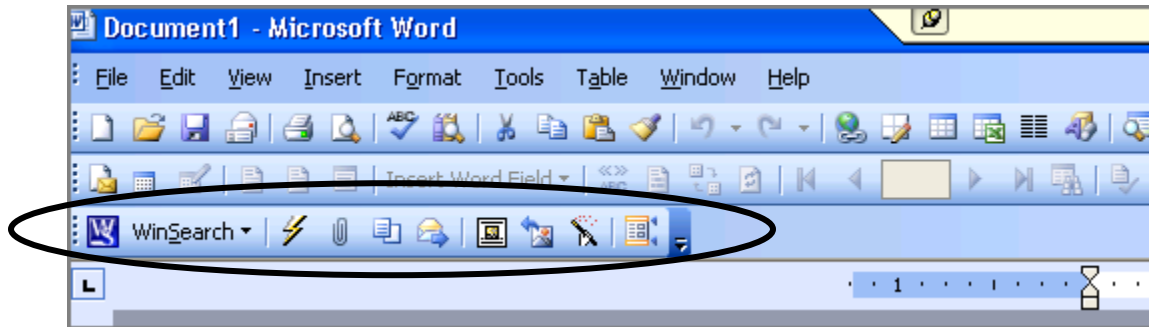# MS Word – WinSearch Toolbar Basics

Overview

This document outlines the various icons present on the WinSearch toolbar in Microsoft Word.

Please Note: If you open up Microsoft Word and the toolbar is not available go to **View | Toolbars** and make sure that WinSearch is selected.

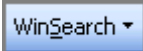When the toolbar is selected it will appear below the standard toolbars, as seen below:

The WinSearch toolbar in Word allows you to perform the following tasks:

- Process resumes
- Attach documents to existing records
- Create a duplicate of a document for editing purposes
- Update addresses on existing records
- Paste a logo on a resume

The first two icons provide basic information about your WinSearch installation and the icons on the toolbar.

- The **About WinSearch** icon is the first icon on the toolbar and it displays basic information about WinSearch and the Word Add-in. No functionality is tied to this icon, it simply provides the following details:
    - Who the product is licensed to
    - SQL Server Connection Information
    - Database Name and User Name
    - File locations for WinSearch and the Imported Documents Directory

- You can also use the **About WinSearch** icon to change your login to the WinSearch database by clicking on the **Change Login** button at the bottom of that screen.

- The second icon WinSearch ▾ is a menu that indicates what each icon is for.
    - o You may click on the options on this menu or simply select the icons themselves to perform each action.
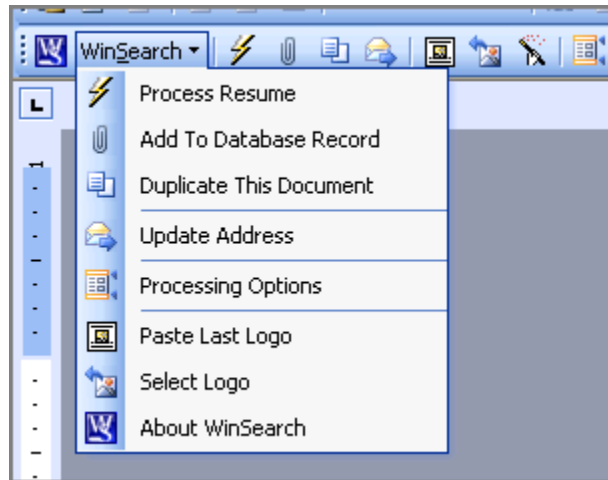

Processing Resumes & Attaching Documents

Word documents can easily be processed into a new WinSearch Persons record or attached to existing Persons or Company records.

- The ⚡ icon processes a resume to create a **new** Persons record.
- The 📎 icon attaches the current document to an **existing** Persons record.

