

SYSADM Functions and Features

Overview

This covers many of the configuration choices that you can make for how your company uses WinSearch. Thus, there are for many things, no "right" answer but instead, "right for you." Thus, you will need to think of how your businesses' processes function and how you want the software to adapt to you your needs.

Some settings cannot be done by anyone EXCEPT the user whom logs in with the user name of SYSADM. This often means logging on as yourself and then using the Settings → Change Login command to change the login from yourself to SYSADM. The SYSADM password is whatever the SYSADM password happens to be for your database.

In several locations, you will see terms like "average user" and "supervisory user." An "average user" includes all users that are not SYSADM. A "supervisory user" is a user that has the Supervisory Authority check box selected for them when you highlight their user name in the dialog box displayed with the Settings → User Administration command.

There are a couple of overall commands that affect many settings. You will want to keep them in mind for many of the settings covered after that.

Note: Make sure that your backups run!

The screenshot shows the 'WinSearch User Administration' dialog box. It is divided into several sections:

- WinSearch Users:** A table listing users: GABBY, GLAWRENCE, and SYSADM, all with 'Name not available'.
- User Information:** Fields for User Name, Password, Confirm PW, First Name, Last Name, Nickname, Email Addr, Office Phone, and Fax Phone.
- Database Permissions for Selected User:** A grid of checkboxes for Create, Update, and Delete actions across Persons, Companies, Orders, and KW Dict.
- Miscellaneous Permissions for Selected User:** Checkboxes for Supervisor Authority, No Print Limit, Allow Sync of Outlook Calendar, Allow Export of Outlook Contacts, and Allow Import & Sync of Persons FROM this Database. A warning message is displayed below.

Buttons at the bottom include: Clear Old Users, Add User, Drop User, Change PW, Save, and Close.

Settings → User Administration

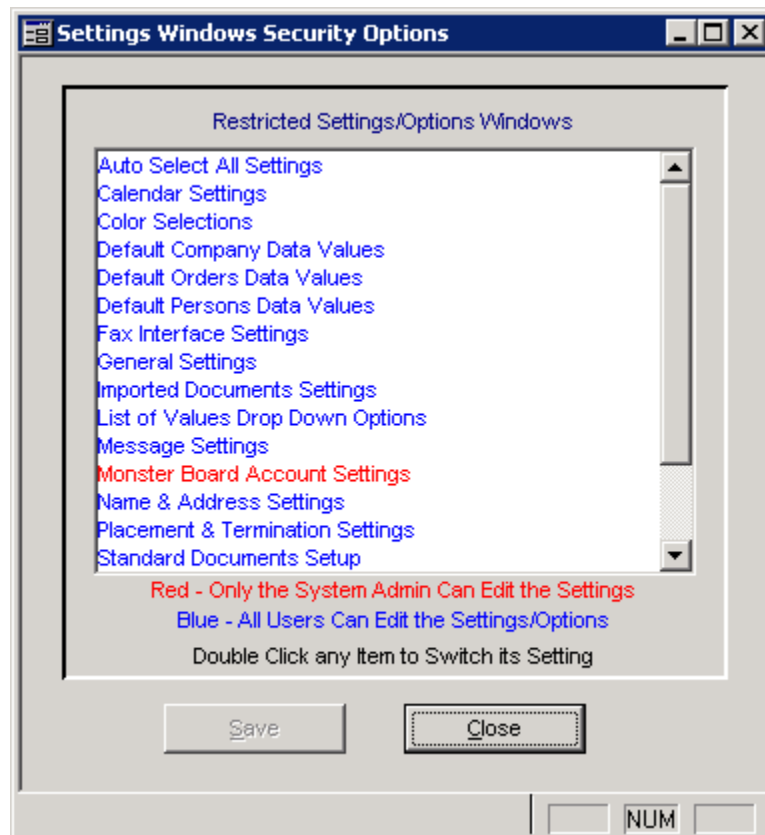
This command not only sets up users, this sets the entries for the Staff Rep drop-downs. It also sets permissions for who can add, see and delete people, companies, job orders and key words. SYSADM sets what privileges a user has for Outlook synchronization of contacts and calendar. If print limits are imposed for other users, you can select users here whom are not affected by the print limits. Users can also be made to be supervisory users. Here are the affects of making someone a supervisory user.

- When Staff Rep entries are locked down, supervisory users can change staff rep entries. Staff Rep entries are locked down with the Settings → SYSADM Options → Miscellaneous Options command and clearing the Users Can Change Staff Rep Entries.
- Can view the Demographic Data form window for people when SYSADM sets demographic data to solely appear for supervisory users. The level of users that can see the Demographic Data window is set with the Settings → SYSADM Options → Miscellaneous Options command in the Persons Demographic Data section.
- Can copy entire rows of data from WinSearch table windows when SYSADM has set this ability to be limited to only supervisory users. The level of users that can use the Edit → Copy command in a table window to copy entire rows of data is set with the Settings → SYSADM Options → Miscellaneous Options command in the Allow Table Row Copy to Clipboard For section.
- Can see people whom are marked as Private in their Status entry when private stock is turned on. Private Stock is turned on with the Settings → SYSADM Options → Miscellaneous Options command and selecting the Enable Private Stock check box.
- Ability to select the Edit → Merge With Another Record command to merge people and companies when SYSADM sets this ability to only supervisory users. This permission is limited to supervisory users with the Settings → SYSADM Options → Miscellaneous Options command and clearing the Allow Users to Merge Persons/Companies check box. Besides this setting, a user must have deletion privileges for people and/or companies as SYSADM sets through the Settings → User Administration command.
- Mark person's email addresses to be blocked from logging when this ability is limited to supervisory users. This is set with the Settings → SYSADM Options → Miscellaneous Options command and selecting the Only Supervisors Can Exclude Emails check box.
- Reprocess resumes when the privilege is limited to supervisory users. This is set with the Settings → SYSADM Options → Miscellaneous Options command and clearing the Allow Non-Supervisors To Run Batch Reprocessing check box.
- Work with key words through the Key Word Merge Utility. This utility can be invoked through the SETTINGS → UTILITIES → START KWMERGE command. This utility is for taking 2 key words and combining them into one.

