Using PCRecruiter

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Working With Companies

What You'll Find in This Chapter

This chapter describes Companies. It explains how to create and edit them. This chapter also explains how to view names and positions that are associated to Companies. It explains how to view Company activities and how to add new activities. Refer to the following table for a description of the sections you will find in this chapter.

Table 1-1 What You'll Find in Chapter 1

If you want to…	Read…
Add a new company to the database and define additional notes and keywords,	Adding Companies on page 1-2.
View a list of companies with which your organization has close working relationships,	Viewing House Companies on page 1-12.
Change the company name, address, contact numbers, or industry information,	Editing Company Information on page 1-14.
Generate a report that contains name, address, contact numbers, notes, and keywords,	Generating Company Detail Reports on page 1-17.
View what names, positions, and Rollup Lists are associated with a Company,	Viewing Company Associations on page 1-18.
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View a list of interviews that are associated with company positions,	Viewing Interviews on page 1-28.
Remove a company from the database,	Deleting Companies on page 1-29.

Adding Companies

There are two types of companies: Client Companies and the Candidate Company. **Client Companies** are companies with which you have a working relationship. As is discussed in Chapter 2, Working with Names, there are two types of names: Candidates and Non-candidates. **Non-candidates** are executives and managers in Client Companies such as Hiring Managers, Human Resource Personnel, and other executives. Non-candidate names are associated with the company for which they work and are maintained in the **Client** database along with Client Companies and Positions.

The **Candidate Company** is the company to which you add all candidates. **Candidates** are potential employees and contractors that you want to place with Client Companies. Candidate names are always associated with the Candidate Company and are maintained in the **Candidate** database

Companies are added to the database once. Companies are added to the database through the Add New Company frame. From this frame, you can enter the company name, address, contact, and industry information. Refer to the following sections for complete details:

- Adding a Client Company on page 1-2.

- Maintaining Company Notes on page 1-5.

- Entering Company Keywords on page 1-8.

- Entering Additional Company Details on page 1-11.

Adding a Client Company

Companies are added through the Add New Company frame. You should not add duplicate companies. If you add a duplicate company, PCRecruiter will display a warning message.

Procedure 1-1   Adding a Client Company

1. Click the purple **Company** button from the Browser header.

    The Company Menu frame is displayed.

    Note: By default, the Company Menu frame is displayed when you log into PCRecruiter.

2. Click the blue **Add Company** button.

    The Add New Company frame is displayed.
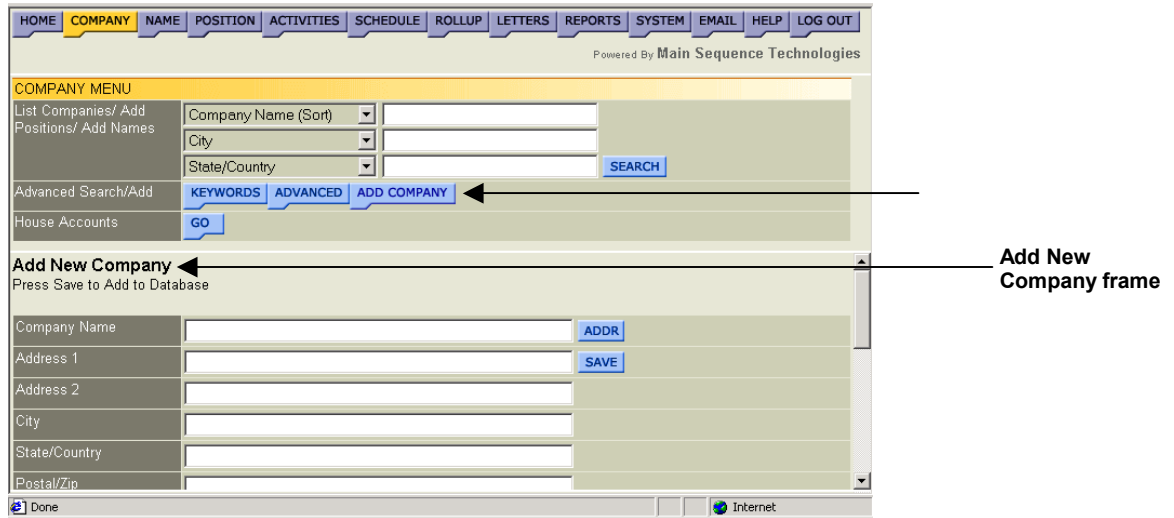
Figure 1-1

3. In the provided fields, type the company's name, street address, city, state, and zip code.

> **Tip:** If the company address information is available in an email or other document from which you can copy text, do the following: copy the text, click the **ADDR** button to display the Company ADDR window, paste the text in the Enter New Company text box and click **Save**. The company name and address information is displayed in the appropriate text boxes in the Add New Company frame.

4. In the provided field, type the company's email address and/or Internet site.

5. In the provided fields, type the company's telephone and fax numbers.

6. In the provided field, enter the company's Industry/Specialty, do the following:

   - Click **List** to display the Dropdown List window. Click **List** to display the Dropdown List window.

Figure 1-2

- Click the specialty that best describes the company.

  You are returned to the Add New Company frame and your selection is displayed in the Industry/Specialty text box.

7. In the provided fields, enter the company symbol or Division of information, the number of employees, and annual revenue.

8. In the Subjective text box, rate the company from 1 to 100 where 100 is a high rating.

   This information is available at a glance when looking at Search Results. Companies with a high subjective rate will have a long green line. Companies with low or no subjective rate will have a short or no green line as illustrated below.
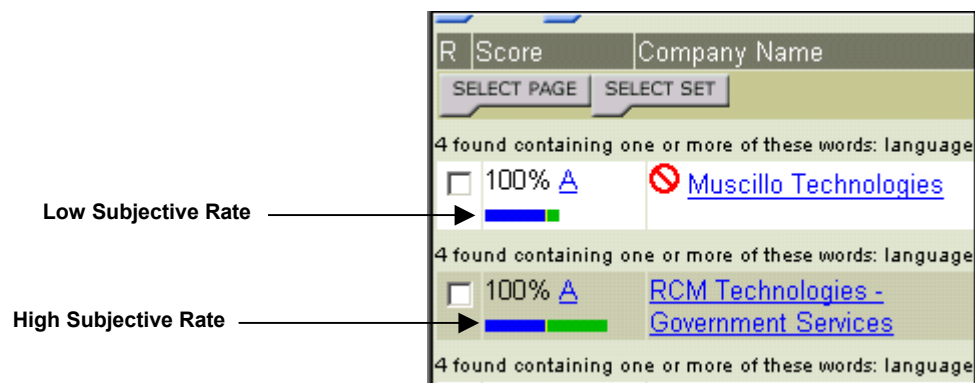
Figure 1-3

9. From the Default Company list box, select one of the following:

- **Client Company.** Select this option to indicate that you have a working relationship with the company.

- **Default Company.** Select this option to indicate that this company should display in the bottom frame by default when you enter the system.

  The default company that you select is specific to your login. All users can specify a Default Company. All companies entered in the database as Default Companies are referred to as House Accounts.

- **Available.** Select this option to indicate that you do not have a working relationship with the company.

10. Click **Save**.

The company record is saved and the Edit Company frame is displayed.

Maintaining Company Notes

You can use Company Notes to capture additional information about a company that is not contained in other frames or documents. The notes that you enter are searchable; meaning, you can use the Keyword Search utility to search for companies based on the notes you enter.

Notes are different than activities. *Notes* are used for information that is not likely to change and that cannot be added on another frame such as unique skills and attributes or past history. *Activities* are used to track events such as telephone calls and messages, candidate presentations, and client visits.

Notes are added through the Add Additional Notes frame and edited through the Change Existing Notes frame. When a note is first entered, the date, time, and author are recorded. When a note is changed, the original date, time and author remain the same.

Refer to the following sections for complete details:

- Entering Company Notes on page 1-6.

- Changing Existing Notes on page 1-7.

Entering Company Notes

Company notes are added through the Add Additional Notes frame. When notes are added, the date, time, and author are recorded.

Procedure 1-2   Entering Company Notes

1. Retrieve the company record for which you want to enter notes. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.
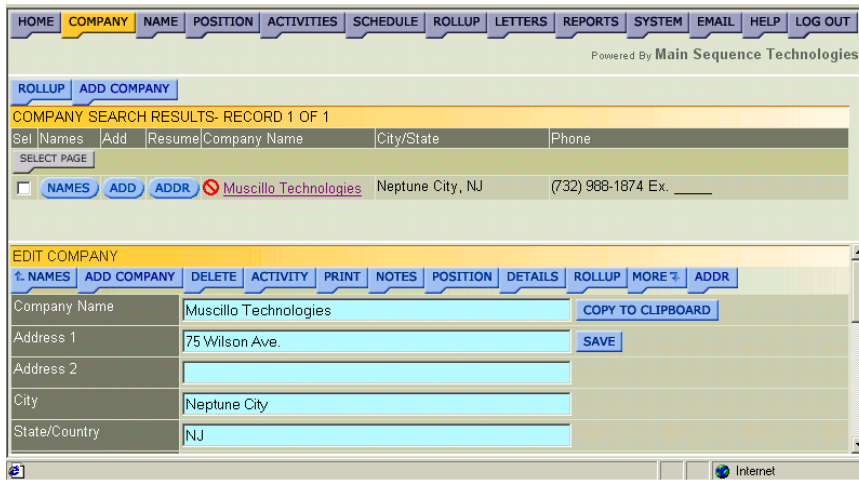
Figure 1-4

3. Click the blue **Notes** button.

   The Add Additional Notes frame is displayed.
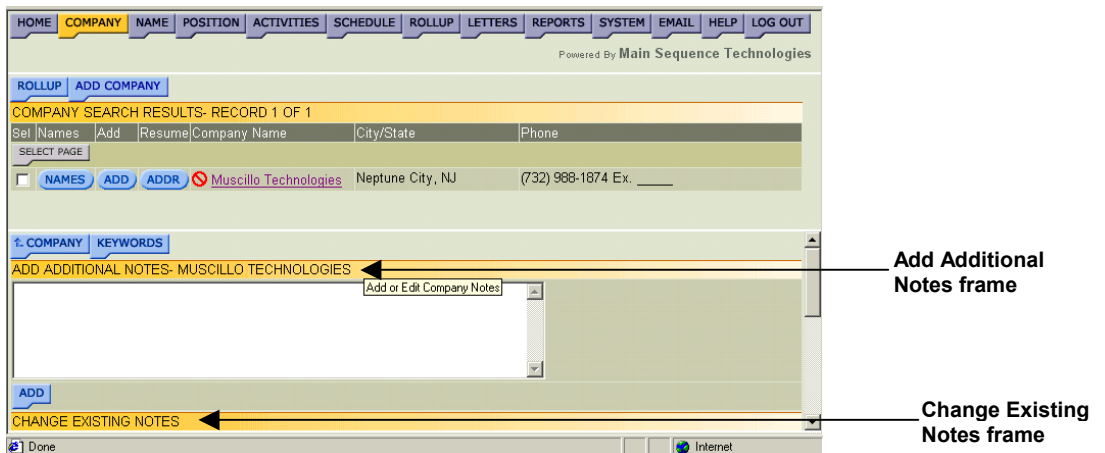
Figure 1-5

4. Type notes in the provided text box.

5. Click **Add**.

    The frame is refreshed and your notes are displayed in the Change Existing Notes frame located under the Add Additional Notes frame.

6. If desired, click **Keywords** to display the Add/Edit Keywords frame. Refer to Procedure 1-4 on page 1-8 for further details.

Changing Existing Notes

When you make edits to an existing note, only the text is updated. The original date, time, and author are not changed to reflect when the notes were edited.

Procedure 1-3   Changing Existing Notes

1. Retrieve the company record for which you want to change notes. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

    The Edit Company frame is displayed (Figure 1-4 on page 1-6).

3. Click the blue **Notes** button.

    The Add Additional Notes frame is displayed.

4. Using the scroll bar, display the Change Existing Notes frame.
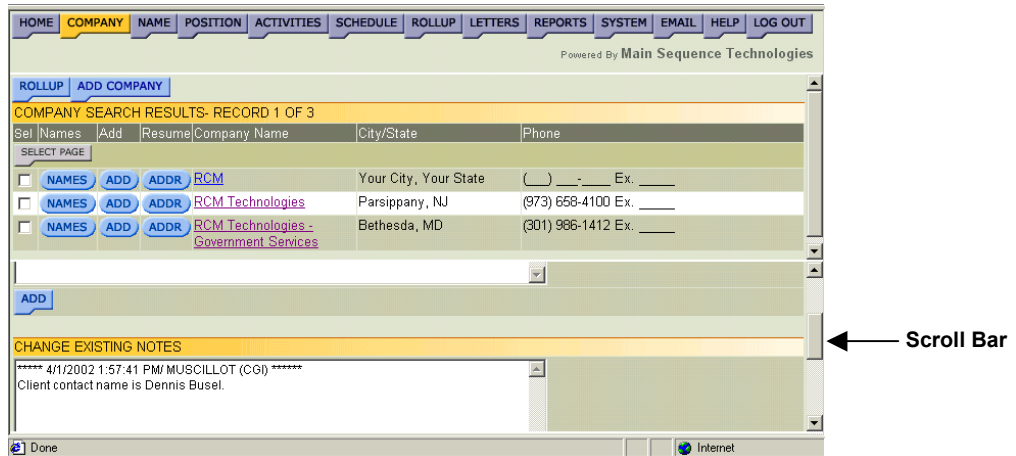
Figure 1-6

5. Make edits to the notes displayed.

6. Click **Save**.

    The frame is refreshed and your notes are displayed in the Change Existing Notes frame located under the Add Additional Notes frame.
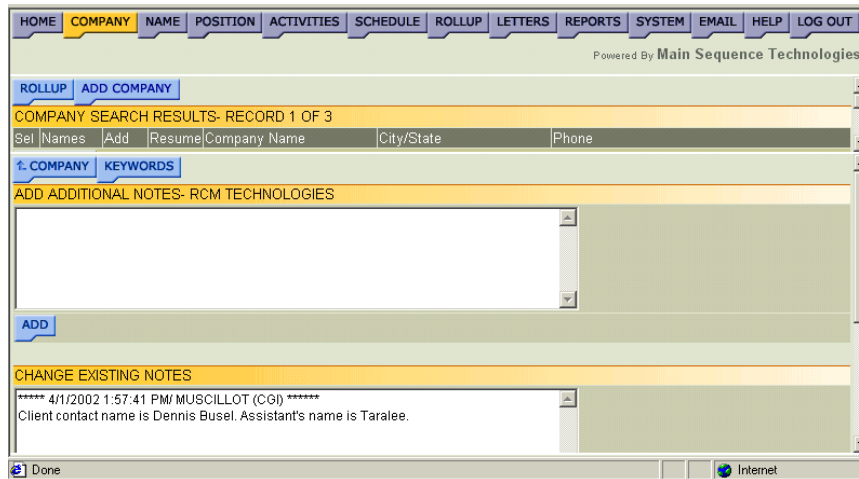
Figure 1-7

As illustrated in the figure above, the date and time remain the same.

7. If desired, do one or both of the following:

   - Click **Keywords** to display the Add/Edit Keywords frame.

     Refer to Procedure 1-4 on page 1-8 for further details.

   - Click **Company** to display the Edit Company frame.

     Read Editing Company Information on page 1-14 for further details.

Entering Company Keywords

You can use Company keywords to capture additional information about a company that is not contained in other frames or documents. Keywords are searchable; meaning, you can use the Keyword Search utility to search for companies based on the keywords you enter.

Procedure 1-4   Entering Company Keywords

1. Retrieve the company record for which you want to enter keywords. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.
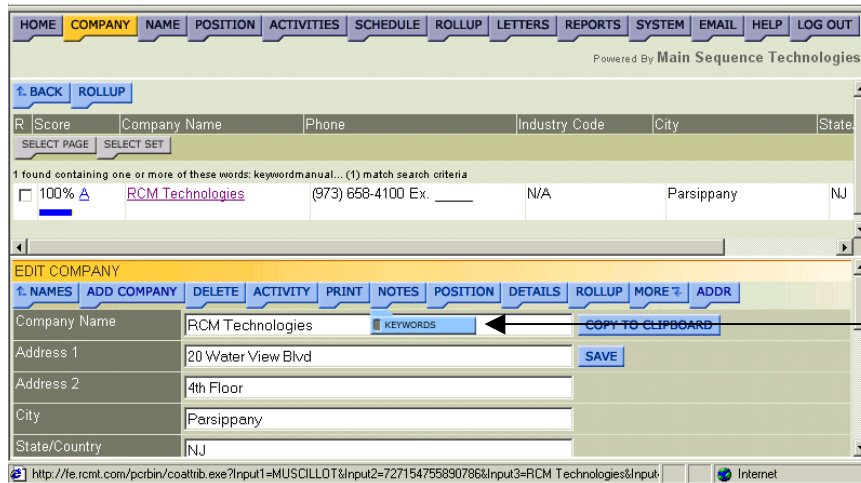
Figure 1-8

3. Choose **Notes/Keywords** (as illustrated in Figure 1-8).

   The Add/Edit Keywords frame is displayed.
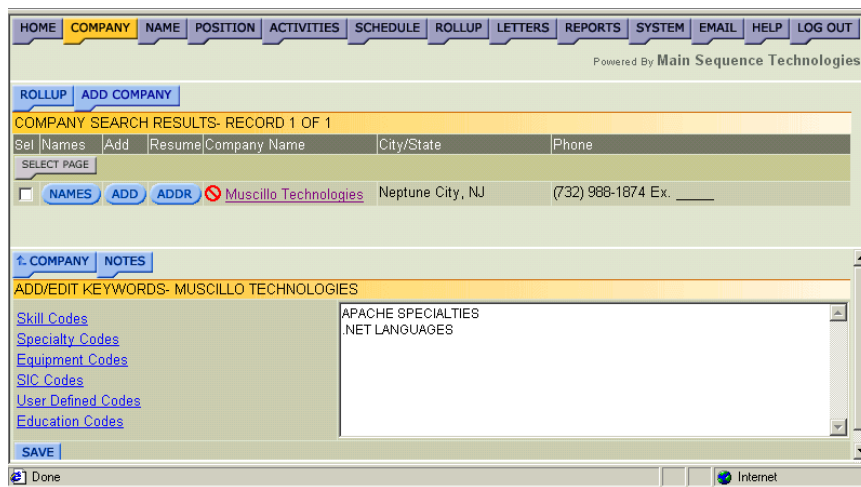
Figure 1-9

4. If you want to use predefined codes, select one of the provided links to display the Dropdown list window.

   For example, click Skill Codes to display the Dropdown list window illustrated below.
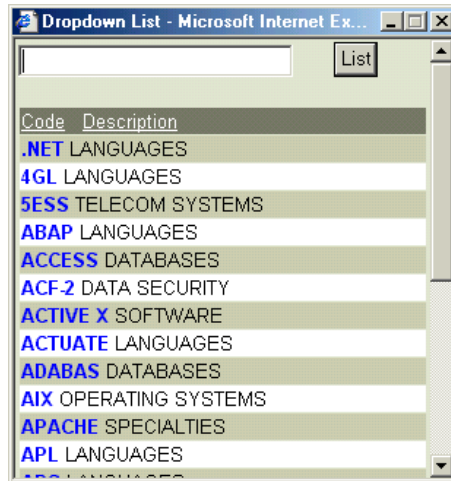
Figure 1-10

5. From the Dropdown list window, do the following:

- Select one or more keywords that describe the company.

  The Keywords are displayed in the provided text box as they are selected.

- Close the window to return to the Add/Edit Keywords frame.

6. If desired, type additional words in the provided text box.

7. Click **Save**.

   A Record Updated message is displayed.
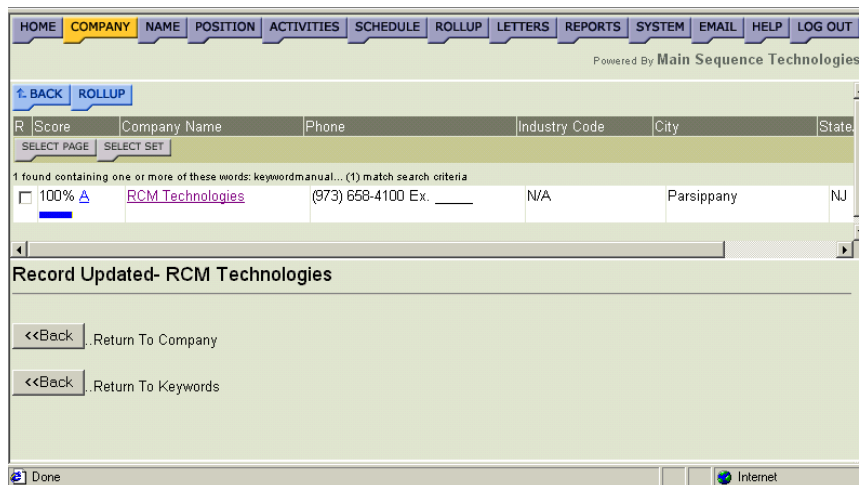
Figure 1-11

8. Do one of the following:

- Click the Return to Company **Back** button to display the Edit Company frame.

- Click the Return to Keywords **Back** button to display the Add/Edit Keywords frame.

Entering Additional Company Details

You can capture additional company email addresses and telephone numbers through the Company Custom Fields window. In addition, you can also capture company Equal Employment Opportunity information from this window.

Procedure 1-5   Entering Additional Company Details

1. Retrieve the company record for which you want to enter additional details. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.

Figure 1-12

3. Do one of the following:

- If you want to enter additional phone numbers, choose **Details/Phone Numbers**.

- If you want to enter additional e-mail addresses, choose **Details/Email Addresses**.

- If you want to enter Equal Employment Opportunity information, choose **Details/EEO Data**.

The Company Custom Fields window is displayed. The option you selected is displayed in the Field Type list box.

Figure 1-13

4. In the provided fields, enter the appropriate information.

   For example, in windows similar to Figure 1-13, add email addresses.

5. Click **Save**.

6. Do one of the following:

   - If you want to enter additional information, select a different field type from the provided list box and repeat this procedure.

     The fields in the window are updated to reflect your selection.

   - If you do not want to enter additional information, close the window to return to the Edit Company frame.

Viewing House Companies

When you first add a company to the database, you must indicate whether the company is a Client Company, an Available Company, or a Default Company. Client Companies are companies with which you have a working relationship. Available Companies are companies with which you would like to have a working relationship.

The Default Company that you select is specific to your login and is the company that displays in the bottom frame when you first log into PCRecruiter. All users can specify a Default Company. All companies entered in the database as Default Companies are referred to as House Accounts.

Procedure 1-6   Viewing House Companies

1. Click the purple **Company** button from the Browser header.

   The Company Menu frame is displayed.
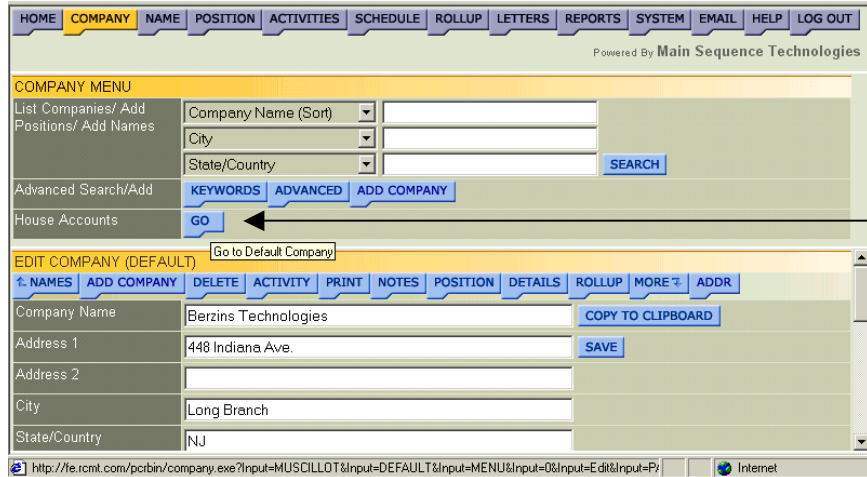
Figure 1-14

2. Click the blue House Accounts **Go** button.

   The Company Search Results frame is displayed. A list of all companies designated as Default Companies are displayed in alphabetical order.
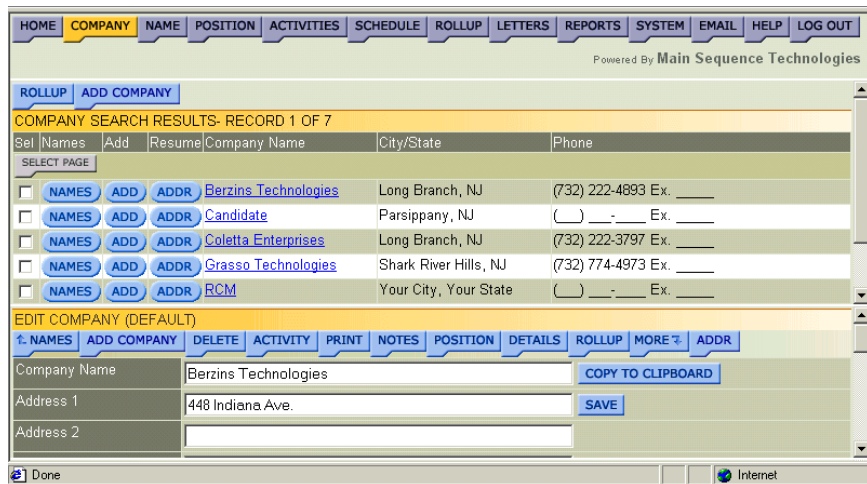
Figure 1-15

3. If desired, do one or more of the following:

- To add one or more companies to a Rollup List, select the corresponding check boxes of the companies you want to add to the same list and click **Rollup**.

  Read Adding Items to Existing Rollup Lists in Chapter 7 for further details.

- To add another company, click **Add Company**.

  Read Adding a Client Company on page 1-2 for further details.

- To view the names associated with the company, click the corresponding **Names** button.

  Read Viewing Company Name Associations on page 1-18 for further details.

- To associate a name with the company, click **Add** button to display the Add Name frame.

  Read Adding Names in Chapter 2 for further details.

- To associate a name and resume with the company, click the corresponding **ADDR** button to display the Add Resume window.

  Read Adding Names in Chapter 2 for further details.

- To edit the company information, click the company name to display the Edit Company frame.

  Read Editing Company Information on page 1-14 for further details.

Editing Company Information

Information added through the Add New Company frame can be changed through the Edit Company frame. In addition, from this frame you can also add activities, names, positions, notes, keywords, and resumes.

> **Tip:** If you want to display the Company name, address, and contact numbers in a format easy to copy, click the **Copy To Clipboard** button to display the text in the Copy To Clipboard window.

Procedure 1-7   Editing Company Information

1. Retrieve the company record you want to edit from the database. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.
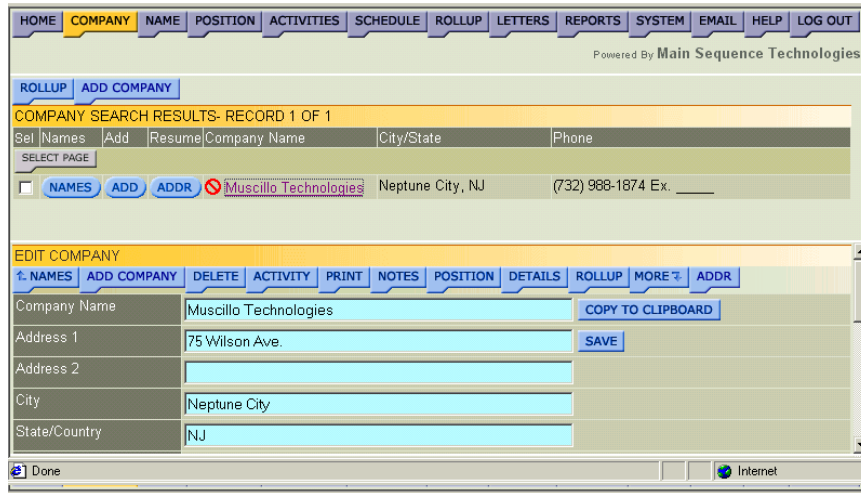
Figure 1-16

3. Make one or more of the following changes:

- In the provided fields, change the company's name, street address, city, state, and zip code.

- In the provided field, change the company's email address and/or Internet site.

- In the provided fields, change the company's telephone and fax numbers.

- In the provided field, change the company's Industry/Specialty.

- In the provided fields, change the company symbol or Division of information, the number of employees, and annual revenue.

- In the Subjective text box, change the subjective rate from 1 to 100 where 100 is a high rating.

- From the Default Company list box, select one of the following:

  - **Client Company**. Select this option to indicate that you have a working relationship with the company.

  - **Default Company**. Select this option to indicate that this company should display by default when entering the system.

  - **Available**. Select this option to indicate that you do not have a working relationship with the company.

4. Click **Save**.

Your changes are saved and the Edit Company frame is refreshed.

5. If desired, do one or more of the following:

- To view the names associated with the company, click the blue **Names** button.

    Read Viewing Company Name Associations 1-18 for further details.

- To add a new company, click the blue **Add Company** button.

    Read Adding a Client Company on page 1-2 for further details.

- To delete a company, click the blue **Delete** button.

    Read Deleting Companies on page 1-29 for further details.

    ✍ *Only users with Administrative permissions can perform this procedure.*

- To view company activities, click the blue **Activity** button.

    Read Working with Company Activities on page 1-21 for further details.

- To generate a Company Detail Report, click the blue **Print** button.

    Read Generating Company Detail Reports on page 1-17 for further details.

- To add notes about the company, click the blue **Notes** button.

    Read Maintaining Company Notes on page 1-5 for further details.

- To add keywords describing the company, click **Notes**/**Keywords**.

    Read Entering Company Keywords on page 1-8 for further details.

- To view positions associated with the company, click the blue **Position** button.

    Read Viewing Company Position Associations on page 1-20 for further details.

- To add the company to a Rollup List, click the blue **Rollup** button.

    Read Adding Items to Existing Rollup Lists in Chapter 7 for further details.

- To view what Rollup Lists to which the company belongs, click **Rollup**/**On Rollup**.

    Read Viewing Company Rollup List Associations on page 1-19 for further details.

- To associate a name and resume to the company, click the blue **ADDR** button.

  Read Adding Names in Chapter 2 for further details.

Generating Company Detail Reports

You can generate a Company Detail Report from the Edit Company frame. When you generate the report, it is opened in a new browser window. From the new browser window you can print the report to your network printer or save it to your local or network drive.

Note: PCRecruiter contains a complete reporting tool. To learn more, read Chapter 8, Generating Reports.

Procedure 1-8   Generating Company Detail Reports

1. Retrieve the company record for which you want to generate a report. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.

3. Click the blue **Print** button to generate the report.

   The Company Detail Report is launched in a new browser window.
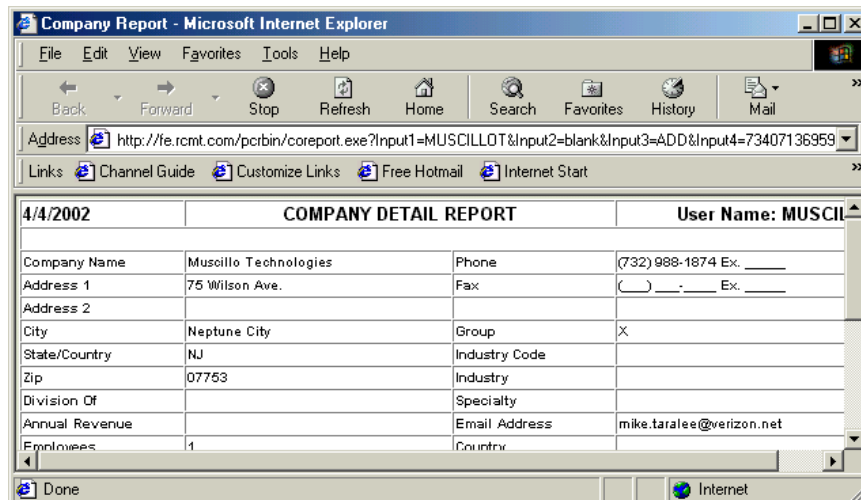
Figure 1-17

4. If desired, do one or both of the following:

   - Choose **File/Save** from the new browser window to save the report.

   - Choose **File/Print** from the new browser window to print the report.

Viewing Company Associations

As is discussed in later chapters, you cannot add a name or a position to the database without first associating it with a company. You can view the names and positions that a company is associated with from the Edit Company frame. In addition, from this frame you can also view to which Rollup Lists a company belongs. Refer to the following sections for complete details:

- Viewing Company Name Associations on page 1-18.

- Viewing Company Rollup List Associations on page 1-19.

- Viewing Company Position Associations on page 1-20.

Viewing Company Name Associations

As discussed in Chapter 2, you cannot add a name to either database without first associating it with a Client Company or the Candidate Company. You can view the names with which a company is associated from the Edit Company frame.

Procedure 1-9   Viewing Company Name Associations

1. Retrieve the company record for which you want to view Name associations. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.

3. Choose the blue **Names** button.

   A list of names associated with the company is displayed in the bottom frame.

Figure 1-18

4. If desired, do one of the following:

- To return to the previous screen, click the blue **Back** button.

- To associate a new name with the company, click the Blue **Add Name** button.

  ✍ *Use this feature to add a company employee or a non-candidate person. Read Adding Names in Chapter 2 for further details.*

- To associate a name and resume to the Candidate Company, click the blue **ADDR** button.

  ✍ *Use this feature to add Candidates to the Candidate Company only. Read Adding Names in Chapter 2 for further details.*

- To add names to a Rollup List, select the corresponding check boxes and then click **Rollup**.

  Read Adding Items to Existing Rollup Lists in Chapter 7 for further details.

Viewing Company Rollup List Associations

As is discussed in a later chapter, you can create Rollup Lists to which you can add companies, names, and positions. You can view to which Rollup Lists a company belongs from the Edit Company frame.

Procedure 1-10   Viewing Company Rollup List Associations

1. Retrieve the company record for which you want to view Rollup List associations. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed (Figure 1-4 on page 1-6).

3. Choose **Rollup/On Rollups**.

   The Rollup Membership frame is displayed.
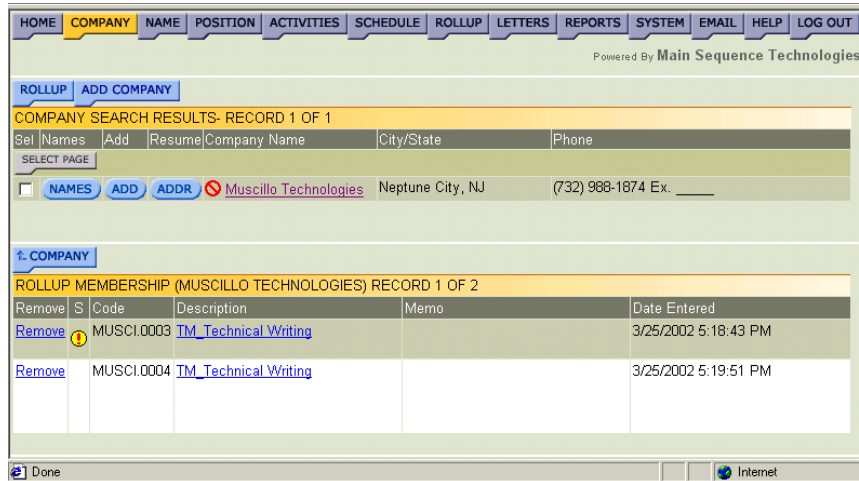
Figure 1-19

4. If desired, do one or more of the following:

- To delete the company from a Rollup List, click the corresponding **Remove** link.

- To return to the Edit Company frame, click the blue **Company** button.

- To view all the companies in a Rollup List, click the name of the Rollup List whose companies you want to view.

 The Rollup List frame is launched in a new browser window.

Viewing Company Position Associations

As is discussed in a later chapter, you cannot add a position to the database without first associating it with a company. You can view the positions with which a company is associated from the Edit Company frame.

Procedure 1-11   Viewing Company Position Associations

1. Retrieve the company record for which you want to view position associations. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

 The Edit Company frame is displayed.

3. Click the blue **Position** button.

 A list of positions associated with the company is displayed in the bottom frame.
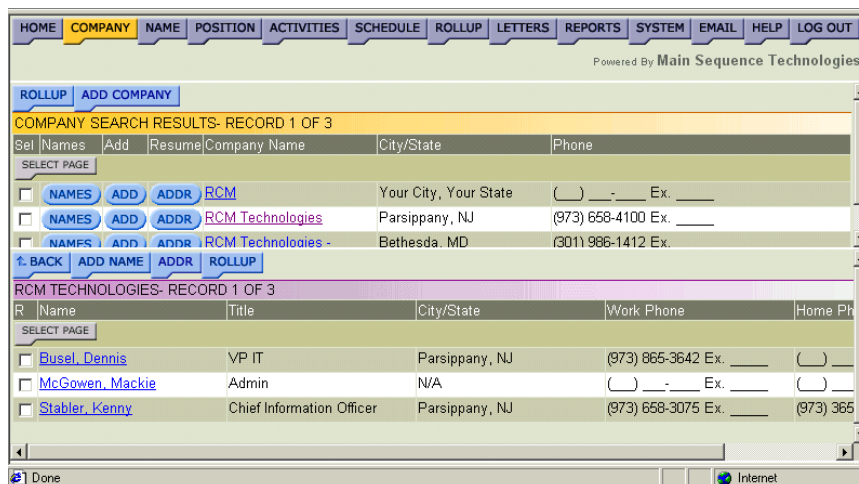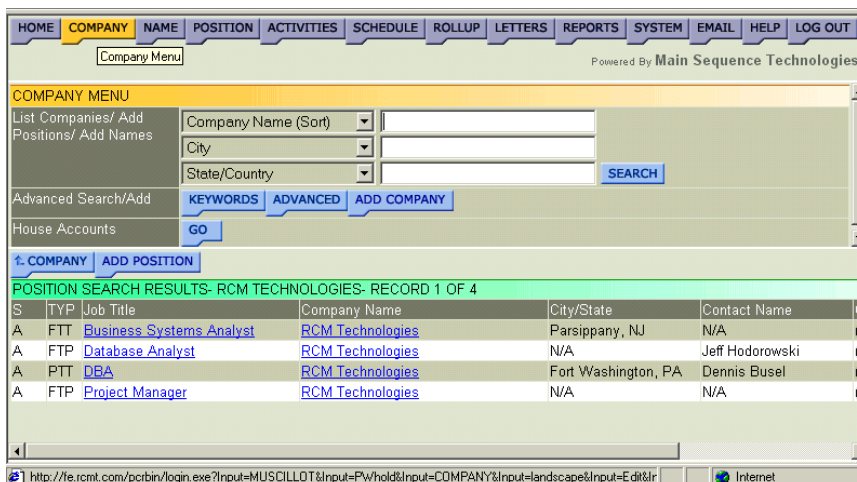
Figure 1-20

4. If desired, do one of the following:

- To return to the Edit Company frame, click the blue **Company** button.

- To associate a new position with the company, click the blue **Add Position** button.

  Read Adding Positions in Chapter 3 for further details.

Working with Company Activities

You can add activities to companies, names, and positions. However, when adding activities to names and positions, you also have the option of copying the activity to the company with which the name or position is associated.

You can view company activities from the Company Activities frame. All activities associated with the company are listed as well as any name or position activities that were copied to the company.

In addition, you can add new activities and generate a Company activity report from the Edit Company frame. Refer to the following sections for complete details:

- Viewing Company Activities on page 1-22.

- Adding Company Activities on page 1-23.

- Generating Company Activity Reports on page 1-26.

Viewing Company Activities

You can view company activities from the Company Activities frame. All activities associated with the company are displayed, including any name or position activities that were copied to the company.

Procedure 1-12   Viewing Company Activities

1. Retrieve the company record for which you want to view activities. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed (Figure 1-4 on page 1-6).

3. Click the blue **Activity** button.

   The Company Activities frame is displayed. All activities associated with the current company are displayed. In addition, any name or position activities that were copied to the company are also displayed.
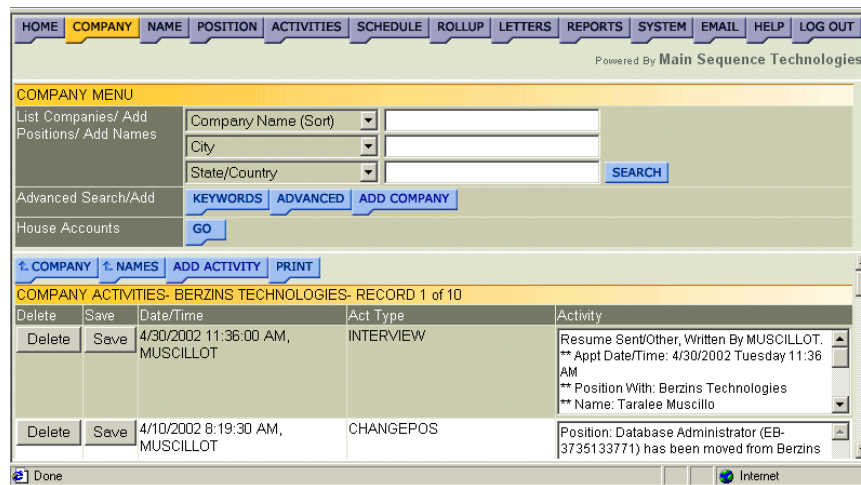
Figure 1-21

4. If desired, do one or more of the following:

   - Click the corresponding **Delete** button to delete an activity.

     ✍ *Only users with Administrative permissions can perform this task.*

   - In the Activity text box, make changes to the activity description and click the corresponding **Save** button.

     ✍ *Only users with Administrative permissions can perform this task.*

- Click the blue **Company** button to return to the Edit Company frame.

  Read Editing Company Information on page 1-14 for further details.

- Click the blue **Names** button to view names associated with the current company.

  Read Viewing Company Name Associations on page 1-18 for further details.

- Click the blue **Add Activity** button to create a new activity.

  Read Adding Company Activities on page 1-23 for further details.

- Click the blue **Print** button to generate an Activity Report.

  Read Generating Company Activity Reports on page 1-26 for further details.

Adding Company Activities

You can add company activities through the Add New Company Activity window. When adding a new activity, you can indicate whether you want to add it to the Schedule or configure a reminder alarm.

Note: Once you add an activity, you cannot edit or delete it.

Activities are different than notes. *Activities* are used to track events such as telephone calls and messages, candidate presentations, and client visits. *Notes* are used for information that is not likely to change and that cannot be added on another frame such as unique skills and attributes or past history.

Procedure 1-13   Adding Company Activities

1. Retrieve the company record for which you want to add an activity. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.
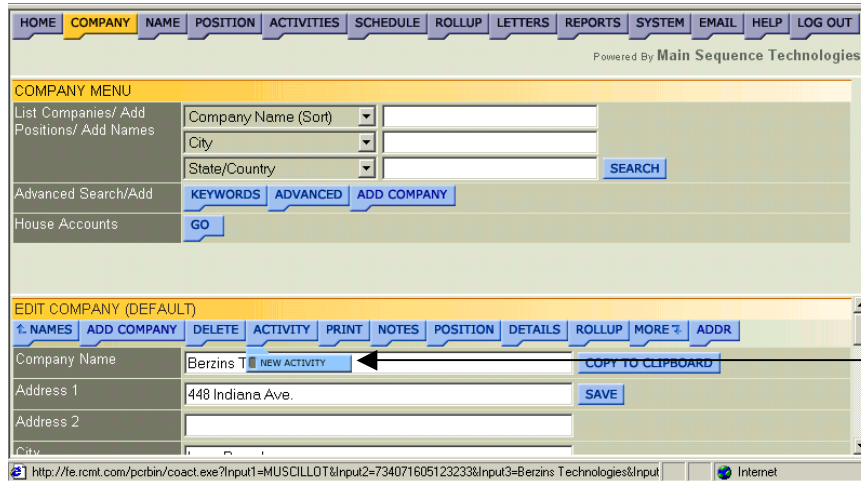
Figure 1-22

3. Choose **Activity/New Activity** (as illustrated in Figure 1-22).

   The Add New Company Activity window is displayed. The current date and time are displayed in the Date and Time text box.
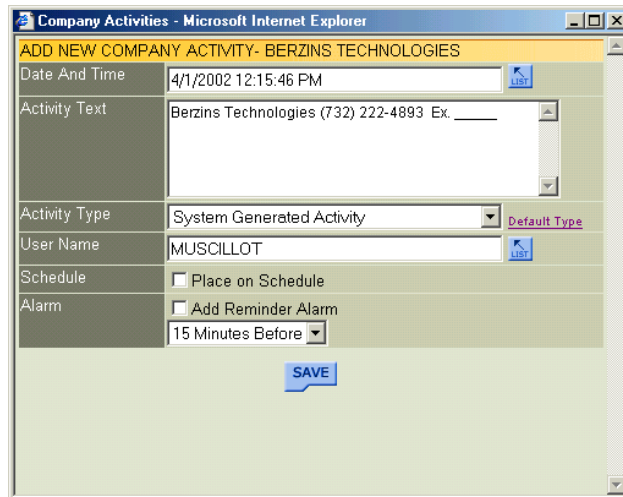
Figure 1-23

4. If you want to change the date and time, do the following:

    •   Click the Date and Time **List** button to display the Select Date and Time window.

Figure 1-24

    •   Use the provided controls to set a new date and time and click **OK**.

    You are returned to the Add New Company Activity window and your selections are displayed in the Date and Time text box.

5. If desired, in the Activity Text box, enter details about the new activity.

6. From the Activity Type list box, select the type that best describes the activity.

    > **Tip:** By default, System Generated Activity is displayed in the Activity Type list box. To change the default activity, select the **Default Type** link to display the Select Default Activity Type window, choose a different type from the provided list box, and click **Save** to return to the previous window.

7. Select the provided check box if you want to display the current activity on the Schedule.

    Note: To learn more about the Schedule Feature, read Chapter 6.

8. Configure Alarm options; do the following:

    •   Select the Add Reminder Alarm check box.

    •   From the provided list, indicate when the alarm should be generated (options range from 15 minutes to 3 days).

9. Click **Save**.

    The activity is saved and you are returned to the Edit Company frame. You can view this activity from several frames within PCRecruiter including the Company Activities frame; read Viewing Company Activities on page 1-22 for more details.

Generating Company Activity Reports

You can print a Company Activity Report from the Company Activities frame. When you print the report, it is opened in a new browser window. From the new browser window, you can print the report to your network printer or save it to your local or network drive.

Note: PCRecruiter contains a complete reporting tool. To learn more, read Chapter 8, Generating Reports.

Procedure 1-14   Generating Company Activity Reports

1. Retrieve the company record for which you want to generate a report. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

    The Edit Company frame is displayed (Figure 1-4 on page 1-6).

Figure 1-25

3. Click the blue **Activity** button.

    The Company Activities frame is displayed. All activities associated with the current company are displayed. In addition, any name or position activities that were copied to the company are also displayed.

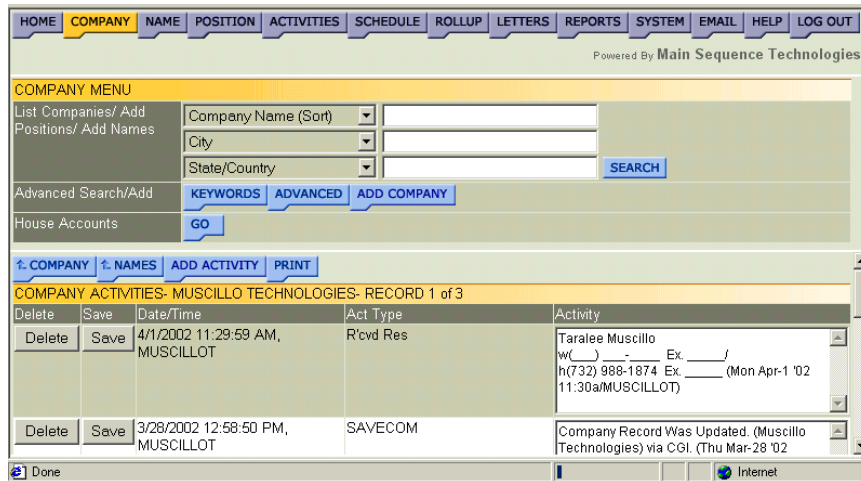**Figure 1-26**

4. Click the blue **Print** button to generate an Activity Report.

    The Company Activity Report is launched in a new browser window.
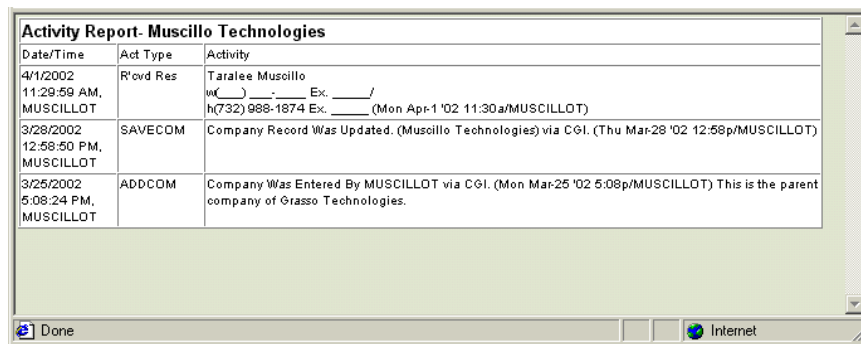
Figure 1-27

5. If desired, do one or both of the following:

    - Choose **File/Save** from the new browser window to save the report.

    - Choose **File/Print** from the new browser window to print the report.

Viewing Interviews

Interviews are associated with positions and positions are associated with companies. As such, you can view interviews that are associated with company positions.

Procedure 1-15   Viewing Interviews

1. Retrieve the Company record for which you want to view interviews. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.
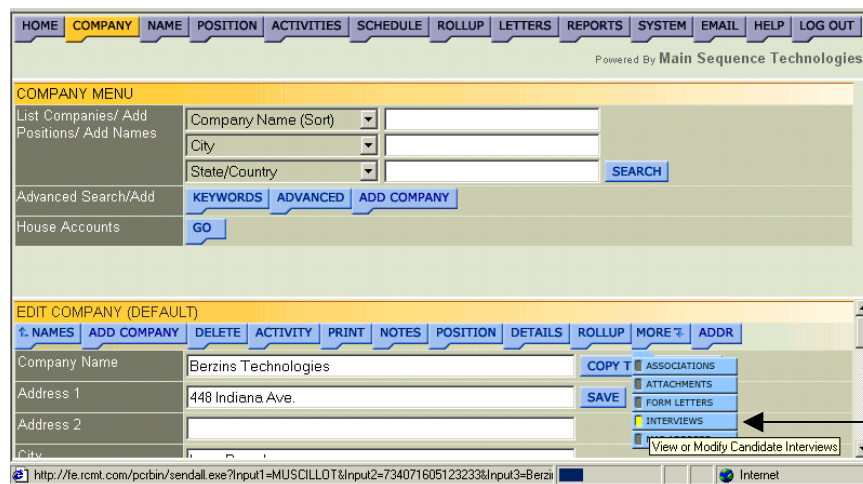
Figure 1-28

3. Choose **More/Interviews** (as illustrated in Figure 1-28).

   The Position frame is displayed in a new browser window.

4. Click the position whose interviews you want to view.

   The Interview List frame is displayed.
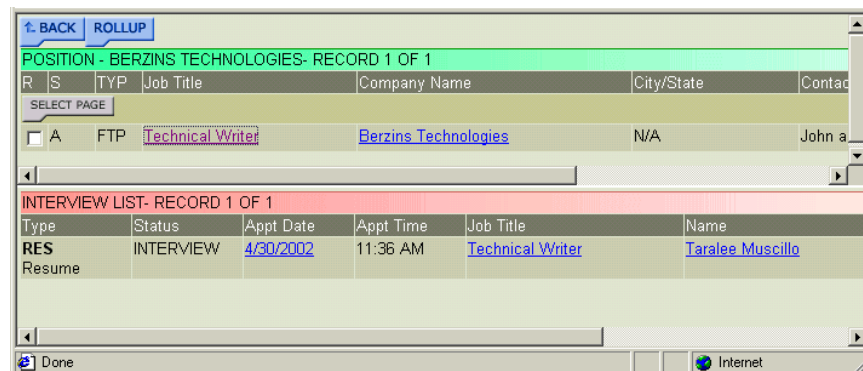
Figure 1-29

5. If desired, do one of the following:

- Click the Date link to display the Edit Interview frame.

  Read Changing Interviews in Chapter 3 for further details.

- Click the Job Title link to display the Edit Position frame.

  Read Editing Position Information in Chapter 3 for further details.

- Click the Name link to display the Edit Name frame.

  Read Editing Name Information in Chapter 2 for further details.

Deleting Companies

You can delete Companies that were added in error or that are no longer needed. Once a Company is deleted, it is removed from the database. However, you cannot delete a company that has a name or position associated with it.

Ʊ *Only users with Administrative permissions can perform this procedure.*

Procedure 1-16   Deleting Companies

1. Retrieve the company record you want to delete from the database. Read Chapter 4, Performing Searches for complete details.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.

