce a Postscript file unless you install a print driver that creates a simple text file.



Click on the Done button to return to the Applicant Assistant screen.

Screen

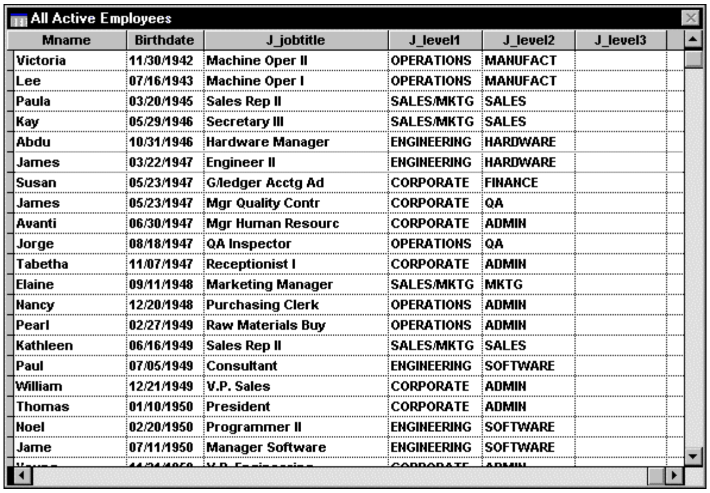
You can also output the report to a screen to preview the report prior to printing. Click on the Screen radio button on the Report Setup screen to view your report.



You can zoom in to enlarge the screen and go to the next or previous page of the report. You can also type the page number that you would like to preview and then click on the Page button. When you are finished reviewing the results, click the OK button to return to the Report Setup screen.

Browse Results

Click on the Browse Results button of the Report Setup screen to view the data in a spreadsheet format

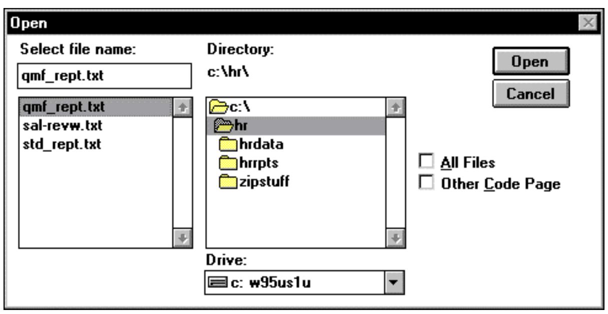

All Active Employees

Mname	Birthdate	J_jobtitle	J_level1	J_level2	J_level3
Victoria	11/30/1942	Machine Oper II	OPERATIONS	MANUFACT	
Lee	07/16/1943	Machine Oper I	OPERATIONS	MANUFACT	
Paula	03/20/1945	Sales Rep II	SALES/MKTG	SALES	
Kay	05/29/1946	Secretary III	SALES/MKTG	SALES	
Abdu	10/31/1946	Hardware Manager	ENGINEERING	HARDWARE	
James	03/22/1947	Engineer II	ENGINEERING	HARDWARE	
Susan	05/23/1947	G/ledger Acctg Ad	CORPORATE	FINANCE	
James	05/23/1947	Mgr Quality Contr	CORPORATE	QA	
Avanti	06/30/1947	Mgr Human Resourc	CORPORATE	ADMIN	
Jorge	08/18/1947	QA Inspector	OPERATIONS	QA	
Tabetha	11/07/1947	Receptionist I	CORPORATE	ADMIN	
Elaine	09/11/1948	Marketing Manager	SALES/MKTG	MKTG	
Nancy	12/20/1948	Purchasing Clerk	OPERATIONS	ADMIN	
Pearl	02/27/1949	Raw Materials Buy	OPERATIONS	ADMIN	
Kathleen	06/16/1949	Sales Rep II	SALES/MKTG	SALES	
Paul	07/05/1949	Consultant	ENGINEERING	SOFTWARE	
William	12/21/1949	V.P. Sales	CORPORATE	ADMIN	
Thomas	01/10/1950	President	CORPORATE	ADMIN	
Noel	02/20/1950	Programmer II	ENGINEERING	SOFTWARE	
Jame	07/11/1950	Manager Software	ENGINEERING	SOFTWARE	

Press Escape to return to the Report Setup screen when done browsing.

View Text File

Click on the View Text File on the Report Setup screen to access the report that was written to a disk file.



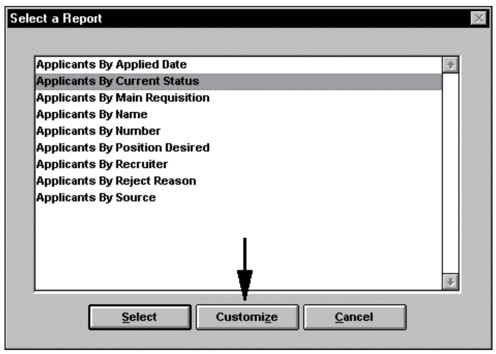
Select the report to be previewed and click on Open to view the report.

Customize a Standard Report

Sometimes a standard report is not exactly what you want. You can create a report from scratch or customize an existing standard report. Maybe an existing report needs another field or has too many fields or maybe you would like a different font or size. Selecting the standard report that is close to what you want and then selecting the Customize button can easily do all of this customization. Start by selecting the Applicant Information group from the Reports Menu.

To select a particular report, click on a report name and then click on the Customize button. In this example, select Applicant Information… from the Reports menu.

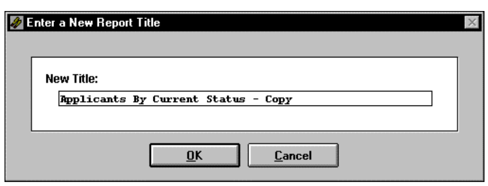
Select Applicants by Current Status from the Select a Report screen.



The selection criteria for this standard report will be changed. We want the report to display only those applicants whose Current Status is OFFER.

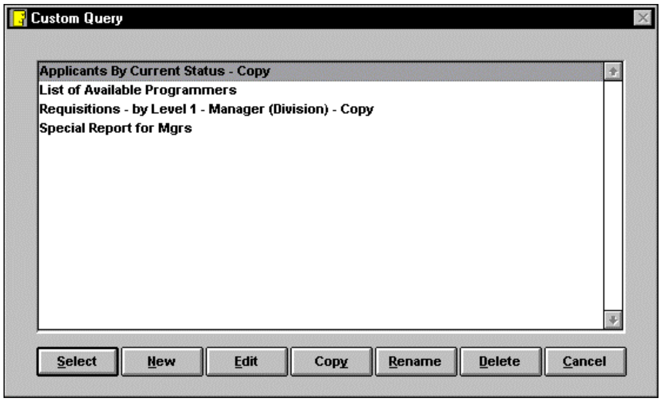
The following discussion is a brief overview of the Customize feature. Refer to the separate manual, *!Trak-It Report,* for more information on designing custom reports from scratch and customizing standard reports.

Click on the Customize button, the Enter a New Report Title screen is displayed.

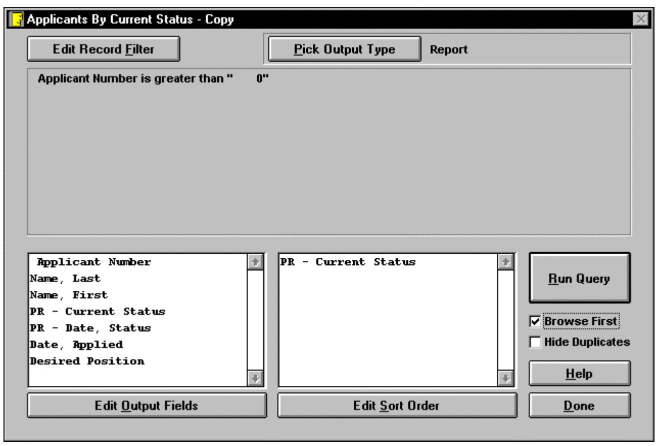


Enter a new report title and Click on the OK button to continue customizing a standard report.

A listing of your custom queries appears. Custom queries are different from standard reports in that a custom query contains both the layout of the report and the report selection criteria, so we refer to it as a query instead of a custom report for clarity.



Click on the custom query to be modified, then click on the Select button. The Main Query setup screen is displayed.

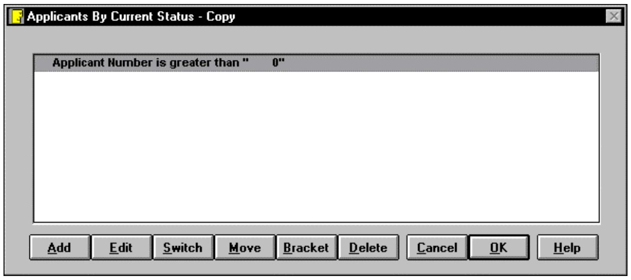


There are five categories of items that you can modify:

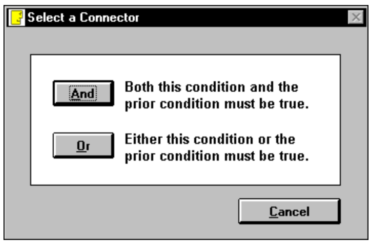
You can click on the....	If you want to....
Edit Record Filter	change the selection of records to display
Pick Type of Output	choose a specific file layout, i.e. Excel spread sheet
Edit Output Fields	change or add fields on the report
Edit Sort Order	change how the report is sorted
Run Query	start your custom report

Edit Record Filter

When you click on the Edit Record Filter, the following appears.

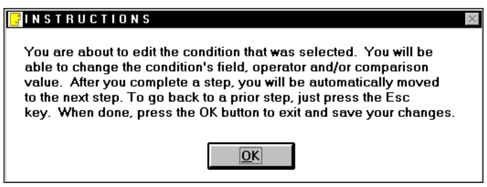


If you click on Add, the Select a Connector screen will appear.



Click on the And button if you want the new and prior conditions both to be true. If only one condition needs to be met, click on the Or button.

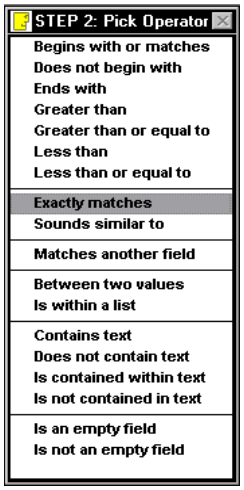
In this example, we are going to Edit the current condition so click on the Edit button to change the condition. The following Instructions screen only appears the first time you choose Edit during a session.



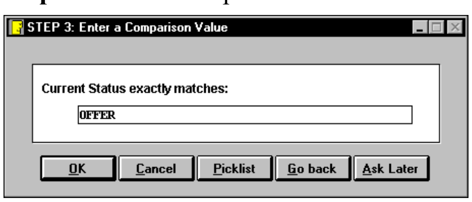
Click on the OK button after reading the instructions. In the next 3 screens, you will select the field, operator, and value of the selection criteria to be used.

Step 1: Pick a Field from the display of fields available as selection criteria. Use the scroll bar to view the list of available fields. Double-click on the field you want to use as selection criteria. We chose the Current Status field.

Step 2: Pick the Operator screen is displayed. We selected Exactly Matches.

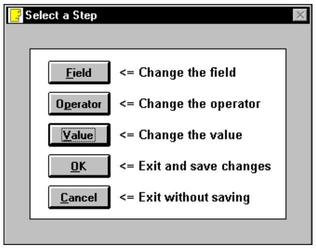


Step 3: Enter a Comparison Value. We chose OFFER and clicked on the OK button.

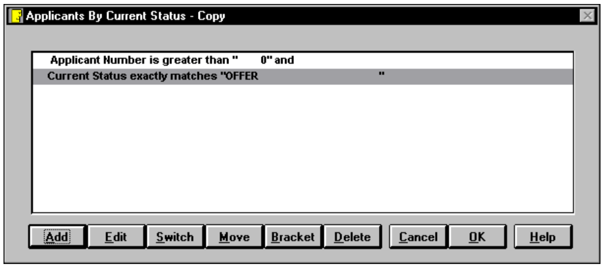


In this example we entered OFFER because we wanted to select all applicants whose Current Status exactly matches OFFER. We could also have clicked on the Picklist button to display a list of Status Codes from the Code Tables or clicked on the Ask Later button if we wanted to enter the comparison value each time we ran the query.

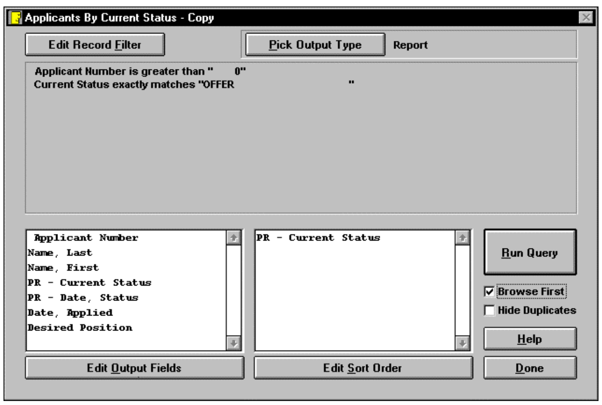
Step 4: Click on OK to save our changes, or Cancel if we change our mind. Or we can make another selection to return to any of the previous steps.



Step 5: Click the OK button and the following screen with the completed record filter is displayed.



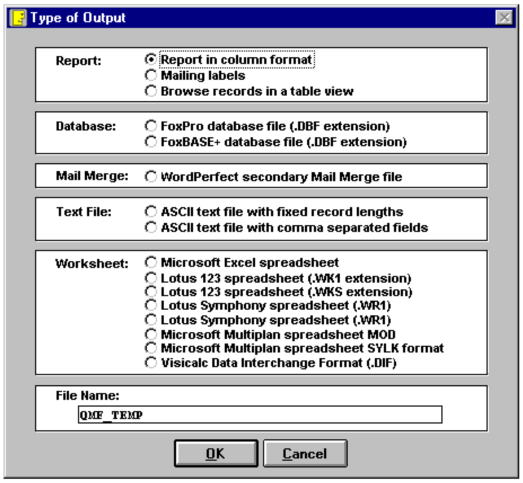
Step 6: Click the OK button to save changes and return to the Main Query screen.



The four options on the Main Query screen described next in this chapter are Pick Output Type, Edit Output Fields, Edit Sort Order and Run Query.

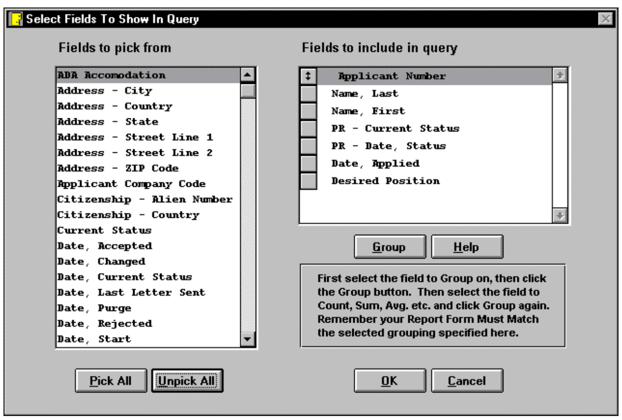
Pick Output Type

Click on the Pick Output Type button on the Main Query screen to select the type of output. If you do not select a type of output, the default is to display your report in a column format. This type of output selection is typically selected when you would like to output your report to a spreadsheet or a word processing program in a particular format.



Edit Output Fields

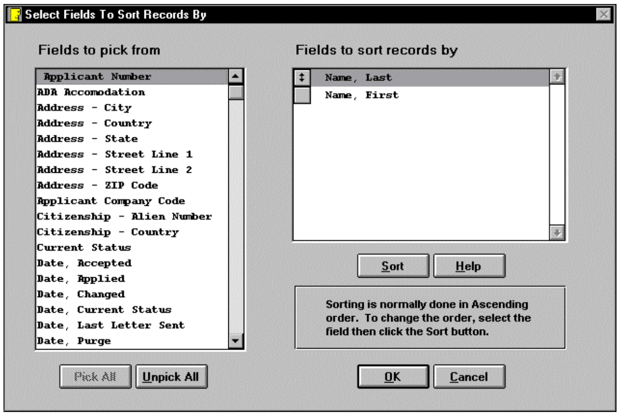
Click on the Edit Output Fields in the Main Query screen to modify the fields displayed in your report. Follow the directions on the screen. Click on the OK button to save your changes and return to the Main Query screen.



Follow the instructions on the screen to select the fields.

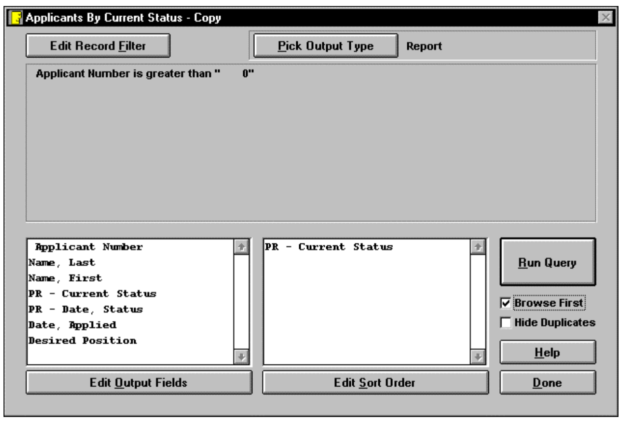
Edit Sort Order

Click on the Edit Sort Order button on the Main Query screen to change the sorted order of your report. Follow the directions on the screen to change the order. Click on the OK button to save your changes and return to the Main Query screen.

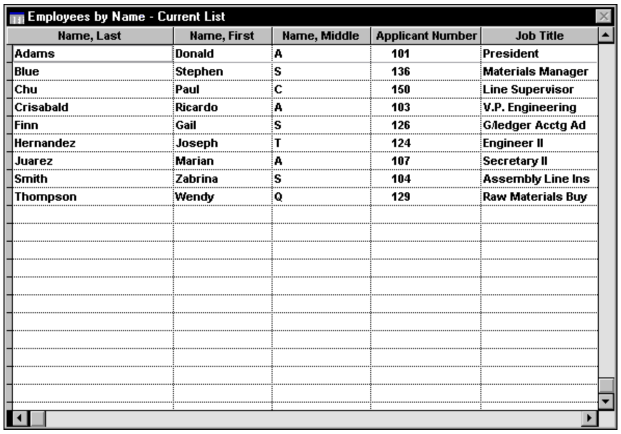


Run Query

Click on the Run Query button on the Main Query screen to produce your report.

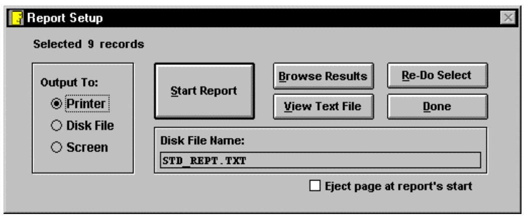


If you have a check mark in the Browse first box on the Main Query screen, the report will be displayed in a Browse window.

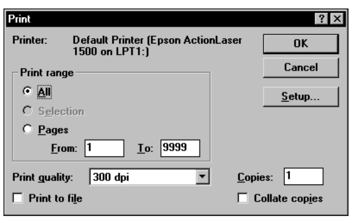

Employees by Name - Current List

Name, Last	Name, First	Name, Middle	Applicant Number	Job Title
Adams	Donald	A	101	President
Blue	Stephen	S	136	Materials Manager
Chu	Paul	C	150	Line Supervisor
Crisabald	Ricardo	A	103	V.P. Engineering
Finn	Gail	S	126	G/ledger Acctg Ad
Hernandez	Joseph	T	124	Engineer II
Juarez	Marian	A	107	Secretary II
Smith	Zabrina	S	104	Assembly Line Ins
Thompson	Wendy	Q	129	Raw Materials Buy

Click on the Close box in the upper-right corner to remove the Browse window. The following Report Setup screen is displayed.

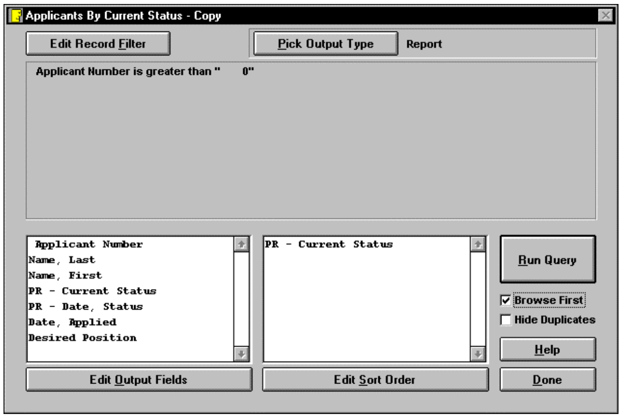


Click on one of the radio buttons to output the report to the printer, disk file or the screen. The other selections were discussed earlier in this chapter under Standard Reports. The Edit Form button is discussed thoroughly in the manual, *!Trak-It Report.* Click on Start Report to output the report. If you have selected to output the report to the printer, the following is displayed.



Click on the OK button to print your report.

When the report has been printed, the following Main Query screen is re-displayed.

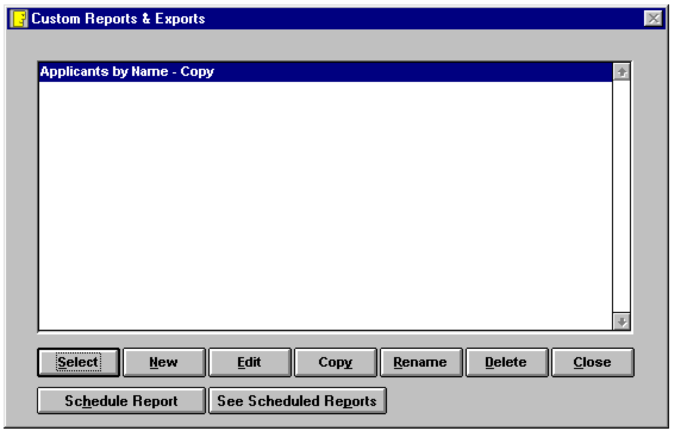


Click on the Done button to return to the Top Menu Bar and Applicant Assistant screen.

Creating a New Report

Designing your own report from scratch is not difficult once you are familiar with customizing standard reports. Pull down the Reports menu and select the Custom Queries option.

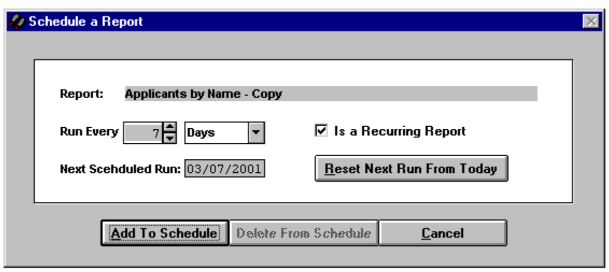
A listing of your previous Custom Queries & Reports is displayed.



Click on the New button. Refer to Chapter 2 of the *!Trak-It Report* tutorial for further instructions.

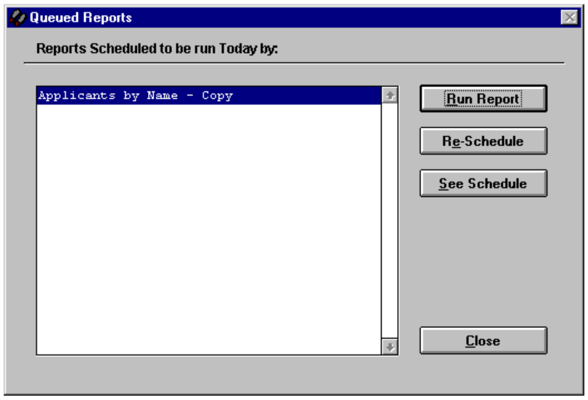
Scheduling Custom Reports

To schedule a custom report, select the report to be scheduled by selecting it on the Custom Reports and Exports screen then clicking on the Schedule Report button. The Schedule a Report screen appears.

