



# BASIC OPERATIONS

## INSTRUCTION MANUAL



OTYS Recruiting Technology





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# 1 | INTRODUCTION

## 1.1 ABOUT OTYS GO!

In September 2014 a new generation of OTYS software was launched: OTYS Phoenix. OTYS Phoenix was OTYS' new platform-independent software solution that replaced the OTYS back office. When launching a completely new version, certain things go right and other things go wrong. That is why a dedicated development team has been working throughout 2016 on the development of a new version of this product: OTYS Go!

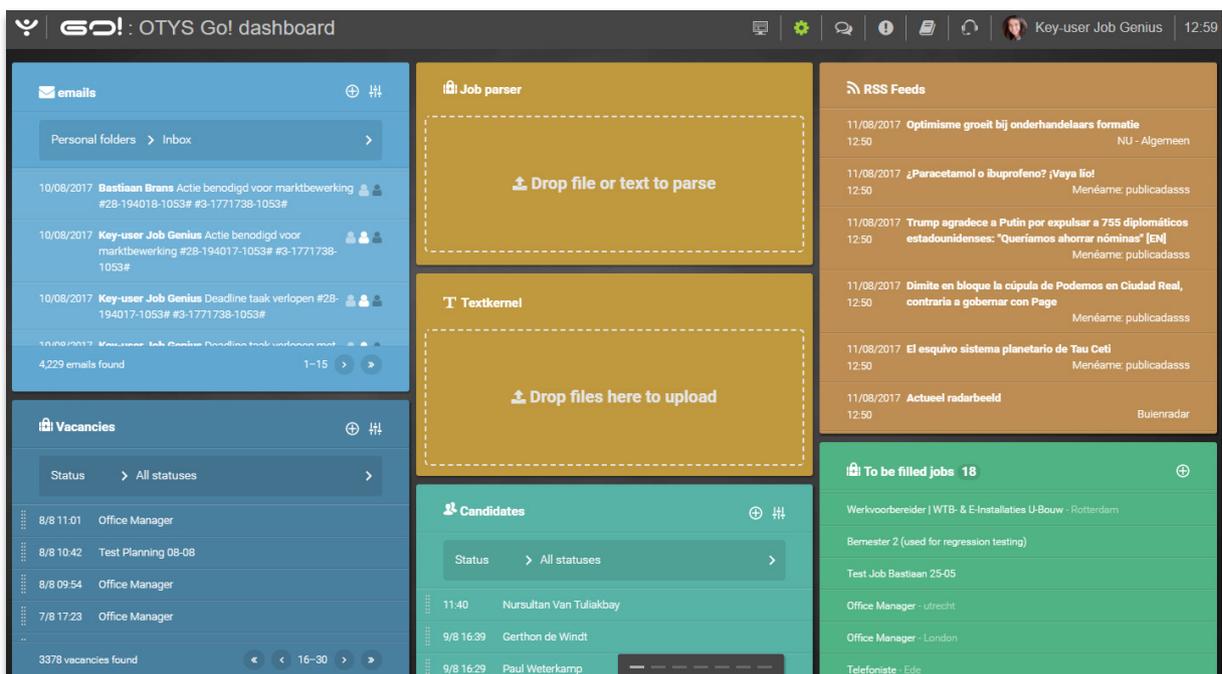


Fig. 1 - Welcome to OTYS Go!

In developing OTYS Go! the focus was on a number of aspects:

- **Speed**  
Speed is obviously of great interest to our users. Each OTYS Go! module is a stand-alone application. Therefore OTYS Go! modules load a lot faster.
- **Overview**  
In Go! we decided to return to the list views as they were in the back office (of course displayed in a modern way), and to use the full screen for detailed views.
- **Usability**  
For example; when creating filters, dragging emails and displaying certain fields (dates, phone numbers and email addresses).
- **Flexibility**  
For example; columns displayed in list views or the way in which a user can create a detailed view exactly so that the data that are important to them are presented logically.

- Steering data

In Go! we opted for reports that are easy to create, flexible to (further) configure, real-time (an assignment from 10 seconds ago shows up in the report immediately), and clickable.

