

Chapter 10

Use the Create List

10-1. General.

a. Within the Leads-Reports application you are able to create lists to help you organize and access specific information quickly. As a recruiter, you create lists every day. An example is a precall list of leads for prospecting. With this function, you will be able to build your lists that will be easily accessible whenever you need them.

b. The following steps will show you how to use create list:

- (1) Access Create List screen.
- (2) Establish Search For parameters.
- (3) Save the new list.
- (4) Benefit of create list.

10-2. Access the Create List screen.



a. To access the **Create List** screen, click on the **ARISS-RWS** tab and then click on **MISCELLANEOUS**. This will be the same if you were at the ARISS main menu or in an applicant's record. Under the **MISCELLANEOUS** menu, there are three options. MAP and DEP/DTP Transfer and Assumption will be discussed in other chapters.

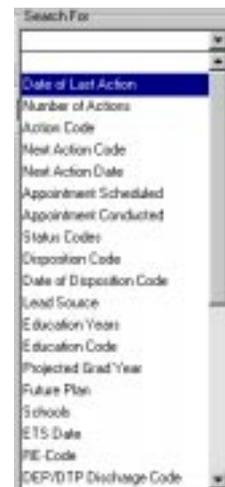


b. When you click on **Create List** this screen will appear. From an initial glance this does not look like much, but this is a fantastic tool. You will soon find out that this function will be your best friend in managing your records. Now let's get familiar with using **Search For**. This allows you to narrow your search to match specific criteria. You will notice that there is a field showing **Saved Lists**. If you have used this function previously and saved your list, you can select that saved list and click on **OK** and your list will appear. The information posted on the list will be based on the current records within your laptop. It will not hold old data from when you

worked the list previously.

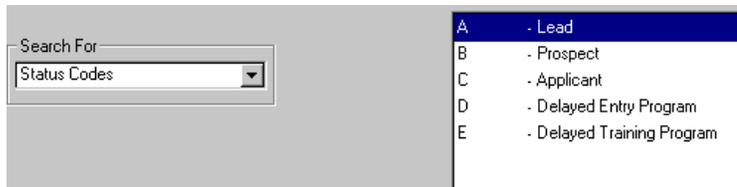
10-3. Establish Search For parameters.

a. Click on the **Search For** drop-down arrow and take a few moments to look at some of the choices you have for narrowing your search. For instance, if you want to target students graduating in 2 years, you would search by clicking on **Projected Grad Year**. Click the **Search For** scroll bar down arrow. As you can see, there are a lot of ways to search your ARISS database. In fact, suppose the Army is pushing for Ranger applicants. You can use the **Create List** function to **Search For** males specifically by clicking the **Sex** option.

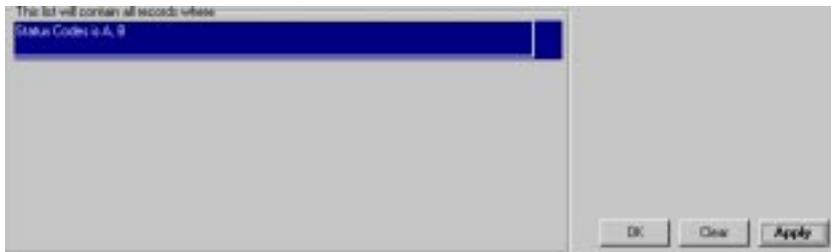


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b. Once you have selected one of your search parameters, another screen will appear requiring you to further define your search. For example, we want to do a search for all of your leads. Since this is a status code, click on the **Status Codes** drop-down arrow. You now see a range box appear. You will either select one or more of the items shown or enter the requested information. If you want to do a search for **Lead** and **Prospect**, hold down the **Ctrl** key and then use your mouse to click on **Prospect**.



c. Once you have selected the search criteria click **Apply**. Now check the information in the highlighted area. This list will show all the parameters that you've set for your search. You may select more than one option to filter your search. For instance, you can expand your current search to find