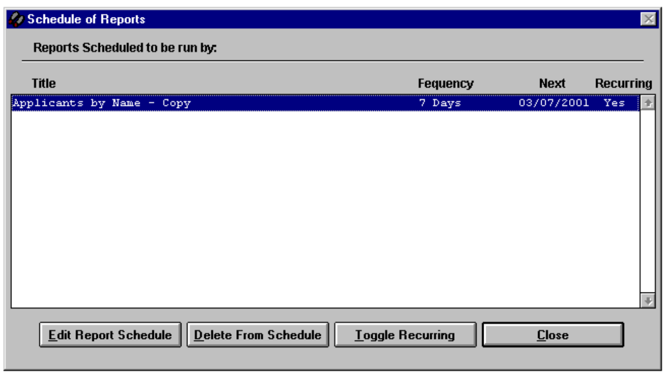


You can now set the schedule for the selected report. If it is a recurring report then the check box should have a check mark (the default). Using the drop down and counter fields specify how often you want the report to be run and when you want the schedule to start. The default is to start from today. If at some later time you wish to modify the schedule, the Reset Next Run From Today is a handy way to get today's date set into the Next Scheduled Run field.

On the scheduled date after you log in and review any Queued Notes, you will be notified of all the reports that you have scheduled to be run today as well as any that were scheduled for previous days and have not as yet been run.



Click on the Run Report button to run the selected custom report. Click on the Re-Schedule button to access the Schedule a Report screen to set the new schedule. Click on the See Schedule button to access the current list of all scheduled reports. Click on the Close button to do nothing. The Queued Report screen can be accessed at any time via selecting the Reports Scheduled… item under Reports on the Top Menu Bar or from the Select a Report Group screen.



The Schedule of Reports screen appears by selecting the Re-Schedule button on either the previously shown Queued Report screen or via clicking the See Scheduled Reports button on the bottom of the Custom Reports and Exports screen. Selecting the Edit Report schedule causes the Schedule a report screen to appear for you to re-specify the report schedule. To remove a report from the schedule, select the report and click, on the Delete From Schedule button. The Toggle Recurring button allows you to easily change a recurring report schedule to a run one-time schedule and visa versa. Click on the Close button to return to the previous screen or the Applicant Assistant screen.

Chapter 10
Utilities and Administrator

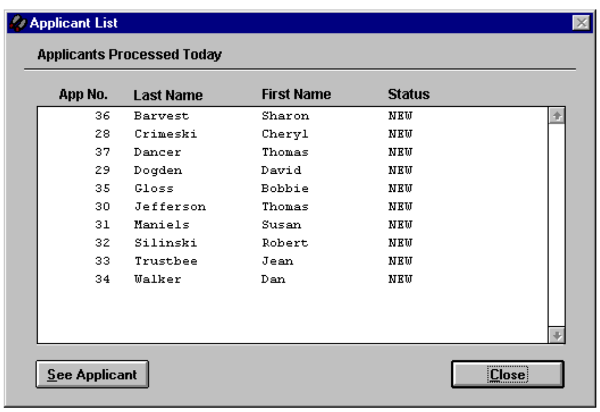
This chapter discusses the Utilities and Administrator selections on the Top Menu Bar.

Utilities Menu

The Utilities menu contains selections for handling special situations in !Trak-It Applicant. To view the Utilities menu, select Utilities from the Top Menu Bar. You can use the Utilities menu to change your password, change an applicant number, do mass updates, archive or delete applicant data, retrieve archived applicants, transfer applicants to !Trak-It HR, or add an employee as an applicant. Any unavailable options will be dimmed. Privileges for some of the options in the Utilities menu are established via the User Security Setup in the Administrator menu.

Status Change Queue

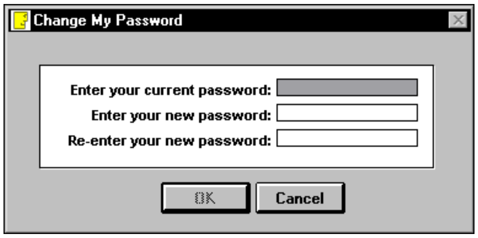
Choose Status Change Queue from the Utilities menu to display a list of all applicants whose status was changed today.



This screen will also automatically be displayed after a batch of applicants have been scanned into the system via the one step Scan option. To access a particular applicant simply double-click on the applicant's name and their Main screen will be displayed. Click the Close button to return to the Applicant Assistant screen without choosing an applicant to view.

Change My Password

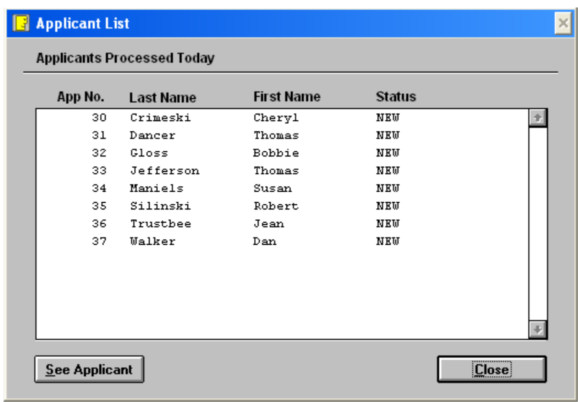
Choose Change My Password from the Utilities menu to change your own password.



If you do not enter the valid current password, you will be exited from !Trak-It Applicant. This is a security measure to prevent someone from changing your password when you are away from your desk and !Trak-It Applicant is active on your computer.

Leave the Change Password screen by choosing the OK button to save your new password or the Cancel button if you do not want to save the changes. When you next use !Trak-It Applicant and enter a password on the Startup screen, what you type will be masked to protect the confidentiality of your password.

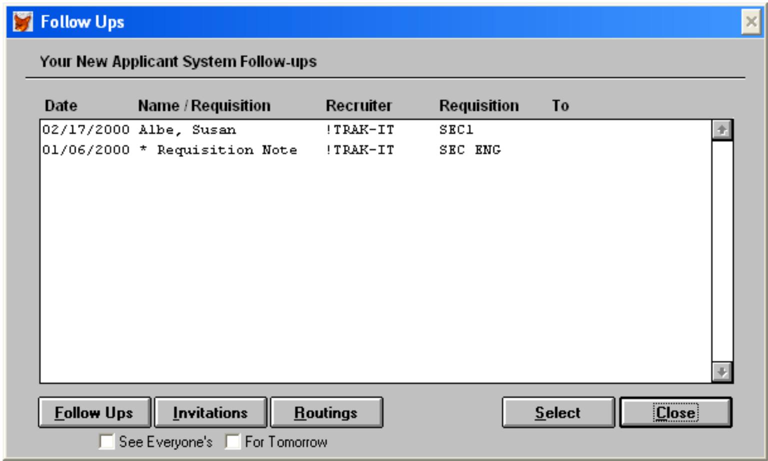
Status Change Queue



The Status Change Queue is a clickable list of all applicants that have either been entered today or have had their status changed today. This is a handy way to get a list of new applicants after you process a batch of resumes.

Pending Follow-Up Notes *

Selecting Pending Follow-Up Notes causes the Notes to Follow-Up screen to appear. Double-clicking on a note item takes you to that applicant's note or requisition note for your action. This selection accesses the same screen that appears immediately after you log in, reminding you of your pending follow-ups.



Mass Update Any Field

The Mass Update Any Field utility will change any field in all the related !Trak-It Applicant database files and will reform the corresponding index files. After choosing Mass Update Any Field from the Utilities menu, the following alert is displayed.

Warning: It is advisable to always backup your data before using this utility. If you have not backed up your data, click on the Stop button. Pull down the Administrator menu and select Backup Data to Sub Folder before using this utility.

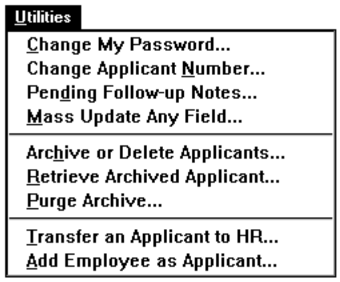
Click on the Continue button to continue using this utility or the Stop button to return to the Top Menu Bar and Applicant Assistant screen.

The Select the Database screen will display the list of databases. Double-click on the database to be updated. When you select the database to be updated, an alphabetical listing of the fields in the selected database is displayed. Refer to the appendix, *Data Dictionary,* for a description and structure for the data fields on each database.

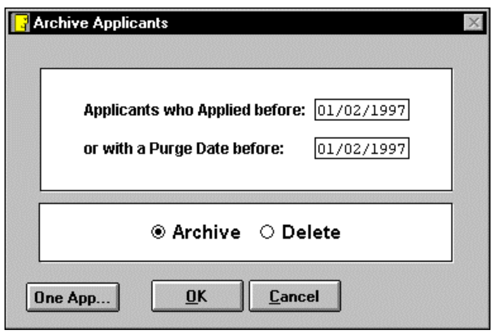
Archive or Delete Applicants*

The Archive or Delete Applicants utility allows the option of archiving or deleting applicant data from your active database to an archive database or erasing the data completely from your files. Removing unnecessary data from your database will speed up your searches and reports. You can still view archived applicant records and run reports by changing the data you are accessing via the Change Data To option on the File menu.

To archive or delete applicants, pull down the Utilities and choose the Archive or Delete Applicants option.



The Archive Applicant screen will be displayed prompting you for the date on which to base the archive or deletion.



If you click on the Archive option radio button, it will remove applicants from the active files and save all related data into archive files. If you choose the Delete option, it will delete all applicant information from the databases for the indicated applicants.

Enter a date on the Archive Applicants screen based on whether to purge or delete by the applicant's application or purge date. An applicant's application and purge dates are entered on the Application tab of the Main Applicant screen. Click on the appropriate radio button of your choice to delete or archive the applicant information. !Trak-It Applicant will remove all applicants whose purge date falls before the date you specify.

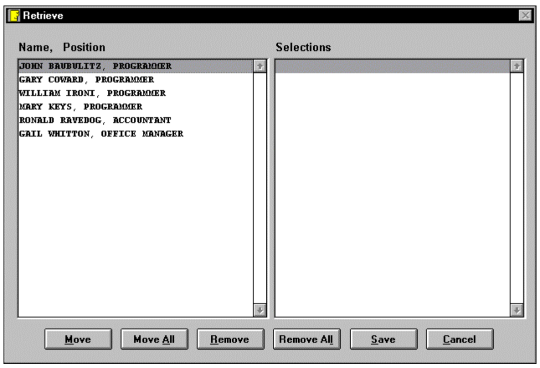
You can also select one applicant to be purged or deleted by clicking on the One Applicant button. The Find an Applicant screen will appear for you to identify the applicant to be archived or deleted.

> **Note:** If you have an applicant that you do not want to delete, change the applicant's purge date on the Application tab of the Main Applicant screen to a later date than the date that you wish to purge applicants. When you purge applicants, that applicant will not be removed.

As a general rule, you should archive at the end of each year after processing annual reports. You probably don't want to keep them "on-line" for more than the year they were actually active because their data takes up disk space. The applicant records which have been archived will be deleted from the active database but can be restored from the archive database to the active database using the Retrieve Archived Applicant on the Utilities menu.

Retrieve an Archived Applicant*

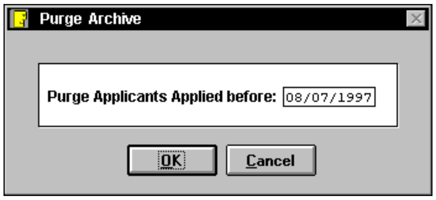
If it becomes necessary to retrieve an archived applicant, choose Retrieve Archived Applicant from the Utilities menu. The Retrieve screen will display the applicants with their desired positions.



Double-click on the applicants listed on the left side of the screen to be retrieved or highlight the applicant to be retrieved and click on the Move button. You can retrieve all archived applicants by clicking on the Move All button. The applicant names will then appear on the Selections side of the Retrieve screen. Click on the Save button to begin the retrieval. Click on the Cancel button to return to the Top Menu Bar and Applicant Assistant screen without retrieving archived applicant records.

Purge Archive*

The applicant information in the archive databases can be purged using the Purge Archive utility on the Utilities menu. The Purge Archive screen will prompt you for the applied date by which to purge all archived applicant information. All applicants whose applied date is before the date entered will be purged.



Enter the applied date desired and all archived records with an applied date before the date entered will be deleted or purged from the archive database.

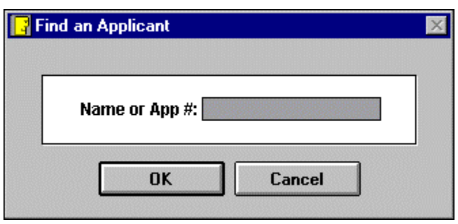
Transfer Applicant to HR

The Transfer Applicant to HR utility moves relevant applicant data from !Trak-It Applicant to the !Trak-It HR system. Much of the data that you have entered into !Trak-It Applicant will be transferred to the !Trak-It HR personnel, skills, former employer, and education databases. The data will include name, address, EEO information, and phone numbers, as well as skills, former employers, and education data.

Selecting the Transfer Applicant to HR option causes !Trak-It Applicant to automatically try to find the appropriate HR directory on your disk. If it can’t find the correct directory, the open dialog box will display a list of files for you to select the HR database

Find and open the hpersnl database in !Trak-It HR. When you have found hpersnl database select it, then choose the Open button to continue the Transfer Applicant process or choose the Cancel button to return to the Top Menu Bar and Applicant Assistant screen without affecting your data.

When !Trak-It Applicant has opened the hpersnl database, you will be prompted to select the applicant you've hired, whose data you wish to move.



Use the Find an Applicant screen to select the applicant. Enter the last name or applicant number of the applicant. Choose the OK button to make the selection. Choose the Cancel button to return to the Top Menu Bar without affecting your data.

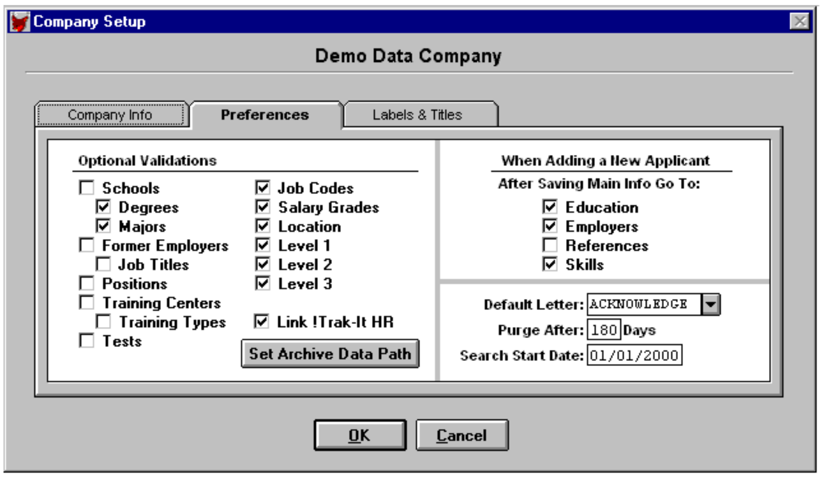
!Trak-It Applicant will interact with !Trak-It HR to automatically determine and assign the next sequential Employee Number available in !Trak-It HR. If you desire, you can change that number before proceeding.

When the new employee number is assigned, choose the OK button to make the selection. Choose the Cancel button to return to the Top Menu Bar without transferring the applicant's data.

Note: When you transfer applicants to !Trak-It HR, all of the applicant's information still remains in !Trak-It Applicant. This ensures that your EEO reports, as well as other reports that generate totals, are correct.

Add an Employee as Applicant

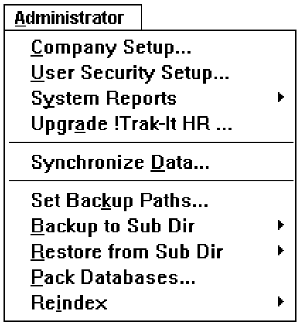
If an existing employee is applying for an open position within the company, the Add Employee as Applicant utility is a useful tool to move all the necessary applicant related data from !Trak-It HR to !Trak-It Applicant. Be sure the systems are linked together by clicking in the check box on the Link to HR option available on the Preference tab on the Company Setup screen in the Administrator menu.



To add an employee as an applicant, select the Add Employee as Applicant utility from the Utilities menu. The Find an Applicant screen will prompt you to enter the Name or Applicant Number of the employee whose relevant records need to be moved from HR to Applicant.

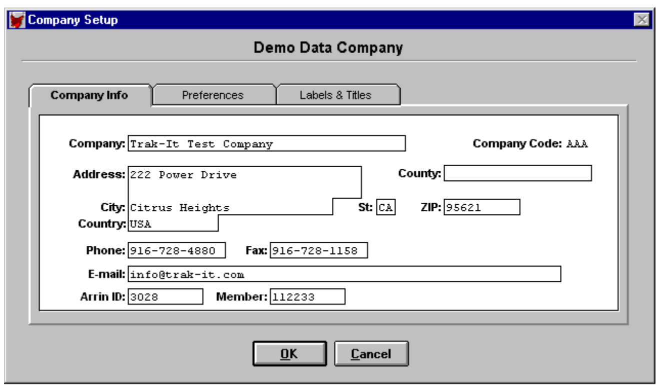
Administrator Menu

If you have Administrator privileges, you will have access to this menu. When you initially installed !Trak-It Applicant, Administrator privileges were assigned to specific users.



Company Setup

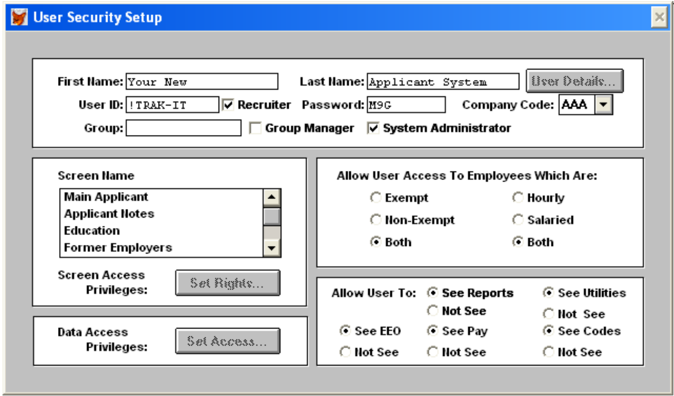
When you initially installed !Trak-It Applicant, the Company Setup screen was displayed for you to set up !Trak-It Applicant specifically for your company.



The Company Setup screen is used to define your company name and address, enable or disable certain code table validations, and establish new applicant record sequencing. It also allows you to set up names for user defined data items. This menu option is explained in detail in Chapter 3, *Getting Started*. If you would like to change any of the items on the Company Setup screen, pull down Administrator from the Top Menu Bar and choose Company Setup. You must be the System Administrator to access this screen. See the appendix, *Screen Data Elements*, for a description of each data item.

User Security Setup

When you select User Security Setup, the following screen is displayed for you to add users or modify the existing users' rights. The Tool Bar is available for you to add, edit or delete users.



On the User Security Setup screen you can add new users, change data access privileges for existing users, or delete users.

Click in the check box next to *System Administrator* if the user is to have Administrator privileges. If the user does not have Administrator privileges, the user will not have access to the items under the Administrator menu. Usually, only the System Administrator should have Administrator privileges to control the privileges and restrictions of the other users.

You can identify a specific group of applicants by entering a name in the *Group* name field and assign someone in that group as Group Manager by clicking in the check box next to Group Manager. A Group Manager should be the person who has the authority to establish privileges on the system for users in his group.

In the *Allow User Access to Applicants Which Are* section you can specify the user's access or restriction to applicant records according to their Exempt status and whether they are Hourly or Salaried by clicking on the appropriate radio buttons.

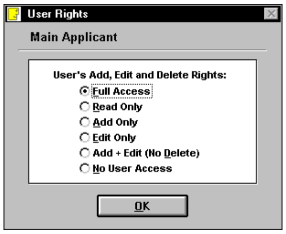
In the *Allow User To See* section, click on the appropriate radio button to allow or restrict access to EEO information available on the right side of the General tab of the Main Applicant screen. You can allow or restrict access to applicant pay information available on the Status tab of the Main Applicant screen by clicking on the appropriate radio button. You can restrict the user from accessing the Code Tables by clicking on the appropriate Not See radio button. You can also restrict access to several of the Utilities menu selections by clicking on the appropriate Not See radio button. The Utilities menu selections which will be restricted are Change Applicant Number, Mass Update Any Field, Archive or Delete Applicants, Retrieve Archived Applicants, and Purge Archive.

Adding a New User

Browse the current users and select a user whose privileges most closely match the privileges you want to establish for the new user. Click on the Add icon button. A blank screen will be displayed with the same user access privileges the same as for the previously selected user. Enter the new user's name, user ID, and password. Click on the Save icon button to save the user record.

Screen Access Privileges

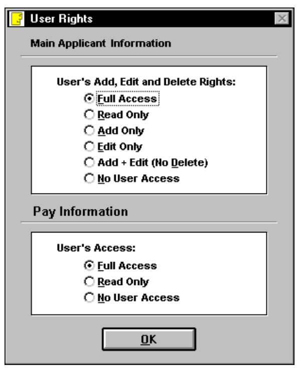
You can control the type of access a user has to the applicant data screens. In the *Screen Name* section, select a screen by using the scroll bar on the right. Click on the Set Rights button. The following screen will be displayed for you to select the user's access privileges for the selected screen.



Click on the appropriate radio button to designate any access restrictions or privileges. The options are Full Access, Read Only, Add Only, Edit Only, Add & Edit (No Delete), and No User Access. Click on the OK button when done.

Main Applicant Security

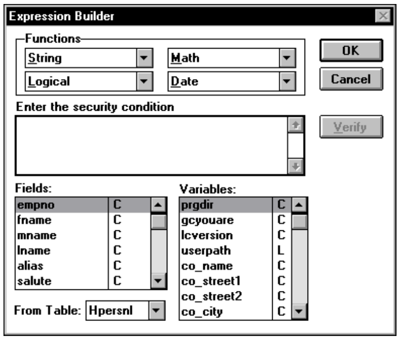
If you select Main Applicant from the Screen Name list, the following User Rights screen will be displayed.



The upper section of the screen is the same as the User Rights screen previously discussed. Included on the Main Applicant Information User Rights screen is Pay Information privileges. You can allow Full Access, Read Only, or No User Access to certain information on the Application and Status tabs of the Main Applicant screen. Click on the appropriate radio button to set the privilege. Click on the OK button.

Data Access Privileges

User data access can be set according to criteria that you specify by clicking on the Set Access button in the Data Access Privileges area. The following screen will be displayed.



By using the expression builder screen, you can enter a function to allow or restrict user access to those applicants in a specific department, job group, or whatever criteria you may need. You may want to allow users from the Engineering Department (j-level2 = "ENG") to have access only to the records of the applicants in the same department. Enter the security condition and click on OK to set the data access rights.

System Reports

When you select System Reports, a cascading menu appears for you to select User List or Error Log.