It is possible to use the current OTYS back office and OTYS Go! simultaneously. While one colleague might still use the OTYS back office, another colleague can work in OTYS Go! because both use the same database. It is even possible for a user to be logged into the OTYS back office and into Go! at the same time.

## 1.2 INSTRUCTION OBJECTIVE

These instructions are intended for OTYS customers, to enable them to carry out the basic operations in OTYS Go! For example logging in, switching between modules and other general aspects. Additional manuals are available for specific actions and specific modules.

## 1.3 INSTRUCTION STRUCTURE

After this introductory chapter, we will explain several useful basic operations in OTYS Go!

## 2 | BASIC OPERATIONS OTYS GO!

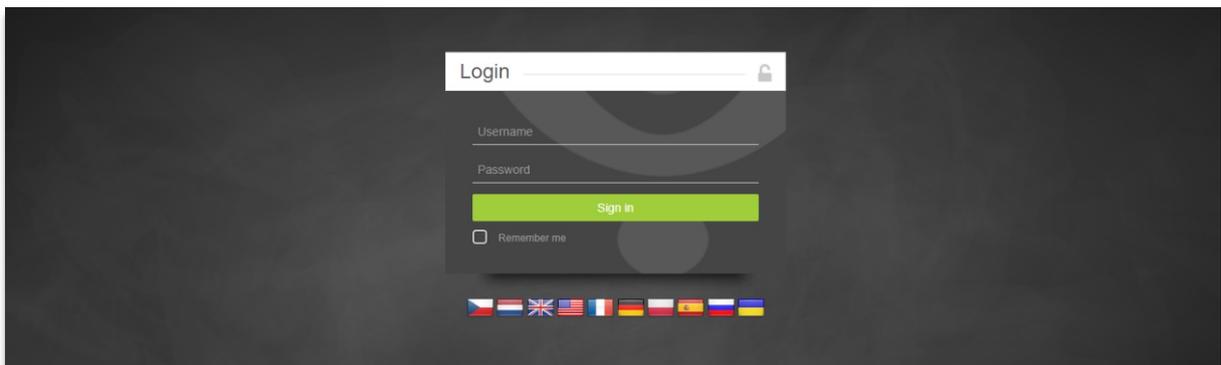
### 2.1 INTRODUCTION

In this chapter we will show you several useful basic operations in OTYS Go! This chapter is divided into the following sections:

- Introduction
- Login
- Switch modules
- Basic module setup
- Change profile
- Change preferences
- Logout

### 2.2 LOGIN

You received a URL for logging into OTYS Go! This URL is specific to your organisation and can be used by all users of your OTYS system. However, the URL cannot be used by other OTYS customers.



*Fig. 2 – Login window OTYS Go!*

You can open this URL with a web browser such as Chrome, Firefox and Internet Explorer. As OTYS Go! uses a technique (AngularJS) that loads the application in your browser we recommend using Google Chrome. This browser is generally known as the fastest browser that handles the loaded data best/fastest (most websites will therefore load faster in Chrome than in other browsers).

After opening the URL a login screen appears. Here users can log in with their existing OTYS login information. By ticking 'Keep me logged in', you will be automatically logged in (even after closing your browser), until you log out. So be careful with ticking this option on a computer that others have access to.

For security reasons, you will be prompted to periodically change your password. Depending on the preferences of your organisation, you will need to change your password every month, every two months, every six months or every year. If this period lapses, a window in which you must enter your

old password and your new password (twice) opens after logging into OTYS Go! After your password has been changed you will be able to log in with your new password.

## 2.3 SWITCHING MODULES

After logging into OTYS Go! you will automatically be redirected to your dashboard. As a user you are able to customise the dashboard. Read more on how to do this in the instruction manual 'Dashboard module'.

The OTYS system consists of several modules. For example, there is a module to manage your candidates, a module to manage your vacancies and a module to manage your calendar.

The following modules are currently available in OTYS Go!:

- Dashboard
- Email
- Calendar
- Reminders
- Candidates
- Vacancies
- CRM
- Procedures
- Activities
- Sales
- Tasks
- Assignments
- Timesheet
- Billing
- Underutilisation list
- Reports
- CMS
- Newsletters
- UTS Manager
- Blog
- RSS
- SMS
- Live chat
- Interactions
- Workflows
- Support

It is possible that you do not have all of these modules at your disposal. Some users of an organisation can access certain modules, based on their authorisation. In addition, not all of our customers use the Billing module, for example. If you do not have access to a module that is of interest to you, please contact us. We are happy to give you more information about the relevant module.

