



DASHBOARD MODULE

INSTRUCTION MANUAL



OTYS Recruiting Technology



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1. INTRODUCTION

1.1 ABOUT DASHBOARDS IN OTYS GO!

The dashboards in OTYS Go! offer the user the option of personalising their home screen as much as possible. OTYS has the philosophy that the process steps to be taken by a user must be as few as possible. That is, a user must have direct access to specific options that are frequently used. This is why we created dashboards.

A board is a screen filled with widgets. Because you can create multiple boards, you can vary endlessly with different views, widgets and actions. A widget is a small window that can be placed on the dashboard. A widget is based on a module, so dashboards give an immediate overview of the key updates in a module, and you can go to the module by pressing a button. As widgets can be configured and placed on a dashboard in several ways, the possibilities are endless.

1.2 INSTRUCTION OBJECTIVE

These instructions are intended for OTYS clients, to enable them to configure dashboards and adjust them to their liking in OTYS Go! If there are any provisions which lie beyond the scope of the dashboard module instruction manual, we will refer you to the relevant instruction manual.

1.3 INSTRUCTION STRUCTURE

After this introduction we will explain the available functions and possible actions you can undertake via the dashboard:

- Basic functions
- Details of the widgets

Each chapter begins with an introduction, after which the various operations are discussed by subject/section.

2 | BASIC FUNCTIONS

2.1 CONFIGURE BOARDS

When you start with OTYS Go!, the dashboard will be empty. You can configure the dashboard with the cogwheel settings icon 'Configure boards' in the window with action buttons. If you click it, a panel with all the available widgets - depending on the modules you have enabled - will appear. You can read in the rest of this chapter how you add these widgets.



Fig. 1 - Configuring boards.

2.1.1 ADD AND REMOVE BOARDS

Boards can be found at the bottom of the configuration panel. By clicking on 'Manage boards' you access the configuration section where you can add new boards or edit existing boards. You can create a new board by clicking the '+' button. You then name it and click on 'Add board'. If there is an existing template that you want to select, you can do so here. The board can then be found in the list in the configuration panel. By clicking on the icons behind the name, you can edit, remove or share a board.

2.1.2 SAVE A BOARD

If you have completed the layout of a board, you can save it as a template so that colleagues can also use it. You can save a board in the configuration panel:

1. Open the configuration panel and go to 'Manage boards'.
2. Go to the name of the board you want to save. Click on the pencil icon behind the name ('Edit').
3. Tick 'Is a template' and click 'Save' to save the changes.

Your colleagues will see this board on their dashboard as a standard template with the name you gave it.

2.1.3 REARRANGE THE BOARDS

Each board you add is displayed below the last one. You can rearrange the boards by using the  (up/down arrow keys) at the end of the line of the name of the board. Hover your cursor over it until your cursor changes shape. You can now drag the board upwards or downwards.

