



eFinancialCareers

how-to guide

Candidate database

Your guide to building highly targeted searches

Welcome

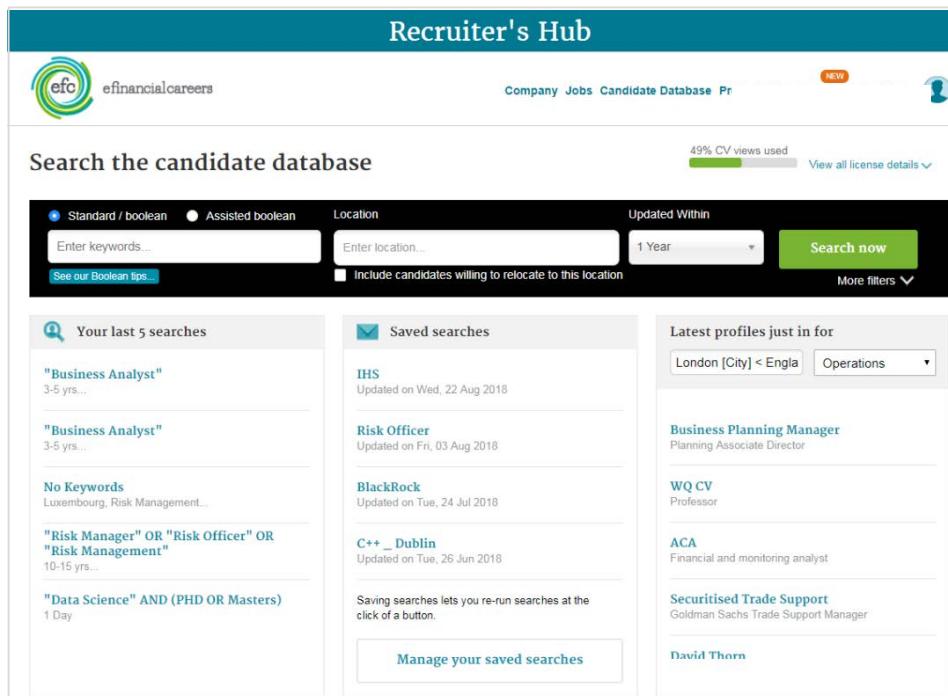
The eFinancialCareers Candidate Database puts the CVs of over 914K financial services professionals at your fingertips with an average of 50,000 new profiles worldwide added every month. It is a powerful and highly effective tool for proactively sourcing financial services talent.

Table of contents

Getting started.....	3
Advanced search options – filtering	4
Saved searches.....	5
Marked CVs.....	6
Projects	7
FAQ's	8
Contact details.....	9

Getting started

Navigating the CV search home screen



The screenshot shows the 'Recruiter's Hub' search interface. At the top, there are tabs for 'Company', 'Jobs', 'Candidate Database', and 'PR'. A progress bar indicates '49% CV views used' with a link to 'View all license details'. Below the tabs, there are search filters for 'Standard / boolean' and 'Assisted boolean', 'Location' (with a dropdown for 'Enter location...'), 'Updated Within' (set to '1 Year'), and a checkbox for 'Include candidates willing to relocate to this location'. A green 'Search now' button is prominent. To the left, a sidebar lists 'Your last 5 searches' including 'Business Analyst', 'Risk Manager', 'Data Science', and 'BlackRock'. To the right, a sidebar lists 'Saved searches' for 'IHS', 'Risk Officer', 'C++ Dublin', and 'BlackRock'. Another sidebar shows 'Latest profiles just in for' with entries like 'Business Planning Manager', 'WQ CV', 'ACA', 'Securitised Trade Support', and 'David Thorn'.



