

Video: Search & Mailings part 1

Welcome to the new search & mailings. There is lots on offer in the new search facility so the purpose of this tutorial is to demonstrate the scope of what is available and offer tips on how to make the most of your searching.

After you have watched this tutorial you might like to use the PDF help files available on our website to see how to compose your searches and the advanced features in more detail.

Search & Mailings is the function in Recruit Studio that finds the records in your database. It searches candidates, clients, companies and vacancies. There are a lot of search criteria that you could use to build searches: you can compose really simple searches to find lots of records, or you can add criteria together to produce focussed results. You can even merge two searches together and see what comes out!

On the main menu go to Search & Mailings. To get started, choose whether you want to search for candidates, clients, companies or vacancies and click on the relevant icon.

Now before you start to compose your search you're obviously going to have an idea of what criteria you want to include but you may not know how to compose it. So to make life easier we've divided the available criteria into categories. It's worth studying these categories so you can become familiar with the possibilities.

The search box opens in a new window and you now need to choose which category you want to search within. Let's take a look at the different categories on offer before we choose one. Candidates have the most information stored on their records and so have the most categories. They are all listed along the top:

- Proximity – this will find all the candidates within a given radius of a UK postcode.
- Properties – is the most commonly used category and includes all the options on this pull down box. This is where you will find all the common attributes of a record such as job title, location, sector and so on.
- Key Skills – this lets you choose the skills that you want candidates in your results to have.
- Primary Skills – if Primary Skills are enabled in your database, you can search through the most important skills relating to candidates.
- Segments – this allows you to find candidates belonging to a particular segment of a sector.
- Job related – includes all the fields on a candidate record that relate to a vacancy, they are listed on this menu.
- Salary – allows you to specify the salary amount that the candidate requests.

- Finally, Clearances – if you have these set in your database, you can search for candidates with particular clearance levels that you have established. The full list of clearance criteria are shown on this list.

In this first example I'm going to keep things simple and search for candidates with a particular job title. Job Title is found within the Properties category, so I click 'Properties' to show the menu.

I choose 'Job Title' from the menu and the list of possible job titles appears. If the job title you want to select isn't in the list, you can type it instead.

As soon as I make my selection, the search is entered in the panel on the right so you can see what it is building. In this case, I'm going to keep it simple and click 'Search' now to bring up the results.

Now if I want I can go back and add to the search criteria. For instance I might want to add another job title or I might want to specify a sector, location, key skill and so on.

If I double-click the name of the search on the left hand panel I can see the search page again.

Let's say I want to add a key skill to this search. I first need to select AND from the list – if you wish you can choose OR or even NOT depending on how you want to build the second criteria into the search. Select the Key Skill category from the top and then choose the skill I'm looking for from the list. Now another line has been added on the right, if I click Search I should get some more focussed results.

When the results open I can see that the second criteria has been added to a tree on the left. The number in brackets tells me how many candidates matching this description there are. The number that you see on the screen depends on whether you chose AND, OR or NOT. If I double-click the search I can see the search screen again and maybe add some more criteria.

This is all fairly straight forward stuff, I can add in other criteria to my search to widen or narrow the results. If you've used Search & Mailings in Recruit Studio before this stuff will be familiar to you. Where the new Search & Mailings features become interesting is in the more advanced features which I'm going to demonstrate in Search & Mailings Part 2.

Before you watch Part 2, I want to show you a couple more features which will help you. One really useful tool is the ability to save the searches you run so you can rerun them in the future. You will see that the panel on the left of my results page shows a tree of searches. Every time you run a new search and save the changes when you exit the window, the search criteria will be saved to this panel, you can rerun it at any point and if new records matching the search criteria have been added to the database since you last ran it, they will be included.

We have also introduced the concept of Public Searches which the Admin user can create. These can be seen and used by any consultant and they save the users time because the Admin user builds the search once. If you want to know how to save a public search, please take a look at the PDF help guides on this.

When you open Search & Mailings, if there is a search in the list that you want to run just select it and click 'Perform Search'. You might find it saves you a lot of time!

Another way to save your search is to save a snapshot of the results either to your Recruit Studio desktop or to a Vacancy. If you want to just save the results, you can click the File icon and choose one of the Save As options.

Top tips for searching:

- Have the search clear in your mind before you start.
- Think about all the criteria you want to include, write it down if it helps you.
- Save searches so you can rerun them at any time in the future.
- Get familiar with the menus in Search & Mailings so you know what is achievable in searching; there is a lot in there!
- The types of search are listed at the top of the pop up window, each type will perform a different search and you can combine them together for greater focus.

You'll get the most out of your searches if you put plenty of information into the database in the first place!

If you want to learn how to compose searches using our step by step PDF help guides please visit our website to see the full list otherwise you might like to watch Part 2 to find out about building useful complex searches.