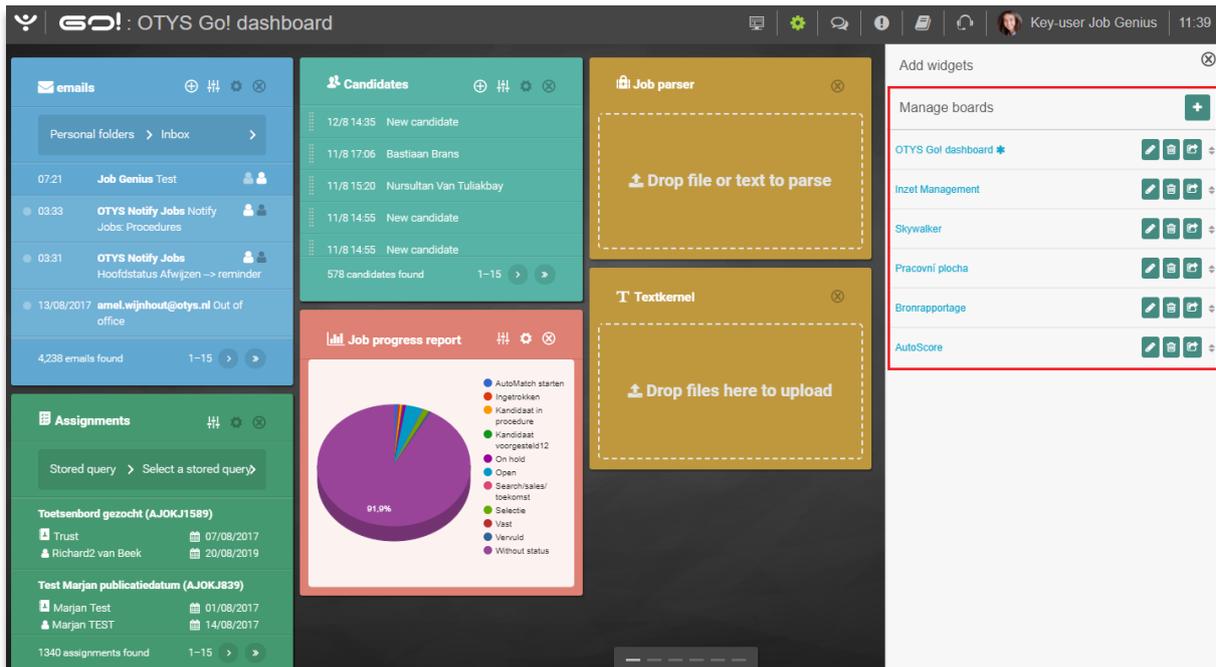


Fig. 2 - Managing boards in the configuration panel.

2.1.4 NAVIGATE THE DASHBOARD

In OTYS Go! you can navigate your dashboards in two ways. You can click on the bars at the bottom of your screen or you can swipe to another board. The latter is done in the following way:

1. Click anywhere on the overview screen of the dashboards.
2. Hold the left mouse button, then move your mouse to the left or right and release the mouse button.

2.1.5 DISPLAY THE BOARD IN PRESENTATION MODE AND SHARE

To the left of the configuration panel there is a button to display a dashboard on multiple screens. If you click on Presentation mode, the dashboard will open in a new window, only displaying all widgets. This feature is ideal if you want to share certain widgets in a public area of your office, for example, a board with calendar widgets at the reception.

The display screen has a separate URL so you can share the board with other users. Please note that the person who receives the URL can click on the dashboard. So make sure that you only share the board with those who are authorised to see this (personal) data.

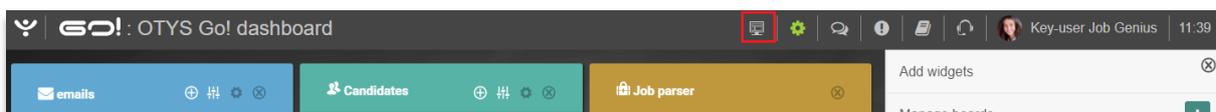


Fig. 3 – Opening the dashboard in Presentation mode.

2.1.6 SECURE A BOARD WITH A PIN OR PASSWORD

To ensure that unauthorised persons do not access the dashboard, you can secure the shared URL with a PIN or password. You can do this via the following steps:

1. Go to the configuration panel and then to 'Manage boards'.
2. Next to the name of the board is the icon for sharing the board. Click it to open a new window.
3. Enter a password or PIN, then click 'Save settings' to save the data, or 'Stop sharing' if the dashboard does not have to be shared any longer.

The screen displays two URLs: an URL for sharing *without* a password or PIN, and an URL for *securing* the board. Next, you share the appropriate link with another user.

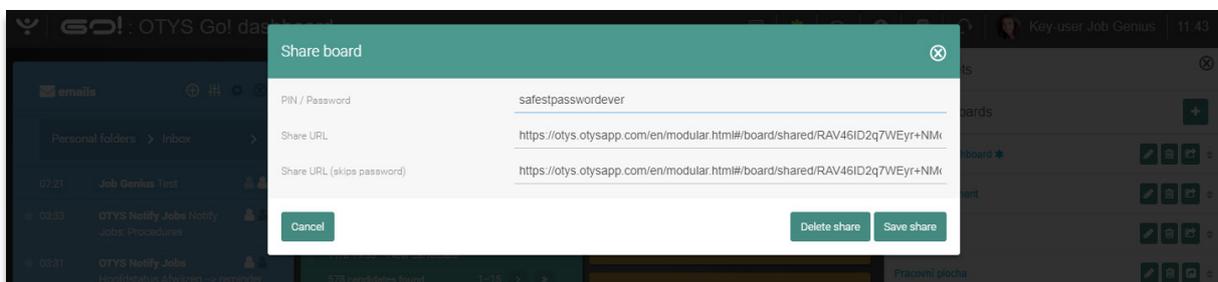


Fig. 4 – Sharing a dashboard with or without security.

