PRINT CV

MANUAL

OTYS Recruiting Technology

CONTENT

1 | INTRODUCTION

1.1 ABOUT PRINT CV

If you want to propose a candidate to a client, you can do this with the candidate's original CV or with a fixed format for your organisation (the 'commercial CV'). From within OTYS Go! it is possible to easily generate CVs directly from the candidate detail page. You can either take the original candidate CV as a starting point or create a commercial CV based on the details in the database. We call this function the 'Print CV'. This makes it easy to propose candidates to your clients in a professional manner.

1.2 PURPOSE OF THIS MANUAL

In this manual we explain how to generate a print CV from a candidate detail page. We will show you how to do this based on the candidate's original CV and based on a commercial CV. For the commercial CV, key users can determine which details should be contained using print templates. All other users can then select a print template created by a key user when preparing a commercial CV.

1.3 STRUCTURE OF MANUAL

This manual starts with an introduction chapter that explains the added value of Print CV in OTYS Go!. It then discusses the features.

A distinction is made between:
- Management of print templates by key users
- The use of Print CV by all users

2 | MANAGE PRINT TEMPLATES

2.1 ACCESS TO PRINT TEMPLATES

Key users can make print templates for creating a commercial CV. The print template determines which fields will be part of the commercial CV.

A key user can manage these print templates with the following steps:
1. In the top right corner of OTYS Go!, click on your name and then select 'Client settings'.
2. Look for 'docx' in the keyword filter on the right side of the screen.
3. Open the setting 'Print templates - Print templates Print CV (docx)'.

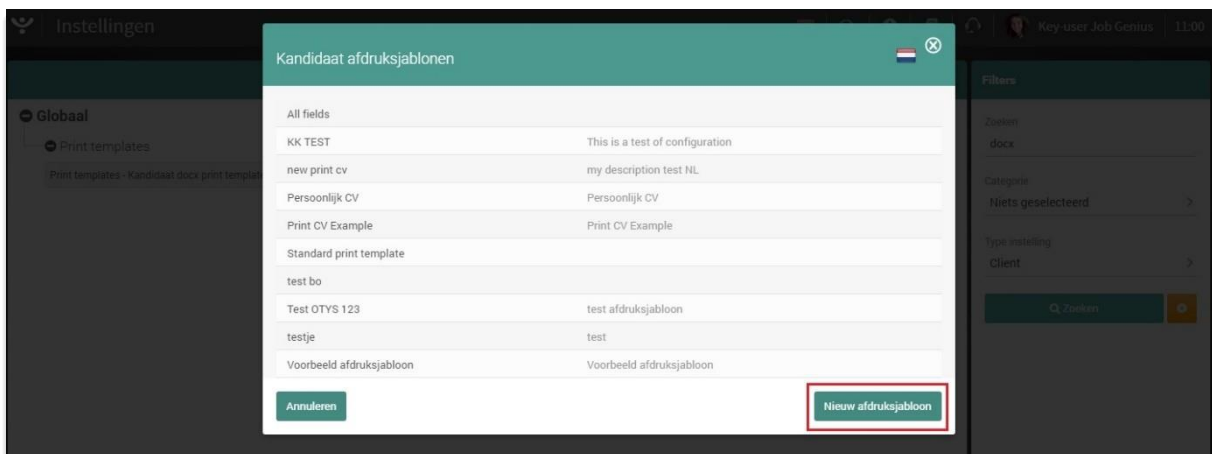A list opens with the existing print templates and the option to create a new print template.

Fig. 1 – Manage and create print templates

2.2 CREATE NEW PRINT TEMPLATE

To create a new print template, click on the 'New print template' button on the bottom right of the list of print templates.

A window opens where you can enter a name and a description for the print template. Click 'Save' at the bottom right to add the new print template. The print template has been created and you will return to the list in which you will find the created print template.

