



# INTERACTION MODULE MANUAL



OTYS Recruiting Technology





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# 1 | INTRODUCTION

## 1.1 ABOUT THE INTERACTION MODULE

Our Interaction Module enables you to create forms that 'interact' with your database. You can, for example, compose a form that you use in your OTYS Go! system to enter a vacancy in a simple way (in your own format). Using a form you have created yourself allows you to decide which fields are requested. You can determine the order of the questions, divide the questions over various tabs and set questions as required/desired. This contributes to a simpler and more uniform work process. This is just one example of how you can use this module. You can also use the module, for example, for assistance with checking references for a candidate or for having clients register vacancies with you via your website(s).

## 1.2 PURPOSE OF THIS MANUAL

Using forms that interact with your database can support your process in different areas. In this manual we explain how the Interaction Module in Go! works, what the possibilities are, and we give you several examples of how you can use these in your daily work process.

## 1.3 STRUCTURE OF MANUAL

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

A distinction is made between:

- Basic functions in the Interaction Module
- Management of interaction forms in the Interaction Module
- The use and the usability of these forms in your process

## 2 | BASIC FUNCTIONS

### 2.1 SEARCH AND FILTER

If you frequently use interaction forms, you can use the advanced filter and search function of OTYS Go!. You can find the search function in the right-hand panel on your screen. Here you can add multiple criteria to find the right search result. If you want to use this combination of search criteria more often, you can save the search as a filter. The filter can then be found in the left-hand panel of your screen, so that you can carry out your saved search with a single click at any time. Instructions on how to best use these functions are given in the manual 'Lists, Searches and Matching in Go!'. We have chosen to describe this functionality in a separate manual, because the instructions are the same for multiple OTYS Go! modules.

### 2.2 EDIT YOUR LIST VIEW

Do you often work with the Interaction Module and do you want to edit the columns in the overview? You can do this by clicking on 'Standard view' at the bottom of your screen. Here you can add, delete and change the order of columns. You simply save your new view so you can use it any time. Instructions on how to best use this function are given in the manual 'Lists, Searches and Matching in Go!'.

### 2.3 CREATE NEW FORM

To create a new form in the Interaction Module, click on the 'New interaction form' icon at the top. A new form opens immediately. The next chapter describes the follow-up actions you can perform with this new form.

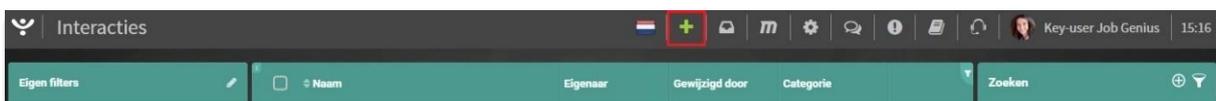


Fig. 1 – Create a new form

## 3 | MANAGE INTERACTION FORMS

### 3.1 MANAGE CATEGORIES

If you have created (or plan to create) many forms, it may be useful to categorise your forms. This gives you a better overview of the forms in your system. These categories can be managed by key users.

A key user can manage these categories 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 'interactions' in the keyword filter on the right side of the screen.
3. Open the setting 'Interactions - Categories'.

A list opens with the existing categories and the option to create a new category.

