



### 3. |

## THE BEST RESUMATE SEARCHING PRACTICES

**I** can't believe how good this is... seriously, this is just great software.

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### INTRODUCTION:

Searching is one of the most important functions of the RESUMate program. The purpose of searching is to find ALL of the candidates in your database who might be suitable for a particular job opening.

Notice that the purpose of computer searching is not to find the "perfect" candidate, but rather to find all possible candidates. One goal of searching in RESUMate, therefore, is completeness. We don't want to overlook any candidate in the database who could be considered for any particular position.

RESUMate offers the same functionality as is commonly understood by the term "full Boolean searching." The implementation method is actually simpler, but the result is the same: you can connect any data items in any part of the RESUMate record using the logical expressions of AND, OR, and NOT.



### Lunch & Learn Seminars:


Online seminars are offered daily at Noon, Eastern time, USA. Twelve topics are offered in three series:

- the **Basic Series**..... 1-4
- the **Advanced Series**..... 5-8
- the **Recruiter's Tool Kit**..... 9-12

### Topic List for Seminar 3:

- 3.1 RESUMate offers 2 search dialog boxes: Easy Search and Full Search.
- 3.2 Use Easy Search if you're searching to find records based on just one or two criteria.
- 3.3 The top 3 lines of the Easy Search screen offer some useful shortcuts and handy features.
- 3.4 Use Full Search if your search requires several criteria, and includes 'AND', 'OR', and 'NOT' conditions.
- 3.5 You can "knock records out" of a search result, narrowing the original group down to a few survivors.
- 3.6 Completing a search assignment takes time. You can save a RESUMate search and come back to it at a later date.

### 3.1 | RESUMATE OFFERS 2 SEARCH DIALOG BOXES: EASY SEARCH AND FULL SEARCH.

To begin, click this icon  in the list of icons on RESUMate's main tool bar (FIGURE 3.1, 1). It opens the Search People dialog box. By default the Easy Search dialog box will be opened.

If your search is simple (e.g. if you're looking to find records that match a date, or a date range, or records that have one or two words or phrases in a resume) then the Easy Search dialog box is the right starting point.

For more complex searches, involving several criteria linked by AND, OR, and NOT conditions, the Full Search screen will be required. To open this dialog box, click the Full Search tab (FIGURE 3.1, 2).



tip #1

*Help from the RESUMate program:*


**Use the Help system:** When the Search dialog box is open on your screen, simply **TOUCH F1** on your keyboard for a complete, illustrated discussion of this function.



tip #2

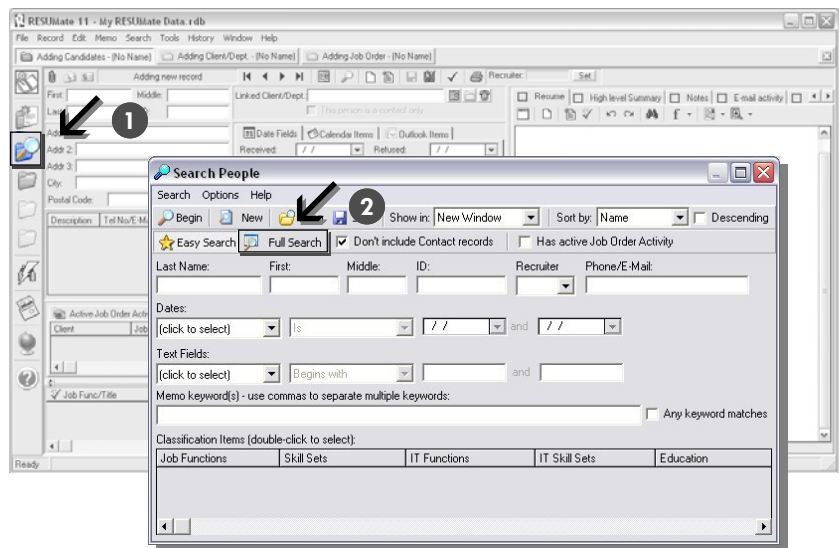
*Search client, or job order records too:*

Most searches are for the purpose of finding Candidate records that fit a profile, but in the Professional version, you can also search Client records and Job Order records.

Start from a Client or Job Order record. **Click the small magnifying glass icon**  in the horizontal tool bar at the top of the screen.

The searching **method** is the same as described in this document for Candidate records.

FIGURE 3.1 RESUMATE SEARCH DIALOG BOXES



After a little bit of use, you'll easily see which starting point is right for the search you're about to do.

The basic idea is this: any data item in a record can be combined with other data items, for the purpose of finding just those records that match any set of criteria. For example, you can find just those candidates who have been added to the database in the **last 6 months**, whose resume contains either the word **programmer** or **analyst**, and who currently reside in the states of **New York** or **California**.