2.2 CONFIGURE WIDGETS

The widgets in OTYS Go! can all be configured in the same way. This allows you to set each widget to your personal preference. To configure a widget, you must work in the configuration panel. If you have enabled this function, you will see various icons in the upper corner of each widget. Each widget has the cogwheel settings icon for modifying the widget settings and a cross for removing the widget from your dashboard. Some widgets also feature action buttons to create a new item (such as a new email) from dashboards, and to quickly show or hide filters.

2.3 ADD AND REMOVE WIDGETS

2.3.1 ADD AND REMOVE WIDGETS

In the configuration panel, you can find a collection of widgets under the header 'Add widgets'. The widgets are categorised into General, Reports, Recruitment, Productivity, and Other. Depending on your user role (basic user or Key-user) and enabled modules, certain widgets are or are not available.

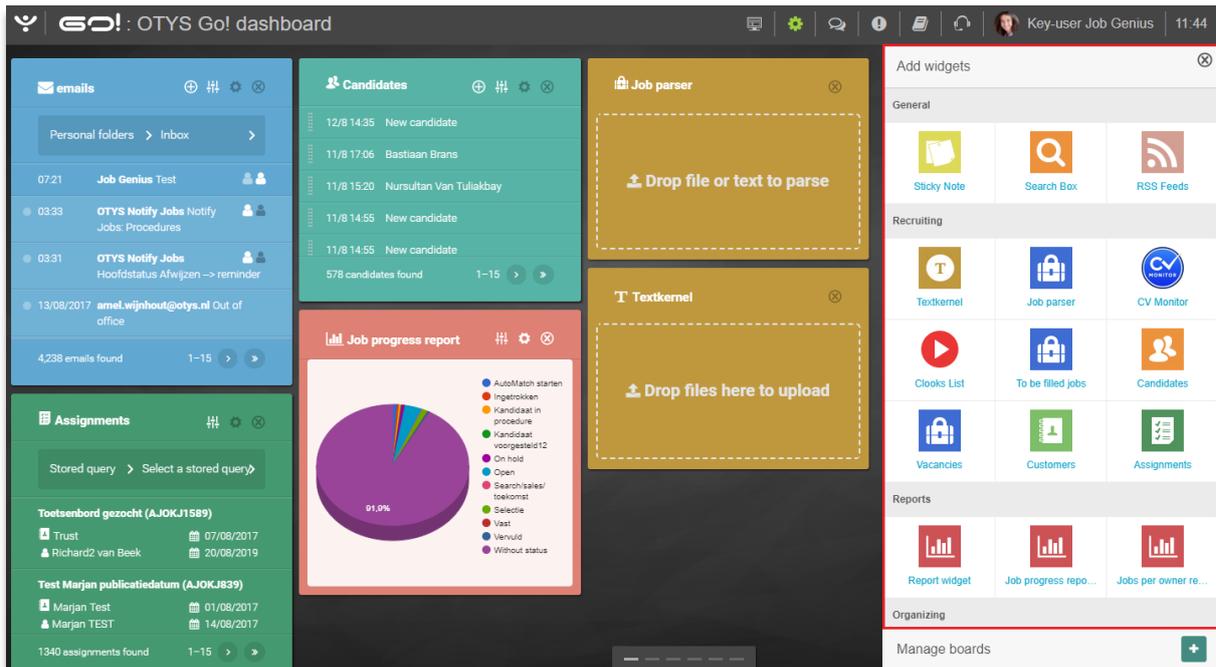


Fig. 5 - The collection of widgets.

Widgets can be added to your board in two ways:

1. You click on the widget. The widget is then automatically placed at a random spot on your board;
2. You click, hold the left mouse button and drag and drop at the place where you want to position it.

The widgets adapt automatically to the grid, that is to say that they will align properly with each other. To remove a widget, click the Close icon (the circle with the cross) in the widget itself.

2.3.2 ENLARGE AND REDUCE WIDGETS

You can decide how large a widget should be. Make sure you are in Configuration mode. When you hover your cursor over the lower right corner, your cursor changes into a diagonal arrow. You can now resize the widget in length or width. When you release the mouse button, the widget will retain that size. By adjusting one widget in size, the layout of your board will also change because the other widgets will automatically adapt.

