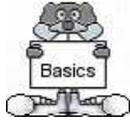# Gopher Quick Starts

Gopher Basics

In the following examples of adding, deleting, finding and changing records we will be using the Profile tab. The other tabs, except the Planner, work the same way. However, a Profile record of a person must always be added before adding their name to the other tabs.

Adding a Record

Everyone using Gopher should have a Profile record. The following steps will walk you through adding a profile for yourself.
1) Click the **Profile** tab.
2) Click the **Add** button.
3) Enter your name, company name, phone numbers, email, etc. When you get to the Profile Type Code box (A/C), select 'C' for Client.
Note: Your first, middle and last name must be typed here exactly as they were entered on the 'User' tab in Gopher Options. If you are using the trial version of Gopher and have not created a user record in Gopher Options, you may ignore this note.

4) Click the **Do It** button, to process the Add.

Finding a Record

1) If you are no longer on the Profile tab, click the **Profile** tab.
2) Click the **Find** button.
3) Enter the search criteria in the appropriate field(s). For example, if you would like to search by your last name, tab to Last Name and type your last name.
Note: You may type just the first letter of your last name followed by an asterisk (*) to complete the search.

4) Click the **Do It** button, to process the query. The record's contents will appear.

Changing a Record

1) Find the record you wish to change, if it is not already selected.
2) Click the **Change** button.
3) Tab to or click on the field(s) to change.
4) Make the needed changes.

5) Click the **Do It** button, to process the Change. The status box on the bottom center of the Gopher screen will display the message 'Change to Profile table successful'.

Deleting a Record

1) Find the record you wish to delete, if it is not already selected.
2) Click the **Delete** button. The information pertaining to the record will turn red to alert you of a record about to be deleted.

3) Click the **Do It** button, to process the Delete.
Note: If you are deleting a Profile record, a dialog box will appear to inform you that related calendar, notes, resume, memo, position and tracking records for this person will also be deleted. You may decide to require a password to delete a Profile record. The password is set in Gopher Options.

Stopping a Command

Clicking the Add, Delete, Change or Find button starts one of these processes. The process does not complete until the Do It button is clicked. The process may be stopped if the depressed button is clicked before the Do It button is clicked.

Short Cuts for Adding Records

When adding a new profile it is always easiest to query for the company name and see if you already have a similar profile.

If you do, adding a new record is a snap. Simply click the **Copy Add** button, [icon], while on the Profile of the record you wish to copy. The record will be copied except for the name. Enter the new name and change any information that may be different. Don't forget to click the **Do It** button, [icon], when you are ready to save the Add.

Once you have entered a profile record for a person adding records to other tabs for this person is made easier with the '**RIGHT CLICK**' feature. In fact, if you are going to add records to any tab it is always best to first **FIND** the record on the Profile tab. This insures that the record is there and will avoid mistakes in the spelling of the name, which also causes lost time. When the name you want is on the Profile tab **RIGHT CLICK** to the tab you want to add a record for and click the **Add** button. Gopher will automatically enter the name. You should then enter the other information pertaining to the new record, clicking the **Do It** button when you are ready to process the Add.

All of the information in the Gopher database is available by RIGHT or LEFT clicking one of the six Gopher tabs.

LEFT clicking a tab will display the information on the tab clicked for List 1. If a Find has not previously been performed on this tab, no records will be displayed until a Find is performed.

RIGHT clicking a tab will display all records in the tab clicked related to the person's name that was on the previous tab. Right clicked tabs display information on List 2.

Refer to pages 12-13 of these Quick Starts for more information on RIGHT and LEFT clicks and book marking lists.

Planner — The Planner tab is a complete day timer. When you open Gopher, your activities that have been scheduled for the day will be the first items you see. The Planner is described in more detail in the section called 'The Gopher Planner'.

Profile — The Profile tab contains the basic contact and keyword information on both Applicants and Clients. A record must exist for an applicant or client on the Profile tab before records with this person's name can be added to the other tabs. Applicants are coded 'A' and clients are coded 'C' in the A/C box on the Profile tab. Duplicate names of the same type are not allowed in Gopher; however, one person might be in your Gopher as both an Applicant and Client. If you do have two people with the same name, a unique middle initial must be added to one of the individual's profile record in order for you to distinguish between the two. For example, if John Brown has a profile record of type 'A' for applicant another John Brown applicant cannot be added unless a unique middle initial is entered (i.e. John 1 Brown). However, there could be a John Brown applicant and a John Brown client but keep in mind they should be one and the same person as they will share the same note pad..

Resume — The Resume tab contains an applicant's resume. If you perform a find for an applicant on the Profile tab and then RIGHT click to the Resume tab you will instantly see any available resume information. Resumes may be imported into Gopher in three different ways: 1) using iRex for resume retrieval, 2) importing a text file, and 3) copying the resume information and pasting it to the Resume record in Gopher. The first two methods will create the Profile record for you, perform a keyword search and save keyword matches to the applicant's profile, perform a comparison between the found keywords and required skills on open positions and save matches to the applicant's target list, and link the original resume to the Gopher resume record.

