

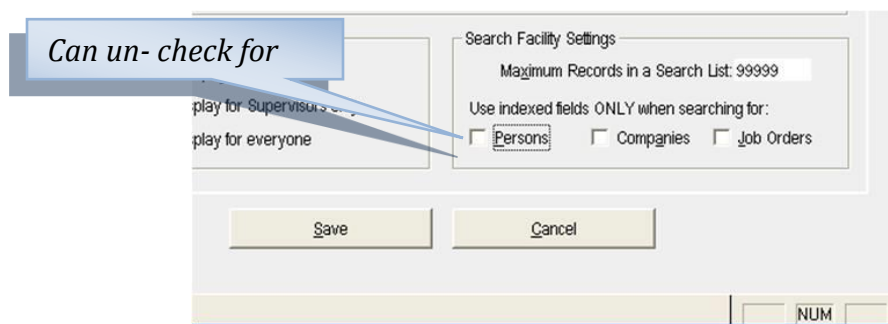
WinSearch Database Cleanup

Using Searches

Searches can be used to find records based on **date** information, such as records not updated since 2006.

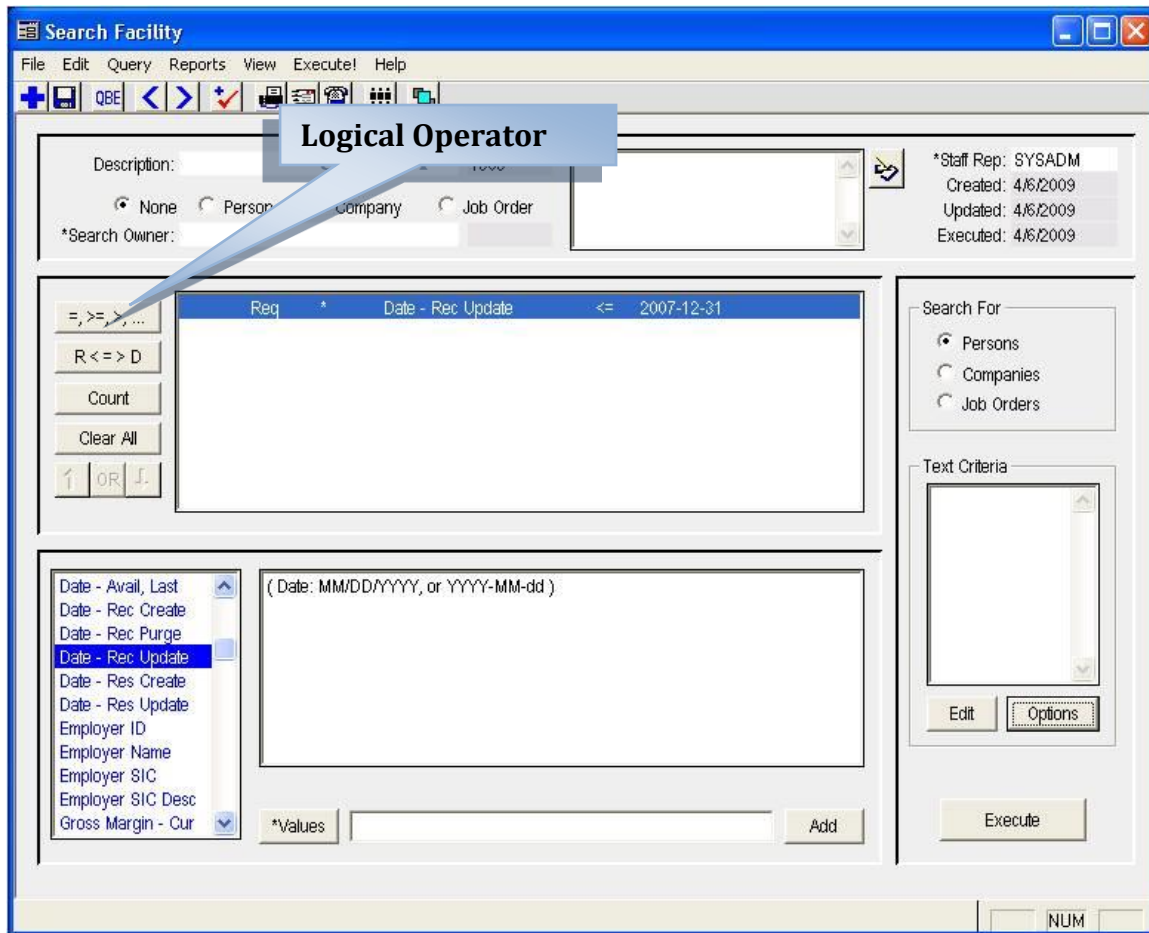
Searching on Date Ranges

- Begin a new Search for Persons
- Select Date Range Type to search on**
 - **Full list of Date Range options will **NOT** be available if **Indexed Fields** option is checked in **Search Facility Settings**
 - Check or change this option by going to **SETTINGS → SYSADM OPTIONS → MISCELLANEOUS OPTIONS**



Example: Records not updated since 2007

- Select **Date – Rec Update**
- Enter the date for the beginning of the period you want as your end point
 - **12/31/2007** – *this will encompass all of the year 2007*
- Change the Value of the range using the **LOGICAL OPERATOR** button (=, >=, >, ...) or right-click the criterion and select **SWAP OPERATOR** from the popup menu to Less than or Equal to the date
 - **DATE – REC UPDATE <= 2007-12-31**
 - This will set the date range to include 2007 and anything prior
 - *See figure below*

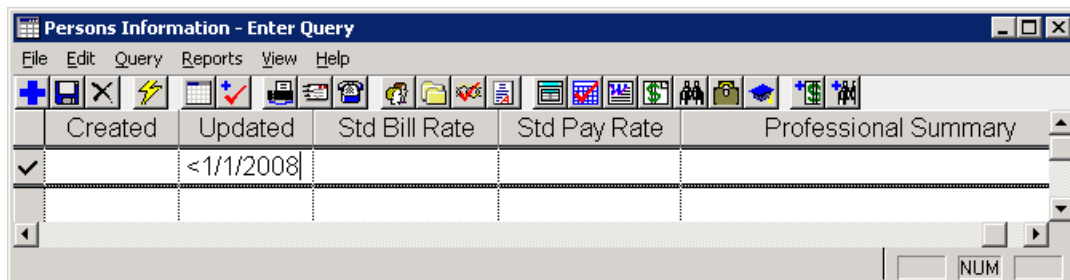


Using QBE

QBE can find records based on **date** information, such as records not updated since 2006.

Searching on Date Ranges

- Open a Persons table window (or form)
- Click the QBE button.
- Under Updated, put the date to use as in:



- Click Execute to see the list

Working with Data