Easily repeat your last
5 searches from the
Candidate Database main
search screen

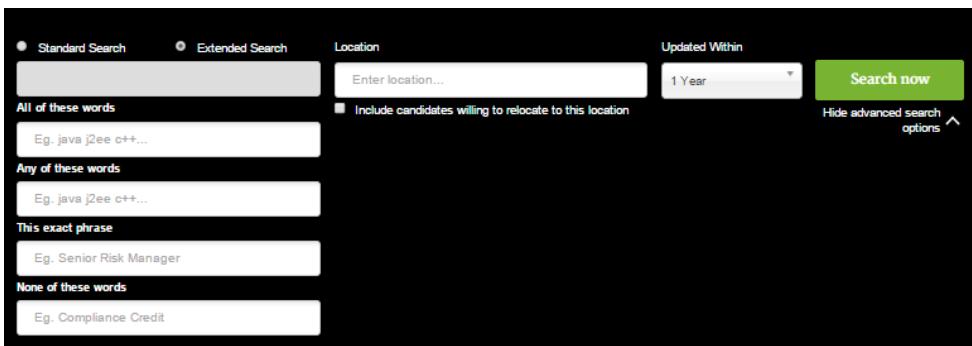
Two search options

Standard Boolean – Lets you enter in simple keyword or skills searches as well as use Boolean Search to start finding candidates

Assisted Boolean – Switching to the extended search option assists you in performing Boolean style searches without having to write complex search strings

The 'Assisted Boolean' feature

Here you are prompted to enter keywords and skills as well as phrases to include or exclude. The assisted nature of this search feature automatically generates the Boolean Search string for you.



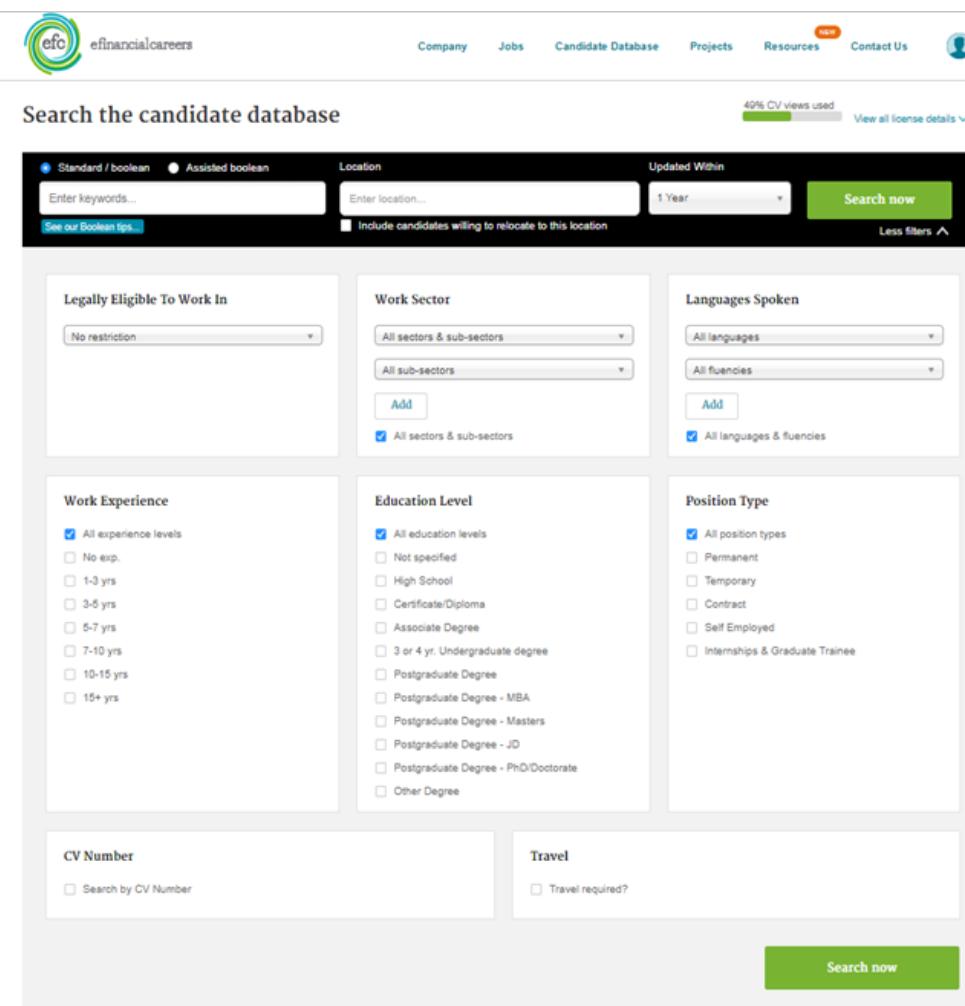
The screenshot shows the 'Assisted Boolean' search interface. It includes sections for 'Standard Search' (radio button selected) and 'Extended Search' (radio button). The 'Standard Search' section has fields for 'All of these words' (example: 'Eg. java j2ee c++...'), 'Any of these words' (example: 'Eg. java j2ee c++...'), 'This exact phrase' (example: 'Eg. Senior Risk Manager'), and 'None of these words' (example: 'Eg. Compliance Credit'). The 'Extended Search' section has fields for 'Location' (dropdown for 'Enter location...'), 'Updated Within' (dropdown for '1 Year'), and a checkbox for 'Include candidates willing to relocate to this location'. A green 'Search now' button is present. A link 'Hide advanced search options' is at the bottom right.



