

Using AI Resume Matching Feature

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Note This functionality is coming soon to Self-Hosted clients.

Our AI Resume Matching feature brings you smart job order and employee matching. Enabling this feature will upload your employee resumes and basic job information to our AI matching engine. This will provide your recruiting team with the ability to match candidates to open jobs and visa versa directly in Beyond.

Note This feature must be enabled and initialized before it can be used. Each team member who wants to access the matching options in this article must be a part of a security group where "Can Access Source and Match" permission is enabled. Check out [AI Resume Matching Setup](#) for more information.

This integration is only for Beyond. Users will need to utilize Beyond in order to see matches. Make sure you are not utilizing an incognito window when attempting to view matches. Errors may occur.

In this article:

1. [Job Matching on Employee Records](#)
2. [Candidate Matching on Job Orders](#)
3. [Matching Menu](#)
4. [Scores & Matching](#)

Job Matching on Employee Records

Once you start utilizing this integration, you will see a new tab on every employee's record labeled "Job Matching."

EMPLOYEE James West (4295080490) / Job Matching

James "Jay" West (4295080490)
SSN: 343-45-4354 · NEW YORK, NY 10001

VISIFILE DETAILS ▾ DOCUMENTS MESSAGES **JOB MATCHING** ASSIGNMENTS STORY REFERENCES MORE ▾

Results (showing 50 of 2,125 | query took 109ms) [Filter These Results](#) [View Source Resume](#)

Adjust the importance of each category here. This will affect how each match is scored.

Education 36% Job Titles 8% Skills 18% Industries 0%

Certifications 0% Management Level 38%

i Better matches may be available based on the changes you have made. Click 'update' to refresh results.

[Update](#) [Undo Changes](#)

Match Score			Experience	Industry	Job Title	Doc Id	
73				Manufacturing - Equipment	Bilingual-Spanish, Machine Operator	...113249	View Job Actions ▾
67				Administrative or Clerical - Messages and Contact	nurse practitioners	...092461	View Job Actions ▾

This tab will display any active unfilled job orders in your system (viewable from your [hierarchy](#)) that match the employee's resume.

Note If you have the correct permissions but cannot see the Job Matching tab or any of the resume matching features after your system has been initialized, try clearing your cache. Check out [Beyond - Basic Browser Troubleshooting](#) for more information.

If your employee does not have a resume on file, this message will display:

EMPLOYEE Andrew Web (4295081483) / Job Matching

Andrew Web (4295081483)
 SSN: 758-58-3762 · EAGAN, MN 55121-2272

VISIFILE DETAILS ▾ DOCUMENTS MESSAGES **JOB MATCHING** ASSIGNMENTS STORY MORE ▾

The Employee with an Id of 4295081483 does not have a resume in Sovren for tenant twdemo.

Job Matching always utilizes the information from the employee's latest resume on file.

To upload a new resume, navigate to the documents tab on the employee's record and save the electronic copy of the new resume as a resume type. Check out [Beyond - How to Attach a Resume to an Employee Record](#) for more information.

Want to make sure the system is getting the most out of a resume? Check out: [Tips for Electronic Resumes](#)

Utilizing Filters and Category Importance

When viewing matching jobs, you can update or filter out matching job opportunities with the *Filter These Results* option. Use the *Filter These Results* option to limit results by the available categories (such as job titles, skills, location, etc.)

Results (showing 50 of 2,125 | query took 109ms) [Filter These Results](#)

[View Source Resume](#)

Adjust the importance of each category here. This will affect how each match is scored.

Education 18%	Job Titles 27%	Skills 37%	Industries 10%
Certifications 0%		Management Level 9%	

Adjusting the categories can influence the Match Score, which is a value from 0-100 indicating how well the candidate's resume matches a job listing. The higher the score, the better the match.

For example, if you want to match jobs closer to an employee's skills rather than their industry experience, you can adjust the "Skills" dial to a higher percentage or the "Industries" dial to a lower percentage. This will adjust the Match Score to reflect your priorities.

View Job

Match Score	Experience	Industry	Job Title	Doc Id	
66	 	Manufacturing - Equipment	Bilingual-Spanish, Machine Operator	...113249	View Job Actions


To review the list of matching jobs for a candidate, select the "view job" button on the right. Here you will see basic job information and more analytics on the Matching Score:

Details - Match Score: 66 Next > X

Document: 4295113249

Score

Match Score - 66



Match Breakdown

Evidence By Category

Skills (found 1 out of 59) ▼

Job Titles

Education (Meets expected) ▼

Industries (No matches) ▼

Management Experience (Full match) ▼

Company: Brigmans Repair Shop Job title: Machine Operator Job description:

Company Description

A manufacturing company in Maple Lake, Minnesota is looking for a Punch Press Setup person to start immediately.