The next step to finding the outdated records is working with the data. This could be in the form of a call list, or email blast or call list.

Email Blast


- Send out an email blast to outdated candidate records, possibly to just touch base, verify correct contact information, or request a current version of their resume if it is outdated.

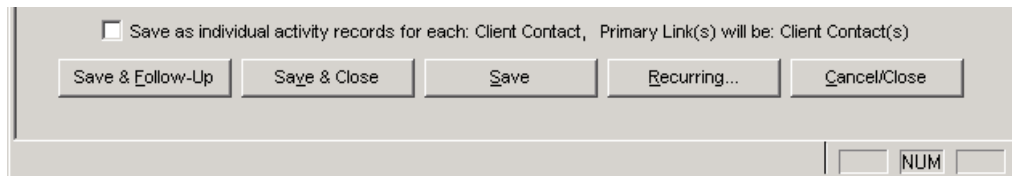
RSI Record Update

We are updating our records at RSI and wanted to be sure we had your current resume on file. Please send us a version of your current Resume if you wish to be considered for new job opportunities. If you do not wish to be contacted about new job opportunities, please let us know and we will remove you from our candidate list.

- Keep in mind, the recipient will see it with an "Its all about me" attitude.
- Only send 200 **or less** at a time
- Make sure to remove bouncing email addresses from your database.
- You would rather have them tell you "take me off your list" than flag you as a spammer.

Call List

- Set up activities to follow up and call the candidates/managers.
- Highlight the selected people and then create an activity with **F9** or the Create Activity toolbar button 
- Select the Save as Individual activity records ... before choosing a Save button



- You may need to remove companies by right-clicking the links and choosing Remove Companies From List
- If people include both candidates and hiring managers, set up separate activities for them.

