Introduction to Record Searching

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

Before delving into the different options for searching your database, 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, or individual fields containing values, and content data, which refers to items with broader options for searching, such as Resumes or Notes.

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. **Record Field Search** – Record Field searching will return records with specific values in the selected fields from the search. Values must be put in individually per field and then the condition criteria selected. You can also utilize filters from other record types, such as Positions or Companies.
3. **Record Content Search** – The content search can be run for all content areas at once or individually from the selected record type. This search is a broader search that utilizes Boolean Logic instead of the condition dropdown found in field searching. The All Content search can search through Resumes, Notes, Keywords, Summaries, Profiles, and Attachments.

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. Certain field types, such as status, may also have pre-defined values that populate when

clicking into the value field. These values can be searched or simply selected from the dropdown populated.

Field Data Searching Tips

There are several pre-selected search filters that automatically display from the search grid depending on the record type being searched. These fields will automatically utilize the condition of 'starts with' when values are placed here. For instance, searching for First Name with *rob* returns rob, robert, or robin. For all additional filter options you will select from the condition dropdown to determine the search behavior for that selected criteria.

The various condition options are detailed below, along with a few tips for how to structure your search queries utilizing field data.

- **Equal:** Using the 'equal' condition will only return results that are an exact match to the value placed in that field. This is helpful for restricting the results list for more targeted data.
- **Not Equal:** Using the 'not equal' condition will only return results that are not an exact match to the value placed in that field. This is helpful for filtering out specific values from the results list for more targeted data.
- **Greater Than:** Using the 'greater than' condition will return all values with a higher value than the one chosen. This is typically used for numeric fields, such as Desired Salary. (Can also be used with Alphabetic characters. This follows the behavior of A being the lowest and Z being the highest value).
- **After:** Using the 'after' condition is exclusive to date fields and will return all values with a date that is more recent than the date chosen. This is typically used for fields such as Last Activity so you can see everyone who has had an activity in the database more recently than the chosen date.
- **Less Than:** Using the 'less than' condition will return all values with a lower value than the one chosen. This is typically used for numeric fields, such as Desired Salary. (Can also be used with Alphabetic characters. This follows the behavior of A being the lowest and Z being the highest value).
- **Before:** Using the 'before' condition is exclusive to date fields and will return all values with a date that is older than the date chosen. This is typically used for fields such as Last Activity so you

can see everyone who has had an activity in the database older than a chosen date. (Helpful for database cleanup).

- **Greater Than or Equal to:** Using the 'greater than or equal to' condition will return all values with an equal or higher value than the one chosen. This is typically used for numeric fields, such as Desired Salary. (Can also be used with Alphabetic characters. This follows the behavior of A being the lowest and Z being the highest value).
- **Less Than or Equal to:** Using the 'less than or equal to' condition will return all values with an equal or lower value than the one chosen. This is typically used for numeric/date fields, such as Last Activity. (Can also be used with Alphabetic characters. This follows the behavior of A being the lowest and Z being the highest value).
- **Starts With:** Using the 'starts with' condition will return all values that start with the chosen characters in the value of the field. For instance, searching for First Name with "Rob" returns "Rob", "Robert", and "Robin".
- **Ends With:** Using the 'ends with' condition will return all values that end with the chosen characters in the value of the field. For instance, searching for First Name that ends with "ith" returns "Faith", "Keith", and "Meredith".
- **Contains:** Using the 'contains' condition will return all values that contain the chosen characters anywhere in the value of the field. For instance, searching for Title that contains "Manager" will return "Manager", "Assistant Manager", and "General Manager".

How is Boolean Logic used when searching?

Boolean operators replace the condition dropdown when searching through content, allowing users to add larger amounts of criteria at once instead of individually like you would with a field value. This is utilized when doing a Content Search.

Boolean Logic is needed when searching: Resumes, Notes, Keywords, Summaries, Profiles, and Attachments.

Lucene is NOT needed when searching: Predefined or Custom field searching or activity searching. Here you will use the condition dropdown in place of the operators.

Search Operators

An ‘operator’ is a special keyword or symbol that helps you refine and specify your search criteria, allowing you to be more precise when looking for information in your database. In Lucene, there are a variety of operators which can give you very specific and useful control. The table below is a quick reference for you and detailed explanations can be found underneath.

