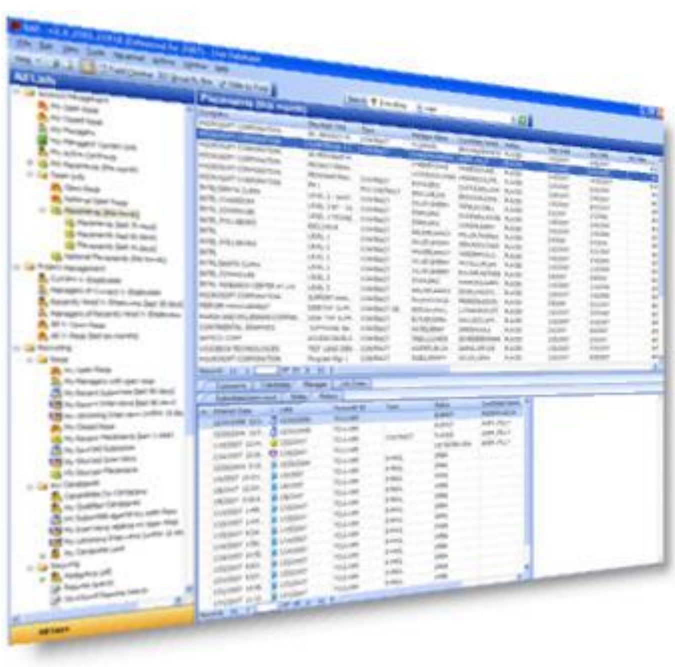
# RAD Users Guide

## Introduction

This is a brief introduction to RAD and how you can use it to get the most out of your daily work. If you have any questions or problems feel free to contact the RAD development team at RAD@excell.com



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# Getting Started

## Installing RAD

It is recommended that you contact IT to install RAD on your computer.
But if you would like to install it yourself you can. Here is how:
You can install RAD from the network at \\edc-data01\software\tools\RAD\RADSetup.msi
*Note: You must be logged in as a local admin on your computer to install*

### Prerequisites

### EZAccess

RAD requires an installation of EZAccess in order to operate
It is recommended that you contact IT to install EZAccess.
You can install EZAccess from the network at \\edc-data01\Software\Applications\Personic EZAccess\Setup.exe

### Office 2003 (optional but recommended)

RAD can interact with Outlook and Excel to log emails or export data but required Office 2003 to operate. If you do not install Office 2003 RAD will still function but without the integrative capabilities.
It is recommended that you contact IT to install Office 2003
You can install Office 2003 from the network at \\edc-data01\Software\Applications\Microsoft\Microsoft Office\Office 2003\SETUPSTD.EXE

## Connecting to RAD

You can connect to RAD 3 different ways. 2 of which are recommended. One is not.

### Local Network (highly recommended)

If you are on the local network and your machine is joined to the Excell (edc) domain you will have access to RAD and all its resources.
RAD runs fastest when connecting from the local network.

### Remotely through VPN (not recommended)

If you are remote you can access RAD through a VPN. Contact IT for directions on establishing a VPN with Excell's network.

The requirements are that your laptop or desktop be joined to the Excell (edc) domain and that you login to your laptop with your Excell login.
If you are VPNed into Excell's network and you meet these requirements then RAD will run for you.
*This method of connecting to RAD is not recommended because RAD will run very slow. This is because RAD wasn't designed to operate over a remote connection. It is recommended to connect over Remote Desktop instead.*

### Remotely through Remote Desktop (recommended)

To connect to RAD over Remote Desktop requires that you first establish a VPN connection with Excell's network. (See "Remotely through VPN" above for details)
However unlike connecting over VPN using Remote Desktop does not require you laptop or desktop to be joined to the Excell domain, neither do you need to login with your Excell login.
Once VPNed in to Excell's network run Remote Desktop located in your start menu under Start / All Programs / Accessories / Communication / Remote Desktop Connection.
When prompted for a computer name, enter the name of your computer that is located within Excell's network. If you don't know the computers name contact IT. If you do not have a computer with Excell's local network that you can connect to, you may connect to "EDC-TERMSERV".
Login to your computer using your Excell login and run RAD from there.

*Note this method of connecting to RAD is much faster than using a VPN connection alone.*

## Logging into RAD

You need to login to RAD using your personic login, not your Excell login. This login should have been assigned to you by IT. RAD knows what your user name is already and will display it in the User Name field of RAD's login screen. You only need to supply the password.
The first time you use RAD, by default, your password is the same as your login. But it's not case sensitive.

