



## intelligence Cheat Sheet: Searching from a Vacancy

Search directly from a Vacancy to find candidates that match your criteria, and add them directly to the vacancy's shortlist.

1. Basic Search from a Vacancy page 2,3,4
2. Advanced Search from a Vacancy page 5,6,7

## Basic Search from a Vacancy

1. Select the vacancy on the client screen and select the **Search for Candidates** icon (the magnifying glass)

The screenshot shows the Intelligence client interface. At the top, there's a client profile for "31 Group PLC" with contact information and a "Classifications" sidebar. Below this is a "Company Contacts" list and a "Communications" log. A search bar is visible with buttons for "Search", "Vacancies (23)", and "People (140)". A magnifying glass icon is highlighted over the "People (140)" button.

2. This will open the Candidates Search form.

The Candidate Search forms allows you to run a quick search based on keyword search on the candidates' original CV or profile (which includes employment/education history and top card information), combined with filtering by the candidates' classifications.

The Search is set to EXCLUDE placed candidates by default.

2a. Filter by classifications

2b. CV text searches

The first screenshot shows the "Candidate Search" form with "31 Group PLC" in the search bar and "IT Manager" in the "CV Search" dropdown. The second screenshot shows the "CV Search" dropdown menu open, displaying options like "Industry", "Seniority", and "Will relocate".

2a. Filter by classifications

Click on the drop-down menu to select the classification you want to filter on - you can drill-down to select any of the sub-classifications. Add as many classifications as required to search on.

Remember that you will find candidates that match ALL of the selected classifications. If you want to search for candidates that match ANY of the classifications, then it will be better to use the Advanced search option (page 10).

## Basic Search from a Vacancy (continued)

### 2b. CV text searches

**CV Search**

"mysql" AND ("php" OR "java")

Boolean searching, or searching for keywords or phrases on the candidates' original CV or profile (which includes employment/education history and top card information) follows **3 simple rules**:

1. You can use any combination of keywords – use quotation marks " " to get results with an exact match.

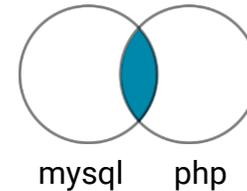
e.g. "mysql"

2. You need to link your keywords and phrases together with the operators **AND | OR | AND NOT**

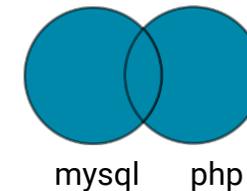
e.g. "mysql" AND "php"

3. Use parentheses ( ) to group together keywords linked with the operator OR,

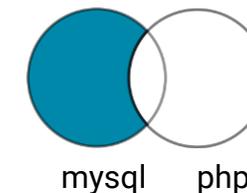
e.g. "mysql" AND ("php" OR "java") will provide results that are initially filtered to contain as least one of "php" or "java", and then further refined to include "mysql"



**The AND operator** tells the search engine to find all profiles that include both terms (in this case BOTH mysql and php)  
e.g. "mysql" AND "php"



**The OR operator** tells the search engine to find all profiles that include either of the terms, or both terms (in this case mysql , or php or mysql & php)  
e.g. "mysql" OR "php"



**The AND NOT operator** tells the search engine to exclude profiles that contain a certain term (in this case profiles containing the word php will be excluded)  
e.g. "mysql" AND NOT "php"

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## Basic Search from a Vacancy [continued]

3. Click on the SEARCH button once you've added your criteria to find candidates that match.

31 Group PLC IT Manager

>> Developers

Job Type

> IT

> Developers

CV Search

"mysql" AND "php"

Search Results

You have found 17 Candidates. Do you wish to add these to the Shortlist for this Vacancy?

Yes No

Advanced Search

**TIP:**  
You can remove all classifications by selecting the CLEAR button, or if you want to just remove one classification - just click to the left of the item and hit delete on your keyboard.

4. Your search results will show how many candidates match your criteria. Select YES if you want to add these profiles to the shortlist of your vacancy. If there are too many or too few matches, select NO and refine or broaden your search criteria further.

Candidates can only be added to a specific shortlist once. This means that if you don't find suitable candidates during your first search attempt, subsequent searches will only find new candidates that match your criteria.

**TIP:**

You can re-use previous CV searches from the same login session. This means that if you don't find suitable candidates during your first search, you can edit previous searches to expand your criteria.

"mysql" AND ("php" OR "java")

"mysql" AND "php" AND "java"

"mysql" AND "php"

5. Once you've added the matched candidates to the shortlist, you can close the form and view the shortlisted candidates by clicking on the View Shortlist button. This will take you to the candidate screen and display the candidates shortlisted on this vacancy.

Search Vacancies (23) People (140)

29 Nov 21 IT Manager

OnLine 1/1

## Advanced Search from a Vacancy

The screenshot shows the Intelligence software interface. At the top, the client profile for "31 Group PLC" is displayed, including contact information and a list of classifications. Below this, there are sections for "Company Contacts" and "Communications". A "Vacancies" panel is open, showing a list of job openings with details such as date, title, and status. A magnifying glass icon is highlighted over the "Search for Candidates" button in the vacancies panel.

