How do I set up my database (master menus)

In this tutorial I am going to discuss the concept of sectors, disciplines, job titles and skills; and show you how to set up your master menus. This tutorial is intended for anyone who has recently started using Recruit Studio for the first time– you will hopefully find it useful whether you are a business owner or a consultant.

Setting up your database correctly at the very start of your usage of Recruit Studio is key to building a successful database. When you first download the software, the database is blank – there are no records and so it's a blank canvas.

The structure of the database is largely blank also which means you have the opportunity to customise Recruit Studio to your business. You set master menus for various menus that you will encounter on candidate, client, company and vacancy records. This helps organise your data so that searching is easy and so that data entry is quick. Whatever you add to this structure is then applied to the menus within the records.

You set up the database in Database Setup which you'll find on the Admin menu.

The tree on the left contains your master menus, but before we get into the detail of that I want to explain the overall concepts of the structure.

Your database consists of sectors, disciplines, job titles, skills and various other menus. Understanding how these menus will relate to your business is important, so let's start off by considering each one in turn.

Sectors

A sector describes the type of industry that a person or company in your database works in. You can see from my list of sectors that various industries are covered, although you might wish to have a more exhaustive or a shorter list of sectors in your database. An example would be that Shell is a company in the Oil & Gas sector. You might have a company record for Shell in your database and therefore the company sector would be recorded as Oil & Gas. Furthermore, clients and candidates in your database who currently work for Shell would also have the sector Oil & Gas in their record.

Each sector offers you the opportunity to store a list of sub-sectors within it. For instance, the Financial Services sector might contain Mortgages, Pensions, Personal Loans, Insurance, and so on, as sub-sectors. All records in Recruit Studio can have multiple sub-sectors but only one sector each.

Disciplines

A discipline describes an area of expertise that applies, typically, to a candidate or client. For instance an Accountant would have the discipline Accountancy noted in their record. It is not necessarily the same as a sector because in the real world Accountants work in all sectors, the same goes for lots of other disciplines such as IT. There is no requirement for you to use disciplines in Recruit Studio, they just provide an extra layer of definition that may not be covered by sector, job title and skills alone.

Job Titles

The job title menu quite simply allows you to store job titles. You can build up a list of generic job titles or a long list of job titles as appointed by the companies in your database. You might want to consider the ease of searching on job titles if you have a very long list of obscure titles defined by your client companies. It may be better to categorise the job titles into a smaller group.

The job titles in Recruit Studio are structured by lists. You can have as many or as few lists as you wish and you can define how to group the job titles. You may choose to group job titles by sector, or perhaps by discipline, or alphabetically and so on. There's no right and wrong, it depends entirely on how you view your market.

Using the example of the Accountant again, his job title might be Senior Taxation Accountant and you might select this from a list of Accountancy-based job titles even though he works for Shell in the Oil & Gas industry.

Skills

There are potentially two types of Skills in Recruit Studio – Key Skills and Primary Skills. By default only Key Skills are 'enabled' in your database because that's all most users require. If you wish to have another level of skill, you can enable Primary Skills which you do on the Options panel on the Tools menu.

Key Skills are the keywords that describe a candidate (or client or company's) detailed experience, training, or expertise. Key Skills are entered onto candidate records either by manually selecting them from a list, or the preferred method is to use a special tool we have to 'capture' the skills from the candidate's CV. This tool compares the words and phrases in the CV with your master list of skills, and automatically adds them to the record. This speeds up the process of populating the record.

Primary Skills are typically used to describe a candidate's main skill, this can be useful when candidate's have a particularly long or complex skill set. It helps you prioritise skills and can be useful in searching.

All skills are categorised, like job titles, into lists of your choosing. You don't have to have the same list structure for skills as job titles, and again you can have as many or as few lists as you wish.

Other menus

As you can see from the tree on the left of the screen there are various other menus available for you to set. Starting at the top we have 'Addressing' which consists of Titles, Locations, Counties and Countries. Again these can be edited as you wish. When you first download these menus are populated but you may find that the content does not fit your needs so feel free to change them.

Next on the tree we come to sectors, disciplines, job titles and skills as explained.

The next set is 'Status' and covers an individual list of statuses for each type of record in the database – clients, candidates, companies, vacancies and interviews.

Next we have 'Types'. This allows you to define the type of contact (candidate or client) with a second qualifier. Maybe you want to record that a particular candidate is not just a candidate, they are a particular type of candidate. Vacancies have their own type selection, again this menu is already populated but you can change it to suit your business. A typical choice might be permanent or contract. The 'Source' defines where the candidate or client came from, maybe an ad response or a referral for instance. This is quite a useful detail to search on, so you can find out where your candidates or clients are coming from. The job type gives you another level of description to the vacancy type. Typically it might be used to describe whether a vacancy is part time or full time, one off or recurring. The web categories menu is reserved for when you have Recruit Studio linking to your website to display your vacancies.