User List

User List is a report of your users' ID, last name, and first name. When you select User List, the following screen appears.

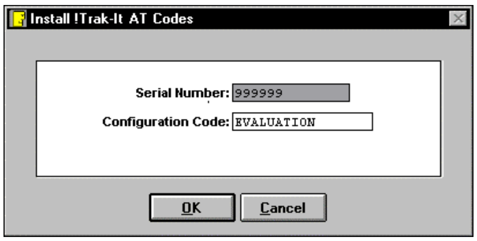
Select Print Setup to display a Windows dialogue box for you to select your printer settings. Select Print to send your report directly to the printer. Select Preview to view the report on the screen. If you choose to preview the report, click on the Zoom In button to view the !Trak-It Applicant User List.

Error Log

Error Log is a log of situations encountered while using !Trak-It Applicant that cause an abnormal operation, e.g., a missing data file. This information can be useful to Technical Support if you are having a problem that is occasional or hard to reproduce. This option functions similarly to the User List as explained above except that you will have the option of clearing or deleting the Error Log file. Feel free to respond with yes to the Clear? screen if you have no unresolved problems.

Upgrade !Trak-It Applicant

Choose Upgrade !Trak-It Applicant under Administrator from the Top Menu Bar to upgrade !Trak-It Applicant.



The Serial Number will automatically be displayed. You will need to enter the Configuration Code given to you with your upgrade. Contact !Trak-It Solutions for more information on upgrading your system.

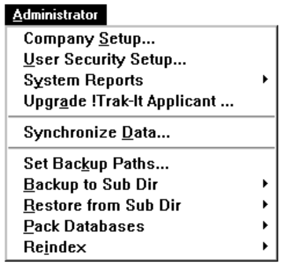
Synchronize Data

In certain circumstances it is possible for the related data in the databases to be out of agreement. The Synchronize Data utility selections are based on established database relationships that should be in sync. One such example involves Job Code validation. If you initially entered Job information without using Job Code validation and later activated Job Code validation, the Synchronize Job Codes selection would resolve the situation.

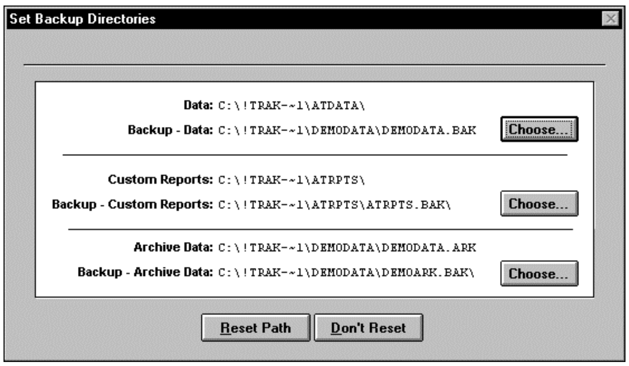
This utility is available for such situations. Select the desired option from the Synchronize Data screen and click on the OK button. This utility is not for routine use.

Set Backup Paths

Pull down Administrator from the Top Menu Bar to reset the path to your applicant backup data, custom reports, both data and custom reports, and archive data. If you have a single user system the backup paths can be set to an area on your network disk.



The following Set Backup Directories screen will be displayed showing the existing backup data paths for data, custom reports, and archive data.



Click on the Choose button to select another backup subdirectory. When you backup your data, your backups will be located in these subdirectories. Click on the Reset Path to reset the path of your backup subdirectories. Click on Don’t Reset to cancel request.

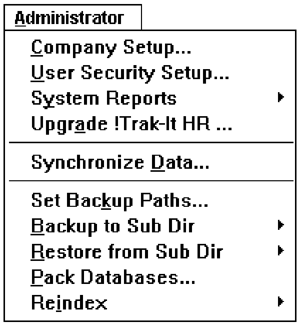
Important Notes:

1. Always choose separate folders to for each kind of backup.
2. The default backup paths are to folders inside the respective folders.
3. For single user systems it is suggested you set your backup paths to folders on your network server’s drive. Your network system administrator will need to set this up for you.
4. The paths set are from the currently accessing user to the server, thus there is a potential drive letter problem if others with differing drive letters for the server attempt to backup or restore data.

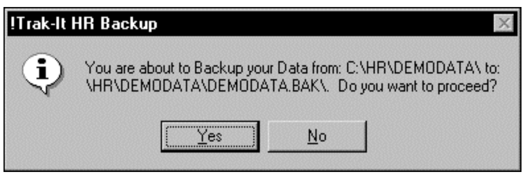
> **Warning:** In multi-user sites, the next four selections in the Administrator menu — Backup to Sub Dir, Restore from Sub Dir, Pack Databases, and Reindex — can only be accomplished when all other users have exited !Trak-It Applicant.

Backup to Sub Dir

Choose Backup to Sub Dir under Administrator from the Top Menu Bar to backup your files. A submenu will display the options of backing up your Data, Reports (or both), or your Archive data.



When you make a selection the following alert will be displayed.



A strong warning is given for you to be certain you are satisfied with the copy that will take place. Respond by clicking on Yes to continue or No to cancel. You specify the names and locations of the Backup Data, Backup Custom Reports, and Archive Data with the Set Backup Paths utility discussed in the previous section. Periodically, backup your subdirectories to a floppy disk (usually a: drive) and store in a safe place. Then, if there is a problem with the copy on your hard disk, you will still have this secondary copy of the data on your floppy disk. You are also prompted to backup your data and/or reports when you exit !Trak-It Applicant if you have Administrator privileges.

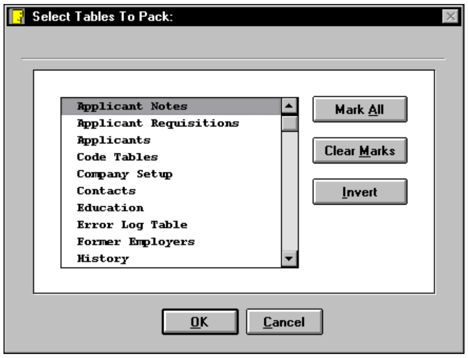
Restore from Sub Dir

Restoring data from the Sub Directory destroys the current version of your data files, custom reports, both data and custom reports, or archive data and restores the data that is stored in the currently selected backup subdirectories.

> **Remember:** When you Restore Data, your backed up data from the backup first erases all your current data and settings and then restores them to exactly what they were when you did your last backup.

Pack Databases

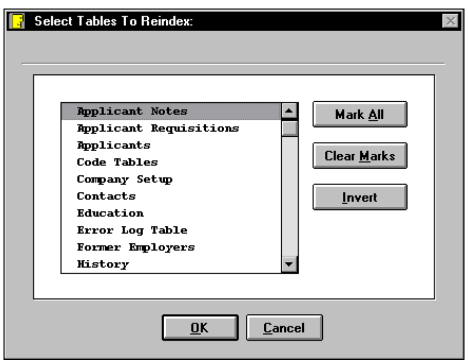
Pack Databases will allow you to pack some or all of your databases to minimize disk space used by !Trak-It databases.



You can select specific databases or mark all of the databases to pack via the Select Tables to Pack screen. Packing your files has little effect unless you have many deletions.

Reindex

Reindex recreates the indexes of your current databases that provide rapid access to your data. If !Trak-It Applicant ever acts strangely and does not retrieve the correct data, selecting Reindex usually clears up the problem. It may be necessary to use this utility if you have a power or hardware failure. The following screen will display when you choose Reindex from the Administrator menu.



A dialog box appears for you to Select the tables to re-index. You can select Mark All to select all the tables or click on the specific table to select only the tables you would like to reindex.

Important: If you are on a multi-user installation, be sure everyone else is completely logged out of !Trak-It Applicant before using the Reindex utility. You can use this option at any time without hurting anything; however, once you have started the process, **you must let it run to completion**, which may take several minutes, depending on how much data you have stored.

Chapter 11
!Trak-It Extract Option

!Trak-It Extract (Scan) is an extra cost option designed to speed the entry of applicant data into your !Trak-It Applicant system. Scanning resumes and extracting pertinent resume information will save hours of time and also eliminate data entry errors. !Trak-It Extract (Scan) extracts applicant data from the resumes you have scanned and stored into your computer using your scanning hardware and software. The extracted data can then be reviewed and transferred into your !Trak-It Applicant databases.

Overview

The process for getting the important information from an applicant's resume into your !Trak-It Applicant database is quite simple with the use of !Trak-It Scan.

1. **Create your Code Tables and Synonyms**

   Customize your Code Tables and Synonyms to include all the codes for skills, job titles, positions, schools, majors, degrees, and former employers that you are interested in extracting from your scanned resumes. Be sure your Synonyms Code Table contains all the variations for any particular code. Your Synonyms Code Table can be updated at any time to include any new codes that you recognize as necessary for accurate extraction of resume data.

2. **Setup your Extraction Options.**

3. **Scan Resumes into a resume subdirectory**

   Using your scanner and its accompanying software, scan in the resumes of interest. Each resume needs to create a separate *.txt* file in your resume subdirectory. Or if the resume is in an electronic form such as a Word doc, RTF or HTML file, then Extract (scan) will automatically convert the file to a .txt format, save the original in a default folder and then proceed to do the extractions. Extract (Scan) will also automatically process Monster.com resumes without you first having to open them.

4. **Review and make any necessary revisions on the extracted applicant data**

   The extracted applicant data gets stored in a temporary database awaiting your review. Make any necessary updates to the temporary applicant records.

5. **Transfer the applicant data into your !Trak-It Applicant system**

   The final step is to transfer the data into your !Trak-It Applicant databases along with a copy of the resume text.

Another Tool for Resume Submission

The !Trak-It Applicant Web Interface extra cost option provides a bridge between interested applicants and your company. Requisitions can automatically be posted on the web or your intranet. Applications and resumes can be easily downloaded to your Windows NT or 2000 server or later. Resumes can be directly submitted through your company's web site. See Chapter 12 of this manual for further information.

Upgrading to !Trak-It Extract (Scan)

If your license for !Trak-It Applicant includes the scanning option, no further installation is needed. You are ready to go to the *Using !Trak-It Scan* section of this chapter. If you licensed !Trak-It Applicant without the scanning option and later decided to upgrade your program to include !Trak-It Scan, you need to contact Trak-It Solutions to get a new configuration code.

The procedure for installing !Trak-It Scan is simply a matter of upgrading !Trak-It Applicant to include the scan option. Once you have upgraded, you can extract data from ASCII text resume files into your !Trak-It Applicant database.

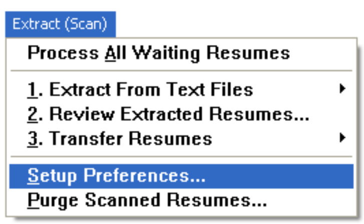
Setting Up Extract

First, be sure your Synonyms Code Table and the Code Tables for former employers, job titles, positions, schools, majors, degrees, and skills ere set up with all the codes you want to recognize on your scanned resumes. It is imperative that the Synonyms Code Table contain all the possible variations for any of the codes you are extracting. For example, UCLA should also be recognized as U.C.L.A. or University of California - Los Angeles.

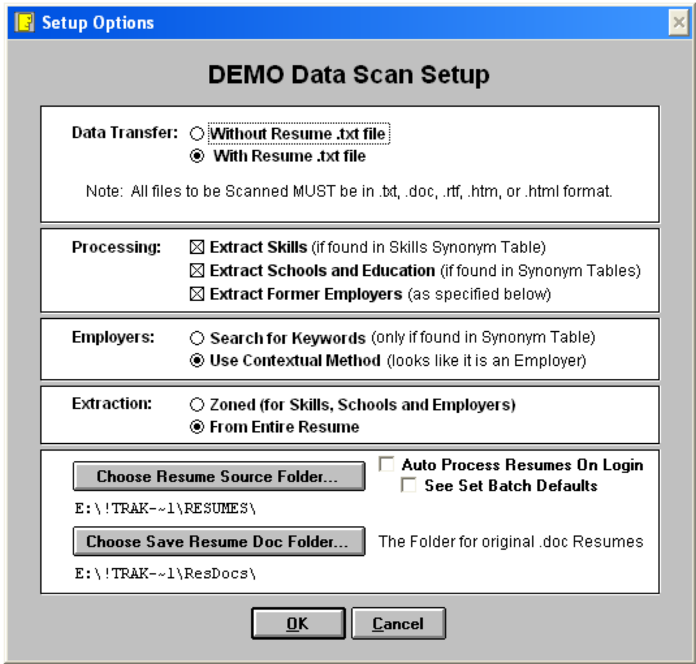
After setting up your Code Tables, you must set up your extraction preferences.

Setup Preferences

Pull down the Extract menu on the Top Menu Bar. Select the **Setup Preferences** option.



The Set Options screen will display.



The Set Options screen contains all the options for selecting the data transfer word processor and for setting your preferences for extraction criteria.

Processing

During the extraction process, !Trak-It Scan will extract the information from the scanned resume *.txt* file based on the selections you set on the Set Options screen.

Click on the corresponding check box to direct !Trak-It Scan to extract one data item or any combination of the data items listed on the screen.

There are three choices for data extraction:

1. Skills
2. Schools and Education
3. Former Employers

It is important that your Synonyms Code Tables contain all the possible synonyms for skills, former employers, schools, degrees, and majors that you want to extract from the resume. The synonyms that you set up in the Synonyms Code Tables need to represent all the variations of the skills, former employers, schools, degrees, or majors that will be entered into the applicant records.

Employers

During the employer extraction, !Trak-It Scan will search for former employers based on either keywords or context.

Search for Keywords
If you select Search for Keywords, !Trak-It Scan will select only those employers found in the Synonyms Code Table. Searching for Keywords will eliminate many irrelevant jobs, such as fast food companies.

Use Contextual Method
If you select Use Contextual Method, !Trak-It Scan will select all employers found in the context of the resume without referring to the Synonyms Code Table.

Extraction

The area to be searched for the extraction process can be zoned to certain portions of the resume or the search can be over the entire text of the resume.

Zone
Click on the Zoned radio button to direct !Trak-It Scan to search for the specified extraction items (skills, schools, former employers, and/or references) only in portions or zones of the resume for matches in your Synonyms Code Tables.

Entire Resume
Click on the From Entire Resume radio button if you want the entire text of the resume to be searched for all extraction items.

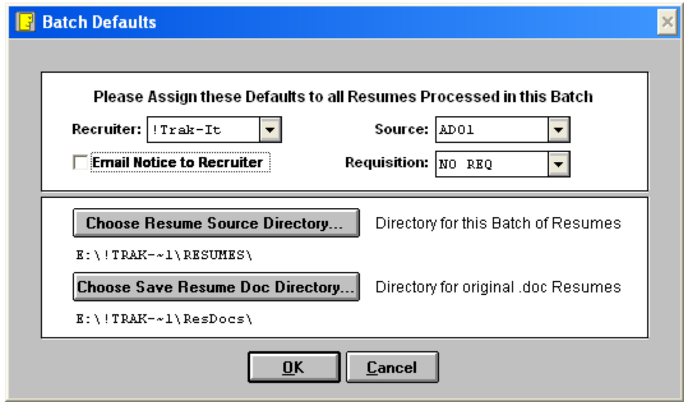
Other Defaults

Choose Resume Source Folder
Select the default folder for unprocessed resumes to be stored.

Choose Save Resume Doc Folder
Specify the folder where you want original .doc, .rtf, .htm files to be stored.

Auto Process Resumes on Login
A check in this box means that after successfully logging into Applicant, the system will prompt the user to have all the resumes processed now, if there are any resumes in the default folder specified above.

See Set Batch Defaults
If this selection is made then whenever the user wants to process a batch of resumes the following screen appears allowing the user to set defaults for this batch.



The Recruiter drop down allows the user to choose the recruiter assigned to this entire batch of resumes.

The Email check box if checked will automatically send the above chosen recruiter a list of applicants that were entered from this batch.

The Source drop down allows specification of where this batch came from.

The Requisition drop down allows specification of the requisition this whole batch is assigned to.

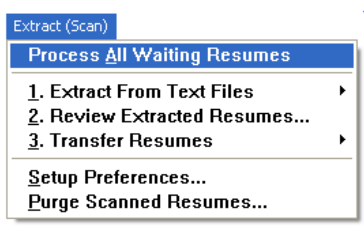
Choose Resume Source Directory specifies the source folder for this batch.

Choose Save Resume Doc Directory specifies where any .doc, .rtf or .htm files will be saved.

Using !Trak-It Extract (Scan)

All scanning options are found on the Extract (Scan) menu on the Top Menu Bar in !Trak-It Applicant. After setting up your Code Tables and preferences, scan the resumes of interest into your Resumes Folder. Then you are ready to extract, review, and transfer the applicant information using the following selections. (You can practice by switching to Demo data and using the demo resumes).

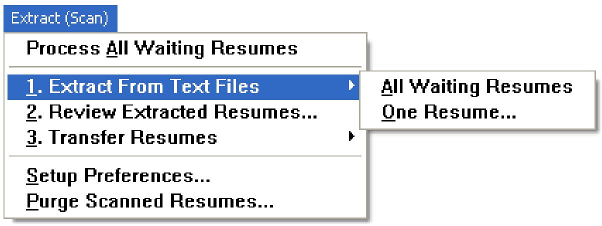
Process All Waiting Resumes



The first item on the Scan menu is Process All Waiting Resumes. This option accesses the Resume folder setup via the scan Setup Preferences screen. It completely processes all resumes in the folder by the rules you set up on the Setup Preferences screen and the values in your code tables such as skills and skill synonyms. The extracted data is put into the databases and a copy of the resume is stored with the applicant's info. At the completion of this automated process a list of all processed applicants is displayed for you to easily access. All .doc, .rtf, .htm or .html files will be first converted to .txt files silently using MS Word on your computer. Saving the originals in the specified folders.

Extract From Text Files

This item is the first step of the automated process described above providing a convenient means of dealing with challenging scans. It is here for demonstration purposes and trouble shooting resumes with problems. Extract places all extracted data into temporary databases for review and possible editing before adding the data to your !Trak-It Applicant databases.



Note: Before using the Extract option, you must first setup your Preferences as discussed above.

Once you are satisfied with the data extracted from the resume, you have the option of leaving it in the temporary database for a later transfer, or transferring it to the !Trak-It Applicant databases. Select the Extract option on the Scan menu to display the drop-down Extract sub-menu.

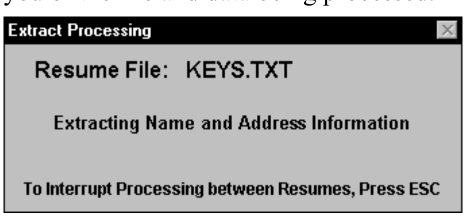
The Extract From Text Files menu has two selections.

All Waiting Resumes

You may have scanned in several resumes at one time and now you want to extract the data from the entire group of scanned resumes. If you select the All Waiting Resumes option, !Trak-It Extract (Scan) will extract data from all unprocessed resumes, one after the other, until all resumes with a *.txt* extension have been processed from your default folder.

Resumes with .doc extensions use an OLE call to your copy of MS Word, which automatically converts it to a .txt file and stores the original .doc file in the Resume Doc folder you specified on the Setup screen. The extracted data is held until a transfer to your !Trak-It Applicant databases is done.

During each step of the extraction process, the Extract Processing screen will appear, informing you of the file and data being processed. If you want to interrupt the process, press the ESC key.

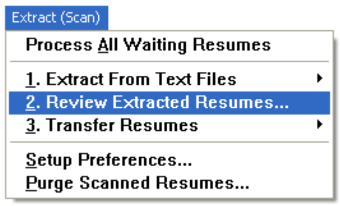


One Resume

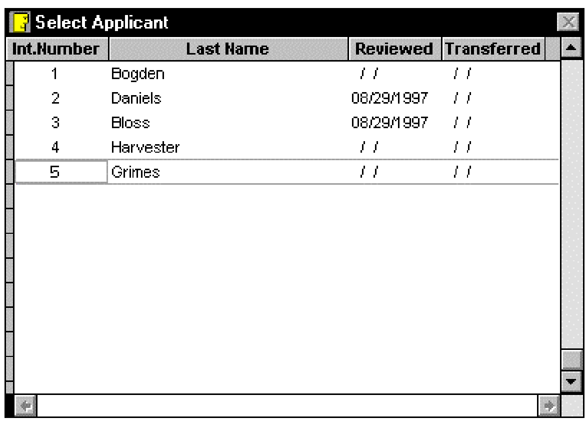
The second option on the Extract menu is One Resume. Select this option when you want to extract applicant information from one specific resume. !Trak-It Scan will display a list of all available *.txt* files in the default Resume folder. Click on the resume file you want to extract and click on the Open button. The selected resume will then be extracted.

Review Extracted Resumes

The second menu item on the Scan menu is Review Extracted Resumes.



This option is used to review the results of the extraction process. A quick visual review will verify whether the information has been correctly extracted. This step is done in case any data was misinterpreted or missed during the extraction. Select the Review Extracted Resumes option on the Scan menu to display the Select Applicant screen. This step is skipped if you choose to Process All Waiting Resumes.

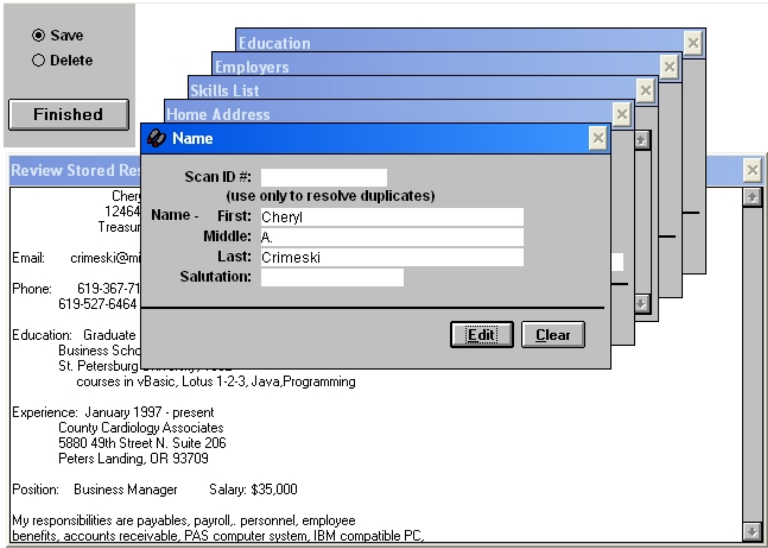


Upon selection of this option, a browse screen of all applicant files in the temporary database will display. The browse screen will display two date fields for each applicant.

1. Reviewed - The last date the resume was reviewed
2. Transferred - The date the extracted information was transferred to !Trak-It Applicant

Highlight the applicant to be reviewed and press the Enter key or the right mouse key. The applicant's extracted data will be displayed in a series of windows containing the various applicant data.

From the Select Applicant screen, press the ESC key if you want to return to the Applicant Assistant screen.

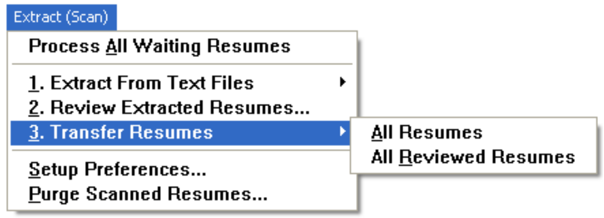


Review the data in each window, making any necessary corrections by clicking on the edit button. The stored resume is available for comparison in the background of the series of windows. Simply click on any part of the resume to bring it into view. Click on the Finished button in the upper left corner to exit and Save the review screens. A review date will be automatically entered for any applicant that has been reviewed. Click on the Delete radio button and then the Finished button to discard the applicant and all their data.