You will then need to add fields to the print template. You can read how to do this in the section below.
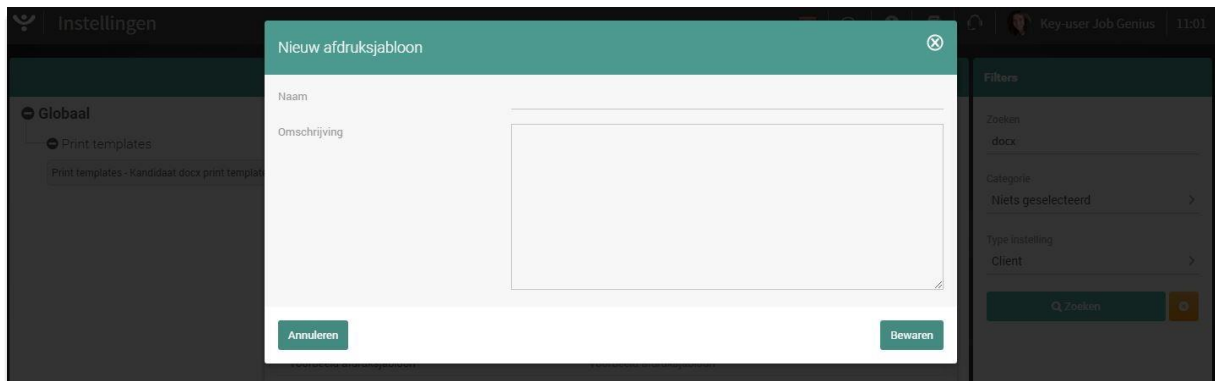
Fig. 2 – Enter data in a print template

2.3 EDIT PRINT TEMPLATE

To edit an existing print template, click on a print template in the list of print templates to open it. A new window opens with details of the print template.

At the top of the window you will see the name and description of the mailing list. You can edit this and click on 'Save' in the bottom right to save these changes.

At the bottom of the window you see the fields that are part of the print template:

- By clicking the 'New field' button you can add a new field to the print template. A new window opens with the following fields:
  - Under 'Type' you can select the type of field you want to add. Here you can select 'Block' for blocks with information (such as work experiences), 'Document structure' for items in the document structure (such as a horizontal line) or 'Field' for specific fields (such as the candidate's first name).
  - Under 'Field', select the field you want to add.
  - In some situations you can enter additional information (depending on the field). For example, if you selected 'Document structure' under 'Type' and selected 'Text' under 'Field' you can enter the desired text below it.
  - Finally click on 'Save' to add the field.
- To edit an existing field, click the field that you want to edit to open it. A similar window opens as the window that is shown when adding a new field. You can make your changes in this field and click on 'Save' to save them.
- To delete an existing field, click on the field to open it. In the window that follows, click on the 'Delete' button and confirm this action.
- To change the order of the fields you can simply 'drag' a field to the desired position.

Once you have finished your changes, click on the 'Save' button at the bottom right of the window.
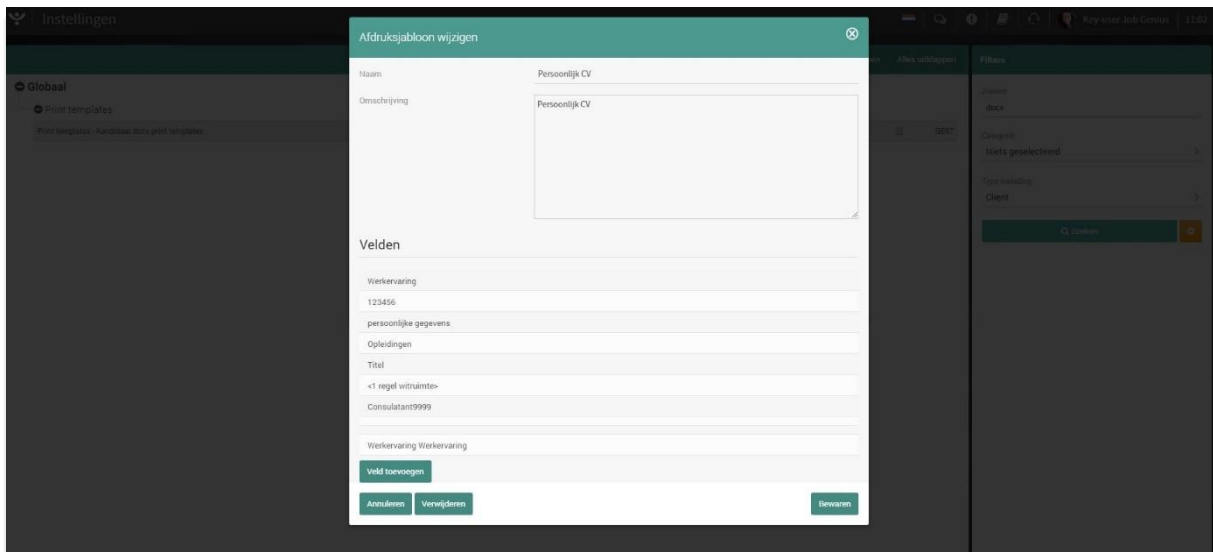