3. Click the blue **Delete** button.

   A confirmation prompt is displayed.
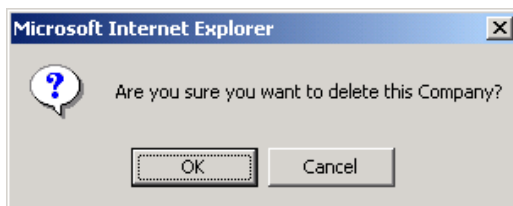
Figure 1-30

4. Click **OK** to confirm the deletion.

   A Delete Company message is displayed.

2

Working With Names

What You'll Find in This Chapter

This chapter describes Names. It explains the difference between a Candidate and a Non-candidate and how to add them. This chapter explains how to add and edit resumes, references, keywords, and notes. In addition, this chapter also explains how to view Name activities and how to add new activities. Refer to the following table for a description of the sections you will find in this chapter.

Table 2-1 What You'll Find in Chapter 2

If you want to…	Read…
Learn the difference between a Candidate and a Non-candidate and how to add them to the databases,	Adding Names on page 2-2.
Change a person's address, contact information, or add notes and keywords,	Editing Name Information on page 2-7.
Add or edit a Candidate's resume,	Editing Candidate Resumes on page 2-9.
Add or edit Candidate references,	Adding Candidate References on page 2-10.
Change the company with which a Non-candidate is associated,	Changing Company Associations on page 2-12.
Generate a report that contains name, address, contact numbers, notes, and keywords,	Generating Name Detail Reports on page 2-22.
Know to which Rollup Lists the person belongs,	Viewing Name Rollup List Associations on page 2-23.
View name activities, add an activity to a name, or generate a Name Activity Report,	Working with Name Activities on page 2-24.
View a list of interviews to which a name is associated,	Viewing Interviews on page 2-30.

If you want to…	Read…
Remove a person from one of the databases,	Deleting Names on page 2-31.

Adding Names

As mentioned previously, there are two types of names that are maintained within PCRecruiter: Candidates and Non-candidates. **Non-candidates** are Client Company employees such as Hiring Managers, Human Resource Personnel, and other executives. Non-candidate names are associated with the company for which they work and are maintained in the **Client** database along with Client Companies and Positions.

Candidates are potential employees and contractors that you want to place with Client Companies. Candidate names are always associated with the Candidate Company and are maintained in the **Candidate** database.

Adding a Candidate

As described above, candidates are associated with the Candidate Company and saved in the Candidate database. The following procedure accomplishes two tasks: it creates a new name record in the database and it adds the Candidate resume to the database.

Procedure 2-1   Adding a Candidate

1. Retrieve the Candidate Company. Read Chapter 4, Performing Searches for further details.
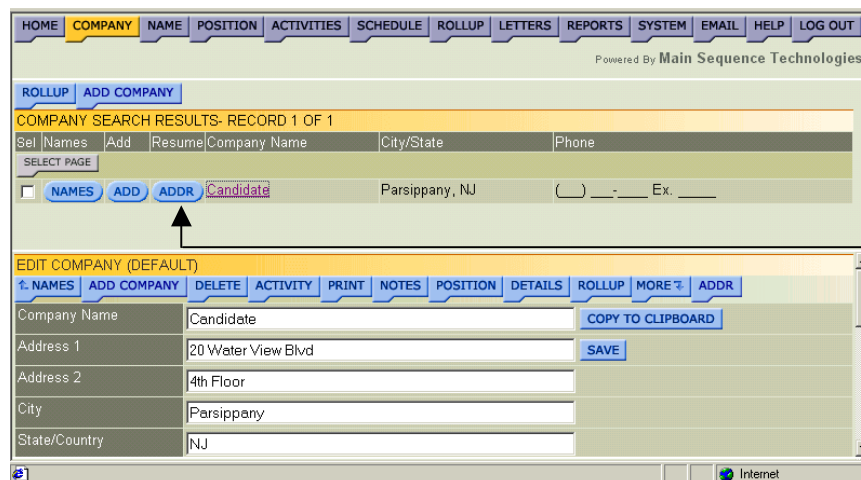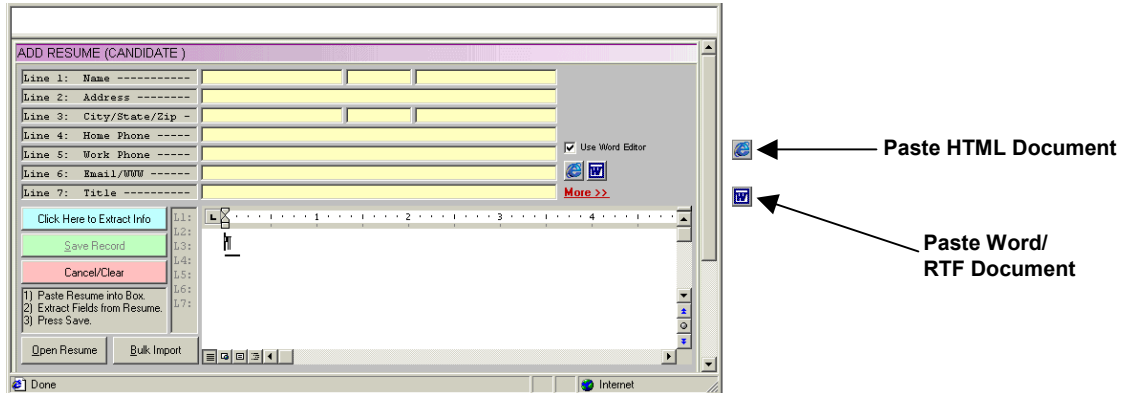
   The Search Results frame is displayed.

Figure 2-1

2. Click the blue **ADDR** button that corresponds with the Candidate Company with which you want to associate a new candidate.

    The Add Resume and Name window is displayed.

Figure 2-2

Any text previously copied to your desktop clipboard is displayed. If this information is not relevant, click the **Cancel/Clear** button.

3. Place your cursor in the provided text box and do one of the following:

    *   If you copied an HTML Resume and you *want* to maintain the HTML features, press **CTRL+V** or click the **Paste HTML Document** button.

    *   If you copied an HTML Resume and you *do not want* to maintain the HTML features, press **CTRL+V** or click the **Paste Word/RTF Document** button.

    *   If you copied a non-HTML Resume, press **CTRL+V** or click the **Paste Word/RTF Document** button.

    The resume is displayed in the text box.

4. Click the **Click Here to Extract Info** button.

    Name, address, and contact information is extracted and entered in the header lines. This information is used to create a new Candidate record.

Figure 2-3

5. If necessary, edit the information displayed in the row headers.

    Note: Header information must be edited in the white text box, not the yellow fields.

6. Click **Save Record.**

    The person is added to the database and associated with the Candidate Company. In addition, a confirmation message is displayed.

Adding a Non-candidate

As described above, Non-candidates are associated with Client Companies and saved in the Client database. After a Non-Candidate name is added to the database, the name and contact information is made available to you when addition new positions as described in Chapter 3.

Note: You can also perform this procedure to add a candidate to the Candidate Company if a resume is not available. You can later add the resume by performing Procedure 2-4 on page 2-9.

Procedure 2-2   Adding a Non-candidate

1. Retrieve the company record for which you want to associate a name. Read Chapter 4, Performing Searches for complete details.
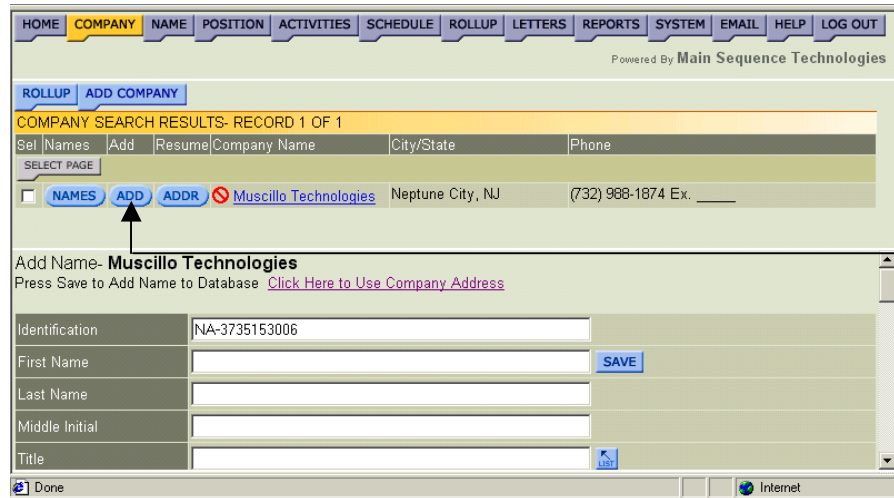
    The Search Results frame is displayed.

Figure 2-4

2. Click the blue **ADD** button that corresponds with the company with which you want to associate a Non-candidate.

    The Add Name frame is displayed (Refer to the bottom frame in Figure 2-4).

3. In the provided fields, enter the person's name, title, and salutation.

4. In the provided fields, enter the person's address and contact information.

5. In the provided fields, enter the person's salary information.

6. In the provided fields, enter the person's education information.

7. In the provided field, indicate whether the person is willing to relocate.

8. From the Status list box, indicate the type of name you are entering (e.g., Candidate, Employee, Reference, etc.).

9. In the provided field, enter the person's Industry/Specialty, do the following:

    - Click **List** to display the Dropdown List window.

Figure 2-5

    - Click the specialty that best describes the person.

      You are returned to the Add Name frame and your selection is displayed in the Industry/Specialty text box.

10. In the Profile Line text boxes, indicate the citizenship status and the company from which you received the candidate (For example, the company holding the H1 Visa.)

11. In the Subjective text box, rate the name from 1 to 100 where 100 is a high rating.

    This information is available at a glance when looking at Search Results. Names with a high subjective rate will have a long green line. Names with low or no subjective rate will have a short or no green line as illustrated below.

12. Click **Save**.

    A new name record is saved and the frame is refreshed. The selected name status is displayed in the frame title bar.

Editing Name Information

You can edit information about a Candidate or Non-Candidate through the Edit Name frame. In addition, from this frame you can also add activities, resumes, notes, keywords, and references.

> **Tip:** If you want to display the name, address, and contact numbers in a format easy to copy, click the **Copy To Clipboard** button to display the text in the Copy To Clipboard window.

Procedure 2-3   Editing Name Information

1. Retrieve the name record for which you want to edit information. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the search results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title.
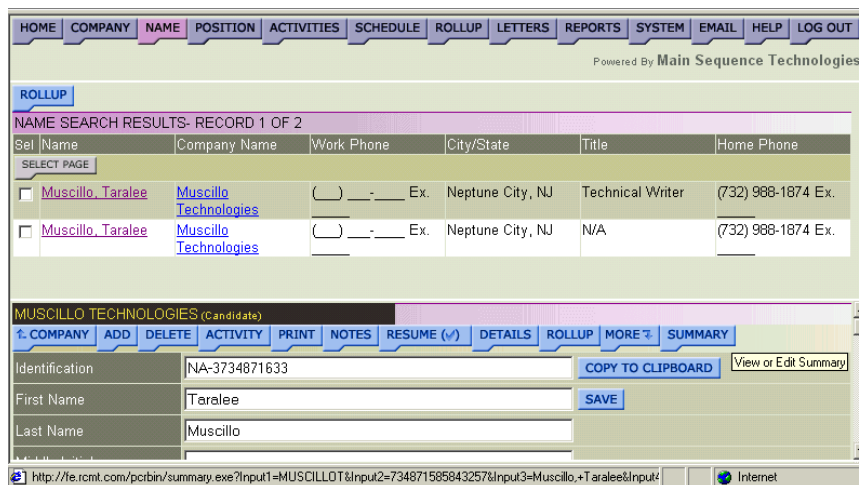

Figure 2-6

3. Make one or more of the following changes:

   - In the provided text boxes, change the person's name, title, and salutation.

   - In the provided text boxes, change the person's address and contact information.

   - In the provided text boxes, change the person's salary information.

   - In the provided text boxes, change the person's education information.

   - In the provided text box, indicate whether the person is willing to Relocate.

- From the Status list box, change the name type.

- In the provided text box, change the person's Industry/Status.

- In the Profile Line text boxes, indicate the citizenship status and the company from which you received the candidate (For example, the company holding the H1 Visa.)

- In the Subjective text box, change the subjective rate from 1 to 100 where 100 is a high rating.

4. Click **Save**.

5. If desired, do one or more of the following:

- Click the blue **Company** button to display the Edit Company frame.

  Read Editing Company Information in Chapter 1 for further details.

- Click the blue **Add** button to associate another name with the current company.

  Read Adding Names on page 2-2 for further details.

- Click the blue **Delete** button to delete the name record.

  ᛒ *Only users with Administrative permissions can perform this procedure.*

- Click the blue **Activity** button to view name activities.

  Read Working with Name Activities on page 2-24 for further details.

- Click the blue **Print** button to generate a Name Detail Report.

  Read Generating Name Detail Reports on page 2-22 for further details.

- Click the blue **Notes** button to add notes about the person.

  Read Maintaining Name Notes on page 2-14 for further details.

- Click **Notes**/**Keywords** to add keywords describing the person.

  Read Entering Name Keywords on page 2-17 for further details.

- Click the blue **Resume** button to add or edit a candidate's resume.

  Read Editing Candidate Resumes on page 2-9 for further details.

- Click the blue **Rollup** button to add the person to a Rollup List.

  Read Adding Items to Existing Rollup Lists in Chapter 7.

- Click **Rollup/On Rollup** to view what Rollup Lists to which the person belongs.

  Read Viewing Name Rollup List Associations on page 2-23 for further details.

- Click the blue **Summary** button to add candidate references.

  Read Adding Candidate References on page 2-10 for further details.

Editing Candidate Resumes

You can add a resume when creating a Candidate record as described in Procedure 2-1 on page 2-2 or by performing the following procedure. Once a resume has been added to the database, you can edit it from the Edit Resume frame. Resume text is searchable and can be queried when using the Keyword Search. To learn more about the Keyword Search, read Chapter 4, Performing Searches.

Procedure 2-4   Editing Candidate Resumes

1. Retrieve the name record for which you want to add or edit a resume. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the search results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title (Figure 2-6 on page 2-7).

3. Click the **Resume** button.

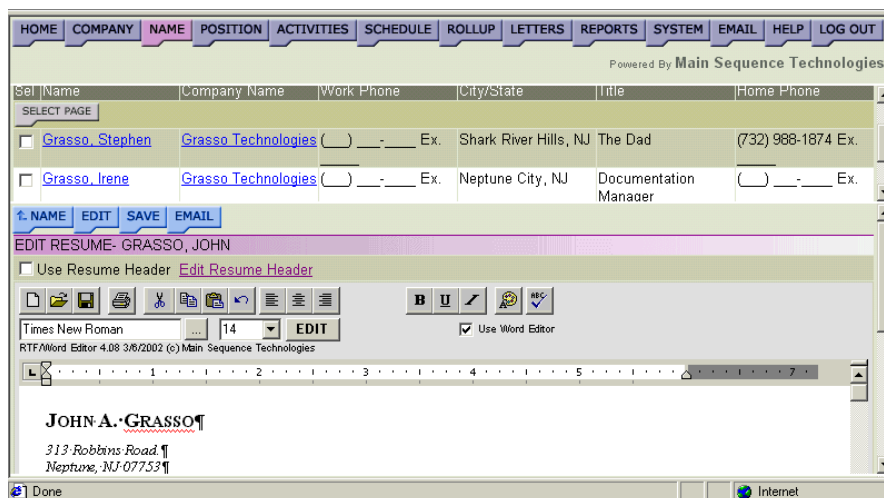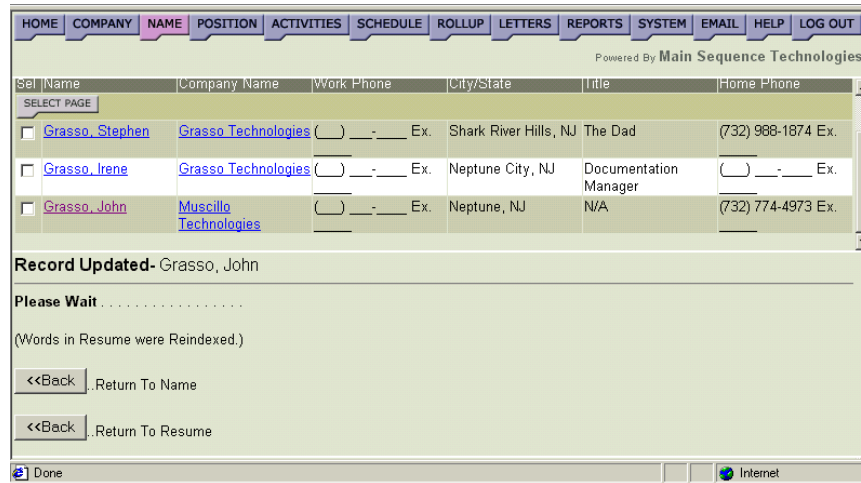   The Edit Resume frame is displayed. This frame contains common word processing tools.

Figure 2-7

4. Use the provided word processing tools to type, paste, or edit the resume.

5. Click **Save**.

   The resume is updated and a confirmation message is displayed.

Figure 2-8

6. Do one of the following:

   - Click the Return to Name **Back** button to display the Edit Name frame.

   - Click the Return to Resume **Back** button to display the Edit Resume frame.

Adding Candidate References

Candidate References are added through the PCRecruiter Summary screen. Once a candidate has been submitted and interviewed, the client may ask for the candidate's references or ask you to call the references. You can track these events through the Activity feature. When adding or scheduling the new activities choose the "Received Request for Info from Client" or "Checked or Checking References" Activity Type. Read Working with Name Activities on page 2-24 for further details.

Procedure 2-5   Adding Candidate References

1. Retrieve the candidate for which you want to add references. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the search results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title (Figure 2-6 on page 2-7).

3. Click the blue **Summary** button.

    The Edit Summary frame is displayed.

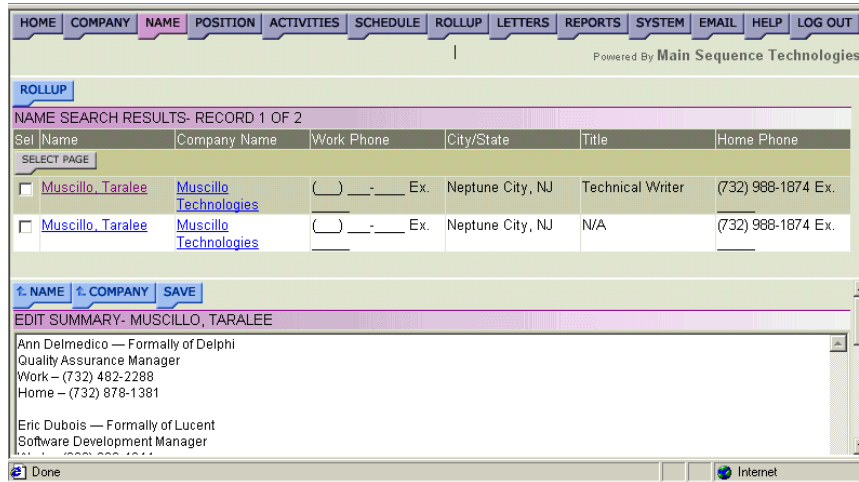4. Type or paste the candidate references in the provided text box.

Figure 2-9

5. Click **Save**.

    The references are saved and a confirmation message is displayed.

Figure 2-10

6. Do one of the following:

    - Click the Return to Name **Back** button to display the Edit Name frame.

    - Click the Return to Summary **Back** button to display the Edit Summary frame.

Changing Company Associations

You can change the company with which a person is associated. All Candidates should be associated with the Candidate Company; as such, only Non-candidates should be moved between companies. When a name is moved from one company to another, an activity is created detailing the transaction as illustrated in Figure 2-11.
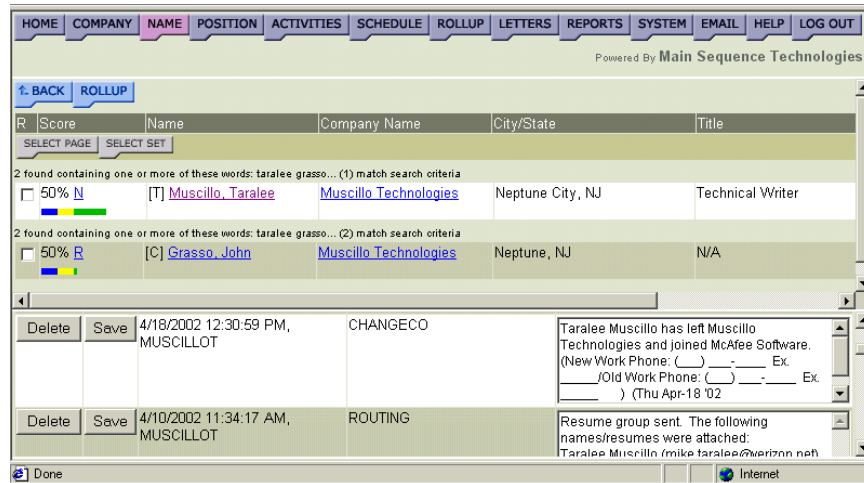

Figure 2-11

Procedure 2-6   Changing Company Associations

1. Retrieve the name record whose company association you want to change. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title.
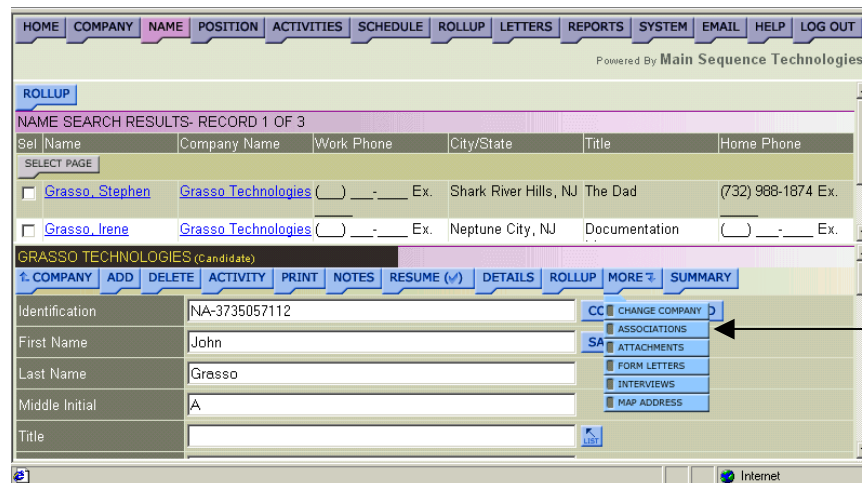

Figure 2-12

3. Choose **More/Change Company** (as illustrated in Figure 2-12).

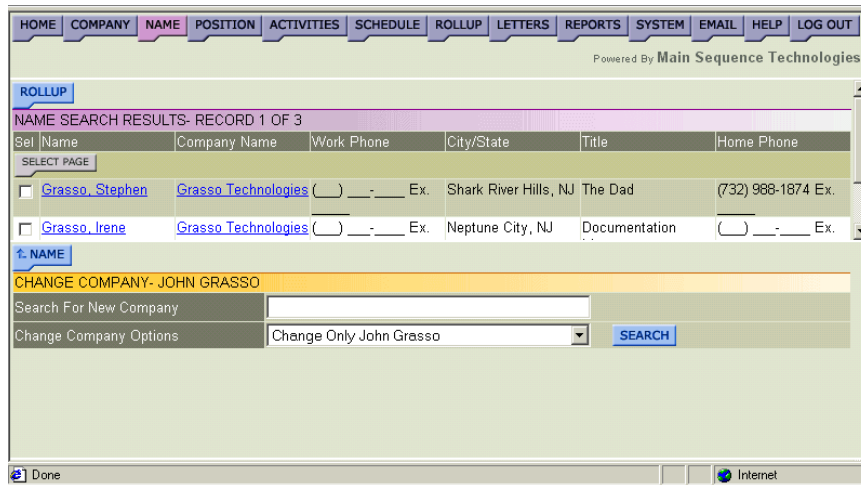4. The Change Company frame is displayed.

Figure 2-13

5. In the Search For New Company text box, type the name or the first few characters of the company to which you want to associate the current name and click **Search**.

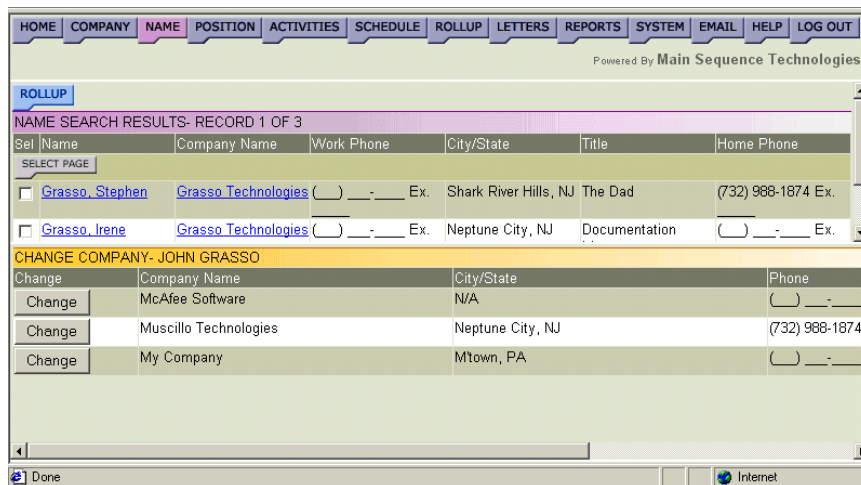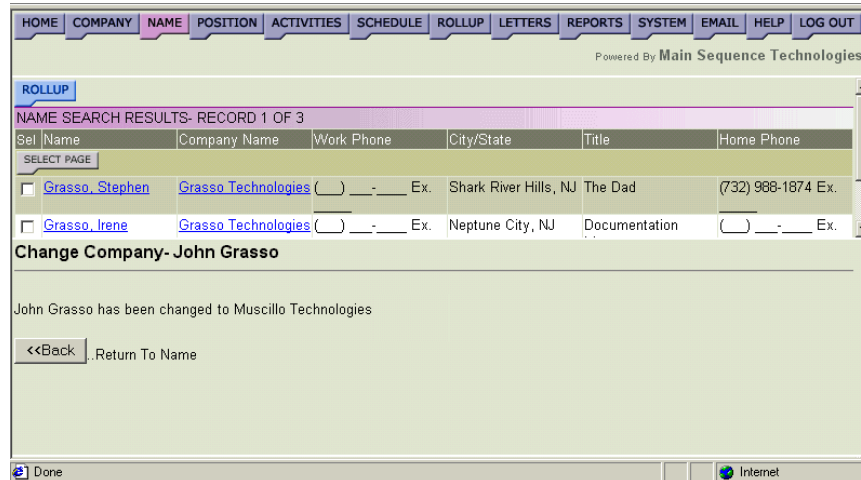A list of companies matching your criteria is displayed.

Figure 2-14

6. Click the **Change** button corresponding to the company with which you want to associate the current name.

   The name is associated to the selected company and a confirmation message is displayed.

Figure 2-15

7. Click the Return to Name **Back** button to display the Edit Name frame.

Maintaining Name Notes

You can use Name Notes to capture additional information about a person that is not contained in other frames or documents. The notes that you enter are searchable; meaning, you can use the Keyword Search utility to search for names based on the notes you enter.

Notes are different than activities. *Notes* are used for information that is not likely to change and that cannot be added on another frame such as unique skills and attributes or past history. *Activities* are used to track events such as telephone calls and messages, candidate presentations, and client visits.

Notes are added through the Add Additional Notes frame and edited through the Change Existing Notes frame. When a note is first entered, the date, time, and author are recorded. When a note is changed, the original date, time and author remain the same.

Refer to the following sections for complete details:

- Entering Name Notes on page 2-15.

- Changing Existing Notes on page 2-16.

Entering Name Notes

Name notes are added through the Add Additional Notes frame. When notes are added, the date, time, and author are recorded.

Procedure 2-7   Entering Name Notes

1. Retrieve the name record for which you want to enter notes. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title (Figure 2-6 on page 2-7).

3. Click the blue **Notes** button.

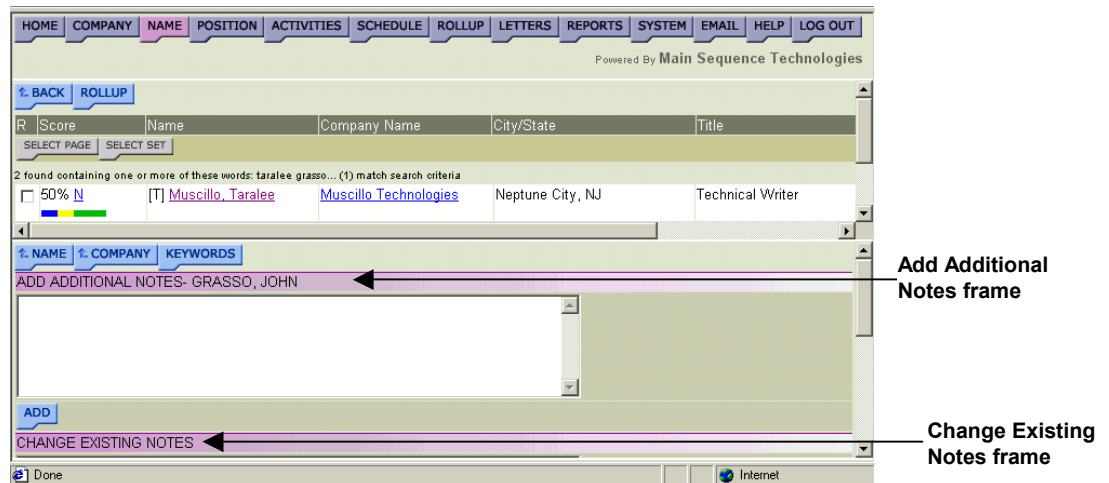   The Add Additional Notes frame is displayed.

Figure 2-16

4. Type notes in the provided text box.
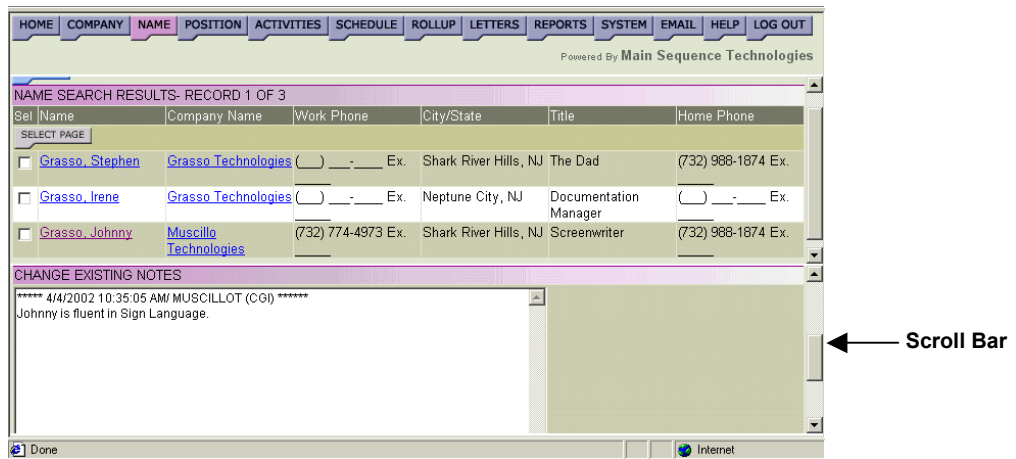
5. Click **Add**.

   The frame is refreshed and your notes are displayed in the Change Existing Notes frame located under the Add Additional Notes frame.

Changing Existing Notes

When you make edits to an existing note, only the text is updated. The original date, time, and author are not changed to reflect when the notes were edited.

Procedure 2-8   Changing Existing Notes

1. Retrieve the name record for which you want to change notes. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

    Name information is displayed and the company with which the name is associated is displayed in the frame title (Figure 2-6 on page 2-7).

3. Click the blue **Notes** button.

    The Add Additional Notes frame is displayed.

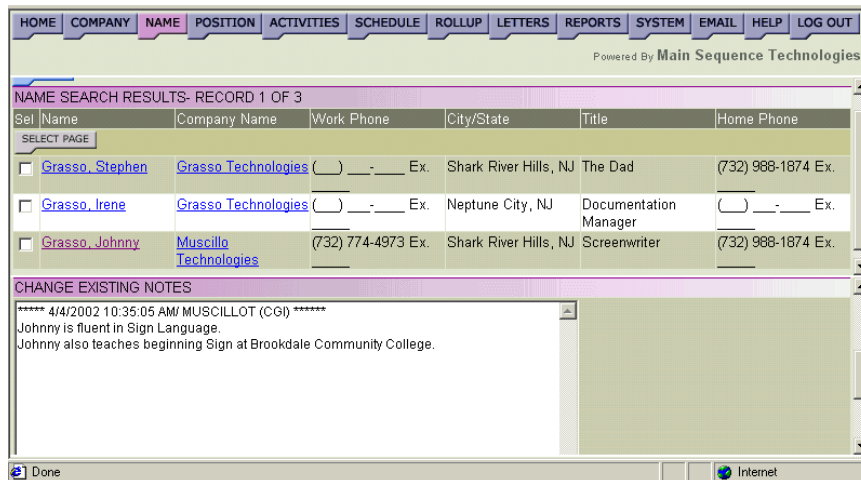4. Using the scroll bar, display the Change Existing Notes frame.

Figure 2-17

5. Make edits to the notes displayed.

6. Click **Save**.

   The frame is refreshed and your notes are displayed in the Change Existing Notes frame located under the Add Additional Notes frame.

Figure 2-18

As illustrated in the figure above, the date and time remain the same.

Entering Name Keywords

You can use Name keywords to capture additional information about a person that is not contained in other frames or documents. Keywords are searchable; meaning, you can use the Keyword Search utility to search for companies based on the keywords you enter.

Procedure 2-9   Entering Name Keywords

1. Retrieve the name record for which you want to enter keywords. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title.
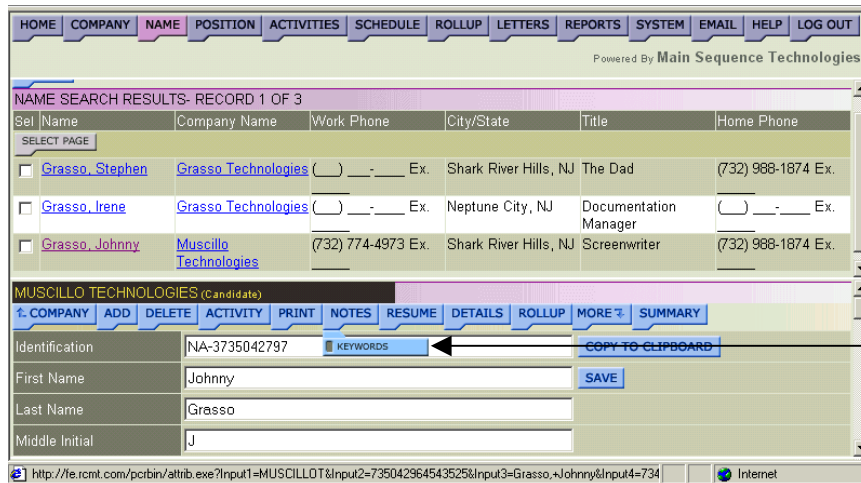
Figure 2-19

3. Choose **Notes/Keywords** (as illustrated in Figure 2-19).

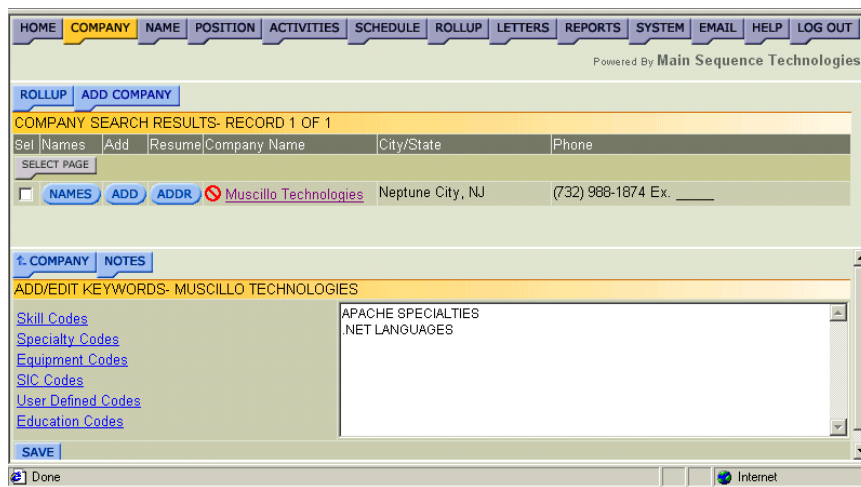   The Add/Edit Keywords frame is displayed.

Figure 2-20

4. If you want to use predefined codes, select one of the provided links to display the Dropdown list window.

    For example, click Skill Codes to display the Dropdown list window illustrated below.
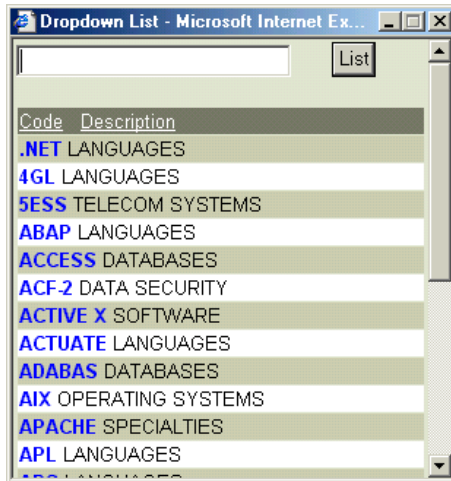
Figure 2-21

5. From the Dropdown list window, do the following:

- Select one or more keywords that describe the person.

  The Keywords are displayed in the provided text box as they are selected.

- Close the window to return to the Add/Edit Keywords frame.

6. If desired, type additional words in the provided text box.

7. Click **Save**.

   A Record Updated message is displayed.

Figure 2-22

8. Do one of the following:

- Click the Return to Name **Back** button to display the Edit Name frame.

- Click the Return to Keywords **Back** button to display the Add/Edit Keywords frame.

Entering Additional Name Details

You can capture additional details about a person through Name Custom Fields window. Specific information you can capture include:

- **Telephone/Contact Numbers** such as the person's pager number or the telephone numbers of the person's spouse, parents, or children.

- **Email Addresses** such as the person's work, home, Hotmail, and AOL email addresses.

- **Contract** such as the person's desired pay rate, your bill rate, and start/end dates.

Procedure 2-10   Entering Additional Name Details

1. Retrieve the name record for which you want to enter details. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title.
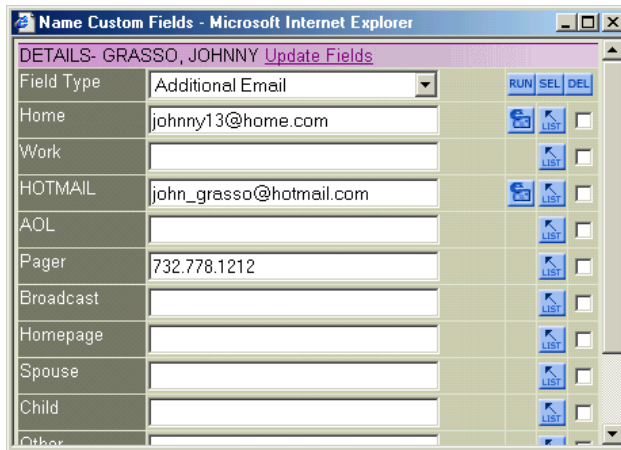

Figure 2-23

3. Do one of the following:

- If you want to enter additional phone numbers, choose Details/Phone Numbers.

- If you want to enter additional e-mail addresses, choose Details/Email Addresses.

- If you want to enter Equal Employment Opportunity information, choose **Details/EEO Data**.

- If you want to enter Contract information, choose **Details/Contract.**

The Name Custom Fields window is displayed. The option you selected is displayed in the Field Type list box.

Figure 2-24

4. In the provided fields, enter the appropriate information.

For example, in windows similar to Figure 2-24, add email addresses.

5. Click **Save**.

6. Do one of the following:

- If you want to enter additional information, select a different field type from the provided list box and repeat this procedure.

The fields in the window are updated to reflect your selection.

- If you do not want to enter additional information, close the window to return to the previous frame.

Generating Name Detail Reports

You can generate a Name Detail Report. When you generate the report, it is opened in a new browser window. From the new browser window you can print the report to your network printer or save it to your local or network drive.

Note: PCRecruiter contains a complete reporting tool. To learn more, read Chapter 8, Generating Reports.

Procedure 2-11   Generating Name Detail Reports

1. Retrieve the name record for which you want to generate a report. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title (Figure 2-6 on page 2-7).

3. Click the blue **Print** button to generate the report.

   The Name Detail Report is launched in a new browser window.
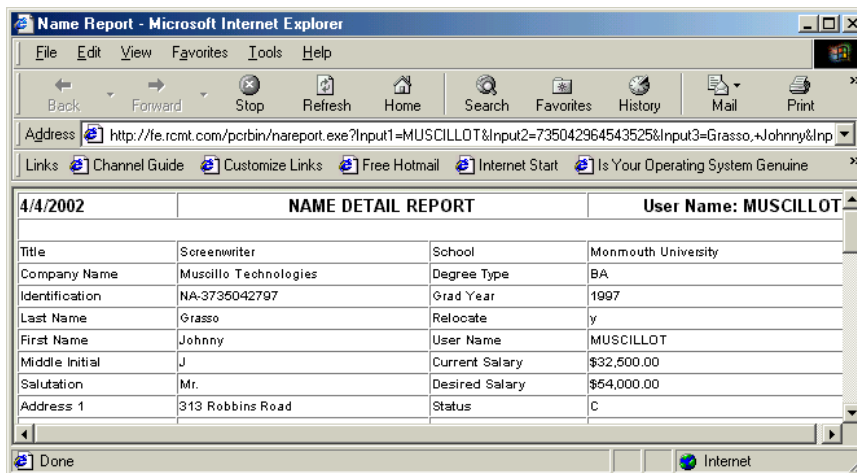
Figure 2-25

4. If desired, do one or both of the following:

   - Choose **File/Save** from the new browser window to save the report.

   - Choose **File/Print** from the new browser window to print the report.

Viewing Name Rollup List Associations

As is discussed in a later chapter, you can create Rollup Lists to which you can add companies, names, and positions.

Procedure 2-12   Viewing Name Rollup List Associations

1. Retrieve the name record for which you want to view Rollup List associations. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title.
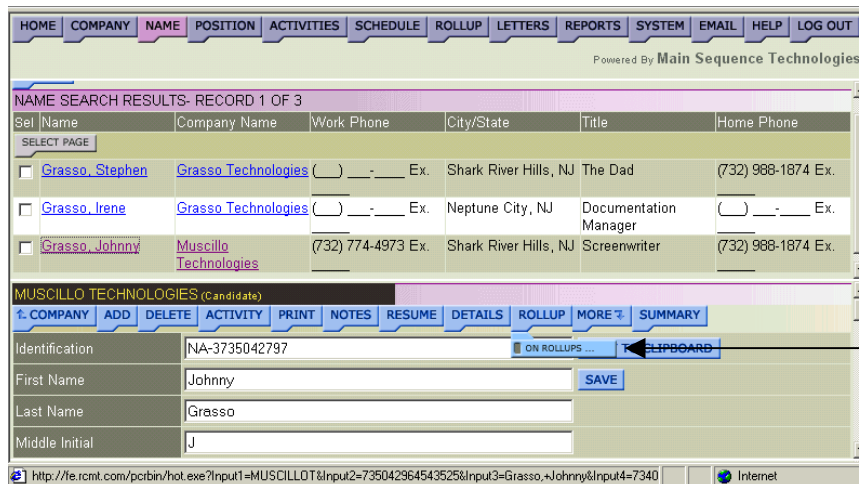

Figure 2-26

3. Choose **Rollup/On Rollups** (as illustrated in Figure 2-26).
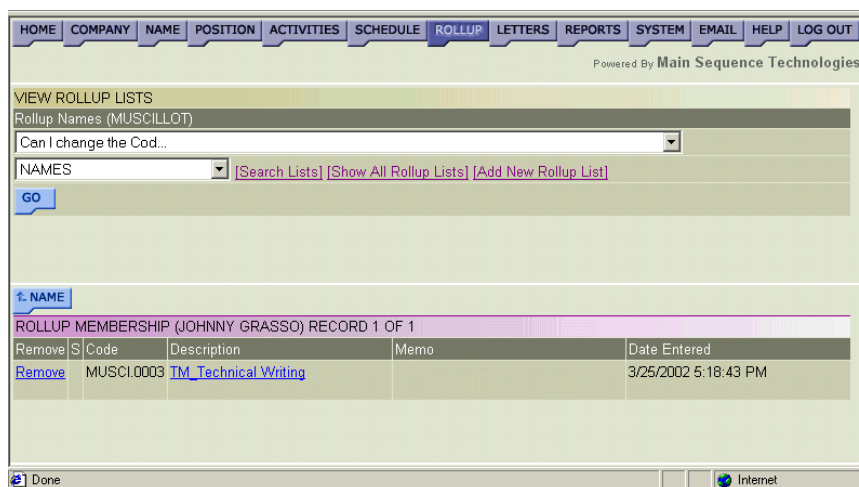
   The Rollup Membership frame is displayed.

Figure 2-27

4. If desired, do one or more of the following:

- To delete the person from a Rollup List, click the corresponding **Remove** link.

- To return to the previous frame, click the blue **Name** button.

- To view all the people in a Rollup List, click the name of the Rollup List whose names you want to view.

  The Rollup List frame is launched in a new browser window.

Working with Name Activities

You can add activities to companies, names, and positions. However, when adding activities to names and positions, you also have the option of copying the activity to the company with which the name or position is associated.

You can view name activities from the Name Activities frame. In addition, you can add new activities and generate a Name activity report. Refer to the following sections for complete details:

- Viewing Name Activities on page 2-24.

- Adding Name Activities on page 2-26.

- Generating Name Activity Reports on page 2-28.

Viewing Name Activities

You can view all activities associated with a person.

Procedure 2-13   Viewing Name Activities

1. Retrieve the name record for which you want to view activities. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title (Figure 2-6 on page 2-7).

3. Click the blue **Activity** button.

   The Name Activities frame is displayed. All activities associated with the current name are displayed.
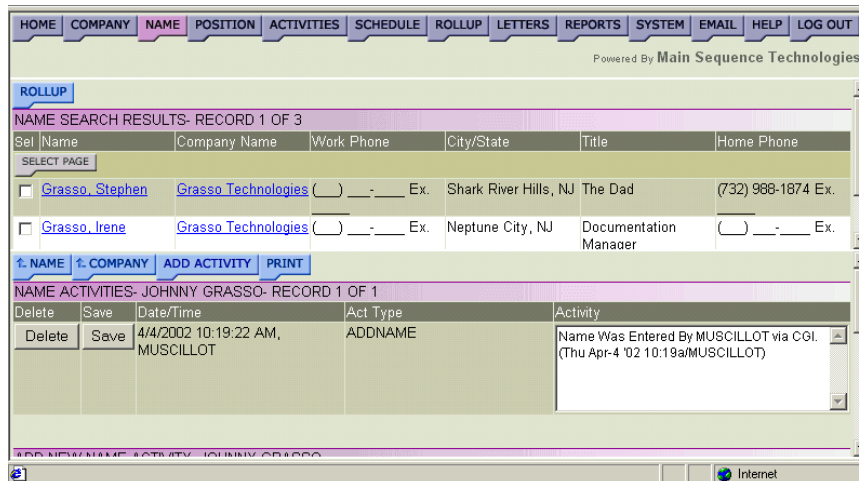
Figure 2-28

4. If desired, do one or more of the following:

- Click the corresponding **Delete** button to delete an activity.

  Only users with Administrative permissions can perform this task.

- In the Activity text box, make changes to the activity description and click the corresponding **Save** button.

  Only users with Administrative permissions can perform this task.

- Click the blue **Names** button to return to the previous Name frame.

- Click the blue **Company** button to display the Edit Company frame.

  Read Editing Company Information in Chapter 1 for further details.

- Click the blue **Add Activity** button to create a new activity.

  Read Adding Name Activities on page 2-26 for further details.

- Click the blue **Print** button to generate an Activity Report.

  Read Generating Name Detail Reports on page 2-1 for further details.

Adding Name Activities

You can add name activities through the Add New Name Activity window. When adding a new activity, you can indicate whether you want to add it to the Schedule, copy it to the parent company, or configure a reminder alarm.

Note: Once you add an activity, you cannot edit or delete it.

Activities are different than notes. *Activities* are used to track events such as telephone calls and messages, candidate interviews, and client visits. *Notes* are used for information that is not likely to change and that cannot be added on another frame such as unique skills and attributes or past history.

Procedure 2-14   Adding Name Activities

1. Retrieve the name record for which you want to add an activity. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.
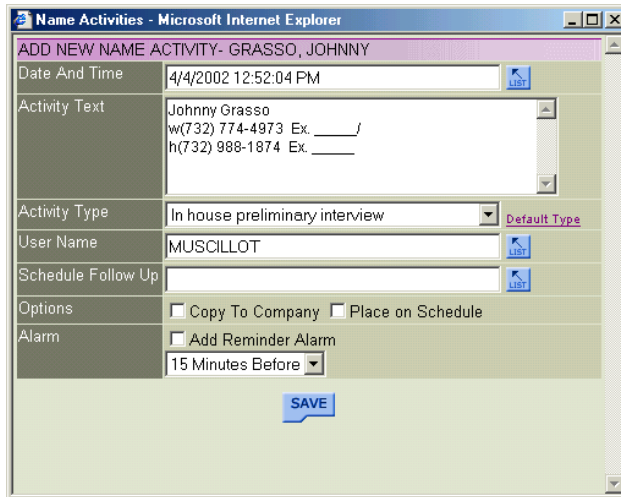
    Name information is displayed and the company with which the name is associated is displayed in the frame title.
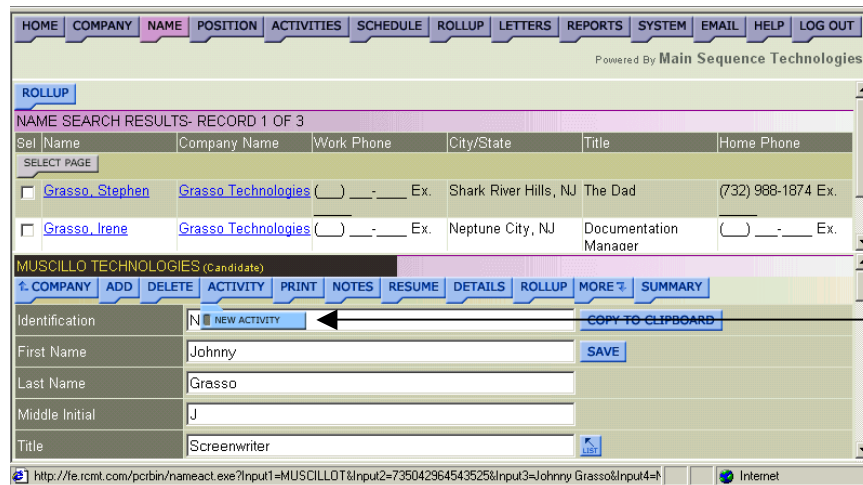
Figure 2-29

3. Choose **Activity/New Activity** (as illustrated in Figure 2-29).

    The Add New Name Activity window is displayed. The current date and time are displayed in the Date and Time text box.

Figure 2-30

4. If you want to change the date and time, do the following:

- Click the Date and Time **List** button to display the Select Date and Time window.

Figure 2-31

- Use the provided controls to set a new date and time and click **OK**.

You are returned to the Add New Name Activity window and your selections are displayed in the Date and Time text box.

5. If desired, in the Activity Text box, enter details about the activity.

6. From the Activity Type list box, select the type that best describes the activity.

> **Tip:** By default, System Generated Activity is displayed in the Activity Type list box. To change the default activity, select the **Default Type** link to display the Select Default Activity Type window, choose a different type from the provided list box, and click **Save** to return to the previous window.

7. Select the provided check box if you want to copy the current activity to the company with which the name is associated.

8. Select the provided check box if you want to display the current activity on the Schedule.

Note: To learn more about the Schedule Feature, read Chapter 6.

9. Configure Alarm options; do the following:

   - Select the Add Reminder Alarm check box.

   - From the provided list, indicate when the alarm should be generated (options range from 15 minutes to 3 days).

10. Click **Save**.

The activity is saved and you are returned to the previous frame. You can view this activity from several frames within PCRecruiter including the Name Activities frame; read Viewing Name Activities on page 2-24 for more details.

Generating Name Activity Reports

You can print a Name Activity Report from the Name Activities frame. When you print the report, it is opened in a new browser window. From the new browser window, you can print the report to your network printer or save it to your local or network drive.

Note: PCRecruiter contains a complete reporting tool. To learn more, read Chapter 8, Generating Reports.

