# Working with Search Results

Overview

There are many features available from a WinSearch search list, including the following:

- Naming searches for easy access in the future
- Linking your search to another WinSearch record
- Sorting your search results
- Setting your Column Settings
- WinSearch PowerClick™ Navigation for reviewing resumes
- Adding & Removing Records
- Adding records to Saved Lists
- Creating activities for a group of records
- Sending bulk emails from your search list

Saving & Accessing your Searches

Searches are saved automatically in WinSearch as soon as they are executed. Saved searches can be identified one of two ways:

- Looking them up by Description
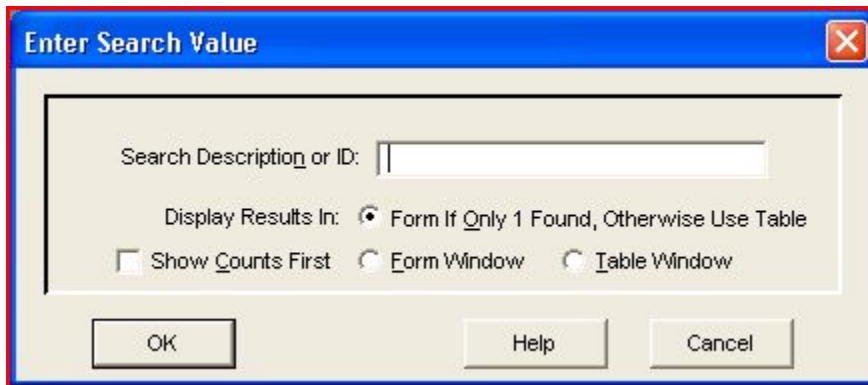- Accessing them through the Search Owner
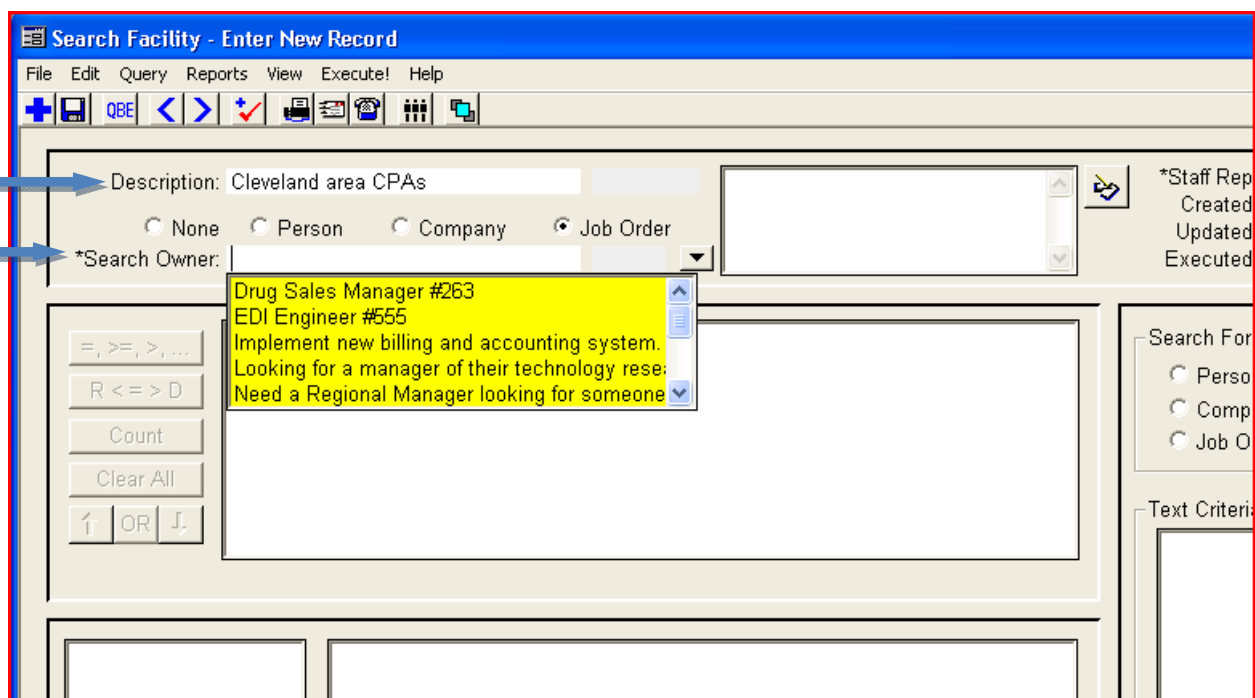
Search Description

Prior to hitting Execute on your Search, type something in the Description field, found in the upper left-hand corner of the Search facility. You will be able to use this description to look the search up at any point in the future.