Memo — The Memo tab contains the text of letters and emails. The body text can be typed directly into the 'Memo Body' field or be edited or entered with MS Word. Letters printed or faxed from this tab can use either pre-printed letterhead or letterhead can be produced by Gopher as the letter is printed. Template letters can be stored and copied to specific letters.

Position — The Position tab contains information on job orders, requisitions or projects. If you perform a Find for a client on the Profile tab, a right click to the Position tab will show any positions related to this person. Positions must be associated with a person and company before they can be added.

Tracking — The Tracking tab contains the tracking information for resumes, interviews and placements and new hires. A tracking record is automatically added when a resume is emailed or printed from Gopher. The Tracking tab can show the interview history of any applicant or client and display outstanding interviews and start dates.

The Gopher Note Pad

The Gopher Note Pad is unique. The note pad is located at the bottom of the Gopher screen and is always present on all tabs.

- The notes for any name selected on any tab automatically show in the note area.
- The speed at which you can add and change notes give Gopher users an advantage over other recruiting software.
- The same buttons used to Add, Change and Find other records are used for the note pad. The only difference is that the buttons are clicked with the RIGHT mouse button instead of the left. **Note:** We do not allow for deleting of notes or changing ownership for security purposes. The integrity of your data would be compromised if applicant and client notes were mistakenly or purposely deleted or if the ownership was changed.

Adding a Note
1) Find the person you wish to add a note to.
2) RIGHT click the Add button. The note pad will open and the owner (your ID) and date will automatically be entered.
3) A box will open to type your note.
4) Click the Save button to process the Add or Cancel to cancel the Add.

Changing a Note
1) Find the person whose notes you want to change.
2) Select the row on the note pad containing the note you wish to change.
3) RIGHT click the Change button.
4) A box will open to make the needed changes.
5) Click the Save button to process the Change.

Finding a Note
1) RIGHT click the Find button while on any tab. The note pad will become blank and additional rows will be visible in order to find notes by a person's name.
2) Enter the information for finding a record as you would for any Find command.
3) Left click the Do It button.
4) All the notes that match your find will appear in the grid and the grid may be scrolled. **Note:** The notes listed on the grid no longer apply to the tab record above and the fields are blank. If you desire information from a tab for any particular note, click on the name on the note and drag and drop it on any of the tabs.

The Gopher Planner

The Gopher Planner is a complete day timer. When you start Gopher all the activities for the current day are displayed. You can move to any row on the grid and the notes for that person are automatically shown on the note pad below. You can move to any row on the grid by clicking the leftmost tan button. After a row is selected, you can drag and drop or right click any of the other tabs and the information for that person is displayed. With a click of a check box you can:

- See all actions that remain open for today and past days and their age.
- See all actions for any particular day.
- See a 'birds eye' view of your planner by viewing the action count for each day displayed on the calendar.
- Sort your actions by type for any day.

Adding Planner Actions

- ❖ Right clicking the Planner tab from any other tab will automatically select the planner tab and put it into the Add state with the name of the person already entered. Clicking the Do It button will add the action and move you back to the original tab.
- ❖ Bookmark names for batch adds to the calendar. From any tab you can drag and drop the first or last name to the Planner

  button, , on the tool bar. The names will be saved as bookmarks.
- ❖ Click the Planner tab after book marking and then click the Add button. Tab to the first or last name on the grid and a drop down list will be presented for selecting the names bookmarked.
- ❖ The Add Selections to Planner option from any list view will also add all the selected names as planner entries.

 u can manage or share information with other recruiters by adding actions to their nners. When in the Add state, click the button in the 'For' column and select the sired recruiter ID and click Do It. View another recruiter's planner by clicking Planner the Gopher menu bar, View Planner of, and selecting the user ID of the recruiter.

Planner Management

The Gopher Planner has powerful features to help manage your time for effective recruiting.

 Checking this box located below the grid will show the number of actions by day in the lower right corner of each calendar day. With this view you can quickly adjust days with too much or too little activity.

For days with too many actions:
1) Click the check box 'For this date only'.
2) Click the date with too many actions.
3) Select an action row you want to change by clicking the button at the far left on the selected row.
4) Click the Change button.
5) Click a new calendar day for the selected action.
6) Click the Do It button.

For actions that are getting too old:

The third column of the grid captioned with 'S' for Status shows a number for each action row. Zeroes mean that the action is for today. Numbers other than zero depict how long, in days, this action has gone without being accomplished. Move to a new day or delete actions that are getting too old.

Power Calling

After you have mastered the techniques of adding, power adding and planner management you are ready for power calling.
1) Click the Planner tab if you are on another tab.
2) Click the 'Desc' caption of the grid to sort actions by type and group all your calls together.
3) Select the first call by clicking the button on the left of the desired row.
4) Review the notes that show automatically for the selected name on the Note Pad below the calendar.
5) If the Constant Phone View is not checked under Options, check it to view the phone numbers at the bottom.
6) Make the call.
7) With the RIGHT mouse button click the Add button and type a note highlighting the conversation.
8) Click the Do It button to save the note.
9) Click the Trash and Do It buttons to delete the action from the calendar.

Note: We recommend deleting planner events when completed as opposed to changing the status to Closed primarily for the reason that it is much more efficient to have the note pad act as the historical document. The note pad is persistent throughout Gopher, meaning that no matter what tab you are on you can view the complete history of every conversation and meeting with someone by reviewing that person's note pad. The Planner would also become very cluttered with 'old' data if the status were simply marked Closed.

