Getting started with navigating Recruit Studio

Welcome to 'Getting started with navigating Recruit Studio'. This tutorial is aimed at new users wanting to become familiar with the interface and basic functions.

Let's start by taking a look at the layout.

When you first open Recruit Studio you will see a blue screen with a menu on the right. The blue screen is called the Desktop and is the base layer, like the top of a desk and serves as a surface for your work. The desktop is similar to your Windows desktop except that instead of having icons for programs you can store icons for client and candidate records, CVs, companies, vacancies, web links, maps and all sorts of other files.

When you open a record, it will appear on the desktop. You can open as many records as you wish and they are each placed on top of one another. Because records and screens open on top of the desktop, it is often hidden but it is still there underneath everything that is open. You can use the tabs at the top to choose which screen to bring to the surface.

You can store all sorts of files on your Recruit Studio desktop. To place a contact on the desktop you can simply drag it into position. If you locate a candidate in the database using the right hand panel, you can drag a shortcut of the record onto the desktop for use later.

If you right-click on the desktop, you will find various options available. For instance you can change the colour of the desktop and text. You can remove items from the desktop or browse for files. You can also copy items to your colleague's desktops and you can create reminder notes for yourself or other people.

Towards the right of the screen is the main menu. This is where all your day-to-day functions can be found. The main menu panel never leaves the screen, although the view will change depending on what you are doing.

You can always navigate back to the main menu by clicking the main menu button at the bottom of the screen.

The main menu is divided into different sections. At the top are listings. You can click 'My Candidates' to view a list of all your candidates for instance. The next section lets you create new records. Next we have report listings where you can do a Search & Mailings search, view your Sales Calls, CVs pending, Placements or Interviews. The next section in the list concerns the CV database. Here you can do a CV search, look up a CV in the database, and import CVs. Next are the diary tools. This section lets you view your appointments diary, call backs and tasks.

At the end of the main menu are five blue buttons which will always remain, even if the view on the main menu changes. The first four blue buttons let you look up records in the database. For instance if you want to open the record for a specific client whose name you know, you can do that here. The final button labelled 'Main Menu' lets you return to the main menu at any point.

At the very top of the screen is the main toolbar with various menus. It may be worth spending a few moments familiarising yourself with the menu so you know what it contains.

In developing Recruit Studio we have adopted the Microsoft pale blue colours to make the system feel fresh after using it all day. You can however change the colours if you wish. From the View menu, choose ‘Visual styles’ and you then have a choice of three themes.

Along the very bottom of the screen is a horizontal toolbar. Here there are various buttons, many of which are duplicates of the day-to-day functions in case the main menu is not visible when you need to use them.

From the left these include, the Today page which is an overall view combining your diary, call backs and tasks as well as a summary of contacts or vacancies that you have added or edited today. Next along the toolbar is Today’s Items which lets you re-open the records of contacts that you have edited today. ‘Reminders’ shows you a general list of clients and candidates who you need to call. The next icon along the toolbar is ‘Find ID’ which helps you to locate records based on the unique reference number which is useful if you advertise vacancies by reference number for instance. Moving on, there are buttons for creating new clients, candidates and companies as well as a Quick Entry button for fast candidate entry. Next there is a Diary button which opens the diary tools, a button for CV search, SMS texting and finally the Help button.

Underneath the horizontal toolbar is the status bar where you can see the latest update over on the left, the name of your company (if you have entered it) and next to that is the word ‘Database’. If you hover your mouse here you can see a summary of the records held in the database. Over towards the right you can see which user you are currently logged in as and the version number.

You may now like to watch the next in the series of getting started tutorials such as Customising Recruit Studio.