The Select Applicant screen will re-display. Select any other applicant needing review by clicking on the appropriate applicant listed on the browse screen and pressing the Enter key. When all necessary reviewing is complete, press the ESC key on your keyboard to return to the Top Menu Bar and Applicant Assistant screen.

Transfer Resumes

The next option on the Scan menu is Transfer Resumes. The Transfer Resumes option is used to transfer applicant information to !Trak-It Applicant. When a transfer of extracted resume data takes place, the resume image will also be transferred to the applicant resume database file in !Trak-It Applicant. When a resume is transferred to !Trak-It Applicant, it is removed from the !Trak-It Scan database. Select the Transfer Resumes option on the Scan menu to display the drop-down submenu.



The Transfer menu has two selections.

All New Resumes

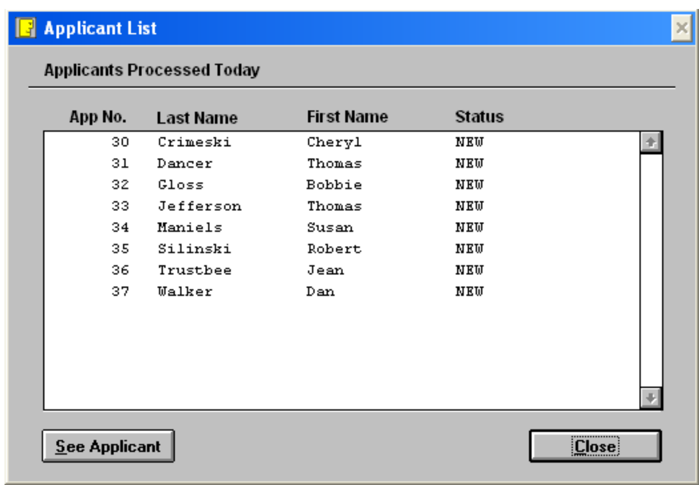
If the All New Applicants menu item is selected, !Trak-It Scan will transfer all resumes that have not previously been transferred to !Trak-It Applicant, even if the data has not yet been reviewed.

All Reviewed Resumes

If the All Reviewed Resumes menu item is selected, !Trak-It Scan will transfer only the extracted applicant information for those applicants that have been reviewed, yet not transferred. The two date fields are used to determine which applicants to transfer. The number of applicants transferred will be displayed.

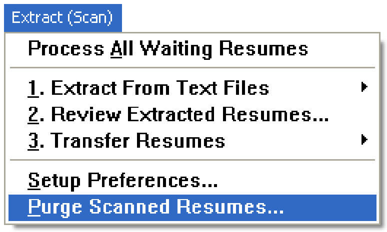
After Scanning a Batch of Resumes

If you have processed a batch of resumes, upon completion of transfer to your databases the following screen will appear containing the newly added applicants as well as any other applicant whose status changed today.



Double click on an applicant to go directly to their Main Applicant screen.

Purge Scanned Resumes



This choice allows for a group of resumes to be deleted before they are added to your searchable applicant files.

Chapter 12
Web Interface Option

The !Trak-It Applicant Web Interface extra cost option provides a bridge between interested applicants and your company. The interface may be used with any web server for Windows 98, 2000, NT or XP that supports Active Server Pages (ASP) and the Windows CGI (WinCGI) specification. Web servers such as Microsoft Internet Information Server (IIS) are recommended.

Functions

Once installed on your server, the !Trak-It Applicant Web Interface displays open requisitions to your website visitors and accepts resumes from interested applicants.

Requisition Display

The web interface will display all open requisitions in your !Trak-It Applicant system that are flagged to be displayed on the web. You may set which requisitions you wish to publish by changing the "Publish On Web" checkbox on the requisition screen of the !Trak-It Applicant System. The web interface will list the requisitions on the web as follows:

1) *A listing of* categories *that have job openings (the category field on the requisition screen)*
2) *A listing of* individual job titles *in each category*
3) Individual job detail *page displaying the requisition description and requisition requirements fields. These fields may be set by clicking on the Description button on the requisition screen. If you like, you may include HTML style tags in these descriptions.*

Resume Submission

Interested applicants can automatically submit a resume into your !Trak-It Applicant system using the !Trak-It Applicant Web Interface. An existing resume that is suitable for import or a resume created by the web interface resume maker can be submitted. All resumes gathered from the web are placed in a subdirectory as text files. To read them into !Trak-It Applicant, simply direct the !Trak-It Scan option to that directory and it will read in all the resumes.

Installation Procedures

The web interface consists of several Active Server Pages (ASP) and HTML files and one DLL that contains the core interface. The installer will request a location to install these files. You may install them anywhere. However, if the folder you choose is not under your web server's root documents directory then you will need to define a virtual directory mapped to the install point.

Once the installation has completed successfully, you will need to edit the atweb.ini configuration file to reflect your server's environment. A shortcut to the file has been added to the !Trak-It program group in your start menu and is labeled "AT Web Configuration".

The following is a description of the parameters contained in the atweb.ini file.

[Paths]

The following contains the path information the scripts require to run properly.

datadir	The pathname of the ATDATA folder that is used by the !Trak-It Applicant System.
resumedir	The directory that will hold the resumes submitted through the web interface.

Implementing the AT Web Interface:

To add the web interface to your existing web site, simply create a link to the ReqList.asp page similar to the one below:

```
<A HREF="http://www.mycompany.com/ATWeb/ReqList.asp?Company=AAA">Browse our
online job listings today!</A>
```

Note: "AAA" should be changed to the 3 character Company ID used in your !Trak-It Applicant System.

Sample atweb.ini File

The following is a sample atweb.ini file. In this case, !Trak-It Applicant is stored on another computer on the network mapped as the F drive. This is also the location where resumes should be saved.

```
[Paths]
datadir=F:\!Trak-It AT\Atdata
resumedir=F:\!Trak-It AT\Resumes
```

Appendices

Page *Appendix and Description*

Page		Appendix and Description
121	A	Screen Data Elements
141	B	Data Dictionary
157	C	Exporting and Importing Data
159	D	System Configuration
161	E	Multi-User Network Option
163	F	Functions, Expressions, and Record Filters
175	G	Trouble Shooting
177	H	Standard Reports List
181	I	Small Business vs. Standard Edition Features
183	J	Web Connections

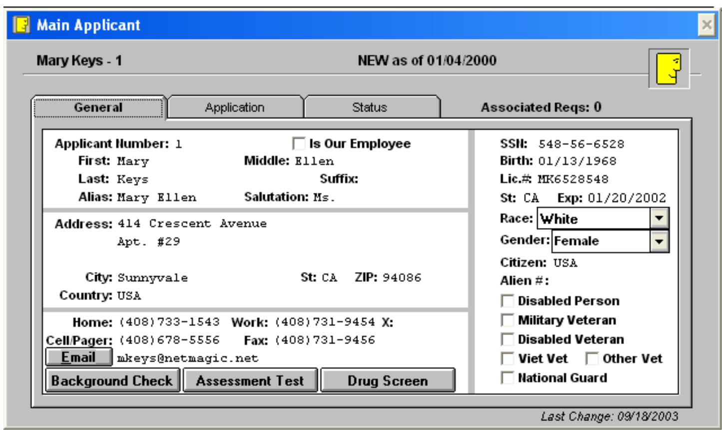
Appendix A
Screen Data Elements

This appendix describes the data items that are on each of the !Trak-It Applicant screens. The screens are shown in the same sequence as they appear in the Screens menu and are followed by the Company Setup and User Security Setup screens. Data items are listed in screen appearance order.

Format of the data item description:

[Items in brackets are selected from a drop-down list based on indicated table]
(Items in parentheses are hard-coded values displayed in a drop-down list)
{Items in braces indicate a check box - a check in the box means yes}
** Calculated data item **
Automatically displayed data item

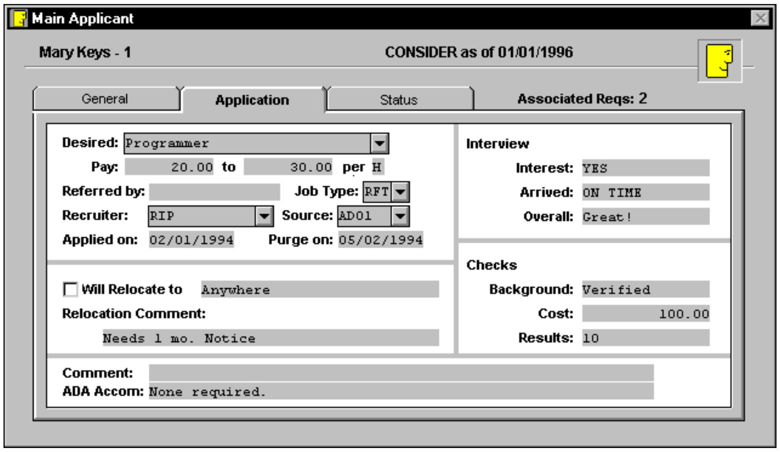
Main Applicant Screen - General Tab



Applicant Number	The next sequential number is automatically assigned on the Add Applicant screen and can NOT be changed. !Trak-It Applicant does not allow duplicate applicant numbers to be entered. Leading zeros are ignored.
Is Our Employee	{Check} if applicant is company employee applying for position.
First	Applicant's first name.
Middle	Applicant's middle name.
Last	Applicant's last name.

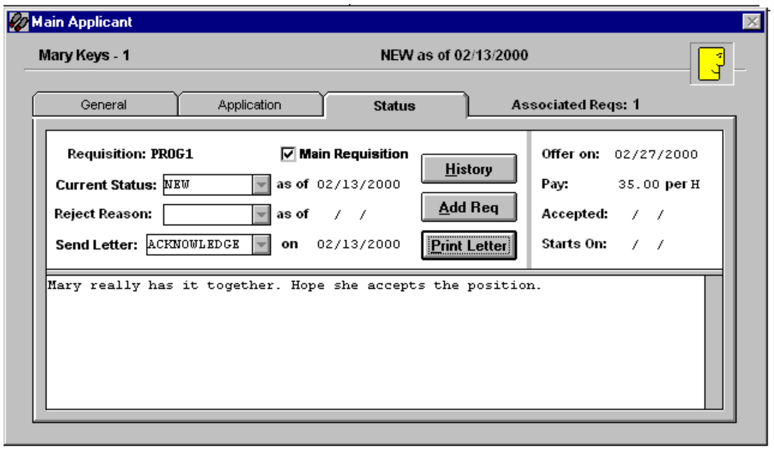
Suffix	Any desired suffix such as Jr. or Ph.D.
Alias	Applicant's alias or nickname. Alias is used in the Work Phone List. For example, Bill could be used instead of the formal name, William.
Salutation	A title such as Dr., Mr., Ms., etc. Most commonly used in custom letters. Salutation is used on letters to the applicant.
Address Line 1	Applicant's home address.
Address Line 2	2nd line of home address.
Address Line 3	3rd line of home address.
City	City
State	Select [State] from the States Code Table.
ZIP	Applicant's Zip Code.
Country	Country - Defaults to country specified on Setup screen.
Home	Applicant's home phone number.
Work	Applicant's work phone number. If all applicants have the same main number, you can leave this data item blank.
X	Applicant's work phone extension, if any.
Cell/Pager	Applicant’s cell or pager number, if any.
Fax	Applicant’s fax number, if any.
E-mail Address	Applicant’s e-mail address, if any.
SSN	Applicant’s social security number if country is USA.
License	Applicant’s driver’s license number, if any.
St	Applicant’s driver’s license State of issuance
Exp.	Applicant’s driver’s license Expiration Date
Race	Select (Asian, Black, Hispanic-White, Hispanic-Non-White, Indian(Amer.), Pacific Islander, White, or Unknown).
Gender	Select (Male, Female, or Unknown). Required for EEO reports.
Citizen of	Country of Citizenship
Alien #	Alien Registration Number.
Disabled Person	Check {Disabled} if applicant is disabled.
Military Veteran	Check {Military Veteran} if yes.
Disabled Veteran	Check {Disabled Veteran} if yes.
Vietnam Veteran	Check {Vietnam Veteran} if yes.
Other Veteran	Check {Other Veteran} if yes.
National Guard	Check {National Guard} if yes.

Main Applicant Screen - Application Tab



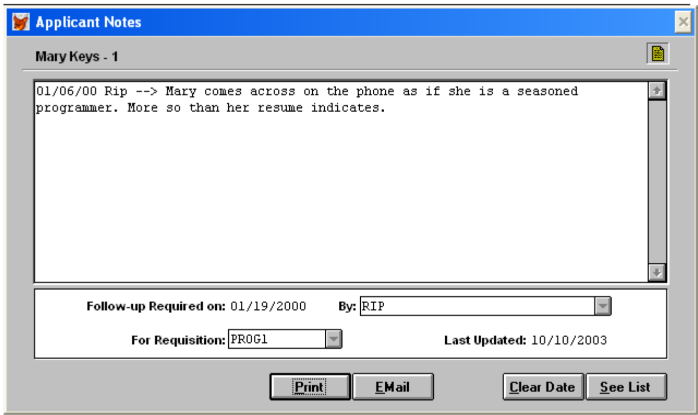
Desired	Select [Position] applicant desires from the Positions Code Table.
Pay	Enter minimum pay range desired by applicant.
To	Enter maximum pay range desired by applicant.
per	Select pre-defined (pay period).
Referred by	Source of applicant.
Job Type	Select [Job Type] from the Job Types Code Table.
Recruiter	Select [Recruiter]. Generates statistics on effectiveness of recruiters.
Source	Select [Referral Source] from the Referral Source Code Table.
Applied on	Application or Resume date.
Purge on	Date after which this applicant record can be purged.
Will relocate to	{Check box} if applicant will relocate. Enter relocation area.
Relocation Comment	Comment pertaining to the relocation.
Comment	Any comment on the applicant.
ADA Accom	American Disability Act Accommodations.
Misc1 - Misc6	User-defined miscellaneous applicant offer and status data items. The title or caption displayed for this item can be changed via the Labels and Titles tab of the Company Setup screen under Administrator on the Top Menu Bar. This item can be used however you wish.

Main Applicant Screen - Status Tab



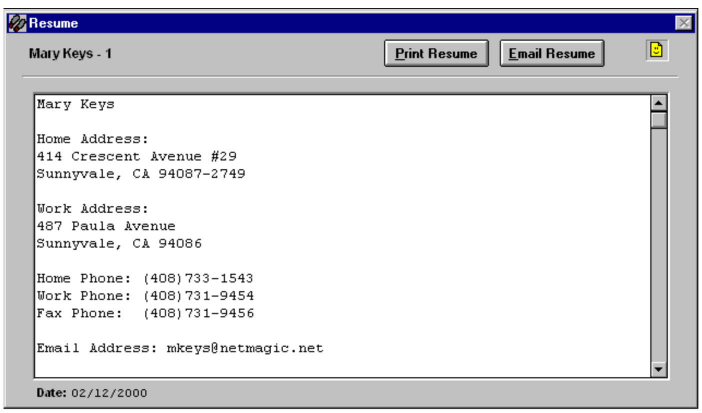
Requisition	##Requisition ID##
Main Requisition	{Check Box} if this requisition is the main requisition for the applicant.
Status	Select [Status Code] which describes the current status of the requisition. When a requisition is first assigned to an applicant, the status of NEW is automatically entered.
as of	The date the status became effective.
Reject Reason	Select [Reject Reason] if applicant was rejected for the requisition.
as of	The date the reject became effective.
Letter	Select [Letter Code] from drop-down list indicating letter to be mailed.
sent	The date the letter was mailed.
Offer on	The date the offer was made to the applicant for this requisition.
Pay	The pay that was offered to the applicant for this requisition.
per	Select appropriate (Pay Period).
Accepted	The date the offer was accepted by the applicant.
Starts on	The date the applicant will begin work.
Notes	Approximately 7 pages of notes regarding the applicant can be entered on this record. Optionally this will display status changes and other applicant related events.

Applicant Notes Screen*



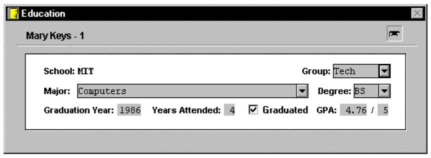
Notes	Approximately 7 pages of notes regarding the applicant can be entered on this record.
Follow-up Required on	Date to follow-up on notes, if any.
By	Select [Recruiter] responsible for follow-up from Users List.
For Requisition	Select [Requisition ID] which the note pertains to.
Updated	Date the note was updated.

Resume Screen

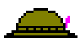


Resume	The text of the applicant's resume taken from a .txt file.
Date	The date the resume was entered or edited.

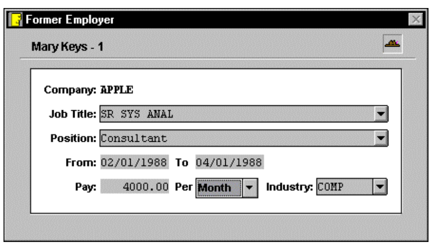
Education Screen



School	Select [School] attended.
Group	Select [School Group], if any.
Major	Select [Major].
Degree	Select [Degree] received.
Graduation Year	Year graduated.
Years Attended	Years attended at the specified school.
Graduated	Check {Graduated} if yes.
GPA	Grade point average / GPA base.

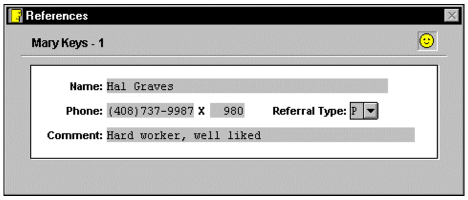


Former Employer Screen

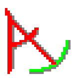


Company	Former employer's company name.
Job Title	Select [Job Title] from the Job Titles Code Table.
Position	Select [Position] from the Positions Code Table.
From	Start date of the position.
To	End date of the position.
Pay	Applicant's pay for the position.
Per	Select (Hour, Week, Bi-Week, Semi-Month, Month, Year, Unit), whichever applies to the above pay.
Industry	Select [Industry] from the Industry Code Table.

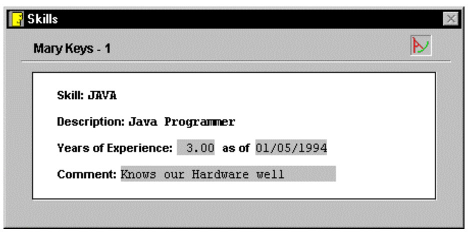
References Screen*



Name	Name of reference.
Phone	Phone number of reference.
X	Extension.
Referral Type	Select [Referral Type] from the Referral Types Code Table.
Comment	Any comment pertaining to the reference.

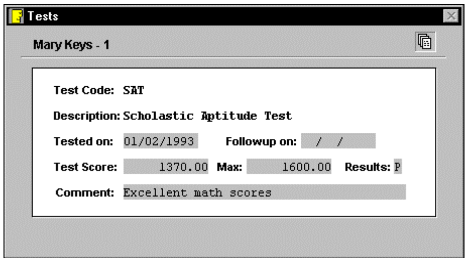


Skills Screen



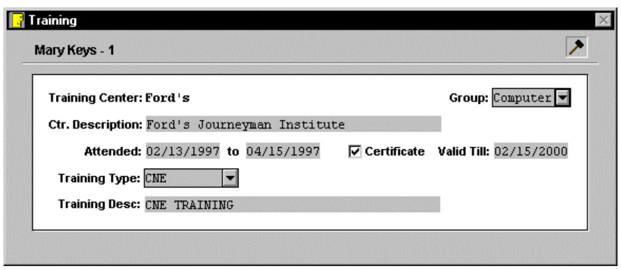
Skill	Select applicant's [Skill] from Skills Code Table.
Description	##Description of skill##
Years of Experience	Years of experience in this skill.
as of	Years of experience as of date.
Comment	Any comment.

Tests Screen*



Test Code	Select [Test Code] for the test taken by the applicant.
Description	##Description of the test##
Tested on	The date the applicant took the test.
Follow-up on	The date follow-up should take place regarding test results, etc., if any.
Test Score	The score the applicant received on the test.
Max	The highest score possible for the test.
Results	Any known results of the test, such as pass, fail, etc.
Comment	Any comment pertaining to the test.

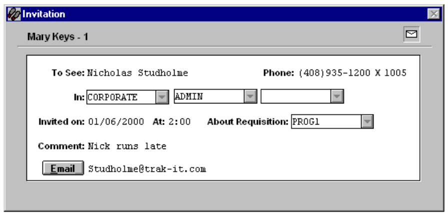
Training Screen*



Training Center	Select [Training Center] the applicant attended.
Ctr. Description	Description of the Training Center attended. Defaults to Code Table description.
Group	Select [Group] from the Training Center Groups Code Table.
From	The start date of attendance at the center.
To	The end date of attendance at the center.
Certificate	{Check box} if certificate achieved at the center.
Valid till	Expiration Date of certificate.
Training Type	Select [Training Code] that pertains to the type of training received.

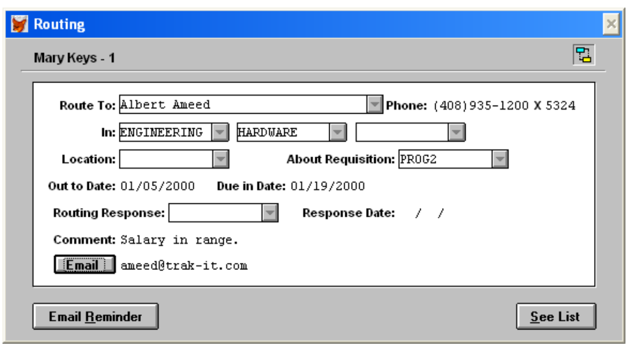
Training Description	Description of Training received. Defaults to Code Table description.

Invitations Screen*



To See	The name of the person inviting the applicant for an interview.
Phone	The phone number of the interviewer.
X	The extension of the phone number.
In	Select [Organization Levels] of the interviewer.
Invited on	The date the interview is to take place.
At	The time the interview is to take place.
About Requisition	Select [Requisition ID] to which the interview pertains.
Comment	Any comments pertaining to the invitation.

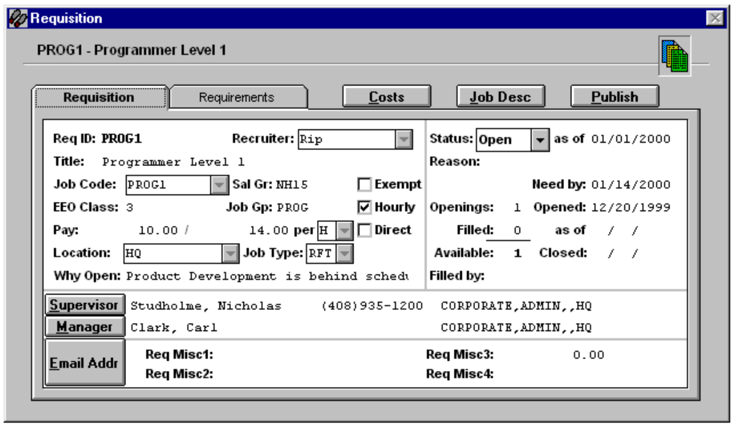
Routing Screen*



Route to	The name of the person who is to receive the applicant's resume or application.
Phone	The phone number of the person.
X	The extension.
In	Select [Organizational Levels] of the person.
Location	Select [Location] of the person, if any.
Requisition	Select [Requisition ID] that the applicant may pertains to.