2.3.3 MOVE WIDGETS ON THE DASHBOARD

Once a widget is placed on the dashboard, you can always give it a different place on the board.

1. Click on the configuration panel on 'Configure boards'.
2. Hover your cursor over the widget you want to move until the cursor changes into a diamond with four arrows.
3. You can now drag the widget to a different section of the board.

3 | DETAILS OF THE WIDGETS

This chapter describes the different widgets in detail.

3.1 GENERAL WIDGETS

3.1.1 NOTE

Notes appear in dashboards as a 'post-it note', or as a transparent window on your screen, depending on the theme you selected for the dashboard. Note is the only widget you can edit without enabling the configuration panel. You do this by simply clicking at the top of the note and start typing.

In the configuration screen of the widget 'Note' you can:

- Content
Enter the contents of your notes.
- Colour
Adjust the colour of the widget.

3.1.2 QUICK SEARCH

The widget 'Quick search' allows you to instantly find a contact or candidate, and open the detailed view. When you type a part of the name, Quick search immediately displays all the options that correspond to the names in your database. Behind the names you see an abbreviation. CP stands for contact person and CA for candidate. You can customise the widget with the following functions:

- Widget title
Change the name of the widget.
- Widget colour
Change the colour of the widget.
- Entities to search
To specify the groups you want to search. For example, only in your Contacts or in Candidates and Relationships.

3.1.3 RSS FEEDS

RSS feeds contain messages that are presented in a standard format which makes them easy to read for RSS readers. You can customise the widget in the configuration screen. The configuration screen has the following options:

- Widget title
Rename the widget, for example 'News'.
- Widget colour
Adjust the colour of the widget.

- Refresh Interval
You can set how often you want to refresh the RSS feeds so you will see new messages.
- Channels
Here you can select from which pages you want to retrieve RSS feeds. The pages can be set in the RSS module.
- Show summary
Enable this option to see the title of the post, along with the first few lines of the message.
- Limit
The limit of the number of messages is set to 20 messages by default. On your dashboard you can set how many posts you want to display.

Please consult the RSS module instruction manual for the detailed operation of the RSS module.

3.2 RECRUITMENT WIDGETS

3.2.1 CVMONITOR

If you use CVmonitor, you can rapidly retrieve recently screened CVs. The configuration panel of CVmonitor offers the following options:

- Widget title
Rename the widget.
- Widget colour
Adjust the colour of the widget.
- Last x days
Here you specify the number of days for which you want to see the most recent changes.

3.2.2 CLOCKS

If you are using Clocks Video Application, this widget contains all candidates who have received an invitation for a video application interview. The configuration option in the widget lets you set the:

- Widget title
Rename the widget.
- Widget colour
Adjust the colour of the widget.
- Show only completed interviews
By placing a tick next to 'Active', you will only see the ongoing interviews. If you do not place a tick you will see all the interviews.
- Including number of days before today
Set the number of days for which you want to rewatch interviews.
- Limit
Set the number of interviews you want to display in the widget. The widget cannot display more than 20 interviews at once.

When you click on a candidate in the widget, you immediately go to the candidate details. These functions are further described in the Candidates module instruction manual.

3.2.3 CANDIDATES

The Candidates widget is based on the Candidates module. You can create a new candidate quickly from the widget by clicking . The configuration screen of the widget has these options:

- Widget title
Rename the widget.
- Widget colour
Adjust the colour of the widget.
- Show quick selection widget options
With quick selection options you can filter the widget directly on keywords, candidate status and self-defined filters.
- Standard view
You can display the candidates in the widget in three ways: by keyword, status or filter (which you have created first).
- Status (for standard view status)
Here you can filter candidates by status in the recruitment process, such as 'Contact' or 'Invite'.
- Filter (for standard view filter)
Here you can select a filter from the filters that you created in the Candidates module.
- Additional fields
Here you can add additional fields to the widget, such as 'Telephone number' or 'Email'.
- Results per page
Displays the number of candidates in the widget. This is set to a maximum of 15 candidates per page.

You can place different Candidates widgets on one board to create an easy overview; for example, by making a widget for sales candidates and a widget for marketing candidates. You go directly to a candidate in the Candidates module by clicking their name. More information about the Candidates module can be found in the Candidates module instruction manual.