Procedure 2-15   Generating Name Activity Reports

1. Retrieve the name record for which you want to generate a report. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

Name information is displayed and the company with which the name is associated is displayed in the frame title (Figure 2-6 on page 2-7).

3. Click the blue **Activity** button.

The Name Activities frame is displayed. All activities associated with the current person are displayed.
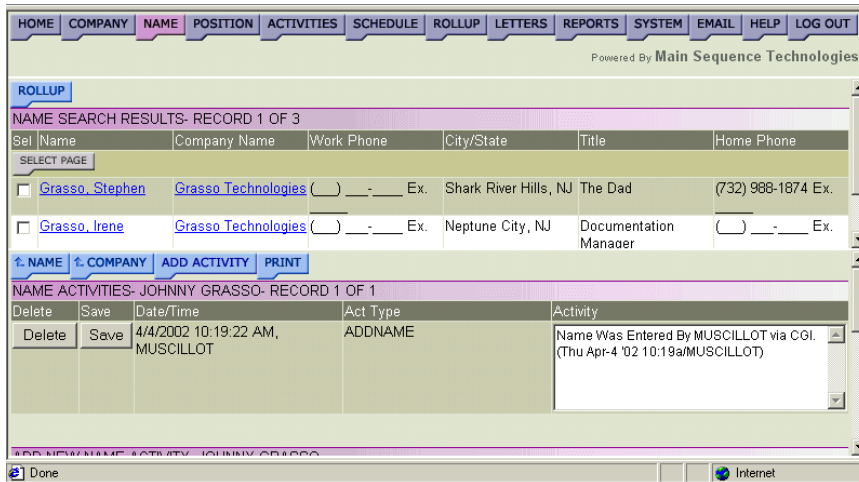

Figure 2-32

4. Click the blue **Print** button to generate an Activity Report.

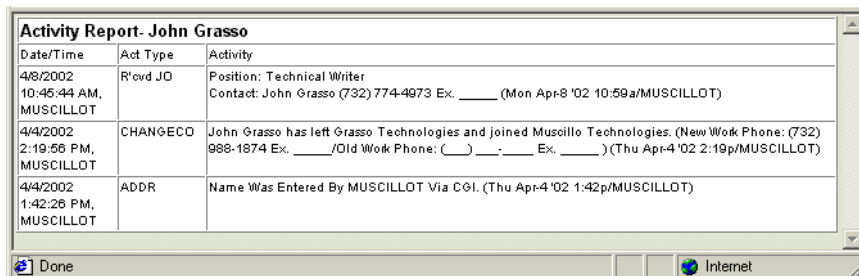The Name Activity Report is launched in a new browser window.

Figure 2-33

5. If desired, do one or both of the following:

• Choose **File/Save** from the new browser window to save the report.

• Choose **File/Print** from the new browser window to print the report.

Viewing Interviews

Names are associated with Interviews and interviews are associated with positions. As such, you can view interviews that are associated with names.

Procedure 2-16   Viewing Interviews

1. Retrieve the name record for which you want to generate a report. Read Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

3. Name information is displayed and the company with which the name is associated is displayed in the frame title.
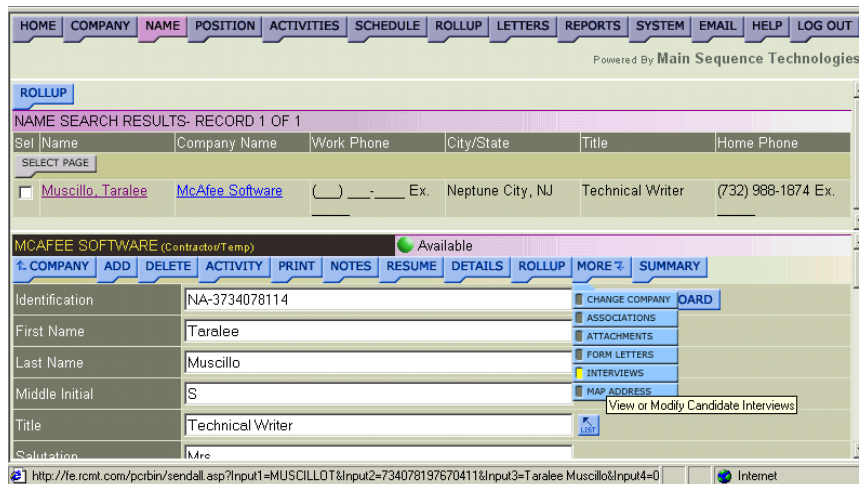
Figure 2-34

4. Choose **More/Interviews.**

   The Position frame is displayed in a new browser window.

5. Click the position whose interviews you want to view.
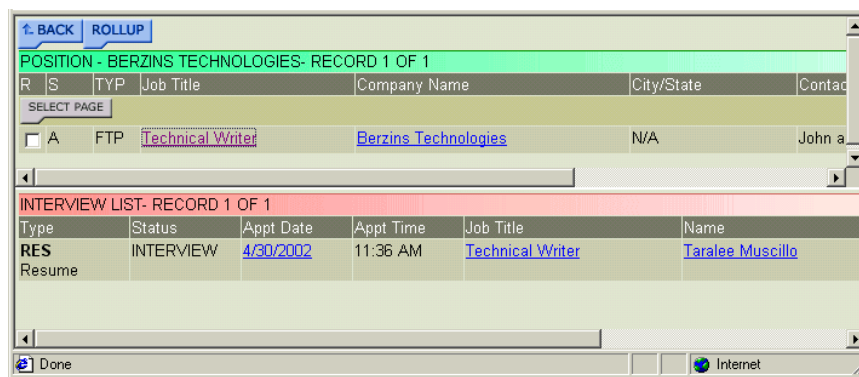
   The Interview List frame is displayed.

Figure 2-35

6. If desired, do one of the following:

- Click the Date link to display the Edit Interview frame.

  Read Changing Interviews in Chapter 3 for further details.

- Click the Job Title link to display the Edit Position frame.

  Read Editing Position Information in Chapter 3 for further details.

- Click the Name link to display the Edit Name frame.

 Read Editing Name Information in Chapter 2 for further details.

Deleting Names

You can delete Names that were added in error or that are no longer needed. Once a Name is deleted, it is removed from the database.

✍ *Only users with Administrative permissions can perform this procedure.*

Procedure 2-17   Deleting Names

1. Retrieve the name record you want to delete from the database. Chapter 4, Performing Searches for complete details.

2. Select the desired name from the Search Results frame.

   Name information is displayed and the company with which the name is associated is displayed in the frame title (Figure 2-6 on page 2-7).

3. Click the blue **Delete** button.

   A confirmation prompt is displayed.
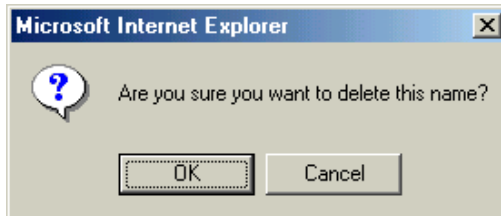
Figure 2-36

4. Click **OK** to confirm the deletion.

   A Delete Name message is displayed.

3

Working With Positions

What You'll Find in This Chapter

This chapter describes Positions. It explains how to create new positions and associate them with Client companies. This chapter also explains how to view position activities, add new activities, and place candidates in permanent and contract positions. Refer to the following table for a description of the sections you will find in this chapter.

Table 3-1 What You'll Find in Chapter 3

If you want to…	Read…
Learn how to create a new position and associate it to a Client Company,	Adding Positions on page 3-2.
Associate keywords to a position that can be used to describe the position and locate it in the database,	Entering Position Keywords on page 3-6.
Change the company with which a position is associated,	Changing Company Associations on page 3-13.
Know to which Rollup Lists the position belongs,	Viewing Position Rollup List Associations on page 3-18.
Generate a report that contains information about the position,	Generating Position Detail Reports on page 3-19.
View position activities, add an activity to a position, or generate a Position Activity Report,	Working with Position Activities on page 3-20.
View, schedule, or change position interviews,	Managing Interviews on page 3-25.
Place a candidate in a permanent or contract position,	Placing Candidates on page 3-39.
Remove a position from the database,	Deleting Positions on page 3-44.

Adding Positions

As mentioned in Chapter 1, positions are usually associated with Client Companies and maintained in the Client database.

When adding a position, all name records associated with the same company are made available to you so you do not have to reenter name and contact information. In addition, once a position is added and saved, it is automatically emailed to recruiters in the organization.
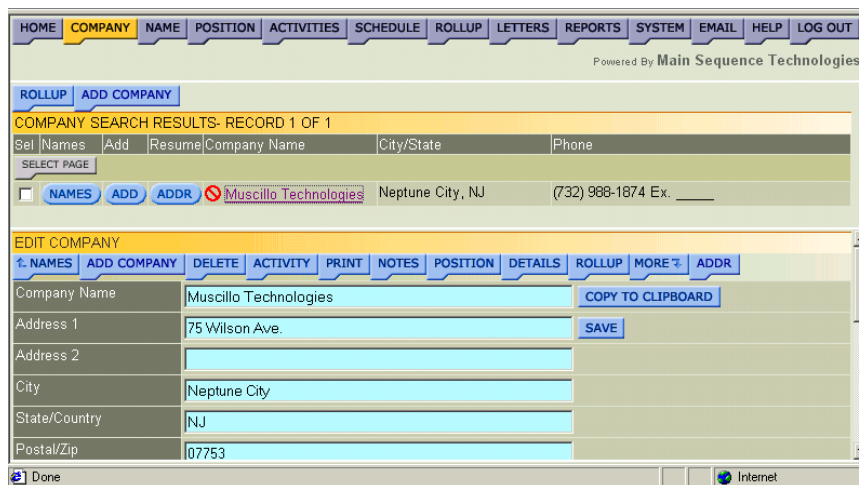
Procedure 3-1   Adding Positions

1. Retrieve the Company to which you want to add a position. Read Chapter 4, Performing Searches for further details.

   The Search Results frame is displayed.

2. Select the company name from the Search Results frame.

   The Edit Company frame is displayed.

Figure 3-1

3. Click the blue **Position** button.

   The Position Search Results frame is displayed.

4. Click the **Add Position** button.

   The Add Position frame is displayed. The company with which the position is associated is displayed in the frame title.
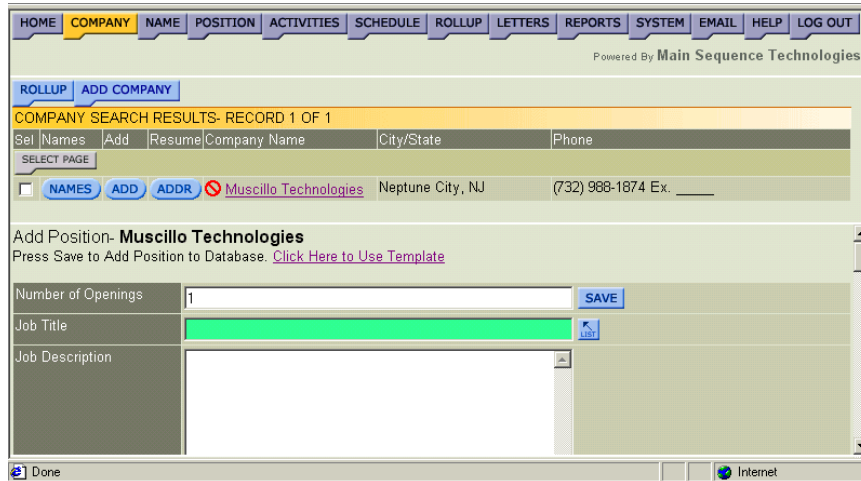
Figure 3-2

5. If necessary, in the provided text box, change the number of openings.

6. In the provided text box, enter the job title or do the following:

   - Click **List** to display the Dropdown List window.
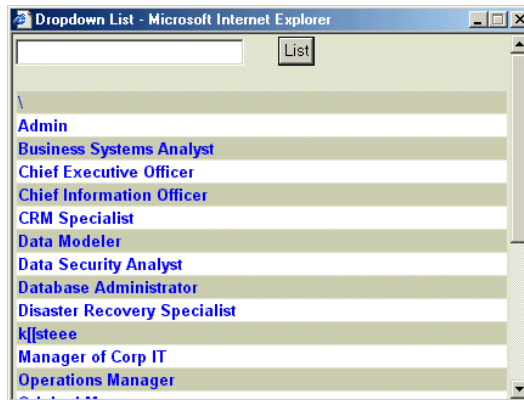
Figure 3-3

   - Click the job title that best describes the position.

     You are returned to the Add Position frame and your selection is displayed in the Job Title text box.

7. In the provided text box, enter the job description.

8. In the provided text box, enter the position's industry/specialty. Do the following:

- Click **List** to display the Dropdown List window.

Figure 3-4

- Click the industry/specialty that best describes the position.

  You are returned to the Add Position frame and your selection is displayed in the Industry/Specialty text box.

9. In the provided text boxes, enter the job type and indicate the degree required for the position.

10. In the provided text boxes, indicate the minimum and maximum years of experience desired.

11. In the provided text boxes, indicate the minimum and maximum salaries available.

   Note: **DO NOT** enter ranges only whole numbers.

12. In the provided text boxes, indicate the city and state in which the position is available.

13. In the provided text box, enter the contact's name. This is usually the hiring manager. To view a list of names associated with the current company, do the following:

- Click **List** to display the Dropdown List window.
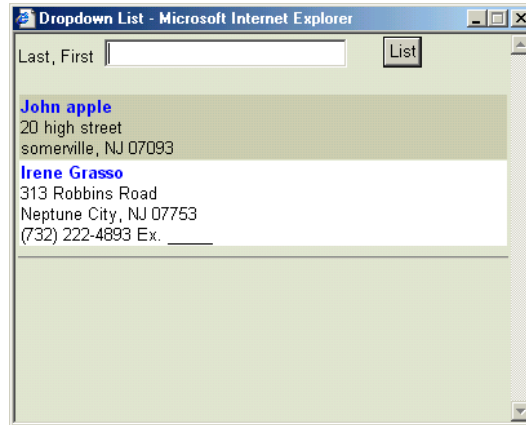
Figure 3-5

- Click the name of the hiring manager/contact.

  You are returned to the Add Position frame and your selection is displayed in the Contact text box. In addition, the contact's telephone number and email address are displayed in the provided text boxes, if available.

14. In the provided text boxes, indicate the contact's department, telephone number, and email address.

15. In the provided text boxes, specify the beginning and ending dates.

16. From the provided list box, indicate the position status. Specify one of the following:

    - **Available**. Select this option if the position is available for staffing.

    - **Filled**. Select this option if the position is closed because it has been staffed.

    - **Internal Only**. Select this option if the position is for internal-use only.

    - **Pending**. Select this option if the position will be available for staffing in the near future.

    - **Not Available**. Select this option if the position is closed.

17. In the provided text box, specify why the position is available.

18. In the provided text box, specify the interview type.

19. In the provided text boxes, indicate whether the position offers vacation, education assistance, health coverage, and other benefits.

20. In the provided text boxes, enter Notes and Web Notes. Do the following:

- In the **Notes** text box, enter notes that are private and shared with colleagues in the company only.

- In the **Web Notes** text box, enter notes that are public and that will be posted on the website.

  Note: The Web Notes feature is not supported in the current version of PCRecruiter.

21. In the provided text boxes, enter the fee percentage, bill rate, pay rate, and guarantee.

   Note: **DO NOT** enter ranges only whole numbers.

22. From the provided list box, indicate whether you want the position advertised on the Internet.

   Note: This feature is not supported in the current version of PCRecruiter.

23. Click **Save**.

   The position is added to the database and the frame is refreshed.

Emailing Job Details

As mentioned earlier in the chapter, positions are emailed to recruiters when they are added and changed within PCRecruiter. In addition, you can manually email job details to other people inside and outside your organization.

Procedure 3-2   Emailing Job Details

1. Retrieve the Position record for whose details you want to email. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed.
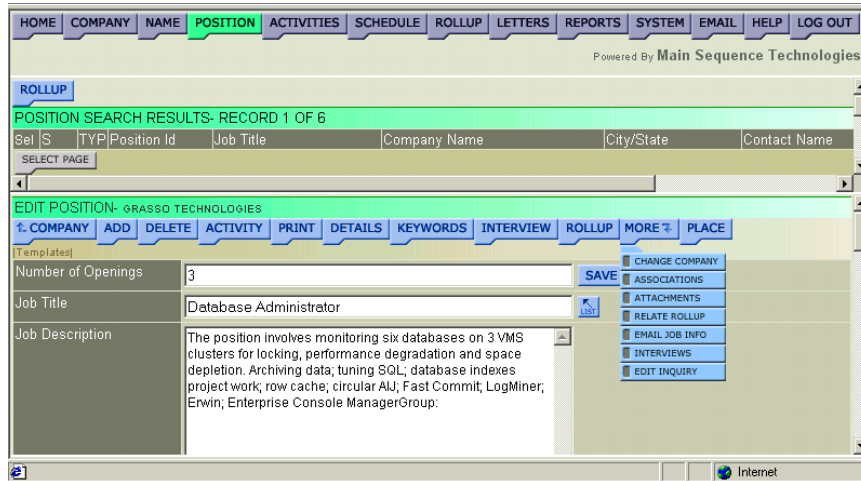
Figure 3-6

3. Choose **More/Email Job Info** (as illustrated in Figure 3-6).

    The Email Position frame is displayed in the Send Email Form window.
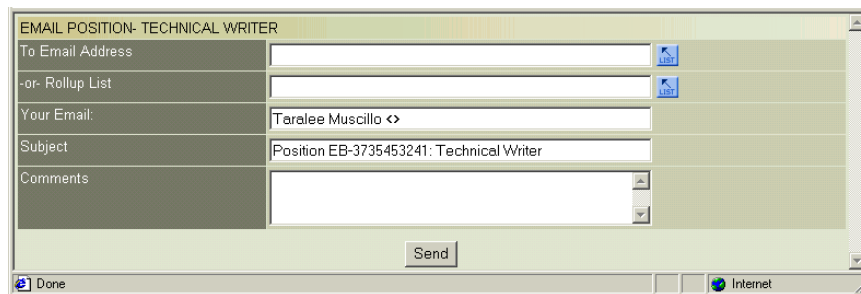
Figure 3-7

4. Do one of the following:

    - If you want to send an email to one person, go to Step 5.

    - If you want to send an email to a Rollup List, go to Step 6.

5. In the provided text box, enter the recipient's name. Do the following:

    - Click the To Email Address **List** button to display the Dropdown List window.

    - Enter the last name or the first few letters of the recipient's last name in the provided text box and click **List**.

    - From the returned matches, click the name of the person to which you want to send the email.

    You are returned to the Email Position frame and your selection is displayed in the To Email Address text box.

6. In the provided text box, enter the Rollup List. Do the following:

- Click the Rollup **List** button to display the Rollup Lists window.

- If desired, click **Show All Rollup Lists**. All Shared Rollup Lists are added to your Rollup Lists.

- From the provided list box, select the name of the Rollup List containing the people to which you want to send the email.

- Click Select List.

   You are returned to the Email Position frame and your selection is displayed in the Rollup List text box.

7. In the provided text box, enter your email address.

8. If desired, type any information you want added to the email.

9. Click **Send**.

   A confirmation message is displayed and a position description similar to the one illustrated below is sent to all specified recipients.
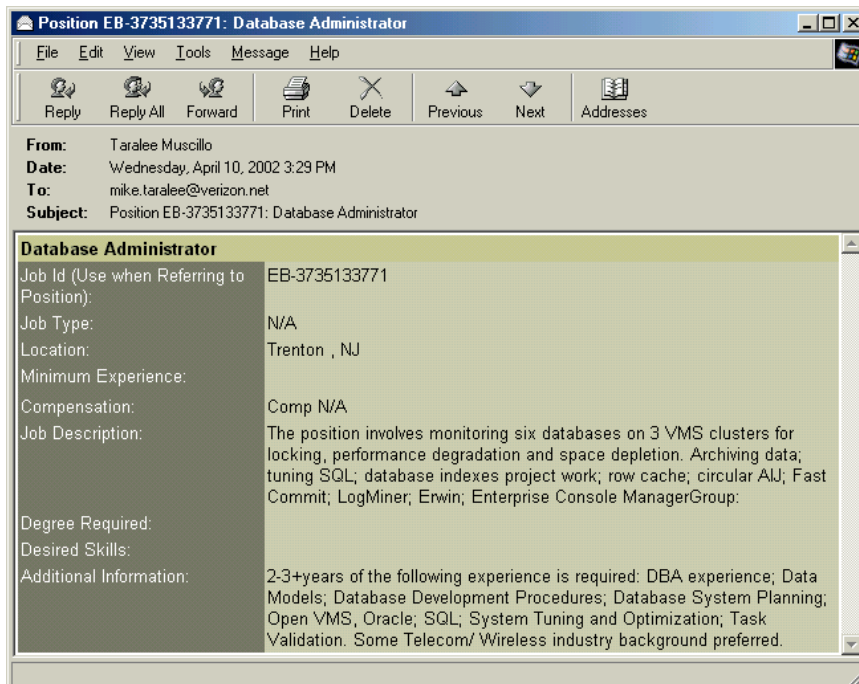
Figure 3-8

Entering Position Keywords

You can use Position keywords to capture additional information about a position that is not contained in other frames or documents. Keywords are searchable; meaning, you can use the Keyword Search utility to search for positions based on the keywords you enter.

Procedure 3-3   Entering Position Keywords

1. Retrieve the Position record for which you want to enter keywords. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Keywords** button.

   The Add/Edit Keywords frame is displayed.
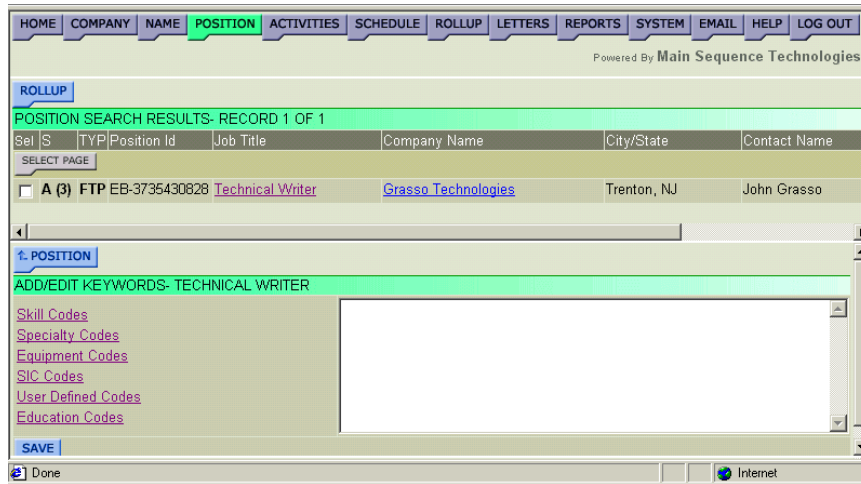
Figure 3-9

4. If you want to use predefined codes, select one of the provided links to display the Dropdown list window.

   For example, click Skill Codes to display the Dropdown list window illustrated below.
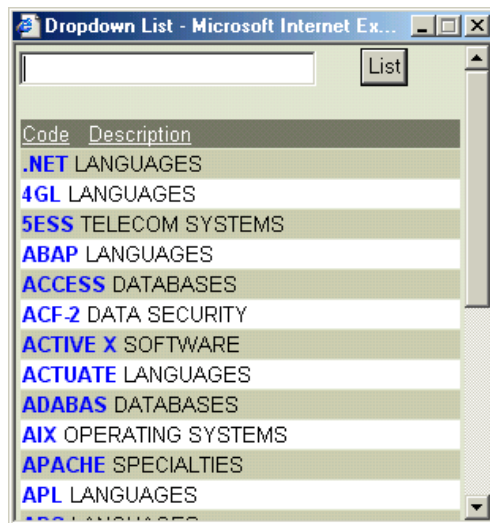
Figure 3-10

5. From the Dropdown list window, do the following:

- Select one or more keywords that describe the person.

  The Keywords are displayed in the provided text box as they are selected.

- Close the window to return to the Add/Edit Keywords frame.

6. If desired, type additional words in the provided text box.

7. Click **Save**.

   A Record Updated message is displayed.

Figure 3-11

8. Do one of the following:

- Click the Return to Position **Back** button to display the Edit Position frame.

- Click the Return to Keywords **Back** button to display the Add/Edit Keywords frame.

Editing Position Information

You can edit information about a Position through the Edit Position frame. In addition, from this frame you can also add activities and keywords, and schedule interviews. Once a position has been modified, it is emailed to the recruiters.

Procedure 3-4   Editing Position Information

1. Retrieve the Position record for which you want to edit information. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the search results frame.

   The Edit Position frame is displayed.

Figure 3-12

3. Make one or more of the following changes:

- In the provided text box, change the number of openings.

- In the provided text box, change the job title.

- In the provided text box, change the job description.

- In the provided text box, change the position's industry/specialty.

- In the provided text boxes, change the job type and the degree required for the position.

- In the provided text boxes, change the minimum and maximum years of experience desired.

- In the provided text boxes, change the minimum and maximum salaries available.

  Note: **DO NOT** enter ranges only whole numbers.

- In the provided text boxes, change the city and state in which the position is available.

- In the provided text box, change the contact's name.

- In the provided text boxes, change the contact's department, telephone number, and email address.

- In the provided text boxes, change the beginning and ending dates.

- From the provided list box, change the position status.

- In the provided text box, change why the position is available.

- In the provided text box, change the interview type.

- In the provided text boxes, indicate whether the position offers vacation, education assistance, health coverage, and other benefits.

- In the provided text boxes, enter Notes and Web Notes. Do the following:

  - In the **Notes** text box, enter notes that are private and shared with colleagues in the company only.

  - In the **Web Notes** text box, enter notes that are public and that will be posted on the website.

    Note: This feature is not supported in the current version of PCRecruiter.

- In the provided text boxes, change the fee percentage, bill rate, pay rate, and guarantee.

  Note: **DO NOT** enter these items in the current version of PCRecruiter.

- From the provided list box, indicate whether you want the position advertised on the Internet.

  Note: This feature is not supported in the current version of PCRecruiter.

4. Click **Save**.

   Your changes are saved and the Edit Position frame is refreshed.

5. If desired, do one or more of the following:

   - Click the blue **Company** button to display the Edit Company frame.

     Read Editing Company Information in Chapter 1 for further details.

   - Click the blue **Add** button to associate another position with the current company.

     Read Adding Positions on page 3-2 for further details.

   - Click the blue **Delete** button to delete the position record.

     ✋ *Only users with Administrative permissions can perform this procedure.*

   - Click the blue **Activity** button to view position activities.

     Read Working with Position Activities on page 3-20 for further details.

- Click the blue **Print** button to generate a Position Detail Report.

  Read Generating Position Detail Reports on page 3-19 for further details.

- Click **Keywords** to add keywords describing the position.

  Read Entering Position Keywords on page 3-8 for further details.

- Click the blue **Interview** button to display the Interview List frame.

  Read Managing Interviews on page 3-25 for further details.

- Click the blue **Rollup** button to add the position to a Rollup List.

  Read Adding Items to Existing Rollup Lists in Chapter 7.

- Click **Rollup**/**On Rollup** to view what Rollup Lists to which the position belongs.

  Read Viewing Position Rollup List Associations on page 3-18 for further details.

- Click the blue **Place** button to place a permanent or contract candidate in the position.

  Read Placing Candidates on page 3-39 for further details.

Changing Company Associations

You can change the company with which a Position is associated. When a Position is moved from one company to another, an activity is created detailing the transaction as illustrated in Figure 3-13.
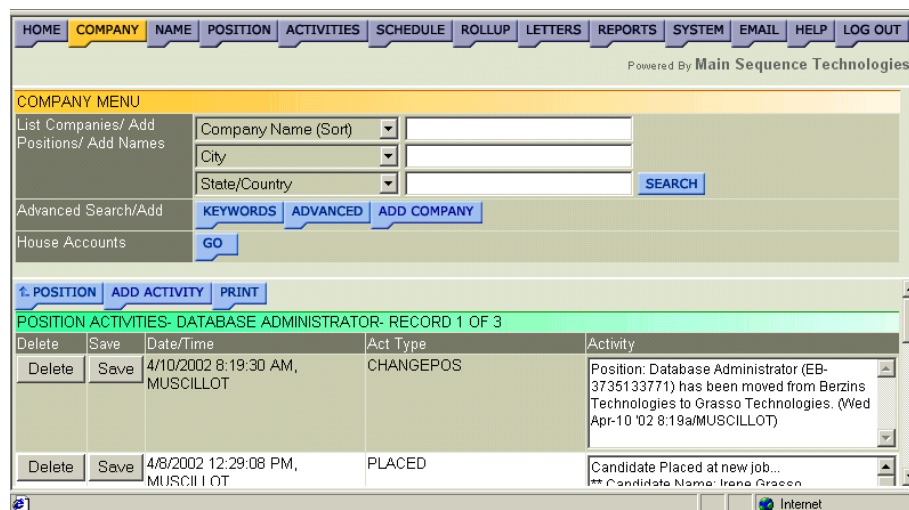
Figure 3-13

For example, in Figure 3-13, the Database Administrator position was moved from Berzins Technologies to Grasso Technologies.

Procedure 3-5   Changing Company Associations

1. Retrieve the Position record for which you want to change company associations. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

    The Edit Position frame is displayed.
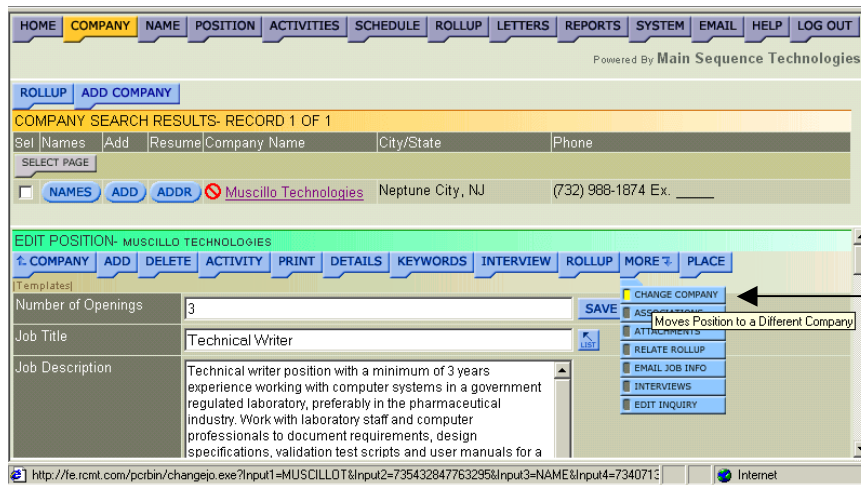
Figure 3-14

3. Choose **More/Change Company** (as illustrated in Figure 3-14).

    The Change Company frame is displayed.
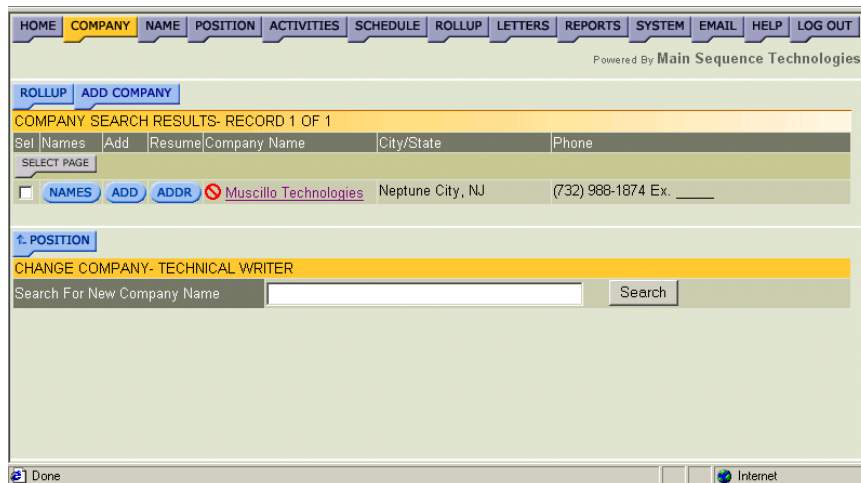
Figure 3-15

4. In the Search For New Company text box, type the name or the first few characters of the company to which you want to associate the current Position and click **Search**.

    A list of companies matching your criteria is displayed.
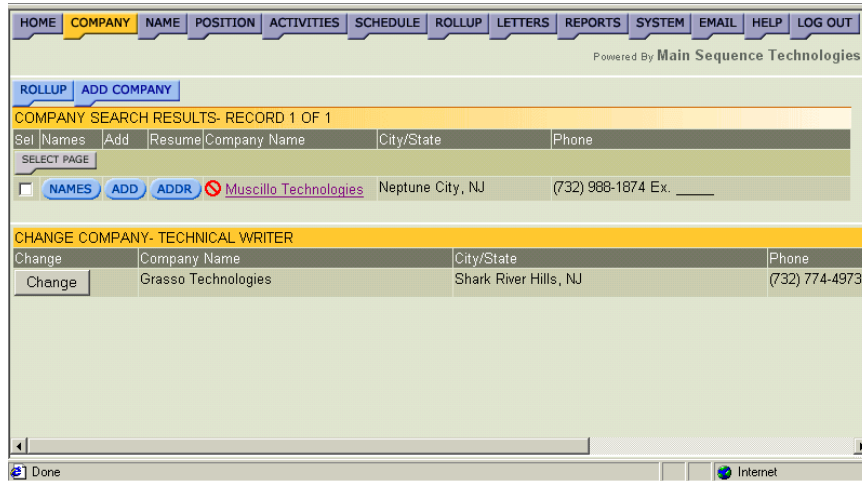
Figure 3-16

5. Click the **Change** button corresponding to the company with which you want to associate the current name.

    The name is associated to the selected company and a confirmation message is displayed.
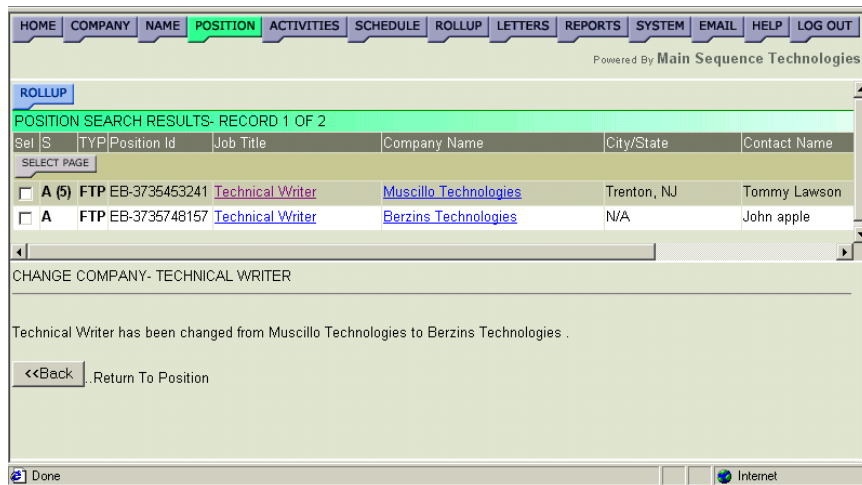
Figure 3-17

6. Click the Return to Position **Back** button to display the Edit Position frame.

Relating Rollups

You can relate positions to Rollup Lists. This is helpful when you have a Rollup List containing candidates with the same qualifications as those required by the position.

Procedure 3-6   Relating Rollups

1. Retrieve the Position record to which you want to relate Rollup Lists. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.
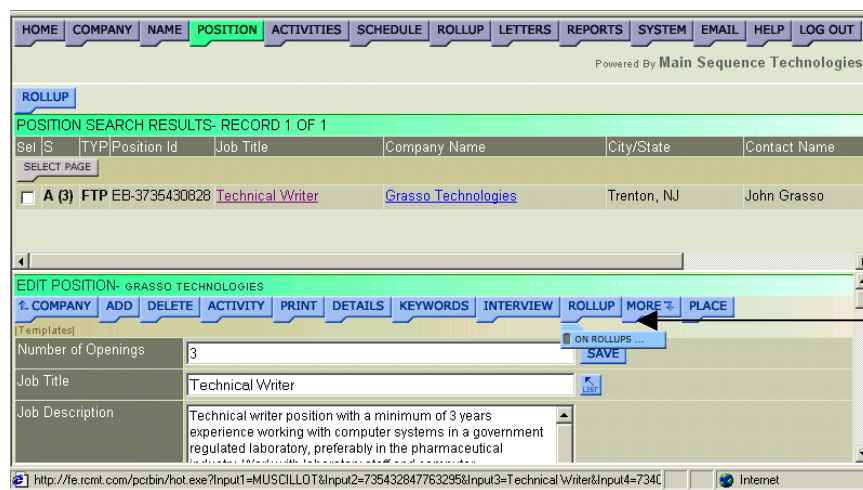
    The Edit Position frame is displayed.
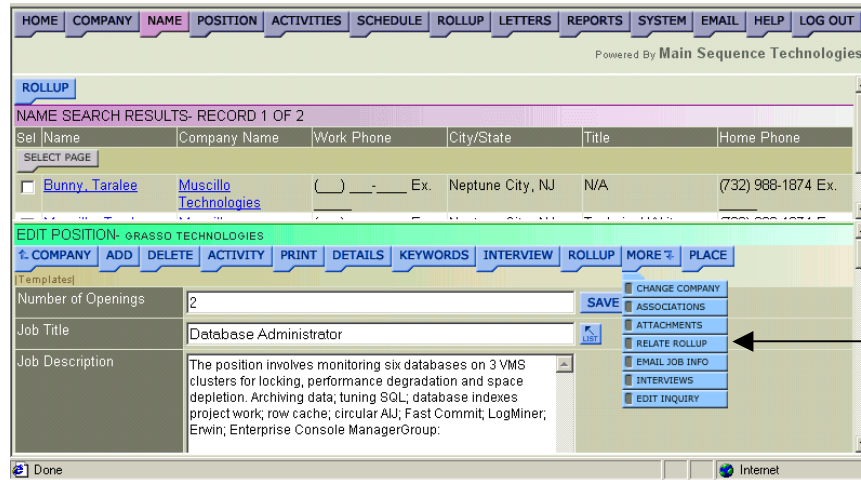
Figure 3-18

3. Choose **More/Relate Rollup** (as illustrated in Figure 3-18).

    The Rollup Lists frame is displayed.

4. Click **Add.**

    The Associate Rollup List with Position frame is displayed.
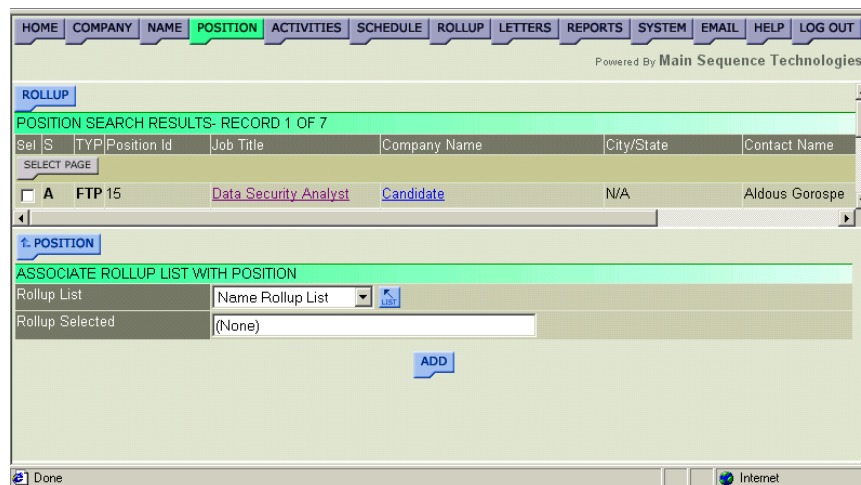
Figure 3-19

5. Click the Rollup **List** button.

   The Limit to Rollup List frame is displayed in the Rollup Lists window.
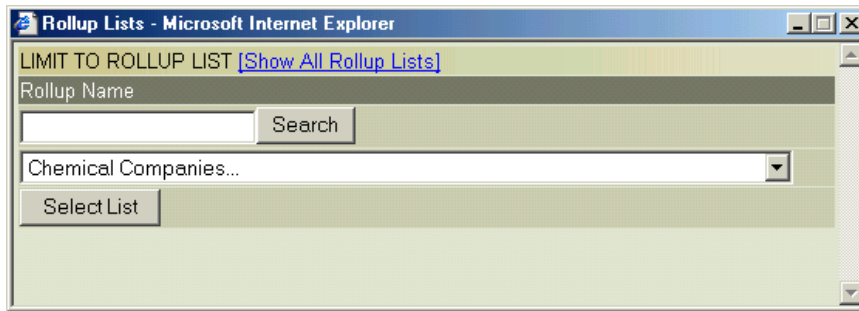
Figure 3-20

6. Do one of the following:

   - If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

     All Shared Rollup Lists are added to your Rollup Lists.

   - If the Rollup List you want to view is displayed in the provided list box, go to Step 7.

7. From the provided list box, select the name of the Rollup List with which you want to associate the position.

8. Click **Select List**.

   You are returned to the Associate Rollup List with Position frame and the Rollup List you selected is displayed in the Rollup Selected text box.

9. Click **Add**.

   The Rollup Lists frame is displayed and the selected Rollup is listed.
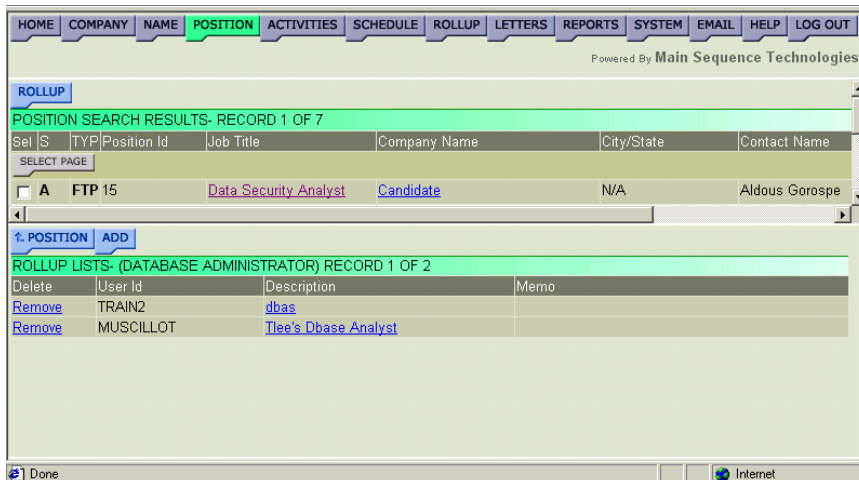
Figure 3-21

Viewing Position Rollup List Associations

As is discussed in a later chapter, you can create Rollup Lists to which you can add companies, names, and positions.

Procedure 3-7   Viewing Position Rollup List Associations

1. Retrieve the Position record for which you want to view Rollup List associations. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

    The Edit Position frame is displayed.

Figure 3-22

3. Choose **Rollup/On Rollups**.

    The Rollup Membership frame is displayed.
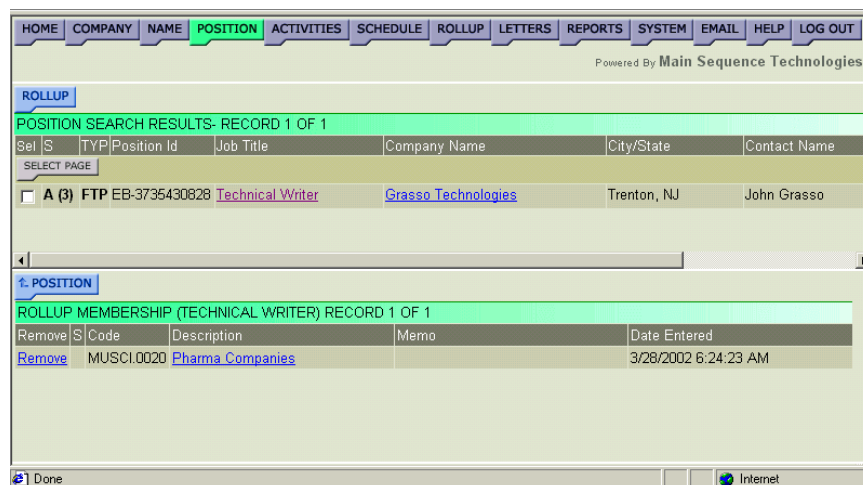
Figure 3-23

4. If desired, do one or more of the following:

- To delete the position from a Rollup List, click the corresponding **Remove** link.

- To return to the previous frame, click the blue **Position** button.

- To view all the positions in a Rollup List, click the name of the Rollup List whose positions you want to view.

  The Rollup List frame is launched in a new browser window.

Generating Position Detail Reports

You can generate a quick Position Detail Report. When you generate the report, it is opened in a new browser window. From the new browser window you can print the report to your network printer or save it to your local or network drive.

Note: PCRecruiter contains a complete reporting tool. To learn more, read Chapter 8, Generating Reports.

Procedure 3-8   Generating Position Detail Reports

1. Retrieve the Position record for which you want to generate a report. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Print** button to generate the report.

   The Position Detail Report is launched in a new browser window.

4/8/2002	POSITION DETAIL REPORT		User Name: M
Job Title	Technical Writer	Position Id	EB-3735430828
Job Type	FTP	Grad Year	Trenton
Company Name	Grasso Technologies	State/Country	NJ
Address 1	313 Robbins Road	Industry	Pharmaceutical
Address 2		Specialty	Business Intel
City/St/Zip	Shark River Hills, NJ 07753	Degree Required	BA/BS
Phone	(732) 774-4973 Ex. _____	Begin Date	
Fax	(___) ___-____ Ex. _____	End Date	7/1/2001
Date Posted	4/8/2002 7:23:56 AM	Bill Rate	$44.00
User Name	MUSCILLOT	Pay Rate	$44.00
Contact Name	John Grasso	Why Open	Temp

Figure 3-24

4. If desired, do one or both of the following:

    - Choose **File/Save** from the new browser window to save the report.

    - Choose **File/Print** from the new browser window to print the report.

Working with Position Activities

You can add activities to companies, names, and positions. However, when adding activities to names and positions, you also have the option of copying the activity to the company with which the name or position is associated.

You can view Position activities from the Position Activities frame. In addition, you can add new activities and generate a Position activity report. Refer to the following sections for complete details:

- Viewing Position Activities on page 3-20.

- Adding Position Activities on page 3-21.

- Generating Position Activity Reports on page 3-24.

Viewing Position Activities

You can view all activities associated with a position.

Procedure 3-9   Viewing Position Activities

1. Retrieve the Position record for which you want to view activities. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

    The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Activity** button.

    The Position Activities frame is displayed. All activities associated with the current position are displayed.
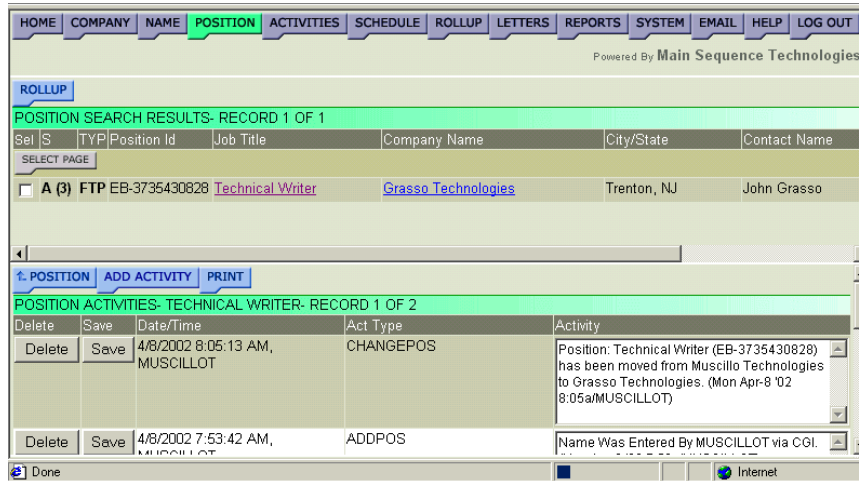
Figure 3-25

4. If desired, do one or more of the following:

    -   Click the corresponding **Delete** button to delete an activity.

        ⚡ *Only users with Administrative permissions can perform this task.*

    -   In the Activity text box, make changes to the activity description and click the corresponding **Save** button.

        ⚡ *Only users with Administrative permissions can perform this task.*

    -   Click the blue **Position** button to return to the Edit Position frame.

    -   Click the blue **Add Activity** button to create a new activity.

        Read Adding Position Activities on page 3-21 for further details.

    -   Click the blue **Print** button to generate an Activity Report.

        Read Generating Position Activity Reports on page 3-24 for further details.

Adding Position Activities

You can add position activities through the Add New Position Activity window. When adding a new activity, you can indicate whether you want to add it to the Schedule, copy it to the parent company, or configure a reminder alarm.

Note: Once you add an activity, you cannot edit or delete it.

Activities are different than notes. *Activities* are used to track events such as telephone calls and messages, candidate presentations, and client visits. *Notes* are used for information that is not likely to change and that cannot be added on another frame such as unique skills and attributes or past history.

Procedure 3-10 Adding Position Activities

1. Retrieve the Position record for which you want to add an activity. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed.
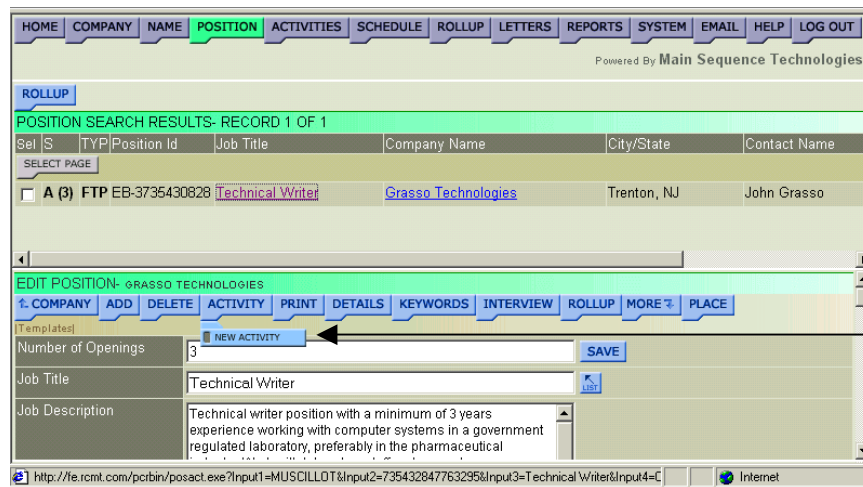
Figure 3-26

3. Choose **Activity/New Activity** (as illustrated in Figure 3-26).

   The Add New Position Activity window is displayed. The current date and time are displayed in the Date and Time text box.
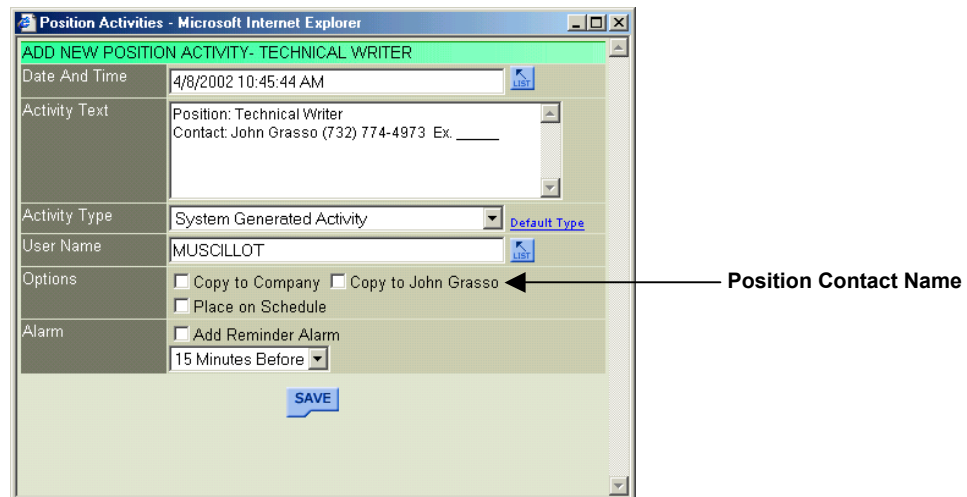
Figure 3-27

4. If you want to change the date and time, do the following:

- Click the Date and Time **List** button to display the Select Date and Time window.

Figure 3-28

- Use the provided controls to set a new date and time and click **OK**.

You are returned to the Add New Position Activity window and your selections are displayed in the Date and Time text box.

5. If desired, in the Activity Text box, enter details about the new activity.

6. From the Activity Type list box, select the type that best describes the activity.

> **Tip:** By default, System Generated Activity is displayed in the Activity Type list box. To change the default activity, select the **Default Type** link to display the Select Default Activity Type window, choose a different type from the provided list box, and click **Save** to return to the previous window.

7. Select the provided check box if you want to copy the current activity to the company with which the name is associated.

8. Select the provided check box if you want to copy the current activity to the position's contact (For example, in Figure 3-27, John Grasso).