Tool Bar Features

The Gopher tool bar is the row of buttons just above the six tabs on the Gopher screen. The first page of the 'Gopher Quick Starts' describes the usage of the first five buttons for Adding, Trashing, Changing and Finding records. The next thirteen buttons are explained in the pages that follow.

Note: Tool bar buttons become available to use depending on the selected tab and record state. If the button is not available it is grayed out and nothing happens when it is clicked. All tool bar buttons will be unavailable when the Add, Trash, Change or Find buttons are clicked down.

Planner Quick Check

The Planner button can be clicked from any tab and will automatically take you to and refresh the Planner tab. This feature is handy in a multi-user system where there is a constant exchange of planner entries among users and checking your planner often is advisable.

This button also acts as a reset button. If your Gopher seems a bit 'off' (i.e. perhaps a command button was clicked and the action was never completed or canceled) you may click this Planner Quick Check button in order to reset Gopher.

Query Viewer

The Query Viewer button opens the Query Window to view the code for most recently run Query, View Saved Queries, Save or Delete Queries.

Printing

The Print button is used to print cover sheets, resumes and letters. Note: Before the print button can be used Word must have been selected for this user in 'Gopher Options'.

Printing Fax Cover Sheets
1) Click the Profile tab and Find the person you want to print a fax cover sheet for.
2) Click the Print button and fill in the comments area, if desired on the print form that appears in the middle of your screen.
3) Click the OK button.

Printing Resumes
1) Click the Profile tab and Find the person to whom the print will be sent.
2) Click to the Resume tab and Find the resume you wish to print.
3) Click the Print button and respond to the print form dialog.
   Note: The resume must contain Gopher formatting markers before it can be printed. Refer to Gopher Help or the Gopher User Guide for information on format markers.

Printing Letters
1) Click the Memo tab and Find or Add the letter you wish to print.
2) Click the Print button and respond to the print form dialog.

Importing Resumes

Information from a resume can be imported to create Profile and Resume records for applicants. One method of importing utilizes the Gopher Parser, a resume breaking software application which is integrated with Gopher. To import a resume using the parser, open the resume in Word and click the 'Save to Parser' button. This button simply saves the resume in your c:\Program Files\go4\Resumes folder. If you do not see the button, save the resume in your c:\Program Files\go4\Resumes folder by opening the resume in Word, and clicking File, Save As or by copying and pasting the file directly into the folder through 'My Computer' or 'Windows Explorer'. You can save multiple resumes in the c:\Program Files\go4\Resumes folder and import them at once into Gopher. We would recommend that you work in batches of 25 or 50 at the most. Once the resumes have been saved to the

c:\Program Files\go4\Resumes folder, click the ⬤ button in Gopher. Once this button is clicked, it will take the parser approximately 2-3 seconds per resume for extraction. Once the parser has completed parsing the resumes in the go4\Resumes folder, you will see a box in the status bar on the bottom of Gopher that states 'Click to Load x Resumes'. Click the box, and follow the steps to import.

When importing resumes into Gopher, the following will occur:
1) A Profile and Resume record will be added with the information extracted from the resume.
2) The resume will be compared with your keyword table and any keyword matches will be saved to the Skills box on the Profile tab.
3) The keywords that were found will be compared with the Required Skills on open positions, and any matches will be saved to the applicant's target list. There must be a 100% match in order for the positions to be saved to the target list.
4) The work experience will be saved to the applicant's snap shot. This provides you with the opportunity to view the work experience without needing to scroll through the entire resume.
5) The original resume will be saved in a folder specified in Gopher Options (i.e. if on a network, your shared drive), and a link will be made from the resume on the Resume tab in Gopher to the original resume.

Duplicates

If the name on the resume already has a Profile record, you will be notified of this fact during the import process, as long as you choose to view each resume as it's being imported (as opposed to choosing the 'batch import' option). You will be given three options for duplicates: 1) attach the resume to the existing profile, plus refresh any missing information from the existing profile and refresh the keywords; 2) attach the resume to the existing profile and only refresh the keywords; 3) create a new profile record for the applicant. If the 3rd option is selected, the new profile will contain a unique number as the middle initial, as duplicate names are not allowed in Gopher.

Note: Gopher will **not** replace information on the Profile, it will only update information that is missing. Also, if the applicant already has a resume record in Gopher, a 2nd resume record will be added. You can easily determine which is the most recent by the date on the Resume tab.

Gopher Import Options

Gopher offers numerous ways to import a resume using the parser. The one method using the Import button is outlined above. For information pertaining to the other methods, refer to Gopher Help. To access Gopher Help, in Gopher click Help and Gopher Help. For instructions on importing resumes, click the 'Resume tab' chapter on the left portion of the Help screen and click 'Importing Resumes using the parser.

Editing Memos, Resumes and Positions

When the Resume, Memo or Position tabs are selected, the resume, memo or position 'body' fields may be edited in MS Word. In MS Word, spell checking formatting tools are available to speed up the editing process.
1) Select the Resume, Memo or Position tab and Find or Add a record for the desired person.
2) Click the W button as shown above.
3) Edit the text in MS Word using Word and Gopher tools provided on the Word menu bar.
4) Exit MS Word.
5) Click the depressed W button in Gopher to save the edited text to the Gopher record.