A user, other than SYSADM, can only be logged in once unless SYSADM chooses the Settings → SYSADM Options → Miscellaneous Options command and choose the Allow Duplicate User Logins check box.

Settings → SYSADM Options → Window Security Options

This sets which commands in the Settings → User Options and Settings → Display Options that the user can actually see. When they are blue, users can select that menu command. When they are red, users cannot. Double-click an item in this list to change its color.

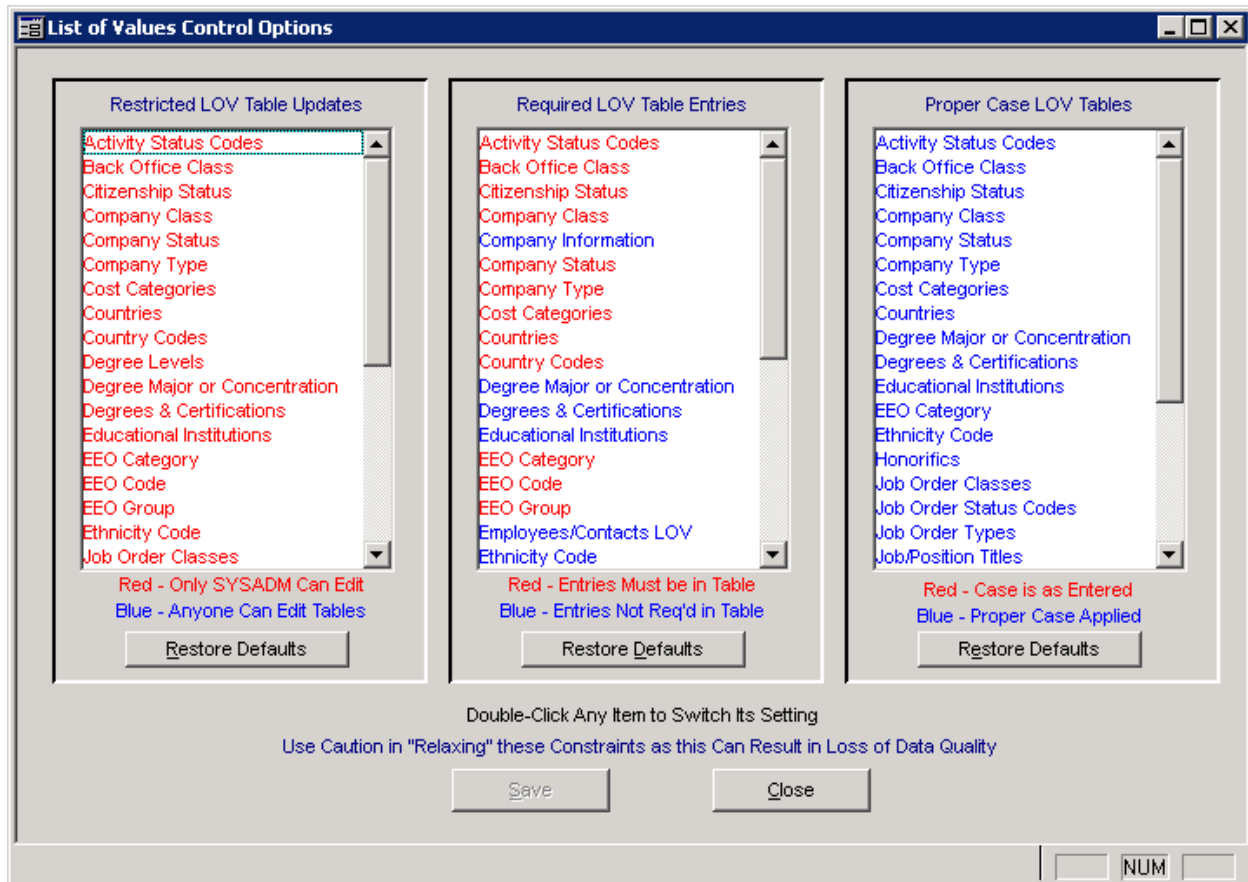


Even if the user doesn't have permissions to the window, the user still gets SYSADM settings from what settings SYSADM had at the time that the user initially logs in. This means that if SYSADM makes Name & Address red, users will continue to use the settings that SYSADM happened to have in place when they logged in the first time, even after SYSADM has made updates to those settings. Thus, you likely want to have these items blue unless you really don't want the user tweaking their settings in that area.

The one command in the Display menu that is not controlled by the above dialog box is the Open SQL Command Monitor. This command is made disabled or enabled by clearing or selecting the Allow Users to Run SQL Monitor check box in the Settings → SYSADM Options → Miscellaneous Options command.

Settings → SYSADM Options → LOV Control Options

Here is where you choose whether the ordinary user can make adjustments to a LOV table, whether the ordinary user can enter things not in a drop down list and whether the entry gets some automatic formatting. Thus, this dialog box does 3 things:



- Whom can make adjustments to a particular LOV table
- Whether users are allowed to make entries that do not match a pre-existing entry
- Whether the entries made for that item are made proper case with the first letter of each word being uppercase and the rest of the word being lowercase.

SYSADM can double-click any item listed to change the behavior.

Persons Customizations

Let's look at the Persons Form and where you go to make adjustments for each of the entries.

