CALENDAR MODULE

INSTRUCTION MANUAL

OTYS Recruiting Technology

CONTENT

1 | ABOUT THE CALENDAR MODULE

1.1   INTRODUCTION

The calendar is an essential component in creating a restful work environment. The OTYS Calendar module ensures that you can easily schedule your day, and it is clear at a glance what appointments you have, who will be present, where the appointments take place and what facilities are needed. The OTYS Calendar module is web-based and therefore always accessible. Entered items are automatically synchronised with your computer, phone or tablet and with the invitee, so an appointment only has to be entered once. In this way everyone has the same date, time and place in their calendars to avoid unpleasant surprises.

These functions are not only available for internal use, but can also be used to make appointments with your candidates. The Calendar module can be linked to the candidate database and your email so that you can easily schedule appointments with the relevant persons. For example, you schedule a job interview in your own calendar and select the person you want to invite. The candidate will receive an invitation in their inbox and this will immediately be entered into in their calendar once the invitation has been accepted.

This and all other Calendar module functions are covered in detail in the instruction manual.

1.2   INSTRUCTION OBJECTIVE

These instructions are intended for OTYS clients, to enable them to configure and use the OTYS Go! Calendar module. You will learn how to use the calendar internally, to organise your work and how it is linked to your database so that you can also use the calendar externally for candidate contact.

1.3   INSTRUCTION STRUCTURE

After this introduction we will explain the available functions and possible actions you can execute in the Calendar module:

- Calendar view
- Calendar management

2 | CALENDAR VIEW

2.1 INTRODUCTION

Everyone has a personal preference for a calendar display. Whether you opt for a view by day or by month, the display layout remains the same. In this chapter you will learn:

- How to change the view;
- How to navigate the calendar;
- How to access the calendar of other users;
- How to authorise users to access your calendar;
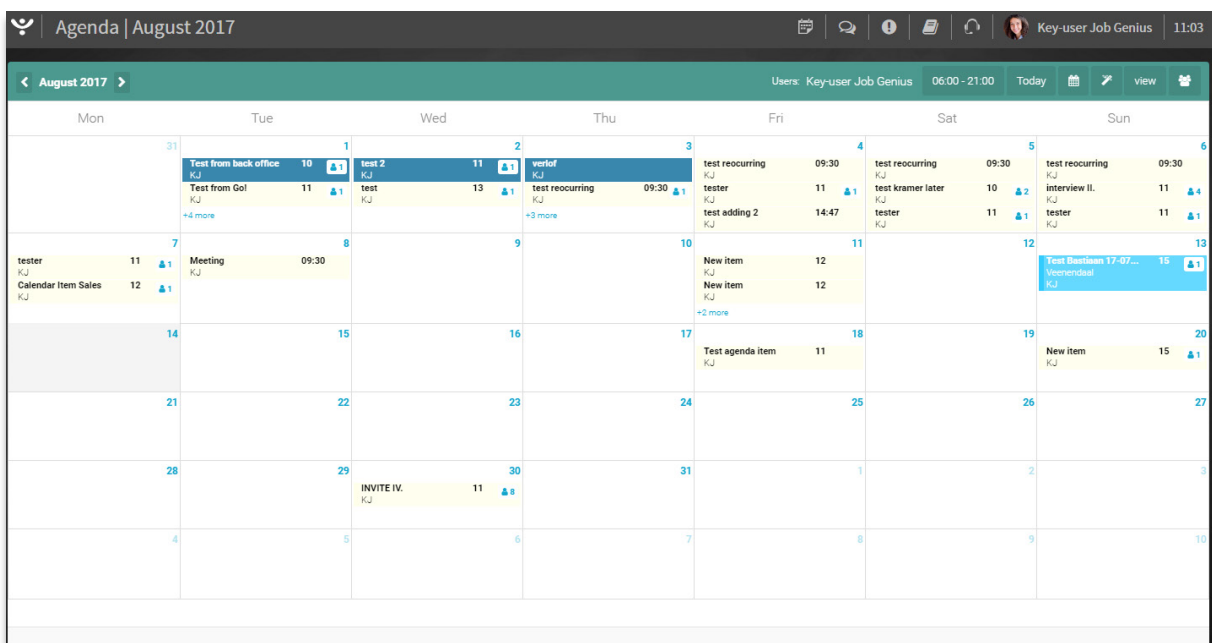- View of absent users.

Fig. 1 - Example of view by month in the Calendar module.

2.2 CHANGE VIEW

Within the Calendar module you can choose from different views. These are further explained below.

View by day
The view by day gives you an overview of the entire working day. The number of hours you want to see can be set manually, see section 2.3. The view by day gives you detailed information about the content of your calendar for that particular day.

View by work week
The view by work week gives you an overview from Monday to Friday. This gives you a broader

overview of tasks than the view by day. The view by work week is ideal if you are not using the calendar for private use over the weekend, for example.