Gopher Reports

Gopher reports are available by clicking the Report button when a tab is selected and a Find has been successfully performed. A successful Find is indicated when the 'Total Records' on the bottom of the Gopher screen shows a number greater than 0. After the report is displayed it may be printed by clicking the printer button on the print preview screen.

Note: To print a screen shot of one record only, find the record on the applicable tab that you wish to take a screen shot of. Then, click the Report button and click the printer button on the print preview screen.

Accessing the Web

The Web button provides access to the web page entered in the 'Web Site' box on the Profile tab. If the box is empty the Gopher home page will be opened.

Re-Parsing Resumes for Keywords

The Load button is enabled only when the Resume tab is the current tab and the 'Total Records' on the bottom of the Gopher screen shows a number greater than 0. Clicking this button will parse all the resumes in the list for keywords per the keyword dictionary established in Gopher Options. Keywords found on the resume that are not in the skills box on the applicant's profile are added. This button is used to refresh the loaded Profile when the resume or the keyword dictionary has changed since the resume was imported.
1) Find the resume(s) to re-parse.
2) While on record 1, click the Load button. When Gopher has completed the process you will be notified of the number of new keywords added to the applicants profiles.

MS Access

When LEFT clicked, clicking the Access button will open MS Access with the results from the Find on the current tab. If the Access button is RIGHT clicked, the current notes are exported and displayed in the MS Access grid.

MS Excel

When LEFT clicked, the Excel button will open MS Excel with the current query from the current tab. If the Excel button is RIGHT clicked, the current notes are exported and displayed in the MS Excel spread sheet.

Find List

When records are selected on any of the six tabs with a Find the names can be displayed in a 'Find List' by clicking this List button. A RIGHT click will display names from the current records in the Note Pad.

The 'Find List' enables you to view the results of a Find in list format. To synch the list with the current tab, click Tab Synch and click Yes. As you click in the leftmost gray box on any row in the list, the person's name on that row will appear on the selected tab.

Saving a 'Find List'

The 'Find List' may be saved as a Hot List by naming it in the 'Group1' and 'HotList1' boxes. 'Group1' is the main group name and 'HotList1' is the hot list name. For example, if a find is performed for applicants with JAVA experience, the group name might be 'Applicants' and the hot list name 'JAVA Experience'. Multiple hot lists may be saved under one group. To view the existing Groups, double click in the Group1 box. You may select an existing group, or replace Group1 with a new description. Then, replace 'HotList1' with a new description defining this list.

When you are ready to save the list and close it, click File on the list's menu bar, and make sure Save is checked. The saved hot lists may be opened at any time by clicking Hot Lists on the Gopher menu bar, selecting the group and selecting the hot list. Every time a hot list is opened from the Gopher menu bar, a new Find is performed and the most recent names matching the criteria used in the initial search will display.

Find List Features

+ **Adding Planner Actions**
To add multiple entries to your calendar, generate a 'Find List' on any of the tabs. Select the names on the 'Find List' to add to your planner then click on Add from the list toolbar and choose Add Selections to Planner. This adds planner entries for all the selected names.

+ **Adding Applicants to Target List**
When the 'Position' tab is selected and a 'Find List' of applicants is open, the ID of selected names can be clicked and dragged to the 'Gopher #' field on the Position and dropped. This will add all selected names to the 'Target List' of the selected position displayed on the tab. Applicants can also be added by going to Add in the find list toolbar and choosing 'Add selections to a position target list' and then arrowing to the right to choose which position to add them to. (Positions that are currently on List 1 or List 2 of the Position tab will be displayed)

Finding Name on Tab
This icon is produced when a name is dragged with the left mouse from a 'Find List' to any tab, with the exception of the Calendar tab. When the icon is dropped on the tab, Gopher performs a find for that name on the tab dropped and displays all records found.

Example: If you have a 'Find List' open of applicants and you would like to view one of the applicant's resumes on the Resume tab, LEFT click on the applicant's name on the 'Find List', drag the icon to the Resume tab and drop it. If any resumes are found with the applicant's name, they will be displayed.

Emailing Resumes from Find List to Client for Open Position
To email the resumes of multiple applicants to a position, follow these steps:
1) generate a 'Find List' of the applicants,
2) click the Position tab and Find the position you wish to submit the resumes to,
3) select the names on the 'Find List' that you want to submit to the Position,
4) click Outlook on the Find List menu bar, and click Resumes then arrow to the right to choose which position to email the resumes to. Positions currently displayed on list 1 and list 2 of the position tab will be displayed.

The process of emailing the selected applicants' resumes to the position will then be started. A Tracking record will also be started for the applicant and a note will be added to both the applicant and client's note pads (if the Gopher Notes feature was turned on in Gopher Options).

Emailing a Resume from Find List to Multiple Clients for Open Positions
To email one resume to multiple positions, follow these steps:
1) generate a 'Find List' of the positions,
2) click the Resume tab and Find the resume you wish to submit to the positions,
3) select the client names on the 'Find List' that you want to email the resume to,
4) click Outlook on the Find List menu bar, and click Resumes then arrow to the right to choose which resume to send. Resumes currently displayed on List 1 and List 2 of the Resume Tab will be displayed.