1. Select the vacancy on the client screen and select the **Search for Candidates** icon (the magnifying glass). This will open the Candidate Search form, but instead of using the Basic Search – you can use the Advanced Search options that allows you to search ALL fields.

The screenshot shows the "Candidate Search" form. It includes a search bar for the client name ("31 Group PLC") and a dropdown menu for the job title ("IT Manager"). A "CV Search" section is also visible. The "Advanced Search" button is highlighted with a green box, indicating the next step in the process.

## Advanced Search from a Vacancy (continued)

2. The Advanced Candidate Search form allows you to expand your search criteria to include ANY field.

Placed Candidates are excluded by default

Filter for classifications to find candidates WITH ALL the selected classifications

Search the CV using Boolean search criteria (page 3)

UK-based consultants can search by postcode:

Full postcode + radius miles:  
e.g. BT4 2HL within 5 miles  
or  
Partial postcode (using % as wild card):  
e.g. BT4 %

The screenshot shows the 'Candidate Search' interface for '343 3I Group PLC' and 'IT Manager'. It features several sections for filtering candidates:

- Limit Search to Candidates:** Includes checkboxes for 'No Status', 'Found Job', 'Seeking work', 'Archive', 'Working for Us', and 'Placed by Us'. A note indicates 'Placed by Us' is checked by default.
- Candidate Record Search:** A text input field.
- Candidate Contact Notes:** A text input field.
- Find candidates with ALL these skills:** A dropdown menu with a 'Clear' button and a '>=' operator.
- Except for Candidates with ANY of these skills:** A dropdown menu with a 'Clear' button and a '>=' operator.
- CV =**: A text input field for Boolean search criteria.
- Address =**: A text input field.
- Perm/Temp**: A dropdown menu.
- Notes**: A text input field.
- Employer**: A text input field.
- Opening**: A text input field.
- Consultant =**: A dropdown menu.
- Job Title**: A text input field.
- Education (Comput**: A text input field.
- Status =**: A dropdown menu.
- Job Desc**: A text input field.
- Other (Courses)**: A text input field.
- Post Code =**: A text input field followed by 'within' and a 'miles' input field.
- References =**: A text input field.
- Candidates with an employer who is NOT a Client**: A checkbox.
- Candidates never contacted**: A checkbox.
- Notice**: A dropdown menu.
- And**: A connector.
- L'Contact**: A dropdown menu.
- And**: A connector.
- Min Sal**: A dropdown menu.
- And**: A connector.
- Reg Date**: A dropdown menu.
- And**: A connector.
- Available between:** Two date input fields.
- And**: A connector.
- DoB**: A dropdown menu.
- And**: A connector.
- Date of Qualifier:** Two date input fields with 'And' between them.
- Gender**: A dropdown menu.
- Email**: A text input field.
- Your Ref**: A text input field.
- Mobile**: A text input field.
- Telephone**: A text input field.
- Work**: A text input field.
- Fax**: A text input field.
- Web**: A text input field.
- Availability**: A text input field.
- Expected Salary**: A text input field.
- Data Protection**: A text input field.

EXCLUDE candidates based on the selected classifications

## Advanced Search from a Vacancy [continued]

3. Click on the CLICK TO SEARCH button to find matching candidate records.

The screenshot shows the 'Candidate Search' interface for '343 3I Group PLC'. It includes a 'Click to Search' button highlighted with a green box and an arrow. The search criteria are as follows:

- Limit Search to Candidates:**
  - No Status:  Found Job:
  - Seeking work:  Archive:
  - Working for Us:  Placed by Us:
- Find candidates with ALL these skills:**
  - Job Type: >= 0
  - > IT: >= 0
  - \*: >= 0
- Except for Candidates with ANY of these skills:**
  - > Junior: >= 0
  - \*: >= 0
- CV =** "mysql" AND ("php" OR "java")
- Address =** [ ] **Perm/Temp** [ ]
- Employer** [ ]
- Consultant =** [ ] **Job Title** [ ]
- Status =** [ ] **Job Desc** [ ]
- Post Code =** BT4 2HL within 5 miles
- Candidates with an employer who is NOT a Client**
- Candidates never contacted**
- Notice** [ ] **And** [ ] **L'Contact** > [ ] **And** < [ ]
- Min Sal** [ ] **And** [ ] **Reg Date** > [ ] **And** < [ ]
- Available between:** [ ] **And** [ ] **DoB** = [ ] **And** = [ ]

4. Your search results will show how many candidates match your criteria. Select YES if you want to add these profiles to the shortlist of your vacancy. If there are too many or too few matches, select NO and refine or broaden your search criteria further.

Candidates can only be added to a specific shortlist once. This means that if you don't find suitable candidates during your first search attempt, subsequent searches will only find new candidates that match your criteria.

5. Once you've added the matched candidates to the shortlist, you can close the form and view the shortlisted candidates by clicking on the View Shortlist button. This will take you to the candidate screen and display the candidates shortlisted on this vacancy.

The screenshot shows the search results summary bar with the following elements:

- Search** button
- Vacancies (23)** button
- People (140)** button
- OnLine** status
- 1/1** page indicator