1. Settings → Display Options → Names and Addresses – Here, decide if you want to see the name as Mary Smith or Smith, Mary. Choose whether Mac and Mc names get certain automatic capitalization, whether the middle name and honorific (Mr./Ms.) appear, and whether WinSearch fixes the capitalization of names entered in lower case.
Whether duplicates are checked is turned on with Settings → SYSADM Options → Miscellaneous Options and the Duplicate Checking for Persons check box.
2. Allowed to enter company names not in the list? That is Settings → SYSADM Options → LOV Control Options. The companies listed are those companies added to the database.
3. Allowed to enter Titles not in the list? That is Settings → SYSADM Options → LOV Control Options. The titles themselves are found in Lists → Persons Lists → Job/Position Titles.
4. Use the Settings → Display Options → Names and Addresses command to set how WinSearch capitalizes the address when typed in lowercase.
5. States lists are found in Lists → General Lists → State& Provinces

6. Country lists are found in Lists → General Lists → Countries & Country Codes. Thus, if you use the country area for Counties instead, you can remove the companies and add the most frequently used counties. Granted, you can use ZIP code distance searches in lieu of tracking candidates by county.
7. Phone number formatting is done with the Settings → Phone Controls → Phone Number Formats command. If you use the Dialer, you may want your area code selected. The initial settings match numbers for the U.S. and candidate. Thus, you only want to make changes if you predominantly have non-North America phone numbers. Settings → Phone Controls also has options for choosing whether double-clicking a phone number edits or calls that number.
8. What happens when you double-click an email address is set with Settings → User Options → General Settings on the Double Click Edits Email Addresses. Remove that check mark and then when you double-click an email address, you start the process of sending an email. Specific users can be prevented from sending blast emails with the Settings → User Options → Persons Settings and the Do Not Send Bulk Email check box.
9. User defined fields are adjusted with the Settings → SYSADM Options → User Defined Field Setup command. There, the dialog box is available for creating, adjusting and deleting UDFs that you may have. However, for LOV UDF entries, those are made with the Lists command then choosing Persons List, Company List or Job Job Order List before choosing User Defined Fields and the UDF LOV list that you want to tweak. The WinSearch User Defined Field Setup dialog box is also available when you can also right-click a person's UDF field entry box and choose UDF Setup Options. When logged in as SYSADM, you can make changes. When not SYSADM, you cannot.
10. Settings → User Options → Persons Settings has the Auto Date Stamp Entries in Notes for whether editing Notes automatically puts the date, time and user.
11. Dates in WinSearch do not have their format set through WinSearch. Instead, the format is selected outside of WinSearch through Control Panel and Settings options.
12. Category is the one drop-down box that you cannot change. However, when you add new people, you can provide the initial category with the Settings → User Options → Persons Settings command. The WinSearch add-in for Outlook and for Word have their own setting for initial Category entries when people are added to the database using one of the add-ins. SYSADM can enforce users to be unable to change the initial category a person is set to with the Settings → SYSADM Options → Miscellaneous Options check box and then clearing the Allow Users to Override Category Default.
13. Staff Rep shows the users identified with the Settings → User Administration command. The exception being if the Staff Rep entry is an entry that is no longer a user. SYSADM determines how flexible changing staff rep can be. Settings → SYSADM Options → Miscellaneous Options has the Users Can Change Staff Rep Entries. When this item is not checked, the average user cannot change the staff rep entry for a person UNLESS it is their own name changing it to someone else. Now, if the Users Can Change Staff Rep Entries check box is empty, if a user has a Supervisory status, they are allowed to change staff reps. Supervisory status can

be handy for administrative and managerial roles. The Supervisory status is added and removed by SYSADM with the Settings → User Administration command.

Staff Rep always starts out for people whom added the person in WinSearch. For people added via the WinSearch add-in in Outlook or in Word, the users can have a different Staff Rep entry used as the initial entry. This choice is made through those add-ins.

14. Status choices are set through the Lists → Persons Lists → Persons Status Codes command. Initial Status entries for people added from within WinSearch are set through the Settings → User Options → Persons Settings command. Status entries for people added via the WinSearch add-in in Outlook or in Word are set through those add-ins. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning. If status is set to Private and Private Stock is turned on, then the person follows the special behavior for private stock people. Turning Private Stock on is done with the Settings → SYSADM Options → Miscellaneous Options command and the Enable Private Stock check box.
15. Type choices are set through the Lists → Persons Lists → Persons Type Codes command. There is not a method for setting the initial Type entries for people added within the WinSearch program however, for people added via the WinSearch add-in in Outlook or in Word the initial Type entry for those people can be set through those add-ins. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.
16. Class choices are set through the Lists → Persons Lists → Persons Class Codes command. There is not a method for setting the initial Class entries for people added within the WinSearch program however, for people added via the WinSearch add-in in Outlook or in Word the initial Class entry for those people can be set through those add-ins. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.
17. Source choices are set through the Lists → Persons Lists → Persons Referral Sources Codes command. There is not a method for setting the initial Source entries for people added within the WinSearch program however, for people added via the WinSearch add-in in Outlook or in Word the initial Source entry for those people can be set through those add-ins. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.
18. Location Preference is freeform text and its behavior cannot be changed.
19. Reports To shows the Employees at a company. SYSADM can prevent users from typing a name not on that list with the Settings → SYSADM Options → LOV Control Options command and making Employees/Contacts LOV red.
20. SIC Code entries are made with the Lists → Company List → Standard Industrial Codes command. Whether users can enter non-matching items or can modify the choices in that drop-down list are done through the Settings → SYSADM Options → LOV Control Options command.

(123978 Abbott, M) - Supplemental Data

File Edit View

*Reports To: Created By: GLAWRENCE
Assistant: Updated By: GLAWRENCE
Loc. Pref: Relocate: No
*Source: IT Data Group Will Travel: 25%
Fee To: Salutation: Marcia
Terms: Spouse/Other:
*SIC Code: Nickname:

Cur Pay Rate: \$0.00 Std Pay Rate: \$0.00 Start Comp\$: \$0
Cur Margin: \$0.00 Std Margin: \$0.00 End/Cur Comp\$: \$0
Cur Bill Rate: \$0.00 Std Bill Rate: \$0.00 Req Comp\$: \$0
OT Rate: \$0.00 First Avail: Start Date:
OT After: 0 Last Avail: End Date:
 OT Exempt Deductions: Purge Date:
*Pay Type:

Home Address is Primary Work Address
Address 1:
Address 2:
City, *St/Prv:
Code, *Cntry:

Notes: Internal Comments:
Industry: Hospitals
Professional Summary: Responsibility Description:

NUM

21. Relocate and Will Travel have their initial entries set through the user's Settings → User Options → Persons Settings command.
22. Professional Summary and Responsibility Description, just like Notes can have their entries automatically date/time/user stamped. Whether this is done is set with the Settings → User Options → Persons Settings command.
23. Demographic data can be available for people. SYSADM makes that available or hidden with the Settings → SYSADM Options → Miscellaneous Options command. There in the lower left are the options for whether Demographic data appears for no one, just supervisory users or everyone. If available for a user, the Demographic Data window is available through the View menu on Persons to give you access to a group of additional entries. Most of these entries have their

choices set through commands found under Lists → Persons List. Now, whether users can adjust those lists or users can make non-matching entries is done through the Settings → SYSADM Options → LOV Control Options command.