The process of emailing the selected applicant's resume to the clients will then be started. A Tracking record will also be started for the applicant and a note will be added to both the applicant and client's note pads (if the Gopher Notes feature was turned on in Gopher Options).

Sending a Mass Email
To email a memo to a group of individuals, follow these steps:
1) generate a 'Find List of the individuals to email the memo to
2) Bring up the memo you with to email on the memo tab or determine if you will be emailing a memo template
3) select the names on the find list that you want to send the email to
4) click the Outlook button on the Target List toolbar and choose either Email Selections Current Memo and arrow right to view the memos on List 1 and List 2 of the memo tab or choose Email Selections Memo Template and arrow right to choose the appropriate template.

The process of emailing the memo to the selected names will then be started. A note will be added to each of the recipients of the email if the Gopher Notes feature is turned on in Gopher Options.

Note: When emailing from an application outside of Outlook, Outlook will give you a security warning for each person being emailed. You should click OK on this. However, you may choose to download and install a free-application called ClickYes that will automatically click Yes for you. This application can be downloaded from www.contextmagic.com/express-clickyes/. This is not available for Gopher users on the web version.

Hint   *To select all names on a list, click Options on the find list menu bar and click Select All.*

To select multiple names on a list, press the Ctrl key on your keyboard while clicking in the tan box to the left of each name.(the column with the Gopher in the header)

To select a range of names, click in the tan box to the left of the first name in the list to select and press the Shift key on your keyboard while clicking in the tan box to the left of the last name to select.

Note: *It is important that you click in the tan box to the left of the name in order to select that name. It is also recommended that you turn Tab Synch off, in order to speed up the selection of names.*

👀 Snap Shots

No matter where you are in Gopher (with the exception of the Calendar and Note Pad), a pair of eyes will appear when the mouse is positioned over the person's Last Name or the Company Name. When the pair of eyes is visible you may double click in the selected field with the LEFT mouse button in order to view a snap shot of the person or company. The purpose of the snap shot is to give the recruiter a place to record and subsequently view when needed a brief script background or any other information useful when dealing with this person or company or trying to sell this person's or company's services to another. The information contained on the snap shot would not be as handy if put in the Note Pad or the Memo tab.

Person Snap Shot
The top large box area can hold special notes and comments about the individual called Person Talking Points. Certain points may be highlighted by changing the font type or color from the Font Changes option on the Snapshot Toolbar.

Work Experience
For applicants, you will see a Work Experience section. The work experience will automatically be placed there if Gopher Parsing is used to import resumes. Changes or additions may be made by manually clicking in a box and typing the pertinent information.

Show Who Reports to Who
The Show toolbar option will toggle the top large box area between the Person Talking Points and Who Reports to Who. To view other individuals at the selected company, click on Show in the toolbar and choose Who Reports to Who. You will be given name, title, office phone number and reports to for each person listed. To assign a Reports To, click on the supervisor name and then click in the Reports To box for each person who reports to the selected supervisor. To remove a name from the Reports To box, RIGHT click on the Reports To name. **Note:** Names on the employee listing can be dragged and dropped to any of the tab. To remove the listing from the snap shot screen, go back to Show in the toolbar and choose Person Talking Points.

Company Snap Shot
The Who Reports to Who feature on the Company Snapshot functions exactly the same as it does on the Person Snap Shot (described above). The bottom large box can be used to hold the following information:
- Company Talking Points
- Company Summary
- Company Benefits
- Company Directions
- Company Biography
- Company Demographics
- Company Notes

To toggle between these views, go to Show on the Snapshot toolbar and choose which type of data you want to view.

👀 Target Lists

A Target List can be prepared for any candidate or position. It was designed as a method of attaching candidates to searches. The target list contains 15 stages and acts as a checklist so you know where each candidate is in the process with the position. The target list will always remain with the candidate and position, even when the position search process is closed. This enables you to quickly view the positions a certain candidate was contacted about, and vice versa.

When resumes are imported into Gopher using either Gopher Parsing or the Text method, a search is performed on each resume for the keyword synonyms in your keyword table. If matches are found the keywords will be saved to the keywords box on the candidate's profile. Gopher will also compare those keywords with required skills on open positions. Any matches will be saved to the candidate's target list. There must be a 100% match of the required skills in order for this to occur. The keywords must be skills that exist in your keywords table, which can be set up in Gopher Options on the Keywords tab.

Opening Target Lists
The target list may be opened in the following ways: 1) by candidate by finding the candidate on the Profile tab, positioning the mouse in the 'Record#' box and double clicking when you see the pair of eyes; 2) by position by finding the position on the Position tab, positioning the mouse in the 'Gopher#' box and double clicking when you see the pair of eyes; and 3) by clicking Targets on the Gopher menu bar. When Targets is clicked on the menu bar, you will have the option to view 'Position targets for candidates' and 'Candidate targets for positions'. The names that appear can be dragged to any of the tabs with the RIGHT mouse button.