9. Select the provided check box if you want to display the current activity on the Schedule.

> **Note:** To learn more about the Schedule Feature, read Chapter 6.

10. Configure Alarm options; do the following:

- Select the Add Reminder Alarm check box.

- From the provided list, indicate when the alarm should be generated (options range from 15 minutes to 3 days).

11. Click **Save**.

The activity is saved and you are returned to the previous frame. You can view this activity from several frames within PCRecruiter including the Position Activities frame; read Viewing Position Activities on page 3-20for more details.

Generating Position Activity Reports

You can print a Position Activity Report from the Position Activities frame. When you print the report, it is opened in a new browser window. From the new browser window, you can print the report to your network printer or save it to your local or network drive.

Note: PCRecruiter contains a complete reporting tool. To learn more, read Chapter 8, Generating Reports.

Procedure 3-11   Generating Position Activity Reports

1. Retrieve the Position record for which you want to generate a report. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Activity** button.

The Position Activities frame is displayed. All activities associated with the current person are displayed.
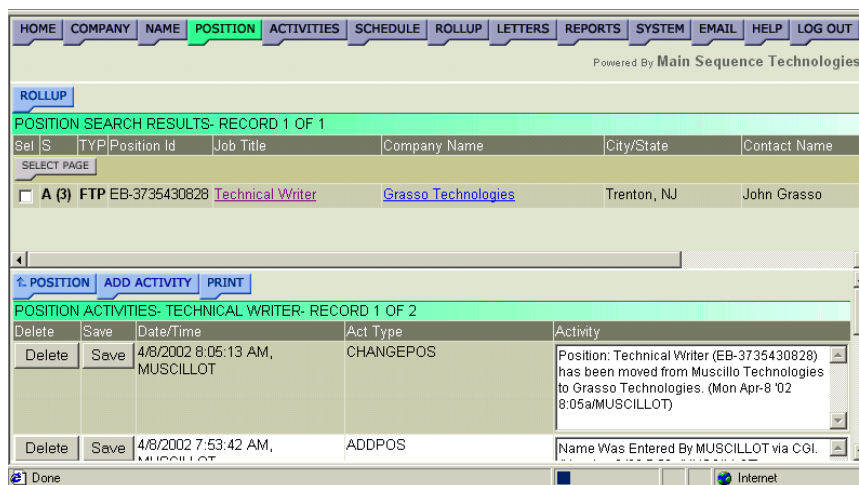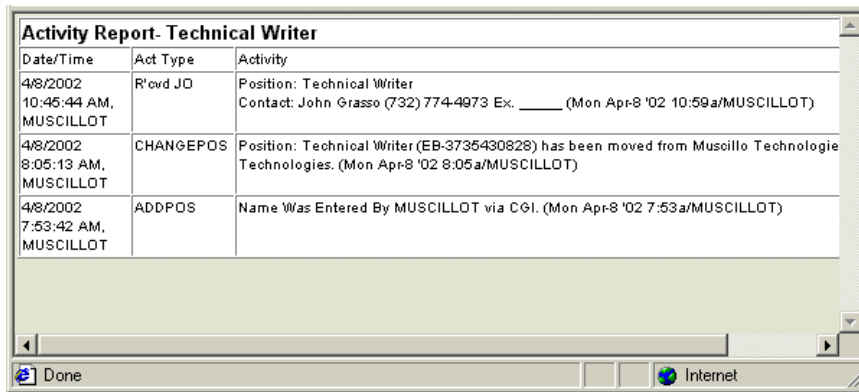
Figure 3-29

4. Click the blue **Print** button to generate an Activity Report.

The Position Activity Report is launched in a new browser window.

Activity Report- Technical Writer		
Date/Time	Act Type	Activity
4/8/2002 10:45:44 AM, MUSCILLOT	R'cvd JO	Position: Technical Writer Contact: John Grasso (732) 774-4973 Ex. _____ (Mon Apr-8 '02 10:59a/MUSCILLOT)
4/8/2002 8:05:13 AM, MUSCILLOT	CHANGEPOS	Position: Technical Writer (EB-3735430828) has been moved from Muscillo Technologie Technologies. (Mon Apr-8 '02 8:05a/MUSCILLOT)
4/8/2002 7:53:42 AM, MUSCILLOT	ADDPOS	Name Was Entered By MUSCILLOT via CGI. (Mon Apr-8 '02 7:53a/MUSCILLOT)

Figure 3-30

5. If desired, do one or both of the following:

- Choose **File/Save** from the new browser window to save the report.

- Choose **File/Print** from the new browser window to print the report.

Managing Interviews

Interviews are associated with Positions. You can view position interviews, set up new interviews, change existing interviews, email interview confirmations, and delete interviews. Read the following sections for further details:

- Viewing Interviews on page 3-26.

- Scheduling a Candidate Interview on page 3-27.

- Scheduling a Group Interview on page 3-30.

- Changing Interviews on page 3-34.

- Emailing Interview Confirmations on page 3-35.

- Deleting Interviews on page 3-38.

Viewing Interviews

You can view interviews set up for a specific position from the Interview List frame.

Procedure 3-12   Viewing Interviews

1. Retrieve the Position record for which you want view interviews. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Interview** button.

   The Interview List frame is displayed.
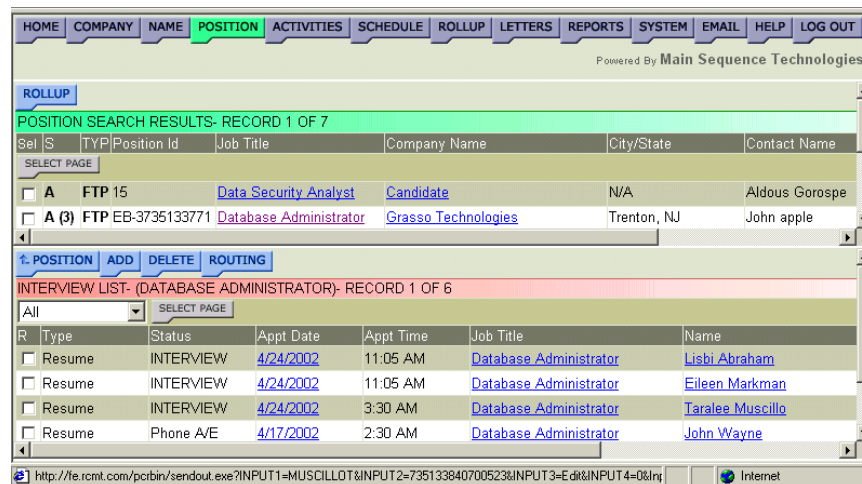
Figure 3-31

4. If desired, do one of the following:

   • Click the blue **Position** button to display the Edit Position frame.

     Read Editing Position Information on page 3-10 for further details.

   • Click the blue **Add** button to display the Add One Interview and Add Interview Group frames.

     Read Managing Interviews on page 3-25 for further details.

   • Click the blue **Delete** button to delete the interview.

     Read Deleting Positions on page 3-44 for further details.

     ✍ *Only users with Administrative permissions can perform this procedure.*

Scheduling a Candidate Interview

Candidate interviews are scheduled from the Add One Interview frame. When setting up the interview, you have the option of adding it to the Schedule. If you want to schedule a group interview, perform Procedure 3-14, Scheduling a Group Interview on page 3-30.

Procedure 3-13   Scheduling a Candidate Interview

1. Retrieve the Position record for which you want schedule an interview. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed.
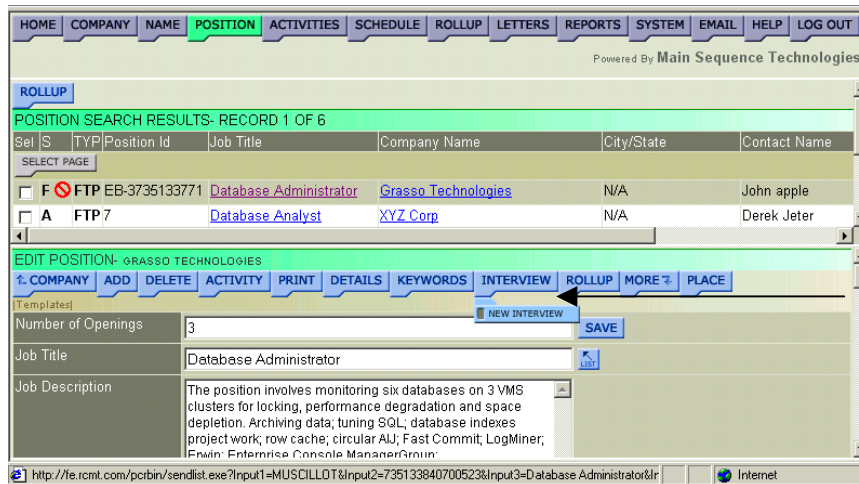
Figure 3-32

3. Choose **Interview/New Interview** (as illustrated in Figure 3-32).

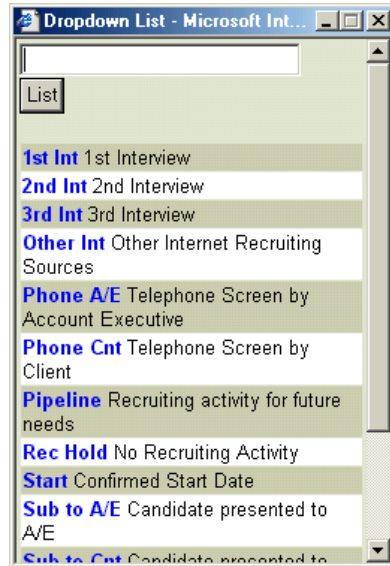   The Add One Interview frame is displayed.
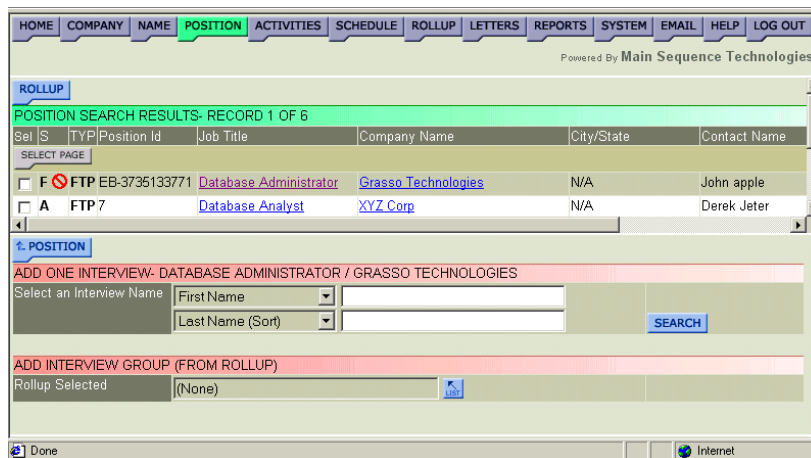
Figure 3-33

4. Define your search criteria. Do the following:

    Using the provided list boxes, select your search criteria.

    In the corresponding text boxes, type the search criteria values.

5. Click **Search**.

    A list of names matching your criteria is displayed.

6. Select the candidate for which you want to set up an interview.

    The Add Interview frame is displayed.

7. To schedule the interview, do the following:

    - Click the Appointment Date **List** button to display the Select Date and Time window.

Figure 3-34

    - Use the provided controls to set the follow-up date and time and click **OK**.

    You are returned to the Add Interview frame and your selections are displayed in the Appointment Date and Appointment Time text boxes.

8. To specify when the interview was arranged, do the following:

    - Click the Arranged Date **List** button to display the Select Date and Time window (Figure 3-35).

    - Use the provided controls to set the follow-up date and time and click **OK**.

    You are returned to the Add Interview frame and your selections are displayed in the Arranged Date and Arranged Time text boxes.

9. From the provided list box, indicate the type of interview.

10. To specify the interview status, do the following:

- Click the Status **List** button to display the Dropdown List window.
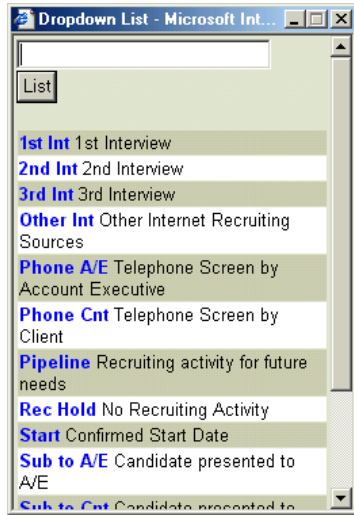
Figure 3-35

- Click the status that best describes the interview.

You are returned to the Add Interview frame and your selection is displayed in the Status text box.

11. In the provided fields, enter the bill rate and pay rate.

Note: DO NOT enter ranges only whole numbers.

12. In the Feedback text box, type any feedback received from the client or candidate.

13. In the provided text box, enter the guarantee details.

14. In the provided text box, enter any interview-related notes.

15. Using the provided list box, indicate whether the interview should be placed on the schedule.

16. To schedule a follow-up, do the following:

- Click the Schedule Follow-up **List** button to display the Select Date and Time window (Figure 3-35).

- Use the provided controls to set the follow-up date and time and click **OK**.

You are returned to the Add Interview frame and your selections are displayed in the Schedule Follow-up text box.

17. Click **Save**.

The interview information is saved and the Edit Interview frame is displayed.

Scheduling a Group Interview

Using a predefined Rollup List, you can schedule a group interview. By using Rollup Lists to schedule group interviews you save time by scheduling the interview once rather than multiple times.

To learn more about Rollup Lists, read Chapter 7, Working With Rollup Lists. If you want to schedule a single interview, perform Procedure 3-13, Scheduling a Candidate Interview on page 3-27.

Procedure 3-14   Scheduling a Group Interview

1. Retrieve the Position record for which you want schedule a group interview. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

The Edit Position frame is displayed.
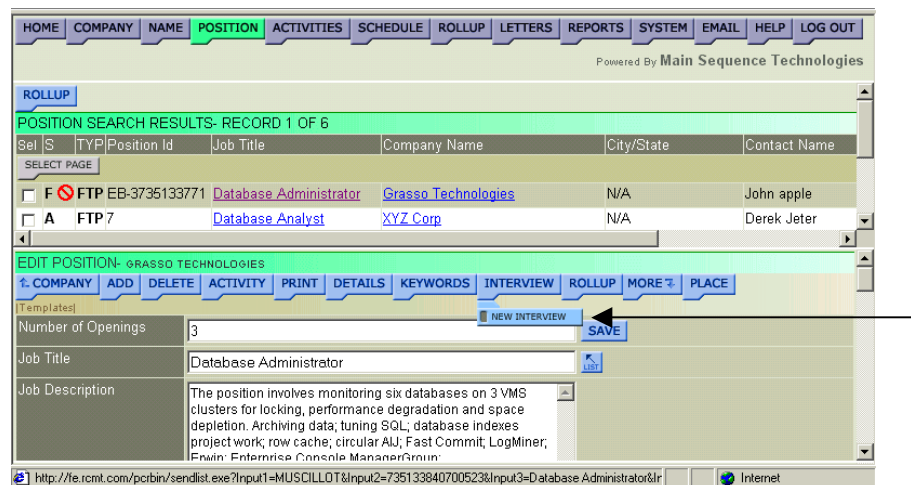
Figure 3-36

3. Choose **Interview/New Interview** (as illustrated in Figure 3-36).

The Add Interview Group frame is displayed.
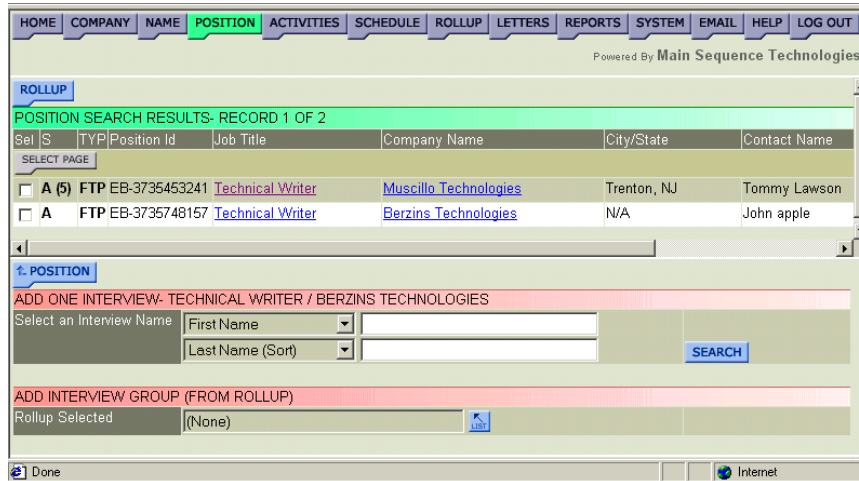
Figure 3-37

4. Click the Rollup Selected **List** button.

   The Rollup Lists window is displayed.

5. Do one of the following:

   - If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

     All Shared Rollup Lists are added to your Rollup Lists.

   - If the Rollup List you want to view is displayed in the provided list box, go to Step 6.

6. From the provided list box, select the name of the Rollup List containing the people for which you want to set up a group interview.

7. Click **Select List**.

   You are returned to the Add Interview Group frame and the Rollup List you selected is displayed in the Rollup Selected field.

8. Click **Add**.

   The Add Interview frame is displayed.

9. To schedule the interview, do the following:

- Click the Appointment Date **List** button to display the Select Date and Time window.
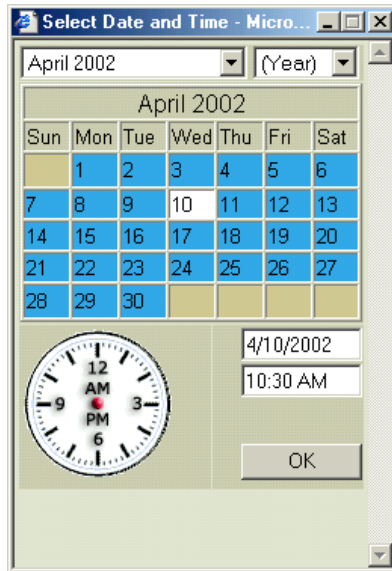
Figure 3-38

- Use the provided controls to set the follow-up date and time and click **OK**.

    You are returned to the Add Interview frame and your selections are displayed in the Appointment Date and Appointment Time text boxes.

10. To specify when the interview was arranged, do the following:

- Click the Arranged Date **List** button to display the Select Date and Time window (Figure 3-35).

- Use the provided controls to set the follow-up date and time and click **OK**.

    You are returned to the Add Interview frame and your selections are displayed in the Arranged Date and Arranged Time text boxes.

11. From the provided list box, indicate the type of interview.

12. To specify the interview status, do the following:

- Click the Status **List** button to display the Dropdown List window.

Figure 3-39

- Click the status that best describes the interview.

    You are returned to the Add Interview frame and your selection is displayed in the Status text box.

13. In the provided fields, enter the bill rate and pay rate.

    Note: **DO NOT** enter ranges only whole numbers.

14. In the Feedback text box, type any feedback received from the client or candidate.

15. In the provided text box, enter the guarantee details.

16. In the provided text box, enter any interview-related notes.

17. Using the provided list box, indicate whether the interview should be placed on the schedule.

18. To schedule a follow-up, do the following:

    - Click the Schedule Follow-up **List** button to display the Select Date and Time window (Figure 3-35).

    - Use the provided controls to set the follow-up date and time and click **OK**.

        You are returned to the Add Interview frame and your selections are displayed in the Schedule Follow-up text box.

19. Click **Save**.

    The interview information is saved and the Edit Interview frame is displayed.

Changing Interviews

You can change the details of an interview from the Edit Interview frame. If you want to change the details of an interview that has been copied to the schedule, you must perform the Editing Schedule Activities procedure in Chapter 6 in addition to the following procedure.

Procedure 3-15 Changing Interviews

1. Retrieve the Position record for whose interview you want to change. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Interview** button.

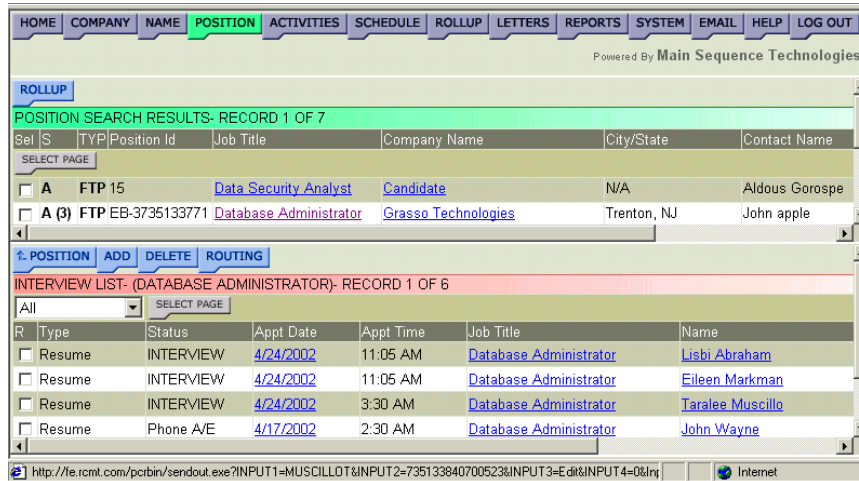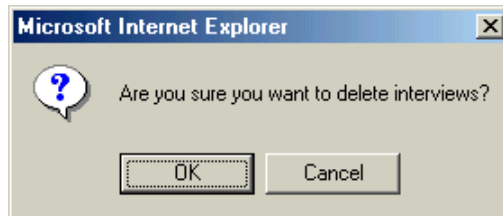   The Interview List frame is displayed.
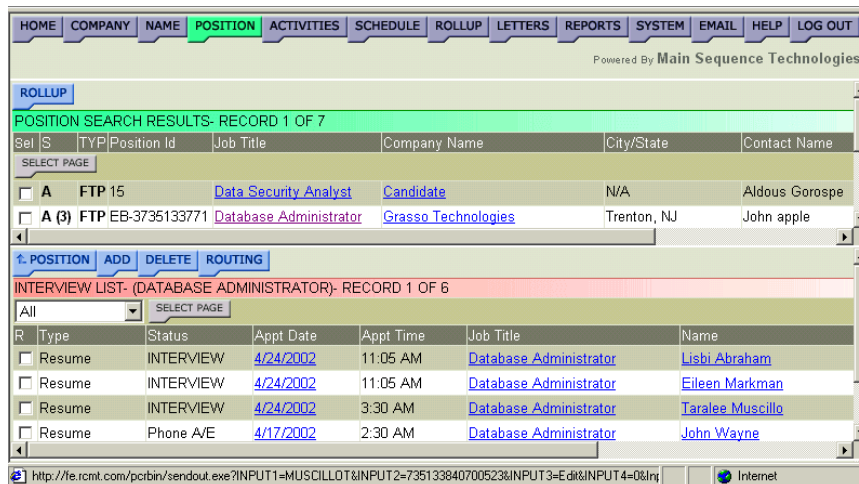
Figure 3-40

4. Click the **Appt Date** link corresponding to the interview you want to edit.

   The Edit Interview frame is displayed.

5. If desired, do one or more of the following:

   - In the provided text boxes, change the appointment date and times.

   - In the provided text boxes, change the date and time the interview was arranged.

   - Using the provided list box, indicate the type of interview.

   - In the provided text box, change the interview status.

- In the provided text boxes, change the bill rate and pay rate.

  Note: DO NOT enter ranges only whole numbers.

- In the provided text box, enter any feedback received from the client or candidate.

- In the provided text box, enter the guarantee details.

- In the provided text box, enter any notes regarding the interview.

6. Click **Save**.

   Your changes are saved and the Edit Interview frame is refreshed.

7. If desired, do one or more of the following:

   - Click the blue **Position** button to display the Edit Position frame.

     Read Editing Position Information on page 3-10 for further details.

   - Click the blue **Add** button to display the Add One Interview and Add Interview Group frames.

     Read Managing Interviews on page 3-25 for further details.

   - Click the blue **Delete** button to delete the interview.

     Read Deleting Positions on page 3-44 for further details.

     ⚡ *Only users with Administrative permissions can perform this procedure.*

   - Click the blue **Email** button to display the Send Email Form window.

     Read Emailing Interview Confirmations on page 3-35 for further details.

Emailing Interview Confirmations

You can email Interview confirmations to the interview participants as well as any one else interested in the details. When composing the email, you have the option to add candidate resumes, notes, and summaries, as well as other documents not maintained within the PCRecruiter databases.

Procedure 3-16   Emailing Interview Confirmations

1. Retrieve the Position record whose interview details you want to email. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Interview** button.

The Interview List frame is displayed.
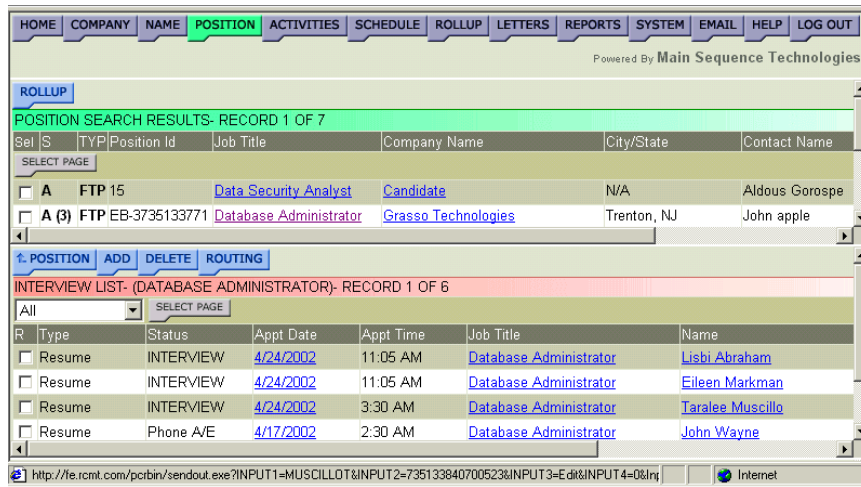
Figure 3-41

4. Click the **Appt Date** link corresponding to the interview for which you want to send an email.

The Edit Interview frame is displayed.
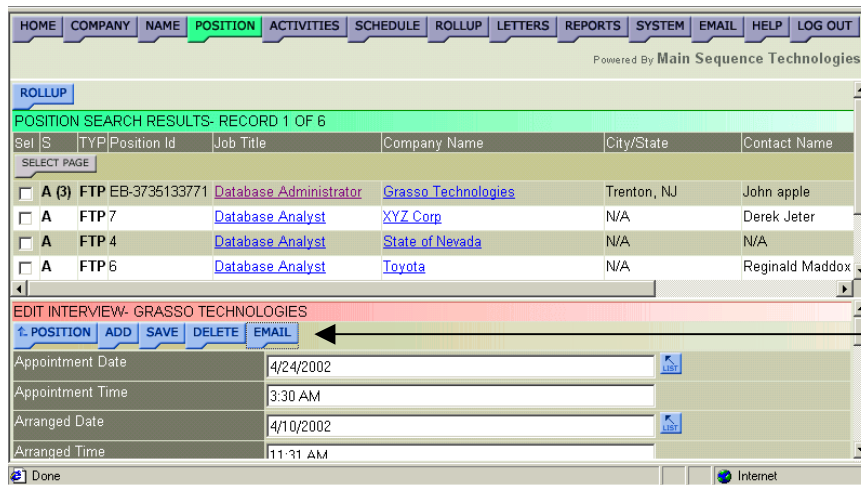
Figure 3-42

5. Click the blue **Email** button.

The Email Interview frame is displayed in the Send Email Form window.
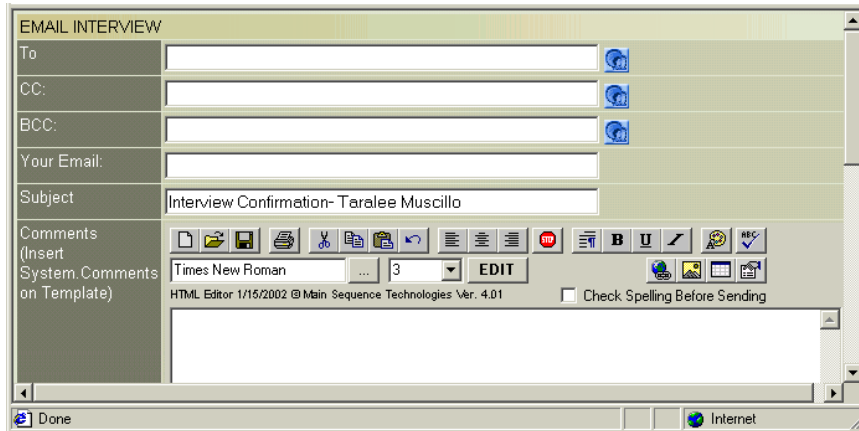
Figure 3-43

6. Specify the email recipients in the To, CC, and BCC text boxes.

7. In the provided text box, enter your email address.

8. If desired, in the provided text box, change the subject of the email.

9. If desired, add attachments to the email. Do the following:

   - Click **Add** to display the Open dialog box.

   - Using the controls, locate the file you want to attach to the email and click **Open**.

   You are returned to the Email Interview frame and the path and file name you selected are displayed in the File Attachments group box.

10. Select the corresponding check boxes if you want to include the candidate resume, notes, and/or summary.

11. Select the corresponding check boxes if you want to send a copy of the email to the candidate or primary contact.

12. Click **Send**.

   A confirmation message is displayed and an interview confirmation email similar to the one illustrated below is sent to all specified recipients.
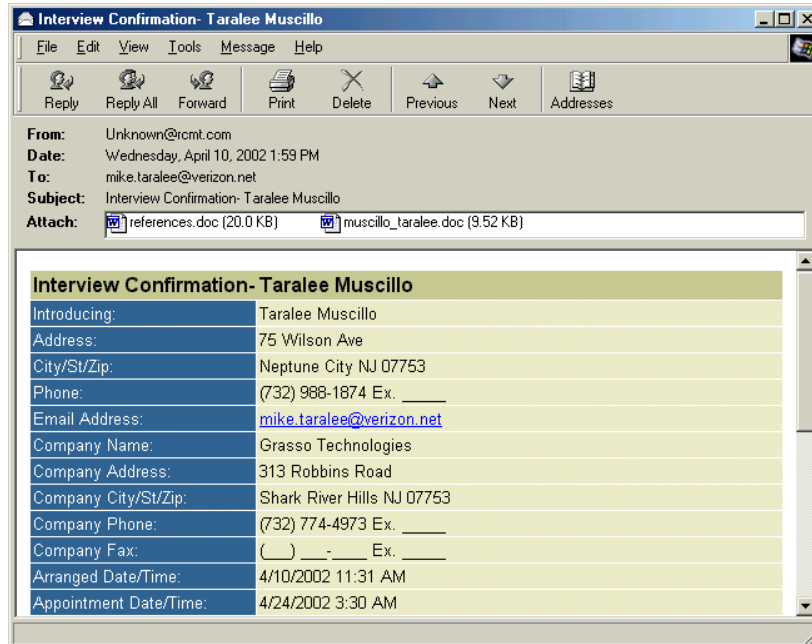
Figure 3-44

Deleting Interviews

You can delete Interviews that were added in error or that are no longer scheduled.

✍ *Only users with Administrative permissions can perform this procedure.*

Procedure 3-17   Deleting Interviews

1. Retrieve the Position record whose interviews you want to delete. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Interview** button.

   The Interview List frame is displayed.

Figure 3-45

4. Select the corresponding check boxes of the interviews you want to delete.

5. Click the blue **Delete** button.

    A confirmation prompt is displayed.

6. Click **OK** to confirm the deletion.

    The Interview List frame is refreshed and the selected interview is no longer listed.

Placing Candidates

There are two types of candidates that can fill a position: permanent employees and contractors. Read the following sections for further information:

- Placing a Permanent Employee on page 3-40.

- Placing a Contract Employee on page 3-42.

Placing a Permanent Employee

When placing a permanent employee, you must know the starting salary and the placement fee.

Procedure 3-18   Placing a Permanent Employee

1. Retrieve the Position record for which you want place a candidate. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

    The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Place** button.

    The Placements frame is displayed. This frame may be empty as illustrated in the following figure.
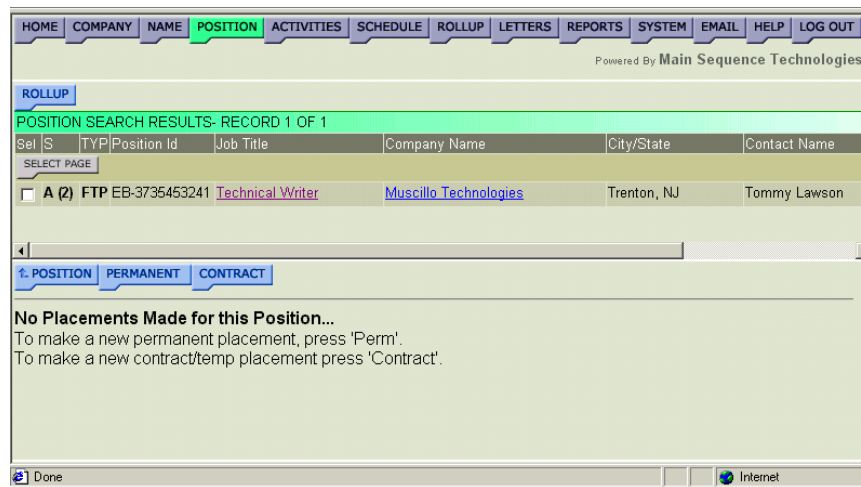
Figure 3-46

4. Click the blue **Permanent** button.

    The Add Permanent Placement frame is displayed.
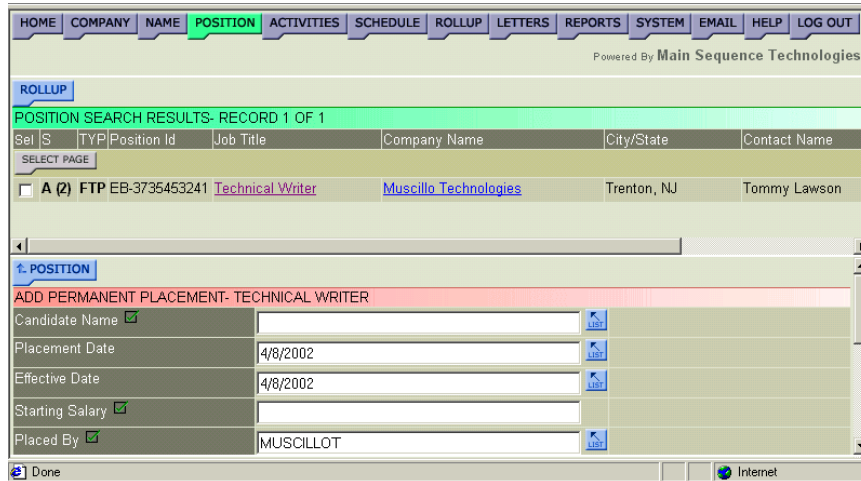
Figure 3-47

5. In the provided text box, specify the candidate name.

6. In the provided text boxes, specify the placement and effective dates.

7. In the provided text box, specify the starting salary.

   Note: **DO NOT** enter ranges only whole numbers.

8. In the provided text boxes, enter the placement fee and fee percentage.

9. In the provided text boxes, indicate the bill rate and pay rate.

   Note: **DO NOT** enter ranges only whole numbers.

10. In the provided text box, enter the guarantee details.

11. Click **Place**.

    The Placement frame is displayed and the candidate is listed.
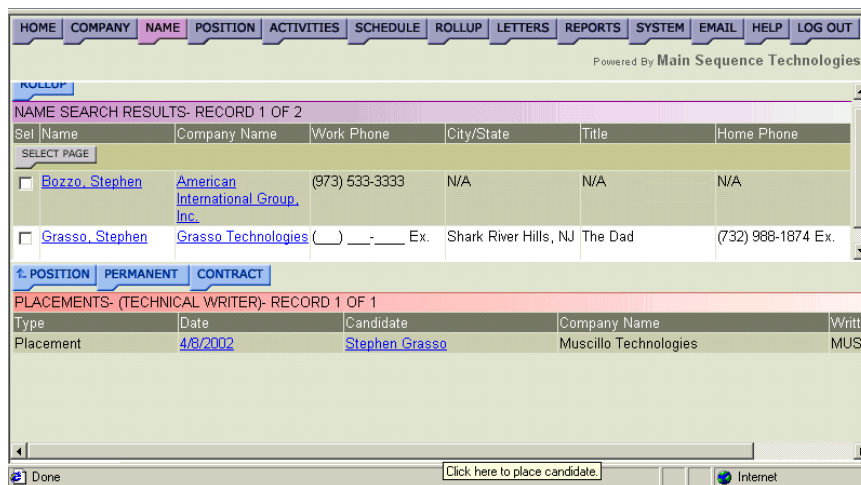
Figure 3-48

Placing a Contract Employee

When placing a contract or temporary employee, you must know the starting date, ending date, bill rate, and pay rate.

Procedure 3-19   Placing a Contract Employee

1. Retrieve the Position record for which you want place a candidate. Read Chapter 4, Performing Searches for complete details.

2. Select the desired Position from the Search Results frame.

   The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Place** button.

   The Placements frame is displayed. This frame may be empty as illustrated in the following figure.
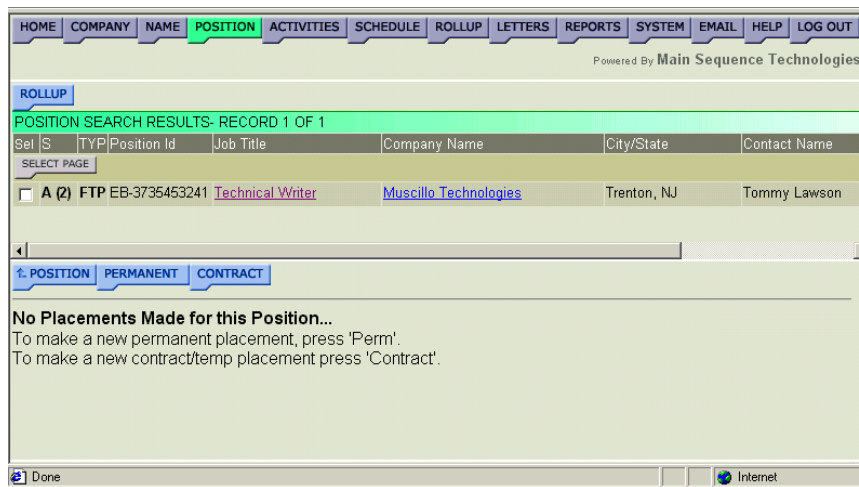
Figure 3-49

4. Click the blue **Contract** button.

   The Add Contract/Temp Placement frame is displayed.
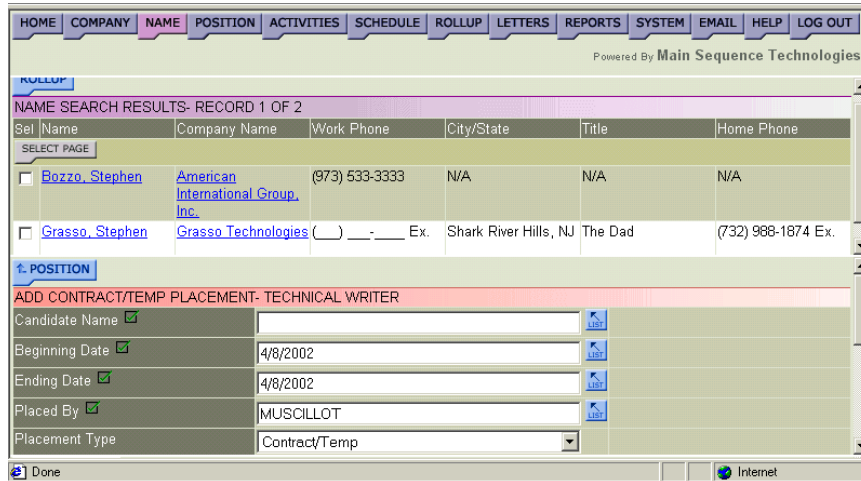
Figure 3-50

5. In the provided text box, specify the candidate name.

6. In the provided text boxes, specify the beginning and ending dates.

7. In the provided text boxes, specify placement fee and fee percentages, if applicable.

8. In the provided text boxes, indicate the bill rate and pay rate.

   Note: **DO NOT** enter ranges only whole numbers.

9. In the provided text box, enter the guarantee details.

10. From the provided list box, indicate whether the position should be marked as filled.

11. Click **Place**.

   The Placement frame is displayed and the candidate is listed.
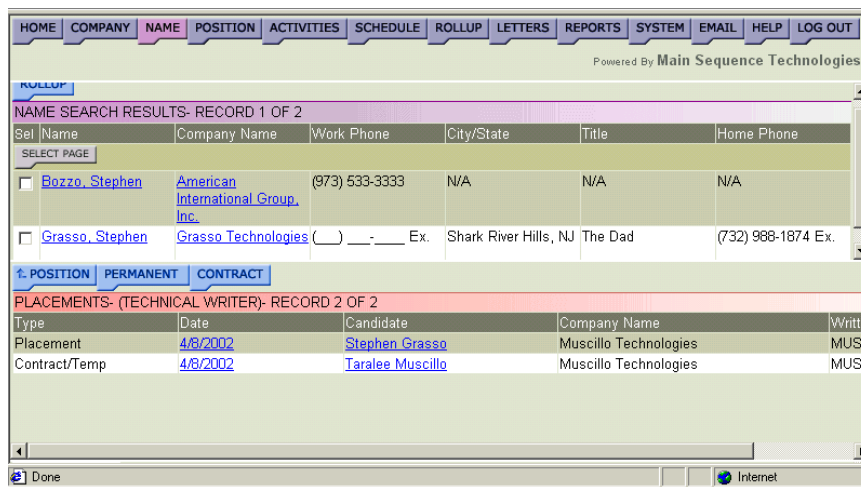
Figure 3-51

Deleting Positions

You can delete Positions that were added in error or that are no longer needed. Once a Position is deleted, it is removed from the database.

✍ *Only users with Administrative permissions can perform this procedure.*

Procedure 3-20   Deleting Positions

1. Retrieve the Position record you want to delete from the database. Chapter 4, Performing Searches for complete details.

2. Select the desired position from the Search Results frame.

   The Edit Position frame is displayed (Figure 3-12 on page 3-11).

3. Click the blue **Delete** button.

   A confirmation prompt is displayed.
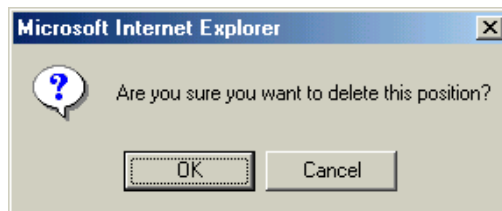
Figure 3-52

4. Click **OK** to confirm the deletion.

   A Delete Position message is displayed.

Figure 3-53

4

Performing Searches

What You'll Find in This Chapter

This chapter explains how to perform searches. PCRecruiter contains three types of searches that you can use to search the database for Companies, Names, and Positions; they are Quick Searches, Keyword Searches, and Advanced Searches. Refer to the following table for a description of the sections you will find in this chapter.

Table 4-1 What You'll Find in Chapter 4

If you want to…	Read…
Quickly search for a Company, Name, or Position in the database,	Performing a Quick Search on page 4-2.
Use keywords to locate specific Companies, Names, and Positions in the database.	Performing Keyword Searches on page 4-7.
Narrow your search for a one or more Companies, Names, or Positions by using advanced searching features,	Performing an Advanced Search on page 4-23.

Performing a Quick Search

You can perform Quick Searches from the Company Menu, Name Menu, and Position Menu frames. Search criteria include a specific field name and value pair. The field names are displayed in the provided list boxes and are specific to the frame you are in. For example, the following names are displayed in the Name Menu frame list box: First Name, Identification, Company Name, and Title as illustrated in Figure 4-1 below.

Figure 4-1

Values are typed in the corresponding text boxes. When entering values, you can enter a whole word or a partial word. All matches containing at least the same characters as those you entered are returned. Refer to the following sections for further details:

- Performing a Quick Search for a Company on page 4-2.

- Performing a Quick Search for a Name on page 4-4.

- Performing a Quick Search for a Position on page 4-6.

Performing a Quick Search for a Company

You can perform a Quick Search for a Company from the Company Menu frame. Results are displayed in the Company Search Results frame. From this frame you can perform multiple tasks, such as adding a new company and adding companies to Rollup Lists.

Procedure 4-1   Performing a Quick Search for a Company

1. Click the purple **Company** button from the Browser header.

   The Company Menu frame is displayed.

2. Define your search criteria. Do the following:

   - Using the provided list boxes, select your search criteria.

   - In the corresponding text boxes, type the search criteria values.

     For example, in Figure 4-2, the search criteria added was a partial company name and the city and state of Jersey City, NJ.
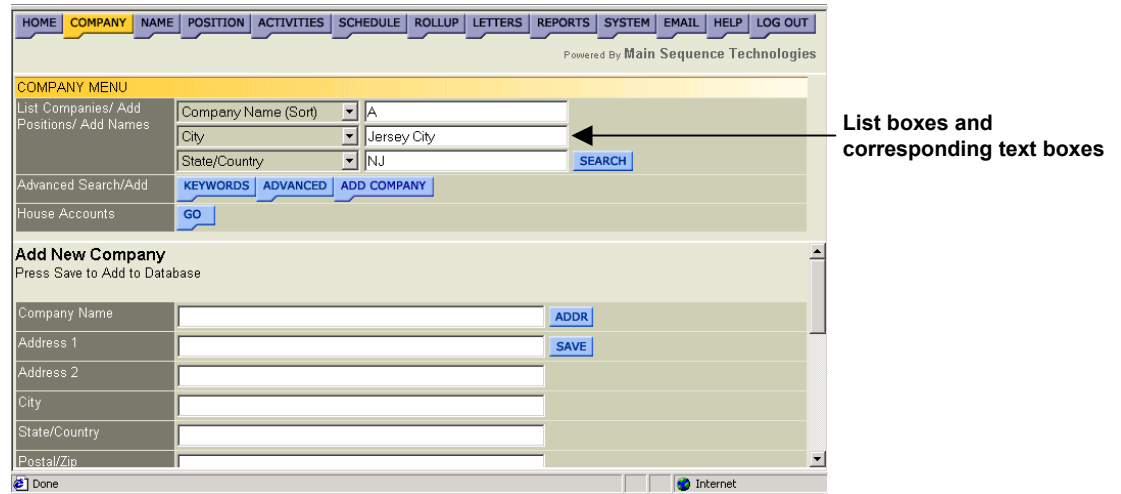
Figure 4-2

3. Click **Search**.

   The Company Search Results frame is displayed and companies matching your criteria are listed.
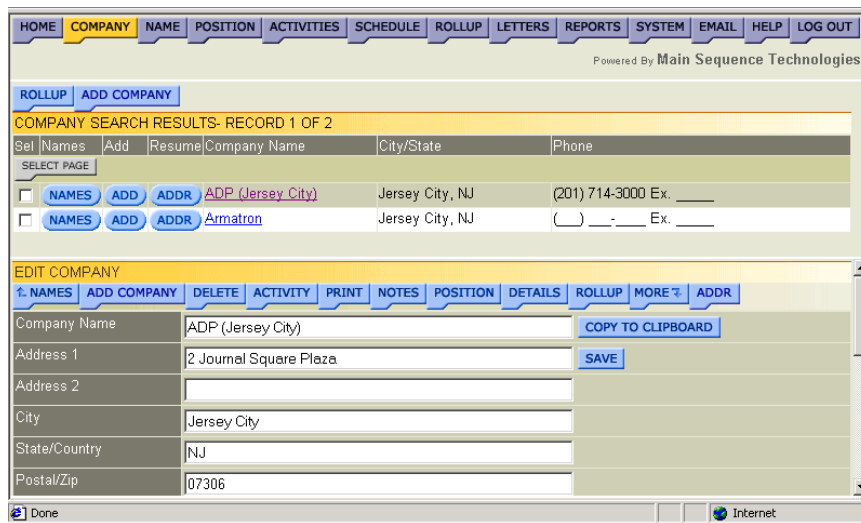
Figure 4-3

For example, two companies, ADP and Armatron, match the criteria entered in Figure 4-2.

4. If desired, do one or more of the following:

- To add one or more companies to a Rollup List, select the corresponding check boxes of the companies you want to add to the same list and click **Rollup**.

  Read Adding Items to Existing Rollup Lists in Chapter 7 for further details.

- To add another company, click **Add Company**.

  Read Adding a New Company in Chapter 1 for further details.

- To view the names associated with the company, select the corresponding check box and then click **Names**.

  Read Viewing Company Name Associations in Chapter 1 for further details.

- To associate a name with the company, select the corresponding check box and then click **Add**.

  Read Adding Names in Chapter 2 for further details.

- To associate a name and resume with the company, select the corresponding check box and click **ADDR**.

  Read Adding a Candidate in Chapter 2 for further details.

- To edit the company information, click the company name to display the Edit Company frame.

  Read Editing Company Information in Chapter 1 for further details.

Performing a Quick Search for a Name

You can perform a Quick Search for a Name from the Name Menu frame. Results are displayed in the Position Search Results frame. From this frame you can add names to Rollup Lists and view Name and Company information.

Procedure 4-2   Performing a Quick Search for a Name

1. Click the purple **Name** button from the Browser header.

   The Name Menu frame is displayed.

2. Define your search criteria. Do the following:

- Using the provided list boxes, select your search criteria.

- In the corresponding text boxes, type the search criteria values.

For example, in Figure 4-4, the search criteria added was Degree Type: EE and the State:NJ.
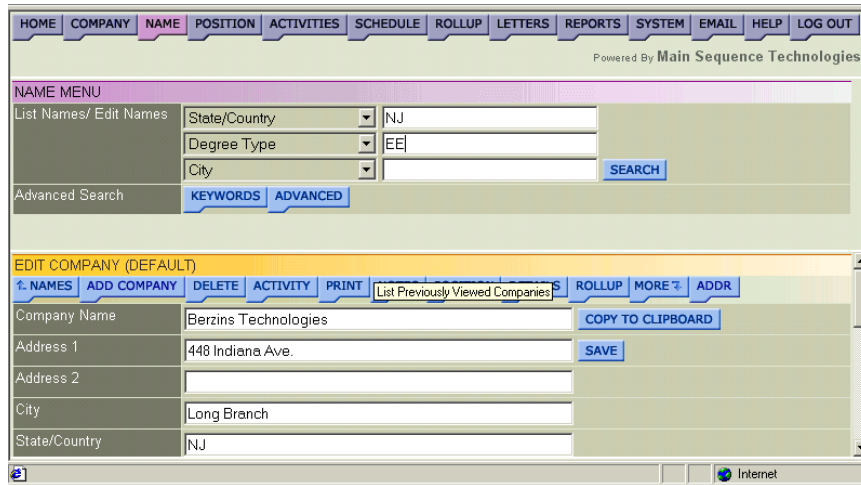
Figure 4-4

3. Click **Search**.

    The Name Search Results frame is displayed and names matching your criteria are listed.
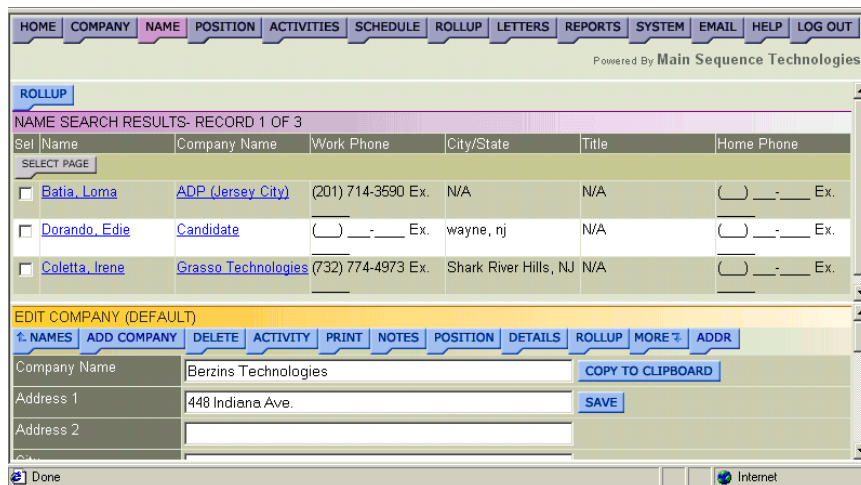
Figure 4-5

For example, three names: Batia, Loma; Dorando, Edie; and Coletta, Irene match the criteria entered in Figure 4-4.

4. If desired, do one or more of the following:

    *   To add one or more names to a Rollup List, select the corresponding check boxes of the names you want to add to the same list and click **Rollup**.

        Read Adding Items to Existing Lists in Chapter 7 for further details.

- To edit the name information, click the name to display the name information in the bottom frame.

  Read Editing Name Information in Chapter 2 for further details.

- To edit the company information, click the company name to display the Edit Company frame.

  Read Editing Company Information in Chapter 1 for further details.

Performing a Quick Search for a Position

You can perform a Quick Search for a Position from the Position Menu frame. Results are displayed in the Position Search Results frame. From this frame you can add positions to Rollup Lists and view Position and Company information.

Procedure 4-3   Performing a Quick Search for a Position

1. Click the purple **Position** button from the Browser header.

   The Position Menu frame is displayed.

