How do I create a candidate record?

(Import CVs & create candidate method)

There are several methods and approaches to creating new candidate records in Recruit Studio – we offer different methods depending on whether you are importing CVs at the time, or if you wish to import a CV later, or if you have run a CV search.

This help guide explains how to import a CV and create a candidate record at the same time and is one of the more widely used approaches.

1. As you receive CVs by email, save them into your 'NewCVs' folder which Recruit Studio creates in Documents (or My Documents). Do this by right-clicking on the attached CV in your email program and choose 'Save As', then navigate to 'NewCVs' and save it there.

   You may want to change the name of the CV at this stage – your company may have a naming policy already in place for CVs going into Recruit Studio.

   To rename, edit the name in the 'File name' before you click 'Save'.

2. Periodically you need to import the CVs in your 'NewCVs' folder – you might want to do this every day or a couple of times a week depending on how many CVs you receive.

   In Recruit Studio click 'Add CVs to database' on the main menu.
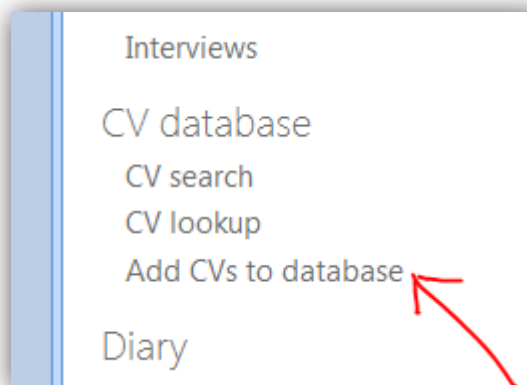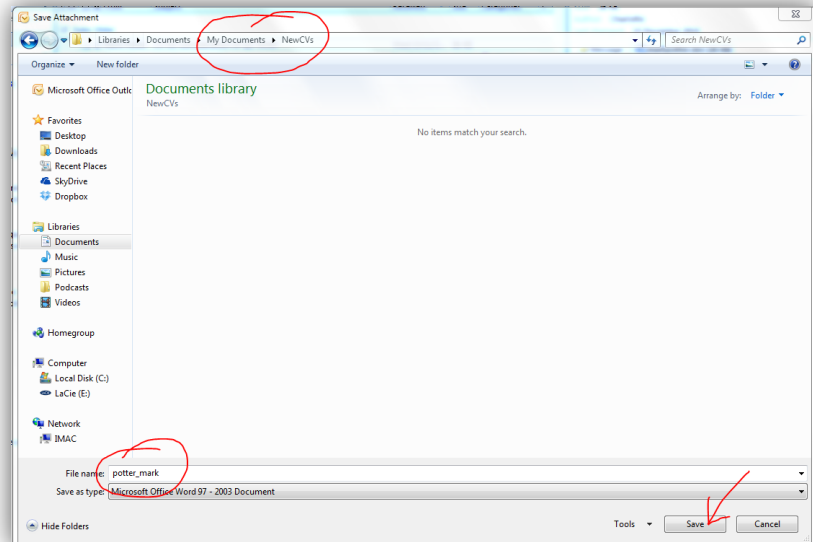
3. This screen will show you a list of all the CVs you have waiting to be imported to Recruit Studio.

You now have 2 choices – do you want to create a candidate record for one or more of these CVs, or do you just want to import the CVs to your CV database so they are searchable but are not attached to candidate records?

If you wish you can click 'Browse' to find CVs stored elsewhere on your PC or network.