Deleting People, Companies, and Job Orders

Deleting them requires selecting them and telling WinSearch to delete them. Deleting them from a Search List or Saved List only removes them from the list, they are still in the database.

To delete a person in a table menu:

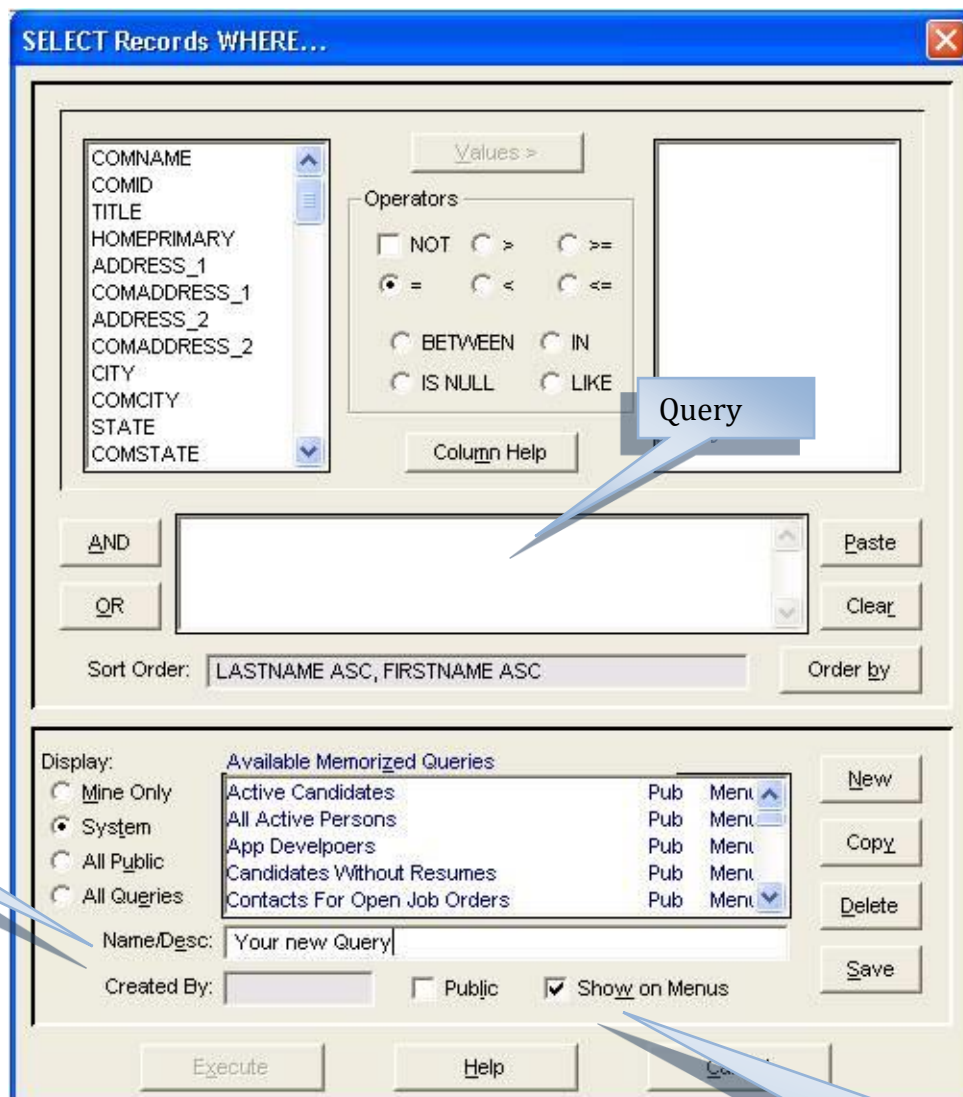
- Bring up person in the table window
- Mark with an X toolbar button or Delete key
- Delete directly
- Using Status for flagging which people to delete.

Using Queries to Identify Cleanup Needs

Advanced SQL Queries can be used to find records that may be missing information, such as phone numbers or email addresses. They can also help to easily locate duplicate records.