2. Define your search criteria. Do the following:

   - Using the provided list boxes, select your search criteria.

   - In the corresponding text boxes, type the search criteria values.

   For example, in Figure 4-6, the search criteria added was Job Title: Project Manager and Industry: Utilities/IT Facilities Mgmt.
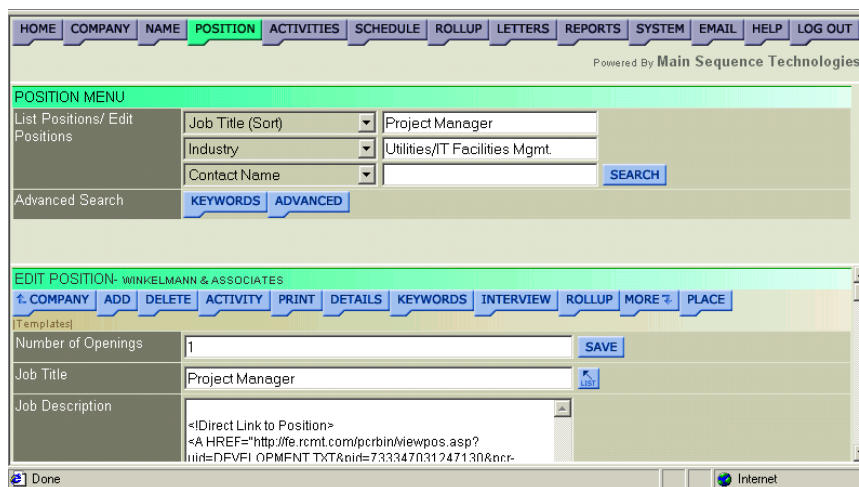
Figure 4-6

3. Click **Search**.

   The Position Search Results frame is displayed and positions matching your criteria are listed.
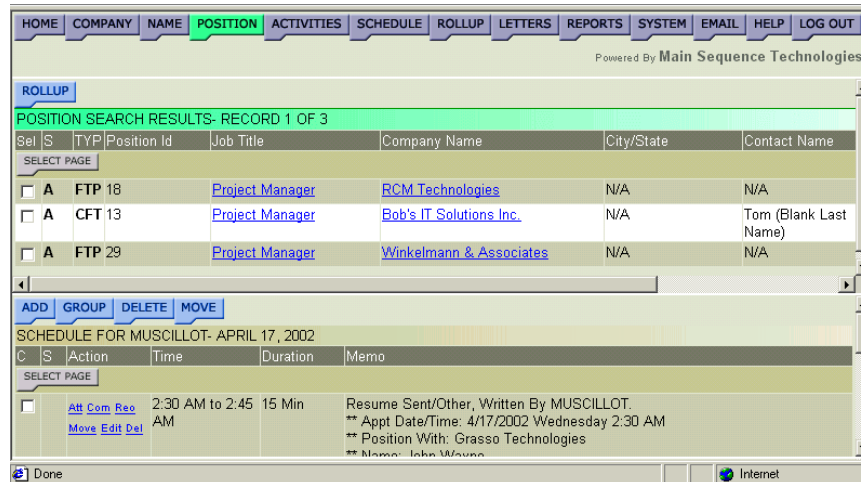
Figure 4-7

4. If desired, do one or more of the following:

   - To add one or more positions to a Rollup List, select the corresponding check boxes of the positions you want to add to the same list and click **Rollup**.

     Read Adding Items to Existing Lists in Chapter 7 for further details.

   - To edit the position information, click the position to display the Edit Position frame.

     Read Editing Position Information in Chapter 3 for further details.

   - To edit the company information, click the company name to display the Edit Company frame.

     Read Editing Company Information in Chapter 1 for further details.

Performing Keyword Searches

You can perform Keyword Searches from the Search Company by Keyword, Search Names by Keyword, and Search Positions by Keyword frames. Keywords are entered in the provided text box. You can manually enter keywords or use the List Dropdown feature to select the keywords from predefined lists.
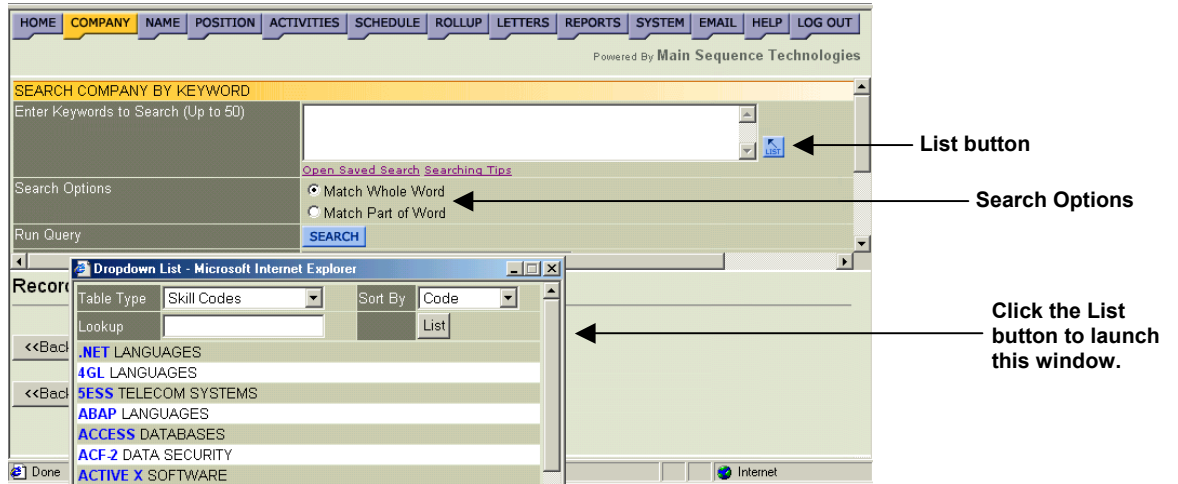
Figure 4-8

When entering multiple keywords, separate them with spaces. In addition, you can use the following syntax conventions:

Table 4-2 Keyword Syntax Descriptions

Convention	Description
word1 word2 word3 "word4 word5"	Returned matches will contain at least one of the words or phrases.
+word	Returned matches must contain the word or phrase
-word	Returned matches must not contain the word or phrase.
word1=word2=word3 or "word1 word2 word3"	Returned matches must contain the phrase.

After entering your keywords, you have the option of configuring the search to return whole word matches or partial word matches. For example:

- If you select **Whole Word** matches, your criteria *Technician* will not return the keyword *Technicians*.

- If you select **Partial Word** matches, your criteria *Tech* will return *Technical* and *Technician* keywords because they begin with *Tech*.

Performing a Keyword Search for a Company

You can perform a Keyword Search for a Company from the Search Company by Keyword frame. When searching for keywords, PCRecruiter will parse Company keywords and notes for the specified criteria.

Procedure 4-4   Performing a Keyword Search for a Company

1. Click the purple **Company** button from the Browser header.
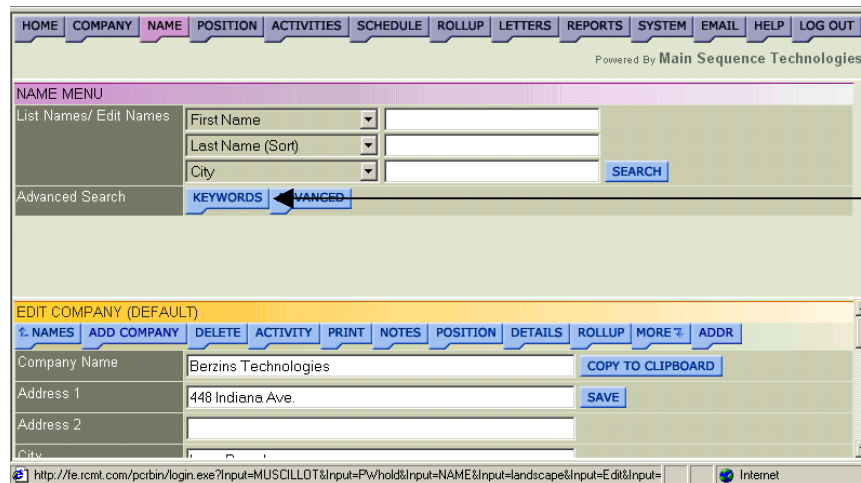
    The Company Menu frame is displayed.
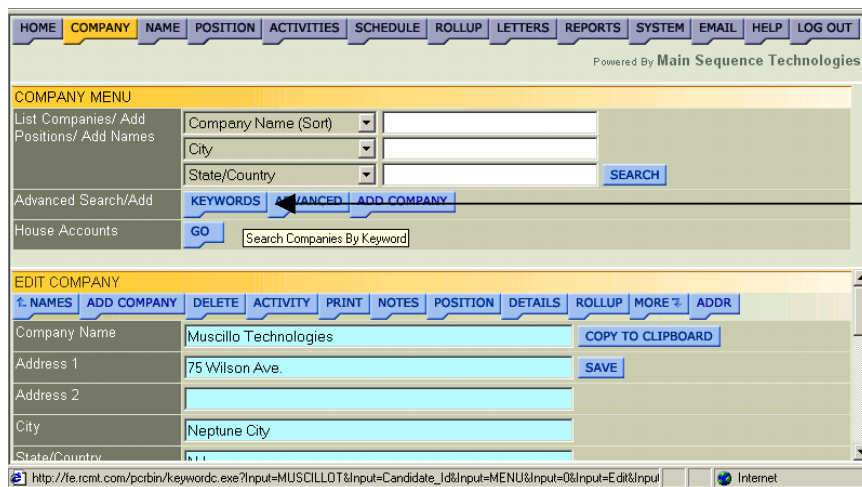
Figure 4-9

2. Click the blue **Keywords** button.

    The Search Company by Keyword frame is displayed.
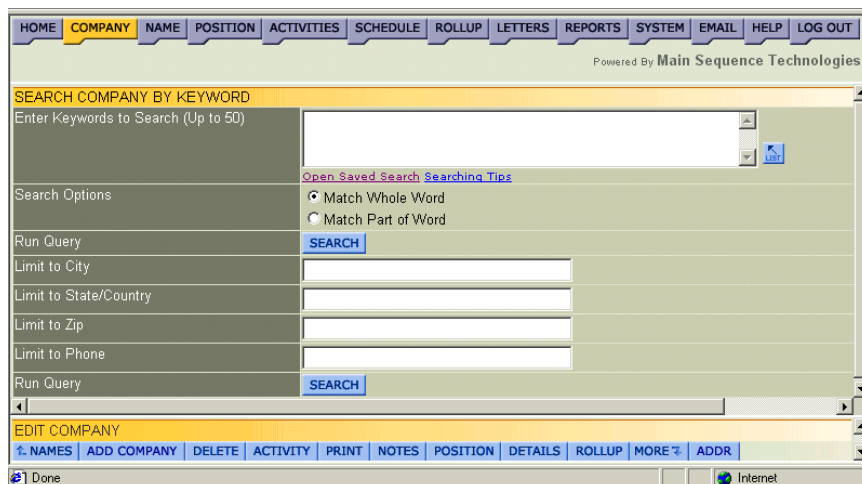
Figure 4-10

3. If you want to use a previous search, do the following:

- Click the **Open Saved Search** link.

  The Open Saved Search window is displayed.
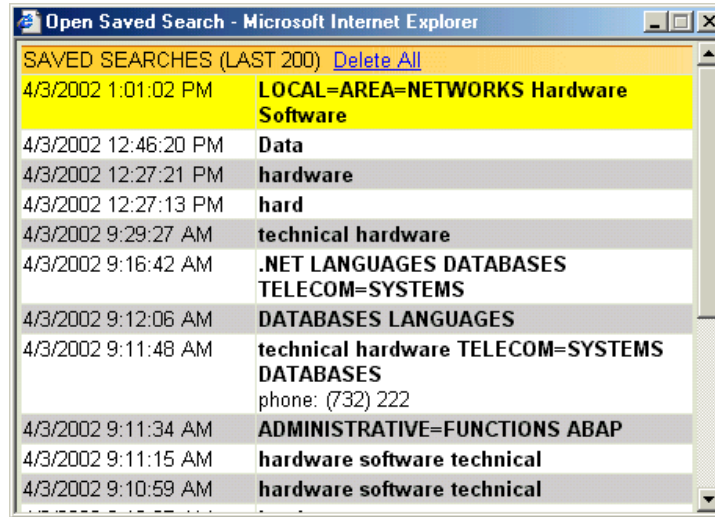
Figure 4-11

- Select the row containing the search criteria you want to use.

  The Open Saved Search window is closed and you are returned to the Search Company by Keyword frame. The selected criteria are displayed in the provided text box.

4. If you want to use predefined keywords, click **List**.

  The Dropdown List window is displayed.
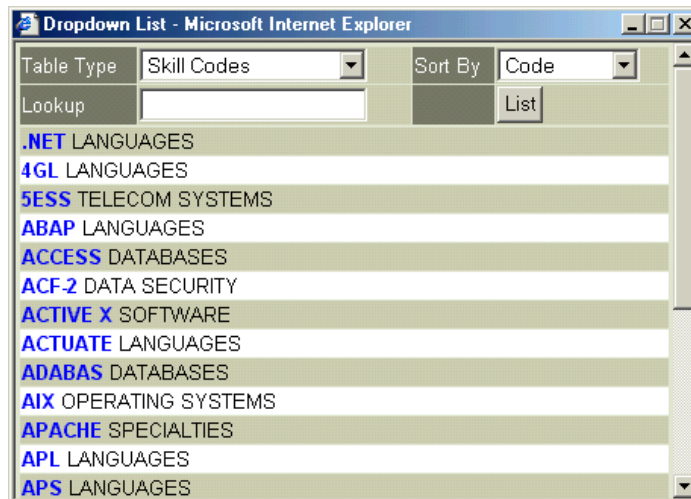
Figure 4-12

5. From the Dropdown List window, do the following:

    *   Select one or more keywords you want to use as search criteria.

        The Keywords are displayed in the provided text box as they are selected.

        > **Tip:** To display different keywords, select a different type from the Table Type list box such as Specialty Codes. To change how a list is sorted, select a different option from the Sort By list box. To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

    *   Close the window to return to the Search Company by Keyword frame.

6. If desired, type additional words in the provided text box.

    Refer to Table 4-2 on page 4-8 for syntax conventions.

7. Select one of the following search options:

    *   **Match Whole Word**. Select this radio button to configure the search to return whole word matches.

        For example, your criteria *Technician* will not return the keyword *Technicians*.

    *   **Match Part of Word**. Select this radio button to configure the search to return partial matches.

        For example, your criteria *tech* will return *Technical* and *Technician* keywords because they begin with *tech*.

8. Do one of the following:

    *   If you want to limit your search criteria further, go to Step 9.

    *   If you do not want to limit your search criteria further, go to Step 10.

9. Using the provided text boxes, limit your search to a particular city, state, zip, or telephone number.
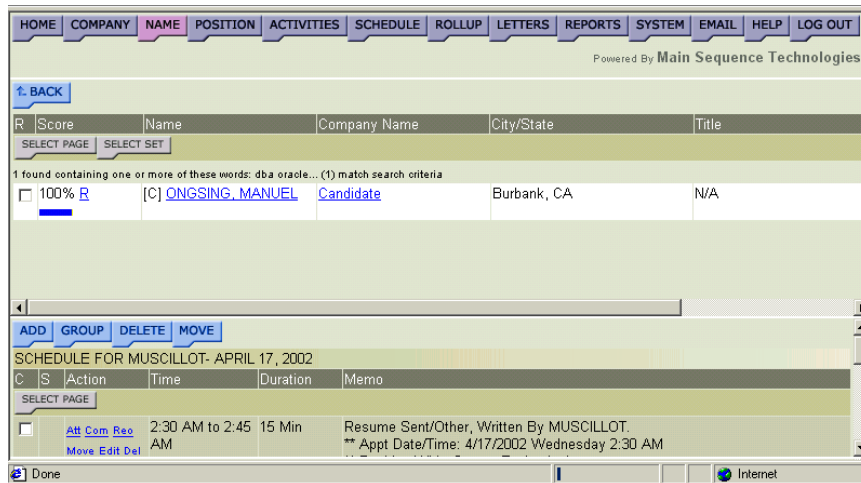
10. Click **Search**.

    Companies matching your search criteria are listed.
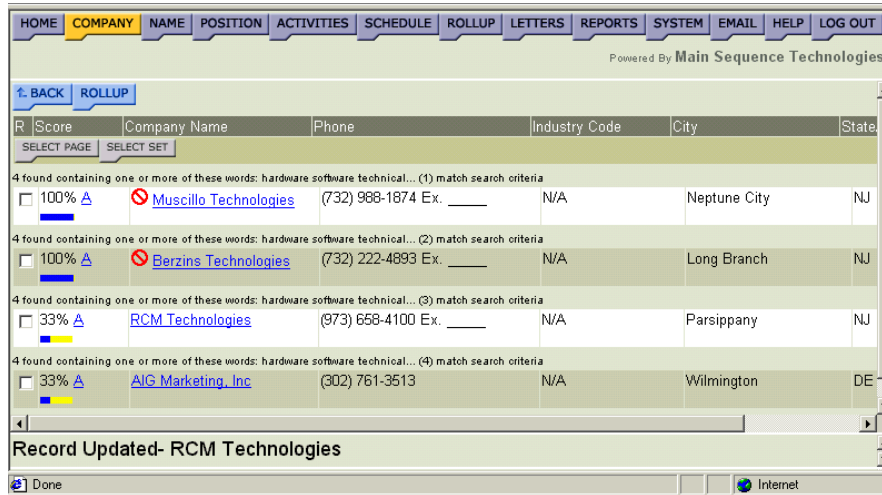
Figure 4-13

Matches are listed by percentage. The higher the percentage, the closer the match is to your query. The percentage is displayed numerically and as a blue and yellow status bar. The longer the blue line, the closer the match is to your query. A third green line may display. This line indicates the subjective score (usually rated 1 to 100). The longer the green line, the higher the subjective score.

11. If desired, do one or more of the following:

- To return to the Search Company by Keyword frame, click **Back**.

- To add one or more companies to a Rollup List, select the corresponding check boxes of the companies you want to add to the same list and click **Rollup**.

  Read Adding Items to Existing Rollup Lists in Chapter 7.

- To edit the company information, click the company name to display the Edit Company frame.

  Read Editing Company Information in Chapter 1 for further details.

- To view the notes and keywords for a particular company, click the **A** hyperlink.
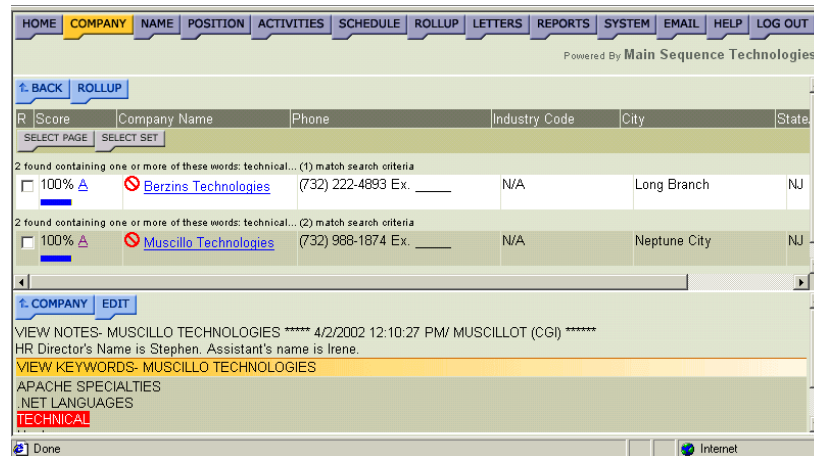
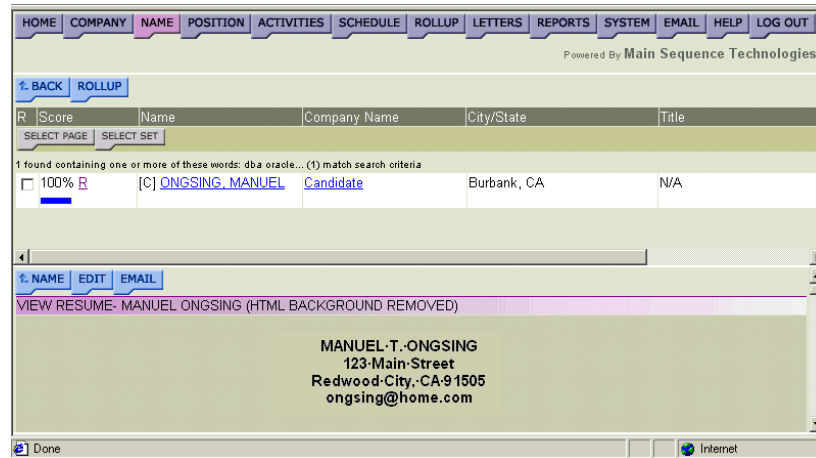**Figure 4-14**

Performing a Keyword Search for a Name

You can perform a Keyword Search for a Name from the Search Names by Keyword frame. When searching for keywords, PCRecruiter will parse Name keywords, notes, resumes, and summaries for the specified criteria.

Procedure 4-5   Performing a Keyword Search for a Name

1. Click the purple **Name** button from the Browser header.
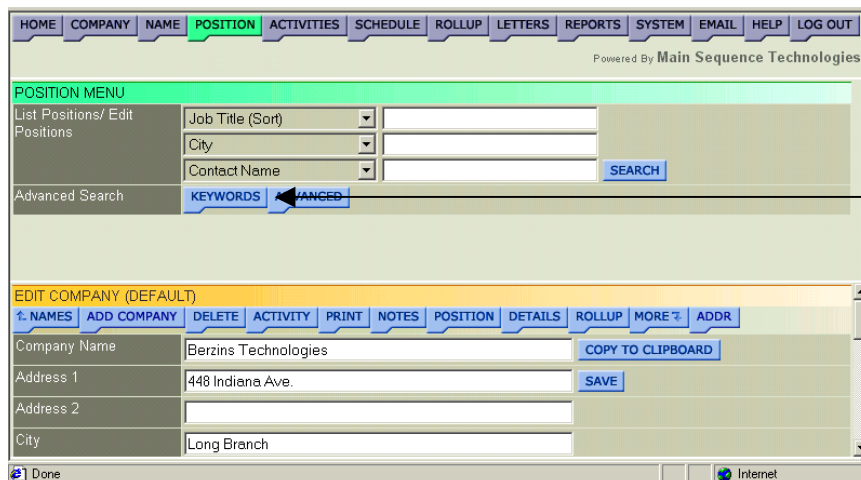
    The Name Menu frame is displayed.

Figure 4-15

2. Click the blue **Keywords** button.

The Search Names by Keyword frame is displayed.
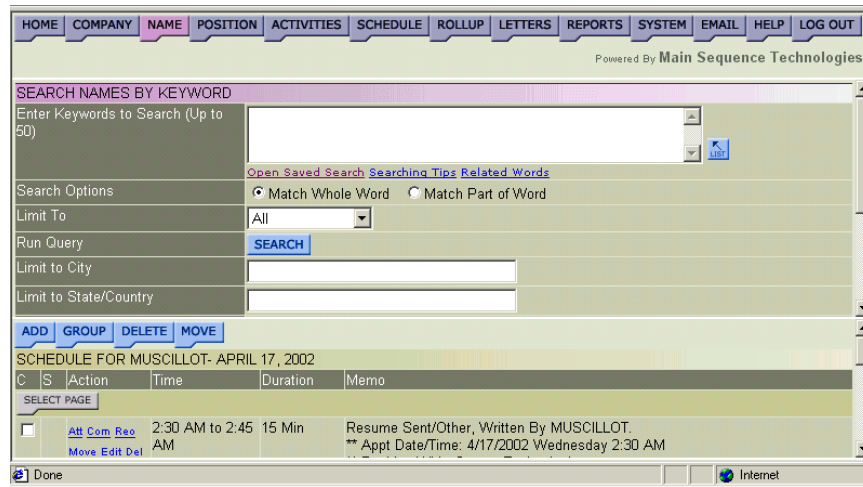
Figure 4-16

3. If you want to use a previous search, do the following:

- Click the **Open Saved Search** link.
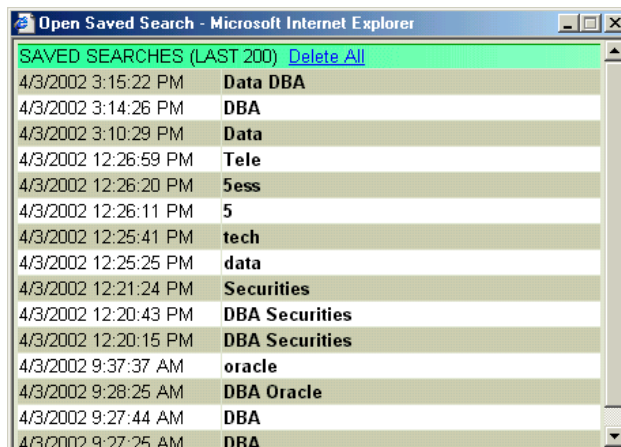
The Open Saved Search window is displayed.
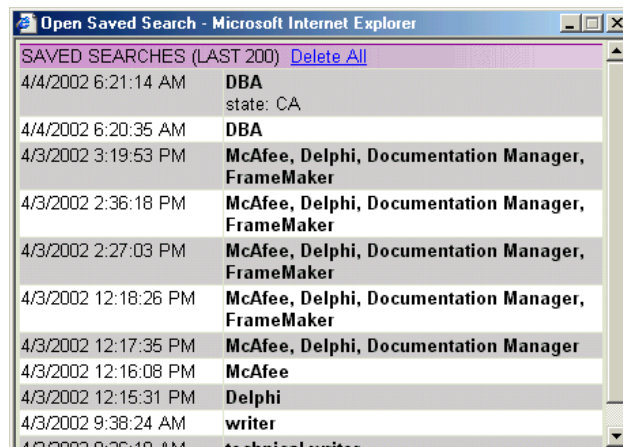
Figure 4-17

- Select the row containing the search criteria you want to use.

The Open Saved Search window is closed and you are returned to the Search Names by Keyword frame. The selected criteria are displayed in the provided text box.

4. If you want to use predefined keywords, click **List**.

   The Dropdown List window is displayed.
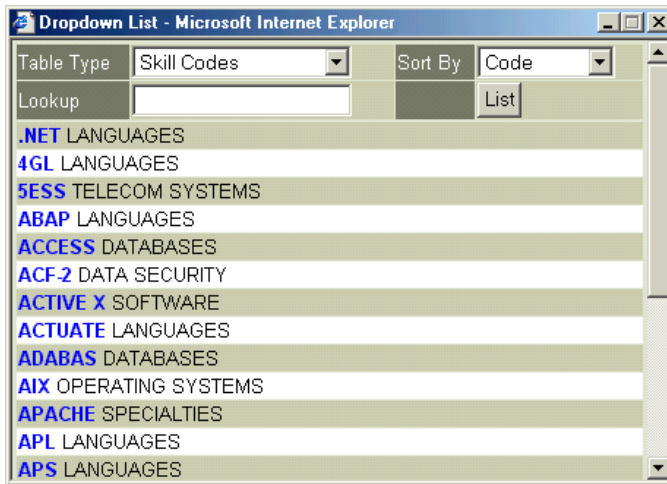
Figure 4-18

5. From the Dropdown List window, do the following:

   - Select one or more keywords you want to use as search criteria.

     The Keywords are displayed in the provided text box as they are selected.

     Tip: To display different keywords, select a different type from the Table Type list box such as Specialty Codes. To change how a list is sorted, select a different option from the Sort By list box. To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

   - Close the window to return to the Search Company by Keyword frame.

6. If desired, type additional words in the provided text box.

   Refer to Table 4-2 on page 4-8 for syntax conventions.

   Tip: To display different keywords similar to those entered in the Keyword search text box, click the **Related Words** link to display the Find Related Words window. Select additional words from the provided list to enter them in the Keyword search text box. Close the window when you are done.

7. Select one of the following search options:

   - **Match Whole Word.** Select this radio button to configure the search to return whole word matches.

For example, your criteria ***Administrator*** will not return the keyword *Administrators*.

- **Match Part of Word.** Select this radio button to configure the search to return partial matches.

  For example, your criteria ***admin*** will return *Administrator* and *Administration* keywords because they begin with ***admin***.

8. Do one of the following:

   - If you want to limit your search criteria further, go to Step 9.

   - If you do not want to limit your search criteria further, go to Step 10.

9. Using the provided text boxes, limit your search to a particular city, state, zip, or telephone number.

Figure 4-19

For example, in Figure 4-19, the Keywords entered are DBA and +Oracle. +Oracle indicates that returned results ***must*** contain the word Oracle. In addition, results are limited to the state of California only.

10. Click **Search**.

    Names matching your search criteria are listed.

Figure 4-20

Matches are listed by percentage. The higher the percentage, the closer the match is to your query. The percentage is displayed numerically and as a blue and yellow status bar. The longer the blue line, the closer the match is to your query. A third green line may display. This line indicates the subjective score (usually rated 1 to 100). The longer the green line, the higher the subjective score.

11. If desired, do one or more of the following:

- To return to the Search Company by Keyword frame, click **Back**.

- To add one or more names to a Rollup List, select the corresponding check boxes of the names you want to add to the same list and click **Rollup**.

  Read Adding Items to Existing Rollup Lists in Chapter 7.

- To edit the name information, click the name to display the name information in the bottom frame.

  Read Editing Name Information in Chapter 2 for further details.

- To edit the company information, click the company name to display the Edit Company frame.

  Read Editing Company Information in Chapter 1 for further details.

- To view the resume, notes/keywords, and summaries for a particular name, click the **R, N,** and **S** hyperlinks, respectively.

Figure 4-21

Performing a Keyword Search for a Position

You can perform a Keyword Search for a Position from the Search Positions by Keyword frame. When searching for keywords, PCRecruiter will parse Position keywords, descriptions, and notes for the specified criteria.

Procedure 4-6   Performing a Keyword Search for a Position

1. Click the purple **Position** button from the Browser header.

   The Position Menu frame is displayed.

Figure 4-22

2. Click the blue **Keywords** button.

The Search Positions by Keyword frame is displayed.
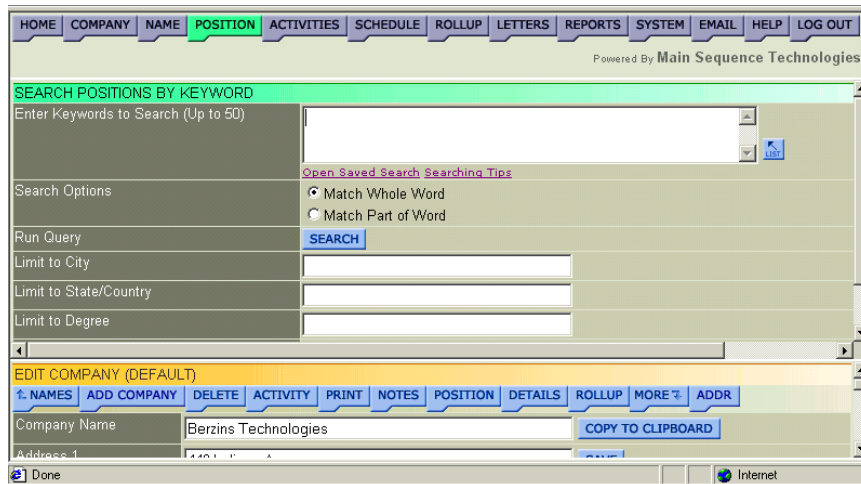
Figure 4-23

3. If you want to use a previous search, do the following:

- Click the Open Saved Search link.

The Open Saved Search window is displayed.

Figure 4-24

- Select the row containing the search criteria you want to use.

The Open Saved Search window is closed and you are returned to the Search Position by Keyword frame. The selected criteria are displayed in the provided text box.

4. If you want to use predefined keywords, click **List**.

    The Dropdown List window is displayed.
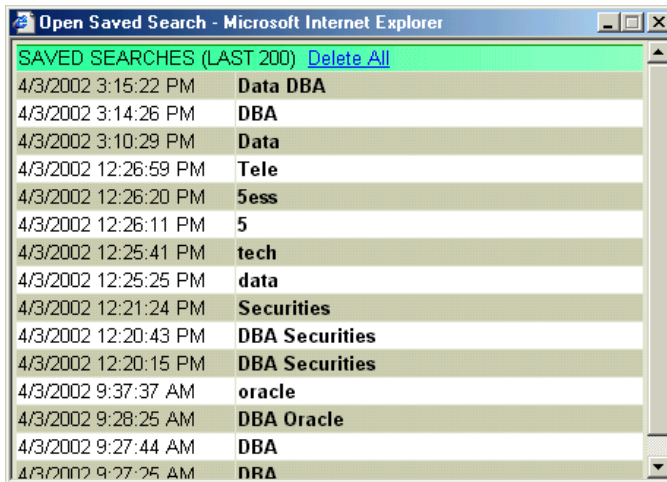
Figure 4-25

5. From the Dropdown List window, do the following:

    - Select one or more keywords you want to use as search criteria.

      The Keywords are displayed in the provided text box as they are selected.

      > **Tip:** To display different keywords, select a different type from the Table Type list box such as Specialty Codes. To change how a list is sorted, select a different option from the Sort By list box. To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

    - Close the window to return to the Search Position by Keyword frame.

6. If desired, type additional words in the provided text box.

    Refer to Table 4-2 on page 4-8 for syntax conventions.

7. Select one of the following search options:

    - **Match Whole Word.** Select this radio button to configure the search to return whole word matches.

      For example, your criteria *Technician* will not return the keyword *Technicians*.

    - **Match Part of Word.** Select this radio button to configure the search to return partial matches.

      For example, your criteria *tech* will return *Technical* and *Technician* keywords because they begin with *tech*.

8. Do one of the following:

   - If you want to limit your search further, go to Step 9.

   - If you do not want to limit your search further, go to Step 10.

9. Using the provided text boxes, limit your search to a particular city, state, zip, or telephone number.

Figure 4-26

For example, in Figure 4-26, the Keywords entered are the phrases *PMI's Project Professional* and *Project Manager*. Returned results **must** contain at least one of these phrases. In addition, results are limited to the state of Pennsylvania only.

10. Click **Search**.

   Positions matching your search criteria are listed.

Figure 4-27

Matches are listed by percentage. The higher the percentage, the closer the match is to your query. The percentage is displayed numerically and as a blue and yellow status bar. The longer the blue line, the closer the match is to your query. A third green line may display. This line indicates the subjective score (usually rated 1 to 100). The longer the green line, the higher the subjective score.

11. If desired, do one of the following:

- To return to the Search Company by Keyword frame, click **Back**.

- To add one or more names to a Rollup List, select the corresponding check boxes of the names you want to add to the same list and click **Rollup**.

  Read Adding Items to Existing Rollup Lists in Chapter 7 for further details.

- To edit the position information, click the position to display the Edit Position frame.

  Read Editing Position Information in Chapter 3 for further details.

- To edit the company information, click the company name to display the Edit Company frame.

  Read Editing Company Information in Chapter 1 for further details.

- To view the job description and keywords for a particular position, click the **J** hyperlink.
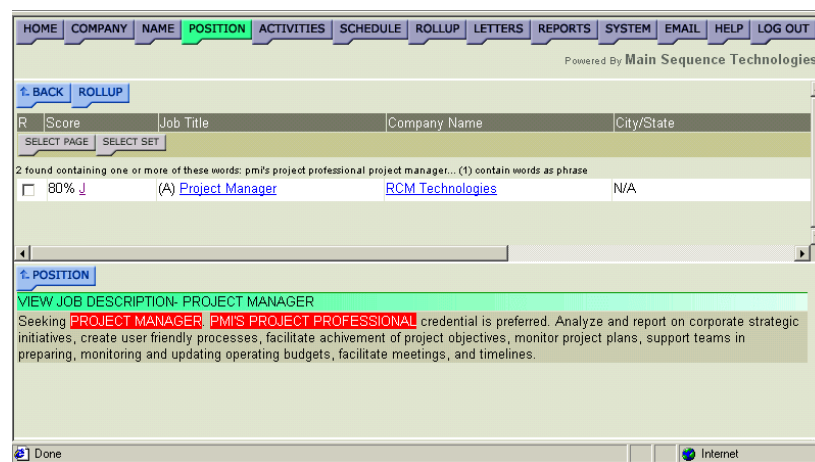
Figure 4-28

Performing an Advanced Search

You can perform Advanced Searches from the Advanced Company Search, Advanced Name Search, and Advanced Position Search frames. An Advanced Search is a combination of the Quick and Keyword Searches. When performing an Advanced Search, first you specify your *Field search criteria* and then you specify your K*eyword search criteria*. The *Keyword search criteria* includes the same functionality as the Keyword searches described in Performing Keyword Searches on page 4-7.

Similar to Quick Search criteria, *Field search criteria* include a specific field name and value pair. The field names are displayed in the Predefined and Custom list boxes and are specific to the frame you are in (i.e., Advanced Company Search, Advanced Name Search, and Advanced Position Search). The Predefined list box contains the field names available when you added a Company, Name, or Position. The Custom list box contains the field types available when you entered Company, Name, and Position Details.
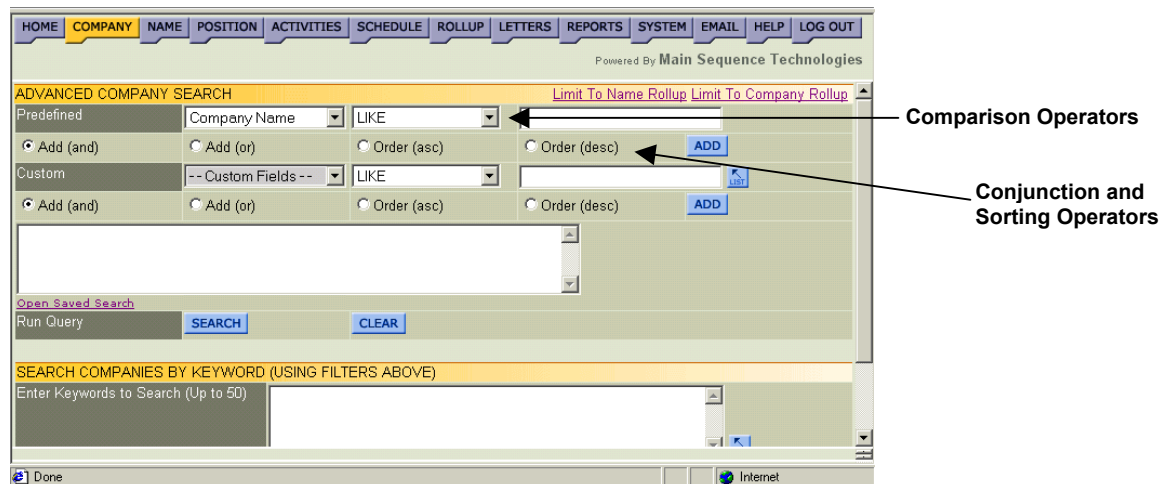
Figure 4-29

In addition to the features described above and in previous sections, the Field search criteria contain three additional features: Boolean Comparison Operators, Boolean Conjunction Operators**, and** Boolean Sorting Operators.

The **Boolean Comparison Operators** are used when adding a field name and value pair; they include:

- **Like**. Select this operator to return matches that begin with the same characters as the search criteria.

- **Not Like**. Select this operator to return all matches *except* those that begin with the same characters as the search criteria.

- **Greater-than**. Select this operator to return all matches whose characters are greater than the search criteria.

- **Less-than**. Select this operator to return all matches whose characters are less than the search criteria.

- **Less-than Equal**. Select this operator to return all matches whose characters are less than or equal to the search criteria.

- **Greater-than Equal**. Select this operator to return all matches that are equal to or greater than the search criteria.

- **Equal**. Select this operator to return all matches that are the same as the search criteria.

- **Not Equal**. Select this operator to return all matches except those that are the same as the search criteria.

- **Is Empty.** Select this operator to return all matches whose fields are Null.

- **Is Not Empty.** Select this operator to return all matches whose fields are not Null.

The **Boolean Conjunction Operators** are used when adding a multiple field name and value pairs; they include:

- **And**. Select this operator to add another query statement. Matches that meet **both** requirements will be returned.

- **Or**. Select this operator to add another query statement. Matches that meet **at least** one requirement will be returned.

The **Boolean Sorting Operators** are optional and are used when adding at least field name and value pair; they include:

- **Asc**. Select this operator to return matches in ascending order (A, B, C, and 1, 2, 3).

- **Desc**. Select this operator to return matches in descending order (C, B, A and 3, 2, 1).

Refer to the following sections for further details:

- Specifying Field Search Criteria on page 4-25.

- Specifying Keyword Search Criteria on page 4-30.

Specifying Field Search Criteria

As mentioned in Performing an Advanced Search on page 4-23, specifying Field search criteria is similar to specifying Quick Search criteria. In addition, the Advanced Field search criteria contain three additional features: Boolean Comparison Operators, Boolean Conjunction Operators, and Boolean Sorting Operators. To learn more about these features, read the discussion starting on page 4-23.

Procedure 4-7   Specifying Field Search Criteria

1. Click one of the following purple buttons from the Browser header: **Company, Name,** or **Position**.

    The Menu frame for the button you selected is displayed.
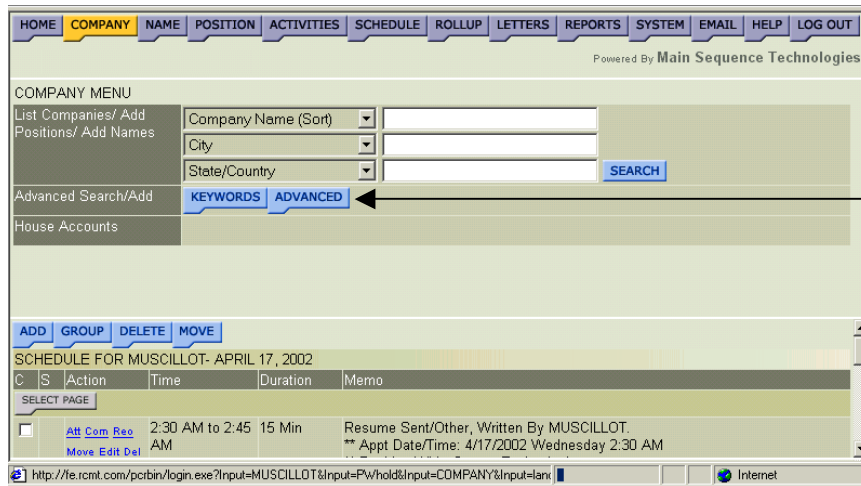
Figure 4-30

2. Click the blue **Advanced** button.

    The Advanced Search frame is displayed (Figure 4-29 on page 4-23).

3. If you want to use a previous search, do the following:

    - Click the Open Saved Search link.

        The Open Saved Search window is displayed.
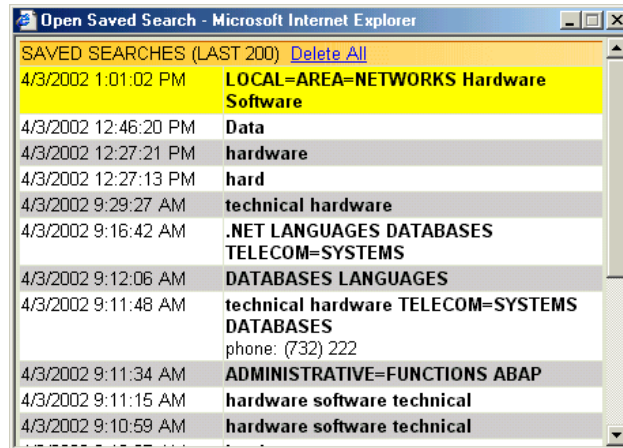
Figure 4-31

- Select the row containing the search criteria you want to use.

    The Open Saved Search window is closed and you are returned to the Advanced Search frame. The selected criteria are displayed in the provided text box.

4. If you want to narrow your search to a specific Rollup List item type, do the following:

    - Click one of the following links:

        - **Limit to Name Rollup.** Select this link if you want to narrow your search to matches that are associated with the names contained in the selected Rollup List.

            For example, if you are in the Advanced Company Search frame and you select the **Limit to Name Rollup** link, then only companies matching all criteria specified *and* that are a parent company of a name in the selected Rollup List will be returned.

        - **Limit to Company Rollup.** Select this link if you want to narrow your search to matches that are associated with the companies contained in the selected Rollup List.

            For example, if you are in the Advanced Position Search frame and you select the **Limit to Company Rollup** link, then only positions matching all criteria specified *and* that are associated with a company in the selected Rollup List will be returned.

The Limit to Rollup List frame is displayed in the Rollup Lists window.
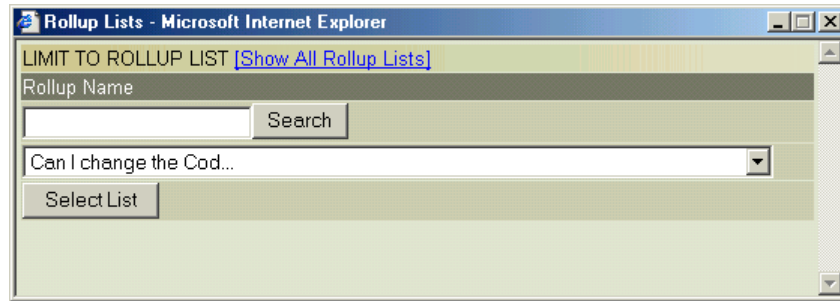
Figure 4-32

- If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

- From the provided list box, select the desired Rollup List name.

  Tip: To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

- Click Select List.

You are returned to the Advanced Search frame and your Rollup List selection is formatted as a query statement and displayed in the provided text box.

5. Using the Predefined/Custom list and text boxes, do the following:

   - Select the field on which you want to base your search criteria.

     For example, if you are in the Advanced Company Search frame, choose Number of Employees from the Predefined list box or *Additional Email from the Custom list box.

   - Specify your Comparison operator.

     For a complete list of Comparison operators and their descriptions, refer to the discussion starting on page 4-23.

   - In the provided text box, enter a value for the selected field.

6. Click **Add**.

   The criteria is formatted as a query statement and displayed in the provided text box.
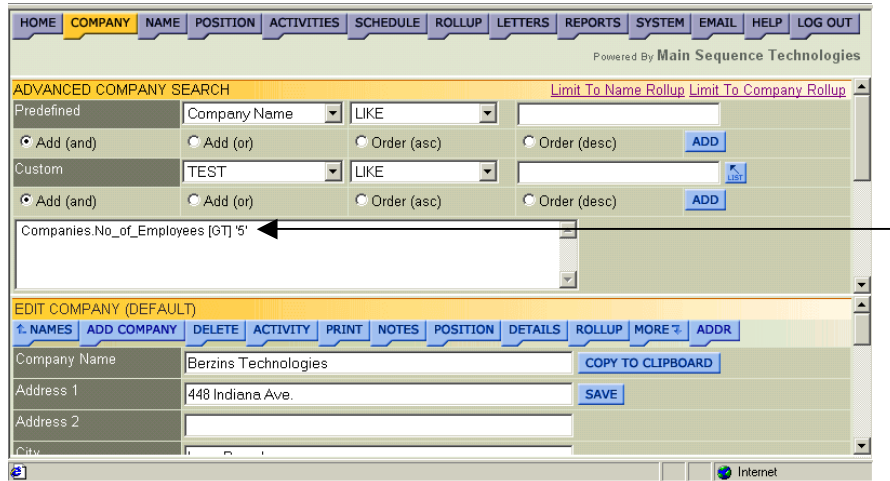
Figure 4-33

7. Do one of the following:

    •   If you want to add another query statement, go to Step 8.

    •   If you do not want to add another query statement, go to Step 9.

8. If you are adding another query statement, do the following:

    •   Select a conjunction operator:

        •   **And**. Select this operator to add another query statement. Matches that meet **both** requirements will be returned.

        •   **Or**. Select this operator to add another query statement. Matches that meet **at least** one requirement will be returned.

    •   Repeat Step 5.

9. If desired, specify an order operator. First, select one of the following operators and then click **Add**:

    •   **Asc**. Select this operator to return matches in ascending order (A, B, C, and 1, 2, 3).

    •   **Desc**. Select this operator to return matches in descending order (C, B, A and 3, 2, 1).
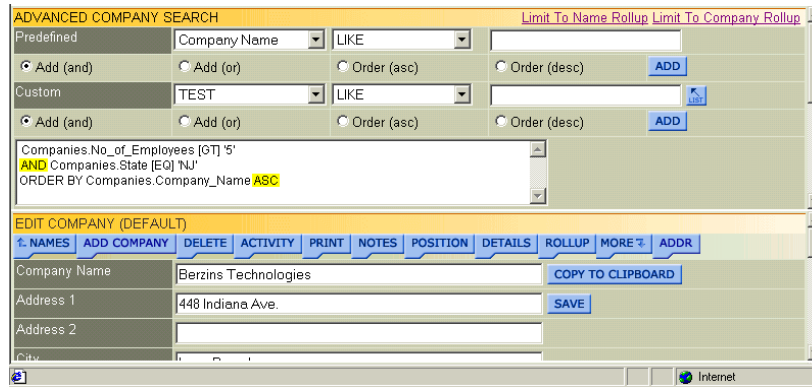
Figure 4-34

For example, in Figure 4-34, a second query statement was added using the conjunction **AND**. Also in Figure 4-34, a third query statement was added indicating that matches should be returned in ascending (**ASC**) order — in this case, alphabetical.

10. Do one of the following:

- If you want to further define your search with keywords, perform Procedure 4-8 on page 4-30.

- If you want to run the query, click **Search**.

    Items matching your search criteria are returned.
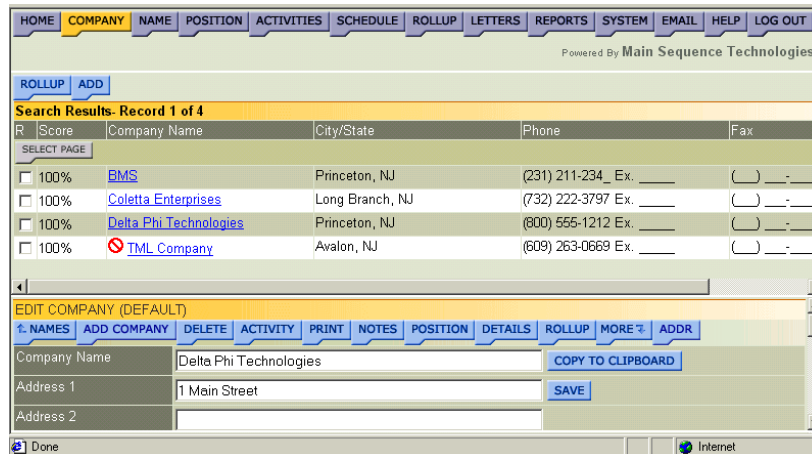
Figure 4-35

Specifying Keyword Search Criteria

When performing an Advanced Search, it is not necessary to specify Keywords. However, if you do specify keywords, results that are returned will meet the Field search criteria *as well as* the Keyword search criteria.

Note: The following procedure assumes that you have performed Procedure 4-7 on page 4-30.

Procedure 4-8   Specifying Keyword Search Criteria

1. If you want to use predefined keywords, click **List**.

    This Dropdown List window is displayed.
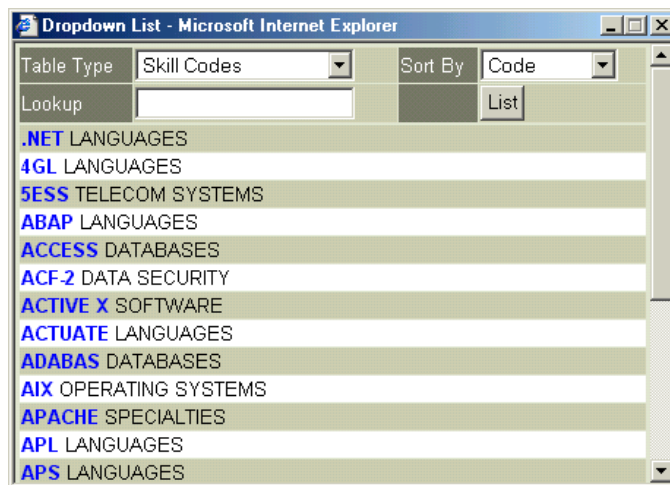
Figure 4-36

2. From the Dropdown List window, do the following:

    *   Select one or more keywords you want to use as search criteria.

        The keywords are displayed in the provided text box as they are selected.

        Tip: To display different keywords, select a different type from the Table Type list box such as Specialty Codes. To change how a list is sorted, select a different option from the Sort By list box. To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

    *   Close the window to return to the Advanced Search frame.