4. To create a candidate record for a CV listed here, click 'Create Candidate'.
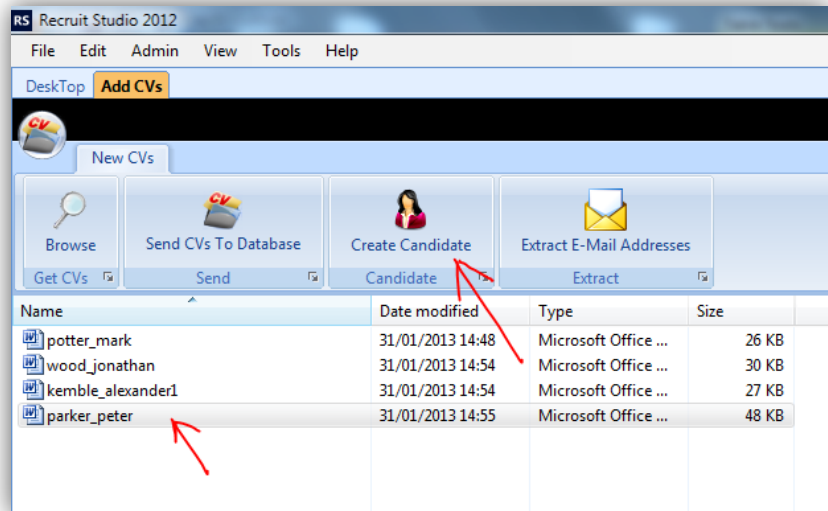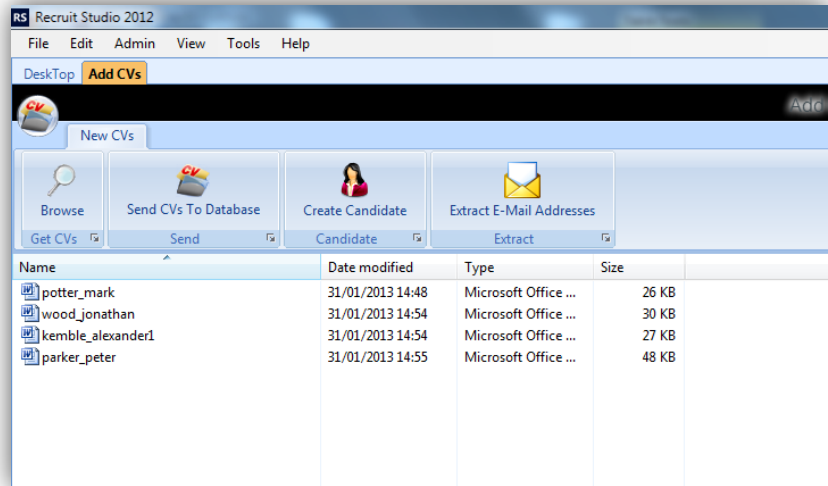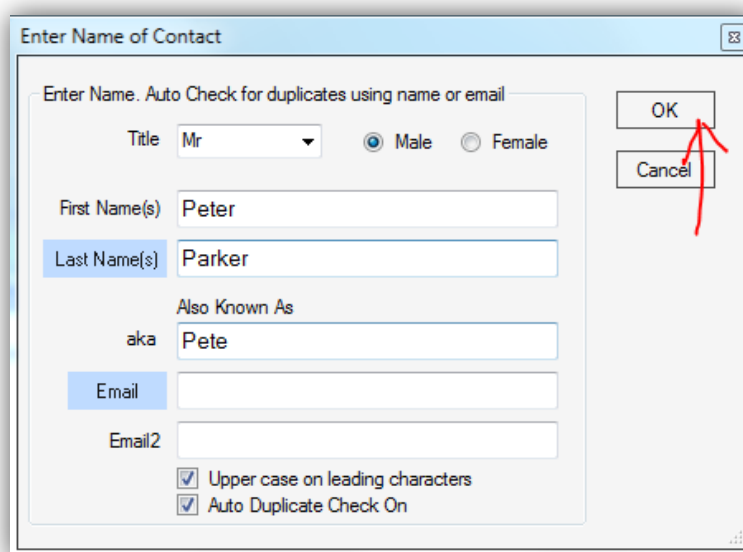
5. Confirm the CV choice in the new window, rename if necessary and click 'Open'.
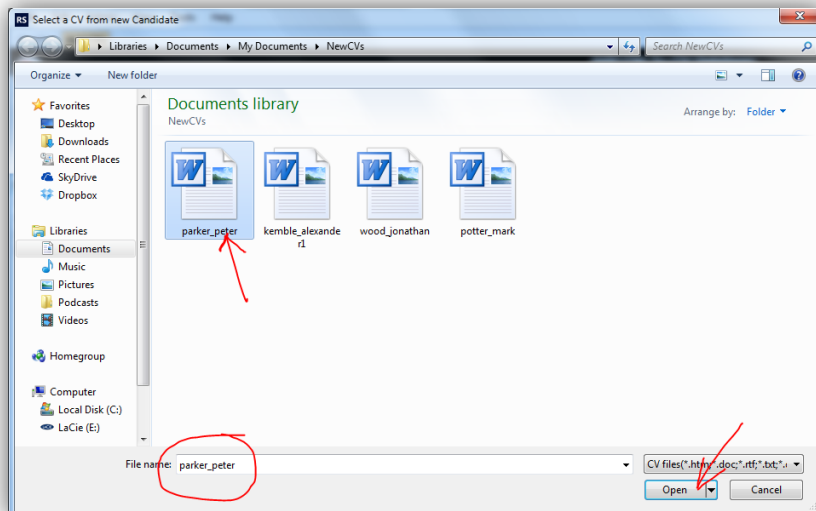