Hours: 4:30pm - 3:00am (M-Th)

Pay: \$19-21/hr DOE

Job Description





Requirements of the Punch Press Set Up Operator:

- math skills
- understanding complex instructions
- how schematics work
- making sure items are designed and built correctly.
- Mechanical and Technical skills.

Click on the "previous" and "next" options on the upper right to move through the list of matching jobs.

Actions

Select the Actions tab next to a job result to open up more options:

71	 	No dominant taxonomy - Not enough data	Cashier	429509...	View Job Actions
71	 	No dominant taxonomy - Not enough data			<div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> View Job Order Make Employee a Candidate Assign Employee Find Similar </div>

- **View Job Order** will redirect you to the job order in Beyond. Check out [Beyond - Order Frequently Asked](#)

[Questions](#) for more information.

- **Make Employee a Candidate** will add the employee as a candidate on the job order. Check out [Beyond - How to Track Candidates on an Order](#) for more information.
- **Assign Employee** will assign the employee to the job. Check out [Beyond - How to Create an Assignment Record](#) for more information on assignment restrictions, etc.
- **Find Similar** will find other jobs that are similar to the one selected.

Candidate Matching on Job Orders

Once you start utilizing this integration, you will see a new tab labeled "Candidate Matching" on every unfilled active job order:

The screenshot shows the 'Candidate Matching' tab for a job order titled 'Last Chance General Store, Customer Service Representati... (4295092589)'. The interface includes a navigation bar with tabs for 'VISIFILE', 'DETAILS', 'CANDIDATES', 'CANDIDATE MATCHING', 'DOCUMENTS', 'MESSAGES', and 'CUSTOM DATA'. A message box states: 'If the Match Score does not display, preview the resume by clicking "View Resume". [Learn more about Match Scores](#)'. Below this, there are filters for 'Your Documents', 'Web Sourcing', and 'All (Scored)'. The main section displays 'Results (showing 50 of 859 | query took 218ms)' with an 'Edit Applied Filter' button. A slider control allows adjusting the importance of categories: Education (9%), Job Titles (29%), Skills (29%), Industries (13%), and Management Level (20%). Below the sliders is a table of results with columns: Match Score, Industry, Job Title, Experience, Education, and Doc Id. The first result shows a Match Score of 70, Industry of 'Call Center or Help Desk or Customer Service - Customer Facing', Job Title of 'Customer Service Representative', Experience of '6 years', Education of 'bachelors', and Doc Id of '...-57044'. There are 'View' and 'Acti' buttons next to the result.

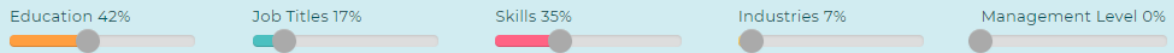
Match Score	Industry	Job Title	Experience	Education	Doc Id
70	Call Center or Help Desk or Customer Service - Customer Facing	Customer Service Representative	6 years	bachelors	...-57044

Utilizing Filters and Category Importance

When you have a lot of high scoring potential candidates, you can further limit your results by using the "Filter These Results" option.

Results (showing 50 of 745 | query took 171ms) [Filter These Results](#) [View Source Job](#)

Adjust the importance of each category here. This will affect how each match is scored.



i Better matches may be available based on the changes you have made. Click 'update' to refresh results. [Update](#) [Undo Changes](#)

- You can also adjust which categories available matter more to you and to this job order.
- Match Scores are a number from 0-100 that reflect how close the resume and job order match based on your adjusted categories.

View Resume

Select the "view resume" tab next to any result to view more details, including a breakdown of where the resume best matches the job order:

Details - Match Score: 60 Next > ✕

Actions Document: 4295094525-57044

Score

Match Score - 60

Match Breakdown

Category	Match Status
Skills	found 5 out of 15
Job Titles	found 1 out of 1
Education	Exceeds expected
Industries	Partial match
Management Experience	Full match

Evidence By Category

Minneapolis, MN •

SUMMARY

Energetic Customer Service Representative with 3+ years of experience resolving complex customer inquiries. Passionate about building strong customer relationships, driving brand loyalty, and increasing customer engagement.