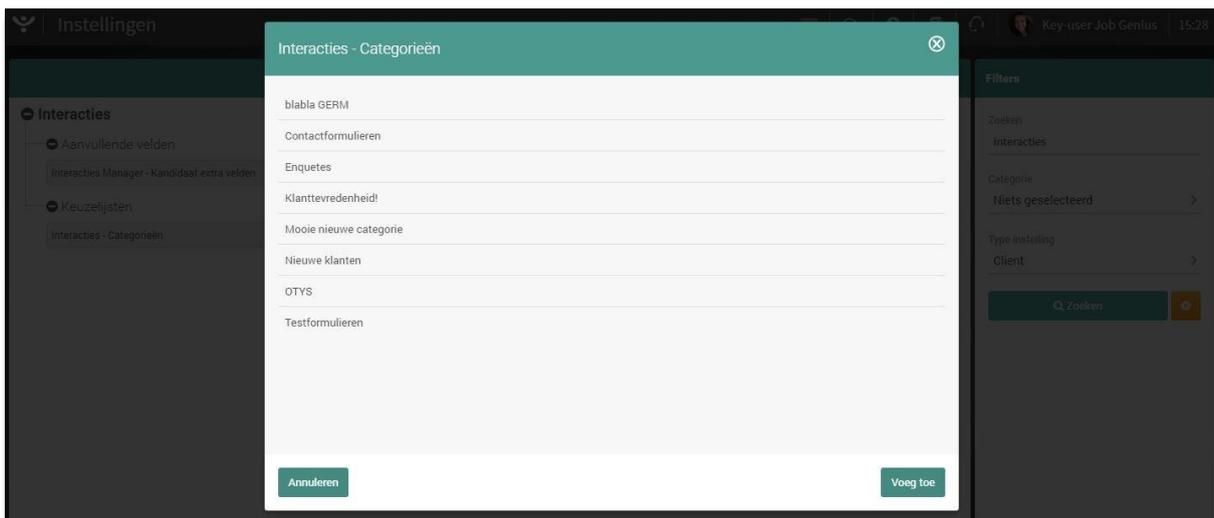


Fig. 2 – Various interaction categories

### 3.2 EDIT BASIC DETAILS INTERACTION FORM

After you have created a new interaction form or opened an existing form, you can edit the basic information in this form. Click on the 'Edit' icon in the 'Form information' widget. You can edit the following data:

- Title  
This is the title of the form. This title is a standard item displayed at the top of the form.

If you use the form in your OTYS Go! system, the title is also a way to make clear to the user which form it concerns if the user can choose between different forms.

- **Description**  
This is an additional description of the form. This description is a standard item displayed below the title of forms on your website.
- **Category**  
This allows you to categorise the form. This can be useful if you have created many different forms. In Section 3.1 we explain how to manage these forms.
- **Action**  
With this, you determine the action to be performed with the form. For example, if you select 'Create candidate' you can use the form to create a candidate in your database. In Chapter 4 you will find several examples of how you can apply these actions.
- **Title thank-you page**  
If the form is completed on the website, a standard thank-you page will follow after the form has been filled out. If you want to display a different thank-you page for this specific form, you can enter the title of that thank-you page here.
- **Thank-you text**  
If the form is completed on the website, a standard thank-you page will follow after the form has been filled out. If you want to display a different thank-you page for this specific form, you can enter the text for that thank-you page here.

Once you have finished editing these basic details, click on the 'Save' icon in the top right corner of the 'Form information' widget. The changes have now been saved.

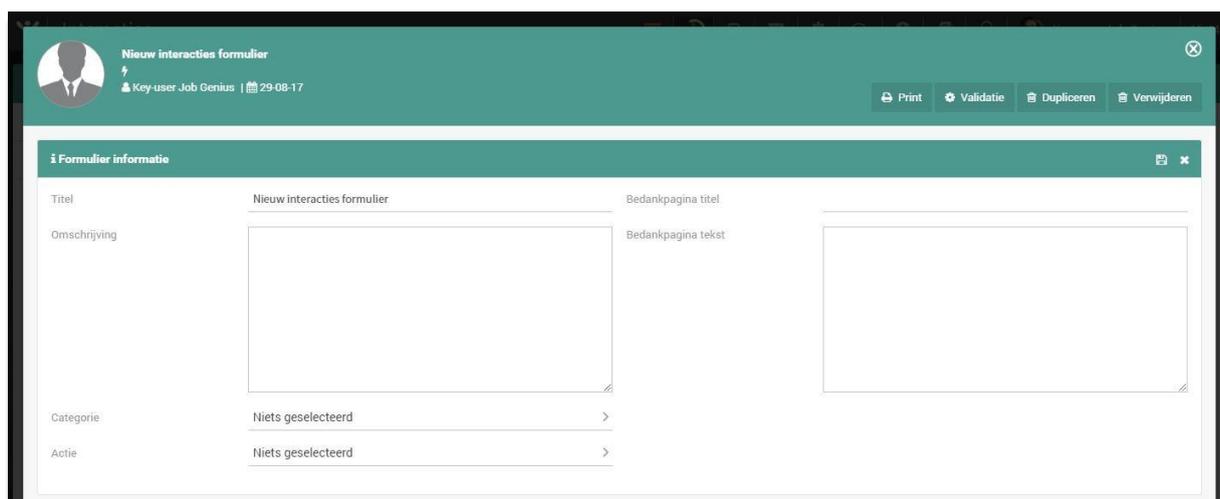


Fig. 3 - Enter basic information in an interaction form

### 3.3 MANAGE TABS

You can distribute the questions in your form over several tabs. This way you can create a better overview in a more detailed form for the person filling in the form.