Quickly view the latest
CV's by location or sector
all from the main
Candidate Database
search screen

More filters

The advanced search options allow you to filter your search results by standardised fields that the candidates have completed when updating their profiles.



The screenshot shows the 'Search the candidate database' page. At the top, there are tabs for 'Company', 'Jobs', 'Candidate Database', 'Projects', 'Resources', 'Contact Us', and a user profile icon. A progress bar indicates '49% CV views used' with a link to 'View all license details'. Below the tabs are search fields for 'Standard / boolean' and 'Assisted boolean', a location search, and a date range 'Updated Within' set to '1 Year'. A checkbox 'Include candidates willing to relocate to this location' is checked. A green 'Search now' button is prominent. To the right, a callout box with a large orange double-quote icon contains the text: 'We recommend performing a simple search by entering the skills you're looking for first, then applying standard filters to narrow down the found results'.

Below the search bar are several filter sections:

- Legally Eligible To Work In:** A dropdown menu showing 'No restriction'.
- Work Sector:** A dropdown menu showing 'All sectors & sub-sectors' and 'All sub-sectors'. Buttons for 'Add' and 'All sectors & sub-sectors' are present.
- Languages Spoken:** A dropdown menu showing 'All languages' and 'All fluencies'. Buttons for 'Add' and 'All languages & fluencies' are present.
- Work Experience:** A list of checkboxes for experience levels: 'All experience levels', 'No exp.', '1-3 yrs', '3-5 yrs', '5-7 yrs', '7-10 yrs', '10-15 yrs', and '15+ yrs'.
- Education Level:** A list of checkboxes for education levels: 'All education levels', 'Not specified', 'High School', 'Certificate/Diploma', 'Associate Degree', '3 or 4 yr. Undergraduate degree', 'Postgraduate Degree', 'Postgraduate Degree - MBA', 'Postgraduate Degree - Masters', 'Postgraduate Degree - JD', 'Postgraduate Degree - PhD/Doctorate', and 'Other Degree'.
- Position Type:** A list of checkboxes for position types: 'All position types', 'Permanent', 'Temporary', 'Contract', 'Self Employed', and 'Internships & Graduate Trainee'.
- CV Number:** A checkbox for 'Search by CV Number'.
- Travel:** A checkbox for 'Travel required?'.

A large green 'Search now' button is located at the bottom right of the filter area.