Processing a Resume

1. Open a Word document resume; Word should be displaying the WinSearch toolbar as shown above.
2. Click the **Process Resume** icon ⚡.
3. You may receive the following prompt about the document being "**Read-Only**". Click **Yes** if you see this prompt.
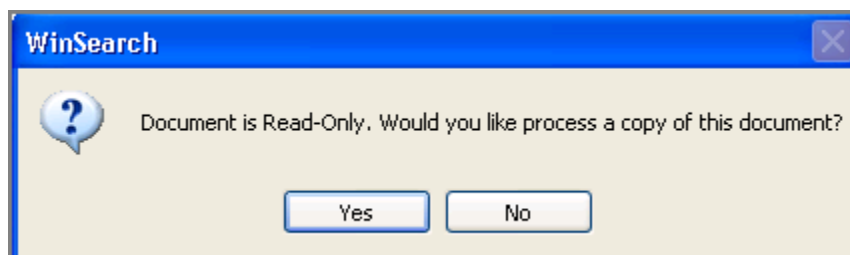
4. If the option is selected to receive a prompt when processing, you will see the following prompt verifying information: (**Please Note:** By default the prompt does not appear. This setting will be covered under the *Processing Options* section.)

5. When the record is successfully created the new Persons form will display automatically by default. (**Please Note:** this setting can also be changed and will be discussed under the section entitled *Processing Options*.)

Dealing with Duplicates

If WinSearch suspects that a duplicate record is trying to be created you will see the following prompt:
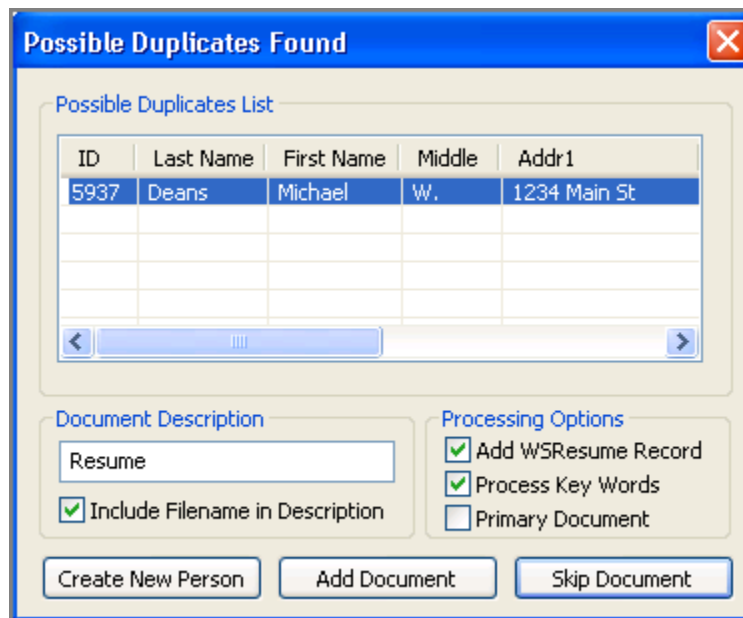
Duplicate checking is based on First & Last Name. From this screen you can choose to **Create New Person, Add Document** to the existing record, or **Skip Document** all together.

Adding an Attachment

1. Open the Word document you wish to attach; Word should be displaying the WinSearch toolbar.
2. Click on the **Add to Database Record** icon - [icon].
3. Click **Yes** if you see the "**Read-Only**" prompt.
4. The **Lookup Records in DB** box will appear; first you must select if you would like to add the document to a Person record or Company Record. Select the appropriate button, as seen below:

5. Type the person's name or the company name that you wish to attach to. For **Persons** start with **Last Name, First Name.**
6. Click Lookup- a list of records that match will appear in the table below.
7. Click on the record to which you want to attach the document.
8. Under **Document Description** type the name of the document- this appears under **File Description** on the Documents Table. If you want the existing filename to be included, check off the box directly below the description.
9. **If you are attaching a resume** you will most likely want to have the boxes under **Processing Options** selected.
10. Click on **Add Document** to add the attachment.