To manage the tabs of a form, you can take the following actions:

- You can add a tab by clicking on the 'Add' icon in the 'Tabs' widget. A field opens where you can enter the title of the tab. After you have done this, click on the 'Save' button to add the tab.
- You can change the name of a tab by clicking on the name of the tab in the 'Tabs' widget. A field opens with the current title of the tab. After you have changed it, click on the 'Save' button to save this change.
- You can delete the name of a tab by clicking on the name of the tab in the 'Tabs' widget. A field opens with the current title of the tab. By clicking on the 'Delete' button, the tab is deleted.
- You can change the order of the tabs by moving your mouse over the 'Drag' icon on the right side of the tab and then dragging the tab to the correct position. This change will be saved automatically.

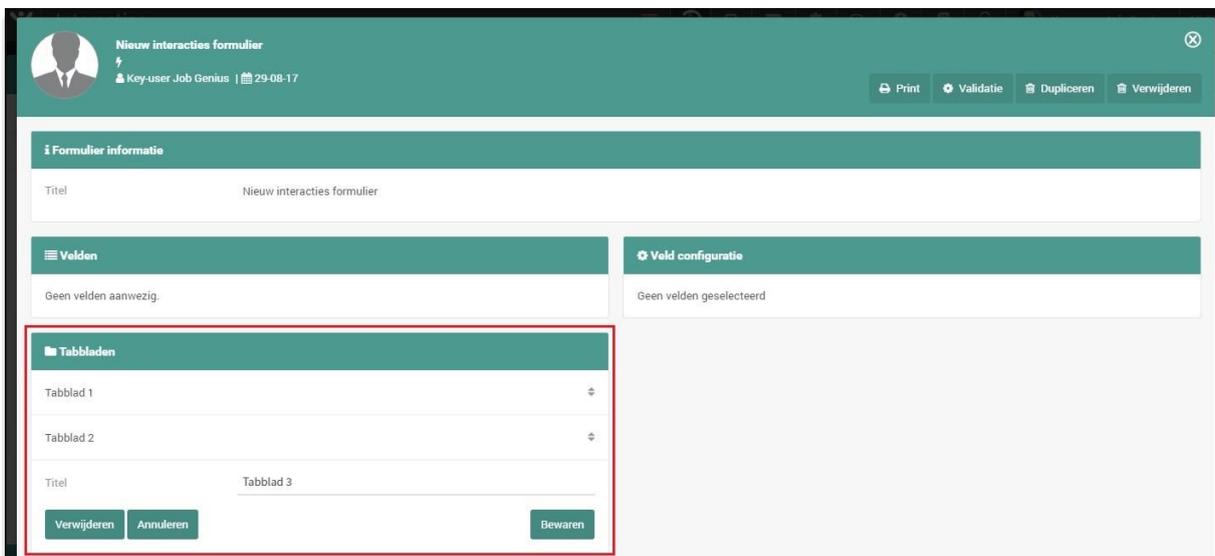


Fig. 4 – Manage tabs in an interaction form

### 3.4 MANAGE FIELDS

A form without form fields obviously is not a great form. To add a new field to the form, click on the 'Add' icon in the 'Fields' widget. An empty form is now shown on the right side of the 'Field configuration' widget where you can fill in the field data. You can enter the following fields:

