

Automatic Activities in WinSearch

Automatic Activity Logging Overview

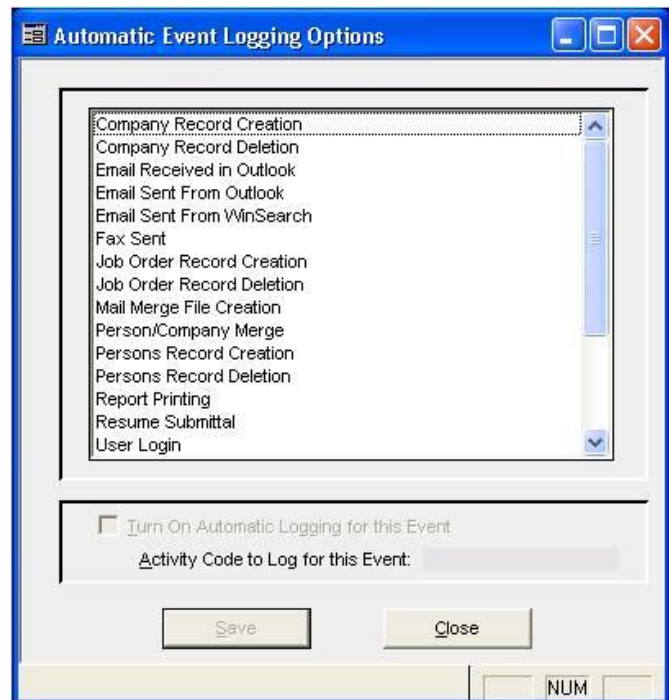
Overview

- Automatic Activities can be created to track events such as record creation, deletion, report printing, logins/logouts and Emails Sent & Received
- Automatic Settings are for **entire database** and not on a per-user basis
- To set Activities to auto-log, you must create the Activity Code **FIRST**
 - ✓ **Example:** You cannot set up an automatic event for **Persons Record Creation** if you do not have an Activity Code set up intended for that specific event (ie “New Person”, “New Persons Record”)
- Once an Automatic Activity has been “turned on” it is turned on for all events created in the **future** (ie, will not go back in time and log previous **Record Creations/Deletions**)

Available Automatic Activities

Accessed by **SETTINGS** → **SYSADM OPTIONS** → **AUTOMATIC ACTIVITY LOGGING**

- Company Record Creation
- Company Record Deletion
- Email Received in Outlook
- Email Sent from Outlook
- Email Sent from WinSearch
- Job Order Record Creation
- Job Order Record Deletion
- Mail Merge File Creation
- Person/Company Merge
- Persons Record Creation
- Persons Record Deletion
- Report Printing
- Resume Submittal
- User Login
- User Logout
- WinSearch Data Synchronization Activities
- WinSearch.Jobs Activities
- WSResume Batch Reprocessing Performed



Turning on an Automatic Activity

- To turn on automatic events, you must be logged in as SysAdm
- This event will turn on for All Users

Example: Track Persons Record Creation

- Edit Automatic Activity Logging by going to **SETTINGS** → **SYSADM OPTIONS** → **AUTOMATIC ACTIVITY LOGGING**
- Select **Persons Record Creation** from Logging Options
- Check “Turn on Automatic Logging for this Event”
- Select Activity Code to use for this event
 - ✓ Activity Code must be set up Prior to setting up Automatic Email Logging (cannot be done “on the fly”)

Using New Record Creation with Resume Processing

- Turning on [Persons Record creation](#) will log both when a new person’s record is manually created, and when a new person automatically created by [Resume Processing](#)
- If the resume was processed in MS Outlook, this event will also capture the email message body from the original candidate email in the Activity Notes
 - ✓ This will not occur when an additional document is added, or the resume is processed directly from MS Word
- See the [Automatic Email logging](#) section for more information about email logging

Automatic Email Logging

- Email Logging can be turned on for the following: [Email Sent From Outlook](#), [Email Sent From WinSearch](#), and [Email Received in Outlook](#).
- With Email Logging enabled, emails will be logged for those email addresses that are captured in your WinSearch database

Example: Enabling Automatic Email Logging

- Edit Automatic Activity Logging by going to **SETTINGS** → **SYSADM OPTIONS** → **AUTOMATIC ACTIVITY LOGGING**
- Select **Email Received in Outlook, Email Sent from Outlook or Email Sent from WinSearch** from Logging Options
- Check “Turn on Automatic Logging for this Event”
- Select Activity Code to use for this event
 - ✓ Activity Code must be set up Prior to setting up Automatic Email Logging

Automatic Email Logging Best Practices

- With Email Logging turned on, all emails that correspond to email addresses in the system will be logged, for all WinSearch Staff Reps
 - ✓ Exception 1: You are not logged into the WinSearch database when the email is sent or received
 - ✓ Exception 2: Email Address is not in the database
 - ✓ Exception 3: Email Address has been excluded from logging
- You can force WinSearch to log emails by selecting the WinSearch Check/Flag selected emails in database from the WinSearch toolbar in Outlook
- If you prefer NOT to have an individuals emails logged, right click on their email address in their WinSearch record and select **Exclude from Logging**.

