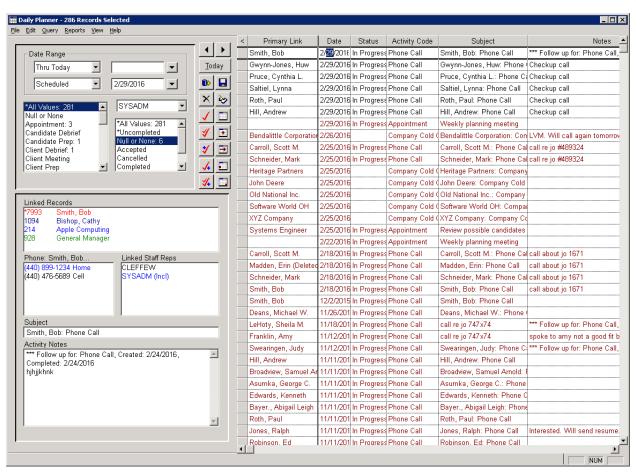# All About the Daily Planner

Overview

The Daily planner is a contact management tool for working through your day's activities. It can view, edit, and complete Activities. The planner is also an excellent querying & reporting tool that can be used to monitor and report on Staff Rep Activity.

The Daily Planner is made up of 3 sections: The Filter Pane in the upper left section, the Detail section in the lower left section and the Table section on the right side. The Detail section displays information about whichever activity is highlighted on the right.
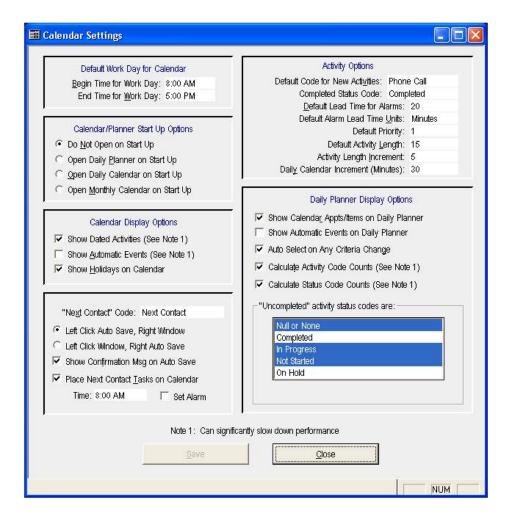
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Settings

Settings for the Planner are located in SETTINGS → USER OPTIONS → CALENDAR SETTINGS

- If this option is grayed-out and not available on your menu, SYSADM must change the option to allow users to edit Calendar Settings
    - SETTINGS → SYSADM OPTIONS → WINDOW SECURITY OPTIONS
- All settings are *user-specific* and will not affect any other user's settings
- SYSADM settings become settings for themselves and new users

Calendar/Planner Start Up Options

- Users can select what type of calendar they would like to auto-open when they login to WinSearch (Daily Calendar, Monthly Calendar, or Daily Planner)
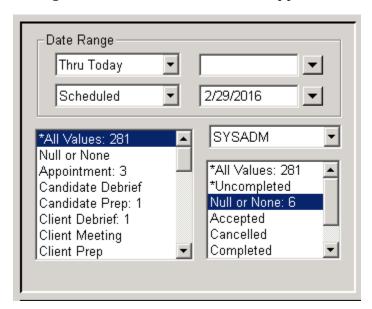- If none is desired, select Do Not Open on Start Up

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Daily Planner Display Options

- Show Calendar Appts/Items on Daily Planner
- Show Automatic Events on Daily Planner
    - This option will show any type of automatic activity that is turned on: ie user logins, new person's record creation, **Email logging**
    - If you use **Automatic Email logging** and do not want emails sent or received to show on your Daily Planner, this option needs to be unchecked!
- Auto Select on Any Criteria Change
- Calculate Activity Code Counts
- Calculate status code counts

    Checking any will auto update changes/numbers in real-time. Having this turned on may cause a lag in very large databases

- Uncompleted Activity Status Codes
    - This feature will set specific status codes to auto-select when the *Uncompleted status is chosen in the Daily Planner Window|Status Code box

Using the Planner as a Contact Management Tool

Your default settings on the Daily Planner will differ depending on your needs and what types of data you want to see. A sales person, for example, may want different default settings than a Manager, who needs settings to view multiple recruiter Activities. These settings are set in the Filter Pane, the upper left section of the Daily Planner window.

