Settings

Database Configuration · https://learnpcr.pcrecruiter.net/site/docs/database-config/settings/

Settings can be found by clicking the gear icon in the lower left corner of the main menu bar. Below are the different areas of the Settings Menu and their specific functions.

- **Users (Requires Admin Permissions)**
  - **Manage Users:** Allows Admin to Add users to the Database. Can also Modify Users, Set Security, Set Preferences, Configure Phone Settings, and *Copy User Settings* *(Coming Soon!)*.

- **Presentations (Requires Presentation Security)**
  - **Candidate Presentation Templates:** Allows the user to add, edit, or delete Presentation Templates. (Presentations Security).
  - **Candidate Presentation Overall List:** Shows a View of all Presentations that have been sent in the database. (Presentation Overall List Security).

- **Form letters: (Requires Form Letters Security)**
  - Allows the user to create, edit, or delete Form Letters in the database. These are split into each type of Form Letter.

- **Custom Fields: (Requires Custom Fields Security)**
  - Allows the user to create, edit, or delete Custom Fields in the database. These are split into category by Record Type.

- **Database Setup**:
  - **Codes: (Requires Keywords/System Tables Permission)**
    - These are broken down by category, such as skill or education codes.

- These codes allow the user to assign specific Keywords to records throughout the database. Using consistent keywords to label and identify records will make it easier to locate them later, regardless of the words used in the resume, notes, or other non-conforming content.
- **Activity Types: (Requires Keywords/System Tables Permission)**
  - Allows the user to add, edit, or delete Custom Activities.
- **Pipeline Setup: (Requires Admin Permissions)**
  - Allows the user to add, edit, or delete Pipeline Templates.
- **Titles (Requires Keywords/System Tables Permission)**
  - Used to create a standardized set of Titles to be applied to Name Records and/or Position Records. While these are typically filled in with manually entered values, some users find it helpful to create a predefined list to pick from for more consistent data.
- **Departments (Requires Keywords/System Tables Permission)**
  - Sets predefined values for the Departments field on Position records. This can help the user differentiate between multiple positions with the same title if they lie within different departments for the same Company. Also helpful for internal hiring. (Example: I have 2 "project manager" Roles for the same Company but one is for IT and the other is for Marketing.)
- **EEOC Source: (Requires Keywords/System Tables Permission)**
  - Used to create a standardized Source List designed for tagging name records with their referring source. This table is also used for EEO Candidate Self Identification.
- *History Fields (Legacy Feature)*
- **Profile Setup: (Requires Create/Update Profiles Permission)**
  - Allows the user to create, edit, or delete Profiles.
- *Placement Profiles (Legacy Feature)*
- *Feedback Forms (Legacy Feature)*
- *Rollup Lists (Legacy Feature)*
- *Activity: (Legacy Feature)*

- *Organization Details (Legacy Feature)*
- **oAuth Connection Settings: (Requires Synchronization Permissions)**
  - Allows the user to utilize the Google Sync function and QuickBooks. (QuickBooks also Requires Data Transfer Permissions)
- **Automations: (Requires Admin Permissions)**
  - Allows the user to add, edit, or delete Automations in the database.

- **Email setup:**
  - **Email Signature:** User Email Signature Setup.
  - **Email alias:** Allows the user to Send Emails from the database.
  - **Email opt-in/opt-out:** Email Opt-In/Opt-Out list stores addresses or domains that have been Opted In or Out of certain mail categories/emails. **(Requires Admin Permissions)**
  - **Private Email:** Adding email addresses to the Private Email list will prevent Activities being written for any emails related to these addresses. **(Requires Private Email Permissions)**
  - **Outgoing Mail Settings:** Allows authentication for email notifications that come 'from the system' rather than a specific user. **(Requires Admin Permissions)**
  - **Default Email Font:** Default Font allows users to set a base font to be applied to the 'body' of outgoing emails.
  - **Stationery Setup:** In some cases, you may wish to create a complete 'template' for your blank emails rather than simply appending a signature.
  - **Bulk Mail categories:** Allows Admin to choose which Mail Categories are available to recipients when selecting an Opt-Out link from an email. **(Requires Admin Permissions)**
  - **Campaign Job Category Setup:** Allows Admin to set Categories for Email Campaigns; these can be used for Analytics filtering. **(Requires Admin Permissions)**

- **Data Management:**
  - **Logging options:** Allows Admin to monitor user login attempts and their corresponding IP addresses. **(Requires Admin Permissions)**

- **Identify Inactive Records:** Adds all Records with Activities older than a specified date to a Rollup List. This is helpful for database cleanup and maintenance.
- **Recycling Bin:** Shows previously deleted records from the database.
- **About PCR:** Gives information for current software version and amount of Data Storage being used.

- **Global Change:** Used to make Multi-Record Changes in the database. Please reach out to Support for assistance with this. **(Requires Admin Permissions)**

- **Database Maintenance: (Requires Admin Permissions)** This area is not typically used by the user; reach out to Support for more information.
  - *Update Database* ***(Do Not Use)***
  - **Intranet IP Restriction:** Restricts access to the database limited by the IP Addresses listed. If your IP is not on this list, permission will be denied regardless of system administrator status.
  - *Email upgrade utility* ***(Do Not Use)***
  - *Connection Settings* ***(Do Not Use)***
  - **Security Settings:** Allows Admin to set Whitelisted or Restricted IP Addresses for database login. Can also set up password restrictions and expiration.
  - **Global Timeout:** Sets the Database Timeout length.
  - **Encryption Security:** Sets IP addresses to view Hashed/Encrypted fields.
  - **Server Image Store:** Allows users to link to an image vs. browsing to upload from your computer.
  - *SQL Workbench* ***(Do Not Use)***

- **Region: (Requires Admin Permissions)**
  - **Time Offset:** Specifies the default time zone for the database.
  - **International Settings:** Configure formatting for fields and displays based on location.

- **Add ons: (Requires Admin Permissions)** This area is not typically used by the user; reach out to Support for more information.
  - *Install Feature **(Do Not Use)***
  - *SMS opt-in List: Shows Names and Phone numbers that have Opted In to receive a bulk SMS. (Coming Soon!)*
  - *Serial Number **(Do Not Use)***

- **API (Requires Admin Permissions)** This area is not typically used by the user; reach out to Support for more information.
  - **API Settings:** Shows API Database id
  - *3rd Party API Keys (Legacy Feature)*
  - **Oauth & API Access:** Shows current Oauth and API connections. You can revoke access to the connections here.
  - *Social Network Settings (Legacy Feature)*