6. The new candidate record opens in Recruit Studio. Fill in the name of the candidate and any other information you can at this stage.

   Use the 'Last Name' button to check if this candidate already exists if you wish.

   Click 'Ok' when finished.

7. The CV will be imported to your CV database and the CV file copied to the 'Attachments' tab and the 'CV' tab of the candidate record. You will be able to read the CV in the preview panel on the CV tab.
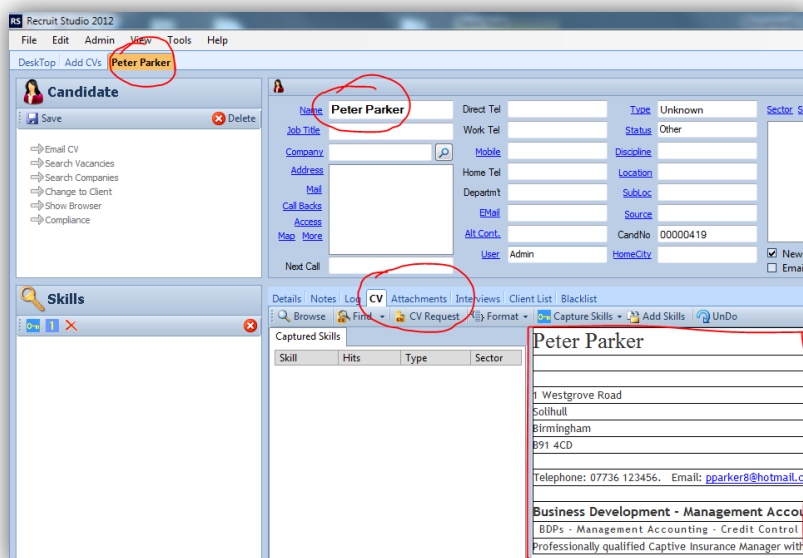
8. Use the information on the CV to populate the new record. Highlight text e.g. address, phone number, email etc.

   Then either drag and drop the data into the appropriate field, or right click and choose the relevant field from the menu.
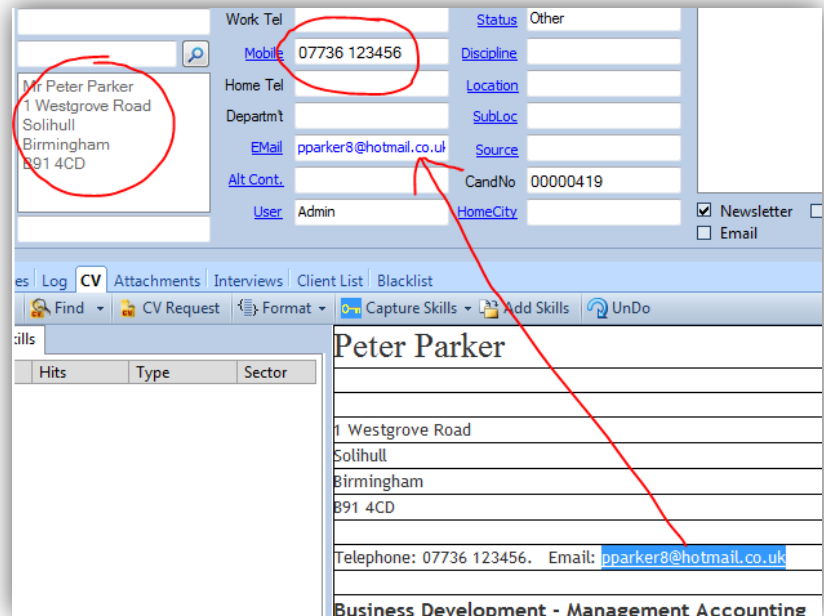
9. Continue to populate the record details such as Sector, Job Title, Discipline, Location, Source and so on.

