Record Layout

Screen Configurations · https://learning.pcrecruiter.net/site/docs/screen-config/layout-configuration/

One of the key ways to improve your PCRecruiter workflow is to configure your Name, Company, Position, and Placement record layouts to display record information in a layout specifically suited to your needs. This allows you to:

- Standardize information by requiring fields or pre-filling values
- Hide unused fields
- Relabel standard fields
- Group fields into logical containers
- Access custom fields you have created in the database more easily
- Add viewing panels for notes, activities, or interviews to your front screen
- Create multiple tabs to segment fields by use case

Customize Record Layouts

1. Open any record of the type you wish to Customize (Company, Name, Position or Placement only).
2. Click the 'Customize' option, found in the 'Action' menu at the top of the record. If you do not see this option, which is represented by a 'gear' icon, your database administrator will need to enable the Customize Layout option in the Security settings on your User Record.

Tabs

By default, a screen layout consists of a single page. You can choose to create additional 'tabs' within your Name, Company, and Position records to keep less-often used fields on an alternate screen, or to group fields and functions by task or use case.

To create an additional tab within your layout, click the large **+** next to the 'Default' option in the bar at the top of the screen. To rename or remove tabs, use the **Manage Tabs** option in the Action menu.

Options

- **Columns**: Specify the number of columns you would like in your layout. We recommend 3 as a minimum, but if you have a wider monitor you may have room for more.
- **Social Networking**: Show/Hide the social network sidebar on your layout.
- *Options: (This dropdown is deprecated and has no effect.)*
- **Custom JavaScript**: Expand this panel to add functionality via custom code supplied by PCRecruiter representatives.

Special Action Menu Items

When configuring Name records, the Action menu at the top of the customization screen includes a **Configure Status** option. Use this menu to hide any unused Status field options when viewing Names.

When configuring Position records, the Action menu at the top of the customization screen includes a **Configure Job Sharing** option. This allows you to show/hide options in the 'Share' icon that appears next to the Job Title field (used in conjunction with the Job Board module).

Editing the Layout

Groups are the blocks that will contain individual fields. Grouping fields allows you to organize fields on the screen into logical arrangements, such as keeping Contact fields in one place and Salary or Education fields in another.

- Click **Add Group** to create a new Group.
  - Regular Group: Select this to insert a standard block of fields. Give the group a name and click **Done** to create it.
  - Shortcut: Select this to insert an expandable frame within the page to preview other areas of the record such as Attachments, Resume, Notes, Interviews, Keywords, etc. without switching to that area of the record. Click **Done** to add a Shortcut.
  - Horizontal Splitter: This option ONLY appears within the Placement customization screens. It inserts a horizontal divider which can be labeled (e.g. "Billing Information", "Placement Details", etc.) to sub-divide the Placement screen.

- After adding a Group:
  - If you have added a Shortcut, it will be appended to the end of your screen layout. From there you can choose what element that Shortcut should display.
  - If you have added a Regular Group, you can adjust the fields that it contains.

- Adjust the Fields within a Regular Group:
  - Use the ‘Click to set field’ option at the bottom of any Group to view a dropdown of all available predefined and custom fields. You may also type characters into the dropdown box to jump to specific fields rather than scrolling.
  - You may drag and drop fields within a Group or between Groups to arrange them as you wish.
  - To remove a field, click the field's name and choose the Delete Field link. This does not remove the field from your database - it merely takes it off of your screen layout.
  - Click the mini-menu at the right of each field to:
    - Alter its label in your layout. This changes the name for a Standard Field within this screen (no other screens in PCRecruiter will show this change). Custom Field names cannot be changed here.
    - Make the field Read Only. "On Add" means the field is read-only while creating a new record. "On Edit" means the field is only read-only after the record has been saved for the first time.
    - Give it a Default Value. This sets the value which the field will be filled in with when creating a new record. *Note: System fields like '*Status*' or '*Show on Web*' may have specific values that are different than what the user sees. Check with a support representative if you're having difficulty with a Default Value working as expected.*
    - Require the field. This prevents the user from saving the record if the field is empty.

- Use the Move or Trash icons at the top of any Group to rearrange its position or remove it from the layout.
- Click on the Group's title to re-name the Group.

When your layout adjustments have been made, use the **Save** option in the Action menu to apply your edits.

Move / Copy Record Button

Typically records are moved or copied to a database en masse via a Rollup when performing data cleanup projects, but there may be cases where records need to be moved between industry-specific databases or per-office databases within a single PCRecruiter account. This can be facilitated by adding a 'Copy' or 'Move' button into the user's Name screen.

In order to copy or move records between databases, your Username and Password must be the same in both the source and target databases.

NOTE: The *Company* to which the name belongs, including any activity logs, custom fields, etc. will also be copied into the target database.

Use the **One Click Setup** link next to **Move/Copy to Other Database/User** at the top of the page to open the Single Click Setup panel. Within this panel you'll find these options:

- Default Target Database: Select the database that your Move/Copy should send the record to.
- Move/Copy: Setting this to MOVE will delete the record from the current database after duplicating it in the target. COPY will leave the source record intact.
- Duplicate Checking: Define criteria for determining if the record already exists in the target database.
- Rollup List: Select a Rollup List in the target database to associate this record with. (Optional)
- Source Label: If completed, this value will be saved in a custom field called 'Candidate Referral Source' on the moved/copied record in the target database.
- Resume: Define whether, if the record exists in the target database, the resume should be replaced by the one from the copy.
- Username: Define whether the record should retain the original Username value when copied, or if it should be given the Username of the person doing the move/copy.
- *Copy to User(s): This is a deprecated feature.*

Having configured the 'One Click Setup', you can now place the "Copy Record" button into your screen layout.

The **Predefined: Move Database** option appears as one of the selectable choices in the dropdown of fields you can add to a group. This item will insert a "Copy Record Now" button into the layout rather than inserting an input. The item will be labeled "Transfer To: [database name]". When clicked,

it will move or copy the current record as defined in your settings.