Filtering by location

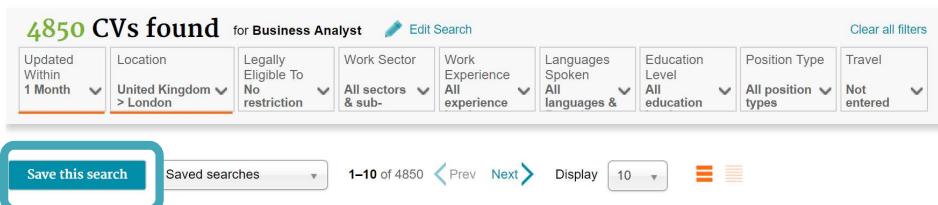
If you search for a location in your search string, you will return results that have that word anywhere in the CV. This could be somewhere they previously worked, not necessarily where they are based now.

Think of the search you create as finding information from the candidates CVs themselves; our filters allow you to make selections based on the candidates profile selections and are a far more reliable way to filter.

Our filters allow you to get around that and make your results even more relevant. Not only that, but you can choose to have the results sorted by relevance, updated time or job title.

Saved searches

Saved searches are a great way to save time and easily re-run searches that you need to use again. Once you have created your search click the 'Save this search' button, name your search and set the features as you need.

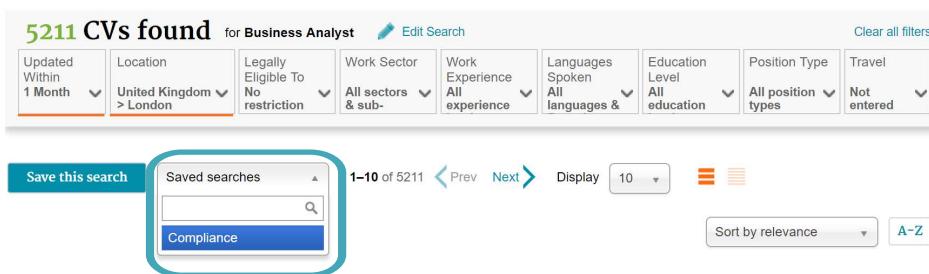


4850 CVs found for **Business Analyst** [Edit Search](#) [Clear all filters](#)

Updated Within 1 Month Location United Kingdom > London Legally Eligible To No restriction Work Sector All sectors & sub- Work Experience All experience Languages Spoken All languages & Education Level All education Position Type All position types Travel Not entered

[Save this search](#) [Saved searches](#) 1–10 of 4850 [Prev](#) [Next](#) Display 10 [☰](#)

Now every time you log in to the Candidate Database you can easily repeat this search from the 'Saved Searches' drop down.



5211 CVs found for **Business Analyst** [Edit Search](#) [Clear all filters](#)

Updated Within 1 Month Location United Kingdom > London Legally Eligible To No restriction Work Sector All sectors & sub- Work Experience All experience Languages Spoken All languages & Education Level All education Position Type All position types Travel Not entered

[Save this search](#) [Saved searches](#) 1–10 of 5211 [Prev](#) [Next](#) Display 10 [☰](#) [Sort by relevance](#) [A-Z](#)

Compliance

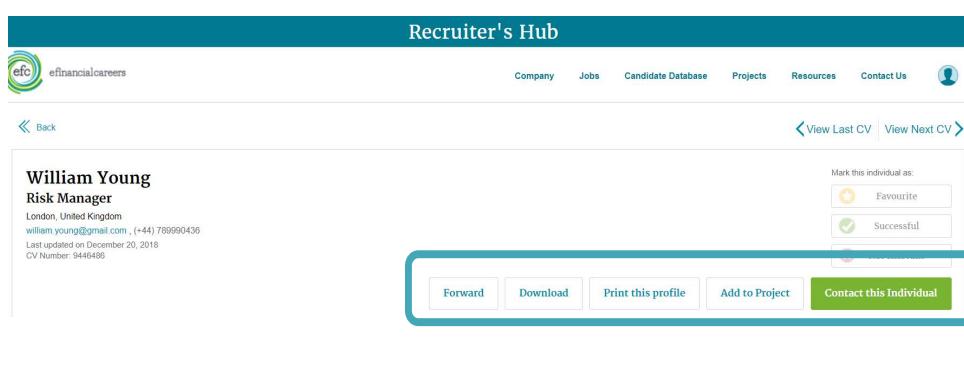
Receiving saved searches by email

You can even have your new matching profiles sent to your email address, when you save your search, just select a delivery frequency; Daily or Weekly. We'll only ever send you one email per day or per week with links to all the matching profiles, no matter how many searches you have saved.