To open a module, click on the OTYS logo in the top left corner of OTYS Go! A list with the modules that you have access to will appear. Clicking on the module opens the corresponding module.



Fig. 3 – OTYS logo in OTYS Go!

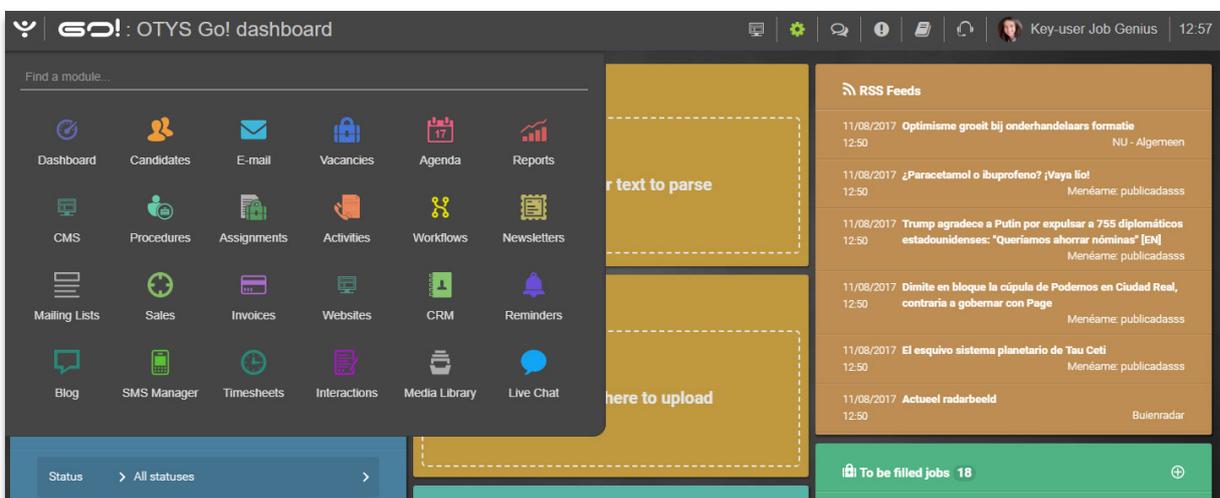


Fig. 4 – List of modules in OTYS Go!

When you click on the OTYS logo you will immediately see a cursor flashing next to 'Find a module...'. You could also enter the name of the module you want to open. Next, you can open the module by clicking it or by pressing enter.

The modules on the list are automatically sorted according to your OTYS use. After using OTYS Go! for only a day the sequence of used modules may not be as you would prefer it (it depends, after all, very much on which modules you used that day). You will notice, however, that the more often you use the system, the more frequently used modules will appear at the top of the list.

Modules open by default in the same tab. By holding down the CTRL key and clicking on a module, most browsers will open the module in a new tab. If you want a module to always open in a new tab, you can set this in your user settings via the setting '[module name] - Open module in new tab'. More information on these user settings can be found in section 2.6.