Email Addresses (#8)

These are settings that affect how email functions:

SYSADM can use the Settings → SYSADM Options → Miscellaneous command to set how WinSearch handles excluded email addresses. Email addresses can be marked for excluding so that emails that come or go to the selected email address do not get logged under that person, assuming email logging is turned on. This can be handy if your accountant or lawyer is in the database and you do not want those emails logged. Assuming that email addresses can be marked for exclusion, SYSADM can set whether only supervisory users can make email addresses excluded. There are three options to choose what happens when an email to potentially be logged arrives and that email has addresses where some are included and some are excluded. You can have those emails logged to everyone, just the non-excluded users, or not logged at all.

SYSADM can use the Settings → SYSADM Options → Miscellaneous command to set when bulk emailing is triggered. Email addresses can be marked No Bulk Emails to have that person and their email addresses not receive emails when a mailing is sent out that exceeds a specified number of people. SYSADM sets what that specified number of people with the Number Indicating Bulk Email. When a list of people to receive an email meets or exceeds this number, those with No Bulk Emails are excluded.

SYSADM can use the Settings → SYSADM Options → Miscellaneous command to set the maximum number of attachments that a user can send out from WinSearch. This is limited with the Maximum Number of Attachments text box.

Settings → User Options → General Options is where a user sets whether to use XMAPI or Simple MAPI. XMAPI is preferred as with Simple MAPI, you often have to use a utility like ClickYes to bypass the additional security prompts.

Whether you get an additional copy of every email you send from WinSearch is set by whether you have the email address entered with the Settings → User Options → General Options command. Leave Email Address empty to *not* get those copies in your Inbox in addition to the copy you already see in your Sent Items. When you leave Email Address empty, also clear the Warn for Missing Email Address check box so you do not see unnecessary reminders.

If you explicitly need to identify the profile for the email account and the password that the profile requires, then enter them with the Settings → User Options → General Options command. Otherwise WinSearch uses whatever default email profile you have set up – which is actually preferable in most occasions.

The signature that each user has for the emails that they send from WinSearch is set in the Signature text box with the Settings → User Options → General Options command. Press F2 and pick the *text* file to use.

When you send John Doe's resume from WinSearch, you can have that file named one of two ways. The way the file is named depends on the Use Persons Name/Use File Description as Attachment Name set of option buttons. When Use Person's Name as Attachment Name is selected, John Doe's resume is emailed as a document named John Doe. If Use File Description as Attachment Name is selected, the name of John Doe's document is set by the Documents table and what appears in the File Description column.

Persons Documents					
File Description	Primary	File Name	Created	Updated	
Resume	<input type="checkbox"/>	2011_232684.docx	7/27/2017	7/27/2017	
Old Resume	<input type="checkbox"/>	2011_8574.xls	3/18/2008	7/27/2017	
Talent	<input type="checkbox"/>	2011_8575.xls	3/18/2008	3/18/2008	
Christmas Cards	<input type="checkbox"/>	2011_8576.xls	3/18/2008	3/18/2008	

Key Words (#24)

There are several settings that affect how key word management is done.

- Whether a particular user has permission to create, modify or update key words, SYSADM sets this with the Settings → User Administration command.
- For Merging key words, select Settings → Utilities → Start KW Merge.
- Whether individual users can reprocess resumes is set with the Settings → SYSADM Options → Miscellaneous Options command and the Allow Non-Supervisors to Run Batch Reprocessing check box.
- New key words and categories can require having a description based on the Key Words Require a Description and Key Words Categories Require a Description after selecting the Settings → SYSADM Options → Miscellaneous Options command.
- Key Word processing can be turned off with the Settings → SYSADM Options → Miscellaneous Options command and the Disable Automatic KW Processing in WSResume check box.
- Key Words are reprocessed through the Settings → Utilities → WSResume Batch Reprocessing command.
- Key word weighting is turned on and fine tuned with the Settings → SYSADM Options → Key Word Weighting Setup command. Here you can choose which system you want to use, initial values and how the key word weighting behaves.

Persons and Company Menu Customizations

- Whether the Edit → Copy command is available for all users, only supervisory users or no one is set through the Settings → SYSADM Options → Miscellaneous Options command and the Allow Table Row Copy to Clipboard For options.

- Whether the Edit → Merge With Another Record command is available from the Form menu is set through the Settings → SYSADM Options → Miscellaneous Options command and the Allow Users to Merge Persons/Companies check box.

Company Customizations

Let's look at a company in the Company Form window and where you go to make adjustments for each of the entries.