# General

## The RAD Paradigm

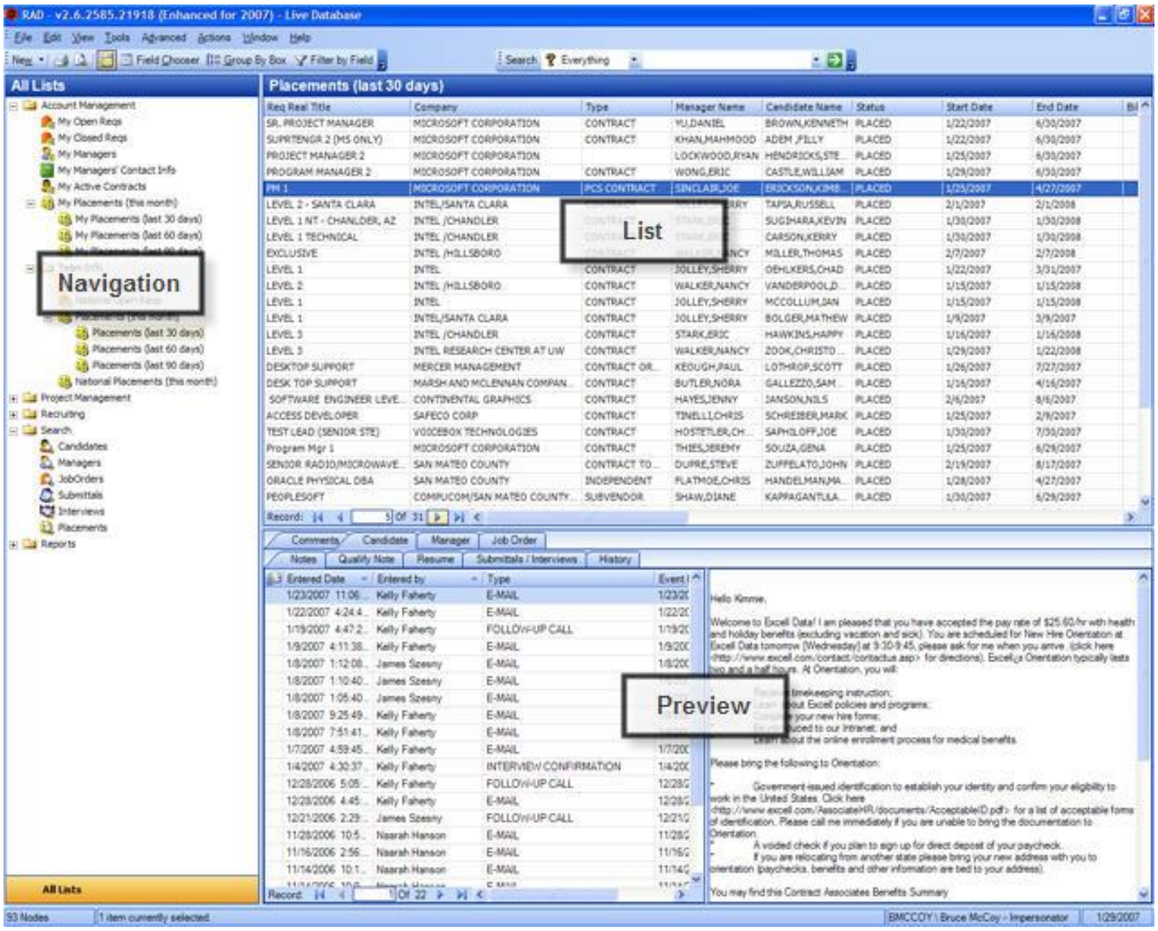
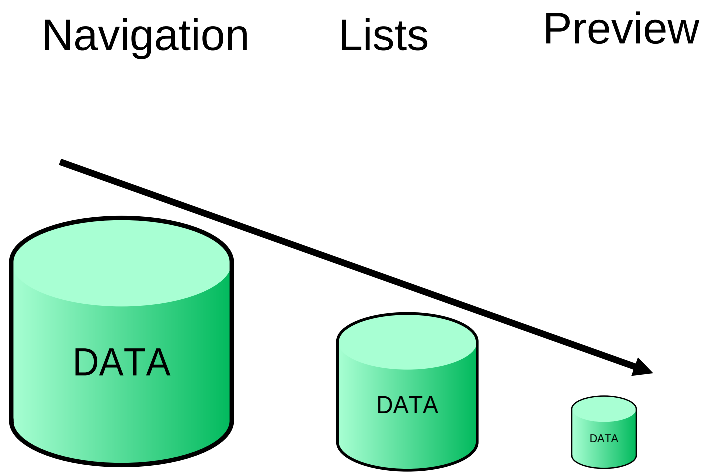



*Image 1 – the three parts of RAD*

The main screen of RAD is broken up into three main parts, the Navigation, List and Preview. Additionally, there is a toolbar and menu at the top, as well as a Quick Search.




Using these three parts in RAD together makes up the RAD paradigm. The paradigm works such that there are three levels at which to think about, organize and access data from the RAD database. Each level works together to help you comprehend differing amounts of data.

1. **Navigation**
   The navigation view provides the highest level of data abstraction. Data in this view is organized around a persons job responsibilities. For examples if you are a recruiter, you might be able to navigate to a list of your open job orders. In this way the navigation provides not only a high level comprehension of the type of data that you can access in RAD but also organizes it all to match your job responsibilities. This in turn lets you comprehend all the data in RAD that may be relevant to you.
2. **Lists**
   The lists view provides a way to compare records for a purpose. For example, if you are viewing a list of your opened job orders, and you have the purpose of figuring out which job order you should focus on next, you can use the tools in the list view to compare records to fulfill your purpose.
3. **Preview**
   The preview offers a way to investigate several facets of a single record. This view assists in quickly digesting the details of a single record without having to take your focus off your lists, where your purpose lies.

# Navigation

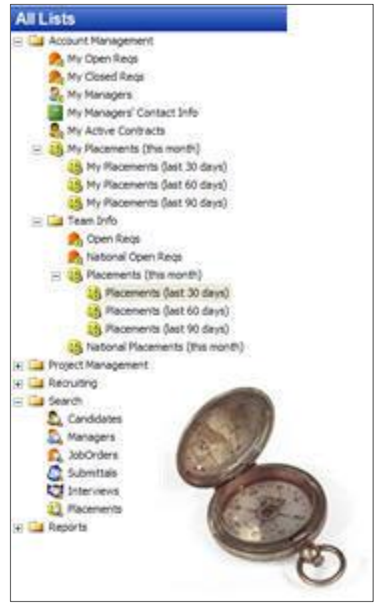



*Image 2 – Main navigation in RAD*

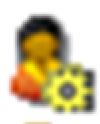
The left panel in RAD is used for Navigation. If there is a plus sign next to a node (item), it contains Lists inside it, otherwise you can click on the node and open the list. The Lists represent your job responsibilities and are grouped by like items, and sorted into a folder view like Microsoft Outlook, or Windows Explorer.

Lists only contain data of the same record type. For example, a list called "My Job Orders" will only contain job order records, it will not contain a mix of record types, like candidate records and job order records.

The type of records the list contains is designated by its Icon.

What can I see in RAD?


These are the most common list types you will see in RAD.



Some icons have a yellow cog. This indicates that the list is calculated by RAD and that records come in and out of these lists by themselves.

Others have no yellow cog. This indicates that the list is user defined. This means you can add and remove records from the list yourself.

## Common Questions about Navigation

## How can I find out what the calculation is for a list?

Right Clicking on any node and a context menu will appear, if you click on properties you can see information about what is contained in this list.

## How do I create a new user defined list?

Right click on “My Candidate lists”, (or any other user defined list) and select New List from the popup menu

## How do I move or delete an entire user defined list?

To delete select the list and press the delete key, or right click and select delete from the popup menu.
To move drag and drop the list in the new location you would like it to reside, or right click and select move from the popup menu

## How do I add or removed records from a user defined list?

Select the records you want to add from the list and drag them into the user defined list.  To delete them select the records from within the user defined list and press the delete key.