## 2.4 BASIC MODULE SETUP

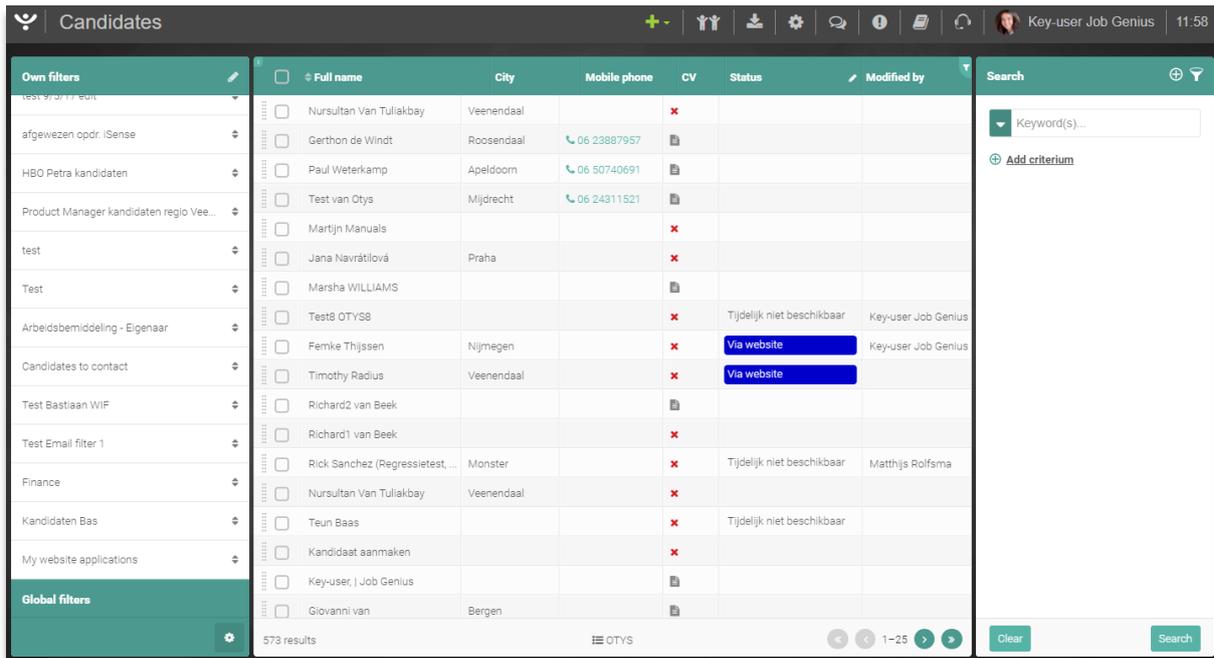
Most modules in OTYS Go! have a fixed setup. This is true for the following modules:

- Candidates
- Vacancies
- CRM
- Procedures
- Activities
- Sales
- Tasks
- Assignments
- Timesheet
- Billing
- Underutilisation list
- Newsletters
- UTS Manager
- SMS
- Interactions

The list views (shown when opening the module) in these modules have the following layout:

- On the left there is a panel for quick search and batch actions
- In the middle there is a list of the items (e.g. one candidate per line)
- On the right side there is a panel to perform an advanced search

More information about the layout and functioning of these modules can be found in the instruction manual 'Lists, searching & matching in Go!'. For the other modules you can read more information on their functioning in the instruction manual for the relevant module.



Full name	City	Mobile phone	CV	Status	Modified by
Nursultan Van Tullakbay	Veenendaal				
Gerthon de Windt	Roosendaal	06 23887957			
Paul Weterkamp	Apeldoorn	06 50740691			
Test van Otys	Mijdrecht	06 24311521			
Martijn Manuals					
Jana Navrátilová	Praha				
Marsha WILLIAMS					
Test8 OTYS8				Tijdelijk niet beschikbaar	Key-user Job Genius
Femke Thijssen	Nijmegen				Key-user Job Genius
Timothy Radius	Veenendaal				
Richard2 van Beek					
Richard1 van Beek					
Rick Sanchez (Regressietest, ...)	Monster			Tijdelijk niet beschikbaar	Matthijs Rolfsma
Nursultan Van Tullakbay	Veenendaal				
Teun Baas				Tijdelijk niet beschikbaar	
Kandidaat aanmaken					
Key-user,   Job Genius					
Giovanni van	Bergen				

Fig. 5 – Example list view

After opening an item in a module (for example, after opening a candidate in the Candidates module) a detailed view appears.

Most modules in OTYS Go! have a fixed setup for these detailed views. This is true for the following detailed views:

- Calendar
- Candidates
- Vacancies
- Relationships
- Contacts
- Activities
- Sales
- Tasks
- Assignments
- Timesheet
- Billing
- Newsletters
- UTS Manager
- Interactions

This setup is as follows:

- A detailed view always opens in a full window over the current screen. This will allow you to keep working in the current module (which increases the speed of working). So, if you open a candidate from the dashboard, the candidate details appear over the dashboard.
- In the top bar of the detailed view along the left side you see the basic information of the item you have opened (e.g. name and status of the candidate), and on the right are buttons to perform an action on the item (e.g., generating a CV of the candidate).
- A detailed view consists of several tabs. In addition, a tab can also consist of sub-tabs.
- Each tab has a specific layout. For example, two equally wide columns; a narrow and a wide column, or a column over the entire width.
- Within this layout there are different components in sections (called widgets). For example, there is a widget with vacancies matched to the candidate and a widget with the relationship's contacts. The 'dossier' is a widget as well.