Status Codes & Uncompleted Activities

- To use the Planner as a Contact Management tool, you need to view your outstanding Activities or "To-Do List"
- **Uncompleted Activities** are any Activity in WinSearch with an outstanding status, such as *In Progress* or *Not Started*
- *Null or None* is for activities where no activity status code is entered
    - ▫ Null or None will select any Activity that was created without a **Status**
    - ▫ SYSADM can require all activities to have a Status **Settings → SysAdm Options → Activity control Options**

Date Range

- When using the planner on a daily basis, the most ideal date range to view outstanding activities is **Thru Today**
    - ▫ **Thru Today** encompasses all Activities with today's date on top, going backwards in time
    - ▫ Allows the "roll over" of Activities on the Planner from day to day, until completed
    - ▫ Coupled with **Uncompleted Activities**, this gives an ideal view of all outstanding Activities through today
- TIP - *If you have never used the planner before, Thru Today may contain a very large amount of Activity Records, so using "Today" and "This Week" are good options for getting started*

Activity Codes

- You also have the ability to select what types of Activities to see as a default
- Multiple Codes can be selected at once
- All Values is usually a fine option, depending on how your company uses Activities
- Available choices are set by what activity codes are set up in your database

Saving Settings

Once changes have been made, you can set these settings as a default to appear when you open your planner.
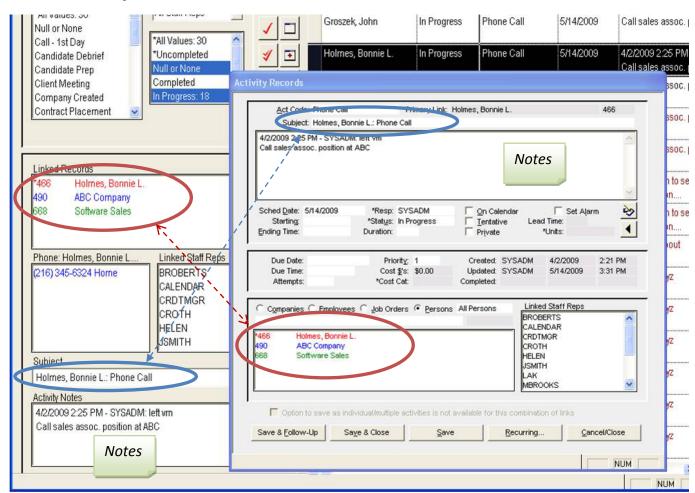
- **Query → Save current criteria as defaults**
- This will save **criteria** selected settings only, NOT window settings
- **Window Settings** are still saved under the normal **View → Save Window Settings**

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Planner Breakdown

Data Display

The Daily Planner is essentially just an Activity Record broken down and displayed along the bottom left of the window. If you open up an activity record, you can see the data mirrored from the Planner to the Activity itself

- **Linked Records** - are links to the actual Person/Company/Job Order records themselves
  - ▫ Double click to launch record
  - ▫ Can be useful when going through a call list to quickly access information, ie Job Description
- **Phone Numbers** – a bonus on the planner
  - ▫ Phone Numbers will display for the Primary link only
  - ▫ Cannot see these numbers from an activity record
- **Linked Staff Reps** – can view, right click to edit
- **Subject** – can edit here
- **Activity Notes** – can edit here

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Icons

The Icons in the middle of the planner can be used to quickly edit, reschedule, and complete activities. The options available here are also available by right-clicking an activity in the table section.

- **Arrows:** Will take you to *Today, Tomorrow*, custom dates
- **Today Button**: Takes you back to today but NOT *Thru Today*
- **Select Records**: Refreshes activities listed on planner
- **X :** marks Activity for Deletion
    - □ This deletes Activities from **existence** not just the Planner!
    - □ Complete Activities and use "refresh" tool to get them off the Planner
- **Single Check**: opens Activity, same as double clicking
- **Double check**: Marks Activity as *Completed*
- **Check plus**: creates New Activity
- **Check plus behind:** creates *Follow Up Activity*
- **Double check plus behind:** Marks Activity as *Completed* and creates *Follow Up*
- **Save Icon**
- **Pop up editor** – for the Activity notes
- **Calendar:** Select reschedule date
- **Calendar + :** Add attempt & Select reschedule date
- **Calendar →:** Reschedule for tomorrow
- **Calendar □ top:** Reschedule 1 week
- **Calendar □ bottom:** Reschedule 1 month

*Tip– *Hold mouse over icons for drop down hint*

> *Example: Mark Group of Activities as Completed*
> _____
>
> - □ Highlight or select the Activities that you would like to change to Completed
> - □ Use the ✓✓ (double check) icon to mark Activities **Completed**
> - □ Rows will change to Blue
> - □ Hit Select Records (or "refresh" icon) to refresh Planner
>
> *Example: Reschedule Selected Activities*
> _____
>
> - □ Highlight or select the Activities that you would like to Reschedule
> - □ Use the **Calendar Icon** to Select a new **Scheduled Date**
> - □ Remember that using **Thru Today** will still allow you to see Activities from previous dates!