## How do I add a new calculated list?

Send an email to RAD@excell.com with your request.

# List

The List is located in the main content area in RAD.  (This is blank until you select your first list from the navigation) Here you will find a collection of item arranged in a table format.

Placements (last 30 days)

| Req Real Title | Company | Type | Manager Name | Candidate Name | Status | Start Date |
|---|---|---|---|---|---|---|
| SR. PROJECT MANAGER | MICROSOFT CORPORATION | CONTRACT | YU,DANIEL | BROWN,KENNETH | PLACED | 1/22/2007 |
| SUPRTENGR 2 (MS ONLY) | MICROSOFT CORPORATION | CONTRACT | KHAN,MAHMOOD | ADEM ,FILLY | PLACED | 1/22/2007 |
| PROJECT MANAGER 2 | MICROSOFT CORPORATION | | LOCKWOOD,RYAN | HENDRICKS,STE... | PLACED | 1/25/2007 |
| PROGRAM MANAGER 2 | MICROSOFT CORPORATION | CONTRACT | WONG,ERIC | CASTLE,WILLIAM | PLACED | 1/29/2007 |
| PM 1 | MICROSOFT CORPORATION | PCS CONTRACT | SINCLAIR,JOE | ERICKSON,KIMB... | PLACED | 1/25/2007 |
| LEVEL 2 - SANTA CLARA | INTEL/SANTA CLARA | CONTRACT | JOLLEY,SHERRY | TAPIA,RUSSELL | PLACED | 2/1/2007 |
| LEVEL 1 NT - CHANLDER, AZ | INTEL /CHANDLER | CONTRACT | STARK,ERIC | SUGIHARA,KEVIN | PLACED | 1/30/2007 |
| LEVEL 1 TECHNICAL | INTEL /CHANDLER | CONTRACT | STARK,ERIC | CARSON,KERRY | PLACED | 1/30/2007 |
| EXCLUSIVE | INTEL /HILLSBORO | CONTRACT | WALKER,NANCY | MILLER,THOMAS | PLACED | 2/7/2007 |
| LEVEL 1 | INTEL | CONTRACT | JOLLEY,SHERRY | OEHLKERS,CHAD | PLACED | 1/22/2007 |

*Image 3 – The List*

## Common Questions about Lists

### How do I refresh a list?

When viewing a calculated list RAD will automatically refresh the list every 10 minutes.  In addition, each time you navigate to a list, the list is automatically refreshed in the background.  If you want to force a list to refresh you can by right clicking the list and selecting Refresh from the popup menu.

### I've updated a record, but the changes aren't showing in my list?

Not all the lists in RAD update on there own when some of there data has been updated.  If you know the data should be different in the list and want to verify it actually saved you can force the list to refresh by right clicking the list and selecting Refresh from the popup menu.

### How do I select more than one record at a time?

(see Overall Tips and Trick below)

### How do I know how many records are in my list?

There is a record navigator at the bottom of each list that indicates the total number of records in the list.  If they record navigator is not visible you can make is visible by right clicking the list and selecting Record Navigator.

### I think some of the records are filtered.  How do I remove the filter?

You can remove the entire filter from a list by hiding the filter control.  To hide the control right click the list header and toggle Filter by Field to hide the filter.

## I've got a list just how I like it.  How do I make all my lists look this way?

You can copy and paste how a list is laid out by right clicking the header of the list and selecting Copy Layout from the popup menu.  Then select Paste Layout on the list you want to look the same.  Note: you will only get the option to paste your layout on lists that are containing the same type of data.  For example, you can not copy a layout from a job order list and paste it into a candidate list.

## How to I export data to Excel?

Right click the record, or records you want to export and select Export to Excel from the popup menu.  Note: some lists only allow single selection.  In these cases exporting the list will export the entire list to Excel.

## How do I open a record in EZAccess?

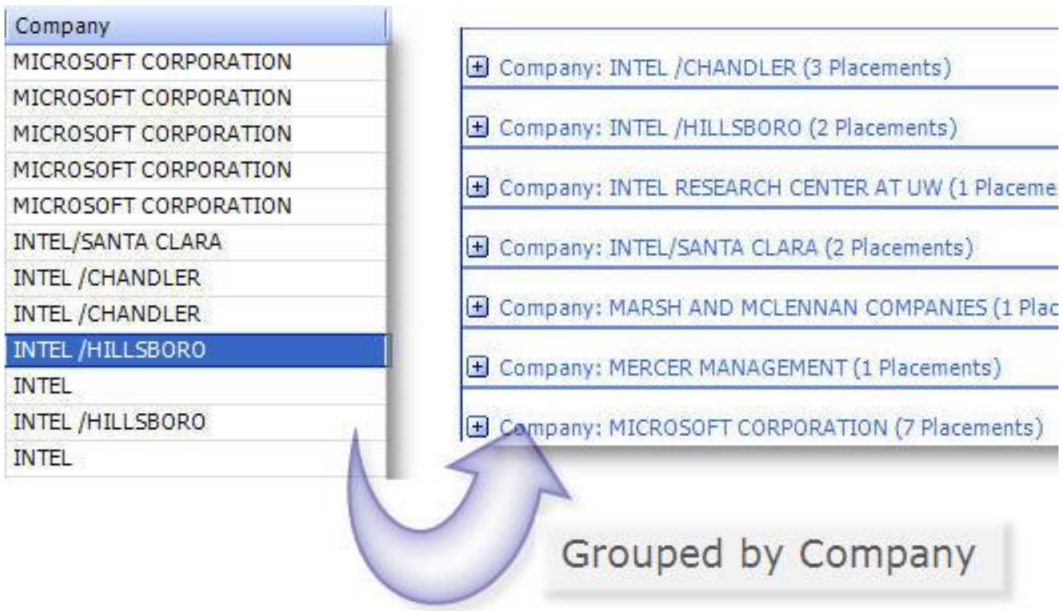
Right click the record you want to open in EZ and select Open in EZAccess from the popup menu.

