ABC's of WinSearch

ABC’s of WinSearch Table of Contents

ABC's of Windows Basics

To use WinSearch effectively, you need to use Windows effectively. Some of the skills you need include:

- Selecting menu commands
- Minimizing windows
- Maximizing windows
- Restoring windows
- Closing windows
- Sizing windows
- Moving windows
- Selecting menu commands

Menu commands in many Windows programs appear as Edit | Paste. In this example, it means that you go to Edit in the menu bar and select Paste from the Edit drop-down menu. You can use the mouse or keyboard to select menu items. Use either method to select a menu command:

- Click on the item in the menu bar then click on the item within the drop-down menu.

- Press **Alt** to activate the menu then type the underlined letter for the desired item in the menu bar. Select commands from a drop-down menu by typing the underlined letter for the item. A few menu items do not have underlined letters. To select these, type the first letter of that menu item. If more than one item has the same underlined letter or starts with the same letter, typing the letter only highlights the choice. Press **Enter** to select it.

To minimize a window to an icon:

- Click once on the Minimize button () in the upper right corner of the window that you want to minimize.

  The window shrinks to an icon at the bottom of the screen. You can double-click it to return it to its previous size. Once the window is minimized, it looks something like this:

To maximize a window so it fills the whole area:

- Click once on the Maximize button () in the upper right corner of the window that you want to maximize.

To restore a window so it fills less than the whole area:

- Click once on the Restore button () in the upper right corner of the window that you want to restore.

To close a window, follow one of these procedures:

- Double-click its control menu box, the icon in the upper left corner

- Select the File | Exit command

- Press **Alt**+**F4**

- Click the Close button () in the title bar

To move a window:

1. Point to the title bar (the blue bar at the top of the window) so the mouse looks like this:

2. Click and drag the mouse to a new location.
3. Release the mouse.

To change the size of a window:

1. Point to the edge of the window so the mouse looks like this: ⇔
2. With the mouse looking like ⇔, hold down the left mouse button and drag the mouse to where you want the window’s new border.
3. Release the mouse.

Notes

- New users frequently become confused when they double-click something but nothing happens. New users frequently move the mouse slightly between double-clicks. When you move the mouse between the two clicks, Windows recognizes it as a click in two separate locations rather than the double-click that you intended. This frustration disappears with time as you become accustomed to using a mouse.
- How to remember whether to single-click or double-click something? If it is a menu, single-click. Outside of menus, if you want to move to that location, single-click it. If you want to move to that location and do something to it, double-click it. Another way to look at it is, that if you single-click it and WinSearch doesn’t do what you want it to do, double-click it. If double-clicking doesn’t do what you want, WinSearch has a different method for doing the task you want to complete.
- Right-clicking means performing a clicking motion with the mouse but using the other button on the mouse. Right-clicking performs a different feature than single- or double-clicking, often displaying a popup menu filled with appropriate choices for your current activities.
- You can switch between the open WinSearch windows by pressing Alt+1.
- Double-clicking row headers (the boxes at the beginning of a row) displays the row's information in a form window. The two exceptions are LOV tables where you pick which entry you want from a list and Documents Detail Tables where you open that document for editing.

ABC's of Key Words

Key words are words or phrases that are important to you and your company. It can be a skill, position, quality, or anything that will help you identify that person, company, or job order. They can represent key pieces of information. Key words make searches faster because WinSearch performs searches using indexes created on these key words. Key words also make searches more effective: Rather than ask for every variation of how a skill may be presented, you can set up synonyms to assign the variations to a key word. Then when you want that skill, you ask for the single key word. Key words are assigned to people, companies, and job orders. WinSearch can automatically extract key words or you can manually assign them. Some key points about key words are:

- A key word can belong to only one category
- A key word can only be created once; it cannot be duplicated
- A key word cannot also be a synonym

Before a key word can be assigned to a person, company, or job order, it must be in the Key Word dictionary. To have WinSearch automatically assign key words to persons when their résumés contain the text, you need to add those key words to the dictionary.

To make your searches more effective, key words have synonyms. The synonyms are alternate ways that the information in a key word can be presented. As an example, DB2 (the IBM mainframe database program) might appear on resumes as DB-2, DB 2, and DB/2. By creating the key word DB2 with the synonyms of DB-2, DB 2, and DB/2, all people who have DB2 in their skill set have the DB2 key word regardless of how they presented that information in their resume.

When you process resumes, WinSearch checks through the contents of a resume to find key words and synonyms. When it finds a key word, it assigns that key word to the person. When it finds a synonym, it assigns the synonym's key word to that person. Figure A shows a diagram of how this works. When Sharon's resume is processed, WinSearch finds Billing and Manager and assigns those key words. WinSearch also finds synonyms of Arthur Andersen and Accounts Receivable. WinSearch assigns the key words assigned to those synonyms, BIG 6 and A/R in this instance. While automatically assigning key words most often occurs with resume processing, the same concepts apply when automatically extracting key words from a person's, company's or job order's text.

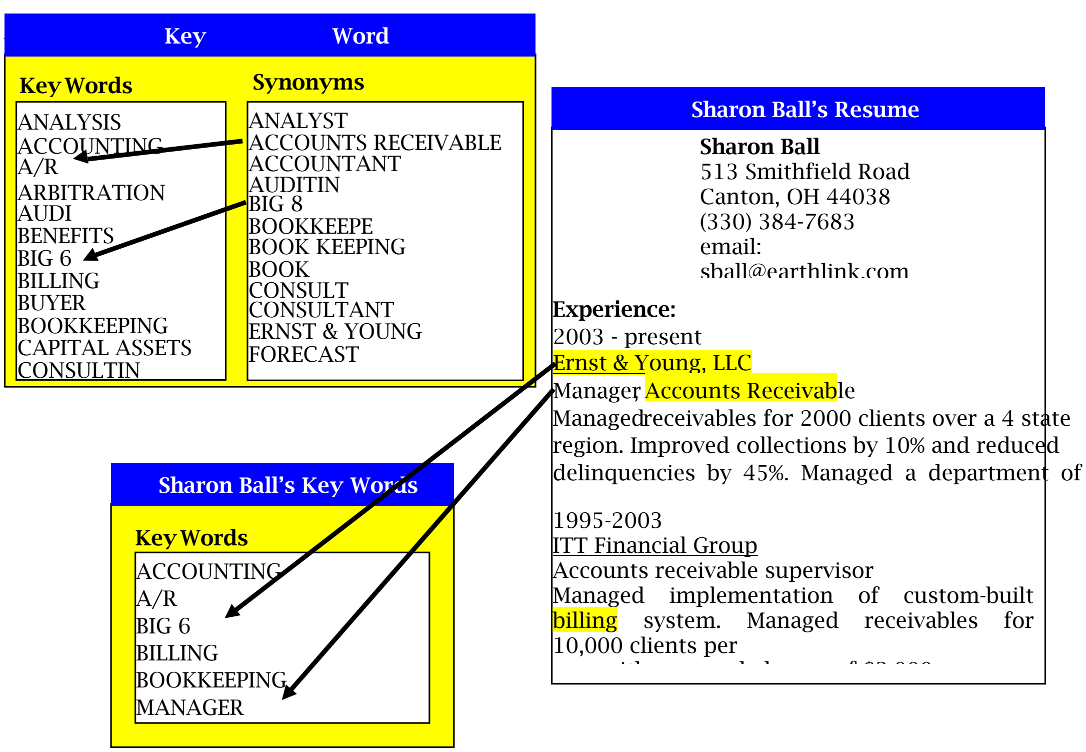
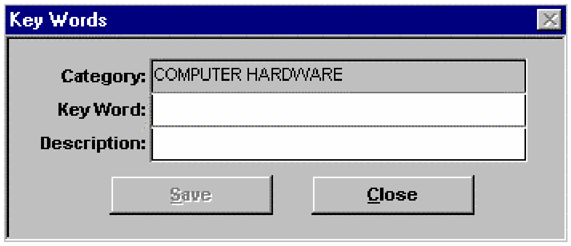


Figure A: How WinSearch Uses the Key Word Dictionary

To add a key word to the Key Word Dictionary:

1. Open the Key Word Dictionary window shown in Figure B. To do this:
    - Select the Lists | Key Words command.
    - Right-click the key word list box in any person, company, or job order main form window and select Key Word Dictionary from the popup menu.
2. Select the category that the new key word will belong to from the Categories list box.
3. Click on the Add button in the Key Word columns to open this dialog box:



4. Type the new key word in the Key Word text box.
5. Type the description for this key word in the Description text box.
6. Select the Save button.
7. Repeat steps 4 through 6 for each key word that you want to add to the selected category.
8. Select the Close button to close the Key Words dialog box.
9. Repeat steps 2 through 8 to add key words to other categories.
10. Select the File | Exit command to close the Key Word Dictionary window.

To add a synonym to the Key Word Dictionary:

1. Open the Key Word Dictionary window as described above.
2. Select the category that has the key word that you want to assign a synonym to from the Categories list box.
3. Select the key word that the new synonym will belong to from the Key Words list box.
4. Click on the Add button in the Synonyms column to open the Key Words Synonyms dialog box.
5. Type the new synonym in the Synonym text box.
6. Select the Save button.
7. Repeat steps 4 through 6 for each synonym that you want to assign to the selected key word.
8. Select the Close button to close the Key Word Synonyms dialog box.
9. Repeat steps 2 through 8 to add synonyms to other key words.
10. Select the File | Exit command to close the Key Word Dictionary window.

To change the category assigned to a key word:

1. Open the Key Word Dictionary window as described above.
2. Select the key word that you want to assign a new category from the Key Words list box. You may want to select the old category first to quickly locate the key word.
3. Click on the Update button in the Key Words column to open the Key Words dialog box.
4. Select the new category from the Category drop-down list box.
5. Select the Save button.
6. Select the File | Exit command to put away the Key Word Dictionary window.

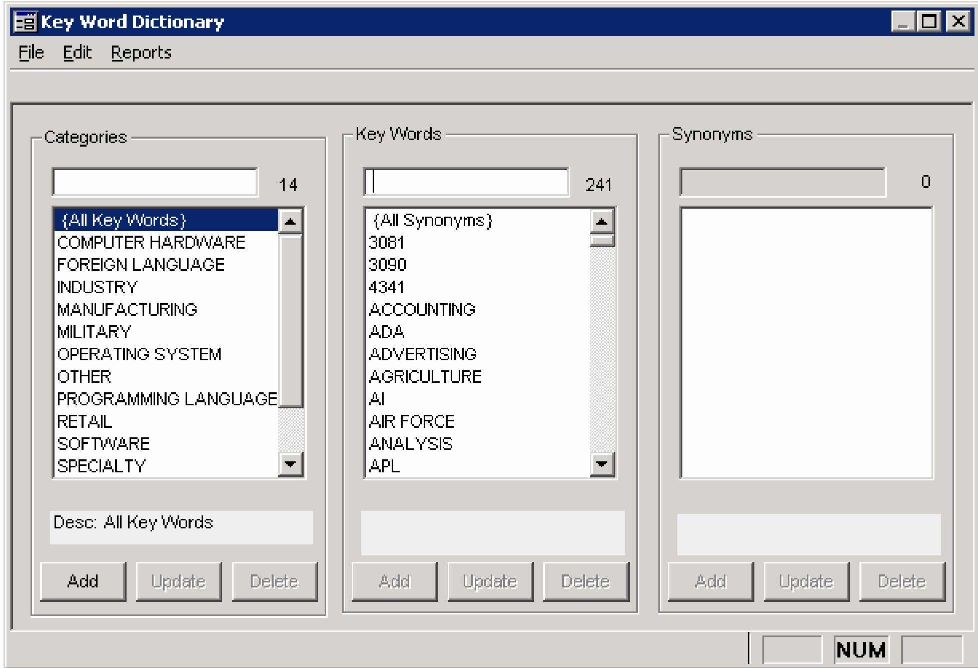


Figure B: Key Word Dictionary window

To change the key word assigned to a synonym:

1. Select the Lists | Key Words command. You will see the Key Word Dictionary window like the one shown in Figure B.
2. Select the synonyms that you want to assign a new key word from the Synonyms list box. You may want to select the old category and key word first to quickly locate the synonym.
3. Click on the Update button to open the Synonyms dialog box.
4. Select the new key word from the Key Word drop-down list box.
5. Select the Save button.
6. Select the File | Exit command to put away the Key Word Dictionary window.

Notes

- When you add key words, WinSearch does not go back and review the résumés to identify the people whom that key word is appropriate. To do so, you must reprocess résumés. WinSearch has a Settings | Utilities | WSResume Batch Reprocessing command for this purpose. SYSADM will also see a message during login as changes are made to the Key Word Dictionary that require reprocessing.
- If you try adding a key word or synonym that the database already uses as a key word or synonym, then you will get a message telling you that the key word or synonym already exists. If you want to find out what category a key word belongs to, select {All Key Words} from the Category list box then find the key word listed alphabetically in the Key Word list box. If you want to find out what key word a synonym belongs to, select {All Synonyms} from the Key Word list box then find the synonym listed alphabetically in the Synonyms list box.
- When you see the list of key words in WSResume, you can find out where these key words appear in the resume by clicking on the key word in the list to highlight where it appears in the document.
- You can add key words to people, companies, and job orders using the person, company or job order main form window. Right-click the key word list and choose Add Key Word. If the key word list box splits into two, just type the new key word and press Enter. If the key word list box does not split into two, you will see the Key Word Dictionary window where you can select the key word then click the Select button.
- You can assign or adjust the weights assigned to a key word if the SYSADM user has turned on key word weighting. To change the weight for a person's, company's or job order's key word, click on the key word and then press the + or − keys.