If for any reason, you decide you want to stop the emails, just visit the 'Saved Searches' page and change the frequency to 'Never.' We'll still store your search criteria in case you ever want to use it again in the future.

Once you have found potential candidates you can:

1. Print their CV
2. Forward their profile on to a colleague
3. Download the CV to your desktop
4. Contact the candidate directly from the eFinancialCareers back office (even if they have chosen not to disclose contact information)



Recruiter's Hub

[eFinancialCareers](#) [Company](#) [Jobs](#) [Candidate Database](#) [Projects](#) [Resources](#) [Contact Us](#) [User icon](#)

[Back](#) [View Last CV](#) [View Next CV](#)

William Young
Risk Manager
London, United Kingdom
william.young@gmail.com, (+44) 789990436
Last updated on December 20, 2018
CV Number: 9446498

Mark this individual as:
 Favorite
 Successful
 Unsuccessful

[Forward](#) [Download](#) [Print this profile](#) [Add to Project](#) [Contact this Individual](#)

Search alerts

Saved search alerts

'Saved search alerts' are created by you when building search criteria in our candidate database. You can control and edit the frequency and criteria at any point from the Recruiter Office under 'Saved Searches'

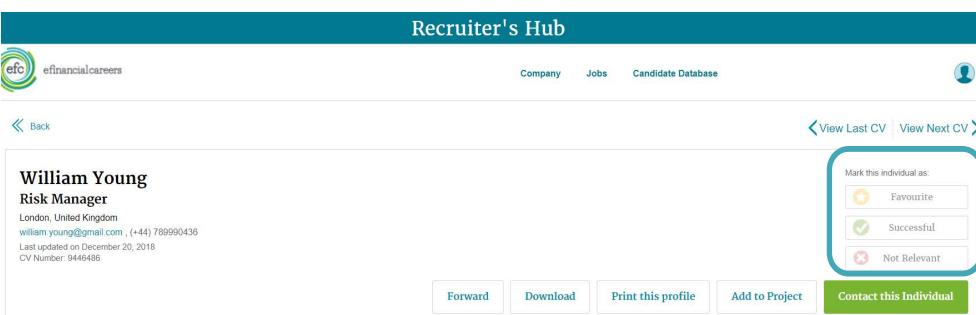
Automated candidate alerts

'Automated candidate alerts' are automatically generated by our system and send you the latest candidates matching your recent searched you've performed. You can unsubscribe anytime if you do not wish to receive these alerts.

Marked CVs

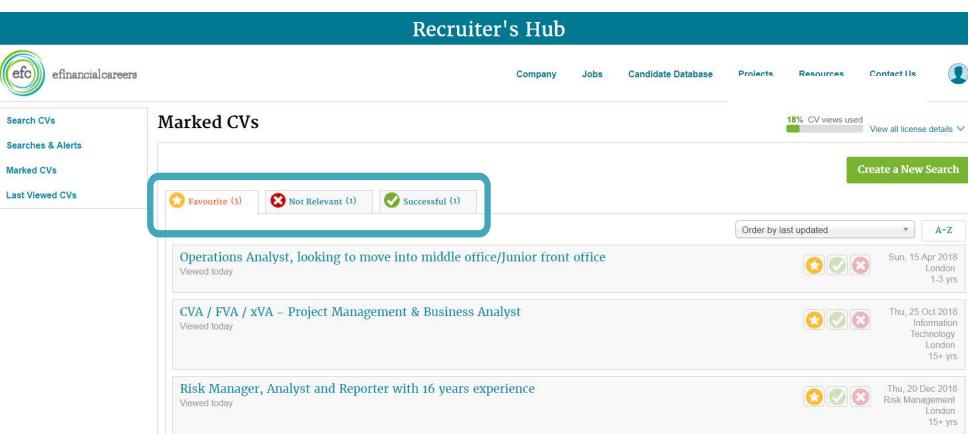
Marked CVs acts as a reminder you have already viewed a candidate's profile, and what you thought about that profile. Marking a profile also gives you the option to reconnect easily by storing them in your 'Marked CVs' tab.

