

Video: Search & Mailings part 2

This tutorial follows on from the basic functions of Search & Mailings and here I will demonstrate how to use the new advanced features. So far I've composed a candidate search using a property (in this case Job Title) and a key skill. Note that both criteria are in different categories, as described in the Part 1 tutorial.

Quite often you will want to add another one or more criteria to your search and that's what I'm going to demonstrate now.

When entering the criteria into the search screen, you may have noticed another panel at the bottom of the window with various buttons. What this allows me to do is tweak my search selections to shift the focus of the criteria by changing the ANDs and ORs and adding brackets if I want. It even allows me to rewrite the search string using the components (job title, key skill) that I previously selected. You would use these functions when you have 3 or more criteria to include.

To demonstrate this I'm going to add another criteria to my original search that is very similar to one of the others. I could for instance add another key skill. If I wanted to look for a job title and either one key skill or another key skill I would need to include some brackets so Recruit Studio knows to group the two key skill criteria together.

Click 'Start' and the previous string is removed. I choose my first criteria from the pull down which is going to be job title and then I use the button to formulate the sentence. I click AND and now an open bracket. I'm now ready to add in my two key skills that I want to find. Choose the first key skill from the pull down and add an OR button, followed by the second key skill and finally a close bracket. My original sentence has been rewritten to subtly change the focus of the search which will produce different results. So now my search reads: candidates must be (job title), with either (skill1) or (skill2).

Another function you might find useful is that you can drag the brackets and AND, OR, NOT buttons into an existing search without having to rewrite it. You can also manually edit the string, so I could delete the last section and drag in the buttons to recreate it.

Here are some examples of the other combinations you could have if you wished:

- KeySkill1 OR KeySkill2 OR KeySkill3 OR KeySkill4
- JobTitle1 AND JobTitle2 AND JobTitle3
- JobTitle1 AND (Location1 OR Location2 OR Location3)
- (Sector1 AND Segment1) OR (Sector2 AND Segment2)
- (Sector1 AND (KeySkill1 OR KeySkill2)) OR (Sector2 AND (KeySkill3 OR KeySkill4))

Another new advanced feature is that I can merge two searches together. I run one search with a set of criteria and then build another search with a different set of criteria and Recruit Studio can merge both sets of results together using AND, OR or NOT. Both searches will appear on the left hand panel and I can choose to exclude various criteria if I want to review the search.

This function adds another layer of complexity on top of my previous search and it can be a really useful tool. To begin another search, I click the Candidates button again – note that you must stick to one type of record, you can't merge a candidate search with a client search.

I select the criteria in the normal way first using the category and then the detail. You can see that another panel has been activated and allows me to choose whether to merge the results of the searches using AND, OR or NOT.

To see some examples of how to build popular searches, please take a look at the PDF help files on our website. These provide a step by step guide on how to compose searches.