There are also options to **Create New Person** or **Skip Document.**

- If you determine that the person does not currently exist in the database you may click **Create New Person** and the document will be processed as a resume to create a new record.
- If you decide not to attach the document after all you may click **Skip Document** to cancel out the screen.
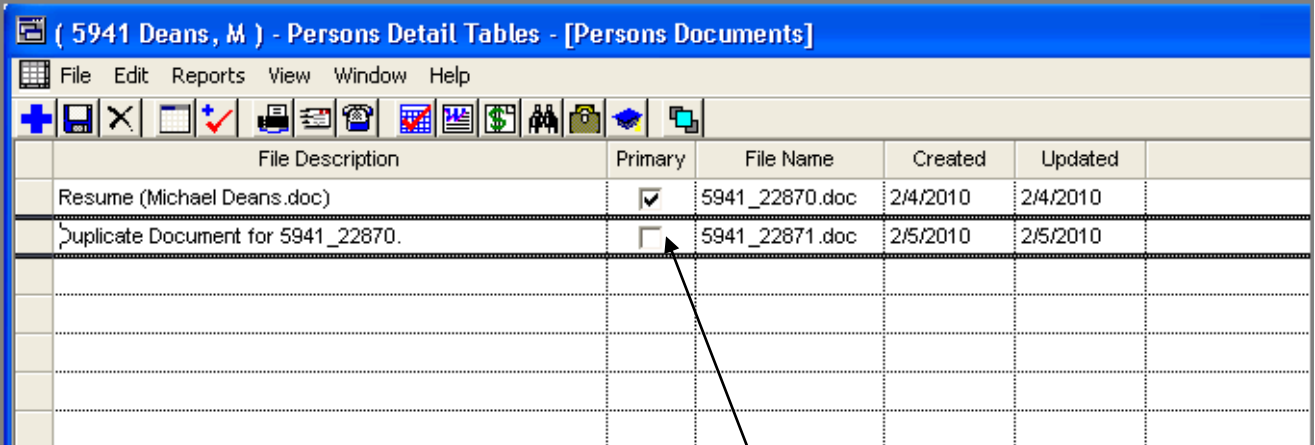
Duplicating the Document

The WinSearch toolbar has a **Duplicate Document** icon that allows you to create an exact duplicate of the original document for editing purposes; allowing you to maintain the original document as is.

Creating a Duplicate

1. Open the document that you wish to duplicate. This is typically done from the Person or Company record that has the document attached to it.

2. On the WinSearch toolbar in Word, click on **Duplicate Document** icon.

3. The screen will briefly flash; a duplicate has been created. You are now free to make whatever changes you would like. (**Please Note**: Adding logos will be discussed in the following *Logos* section.)

4. Click Save when you are finished. (If you fail to save the document, you will be prompted when you close Word.)

Changing the File Name for a Duplicate Document

1. Open the WinSearch Persons record that corresponds to the document that you just duplicated.

2. Open the **Documents** table by click on the **Documents** icon or by going to the **View | Documents** menu. (If the **Documents** table is already open you will need to close it and reopen to see the **Duplicate Document.**)

3. Put your cursor in the **File Description** field. You are now able to delete "Duplicate Document for XXX.XXX" and add your own description, as seen below:

File Description	Primary	File Name	Created	Updated
Resume (Michael Deans.doc)	☑	5941_22870.doc	2/4/2010	2/4/2010
Duplicate Document for 5941_22870.	☐	5941_22871.doc	2/5/2010	2/5/2010

(5941 Deans, M) - Persons Detail Tables - [Persons Documents]
File Edit Reports View Window Help

4. When finished, you may choose to mark the new document **Primary** by clicking the check box.

5. Then his **Save**.

Updating Addresses

When you receive an updated resume with new address information for a candidate record that already exists in your

WinSearch database, the **Update Address** icon automates the process of updating that address.