Looking up a Search using Search Description

1. Click on the Lookup Searches Icon 🔍. (You may also access this by going to **Search | Lookup by Description or ID** or by hitting **F8** on your keyboard.)
2. The following box will appear:

3. Type in the Search Description or the record ID number.

4. To access the Search List *as you left it* click on the Search List icon 🗔 or go to **View | Search List** menu. This will show you a list of results as of the last time you executed the search.
5. If you prefer, hit **Execute** again and it will bring up an up-to-date list. (**Please Note**: if you made any changes to your Search List previously, including deleting or adding records, those changes are lost if you opt to **Execute** your search at this point.)
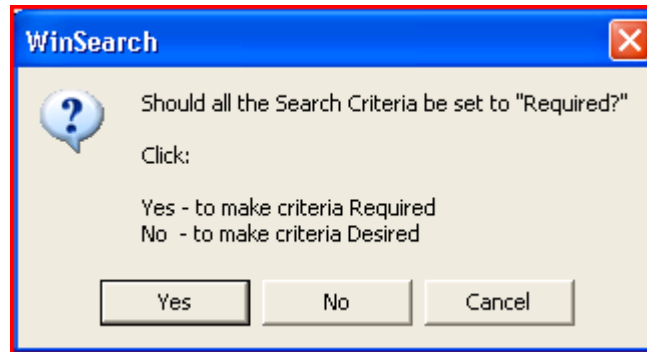

Search Owner

A Search Owner can be assigned to a Search, linking that Search to a Person, Company or Job Order record. This accomplishes two things:

- Key Words associated with the Search Owner record can be pulled in as search criteria automatically.
- The Search can be accessed from the Search Owner record.

Designating a Search Owner

1. Choose the type of record that will serve as Search Owner by selecting the button for **Person**, **Company** or **Job Order**- found above the Search Owner field.

2. Put your cursor in the Search Owner text box; a drop down is available or you may type ahead to find the record you wish to link to. (Hint: for a Person's record, start with the LAST name.)
3. If there are keywords on the Search Owner record you will receive a prompt asking if you would like to add the Key Words as Required, Desired or not at all. See below:

Please Note: If you do not wish to add the Key Words as search criteria, click Cancel.

Accessing a Search from the Search Owner

1. Look up the Search Owner record as you normally would.
2. A list of searches can be accessed by clicking on the Searches icon on the record or by going to **View | Searches** menu.
3. A list of linked searches will appear. Right click on the one you want and select **Search Facility** to open the search and re-execute. Select **Search List** to simply display the existing search results list. (See below)
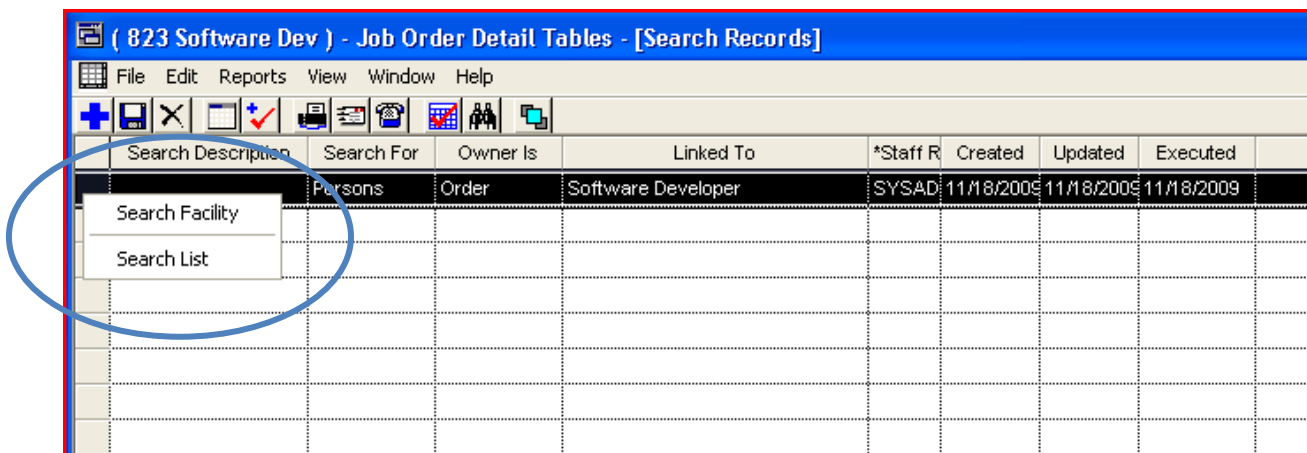
Sorting and Reviewing your Search Results

The Search Results list is initially sorted by **Hits** and then alphabetically by **Name** or **Description**. The results can also be sorted by many of the other columns available, though there are a handful of columns that cannot be sorted.