Target List Stages

The 15 target list stages may be user defined on the Captions tab in Gopher Options. The stages that cannot be redefined, are Stage 6 'Resume Sent', Stage 8 'Client Interview' and Stage 12 'Start Date'. The target list is integrated with the tracking tab in Gopher. When a resume is emailed from Gopher or a tracking record manually started, the applicant will automatically be added to the position's target list if not already there, and the 'Resume Sent' stage will automatically be checked. When an interview is scheduled on the tracking tab, the 'Client Interview' stage will automatically be checked and when a placement is made on the tracking tab (by adding a start date), the 'Start Date' stage will automatically be checked.

Adding to a Target List

Records can be added to the target list in multiple ways:

1) Positions are automatically added to a candidate's target list when resumes are imported and a 100% match occurs between the required skills on open positions and keywords found on the resume.
2) Create a 'Find List' with candidates you wish to attach to a position's target list. While the list is open click to the Position tab and find the position you wish to attach the candidates to. Select the names on the list and LEFT click the ID number on any of the selected names. Drag the plus icon that appears and drop it on the 'Gopher#' of the position. You could also create a 'Find List' of positions you wish to attach to a candidate's target list. Drag and drop the ID number of the selected names on the 'Record#' of the candidate's profile.
3) Open a position's target list. Click to the Profile tab and find a candidate to attach to the position. LEFT click in the 'Record#' box and drag the plus icon that appears and drop it into the target list. You could also open a candidate's target list and add a position to it by LEFT clicking on the position's 'Gopher#' and drag and drop it into the target list.
4) Create a 'Find List' with candidates you with to attacht to a position's target list. Select the names on the list that you want to add. In the Find List toolbar, click on Add then 'Add Positions to Selected Target List'. Arrow to the right to see the positions you can add to. Positions shown on List 1 and List 2 of the Position Tab will be available to choose from. If the position you want is not listed, bring it up on the Positions tab and then repeat the process.

Note: If a name is dragged into the target list to be added and that name is already found on the list, it will not be added again.

Deleting from a Target List

Records can be deleted from a target list by clicking in the Record selector column (the leftmost gray box) on the desired row in order to select it and clicking the Delete key on your keyboard.

Joining the Target List to Current Tab

The target list can be joined to the current tab by clicking Tab Sync on the Gopher menu bar and clicking Yes. As you click in the Record Selector column for a particular name or position the information pertaining to the record will appear on the selected tab.

Printing the Target List

Clicking the Print icon on the 'Target List' will produce a report providing you with a description of the target, responsible manager and all the candidates grouped by stages.

Emailing Resumes from Find List to Client for Open Position

To email the resumes of multiple applicants to the position, follow these steps:

5) open the target list for the position
6) select the names on the target list that you want to submit to the Position,
7) click Outlook on the Target List menu bar, and click Resumes and arrow right to choose the position.

The process of emailing the selected applicants' resumes to the position will then be started. A Tracking record will also be started for the applicant and a note will be added to both the applicant and client's note pads (if the Gopher Notes feature was turned on in Gopher Options). The stage 'Resume Sent' will also be updated.

Emailing a Memo from Target List

To email a memo from the target list, follow these steps:

1) open the target list
2) Bring up the memo you with to email on the memo tab or determine if you will be emailing a memo template
3) select the names on the target list that you want to send the email to
4) click the Outlook button on the Target List toolbar and choose either Email Selections Current Memo and arrow right to view the memos on List 1 and List 2 of the memo tab or choose Email Selections Memo Template and arrow right to choose the appropriate template.

The process of emailing the selected applicants' will then be started. A note also will be added to the applicant's note pad (if the Gopher Notes feature was turned on in Gopher Options).

Tips and Tricks

Query Operators Following are the various operators that may be used when performing Finds in Gopher.

Wildcard '*'
The asterisk, *, is the most commonly used query operator. *Examples:* 1) typing 310* in Home Phone will find all records with a home phone number in the 310 area code, 2) typing Sm* in Last Name will find all records with the last name starting 'Sm' (i.e. Smith, Smiley, Small), 3) typing *TAX* in the Keywords box will find all records with a keyword of TAX (typing just TAX in the keywords box will show those records with ONLY the word TAX as a keyword), 4) typing *TAX*FINANCIAL* in the Keywords box will find all records with the keyword TAX and the keyword FINANCIAL.

Range Query '[ ]' and ':'
Text Field Example: typing [A-C]* in Last Name will find last names beginning A, B or C.
Number or Date Field Example: typing 25000:50000 in Salary will find salaries from $25,000 thru $50,000 and typing 01/01/02:12/31/02 in Record Date will find profile records added in the year 2002.

Null Value Query '='
If you would like to find all records that have an empty value, use the = operator. *Example:* typing = in Email will find everyone with a blank email address. Only applies to text fields.

Or Query '^'
If you would like to perform an 'or' query, use the ^ operator. *Example:* typing *JAVA^SQL* in Keywords will find everyone with JAVA or SQL experience.

Less Than, Greater Than '< >'
< Less Than
> Greater Than
<= Less Than/Equal To
>= Greater Than/Equal To
<> Not equal to

Whole Word Only '* *'
If you would like to perform a search for a word on the Resume tab and you would like to include in the results only entire words found, use * word * (there is a space before and after the word). For example, you would like to perform a search for all resumes containing 'IS'. If you type *IS*, any time the characters 'is' are found together they will list in the results (i.e. list, district, establish, this, visual, etc.). However, typing * is * will only include in the results those resumes containing the entire word 'is'. This feature is only available on the Resume tab.