3. If desired, type additional words in the provided text box.

    Refer to Table 4-2 on page 4-8 for syntax conventions.
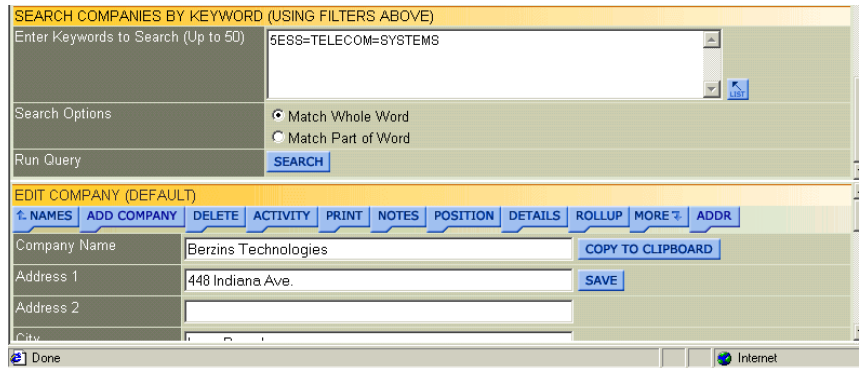
Figure 4-37

For example, in Figure 4-37, the Keywords entered is the phrase *5ESS Telecom Systems*. Returned results meet the criteria entering in Procedure 4-7 and contain the phrase *5ESS Telecom Systems*.

4. Select one of the following search options:

- **Match Whole Word.** Select this radio button to configure the search to return whole word matches.

  For example, your criteria **Database** will not return the keyword *Databases*.

- **Match Part of Word.** Select this radio button to configure the search to return partial matches.

  For example, your criteria **Data** will return the keywords *Database* and *DataSmart* because they begin with **Data**.

5. Click **Search**.

Items matching your search criteria are returned.
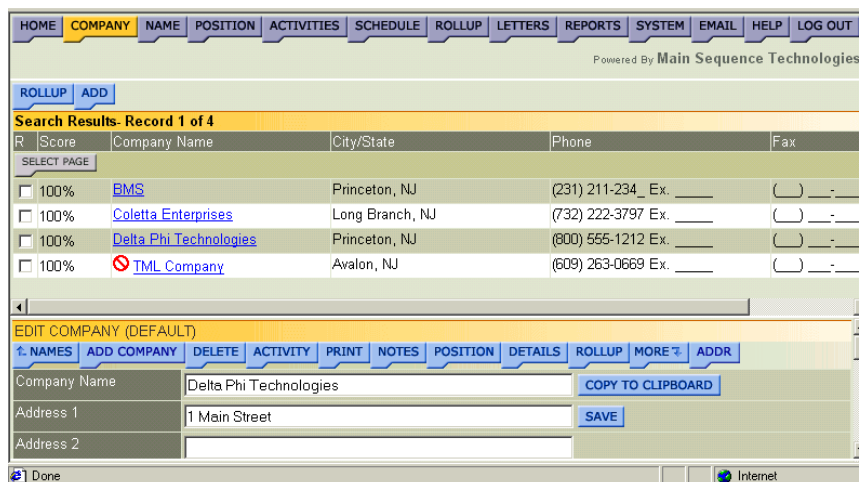
Figure 4-38

5

Viewing Activities

What You'll Find in This Chapter

This chapter explains how to view company, name, and position activities. It explains how to group activities together in Rollup Lists and how to generate Company, Name, and Position Activity Reports.

In addition, this chapter also explains how to view interview and contractor lists. Refer to the following table for a description of the sections you will find in this chapter.

Table 5-1 What You'll Find in Chapter 5

If you want to…	Read…
View activities for all companies or for a specific company,	Viewing Company Activities on page 5-2.
View some or all activities for a specific name or for all names,	Viewing Name Activities on page 5-7.
View a list of all interviews or a list of interviews for a specific position, company, or name,	Viewing Interviews on page 5-12.
View a list of all positions or a list of positions for a specific company or job title,	Viewing Position Activities on page 5-19.
View a list of available contractors and temporary employees,	Viewing All Contractor/Temp Candidates on page 5-25.
View a list of contractors and temporary employees that are on assignment,	Viewing Contractors/Temps on Assignment on page 5-28.

Viewing Company Activities

You can view a list of activities for all companies or for a specific company from the Company Activities frame. From this frame you can also group activities in a Rollup List and print a Company Activity Report.

Procedure 5-1   Viewing Company Activities

1. Click the purple **Activities** button in the Browser header.

    The View Activities frame is displayed.
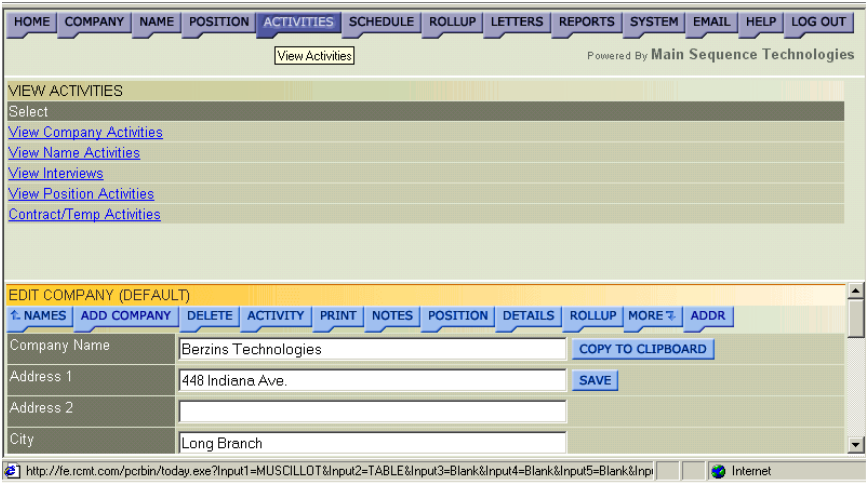
Figure 5-1

2. Click the **View Company Activities** link.

    The Company Activities frame is displayed.
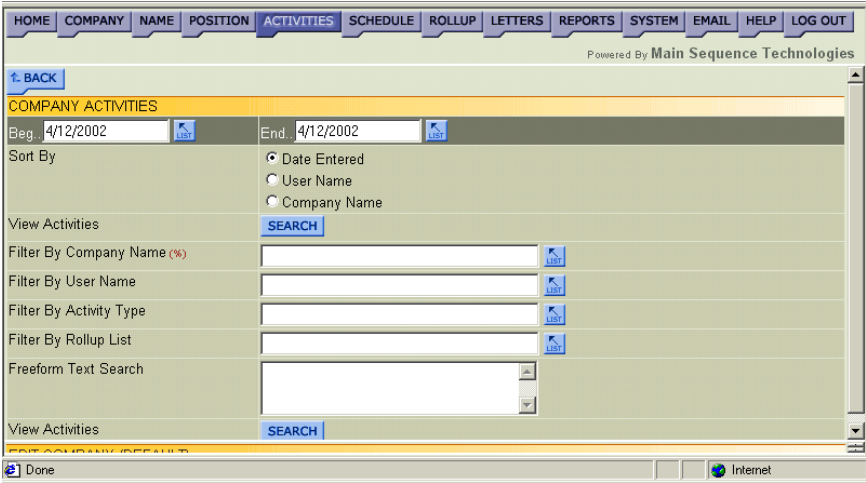
Figure 5-2

3. In the Beg and End text boxes, specify the time range for which you want to view company activities. Type the dates or do the following:

   - Click the corresponding **List** button to display the Select Date and Time window.
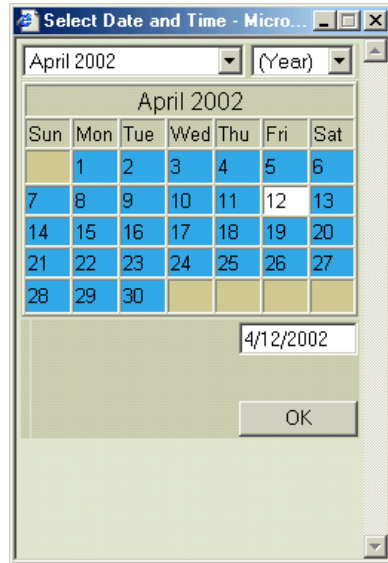
Figure 5-3

   - Use the provided controls to set a new date and click **OK**.

   You are returned to the Name Activities frame and your selections are displayed in the provided text boxes.

4. Choose one of the following sort options:

   - **Date Entered.** Choose this option to sort matches by the date they were entered in the system.

   - **User Name.** Choose this option to sort matches by the user name of the person who created the activity.

   - **Company Name.** Choose this option to sort matches by the name of the company with which the activity is associated.

5. Do one of the following:

   - If you want to define your criteria further, go to Step 6.

   - If you want to run the query, click **Search**.

     Name activities generated during the time period specified are returned.

6. If you want to filter your activities by Company Name, do the following:

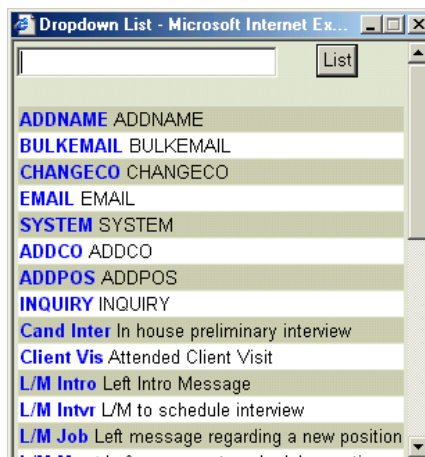   - Click the corresponding **List** button to display the Dropdown List window.

    - Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 5-4

    - Click the desired name.

      You are returned to the Company Activities frame and your selection is displayed in the Filter by Company Name text box.

7. If you want to filter your activities by User Name, do the following:

    - Click the corresponding **List** button to display the Dropdown List window.
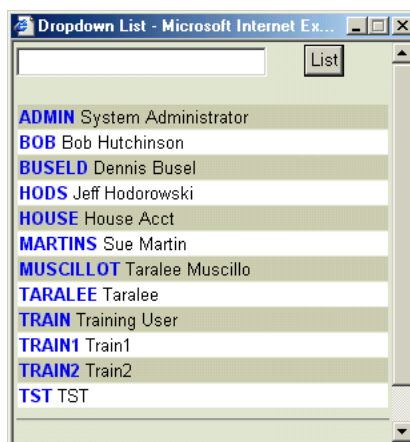
Figure 5-5

    - Click the desired name.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Company Activities frame and your selection is displayed in the Filter by User Name text box.

8. If you want to filter your activities by Activity Type, do the following:

-   Click the corresponding **List** button to display the Dropdown List window.
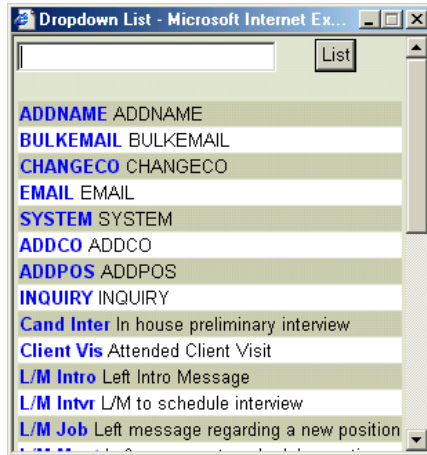
Figure 5-6

-   Click the desired type.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Company Activities frame and your selection is displayed in the Filter by Activity Type text box.

9. If you want to filter your activities by Rollup List, do the following:

-   Click the corresponding **List** button to display the Limit to Rollup List frame in the Dropdown List window.
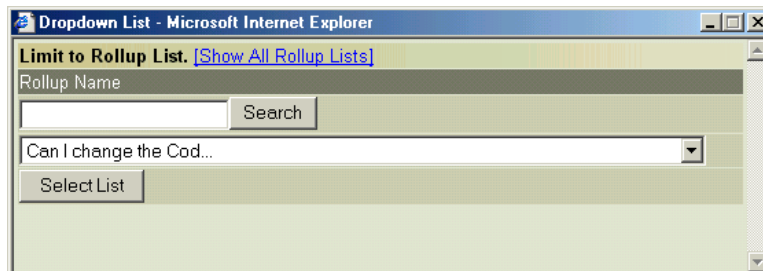
Figure 5-7

-   If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

- From the provided list box, select the desired Rollup List name.

  Tip: To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

- Click **Select List**.

  You are returned to the Company Activities frame and your selection is displayed in the Filter by Rollup List text box.

10. If you want to filter your activities by the Activity Text, type the text in the Freeform Text Search text box.

11. Click **Search**.

    Company activities matching your criteria are returned for the time period specified.
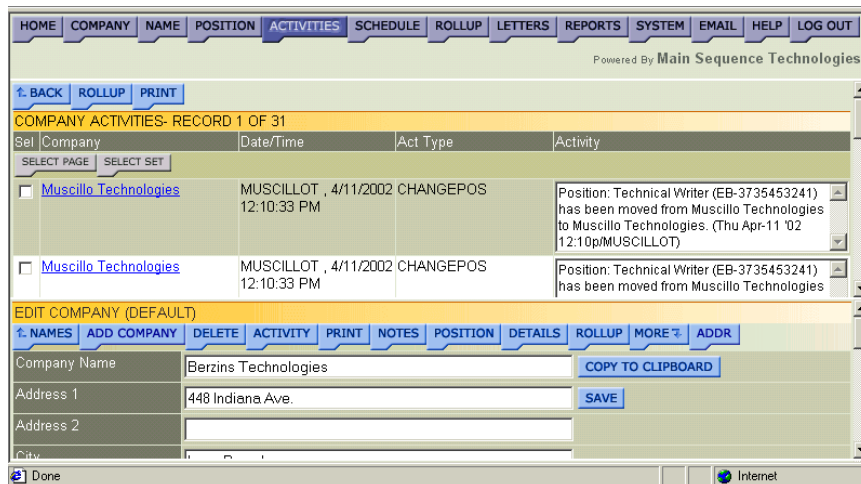
Figure 5-8

12. If desired, do one of the following:

- To add one or more activities to a Rollup List, select the corresponding check boxes of the activities you want to add to the same list and click **Rollup**.

  Read Adding Items to Existing Rollup Lists in Chapter 7 for further details.

- To generate a Company Activity Report, click **Print**.

Figure 5-9

Viewing Name Activities

You can view a list of activities for all names or for a specific name from the Name Activities frame. You can also view a list of name activities for a specific name, company, or Rollup List. From the Name Activities frame you can also group activities in a Rollup List and print a Name Activity Report.

Procedure 5-2   Viewing Name Activities

1. Click the purple **Activities** button in the Browser header.

   The View Activities frame is displayed (Figure 5-1 on page 5-2).

2. Click the **View Name Activities** link.

   The Name Activities frame is displayed.

Figure 5-10

3. In the Beg and End text boxes, specify the time range for which you want to view name activities. Type the dates or do the following:

    - Click the corresponding **List** button to display the Select Date and Time window (Figure 5-3 on page 5-3).

    - Use the provided controls to set a new date and click **OK**.

    You are returned to the Name Activities frame and your selections are displayed in the provided text boxes.

4. Choose one of the following sort options:

    - **Date Entered.** Choose this option to sort matches by the date they were entered in the system.

    - **Last Name.** Choose this option to sort matches by last name of the person with which the activity is associated.

    - **User Name.** Choose this option to sort matches by the user name of the person who created the activity.

    - **Company Name.** Choose this option to sort matches by the name of the company with which the activity is associated.

5. Do one of the following:

    - If you want to define your criteria further, go to Step 6.

    - If you want to run the query, click **Search**.

    Name activities generated during the time period specified are returned.

6. If you want to filter your activities by Last Name or First Name, do the following:

    - Click the corresponding **List** button to display the Dropdown List window.

    - Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.
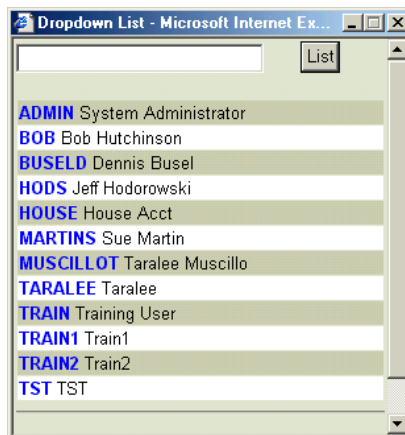
Figure 5-11

- Click the desired name.

    You are returned to the Name Activities frame and your selection is displayed in the corresponding text box.

7. If you want to filter your activities by User Name, do the following:

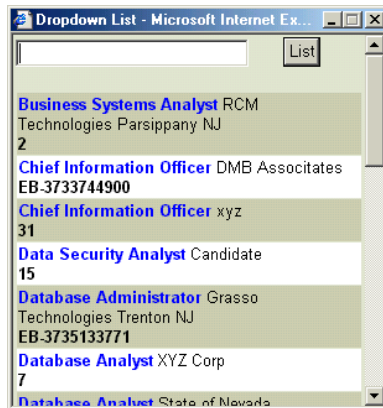   - Click the corresponding **List** button to display the Dropdown List window.
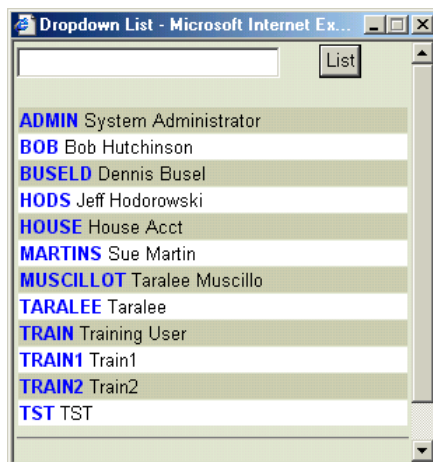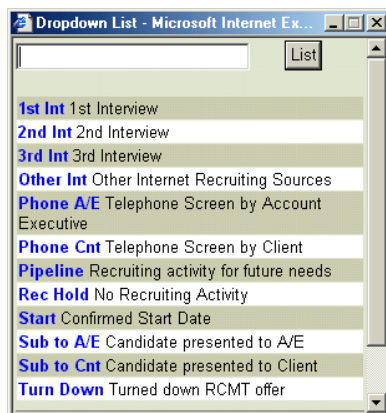

Figure 5-12

- Click the desired name.

    > **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

    You are returned to the Name Activities frame and your selection is displayed in the Filter by User Name text box.

8. If you want to filter your activities by Company Name, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

- Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 5-13

- Click the desired name.

  You are returned to the Name Activities frame and your selection is displayed in the Filter by Company Name text box.

9. If you want to filter your activities by Activity Type, do the following:

- Click the corresponding **List** button to display the Dropdown List window.
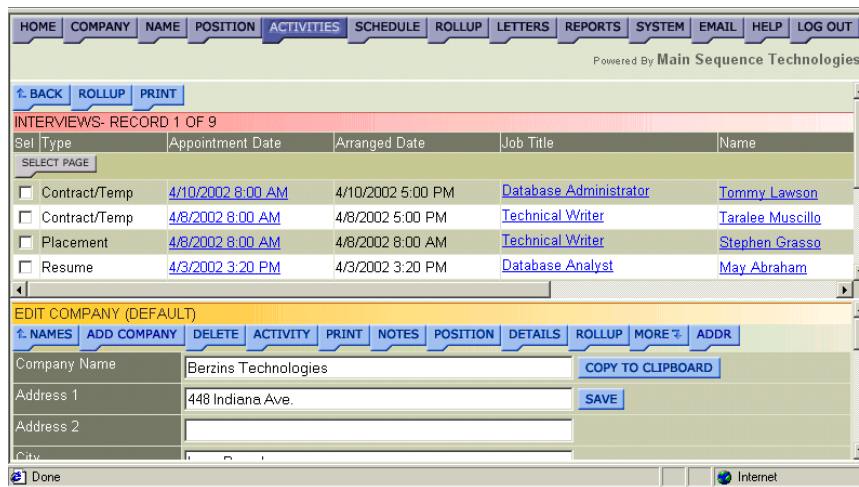

Figure 5-14

- Click the desired type.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Name Activities frame and your selection is displayed in the Filter by Activity Type text box.

10. If you want to filter your activities by Rollup List, do the following:

- Click the corresponding **List** button to display the Limit to Rollup List frame in the Dropdown List window.
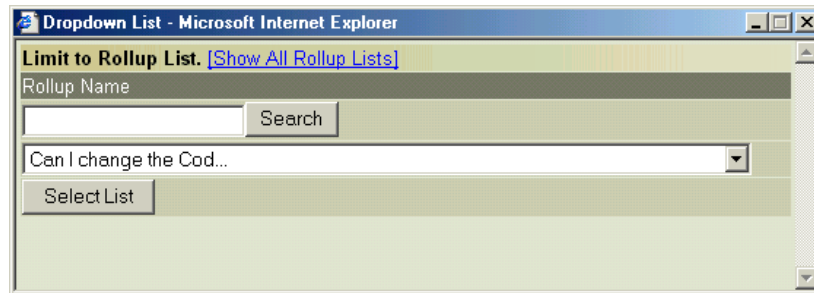
Figure 5-15

- If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

- From the provided list box, select the desired Rollup List name.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

- Click **Select List**.

You are returned to the Name Activities frame and your selection is displayed in the Filter by Rollup List text box.

11. If you want to filter your activities by the Activity Text, type the text in the Freeform Text Search text box.

12. Click **Search**.

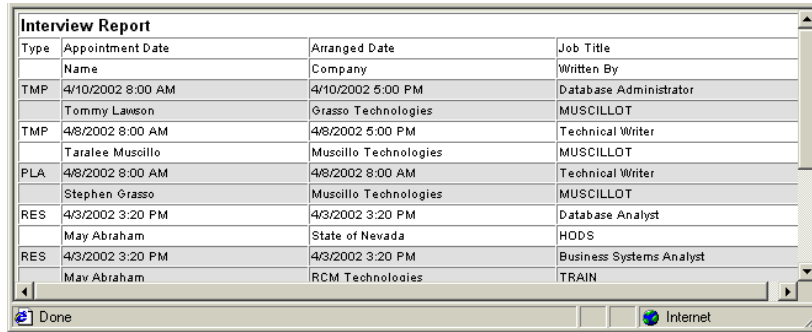Name activities matching your criteria are returned for the time period specified.
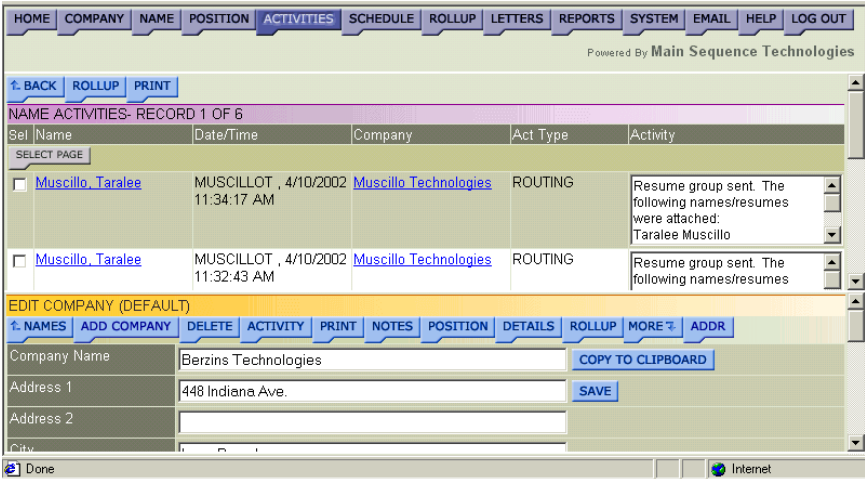
Figure 5-16

13. If desired, do one of the following:

- To add one or more activities to a Rollup List, select the corresponding check boxes of the activities you want to add to the same list and click **Rollup**.

  Read Adding Items to Existing Rollup Lists in Chapter 7 for further details.

- To generate a Name Activity Report, click **Print**.
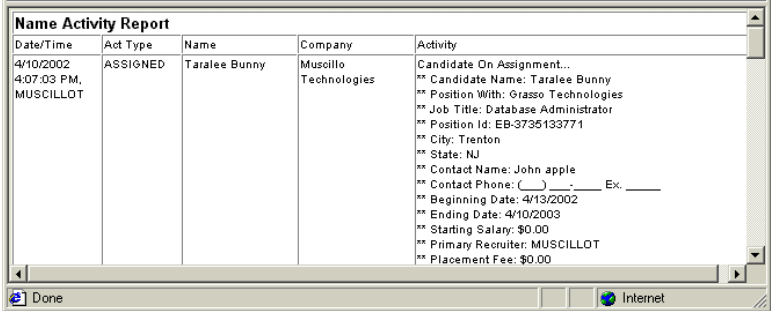
Figure 5-17
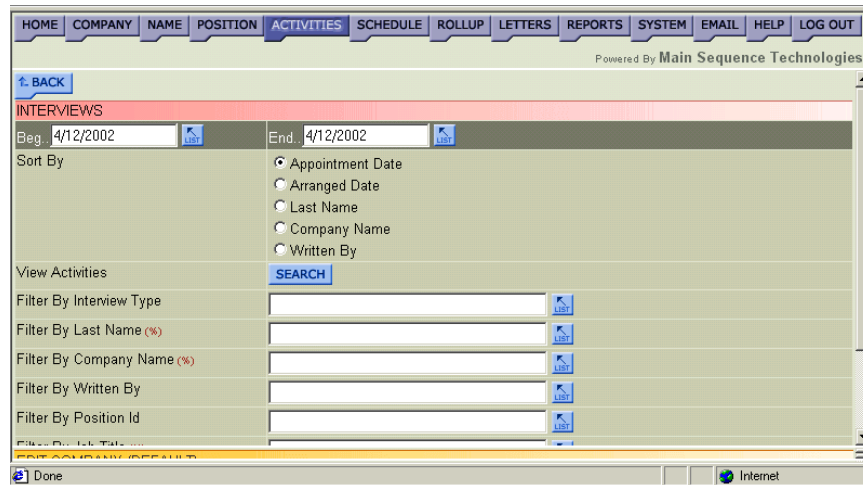
Viewing Interviews

You can view a list of all interviews or interviews for a specific company or name from the Interviews frame. From this frame you can also group interviews in a Rollup List and print an Interview Report.

Procedure 5-3   Viewing Interviews

1. Click the purple **Activities** button in the Browser header.

   The View Activities frame is displayed (Figure 5-1 on page 5-2).

2. Click the **View Interviews** link.

The Interviews frame is displayed.

Figure 5-18

3. In the Beg and End text boxes, specify the time range for which you want to view interviews. Type the dates or do the following:

- Click the corresponding **List** button to display the Select Date and Time window (Figure 5-3 on page 5-3).

- Use the provided controls to set a new date and click **OK**.

You are returned to the Interviews frame and your selections are displayed in the provided text boxes.

4. Choose one of the following sort options:

- **Appointment Date.** Choose this option to sort matches by the date of the interview.

- **Arranged Date.** Choose this option to sort matches by the date the interviews were set up.

- **Last Name.** Choose this option to sort matches by last name of the person with which the interview is associated.

- **Company Name.** Choose this option to sort matches by the name of the company with which the interview is associated.

- **Written By.** Choose this option to sort matches by the user name of the person who set up the interview.

5. Do one of the following:

- If you want to define your criteria further, go to Step 6.

- If you want to run the query, click **Search**.

  Name activities generated during the time period specified are returned.

6. If you want to filter your activities by Interview Type, do the following:

*   Click the corresponding **List** button to display the Dropdown List window.
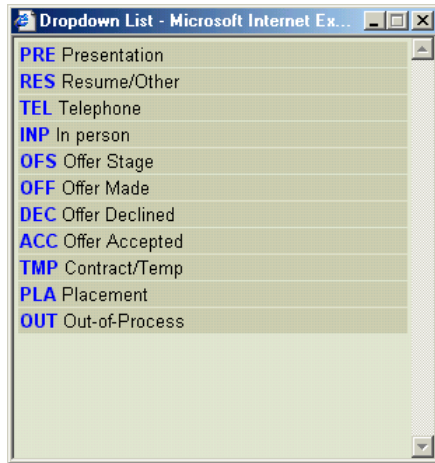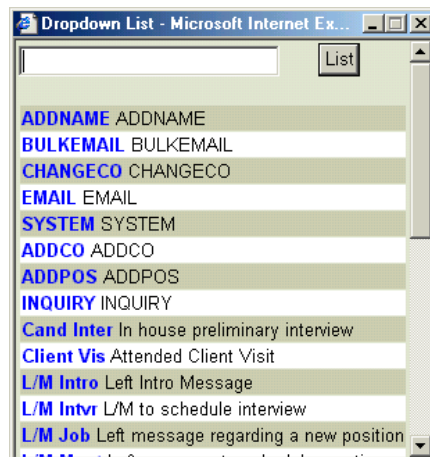

Figure 5-19

*   Click the desired type.

    You are returned to the Interviews frame and your selection is displayed in the Filter by Interview Type text box.

7. If you want to filter your activities by Last Name, do the following:

*   Click the corresponding **List** button to display the Dropdown List window.

*   Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 5-20

- Click the desired name.

  You are returned to the Interviews frame and your selection is displayed in the Filter by Last Name text box.

8. If you want to filter your activities by Company Name, do the following:

   - Click the corresponding **List** button to display the Dropdown List window.

   - Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 5-21

   - Click the desired name.

     You are returned to the Interviews frame and your selection is displayed in the Filter by Company Name text box.

9. If you want to filter your activities by the user name of the person who set up the interview, do the following:

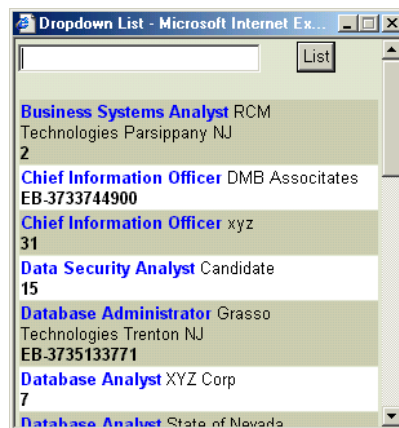   - Click the Written By **List** button to display the Dropdown List window.
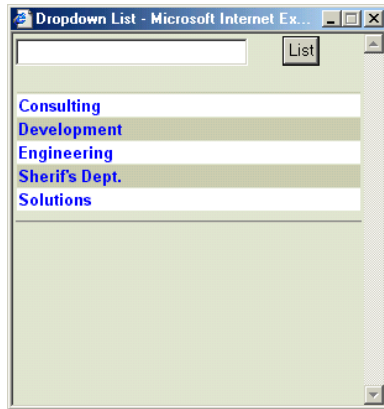

Figure 5-22

- Click the desired name.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Interviews frame and your selection is displayed in the Filter by Written By text box.

10. If you want to filter your activities by Position ID, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

Figure 5-23

- Click the desired ID.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Interviews frame and your selection is displayed in the Filter by Position ID text box.

11. If you want to filter your activities by Job Title, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

Figure 5-24

- Click the desired title.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Interviews frame and your selection is displayed in the Filter by Job Title text box.

12. If you want to filter your activities by Department, do the following:

- Click the corresponding **List** button to display the Dropdown List window.
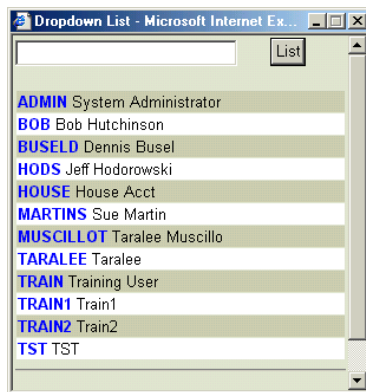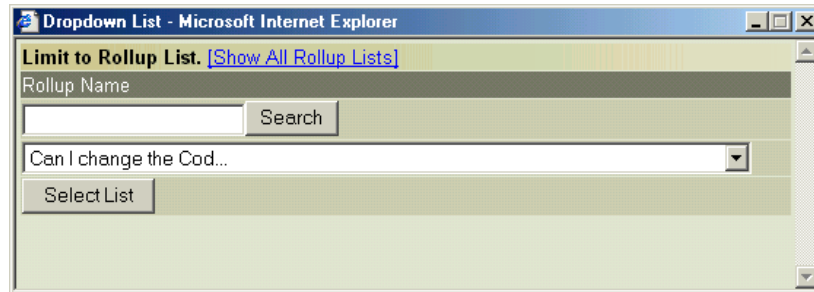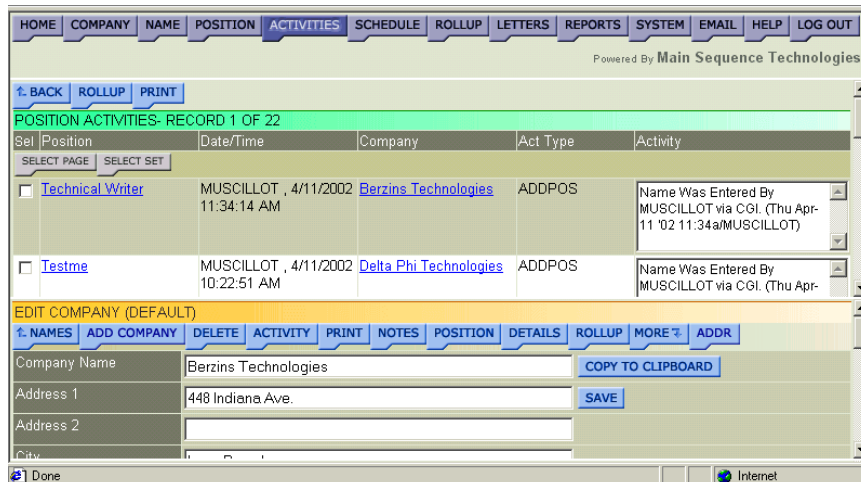

Figure 5-25

- Click the desired department.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Interviews frame and your selection is displayed in the Filter by Department text box.

13. If you want to filter your activities by Status, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

Figure 5-26

- Click the desired Status.

  > **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

  You are returned to the Interviews frame and your selection is displayed in the Filter by Status text box.

- Select the Show Most Recent Status check box to display activities whose last known state is the status specified.

14. Click **Search**.

   Interviews matching your criteria are returned for the time period specified.

Figure 5-27

15. If desired, do one of the following:

   - To add one or more interviews to a Rollup List, select the corresponding check boxes of the interviews you want to add to the same list and click **Rollup**.

     Read Adding Items to Existing Rollup Lists in Chapter 7 for further details.

   - To generate an Interview Report, click **Print**.
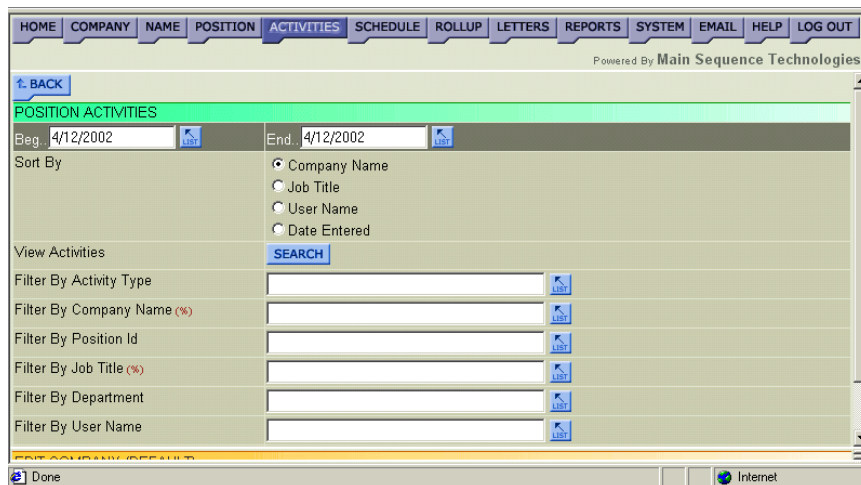
Figure 5-28

Viewing Position Activities

You can view a list of activities for all positions or for a specific position from the Position Activities frame. You can also view a list of position activities for a specific job title, department, or Rollup List. From the Position Activities frame you can also group activities in a Rollup List and print a Position Activity Report.

Procedure 5-4   Viewing Position Activities

1. Click the purple **Activities** button in the Browser header.

    The View Activities frame is displayed (Figure 5-1 on page 5-2).

2. Click the **View Position Activities** link.

    The Position Activities frame is displayed.

Figure 5-29

3. In the Beg and End text boxes, specify the time range for which you want to view position activities. Type the dates or do the following:

- Click the corresponding **List** button to display the Select Date and Time window (Figure 5-3 on page 5-3).

- Use the provided controls to set a new date and click **OK**.

You are returned to the Position Activities frame and your selections are displayed in the provided text boxes.

4. Choose one of the following sort options:

- **Company Name.** Choose this option to sort matches by the name of the company with which the activity is associated.

- **Job Title.** Choose this option to sort matches by the job title with which the activity is associated.

- **User Name.** Choose this option to sort matches by the user name of the person who created the activity.

- **Date Entered.** Choose this option to sort matches by the date they were entered in the system.

5. Do one of the following:

- If you want to define your criteria further, go to Step 6.

- If you want to run the query, click **Search**.

Name activities generated during the time period specified are returned.

6. If you want to filter your activities by Activity Type, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

Figure 5-30

- Click the desired type.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Position Activities frame and your selection is displayed in the Filter by Activity Type text box.

7. If you want to filter your activities by Company Name, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

- Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 5-31

- Click the desired name.

You are returned to the Position Activities frame and your selection is displayed in the Filter by Company Name text box.

8. If you want to filter your activities by Position ID, do the following:

- Click the corresponding **List** button to display the Dropdown List window.
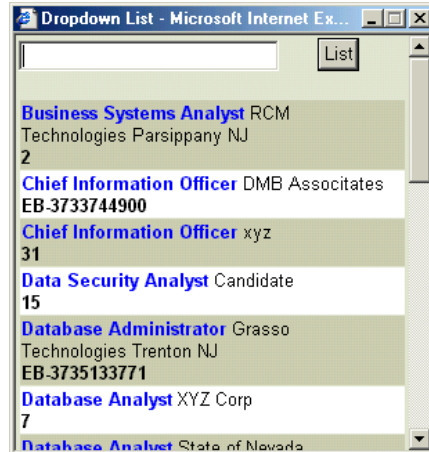
Figure 5-32

- Click the desired ID.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Position Activities frame and your selection is displayed in the Filter by Position ID text box.

9. If you want to filter your activities by Job Title, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

Figure 5-33

- Click the desired title.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Position Activities frame and your selection is displayed in the Filter by Job Title text box.

10. If you want to filter your activities by Department, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

Figure 5-34

- Click the desired department.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Position Activities frame and your selection is displayed in the Filter by Department text box.

11. If you want to filter your activities by User Name, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

Figure 5-35

- Click the desired name.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Position Activities frame and your selection is displayed in the Filter by User Name text box.

12. If you want to filter your activities by Rollup List, do the following:

- Click the corresponding **List** button to display the Limit to Rollup List frame in the Dropdown List window.

Figure 5-36

- If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

- From the provided list box, select the desired Rollup List name.

  Tip: To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

- Click **Select List.**

  You are returned to the Position Activities frame and your selection is displayed in the Filter by Rollup List text box.

13. Click **Search**.

   Position activities matching your criteria are returned for the time period specified.

Figure 5-37

14. If desired, do one of the following:

- To add one or more activities to a Rollup List, select the corresponding check boxes of the activities you want to add to the same list and click **Rollup**.

  Read Adding Items to Existing Rollup Lists in Chapter 7 for further details.

- To generate a Position Activity Report, click **Print**.

Figure 5-38

Viewing All Contractor/Temp Candidates

You can view a list of contractors that are available on a particular date from the List All Contractors/Temps frame. This frame contains contractor status, work dates, and bill and pay rates.

Procedure 5-5   Viewing All Contractor/Temp Candidates

1. Click the purple **Activities** button in the Browser header.

   The View Activities frame is displayed (Figure 5-1 on page 5-2).

2. Click the **Contract/Temp Activities** link.

   The Contract/Temp Menu frame is displayed.

Figure 5-39

3. Click the **List All Contractors/Temps** link.

    The List All Contractors/Temps frame is displayed.

Figure 5-40

4. In the Search Date text box, specify the date for which you want to view available contractors. Type the date or do the following:

    - Click the corresponding **List** button to display the Select Date and Time window (Figure 5-3 on page 5-3).

    - Use the provided controls to set a new date and click **OK**.

    You are returned to the List All Contractors/Temps frame and your selection is displayed in the Select Date text box.

5. If you want to filter your activities by Last Name, do the following:

    - Click the corresponding **List** button to display the Dropdown List window.

    - Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 5-41

- Click the desired name.

  You are returned to the List All Contractors/Temps frame and your selection is displayed in the Filter by Last Name text box.

6. If you want to filter your Contractors/Temps by Rollup List, do the following:

   - Click the corresponding **List** button to display the Limit to Rollup List frame in the Dropdown List window.
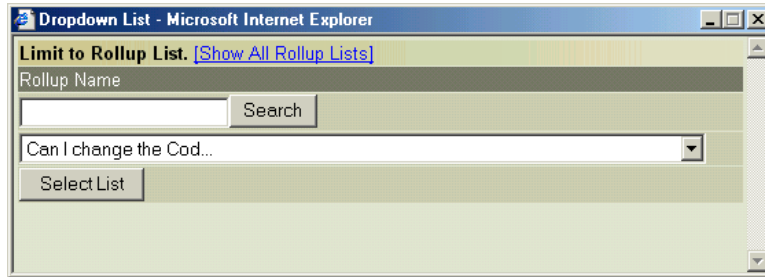
Figure 5-42

- If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

- From the provided list box, select the desired Rollup List name.

  > **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

- Click **Select List.**

  You are returned to the List All Contractors/Temps frame and your selection is displayed in the Filter by Rollup List text box.

7. Click **Search**.

   A list of all available contractors and temporary employees are displayed for the date specified.
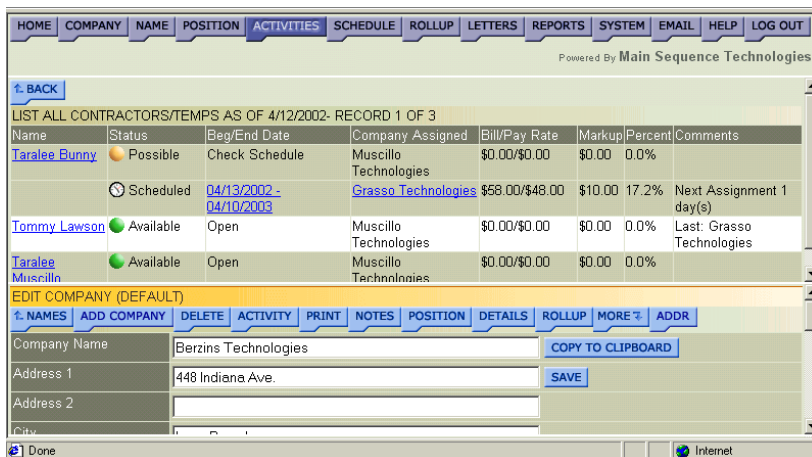
Figure 5-43

Viewing Contractors/Temps on Assignment

You can view a list of contractors that are on assignment for a particular date from the List All Contractors/Temps Currently on Assignment frame. This frame contains contractor status, work dates, assigned company, bill/pay rates, markups and/or commission percentage.

Procedure 5-6   Viewing Contractors/Temps on Assignment

1. Click the purple **Activities** button in the Browser header.

   The View Activities frame is displayed (Figure 5-1 on page 5-2).

2. Click the **Contract/Temp Activities** link.

   The Contract/Temp Menu frame is displayed (Figure 5-39 on page 5-25).

3. Click the **List All Contractors/Temps Currently on Assignment** link.

   The List All Contractors/Temps Currently on Assignment frame is displayed.

Figure 5-44

4. In the Search Date text box, specify the date for which you want to view assigned contractors. Type the date or do the following:

   • Click the corresponding **List** button to display the Select Date and Time window (Figure 5-3 on page 5-3).

   • Use the provided controls to set a new date and click **OK**.

   You are returned to the List All Contractors/Temps Currently on Assignment frame and your selection is displayed in the Select Date text box.

5. If you want to filter your activities by Last Name, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

- Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 5-45

- Click the desired name.

You are returned to the List All Contractors/Temps Currently on Assignment frame and your selection is displayed in the Filter by Last Name text box.

6. If you want to filter your activities by Assigned Company Name, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

- Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 5-46

- Click the desired name.

  You are returned to the List All Contractors/Temps Currently on Assignment frame and your selection is displayed in the Filter by Assigned Company Name text box.

7. If you want to filter your contractors/Temps by Rollup List, do the following:

   - Click the corresponding **List** button to display the Limit to Rollup List frame in the Dropdown List window.
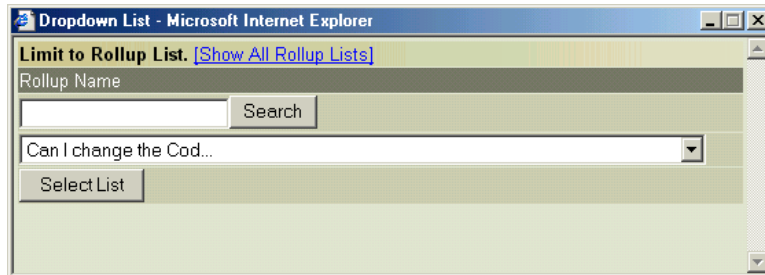
Figure 5-47

   - If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

   - From the provided list box, select the desired Rollup List name.

     Tip: To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

   - Click **Select List**.

     You are returned to the List All Contractors/Temps Currently on Assignment frame and your selection is displayed in the Filter by Rollup List text box.

8. Click **Search**.

A list of all contractors and temporary employees on assignment are displayed for the date specified.

Figure 5-48

Using the Schedule

What You'll Find in This Chapter

This chapter explains how to use the Schedule. It explains how to view, add, edit, and delete scheduled activities. This chapter also explains how to export scheduled activities from PCRecruiter to Microsoft Outlook. Refer to the following table for a description of the sections you will find in this chapter.

Table 6-1 What You'll Find in Chapter 6

If you want to…	Read…
View scheduled activities for a specific day or person, or display a detailed monthly view of activities,	Viewing Scheduled Activities on page 6-2.
Add a new activity to the schedule,	Adding a Scheduled Activity on page 6-4.
Change a scheduled activity description or status or move a scheduled activity to a different date and time,	Editing Scheduled Activities on page 6-7.
View a thumbnail sketch of the current day that displays everyone's scheduled time,	Viewing Group Appointments on page 6-12.
Export scheduled activities from PCRecruiter to Microsoft Outlook,	Exporting Scheduled Activities on page 6-14.
Remove activities from the Schedule,	Deleting Scheduled Activities on page 6-16.

Viewing Scheduled Activities

Using the Schedule feature, you can view all user- scheduled activities. You can:

- View a thumbnail sketch of the month for a particular person in the Scheduling frame.

- View a list of scheduled activities for a particular day and person from the Schedule frame.

- Display a detailed monthly view for a particular person in a new browser window.

Procedure 6-1   Viewing Scheduled Activities

1. Click the purple **Schedule** button from the Browser header.

   The Scheduling frame is displayed.
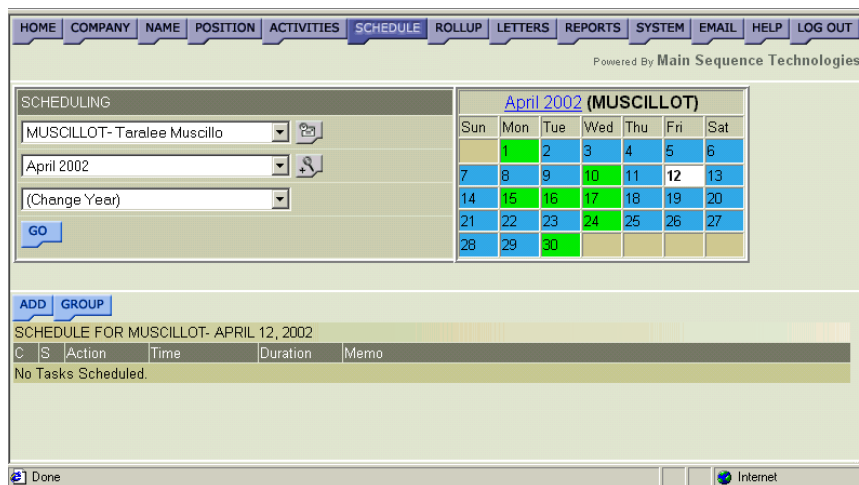
Figure 6-1

2. From the provided list box, select the user name of the person whose schedule you want to view.

3. From the provided list box, select the month whose scheduled activities you want to view.

4. If necessary, use the provided list box to change the current year.

5. Click **Go**.

   The Calendar is updated with the selected user, month, and year. Days on which appointments are scheduled are highlighted green.

6. To view a list of all appointments scheduled in the current month, click the **month year** link. For example, in Figure 6-1, click **April 2002**.

    All activities scheduled in the current month are displayed in the bottom frame.
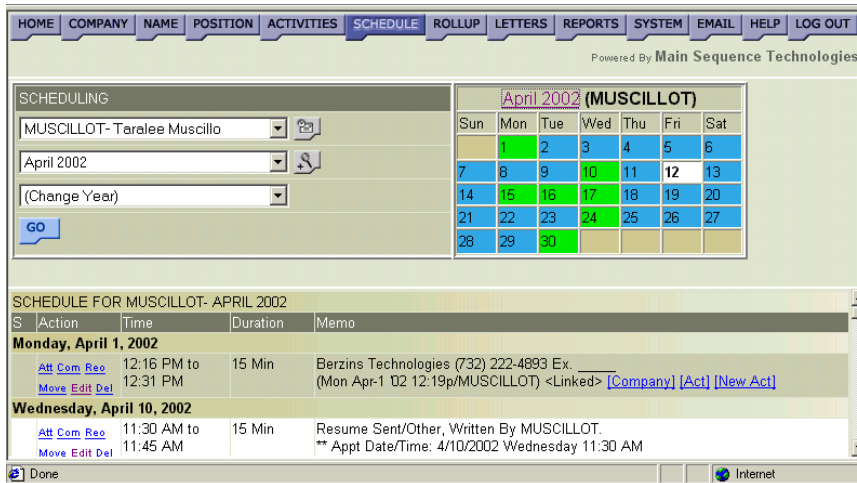
Figure 6-2

7. To view a list of appointments scheduled on a particular day, double-click the day. All days highlighted green contain appointments.

    All activities scheduled on the current day are displayed in the bottom frame.
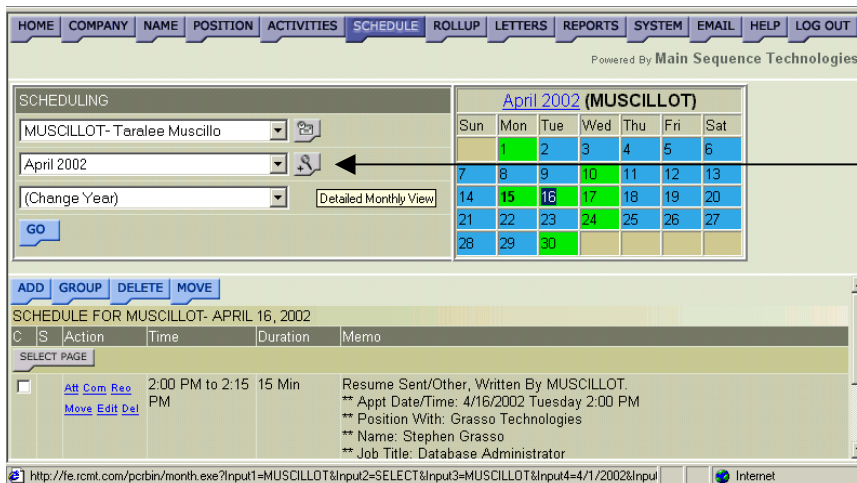
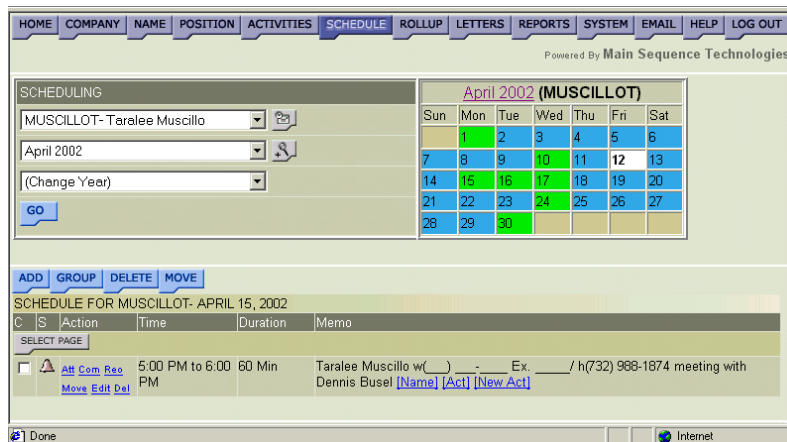**Figure 6-3**

8. To view a detailed monthly view of appointments, click the **Detailed Monthly View** button (illustrated in Figure 6-3).