The columns that you see on your results list depend on your individual **Column Settings**.

WinSearch PowerClick™ Navigation makes it easy to review information quickly without opening superfluous windows.

Changing your Column Settings

Please Note: Column Settings changes only affect the account to which you are logged in.

1. On the Search Results window, go to **View | Column Settings** menu.
2. Using the Arrow buttons `>` to move columns between **Hidden Columns**, **Visible Columns** and **Locked Columns**. (The double arrow `>>` moves all Columns from one box to another.)
3. Use the **Up** and **Down** buttons underneath the list of **Visible** and **Locked** columns to change the order- the closer to the top of the list a column is, the farther to the left it is on the table. (See Below)
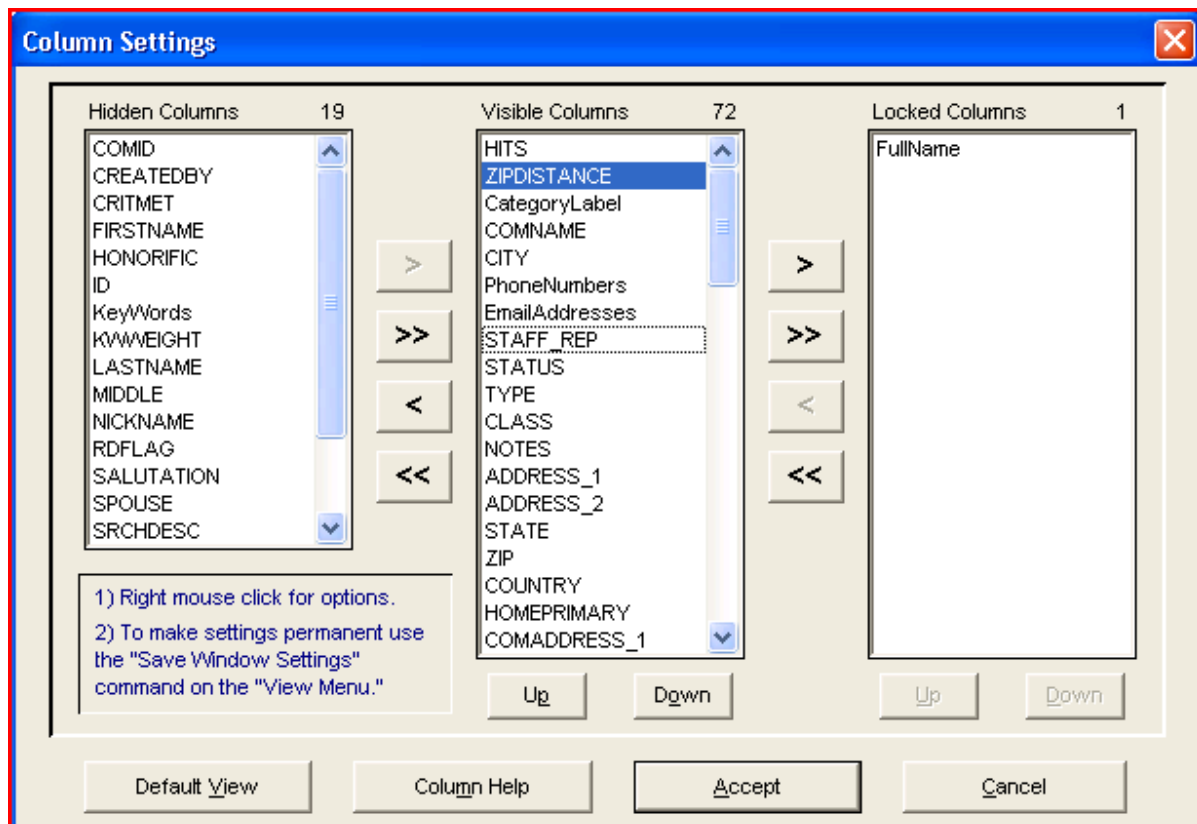
4. Hit **Accept** when all changes have been made.
5. To make the column settings permanent go to **View | Save Window Settings**.

Sorting Tips

- Search results can be sorted by most of the columns on the table.
- Columns representing fields with multiple lines of text or multiple inputs, (i.e. phone numbers), cannot be sorted. Other common examples of columns you cannot sort by:
  - Key Words
  - Email Addresses
  - Phone Numbers
  - User Defined Fields
  - Notes
- To Sort: click on the Column Header once to sort in descending order. A second click will sort in ascending order.