View by week

The view by week is not much different from the view by work week. The difference lies in the fact that the weekend is included in this view. This view allows you to include items in the calendar that fall outside the regular work week.

View by month

Do you prefer an even broader overview? Then you can choose an overview for the entire month. Can be useful if you need extra preparation time for an important appointment.

Schedule view

The Schedule view gives you a view by day of your colleagues' calendars, one below the other. In this view, you will see at a glance what items are scheduled for your colleagues in their calendars and whether these overlap. This view allows you to immediately see when a joint appointment can be scheduled. It is also possible to drag calendar items to another colleague. This is ideal if your colleague is suddenly absent and, for example, you want another colleague to take their place at a job interview.

Compact view

With the compact view you can quickly find an item in a specific time period in your calendar. You will set the start and end date and search with keywords that should return search results.

You choose the view that is most suitable for you. To change the view, follow these steps.

1. In the options window in the right top corner of your screen, click 'View'.
2. A drop-down menu will open where you have the option to change the view as mentioned above.
3. Click on the desired view. The calendar will update automatically to your choice.

Fig. 2 - Change view

2.3 CHANGE TIME DISPLAY

The calendar has a standard time display that you can easily customise to your working hours.

1. Click on the time display in the options window in the top right corner of your screen.

2. In the drop-down menu that will open, you can change the start and end times of your calendar view. Click on 'From' to select a start time, click on 'To' to set an end time.
3. The calendar will adjust automatically.

Fig. 3 - Change time display.

2.4 NAVIGATE THE CALENDAR

In the top left corner of your screen you will find the navigation window for the calendar.

Fig. 4 - Navigate the calendar.

With the arrow to the left, you can view calendar items in the past, with the arrow to the right you can search for events in the future and schedule. Depending on your view you can navigate through your calendar in different ways:

- View by day
  You navigate through your calendar by day;
- View by work week
  You navigate through your calendar by week number **without** a view of weekends;
- View by week
  You navigate through your calendar by week number **with** a view of weekends;
- View by month
  You navigate through your calendar by month;
- Schedule view
  You navigate through your calendar by day showing scheduled times for calendar items;
- Compact view
  You will get a compact view by month showing all items that are scheduled, with any details that have been added (date, time, persons present, etc.).

Another option to navigate through the calendar is by clicking the Calendar icon in the options window in the top right corner of your screen.

1. Click on the calendar.
2. A view by month opens below the symbol.

3. Quickly navigate through the months. Days with an appointment are displayed in colour.

Fig. 5 - Navigate using the Calendar icon.

Once you've finished navigating through the calendar, you can go directly to today by clicking 'Today' in the options window in the top right corner of your screen.

Fig. 6 - Return to the current date.

2.4.1 COMPACT VIEW

The compact view provides additional functionality not available in other views. The screen 'Filters' that is displayed on the right allows you to search for specific appointments. You can do this in several ways:

- Search by keyword
  Click 'Keyword' and type the keyword you want to search for. Then press enter or click '+ Search' at the bottom of the screen and all appointments containing your keyword will be displayed.
- Search by date

  Click the Calendar symbol and then select a start and end date for your search. Then click '+ Search' to display the specified appointments.
- Search by type
  You can select items by type of appointment, or any item type that you have personally set. Under 'Types' click 'Select types...'. In the drop-down menu that will open, select the type of item or appointment. Then click '+ Search' to apply the filter. More information on how to personally assign types can be found further on in this manual.

You can reset all filters by clicking the orange cross next to '+ Search'.

2.5 ACCESS ANOTHER USER'S CALENDAR

You can not only see your own calendar but also the calendars of those who have given you authorisation to access theirs. More explanation about giving other users access to your calendar can be found further on in this manual.

To access the calendar of another user, follow these steps:

1. Click 'Users' in the options window in the top right corner of your screen.
2. A drop-down menu will appear with your name, the main user. Use the arrow to the right of your name to open the drop-down menu further, and you will be given the choice of selecting the user who has given you access to their calendar. Click on the user name or type the name into the text box above the list of users. To select all users, click on the open square in the text field. To deselect all users, click on the cross next to the open square.
3. If you select a user, their calendar items are automatically loaded into your calendar.

Fig. 7 - Select those users whose calendar you want to access.

2.5.1 GROUP USERS

If you want to access the calendars of specific users, such as direct colleagues, you can group them in OTYS Go!

1. Click in the options window in the top right corner of your screen on the symbol for multiple persons on the right of the bar.
2. You can add a temporary group or add a group for long-term use. Click on one of the two options and give your group a name. Now add the users to whose calendars you have access. The temporary group is suitable if you want to create a one-off group, 'Add group' is used to create a group of users that you use regularly. This function enables you to quickly schedule items on the calendar of several colleagues simultaneously, while you only need to create one item.
3. Save the changes and get an insight into the calendars of your group by clicking the 'Users' field.