You can read more information about the setup of these detailed views and their functioning in the instruction manual 'Detailed views in Go!'. For the other modules you can read more information on their functioning in the instruction manual for the relevant module.

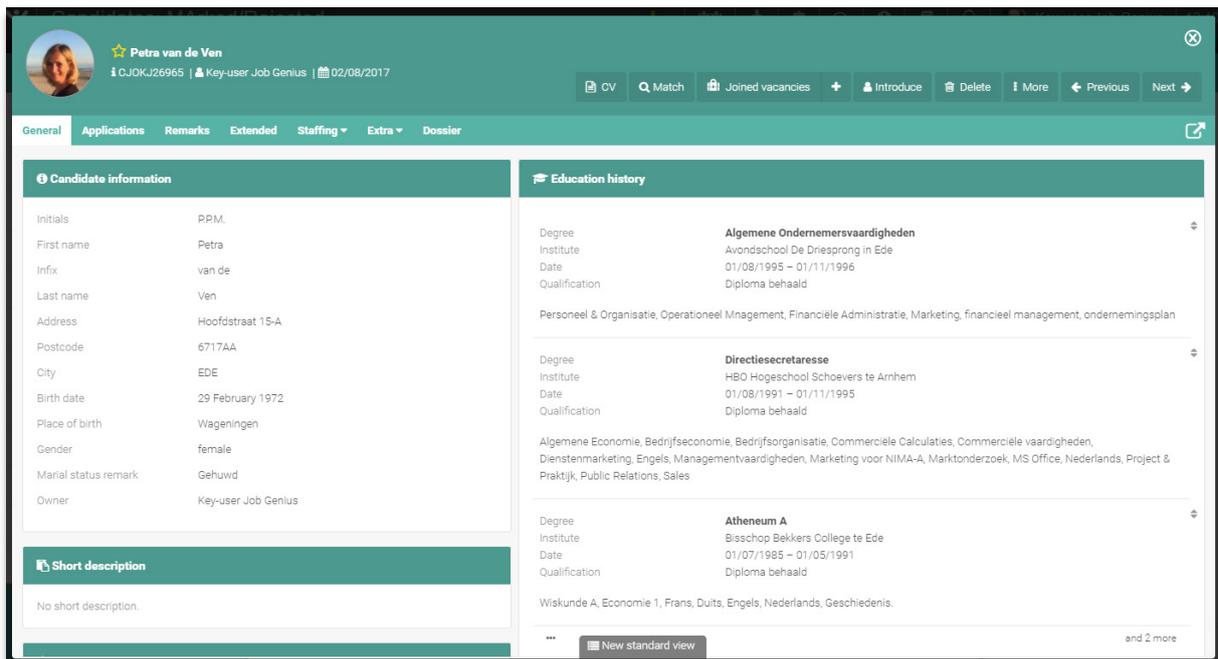


Fig. 6 – Example detailed view

## 2.5 CHANGE PROFILE

Each user in OTYS Go! has their own profile. In this profile you can modify items such as your name, photo and preferred language. You can also choose a specific 'theme' that determines the appearance of your OTYS Go! system.

To customise your profile, click in the top right corner on your name and select 'My Profile'. You can then use the 'Edit photo' button on the left, or delete your photo by using the 'Delete photo' button. The middle of the screen shows the basic information that we have about you. You can customise this to your liking and save it by clicking the Save icon in the top right corner. At the bottom you see the themes available to you. By clicking on the 'Apply theme' button, you will see that the appearance of your OTYS Go! system has been changed to the chosen theme.