- Title  
This is the title of the field as it appears in the form.
- Description  
Here you can place additional instructions for the field if the title is not sufficient. This description will be displayed below the title of the field. Use this description only if it has added value.
- Tab  
Here you can determine on which tab the field should be placed. In Section 3.3 we explain how you can manage these tabs.
- Connect to database  
If you want the field to communicate with a certain database table, select the field with which this form field should communicate. For example, if you have set up 'Update candidate' under 'Action' (see Section 3.2) and you select 'Candidate' > 'First name', this field will communicate with the 'First name' field of the candidate. When updating a candidate, the candidate's current first name is automatically loaded and after the form has been saved successfully, the edits to the first name are stored for the relevant candidate.
- Type  
Here you can define the type of field (e.g. a 'Date' field). If you have selected a database field under 'Connect to database', the linked field type will automatically be selected and you will not be able to adjust it.
- Mandatory  
Here you indicate whether the field is mandatory, recommended or not mandatory. If a field is mandatory, the form cannot be saved without this mandatory field being completed. If a field is recommended, a message will be displayed to the user when the form is saved without this field having been completed. However, if the user chooses not to fill in the field, they can save the form. If the field is not mandatory, no validation will take place.
- Display in PDF  
If you generate a form in your OTYS Go! system, the form is automatically stored in the file for the relevant entity. In this file you can also generate a PDF of the completed form. All questions and answers are included in this PDF by default. However, by checking this option you can hide the question and the corresponding answer in this PDF.

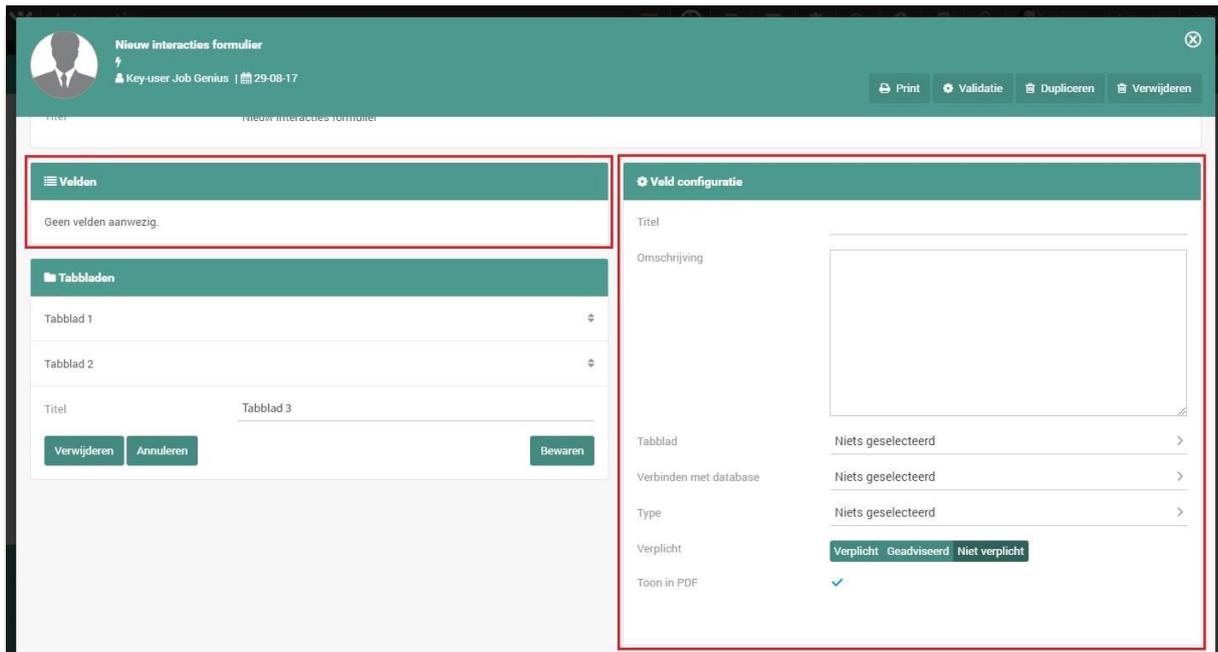


Fig. 5 – Manage fields in an interaction form

After you have filled in the above items, click on the 'Save' icon in the 'Field configuration' widget. The field has now been added and will appear in the 'Fields' widget.

To change an existing field, click the appropriate field in the 'Fields' widget. The field data is now displayed on the right side of the 'Field configuration' widget. You can change the fields in the same way as adding a new field and then click on the 'Save' icon in the 'Field configuration' widget to save those changes.

To delete an existing field, click the appropriate field in the 'Fields' widget. The field data is now displayed on the right side of the 'Field configuration' widget. You then click on the 'Delete' icon in the 'Field configuration' widget. After confirming this action, the field will be removed and disappear from the 'Fields' widget.