The screenshot shows a software window titled "Company Information - 1 Records Selected". The window contains several sections:

- Company/Office:** BF Goodies, Inc. (109) (Callout 4)
- Address 1:** 432 Embassy Way (Callout 1)
- Address 2:** (Callout 2)
- City, *St/Prv:** Akron OH (Callout 3)
- Code, *Cntry:** 44313
- *Staff Rep:** RSI (Callout 5)
- *Status:** Restricted (Callout 7)
- Level:** 1 Main (Callout 11)
- Sales (000s):** \$1,000,000,000 (Callout 8)
- *Type:** (Callout 9)
- Created:** 2/1/1991 (Callout 12)
- Num Empl:** 56,000
- *Class:** (Callout 6)
- Updated:** 3/11/1991 (Callout 12)
- *SIC Code:** 300 (Callout 6)
- Jobber and Miscellaneous Product**
- Main Co.:** (Callout 10)
- Division:** (Callout 10)
- Region:** (Callout 10)
- Description:** Major automotive supplier and automotive products manufacturer.
- User Defined Fields:**
 - Credit Limit: \$0 (Callout 13)
 - Credit Risk: Unknown (Callout 13)
 - VMS: No (Callout 13)
- *Key Words:**
 - CAE: 0 (Callout 15)
 - CAM: 0 (Callout 15)
 - CHEMICAL: 0 (Callout 15)
 - COATINGS: 0 (Callout 15)
 - COBOL: 0 (Callout 15)
 - CONTROL: 0 (Callout 15)
 - ENGINEERING: 0 (Callout 15)
 - FORTRAN: 0 (Callout 15)
 - MANUFACTURING: 0 (Callout 15)
 - OSHA: 0 (Callout 15)
 - PETROLEUM: 0 (Callout 15)
 - PL/1: 0 (Callout 15)
 - POLYMER: 0 (Callout 15)
 - RAW MATERIAL: 0 (Callout 15)
 - REGULATIONS: 0 (Callout 15)
 - TOXIC WASTE: 0 (Callout 15)
- AP Contact:** Pat, Polenski Phone: (216) 374-5324 (Callout 14)
- AP Contact:** Pat, Polenski Fax: (216) 374-8734 (Callout 14)

1. Settings → Display Options → Names and Addresses sets how WinSearch capitalizes the address when typed in lowercase. Whether duplicates are checked is turned on with Settings → SYSADM Options → Miscellaneous Options and the Duplicate Checking for Companies check box.
2. States lists are found in Lists → General Lists → State & Provinces
3. Country lists are found in Lists → General Lists → Countries & Country Codes. Thus, if you use the country area for Counties instead, you can remove the companies and add the most frequently used counties. Granted, you can use ZIP code distance searches in lieu of tracking candidates by county.
4. Phone number formatting is done with the Settings → Phone Controls → Phone Number Formats command. If you use the Dialer, you may want your area code selected. The initial settings match numbers for the U.S. and candidate. Thus, you

- only want to make changes if you predominantly have non-North America phone numbers. Settings → Phone Controls also has options for choosing whether double-clicking a phone number edits or calls that number.
5. Staff Rep shows the users identified with the Settings → User Administration command. The exception being if the Staff Rep entry is an entry that is no longer a user. SYSADM determines how flexible changing staff rep can be. Settings → SYSADM Options → Miscellaneous Options has the Users Can Change Staff Rep Entries. When this item is not checked, the average user cannot change the staff rep entry for a person UNLESS it is their own name changing it to someone else. Now, if the Users Can Change Staff Rep Entries check box is empty, if a user has a Supervisory status, they are allowed to change staff reps. Supervisory status can be handy for administrative and managerial roles. The Supervisory status is added and removed by SYSADM with the Settings → User Administration command.
 6. SIC Code entries are made with the Lists → Company Lists → Standard Industrial Codes command. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.
 7. Status choices are set through the Lists → Company Lists → Company Status Codes command. Initial status entry is set through the Settings → User Options → Company Settings command. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.
 8. Type choices are set through the Lists → Company Lists → Company Type Codes command. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.
 9. Class choices are set through the Lists → Company Lists → Company Class Codes command. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.
 10. There are no adjustments for the hierarchy entries such as Parent, Region and Division Name.
 11. While theoretically, you can alter the choices for Level, this should not be done without technical support assistance.
 12. Dates in WinSearch do not have their format set through WinSearch. Instead, the format is selected outside of WinSearch through Control Panel and Settings options.
 13. User defined fields are adjusted with the Settings → SYSADM Options → User Defined Field Setup command. There, the dialog box is available for creating, adjusting and deleting UDFs that you may have. However, for LOV UDF entries, those are made with the Lists command then choosing Persons List, Company List or Job Order List before choosing User Defined Fields and the UDF LOV list that you want to tweak. The WinSearch User Defined Field Setup dialog box is also available when you can also right-click a person's UDF field entry box and

choose UDF Setup Options. When logged in as SYSADM, you can make changes. When not SYSADM, you cannot.

14. Settings → User Options → Company Settings has the Auto Date Stamp Entries in Notes for whether editing Notes automatically puts the date, time and user.
15. Key words for companies have the same customization settings that you have for key words for people.

The screenshot shows a window titled "(109 BF Goodies,) - Client Data". It contains several fields with yellow callout circles:

- 16: Standard Benefits dropdown menu (value: 30/20 coverage with \$200 deductible)
- 17: Relocation Policy dropdown menu (value: Relocation costs, housing resale option)
- 18: Special Perks dropdown menu (value: To Be Determined)
- 19: *A/P Title text field (value: Accountant)
- 20: *A/P Contact text field (value: Pat, Polenski)
- 21: Phone text field (empty)
- 22: Fee Terms dropdown menu (value: Standard Schedule)
- 23: Pay Terms dropdown menu (value: Net 30 Days)

16. Standard Benefits has the initial entries set through the user's Settings → User Options → Company Settings command. Having this entry empty means that the Standard Benefits line hides on certain reports when the entry is empty. The entry here becomes the starting Standard Benefits entry for job orders created for this company.
17. Relocation Policy has the initial entries set through the user's Settings → User Options → Company Settings command. Having this entry empty means that the Relocation Policy line hides on certain reports when the entry is empty. The entry here becomes the starting Relocation Policy entry for job orders created for this company.
18. Special Perks has the initial entries set through the user's Settings → User Options → Company Settings command. Having this entry empty means that the

Special Perks line hides on certain reports when the entry is empty. The entry here becomes the starting Special Perks entry for job orders created for this company.