Using Automatic Activities for Notification

- Automatic notifications to alert users that an event has occurred
- Notifications can be enabled for everyone or for specific users

Example: Notify Recruiters of a New Job Order

- Verify proper setup of the activity code by going to **SETTINGS → SYSADM OPTIONS → ACTIVITY CODE SETUP**
- Select **New Job Order** from the list of Activity Codes on the left hand side.
 - ✓ If you do not have an activity code set up for this purpose, you can create one at this time.
- In the lower right hand corner there are two lists of Staff Reps, one for Include and one for Notify.
- Selecting the box for Notify Staff Reps will send everyone associated with a linked record a notification.
- Check off the box for Notify these Users and select specific Staff Reps from the following list to notify only specific users.
- There is also an option to send emails to notify which works well for individuals that are not WinSearch users.
- See the *Turning on an Automatic Activity* section for instructions on how to turn on automatic activity logging for **Job Order Record Creation**.

Using Automatic Activities for Administrative Purposes

- Automatic activities can be utilized to track various administrative tasks such as report printing, when users log in and out of the system, and when records are merged or deleted.
- You can set up notifications for yourself for these events.

Example: Track when a person, company or job order is deleted

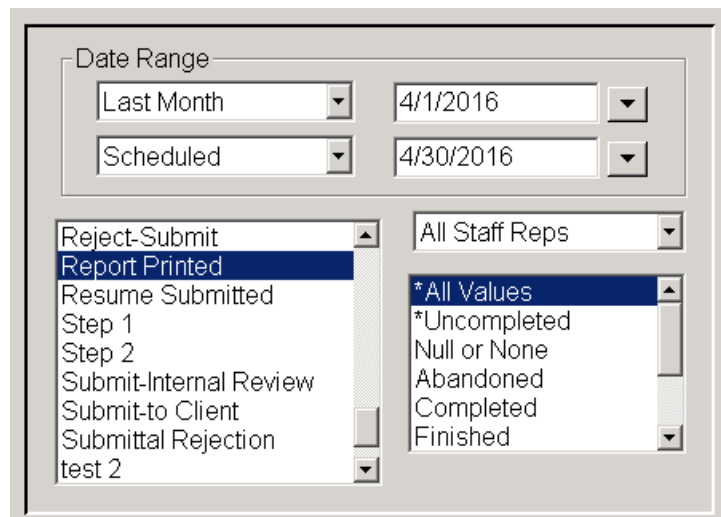
- Create an activity code such as "Deleted Person/Company/JO" by going to **SETTINGS → SYSADM OPTIONS → ACTIVITY CODE SETUP**
- Edit Automatic Activity Logging by going to **SETTINGS → SYSADM OPTIONS → AUTOMATIC ACTIVITY LOGGING**
- Select **Company Record Deletion** from Logging Options
- Check "Turn on Automatic Logging for this Event"
- Select Activity Code to use for this event
- Select **Job Order Record Deletion** from Logging Options
- Check "Turn on Automatic Logging for this Event"
- Select Activity Code to use for this event
- Select **Person Record Deletion** from Logging Options
- Check "Turn on Automatic Logging for this Event"
- Select Activity Code to use for this event

Example: Track when a report is printed in the system

- Edit Automatic Activity Logging by going to **SETTINGS → SYSADM OPTIONS → AUTOMATIC ACTIVITY LOGGING**
- Select **Report Printing** from Logging Options
- Check "Turn on Automatic Logging for this Event"
- Select Activity Code to use for this event
 - ✓ Activity Code must be set up Prior to setting up Automatic Email Logging (cannot be done "on the fly")

Displaying Automatic Activities for Report Printing

- Turning on **Report Printing** automatic activity creation will create an activity anytime a report is printed in WinSearch.
- To see all activities, go to **CALENDAR → DAILY PLANNERS**
- Adjust the entries to choose the date range, Activity Code, staff reps and status codes (see right).
- Select a report to display the information by going to **REPORTS → STANDARD REPORTS** if you want a more permanent record.



Resume Submittals

- Resume Submittal is a special type of automatic activity.
- This event is logged by selecting the **Resume Submittal** check box on the WinSearch Send Email screen.
- See the [Turning on an Automatic Activity](#) section for instructions on how to turn on automatic activity logging for **Resume Submittals**.

Example: Resume Submittal Automatic Activity from a Candidate Record

- Resume Submittals are best started from the job order, otherwise, start at the candidate or hiring manager.
- Select **Email Documents** on the resulting prompt.
 - ✓ If you initiate the submittal from the Contact record, select **Send Email To** instead.
- Click on the Attachments Button to attach the primary resume for the candidate, then compose the email as you normally would
- Before hitting Send Email, check off the **Resume Submittal** check box so this becomes a Resume Submittal event rather than an Email Sent event

The image shows a screenshot of the 'Send Email' dialog box. The dialog has a blue title bar and a light beige background. It is divided into three main sections: 'Email: To:', 'Attachments', and 'Subject:'. In the 'Email: To:' section, there is a text input field and a list of recipients. A blue oval highlights the 'Resume Submittal' checkbox in the top right corner of this section. The 'Attachments' section has a button labeled 'Attachments' and a list of attachments. The 'Subject:' section has a text input field and a large text area for the message body. At the bottom of the dialog, there are several checkboxes: 'Auto Spellcheck Email' (checked), 'Include Salutation' (checked), and 'Include Signature File' (checked). There is also an 'Add Attachment List' button. At the very bottom, there are 'Send Email' and 'Cancel' buttons, and a 'NUM' label on the right.