Out to Date	The date the resume is sent to the reviewing person.
Due in Date	The date the resume is due back from the reviewing person.
Routing Response	The Response to applicant’s resume. From the Response Code table.
Response Date	The actual date the Routed to person response.
Comment	Any comments pertaining to the routing.

Requisition Screen

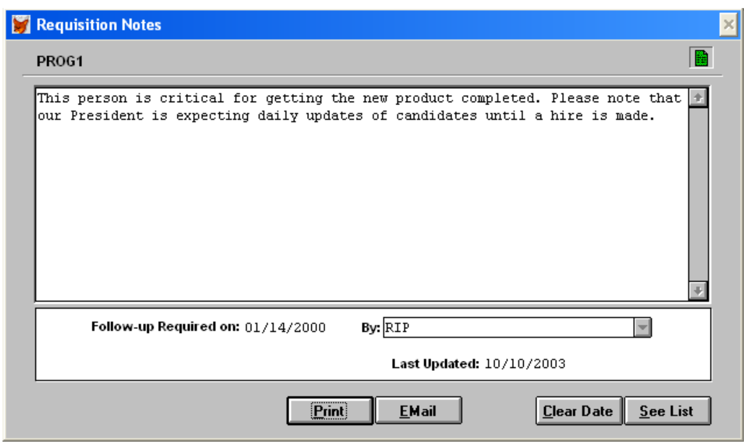


Req ID	The unique Requisition ID for the requisition.
Recruiter	Select [Recruiter] from the drop-down list based on the users.
Title	The title for the open requisition.
Job Code	Current Job Code. If Job Code Validation is in effect, select [Job Code] from the AJOBCODE Table. Refer to Chapter 4, *Understanding Code Tables,* for more information on Job Codes. If your company uses formal Job Codes, you are advised to enable Job Code Validation. If Job Code Validation is enabled, this will allow access to many useful reports.
Sal Gr	Salary Grade Code will automatically appear after Job Code is entered if Job Code Validation is in effect. Salary Grade Codes are established in the Salary Grade Code Table. If your company uses formal salary grades, you are advised to enable Salary Grade Validation. Refer to Chapter 4, *Understanding Code Tables*, for more information on Salary Grade Codes.
EEO Class	##EEO Class Code## will automatically appear once Job Code is entered if Job Code Validation is in effect.

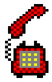
Job Gp	##Job Group## will automatically appear once Job Code is entered if Job Code Validation is in effect. The Job Group codes are established in the Job Group Code Table.
Pay	The minimum pay for this requisition. Automatically appears if Salary Grade validation is in effect. Field can be edited for the requisition.
to	The maximum pay for this requisition. Automatically appears if Salary Grade validation is in effect. Field can be edited for the requisition.
per	Select (pay period) for this requisition. Automatically appears if Salary Grade validation is in effect. Field can be edited for the requisition.
Type	Select [Job Type] from drop-down list based on the Job Types Code Table. If Requisition is for a full time position, select RFT. Select RPT for it is for regular part time position.
Exempt	Check {Exempt} if position is exempt from overtime. This field is part of the Job Code Table and will automatically display after the Job Code is entered if Job Code Validation is in effect. The Fair Labor Standards Act (FLSA) defines those applicants who are exempt from overtime pay and those who must be paid.
Hourly	Check {Hourly} if position is an hourly position. This field is set on the Job Code Table and will automatically display after the Job Code is entered. If Job Code Validation is in effect. If hourly is not checked, employee will be salaried. Passwords can control user access to only hourly or salaried applicants.
Direct	Check {Direct} if position is a direct position.
Location	Select [Location] from the drop-down list.
Why open	Comment pertaining to the reason for the requisition.
Supervisor	Enter name of supervisor for the position. Include phone number and department. If !Trak-It Applicant is linked to HR via the Preferences tab on the Company Setup screen, select [Supervisor] from the drop-down list and the phone number, organization, and location will automatically appear but can be changed.
Manager	Enter name of manager for the position. Include phone number and organization. If !Trak-It Applicant is linked to HR via the Preferences tab of the Company Setup screen, select [Manager] from the drop-down list and the phone number, organization, and location will automatically appear but can be changed.
Misc1-4	User-defined miscellaneous requisition data item. The title or caption displayed for this item can be changed via the Company Setup screen

	under Administrator on the Top Menu Bar. You can use this requisition data item to store anything you wish.
Status	Select [Status] from the drop-down list that pertains to this requisition.
as of	Effective date of current status.
Reason	Reason for current status.
Need by	The date by which the requisition needs to be filled.
Openings	The number of openings for this requisition.
Opened	The date the requisition was opened.
Filled	The number of positions filled for this requisition.
as of	The date by which the positions were filled.
Available	The **number of positions** remaining to be filled.
Closed	The date the requisition was closed.
Filled by	The name of the applicant who filled the requisition if there was only one opening.

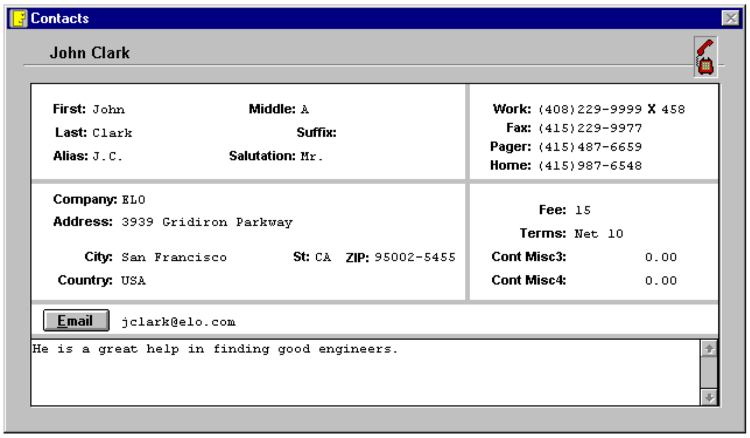
Requisition Notes Screen



Notes	Approximately 7 pages of notes regarding the requisition can be entered on this record. Each requisition can have an unlimited number of Requisition Note screens.
Follow-up Required on	Enter date any follow-up is required. A default date of 7 days after edit is automatically displayed.
By	Select [Recruiter] from drop-down list.



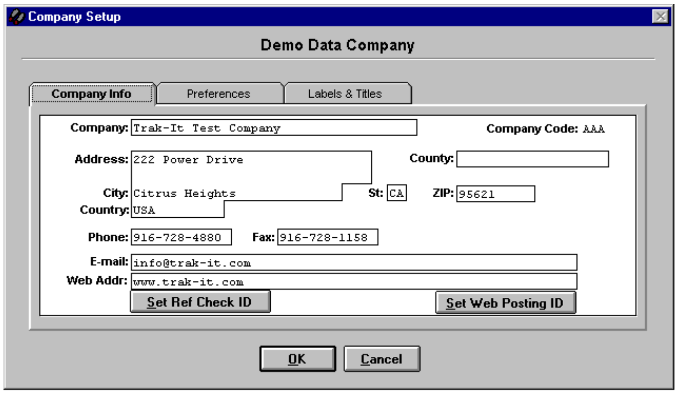
Contacts Screen



First	The first name of the contact.
Middle	The middle name of the contact.
Last	The last name of the contact.
Suffix	Any desired suffix such as Jr. or Ph.D.
Alias	Contact's alias or nickname. Alias is used in the Work Phone List. For example, Bill could be used instead of the formal name, William.
Salutation	A title such as Dr., Mr., Ms., etc. Most commonly used in custom letters. Salutation is used on letters to the contact.
Company	The company name associated with the contact.
Address Line 1	Contact's home address.
Address Line 2	2nd line of home address.
City	City.
State	Select [State] from the States Code Table.
ZIP	Contact's Zip Code.
Country	Country. Defaults to country specified on Setup screen.
E-mail Address	Contact’s E-mail address, if any.
Work	Contact's work phone number.
X	Contact's work phone extension, if any.
Fax	Contact’s fax number, if any.
Pager	Contact’s pager number, if any.
Home	Contact's home phone number.

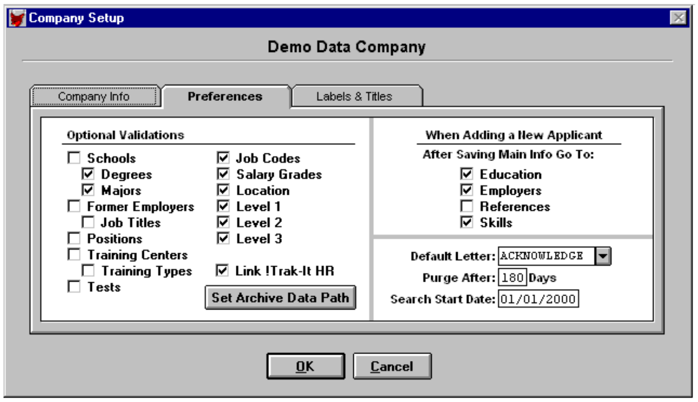
Misc1-4	User-defined miscellaneous contact data item. The title or caption displayed for this item can be changed via the Company Setup screen under Administrator on the Top Menu Bar. You can use this requisition data item to store anything you wish.
Notes	Notes pertaining to the contact.

Company Setup Screen - Company Info Tab



Name	Enter the name of your organization as you would like it to appear on report headings and on the Password Startup screen.
Address 1	The address will be used for OSHA and Workers Compensation reports.
Address 2	The address will be used for OSHA and Workers Compensation reports.
City	City. The address will be used for OSHA and Workers Compensation reports.
State	Select [State] from the States Code Table.
Zip	Zip Code.
Country	Default is USA
Company Code	The 3-digit ## company code ##.
Federal ID	Federal ID number.
County	County
Phone	Company phone number.
Fax	Company fax number.
E-mail	Company E-mail address
Web Addr	Your company's web site home page.

Company Setup Screen - Preferences Tab



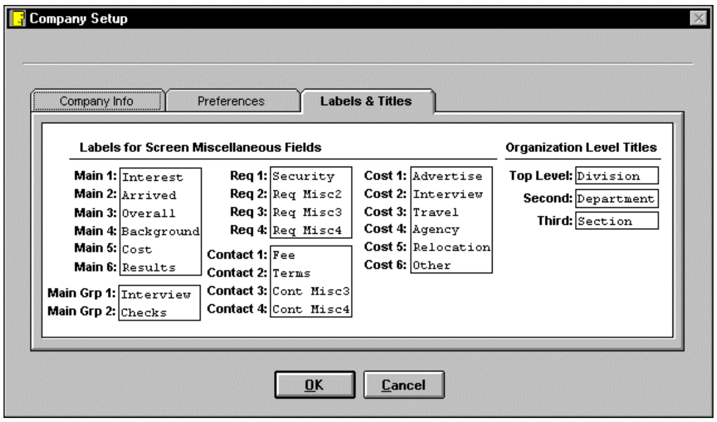
Optional Validations

Schools	Check {Schools} if you want to have schools validated.
Degrees	Check {Degrees} if you want to have degrees validated.
Majors	Check {Majors} if you want to have majors validated.
Past Employers	Check {Past Employers} if you want to have past employers validated.
Job Titles	Check {Job Titles} if you want to have job titles validated.
Positions	Check {Position} if you want to have positions validated.
Training Centers	Check {Training Centers} if you want to have training centers validated.
Training Types*	Check {Training Types} if you want to have training types validated.
Tests*	Check {Tests} if you want to have tests validated.
Job Codes	Check {Job Codes} if you want to have Job Codes validated. This will cause the Job Title, Salary Grade, EEO Class, Job Group, and Exempt status to automatically appear on the Requisition screen.
Salary Grades	Check {Salary Grades} if you want to have Salary Grades validated. This will cause the pay range and pay period to automatically appear on the Requisition screen.
Location	Check {Location} if you want to have location validated.
Level 1	Check {Level 1} if you want to have level 1 (division) validated.
Level 2	Check {Level 2} if you want to have level 2 (department) validated.
Level 3	Check {Level 3} if you want to have level 3 (section) validated.
Link !Trak-It HR	Check {Link} if you want to link !Trak-It Applicant to !Trak-It HR.

When Adding a New Applicant - After Saving Main Info ...(not available in SBE)*

Education	Check {Education} to enter education info after saving main applicant info.
Employers	Check {Employers} to enter employer info after saving education screen (or after main applicant if education screen not checked).
References	Check {References} to enter reference info after saving employers (or after education or main applicant depending on sequence established in prior two check boxes).
Skills	Check {Skills} to enter skills after saving reference info.

Company Setup Screen - Labels & Titles Tab



Labels for Screen Miscellaneous Fields

Main Applicant Screen	The Main Applicant screen has six user-defined data items. The labels for Misc1 through Misc6 are defined here. To change the labels, type over the labels currently displayed. These data items will be displayed on the right side of the Application tab of the Main Applicant screen. These labels are used for screen displays and pre-programmed reports only. The underlying field names used for the report writer or programming are listed in the Appendix B, *Data Dictionary*, and do not change.
Requisitions Screen	The Requisition screen has four user-defined data items. The labels for Req1 through Req4 are defined here. To change the labels, type over the labels currently displayed. These data items will be displayed on the bottom of the Requisition tab of the Requisition screen. They are used for screen displays and pre-programmed reports only. The underlying field names used for the report writer or programming are listed in the Appendix B, *Data Dictionary*, and do not change.

Costs Screen

The Costs screen associated with the Requisition screen has six user-defined data items. The labels for O_COST1 through O_COST6 are defined here. To change the labels, type over the labels currently displayed. These data items will be displayed on the Costs screen. These labels are used for screen displays and pre-programmed reports only. The underlying field names used for the report writer or programming are listed in the Appendix B, *Data Dictionary*, and do not change.

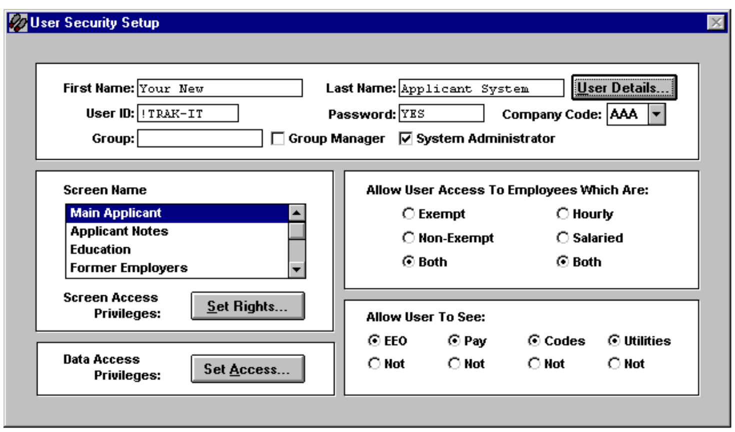
Contacts Screen

The Contacts screen has four user-defined data items. The labels for C_MISC1 through C_MISC4 are defined here. To change the labels, type over the labels currently displayed. These data items will be displayed on the bottom of the Contacts screen. They are used for screen displays and pre-programmed reports only. The underlying field names used for the report writer or programming are listed in the Appendix B, *Data Dictionary*, and do not change.

Organization Level Titles Organization Levels

!Trak-It Applicant allows for three user-defined organizational levels: *Top Level, Second, and Third*. Division, Department, and Section are the default names. To change the names, type over the name currently displayed. These organizational levels are used in various reports.

User Security Setup Screen



First Name

User's first name.

Last Name

User's last name.

User ID

User's login ID. Upon entering the User ID on the Login screen, the user's first and last name will display.

Password

User's confidential password for usage validation.

Group Manager	Check {Group Manager} if user is the manager of the Group named in the following data item. A Group Manager can establish privileges on the system for users in his group.
Group	The name of a group of applicants within the company. Used to control data access and privileges.
System Administrator	Check {System Administrator} if user is the administrator of the !Trak-It Applicant system for your company. The System Administrator has all authority and usage of the !Trak-It Applicant system, including changing the passwords of other users. There are no restrictions of data access for the System Administrator.
Screen Access Privileges	
Set Rights	After selecting the applicable data screen from the scrolling display of all possible screens, select (Full Access, Read Only, Add Only, Edit Only, Add+Edit, No User Access) to set the access rights of the user being set up.
Data Access Privileges	
Set Access	Using provided functions and data item names, establish control as to specifically what data can be accessed by the user being set up.
Other Access Privileges	
Exempt Status	Select (Exempt, Non-Exempt, Both) to determine user access to applicants' data according to their Exempt status.
Hourly	Select (Hourly, Salaried, Both) to determine user access to applicants' data according to their pay method.
EEO	Select (See EEO, Not See) to determine user access to EEO related applicant's information.
Pay	Select (See Pay, Not See) to determine user access to the applicant's pay.
Codes	Select (See Codes, Not See) to determine user access to the Code Tables.
Utilities	Select (See Utilities, Not See) to determine user access to the Change Applicant Number, Mass Update, and Archiving options on the Utilities menu.

Code Table Screens

Code Table screens are described in Chapter 4, *Understanding Code Tables*.

Appendix B
Data Dictionary

The following pages in this appendix describe the data structures for the databases used by !Trak-It Applicant. The following conventions are used in this appendix:

Field Types: (C)haracter, (D)ate, (N)umeric, (L)ogical, (G)eneral, or (M)emo

Descriptions: [Items in brackets are selected from indicated table]
(Items in parentheses are hard-coded values from a drop-down menu)
{Items in braces indicate a check box. Check if yes or true.}
** Calculated data item **
Automatically displayed
!! Internal data item, not displayed !!

ACONTACT.DBF (Contacts)

#	Field Name	Type	Width	Dec	Description
1.	FNAME	C	15		First Name
2.	MNAME	C	15		Middle Name
3.	LNAME	C	25		Last Name
4.	ALIAS	C	15		Alias
5.	SALUTE	C	15		Salutation
6.	SUFFIX	C	10		Suffix
7.	C_COMPANY	C	30		Company
8.	STREET1	C	30		Street Address 1
9.	STREET2	C	30		Street Address 2
10.	CITY	C	25		City
11.	STATE	C	3		State
12.	ZIP	C	10		Zip Code
13.	COUNTRY	C	12		Country
14.	HPHONE	C	13		Home Phone
15.	WPHONE	C	13		Work Phone
16.	EXT	C	4		Extension
17.	PPHONE	C	13		Pager
18.	FPHONE	C	13		Fax
19.	C_MISC1	C	15		Contact Misc Field 1
20.	C_MISC2	C	15		Contact Misc Field 2
21.	C_MISC3	N	10	2	Contact Misc Field 3
22.	C_MISC4	N	10	2	Contact Misc Field 4
23.	C_NOTE	M	10		Comment
24.	C_EMAIL	C	60		E-mail address
25.	CHADATE	D	8		!!Last Change Date for This Record!!
26.	COMPANY	C	3		!!Company Code!!

AEDUCATE.DBF (Schools)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	E_SCHOOL	C	40		School Name
3.	E_YEARS	N	2		Years in Attendance
4.	E_GRADYR	N	4		Year of Graduation
5.	E_DEGREE	C	10		[Degree from Degrees Code Table]
6.	E_MAJOR	C	40		[Major from Majors Code Table]
7.	E_GPA	N	5	2	Grade Point Average
8.	E_GPA_BASE	N	2		Grade Point Average of Major
9.	E_DID_GRAD	L	1		{Graduated} T=yes, F=no
10.	E_SCH_GP	C	8		[School Group from School Group Code Table]
11.	CHADATE	D	8		!!Last Change Date for This Record!!
12.	COMPANY	C	3		!!Company Code!!

EMPLOY.DBF (Former Employers Code Table)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	M_EMPLOYER	C	40		Former Employer
3.	M_FR_DATE	D	8		Start Date at Employer
4.	M_TO_DATE	D	8		End Date at Employer
5.	M_SALARY	N	10	2	Ending Salary
6.	M_PER	C	1		(Hour, Week, Bi-Week, Semi-Month, Month, Quarter, Year, Unit)
7.	M_TITLE	C	40		Job Title
8.	M_POSITION	C	40		Position
9.	M_YRS_EXP	N	2		Years of Experience
10.	M_IND_ID	C	8		[Industry ID]
11.	CHADATE	D	8		!!Last Change Date for This Record!!
12.	COMPANY	C	3		!!Company Code!!

AINVITE.DBF (Invitations)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	I_TOSEE	C	20		Interviewer
3.	I_PHONE	C	13		Interviewer Phone Number
4.	I_EXT	C	5		Extension
5.	I_EMAIL	C	60		Interviewer Email address
6.	I_LEVEL1	C	12		Org. Level 1
7.	I_LEVEL2	C	12		Org. Level 2
8.	I_LEVEL3	C	12		Org. Level 3
9.	I_LOCATION	C	12		Location

10.	I_INVDAT	D	8		Invitation Date
11.	I_TIME	C	8		Invitation Time
12.	I_COMMENT	C	40		Comment
13.	I_REQ	C	12		[Related Requisition]
14.	CHADATE	D	8		!!Last Change Date for This Record!!
15.	COMPANY	C	3		!!Company Code!!

AJOBCODE.DBF (Job Codes)

#	Field Name	Type	Width	Dec	Description
1.	CODE	C	12		Job Code
2.	DESC	C	25		Job Description
3.	HOURLY	L	1		{Hourly} T=yes, F=no
4.	EXEMPT	L	1		{Exempt} T=yes, F=no
5.	EEOCLASS	C	6		[EEO Class] from EEO Table
6.	SALGRADE	C	6		[Salary Grade]
7.	JOBGROUP	C	6		[Job Group] from JG Table
8.	LONG_DESC	M	10		Long Description
9.	CHADATE	D	8		!!Last Change Date for This Record!!
10.	COMPANY	C	3		!!Company Code!!

ALABELQ.DBF (Labels)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	LNAME	C	25		Last Name
3.	FNAME	C	15		First Name
4.	SALUTE	C	6		Salutation
5.	STREET1	C	28		Street Address line 1
6.	STREET2	C	28		Street Address line 2
7.	CITY	C	20		City
8.	STATE	C	3		State
9.	ZIP	C	10		Zip
10.	HPHONE	C	13		Home Phone
11.	EMAIL	C	60		Email address
12.	REQ_CODE	C	12		Requisition Code
13.	LETTER	C	12		Letter to Send
14.	CHADATE	D	8		!!Last Change Date for This Record!!
15.	COMPANY	C	3		!!Company Code!!

APERREQ.DBF (Applicant Requisition Records)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!

2.	REQ_CODE	C	12		Requisition Code
3.	ASSIGNDATE	D	8		Requisition Assign Date
4.	O_EEOCLASS	C	6		[EEO Class] from EE Table
5.	O_JOBGROUP	C	6		[EEO Job Group] from JG
6.	O_JOBCODE	C	10		[Job Code] from JC Table
7.	IS_CUR	L	1		*Internal (.t.= most current Record for this Requisition)*
8.	IS_MAIN	L	1		Internal {Main Requisition} T=yes, F=no
9.	CUR_STATUS	C	10		[Current Status of Req.] from Status Code Table
10.	CUR_STDATE	D	8		Current Status Start Date
11.	OFR_DATE	D	8		Date of Offer
12.	OFR_PAY	N	10	2	Offer Salary
13.	OFR_PER	C	1		(Hour, Week, Bi-Week, Semi-Month, Month, Quarter, Year, Unit)
14.	REJ_REASON	C	10		[Reject Reason] from Reason Code Table
15.	REJ_DATE	D	8		Date of Reject
16.	ACCEPTDATE	D	8		Date of Acceptance
17.	START_DATE	D	8		Start Date
18.	LTR_LAST	C	12		Letter Last Sent
19.	LTR_DATE	D	8		Date Last Letter Sent
20.	LTR_SENT	L	1		*Internal*
21.	CHADATE	D	8		!!Last Change Date for This Record!!
22.	COMPANY	C	3		!!Company Code!!

