How do I…run a CV search?

In this tutorial I am going to show you how to run a CV search. I'm going to:

- Explain what CV searching does and how it works
- Explain the layout of the CV search screen
- Run a search of CVs using several criteria
- Save search criteria for future use
- Review the results of a search
- Look at how you can move forward after running a search
- Run a quick search
- Run a saved search

In Recruit Studio there are effectively two databases: one for your contacts, so candidates, clients, companies and vacancies. These are records in the database and store lots of information in fields or boxes.

The other database in Recruit Studio contains your CVs – these are usually Word documents that candidates have either sent you by email or you have downloaded them from job boards. The two databases contain completely different information – a CV that a candidate has made in Microsoft Word is completely different to a database record – so we need to have different methods for searching these two types of database.

A CV search allows you to search through all of the CVs in your database. It uses a free text search which means that when looking for a particular word or phrase, if it appears anywhere in a CV in your database, the search will find it. You can search Word documents or PDFs, but to search PDFs you need to make sure this is set on the PC or server which holds the CV database.

What's great about CV searching is that you don't need to do anything special to a CV to prepare it for searching – you don't need to set skills or sectors or locations – you don't even need to create a candidate record for it. All you do need to do is import it into Recruit Studio's CV database and you're done. The built in search engine will do the rest.

Let's start off by exploring the layout of the CV search screen. You will find CV search on the main menu on the right of the screen. The page opens with a ribbon toolbar at the top, and two panels in the main area. The toolbar contains the functions you will need such as selections for the folder type you want to search and buttons for opening or creating a candidate record. The left hand panel in the main part of the screen is where your list of results will be displayed and the right hand panel contains the Search Assistant which will help you compose your search. Underneath this you can save and view your saved searches. After you have run a search the Search Assistant grid will be replaced with a panel that allows you to preview each CV in turn.

So let's now compose a new search.

The first decision to make is which CV folder I want to concentrate my search on. The way Recruit Studio organises CVs is to have several folders – the main one is called CV database and contains all the CVs. Most consultants prefer to search this one the majority of the time. However you can opt to search only among CVs that have a candidate record already in the database. The point of this is that, because you can import CVs on their own and leave them in your CV database, just as CVs without candidate records, it is useful to be able to specify which you want to target. The choice is made along the toolbar – CV database is ticked by default and this means that the search will search through all CVs irrespective of whether they have a candidate record or not. The other option is 'Candidate CVs'. Selecting this option means the search will concentrate only on CVs that are attached to a candidate record.

We're going to use the Search Assistant grid to build the search. I often get asked how to optimise CVs for searching. The simple answer is that there is nothing you can do to the CV itself to improve your results. But you can optimise your searches by being clear in your choice of words and phrases that you use in the criteria. Try to anticipate the language and phrases your candidates would use when writing their CVs to give the search engine the best chance. Also think about how you can compose the search to incorporate several criteria that match what you are looking for.

The Search Assistant is a grid where you type in words and phrases to build the search. There are labels on the left – Skills, Locations, Languages, Job Titles and Free Text – which are there to help you group together words and phrases and organise your search. The labels are just there to guide you, they don't limit you – CV searching is after all a free text search.

One way to look at the grid is that each row is a sentence. CV searching is Boolean which means that you can add the words 'Or' and 'And' and 'Not' in between the words to either narrow or broaden the search.

Let's imagine that I'm looking for candidates to fill a vacancy within the automotive industry. The candidates must have experience of manufacturing and be either at the production manager or project manager level. These are my criteria. Now that I have identified my criteria I can enter them into the grid. Of my four criteria, automotive and manufacturing are two skill types so I enter them into the Skills row.

I type Automotive and then Manufacturing. Now looking at that row, the default operator here is 'OR'. I don't really want the word 'OR' – a better match would be 'AND' otherwise I might get results containing the word Automotive but relating to sales or marketing which wouldn't be appropriate. So in this case I want to change the operator 'OR' to 'AND'. This now reads that the search is going to look for the words 'Automotive' and 'Manufacturing' in the same CV.

Let's now add the two remaining criteria. I need the candidates to be at either the production manager or project manager level, so a good label to place these next to would be job title. Again I type in the two phrases in separate boxes. In this case I don't need candidates to have both phrases mentioned in their CV – just one will do so I can leave the operator as 'OR' in this case.

I now have two sentences if you like – one for the skill types and one for the job title type. My final decision is how to relate the two to one another – the start of each row has an operator box. The purpose of this one is to let you choose whether you want to insert an 'AND', 'OR' or 'NOT' in between each row. In this case the one to use is 'AND' because I want candidate matches to contain both rows. For instance if I changed the operator to 'OR' I might get results of candidates who work in automotive and manufacturing but not at the right level – the search might return accountants or machinists for instance. So I change the operator to 'AND' and this completes the criteria.

I'm now ready to click Search but just before I do that I might want to save this search for use in the future. To do that I enter a name for the search into the box and this means that when I next want to run this search I can just select it from the My Searches panel at the bottom of the screen. Because it saves the search criteria and not the results list itself, any new CVs added to the database in the meantime will be included.

So I click 'Search' and the results display in the left hand panel and the new search has been added to the list of saved searches at the bottom. The results are displayed using their file names and you can also see when the CV was imported and which folder its held in. If I single click on one of the files I can preview it in the right hand panel. The search criteria are highlighted in red text. Occasionally you might want to open the actual CV Word document which you can do by clicking the icon in the top left corner and this opens the file in Word.

If I want to open the candidate record relating to this person's CV I can click the 'Open Form' button on the toolbar and the record opens. If a candidate record does not exist, the form will obviously not open. However you are able to create a new candidate from this screen by clicking the ‘Create Candidate’ button. This will automatically attach the CV to the record and you just need to then populate the record as you would any new candidate record.

Moving forward, you might like to shortlist a candidate for a vacancy. If you have a candidate record already or if you have just created one, you can open the vacancy record and go to the Candidates tab then look up the candidate by name and drag them in. If you only have a CV and not a candidate record yet, you can either create one or you can simply drag a CV from the CV look up panel and drop it into the Attachments panel of the vacancy or client or company. There is training material on our website on how to do this so I won’t go too in depth at this stage.

Going back to the CV search let’s finish off by looking at the other functions.

To go back to the search criteria just click ‘Show Search Assistant’ along the toolbar and it will appear again. You can also clear the whole search by clicking ‘Clear Search’ and start again.

Another option I have when composing searching is to run a quick search. Along the toolbar is a text box called Quick Search which allows you to enter words or phrase and search for that. You can’t save the search criteria but the benefit of this type of search is that you can very quickly look up some information or you can use it to enter a full Boolean string if you are familiar with typing Boolean commands.

To use it I simply type in a word and click the Search button at the end of the box, or I type in a phrase. When typing in a phrase you must use double quote marks to identify the criteria as a phrase otherwise it will try to look for the words separately. I can type the words ‘AND’ or ‘OR’ if I wish but I would generally recommend the Search Assistant for anything like that.

Finally if I want to run a search that I saved on a previous occasion I simply double click the icon and it will place the criteria into the Search Assistant box as well as run the search.

So to recap I have demonstrated how to compose a new search using the Search Assistant or Quick Search and how to view the results, as well as how to progress from this search by opening the candidate record or creating a new one.