As long as an item of data is contained someplace in the RESUMate record, it can be included as part of a "search argument" that will isolate just those records that contain these data items.

### 3.2 | USE EASY SEARCH IF YOU'RE SEARCHING TO FIND RECORDS BASED ON JUST ONE OR TWO CRITERIA.

The **Easy Search** screen provides an easy method for searching date fields, text fields, Memo titles, and RESUMate's keyword list called the **Classification table**.


For date fields (FIGURE 3.2, ❶), select the target date field in the left-most box. In the box to the immediate right, select the search term that best suits your requirement, such as 'is on or before'. In the final field, click or type the date.

For text fields (FIGURE 3.2, ❷), select the target text field in the left-most box. In the box to the right, select the search term that best suits your requirement, such as 'is' or 'contains.' In the final field, type the word or phrase you're looking for.



#### ▽ tip #3

*Help from the RESUMate website:*

This topic is also covered in video form  on the Training page at our website ([www.resumate.com/training.asp](http://www.resumate.com/training.asp)).


Click on the link titled "Training Videos Page" in the box labeled "In Depth Tutorials" and play the video titled **Searching**.

FIGURE 3.2 EASY SEARCH


Job Functions	Skill Sets	IT Functions	IT Skill Sets	Education
				BS Computer Eng

To search for words and phrases in the Memo section (FIGURE 3.1, ❸), simply type the words or phrases you're looking for in the box provided, separating each word or phrase with a comma and a space. Check the box called **Any keyword matches** to the right of the box if this is an **OR** search. If this is an **AND** search (all words and phrases must be found), do not check this box.

To search for words and phrases that have been pre-loaded into RESUMate's Classification table (FIGURE 3.1, ❹), double click on the appropriate column title. Then select one or several items from the column. If you have selected more than one item, and this is an **OR** search, check the box labeled **Any item matches** to the right of the item list. If this is an **AND** search, do not check this box.

Once all of the search criteria have been entered, click the **Begin** button  at the top left of the screen to start the search. Most searches will be completed in just a few seconds.

### 3.3 | THE TOP 3 LINES OF THE EASY SEARCH SCREEN OFFER USEFUL SHORT-CUTS AND HANDY FEATURES.

*The top line:* Click the down arrow  in the **Sort by:** field to select the sequence in which the search result will be displayed (FIGURE 3.3, ❶). The default choice is **Name**, which will list the search result records alphabetically by last name, but you can also choose to list the search results by address information, or by any date or text field.

*The second line:* The box labeled **Don't include Contact records** is checked  by default (FIGURE 3.3, ❷). Its purpose is to eliminate from a search result any hiring managers or other sales contacts at a client company whose records would otherwise be included with candidate records found in a search.

In the Professional version, simply checking the box labeled **Has active Job Order Activity**  and clicking **Begin** will create a search result showing all candidates who are currently being interviewed on at least one job (FIGURE 3.3, ❸).



▽ tip #4

#### *Searching for names:*


Name and ID fields are included in the third line of the Easy Search dialog box, but the **Quick Search function**, accessed from the **lightning bolt icon**  in the main tool bar is the preferred method for finding records based on name information.


FIGURE 3.3 THE TOP 3 LINES OF EASY SEARCH

The screenshot shows the 'Search People' dialog box with the following fields and features highlighted by numbered callouts:

- ❶: Sort by: Name (dropdown menu)
- ❷: Don't include Contact records (checked checkbox)
- ❸: Has active Job Order Activity (checkbox)
- ❹: Recruiter (dropdown menu)
- ❺: Phone/E-Mail (text field)

Other visible fields include: Last Name, First, Middle, ID, Entered, Is on or after, Title, Memo keyword(s), and Classification Items.

Job Functions	Skill Sets	IT Functions	IT Skill Sets	Education
				BS Computer Eng

*The third line:* Clicking the down arrow  next to the recruiter field displays the initials of all of the recruiters in a network environment (FIGURE 3.3, ❹). This allows a search result based on any content to be limited to just those records that also include a specific recruiter's initials. (*Note:* to create the master list of recruiters' initials, go to **File | Database | Tools | Recruiter Maintenance**).

The Phone/E-mail field (FIGURE 3.3, ❺) allows searches based on an exact match of a complete phone number or e-mail address, or of a component such as an area code, or the URL portion of an e-mail address. To search by area code, simply type in the 3-digit code (no parentheses or dashes needed).

**3.4 | USE FULL SEARCH IF YOUR SEARCH REQUIRES SEVERAL CRITERIA, AND INCLUDES “AND”, “OR”, AND “NOT” CONDITIONS.**

The Full Search dialog box provides an easy method for creating complex searches that use the three Boolean logical conditions of AND, OR, and NOT.