- You can delete key words from the Key Word Dictionary by selecting them in the list and choosing the DELETE button. You can tell that a key word is selected because its description appears below the Key Word list box.
- You can delete key words from a person, company, or job order by right-clicking the key word from the main form window and choosing DELETE SELECTED KEY WORD. WinSearch remembers that the selected key word was deleted from the person, company or job order so WinSearch will not restore the key word when the resumes are reprocessed.
- When WinSearch processes a resume and it finds a synonym, it assigns the key word, not the synonym.
- Searches are done on key words, not synonyms.
- Searches automatically include any key words assigned to a search's owner as criteria for that search. Thus, start a search from a job order and the job order's key words become search criteria for the new search.
- In a search, you can choose Key Words – Root or Key Words & Syns as criteria. The difference is what appears in the list of values on the right. When you choose Key Words – Root, the list shows the key words on the left and their description on the right. When you choose Key Words & Syns, the list of values shows both key words and synonyms on the left-hand side. The right hand side displays the key word that a synonym is assigned to or the description for the key word shown on the left. When you double-click a synonym from the list, the criteria that you are adding is for the key word that the synonym is assigned to. Regardless of which criteria that you add, the results are the same.
- WinSearch has a KWMerge utility that you can run to combine two key words. Run this utility with the SETTINGS | UTILITIES | START KWMERGE command.
- You can assign key words to a person, company or job order based on entries such as Notes or Position Description. Right-click the text entry and choose GET KEY WORDS. You will have an opportunity to review the list before adding them.
- Key words are automatically extracted when processing resumes—whether the process is done with WSProcessor, the New Person From Clipboard, from the document in Outlook or the Process Resume button in Word. When you add an additional document to a person or company through Word or Outlook, you choose whether the document is processed for key words. For people, processing a document for key words also creates a version of the document in WSResume.
- For people whom you have marked as DNU (Do Not Use) or something similar, you can right-click their key word and choose DELETE ALL KEY WORDS to remove their key words so they do not appear on searches.

ABC's of Processing Resumes and Documents

Once you have a résumé the next step is to process it. When WinSearch processes a resume, it can extract the name, contact information and key words as you can see in Figure A. Resumes (or other documents) can be processed in the following ways:

- Open the resume in Word or highlight the email with the attachment then click the PROCESS RESUME toolbar button ( ).
- Open the resume or other type of document in Word, or highlight the email in Outlook, and click ADD TO DATABASE RECORD toolbar button ( ). Use this button when you know that the person is already in WinSearch or the person's name is not at the beginning of the document, or you want to add the document to a company.
- Highlight the text in another program then copy it to the Clipboard. Once the text is on the Clipboard, switch to WinSearch and click the New Person From Clipboard toolbar button ( ). In Outlook, you can highlight the text (with the person's name in the first line) then click the Process Selected Text toolbar button ( ).
- Put the file containing the resume into the folder that WSProcessor monitors and imports documents from. This approach works well for importing documents already stored in folders.
- Have a folder of emails in Outlook then click the Process All Email(s) in Selected Folders toolbar button ( ). This processes all emails with attachments for people that WinSearch does not recognize as already in the database.

This resume processing works for both creating new people out of the text in their resume or adding a document to an existing person. Figure A shows a person who may have been added with any methods described above. Regardless of the method chosen, the results are similar. The exact method to use depends upon where the data comes from and what you are doing at the time. For example, resumes via an email's attachment are most easily added with the toolbar buttons available from within Word or Outlook. Resumes that come from web sites or the text of an email are more easily added with the New Person From Clipboard toolbar button ( ). Once you use that toolbar button, you can decide whether you want to save the person or not.

The most common way to add a resume is by opening the resume in Word and clicking the PROCESS RESUME toolbar button ( ). This takes the current document, processes it as a resume and deciphers the contact information.

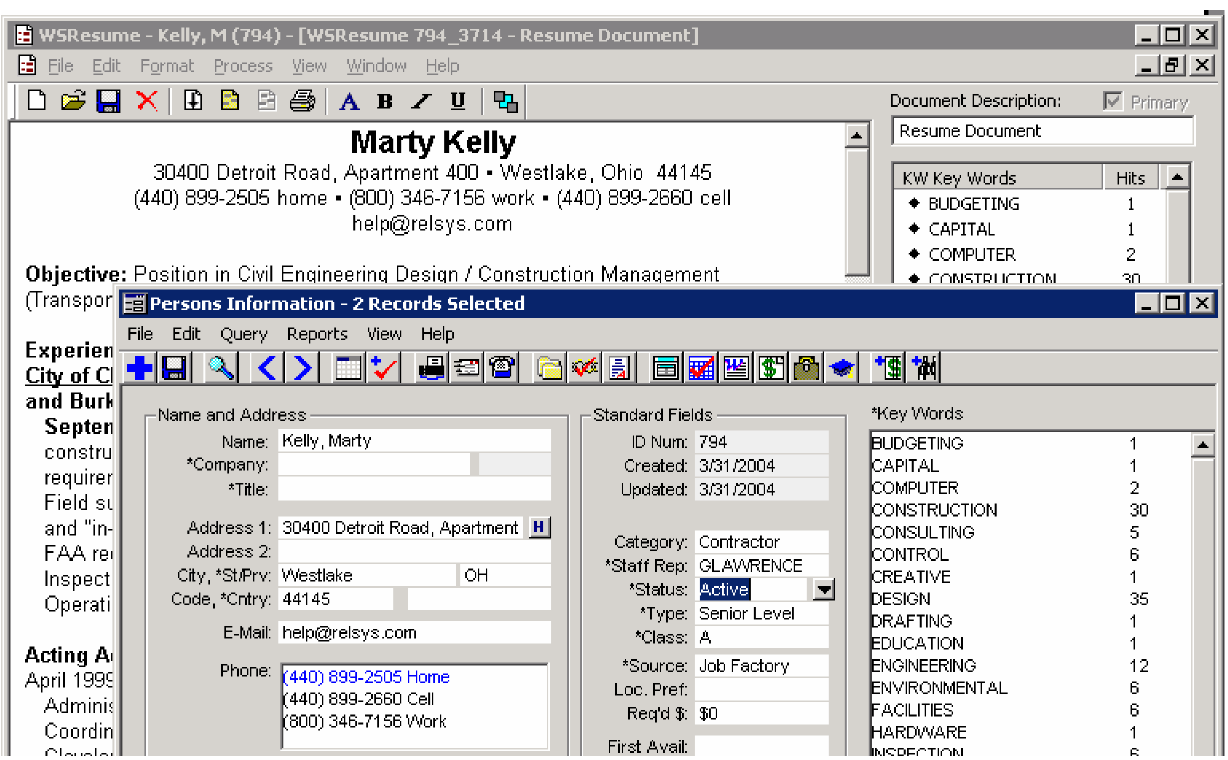
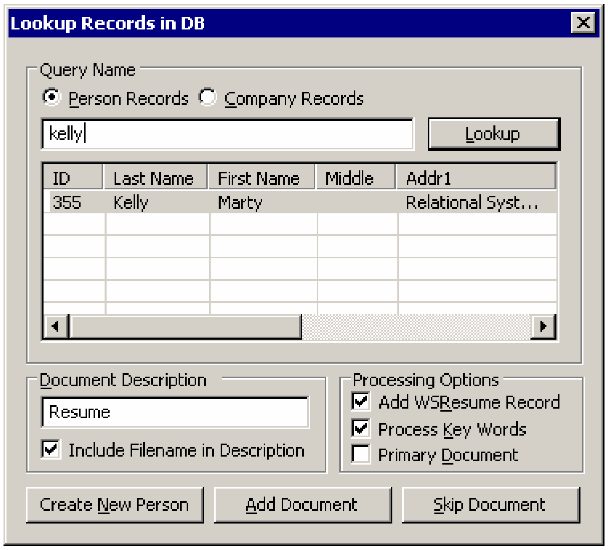


Figure A: Information Extracted from a Resume

Assuming that the person is not a duplicate, that person is added and the document is added both as a WSResume document and as an imported document (now named starting with the person's ID number).

To process resumes with Add to DB Record:



1. Open the document or highlight the email to process.
2. Click the Add to Database Record button ( ) to show a dialog box like the one shown to the right.
3. Enter the person's name and click Lookup. You can also find companies by clicking Company Records then entering the company name before clicking Lookup. Now the dialog box shows all that matches your selection.
4. Click the person/company to which you want the document added.
5. Enter the description for this document.
6. Choose whether you want the document processed for key words, added to WSResume (persons only), or flagged as the primary document with the appropriate check boxes.
7. Click Add Document to add the person.
8. If you changed your mind, you can click Skip Document to end this process. You can also choose Create New Person to create a person as if you clicked Process Resume toolbar button.

Notes

- With Process Resume ( ), if a person with that name already exists, you will see the lookup dialog box shown above with a Possible Duplicates Found title bar. To add the current document/resume for someone already in the database, highlight them in the list then click Add Document. If the resume does not belong to someone in the list, click Create New Person.
- The New Person From Clipboard toolbar button ( ) will more correctly fill the person's form if you make sure that the person's name at the beginning of your selection.
- When you create a person through Word, the person's initial Category, Staff Rep, Status, Type, Class and Source entries are set by WSProcessor's settings. To set them, select Settings | Utilities | Start WSProcessor command then go to WSProcessor's Options to set these values for people added with WSProcessor or Word.
- Need to decide whether to use Process Resumes or Add to DB Record? If the first line in the document contains the person's name, it probably won't matter. However, use Add to DB Record to reduce adding duplicate people when one or more of the following occurs:
    - Person's name includes suffixes like Jr. or III or certifications such as CPA or JD or MSCE
    - Document to add to a person does not have their contact information at the top
    - Document should not be processed for key words, which often includes skill sheet assessments
- Want to change what happens when you add a document/person with Process Resume or Add to DB Record? Click on the Options button in the WinSearch toolbar in Word then make selections for whether you want to see the person's form, whether you want the document to remain open and whether the original document should be deleted.
- WSProcessor manages importing folders of resumes with minimal input. If this feature is useful, read about it in WinSearch's complete manual.
- WinSearch does not extract employment history or educational background from the resume. If you want this information in the Job History or Education Detail Tables, you must enter it there.
- Processing a resume for a person does not update their contact information. To update their contact information, open their imported Word document and click the Update Address toolbar button ( ) then respond to the prompts.

ABC's of Adding a Person

People in WinSearch represent candidates, contacts and other people that you interact with in your business. Creating a record enters the information that you want to store on that person.

To add a person using the Person's Form:

1. Select the PERSONS | PERSONS FORM command to open a Persons Information form window.

2. Select the FILE | NEW command or click the New Record toolbar button (➕) to let WinSearch know that you are adding a person.

3. Select the category of person you are adding, if prompted. You can choose Contact, Contractor, Employee, Other, Permanent, or Temporary.

4. Make your entries in the different locations. You can press Tab and Shift+Tab to move from one entry to another. Some entries that are especially of note include:

   - Full Name—You can type the person's full name in a last name, first name or first name last name format. WinSearch will determine the components of the person's name.
   - Company—You can type the company's name of their current or last employer. If WinSearch shows a drop-down list for companies, WinSearch tries matching what you type to companies in your database. If no drop-down list appears, you can type part of the company name and press F2 to bring up a list of matching companies from which you can double-click the row header (the gray box at the beginning of the row). Linking puts a company number next to the company name. Just typing the company name may not. Linking is what makes WinSearch include that person as one of the company's employees. Linking also supplies the person's work phone number, work address and other company information.
   - Phone Numbers—You can type the telephone number and let WinSearch format the number for you. After the area code and local number, you can enter an exchange or any other description that is appropriate. Once you finish typing the phone number, press Enter to add it to the person's list.
   - Email Addresses—People can have as many email addresses as desired. The first one added by typing it and pressing Enter is marked as the primary email address. You can add descriptions after email addresses.
   - Addresses—You can enter both home and work addresses in the address entry. The W or H at the end of the first address line indicates whether you are looking at the home or work address. You can switch between the two by pressing Ctrl+Shift+S, by clicking the H/W button, or by selecting the EDIT | ADDRESS SETTINGS | SWITCH VISIBLE ADDRESS command.
   - Key Words—You can right-click the key word list box and select ADD KEY WORD from the popup menu. If the key word list box splits into two, just type the new key word and press Enter. If the key word list box does not split into two, you will see the Key Word Dictionary window where you can select the key word then click the SELECT button. When the key word list is not split into two, you can change a key word's weight (if this feature is turned on) by clicking the key word then pressing the + or − keys.
   - Status, Type, Class—These three entries may be any one of the predefined entries in their own LOV table. Status often indicates whether the person is a contact, a candidate actively looking for work or some other person that you are tracking. Type and Class can be used as your organization sees fit. Examples of uses include experience level, security clearances, and general industry experience.
   - User Defined Fields—These user defined fields are set up by the SYSADM user. If some have been set up, you can add values to those entries by right-clicking the user-defined box then selecting ADD NEW FIELD. Now the user defined field box divides to have two drop-down lists. In the first one, select which user-defined field you want. Then press Tab to move to the second drop-down list. Here you enter the value for the user defined field and press Enter. Your SYSADM user selects which user-defined fields are available and what type of entries you can make for the values.
   - Notes—Enter any other information that you need for the candidate that you do not put elsewhere. Notes can contain up to 15 single spaced pages of text. WinSearch will automatically add the date, time, and WinSearch user name when you display this entry in a Popup Editor (available by pressing Ctrl+F2 or clicking the Edit Notes/Popup Editor button ().

