

## ***How do I...customise Recruit Studio (set up sectors, segments, job titles, key skills & aliases)?***

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If you are using Recruit Studio for the first time, it is well worth spending a few moments tailoring the database to your business. This tutorial will help you understand how to configure all the menus in Recruit Studio.

Make this your first task after downloading, and it will save time later on.

If you have just converted from the old version, you'll find the way that sectors, job titles and key skills are handled has changed and you'll need to make some changes.

In order to edit the menus, you need to be logged in as the Admin user. The Admin user is the default user before you add any additional users, so the likelihood is that if you have recently downloaded Recruit Studio you are logged in correctly.

Look to the bottom right of the window to check your username.

To customise the menus, go to the Admin menu along the top toolbar and choose 'Menu Tables'.

On the left is a tree, these are all the options for menus that you can edit. At the top is 'Addressing' and within this are menus for Titles, Locations, Counties and Countries. If you click on each of the labels you will see that the panel towards the right of the screen shows you what each menu currently contains.

For instance, if you click on Titles, you can see the standard options that we have included but you can easily add more.

To add a new title, simply type the word into the text box and press Return.

If you want to delete an item from the list, highlight it and click 'Delete' on your keyboard.

The next section in the tree is Sectors. Each sector in your database has its own list of segments, job titles and key skills.

To illustrate this, let's say your business deals with legal recruitment. You would need to create a new sector called law and then set the segments for all the sub-sectors such as family law, criminal law, corporate law and so on.

You can then define job titles such as Solicitor, Barrister, Trainee Solicitor etc and key skills such as LLB, 10 years experience, knowledge management and so on.

The idea behind this approach is that you can define the attributes of a candidate more efficiently so for instance if you have a candidate who is a solicitor dealing only in corporate law then you can define their sector as 'Legal', their segment as 'Intellectual Property', their job title as 'Solicitor' and their key skills as a 2:1 law degree, 15 years experience, patents, and copyright.

Let's look at how to add all of this to the database. Click on the 'Sector' button above the tree and choose 'New Sector'. Then enter the name of the new sector in the text box and press 'Return'. You may need to make the tree wider if you can't see where to enter the new sector heading.

Next, click on Segments to populate the segments that your company deals in.

Now you can move on to set up the job titles.

The next area to populate is keyskills. To do this, click on the little plus sign of your new sector and then click 'Key Skills'. Enter your list of key skills – it's well worth thinking hard about what to include here because Recruit Studio will be matching your list of skills against candidate CVs later on, so include as many skills as you can think of so ensure the best search results later.

If you have just converted to the 2008 version of Recruit Studio, you will find your job titles and key skills have been moved to the General sector. You can copy and paste these to the appropriate sectors by clicking on the General sector and then Job Titles.

Then highlight the job titles you want to take out and click 'Options' at the top of the panel and choose 'Copy selected items'. Now move to the sector which these job titles relate to and navigate to the job titles area. Click on 'options' and then 'paste items'.

Do this for key skills as well until you have all your sectors filled out.

To help maximise the probability of good search results, we've also included aliases within key skills and you would use this when there are 2 or more ways of describing the same thing. Because bear in mind that later on you will be using your list of keyskills to automatically capture skills from candidate's CVs and they may have described a skill using differently to how you would. You can also use aliases to record common spelling mistakes. This way you need never lose out on a good candidate just because they have described their experience in a different way to you.

To enter aliases, click on the individual key skill on the tree on the left and you will be presented with a blank panel to fill out.

Of course, you can now add more sectors to the list. For instance, your business may deal with engineering as well as legal.

If your business deals predominantly with just one sector you should set the default sector in the options box on the tools menu. This means that all candidates, companies, clients and vacancies will have their sector and thus segments, job titles and key skills defined as the default unless you change it on the individual record.

You should also set a default sector for each user even if you only have one sector. To do this, go to the Tools menu and choose Options then set the default sector. Do this for each user by logging in them in and setting the default.

Moving on through the tree on the left, you also have the opportunity to edit options for the status of clients, candidates and vacancies. Although we would encourage you not to alter the types of status because the terms 'active' and 'inactive' are explicit terms in Recruit Studio, you do have the option of adding more to the list.

You can also add colours to the background of a record to identify at a glance what their status is.

Let's say that we want to highlight a candidate as someone not to approach. To do this, select candidates then 'inactive' from the list and click on the options button and select 'Set Status Back Colour'. You can then choose a colour from the chart and now whenever you open a candidate who is inactive, their screen will have a red background.

The next option on the tree on the left is Types which refers to the type of contact, the type of vacancy, the source that your clients and candidates come from and the job type.

Firstly, let's look at contact types. You need to leave Candidate and Client in the list but you are free to change the rest of the list as you wish. For instance, you may want to include various suppliers as clients to your database such as your web designer or a competitor and you could define whether a candidate is a prospective candidate.

For vacancy, we have included the examples of 'one-off' and 'recurring' but you are free to change and add to these as you wish.

The source is a menu that is well worth customising because you may want to run a report on this later on.

The options already in Job Type need to be left alone but you can add to these if you wish.

Finally on the tree we have log notes. These are pre-saved options that you can select when you enter a log note for a client, candidate, company or vacancy. You might like to change these to 'Called candidate' or 'Called and left a message' or 'Received email'. Recruit Studio will populate the log itself along the way after emailing a contact or setting up an interview etc but it is useful to have extra options in the list because it will save time later.

So now we have arrived at the end of the menu options and you should now be able to :

- Edit the menu tables to tailor the package for addressing, status, types and logs
- Create new sectors and define one as the default
- Create segments within the sectors
- Create job titles for each sector
- Create key skills for each sector