The content will change from list to list, but there are some basic features that will remain constant in all lists;

- Grouping
- Sorting
- Filtering
- Field (Column) Manipulation

# Grouping

*Image 4 – Ungrouped and grouped list*




Grouping is a very powerful way to customize the list to suit your needs; any column in the list can be grouped on. Ultimately what happens is like items are grouped together taking one large list and breaking it down to many smaller lists of like items. In Image 4 above, the list has been grouped by Company, now instead of seeing 7 items that say Microsoft Corporation; there is one small group with all 7 together inside it.


**Grouping does not change the data of your list in anyway, it's all about organization.**

The easiest way to group by a column is to right click on the column header, (Blue Bar that says company in Image 5) and select “Group by This Field”

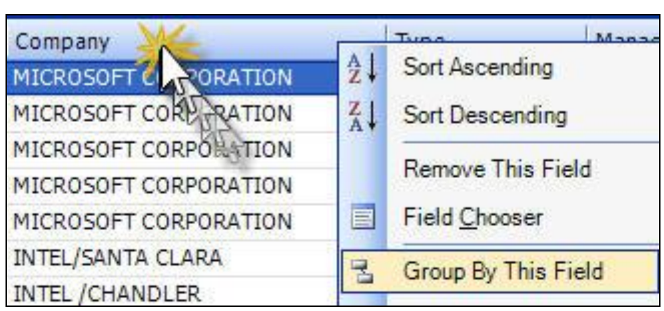
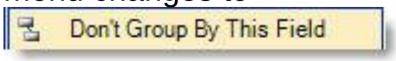



*Image 5 – Grouping by headers*

Your list will now look like the list on the right in Image 4, grouped by Company! By repeating the same step, on a column that is already grouped you will see the menu changes to




(Don't Group By This Field) selecting this will ungroup your list.


**You can group by 1, 2, 3 or as many columns as you want to further refine your list. Just repeat the steps above, but on other columns! For example grouping by company then type would give you a list that looks like this.** (Image 6)


*Image 6 – Grouped by Company and Type*

Drag n Drop grouping is another powerful way to group your lists. As soon as you start to group you will see the top of your list changes to show the grouping header.


*Image 7 – Group by header*

Now you can group by as many columns as you wish just by grabbing the header and dragging it into the group by area.

**Group by box not visible? There are two easy ways to get it to show up, in the main RAD toolbar locate the "Group By Box" button…or right click on any column header and select "Group By Box"**

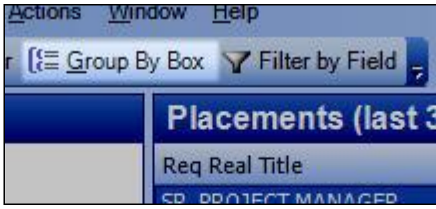


*Image 8 - Group By Toolbar*

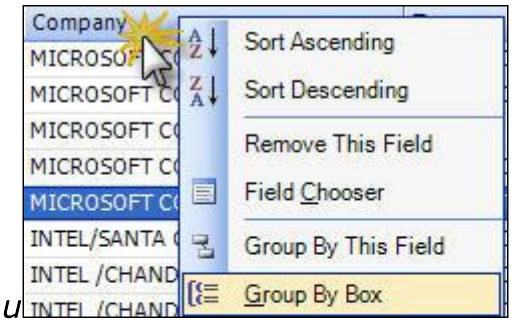


*Image 9 - Group By Context menu*

To remove a column from the grouping just click and drag it off the list and let it go!

*Image 10 – Removing Company from the group by box*


**You can also drag items and release them in the group by box to change the group by order, for example if your grouping by Company then Type, you can drag company past type and they switch positions!**

## Common Questions about Grouping

### All my groups become expanded sometimes. How do I collapse them all?

Right click on a group header within the main body of the list and select Collapse all Groups. Conversely you can Expand all groups too.

### I don't see the Group by box but my data is grouped. How do I remove the grouping?

First show the group by box by right clicking the list header and toggling the Group by Box option. Then drag all the items within the group by box out of it. You may then hide the group by box again.

## Sorting

All columns are sort able in the lists, sorting makes finding a particular item much easier if you know what you are looking for. In Image 11 below you see first a unsorted list of Titles, next a sorted list A-Z and finally a sorted list Z-A.

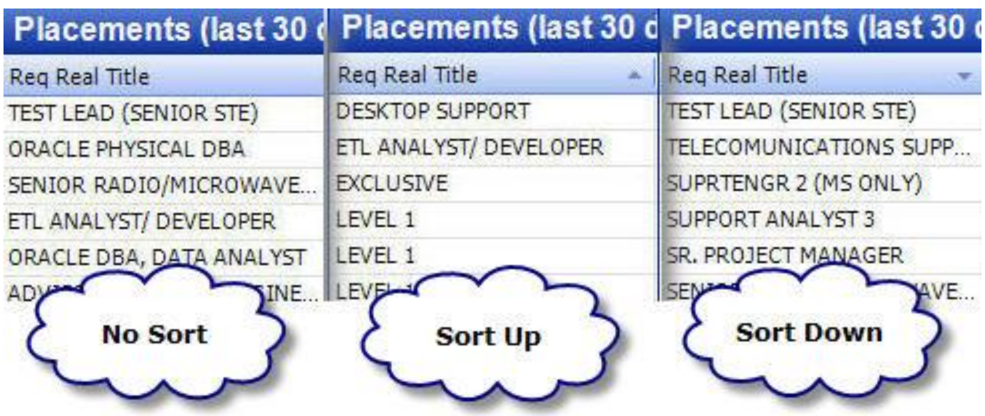



*Image 11 – Sorting*


**Sorting does not change the data of your list in anyway, only the order of items!**

Sorting is very easy, yet extremely powerful - simply click on the column header once to sort Up and a 2nd time to sort Down. At any time you can click on another column header and sort by the column instead.

*Image 12 - Sorting*


You can also use sorting in conjunction with grouping and produce a list that is highly customized for your needs. In your group by box (*if your unsure about a group by box read the previous section "Grouping" for information*) click on the header and the list will be sorted.