Records with Missing Information

- Begin an Advanced SQL query by launching the **Query Menu** in a Persons form or table then choosing the **Advanced SQL Query** command



Create Memorized
Relational Systems, Inc.

- Create a new SQL Query and copy and paste the scripts below into the **query box**
- You can **Save** and **name** these if you like to be used again or to show up in Menus as **Memorized Queries**

Missing information

- **Records with no Phone number**
ID not in (select id from phonenumber where entitytype='\$PER\$')
- **Records with no Email Address**
ID not in (select id from emailaddresses)
- **People with Bad Email Addresses**
id in (select id from emailaddresses where charindex('@', emailaddress)=0 or charindex('@', emailaddress)=1 or charindex('.', emailaddress)=0 or charindex('<', emailaddress)>0 or charindex('>', emailaddress)>0 or charindex(',', emailaddress)>0 or charindex(',', emailaddress)>0 or right(emailaddress,1)='.' or right(emailaddress,1)='-')
- **No phone number and no email address**
Id not in (select id from phonenumber where entitytype='\$PER\$') and id not in (select id from emailaddresses)

Resumes & Imported Documents

- **Candidates without Imported Documents**
id not in (select id from impfile where enttype='\$PER\$')
- **Candidates without Resumes**
(category=2 or category=3 or category=4) and id not in (select id from restext)
- **People with Blank Resumes**
id in (select id from restext where @LENGTH(restext)<10)
- **People with resumes documents but no WSResume document**
id not in (select id from restext) and id in (select id from impfile where enttype='\$PER\$')

No Recent Activity

- **Not updated within a Year Based on Activity**
Update_date<=@SYSDATE-365 and id not in (select entid from act_entities, activities where actid=id and enttype in ('\$PER\$', '\$CNT\$') and apptdate>=@SYSDATE-365)

Duplicate Records

You can also use Advanced SQL Queries to find Duplicate records in your database. Once these records are found, add them to a **Saved List** to Review & then Merge or Delete.

People

- **Potential duplicate people:**
Firstname+lastname in (select firstname+lastname from persons group by firstname+lastname having count(firstname+lastname)>1)
- **People with duplicate email addresses:**
Id in (select id from emailaddresses where emailaddress in (select emailaddress from emailaddresses group by emailaddress having count(emailaddress)>1))

Companies

- **Potential Duplicate Companies:**
name in (select name from company group by name having count(name)>1)
- **Companies without people working at them:**
id not in (select comid from persons)

Merging Duplicates

Merging Duplicate People

Once duplicate records have been located they can be merged, however it is important to identify a **Target Record** before beginning the merge

- Your **Target Record** will be the “Master Record” for this merge. The other duplicate record will be deleted
 - Target Record retains the values for all of the entries you see in the persons form, supplemental data, and demographic data with the exceptions of phone numbers, email addresses, key words and user-defined fields
 - This may mean looking at the notes of both versions of the person you are merging to verify that the one you will retain contains all notes you want to keep.

- If you do not have the ability to **Delete Records**, you do NOT have the ability to Merge
- The **Merge** process is available through the EDIT | MERGE WITH ANOTHER RECORD command.
 - This command is available only from a **Persons Form Window**
 - You **cannot** merge starting from a Table Window or a Form Window opened from a table.

Green Entries merge – Don't worry about these

Yellow entries often merge – Only worry if the same UDF is in both people.

Merging a Persons Record

- Bring up the **Target Record** (person that you want to keep) in a **Form Window**
 - *This must be a form window with the full set of toolbar buttons and not a form window opened from a table window*
- Select **EDIT | MERGE WITH ANOTHER RECORD**
 - WinSearch displays a message alerting you that this command merges another person into the currently selected one – Select OK

- Use **QBE** to bring up the duplicate person that you want merged into the table window (*Tip – Query by IDNUMBER*)
- With the Duplicate Person selected in the Table Window, double click the row header or choose the **SELECT COMMAND**
 - Verify the correct people are shown because if you merge the wrong ones, you cannot get them back!
- Select OK and complete Merge

Merging Drop-Down List Entries

Entries such as Titles have drop-down lists containing those entries set up for your database. You may need to periodically merge some entries.