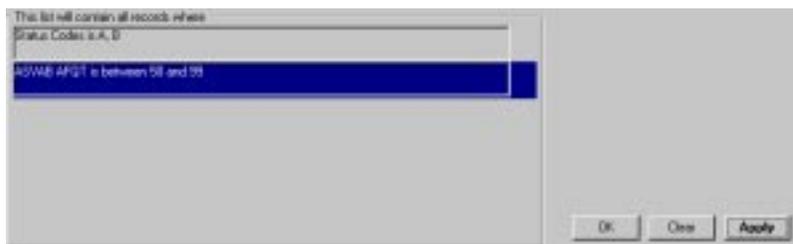


records that already have an ASVAB Armed Forces Qualification Test (AFQT) score of 50 or higher. You go back to the **Search For** drop-down arrow and scroll down and click on **ASVAB AFQT**. As you can see,

another range box opens to define what score range you want to search. Enter the score range and click on **Apply** again.

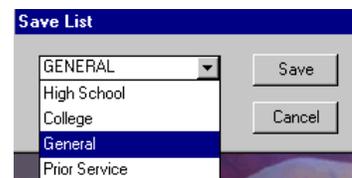
✓ You can continue selecting different Search For options to help you narrow your search.

d. Now that you have set your search parameters all that you have left to do is execute the search. Click on **OK**.



10-4. Save the new list.

a. A message box will appear asking if you want to **Save Query Parameters**. You will be required to select **Yes** or **No**. If the list you created is one that will be valuable in the future, then you'll want to save it for an easy reference, rather than duplicating your efforts. A list that has been saved can be accessed through the Find screen or through this screen. If you choose not to save the list, the results of the query will show immediately. You will have to save the **Create List** if you are going to use Mail Merge, which is discussed in chapter 18. To save a list, select the type of list you want to save, enter a file name that describes the list, and then click on **Save**.



✓ Apply will allow you to set your Search For parameters while OK will execute your search.

b. Depending on how indepth your search is, it should only take a few seconds to produce your report. Upon completion, you will either see the report or a message box that no matching records were found. When you click on **OK**, it will return you to the **Search For** screen so you can redefine your search criteria.



✓ The no matching records message may occur when you try to do a search based upon schools. If you remember, in chapter 9 the school must match what is in the drop-down list. Even though the school is listed on the Lead record, if it does not match exactly to a school listed in the range box, your search will not show any records.

✓ If you saved this list, it will be updated automatically every time you open it so you'll get the most current information from your search.

10-5. Benefit of create list.

a. Here are your query results. Notice that the total number of records found to match your query is listed at the bottom of your report. The next time you run your leads query, you may see a different number of total records listed because the query will automatically update with current information. Notice you are able to print a hard copy of this list. The **Dial** and **Dialing Properties** buttons will be discussed in a future update. The **Filter Recruiters** button is for your SC only and will be discussed in detail in chapter 19. Whether you

WSID	Rich Name	Person Name	SSN	Lead Source	Edu Years	Edu Code	AFQT	MOS	AOC	Exp. Ready Reserve	Phone
1AST	Wilans	Albert, Edgar		SASMB	5	51					(800) 482-6727
1AST	Wilans	Ancosa, Robert		SASMB	5	50					(800) 482-6675
1AST	Wilans	Bednar, Brian		SASMB	9	50					(800) 482-4050
1AST	Wilans	Dales, Matthew		SASMB	9	51					(800) 482-6685
1AST	Wilans	Denicola, Eric		SASMB	5	74					(800) 482-6267
1AST	Wilans	Darbeck, Michele		SASMB	5	51					(800) 482-6651
1AST	Wilans	Flecci, A		SASMB	5	59					(489) 084-2
1AST	Wilans	Goody, Ashley		SASMB	5	65					(800) 482-3621
1AST	Wilans	Hall, Ryan		SASMB	5	65					(800) 482-6215
1AST	Wilans	Haber, Moule		SASMB	9	51					(800) 482-7549
1AST	Wilans	Jardasko, Elijah		SASMB	5	52					(800) 482-6379
1AST	Wilans	Jukiewicz, Benjamin		SASMB	9	60					(800) 675-7381
1AST	Wilans	Kidrogis, Tishyn		SASMB	5	50					(254) 734-1729
1AST	Wilans	Kelly, Chelene		SASMB	5	70					(800) 482-6269