*Image 13 – Sorting and Grouping together*


**You can sort on 1, 2, 3 or as many columns as you want, by holding Shift then clicking on the headers. You can also remove your sort by holding the Ctrl while clicking on the column.**


*Image 14 – Multiple Sort*

Additionally you can sort by right clicking on a column header and selecting Ascending or Descending sort order.

**Text Columns are sorted by alphabetical order, numeric columns are sorted numerically, Dates are sorted by date, and some special columns like pictures are sorted by like items.**

## Filtering

Filtering is a way to reduce the amount of items in your list, to get down to only the items you're interested in seeing.


**Filtering <u>actually changes the data</u> in your list, once a item does not meet the requirement of your filter it is <u>no longer</u> in your list!**

You can filter on any column in your list. For example on company name you could add a filter of "Mic" and then your list would only contain companys that names start with "Mic".

To show the filter by box at the top of you list, either right click on the column header and select filter by field or click on the filter by button on your toolbar.

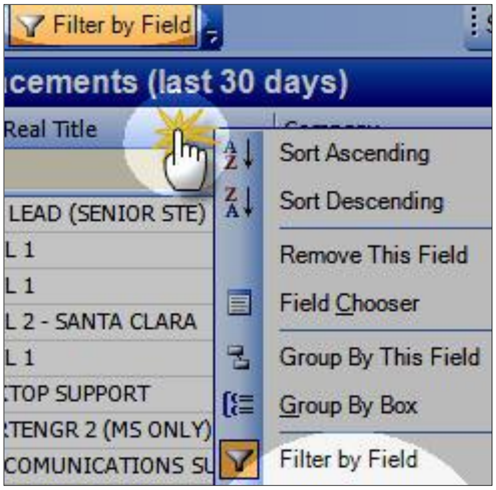



*Image 15 – Filter by Field. Both the main toolbar Filter by Field button or right clicking on the header in the list and selecting Filter by Field will show the filter area.*

**Unlike grouping or sorting filter by field shows up for the entire list not just one column.**

The filter box looks like another row of grey columns at the top of your list.

*Image 16 - Filter Bar*


To filter just type the text to filter by into the grey column and click enter.

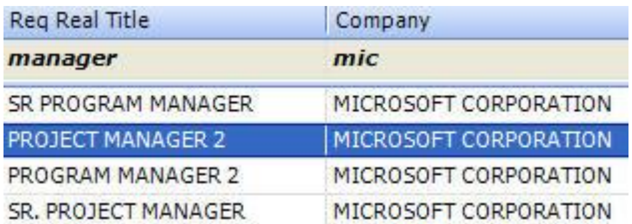
*Image 17 – Filter applied*


In this example you see that all companies that contains mic are now shown, all others are removed from this list.

To remove a filter click on the remove filter icon, by first clicking into the filter box to give it focus then on the right side of the box clicking on the icon. Once a filter is removed the list will return to its unfiltered state, it the filter bar will remain until you remove that.


*Image 18 – Remove a filter*


**You can filter on 1, 2 3 or more columns simply by typing in filter criteria on other columns.**



| Req Real Title | Company |
|---|---|
| *manager* | *mic* |
| SR PROGRAM MANAGER | MICROSOFT CORPORATION |
| PROJECT MANAGER 2 | MICROSOFT CORPORATION |
| PROGRAM MANAGER 2 | MICROSOFT CORPORATION |
| SR. PROJECT MANAGER | MICROSOFT CORPORATION |

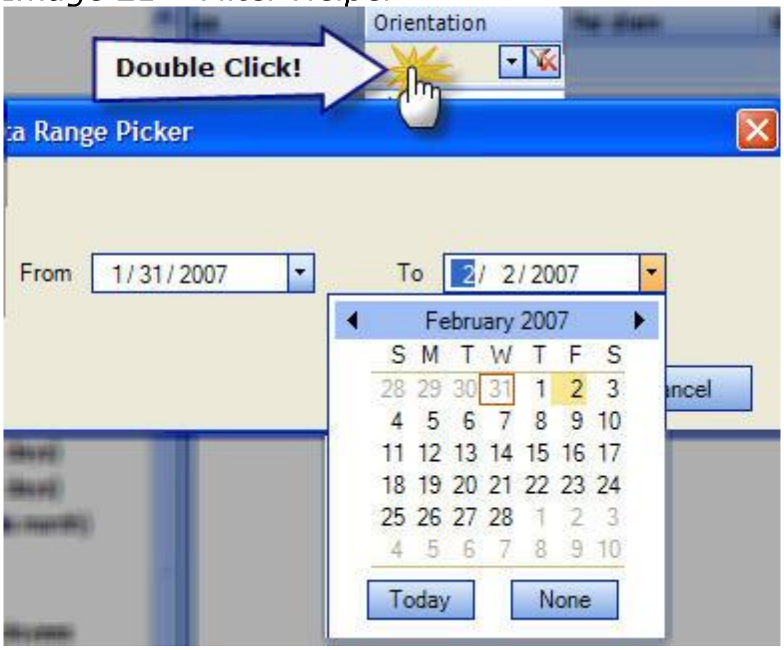
*Image 19 – Filter by Company and Title.*


**You can filter by more advanced criteria if you want, for example a date or number range, or greater then or less then a date or number.**

*Image 20 – Advanced filtering for a date range*


**Any time you get stuck on how to filter or what makes sense try to double click on the grey filter box, items that support ranges will open a dialog to help you create your own advanced filter criteria!**

*Image 21 – Filter Helper*





**There are a variety of advanced filter terms you can use while filtering. They are listed below .**

**All types of filter fields support the following terms:**
And, Or, Not and Null

**All Date and Number fields support the following terms:**
Syntax: Between [date/number] and [date/number]
> , <,  >=, <=

**All Text fields adhere to the following rules:**
filters without and/or joiners implicitly use and  (ex: micro corp == micro and corp)
string have wild card before and after (ex: ‘nin of amer’ will retrieve Nintendo of America)

All joins across multiple fields are explicitly “and”s
But joins within the same field may be designated “and” or “or”

“And” have a higher priority than “Or”s

Some examples of valid filters:
[on a date field]   >= 1/8/07 or between 1/1/07 and 1/2/07
[on a text field]   mark or brian and not thompson
[on any field]   not null.