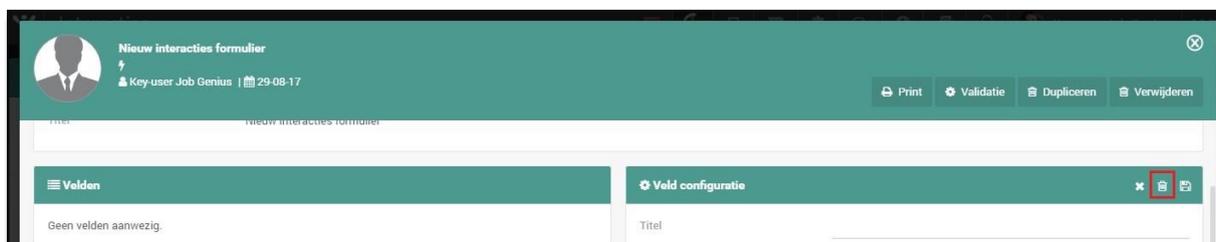


Fig. 6 – Delete fields

You can change the order of the fields by moving your mouse over the 'Drag' icon on the right side of the field in the 'Fields' widget and then dragging the field to the correct position. This change will be saved automatically.

### 3.5 DELETE INTERACTION FORM

If you want to delete a form completely, click on the 'Delete' button in the top right corner of the form. You will be asked for confirmation. After you confirm this action, the form will be deleted.

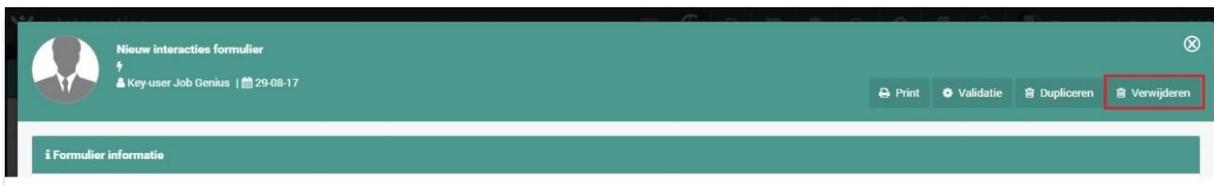


Fig. 7 – Delete an interaction form

### 3.6 DUPLICATE INTERACTION FORM

You can also duplicate a form. With this action you can create a new form based on an existing form.

If you want to duplicate a form, click on the 'Duplicate' button in the top right corner of the form. You will be asked for confirmation. After confirming this action, the new (duplicated) form will automatically open with a small addition to the title (to indicate it is a copy).



Fig. 8 – Duplicate an interaction form

### 3.7 PRINT INTERACTION FORM

You can also print a form. This can be useful, for example, if you have created a form using this function that needs to be filled in 'offline'.

If you want to print a form, click on the 'Print' button in the top right corner of the form. A file in PDF format will be automatically downloaded. You can open and print this file.

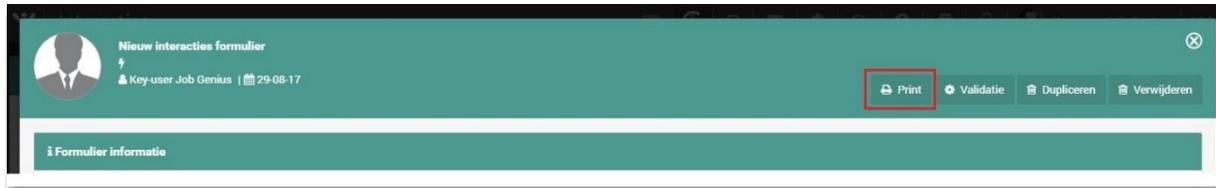


Fig. 9 – Print an interaction form

## 4 | USE INTERACTION FORMS

### 4.1 CREATE NEW CANDIDATE IN GO!

You can use an interaction form in OTYS Go! to create a new candidate. This allows you, for example, to ensure that candidates are created in a simple and consistent way in your system.

To do this, set the action of the form to 'Create candidate' (see Section 3.2). If you then click on the 'Add' icon in the Candidate Module, you will see an extra option 'Via form'. If you hover your mouse over this option, the forms with the action 'Create candidate' will be displayed on the right. After you have clicked on the correct form, the form will open. You can complete the form and click on the 'Save and close' button in the top right corner. After clicking on this button, the system checks whether there are any mandatory and/or recommended fields (see Section 3.4). If this is the case, an (error) message will appear. After all required fields have been completed and you have clicked the 'Save and close' button again, the candidate will be created based on the linked database fields.