Any mark that you give a candidate will always show in any future search results, immediately highlighting that you've already viewed that profile.



You can easily find all the potential candidates you've marked by navigating to the 'Marked CVs' section, there are three categories a candidate can be marked with:

- Favourite
- Not Relevant
- Successful

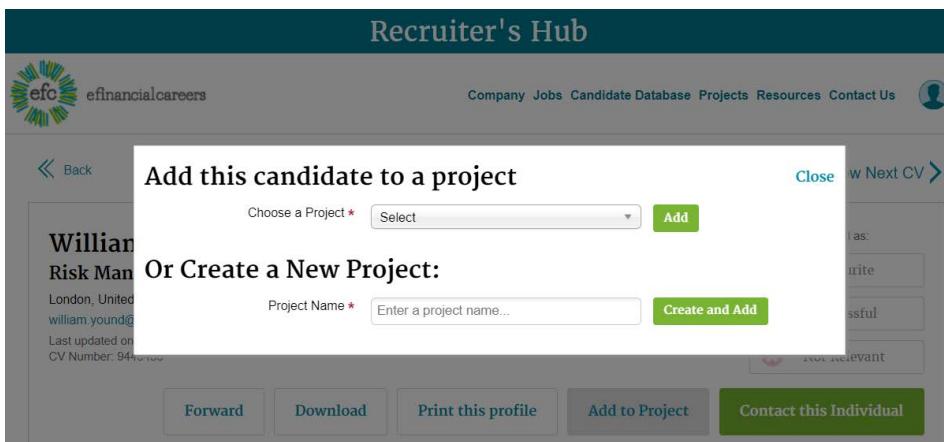


Even if you don't mark a profile, you will always be able to see when you last viewed that candidate's profile just underneath the CV title

Projects

'Projects' are essentially a folder system that allow you to manage your candidates for each role that you work.

When viewing a candidate simply click the 'Add to Project' button and either add the candidate to an existing 'Project' or create a new 'Project' if required.

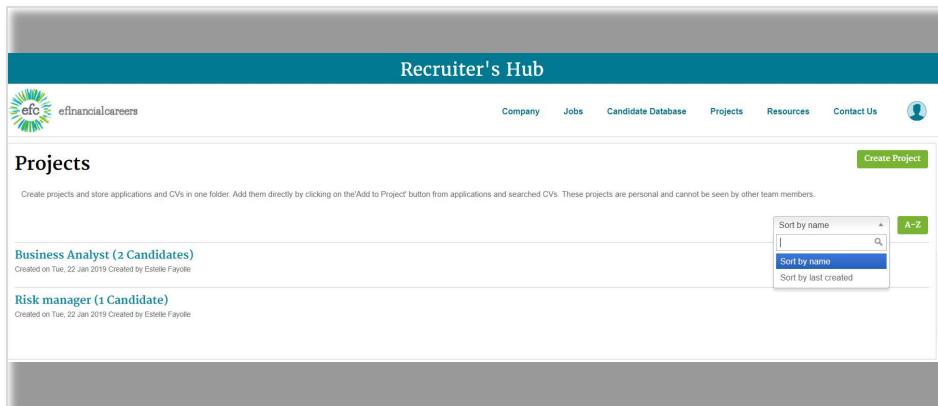


The screenshot shows a modal dialog box titled 'Add this candidate to a project'. It has a dropdown menu 'Choose a Project *' with 'Select' option, a green 'Add' button, and a sidebar with a list of projects. Below the dialog is a section for creating a new project with fields for 'Project Name *' and 'Enter a project name...', a 'Create and Add' button, and a 'NOT RELEVANT' checkbox. At the bottom are buttons for 'Forward', 'Download', 'Print this profile', 'Add to Project' (which is highlighted in green), and 'Contact this Individual'.