5. Switch to the subsidiary forms that contain the additional information you can store on a person. The commands that you can use to open these windows include:

   - View | Supplemental Data—Displays a form for entering other miscellaneous information.
   - View | Demographic Data—Displays a form for entering employment related information (if your SYSADM user has set up the option for entering data here).
   - View | Activity Links—Displays a list of other people, companies and job orders linked to this person. This is used more for existing people who have activities rather than for new people.

6. When you are finished entering the person's information, return to the main Persons Information Form.

7. Save the person's data by selecting the File | Save Changes command or by clicking the Save Changes toolbar button ( ).

Notes

- A person also has Detail Tables that are available through the View | Saved Detail Tables command. To add information to these Detail Tables, open the tables, then select the File | New Row command to add a new row, type the information, and then select the File | Save Changes command to save the data.
- Another method of performing steps 1 and 2 is to select the Persons | Add New Person Thru Form Window command or click the New Person toolbar button ( ).
- If you need a larger area to make a particular entry, press Ctrl+F2 or click this button . This opens the Popup Editor.
- You can create a person's record from a Persons Table. To do this, select the File | New command, enter the different pieces of information in each column, and then select the File | Save Changes command or click when you are done.
- A main person's record can store 85 different pieces of information. You only enter that information that you find useful. If you don't use a particular piece of information, don't enter it.
- When the person you are adding is a contact for a specific company, go to the company then select the File | New Employee command or click the New Person toolbar button ( ) or use that company's Contacts or Employees Detail Table. A person added here automatically has the company link and the company's address as their work location. People added in a Contacts Detail Table also have their category initially set to Contact.
- You can set your default person's category with the Settings | User Options | Persons Settings command. Then, you do not see the prompt for the category of person you are adding from within WinSearch. People added through Word and WSProcessor have their initial settings made through WSProcessor and those added through WSOutlook have their settings made there.
- A persons form initially shows the person's primary address. WinSearch initially sets the work address as the primary address for Contact category people and the home address as the primary address for everyone else. To switch which address is the primary address:
  - Select the Edit | Address Settings command then choosing Home Address is Primary or Work Address is Primary command
  - Right-click the H/W button and choose Home Address is Primary or Work Address is Primary
  - Select or clear the Home is Primary Address check box in the Supplemental Data form window
- Set your next contact dates by creating an activity on the chosen date with the Create Next Contact Activity toolbar button ( ). The Settings | User Options | Calendar Settings command chooses how this button behaves.
- People can be created from Outlook contacts by highlighting them and clicking the Export Contacts To Database toolbar button ( ).

ABC’s of Creating A Search

Searches identify the people, companies or job orders that match the criteria that you select. Another ABC’s topic describes how you can work the search list once you have identified the matching people, companies or job orders.

To create and execute a search:

1. Select the SEARCH | SEARCH FACILITY command to open the Search Facility window then select the FILE | NEW command or click the New Record toolbar button ( ).

2. Make the entries in the top part of the window. These entries include:

   - Description—Your quick reminder for the purpose of the search. Putting a description helps you later return to this search.
   - Owner—You can select whether this search is created for a person, company or job order by selecting one of the option buttons. Then, after Search Owner, type an entry if the down arrow appears at the end of the entry or press F2 to select the owner from the list and link it. Linking a search to an owner means this search appears as part of the person's, company’s, or job order's detail information and the owner's key words are added as search criteria.

3. Select whether the search will find people, companies or job orders by selecting the Persons, Companies or Job Orders option button on the right side of the Search Facility window (see Figure A).

4. Modify the search criteria. The search's existing criteria appear in the list box in the middle. The bottom half of the window is for adding criteria. Some of the changes that you can make to criteria include:

   - Add criteria—Select the type of criteria to add (key words, home state, etc.) from the list box in the lower left corner. Double-clicking the item displays all the values for that item on the right. When you double-click a value, you add that criterion to the search.
   - Delete criteria—Double-click the criteria in the middle section of the window.
   - Switch between required and desired—Select a criteria item in the middle of the window then click the R <=> D button to switch the criteria between required and desired. Required criteria are like hurdles—if you don’t get past all the hurdles, you don’t get to the finish line. Desired criteria are like gold stars—the more you get the higher you are in the list, assuming you pass through all the hurdles as well.
   - Change the required weight of a key word (if key word weighting is enabled)—Click the key word in the middle section of the window then press the + or − keys. When the key word is 0, you do not see the >=(number) at the end of the key word. A value of 0 means that any person with that key word matches the criteria. A value greater than 0 means that the criteria only matches people whose own weight for the key word meets or exceeds the criterion’s weight.
   - Join criteria with OR—To find people meeting one criterion OR another (such as living in Florida or Georgia), add both criteria. Then click the second criteria in the middle of the window and click the OR button. Criteria joined like this might look like:

	Req	*	Home State	=	FL
OR	Req	*	Home State	=	GA

5. Execute the search by clicking the EXECUTE button or select the EXECUTE! command.

6. Once the search executes, you see the dialog box documenting the search's progress and results. Depending on your settings, the completed search will either display the results or leave the dialog box for you decide whether to build the list. Click the BUILD LIST button if necessary and the Search List Detail Table opens. If the number returned is too low, change some of the criteria from required to desired. If the number is too high, change some of the desired criteria to required or add additional criteria.

Notes

- The search criteria should be a laundry list of everything you want the candidate to have. You make your search results broader or narrower by choosing which criteria are required versus desired. Including all the criteria that interests you lets WinSearch prioritize the list for you.

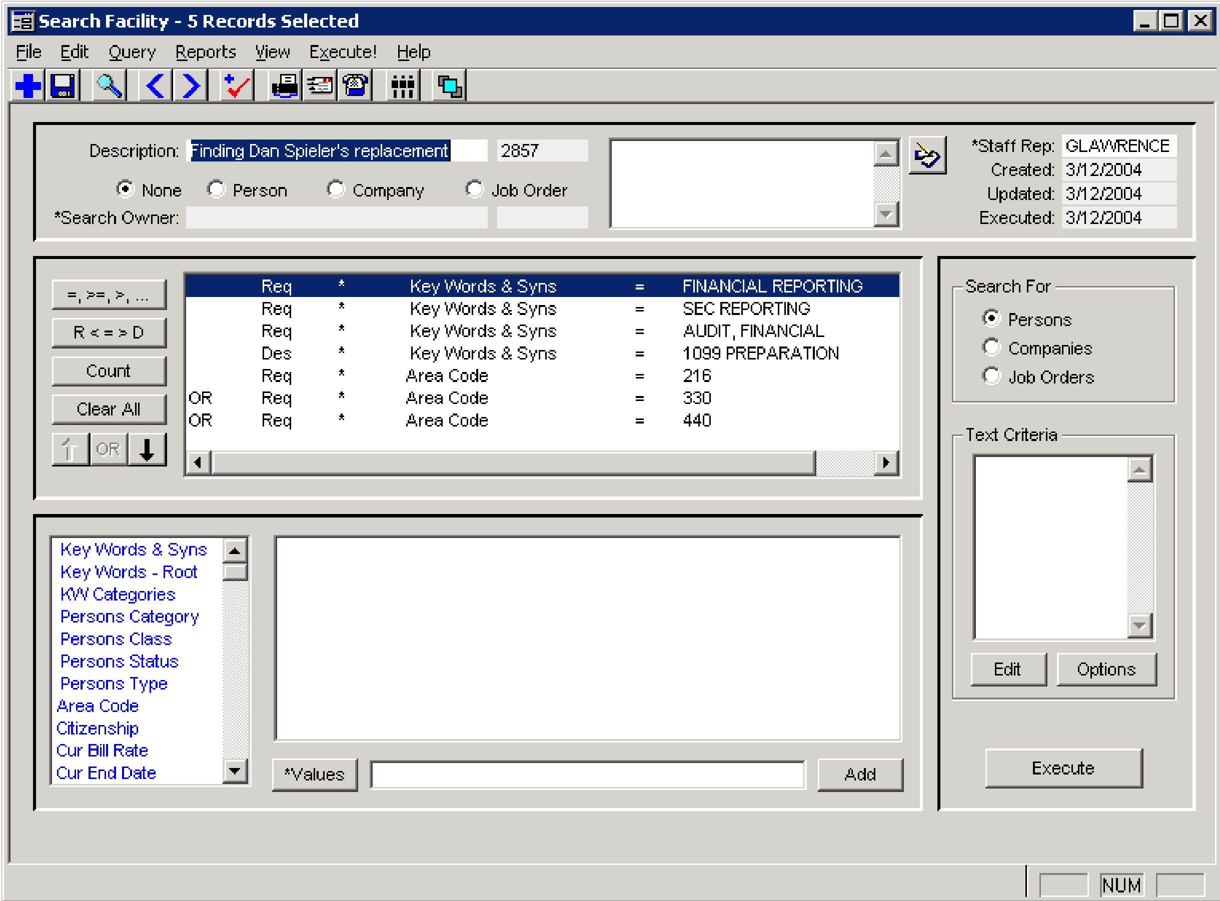


Figure A: Search Facility window for a search and its criteria

- A search will return up to 200 matching people, companies or job orders that meet the criteria. This limit can be set to a different number by SYSADM using the SETTINGS | SYSADM OPTIONS | MISCELLANEOUS OPTIONS command.
- Once you execute a search, its search list remains in the database until you explicitly remove it. You can do this with the FILE | DELETE SEARCH command.
- To get an idea of how many people, companies or job orders match the different search criteria, use the COUNT button. This button reports the number of matches for each criterion.
- You can only use criteria effectively if you have entered that type of information. For example, you can use educational information as search criteria for people but only if you have entered educational information for people in their Educational Detail Table.
- Some of the changes that you make to a search's criteria can be made by highlighting the criteria then right-clicking it. The popup menu that WinSearch displays contains commands for most of the changes that you might want to make for existing search criteria.
- Criteria for ZIP code distances requires two entries as in 15/44145 or 15 44145. The first number is the number of miles (as the bird flies) and the second number is the ZIP code. WinSearch measures ZIP code distances between the centers of a ZIP code rather than the actual address.
- If you need to find specific text in long text entries such as WSResume resumes, notes and activity notes, you need to use the Text Criteria section. Using this feature is described in the WinSearch Users Guide.

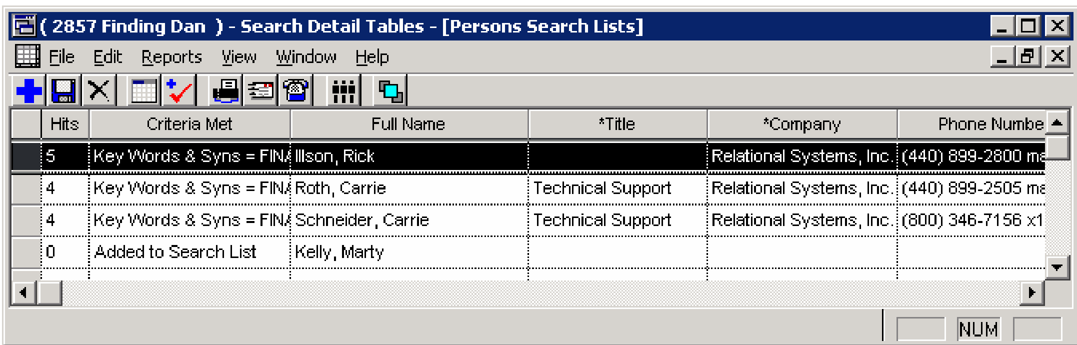
ABC's of Working a Search List

Once you have created and executed a search, you are ready to go through the list. Use the list as a worksheet for all the people, companies or job orders that you are considering for the position. Use the search's criteria to prioritize your list. As you work on the list, eliminate unqualified ones, add newly discovered ones, and make your notes as part of each record.

To work a Search List:

1. Locate the search record you have executed and that you want to review. You can do this either from the Search Facility form or Search Window.

2. Select the VIEW | SEARCH LIST command or click the Search List toolbar button ( ) if necessary. This opens a window containing the Search List Detail Table for the selected search. The table shows people, companies or job orders depending upon what you selected to search for. You will see a table like this:



   This table prioritizes the matches returned by the search. First, they are listed in order by the Hits column. This column counts the number of required and desired criteria that each listed item met. Then they are listed alphabetically.

3. Work with the people, companies or job orders in the table. From this table, you can:

   - See the criteria that the person, company or job order met in the Criteria Met column.
   - Modify the information. You can directly change the people, companies or job orders in this window. You can also open the main window by double-clicking the row header (the box at the front of the row).
   - When you right-click a person, company or job order in a search list, you get the same popup menu that you see when you right-click a row in a Persons, Company or Job Orders table window.
   - Add new items to the search list. For example, when the search list contains people, as you contact people on the list, you may get referrals to new people. You can add people, companies or job orders to a search list by selecting the FILE | NEW command or clicking the New Record toolbar button ( ). Then, add the new person, company or job order just as if you are in a main Persons, Company or Job Orders table window.
   - Add existing people, companies or job orders to the search list. Select the FILE | ADD DATABASE RECORD TO LIST command to open a Persons, Company or Job Orders table window. From this window, you can query to find the person, company or job order that you want. Once you find the one you want, choose the SELECT menu command to add them to the search list. You can add multiple people, companies or job orders by continuing to query to find them then choosing the SELECT menu command to add them to the search list. Close the table window when you are done.
   - Remove people, companies or job orders that you do not want on your list. Click their row header then press **Delete** or click on the Mark for Deletion toolbar button ( ). After you mark the ones that you want to delete, select the FILE | DELETE MARKED RECORDS command to remove them from the list.
   - Open other windows such as the Detail Tables. Figure A shows how you can rearrange the windows. When you open these windows from the Search List, these windows focus on the person, company or job order selected in the Search List. Select another row in the Search List and WinSearch updates the information in the other windows.