You can find the form containing both the fields that are linked to database fields and the fields that are not linked to database fields in the candidate's file. You can still change the form here or generate a PDF based on the completed form.

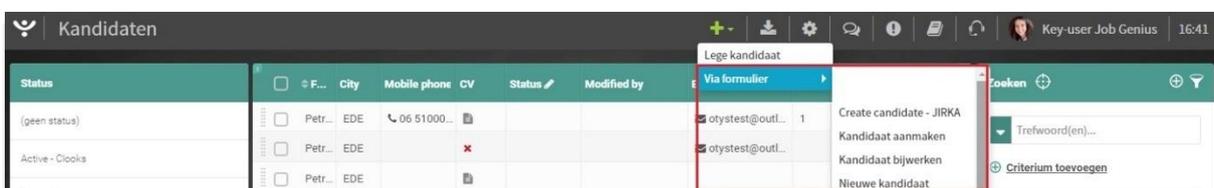


Fig. 10 – Create candidates with an interaction form

### 4.2 EDIT EXISTING CANDIDATE IN GO!

You can also use an interaction form in OTYS Go! to update an existing candidate. This allows you, for example, to check specific details during an intake interview with a candidate to ensure you have the correct details for the candidate.

To do this, set the action of the form to 'Update candidate' (see Section 3.2). If you subsequently click on the 'New interaction form' icon in the candidate's file, the system will check whether there are one or more forms with the 'Update candidate' action. If there is one form with this action, the relevant form will immediately open. If there are multiple forms, an intermediate page will appear so you can choose which form you want to complete. After you have made this choice, the relevant form will open. Fields in this form that are linked to database fields are automatically filled in based on the relevant candidate.

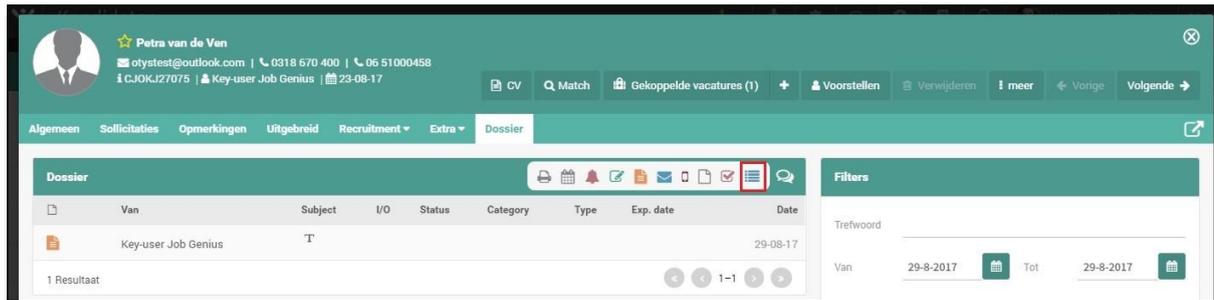


Fig. 11 – Update the interaction form from a candidate file

You can complete the form and click on the 'Save and close' button in the top right corner. After clicking on this button, the system checks whether there are any mandatory and/or recommended fields (see Section 3.4). If this is the case, an (error) message will appear. After all required fields have been completed and you have clicked the 'Save and close' button again, the candidate will be updated based on the linked database fields.

You can find the form containing both the fields that are linked to database fields and the fields that are not linked to database fields in the candidate's file. You can still change the form here or generate a PDF based on the completed form.

### 4.3 CREATE NEW VACANCY IN GO!

You can use an interaction form in OTYS Go! to create a new vacancy. This allows you, for example, to ensure that vacancies are created in a simple and consistent way in your system.

To do this, set the action of the form to 'Create vacancy' (see Section 3.2). If you then click on the 'Add' icon in the Vacancy Module, you will see an extra option 'Via form'. If you hover your mouse over this option, the forms with the action 'Create vacancy' will be displayed on the right. After you have clicked on the correct form, the form will open. You can complete the form and click on the 'Save and close' button in the top right corner.