A detailed view of the month is launched in a new browser window.
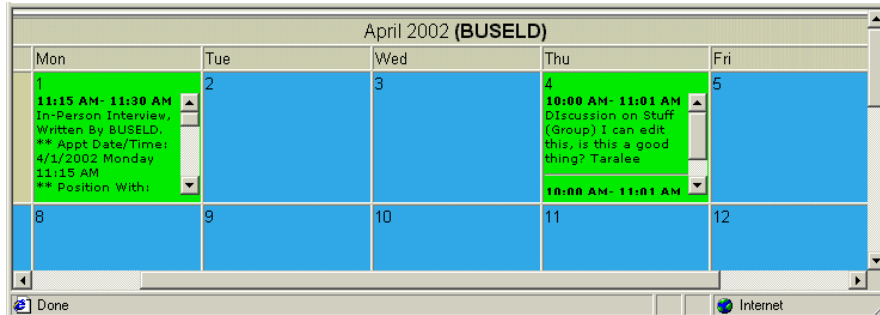
Figure 6-4

Adding a Scheduled Activity

Activities that are associated to companies, names, and positions can be copied to the Schedule as a Scheduled Activity when you are adding the company, name, or position activity as illustrated in Figure 6-5.

Figure 6-5

In addition, you can manually add activities to the Schedule through the Add an Appointment frame.

Procedure 6-2   Adding a Scheduled Activity

1. Click the purple **Schedule** button from the Browser header.

The Scheduling frame is displayed (Figure 6-1 on page 6-2).

2. From the provided list box, select the user name of the person for which you want to add a scheduled activity.

3. From the provided list box, select the month in which you want to add a scheduled activity.

4. If necessary, use the provided list box to change the current year.

5. Click **Go**.

   The Calendar is updated with the selected user, month, and year. Days on which appointments are scheduled are highlighted green.

6. Double-click the day containing the activity whose status you want to update. All days highlighted green contain appointments.

   All activities scheduled on the current day are displayed in the bottom frame.
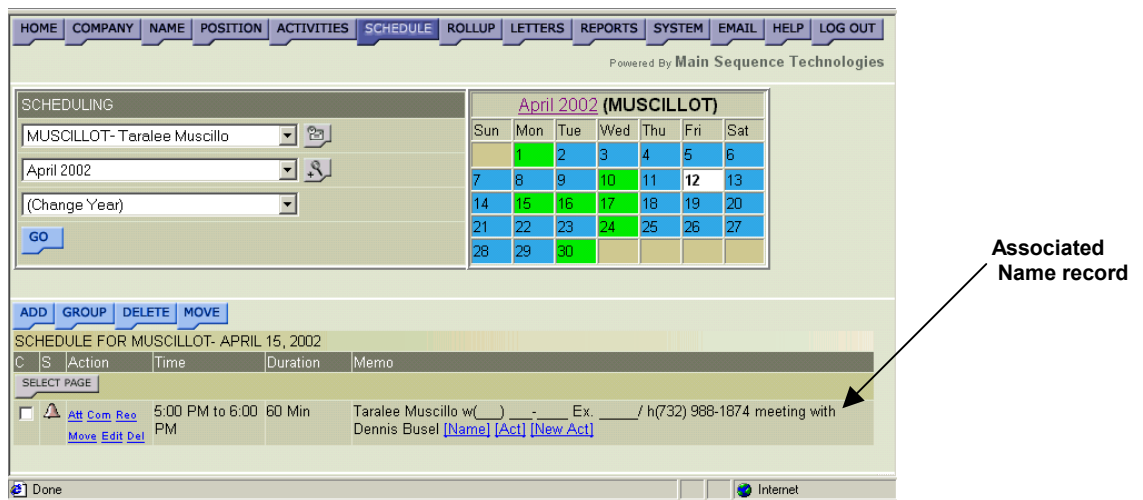
Figure 6-6

7. Click the blue **Add** button.

   The Add an Appointment frame is displayed.
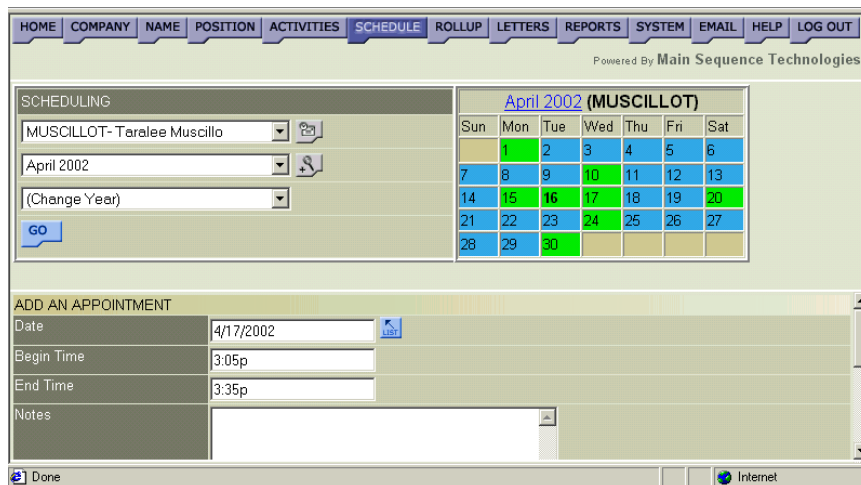
Figure 6-7

8. If necessary, in the provided text box, change the date of the new appointment.

9. In the provided text boxes, indicate the time the appointment begins and ends.

10. In the Notes text box, type a description of the appointment.

11. Indicate whether the appointment is recurring. Do the following:

    - From the provided list box, indicate how often the appointment should recur (e.g., daily, weekly, monthly, yearly).

    - In the provided text box, indicate how many times the appointment should recur.

12. Indicate the record to which you want to associate the appointment. Do the following:

    - From the Link to Record list box, indicate the type of record you want to associate with the activity (e.g., company, name, or position).

    - Click the corresponding **List** button to display the Dropdown List window.

    - Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

    - Click the desired name.

    You are returned to the Add an Appointment frame and your selection is displayed in the Record Selected text box. The selected record and contact information will display in the Scheduled Activity Memo field as illustrated in Figure 6-6.

13. Configure Alarm options; do the following:

    - Select the Add Reminder Alarm check box.

    - From the provided list, indicate when the alarm should be generated (options range from 15 minutes to 3 days).

14. Click **Save**.

    The scheduled activity is saved and you are returned to the previous schedule frame. The new scheduled activity is displayed.

Editing Scheduled Activities

Through the Edit Appointment window you can move a scheduled activity to a different date and time, edit the activity description, and configure alarm options.

> If the scheduled activity was not added through the Add an Appointment frame but copied to the schedule from an Add Activity window (similar to Figure 6-5 on page 6-4), then the information is only changed on the schedule. The related company, name, or position activity is not changed.

Procedure 6-3 Editing Scheduled Activities

1. Click the purple **Schedule** button from the Browser header.

   The Scheduling frame is displayed (Figure 6-1 on page 6-2).

2. From the provided list box, select the user name of the person for which you want to edit a scheduled activity.

3. From the provided list box, select the month in which you want to edit a scheduled activity.

4. If necessary, use the provided list box to change the current year.

5. Click **Go**.

   The Calendar is updated with the selected user, month, and year. Days on which appointments are scheduled are highlighted green.

6. Double-click the day containing the activity you want to edit. All days highlighted green contain appointments.

   All activities scheduled on the current day are displayed in the bottom frame.
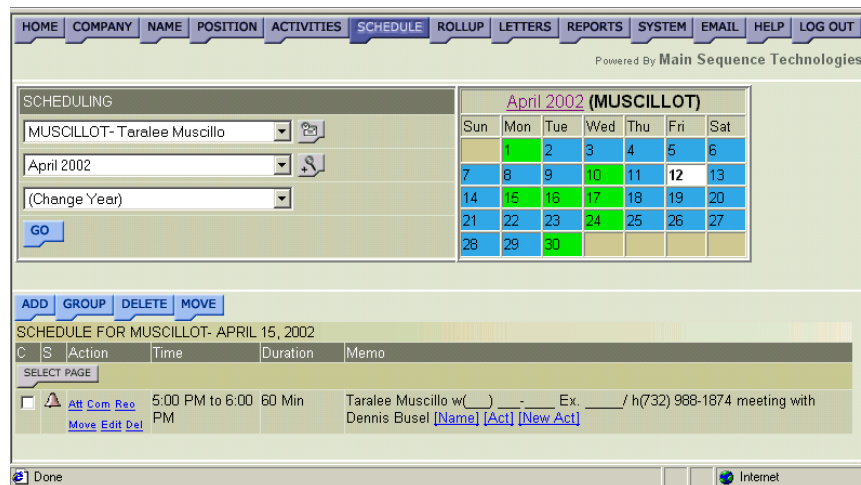
Figure 6-8

7. Click the corresponding **Edit** link.

   The Edit Appointment frame is displayed in the Scheduling window.
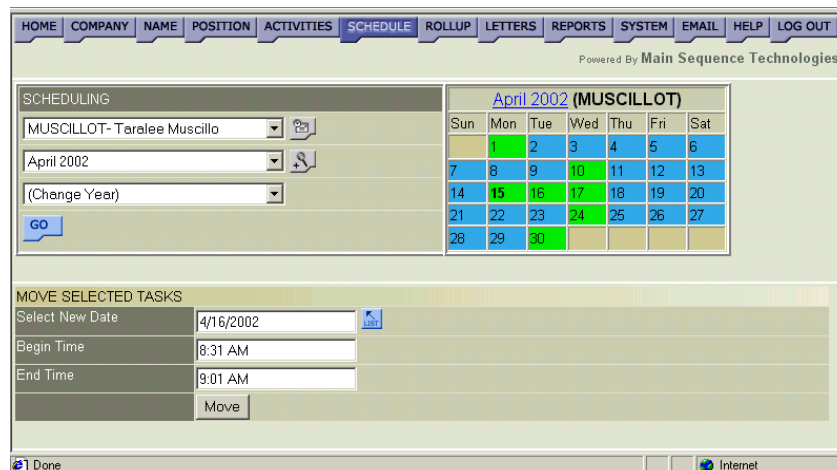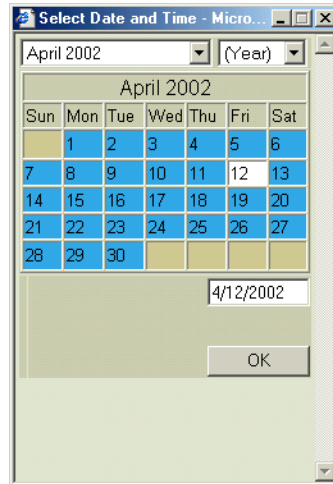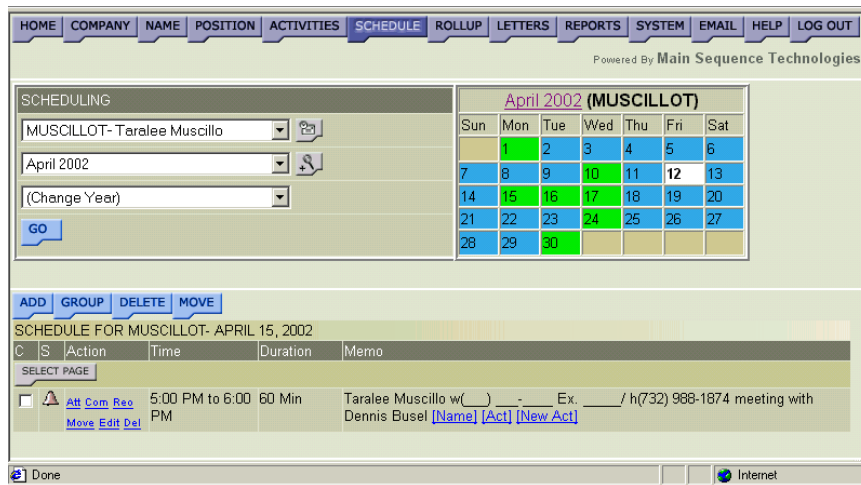

Figure 6-9

8. In the provided text box, change the appointment date. Do the following:

   - Click the corresponding **List** button to display the Select Date and Time window.

Figure 6-10

   - Use the provided controls to set a new date and click **OK**.

   You are returned to the Edit Appointment frame and your selections are displayed in the Date text box.

9. In the provided text boxes, change the time the appointment begins and ends.

10. In the Notes text box, change the appointment description.

11. Change the Alarm options; do the following:

- Select the Add Reminder Alarm check box.

- From the provided list, indicate when the alarm should be generated (options range from 15 minutes to 3 days).

12. Click **Save**.

The Calendar is updated and the appointment record is updated.

Updating Scheduled Activity Status

Through the Scheduled frame you can change the activity status to Completed or Attempted.

Procedure 6-4   Updating Scheduled Activity Status

1. Click the purple **Schedule** button from the Browser header.

   The Scheduling frame is displayed (Figure 6-1 on page 6-2).

2. From the provided list box, select the user name of the person whose activity status you want to update.

3. From the provided list box, select the month containing the scheduled activity whose status you want to update.

4. If necessary, use the provided list box to change the current year.

5. Click **Go**.

   The Calendar is updated with the selected user, month, and year. Days on which appointments are scheduled are highlighted green.

6. Double-click the day containing the activity you want to update. All days highlighted green contain appointments.

   All activities scheduled on the current day are displayed in the bottom frame.

Figure 6-11

7. Do one of the following:

   *   Click the corresponding **Att** link to change the scheduled activity status to Attempted indicated by a blue circle.

   *   Click the corresponding **Com** link to change the scheduled activity status to Completed indicated by a red circle with a line through it.

   *   Click the corresponding **Reo** link to reopen the scheduled activity indicated by the absence of an icon.

   An Icon is displayed in the S column indicating the scheduled activity status.

Figure 6-12

Moving Scheduled Activities

Through Move Scheduled Tasks frame you can move a scheduled activity to a different date and time.

> If the scheduled activity was not added through the Add an Appointment frame but copied to the schedule from an Add Activity window (similar to Figure 6-5 on page 6-4), then the information is only changed on the schedule. The related company, name, or position activity is not changed.

Procedure 6-5   Moving Scheduled Activities

1. Click the purple **Schedule** button from the Browser header.

   The Scheduling frame is displayed (Figure 6-1 on page 6-2).

2. From the provided list box, select the user name of the person for which you want to move a scheduled activity.

3. From the provided list box, select the month in which you want to move a scheduled activity.

4. If necessary, use the provided list box to change the current year.

5. Click **Go**.

   The Calendar is updated with the selected user, month, and year. Days on which appointments are scheduled are highlighted green.

6. Double-click the day containing the activity you want to move. All days highlighted green contain appointments.

   All activities scheduled on the current day are displayed in the bottom frame.
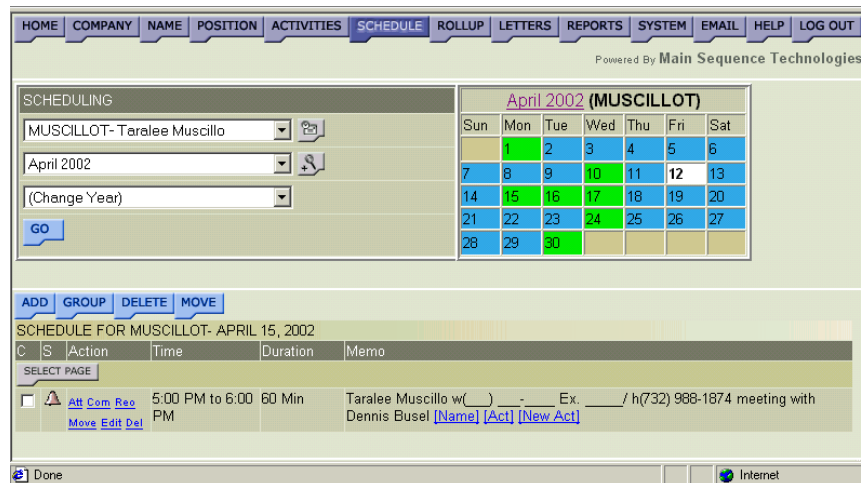
Figure 6-13

7. Do one of the following:

   • Click the corresponding **Move** link.

   • Click the corresponding check box of the scheduled activity you want to move and click **Move**.

   The Move Scheduled Tasks frame is displayed.

Figure 6-14

8. In the provided text box, change the appointment date. Do the following:

- Click the corresponding **List** button to display the Select Date and Time window.

Figure 6-15

- Use the provided controls to set a new date and click **OK**.

You are returned to the Move Selected Tasks frame and your selections are displayed in the Select New Date text box.

9. In the provided text boxes, change the time the appointment begins and ends.

10. Click **Move**.

The Calendar is updated and the appointment is moved to the specified date and time.

Viewing Group Appointments

From the Group View frame, you can view scheduled time periods for all users. Scheduled time is highlighted in red. In addition, from this frame you can also view the previous day's and next day's scheduled activities as well as add a new scheduled activity.

Procedure 6-6   Viewing Group Appointments

1. Click the purple **Schedule** button from the Browser header.

The Scheduling frame is displayed (Figure 6-1 on page 6-2).

2. From the provided list box, select the user name of the person whose activity you want to view.

3. From the provided list box, select the month containing the scheduled activities you want to view.

4. If necessary, use the provided list box to change the current year.

5. Click **Go**.

   The Calendar is updated with the selected user, month, and year. Days on which appointments are scheduled are highlighted green.

6. Double-click the day containing the activities you want to view. All days highlighted green contain appointments.

   All activities scheduled on the current day are displayed in the bottom frame.

Figure 6-16

7. Click **Group**.

   A thumbnail sketch of the selected day is displayed. Time periods containing appointments are highlighted red.
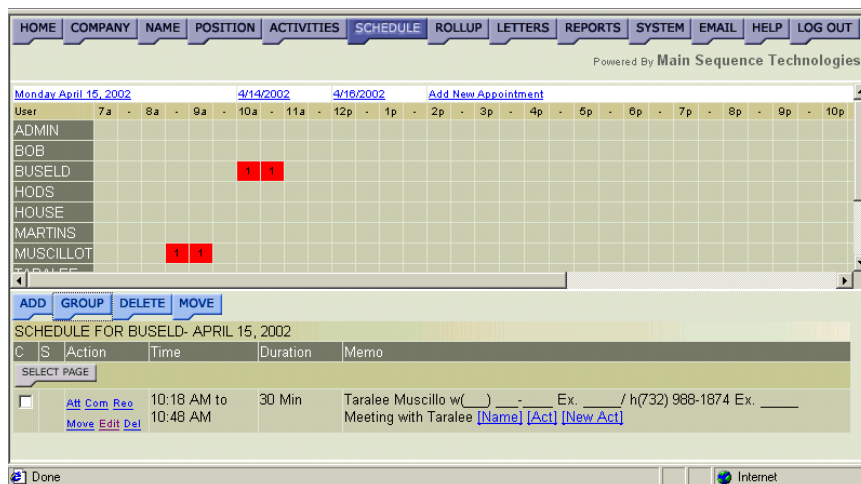
Figure 6-17

8. Double-click the appointment to view its details.

9. The selected appointment's details are displayed in the bottom frame (as illustrated in Figure 6-17).

10. If desired, do one of the following from the Group View frame:

- Click the provided date links to view the group schedule for the day before or the day after the current date.

- Click the **Add New Appointment** link to add a new appointment.

  Read Adding a Scheduled Activity on page 6-4 for further details.

Exporting Scheduled Activities

You can export any user's scheduled activities from PCRecruiter to your Microsoft Outlook Schedule. However, activities are only copied to your Outlook Schedule, they are never deleted or edited.

For example, if you move all your Monday appointments to Tuesday in PCRecruiter and then export your scheduled activities to Outlook, your appointments will display on both Monday and Tuesday.

Procedure 6-7   Exporting Scheduled Activities

1. Click the purple **Schedule** button from the Browser header.

   The Scheduling frame is displayed.
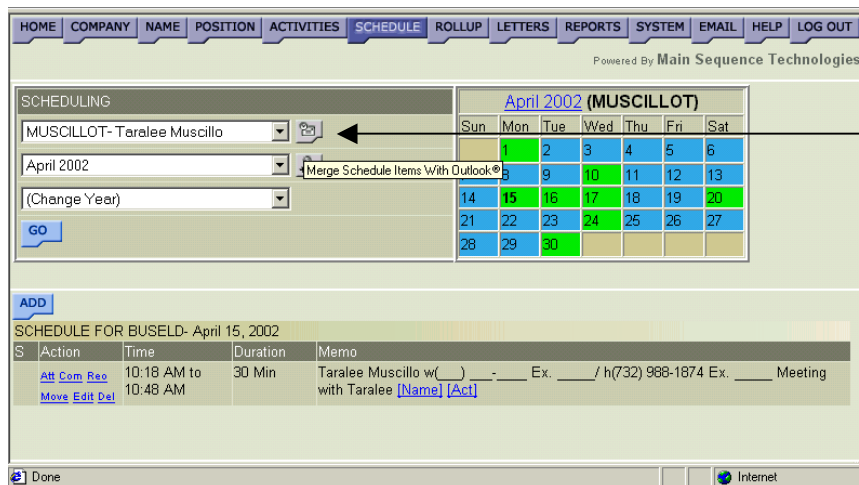
Figure 6-18

2. From the provided list box, select the user name of the person whose activities you want to export to your Outlook calendar.

3. From the provided list box, select the month containing the activities you want to export.

4. If necessary, use the provided list box to change the current year.

5. Click **Go**.

    The Calendar is updated with the selected user, month, and year. Days on which appointments are scheduled are highlighted green.

6. Click the **Export** button (illustrated in Figure 6-18).

    The Export to Outlook window is displayed.
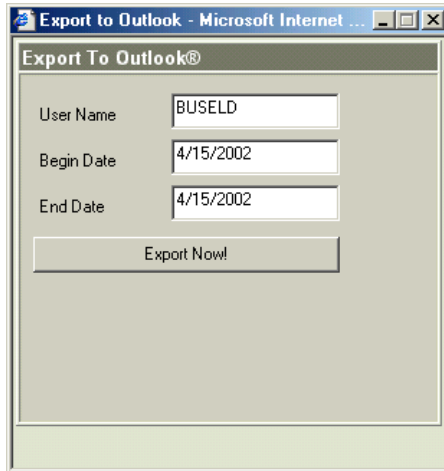
Figure 6-19

7. In the provided text boxes, indicate the time period for which you want to export scheduled activities.

8. Click **Export Now**.

    The activities are added to your Outlook Schedule and a completed status bar is displayed in the Export to Outlook window.
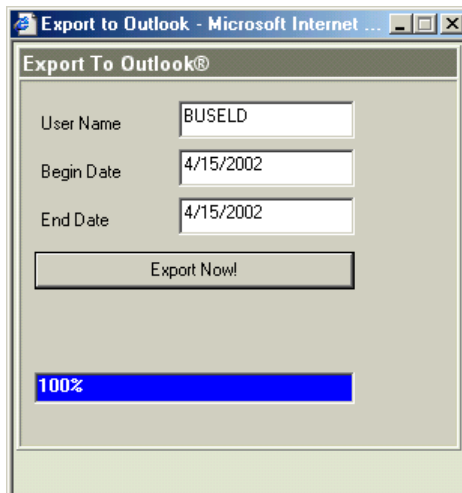
Figure 6-20

9. Close the Export to Outlook window to return to the Scheduling frame.

Deleting Scheduled Activities

You can delete activities from the Schedule for any user.

> If the scheduled activity was not added through the Add an Appointment frame but copied to the schedule from an Add Activity window (similar to Figure 6-5 on page 6-4), then the information is only deleted on the schedule. The related company, name, or position activity is not completely deleted from the database.

Procedure 6-8   Deleting Scheduled Activities

1. Click the purple **Schedule** button from the Browser header.

    The Scheduling frame is displayed.
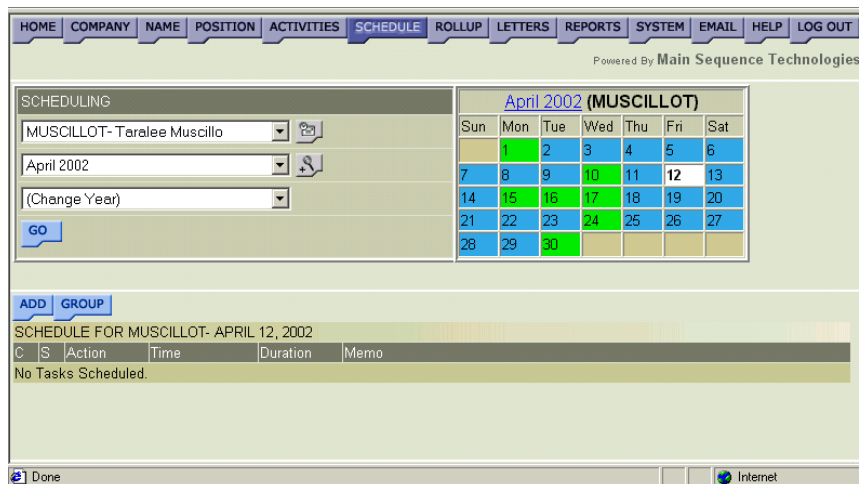
Figure 6-21

2. From the provided list box, select the user name of the person whose activity you want to delete.

3. From the provided list box, select the month containing the scheduled activity you want to delete.

4. If necessary, use the provided list box to change the current year.

5. Click **Go**.

    The Calendar is updated with the selected user, month, and year. Days on which appointments are scheduled are highlighted green.

6. Double-click the day containing the activity you want to delete. All days highlighted green contain appointments.

    All activities scheduled on the current day are displayed in the bottom frame.
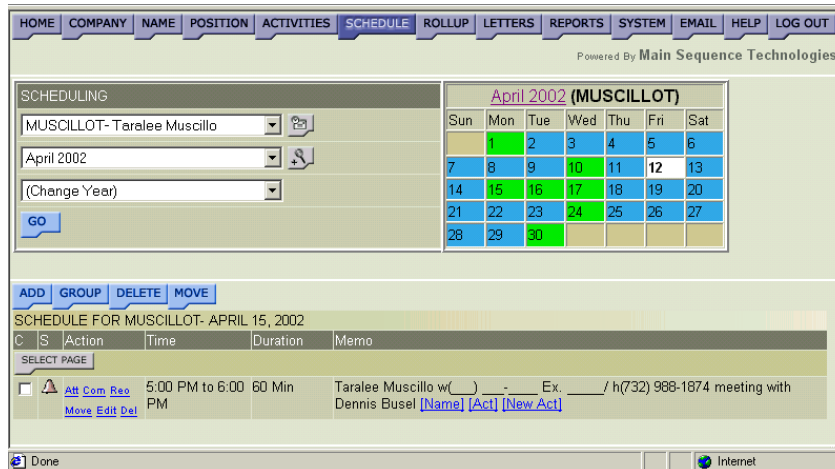
Figure 6-22

7. Do one of the following:

    - Click the corresponding **Del** link to delete the scheduled activity.

    - Click the corresponding check boxes of the scheduled activities you want to delete and click **Delete**.

    A confirmation prompt is displayed.
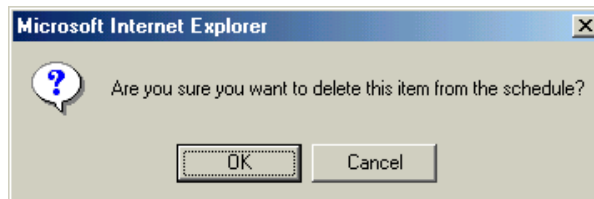
Figure 6-23

8. Click **OK** to confirm the deletion.

    The calendar is updated and the selected activity is removed from the schedule.

7

Working With Rollup Lists

What You'll Find in This Chapter

This chapter describes Rollup Lists and how to create them. It also describes how to add, copy, move, and delete items from Rollup Lists.

In addition, this chapter explains how to view Rollup List item activities and how to add new activities to Rollup List items. Refer to the following table for a description of the sections you will find in this chapter.

Table 7-1 What You'll Find in Chapter 7

If you want to…	Read…
View your own Rollup Lists or Rollup Lists that are available to all users,	Viewing Rollup Lists on page 7-2.
Generate a Summary report listing the Items in a Rollup List,	Generating Rollup List Reports on page 7-4.
View Rollup List item activities, add an activity to a Rollup List item, or generate a Rollup List Item Activity report,	Working with Rollup Activities on page 7-5.
Create a new Rollup List to which you can add companies, names, positions, and activities,	Creating Rollup Lists on page 7-12.
Change the Rollup List properties such as the Rollup List Owner or availability,	Editing Rollup List Properties on page 7-17.
Add one or more company, name, or position items to a Rollup List,	Adding Items to Existing Rollup Lists on page 7-19.
Move one or more items from one Rollup List to another Rollup List,	Moving List Items to Another List on page 7-21.
Copy one or more items from one Rollup List to another Rollup List,	Copying List Items to Another List on page 7-24.
Delete one or more items from a Rollup List,	Deleting Rollup List Items on page 7-27.

If you want to…	Read…
Remove a Rollup List from the database,	Deleting Rollup Lists on page 7-28.

Viewing Rollup Lists

There are two types of Rollup Lists, those that are shared and those that are not. All users can view and edit Rollup Lists that are **shared**.

Depending on the number of Rollup Lists, you may have difficulty finding the one you want to view. When you want to find a particular list you can use the Search Lists feature.

Procedure 7-1   Viewing Rollup Lists

1. Click the purple **Rollup** button from the Browser header.

   The View Rollup Lists frame is displayed. All Rollup Lists for which you are an owner are displayed.
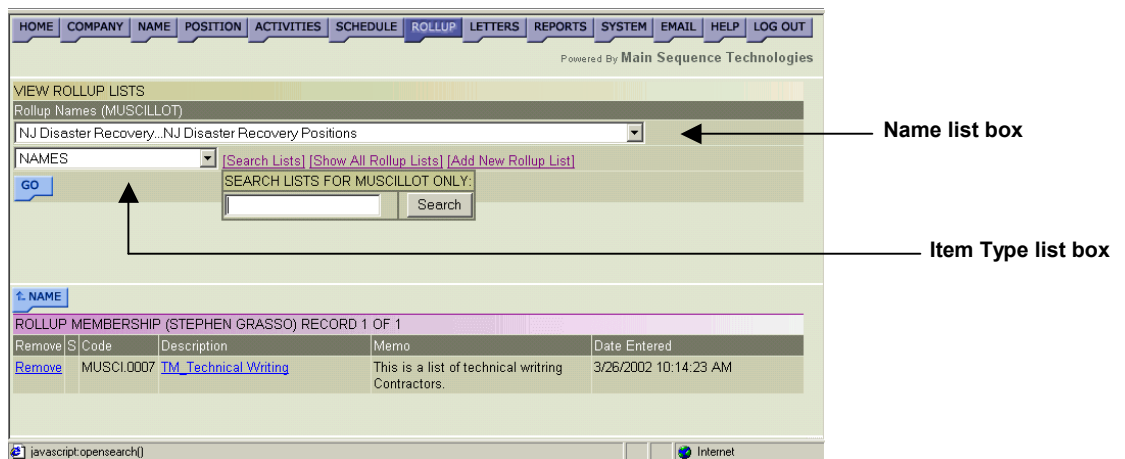
Figure 7-1

2. Do one of the following:

   - If the Rollup List you want to view is not displayed, click **[Show All Rollup Lists]**.

     All Shared Rollup Lists are added to your Rollup Lists.

   - If the Rollup List you want to view is displayed, go to Step 3.

3. From the Name list box, select the name of the Rollup List you want to view.

    > **Tip:** Use the Search Lists feature to quickly locate an entry in the Name list box. In the Search Lists popup, type the name or the first few letters of the name of the Rollup List you want to find and click **Search**. The first Rollup List matching your criteria is selected in the Name list box.

4. From the Item Type list box, select the type of items you want to view in the selected Rollup list (e.g., companies, names, or positions).

5. Click **Go**.

    The selected Rollup List and items are displayed in the Rollup List frame.

Figure 7-2

6. If desired, do one or more of the following:

    *   Click the blue **Back** button to display the previous frame.

    *   Click the blue **Clear** button to delete all displayed items from the Rollup List.

        Read Deleting Rollup List Items on page 7-27 for further details.

    *   Click the blue **Search** button to launch the Advanced Search Utility.

        To learn more about the Search Utility, read Chapter 4, Performing Searches.

    *   Click the blue **Add Activity** button to add an activity to the rollup item.

        Read Adding Activities to Rollup List Items on page 7-7 for further details.

- Click the blue **Print** button to generate a Summary Report of the information listed in the Rollup List frame.

  Read Generating Rollup List Reports on page 7-4 for further details.

Generating Rollup List Reports

You can generate a Summary Report from the Rollup List frame. When you generate the report, it is opened in a new browser window. From the new browser window you can print the report to your network printer or save it to your local or network drive.

Note: PCRecruiter contains a complete reporting tool. To learn more, read Chapter 8, Generating Reports.

Procedure 7-2   Generating Rollup List Reports

1. Click the purple **Rollup** tab from the Browser header.

   The View Rollup Lists frame is displayed. All Rollup Lists for which you are an owner are displayed (Figure 7-1 on page 7-2).

2. Do one of the following:

   - If the Rollup List you want to view is not displayed, click **[Show All Rollup Lists]**.

     All Shared Rollup Lists are added to your Rollup Lists.

   - If the Rollup List you want to view is displayed, go to Step 3.

3. From the Name list box, select the name of the Rollup List you want to view.

   > **Tip:** Use the Search Lists feature to quickly locate an entry in the Name list box. In the Search Lists popup, type the name or the first few letters of the name of the Rollup List you want to find and click **Search**. The first Rollup List matching your criteria is selected in the Name list box.

4. From the Item Type list box, select the type of items you want to view in the selected Rollup list (e.g., companies, names, or positions).

5. Click **Go**.

   The selected Rollup List and items are displayed in the Rollup List frame.

Figure 7-3

6. Click the blue **Print** button to generate a Summary report.

    The Summary Report is launched in a new browser window.
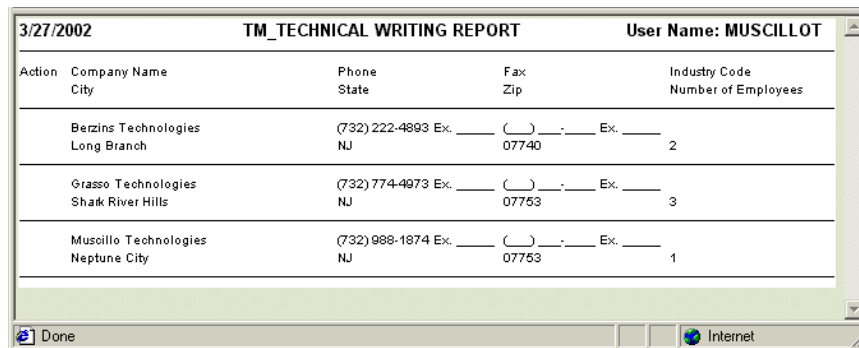
Figure 7-4

7. If desired, do one or both of the following:

    - Choose **File/Save** from the new browser window to save the report.

    - Choose **File/Print** from the new browser window to print the report.

Working with Rollup Activities

You cannot associate activities with Rollup Lists. You can associate activities with companies, names, and positions only. However, you can associate activities with Rollup List items. In addition, you can view Rollup List item activities, add, delete, and edit Rollup List item activities, and generate a Rollup List Item Activity Report.

Read the following sections for further details:

- Viewing Rollup List Item Activities on page 7-6.
- Adding Activities to Rollup List Items on page 7-7.
- Generating Rollup List Item Activity Reports on page 7-10.

Viewing Rollup List Item Activities

Activities are not associated with Rollup Lists but Rollup List *items*. You can view Rollup List Item Activities from the Rollup List frame.

Procedure 7-3   Viewing Rollup List Item Activities

1. Display the Rollup List containing the item whose activities you want to view in the Rollup List Frame. For complete instructions, perform Procedure 7-1, Viewing Rollup Lists on page 7-2.
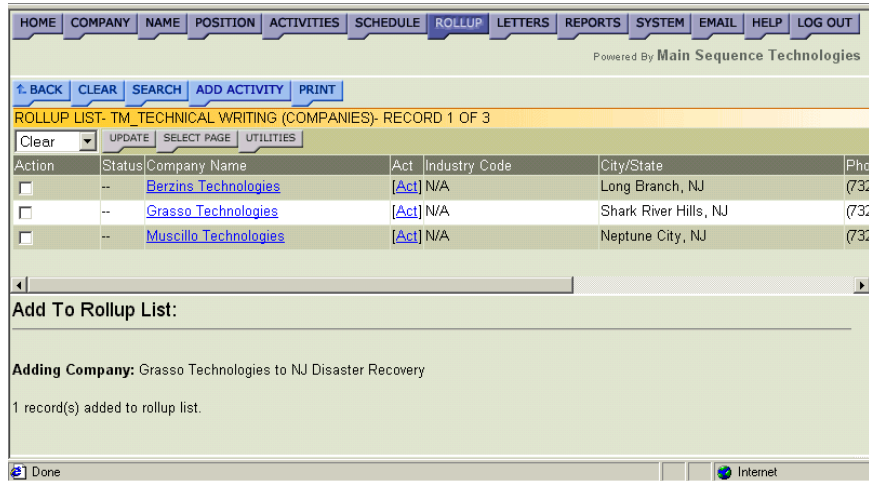
Figure 7-5

2. Click the **[Act]** link that corresponds to the item whose activities you want to view.

   The Activities frame is displayed. All activities associated with the selected item are displayed.
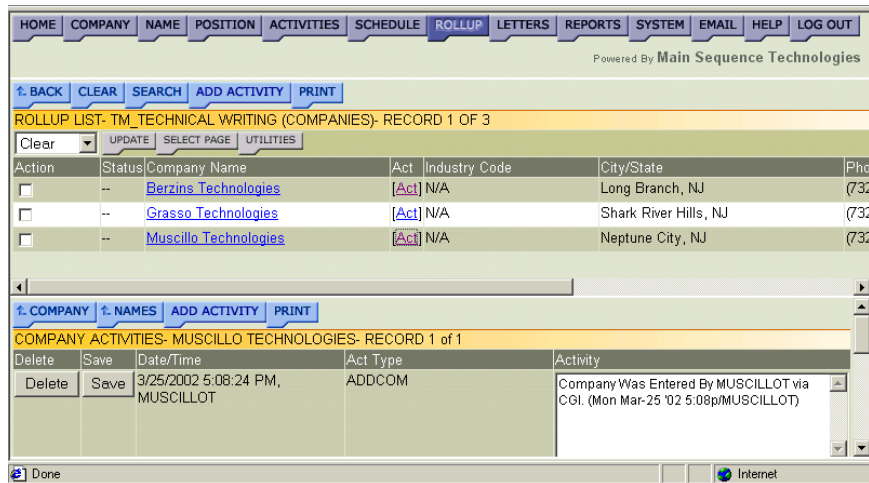
Figure 7-6

3. If desired, do one or more of the following:

    - Click the corresponding **Delete** button to delete an activity.

    - In the Activity text box, make changes to the activity description and click the corresponding **Save** button.

    - Click the blue **Add Activity** button to create a new activity.

      Read Adding Activities to Rollup List Items on page 7-7 for further details.

    - Click the blue **Print** button to generate a Summary Report of the information listed in the Activities frame.

      Read Generating Rollup List Item Activity Reports on page 7-10 for further details.

Adding Activities to Rollup List Items

You can add activities to Rollup List items from the Rollup List frame. If you want to add an activity to an entire Rollup List, you *must* select all the items in the list. When adding a new activity, you can indicate whether you want to add it to the Schedule or configure an alarm.

Procedure 7-4   Adding Activities to Rollup List Items

1. Display the Rollup List containing the item whose activities you want to view in the Rollup List Frame. For complete instructions, perform Procedure 7-1, Viewing Rollup Lists on page 7-2.
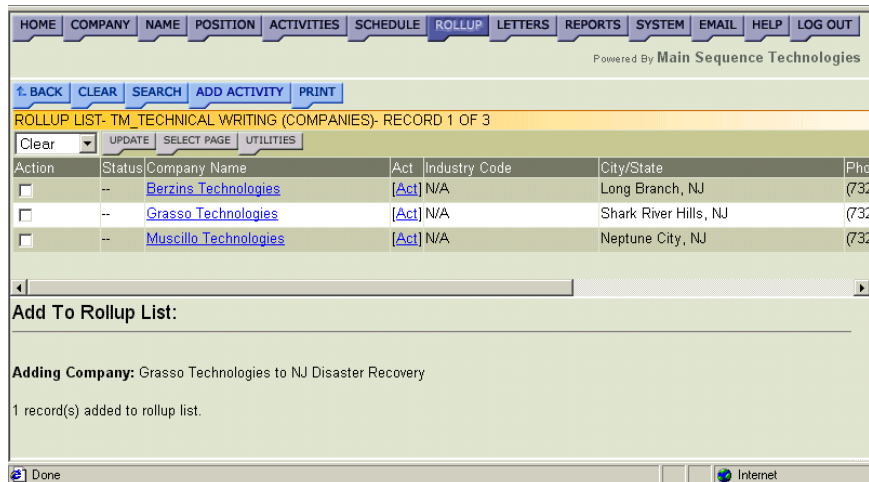
Figure 7-7

2. Select the corresponding check boxes of the items to which you want to add an activity.

3. Click the blue **Add Activity** button.

    The Attach Activities frame is displayed. The current date and time are displayed in the Date and Time text box.
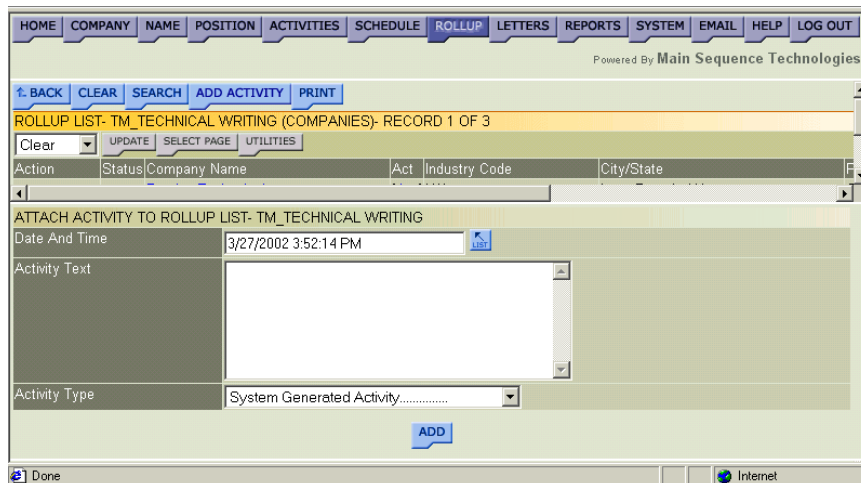
Figure 7-8

4. If you want to change the date and time, do the following:

    *   Click the Data and Time List button to display the Select Date and Time window.
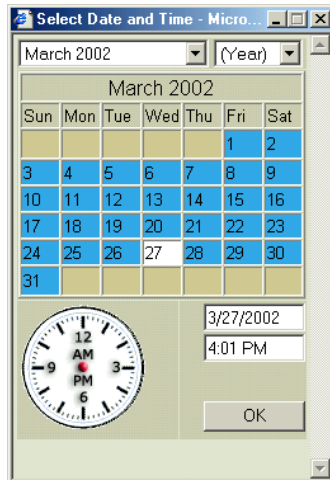
    Figure 7-9

    *   Use the provided controls to set a new date and time and click **OK**.

        You are returned to the Attach Activities frame and your selections are displayed in the Date and Time text box.

5. If desired, in the Activity Text box, enter details about the activity.

6. From the Activity Type list box, select the type that best describes the activity.

    > **Tip:** By default, System Generated Activity is displayed in the Activity Type list box. To change the default activity, select the **Default Type** link to display the Select Default Activity Type window, choose a different type from the provided list box, and click **Save** to return to the previous window.

7. Select the provided check box if you want to copy the current activity to the company with which the Rollup List items are associated.

8. Select the provided check box if you want to display the current activity on the Schedule.

9. Configure Alarm options; do the following:

    *   Select the Add Reminder Alarm check box.

    *   From the provided list, indicate when the alarm should be generated (options range 15 minutes to 3 days).

    > **Note:** This feature may not be available from all Add Activities frames.

10. Click **Add**.

A status message is displayed and the activity is attached to the Rollup List item.
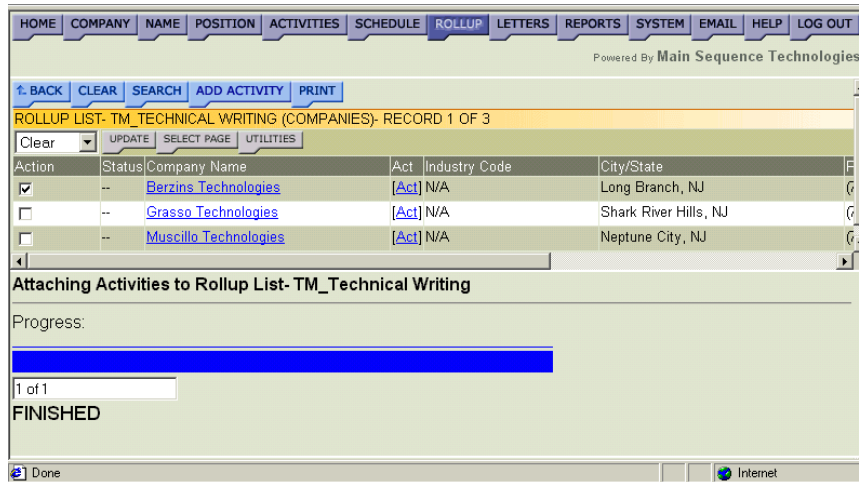
Figure 7-10

You can view this activity from several frames within PCRecruiter including the Rollup List frame; read Viewing Rollup List Item Activities on page 7-6 for more details.

Generating Rollup List Item Activity Reports

You can print a Summary Report from the Activities frame. When you print the report, it is opened in a new browser window. From the new browser window, you can print the report to your network printer or save it to your local or network drive.

Note: PCRecruiter contains a complete reporting tool. To learn more, read Chapter 8, Generating Reports.

Procedure 7-5   Generating Rollup List Item Activity Reports

1. Display the Rollup List containing the item whose activities you want to view in the Rollup List Frame. For complete instructions, perform Procedure 7-1, Viewing Rollup Lists on page 7-2.
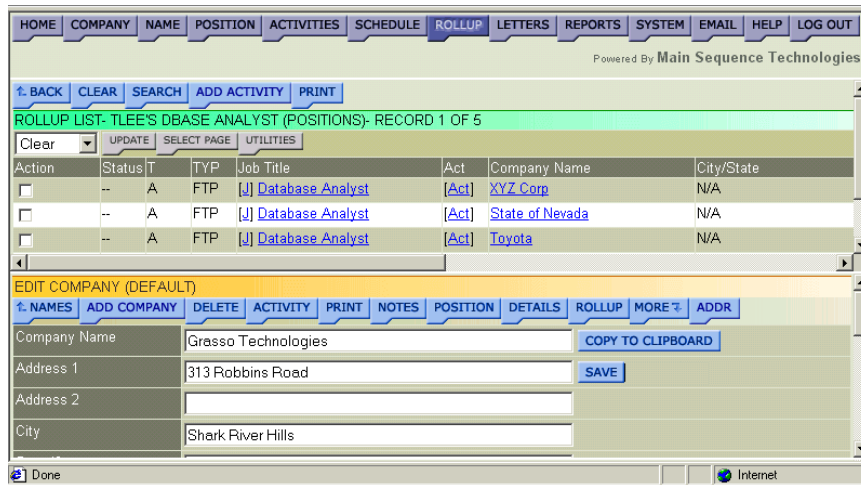
Figure 7-11

2. Click the **[Act]** link that corresponds to the item whose activities you want to view.

   The Activities frame is displayed. All activities associated with the selected item are displayed.
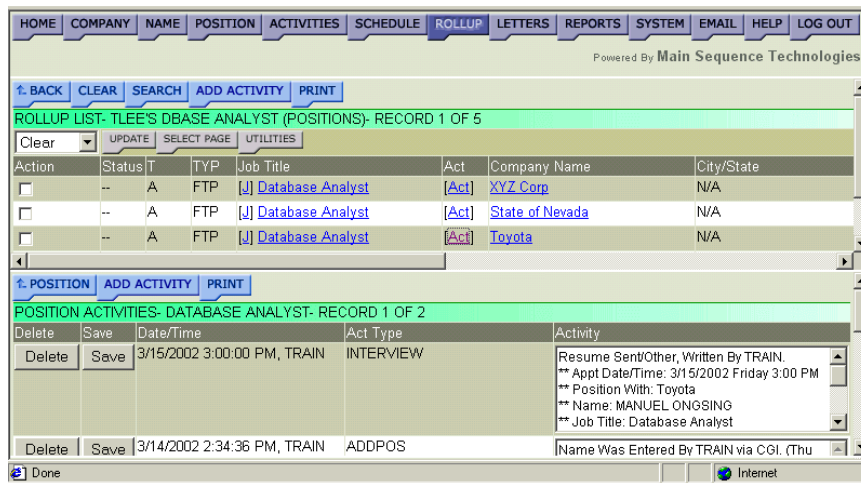
Figure 7-12

3. Click the blue **Print** button to generate a Summary report.

   The Summary Report is launched in a new browser window.

Figure 7-13

4. If desired, do one or both of the following:

- Choose **File/Save** from the new browser window to save the report.

- Choose **File/Print** from the new browser window to print the report.

Creating Rollup Lists

You can create Rollup Lists from multiple frames within PCRecruiter by selecting the **[Add New Rollup List]** link. You can create new Rollup Lists when:

- Adding or retrieving companies, names, and positions from the database. (Chapters 1, 2, and 3).

- Viewing Rollup Lists on page 7-2.

- Moving List Items to Another List on page 7-21.

- Copying List Items to Another List on page 7-24.

You can also add a New Rollup List from the Edit System Setup Frame. Read the following sections for further details:

- Creating a New Rollup List on page 7-13.

- Creating Rollup Lists from the Edit System Setup Frame on page 7-15.

Creating a New Rollup List
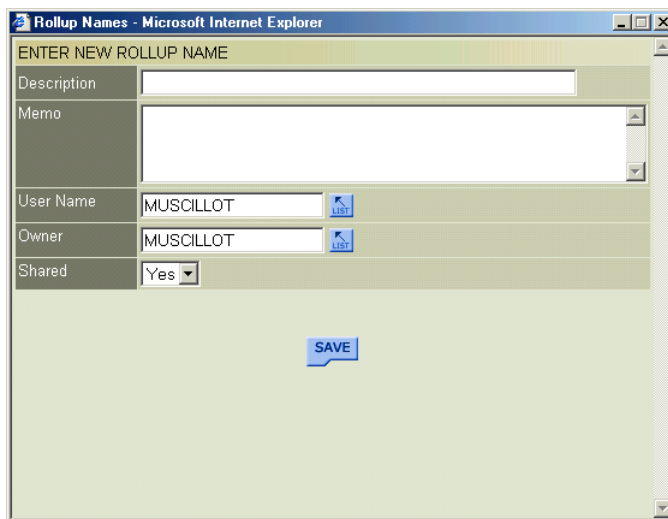
The following procedure assumes that you are adding or retrieving companies, names, and positions from the database; copying or moving Rollup List Items from one Rollup List to another; or viewing Rollup Lists.

Procedure 7-6   Creating a New Rollup List

1. Click **[Add New Rollup List].**

    The Enter New Rollup Name window is displayed.

Figure 7-14

Your login ID is displayed in the User Name and Owner text boxes.

2. In the Description text box, type a name for the new Rollup List.

3. In the Memo text box, type a description for the Rollup List.

4. If you want to assign a different Owner, do the following:

    *   Click **List** to display the Dropdown List window.
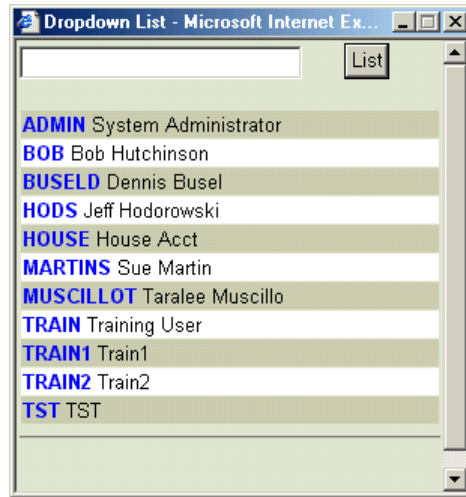
- Click the name of the new owner.

  You are returned to the Enter New Rollup Name window and your selection is displayed in the Owner text box.

5. Select one of the following options from the Shared list box:

    - **Yes**. Select Yes to indicate that the list is shared. All users can view this list.

    - **No**. Select No to indicate that the list is not shared. Only you can view this list.