WinSearch PowerClick™ Navigation

To view detail information using PowerClick Navigation:

1. Highlight the record in the search list for which you want to see more information.
2. Right-click the row to display a popup menu listing all the detail tables available for that record. (See below).

3. Select one of the commands from the popup menu to see that information.

4. If you wish to view the information for another record, without opening another window, simply click on the next record in the list and the screen will refresh.

Adding & Removing Records from the Search List

Additional records can be added to a search list whether they currently exist in the database or not. Records can be safely removed from a search list without being deleted entirely from WinSearch.

Adding Records to a Search List

You may need to add records to a search list for one of two reasons:

- You receive referrals to people, companies or job orders that do not currently exist within you WinSearch database.
- A person, company or job order in the database was not included in the initial search results but you want them included in the search list.

Here are the steps for adding a *new* person, company or job order to the search list:

1. Select **File | New Row** command or click the New Record toolbar button . A new record is inserted into the table.
2. Enter the information for the record that you are adding. (Please Note: Adding a person, company or job order to a search list is just like adding it in a persons, company or job order table window. WinSearch Quick Add features may be triggered.)
3. Select **File | Save Changes** command or click the Save Changes toolbar button to save your changes.

Here are steps for adding an *existing* person, company or job order to the search list:

1. Select the **File | Add Database Record to List** command. WinSearch opens a person's, company's or job order's LOV table.
2. Click on the QBE icon or use the **Query | Advanced SQL Query** command or to select the person, company or job order that you want added to the search.
3. Double-click the row header to select or highlight the record and choose the **Select!** menu command. Repeat steps 2-3 until you have added all the records that you wish to add.
4. Close the LOV table listing the people, companies or job orders. All the records that you selected in step 3 will appear on your list. If you are viewing the **RD** column on your search list all added records will have **A** there.

Removing Records from a Search List

1. Highlight the person, company or job order in the search list that you wish to remove.
2. Click on the Mark for Deletion toolbar button or simply press **Delete** on your keyboard.

3. Repeat step 1 & 2 for each record that you want to remove from the list.
4. Select the **File | Delete Marked Rows** command to delete the marked rows.

Please Note: the message that you see when removing items from the search list is a visual reminder that you are only removing them from the search list and not deleting them from the database.

Creating a Saved List from a Search List

Saved Lists are an excellent alternative to Search Lists for storing lists of person or company records. You have complete control over what appears on the list. Saved lists can be created on the fly right from a search results list.

Creating a Saved List

1. Highlight the records that you want to include in the Saved List.

Tip: Click on the row header for the first record in the list and drag your mouse to highlight all rows. Holding down the **Shift** key and clicking the first record and then the last record will also highlight the entire list. You can also hold down the **Crtl** key and click on select records if you do not want the whole list.

2. Right click on any of the highlighted records and select **Add Record(s) to List…** (See Below).
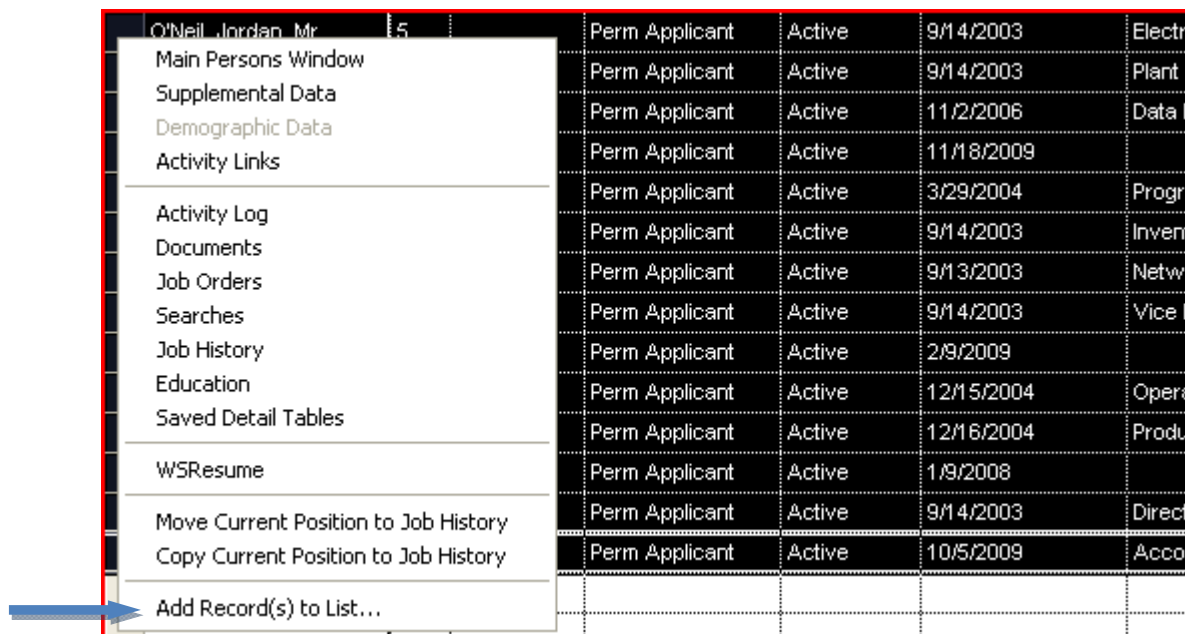