EDUCATION

Coral Springs University
Aug '10 - May '14
Bachelor of Science in Business Administration

EXPERIENCE

Tradelot, Customer Service Representative
Jan '14 - Jan '18

- Resolve 300+ weekly customer inquiries via phone and email, consistently exceeding targets
- Pioneered development of improved system for following up

Use the previous and next buttons to move through the list of results.

Actions

Select the "actions" button next to a resume result to see more options:

65			Hotel and Hospitality - Restaurant and Bar	Waiter/Customer Service	6 years	429503...	View Resume
60			Administrative or Clerical - Admin	Customer Care Associate	9 years		View Employee
58			General Non-Skilled Labor - Drivers	I could.Customer Service, Cashier, Tice tech	8 years		Make Employee a Candidate

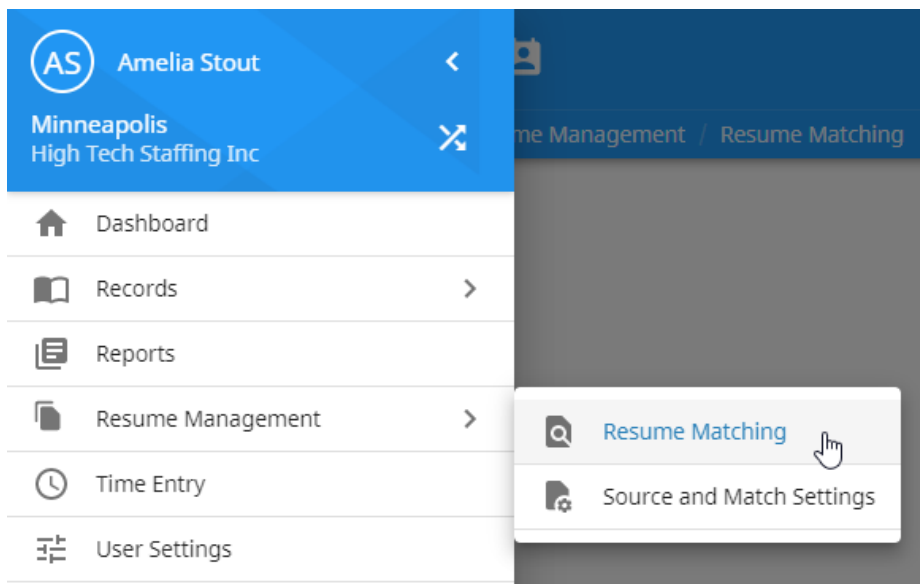
- Assign Employee
- Find Similar

- **View Employee** will direct you to the [employee's record](#) in Beyond.
- **Make Employee a Candidate** will add the employee to the [candidate's tab](#) on the order.
- **Assign Employee** will assign the employee to this job order. Check Out [Beyond - How to Create an Assignment Record](#) for more information.
- **Find Similar** will find similar resumes to the resume selected.

Resume Matching Menu

If you want to use the filter options to find potential candidates with certain skills, past experience, etc., you can use the "Resume Matching" option in the Beyond menu. You can use this tool even if you have no job orders and would simply like to search through your candidates.

1. Navigate to the menu
2. Select Resume Management > Resume Matching



3. Choose items from the list to filter criteria

Construct Your Search

Each filter selected below will decrease the number of results. We recommend starting with the single most important filter, then adding more based on the results as needed.

- Enter requirements for at least one category - click a category to expand each section
- Documents returned will meet all specified requirements
- When ready, click the Search button below to apply the filters and rerun the search

Job Titles ▼

Experience ▼

Skills ▼

Industries ▼

Boolean or Semantic Search ▼

Spoken Languages ▼

Certifications ▼

Executive Types ▼

Location ▼

[Search](#) ▼ (scroll for more)

4. Click the green "Search" button to find candidates.

Results (showing 50 of 559 | query took 625ms) [Construct Your Search](#)

Industry	Job Title	Experience	Doc Id	
Sales - General	Assistant Manager	1 month	429509...	View Resume
				Actions ▼
Sales - General	Assistant Manager	1 month		View Employee
				Find Similar

Scores & Matching

Matching Score

Matching Scores are painstakingly calculated based on AI algorithms, which take into account the information from the employee's resume, the requirements pulled from the job description, and the weighted categories available at the top of the matching screens. This score is bidirectional, meaning it takes into consideration how well the candidate matches the job as well as how well the job matches the candidate.