   Where a label e.g. Location is blue, it means you can choose an option from a menu.
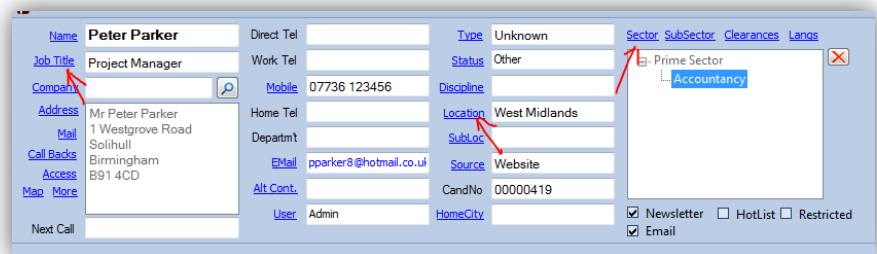
10. A fast way to add key skills to the record is to capture them from the CV content. Assuming your database has been set up with key skills in the menus you can click 'Capture skills' on the CV tab.

    This works by comparing the database's list of key skills with what the candidate has written. Any matches are recorded as key skills.

    Choose whether to capture from all skills or from a selected skill - all skills is the most popular choice.
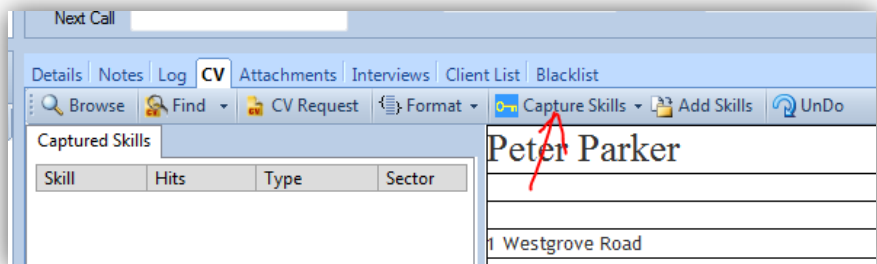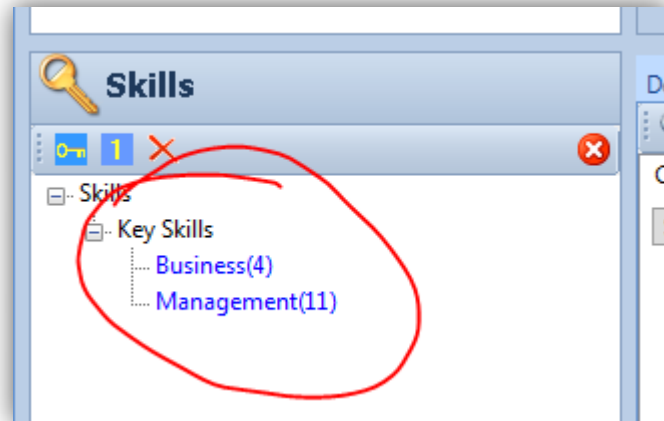
11. The results of the capture will be shown – note that the relevant skills are highlighted in blue.
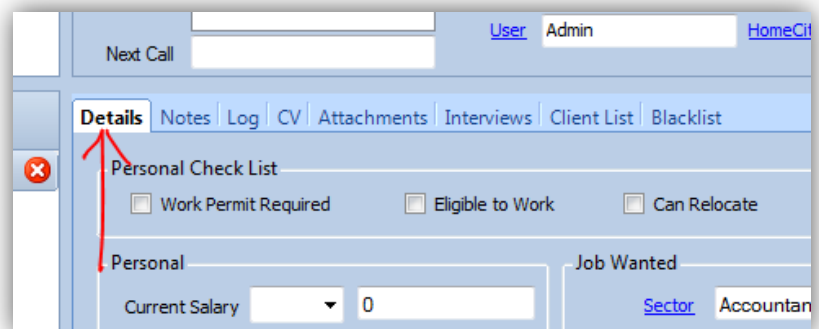
   Click 'Add skills' to confirm the selection and record them on the record.
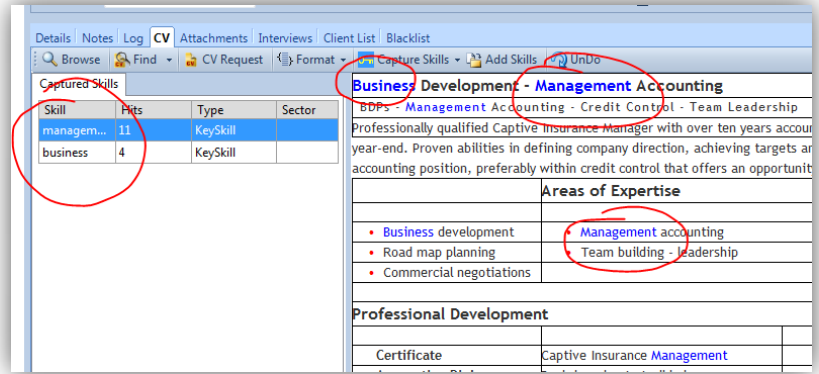
12. The key skills and their bit count are recorded.