APERSNL.DBF (Main Applicant Record)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	FNAME	C	15		First Name
3.	MNAME	C	15		Middle Name
4.	LNAME	C	25		Last Name
5.	ALIAS	C	15		Alias
6.	SALUTE	C	6		Salutation
7.	SUFFIX	C	10		Suffix
8.	STREET1	C	30		Street Address 1
9.	STREET2	C	30		Street Address 2
10.	STREET3	C	30		Street Address 3
11.	CITY	C	25		City
12.	STATE	C	3		[State] from ST Table
13.	ZIP	C	10		Zip Code
14.	COUNTRY	C	12		Country
15.	HPHONE	C	13		Home Phone
16.	WPHONE	C	13		Work Phone
17.	EXT	C	4		Extension
18.	PPHONE	C	13		Pager
19.	FPHONE	C	13		Fax

20.	EMAIL	C	60		E-mail Address
21.	SSN	C	11		Social Security Number
22.	BIRTHDATE	D	8		Birth Date
23.	DRV_LIC_NO	C	16		Driver's License Number
24.	DRV_LIC_ST	C	2		Driver's License State
25.	DRV_LIC_EX	D	8		Driver's License Expires
26.	SEX	C	1		Gender (Male, Female, Unknown)
27.	RACE	C	1		(A,B,H,I,W,U)
28.	DISABLED	L	1		{Disabled} T=disabled, F=not disabled
29.	VIET_VET	L	1		{Viet Veteran) T=Viet vet, F=not Viet vet
30.	OTH_VET	L	1		{Other Veteran}) T= is vet, F=not vet
31.	MILITARY	L	1		{Military Veteran} T= vet, F=not vet
32.	DISABL_VET	L	1		{Disabled Veteran}T=disabled vet, F=not disable vet
33.	CITIZEN_OF	C	6		Country
34.	ALIENNUM	C	15		Alien Number
35.	RECRUITER	C	12		[Recruiter] from Recruiter Code Table
36.	SOURCE	C	6		[Referral Source] from Referral Source Code Table
37.	REFFEREDBY	C	15		Referred by
38.	POSITION	C	30		[Position Desired] from Positions Code Table
39.	EMPLOY	C	3		[Job Type] from Job Types Code Table
40.	DESPAY_MIN	N	10	2	Desired Pay Minimum
41.	DESPAY_MAX	N	10	2	Desired Pay Maximum
42.	DESPAY_PER	C	1		Pay Period for Desired Pay
43.	WILL_RELOC	L	1		{Relocate} T=yes, F=no
44.	RELOCAT_TO	C	20		Relocation Area
45.	REL_COMNT	C	60		Relocation Comment
46.	MISC1	C	15		Main Applicant Misc Field 1
47.	MISC2	C	15		Main Applicant Misc Field 2
48.	MISC3	C	15		Main Applicant Misc Field 3
49.	MISC4	C	15		Main Applicant Misc Field 4
50.	MISC5	N	10	2	Main Applicant Misc Field 5
51.	MISC6	C	15		Main Applicant Misc Field 6
52.	APPL_DATE	D	8		Date Applied
53.	PURGE_DATE	D	8		Date to Purge Application
54.	CUR_STATUS	C	10		[Status Code] from Status Code Table
55.	CUR_STDATE	D	8		Current Status Effective Date
56.	REJ_REASON	C	10		[Reject Reason] from Reason Code Table
57.	REJ_DATE	D	8		Rejection Date
58.	LTR_LAST	C	12		Last Letter Name
59.	LTR_DATE	D	8		Date Last Letter Sent
60.	LTR_SENT	L	1		*Internal* T=letter was sent
61.	OFR_POS	C	30		Description of Job Offered
62.	OFR_REQ	C	12		Requisition ID
63.	OFR_SUPVSR	C	25		Supervisor
64.	OFR_PAY	N	10	2	Offer Pay

65.	OFR_PER	C	1		(Hour, Week, Bi-Week, Semi-Month, Month, Quarter, Year, Unit)
66.	OFR_DATE	D	8		Offer Date
67.	ACCEPTDATE	D	8		Accept Date
68.	START_DATE	D	8		Start Date
69.	ADA_ACCOM	C	40		American Disability Act Accommodation
70.	STAT_COMT	C	40		Status Comment
71.	MAIN_MEMO	M	10		Log of status and Req changes for applicant
72.	IS_EMP	L	1		{Employee} T=yes, F=no
73.	CHADATE	D	8		!!Last Change Date for This Record!!
74.	COMPANY	C	3		!!Company Code!!

AREFER.DBF (References)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	F_NAME	C	30		Name of Reference
3.	F_PHONE	C	13		Phone Number of Reference
4.	F_EXT	C	5		Extension
5.	F_EMAIL	C	60		Email of reference
6.	F_COMMENT	C	60		Comment
7.	F_REF_TYPE	C	1		[Referral Type] from Referral Type Table
8.	CHADATE	D	8		!!Last Change Date for This Record!!
9.	COMPANY	C	3		!!Company Code!!

AREQREQ.DBF (Requisition Requirements)

#	Field Name	Type	Width	Dec	Description
1.	REQ_CODE	C	12		!!Requisition ID!!
2.	TABLE	C	2		!!Code Table Code for the Requirement!!
3.	CODE	C	40		[Requirement from associated code table]
4.	DESC	C	40		##Requirement Description from Code Table##
5.	PRIORITY	N	1		*Internal*
6.	IMPORTANCE	N	2		Rank of this Requisition, 1 = most important
7.	CHADATE	D	8		!!Last Change Date for This Record!!
8.	COMPANY	C	3		!!Company Code!!

AREQUIS.DBF (Requisitions)

#	Field Name	Type	Width	Dec	Description
1.	REQ_CODE	C	12		Requisition Code
2.	REQ_TITLE	C	25		Requisition Title
3.	O_RECRUIT	C	12		[Recruiter] from the Recruiters Code Table
4.	O_OPNDATE	D	8		Open Date

5.	O_NEEDDATE	D	8		Need by Date
6.	O_CLSDATE	D	8		Closed Date
7.	O_CUR_STAT	C	10		[Current Status] from Status Code Table
8.	O_CUR_DATE	D	8		Status as of Date
9.	O_REASON	C	25		Reason for Opening
10.	O_NUM_OPEN	N	4		Number of Openings
11.	O_NUM_FILL	N	4		Number Currently Filled
12.	O_FILLDATE	D	8		Filled as of Date
13.	O_FILLEDBY	C	25		Applicant Filling Position
14.	O_SUPLEVEL	C	40		Supervisor Organization
15.	O_SUPNAME	C	25		Supervisor Name
16.	O_SUPPHONE	C	18		Supervisor Phone Number
17.	O_SUPEMAIL	C	60		Supervisor Email
18.	O_MGRLEVEL	C	40		Manager Organization
19.	O_MGRNAME	C	25		Manager Name
20.	O_MGRPHONE	C	18		Manager Phone Number
21.	O_MGREMAIL	C	60		Manager Email
22.	O_LOCATION	C	12		[Location] from Location Code Table
23.	O_MINSAL	N	10	2	Pay Minimum Range
24.	O_MAXSAL	N	10	2	Pay Maximum Range
25.	O_PERIOD	C	1		(Hour, Week, Bi-Week, Semi-Month, Month, Quarter, Year, Unit)
26.	O_JOBCODE	C	10		[Job Code] from Job Code Table
27.	O_JOBTITLE	C	25		[Job Title] from Job Code Table
28.	O_SALGRADE	C	6		##Salary Grade from Job Code Table##
29.	O_HOURLY	L	1		{Hourly Position} T=yes, F=no
30.	O_EXMPT	L	1		{Exempt Position} T=yes, F=no
31.	O_DIRECT	L	1		{Direct Position} T=yes, F=no
32.	O_EMPLOY	C	3		[Job Type] from Job Type Table
33.	O_EEOCLASS	C	6		[EEO Class] from Job Code Table
34.	O_JOBGROUP	C	6		[Job Group] from Job Code Table
35.	O_WHY_OPEN	C	40		Why Requisition?
36.	O_MISC1	C	15		Requisition Misc Field 1
37.	O_MISC2	C	15		Requisition Misc Field 2
38.	O_MISC3	N	10	2	Requisition Misc Field 3
39.	O_MISC4	C	15		Requisition Misc Field 4
40.	O_COST1	N	10	2	Cost Misc Field 1
41.	O_COST2	N	10	2	Cost Misc Field 2
42.	O_COST3	N	10	2	Cost Misc Field 3
43.	O_COST4	N	10	2	Cost Misc Field 4
44.	O_COST5	N	10	2	Cost Misc Field 5
45.	O_COST6	N	10	2	Cost Misc Field 6
46.	IS_ON_WEB	L	1		{Publish on Web?} T=yes, F=no
47.	REQ_DESC	M	10		Requirement Description
48.	REQ_CATGRY	C	25		[Requisition Category] from RC Code Table

49.	REQ_REQMNT	M	10		Requisition Requirements
50.	COMPANY	C	3		!!Company Code!!
51.	CHADATE	D	8		!!Last Change Date for This Record!!

ARESUME.DBF (Resume)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	RESUME	M	10		Resume Text
3.	RES_DATE	D	8		Date of Resume
4.	CHADATE	D	8		!!Last Change Date for This Record!!
5.	COMPANY	C	3		!!Company Code!!
6.	RESUME_IMG	G	10		!!Not used!!

AROUTE.DBF (Routing)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	R_OUT_DATE	D	8		Routed Out Date
3.	R_TO_NAME	C	30		Route to Name
4.	R_TO_PHONE	C	13		Route to Phone Number
5.	R_EXT	C	5		Route to Extension
6.	R_EMAIL	C	60		Route to Email
7.	R_LEVEL1	C	12		[Organization Level 1] from L1 Code Table
8.	R_LEVEL2	C	12		[Organization Level 2] from L2 Code Table
9.	R_LEVEL3	C	12		[Organization Level 3] from L3 Code Table
10.	R_LOCATION	C	12		Routing Address/Location
11.	R_DUE_DATE	D	8		Response Due Back Date
12.	R_IN_DATE	D	8		Actual Date of Response
13.	R_COMMENT	C	40		Comment
14.	REQ_CODE	C	12		(Requisition ID) from Requisition database
15.	CHADATE	D	8		!!Last Change Date for This Record!!
16.	COMPANY	C	3		!!Company Code!!
17.	R_RESPREAS	C	12		Response Reason from RR Code Table

ASALGRAD.DBF (Salary Grade Code Table)

#	Field Name	Type	Width	Dec	Description
1.	CODE	C	6		Salary Grade Code
2.	DESC	C	25		Description
3.	PERIOD	C	1		(Hour, Week, Bi-Week, Semi-Month, Month, Quarter, Year, Unit)
4.	MINSAL	N	9	2	Minimum Salary
5.	MAXSAL	N	9	2	Maximum Salary
6.	CHADATE	D	8		!!Last Change Date for This Record!!

7.	COMPANY	C	3		!!Company Code!!

ASETUP.DBF (Company Setup)

#	Field Name	Type	Width	Dec	Description
1.	CO_NAME	C	35		Company Name
2.	CO_STREET1	C	32		Company Street Address line 1
3.	CO_STREET2	C	32		Company Street Address line 2
4.	CO_CITY	C	28		Company City
5.	CO_STATE	C	3		Company State
6.	CO_ZIP	C	10		Company Zip Code
7.	CO_COUNTY	C	6		Company County
8.	CO_FAX	C	13		Company Fax
9.	CO_PHONE	C	13		Company Phone
10.	CO_EMAIL	C	60		Company E-mail Address
11.	CO_WWW	C	65		Company Web Address
12.	USE_LABELQ	L	1		*Internal*
13.	DEFLT_LTR	C	12		Default Letter to send when adding a New Applicant
14.	DE_IS_VALID	L	1		{Degree Validation Enabled} T=yes, F=no
15.	ED_IS_VALID	L	1		{Education Validation Enabled} T=yes, F=no
16.	JC_IS_VALID	L	1		{Job Code Validation Enabled} T=yes, F=no
17.	L1_IS_VALID	L	1		{Org. Level 1 Validation Enabled} T=yes, F=no
18.	L2_IS_VALID	L	1		{Org. Level 2 Validation Enabled} T=yes, F=no
19.	L3_IS_VALID	L	1		{Org. Level 3 Validation Enabled} T=yes, F=no
20.	LO_IS_VALID	L	1		{Location Validation Enabled} T=yes, F=no
21.	MA_IS_VALID	L	1		{Major Validation Enabled} T=yes, F=no
22.	PE_IS_VALID	L	1		{Past Employer Validation Enabled} T=yes, F=no
23.	PO_IS_VALID	L	1		{Position Validation Enabled} T=yes, F=no
24.	RQ_IS_VALID	L	1		{Requisition validation}- not used
25.	SG_IS_VALID	L	1		{Salary Grade Validation Enabled} T=yes, F=no
26.	TC_IS_VALID	L	1		{Training Center Validation Enabled} T=yes, F=no
27.	TE_IS_VALID	L	1		{Test Validation Enabled} T=yes, F=no
28.	TI_IS_VALID	L	1		{Job Titles Validation Enabled} T=yes, F=no
29.	TR_IS_VALID	L	1		*Internal*
30.	TT_IS_VALID	L	1		{Training Types Validation Enabled} T=yes, F=no
31.	PURG_DAYS	N	3		Default value for number of days after Applied Date to set Purge Date
32.	HAS_SCAN	L	1		*Internal*
33.	ADD_EDU	L	1		{Add Education when entering app}T=yes, F=no
34.	ADD_EMP	L	1		{Add Employers when entering app}T=yes, F=no
35.	ADD_REF	L	1		{Add References when entering app}T=yes, F=no
36.	ADD_SKILL	L	1		{Add Skills when entering app}T=yes, F=no
37.	ADD_TRAIN	L	1		{Add Training when entering app}T=yes, F=no
38.	USE_HR_JC	L	1		*Internal*
39.	USE_HR_SG	L	1		*Internal*

40.	USE_HR_SK	L	1	*Internal*
41.	USE_HR_LV	L	1	*Internal*
42.	USE_HR_NA	L	1	*Internal*
43.	HRDATA_DIR	M	10	!!HR Data Directory Location!!
44.	DATABCKDIR	M	10	!!Data Backup Directory Location!!
45.	RPTBCKDIR	M	10	!!Report Backup Directory Location!!
46.	ARCHIVEDIR	M	10	!!Archive Directory Location!!
47.	ARKBCKDIR	M	10	!!Archive Backup Directory Location!!
48.	TI_M_MISC1	C	10	Title for Misc Field 1 on Main Applicant Screen
49.	TI_M_MISC2	C	10	Title for Misc Field 2 on Main Applicant Screen
50.	TI_M_MISC3	C	10	Title for Misc Field 3 on Main Applicant Screen
51.	TI_M_MISC4	C	10	Title for Misc Field 4 on Main Applicant Screen
52.	TI_M_MISC5	C	10	Title for Misc Field 5 on Main Applicant Screen
53.	TI_M_MISC6	C	10	Title for Misc Field 6 on Main Applicant Screen
54.	TI_R_MISC1	C	10	Title for Misc Field 1 on Requisition Screen
55.	TI_R_MISC2	C	10	Title for Misc Field 2 on Requisition Screen
56.	TI_R_MISC3	C	10	Title for Misc Field 3 on Requisition Screen
57.	TI_R_MISC4	C	10	Title for Misc Field 4 on Requisition Screen
58.	TI_C_MISC1	C	10	Title for Misc Field 1 on Contact Screen
59.	TI_C_MISC2	C	10	Title for Misc Field 2 on Contact Screen
60.	TI_C_MISC3	C	10	Title for Misc Field 3 on Contact Screen
61.	TI_C_MISC4	C	10	Title for Misc Field 4 on Contact Screen
62.	TI_COST1	C	10	Title for Misc Field 1 on Costs Screen
63.	TI_COST2	C	10	Title for Misc Field 2 on Costs Screen
64.	TI_COST3	C	10	Title for Misc Field 3 on Costs Screen
65.	TI_COST4	C	10	Title for Misc Field 4 on Costs Screen
66.	TI_COST5	C	10	Title for Misc Field 5 on Costs Screen
67.	TI_COST6	C	10	Title for Misc Field 6 on Costs Screen
68.	TI_LEVEL1	C	10	Title for Organization Level 1
69.	TI_LEVEL2	C	10	Title for Organization Level 2
70.	TI_LEVEL3	C	10	Title for Organization Level 3
71.	TI_M_GRP1	C	10	Title for Main Applicant Group 1
72.	TI_M_GRP2	C	10	Title for Main Applicant Group 2
73.	CHECKMEMO	M	10	*Internal*
74.	SUM	N	10	*Internal*
75.	OFFSET	C	1	*Internal*
76.	SRCH_START	D	8	*Internal*
77.	CHADATE	D	8	!!Last Change Date for This Record!!
78.	COMPANY	C	3	!!Company Code!!
79.	LASTEMPNO	C	9	Last applicant number used
80.	APP_LOG	L	1	Auto Applicant Log on Status Screen .t.= On
81.	ROUFU_DAYS	N	3	Number of days expected for routing response

ASKILLS.DBF (Skills)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	S_SKILL	C	15		Skill
3.	S_YEARS	N	5	2	Years of Experience
4.	S_ASOF	D	8		As of Date
5.	S_COMMENT	C	40		Comment
6.	CHADATE	D	8		!!Last Change Date for This Record!!
7.	COMPANY	C	3		!!Company Code!!

ASYNONYM.DBF (Synonyms Code Table)

#	Field Name	Type	Width	Dec	Description
1.	TABLE	C	2		Table Code
2.	CODE	C	40		Name to Match
3.	SYNONYM	M	10		Synonyms of Item
4.	CHADATE	D	8		!!Last Change Date for This Record!!
5.	COMPANY	C	3		!!Company Code!!

ATESTS.DBF (Test Codes Table)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	U_CODE	C	12		[Test Code] from Test Code Table
3.	U_DESC	C	25		Description of Test
4.	U_TESTDATE	D	8		Date of Test
5.	U_FU_DATE	D	8		Follow-up Date
6.	U_SCORE	N	12	2	Test Score
7.	U_SCOREMAX	N	12	2	Maximum Score Possible
8.	U_RESULTS	C	1		Results (any meaningful code)
9.	U_COMMENT	C	40		Comment
10.	CHADATE	D	8		!!Last Change Date for This Record!!
11.	COMPANY	C	3		!!Company Code!!

ATRAIN.DBF (Training)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	T_SCHOOL	C	40		Training Center Name
3.	T_DESC	C	40		Training Center Description
4.	T_FROM	D	8		Attended from Date
5.	T_TO	D	8		Attended to Date
6.	T_DID_GRAD	L	1		{Earned Certificate} T=yes, F=no

7.	T_TR_CODE	C	10		[Training Code] from Training Codes Table
8.	T_CODEDESC	C	40		Training Code Description
9.	T_GOOD_TIL	D	8		Expiration Date of Certificate
10.	T_TC_GP	C	8		[Group] from Training Center Group Code Table
11.	CHADATE	D	8		!!Last Change Date for This Record!!
12.	COMPANY	C	3		!!Company Code!!

A_ANOTES.DBF (Applicant Notes)

#	Field Name	Type	Width	Dec	Description
1.	EMPNO	C	9		!!Applicant Number!!
2.	N_NOTE	M	10		The Note
3.	N_FUDATE	D	8		Follow-up Date
4.	N_RECRUIT	C	12		[Recruiter] from Recruiters Code Table
5.	N_REQ	C	12		(Requisition ID) from Requisition Database
6.	CHADATE	D	8		!!Last Change Date for This Record!!
7.	COMPANY	C	3		!!Company Code!!

A_RNOTES.DBF (Requisition Notes)

#	Field Name	Type	Width	Dec	Description
1.	R_NOTE	M	10		The Note
2.	R_FUDATE	D	8		Follow-up Date
3.	R_RECRUIT	C	12		[Recruiter] from Recruiters Code Table
4.	R_REQ	C	12		(Requisition ID) from Requisition Database
5.	CHADATE	D	8		!!Last Change Date for This Record!!
6.	COMPANY	C	3		!!Company Code!!

ATABLES.DBF (Code Tables)

#	Field Name	Type	Width	Dec	Description
1.	TABLE	C	2		!!Code Table ID!! See Below
2.	CODE	C	40		Code Value
3.	DESC	C	40		Code Table Description
4.	C1	C	2		*Internal*
5.	S1	C	1		*Internal*
6.	CAN_DELETE	L	1		*Internal*
7.	SPECIALSCX	L	1		*Internal*
8.	COMPANY	C	3		!!Company Code!!

<u>Table Code ID's</u>

CC - Countries
DE - Degrees
ED - Schools
EE - EEO Classes
EM - Status Codes
IC - Industry Codes
JC - Job Codes
JG - EEO Job Groups
JT - Job Types
L1 - Org. Level 1 Codes
L2 - Org. Level 2 Codes
L3 - Org. Level 3 Codes

LO - Locations
MA - Majors
PE - Former Employers
PO - Positions
RC - Requisition Categories
RE - Reject Reasons
RR - Routing Responses
RS - Referral Sources
RT - Referral Type
S1 - Synonyms for Degrees
S2 - Synonyms for Schools
S3 - Synonyms for Majors
S4 - Synonyms for Employers

S5 - Synonyms for Skills
S6 - Synonyms for Positions
S7 - Synonyms for Job Titles
SC - School Group Codes
SG - Salary Grades
SK - Skill Codes
ST - State Abbreviations
TC - Training Centers
TE - Test Codes
TG - Training Center Groups
TI - Job Titles
TR - Training Codes

Scan Option Data Dictionary

Note: The following data dictionary is for databases used by !Trak-It Applicant that do not contain user-accessible data, so descriptions are not given.