6. Click **Save**.

    The Enter New Rollup Name window is closed and you are returned to the frame from which you selected the **[Add New Rollup List]** link. The new Rollup List is displayed in the Name list box as illustrated below.
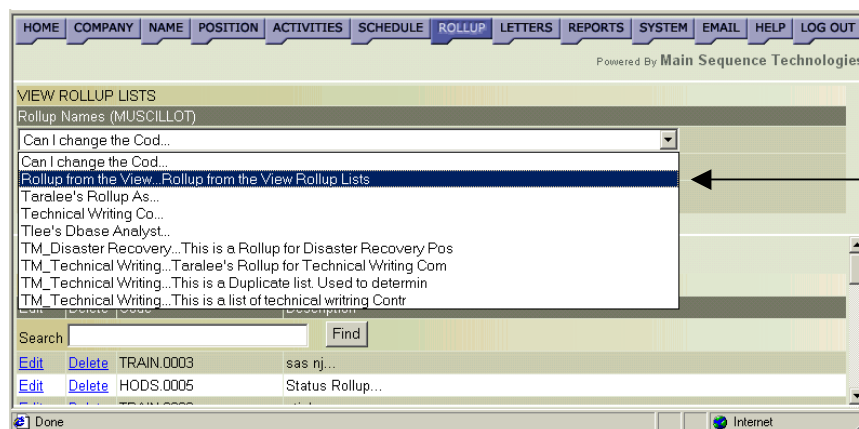
Figure 7-15

Creating Rollup Lists from the Edit System Setup Frame

You can create a new Rollup List from the Edit System Setup frame; however, the Rollup List will be empty. To add items to an empty Rollup List, perform Procedure 7-9 on page 7-19.

⌖ *Only users with Administrative permissions can perform this procedure.*

Procedure 7-7   Creating Rollup Lists from the Edit System Setup Frame

1. Click the purple **System** tab from the Browser header.

    The Edit System Setup frame is displayed.
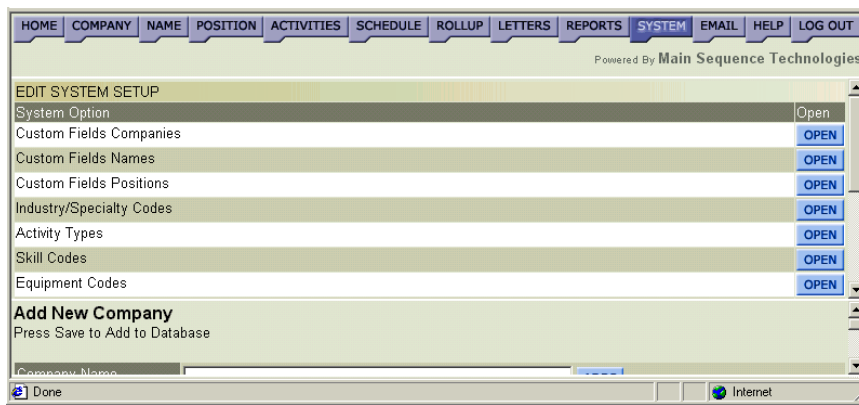
Figure 7-16

2. Click the Rollup Lists **Open** button.

    The Rollup Names frame is displayed.
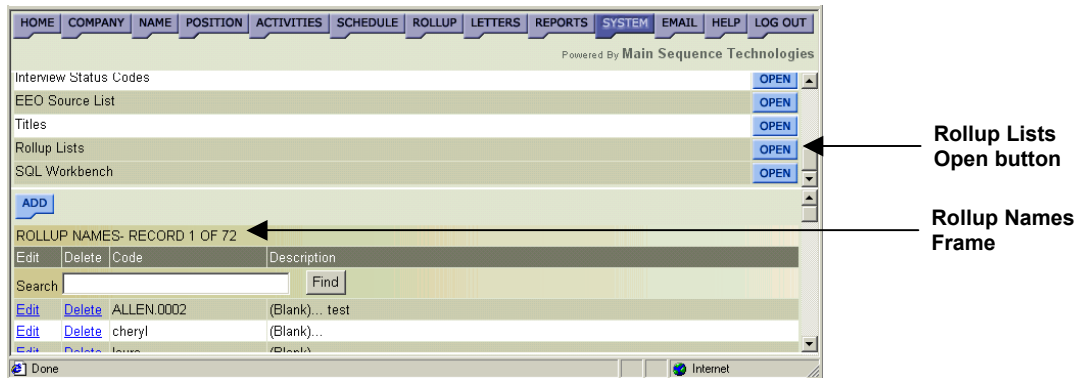
Figure 7-17

3. Click **Add**.

    The Enter New Rollup Name frame is displayed. Your login ID is displayed in the User Name and Owner text boxes.

4. In the Description text box, type a name for the new Rollup List.

5. In the Memo text box, type a description for the Rollup List.

6. If you want to assign a different Owner, do the following:

- Click **List** to display the Dropdown List window.
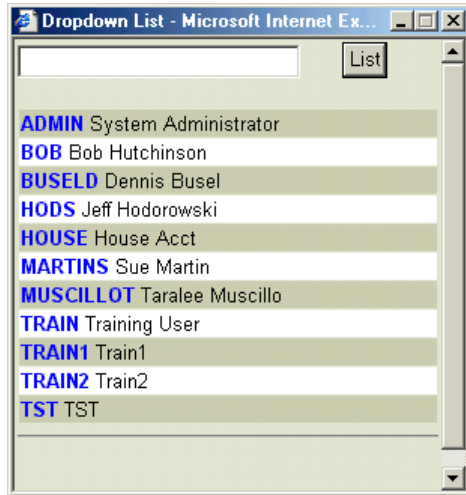
- Click the name of the new owner.

    You are returned to the Enter New Rollup Name window and your selection is displayed in the Owner text box.

7. Select one of the following options from the Shared list box:

- **Yes**. Select Yes to indicate that the list is shared. All users can view this list.

- **No**. Select No to indicate that the list is not shared. Only you can view this list.

8. Click **Save**.

    An Update Successful Message is displayed.
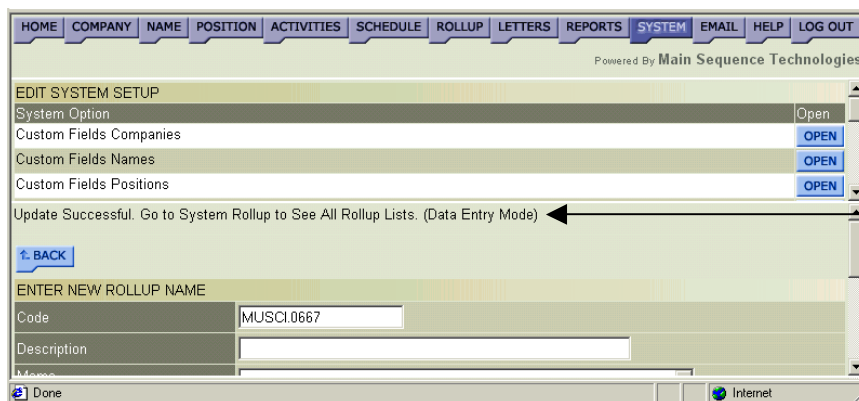
Figure 7-18

Modifying Rollup Lists

You can add items to existing Rollup Lists and delete items from your Rollup Lists *and* shared Rollup Lists. You can also copy and move items from one Rollup List to another. Read the following sections for further details:

- Editing Rollup List Properties on page 7-17.

- Adding Items to Existing Rollup Lists on page 7-19.

- Moving List Items to Another List on page 7-21.

- Copying List Items to Another List on page 7-24.

- Deleting Rollup List Items on page 7-28.

Editing Rollup List Properties

If you have administrative permissions you can edit Rollup List properties.

✋ *Only users with Administrative permissions can perform this procedure.*

Procedure 7-8   Editing Rollup List Properties

1. Click the purple **System** tab from the Browser header.

   The Edit System Setup frame is displayed.
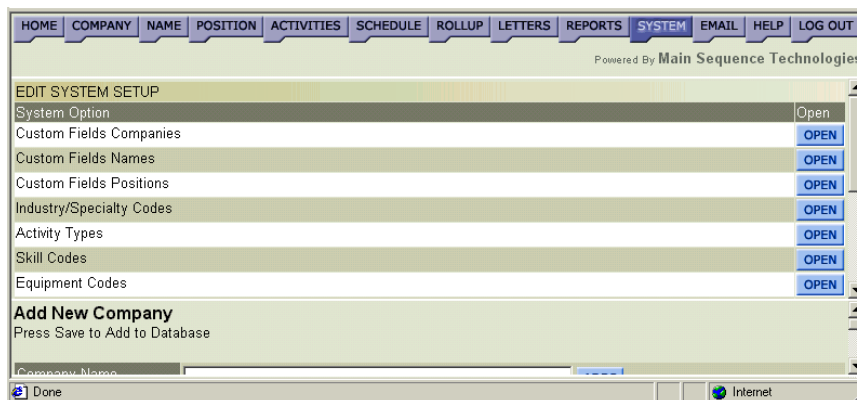
Figure 7-19

2. Click the Rollup Lists **Open** button.

   The Rollup Names frame is displayed.
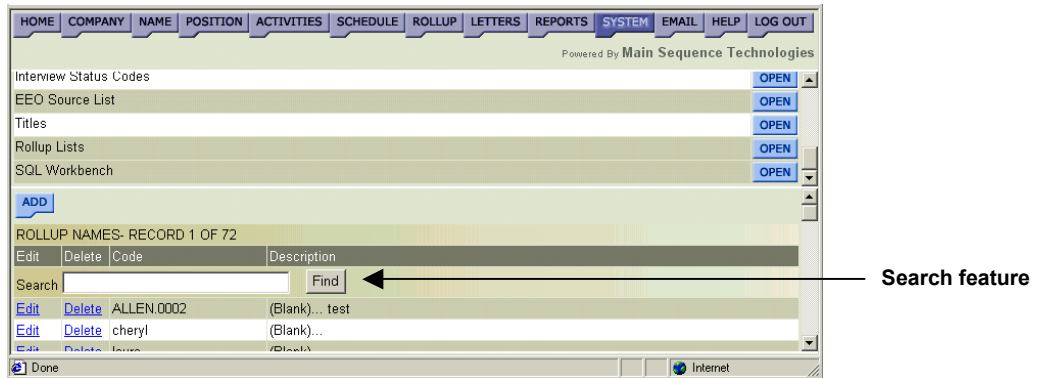
Figure 7-20

3. Click the corresponding **Edit** link of the Rollup List you want to edit.

> **Tip:** To quickly locate an entry in the list. In the Search text box, type the name or the first few letters of the name of the Rollup List you want to edit and click **Find**.

The Enter New Rollup Name frame is displayed.

4. If desired, do one or more of the following:

- In the Description text box, change the Rollup List name.

- In the Memo text box, change the Rollup List description.

- In the Owner text box, assign a new owner to the Rollup List.

- Change the Shared option. Select one of the following:

  - **Yes**. Select Yes to indicate that the list is shared. All users can view this list.

  - **No**. Select No to indicate that the list is not shared. Only you can view this list.

5. Click **Save**.

Your changes are saved and displayed in the Rollup Names frame.
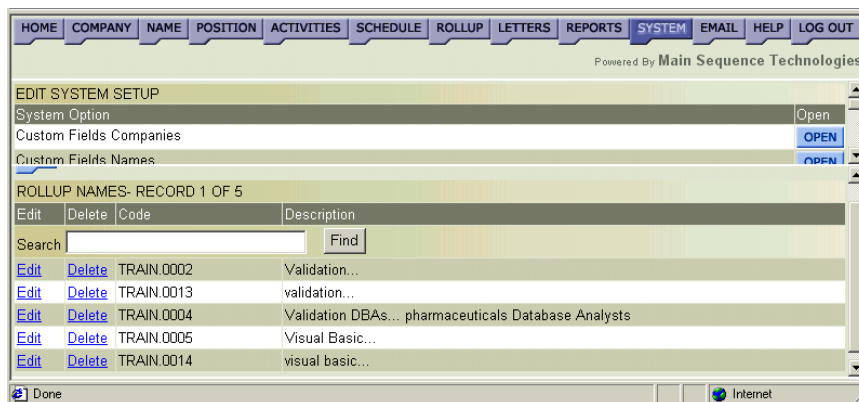
Figure 7-21

Adding Items to Existing Rollup Lists

You can add company, name, and position items to existing Rollup Lists. You can add these items to Rollup Lists after adding them to the database or after retrieving them from the database. You can add the same item to multiple Rollup Lists. However, you cannot add an item to a Rollup List more than once.

Procedure 7-9   Adding Items to Existing Rollup Lists

1. Find or add the company, name or position you want to add to the Rollup List. Refer to Chapters 1, 2, 3, and 4 for complete instructions.

Displayed frame after retrieving a Company record

Displayed frame after adding a name
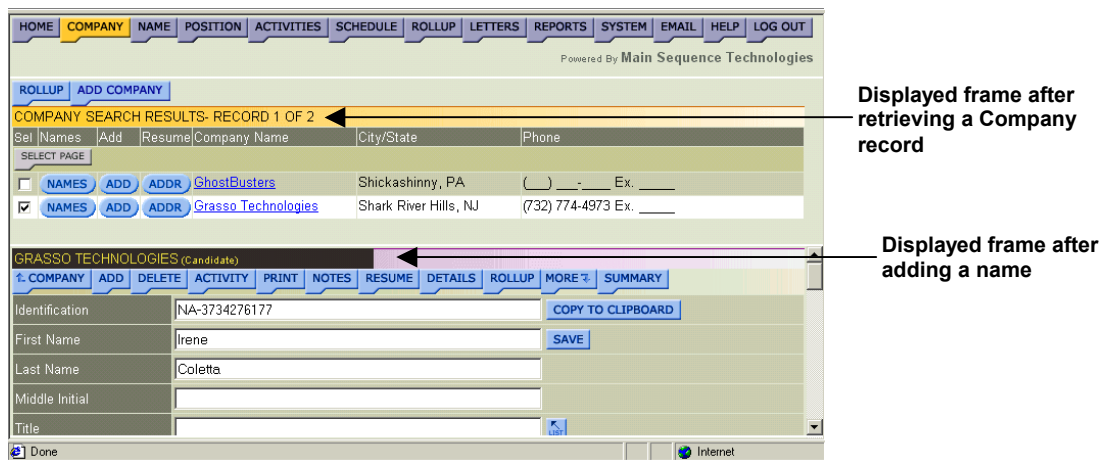
Figure 7-22

2. From the displayed frame, do one of the following:

    *   If you are adding one or more items that you retrieved, select the corresponding check box of the items you want to add to the same Rollup List.

    *   If you are adding an item that you just added to the database, go to Step 3.

3. Click the blue **Rollup** button.

    The Add to Rollup List frame is displayed.
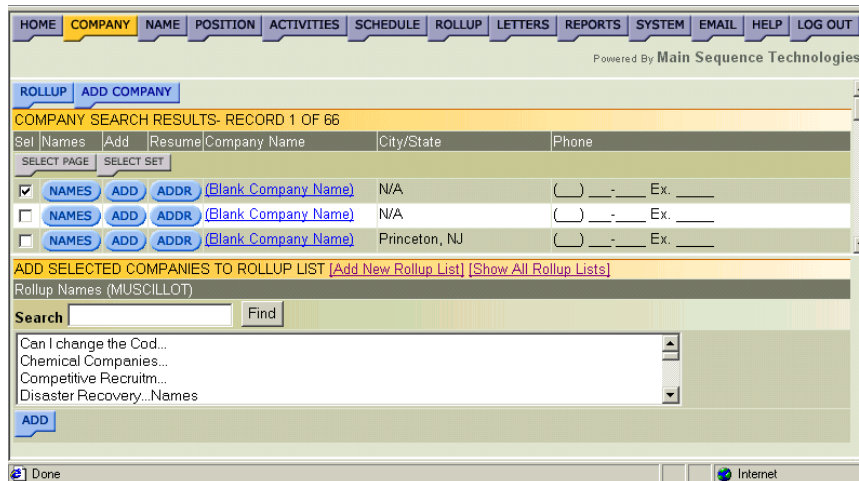
Figure 7-23

4. Do one of the following:

- If the Rollup List to which you want to add the item(s) is not displayed, click **[Show All Rollup Lists].**

  All Shared Rollup Lists are added to your Rollup Lists.

- If the Rollup List to which you want to add the item(s) is displayed, go to Step 5.

5. From the provided list, select the Rollup List to which you want to add your selections.

> **Tip:** Use the Search feature to quickly locate an entry in the Name list box. In the Search text box, type the name or the first few letters of the name of the Rollup List you want to find and click **Find**. The first Rollup List matching your criteria is selected in the Name list box.

6. Click **Add**.

An Add to Rollup List confirmation is displayed.

Figure 7-24

Moving List Items to Another List

There are two steps you must perform to move an item from one Rollup List to another Rollup List. *First*, you must select the item to be moved and *then* you must select the Rollup List to which the item should be moved. Read the following sections and perform their procedures:

- Selecting Items to Move on page 7-21.

- Selecting Another Rollup List on page 7-26.

Selecting Items to Move

You can move one or more items from one list to another. To do so, you must first select the item(s) to move as described in the following procedure and then select the Rollup List to which you want to move the items as described in Procedure 7-11 on page 7-23.

Procedure 7-10   Selecting Items to Move

1. Click the purple **Rollup** tab from the Browser header.

   The View Rollup Lists frame is displayed. All Rollup Lists for which you are an owner are displayed (Figure 7-1 on page 7-2).

2. Do one of the following:

   - If the Rollup List to which you want to move the item(s) is not displayed, click **[Show All Rollup Lists]**.

     All Shared Rollup Lists are added to your Rollup Lists.

   - If the Rollup List to which you want to move the item(s) is displayed, go to Step 3.

3. From the Name list box, select the name of the Rollup List containing the item you want to move.

> **Tip:** Use the Search Lists feature to quickly locate an entry in the Name list box. In the Search Lists popup, type the name or the first few letters of the name of the Rollup List you want to find and click **Search**. The first Rollup List matching your criteria is selected in the Name list box.

4. From the Item Type list box, select the type that corresponds to the items you want to move (e.g., companies, names, or positions).

5. Click **Go**.

   The selected Rollup List and items are displayed in the Rollup List frame.
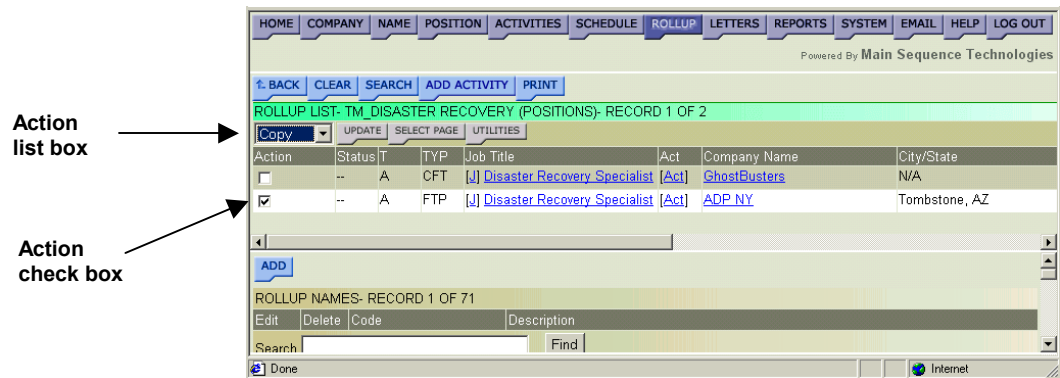
Figure 7-25

6. Select the corresponding Action check box of the item(s) you want to move.

7. From the Action list box, choose Move.

8. Click the **Update** button.

   The Move to Another Rollup List frame is displayed. All Rollup Lists for which you are an owner are displayed.
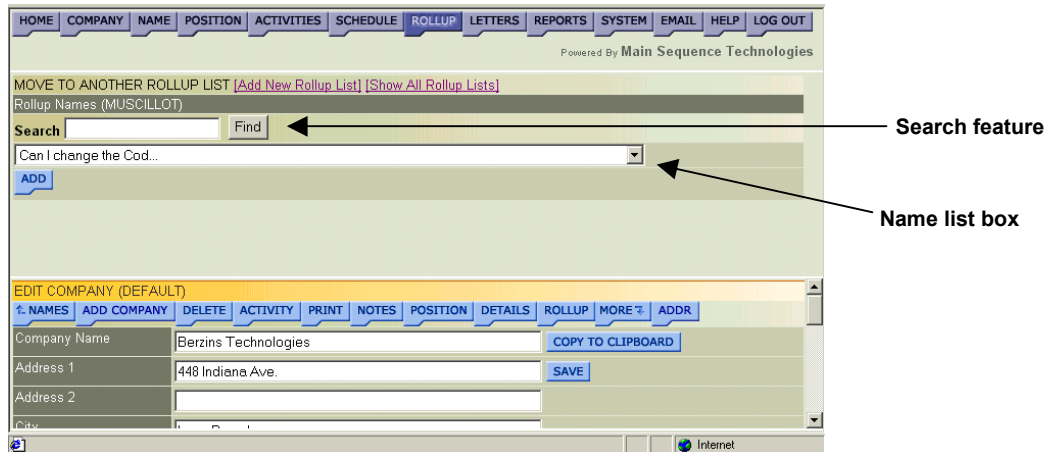
Figure 7-26

Note: If you added a new Rollup List, the Rollup List names will display in a **list box**. If you did not add a new Rollup List, the Rollup List names will display in a **group box**. Compare Figure 7-26 and Figure 7-29.

9. Perform Procedure 7-11 below.

Selecting Another Rollup List

Once you have selected the items to move, you must select the Rollup List to which you want to move them.

Note: The following procedure assumes that you have performed Procedure 7-10 on page 7-21.

Procedure 7-11   Selecting Another Rollup List

1. From the Move to Another Rollup List frame (Figure 7-26), do one of the following:

   - If the Rollup List to which you want to move the item(s) **is not** displayed, go to Step 2.

   - If the Rollup List to which you want to move the item(s) **is** displayed, go to Step 3.

2. If the Rollup List to which you want to move the item(s) is not displayed, do one of the following:

   - Click **[Show All Rollup Lists].**

     All Shared Rollups are displayed as well as your own.

   - Click **[Add New Rollup List]** and create a new list. For complete instructions, perform Procedure 7-6 on page 7-13.

     The new Rollup List is added to the displayed list.

3. From the Name list box, select the Rollup List to which you want to move the item(s).

> **Tip:** Use the Search feature to quickly locate an entry in the Name list box. In the Search text box, type the name or the first few letters of the name of the Rollup List you want to find and click **Find**. The first Rollup List matching your criteria is selected in the Name list box.

4. Click **Add**.

The items are moved and you are returned to the previous Rollup List frame.

> **Note:** Compare Figure 7-25 (page 7-22) and Figure 7-27 below. The selected item in Figure 7-25 is no longer displayed in Figure 7-27.

Figure 7-27

Copying List Items to Another List

There are two steps you must perform to copy an item from one Rollup List to another Rollup List. *First*, you must select the item to be copied and *then* you must select the Rollup List to which the item should be copied. Read the following sections and perform their procedures:

- Selecting Items to Copy on page 7-24.

- Selecting Another Rollup List on page 7-26.

Selecting Items to Copy

You can copy one or more items from one list to another. To do so, you must first select the item(s) to copy as described in the following procedure and then select the Rollup List to which you want to copy the items as described in Selecting Another Rollup List on page 7-26.

Procedure 7-12   Selecting Items to Copy

1. Click the purple **Rollup** tab from the Browser header.

   The View Rollup Lists frame is displayed. All Rollup Lists for which you are an owner are displayed (Figure 7-1 on page 7-2).

2. Do one of the following:

   - If the Rollup List to which you want to move the item(s) is not displayed, click **[Show All Rollup Lists]**.

     All Shared Rollup Lists are added to your Rollup Lists.

   - If the Rollup List to which you want to move the item(s) is displayed, go to Step 3.

3. From the Name list box, select the name of the Rollup List containing the item you want to copy.

   > **Tip:** Use the Search Lists feature to quickly locate an entry in the Name list box. In the Search Lists popup, type the name or the first few letters of the name of the Rollup List you want to find and click **Search**. The first Rollup List matching your criteria is selected in the Name list box.

4. From the Item Type list box, select the type that corresponds to the item you want to copy (e.g., companies, names, or positions).

5. Click **Go**.

   The selected Rollup List and items are displayed in the Rollup List Frame.
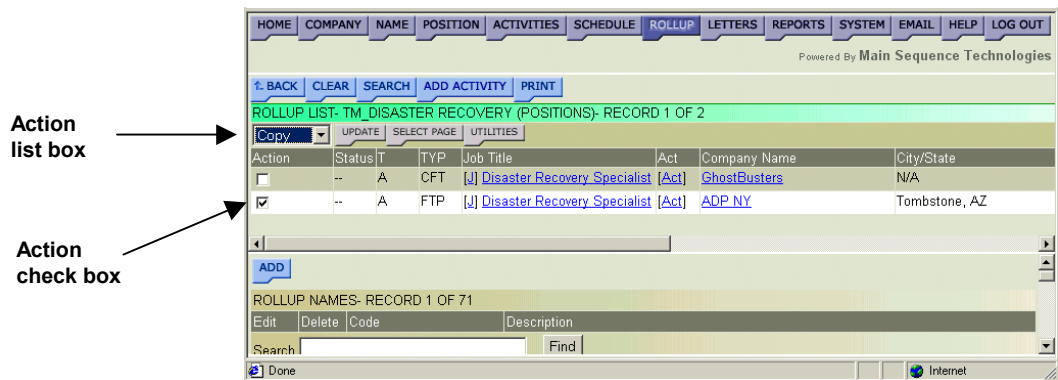
Figure 7-28

6. Select the corresponding Action check box of the item(s) you want to copy.

7. From the Action list box, choose Copy.

8. Click the **Update** button.

The Copy to Another Rollup List frame is displayed. All Rollup lists for which you are an owner are displayed.
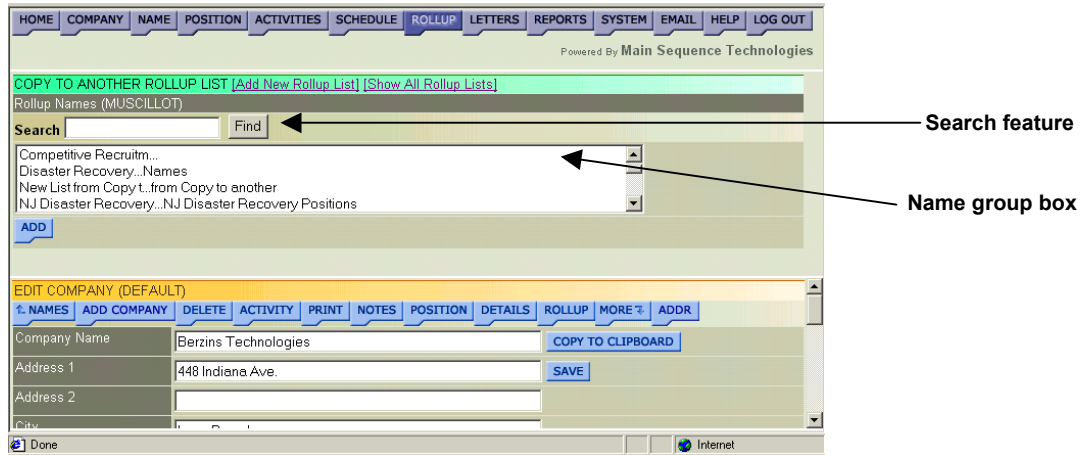
Figure 7-29

Note: If you added a new Rollup List, the Rollup List names will display in a **list box**. If you did not add a new Rollup List, the Rollup List names will display in a **group box**. Compare Figure 7-26 and Figure 7-29.

9. Perform Procedure 7-13 below.

Selecting Another Rollup List

Once you have selected the items to copy, you must select the Rollup List to which you want to copy them.

Note: The following procedure assumes that you have performed Procedure 7-12 on page 7-25.

Procedure 7-13   Selecting Another Rollup List

1. From the Copy to Another Rollup List frame (Figure 7-29), do one of the following:

    • If the Rollup List to which you want to add the item(s) **is not** displayed, go to Step 2.

    • If the Rollup List to which you want to add the item(s) **is** displayed, go to Step 3.

2. If the Rollup List to which you want to add the item(s) is not displayed, do one of the following:

   - Click **[Show All Rollup Lists].**

     All Shared Rollup Lists are displayed as well as your own.

   - Click **[Add New Rollup List]** and create a new list. For complete instructions, perform Procedure 7-6 on page 7-13.

     The new Rollup List is added to the displayed list.

3. From the Name list box, select the Rollup List to which you want to copy the selected item(s).

   > **Tip:** Use the Search feature to quickly locate an entry in the Name list box. In the Search text box, type the name or the first few letters of the name of the Rollup List you want to find and click **Find**. The first Rollup List matching your criteria is selected in the Name list box.

4. Click **Add**.

   The items are copied and you are returned to the previous Rollup List Frame.

Deleting Rollup List Items

You can delete items from a rollup list that were added in error or that are no longer needed. You can delete items from your Rollup Lists *and* Shared Rollup Lists.

When you delete Rollup List items they are *only* removed from the Rollup list, the items you contained are *still* available in the Database.

Procedure 7-14   Deleting Rollup List Items

1. Click the purple **Rollup** tab from the Browser header.

   The View Rollup Lists frame is displayed. All Rollup Lists for which you are an owner are displayed (Figure 7-1 on page 7-2).

2. Do one of the following:

   - If the Rollup List from which you want to delete items is not displayed, click **[Show All Rollup Lists]**.

     All Shared Rollup Lists are added to your own.

   - If the Rollup List from which you want to delete items is displayed, go to Step 3.

3. From the Name list box, select the name of the Rollup List that contains the items you want to delete.

> **Tip:** Use the Search Lists feature to quickly locate an entry in the Name list box. In the Search Lists popup, type the name or the first few letters of the name of the Rollup List you want to find and click **Search**. The first Rollup List matching your criteria is selected in the Name list box.

4. From the Item Type list box, select the type that corresponds to the items you want to delete (e.g., companies, names, or positions).

5. Click **Go**.

   The selected Rollup List and items are displayed in the Rollup Lists frame.
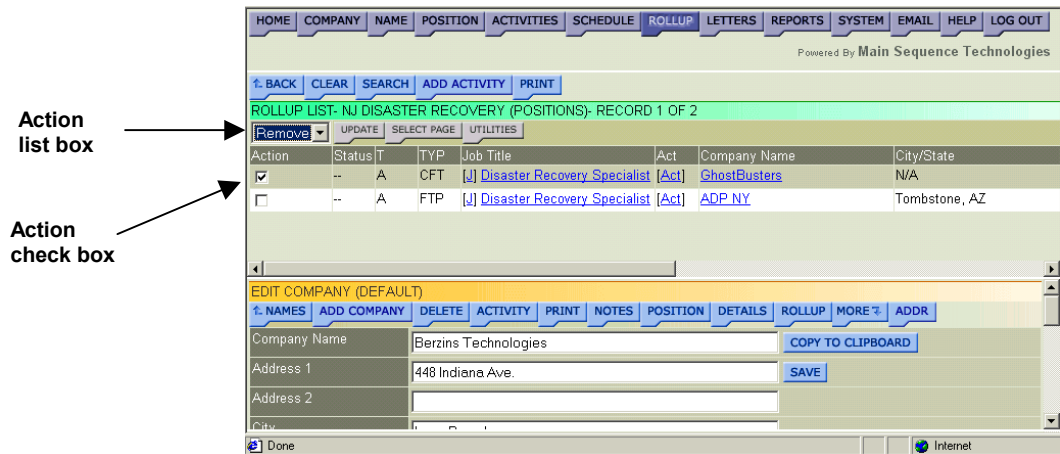
Figure 7-30

6. Select the corresponding check box of the items you want to remove from the Rollup List.

7. From the Action list box, choose Remove.

8. Click the **Update** button.

   The Rollup List frame is refreshed and the selected items are removed.

Deleting Rollup Lists

You can delete Rollup Lists that were added in error or that are no longer needed.

When you delete a Rollup List, *only* the list is removed from the Database, the items contained in the list are *still* available in the Database.

Ƃ *Only users with Administrative permissions can perform this procedure.*

Procedure 7-15   Deleting Rollup Lists

1. Click the purple **System** tab from the Browser header.

    The Edit System Setup frame is displayed (Figure 7-19 on page 7-17).

2. Click the Rollup Lists **Open** button.

    The Rollup Names frame is displayed.
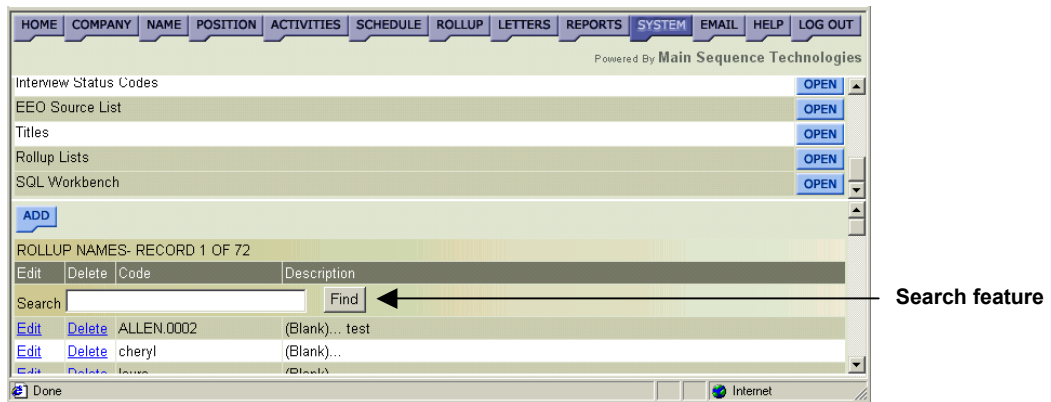
Figure 7-31

3. Click the corresponding **Delete** link of the Rollup List you want to delete.

    Tip: To quickly locate an entry in the list. In the Search text box, type the name or the first few letters of the name of the Rollup List you want to edit and click **Find**.

    A Confirm Delete message is displayed.
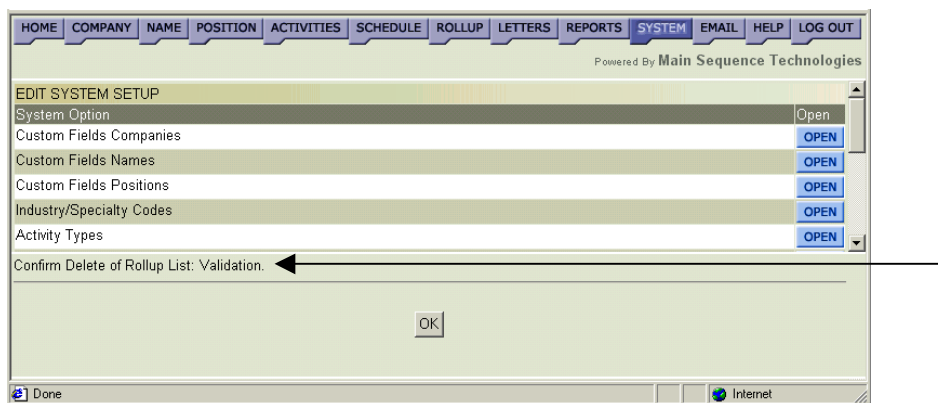
Figure 7-32

4. Click **OK** to acknowledge the message and return to the Rollup Names frame.

Generating Reports

What You'll Find in This Chapter

This chapter explains how to generate Company, Name, and Position Reports. In addition, this chapter also explains how to generate Applicant Tracking Reports. Refer to the following table for a description of the sections you will find in this chapter.

Table 8-1 What You'll Find in Chapter 8

If you want to…	Read…
Know what types of report formats are available for Company, Name, and Position reports,	Available Reports on page 8-2.
Generate a Summary or Detail Company Report,	Generating Company Reports on page 8-3.
Generate a Summary, Detail, or Pocket Name Report,	Generating Name Reports on page 8-5.
Generate a Summary, Detail, or Open Position Report,	Generating Position Reports on page 8-8.
Generate an Applicant Tracking Report filtered by Company Name, Job Title, or Position ID,	Generating Applicant Tracking Reports on page 8-10.

Available Reports

There are several report formats available for you when generating Company, Name, and Position reports. Refer to the following table for report descriptions. Unless otherwise indicated, all formats are available for Company, Name, and Position reports.

Table 8-2 Report Format Descriptions

Report Format	Description
Summary	
Company	This report displays the company name, city, state, zip code, telephone and fax numbers, industry code, and number of employees.
Name	This report displays the person's first and last name, city, state, zip code, home and work numbers, company name, and title.
Position	This report displays the position's company name, contact name, contact number, job title, job type, position ID, city, state, and date posted.
Summary with 5 Activities	Contains the same information above with the 5 most recent activities associated with the company, name, or position.
Summary with Activities	Contains the same information above with the all activities associated with the company, name, or position.
Detail	
Company	Displays the same information as the Summary report, additional company details such as annual revenue as well as custom field information, notes, and keywords.
Name	Displays the same information as the Summary report, additional name information such as desired salary as well as custom field information, summary, notes, and keywords.
Position	Displays the same information as the Summary reports, addition position information such as bill/pay rates as well as job description, keywords, skills, notes, web notes, and benefit information.
Detail with 5 Activities	Displays the same information above with the 5 most recent activities associated with the company, name, or position.
Detail with Activities	Displays the same information above with the all activities associated with the company, name, or position.
Pocket	Available for *Name* reports only, this report displays the person's name, company name, city, state, home phone, and work fax number in a compressed format.

Report Format	Description
Open	Available for *Position* reports only, this report displays the position's company name, contact name, contact phone, job title, job type, user name, city, state, position ID, and date posted.

Generating Company Reports

You can generate a Company report for any company that is associated with a Rollup List. If the company on which you want to report is not part of a Rollup List, read Chapter 7, Working With Rollup Lists.

Procedure 8-1   Generating Company Reports

1. Click the purple **Reports** button in the Browser header.

    The Report Menu frame is displayed.
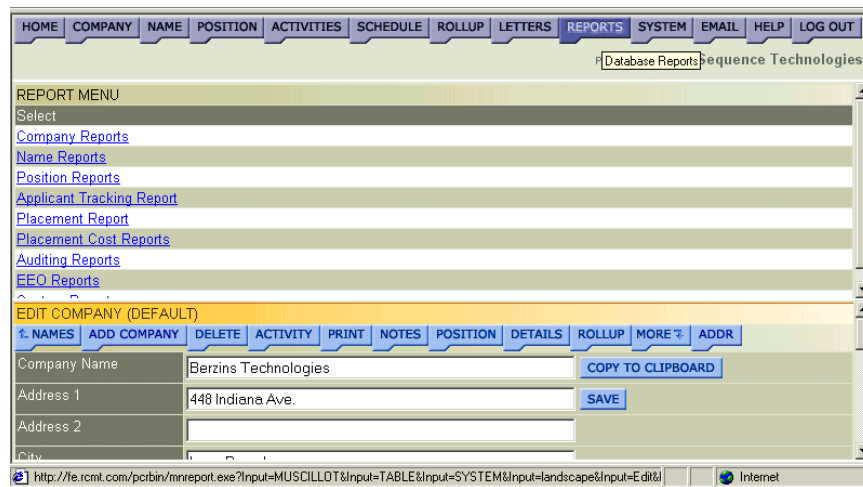
Figure 8-1

2. Click the **Company Reports** link.

    The Company Reports frame is displayed.

Figure 8-2

3. Specify the Rollup List containing the Companies for which you want to generate a report. Do the following:

   - Click the corresponding **List** button to display the Limit to Rollup List frame in the Dropdown List window.

Figure 8-3

   - If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

   - From the provided list box, select the desired Rollup List name.

     Tip: To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

   - Click **Select List**.

     You are returned to the Company Reports frame and your selection is displayed in the Select Rollup List text box.

4. From the provided list box, select the desired report type. Read Available Reports on page 8-2 for a description of available reports.

5. From the provided list box, indicate how you want the report information sorted. For example, select Company Name or State.

6. Select one of the following Sort By radio buttons:

   - **Asc**. Select this radio button to list report information in ascending order (A, B, C, and 1, 2, 3)

   - **Desc**. Select this radio button to list report information in descending order (C, B, A and 3, 2, 1).

7. Click **Print**.

   The selected Company report is launched in a new browser window. For example, Figure 8-4 illustrates the Company Summary Report.

Figure 8-4

8. If desired, do one or both of the following:

   - Choose **File/Save** from the new browser window to save the report.

   - Choose **File/Print** from the new browser window to print the report.

Generating Name Reports

You can generate a Name report for any name that is associated with a Rollup List. If the name on which you want to report is not part of a Rollup List, read Chapter 7, Working With Rollup Lists.

When generating the report, you can indicate the time period for which you want the report to be run.

Procedure 8-2   Generating Name Reports

1. Click the purple **Reports** button in the Browser header.

   The Report Menu frame is displayed (Figure 8-1 on page 8-3).

2. Click the **Name Reports** link.

   The Name Reports frame is displayed.

Figure 8-5

3. Specify the Rollup List containing the Names for which you want to generate a report. Do the following:

- Click the corresponding **List** button to display the Limit to Rollup List frame in the Dropdown List window.

Figure 8-6

- If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

- From the provided list box, select the desired Rollup List name.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

- Click **Select List**.

  You are returned to the Name Reports frame and your selection is displayed in the Select Rollup List text box.

4. In the provided text boxes, specify the time range for which you want to generate the Name report. Type the dates or do the following:

- Click the corresponding **List** button to display the Select Date and Time window.
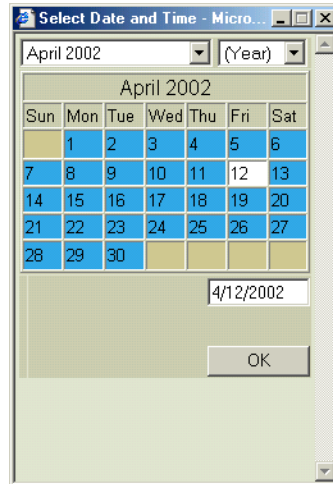
Figure 8-7

- Use the provided controls to set a new date and click **OK**.

You are returned to the Name Reports frame and your selections are displayed in the Select Date Range text boxes.

5. From the provided list box, select the desired report type. Read Available Reports on page 8-2 for a description of available reports.

6. From the provided list box, indicate how you want the report information sorted. For example, select Last Name or Company Name.

7. Select one of the following Sort By radio buttons:

- **Asc**. Select this radio button to list report information in ascending order (A, B, C, and 1, 2, 3)

- **Desc**. Select this radio button to list report information in descending order (C, B, A and 3, 2, 1).

8. Click **Print**.

   The selected Name report is launched in a new browser window. For example, Figure 8-8 illustrates the Name Summary Report with 5 Activities.

Figure 8-8

9. If desired, do one or both of the following:

   • Choose **File/Save** from the new browser window to save the report.

   • Choose **File/Print** from the new browser window to print the report.

Generating Position Reports

You can generate a Position report for any position that is associated with a Rollup List. If the position on which you want to report is not part of a Rollup List, read Chapter 7, Working With Rollup Lists.

When generating the report, you can indicate the time period for which you want the report to be run.

Procedure 8-3   Generating Position Reports

1. Click the purple **Reports** button in the Browser header.

   The Report Menu frame is displayed (Figure 8-1 on page 8-3).

2. Click the **Position Reports** link.

   The Position Reports frame is displayed.
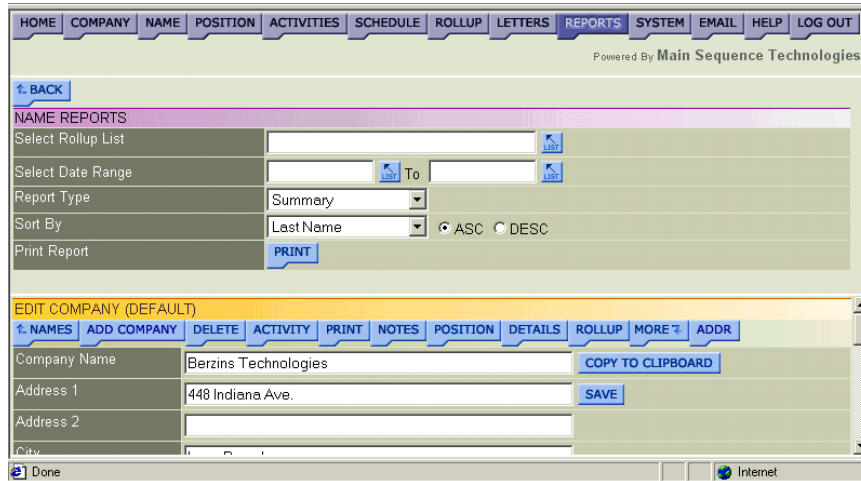
Figure 8-9

3. Specify the Rollup List containing the Positions for which you want to generate a report. Do the following:

- Click the corresponding **List** button to display the Limit to Rollup List frame in the Dropdown List window.
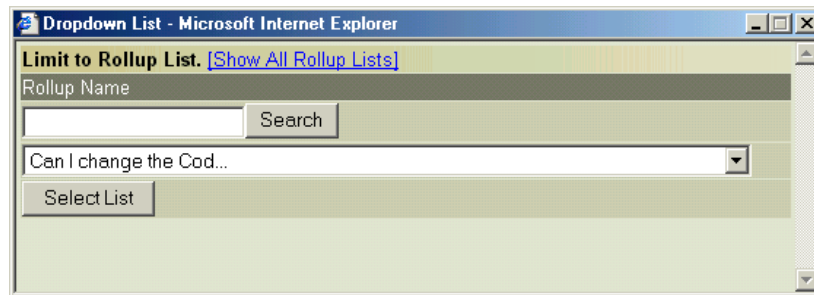
Figure 8-10

- If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

- From the provided list box, select the desired Rollup List name.

  Tip: To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

- Click **Select List**.

  You are returned to the Position Reports frame and your selection is displayed in the Select Rollup List text box.

4. In the provided text boxes, specify the time range for which you want to generate the Position report. Type the dates or do the following:

- Click the corresponding **List** button to display the Select Date and Time window (Figure 8-7 on page 8-7).

- Use the provided controls to set a new date and click **OK**.

You are returned to the Position Reports frame and your selections are displayed in the Select Date Range text boxes.

5. From the provided list box, select the desired report type. Read Available Reports on page 8-2 for a description of available reports.

6. From the provided list box, indicate how you want the report information sorted. For example, select Job Title or Position ID.

7. Select one of the following Sort By radio buttons:

    *   **Asc**. Select this radio button to list report information in ascending order (A, B, C, and 1, 2, 3)

    *   **Desc**. Select this radio button to list report information in descending order (C, B, A and 3, 2, 1).

8. Click **Print**.

    The selected Position report is launched in a new browser window. For example, Figure 8-11 illustrates the Position Detail Report.

Figure 8-11

9. If desired, do one or both of the following:

    *   Choose **File/Save** from the new browser window to save the report.

    *   Choose **File/Print** from the new browser window to print the report.

Generating Applicant Tracking Reports

You can generate an Applicant Tracking report for any candidate that is associated with a Rollup List item. For example, if the applicant *J. Smith* is associated with the Candidate Company and the Candidate Company is associated with the Rollup List on which you are reporting, then *J. Smith* will be returned on the Applicant Tracking Report.

When generating the report, you can indicate the time period for which you want the report to be run. In addition, you can apply filters to the report results to decrease the number of applicants returned. Filters include: Contact Name, Company Name, and Candidate Status.

Procedure 8-4   Generating Applicant Tracking Reports

1. Click the purple **Reports** button in the Browser header.

    The Report Menu frame is displayed (Figure 8-1 on page 8-3).

2. Click the **Applicant Tracking Report** link.

    The Applicant Tracking Reports frame is displayed.
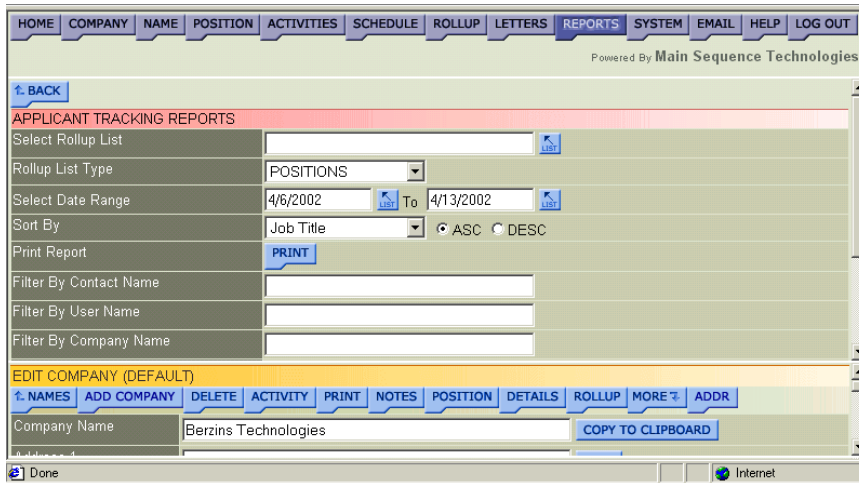
Figure 8-12

3. Specify the Rollup List containing the Applicants for which you want to generate a report. Do the following:

    *   Click the corresponding **List** button to display the Limit to Rollup List frame in the Dropdown List window.
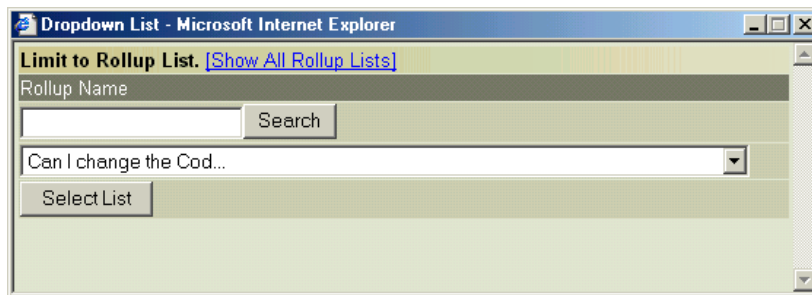
Figure 8-13

    *   If the Rollup List you want to view is not displayed in the provided list box, click **[Show All Rollup Lists]**.

- From the provided list box, select the desired Rollup List name.

  > **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **Search**.

- Click **Select List**.

  You are returned to the Position Reports frame and your selection is displayed in the Select Rollup List text box.

4. From the Rollup List Type list box, select the Rollup List Item to which the desired applicants are associated (e.g., companies, names, positions).

5. In the provided text boxes, specify the time range for which you want to generate the Applicant report. Type the dates or do the following:

   - Click the corresponding **List** button to display the Select Date and Time window (Figure 8-7 on page 8-7).

   - Use the provided controls to set a new date and click **OK**.

   You are returned to the Applicant Tracking Reports frame and your selections are displayed in the Select Date Range text boxes.

6. From the provided list box, indicate how you want the report information sorted. For example, select Job Title or Position ID.

7. Select one of the following Sort By radio buttons:

   - **Asc**. Select this radio button to list report information in ascending order (A, B, C, and 1, 2, 3)

   - **Desc**. Select this radio button to list report information in descending order (C, B, A and 3, 2, 1).

8. Do one of the following:

   - If you want to filter your report further, go to Step 8-12.

   - If you want to run your query, click **Print**.

   The selected Applicant report is launched in a new browser window.

9. If you want to filter your report by Contact Name, do the following:

   - Click the corresponding **List** button to display the Dropdown List window.

   - Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 8-14

- Click the desired name.

  You are returned to the Applicant Tracking Reports frame and your selection is displayed in the Filter by Contact Name text box.

10. If you want to filter your report by User Name, do the following:

- Click the corresponding **List** button to display the Dropdown List window.
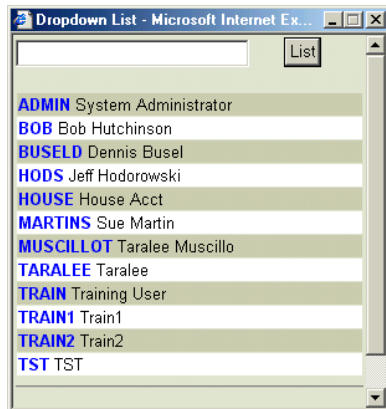
Figure 8-15

- Click the desired name.

  > **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

  You are returned to the Applicant Tracking Reports frame and your selection is displayed in the Filter by User Name text box.

11. If you want to filter your report by Company Name, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

- Type the entire name or the first few letters in the provided text box and click **List** to display the closest matches.

Figure 8-16

- Click the desired name.

  You are returned to the Applicant Tracking Reports frame and your selection is displayed in the Filter by Company Name text box.

12. If you want to filter your report by Job Title, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

Figure 8-17

- Click the desired title.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Applicant Tracking Reports frame and your selection is displayed in the Filter by Job Title text box.

13. If you want to filter your report by Position ID, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

Figure 8-18

- Click the desired ID.

> **Tip:** To locate words in a long list, enter one or more characters in the Lookup text box and click **List**.

You are returned to the Applicant Tracking Reports frame and your selection is displayed in the Filter by Position ID text box.

14. If you want to filter your report by Candidate Status, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

- Click the desired Candidate Status.

You are returned to the Applicant Tracking Reports frame and your selection is displayed in the Filter by Candidate Status text box.

15. If you want to filter your report by Job Status, do the following:

- Click the corresponding **List** button to display the Dropdown List window.

- Click the desired Job Status.

  You are returned to the Applicant Tracking Reports frame and your selection is displayed in the Filter by Job Status text box.

16. Click **Print**.

  The Applicant Tracking report is launched in a new browser window.

Figure 8-19

17. If desired, do one or both of the following:

- Choose **File/Save** from the new browser window to save the report.

- Choose **File/Print** from the new browser window to print the report.

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