# Field (Column) Manipulation

Each column in your list can bee added or subtracted at will.  Additionally you can rearrange them in any way you see fit.


**Field changes are stored on your computer, so whatever you select will be there next time.**

Each field can be rearanged by simply dragging and dropping it whereever you want.


*Image 22 – Default state (Title then Company) Click and drag the company header before the title header – release it and now Company is before Title.*

Removing fields is also easy, for example if a field is “Manager Name” and that has no baring on your daily work you can remove the clutter.  Right click on the column header and select Remove this field.

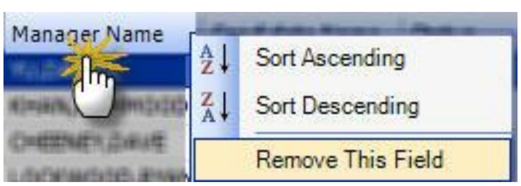



*Image 23 – Remove a field*

Also you can just drag a header as if you were going to sort but drop it off your list to remove it.

Adding fields back is just as easy as removing them.  RAD has a build in Field Chooser for just this task.

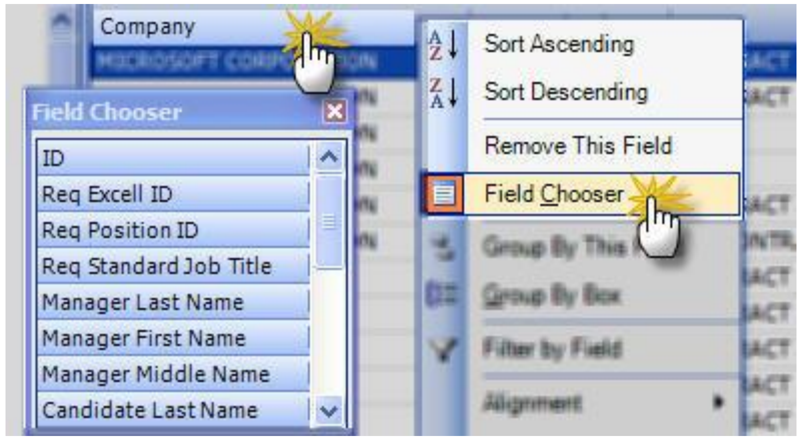
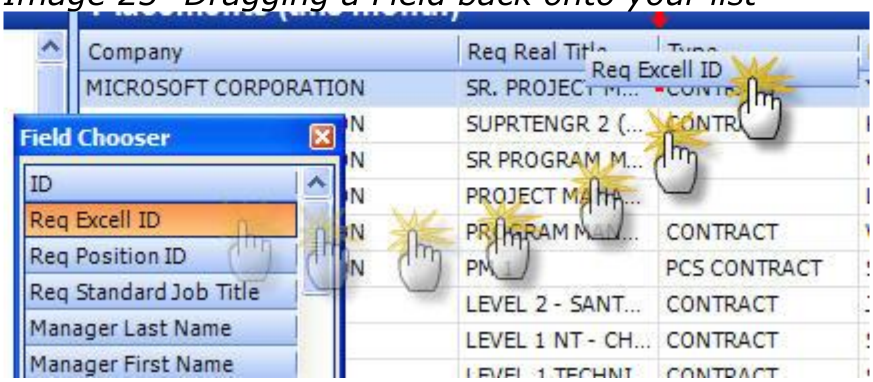


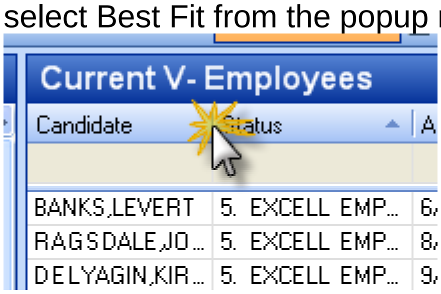

*Image 24- Field Chooser*

To get the field chooser right click on any column header then select field chooser. Now you can drag items right off the field chooser, back into your list.

*Image 25- Dragging a Field back onto your list*




You can also set the width of your field to the width of the data within the field by double clicking the resizable edge of the field or right click the list header and select Best Fit from the popup menu.




# Previews

The preview is a snapshot of the data one the item you have selected in the current list. The preview will vary greatly from list to list depending on the data contained in the list.

Some things that won't vary are previews are always read only; it's just a view of the data. If you need to edit the item you will have to open it up.

*Image 26 – A preview of a item in a list. Notice there is 2 rows of tabs, the first row Comments Candidate Manager Job Order is related to the selected item. The second row changes depending on what tab is selected in the first row, in this example we see the History related to the manager.*

Since each preview changes from list to list, explore them and find a good combination for your daily needs.

# Customizing RAD

By default, RAD will remember most every configuration you do to it by it self from one session to another. This includes everything from remembering which lists you have expanded in the navigation view to how you configured your quick search results list. In addition to a great memory, RAD also has a few custom configurations you can set yourself. These can be found in the options dialog. Select Tools / Options… from the menu bar.

# Overall Tips and Tricks

## Right click everything

RAD makes extensive use of right click popup menus. Much more than what is in the main menu. If you want to know what you can do with something, right click it.

## Copy and Paste

Some places in RAD do not have a copy and paste option in the popup menu. However you can still copy and paste anything you can select by using the copy and paste short cut keys
**Ctrl + C Copy**
**Ctrl + V Paste**