19. Allowed to enter Titles not in the list? That is Settings → SYSADM Options → LOV Control Options. The titles themselves are found in Lists → Persons Lists → Job/Position Titles.
20. A/P Contact shows the Employees at a company. SYSADM can prevent users from typing a name not on that list with the Settings → SYSADM Options → LOV Control Options command and making Employees/Contacts LOV red.
21. Phone numbers here only appear for A/P contact where the contact is in the database. Changes on the person's form reflect here and vice versa. Other than that, it is a standard phone number box with the same behavior as the phone number box for people.
22. Fee Terms has the initial entries set through the user's Settings → User Options → Company Settings command. Having this entry empty means that the Fee Terms line hides on certain reports when the entry is empty. The entry here becomes the starting Fee Terms entry for job orders created for this company.
23. Pay Terms has the initial entries set through the user's Settings → User Options → Company Settings command. Having this entry empty means that the Pay Terms line hides on certain reports when the entry is empty. The entry here becomes the starting Pay Terms entry for job orders created for this company.

Job Order Customizations

Let's look at a job order in its form windows and where you go to make adjustments for each of the entries.

The screenshot shows a software window titled "Job Orders - 21 Records Selected". The interface includes a menu bar (File, Edit, Query, Reports, View, Help) and a toolbar. The main form is divided into several sections:

- Top Left:** Job order details including "Ord Desc", "Company", "Phone", "Status", "Type", "Class", "Openings", and "Num Filled". Callouts 1-9 point to these fields.
- Top Right:** Hiring Manager information including "Title", "Name", "Phone", and "HR Name". Callouts 11-12 point to these fields.
- Bottom Right:** Key Words list including ACCESS, ANDROID, ARCHITECTURE, BASIC, COMMUNICATIONS, COMPUTER, CSS, DESIGN, EDUCATION, FRENCH, JAVA, MEDICAL, PUBLISHING, RESEARCH, SOFTWARE, TECHNOLOGY, and TRAVEL. Callout 18 points to this list.
- Bottom Left:** Compensation table with columns for Salary, Commission, and Bonus, showing minimum, target, and maximum values. Callouts 4-6 point to these values.
- Bottom Center:** User Defined Fields section with a "Duration" field and "Enter Here" button. Callout 10 points to this field.
- Bottom Right (Lower):** "Minimum Requirements" and "Position Description" dropdown menus. Callouts 13-15 point to these fields.
- Bottom Right (Lower):** A text area containing a note: "It isn't the same position but close enough. One exception: Need French fluency. It isn't because of the App UI but rather the integrating software and are partner is in France." Callout 16 points to this text.
- Top Right (Upper):** "Web Status" dropdown menu set to "On Hold". Callout 17 points to this field.

1. Settings → SYSADM Options → Miscellaneous has a Job Orders Requires a Company check box that when selected, requires a company from the database to be selected for the job order to be saved.
2. Phone numbers under the company or the two hiring managers for the job order, or the A/P Contact shows the phone numbers for the company or person shown above. Phone number formatting is done with the Settings → Phone Controls → Phone Number Formats command. If you use the Dialer, you may want your area code selected. The initial settings match numbers for the U.S. and candidate. Thus, you only want to make changes if you predominantly have non-North America phone numbers. Settings → Phone Controls also has options for choosing whether double-clicking a phone number edits or calls that number.
3. Use the Settings → User Options → Job Order Settings command to set whether job orders start off as Perm or Contract. This also affects whether the box below this contains compensation and date entries appropriate for perm or contract positions.

4. Status choices are set through the Lists → Job Order Lists → Job Order Status Codes command. Initial status entry is set through the Settings → User Options → Job Order Settings command. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning. Status entries can automatically be updated when a placement or termination is made by selecting what the new Status entry will be with the Settings → User Options → Placement & Terminate Settings command. This command has different Status entries for perm placements, contract placements and terminations.
5. Type choices are set through the Lists → Job Order Lists → Job Order Type Codes command. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning. Type entries can automatically be updated when a placement or termination is made by selecting what the new Type entry will be with the Settings → User Options → Placement & Terminate Settings command. This command has different Type entries for perm placements, contract placements and terminations.
6. Class choices are set through the Lists → Job Order Lists → Job Order Class Codes command. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning. Class entries can automatically be updated when a placement or termination is made by selecting what the new Class entry will be with the Settings → User Options → Placement & Terminate Settings command. This command has different Class entries for perm placements, contract placements and terminations.
7. The Closed date is entered when the status of the job order changes to what is used for closed job orders as defined by the Settings → User Options → Placement & Terminate Settings command. This command has different status entries for perm placements and contract placements.
8. Dates in WinSearch do not have their format set through WinSearch. Instead, the format is selected outside of WinSearch through Control Panel and Settings options.
9. Staff Rep and Sales Rep lists the users identified with the Settings → User Administration command. Job orders will have entries not in this list if the Staff or Sales Rep for the job order has since been deleted. SYSADM determines how flexible changing staff rep can be. Settings → SYSADM Options → Miscellaneous Options has the Users Can Change Staff Rep Entries. When this item is not checked, the average user cannot change the staff rep entry for a person UNLESS it is their own name changing it to someone else. Now, if the Users Can Change Staff Rep Entries check box is empty, if a user has a Supervisory status, they are allowed to change staff reps. Supervisory status can be handy for administrative and managerial roles. The Supervisory status is added and removed by SYSADM with the Settings → User Administration command.
10. User defined fields are adjusted with the Settings → SYSADM Options → User Defined Field Setup command. There, the dialog box is available for creating, adjusting and deleting UDFs that you may have. However, for LOV UDF entries,

those are made with the Lists command then choosing Persons List, Company List or Job Order List before choosing User Defined Fields and the UDF LOV list that you want to tweak. The WinSearch User Defined Field Setup dialog box is also available when you can also right-click a person's UDF field entry box and choose UDF Setup Options. When logged in as SYSADM, you can make changes. When not SYSADM, you cannot.

