

How do I set up Clearances (Database Setup)?

Clearances in Recruit Studio record, display and allow you to track any certificates, permits and licences that candidates may require in order to work. For instance a courier driver will require a driving licence to operate in that role.

Clearances are defined in Database Setup under the Admin menu and then they can be applied to candidate records by consultants.

The idea is to store all the information regarding a particular clearance, including who issued the permit, on what date and when it expires.

In this tutorial I am going to explain how to define Clearances in your database and then show you how to apply them to a record.

So let's start off by going to Database Setup on the Admin menu. Remember that you will need to be an Administrator user to do this.

Clearances are towards the end of the tree on the left. Click 'Clearances' and a new window opens.

You can see that I already have some Clearances set up already in this database. If I click on the first one – HGV – I can read a description of what it means – Heavy Goods Vehicle – and I can see which body issues the certificate and a reference if applicable.

You can store as many clearances as you need and each one of these can then be applied to a candidate record.

To add a new type of clearance, a driving licence, for example I firstly type the name of it into the box at the top. Then I click 'OK' on the keyboard and I can fill in more information such as a longer description. Then I can record who the issuing body is. And add a reference for the body if I wish. Then I can add another clearance. And so on. When I've finished I click 'OK' and close the Database Setup page.

Now if I open a candidate record, I can apply any of the clearances that apply to this candidate by clicking 'Clearances' in the top panel. I then click the 'Add clearance' button at the top of the panel and the available certificates are shown and I click on the one I want to add. This is something a consultant can do – you don't need to be an Admin user to do this part.

Once in the candidate record, I can record extra information relating to the licence such as the date it was applied for, the date it was issued, when it expires, when it is valid from and when it was last checked. There is also a notes box on this panel.

I can then go on to add more clearances for this candidate or I can close the window and the clearances are visible in the panel.

Our TempStaff module (for those of you placing temps) has several more options available for recording and tracking clearances because the placement turnaround is far quicker.

For recruiters of permanent placements, you have various options available for tracking expiring certificates and so on. If I open Search & Mailings and click on Candidates, there is a special Clearances category which contains a dozen or so criteria. This enables you to build and save searches for expiring clearances on a regular basis.

However we can also help you build a custom search to meet your tracking needs if these options don't meet your needs. If that's the case let us know what you want to achieve and we can help you.