DBS_CODE.DBF (Scan Codes)

#	Field Name	Type	Width
1.	CODE	C	20
2.	DESCR	C	50
3.	CATEGORY	C	2
4.	DT_ADDED	D	8
5.	LST_UPDT	D	8

DBS_EDUC.DBF (Scan Education)

#	Field Name	Type	Width
1.	AP_NO	C	9
2.	SCHOOL	C	40
3.	DEGREE	C	10
4.	MAJOR	C	40
5.	DT_FROM	D	8
6.	DT_TO	D	8

DBS_EMPL.DBF (Scan Employers)

#	Field Name	Type	Width
1.	AP_NO	C	9
2.	CMPNY	C	40
3.	POSITION	C	40
4.	TITLE	C	40
5.	DT_FROM	D	8
6.	DT_TO	D	8

DBS_INIT.DBF (Scan Initialization)

#	Field Name	Type	Width
1.	SCANCOLOR	C	1
2.	S_COUNTRY	C	6
3.	S_CODE	C	12
4.	S_WRKDRV	C	64
5.	S_ALTDRV	C	64
6.	S_LOCDRV	C	64
7.	SCANPRG	C	64
8.	SCANCMD	C	64
9.	RES_EXT	C	4

10.	RES_CORR	C	64
11.	RES_LOC	C	64
12.	RES_XFER	C	64
13.	RES_TGT	C	64
14.	REM_PHONE	C	20
15.	TRAN_OPT	N	1
16.	EXTR_SKIL	L	1
17.	EXTR_EDUC	L	1
18.	EXTR_EMPL	L	1
19.	EXTR_REFS	L	1
20.	ZONE_EXT	L	1
21.	TABL_EMPL	L	1
22.	XFER_TGT	C	64
23.	EXTR_VER	C	2
24.	RES_SCRDIR	M	10
25.	RES_DOCDIR	M	10
26.	RES_AUTOAD	L	1

DBS_MAST.DBF (Scan Resume Master)

#	Field Name	Type	Width
1.	AP_NO	C	9
2.	TGT_IDNO	C	10
3.	LNAME	C	27
4.	FNAME	C	27
5.	MNAME	C	27
6.	SALUTATN	C	15
7.	H_STR1	C	30
8.	COMPANY	C	3
9.	H_STR2	C	30
10.	H_CTY	C	25
11.	H_STATE	C	3
12.	H_ZIP	C	10
13.	H_PHONE	C	24
14.	W_STR1	C	30
15.	W_STR2	C	30
16.	W_CTY	C	25
17.	W_STATE	C	3
18.	W_ZIP	C	10
19.	W_MAILST	C	31
20.	W_PHN	C	24
21.	W_FAX	C	24
22.	EMAIL	C	60
23.	POSITION	C	30

24.	SEX	C	1
25.	RACE	C	1
26.	MILITARY	C	1
27.	VIET_VET	C	1
28.	DISABL_VET	C	1
29.	RESUME	M	10
30.	DT_ADDED	D	8
31.	REVIEWED	D	8
32.	TRANSFRD	D	8
33.	LST_UPDT	D	8

DBS_REFR.DBF (Scan Reference)

#	Field Name	Type	Width
1.	AP_NO	N	9
2.	REF_NAME	C	40
3.	REF_COMP	C	40
4.	REF_PHONE	C	24

DBS_SKIL.DBF (Scan Skills)

#	Field Name	Type	Width
1.	AP_NO	N	9
2.	CODE	C	15
3.	SKILL	C	40
4.	LINE_NO	N	10

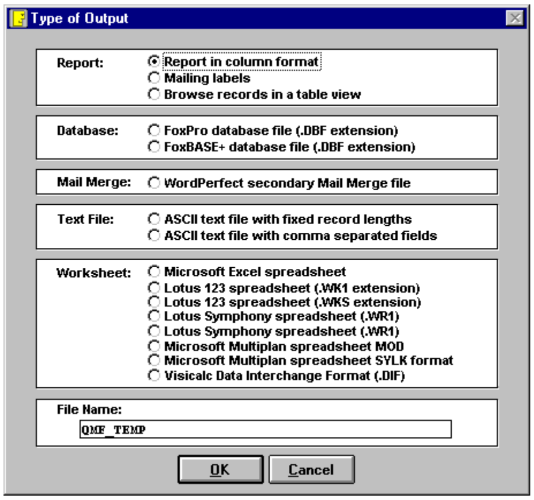
RESUME.DBF (Scan Resume Image)

#	Field Name	Type	Width
1.	TGT_IDNO	N	9
2.	LNAME	C	27
3.	RES_TEXT	M	10

Appendix C
Exporting & Importing Data

Exporting Data

Exporting data from !Trak-It Applicant can be done in one of two ways. The easiest way to export data is to create a custom query (report) that contains the data you wish to use in another application. Pick Type of Output on the main query screen to export data in a particular format.



In the Report Setup screen click on the radio button, Disk file, in the Output To portion of the screen. Refer to the chapter, *Selecting and Printing Reports* (Customize section), for more information on this selection.

Export to Yocum-Mckee

A special export to the Yocum-Mckee Analysis software is available via the Export selection under File on the Top Menu Bar. This selection creates a file that is directly read by their software.

Importing Data

Before importing data, backup your data just in case something goes wrong. To import !Trak-It HR Code Tables, pull down the File menu from the Top Menu Bar and select Import... Then select the Code Tables from the Import screen. Your HR Code Tables will be automatically imported into your !Trak-It Applicant system.

If you can get your data into a spreadsheet, it can be imported via our csv import utility. Let's say you want to import a list of Skills:

Step1 is to choose Import under File on the top menu bar and chose the Create CSV template for Skills.

Step 2 is to read the instructions.

Step 3 is to open the csv file create by Applicant in your spreadsheet system.

Step 4 is to move your data into the correct colums.

Step 5 is to save the csv file as a csv file in your spreadsheet system.

Step 6 is to choose Import under File on the top menu bar and chose the Import CSV for Skills

Importing data from existing databases requires the use of FoxPro or another software product that can update DBFs. When you use a particular database file, always check the structure of the data to be sure the field names and sizes are exactly the same as those listed in our documentation, since your !Trak-It Applicant manual and your version of the !Trak-It Applicant software could be out of sync. Remember that when you import a date, it should be in the YYYYMMDD format and each record should be of a fixed length ending with a return character.

Note: If you use Visual FoxPro, be careful to save the converted DBFs in 2.6 format.

Appendix D
System Configuration

This appendix explains the system configuration for !Trak-It Applicant.

Fonts

!Trak-It Applicant uses the following fonts: MS San Serif, Arial, Courier New

Hardware Requirements

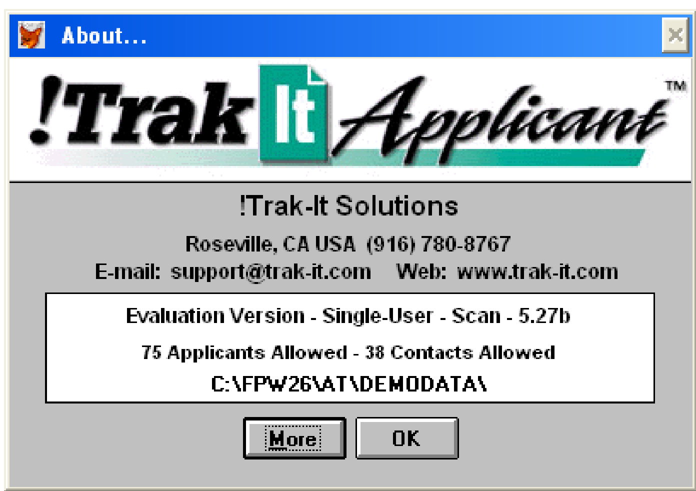
The minimum memory required is 64 megabytes of RAM. 128 megabytes of RAM or more is highly recommended. Additional memory increases the performance of !Trak-It Applicant.

Operating Systems

Windows 98, ME, NT, 2000, XP or later

About !Trak-It Applicant

If you need to know how !Trak-It Applicant is configured, you can go to the About !Trak-It Applicant dialog via the Help menu for file, disk, environment and memory information. You cannot change the information in the About !Trak-It Applicant windows; the information is displayed for informational purposes only. Choose About !Trak-It Applicant from the Help menu on the Top Menu Bar.



Notes:

Appendix E
Multi-User Network Option

The multi-user network option allows multiple users to simultaneously access !Trak-It Applicant files at the same time. If you purchased the multi-user network option, this section should be helpful in setting up your multi-user environment.

Record and File Locking

!Trak-It Applicant provides you with the maximum amount of data sharing in a multi-user network environment. In order for !Trak-It Applicant to work reliably in a multi-user environment, it has to perform three types of locks on your data. You may see passing messages appear on your screen saying that the data is locked in one of these ways:

Record Lock	When one user has a particular applicant's record locked for updating, no other user is permitted to update that applicant's record until the first update is complete. Any number of other users can be viewing or reporting on the locked record while it is being updated.
File Lock	When one user has the file locked for updating, no other user is permitted to update any information in the entire file. Any number of other users can view or report on the file while it is locked for updating.
Exclusive Database Lock	When one user has the file locked for exclusive use, all other users are locked out for all purposes. This type of lock occurs only during vital database reorganization operations such as re-indexing or adding new records.

Adding or Correcting Data

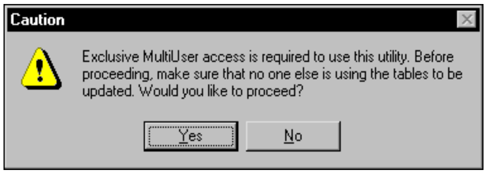
Any number of users can view, add, or correct data from the various applicant screens at the same time. However, only one user at a time is allowed to edit the data for a particular applicant. Other users can simultaneously edit data for different applicants, while still other users can add data. Users can run reports while other users are adding, correcting, or deleting data.

Reports

Reporting does not impose any file locks or record locks, except when forming a temporary index to meet the selection criteria of the desired report. The only operations that cannot be performed by other users while users are reporting are operations which require exclusive database locks such as packing and re-indexing. These same exclusive operations temporarily prevent other users from reporting or doing anything else while they are being used.

Code Tables

Editing Code Tables puts a Record Lock on the record of the code being edited. Network users will see the following Alert message asking them to be sure the tables are not in use by other users.



Clicking on the Yes button, attempts a file lock on all affected databases, and the appropriate Code Table screen is displayed for you to update. Click on the No button to cancel your request.

Utilities

Change Applicant Number	Exclusively locks on all databases. This utility will not run at all unless it can lock all databases while it is running.
Mass Update Any Field	Puts an Exclusive Database Lock on the APERSNL database and any other selected database.
Archive Applicant	Puts an Exclusive Database Lock on all applicant databases.
Retrieve Archived Applicant	Puts an Exclusive Database Lock on all applicant databases.

Administrator Utilities

Synchronize Data	Puts an Exclusive Database Lock on the APERSNL, APERREQ, and AREQUIS databases for most utilities.
Reindex	Puts an exclusive database lock on each database prior to reforming its index. If exclusive access to a particular database is not available, !Trak-It Applicant notifies the user.

Appendix F
Functions, Expressions and Record Filters

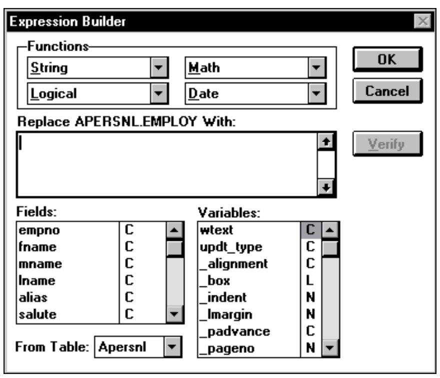
Functions, expressions and record filters can be used in the custom queries and Mass Update Any Field utility. See the appendix, *Data Dictionary*, for a description of !Trak-It Applicant's field names and their data types that can be used with these features.

Functions are an advanced feature used to manipulate your data for reporting and updating. Expressions are formulas which perform calculations and manipulate character strings and dates. Record filters are conditional expressions which filter desired records from the database. Record filters can use functions and expressions.

Rules About Data Types

Data can be one of four types: character (C), numeric (N), date (D) or Logical (L). Character data can include both letters and numbers, but you cannot perform arithmetic with numbers that are character data type until you convert them to a data type of number.

Refer to the appendix, *Data Dictionary*, for a listing of the databases, their field names and data types. In the Expression Builder screen, the field names and their data types for that database are listed in the Expression Builder screen under Field Names. The following example displays Field Names in the APERSNL database.



Functions can only operate on the appropriate data type. For example, a function that converts lower case letters to upper case won't work with a numeric data type. The data type determines how the computer can operate on the data. If a data item is the wrong type for the function, you must use another function to first change it to the correct data type. Some functions are designed to convert data types from one data type to another data type.

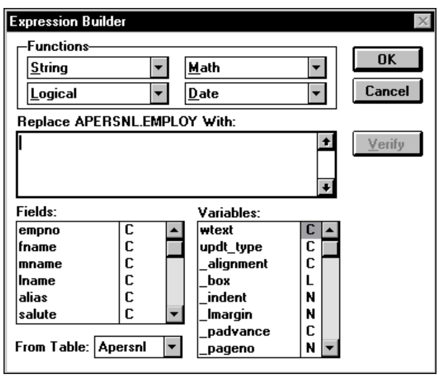
Each component of a formula or expression must have the correct data type. For example, you cannot add a numeric data type to a character data type. You must use a function to first change the character data type to a number then add the values. If they are both numbers, they will be mathematically added together. If they are both characters, the second group of characters (called a string) will be added onto the end of the first character string.

When forming expressions and record filters, you must follow certain conventions to distinguish character, numeric and date data:

- Character data must be enclosed in either single or double quotation marks. If you begin with a single quotation mark, you must end with a single quotation mark. If you begin with a double quotation mark, you must end with a double quotation mark.
- Numeric data does not require quotation marks.
- Dates in character form must be turned into valid dates before you can use them in date arithmetic. The CTOD() function will accomplish this for you. For example, CTOD("01/01/2000")+180 takes the character date, converts it to 01/01/2000 date type, then adds 180 days and returns a date of 06/29/2000.

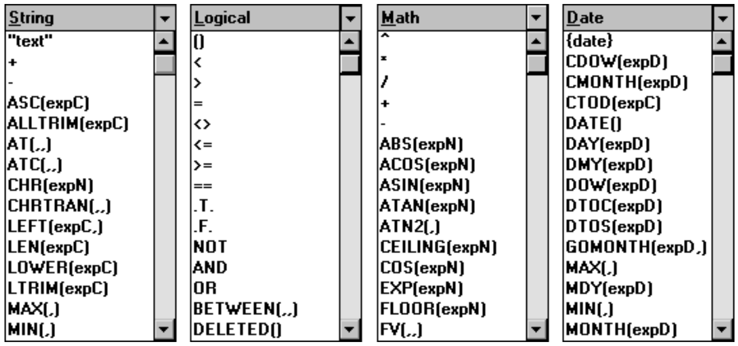
Calculated Values

Calculated values are usually based on a calculation that involves at least one database field. Calculated values are created with a formula you design that consists of database fields, memory variable, constants, and functions connected by operators. Calculated values allow you to manipulate output data. When you are designing a custom report, letter or label, calculated values can be entered directly into the Expression Builder screen.



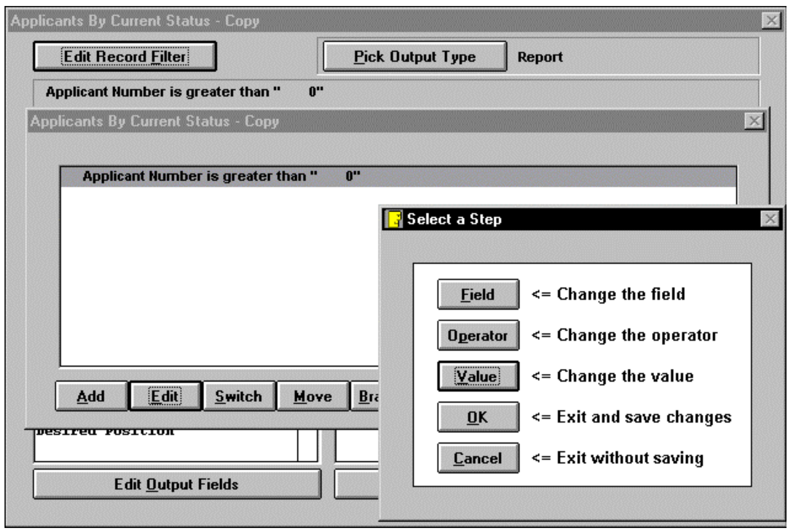
Some of the functions and operators are displayed in the pull-down menus on the Expression Builder screen. Click on the String, Logical, Math, or Date fields to display and select options in these functions.

The following four drop-down menus are displayed by clicking on the corresponding function field on the Expression Builder screen.



String *Logical* *Math* *Date*

Use the scroll bar at the right to access further selections. The most commonly used items will be described in more detail later in this appendix.



Calculated values can also be entered into the record filter screen when generating a report and selecting Custom Queries from the Reports menu. Refer to the manual, *Custom Report Guide*, for more information about this screen.

Expressions

Expressions are formulas that perform calculations and manipulate data. For example, you might want to add the contents of two different data items together. Expressions use arithmetic operators:

- + addition
- - subtraction
- * multiplication
- / division

You can have expressions that use character, numeric or date data. An example of adding two character data types together is fname+" "+lname (the first name, a space and a last name). Numeric expressions are simply mathematical formulas. For example, 1 + 1 returns 2 and ANNUAL() / 2080 returns hourly salary.

You can add or subtract days from a date. For example:

PURGE_DATE+30 Adds 30 days to an applicant's purge date.

(DATE()-S_ASOF)/365.25 The applicant's skill as of date is subtracted from today's date and divided by 365.25. This would return the number of years of experience the applicant has for the skill.

Record Filters

Record filters are conditional expressions that determine which records will be selected from the database. You can combine functions and expressions along with relational and logical operators to form record filters. You can use the following:

Relational operators:

=	Equal to	>	Greater than	<	Less than
>=	Greater or equal to	<=	Less or equal to	<>	Not equal to

Logical operators:

()	Parentheses - used to group expressions
.AND.	And condition
.OR.	Or condition
.NOT.	Not condition
.NOT.DELETED()	Any records flagged to be deleted will not be included.

If you have more than one condition to be met, they must be separated by .AND. or .OR. or .NOT. The periods around AND, OR and NOT are required. You can use parentheses to control the order of evaluation of complex criteria. This can become important when you are linking a lot of conditions together with AND's and OR's. Refer to the Examples section in this appendix on using logical operators.

Functions

Functions consist of a command and an argument list. The argument list may contain nothing, one argument or multiple arguments. The following most commonly used functions are described in this appendix:

- Date and Time
- Numeric
- Text-Oriented
- Page Number
- Special
- IIF Logical Functions

Date and Time Functions

The following functions allow you to generate and manipulate date and time data.

CDOW(*date*)	Returns the day's name for a specified date. If the system date is October 1, 2000, CDOW(DATE()) would return the name of the day, Wednesday.
CMONTH(*date*)	Returns the month's name for a specified date. If the system date is November 1, 2000, CMONTH(DATE()) would return November.
CTOD(*date*)	Changes a valid Character string to a Date. This must be done if you want to do date arithmetic or store data into a date data item. For example, APPL_DATE > CTOD("10/05/2000") would return all applicants that have an application date greater than October 5, 2000. Notice the date must have quotation marks.
DATE()	Returns the current system date. No arguments are required; therefore, there is nothing in the parentheses. (DATE()-S_ASOF)/365.25 calculates an applicant's skill experience in years. Two dates are subtracted to get the number of days. Notice the subtraction is enclosed in parentheses to calculate its value before the division. The number of days is divided by 365.25 to get the number of years.
DAY(*date*)	Returns a numeric day of the month for a specified date. If the applicant's purge date is November 1, 2000, DAY(PURGE_DATE) would return 1.

DOW(*date*)	Returns a numeric day of the week for a specified date (1 through 7, Monday would = 2). DOW("11/18/2000") would return 3.
DTOC(*date*)	Changes a Date to a Character string in the format MM/DD/YY. This must be done if you want to manipulate the date with character functions or store the date into a Character type data item. For example, LNAME + FNAME + DTOC(APPLDATE), would return a last name, first name and application date in a custom report.
MONTH(*date*)	Returns a numeric month for a specified date. If the applicant's ACCEPTDATE was 11/11/2000, MONTH(ACCEPTDATE) would return 4.
TIME()	Returns the current system time. Note there is nothing in the parentheses.
YEAR(*date*)	Returns the year corresponding to a date. If the applicant's skill as of date was 01/11/1985, YEAR(S_ASOF) would return 1985.

Numeric Functions

INT(*num*)	Converts a number to its integer by removing the decimal digits. INT(1000.24) would return 1000.
MAX(*num1,num2*)	Returns the highest value between two specified numeric or data type expressions.
MIN(*num1,num2*)	Returns the lowest value between two specified numeric or data type expressions.
ROUND(*num1,num2*)	Rounds a numeric expression to a specified number of decimal places. If the applicant's offered pay is $1,234.56:

ROUND(PAY_OFFRD,-2)	1200
ROUND(PAY_OFFRD,-1)	1230
ROUND(PAY_OFFRD,0)	1235
ROUND(PAY_OFFRD,1)	1234.6
ROUND(PAY_OFFRD,2)	1234.56

VAL(*char*)	Changes a valid Character string to a Numeric data type. This must be done if you want to do calculations with it or store it into a Numeric data item. If you have entered stock options in MISC3 (which is a character field) and now want to be able to add up all the stock for a range of applicants,

VAL(MISC3) will convert a character field to a numeric field so that the system can perform addition.

Text-Oriented Functions

The following functions can be used to perform special text output formatting.

LEFT(*char*, *num*)	Returns a given number of characters, starting from the character on the left of a character string. LEFT(ZIP,5) would return the first 5 digits of the ZIP code. If the ZIP code does not have the last 4 digits after the hyphen, this would remove the hyphen. If the ZIP code is 95124-2347, this would display only 95124. If the ZIP code is 95124-, this would display 95124.
LOWER(*char*)	Converts all characters in a string to lower case letters. LOWER(FNAME) returns the first name in lower case letters. If you have entered your applicants in all caps, the use of UPPER() and LOWER() is very useful. For example, UPPER(LEFT(LNAME,1 +LOWER(RIGHT(LNAME, 24)) would upper case the first character of the last name and lower case the remainder of the last name.
LTRIM(*char*)	Removes the leading blanks from a specified character string.
RIGHT*(char,num)*	Returns the portion of a character string starting at the right-most character and then to a specified number of characters to the left. If you had entered your applicants' names in all caps, UPPER(LEFT(FNAME,1))+LOWER(RIGHT(FNAME,13)) would change the first name to upper and lower case (the first character of the first name would be upper case and the reminder of the characters would be lower case).
RTRIM(*char*)	Removes the trailing blanks from the specified character string. Is the same as TRIM().
SPACE(*num*)	Returns a character string composed of a specified number of spaces.
STR(*num,L,D*)	Returns the character string equivalent of a numeric expression. Num is the Numeric data item or expression. L is the desired length of the resulting character string. D is the desired number of decimal places.
SUBSTR(*char,N1,N2*)	Returns a given number of characters from the character expression. Char is the name of the character data field from

	which you want to extract data. N1 is the position of the first character that you want to extract and N2 is the position of the last character you want to extract. N1 and N2 are options. If N2 is used, N1 must also be used. If your department codes are SALES-1, SALES-2 and SALES-3 and you want a report for all applicants in the sales department, enter SUBSTR(O_LEVEL2,1,4) = "SALES".
TRANSFORM(*data,format*)	Converts any type of data to the formatted character data specified in Format. This function does not work in a Group Footer band. Data is the data you want to transform into a specific format.
TRIM(*char*)	Removes the trailing blanks from the given character string. Is the same as RTRIM. TRIM(FNAME)+" "+LNAME returns a first name, a space, and a last name. There is a space between the two quotes. If the trailing blanks are not TRIM(ed), the output may not be as you expect. When the output text is right justified, the trailing blanks are included in the data field. When the field is right aligned, the last blank space aligns to the right, not the last character from the field.
UPPER(*char*)	Converts all lower case characters in a string to upper case letters. See LOWER() for an example of using UPPER() and LOWER(). UPPER(CMONTH(DATE())) would return the system month in all caps.

Page Number Function

The following function can be used in reports to automatically print page numbers:

PAGENO()	Returns the current page number for a report. Refer to the manual, *Custom Report Guide*, for an example of adding a page number to a custom report.

Special !Trak-It Applicant Functions

The following special !Trak-It Applicant functions allow you to generate and manipulate dates, calculated values, and formats. If you select the Verify button on the Expression Builder screen, it will not recognize any of the special !Trak-It Applicant functions. Ignore the message.