3. The **Add Records To List** screen will now appear showing you a list of our *existing* Saved Lists. If you wish to use an existing list highlight that list and click **Select.**

4. To create a *new* Saved List click the **New** button, as seen below:
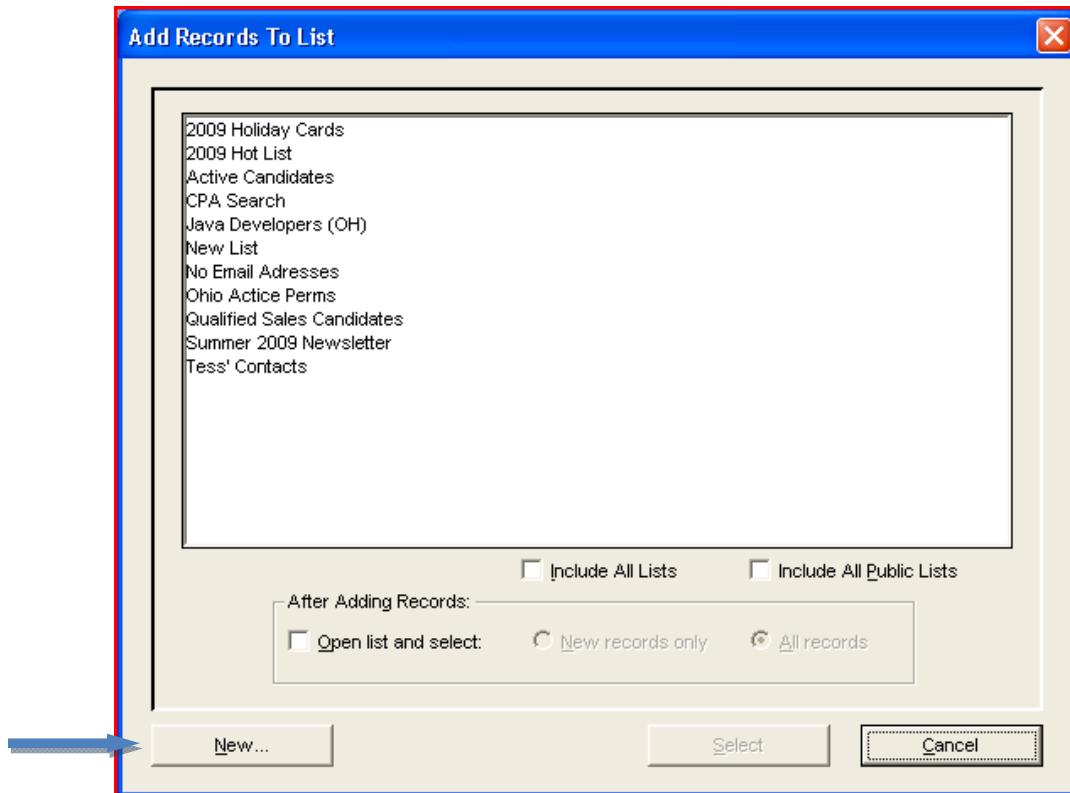
5. On the **Add/Edit List** box enter the name of the Saved List in the **List Name (Required)** field. You may also designate if the list should be private by checking off the **Private List** check box. (When a list is Private, only the staff rep that created it and the SYSADM has access to it.)
6. Choose whether the list contains Persons or Companies by selecting the corresponding button. You may also enter a description within the List Description screen, which is optional.
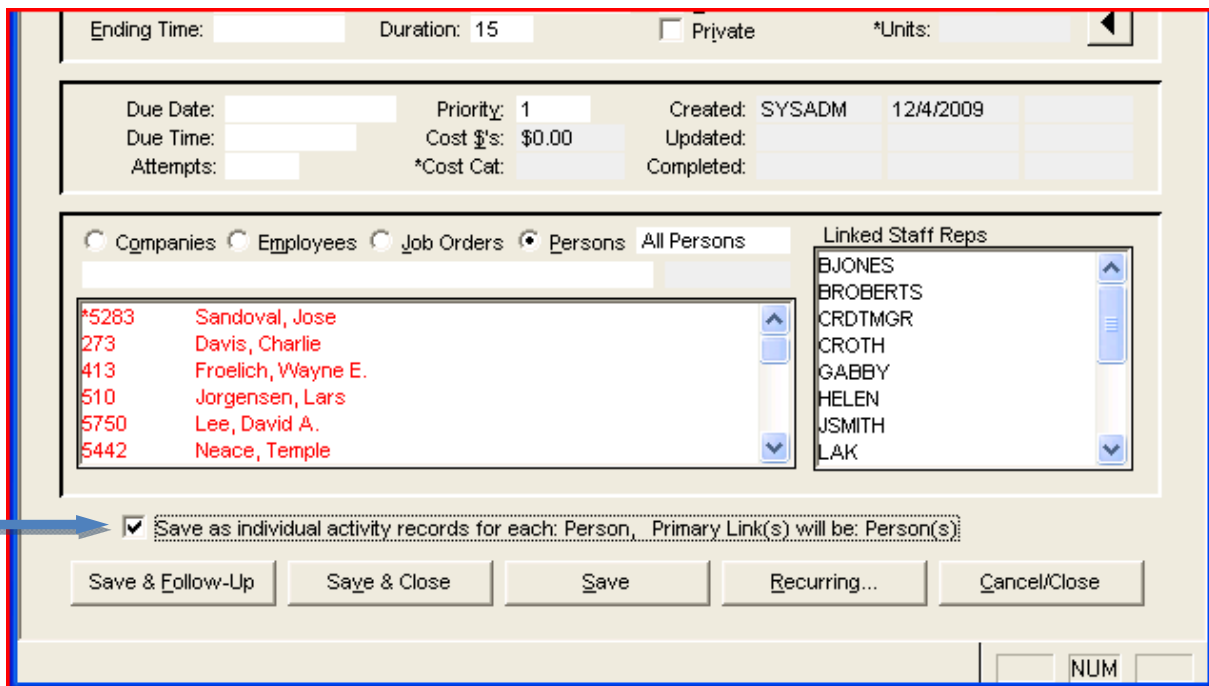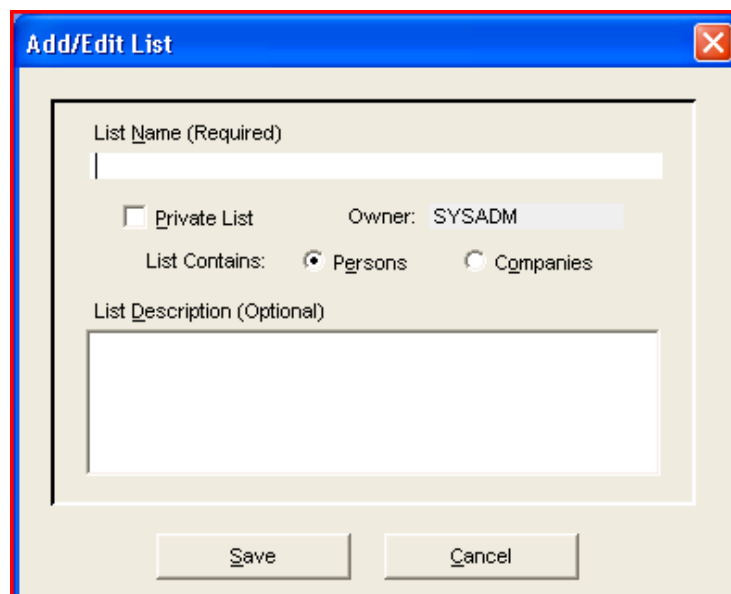
7. When you are finished, click **Save.** You will be brought back to the previous **Add Records To List** window.
8. Highlight, by clicking on it, the list that you just created in steps 4 – 7 and click the **Select** button. Your records have been successfully added to the list.
9. To access your Saved List in the future go to **Lists | Saved Lists** menu in WinSearch.

Creating Activities for Multiple Records

Creating activities for multiple records from your search list is a very simple way of creating call lists and task lists. The steps are essentially the same as creating an activity with the exception of one important check box.

1. Highlight the records that you wish to include on the search list.
2. Click the **Create Activity** icon [icon] to bring up a new activity record.
3. Fill in the type of activity from the **Act. Code** drop down list. (WinSearch will fill in the appropriate **Subject** for each activity- no need to fill this in.)
4. Select the **Scheduled Date** and fill in any other pertinent information for the activity.
5. Below the color-coded activity links section select the check-box for **Save as individual activity records for each: Person, Primary Link(s) will be: Person(s).** (This goes with the persons example, if the activities were for companies or job orders the terminology of that check-box would reflect that.) (See Below).