- Look at their resumes when the search lists shows people. Right-click the row then select WSRESUME from the popup menu to display the currently selected candidate's resume. **Important: Move the WSResume window so you can see the candidate names on the search list. Then, as you click each person in the search list, WSResume shows the currently selected person's resume.**

Notes

- The Search List remains intact until you re-execute the search. This means that you can put the Search List away and return to it later. If you need to update an old search to include new entries, have the search include Resume Created and Resume Updated as search criteria.
- Initially spend a few moments to check that the people, companies or job orders that are in the Search List are what you want. Criteria that are too strict overlooks qualified matches while criteria that are too broad waste your time by listing unqualified ones.
- Prune your search list *before* you start making calls. Pruning the list ahead of time makes you more effective because you do not waste time talking to the wrong people.
- The RD column contains D for those who met all required and desired criteria, P for those who met all required and some desired criteria, and an R for those who only met all required criteria.
- The ZIP Distance column contains the zip code between the item's address in the list and the ZIP code used for the search.
- Search Lists and Saved Lists have many similarities in how they work. The substantial difference is how the

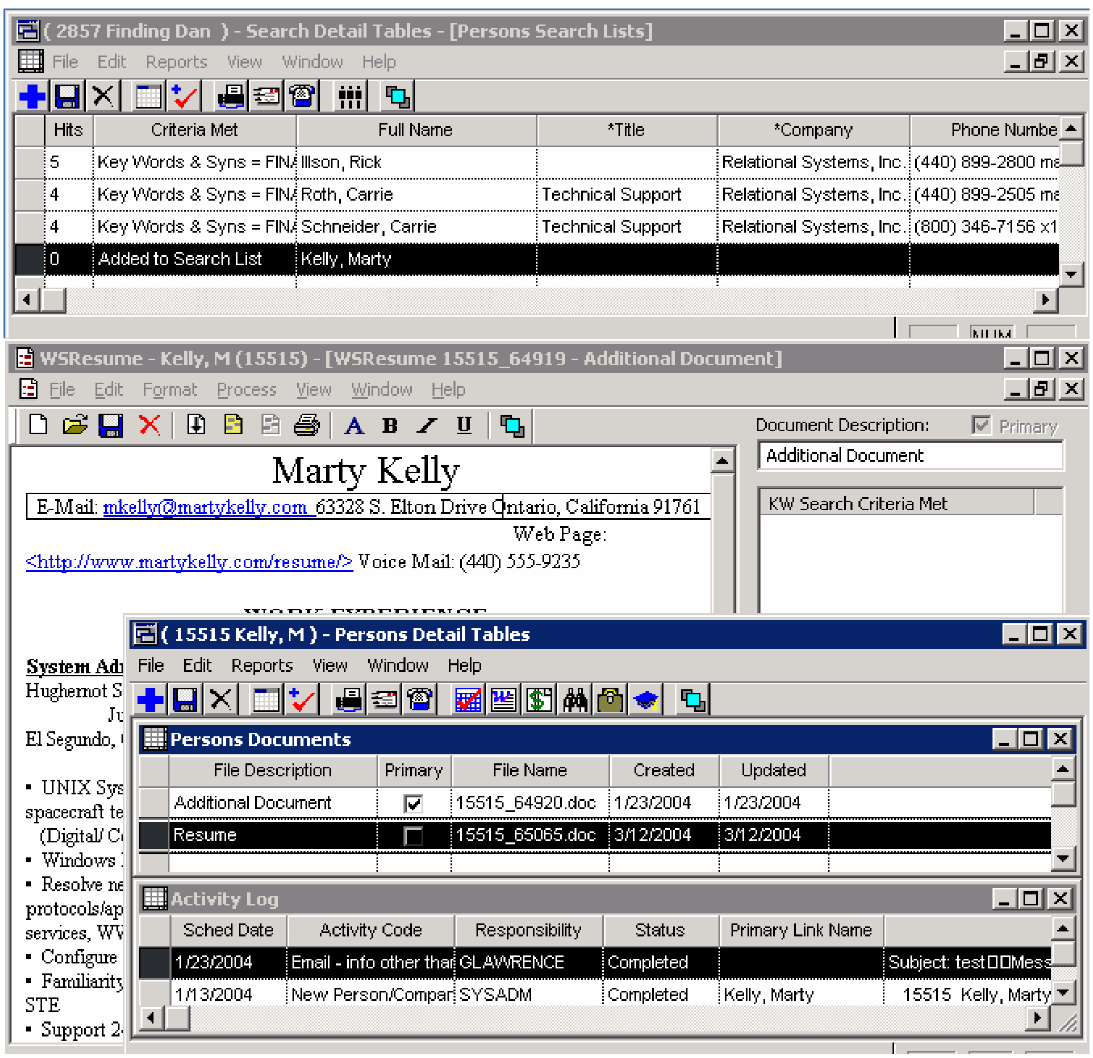


Figure A Search List with other windows open

lists initially are filled—Search Lists start off with the people, companies or job orders that match criteria; Saved Lists only have people or companies added explicitly by a user.

ABC's of Creating an Activity

Creating an activity creates an activity record that records the who, what and where of something. By changing what information you provide, you set whether an activity is recording a historical event or a reminder of some future event or task. Activities have many entries: you complete only the parts that are relevant to what you want recorded. Some of the activity's items are described in greater detail in Chapter 14, "Activities and WinSearch's Calendar."

To create an activity:

1. Press F9 or click on the Create Activity toolbar button ( ) to open the Activity Records dialog box. Figure A shows this dialog box after several entries have been made.

2. Select an activity code from the Activity Code drop-down list box that describes the type of activity that you are recording. For example, to schedule an interview for a candidate, you will select a value such as '1st Interview.' The SYSADM user sets up these activity codes using the steps described in detail in Chapter 14, "Activities and WinSearch's Calendar."

3. Put in any appropriate Subject entry. If left empty, WinSearch puts the activity code and the primary link name.

4. Enter any notes either by typing in the Notes text box or by clicking the Popup Editor button ( ).

5. Enter the date and time for this activity in the Sched. Date, Starting and Ending text boxes. The date and time may be when the activity occurred or when you want it to occur. You can leave these entries empty if it is something that does not have a date or time.

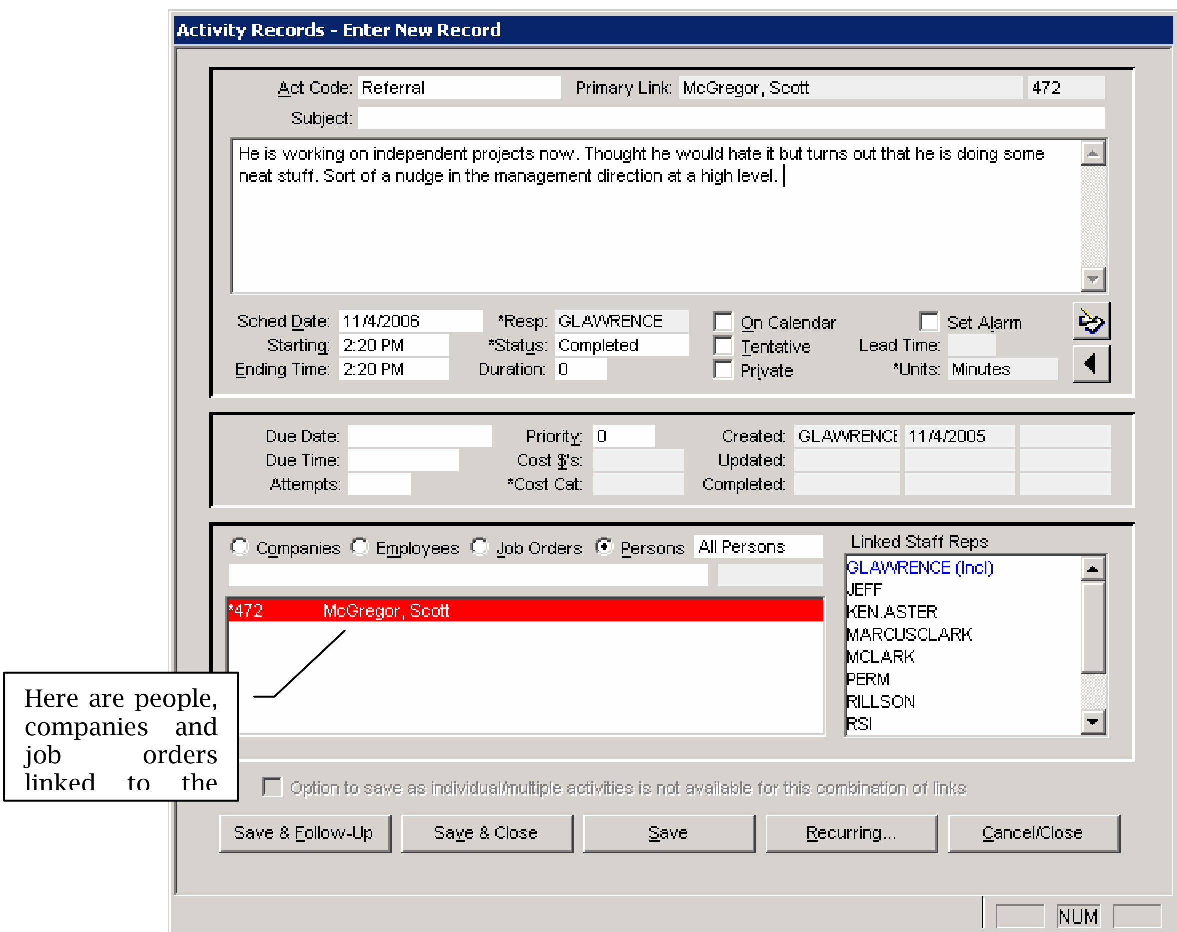


Figure A Activity Records form for creating activities

6. Enter the Status entry. Status differentiates activities to show the type of future or past action expected. SYSADM sets up the choices and the initial entry based on the chosen activity code.

7. Set any appropriate options. On Calendar indicates activities to display in the Daily Calendar and Monthly/Weekly Calendar. Tentative indicates that the activity is not confirmed. Private indicates that you do not want other WinSearch users to see it. Due Date and Time tracks when activities need to be completed. Attempts is a counter for tracking attempts. Priority sets a priority value for the activity. Cost and Cost Category track any cost associated with the activity. Some of the choices may not appear if the activity window is shrunk using the ◀ button.

8. Choose whether you want an alarm for this activity using the Set Alarm check box. When turned on, you can enter how much time before the activity's start time that you want the alarm.

9. Link the activity to any appropriate persons, companies, or job orders. To create each link, click on the Companies, Employees, Job Order, or Persons option buttons. The Employees option button differs from the Persons option button because it only lists people at the companies that you have already selected. With Persons, you can choose which category of person is available through the text box below. Then in the text box below, if the text box has a down arrow at the end of it, you can start typing the name until WinSearch finds a match or you can select it by opening the drop-down list and selecting one of the entries. Pressing Enter adds that item to the list box below. If the text box does not have the drop-down arrow at the end, you can type the beginning of the name then press F2 to see a list of all matching items. The related LOV Table opens. From here, you can show all records or query to show the one you want. Select the record that you want linked to the activity.

10. Enter the WinSearch users involved with the activity. You are automatically included in the list but if you are setting up an activity for someone else, you will want to change which name(s) are selected. You can click each person to add or remove the highlight from their name. The Resp entry also tracks users but it picks the primary user responsible for the current activity.

11. Once the activity is completed, click the SAVE button to save the activity and close the window.

Notes

- You can increase or decrease many of the activity's entries by pressing + or −. For date and time entries, if the entry is empty, pressing + or − first inserts the current date or time. WinSearch accepts many formats for time entries. For example, to enter 2:30 PM, you can type: 2:30, 14:30 02:30, 2:30 PM or 02:30 PM. Whole hours can be entered as 5 or 17 for 5:00 PM. When you do not include the AM or PM, WinSearch determines whether to add AM or PM based on the starting time of the day. With the Date entry, you can click the down arrow at the end of the entry (▾) to see a calendar popup and select a date.
- WinSearch automatically adds any person, company or job order that logically makes sense based upon where you start the activity. For instance when you are at a person, that person is linked in the activity. When you are at a job order, the job order is linked as well as the job order's company, hiring manager and HR manager. When you link an activity to a company contact, WinSearch also brings in that person's company.
- WinSearch uses different colors to indicate people, contacts, company and job order links in activities. Red for candidates, dark blue for contacts, light blue for companies and green for job orders. You can switch a person in an activity between being a contact or candidate using the TOGGLE CONTACT/CANDIDATE FLAG command in the popup menu.
- From the list of links, you can open any of the listed items by double-clicking them. This is the same as right-clicking the item and choosing LOOKUP THIS ITEM from in the popup menu. From the popup menu, you can also select the other commands to remove the selected linked item, remove all of them or open a LOV table where you can select another person, company or job order to link to the activity.
- When you select one of the SAVE buttons, WinSearch checks that it has all the necessary entries. Certain activity codes require that certain links be included. For instance, an Interview With Client activity may require a candidate, contact and company as minimum requirements. If you try creating an activity with missing required links or other information, WinSearch displays a message reminding you of what is missing.
- Activities appear in any of these locations: Daily Planner, Daily Calendar, Monthly/Weekly Calendar, Activity Logs, Activity Table and Activity Links. Each of these ways to look at activities fulfills different purposes to find the activities you have performed as well as those still to do.
- Next contact dates are tracked as activities. Create them by by left or right-clicking the Create Next Contact Activity toolbar button ( ) and choosing a date. The difference between left and right-clicking is whether or not you see the Activity Records window.
- Activities transferred to Outlook (and potentially a PDA) are transferred using the Synchronize toolbar button ( ) in Outlook.