The next section is Notes, consisting of email notes and log notes. Email notes appear when you are sending an email in Recruit Studio and mean you can select from the menu, saving time in typing, as well as standardising your emails. The same applies for log notes, except these appear only in a record's log. You simply choose a log from the list in the record.

'Nationalities' is fairly obvious – there are two nationality fields on candidate records for you to use in Recruit Studio if you wish.

'Currencies' record the currency that a vacancy fee is in. You can enter the symbol and a country code if you wish. If you only deal with one currency, feel free to delete any alternatives that appear in your downloaded version.

'Clearances' are a special facility which allows you to define, record and track things like certificates, licences, permits and so on that a candidate must have in order to take up particular employment. There is a separate tutorial on how to manage clearances.

'Call Types' are used when setting up a scheduled call back to a person in your database. Examples might be a three month call, a CV follow up call to a client, an interview feedback call and so on.

Finally we have languages. You can record any number of languages on a candidate or client record.

Let me now show you how to edit the menus that we have defined in the tree.

With the exception of sectors, disciplines, job titles, skills and clearances, all menus are edited by clicking on the title, then the content appears in the panel on the right. To add a new item to the menu, simply type into the text box and press Enter on your keyboard and the item will be added. To remove an item from the menu, simply highlight it and then press the Delete key on your keyboard.

Sectors are slightly different. To add a sector, click the 'Add new sector' button at the top of the left hand panel and type the name into the text box and press 'ok'. The sector is straight away added to the list and you are now able to add any sub-sectors in the same way as you would for any normal menu.

Job titles, skills and disciplines are created and edited in a separate box. Click on job titles and the relevant box opens. Because job titles, skills and disciplines are organised into lists, you need to firstly create a list name and then create the entries within it. You can have as many lists as you wish. Once you've finished with job titles, move onto skills and create your lists for skills. The lists names for skills can be different to those of job titles. Skills also offer the opportunity to add aliases to each skill. This means that if you have a skill that might be described in more than one way, an acronym versus the full description, for instance, you can add aliases to the skill and Recruit Studio will automatically consider the list of aliases as well. This is particularly important for when you come to capture skills from a candidate's CV because you have to anticipate what wording candidates might use in their CV. Skills can either be individual words or they can be phrases. If you decide to enable Primary Skills in your database, they will appear as another level in the Skills tree and you can create a different set of skills to your normal Key Skills.

Disciplines are also edited in another window accessed by clicking on Disciplines in the tree. You can choose whether to organise the disciplines into lists or you can leave them as unassigned. It depends how specific you want your list of disciplines to be. Remember that you don't have to create disciplines in Recruit Studio, not all users have the need for them.

Clearances, as I mentioned earlier, are explained in a separate tutorial which you will find on our website.

Let's finally look at how all of this relates to actual records in the Recruit Studio database. You may find that it helps to see the end result and how this will work for consultants adding and editing records.

Let's use a candidate record belonging to someone who is an Accountant at the oil company Shell. You can see that I have set the sector to be Oil & Gas – bearing in mind that this might change if the candidate is placed elsewhere. The sector is not necessarily a choice that the candidate has made and is sticking to, at least in this example anyway. What is more likely to not alter is his discipline which you can see that I have set as Accountancy. This describes what this person does. His job title at Shell is Senior Taxation Accountant and we can see his list of key skills in the panel on the left. Other information from the various other menus is also recorded; here we can see the location, type, status and so on. Using a combination of all these menus I have built a comprehensive picture of this candidate and of course all of this information can be incorporated into searching.

Let's now look at a different type of candidate. Here I have a Software Developer. This is a good example of when a sector does describe their work. His job title is System Architect. His discipline is recorded as .NET Development which is chosen from within my list of Software Development disciplines. I've chosen a fairly specific discipline because a candidate working in this field is unlikely to move to another discipline easily because it is defined by his expertise. He's not likely to be looking for a job in Oracle development for instance – if he is then you could choose a more generic discipline or leave it blank. His key skills are then captured from his CV based on the appropriate list. Finally his sector, in this case, is software development because he works for a Software House. If he worked for, say, the supermarket chain Tesco as a developer then I might enter his sector as Retail. How you handle that is up to you based on how you visualise your business and market.

Let's finally look at a client record so you can see the other side of things. This particular client works in the HR department of Shell, the oil company. So although her discipline is HR, her sector is recorded as that of the company show works for, so Oil & Gas. Her job title is chosen from a list of HR job titles and you have the option to add skills to a client – you can if you wish. In this case I have not.

I hope the description of the database setup is clear and helps you to understand the different view points that you can adopt in setting up the structure of your Recruit Studio database. Remember that this is best done early on in your usage of the software and most of all I would recommend that you think clearly through your options before you embark on creating the records in Recruit Studio.