First steps for new users

Welcome to Recruit Studio. This tutorial is intended for anyone who is new to Recruit Studio and I will show you the basics so you get an understanding of the concepts and tools available to you.

There are lots of video tutorials available on our website and after you watch this one you might like to take a look at some of other topics within the Getting Started series.

Let's start by looking at the sort of information that you store in Recruit Studio.

At its most basic level, Recruit Studio is a place for you to store details on companies, clients, vacancies, candidates and CVs. You can treat it as a giant, shared address book but it is designed to do so much more.

Recruit Studio is organised into sectors such as Engineering, IT, Education and so on. You choose what these sectors are and you can have as many or as few as you wish.

You can then customise each sector to have its own segments or disciplines within a sector such as mechanical engineering within the Engineering sector or Food & Drink within the Retail sector. Then you can create a list of job titles and key skills for each sector. Doing this early on will mean that entering data is quicker and you get better search results.

There are many tools available such as emailing, searching, reporting and mailshotting as well as actions and events such as shortlisting, interviews, placements and the diary.

We will look at each of these in turn and what they are for but let's start with the fundamental data.

There are two databases in Recruit Studio – the contacts and the CVs.

The contacts are the companies, clients, vacancies and candidates whose information you need to store.

And the CVs are the CVs you receive by email or download from job boards. The CVs are stored together, usually organised by the month that they were imported. You can search them, edit them, attach them to candidate records and send them out to your clients.

Unlike lots of other recruitment software packages, you don't need any candidate records to keep CVs in Recruit Studio. You can run searches on them separately and that's why there are two databases.

It saves you time in that you don't need to make records for candidates until you want to shortlist them for vacancies. You don't even need to do anything to the CVs to be able to search on them beyond import them because Recruit Studio searches on the words contained in the documents like a Google search.

Let's now look at the contacts in more detail.

The contacts are the candidates, companies and clients and their vacancies.
Candidates are straight forward. You can save all sorts of information on them and attach files such as CVs to their record.

Clients are more complex in that they usually belong to a company and they have vacancies attached to them. If you look at it like this, clients fall in the middle:

COMPANIES > CLIENTS > VACANCIES

A client is an employee of a company and a vacancy belongs to a client. An example would be that Bill Gates (the client) works for Microsoft (which is the company) and Bill Gates has a vacancy for a Software Developer.

So in terms of entering data to Recruit Studio, you should create a company record followed by the client records and then create a vacancy belonging to a client. You can do all of this within the company record and you can treat the company record as an overview of everything that is happening at the company. For instance, it will show you all the clients and candidates who work at the company and an overview of all the current vacancies and interviews. A tutorial is available to show you in detail how to do this.

So once you have entered some data into Recruit Studio you can start using the tools that are available.

There are lots of tools to help you such as emailing which can be used for sending an email to a specific client or candidate or you can email a CV to a client or you can email lots of clients and candidates in a mailshot.

A lot of emphasis is placed on searching within Recruit Studio, of which there are two types: CV searching which is a free text search based on the words contained in the CVs and a search called 'Search & Mailings' which searches the contacts database.

Here you can find candidates, clients, companies and vacancies by all sorts of criteria. It's a very useful tool as it can be used to run simple searches to find all the nurses in the database for instance, or you can run complex searches for something very specific.

Other tools include the diary which provides a shared appointments diary alongside phone call reminders and tasks.

There is also a suite of reporting functions available, as well as tools for recruiters of temps. For example you can search for temps based on their availability and skills as well as produce weekly time sheets to help with your accounts.

Recruit Studio also helps you to contact the people in your database by email, or SMS text message and integrates with Microsoft Word to do mail merges.

All of these tools are designed to bring about action. Events that are handled in the database include shortlisting candidates for vacancies or vice versa, arranging interviews and making placements.

So, first steps for new users should be as follows:

1. Customise Recruit Studio to your business in terms of setting up sectors, segments, job titles and key skills.
2. Enter the CVs and create records on companies, clients, vacancies and candidates if you wish.
3. Learn how to do the basic functions such as emailing, searching and arranging interviews.
4. Next use the reporting and productivity tools to drive your business forward.

You should now start to learn about Recruit Studio in more detail by watching the tutorials on navigating Recruit Studio followed by customising the database.