6. Hit **Save & Close** and an individual activity will be created for each linked record that was selected on the search list.

Sending Bulk Emails from your Search List

Bulk emails can be sent to multiple people from a search list. These emails can be sent individually so that each recipient receives his/her own personalized email.
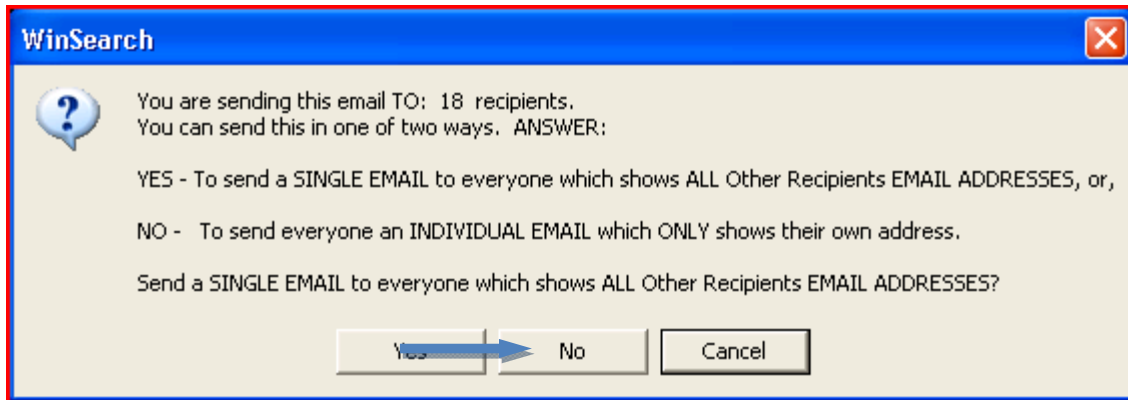
1. Begin by selecting the records that you wish to include in the bulk email.
2. Click on the **Send Email** icon to initiate the email send.
3. A prompt will appear asking if you intend to send an email to the recipients or email their documents, click **Send Email To**. (See below)
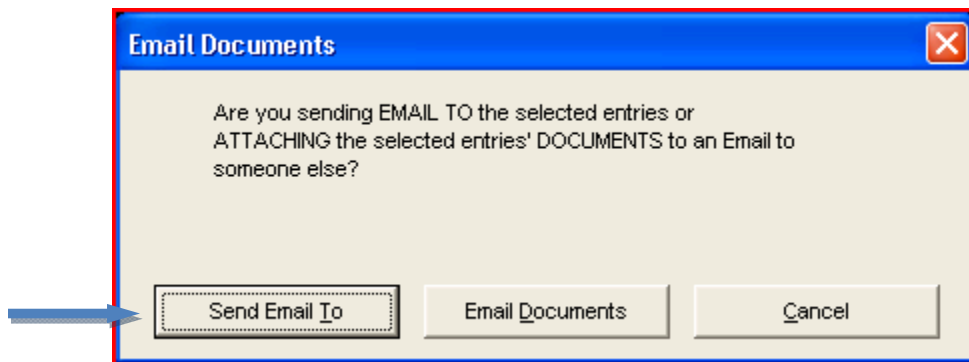
4. Review the list of recipients at the top of the screen. Missing email addresses, denoted <No Email Address>, will not affect your send.
5. Click on the **Attachments** button is you wish to include any attachments.
6. Enter the subject line for the email where it says **Subject:** and in the field below compose your email as you normally would.
    (**Please Note**: if you intend to send the emails individually there is no need to include a salutation prior to the body of your email; WinSearch will automatically include a personalized salutation if you so choose.)
7. There are three check boxes at the bottom of the screen.
    - **Auto Spellcheck Email-** Check this off to have your email automatically checked for spelling errors.