After clicking on this button, the system checks whether there are any mandatory and/or recommended fields (see Section 3.4). If this is the case, an (error) message will appear. After all required fields have been completed and you have clicked the 'Save and close' button again, the vacancy will be created based on the linked database fields.

You can find the form containing both the fields that are linked to database fields and the fields not linked to database fields in the vacancy file. You can still change the form here or generate a PDF based on the completed form.

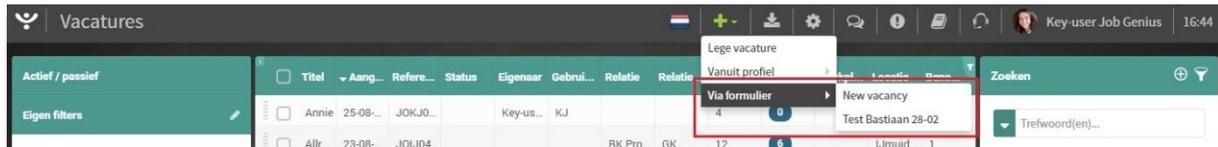


Fig. 12 – New vacancy via the interaction form

#### 4.4 EDIT EXISTING VACANCY IN GO!

You can also use an interaction form in OTYS Go! to update an existing vacancy. This allows you, for example, to ensure that 'the right questions' are asked during a vacancy intake with a client, so you have the right information to find candidates.

To do this, set the action of the form to 'Update vacancy' (see Section 3.2). If you subsequently click on the 'New interaction form' icon in the vacancy file, the system will check whether there are one or more forms with the 'Update vacancy' action. If there is one form with this action, the system will immediately open the relevant form. If there are multiple forms, the system will show an intermediate page so you can choose which form you want to complete. After you have made this choice, the relevant form will open. In this form, fields that are linked to database fields will be automatically filled in based on the relevant vacancy.

You can complete the form and click on the 'Save and close' button in the top right corner. After clicking on this button, the system checks whether there are any mandatory and/or recommended fields (see Section 3.4). If this is the case, an (error) message will appear. After all required fields have been completed and you have clicked the 'Save and close' button again, the vacancy will be updated based on the linked database fields.

You can find the form containing both the fields that are linked to database fields and the fields not linked to database fields in the vacancy file. You can still change the form here or generate a PDF based on the completed form.

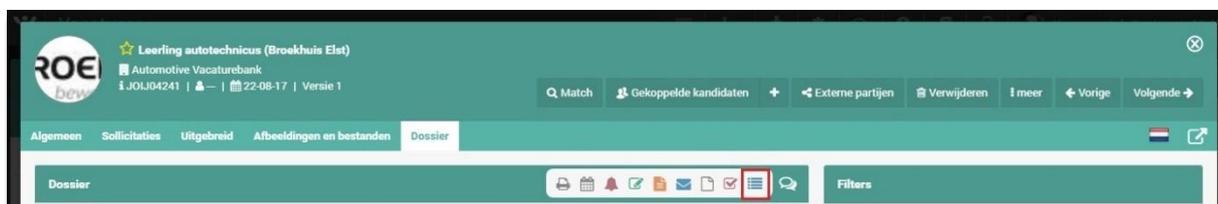


Fig. 13 - Update existing vacancy from an interaction form

## 4.5 CREATE A NEW CLIENT IN GO!

You can use an interaction form in OTYS Go! to create a new client. This allows you for example, to ensure that clients are created in a simple and consistent way in your system.

To do this, set the action of the form to 'Create client' (see Section 3.2). If you then click on the 'Add' icon in the CRM Module, you will see an extra option 'Via form'. If you hover your mouse over this option, the forms with the action 'Create client' will be displayed on the right. After you have clicked on the correct form, the form will open. You can complete the form and click on the 'Save and close' button in the top right corner.

After clicking on this button, the system checks whether there are any mandatory and/or recommended fields (see Section 3.4). If this is the case, an (error) message will appear. After all required fields have been completed and you have clicked the 'Save and close' button again, the client will be created based on the linked database fields.

You can find the form containing both the fields that are linked to database fields and the fields not linked to database fields in the client file. You can still change the form here or generate a PDF based on the completed form.



Fig. 14 – New client via the interaction form

## 4.6 EDIT EXISTING CLIENT IN GO!

You can also use an interaction form in OTYS Go! to update an existing client. This allows you for example, to fill in a form during a verification action in your CRM to ensure that your client's details are complete and up-to-date.