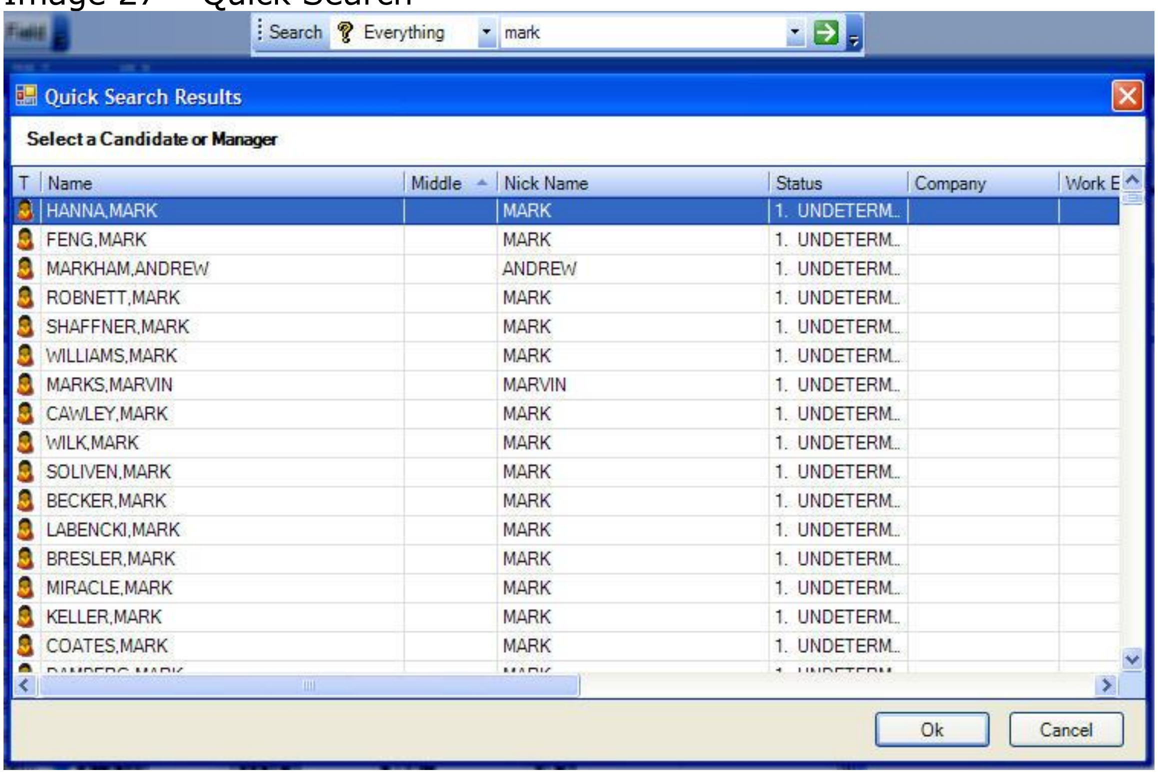
## Selecting Multiple records at a time

**Shift and click**
This will select a range of records
**Ctrl and click**
This will select multiple individual records. You can also remove items from you selection by holding ctrl and clicking too.
**Ctrl + A Select All**
This will select all the records in the list
**Shift click and Ctrl click together**
These are a great combo. Let say you have everything sorted just how you like it and want to select the first 10 records, except for one record in the middle. You could shift click to select the range of 10 records and then ctrl click on the record you want to remove from your selection.

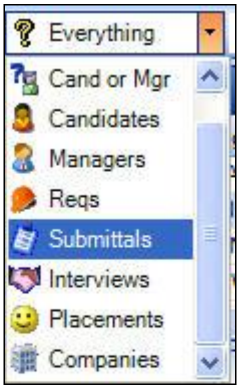
# Quick Search

The quick search is the easiest way to find an item if you know the record you are looking for. Quick search can not help you when you don't know the exact record you are looking for, but instead know only various criteria about the records of interest. For example. I want to see all candidates who where submitted to a particular job order last week. Searches like this are best served by using what you do know and drilling into the detail you don't know. For example, you could quick search the job order in question first. Then in the job order detail module view all its submittals and sort by date. Another alternative would be to use an advanced search to find the record.
Assuming you know the record you are looking for, Quick search is a easy way to obtain it.

Image 27 – Quick Search



The quick search box is located on your main toolbar in RAD.  You can search for any of the following;




If there is an exact match that item will open up, if there are more then one possible match, the Quick Search Results dialog will open up. (See Image 27 above) from here you can locate the proper result and select it to go to it.

**Remember, if you don't have the right fields to determin the right record, you can add fields and custumize your list by right clicking the quick search results list header. Don't be content with RAD's default view.**

**Advanced!**

**The quick search result dialog is a list just like all the rest, which means it can be filtered, grouped and sorted accordingly!**

In order to find a record in quick search, you must know something fairly unique about the record.  The things you can enter into the quick search vary depending on what RAD knows you are searching for.
To tell RAD what you are searching for, change the dropdown next to the quick search to indicate your focus record.  By default, RAD has everything selected. Even though this may seem the best setting.  There are times where you may want to change to a more focused quick search.  Below is a list of the thing you can search for depending on the quick searches focus record.

## Everything

**Names or partial names**
(examples: “bill”, “bill gates”, “gates,bill”, “ga b”, “william ga” “bill william henry gates”)
Returns candidates or managers.

RAD will search on combinations of first, last, middle and nick names

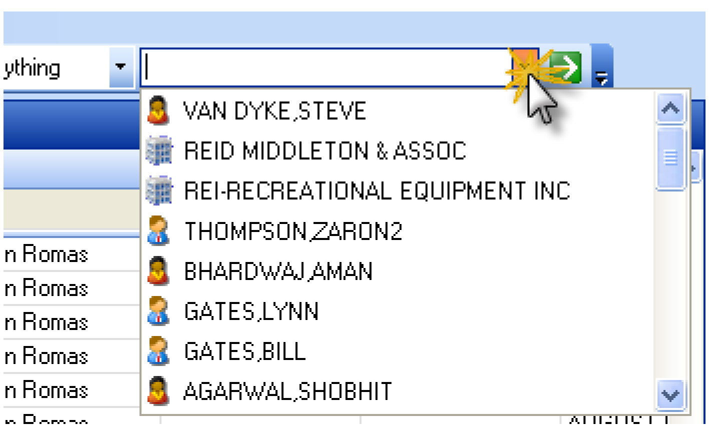
**Email address or partial email address**
(examples: "bill.gates@microsoft.com", "bill.gates")
Returns candidates or managers
RAD will search both work and home email addresses

**Phone number or partial phone numbers**
(examples: "(425) 882-8081", "425.88")
Returns candidates or managers
RAD will search both work and home phone numbers

**Excell ID or Position ID, must be exact**
(examples: "90494156", "13152")
Returns job orders

**Dates**
(examples: "1-5-2007", "1/5/07","1.5.07" "1 5 07", "january 5, 2007")
Returns submittals, interviews and placements
RAD searches on the date the record was entered

**Tip: If you have a last name that has a space in it and are having trouble quick searching the record it is because RAD doesn't know that the two words are all part of the same last name. You can tell RAD that the space is all apart of the same last name by seporating the first and last name with a comma. ( "Steve Van Dyke" becomes "Steve, Van Dyke")**




Anything you have recently quick searched for is stored in the quick search dropdown for easy access later on. The dropdown stores up to 30 records. When you access a record it moves to the top of your dropdown. This gives you a easy way to access your most frequently requested records without having to perform a search.