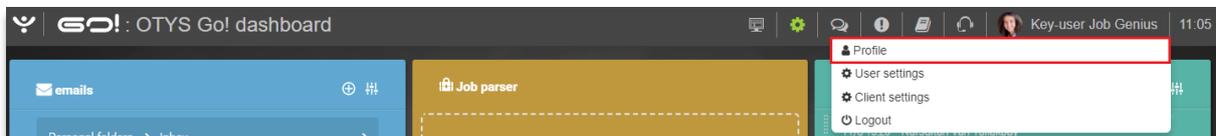


Fig. 7 – Opening My profile

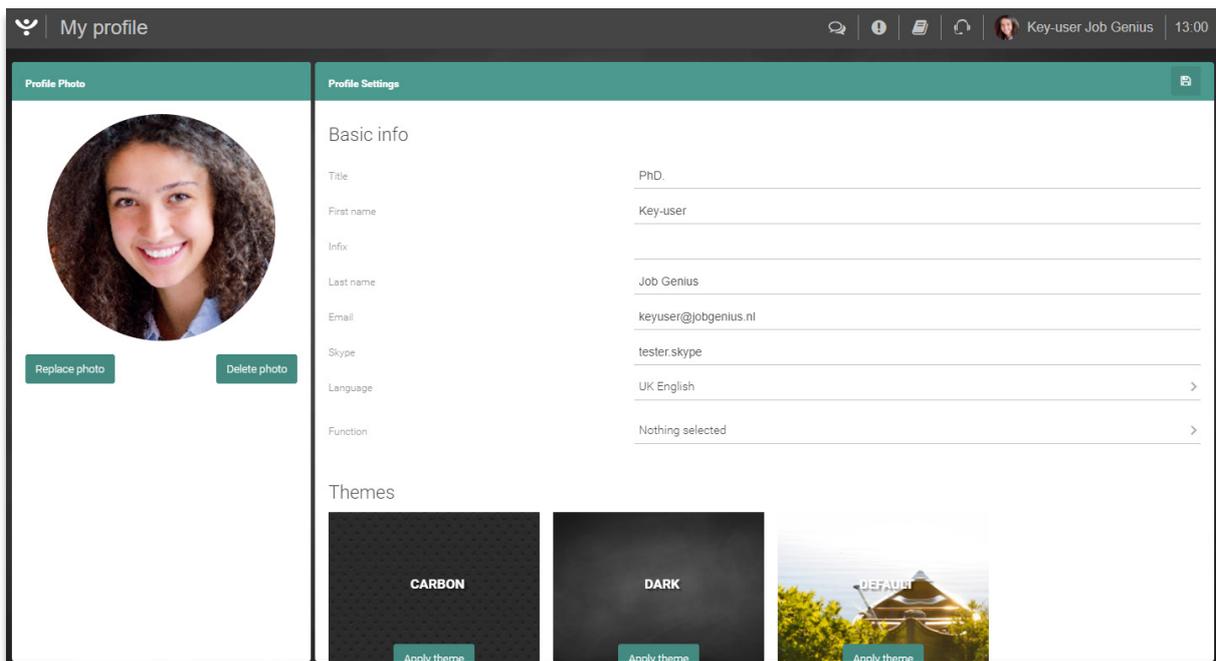


Fig. 8 - My profile page

## 2.6 CHANGE USER AND CLIENT SETTINGS

In addition to changing your profile, you can change various settings. The settings you can change depend on your authorisation. If you are registered with us as Key-user, you can change both settings for your entire organisation (client settings), for yourself (user settings), and your colleagues

(user settings). If you are registered with us as a regular user, you can only change your personal settings (user settings).

To change settings for your entire organisation as a Key-user, click on your name in the top right corner and choose 'Client settings'. A window appears in which you can see an overview with settings on the left and a search filter on the right. These settings are categorised and expanded by default. You can collapse or expand the underlying options for a (sub)category by clicking the icon next to it. The top of the list also has 'Collapse all' and 'Expand all' buttons. At the bottom of the list you will see the number of settings currently displayed. We display up to 200 settings in a single view. To find the proper setting, use the search filter on the right hand side. Here you can search for the name and/or description of a setting by keyword. It is also possible to search for settings within a particular category.