Combined Profile and Resume Searches

When the Find button is clicked on the Profile tab, the right keyword box changes to a box titled 'AND resume contains'. This enables you to perform a combined search on both the Profile and Resume tabs. For example, if you would like to find all Harvard MBA's with International Finance experience, you could enter the criteria *INTERNATIONAL*FINANCE* in the Profile keywords box, select MBA from the Education codes on the Profile tab and type *Harvard* in the 'AND resume contains' box. **Note:** You can turn the 'AND resume contains' search to an 'OR resume contains' search by double clicking in the box.

Linking Files

Up to five files may be linked to each Resume record, Memo record and Position record. The files may be images, documents, spreadsheets, html files, etc.

There are two ways to link a file:

1) Click the green plus sign, [+], that is displayed on the Gopher status bar when a record is selected on the Resume, Memo or Position tabs. A dialog box will appear where the file to be linked should be selected. Upon clicking 'Open', the file will be linked, with no further steps necessary.
2) Open Windows Explorer, select from one to five files and drag and drop the file(s) on the link area of the Gopher status bar (where the green plus sign is located).

Once a file is linked, the green plus sign turns into a link button, [link], and a new green plus sign will appear if five files are not already linked. If the mouse is positioned over the link, the path to the file will appear. To open the file, simply click the link.

Drag and Drop

Clicking and holding down the LEFT mouse button on the first or last name field from the calendar, note pad or company list and then dragging and dropping it on any of the tabs will retrieve records for the person on the selected tab.

Note: Names are only visible on the note pad when a Find is performed on the note pad. The company list is visible when the [icon] button is clicked next to the 'Company Name' field.

Tab Navigation using RIGHT and LEFT clicks

As shown in these 'Quick Starts', the Gopher architecture centers around 6 tabs: Calendar, Profile, Resume, Memo, Position and Tracking. Tab navigation is performed by clicking to the tab with either the RIGHT or LEFT mouse button. The results of a LEFT or RIGHT click are different depending on the tab clicked and the tab that was active when the new tab was clicked. Each tab can hold two independent lists from two different Finds. The purpose of using both the RIGHT and LEFT mouse is to increase the speed at which a recruiter can access data because it reduces the number of buttons and screens needed. The use of tabs rather than additional screens also increase the recruiters speed in accessing data because tabs do not require yet another set of tool bars to click and learn. The price paid for LEFT and RIGHT clicks and two separate and independent lists per tab is the learning curve. However, once clicks and lists are mastered it is a far more elegant and powerful tool than the typical cluttered and screen happy competitor recruiting system. Sophisticated tools are more difficult to master but once learned their potential is far greater than simpler tools.

Planner Tab
Right clicking **from** the Planner tab to another tab – Causes a 'Find' on the tab clicked for the person on the selected row of the Planner tab. If a tab other than Profile was clicked, you may add a new record for the selected person by clicking the Add button.
Right clicking **to** the Planner tab from another tab – Causes a 'Find' on the Planner tab for the person that was visible on the prior tab. If records are found for the person they will be displayed and you may click the Add button to add a new Planner entry for the person. If no Planner records were found, the Planner will automatically go into the Add state.

Profile Tab
Right clicking **from** the Profile tab to another tab – Causes a 'Find' on the tab clicked for the person on the Profile tab. You may add a new record for the selected person by clicking the Add button.
Right clicking **to** the Profile tab from another tab – Causes a 'Find' on the Profile tab for the person that was visible on the prior tab.

Resume Tab
Right clicking **from** the Resume tab to the Profile, Memo and Tracking tabs – Causes a 'Find' on the tab clicked for the person on the Resume tab. If a tab other than Profile was clicked, you may add a new record for the selected person by clicking the Add button.
Right clicking **to** the Resume tab from Profile, Memo and Tracking tabs – Causes a 'Find' on the Resume tab for the person that was visible on the prior tab.

Automated Matching from Resume Tab to Position Tab

Right clicking **from** the Resume tab to the Position tab – Causes a matching action of all keywords in this candidate's profile to the required skills on the Position tab. A 100% match of all required skills must occur for a position to be listed on the Position tab.

Right clicking **to** the Resume tab from the Position tab – Causes a matching action of all required skills on the Position tab to words in the resume. A 100% match of all required skills must occur before the candidate is listed on the Resume tab.

Memo Tab

Right clicking **from** the Memo tab to another tab – Causes a 'Find' on the tab clicked for the person on the Memo tab. If a tab other than Profile was clicked, you may add a new record for the selected person by clicking the Add button.

Right clicking **to** the Memo tab from another tab – Causes a 'Find' on the Memo tab for the person that was visible on the prior tab. The Add button may be clicked to add a new memo record for the person.

Position Tab

Right clicking **from** the Position tab to the Profile and Memo tabs – Causes a 'Find' on the tab clicked for the person on the Position tab. If the Memo tab was clicked, you may add a new record for the selected person by clicking the Add button.