CHARDATE()	Returns the current month and a space, day, a comma and a space, and year. Note there is nothing in the parentheses. For example, entering CHARDATE() in the Expression Builder screen would display the date in the format of November 26, 1997. Other date functions are located in the Expression Builder screen under the Math function.
NAMES()	Returns the first name and a space, middle initial and a period and space, and last name. For example, John E. Smith. Note there is nothing in the parentheses. You can use the following functions to specify a different format for applicant names.

NAMES(1)	=	John E. Smith - same as NAMES()
NAMES(2)	=	John Smith
NAMES(3)	=	J. E. Smith
NAMES(4)	=	J. Smith
NAMES(5)	=	Johnny Smith (uses nickname)
NAMES(6)	=	Smith, John
NAMES(7)	=	Smith, J.
NAMES(8)	=	Smith, J. E.
NAMES(9)	=	Smith, John E.
NAMES(10)	=	SMITH, JOHN E.
NAMES(11)	=	Mr. John E. Smith

IIF Functions

IIF function (Immediate If) returns one of two values based on a logical expression.

IIF*(Test, True, False)*	If the first test or criteria is true, it returns the True value, otherwise it returns the False value. For example: IIF(SEX='M','Mr.','Ms.'). If the sex is male then return Mr., otherwise return Ms. The True and False can be any valid value or expression .

Note: Be careful when entering IIF Functions. It is IIF not IFF.

Examples of Functions, Expressions and Record filters

The fields must be exactly as you have entered into the fields or code tables. Capitalization is very important. For example, if SALES is upper case as a Level 2 (Department) Code Table, “Sales” is not equal to “SALES”. Whereas UPPER(Sales) is equal to SALES.

O_RECRUIT=“JAMES”	Returns all requisitions from recruiter JAMES. Note the quotes for character data.
MISC4=2500	Returns all applicants that have 2500 in the MISC4 field. Note that quotes are not required for numeric data.
APPL_DATE <= CTOD(“12/31/2000”)	Returns all applicants that have an application date less than or equal to 12/31/2000. Note the use of the CTOD function for dates.
APPL_DATE >=CTOD("01/01/2000") .and. APPL_DATE <=CTOD("12/31/2000")	Returns all applicants with an application date in 2000.
(OFR_PAY> 5 .AND. OFR_PAY < 10) .AND. OFR_PER=“H”	Returns all applicants whose offered pay is greater than 5 and less than 10 and have H in the OFR_PER field. If all applicants do not meet all three criteria, they will not be included.
O_JOBCODE= “SALESREP” .AND. APPL_DATE >= CTOD(“01/01/2000”)	Returns all applicants with a job code of SALESREP and an application date greater than or equal to 01/01/2000).
O_JOBCODE='ENGINEER' .AND. (CUR_STATUS=“OFFER” .OR. CUR_STATUS= “CONSIDER”)	Returns all applicants that have a job code of ENGINEER whose current status is OFFER or CONSIDER.
EMPLOY ="RFT".AND. (POSITION ="Clerical".OR. POSITION="Accounting").AND. APPL_DATE >=CTOD("03/31/2000").AND. APPL_DATE <=CTOD("06/30/2000")	This is an example of using the .or. logical operator and the .and. logical operator with the CTOD function and the use of parentheses. This would return all applicants with a job type code of RFT, that have a position code of clerical or accounting and have effective dates between two dates.
IS_ON_WEB=“T”	Returns all requisitions published on web.

CITY = "Sunnyvale"	Returns Sunnyvale as the home city. Note that Sunnyvale is upper and lower case. Sunnyvale was entered as upper and lower case into !Trak-It Applicant. If CITY= "SUNNYVALE" was entered, !Trak-It Applicant would not have found any records.
EMPNO>"0"	Returns all applicants.
LEFT(ZIP,5)	Returns the first 5 digits of the ZIP code.

Notes:

Appendix G
Trouble Shooting

If the following messages and/or situations occur, this appendix provides possible solutions or remedies.

Position is Off Screen

This error message can appear when !Trak-It Applicant is not compatible with your computer's video card. The problem is solved by choosing the default SVGA or VGA driver that comes with Windows or if you are using Windows, go under Monitor in the Control Panel and change font size to small.

Information doesn't seem to be there, but I know I entered it

Try reforming the indexes by pulling down the Administrator menu from the Top Menu Bar and selecting Reindex. This often takes care of the problem.

Text does not appear when I generate a custom report, letter, or label

You may have designed a custom report, letter or label with a text block that has too many characters. Text cannot be longer than 254 characters (approximately 3 lines). Refer to the manual, *Custom Report Guide*, for more information on entering text.

File does not exist

In a single user system, a user attempting to access data already in use by someone else will get this message. License the multi-user system so multiple users can access !Trak-It Applicant at the same time.

What do I do if my system crashes?

If you have lost the application and your data, re-install !Trak-It Applicant and restore your data files from the your most recent backup. The importance of backing up your data on a regular basis cannot be over emphasized. Refer to the Backup to Sub Dir and Restore from Sub Dir sections in the chapter, *Utilities and Administrator*, for more information.

Record out of range

Pull down the Administrator Menu and select Reindex for both data and reports.

Resource Not Found

Put the FoxUser files in the same folder as the !Trak-It Applicant application. !Trak-It Applicant cannot run without the FoxUser files (FoxUser.dbf and FoxUser.fpt).

Fields do not display in Page Preview when designing a custom report, letter or label

You might have a blank record in your database. Select the Next button on the Page Preview screen to see the next record. Or one of your fields might be touching one of the heavy black lines on the Layout grid screen. Either re-size the fields, change the font size, or move the field until it does not touch any of the heavy black lines.

End of File Encountered

Pull down the Administrator Menu and select Reindex.

Missing Operand

Missing operand usually means a typo in a User Defined Criteria, a missing parentheses or missing quotation mark.

Out of Disk error message

Your hard disk is full. Remove all the TEMP files on your hard disk (usually in c:\temp). Remove any other files that are no longer needed on your hard disk. Restart !Trak-It Applicant.

Reports with Demodata work but not with My Company's Data

You accidentally backed up your reports into your HRData folder. Call !Trak-It Technical Support to help you move files into the correct sub folders.

Appendix H
Standard Reports List

The following is a listing of !Trak-It Applicant standard reports available at the time of the printing of this User's Manual. This listing may not be in sync with your actual Reports menu depending on the program version you are currently using.

Activity Analysis Reports

Activity Analysis - by Recruiter
Activity Analysis - by Requisition
Activity Analysis - by Source
Activity Analysis - Hire Statistics
Activity Analysis - Hire Statistics (Detail)

Affirmative Action Reports

Adverse Impact- Applied vs. Hired
Adverse Impact- Applied vs. Hired (Detail)
Adverse Impact- Applied vs. Interviewed
Adverse Impact- Applied vs. Interviewed (Detail)
Adverse Impact- Applied vs. Offered
Adverse Impact- Applied vs. Offered (Detail)
Adverse Impact- Interviewed vs. Hired
Adverse Impact- Interviewed vs. Hired (Detail)
Adverse Impact- Interviewed vs. Offered
Adverse Impact- Interviewed vs. Offered (Detail)
Adverse Impact- Offered vs. Hired
Adverse Impact- Offered vs. Hired (Detail)
Applicant Analysis by EEO Class
Applicant Analysis by EEO Class (Detail)
Applicant Analysis by Position
Applicant Analysis by Recruiter
Applicant Analysis by Reject Reason
Applicant Analysis by Source
Applicant Analysis by Status
Unknown Determinants (Missing Information)

Applicant Background

Applicant Statistics
Applicant Census
Applicant Statistics (Detail)
Applicant's Profile
Applicant's Education
Applicant's Former Employers
Applicant's History
Applicant's Invites
Applicant's Main Information
Applicant's Notes
Applicant's References
Applicant's Resume
Applicant's Routing
Applicant's Skills
Applicant's Tests
Applicant's Training

Applicant Information Reports

Applicant Listing
Applicants by Applied Date
Applicants by Current Status
Applicants by Current Status for Position
Applicants by Employment Type
Applicants by Job Code
Applicants by Main Requisition
Applicants by Name
Applicants by Number
Applicants by Position Desired
Applicants by Recruiter
Applicants by Reject Reason
Applicants by Source
Applicants by Source/Employment Type
Applicants with Event Log
Applicants with Home Address & Phone Envelope #10 for Applicants Labels for Applicants

Code Tables

A List of Code Tables
Job Codes List
Job Codes with Descriptions
Salary Grades
Synonyms
All Other Code Tables

Contacts

Contacts - Addresses
Contacts - Company List
Contacts - Phone List
Contacts - Profile

Costs of Hire Reports

Cost of Hire - by Requisition
Cost of Hire - Total

Invitation Schedules Reports

Interviewer's Schedule
Invitation List - For One Applicant
Invitation List - Master
Invitation Schedule - One Applicant
Invitations by Requisition

Follow-Up Reports

Follow-Up Applicants - by Applicant
Follow-Up Applicants - by Recruiter
Follow-Up Applicants - by Requisition
Follow-Up Requisitions - by Recruiter
Follow-Up Requisitions - by Requisition

Requisition Analysis Reports

Requisition Analysis - Applicant Ratios
Requisition Analysis - Applicant Ratios (Detail)
Requisition Analysis - Closed
Requisition Analysis - Diverse Statistics
Requisition Analysis - Diverse Statistics (Detail)
Requisition Analysis - Filled
Requisition Analysis - Offers Pending
Requisition Analysis - On Hold
Requisition Analysis - Open by Requisition
Requisition Analysis - Open by Supervisor

Requisition Information Reports

- List of Requisitions
- Requisitions & Associated Applicants
- Requisitions & Job Requirements
- Requisitions & Requisition Notes
- Descriptions & Requirements to Publish
- Requisitions - Profile
- Requisitions - by Level 1 - Manager (Div)
- Requisitions - by Level 2 - Supervisor (Dept)
- Requisitions - by Location
- Requisitions - by Recruiter

Routing and History Reports

- History by Req of Status Changes & Letters
- History of Applicant's Letters Sent
- History of Applicant's Status Changes
- Routing by Requisition
- Routing by Reviewer

Search for Reports

- Search for Address or Home Phone
- Search for Education - Degrees
- Search for Education - Major
- Search for Education - School Group
- Search for Education - School Name
- Search for Former Employer
- Search for Former Employer - Industry Code
- Search for Former Employer - Job Title
- Search for Reference
- Search for Skill
- Search for Test
- Search for Training - Center Group
- Search for Training - Center Name
- Search for Training - Type of Training

Notes:

Appendix I
Small Business vs. Standard Edition

Feature / Edition	**SBE**	**Standard**
Number of Applicants	Unlimited	Unlimited
Single User	x	x
Multi User	Option	Option
Archive		x
Email		x
Reference Checking	x	x
Note Queue		x
Report Queue		x
Screens		
Main Applicant	x	x
Application	x	x
Status	x	x
Applicant Notes		x
Resume	x	x
Background		
Education	x	x
Former Employers	x	x
Skills	x	x
Training		x
References		x
Tests		x
Invites		x
Routing		x
Requisition	x	x
Requirements	x	x
Costs	x	x
Job Description	x	x
Publish	x	x
Requisition Notes		x
Contacts		x
Code Tables	x	x
Options		
Scan/Extract	x	x
Web Interface	x	x

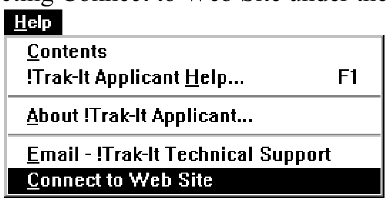
Notes:

Appendix J
Web Connections

!Trak-It Applicant has built in connections to 3 categories of web sites: !Trak-It Solutions, HireHelper.com and WhoToChoose.com. More sites will be added in future editions of Applicant.

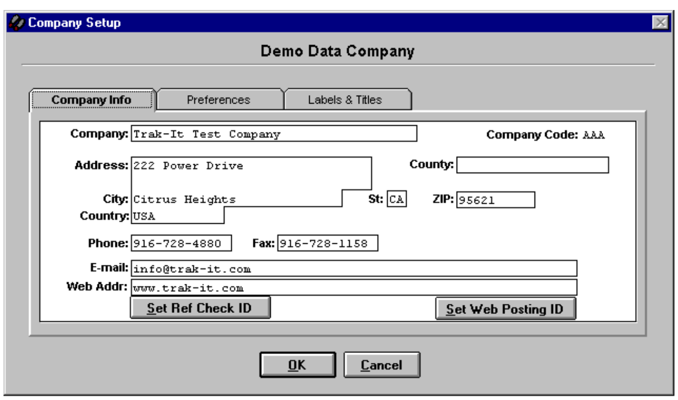
!Trak-It Solutions Home Page

Selecting Connect to Web Site under the Help Menu connects you to the !Trak-It Solutions home page.

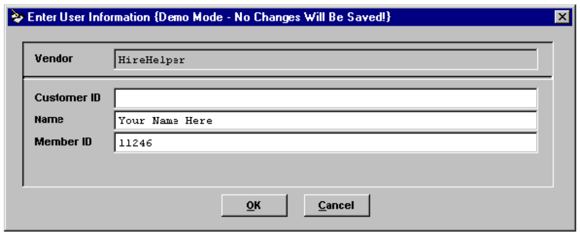


Setting Up Web Connection Accounts

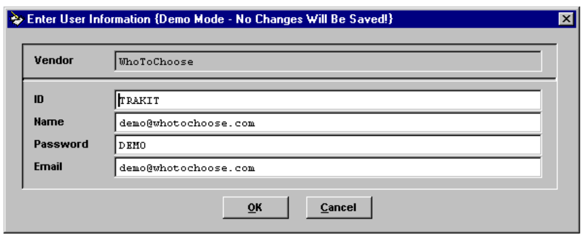
There are currently two types of web connections built into !Trak-It Applicant: Background Checks of individual applicants and Job Posting of your job requisitions. The former is accessed via the Background or Reference Check button at the bottom of the Main Applicant screen; the latter via the Post Job button on the Publish screen accessed via the Requisition screen. Before using either service you must set up an account with that service. To set up an account you must be accessing My Company's Data, then attempt to do a background check or post a job opening. The services will detect that you don't have an account with them and will have you fill out an on-line form to set one up. They will then email you your account numbers, IDs etc. which in turn need to be entered into the appropriate place in !Trak-It Applicant via the Company setup screen.



Once you have received the email with your HireHelper.com ID's, click on the Set Ref Check ID button to enter your Customer ID and Member ID along with your name, then click OK. Now when you go to do a background check, your request will be processed immediately as shown below.

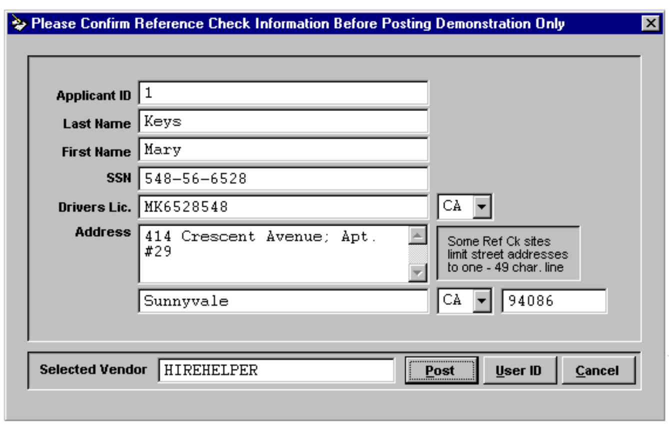


Similarly, to set up a job posting account, attempt to post a job. Fill out the online form and when you receive your ID's from WhoToChoose.com, enter them on the screen shown below which is accessed via the Set Web Posting ID button.

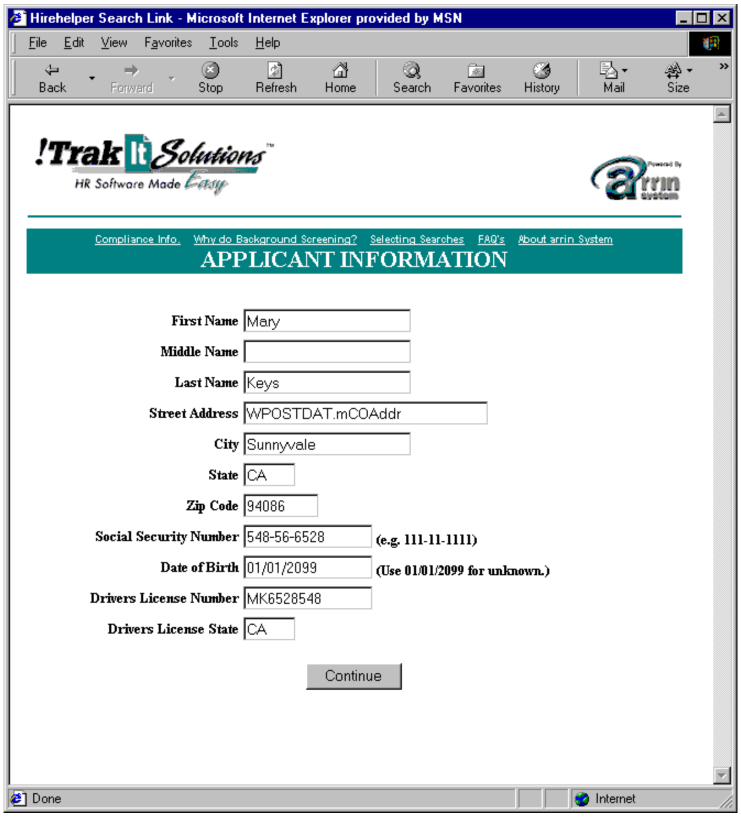


Background and Reference Check

To do a background check, go to the Main screen of the applicant of interest and click on the Background or Reference check button at the bottom of the screen. The following Confirmation screen will appear with the selected applicant's information displayed.



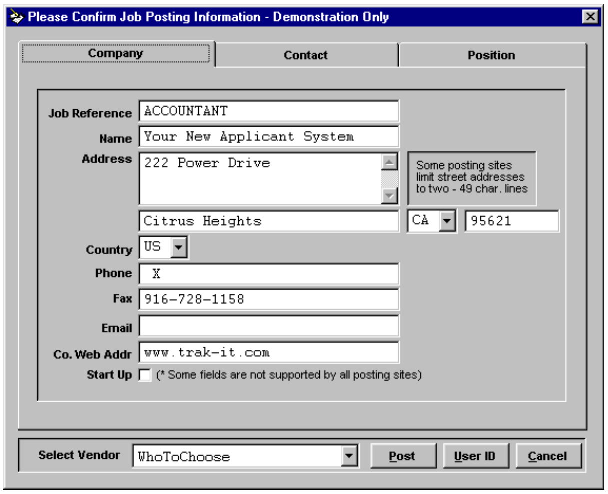
Click on the Post button to forward the applicant's data to the HireHelper.com web site.



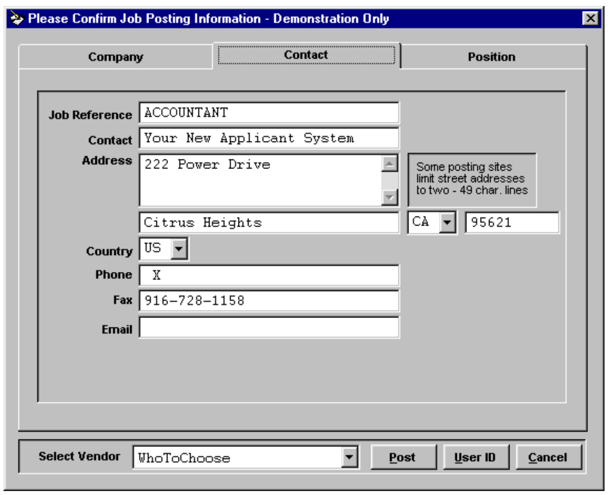
Click on the Continue button to select the type of background checks to be performed. When you have completed your transaction, close your browser and click the Cancel button on the Confirmation screen and you will be returned to the Main applicant screen.

Job Posting

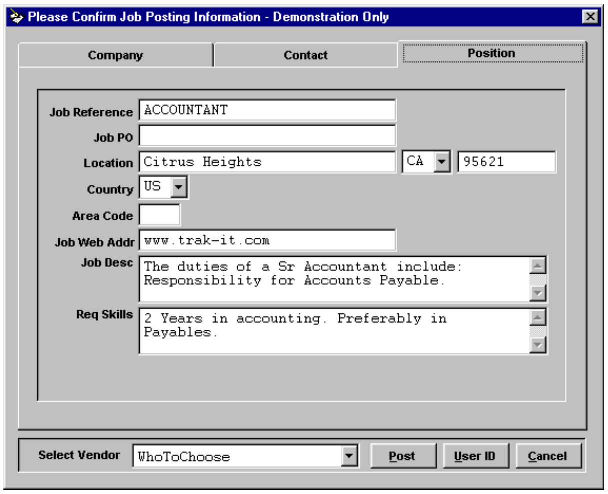
To post a job opening to multiple job boards from the Requisition screen with the desired job opening displayed, click the Publish button. Fill out the description of the job and the requirements you want displayed then click the Post Job button.



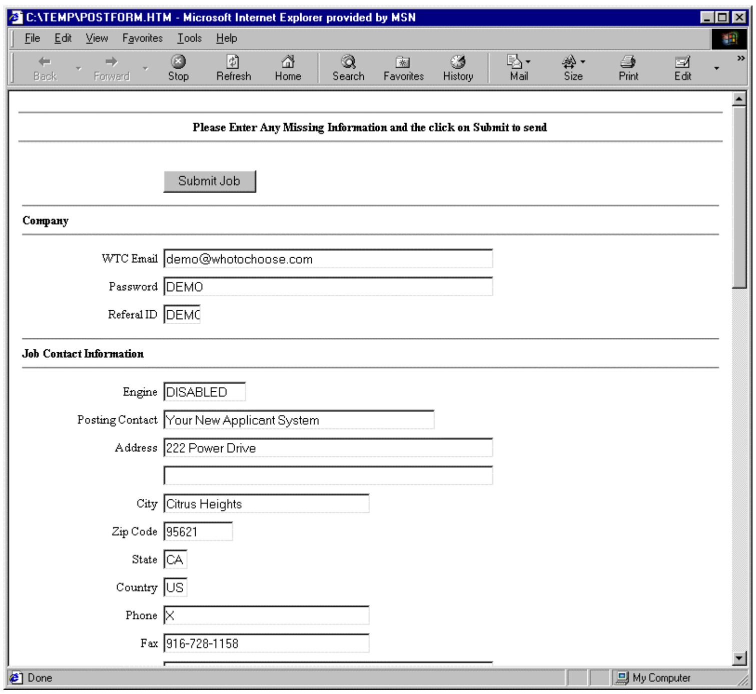
Verify and fill out the additional information requested (depending on the board you want to post to you may have to provide other items as well). Continue by clicking on the Contact tab.



And then click on the Position tab to complete all required data items. If you miss something the WhoToChoose.com validator will let you know.



Then click on the Post button to transfer your data to your web browser.



Click on the Submit Job Button to connect to WhoToChoose.com where you can specify which boards this job is to be posted to.

Click on the Post Job button at the top of the screen to select the job boards you want to post to. When you have completed your transaction, close your browser and click the Cancel button on the Confirmation screen and you will be returned to the Publish screen.

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