Fig. 3 – Edit an existing print template

2.4 DELETE PRINT TEMPLATE

To delete an existing print template, click on a print template in the list of print templates to open it. In the window that follows, click the 'Delete' button at the bottom left and confirm this action.
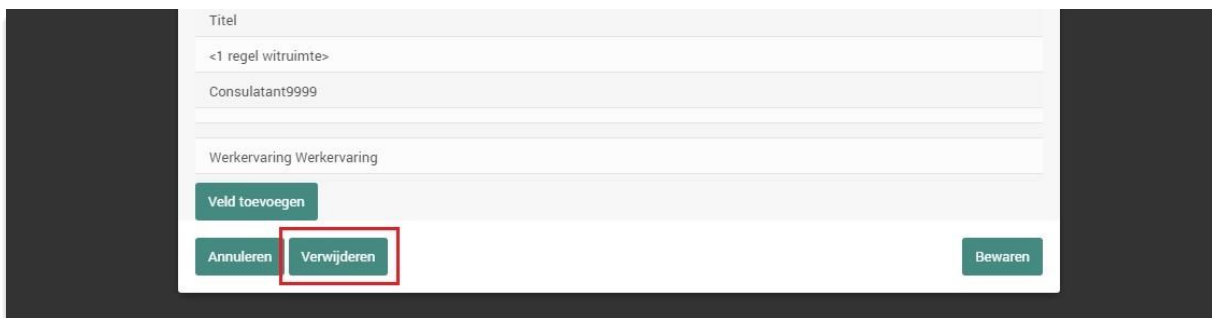

Fig. 4 – Delete a print template

3 | GENERATE PRINT CV

3.1 GENERATE COMMERCIAL CV

You can generate a commercial CV (based on the fields of a candidate in your database) with the following steps:

1. Open the Candidate Module.
2. Find and open the candidate for whom you want to generate a commercial CV.
3. Click on the 'Proposal' button at the top of the candidate detail and then select 'Print CV'.
4. A window opens where you can specify the following:
    - Print template
      Here you select the print template configured by a key user (see Chapter 2). In addition to the print templates configured by key users, you also have two additional print templates at your disposal: 'Europass' (this is a CV according to the European 'Europass' format) and 'OTYS standard' (this is a CV based on a format developed by OTYS).
    - Format
      Here you indicate whether you want to export the CV in Word, PDF or Google Docs format. In Section 3.2 we tell you more about generating CVs in Google Docs format.
    - Output
      Here you indicate the output of the document.
        - If you choose 'Open document', a document is generated.
        - If you choose 'Email', the document will be placed in an email.
    - Language
      If you have created a print template in multiple languages, select the language in which the CV needs to be generated here. Note that this only determines the language of the print template and not the contents of the CV that comes from the database (such as the work experience).
    - Website
      Here you select the website from which you want to propose the candidate. If several websites are linked to your OTYS system (each with its own 'identity'), you can propose the candidate from the desired identity.
    - Cover page
      If a cover page has been configured in the print template you selected, you can use this option to determine whether or not a cover page should be generated.
    - With photo
      If a photo of the candidate is included in the print template you selected, you can use this option to determine whether or not a photo should be generated.
    - Without contact details
      If specific contact details are included in the print template you can use this option to determine whether or not this contact information should be included.

5. Then click on the 'Print' button at the bottom right of your screen.

If you have selected the 'Open document' option, the document will be downloaded. If you have opted for 'Email', an email will open containing the candidate's CV.
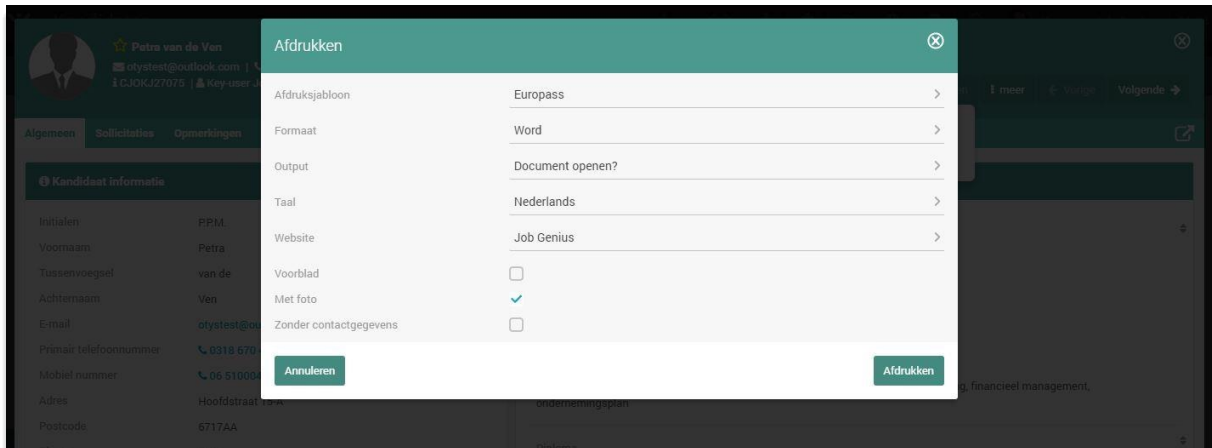