ABC's of Shortcut Keys and Toolbar Buttons

Here are WinSearch's shortcut keys and toolbars. WinSearch does not care whether you press the shortcut key, click the toolbar, or select the menu command. Therefore, use the one that is the most convenient. With toolbar buttons, you can point to it to see a description of its name and a description of its function in the status bar at the bottom of the window. You can also see the shortcut keys next to the menu commands that they perform.

WinSearch Shortcut Keys

Menu Command	Keystroke
Help | Help	F1
Help | Columns	Shift+F1
Edit | List of Values	F2
Edit | Popup Editor	Ctrl+F2
Persons | Lookup Any Person By Name, ID or Email	F3
Persons | Persons Form	Ctrl+F3
Persons | Persons Table	Shift+F3
Persons | Lookup Candidates By Name or ID	F4
Persons | Candidates Form	Ctrl+F4
Persons | Candidates Table	Shift+F4
Persons | Lookup Contacts By Name or ID	F5
Persons | Contacts Form	Ctrl+F5
Persons | Contacts Table	Shift+F5
Companies | Lookup By Name or ID	F6
Companies | Company Form	Ctrl+F6
Companies | Company Table	Shift+F6
Job Orders | Lookup By Description or ID	F7
Job Orders | Job Order Form	Ctrl+F7
Job Orders | Job Order Table	Shift+F7
Search | Lookup By Description or ID	F8
Search | Search Form	Ctrl+F8
Search | Search Table	Shift+F8
Calendar | New Activity	F9
Calendar | Daily Planner	Shift+Ctrl+F9
Calendar | Daily Calendar	Ctrl+F9
Calendar | Monthly Calendar	Shift+F9
Settings | Send Fax	F10
Settings | Send Email	F11
Settings | Phone Controls | Telephone Dialer	F12
File | New	Ctrl+N
File | Save Changes	Ctrl+S

Menu Command	Keystroke
File | Delete Marked Records	Ctrl+D
File | Exit	Alt+F4
Edit | Undo	Alt+Backspace
Edit | Copy	Ctrl+Insert
Edit | Cut	Shift+Delete
Edit | Paste	Shift+Insert
Edit | Clear	Delete
Edit | Address Settings | Switch Visible Address	Shift+Ctrl+S
Edit | Map Mailing Address | Map Primary Address (persons) or Map Billing Address (Job Orders)	Shift+Ctrl+M
Edit | Map Mailing Address | Map Home Address (persons)	Shift+Ctrl+H
Edit | Map Mailing Address | Map Work Address (persons) or Map Work Location (Job Orders)	Shift+Ctrl+W
Query | Select All Records	Ctrl+A
Query | Query By Example	Ctrl+Q
Query | Clear QBE Criteria	Ctrl+B
Query | Execute QBE Query	Ctrl+X
Query | Cancel QBE Mode	Ctrl+M
Query | Set Sort Order	Ctrl+O
Query | Advanced SQL Query	Ctrl+W
Query | First Record	Ctrl+F
Query | Last Record	Ctrl+L
Query | Previous Record	Shift+Ctrl+P
Query | Next Record	Shift+Ctrl+N
View | Toggle Window Font	Ctrl+G
View | Column Settings	Ctrl+E

Other Keys

Move to Next Entry	Tab
Move to Previous Entry	Shift+Tab
Displays contents of drop-down list	Alt+↓
Cycles through the open WinSearch windows	Alt+1

WinSearch Toolbar Buttons

Toolbar Button	Purpose
New Record	Adds a new record
Save Changes	Saves the changes
Mark for Deletion	Marks records in a table to be removed when you delete
Previous Record	Shows previous record in a form
Next Record	Shows the next record in a form
Query by Example	Starts QBE mode to enter examples of data you want returned
Execute	Executes a QBE to show the records that match your examples
Create Activity	Creates an activity linked to a person, company, and job order
Create Next Contact Activity / Select Reschedule Date	Creates a next contact-type of activity based on the person, company or job order currently selected. In the Daily Planner, selects a new date for the activity.
Send Fax	Sends a fax
Send Email	Sends email to a person
Open Dialer	Opens WinSearch's Dialer window
Activity Links	Displays a dialog box summarizing up to three types of activities
Supplemental Data	Shows the Supplemental Data form for a person, company or job order
Addresses	Shows the job order's Addresses form
WinSearch.Jobs Web Recruiting Options	Opens the WinSearch.Jobs Web Recruiting Options dialog box for posting job orders to 3rd party sites
WSResume	Opens WSResume to view or edit a person's resume(s)
Saved Detail Tables	Opens the person, company, job order, or search's detail tables
Activity Log	Opens a person's, company's, or job order's Activity Log detail table
Documents	Opens a person's or company's Imported Documents detail table
Job History	Opens the person's Job History detail table
Education	Opens the person's Education detail table
Contacts	Opens the company's Contacts detail table
Employees	Opens the company's Employees detail table
Search List	Opens the Search List detail table for a search
Pin	Prevents windows related to the open one from being placed on top
Unpin	Allows other windows to be placed on top of this window
New Person From Clipboard	Creates a persons record using text previously copied to the Clipboard
Lookup Any Person / Persons Form	Displays dialog box to select a person to find/Opens the form for the person selected in the table
Lookup Companies / Company Form	Displays dialog box to select a company / Opens the form for the company selected in a table

Toolbar Button	Purpose
Lookup Job Orders / Order Form	Displays dialog box to select a job order to find / Opens in a form the job order selected in a table
Lookup Searches / Search Form	Displays dialog box to select a search to find / Opens in a form the search selected in a table
New Person	Opens the Persons form set up to create a new person
New Company	Opens the Company form set up to create a new company
New Job Order	Opens the Job Order form set up to create a new order
New Search	Opens the Search form set up to create a new search
Daily Planner	Displays Daily Planner
Daily Calendar	Opens the Daily Calendar window
Monthly Calendar	Opens the Monthly Calendar window
Application Toolbar	Displays WinSearch's toolbar as an application toolbar
Main Menu	Displays menus for all of the items in WinSearch's main menu bar
Show Choices	Shows the possible choices for an incoming telephone call
Edit Activity	Opens activity form window
Mark Completed	Marks activity completed
Mark Completed & Follow Up	Marks activity completed and creates a follow up
Create Follow Up	Creates follow up activity
Check For New Alarms On/Off	Turns off polling for new alarms
Check For New Alarms On/Off	Turns on polling for new alarms
Add Attempt/Select Reschedule Date	Adds 1 to Attempts then shows calendar to pick new date
Reschedule Ahead One Month	Sets activity date ahead one month
Reschedule Ahead One Week	Sets activity date ahead one week
Reschedule for Tomorrow	Sets activity date to tomorrow
Close Window	Closes the current window
Flashing On/Off	Turns alarm flashing on and off
Edit Notes/ Popup Editor	Opens Popup Editor window
Print	Prints current Calendar window
Previous/Next	Moves Calendar windows forward or backward or switches between displayed alarms
Select Records	Refreshes Daily Planner window
Select All	Displays all entries in the table
Snooze	Opens window for snoozing alarms
Turn Off	Turns off an alarm

ABC's of the Lookup Menu Commands

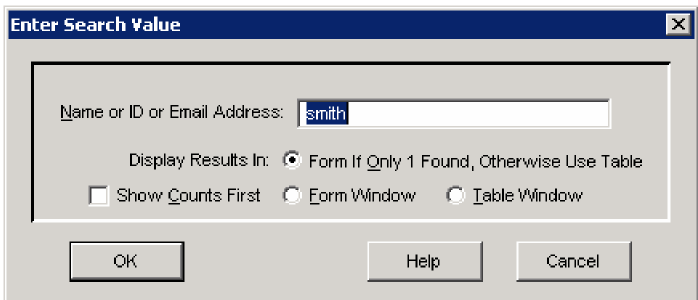
The Lookup menu commands quickly and easily retrieves specific records from the database. It creates impromptu queries on the database using your responses to dialog box prompts as criteria. WinSearch has several Lookup menu commands. The different menu commands can find different types of information. For example, the Lookup menu commands in the Persons menu opens the persons form or table window with the people that you select.

To return information using the Lookup menu:

1. Select Persons, Companies, Job Orders, or Search for the type of information you want returned.

2. Select the Lookup command representing how you want to choose information. Each of the menus has different Lookup commands that are appropriate to the information that you want to find.

   For example, select Lookup By Company Name or ID to look up companies by their name. You will see a dialog box prompting you for what you want to find. Here is a sample of what one of these dialog boxes looks like:



3. Enter any information in the dialog box displayed. The information requested depends on how you are selecting information. For example, when you select the Job Orders | By Company Name, enter the company name whose job orders you want to see.

4. Select OK to see the list that you selected.

Notes

- You do not have to pay attention to upper or lowercase letters; WinSearch will find the data regardless. WinSearch handles any necessary case conversions.
- You do not need to close a window to use the Lookup menu. For instance, if the Persons table is open, you can leave it open while you select another Lookup menu command that returns people. You will see a prompt letting you know that the window is already open and asking if you want to use that copy. Selecting Yes will replace the people on the list with the new group of people that you select. Selecting No opens a new window for the newly chosen people.
- For some Lookup options, you can choose which staff representative is used to select the information. You can also press **Delete** to not include the staff representative as criteria for the information you are selecting.
- Person's last names, company names, job order descriptions and search descriptions do not require the full entry because the Lookup command implicitly adds a % wildcard character to whatever you enter. This is why you can type spec to find Spechalske without having to remember how to spell the last name.
- You can also type OR in what you are looking for. For example, typing ander or johns when looking up people by their last name finds people whose last name starts with Ander or Johns.
- For finding people by their name, you can enter any acceptable full name entry. For example, to find Andrew Smith, you can enter **a smith** or **smith, a** for the entry. When you provide two words and no comma, WinSearch assumes that you have given it the first name and last name. If you provide two words separated by a comma, WinSearch assumes that the first word is the last name and the second is the first name. You can also enter a comma and a first name as in ,stefani to find people strictly by their first name.
- When a form or table window is open showing the results of a Lookup command, you can add new entries to the table even if they do not match what you entered for criteria.

- When you look up by phone numbers, you do not need the formatting characters. Once you select OK, WinSearch will verify that WinSearch understands what you are looking for in a phone number. You can also use the QUERY | TELEPHONE NUMBER command in the persons or company form or table window to find people and companies by phone numbers.
- Looking up people also works for their email address. If your entry contains the @ sign, then WinSearch believes that you are looking up people by their email address. You can provide an entire email address as in **help@winsearch.com**, **help@**, or **%@winsearch.com**. The last example finds all email addresses in the winsearch.com domain.
- WinSearch has several function keys that you can press in most WinSearch windows to perform lookups. These function keys and the LOOKUP menu command that they perform are shown here:

Function Key	**Lookup Menu Command**
F3	PERSONS | LOOKUP ANY PERSON BY NAME, ID OR EMAIL
F4	PERSONS | LOOKUP CANDIDATE BY NAME OR ID
F5	PERSONS | LOOKUP CONTACT BY NAME OR ID
F6	COMPANIES | LOOKUP BY NAME OR ID
F7	JOB ORDERS | LOOKUP BY DESCRIPTION OR ID
F8	SEARCH | LOOKUP BY DESCRIPTION OR ID

ABC's of Creating Simple Queries

When you want to work with a particular person, company, job order, search or activity, you need to display it. To display the information on any one of these entities, you retrieve it by creating a query. The easiest queries to use are called "Query By Example." In Query By Example, or QBE, you provide an example of the data that you want returned. When you execute the query, WinSearch returns all records that match the information that you have provided.

To return records that have the example that you provide:

1. Open the form or table of the type of data that you want as a result. Queries behave the same way whether you are querying from a table or form. Queries also operate the same way for persons, companies, job orders, searches, and activities.

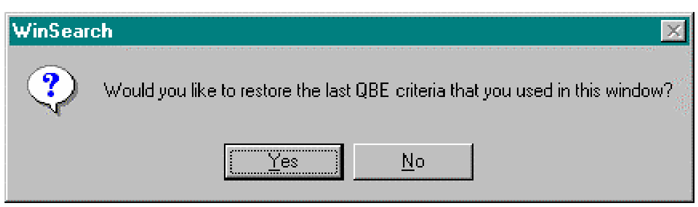
2. Select the Query | Query By Example command or click the Query By Example toolbar button (QBE). The window's title bar now shows "Enter Query."

3. Type the entry that you want to find in the location on the form or table where that entry will appear in matching entries. For example, when you are looking for companies in Ohio, you can move to the State column in the table or the State/Province slot in the Company form window and type **OH**.

4. Click the Execute QBE toolbar button ( ), or select the Query | Execute QBE Query command. The form or table now shows all records that have the same entries as the ones that you entered. Since forms only show one record at a time, use the Previous Record ( ) and Next Record ( ) toolbar buttons to switch between the records returned by the query.