# Detail Views

Once an item is opened up the detail view is shown, this is the dialog used for editing or creating new items.  The view obviously changes dramatically from item to item.

Anytime you are in a detail view and you see underlined text you can click it to open up that item.

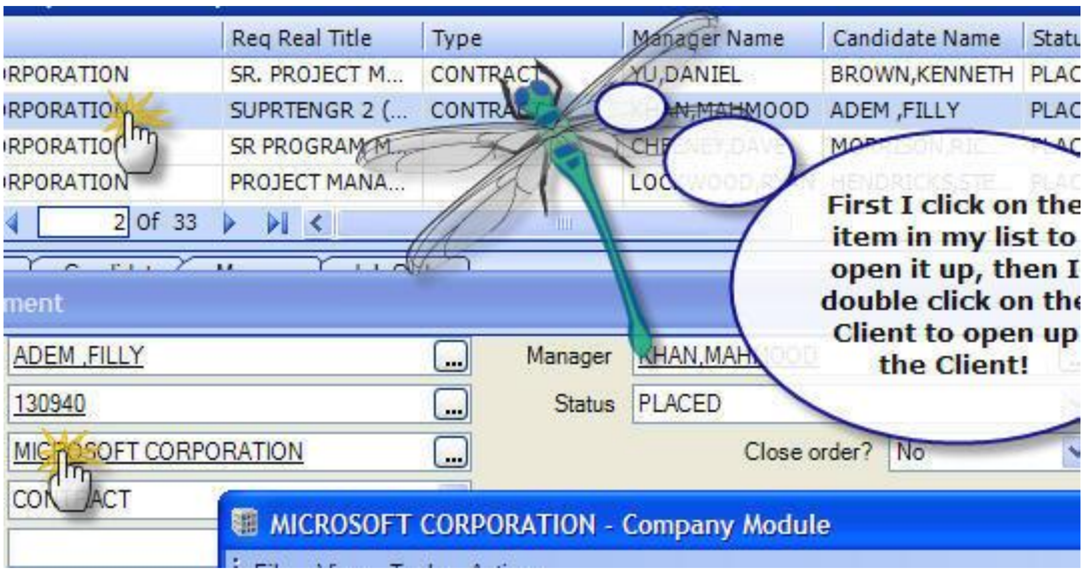


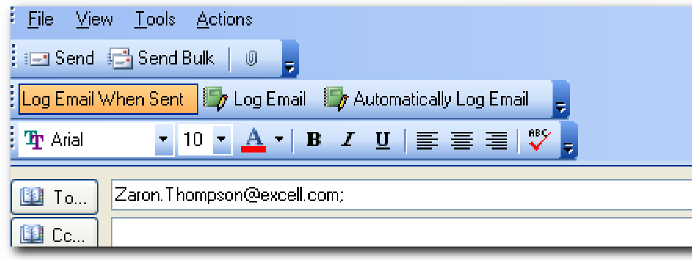

*Image 28 – Infinite drilling in detail views*

# RAD Email – Quick Help

## *Four opportunities to Log an Email*

### 1. Send it From RAD instead of Outlook

If you send an email from RAD you can log the email before you send it. If you have the “Log Email When Sent” feature turned on, RAD will even remind you to log your email.




### 2. When reading received emails in Outlook

Select the email you want to log and use the RAD toolbar in outlook to quickly log that email

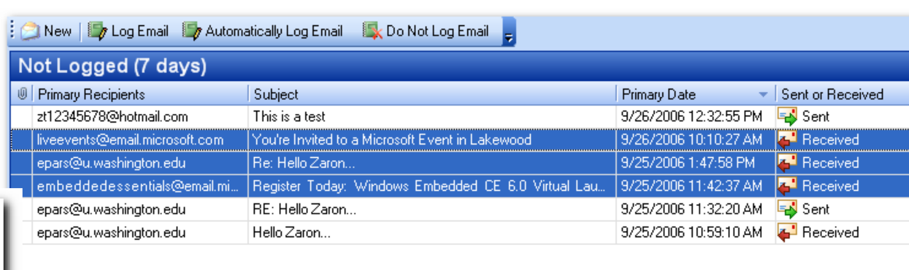

**Note**: the old RAD toolbar in outlook no longer works

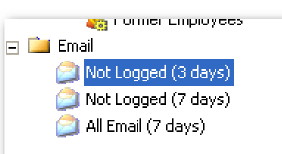
### 3. From an Alert

If you have send an email from outlook, not from RAD, or have received an email and the email is from someone in the RAD. Then you will receive an alert, giving you an opportunity to log the email.


### 4. From an Email List

Remember, you can log more than one email at a time from an email list



# RAD Email – FAQ

### Automatically Log Email


***Definition:*** *Will automatically grab comments from the note and save it without user interaction*

**How it works:**
If there are more than one candidate or manager, it will save a separate note for each person.
Will fail if the persons email address is not in RAD

**CAUTION: Try not to use Automatically log email just because its faster. Use it when its appropriate.**

**Appropriate for:**
Any email where the verbiage of the sender would be valuable as a note.

**Not appropriate for:**
Useless email chatter.
Long emails that should be summarized as a few words when turned into a note.
When you are lazy and just want the RAD reminders about syncing your emails to go away

### Bulk Email


***Definition:*** *This will allow you to compose one email message but send a separate copy to each recipient. You will see each separate copy in your Outlook Sent items.*

**Easiest way to use it:**
Right click a group of candidates and select Send Email. - DO NOT SELECT “Send Email (BCC)”

### Add an attachment to an email

Click the attachment icon on the toolbar
Or
Drag and drop a file on the header of the email. Note: This doesn’t work if you drag it into the body of the message.