Once you've marked a selection of suitable candidates in your 'Project', you can navigate to projects and review all your marked candidates before deciding on the best ones to contact.



**'Projects' are personal
and cannot be seen by
other team members**



The screenshot shows the 'Projects' page of the Recruiter's Hub. It lists two projects: 'Business Analyst (2 Candidates)' and 'Risk manager (1 Candidate)'. Both entries show the creation date and user ('Created on Tue, 22 Jan 2019 Created by Estelle Fayolle'). A search bar at the top right allows sorting by name (A-Z or Z-A) and last created. Below the projects, there is a large empty area.

CV Database FAQs

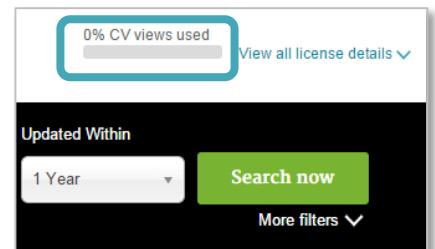
Can I use Boolean operators when searching?

Yes, our site allows you to use Boolean search, you can find our short guide to using Boolean search on our help centre here:

www.finance.efinancialcareers.com/boolean.html

How can I tell how many CV views I have left?

Check the grey bar on the top on your Search CV page. This will show you how many CV views are remaining for your CV licence.



How do CV views work?

You'll have a certain number of CV views assigned to you or a group of people. These views will re-set every month on the same day your contract began. If your contract began on the 3rd of the month, your views will re-set back to the original amount at midnight on the 2nd of the following month.

CV views are deducted for each unique CV profile that is viewed by you or anyone else assigned to your licence. You can click into the same CV as many times as you like without deducting another CV view in 30 days.

There are lots of users on my team, what happens if we two people view the same CV?

CV views are only deducted for unique CV views so even if someone else on your licence views the same CV, we will only deduct one view – the first unique view.

Do you take another view if I download the CV?

No, we only deduct from your view allowance when you have first viewed each CV. You can download, print, forward or store the CV in your 'Projects' or 'Marked CVs' tab without incurring another deduction.

How many searches can I have saved?

There is no limit to the number of CV searches you can have saved in the system, but it is a good idea to give each saved search a clear title so that you know what each one relates to and can easily find it in the future.

How many CVs can I store under "Projects" or Marked CVs?

There is no limit to the number of "Projects" you can have or the number of CVs you can store in either Projects or Marked CVs. With the Project folders, give them the name of the specific job title you are recruiting for to make your projects easier to manage.

When searching the database and clicking on a CV I can't view the CV. Instead I'm asked to contact my Sales Representative. Why is this?

This means that you don't currently have access to our database. The system allows you to search the database but in order to view your results you may need to purchase or renew your CV licence.

Please get in touch with your Account Manager for further information on the options available to you.

Support

We want to ensure you have all the help and support you need when using eFinancialCareers. So, in addition to our user guides and top tips, we also provide online training and can even come to your offices for one-to-one or group training sessions with your team.

Our dedicated Customer Success team is available during office hours Monday to Friday and can be contacted via phone or email.

Contact us

Email: help@efinancialcareers.com

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China	+86 130 5215 6026
France	+44 (0) 20 7997 7900
Germany	+49 (0) 69 6677 4600
Gulf	+971 4 433 2384
Hong Kong	+852 3702 5748
Luxembourg	+44 (0) 20 7997 7900
Singapore	+65 6579 8000
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