Notes

- Make your query as specific as possible so it performs faster.
- You cannot perform QBE queries on some entries such as key words, phone numbers, user-defined fields and notes. These entries are unavailable in QBE mode. Use searches instead.
- To remember to execute the query once you have provided the example that you want matched, think of the Execute QBE toolbar button ( ) as the "Shazam" button.
- To set the order that records are returned to you, select the Query | Set Sort Order command. Find the field names in the list box that you want to use to organize your records and double-click them to add them to the list. Select Execute. You can also change the order in a table window by clicking the column heading whose values you want listed in ascending or descending order.
- Depending on how WinSearch is set up, when you select the Query | Query By Example command or click the Query By Example toolbar button (QBE) again, you may see this message:

  Select Yes to have the entries that you provided with the last QBE returned so you can use them again. Select No to start QBE mode fresh with no entries remaining from the last QBE. Select Cancel to leave QBE mode without executing a query to select records. You can set whether QBE criteria are restored with the Settings | User Options | General Settings command.
- The entries for the QBE can include the % and _ characters. The % character can represent zero or many characters. For example, if you are looking for Digital Equipment Corporation as a company name, you might type **Digital %** to match all companies that start with Digital. The _ (underscore) character represents any single character as in typing **Mar_** as a QBE example for the first name to match Mark and Marc. Be careful about being too general. When you type an entry like S% to find all last names that start with S, the query takes longer to execute and you must scroll through all the records where the last name starts with S to find the one you want. Most text entries assume that you want a % at the end so just typing Smith for the last name will find Smith and Smithfield.

- If you want the title bar to include a count of how many people are listed, choose the Settings | Display Options | Messages command and check the Show Result Set Counts check box.
- You can query on two values for an entry by using OR. For example, you can enter Smith Or Johnson for Full Name or Last Name to find people whose last name is Smith or Johnson.
- When you have multiple entries, they are joined by AND. For example, to find Smith working at Apple with QBE, you can move to Full Name and type Smith then move to company and type Apple. You can expand this to also include your WinSearch login name for Staff Rep. As another example, suppose you want to find your company contacts at Arthur Anderson and you are user RSI. The entries you might make into a Persons table might look like the window shown here:

ID	Full Name	Category	*Company	*Staff Rep
		contact	Arth	RSI

When you execute the query, your results might look like this:

ID	Full Name	Category	*Company	*Staff Rep
309	Barnett, Melissa, Ms.	Contact	Arthur Anderson & Co.	RSI
287	Taroria, Wesley F., Mr.	Contact	Arthur Anderson & Co.	RSI
274	Thompson, Donald K., Mr.	Contact	Arthur Anderson & Co.	RSI
290	Yeats, William N., Mr.	Contact	Arthur Anderson & Co.	RSI

- WinSearch can also easily find the desired records using memorized queries. Memorized queries take an advanced SQL query and save the settings, including whether or not to display it on the menu. Once the memorized query is set up and displayed on a menu, you just select the menu command to retrieve the records selected by the memorized query. Memorized queries can be set up to appear when you select the Query | Memorized Queries command or select the Memorized Queries command from the Persons, Companies, Job Orders, Search, Calendar, or Lists menu. Setting up memorized queries is described in the WinSearch User's Guide in Chapter 6, “Finding Records in WinSearch.”
- Besides using the Activities table to find desired activities, you can often choose the ones you want in the Daily Planner window using the selection items in the upper left corner. Once you have the activities selected in the Daily Planner or activities table window, try the Breakdown Graph reporting for management reporting needs!

ABC's of Printing Reports

WinSearch's has many standard reports. The specific reports depend on the window you have open and which other windows you open before printing the report.

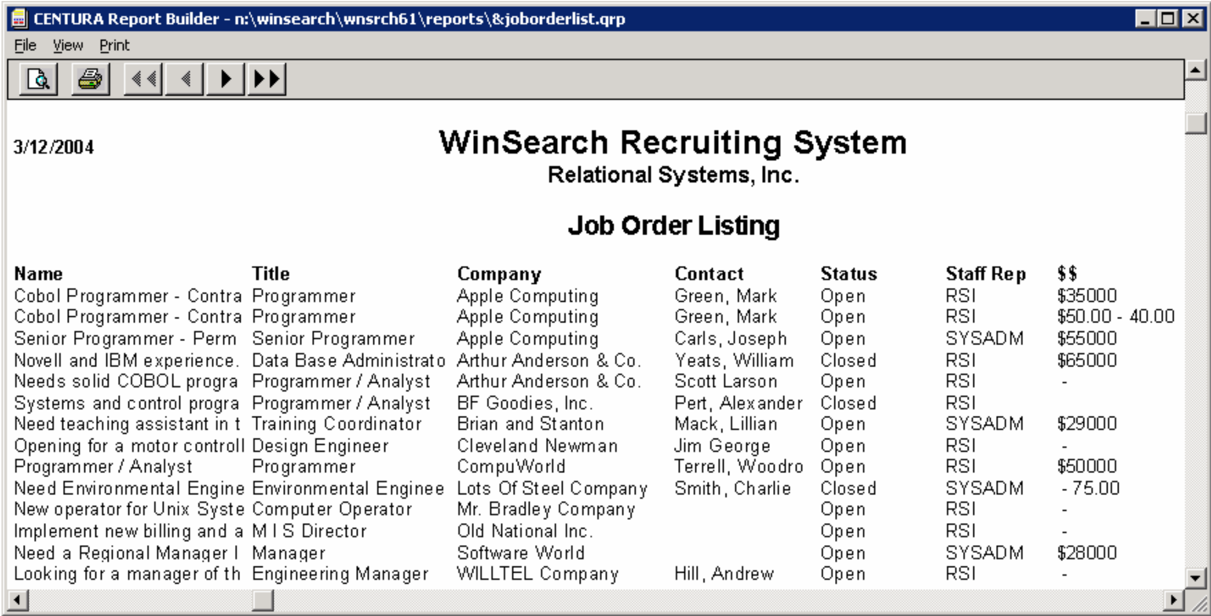
To print a standard WinSearch report.

1. Select the information to print. To do this:
    - Using the LOOKUP menu commands to select the people, companies, job orders, searches, or activities.
    - Using the Query By Example feature in a table or form window to select the people, companies, job orders, searches, or activities.
    - Using the QUERY | ADVANCED SQL QUERY command in a table or form window to select the people, companies, job orders, searches, or activities.
    - Use the QUERY | MEMORIZED QUERIES command or one of the MEMORIZED QUERIES command in the PERSONS, COMPANIES, JOB ORDERS, SEARCH, CALENDAR, or LISTS menu then select the specific memorized query to retrieve those records displayed by the memorized query.
    - Open the Detail Tables containing the data that you want printed. You can print starting from these Detail Tables: Contacts, Employees, Job Orders, Searches, Search Lists, and Activity Logs.
    - Open the Daily Planner, Daily Calendar or Monthly Calendar window and select the desired data.
2. Open the Detail Tables for the people, companies, job orders or searches if you want to include that information in the report. Once the Detail Table window is open, you can use the VIEW menu to open the detail information that you want in the report and to close the information that you do not want.
3. Return to the original window containing the people, companies, job orders, searches, or activities you want printed.
4. Select the REPORTS | STANDARD REPORTS command to open the Standard Report Options dialog box.
5. Select the type of report that you want to create from the REPORT FORMAT drop-down list box. The choices there depend on the data that you are printing.
6. Select PRINT to print the report or PREVIEW to show this report on the screen. WinSearch prompts a message to select YES or NO for whether you want the selected items or all of them printed or previewed.
7. Select YES to the prompt so the report only includes the selected row(s) or form. Select NO to the prompt so the report includes all selected rows or people, companies, job orders, searches, or activities shown in the form or table window.

Figure A shows a preview of a job order listing report.

Notes

- You can select multiple rows in a table to only include those rows in the report. Click on the first row then hold down the Shift key while you click on the other rows. Remember to select YES to the "Print/Preview Report for Selected Rows Only?" prompt.
- While previewing a report, you can use the toolbar buttons to work with the report. The button switches to the previous page while the button switches to the next page. The and buttons switch you to the first and last page respectively. When the report displays the information that you want, click the button to print the report.
- The REPORTS | PRINT WINDOW command also prints form and table windows. This command only prints the information that you can currently see in the window—the immediate contents that you see on your screen. You can use the table arranging features (described in "ABC's of Setting Up a Table") to select which columns print.
- You can alter the titles of the reports by selecting the SETTINGS | DISPLAY OPTIONS | REPORT TITLES command. Then you can enter new titles in the text box next to the different sections in the reports. Select the SAVE button when you are done to save your changes.
- You can print the report to a file. This feature is handy to create an RTF file of the report so you can include the report in another document. To create the report and print it to a file, when you create the report, select



Name	Title	Company	Contact	Status	Staff Rep	$$
Cobol Programmer - Contra	Programmer	Apple Computing	Green, Mark	Open	RSI	$35000
Cobol Programmer - Contra	Programmer	Apple Computing	Green, Mark	Open	RSI	$50.00 - 40.00
Senior Programmer - Perm	Senior Programmer	Apple Computing	Carls, Joseph	Open	SYSADM	$55000
Novell and IBM experience.	Data Base Administrato	Arthur Anderson & Co.	Yeats, William	Closed	RSI	$65000
Needs solid COBOL progra	Programmer / Analyst	Arthur Anderson & Co.	Scott Larson	Open	RSI	-
Systems and control progra	Programmer / Analyst	BF Goodies, Inc.	Pert, Alexander	Closed	RSI	
Need teaching assistant in t	Training Coordinator	Brian and Stanton	Mack, Lillian	Open	SYSADM	$29000
Opening for a motor controll	Design Engineer	Cleveland Newman	Jim George	Open	RSI	-
Programmer / Analyst	Programmer	CompuWorld	Terrell, Woodro	Open	RSI	$50000
Need Environmental Engine	Environmental Enginee	Lots Of Steel Company	Smith, Charlie	Closed	SYSADM	- 75.00
New operator for Unix Syste	Computer Operator	Mr. Bradley Company		Open	RSI	-
Implement new billing and a	M I S Director	Old National Inc.		Open	RSI	-
Need a Regional Manager I	Manager	Software World		Open	SYSADM	$28000
Looking for a manager of th	Engineering Manager	WILLTEL Company	Hill, Andrew	Open	RSI	-

Figure A: Preview window for looking at your report before printing it

the To File option button from the Standard Report Options dialog box. When you click PRINT, provide the filename then select SAVE.

- It may be tempting to print out reports of everything and work from the printouts. However, WinSearch's strength is enhanced when you work from the computer. That means that as you work through your call list, you open your list on the screen and update the person's information as you talk to them.
- SYSADM can set up memorized reports. A memorized report is a collection of settings including the report format, any memorized query to select the appropriate information, and whether specific Detail Tables should be included in the report. Once the memorized report is set up, you can create a memorized report using the MEMORIZED REPORTS command available under the REPORTS menu in a form or table window or in the PERSONS, COMPANIES, JOB ORDERS, SEARCH, CALENDAR or LISTS menu. Once you choose MEMORIZED REPORTS, choose the name of the desired memorized report then follow the prompts that you see.
- WSGraph can also print summary information on your people, companies, job orders and activities using criteria selected using dialog box options. The graphs that this utility can create have many formatting options although you cannot save your settings. This utility is started with the SETTINGS | UTILITIES | START WSGRAPH command.
- When printing management reports of activities, try the Breakdown Graph (or its landscape version) to see if it meets your needs.
- For Job Orders, the Job Order Listing report works well to summarize open jobs (and possibly counts of activities). However, this and any other landscape report sometimes does not correctly print sideways. In this case, you can print the report correctly by following these steps:
  - Select the REPORTS | STANDARD REPORTS command.
  - Select the specific report that you want form the Report Format drop-down list box.
  - Select the To File option button and leave the RTF file option button selected.
  - Choose PRINT.
  - Select a destination and name for the resulting file and select SAVE.
  - Select YES or NO to the YES/NO/CANCEL prompt for whether to include selected records in the report.
  - Open Word then open the document that you just previously selected and named in the previous step.
  - Select the FILE | PAGE SETUP command.
  - Select the Landscape button and then Whole Document under Apply To.
  - Select OK.

- Print the report in Word.

ABC's of Setting Up a Table

To use tables effectively, you need to arrange the tables so you see the data you need quickly. To help you do this, you want to move, size, hide and lock columns. The table settings can be made for the different table windows you use. Just remember to save the new window settings when you have what you want.