3.2.4 VACANCIES WIDGET

The Vacancies widget functions in exactly the same way as the Candidates widget. Again, you can quickly create a new vacancy and give the widget a different title, colour and setup in the configuration mode. You can quickly create an overview by placing multiple Vacancies widgets on your board. For example, you can use one widget for new vacancies, a widget for vacancies with ongoing procedures and a widget for vacancies filled.

When you click on a vacancy in the widget, you immediately go to the details screen of the Vacancies module. More information on these modules can be found in the Vacancies module instruction manual.

3.2.5 CRM WIDGET

The CRM widget also has the same options as the Candidates and Vacancies widgets. Use the CRM widgets, for example by creating filters for the type of client; small-medium business, large account, etcetera. For each query that you create in your CRM module, you can set up a widget to see, at a glance, how many and which relationships meet those criteria.

When you click on a relationship in the widget you go directly to the relationship details. For more information about this module, please consult the CRM module instruction manual.

3.2.6 ASSIGNMENTS WIDGET

You can also use this widget when using the Assignments module. It works the same as the Candidates, Vacancies and CRM widgets. The Assignments widget also offers the option to select 'Future' in the Standard view. This allows you to see all the assignments that lapse in the future.

When you click on a relationship in the widget you go directly to the relationship details. The functioning of the Assignments module is described in detail in the Assignments module instruction manual.

3.2.7 VACANCIES

When you use the Scheduling module, you also have this widget at your disposal. If there is a schedule with at least one shift that is marked vacant, it will be displayed in this widget. In the widget you can create a new vacancy in the Vacancies module.

3.3 PRODUCTIVITY WIDGETS

3.3.1 CALENDAR

The Calendar widget displays your calendar for today by default. In addition to the date, you will find the number of appointments you have in the selected period.

If you want to configure this widget differently, the configuration panel offers the following options:

- Widget title
Rename the widget.
- Widget colour
Adjust the colour of the widget.
- View
Choose from a view by month, week, day or compact view to be displayed in the widget.
- Use selection option in widget
If you have ticked this you can change the view from the widget without having to enable the configuration panel.

- Link to
With this option you can link multiple calendars. The functioning is explained in section 3.3.2.
- Start time/End time (for day view)
Select the start and end times displayed in the widget.
- Display upcoming events for today (for day view)
By enabling this feature, all future appointments for today are displayed.
- Period (for compact view)
Select whether you want to display a day, week or month in the widget.
- Results per page (for compact view)
Determine how many results to display in the widget. This has a limit of 20 results per page.

3.3.2 LINK CALENDAR

If you have placed two calendar widgets on your dashboard, you can link them. It works as follows:

1. Select one calendar widget that you configure to display 'month';
2. Add a second calendar widget, which you configure to display 'day';
3. The option 'Link to' is displayed. Choose 'Calendar';
4. Both calendar widgets are now linked. For example, clicking Tuesday 6 September in the month view will display the daily schedule for 6 September in the other calendar. This makes it even easier to navigate your calendar.

Clicking a calendar item directly opens the detailed view.

3.3.3 EMAILS

The Email widget immediately displays your most recent emails. You can also choose to configure a different view or folder. The configuration panel allows you to set the:

- Widget title
Rename the widget.
- Widget colour
Adjust the colour of the widget.
- Use selection option in widget
If you have ticked this, you can change the view in the widget without having to enable the configuration panel.
- View
Set the folders you want to have displayed in the widget. Here you can choose from personal and public folders, and defined filters.
- (Public) Folder
Select a folder from your personal or public mailbox.
- Filter (for Filter views)
Choose a filter that you want to display in the widget.

- Results per page (for compact view)
Determine how many results to display in the widget. This has a limit of 15 results per page.

You can create multiple widgets for your email. For example, by configuring these differently, you could call one widget 'Request information' to show the information mails, and also place a widget for your latest emails on your dashboard. By clicking an email message, you open the email.

3.3.4 CONGRATULATORY MOMENTS

The Congratulatory moments widget is linked to the field 'Congratulatory moments' in the Candidates module. In the configuration mode you can set the:

- Widget colour
Adjust the colour of the widget.
- Days in the future
Set the number of days you want to look ahead. Useful if you want to send a card on time.
- Limit
Set the number of congratulatory moments you want to display in the widget. The widget cannot display more than 10 congratulatory moments at a time.