Operator	When to use	Example
No Operator	Match exact value	Engineer
Quotes	Match exact phrase	"Mechanical Engineer"
AND	Match all values	"Mechanical Engineer" **AND** "Master’s Degree"
OR	Match either value	"Mechanical Engineer" **OR** "Mechanical Engineering"
Comma	Match any values	"Mechanical Engineer"**,** Engineer**,** Mechanical
NOT	Exclude specific value	Manager **NOT** "Assistant Manager"
Parentheses	Group search terms	("Mechanical Engineer" **OR** "Mechanical Engineering") **AND** "Master’s Degree"
% (Wildcard)	Replaces Multiple Unknown Characters	**Manage%** = “Manager” and “Management” **“%President”** = “Senior Vice President” and “President” **“H % Manager”** = “HR Manager” and “Human Resource Manager”
? (Wildcard)	Replaces Single Unknown Character	**Manage?** = “Manager” or "Manages" but not “Management”

Operator Descriptions and Examples

Exact matching (Value Equals) is the default behavior for field searching, meaning that only records with that exact term in the selected content section will be returned. For example, searching a Resume for Manage the results will only return records containing the exact match of Manage, not Management or Manager.

While searching for exact matches can be very useful, with the variation in titles or role descriptions that can be found within a Resume, you will often want results that partially match your criteria, without having to type out manager, manage, and management all together. Using these Boolean operators allows us to search for content that doesn't exactly match the term, and to choose where and how that term is searched. There are many different symbols and terms that will be used when searching content. We'll explain them in general terms here, and how they function in specific search contexts below.

Quotation Marks: Using quotation marks around a search term ensures that the results only display content that has both terms directly next to each other and not one term or the other. This means you will need to add the phrase "Assistant Manager" in quotation marks to ensure that you do not get results with only the term Assistant or Manager.

OR, AND, NOT: These standard Boolean operators can be placed between words and phrases to create complex or simple searches.

Note: These operators must be in **ALL CAPS**

- **AND:** A content search for Sales AND Manager will return results for records who have both of those keywords. However, both terms must be located in the same section of the record (Notes, Keywords, Resumes, etc.). If the term Sales was in the resume and Manager was in the Notes, the record would not be considered a match.
- **OR:** A Content search for "Mechanical Engineer" **OR** "Mechanical Engineering" will return records with either phrase, anywhere in the content areas of the record. Additionally a comma can be used to separate multiple values acting as an OR operator between each value. Searching for Manage, Manager, Managing will return records matching any of those values.
- **NOT:** This is used to exclude a result from an AND or OR search (it cannot be applied on its own). For example, searching "Sales Product NOT Supervisor" will return results with "Sales Product Manager" or "Sales Product Director", but WILL NOT return those records for "Sales Product Supervisor". (Please be cautious with these searches as the results will filter out any content that has "Supervisor" in that specific location, so if a previous role on their resume contained "Supervisor" then it would not return those results).

Multi-Character Wildcard (%) — The multiple character wildcard will allow the user to search for partial word terms without knowing the exact spelling of the word or words. Just place a percent sign

where the words or characters may be variable or missing. You can also place multiple wildcards within the same word or phrase. Below are a few examples and use cases for this operator.

- **Manage%** will return results with both “Manager” and “Management”.
- **“%President”** will return results with both “Senior Vice President” and “President”.
- **“H % Manager”** will return results for both “HR Manager” and “Human Resource Manager”.
- **"H%R%"** will return results for "HR" and "Human Resources".
- This wildcard symbol can be replaced by multiple or no characters. This means searching for D%R will return results for “Director” but also, “Dr” or “Doctor”.
- Please note that the overuse of this operator can cause results to become too ambiguous, resulting in a slower return of results or time outs, specifically in larger databases.

Parentheses — Boolean grouping with parentheses around groups of words or phrases relates the terms to each other. This will allow users to create possible subsets of required search terms as seen here:

(“Sales Manager” OR “Product Manager”) AND Analyst

This search brings back any record that had either the phrase “Sales Manager” or “Product Manager” and also had the word Analyst.