Fig. 8 - Create user groups.

2.6 AUTHORISE USERS

You have to authorise those users who require access to your calendar. This option is not available in the Calendar module, but must be activated in the OTYS Go! user settings.

1. You click on your name in the top right corner of the screen (any screen when you are logged into OTYS Go!) and choose 'User settings'.
2. In the overview 'Calendar', select the tab 'Rights' and click 'Calendar authorisations'.
3. A field of options will open in which you can add or remove users. You can also indicate whether the relevant user can access your private items.
4. Click 'Save' The settings are now saved.

Other users must first give their authorisation before you can access their calendars. You cannot do this yourself.

2.7 VIEW OF ABSENT COLLEAGUES

The Calendar module shows which colleagues are not present. This allows you to quickly see which users are not available if you want to schedule an item. The absent colleagues are displayed **under** the calendar overview, irrespective of which view you are using. The display of absent users is limited to those who have given you authorisation to access their calendars and is based on the calendar item type 'Leave'.

3 | CALENDAR MANAGEMENT

3.1 INTRODUCTION

In the previous chapter we showed you how to navigate through your calendar. This chapter explains how to create a calendar item in OTYS Go!

This chapter is divided into several sections:

- Add a calendar item
- Move an item/appointment
- Set type of item/appointment
- Calendar Option Wizard (COW)

3.2 ADD A CALENDAR ITEM

You easily create a new calendar item by clicking once on the day in the calendar view in which the item must be scheduled. A new item will open automatically that will allow you to specify your appointment.

A second way to add a calendar item is by dragging within your calendar. Creating an item is simple:

1. Hold your left mouse button and drag up or down until you reach the desired duration.
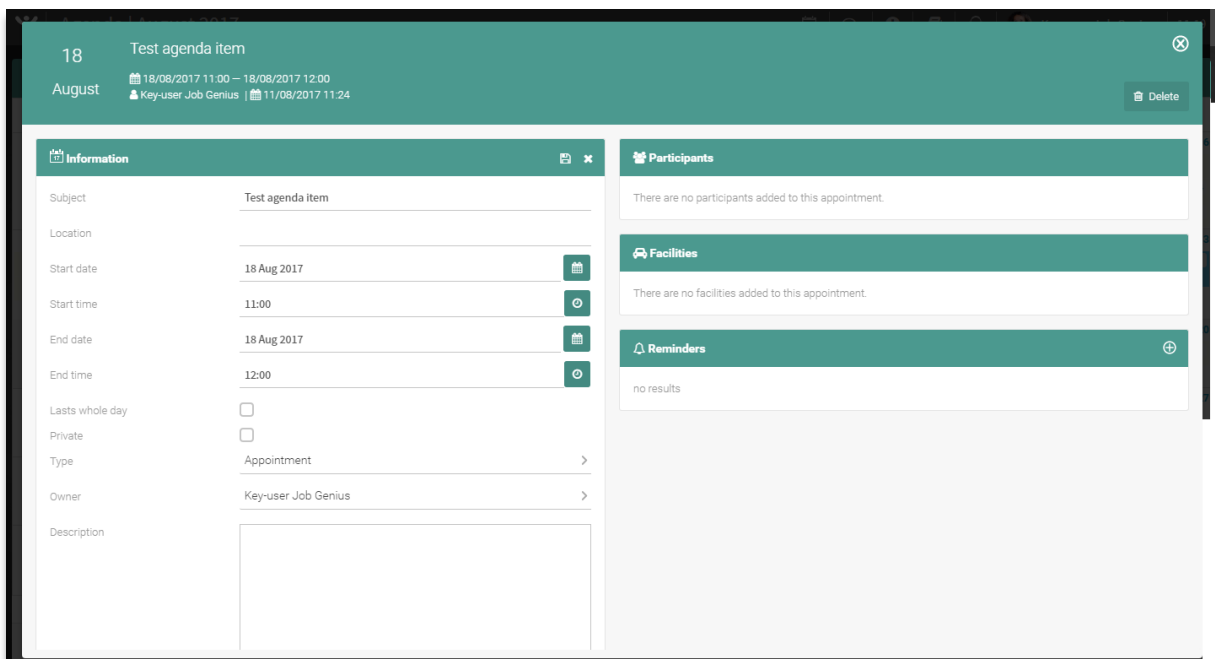2. Release the left mouse button and enter your appointment as further explained in the chapter.

Fig. 9 - Overview of a new calendar item.