3.3.5 SALES

You can also use this widget when you use the Sales module. The Sales widget allows you to monitor the latest changes in sales processes. It displays sales processes in which the probability or value has recently been adjusted.

3.3.6 REMINDERS

The Reminders widget gives you a quick list of reminders that you created for yourself and the option to create a new reminder. In configuration mode you can also set:

- Widget title
Rename the widget.
- Widget colour
Adjust the colour of the widget.
- Show quick selection widget options
With quick selection options you can filter the widget directly on keywords, candidate status and self-defined filters.
- Show period
Show all reminders or the reminders in the past or in the future.
- Results per page
Set the number of results to display in the widget. This has a limit of 15 results per page.

3.4 REPORTS WIDGETS

When using the Reports module, you can also place reports widgets on your dashboard. The widgets 'Vacancy progress' and 'Vacancy owner' are pre-filled with data from your system. The widget 'Reports' can be set up with reports that you created in the Reports module.

3.4.1 VACANCY PROGRESS/VACANCY OWNER

The pie chart that is automatically generated in these widgets is based on the data from the Vacancies module. Neither widgets are customisable, but they provide you with information about the percentage of vacancies with a certain status, and the percentage of vacancies associated with a given owner. The percentages are also expressed in absolute numbers so you instantly know the number of open vacancies, for example.

3.4.2 REPORTS

This widget can be configured with reports that you have already created in the Reports module. You can define this widget with:

- Widget title
Rename the widget.
- Widget colour
Adjust the colour of the widget.
- Change interval
The interval period is disabled by default, so no processor time is consumed. You can change the interval period if you want to refresh your reports regularly.
- New tab
Within one widget you can show multiple reports on tabs.
- Report name
Rename the tabs after the report you wish to show here.
- Refresh interval
An interval can be set per tab as well.
- Reports
All reports you created in the Reports module are shown in this drop-down menu. This allows you to determine which reports you want to display in the widget.
- Only data from logged in user
By ticking this box, only the reports of the logged in user will be displayed.
- Use original report settings
By ticking this box, the widget uses all the report settings as configured in the Reports module. If you untick it, you will get the option to set a period, period type and date view.
- Select chart
Choose a bar chart, column chart, line chart or pie chart.
- Display legend
Tick 'Display' to display the legend for the chart.

The Reports module instruction manual contains all the information on how to use this module.

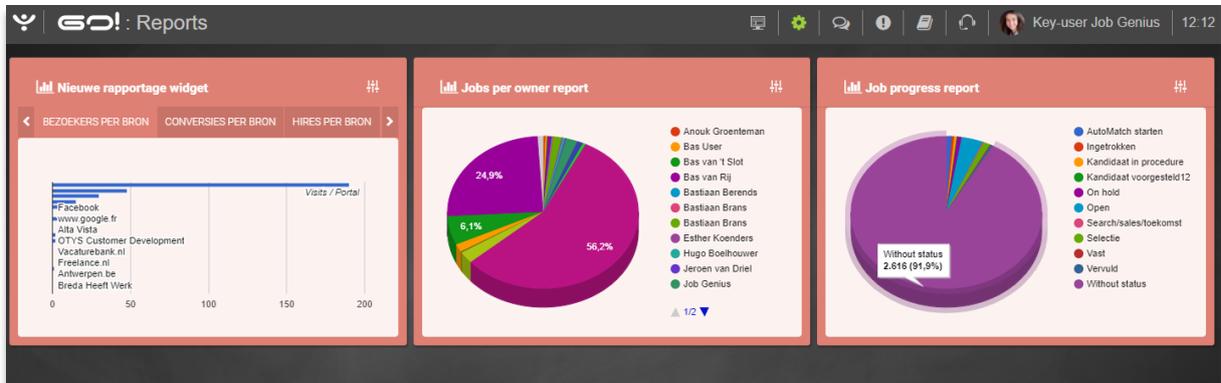


Fig. 6 - Reports widgets OTYS Go!

3.5 OTHER

3.5.1 CUSTOMISE THEME

The OTYS Go! dashboard has a number of different themes. With the widget 'Customise theme' you can change the background picture and the overall colour of the widgets. You can also adjust the colours of the widgets individually.