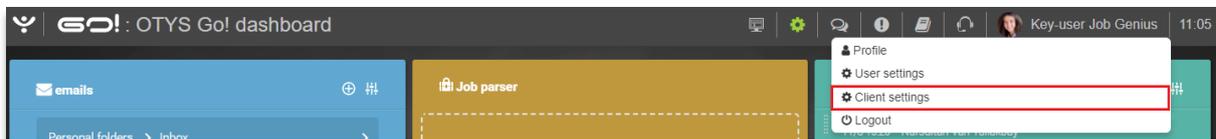


Fig. 9 – Opening client settings

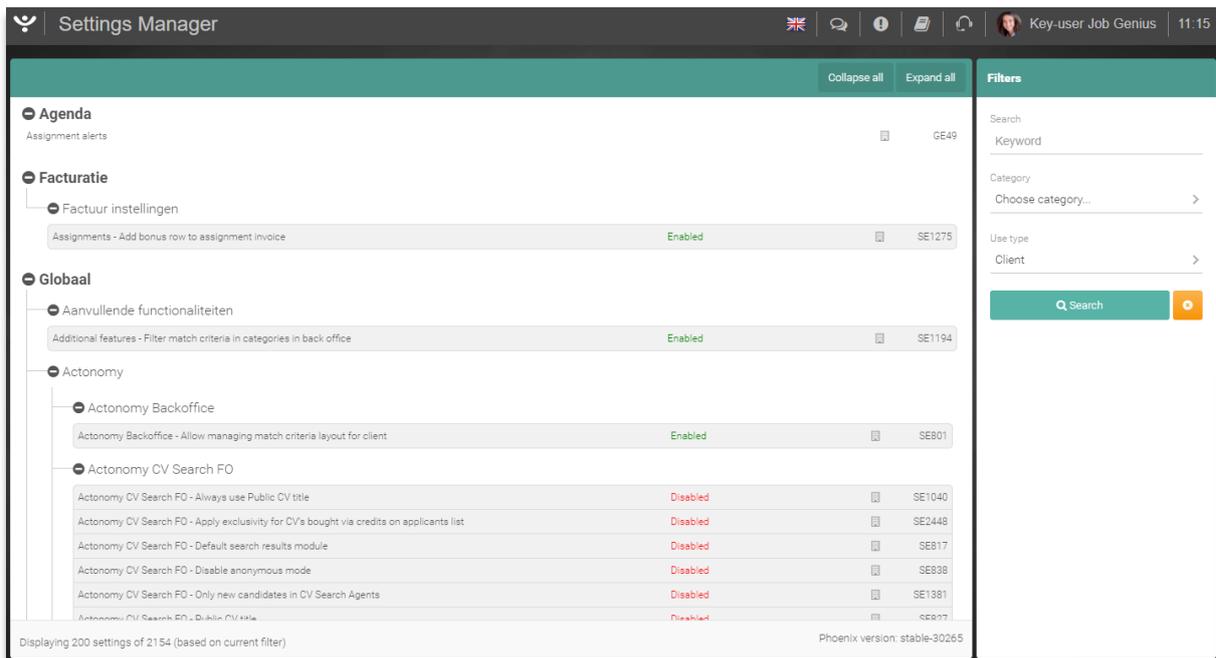


Fig. 10 – Client settings page

After you find the desired setting in the list, click on it to open a window. In most cases, you will see an additional description of the setting and you can change the setting here. This is often a choice between 'Active' or 'Disabled', but it can also be different (depending on the setting). After clicking the 'Save' button, the setting is changed. Most settings will immediately be active. In some cases

there will be a (small) delay. In addition, it may be that colleagues have to refresh their screen (e.g. by pressing F5) to see the effect of the changed setting.