Updating an Address

1. Begin by adding the updated resume to the WinSearch Persons record. (For assistance with this- follow the steps under **Adding an Attachment** in the *Processing Resumes & Adding Attachments* section.)
2. Once it has been added to the WinSearch record, open the document in Word, if it's not open already.
3. Click on the **Update Address** icon.
4. You will see the following prompt displaying how the new address information breaks down:
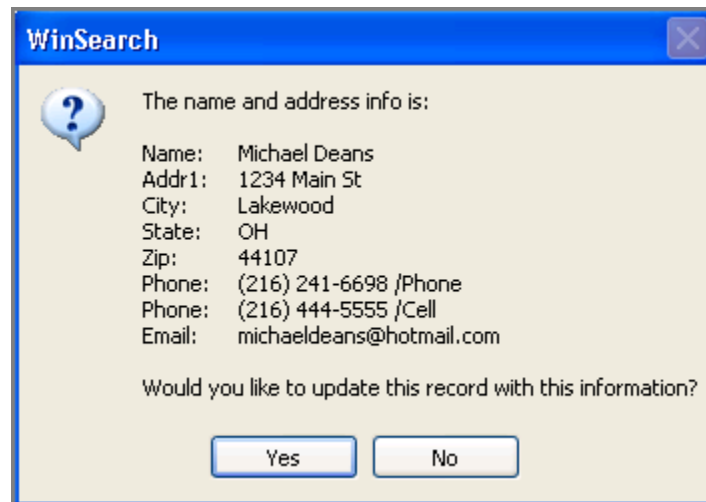
5. Click **Yes** to have the address information updated.
6. The following prompt appears to confirm the update, click **OK** to close the prompt.
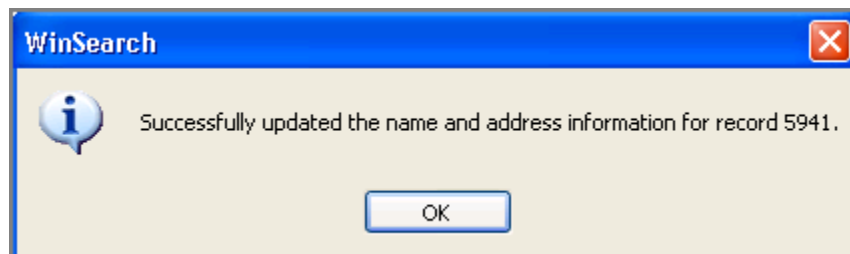
Logos

There are three icons on the WinSearch toolbar in Word that deal with Logos.

- The **Paste Logo** icon [icon] simply pastes a frequently used icon on the document in the same position every time. Click this logo if you only have one logo set up and it will instantly insert your logo.

- The **Select Logo** icon [icon] allows you to select an icon from a list of icons that have previously been setup. Options for positioning the logo on the page are also available.

- The **Run Logo Setup Wizard** icon [icon] takes you step by step through the process of setting up a new logo.

Setting up your Logos

1. Find or create a graphic file containing the image to use for the logo. You can use Windows' paint program or any other graphics program that creates images that you can open in Word. Often, JPG images work best but you may need to experiment to find the best result.
2. Start Word for Windows.
3. Click the **Run Logo Setup Wizard** toolbar button [icon] in Word.
4. Click the **NEXT** button after the introduction window.
5. Choose **Add a New Logo** and choose **NEXT**. There are also options to **Edit and existing logo** and **Delete an existing logo**, as seen below:


6. Type a description for the logo and choose **NEXT**.
7. Find the external file to use for the logo. You may need to click the **BROWSE** button to find the file. Once the file name is specified, select **NEXT**.
8. Choose the initial location to place this logo and whether you see the prompt for positioning the logo when you add it to a document.

9. Choose **NEXT**.
10. Select whether the logo is available to others, whether it goes on the first page, and how much the logo needs to be resized.
11. Select **FINISH**.

Once the logo is added, you are ready to use it with the **Select Logo** and **Paste Logo** toolbar buttons. These logos are set up in the database and can be shared with other users.

