Introduction to Record Searching

Searching · https://learning.pcrecruiter.net/site/docs/searching/introduction-to-searching/

Before delving into Basic or Advanced search methods, it's essential to have a clear understanding of your data structure.

In PCRecruiter, there are three primary record types: Companies, Names, and Positions. Each record type comprises structured Field data and unstructured Keyword data.

Field Data

Field Data represents the organized information within records. These are the predefined or custom fields you'll find on records, such as Company Name, City, State, Title, Email Address, and User Name. To search within field data, you select the field name from a dropdown and enter the value to search.

Field Data Searching Tips

When searching most fields, records are returned if the field *starts with* the search term entered, as a wildcard (%) is assumed at the end of the search term. For instance, searching for First Name with *rob* returns rob, robert, or robin. Here are some tips for searching field data:

Use % before a search term to find records where the field *contains* the value, rather than just starting with it.

```
Title    %Human Resources
```

You can use a comma as a separator to search for multiple values within the same field. For example, the search Human Resources,HR would return a record if the field contains either Human Resources *or* HR. Another example is searching multiple states by separating each value with a comma.

```
Title    Human Resources,HR
State    FL,GA,SC
```

You can also combine these methods to find records that contain either value within the same field. This would return records where the field *contains* Human Resources *or* HR

```
Title     %Human Resources,%HR
```

Keyword Data

Keyword data represents unstructured text information found in areas like Resumes, Attachments, Profiles, Notes, Keywords, Summary, and Job Descriptions. When searching these areas, you use Boolean operators in the Keywords search area to refine, broaden, or group search terms.

Operator	**When to Use**	**Example**
	Exact word	engineer
%	Starts with	engineer% Unlike field searching, keyword searching does not assume "starts with"
Quotes	Find a phrase	"mechanical engineer"
AND	Narrow search	"mechanical engineer" AND bsme
OR	Broaden search	"mechanical engineer" OR bsme
~	Proximity Search (Lucene)	"mechanical engineer"~4
NEAR	Proximity Search (KW2)	"mechanical NEAR6 engineer"
Parentheses	Group search terms	("mechanical engineer" OR bsme) AND (cad OR autocad OR "computer aided design" OR solidworks)
NOT	Exclude search term	“mechanical engineer” NOT NASA

Always capitalize the operators AND, OR, NEAR and NOT.

All matching keywords returned will be highlighted when viewing the content. In a resume, use the dropdown at the upper left corner of the PDF viewer to jump to the next occurrence. The currently active keyword result will be given an alternate highlight color.

Geographic Searching

When working regionally or locally, searching by location can be helpful in limiting results

City: Search the ‘City’ field for Chicago. However, keep in mind that this searches for entries starting with Chicago. To include records with suburbs or towns outside of Chicago, you can list them all such as Chicago,Schaumburg,Northbrook,Oak Park

State: Search the State field using the 2-letter abbreviation, such as OH,IN,IL

All Phone: Search the ‘All Phone’ field for 872,773,312 to find records based on area code. The All Phone field searches work, cell, and home phone fields.

Zip: Search the first digits of the Zip field to search regionally, rather than a long string of states. For example, search 2,3 to find records in the Southeast or search 33,34 for southern Florida. Click to view US Zip Code Map

Zip Code Radius Utility: You can also perform more targeted area searches using Zip Code Radius, which supports postal codes from the US, UK, Canada, Australia, and Japan. The maximum radius is 100 miles, and this option is only available in Advanced search.

Searching by Status

In PCRecruiter, the three types of records (Name, Company and Position) have a status field that can be searched using Basic or Advanced Search. For Names and Positions, this field is simply called “Status.” For Companies, it's referred to as “Default Company.” These values are saved as single-letter codes, so you must know the code for each value to search effectively. You can view the values used in your database by going to the Advanced search screen and selecting "Status" for Name and Position records, and "Default Company" for Companies.

Name Status

- **A** — On Assignment. Typically indicates that the name is associated with an active Contract Placement.
- **C** — Candidate. The default status for names, typically indicating that they are jobseekers.
- **E** — Employee. Indicates someone who works at the company the record belongs to.
- **I** — Internal. Indicates someone who works at the company the record belongs to.
- **H** — Hiring Authority. Indicates someone who works at the company the record belongs to. Often a primary client contact.
- **M** — Manager. Indicates someone who works at the company the record belongs to. Often a primary client contact.
- *O — Offer Accepted. This is a legacy Status, as the Pipeline is the correct place to designate job process status.*
- **P** — Placed. This name has been placed and is not a candidate.
- **T** — Contractor/Temp. A contract placement candidate not currently on an active assignment.
- **D** — Developed/Qualified. Sometimes used for designating Candidates that have been handled to a higher degree.
- *S — Submitted. This is a legacy Status, as the Pipeline is the correct place to designate job process status.*
- **U** — Unverified. Typically records that have been generated by the Resume Inhaler or the Job Board but which have not been manually reviewed or saved by a human.
- **X** — Not Available. Often used to indicate people who have left the company or are otherwise not to be contacted.

Position Status

- **A** — Available/Open
- **F** — Filled
- **I** — Internal Only
- **P** — Pending
- **H** — Hold

- **C** — Closed

Company Status

- **(Blank)** — Available. A generic 'container' for Name records.
- **V** — Vendor. Typically designates other agencies, software providers, etc.
- **X** — Client Company. Typically designates a company for which you are filling roles.
- **Y** — Default Company. The holding company for all un-attached jobseekers.

What Type of Search Should I Do?

PCRecruiter provides several search methods. Which method you use will depend on the complexity of your search.

1. **Quick Search** - This is a fast way to find a specific record but is limited to a set list of fields. Use it when you need to locate a specific entry quickly.
2. **Basic Search** - Basic search allows you to search up to three fields and narrow results by keywords. Use it for straightforward searches.
3. **Advanced Search** - Use Advanced Search for more complex queries. You can search more than three fields, apply comparison operators, use logical operators, search history field data, narrow results using the Zip Code Radius utility, query for records on or not on a Rollup List, and save search criteria for future use.