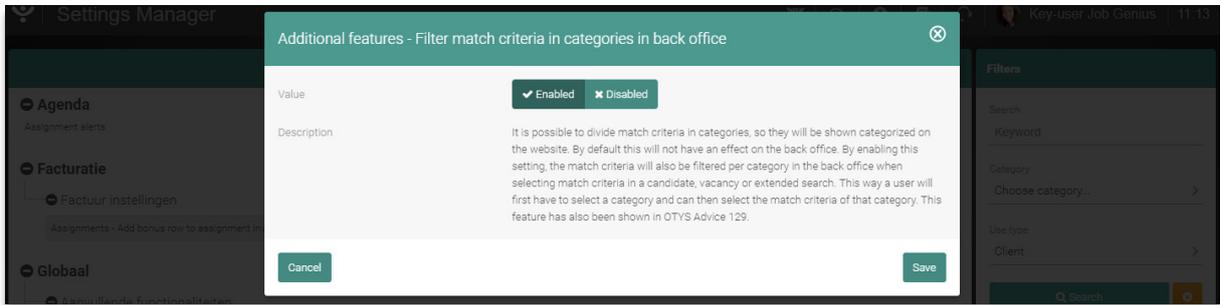


Fig. 11 – Setting details

To change settings for yourself, click in the top right corner on your name and select 'User settings'. A similar window to that of the aforementioned client settings appears, obviously showing different settings. If you are a Key-user, you also have the option of specifying the user for whom you wish to adjust the setting on the right hand side. By default your own name is selected, but you can also select the name of a colleague. Again, most of the settings will immediately be active. In some cases there will be a (small) delay. In addition, it may be that colleagues have to refresh their screen (e.g. by pressing F5) to see the effect of the changed setting.



Fig. 12 – Opening user settings

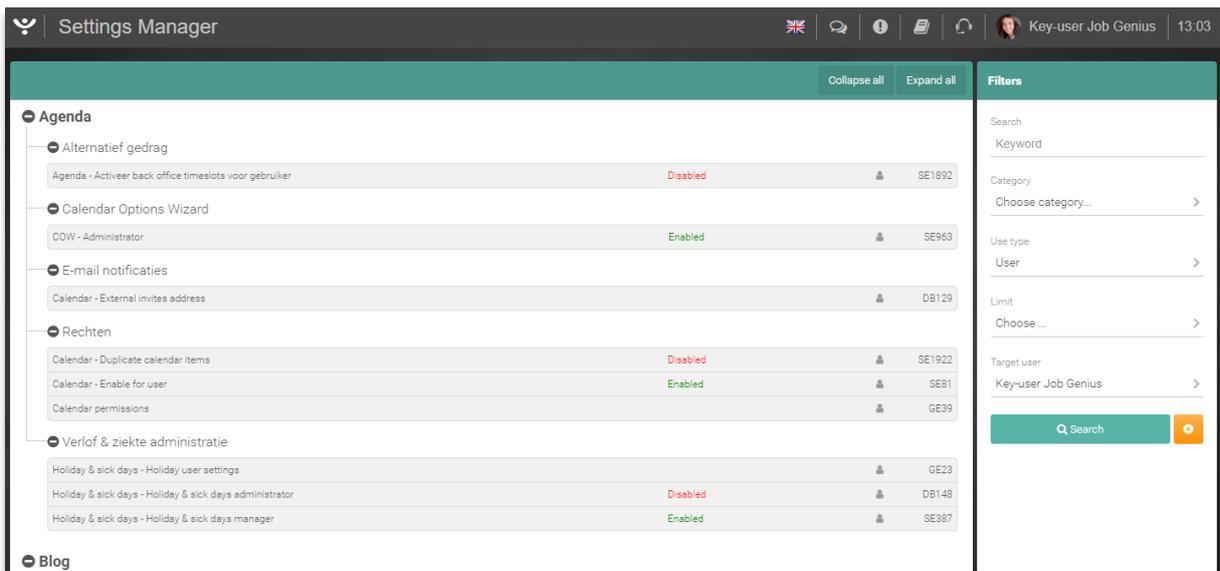
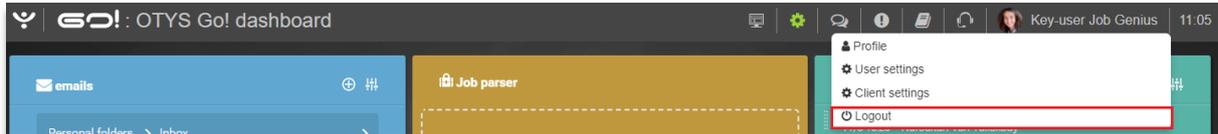


Fig. 13 – User settings detail

## 2.7 LOGOUT

In order to log out of OTYS Go!, click in the top right corner on your name and choose 'Logout'. If you do not do this, but instead close all your OTYS Go! browser windows, you will also be logged out (unless you ticked the option 'Keep me logged in'). Once you have logged out you will return to the login screen.



*Fig. 14 – Logging out of OTYS Go!*