To hide, lock, move, and size columns:

1. Select the View | Column Settings command on any table. The Column Settings dialog box shown in Figure A displays.

   The first list box shows all of the hidden columns in alphabetical order. The second list box shows all of the visible columns that are not locked in the order that they appear in the table. The third column lists locked columns in the order that they appear.
2. Scroll through the Visible Columns list box and highlight the columns you want to hide. Each time you click a column name under the Visible Columns, Hidden Columns or Locked Columns list box, you are selecting or deselecting them. You can select as many of the entries as you want.
3. Click the < button between the Hidden Columns and the Visible Columns list boxes to move the highlighted column name from the Visible Columns list box to the Hidden Columns list box. Repeat this step for the columns that you want to hide.
4. Scroll through the Visible Columns list box and highlight the column(s) you want to lock.
5. Click the > button between the Visible Columns and the Locked Columns list boxes to move the highlighted column name from the Visible Columns list box to the Locked Columns list box. Repeat this step for each column that you want to lock.
6. Arrange the order of the column names in the Locked Columns list box to be in the order that you want them in the table window. Select a column name to move and click the Up or the Down button to move that column name up or down within the list.
7. Arrange the order of the column names in the Visible Columns list box to be in the order that you want them in the table window. Select columns to move and click the Up or the Down button to move that column name up or down within the list. The order that you see in the Visible Columns list box is the order that you will see

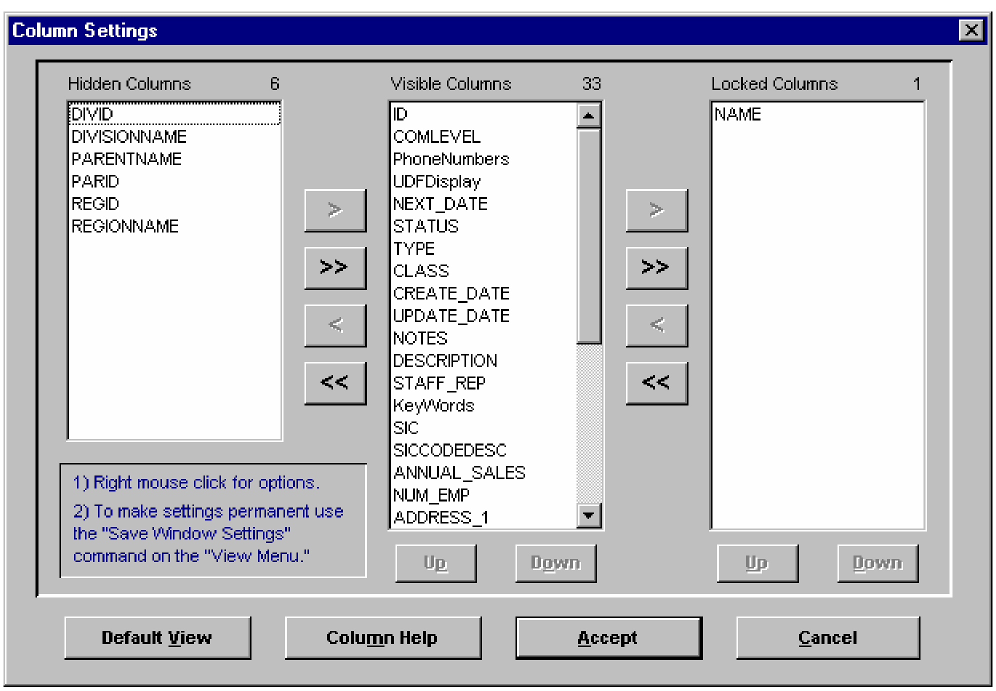


Figure A: Column Settings dialog box to hide and lock columns

in the table window.

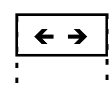
8. Select the Accept button to close the dialog box.

   At this point, your locked columns are locked and your hidden columns do not appear.

9. To change a column's width, point the mouse at the vertical bar to the right of the column title of the column you want to change. This vertical bar separates the column from the next column. When you point the mouse here, the mouse pointer changes to look like this: ↔. Hold down the left mouse button and *drag* the separator bar in the column heading left or right to the desired new width and release the left mouse button.

10. When the table window has the appearance that you want, select the View | Save Window Settings command. This must be done for each table or form you want saved.

Notes

- Users start with the window settings created by the SYSADM user. Therefore, SYSADM can create window settings to match what most users will want. Then the individual users can go in and modify their own settings to match their personal preferences.
- Hiding a column only prevents it from appearing on the table. Your data in that hidden column remains safe. To make the hidden column reappear, display the dialog box in Figure A, then move the hidden column from the Hidden Columns to the Visible Columns list box.
- Locked columns always appear on the left and remain visible in the window, even as you view columns further to the right. For example, you may want to lock FullName on the Persons table to always keep the name visible. *Only lock one or two columns in a table.* Put the other columns containing important data that you will want to the front of the table.
- In the Column Settings dialog box, you can click the << or >> buttons to move all columns in one list box to the next.
- In Detail Tables, when you save the window settings, you also save which detail tables are open and the automatic positioning option selected in the Window menu. Tables are opened or closed by selecting the table name in the View menu. You want to save Detail Table window settings when you have arranged the columns in the Detail Windows as well as opening those that you want opened most often. When you save the Detail Table window settings, you are saving the window settings for those Detail Tables that are open and ignoring window settings for those that are closed.
- 

  You can also move columns with the mouse. To move columns with the mouse, point to just below the column header so the mouse looks like the pointer shown to the right. Notice how the mouse is pointing to the area between the column heading and the first entry below it. If your mouse does not look like this, you are not in the correct position to move the column. Once the mouse is in this position, click then drag the mouse to the right or left for where you want to move the column. Release the mouse when the column is where you want.
- The Column Settings dialog box has a popup menu in the Hidden Columns, Visible Columns and Locked Columns list boxes. From this popup menu, you can quickly hide, show, lock and select groups of related columns. For example, in a person's table, the options work on a person's name, home address, and work address.
- The rows in a table can also have their height adjusted. When the mouse points on the row headers between rows, the mouse looks like a double arrow with a line through it. When the mouse looks like this, you can drag the mouse up or down to change the row's height. Longer entries such as notes will use the multiple rows. When you save the window settings, you are also saving the height for the rows.

ABC’s of Setting Up LOV Tables

The List of Values (LOV) Tables provide a list of available values to enter as an entry. You can display a LOV table to display all the entries and select the one you want. They can also link records together. You can open a LOV Table from any form or table where the entry heading includes an asterisk (*). Some WinSearch entries require that you enter one of the predefined entries that are on that field’s LOV table. For other entries, if it does not already exist on the accompanying LOV table, you will see a message that it does not and may have the option for adding it at that time.

To add a value from an LOV Table to an entry:

1. Move to where you want to insert an LOV Table value.
2. Press F2 or select the EDIT | LIST OF VALUES command to display the appropriate LOV Table. If you had typed anything before pressing F2 or selecting the menu command, the LOV table only lists the values that match what you have typed.
3. Find the LOV Table value you want.
4. Double-click on the row header, the little gray box, in front of the desired value or highlight the desired row and choose the SELECT! command.

When the entry where you want the LOV table entry includes a down arrow ( ), you can click on that down arrow and select the entry that you want from the list. You can also start typing what you want and WinSearch will try to match what you type to one of the entries in the list. When the value that you want is selected, move off of that entry.

When selecting from a LOV table creates a link, the LOV table value that you select may return more than one piece of information. For example, when you link a person to a company, WinSearch enters the company name, the phone number as the person’s work number, and the company’s address as the person’s work address.

To modify values in a LOV Table:

1. Open the LOV Table by pressing F2 in the appropriate field on a form or table, or using the LISTS menu available from the WinSearch main menu.
2. Make the changes you want. From the LOV table, you can:
   - Add values—Select the FILE | NEW command or click the New Record toolbar button ( ). Enter the new information. Then, save the new LOV table value by selecting the FILE | SAVE CHANGES command or the Save Changes toolbar button ( ).
   - Modify values—Move to the entry that you want to change and make your changes. Save the changes with the FILE | SAVE CHANGES command or the Save Changes toolbar button ( ).
   - Delete values—Click the row header (the small gray box) at the beginning of the row that you want to remove. Click the Mark for Deletion toolbar button ( ) to indicate which rows to remove. Finally, select the FILE | DELETE MARKED ROWS command to remove the marked rows from the table.
3. Select the FILE | EXIT command to close the window or double-click the LOV table value you want entered in a form or table.

Notes

- You can set which LOV table entries automatically include the down arrow ( ) to make the drop-down list available. Choose the SETTINGS | DISPLAY OPTIONS | LOV DROP DOWN OPTIONS command then double-click the LOV tables names. The ones in blue are the LOV table entries that automatically include the down arrow ( ) and WinSearch will try to match what you type to an existing entry in the appropriate LOV table. The entries in red do not have the down arrow and WinSearch's typeahead capabilities.
- When you open a LOV table, if you don’t find what you want, you can add it at that time, as described above.
- When you delete a LOV table entry, any person, company or job order that has that LOV entry still has that entry. On the other hand, if you change a LOV table entry, WinSearch takes care of adjusting that value for the people, companies and job orders that have that entry.

- Because of how WinSearch works with deleted and modified LOV table entries, if you need to merge two entries into one, delete the one that you are going to keep which does not change the entries for the people, companies and job orders that have that value. Then, change the other version of that entry into the one that you want to keep. That changes the old entry into the new one.
- In some of the LOV tables, you will notice that you cannot add, modify, and delete their values. For these tables, SYSADM is the only user that can modify these tables. SYSADM sets which LOV tables can be modified by non-SYSADM users with the SETTINGS | SYSADM OPTIONS | LOV CONTROL OPTIONS command.
- When you want to create a link, you must use F2 or have the drop-down list enabled for that entry (the down arrow ( ) appears). Often, you can tell that an item creates a link because of the ID number that is filled Some of the links that you can create are:
  - Person to their company
  - Company to a job order
  - Person (contact or hiring manager) to a job order
  - Company and job order to a search
  - Person, company, and/or job order to an activity
  - Person, company or job order to a search (as its owner)

ABC’s of Sending Email Within WinSearch

WinSearch can handle the process of preparing an email. This is handy because:

- Recipients email addresses are already in WinSearch
- Documents that you want to send are already in WinSearch
- WinSearch can automatically record the emails that you send from within WinSearch

To send an email from within WinSearch:

1. Find one of the parties whom you want to use in the email. This can be the recipient or a person or company whose documents you want included in the email.
2. Select the Settings | Send Email command, press F11, or click the Send Email toolbar button ().

   WinSearch now wants to know if the person you were at in step 1 is the email’s recipient or a person whose documents will be included in the email.

3. Select Send Email To if the person selected in step 1 will be the email recipient or Email Documents if the person selected in step 1 has documents that you want to include in the email.

4. Add any missing email recipients. The To box may contain a drop-down list for everyone in the database. If the drop-down list is available, you can select the person by typing or using the mouse. Usually, type the last name (or some part thereof) and press F2. WinSearch opens a List of Values table containing people whose last name matches what you type. Find the person you want then double-click their row header (the gray box at the front of the row) or use the Select command. Then select Yes to close the LOV window (or select No and select the next recipient).

5. Change any recipients from To to another style of receipt such as BCC and CC.

6. If you want the email to include documents, select the Attachments button. Otherwise, skip to step 10.

7. Select whose documents are included in the email. WinSearch already includes the person whom you were at in step 1. Select the Persons or Company option button to select whether you want to add a person or company to the list of who provides documents. Then, type the person’s last name or company name and press F2. WinSearch opens a List of Values table containing people whose last name match what you type. Select the person or company in the same manner that you selected email recipients in step 4. Do this for each person or company whose documents you want in the email.

8. For each person or company whose documents you want to include, highlight their name in the top box so the middle box lists their documents. Highlight and double-click the document that you want to add so it shows up in the third list box. Only the documents included in the third list box are sent. You can also use the Additional Files button to include files in this email that are not part of the database as well as adding standard documents set up in this database.

9. Select OK when you have finished adding attachments.

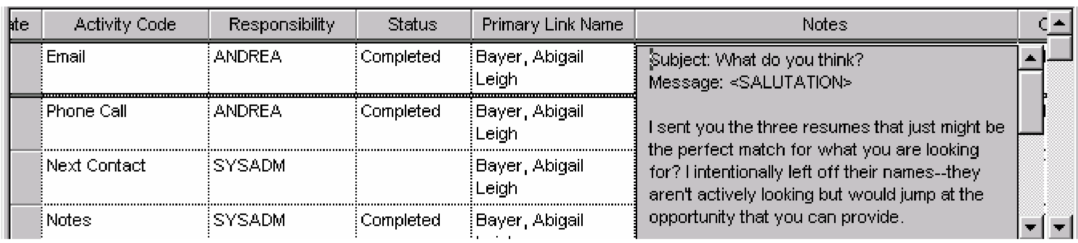
10. Type the subject and message for the email, just like in any other email program.

11. Select the Send Email button.

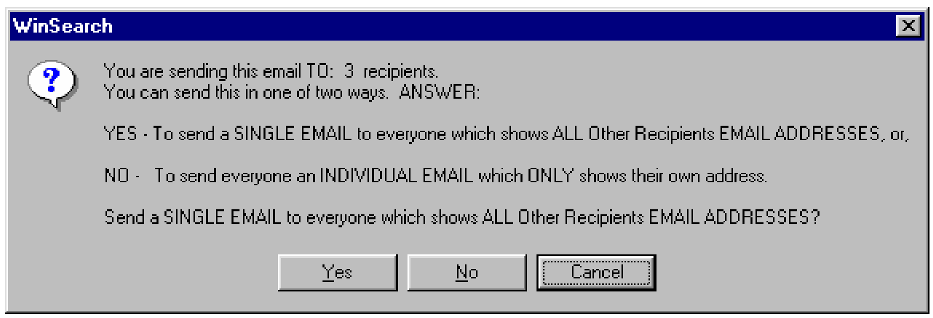
Notes

- Sending faxes behaves just like sending email except you have phone numbers instead of email addresses.
- If the Send Email dialog box includes a Resume Submittal check box, WinSearch lets you identify this email as a resume submittal instead of a standard email. This means that the email will be logged as a resume submittal event rather than as an email. SYSADM sets this up using the Settings | SYSADM Options | Automatic Logging command and turning on and selecting an activity code for the Resume Submittal event.