11. Allowed to enter Titles not in the list? That is Settings → SYSADM Options → LOV Control Options. The titles themselves are found in Lists → Persons Lists → Job/Position Titles.
12. Name and HR Name show the Employees at the company identified by the Company entry. SYSADM can prevent users from typing a name not on that list with the Settings → SYSADM Options → LOV Control Options command and making Employees/Contacts LOV red. Settings → SYSADM Options → Miscellaneous has a Job Orders Requires a Contact check box that when selected, requires a Contact category person from the database to be selected for one of the two Name entries before the job order can be saved.
13. Degree entries are adjusted when the Standardize Educational Degree Abbreviations check box is selected with the Settings → User Options → Persons Settings command.
14. Degree Levels choices are set through the Lists → Persons Lists → Degree Search Levels command.
15. Major choices are set through the Lists → Persons Lists → Degree Majors command. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.
16. Settings → User Options → Job Order Settings has the Auto Date Stamp Entries in Notes for whether editing Notes automatically puts the date, time and user.
17. Web Status entries cannot be altered but SYSADM does set which users can make adjustments to which job orders are posted to web sites and when using the Settings → SYSADM Options → WSJ Internet Distribution Setup command.
18. Key words for companies have the same customization settings that you have for key words for people.
19. Company Name in both cases comes initially from the main Job Order window. SYSADM sets whether a company from the database is required on the main form with the Settings → SYSADM Options → Miscellaneous command and the Job Orders Requires a Company check box. Whether you can even type a company that does not exist in the database is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.
20. Names and Addresses set how WinSearch capitalizes the address when typed in lowercase.
21. States lists are found in Lists → General Lists → State& Provinces

22. Country lists are found in Lists → General Lists → Countries & Country Codes. Thus, if you use the country area for Counties instead, you can remove the companies and add the most frequently used counties. Granted, you can use ZIP code distance searches in lieu of tracking candidates by county.
23. Fee Terms initially comes from the main company linked to the job order and that company's entry initially comes from the user's Settings → User Options → Company Settings command. Having no entry here means that the Fee Terms line does not appear on certain reports.
24. Pay Terms initially comes from the main company linked to the job order and that company's entry initially comes from the user's Settings → User Options → Company Settings command. Having no entry here means that the Pay Terms line does not appear on certain reports.
25. Fee Split has the initial entry set by the user's Settings → User Options → Job Order Settings command. Having no entry here means that the Fee Split line hides on certain reports.
26. Terms has the initial entry set by the user's entries for the Settings → User Options → Job Order Settings command. Having no entry here means that the Terms line hides on certain reports.

27. Split With choices are set through the Lists → Persons Lists → Persons Referral Sources Codes command. This is one of the settings that SYSADM controls the behavior with the Settings → SYSADM Options → LOV Control Options command described at the beginning.

File Edit View

Main Co:

Division:

Region:

*Job Title: Applications Developer (11)

*Degree Required: B. S. / B.A. (13)

*Deg Level: (14)

*Major Required: (15)

Travel %: 0% (28)

	Salary	Bonus	Commission
Target:	\$0	\$0	\$0
Minimum:	\$60,000	\$5,000	\$0
Maximum:	\$80,000	\$5,000	\$0
Total Comp:	\$85,000	Relocate \$'s: \$0.00	

Max Bill: \$0.00 Start Date: (8)

Target Bill: \$0.00 Start ASAP

Min Bill: \$0.00 End Date: (8)

OT Rate: \$0.00

OT After: 0 Billing Unit: Hours

Notes
It isn't the same position but close enough.
One exception: Need French fluency.

Position Description
Oddball thing - French requirement
Mobile Developer

Minimum Requirements
Android app developer w/French

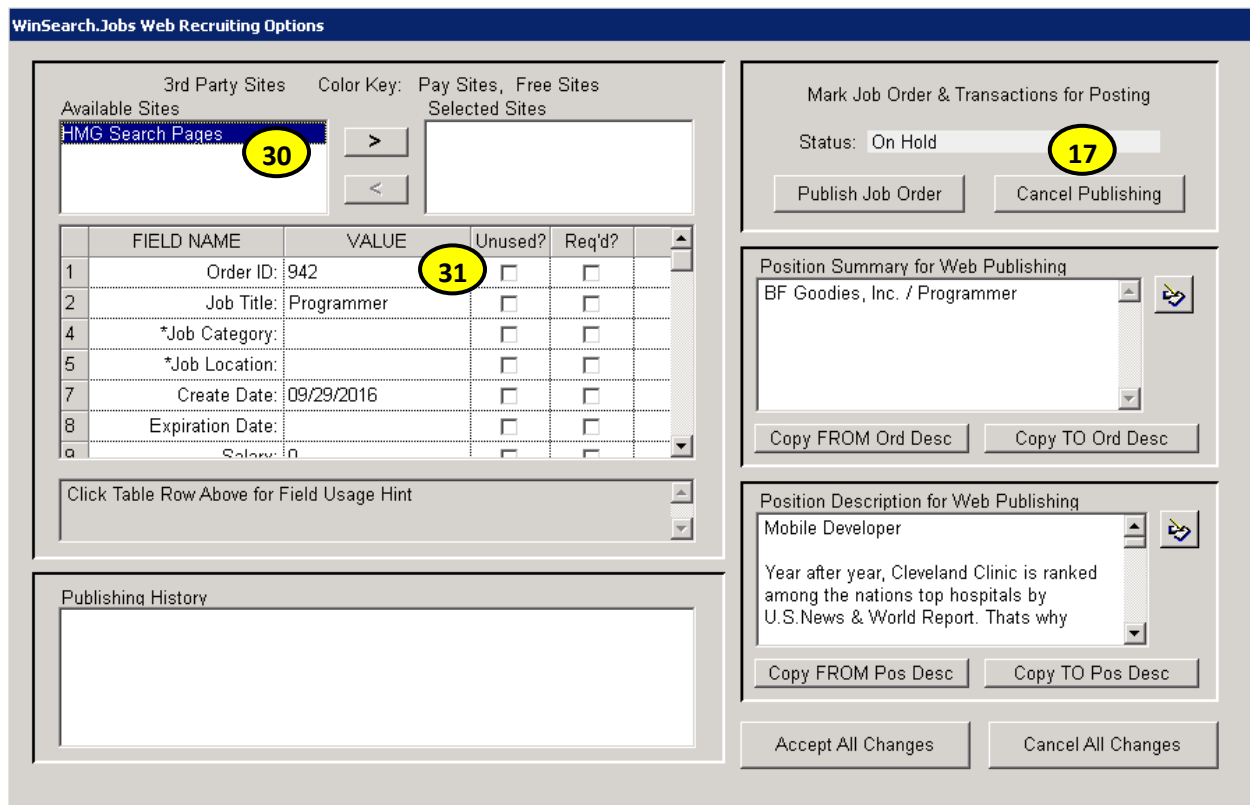
Standard Benefits
80/20 coverage with \$200 deduc (29)