Selecting a Logo

1. Click on the **Select Logo** icon [icon]. The following screen will appear displaying your logos along with any shared logos:
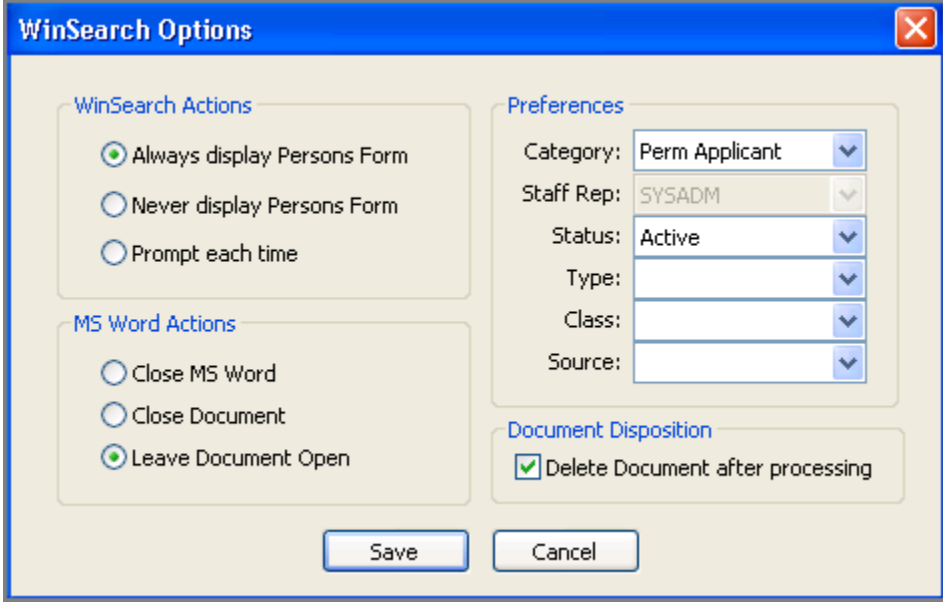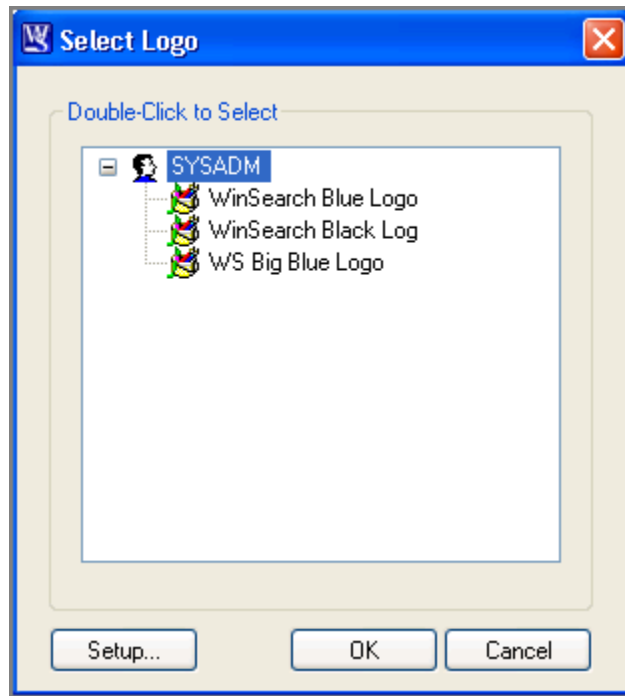

2. Click on the logo that you would like to use and click **OK.**
3. If during the logo setup wizard you chose to see a prompt for where to position the logo you will make that selection on the following screen, then hit **OK** to insert the logo**:**

Processing Options

The **Processing Options** icon is where the basic settings for the WinSearch toolbar in Word are determined. Click on the **Processing Options** icon to pull up the following screen:

The following is a breakdown of the different settings:

WinSearch Actions

- **Always display Persons Form –** If you would like the Persons Form to appear after processing a resume, select this option.
- **Never display Persons Form –** if you would *not* like the Persons Form to appear after processing, select this option.
- **Prompt Each Time –** to be prompted with the contact information for the new record, prior to creating it, select this option.

MS Word Actions

- **Close MS Word –** Completely closes Word after processing a document.
- **Close Document –** Leaves Word open but closes the document that was processed.
- **Leave Document Open –** Leaves the document open after processing. A popular choice if you intend to make any changes to the document, such as adding a logo.

Preferences

Set preferences for the new Persons records that are created as a result of processing a resume. Preferences may be set for **Category, Status, Type, Class, Source** and, in some cases, **Staff Rep.**

Document Disposition

Check this off if you would like the original document to be deleted once it has been successfully processed into WinSearch.