Right clicking **from** the Position tab to the Tracking tab – Causes a 'Find' for the 'Gopher#' matching the 'Position#' on the Tracking tab. The results of this click produces all resumes sent for the position listed on the Position tab.

Right clicking **to** the Position tab from the Profile and Memo tabs – Causes a 'Find' on the Position tab for the person that was visible on the prior tab. The Add button may be clicked to add a new position record for the person.

Right clicking **to** the Position tab from the Tracking tab – Causes a 'Find' on the Position tab for the 'Position#' that was visible on the Tracking tab.

Automated Matching from Position Tab to Resume Tab

Right clicking **from** the Position tab to the Resume tab – Causes a matching action of all required skills on the Position tab to words in the resume. A 100% match of all required skills must occur before the candidate is listed on the Resume tab.

Right clicking **to** the Position tab from the Resume tab – Causes a matching action of all keywords in this candidate's profile to the required skills on the Position tab. A 100% match of all required skills must occur for a position to be listed on the Position tab.

Tracking Tab

Right clicking **from** the Tracking tab to the Profile, Memo and Resume tabs – Causes a 'Find' on the tab clicked for the applicant on the Tracking tab. If the Memo tab was clicked, you may add a new record for the selected person by clicking the Add button.

Right clicking **from** the Tracking tab to the Position tab – Causes a 'Find' for the 'Gopher#' matching the 'Position#' on the Tracking tab.

Right clicking **to** the Tracking tab from the Profile, Memo and Resume tabs – Causes a 'Find' on the Tracking tab for the person that was visible on the prior tab. The Add button may be clicked to add a new tracking record for the person.

Right clicking **to** the Tracking tab from the Position tab – Causes a 'Find' on the Tracking tab for the 'Gopher#' that was visible on the Position tab. The results of this click produces all resumes sent for the position listed on the Position tab.

📖 List 1 and List 2

Each tab in Gopher, except the Calendar, is capable of holding two separate lists made from the Find command. Each list is independent of the other and only one at a time can be displayed in the tab. Above each tab, the name that is currently in either List 1 or List 2 will be displayed, similar to the picture below. If there is not a name in a list for a particular tab, three dots will appear instead of a name.
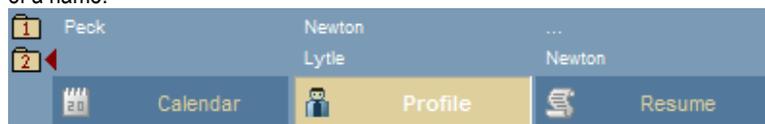
The lists can be toggled from list one to list two by clicking the List 📁1 or List 📁2 folders. The status bar on the bottom of the Gopher screen shows which list you are currently on. The current list is noted by a red arrowhead pointing to the list. In the above example, the current list on the Profile tab is list 2 and we are currently on "Lytle's" record.

A LEFT click to any tab sets the tab to List 1. Whatever was on this tab before in List 1 will be displayed. A RIGHT click to any tab is an ACTION click. A find will automatically be performed for the name on the tab being clicked from and the results of that RIGHT click Find will automatically go to List 2, erasing any information that was previously on List 2 on the tab clicked.

Example: We are on Isaac Newton's Profile record and want to review his resume so we RIGHT click to the Resume tab. A Find is automatically performed on the Resume tab for Isaac Newton's name and if a resume record is found it will be displayed in the List 2 folder. If a record was previously in the List 2 folder on the Resume tab, it will be overwritten with Isaac Newton's resume.

The purpose of the two lists per tab is for book marking, enabling you to navigate the entire Gopher database without erasing information that might have been needed on List 1 for any tab.

Note: A switch from one List 1 to List 2 or List 2 to List 1 can be accomplished on any tab by clicking the applicable folder. You can also open either List 1 or List 2 on any tab by clicking the name associated with the List above the tab or by clicking the button containing the three dots if a name is not present.

Query List Example
We LEFT click the Profile tab in order to perform a Find for our active applicants in the 310 area code that have JAVA experience. We are scrolling through the names, reviewing their records, when Ben Lytle calls. We need to go to Ben's Profile record but we do not

want to lose our current list of applicants that we are working with. We can click the List 2 folder, , and find Ben's record. We can

modify it, add notes, etc. and when we are ready to go back to our list of JAVA applicants, we can simply click the List 1 folder, , or click on the name above the Profile tab that is associated with List 1.

  Record Counts

Gopher offers you the ability to see at any time, how many records a person has on the various tabs. For example, if Isaac Newton is currently on the Profile tab you will see whether or not he has a resume(s), snap shots, memos, tracking records, etc. Not only will you see WHAT he has, but also HOW MANY. The record counts are on the very left side of the Gopher screen and are always visible for the person selected on the current tab.

The icons representing the various record counts are described below:

 Planner entries

 Profiles, this will always be 1 unless the person is in your Gopher as both an Applicant and Client

 Resumes

 Memos

 Positions

 Tracking records

 Company Snap Shot

 Person Snap Shot

 Linked files

 Prior positions held

 Target list entries

When one of the above buttons are clicked, Gopher performs a Find for the applicable records and displays them. For example, if

 is clicked, Gopher will perform a Find for the person's name on the Memo tab and will display the results. The results will always go into List 2. This works the same way as a RIGHT click to any tab.