Special Perks
To Be Determined (29)

Relocation Policy (29)

NUM

28. Will Travel have their initial entries set through the user's Settings → User Options → Persons Settings command.
29. Standard Benefits, Special Perks and Relocation Policy come from the job order's company's entries with the same names. The company initially has the entries provided with the Settings → User Options → Company Settings command.



30. Available Sites are set per user with the Settings → SYSADM Options → WSJ Internet Distribution Setup command.
31. Choices for a particular Available Site are set by the site's requirements and not customized in WinSearch.

Search

These settings affect searches that you create in WinSearch.

- Set the cutoff point for the maximum number of people that a search returns with the Settings → SYSADM Options → Miscellaneous Options command then enter the cutoff number in the Maximum Records In a Search List box.
- Set whether the listed criteria items to do searches on includes slower non-indexed entries. Select the Settings → SYSADM Options → Miscellaneous Options command then select the Persons, Companies, and/or Job Orders check boxes under Use Indexed Fields ONLY When Searching For. Having the check box selected has fewer search criteria listed but that way, you can focus on the criteria type that you actually use.

Activities

Let's look at the Activities Form and WinSearch settings that influence these entries.

The screenshot shows the 'Activity Records - Enter New Record' form. The fields and controls are numbered as follows:

- 1: Act Code: Phone Call
- 2: Subject text area
- 3: Starting Time: 4:35 PM
- 4: *Resp: SYSADM
- 5: Duration: 15
- 6: On Calendar checkbox
- 7: Private checkbox
- 8: Set Alarm checkbox
- 9: Priority: 0
- 10: Cost \$: \$10.00

Additional fields and controls include:

- Primary Link: Smith, *Keith
- 36842 (ID)
- Sched Date: 9/7/2017
- *Status: (empty)
- Lead Time: (empty)
- *Units: (empty)
- Due Date, Due Time, Attempts (empty)
- Created: SYSADM, 9/7/2017
- Updated, Completed (empty)
- Linked Staff Reps: GABBY, GLAWRENCE, SYSADM (Incl)
- Option to save as individual/multiple activities is not available for this combination of links
- Buttons: Save & Follow-Up, Save & Close, Save, Recurring..., Cancel/Close
- NUM (Number) field

1. The initial activity code is set by the Settings → User Options → Calendar Options command and the Default Code for New Activities box. SYSADM sets which activities are available by creating the activity code with the Settings → SYSADM Options → Activity Code Setup command and selecting the User Selectable check box.
2. Notes will have a date/time/user stamp when opened in the popup menu when the Auto Date Stamp Entries in Activity Notes check box is selected after using the Settings → User Options → General Settings command.
3. Initial activity duration set with the Settings → User Options → Calendar Settings command means that when you put a start or end time, WinSearch puts in the default duration and the missing start or end time.

4. Resp is the Staff Rep for the activity. It behaves just like Staff Rep for people.
5. Status is initially set by the Default Status entry of the activity chosen by Act Code. SYSADM sets the default status for each activity code using the Settings → SYSADM Options → Activity Code Setup command. Choices for status are set with the Lists → General Lists → Activity Status Codes command.
6. The On Calendar check box gets automatically selected for specific types of activities. These activities are the ones with the activity code whose configuration in the Settings → SYSADM Options → Activity Code Setup command includes the Always Place This Activity on Calendars check box.
7. Whether users can create private appointments is set by the Allow Private Activities for Users check box in the Settings → SYSADM Options → Activity Control Options check box.
8. Settings for the initial settings for how much lead-time an alarm starts with is chosen with the Settings → User Options → Calendar Options command. Default Lead Time for Alarms and Default Alarm Lead Time Units are the boxes that set the initial Lead Time and Units when the Set Alarm check box is selected.
9. Priority's initial entry is set with the Settings → User Options → Calendar Options command and the Default Priority Box.
10. SYSADM sets for each activity code the default cost amount and cost category with the Settings → SYSADM Options → Activity Code Setup command. The choices for the Cost Category are done with the Settings → SYSADM Options → Activity Cost Categories command.
11. The list of companies, employees, job orders or persons has their LOV drop-down turned on with the Settings → Display Options → LOV Drop Down options command.
12. Linked Staff Reps will automatically select specific users for alarms and inclusion based on the activity code configuration. SYSADM does this setup with the Settings → SYSADM Options → Activity Code Setup and choosing users to include and/or notify for the specific activity code.

Other Settings Not Tied to People, Companies, Job Orders, Searches or Activities

- All currency and non-currency numbers can have their formatting set through Windows. You can set currency and number formatting separately through the Settings → SYSADM Options → General Settings command but it is easier to do it through the Control Panel.
- The frequency that WinSearch checks for alarms is set in the Timer Settings section of the Settings → SYSADM Options → General Settings command. Putting 0 for the main timer will shut down all timer functionality.
- WinSearch's automatic close can have the times for it set as well as having that feature turned off with the Inactivity Auto Close Settings command. When you choose the Settings → SYSADM Options → General Settings command, you can put the time of the day when WinSearch switches from using the Timeout During Work Hours and the Timeout After Work Hours. Putting 0 in either of these means that there is no automatic closing.

- When you close WinSearch, you can have it also disconnect all database connections. Under the Settings → SYSADM Options → General Settings command, the Logout of Database on Close check box has the WS icon on the system tray close the database connection.