Total records found matching criteria: 20

Print Dial Dialing Properties Filter Recruiters Global Update

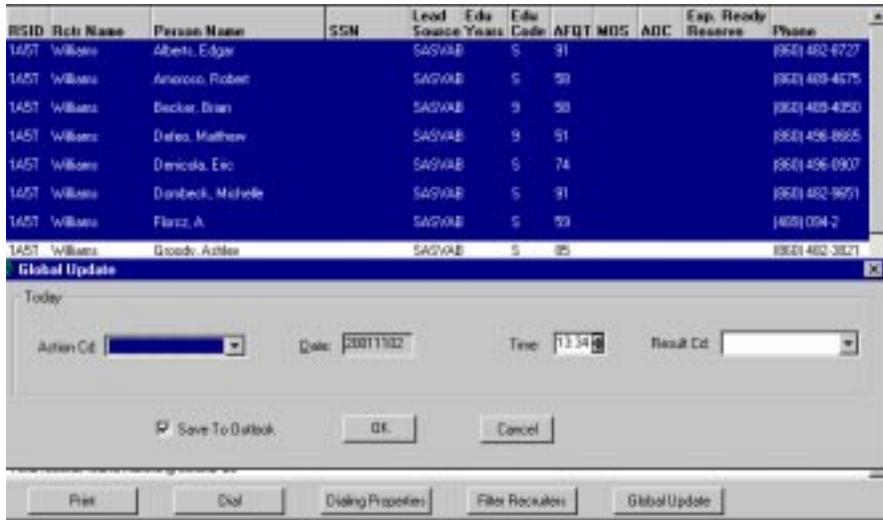
saved the report or not, after clicking on the message box your report will appear. Take a few minutes to review the information that it provides. Does this look like a lead refinement list that you manually had to work? There is more! The report will come to you sorted alphabetically. If you want to sort your report by AFQT, just click on the column header and the report will change to show the highest AFQT first. Click it again and it will start with the lowest AFQT.

b. If you decide to **Print** your list, the information on the list will not be the same that is showing on the screen. The printed version will show the individual's name, address, and telephone number, which will assist you with your door-to-door prospecting.

c. Another great thing about this list is if you double click on a record, it will automatically take you to either the **Lead** or **Prospect** record, depending on the status you assigned it. If you have already tried this out, you are probably asking, "Do I have to create another list to get this same report back again?" The answer to your question is no. This list will stay available until you close it. Notice the icons on the tool bar. You should see an icon that looks like a stack of yellow folders. Just click the **View** icon and your list will return. You can also bring back your list by clicking on **View** and **View List**. Once your list appears, double click on the next record and make that telephone call.



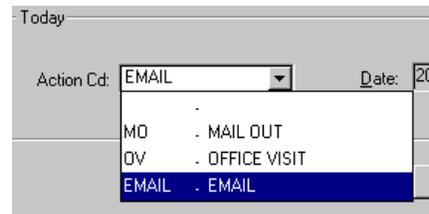
✓ Remember to annotate the **Contact History** screen with any actions taken.



d. You thought I forgot to discuss the last button called **Global Update**. If you have several records that you are updating with the same action and result code, this button will allow you to annotate all of the selected records at once. However, you will not be able to change the record status or record your next action from this screen. You can either select one record or several records and then click on **Global Update**. A small screen will appear for you to record your **Action Cd** and **Result Cd**.

e. You are limited on what **Global Update** will record in the **Action Cd**, but will save you time from opening each record and recording the individual entries.

✓ Remember to check the **Save to Outlook** box to show your actions in MS Outlook.



f. Can you see how this will save time in working those records that are important to you? Your imagination is your only limitation when using the **Create List** function. Since you just learned this function, you need to create a list of all your records to show the total number of records your system has and identify any duplicates.

g. Select all of the **Status Codes** on the **Search For**. After the list appears, look for those duplicate records. Identify the ones that you want to keep and code the rest as duplicate on the **Contact History** screen.

h. Also notice the **Close Record** icon.  You can use the icon or click on **File** and **Close Record** to exit this function.