Data items from *any* portion of the RESUMate record can be combined, using these logical operators, with data from any other part of the database record. Data is entered into three columns, labeled **Field**, **Comparison**, and **Criteria**.

In the **Field** column (FIGURE 3.4, ❶), select an item that represents one criterion for the search. A drop down list gives access to all data items in the database record.



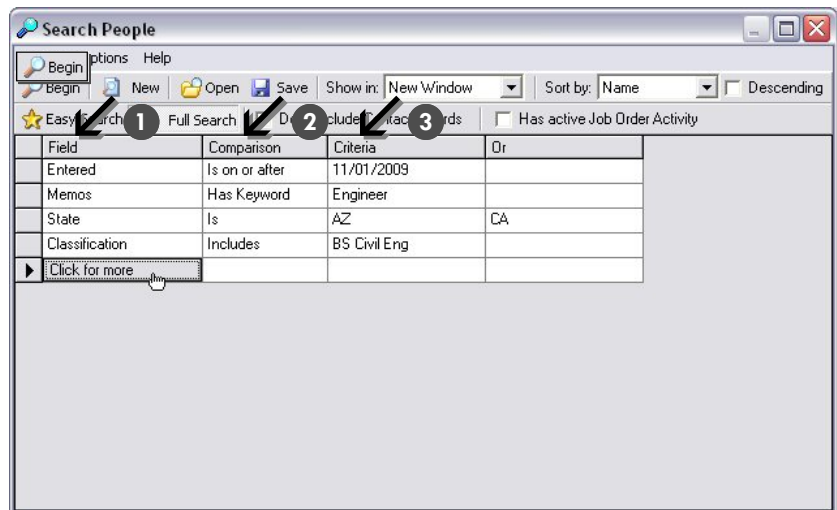
▽ tip #5

*Deleting a row from the Full Search screen:*

To delete a row that has already been entered, simply position the cursor arrow in the Field column box for this row, and **TOUCH THE DELETE KEY** on the keyboard.

It may be desirable to delete a row if the search result obtained is too narrow. Deleting a row will normally have the effect of increasing the number of records that will be included in the search result.


FIGURE 3.4 FULL SEARCH



In the **Comparison** column (FIGURE 3.4, ❷), choose from a list of plain English expressions that best describe your intent in searching for the data item selected in the **Field** column. The **Comparison** column includes logical NOT expressions, such as **Does not include** or **Does not contain**.


In the **Criteria** column (FIGURE 3.4, ❸), type or click the word, phrase, numbers, or date that best completes the simple sentence (subject/predicate/object) that has been started in the first two columns.


A complex search can be made up of any number of rows. Each completed row represents one AND condition. Every row that is created must be true of a record for that record to be included in the search result.

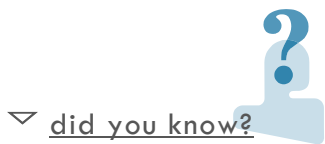
Once you have completely expressed your search criteria, using as many rows as necessary, click the **Begin** button  at the top left of the screen to start the search. Most search results will be returned in just a few seconds.

### 3.5 | YOU CAN “KNOCK RECORDS OUT” OF A SEARCH RESULT, NARROWING THE ORIGINAL GROUP DOWN TO A FEW SURVIVORS.

When the search is completed, the records found in the search will be displayed in a new window. The count of records found **Search result 1 of 5** is shown in a box in the upper left corner of the first record in the search (FIGURE 3.5, ❶). All data matching the search criteria will be displayed in bold red type (FIGURE 3.5, ❷).

The arrow icons  at the top of the screen allow you to move from record to record within the search result (FIGURE 3.5, ❶).

The list icon  to the right of the arrow icons allows you to see a list view of all of the records that have been found in the search (FIGURE 3.5, ❶).



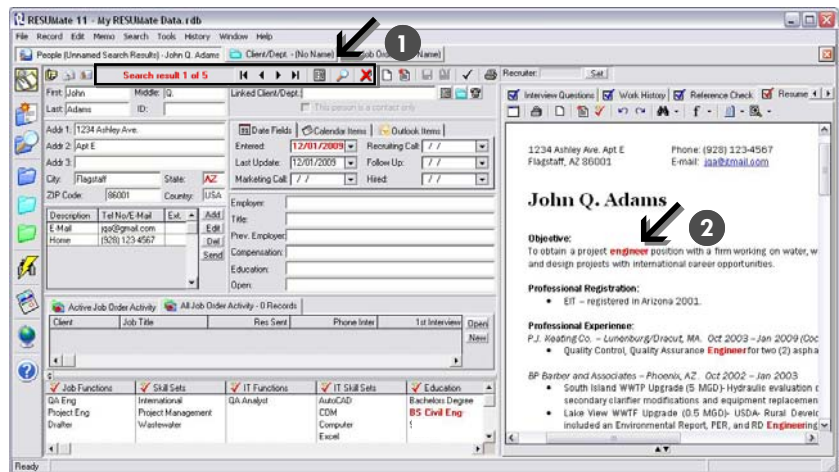
did you know?