For more details on the Matching Scores, click the "View Resume" or "View Job" options next to your search results.

Match Score	→	←	Experience	Industry	Job Title	Doc Id	
66	●	●		Manufacturing - Equipment	Bilingual-Spanish, Machine Operator	...113249	View Job
							Actions ▼

Here you will be able to see a breakdown of how closely the job fits the candidate and vice versa. Use the arrows next to the categories to see more information.

You'll also notice that there are two options that display how well the job and candidate match: A "job-to-candidate" option and a "candidate-to-job" option.

Match Score	Job to Candidate	Candidate to Job	Industry
78	Green circle	Green circle	Healthcare Non-physician
66	Yellow circle	Yellow circle	Call Center or Help Desk

The circles indicate how well the candidate matches the job and the job matches the candidate:

- Green means it's a great match
- Yellow means fair
- Red means not a great fit

There will be times where an employee might be a great fit for a job, but the job might not best fit for the employee. (For example, if you employed Bill Gates, he would be a great match for a Software Developer I position, but he has so much experience that the job position wouldn't be a great match for him.)

Job-to-Candidate

This indicator focuses on the question: "Is this **Job** a good fit for the **Candidate**?" Here is an example:

The screenshot shows a user interface for a job-to-candidate match score of 78. At the top, there is a header 'Details - Match Score: 78' and an 'Actions' dropdown menu. Below this, a blue bar displays 'Score' with an upward arrow. The main content area is titled 'Match Score - 78' and features two navigation icons: a person with an arrow pointing to a document (job-to-candidate) and a person with an arrow pointing from a document (candidate-to-job). A tooltip over the job-to-candidate icon reads 'How well the job fits the candidate'. To the right, a section titled 'Evidence By Category' lists several categories with their respective match counts and status:

Category	Match Status
Skills	(found 5 out of 29)
Job Titles	(found 1 out of 1)
Education	(Meets expected)
Industries	(No matches)
Management Experience	(Full match)
Certifications	(found 0 out of 3)

When you click on "View Resume" or "View Job," you will see a breakdown of how closely the job matches what the candidate has to offer. You can use the arrow next to each category to see more information:

Details

- ✔ The job mentions the following skills that the candidate has experience with:
 - CUSTOMER SERVICE
 - CUSTOMER SERVICE ORIENTED
 - RETAIL SALES
- The job does not mention the following skills that the candidate has experience with:
 - ANSWERING
 - ARRANGEMENTS
 - CALL CENTER REPRESENTATIVE
 - CREDIT CARD
 - CRM

If your job descriptions are short or limited, then the system may not accurately depict whether the job is a good fit for the candidate. It's important to ask yourself - If a candidate has many more skills than the job requires, would another job be a better fit?

Candidate-to-Job

This indicator focuses on the question: "Is this *Candidate* a good fit for the *Job*?" Here is an example:

The screenshot displays a 'Details - Match Score: 78' interface. At the top, there is an 'Actions' dropdown and a document ID '4295038560-51574'. Below this is a blue header for 'Score' with an upward arrow. The main content area shows 'Match Score - 78' with two icons: a person pointing to a document and a person with a document. The 'Match Breakdown' section features a pie chart with five segments in grey, orange, green, pink, and teal. The 'Evidence By Category' section lists five categories with progress bars and dropdown arrows: Skills (found 5 out of 15), Job Titles (found 1 out of 1), Education (Meets expected), Industries (No matches), and Management Experience (Full match). At the bottom, there is a blue bar for 'Candidate Analysis' with a downward arrow.

Select the arrow next to any category for more information. Note that the system takes into account **when** they had experience with any of the desired skills, not just what skills are present on their resume:

Details

- ✔ The candidate has current experience with the following mentioned skills:
 - CUSTOMER SERVICE
 - CUSTOMER SERVICE ORIENTED
 - RETAIL SALES
- Although the candidate has experience with the following skills, that experience is not current and is therefore less valuable:
 - PROBLEM SOLVING
- Found no evidence that the candidate has experience with the following skills:
 - ADJUSTMENTS
 - ANSWERING
 - CRM
 - CUSTOMER ACCOUNTS
 - CUSTOMER SERVICE REPRESENTATIVE
 - HELPDESK
 - JIRA
 - MULTILINE
 - PHONE SKILLS

Remember that some employee resumes may be incomplete, so use these details as a guide. There may be times when you interpret data differently.

Related Articles