13. When you have finished populating the general information and skills, move to the Details tab and populate that as best you can.

14. Many of these fields can be populated from menu choices (where the label is a blue button) or they are easy to fill in such as NI numbers.
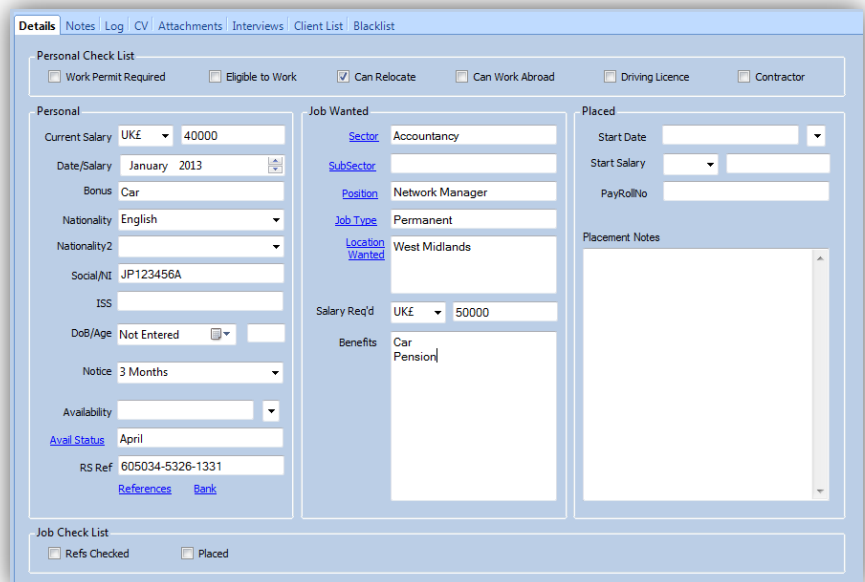
15. When you have finished populating the record, close it (and if prompted, answer 'Yes' to save the changes to the new record.
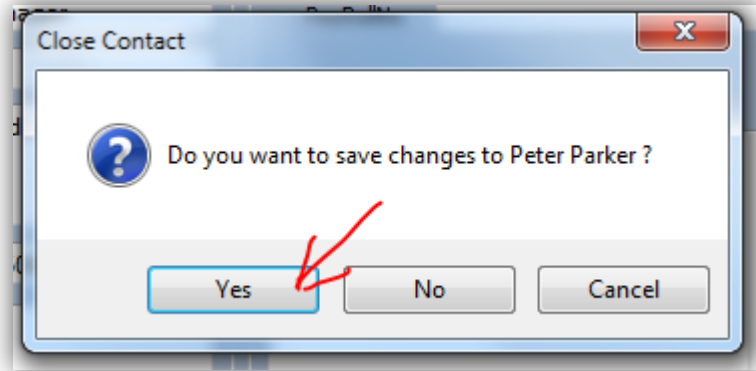
16. If you had more candidate records to create from CVs, return to 'Add CVs to Database' and create a record for the next candidate.