To help you Understand, here is what happens when you merge the job title Cat Herder into the job title Zoo Director.

Start Off With



Cat Herder



Zoo Director

Job Title List includes:

Cat Herder

Zoo Director

Delete Zoo Director entry



Cat Herder



Zoo Director

Job Title List includes:

Cat Herder

Rename Cat Herder to Zoo Director



Zoo Director



Zoo

Director

Job Title List includes:

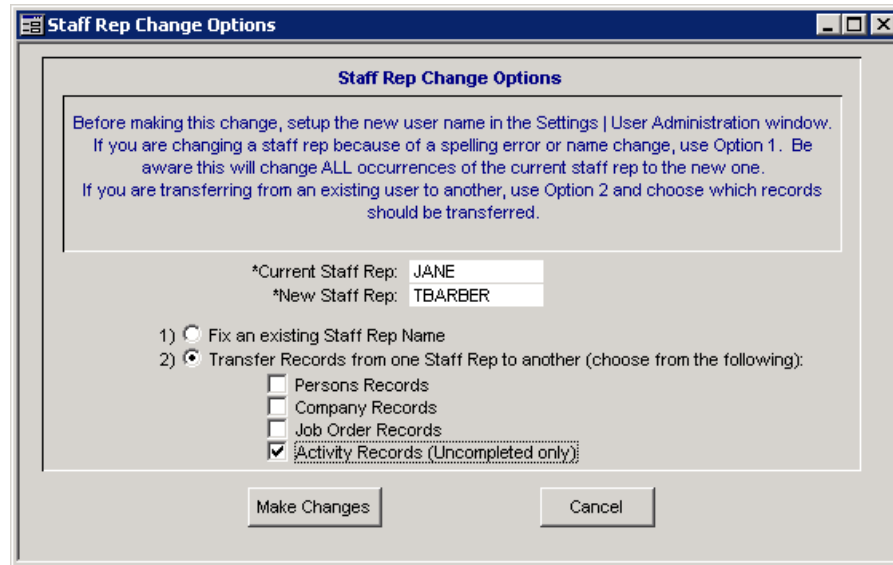
Zoo Director

The steps you perform are:

- Bring up the Job Title list with the **LISTS → PERSONS LISTS → JOB/POSITION TITLES** command.
- Highlight Zoo Directory and click X button.
- Choose the **FILE → DELETE** command and OK to the confirmation prompt.
- Highlight Cat Herder
- Type Zoo Director
- Choose the **FILE → SAVE** command and Yes to the prompt of renaming the existing entries.

Transferring Data Between Staff Reps

When staffing changes, you will need to periodically re-assign whom is responsible for candidates, managers and incomplete activities. WinSearch helps automate this with the Staff Rep Administration feature. When you choose **SETTINGS** → **SYSADM OPTIONS** → **STAFF REP ADMINISTRATION**, you see a dialog box like the following:



The screenshot shows a dialog box titled "Staff Rep Change Options". Inside the dialog, there is a text box with the following instructions: "Before making this change, setup the new user name in the Settings | User Administration window. If you are changing a staff rep because of a spelling error or name change, use Option 1. Be aware this will change ALL occurrences of the current staff rep to the new one. If you are transferring from an existing user to another, use Option 2 and choose which records should be transferred." Below the text box, there are two input fields: "*Current Staff Rep: JANE" and "*New Staff Rep: TBARBER". There are two radio button options: "1) Fix an existing Staff Rep Name" (unselected) and "2) Transfer Records from one Staff Rep to another (choose from the following):" (selected). Under option 2, there are four checkboxes: "Persons Records" (unchecked), "Company Records" (unchecked), "Job Order Records" (unchecked), and "Activity Records (Uncompleted only)" (checked). At the bottom of the dialog, there are two buttons: "Make Changes" and "Cancel".

From this dialog box, you can choose the users and what type of staff rep transfer you want. #1 is often for when a name has been misspelled or someone's marriage status changes. #2 is for when staffing changes and you need to reassign people, companies, job orders and/or activities.

Remember: When you delete a user with **SETTINGS** → **USER ADMINISTRATION**, that user's name will continue to appear on the activities that they created and wherever that username was used and not swapped with another user as described above.