- The document descriptions that you see for a person's or company's documents are the descriptions given to the documents when they are imported. Both imported documents and WSResume ones can have descriptions.
- Emails can have a standard chunk of text at the end of the email that usually identifies you and your company. This is called a *signature file*. You can have emails sent from within WinSearch include a signature file. To set up a signature file for WinSearch, create a text file with the text to use then select that text file in the Signature File check box in the dialog box displayed by the SETTINGS | USER OPTIONS | GENERAL SETTINGS command.
- WinSearch does not actually send the email. The advantage of this is that users can continue to use their current email program. WinSearch merely gathers the necessary information needed for the email, creating an activity if necessary and hands the whole package to email to your default email package.
- The SYSADM user can set up WinSearch so that all emails created within WinSearch are automatically tracked as activities. To start this, the SYSADM user creates an activity such as Email. Then SYSADM selects the SETTINGS | SYSADM OPTIONS | AUTOMATIC ACTIVITY LOGGING command, highlights Email Sent From WinSearch, select the TURN ON AUTOMATIC LOGGING FOR THIS EVENT check box and select the activity code in the corresponding drop-down list box. Once SYSADM does this, every email that users sent from within WinSearch is recorded as an activity. An example of what this activity might look like is shown here:



- If the list of email recipients includes more than one To recipient, WinSearch gives you an extra prompt when you click SEND EMAIL. If you select YES to the prompt, each recipient knows about each other. If you select NO, each recipient receives their own email so that they do not know about each other. You can personalize them using the Include Salutation check box, which adds "Dear" and their name to the beginning of the entry.



- A quick method of picking documents is to select the ATTACH PRIMARY DOCS button. For each non-contact person listed as a source of documents, WinSearch looks at their Documents Detail Table. If they have only one document, WinSearch adds that. If they have multiple documents, WinSearch attaches the one with the Primary check box selected. If none is marked as primary, WinSearch does nothing.
- When you are in the Select Email Attachments dialog box, you can review the documents you are about to email. Highlight the document in the second or third list box then select the EDIT/REVIEW DOCUMENT/FILE button. Word, or the appropriate application, opens with the document. However, close the document before you send the email. Some programs will not let a document be emailed while that document is open.
- If you get a message that your email address is missing, you are seeing this message because WinSearch cannot send you a copy of the email. However, for most email systems, you already have a copy in your Sent folder. Therefore, turn off this harmless message by selecting the SETTINGS | USER OPTIONS | GENERAL SETTINGS command and clearing the Warn For Missing Email Address check box.
- Your email message can be checked for misspellings once you choose SEND EMAIL when the Auto Spellcheck Email check box is selected. You can also check the spelling by right-clicking the message and choosing SPELL CHECK.
- If you want an email linked to a job order, you must start the email from a location that includes the job order. This includes any of these locations:
  - Search where the search's owner is a job order.
  - Job order form or table window.
  - Job Order Detail table that might be opened from a company or hiring authority.
  - Search where the results of the search are job orders.

- Outgoing emails sent from Outlook rather than WinSearch may or may not be recorded. They will only be recorded if: WinSearch is running, automatic activities for the Email Sent From Outlook event is turned on, and you are using Outlook 2003 or later.

ABC's of Using The Daily Planner

WinSearch's Daily Planner window shows any group of activities based on criteria that you select. The Daily Planner is designed to be your primary window where you can see many of the entries you need. Figure A shows a Daily Planner window with several entries on it. The left side of this window contains the Filter/Detail Pane. This is where you see detail on the highlighted activity as well as where you choose which activities that you want to see.

To show the Daily Planner, do one of the following:

- Click the Daily Planner toolbar button () from WinSearch's main window.
- Select the CALENDAR | DAILY PLANNER command from WinSearch's main menu.
- Set WinSearch to open the Daily Planner when you start the main WinSearch program using the SETTINGS | USER OPTIONS | CALENDAR SETTINGS command.

To change which activities appear in the Daily Planner, use one of these steps:

- Use QBE to choose the activities using the QBE features.
- Select the QUERY | MEMORIZED QUERY command and one of the listed memorized queries.
- Use the QUERY | ADVANCED SQL QUERY command to choose the activities using advanced query features.
- Make selections from the Filter/Detail Pane.

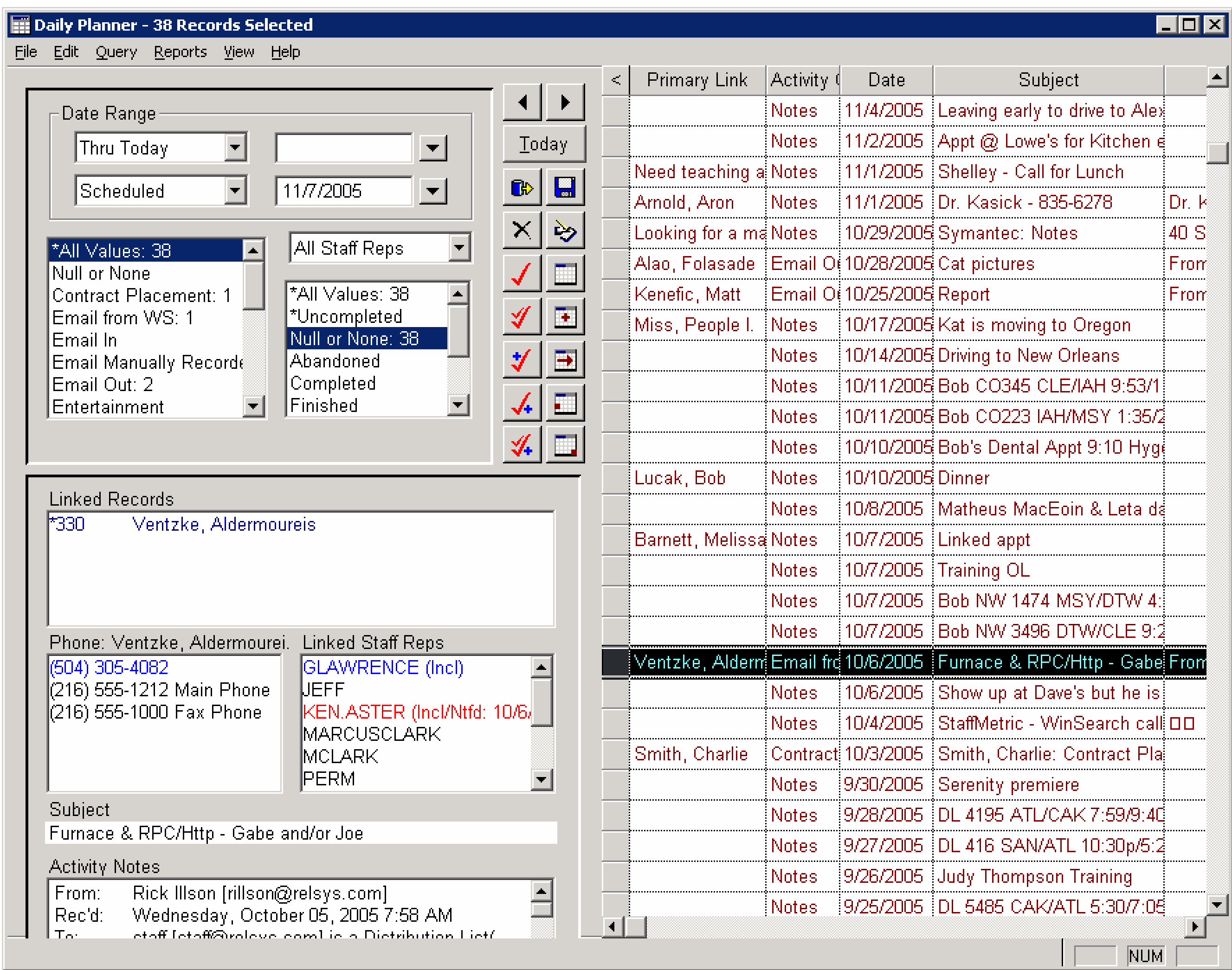


Figure A: Daily Planner window

The Filter/Detail Pane, the left hand panel in the Daily Planner window, shown in Figure A, is where you make most of your selections. From this section of the window, you can select a date range, as well as which activity codes, staff rep(s) and activity status entries to use to select activities. For the date range, you can enter a specific start and end date or you can choose one of the available options in the first drop-down list box. You can also choose whether the date selection uses the activity's create, update, due, completed, or (most often used) scheduled date. As a quick choice, you can click the Today button to quickly set the selected date range to today's date. Right-clicking the list of activity or status codes provides a popup menu to clear your choices or to pick the "All" choice from the list.

From Daily Planner, here are a few things that you can do:

- Change entries in the activity directly in the Daily Planner; either by changing the entry in the Filter/Detail Pane or in the table portion. You can also modify the activity's notes by clicking the Edit Notes button ().

- Bring up the Activity Record window for that activity. Double-click the row header (gray box at the front of the row), right-click and choose Edit Activity, or click the Edit Activity button (). Some entries for an activity can only be changed in the Activity Record window.

- Mark activities complete. Change the status, click the Mark Completed button () or the Mark Completed & Follow Up button (), or right-click the activity's row and choosing Mark Completed or Mark Completed & Follow Up menu commands.

- Create follow up activities. Click the Create Follow Up button () or right-click the row and choose Create Follow Up Activity from the popup menu. Any buttons or commands that create follow up activities are best done one activity at a time.

- Reschedule an activity. The Daily Planner has several buttons that can accomplish this. You can click the Select Date button () and pick a date to change the scheduled date to the one you choose. The Add Attempt/Select Date toolbar button () is similar since you see the calendar popup where you can pick a date to change the scheduled date and at the same time, increase the value of Attempts by 1. Some of the more preset options include Reschedule for Tomorrow (), Reschedule Ahead One Week (), and Reschedule Ahead One Month () buttons which advance the scheduled date of the activity to the chosen amount. You can also right-click the row(s) and choose one of the options for rescheduling in the popup menu.

- Go to any of the linked items in the activities. Double-clicking them in the Linked Records section of the Filter/Detail Pane is the easiest way to do this, but you can also select the link in the table portion and open the main form window from there.

Notes

- The Daily Planner can refresh automatically or only when you tell it to do so. This feature is turned on and off with the Query | Auto Select on Any Criteria Change command. When this command does not have a check mark, WinSearch will not update which activities appear as you change the criteria. When you want to apply the new criteria, click the Select Records toolbar button () or select the Query | Select Activities for Current Criteria command.
- Once the Daily Planner contains the criteria selection that you usually want, select the Query | Save Current Criteria as Defaults command. This command sets the criteria for the Daily Planner every time that it is opened. Saving the criteria saves the date range, activity code and status choices.
- The Daily Planner has several settings that affect performance and behavior. These commands appear in the Query menu in the Daily Planner, right-click's popup menu in the Daily Planner, and the Settings | User Options | Calendar Settings command.

ABC's of Using WSOutlook

For these features to work, you must be connected to your WinSearch database. You can tell this by the WinSearch icon that appears in your system tray in the lower right corner of the taskbar.

To use WSOutlook select an email and click one of these buttons:

 Create a new person's record from the selected email attachments.

 Create new person's records from all emails (that have attachments) in a selected folder.

 Create new person's records from selected text in the email message.

 Import attachments for an existing WinSearch record.

 Import the selected WinSearch people to make Outlook contact records.

 Export highlighted Outlook contacts to create WinSearch persons records.

 Synchronize changes between people & contacts as well as update Outlook and WinSearch calendars.

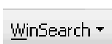
 Lookup a person by the sender's email address or the Outlook contact link or email address.

 Lookup all persons from a sender's email address's domain (the part after the "@" character).

 Create a WinSearch activity out of the highlighted Outlook email or contact.

 Access and configure WSOutlook's advanced processing options.

 Display the About Box and database connection information



Use this drop-down to see these same commands from the keyboard.

To track emails received in Outlook:

- No action is needed for day-to-day usage. WSOutlook does this automatically once it is set up. Any incoming emails that WinSearch correctly identifies the sender are recorded as an activity linked to the person(s). Emails that WinSearch cannot identify can be manually recorded as activities. SYSADM sets this up by assigning an activity code to the Email Sent From Outlook event with the SETTINGS | SYSADM OPTIONS | AUTOMATIC ACTIVITY LOGGING command.

To process an attachment attached to an email:

1. Click the email with the attachment in Outlook.
2. Click the Add Attachments To Existing DB Record toolbar button ().
3. Enter the person's or company's name and select LOOKUP.
4. Click the appropriate person or company.
5. Modify the Document Description entry if needed. The final document description can also parenthetically include the document's filename.
6. Choose whether to add the document to WSResume and process it for key words.
7. Choose whether the document becomes the primary document.
8. Choose ADD DOCUMENT. If the current email represents a new person, click CREATE NEW PERSON instead to add a new person with the current document(s).
9. Respond to any prompts for processing the resume.

To process selected text in an email:

1. Highlight the text containing the resume making sure that the candidate's name is in the first line of the selection.

2. Click the Process Selected Text toolbar button ().

3. Respond to any prompts for processing the resume.

Options such as flags or moving/deleting the email track which emails are processed.

To process a resume stored as an attachment to an email:

1. Highlight the email with the attachment.

2. Click the Process Resume () or Add to DB Record () button.

3. Respond to any prompts for processing the resume.

To process an entire folder of resumes:

1. Select the folder or an item in the folder.

2. Click the Process All Email(s) in Selected Folders toolbar button ().

3. Select OK to the prompt for the initial values assigned to the new people.

4. Select Yes to process subfolders or No to skip folders from the prompt for whether to process subfolders, if necessary.

Find a person in WinSearch using their Email or contact record in Outlook:

1. Click on the email.

2. Click Lookup by Sender's Email Address toolbar button ().

To transfer a WinSearch person into Outlook:

1. Click the Import Contacts From Database toolbar button ().

2. Highlight the person(s) by entering their name and choosing Lookup, limiting the list according to staff rep, category or status or picking a saved list.

3. Select OK to add the new Outlook contacts.

Notes

- These features are designed to work with Outlook 2002 (XP). None of them work with Outlook 2000 and below.
- Nothing needs to be done other than clicking the Synchronize With WinSearch toolbar button () to transfer your Outlook calendar to WinSearch and vice versa. SYSADM can put restrictions on whether this transfer can occur.