To do this, set the action of the form to 'Update client' (see Section 3.2). If you subsequently click on the 'New interaction form' icon in the client file, the system will check whether there are one or more forms with the 'Update client' action. If there is one form with this action, the system will immediately open the relevant form. If there are multiple forms, the system will show an intermediate page so you can choose which form you want to complete. After you have made this choice, the relevant form will open. In this form, fields that are linked to database fields will be automatically filled in based on the relevant client.

You can complete the form and click on the 'Save and close' button in the top right corner. After clicking on this button, the system checks whether there are any mandatory and/or recommended fields (see Section 3.4). If this is the case, an (error) message will appear. After all required fields have been completed and you have clicked the 'Save and close' button again, the client will be updated based on the linked database fields.

You can find the form containing both the fields that are linked to database fields and the fields not linked to database fields in the client file. You can still change the form here or generate a PDF based on the completed form.

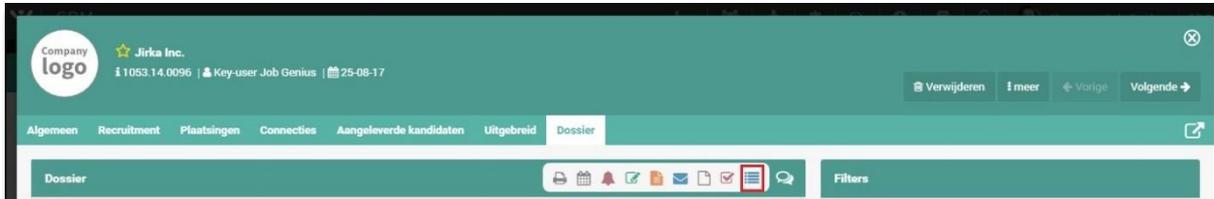


Fig. 15 - Update existing vacancy from an interaction form

## 4.7 FORM ON YOUR WEBSITE

You can also publish forms on your website. The simplest type of form is a contact form. To do this, set the action to 'Send email' (see Section 3.2). In this case, it is not possible to link database fields to the form fields. After you have further configured the form, you can publish a page in the CMS module with the 'Interactions' module selected. You can then indicate which form should be used on this page and to which email address completed forms should be sent. In addition to contact forms, you can for example, also publish questionnaires or requests for white papers on your website in this same way.

It is also possible to use other actions with forms on your website. For example, the action 'Create vacancy' where the completed form automatically becomes a vacancy in your database. If you want to further optimise your processes in this way, please contact us to discuss your wishes and the relevant options.

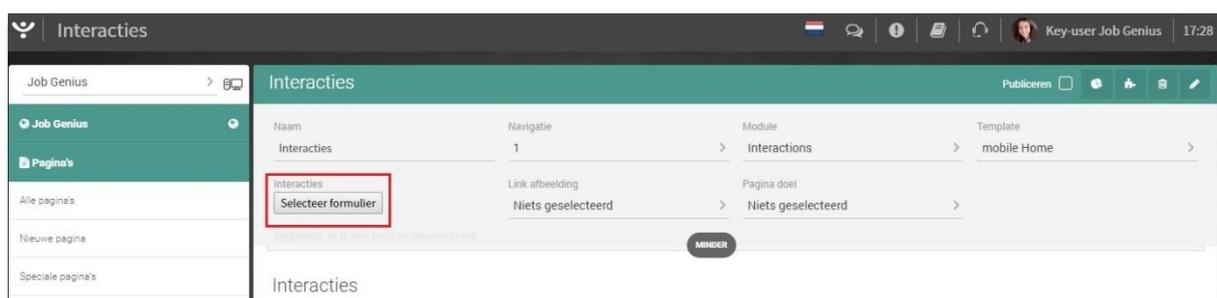


Fig. 16 - Interaction form on your website

#### 4.8 GENERATE FORM IN WORKFLOW

It is also possible to generate forms in a workflow. This allows you, for example, to ensure that an evaluation form is sent to a candidate in response to an intake. In this form, the candidate can check their details that are included in the database (and make changes where necessary) and answer any additional questions. If you want to further optimise your processes in this way, please contact us to discuss your wishes and the relevant options.