Colors

The Daily Planner color-code your activities so you can see at a glance the activities listed. WinSearch assigns colors to activities in this order:

- **Blue** — Completed activities
- **Red** — Activities with Due Dates that have lapsed
- **Dark Red** — Appointment dates that have lapsed
- **Green** — Recurring activities
- **Gray** — Tentative activities
- **Black** — Remaining activities

Using the Planner as an Administrative Management Tool

The Daily Planner can also be used as a management tool to monitor and report on a coworker's or your staff's Activities. The difference becomes what you choose in the Filter Pane. Rather than the day-to-day options, you can use the Filter Pane to show specific types of activities for your coworkers for a specific date range.

Date Range

- Set this for the date range to monitor as a manager
  - *This Week, This Month, This Quarter, This Year, Last Month, Last Quarter, etc.*
- Use first box in second row of boxes to decide whether you want activities scheduled, created, updated or completed for the chosen date range

Activity Codes

- Select the types of Activity you want to monitor, based on your company's **Activity Codes**
- This can also be used in reporting if you want to run a report on things like Submittals and Interviews, Placements, Phone Calls, etc
- Activity codes are set per database for what business process steps to track

Staff Rep

- Using the Staff Rep LOV to view other StaffRep's Activities
- Choose **All Staff Reps** to select all
- Very useful when running **Reports** to see total company Activity

Status Codes

- Select whether you want completed, uncompleted or all of them

- ▫ Date Range: **This Week**
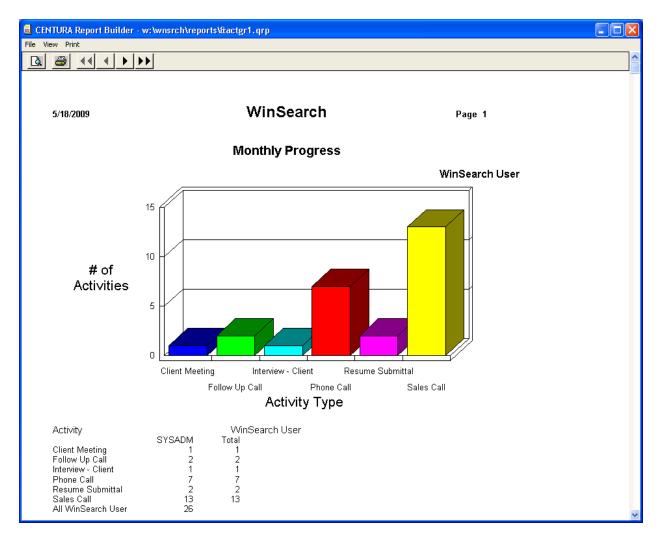- ▫ Activity Code: **Phone Call**
- ▫ Staff Rep: **All Staff Reps**

TIP: *If changing settings does not automatically generate results, use the Select Records Button to push changes through.*

Using the Planner as a Reporting Tool

The Daily Planner is also an excellent reporting tool for Activities. It can pull up quick data sets for personal reports, as well as more in-depth and company-wide reports for managers.

Individual User Reports

- Customize Date Ranges and Select specific Activity Codes to assess productivity
    - ▫ *Example:* **Monthly Progress Report**
    - ▫ Select Data for the report
        - ▪ Date range – this Month
        - ▪ Activity Codes – *any that apply (ie Resume Submittal, Phone Calls, Interview)*
        - ▪ Status Codes – All Values
    - ▫ REPORTS → STANDARD REPORTS → MONTHLY PROGRESS

- Use **Memorized Reports** to quickly view snapshot or print out "To-Do List" for specific periods of time, ie Today, This Week, This Month
    - ▫ To Select, go to REPORTS → MEMORIZED REPORTS →MY CALENDAR FOR ….
      (THIS MONTH , THIS WEEK, TODAY)

Manager Reports

- Can customize Date Ranges and Select specific Activity Codes to assess productivity of All Staff Reps
    - To Print this Customized Report, then go to REPORTS → STANDARD REPORTS and select the type of detail you want to see
    - *Example:* **Breakdown Graph - Activity and Staff Rep** *(see steps from Individual User Report)*
    - Make sure to say "NO" to preview the report or print the report for all records

- **Memorized Reports -** Need no pre-selection of data
- Go to REPORTS →MEMORIZED REPORTS for excellent Management Reports like:
    - Everyone's Current Month Calendar
    - Graph of Everyone's Current Month
    - Graph of Everyone's Daily

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CENTURA Report Builder - w:\wnsrch\reports\tactgr1.qrp

File   View   Print

WinSearch

Graph Of Everyone's Daily

WinSearch User

- BROBERTS
- HELEN
- MBROOKS
- SSMITH

# of Activities

Client Meeting   Next Contact   Sales Call
Follow Up Call   Phone Call

Activity Type

Activity	WinSearch User				
	BROBERT	HELEN	MBROOKS	SSMITH	Total
Client Meeting	4	1	0	0	5
Follow Up Call	0	7	2	0	9
Next Contact	13	0	1	0	14
Phone Call	0	6	0	23	29
Sales Call	0	0	9	0	9
All WinSearch User	17	14	12	23	

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