*Before you even pick up the phone...*

Before you can make a final determination of a candidate’s suitability, a phone conversation with the candidate will certainly be required. Nevertheless, there’s lots of information in the RESUMate record itself that will help you make a preliminary determination, greatly reducing the number of people you’ll need to call.

The Memo section contains the resume itself, plus notes of prior phone conversations. If you use an Interview Questions template, there will be much more information here. If you use Outlook, you can click to see all of your e-mail traffic to and from this person.

FIGURE 3.5 THE SEARCH RESULT



The Search Result screen contains a new icon not found in the main database view: a red X on top of the magnifying glass icon  (FIGURE 3.5, ❶). Clicking this icon knocks records out of the search result, without, of course, deleting the record from the database itself. When this icon is clicked, the record on the screen disappears, and the screen view is advanced to the next record found in the search.

After knocking out records in this way, click **Search | Refresh Search** (in the Menu line at the top of the screen) to permanently remove the excluded records from the search result window.


Usually, even a well constructed search argument will return the records of more candidates than will be forwarded on to the hiring manager. This “knock-out” function allows you to narrow down the search result to just those candidates who are most qualified for a particular position.



▽ tip #6

*If new matching records have recently been added to the database...*

When you open a saved search, the first screen you see will be either the Easy Search screen or the Full Search screen, whichever search dialog box was used to create the search in the first place. This is to accommodate the fact that new, matching records may have been added to the database since the search was last opened. If this is the case, then these records will be included in the new search.

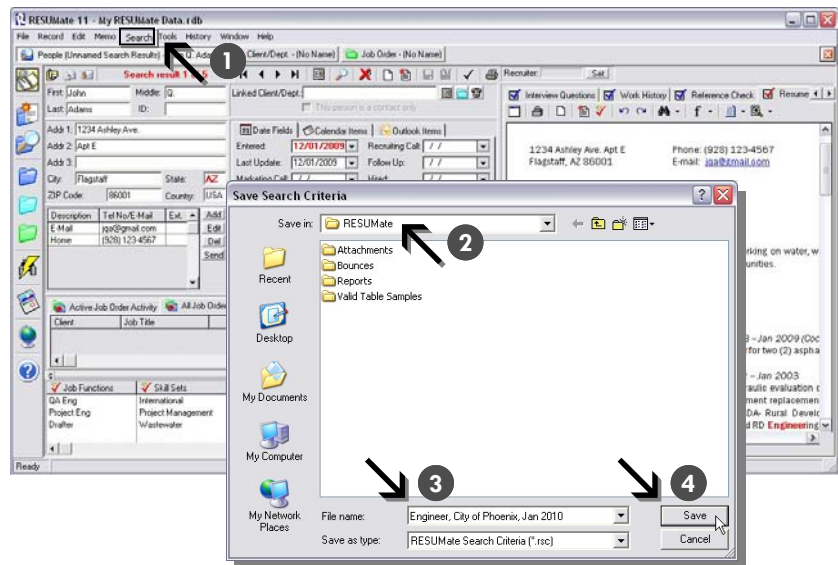
**Click Begin**  to see the new search result. Any records that had previously been knocked out of the search will not be included in the new search results view.

### 3.6 | COMPLETING A SEARCH ASSIGNMENT TAKES TIME. YOU CAN SAVE A RESUMATE SEARCH AND COME BACK TO IT AT A LATER DATE.

The process of narrowing down a search result, or of changing the criteria based on new information, can take days or even weeks to conclude. For this reason, it's often necessary to save a search, and then come back to it again some time in the future.

Saving a search means saving the search criteria in their most recent form, and also saving the search result, in the sense that records that have already been “knocked out” of the search result should stay knocked out.

FIGURE 3.6 SAVING A SEARCH RESULT



With the search result on the screen, click **Search | Save** in the Menu line at the top of the screen (FIGURE 3.6, 1). This will open a standard **Save As** dialog box. You may want to create a folder called **Saved Searches**, or simply choose to save your searches in your main **RESUMate** folder (FIGURE 3.6, 2).

Typically, when naming the search file, use some combination of the job title, the client's name, and possibly today's date (FIGURE 3.6, 3). After you've given your search result an appropriate name, click **Save** (FIGURE 3.6, 4).

Finally, to open a previously saved search, click **Search | Open** (FIGURE 3.6, 1). Browse to the folder in which you have saved your previous searches, and click the search file name.