    - **Include Salutation-** With this box checked off, each email you send will be personally addressed using Dear and the individual's first name. **This should be selected if you intend for the emails to go out individually and you would like to include a salutation.** (see below)
    - **Include Signature File**- appends your personal signature file to the end of the email. This needs to be set up in WinSearch; you will receive notification if your signature file has not been set up.
8. If you included any attachments you can click the **Add Attachment List** button to have a brief description of what is attached added at the bottom of the email.
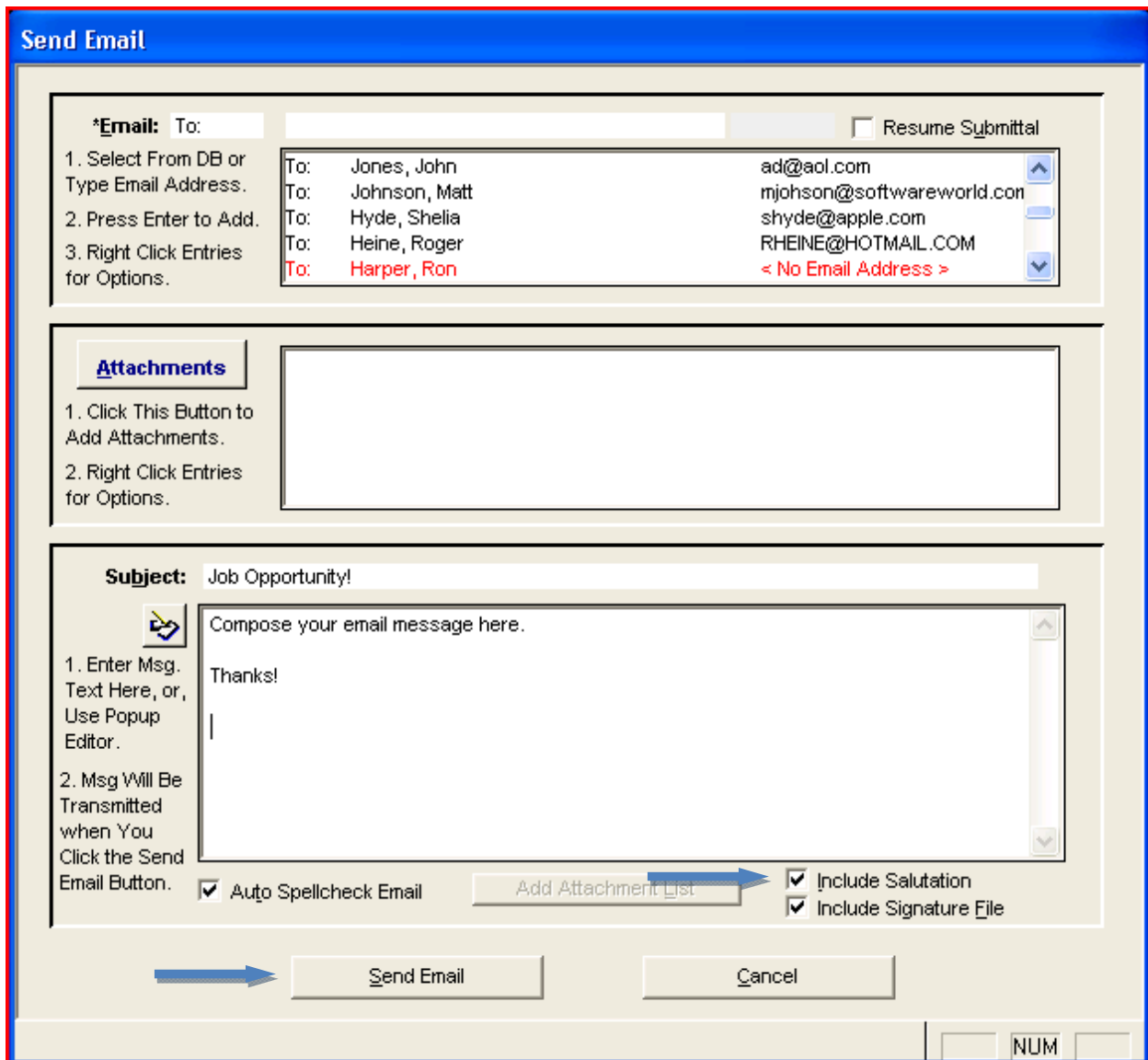
9. When you are finished composing your email click the **Send Email** button.
10. You may see a prompt telling you that certain recipients will not receive the email because they either don't have an email address or have been marked to no receive bulk emails.
11. The next prompt you see is asking if you would like to send out one email to the whole group or send them individually. **Please Note: if you do not want the recipients to see each other's email addresses then click NO.**

WinSearch

? You are sending this email TO: 18 recipients.
You can send this in one of two ways. ANSWER:

YES - To send a SINGLE EMAIL to everyone which shows ALL Other Recipients EMAIL ADDRESSES, or,

NO - To send everyone an INDIVIDUAL EMAIL which ONLY shows their own address.

Send a SINGLE EMAIL to everyone which shows ALL Other Recipients EMAIL ADDRESSES?

[Yes] [No] [Cancel]

12. Individual emails will go out, one for each recipient with an email address. You can view the emails in your **Sent Items** fold in Outlook.