Fig. 5 – Generate print CV from the Candidate Module

3.2 EDIT COMMERCIAL CV WITH GOOGLE DOCS

If you opted for 'Google Docs' as the output method when generating a commercial CV (see Section 1.1), a new tab will open within a few seconds after generating the CV. In this tab the resume is shown in the Google Docs environment. This allows you to make changes to the commercial CV directly from your browser, without having to open and re-save it. This allows you to edit the candidate's CV specifically for this vacancy (e.g. by emphasising certain activities).

Once you have finished making these changes, close the Google Docs tab so you return to your OTYS Go! system. In this window you can indicate whether you want to create a PDF or Word document from the edited CV. Once you have made this choice, the edited file is generated.

If you do not have a 'Google Docs' option or if it does not work correctly, this means the Google Docs integration in your system is not (properly) configured. Consult our 'Google Docs in Go!' manual for more information.
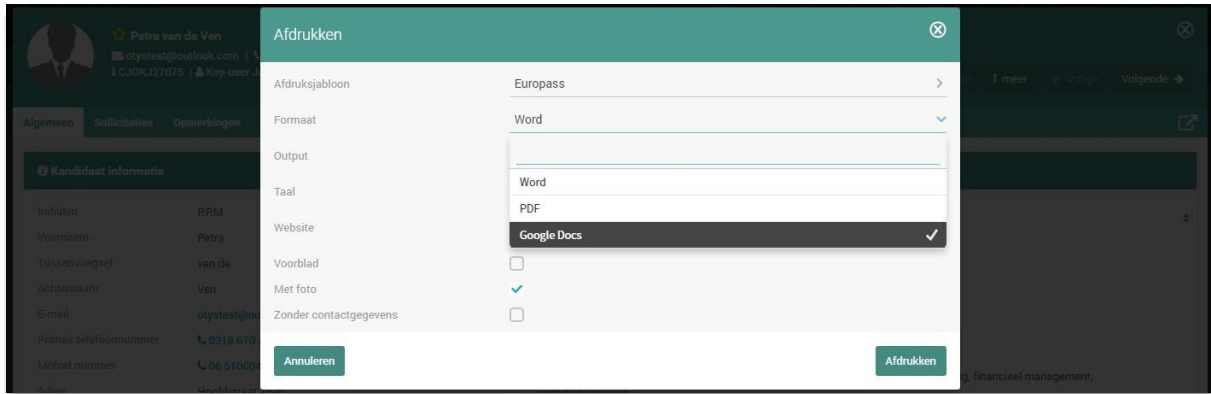
Fig. 6 – Set up Google Docs as the output method

3.3 GENERATE ORIGINAL CV

You can propose a candidate based on their original CV with the following steps:

1. Open the Candidate Module.
2. Find and open the candidate for whom you want to generate a commercial CV.
3. Click on the 'Propose' button at the top of the candidate detail page and then select 'Original CV'.
4. A window opens with the documents from the candidate's file. The most recent CV is selected by default. If you would like to propose a candidate based on a document other than the most recent CV document known to the system, select the relevant file.
5. Click on 'Process' in the bottom right corner.
6. The candidate's original CV opens in a new tab in the Google Docs environment in seconds. Make the changes you want to make in the original CV. Once you have finished making these changes, close the Google Docs tab so you return to your OTYS Go! system.
7. In this window you can indicate whether you want to create a PDF or Word document from the edited CV. You can then click on the 'Download file' button at the bottom right if you want to download the edited file or on 'Generate email' if you want to place the customised file in an (empty) email so you can send it immediately.

If you do not have an 'Original CV' option or if it does not work correctly, then the Google Docs integration in your system is not (properly) configured. Consult our 'Google Docs in Go!' manual for more information.

Fig. 7 – Generate original CV