3.2.1 ADD INFORMATION TO A CALENDAR ITEM

You can add information to the item, as shown in fig. 9, by taking the following steps:

1. Enter the subject by clicking on 'New item'. This text will disappear so that you can assign a subject to your item.
2. At 'Location', add where the event will take place.
3. The start and end date can be set by clicking the date that was already entered, or by clicking on the Calendar icon. The date entered is the date you have selected in the display. After clicking on the date or on the calendar, a larger view of the calendar will open. Here you can click on the desired date.
4. The start and end times can be set by clicking on the time or on the clock symbol. You can set the hours and minutes using the up and down arrows. The minutes are set per 15 minutes. You can also set the time by clicking on the time and entering it manually.
5. Tick the box 'Lasts all day' to schedule the item for a whole day in your calendar. By not ticking this you can reserve a part of the day for the appointment.
6. Tick the box 'Private' to conceal the appointment to other users. Only you have the right to view the item.
7. The type of item can be set at 'Type.' You can find more information on how to create types of items in section 3.4.
8. You assign an administrator of the calendar item at 'Owner'.
9. You can add a description in the open text field 'Description'.
10. Finally, you can specify the travel time to and from an appointment. This is done in the same way as explained under point 4.
11. Save the changes by clicking on the Disk icon on the bar. Click the cross to cancel your changes.

3.2.2 INVITEES

OTYS Go! allows you to quickly add more people to a calendar item:
1. Click the pencil that appears when you hover your cursor over the bar 'Invitees'.
2. Select a name or type (part of) a name to enter the appointment in the calendar of the relevant person.
3. Tick the option 'Send email' if you want the invitee to receive a notification and be obliged to accept the item.
4. Save the changes by clicking on the Disk icon on the bar. Click the cross to cancel your changes.

3.2.3 FACILITIES

For certain appointments it is useful if you can use additional items that you do not immediately have at hand. Think of a meeting room, a projector, a whiteboard, etc. By booking these facilities in your calendar, you prevent another colleague from using them at a time when you need them.

You can add facilities for your item in the same way as invitees.

1. Click the pencil that appears when you move the cursor over the bar 'Facilities'.
2. Select your required facilities.
3. Save the changes by clicking on the Disk icon on the bar. Click the cross to cancel your changes.

3.2.4 REMINDERS

To prevent you forgetting a calendar item, you can set a reminder.

1. Click '+' in the bar 'Reminders'.
2. Enter the subject, date and time in the same way as explained before. Select the user you need to send a reminder to.
3. Tick the box 'Mobile notification' if you want to receive a reminder on your mobile phone (if you are using the OTYS Calendar app from the Google Play Store or iTunes App Store). Tick the box 'SMS only' if you want to receive a reminder text message.
4. Add a personal description to the reminder.
5. Click 'Save' to activate the reminder.

You can edit all the fields by clicking the pencil icon again. The appointment is saved automatically so you do not have to click 'Save'. You can exit the screen by clicking the cross in the top right corner. The item can be accessed by clicking it and then clicking 'Open'. You can then delete the item by clicking 'Delete' in the upper right corner of the screen.

3.3 MOVE AN ITEM/APPOINTMENT

An item or appointment can be easily moved to another time by dragging it to the desired day and time.

1. Select the View by day or Schedule view to move the item to a different time on the same day. Select View by week, work week, or month to drag it to a different day or month.
2. Click on the item, hold your left mouse button and drag the item to the new situation. The item will automatically be saved when you release the mouse button.
3. The length of an item can be changed quickly by moving the cursor over the item until the '=' sign appears in the item and the cursor changes into a vertical line with an arrow above and below. Now change the duration by dragging the item down or up.

The Schedule view is used to quickly move an item to another colleague.

1. Select Schedule view as explained in section 2.2.
2. Select the users whose calendars you want to access, see section 2.5.

3. The calendars of the selected users will be displayed one below the other. Click on a calendar item and drag it to the calendar of another user.
4. The item is automatically saved in the calendar of your colleague. All invitees of the calendar item will automatically receive an email with information about the amended appointment.

3.4 SET TYPE OF ITEM/APPOINTMENT

You can classify items or appointments into different types of item or appointment. Use this function to give your item or appointment a name so that it is immediately clear what type of item it is. You can see at a glance whether you have an online appointment, an outside appointment or a training session. Here's how to set the type of appointment:

1. Click on your name in the top right corner of your screen and then click 'Client settings'.
2. Go to 'Set without category' or search by keyword 'Type'.
3. Click 'Calendar item type' (Code GE82).
4. A new window will open. Click 'Add' to set a specific type of calendar item.

3.5 CALENDAR OPTIONS WIZARD

The COW function can be recognised by the magic wand in the options window in the top right corner of your screen. COW is designed to automate the creation of internal and external appointments. By taking into account the calendar of the OTYS user(s), and offering options to external parties via the OTYS website, scheduling calendar appointments can be done very efficiently. Because of the comprehensive options of this function it is not discussed here, but you can find it in the separate COW instruction manual.