



CANDIDATES MODULE

INSTRUCTION MANUAL



OTYS Recruiting Technology



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1 | INTRODUCTION

1.1 ABOUT THE CANDIDATES MODULE

The OTYS Candidates module is the central place to manage all candidates. Here you keep track of all the responses you receive to your vacancies, and you add new candidates that reach out to you, for example by telephone or via an unsolicited application. Using the Candidates module you build candidate dossiers and collect information so that - when the time is right - you can make that perfect match of candidate and vacancy. Through handy filters and search functions you will quickly find the right set of candidates and match them either one at a time or in batch to the right vacancy.

1.2 PURPOSE OF THIS INSTRUCTION

To match the best candidates to the right vacancies. This is the core business of many. A process that hinges on information. Based on this information you decide whether you are going to propose the candidate to the client or not. How to handle all this information in the best way, where to store it and how to use OTYS to make the best match; read all about it in this instruction manual for the Candidates module.

1.3 INSTRUCTION STRUCTURE

This instruction manual starts with an introductory chapter that describes the added value of the Candidates module in Go! Next, the functionality of the module is discussed in detail.

A distinction is made between:

- Basic functions
- Enter candidate details
- Execute actions on one candidate
- Execute actions on multiple candidates

2 | BASIC FUNCTIONS

2.1 SEARCH AND FILTER

To be able to find the right candidate in your system you can use the extensive OTYS Go! filter and search functionality. The Search functionality is located in the right panel of your screen. Here you can add multiple criteria to get the right result. If you want to use this combination of search criteria again, you can save the search as a filter. The filter can then be found in the left panel of the screen and allows you to execute your saved search again at a later time with one click. How these functions can be best used is described in the instruction manual 'Lists, search & match in Go!'. We decided to describe this functionality in a separate instruction manual because its operation is the same for multiple modules in OTYS.

2.2 ADJUST YOUR LIST VIEW

Do you often work with the Candidates module and want to customise the columns in the overview? This can be done by clicking on 'Standard view' at the bottom of your screen. Here you can add, delete and rearrange columns. You simply save your new view for future use. How to leverage this function is described in the instruction manual 'Lists, search & match in Go!'.

2.3 CREATE A NEW CANDIDATE

When a new candidate contacts you, for example by telephone, you can easily create a new candidate from the candidates overview. There are two ways to do this:

1. Add new blank candidate
This function starts a new blank candidate and you can immediately enter all the available details. You do this by clicking the green '+' symbol at the top of your screen.
2. Add new candidate from a form
This option lets you add candidate details from a predefined form. You can compose a form containing those fields that your colleagues should complete when creating a new candidate. This option is fast and ensures consistency in your database.

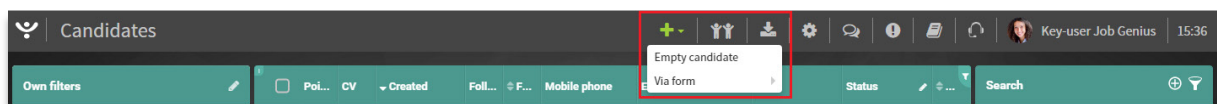


Fig. 1 - Create a new candidate

2.4 ADD OR CHANGE CANDIDATE PHOTO

When creating a new candidate, by default you will see an image in the space for a passport picture in the upper left corner of your window. To add a photo of the candidate, take the following steps:

1. Click on the image in the top left corner of the candidate detail screen.
2. Click 'Change photo'.
3. Select a photo from your computer or laptop.
4. Crop the photo if necessary.
5. Click 'Save image'.

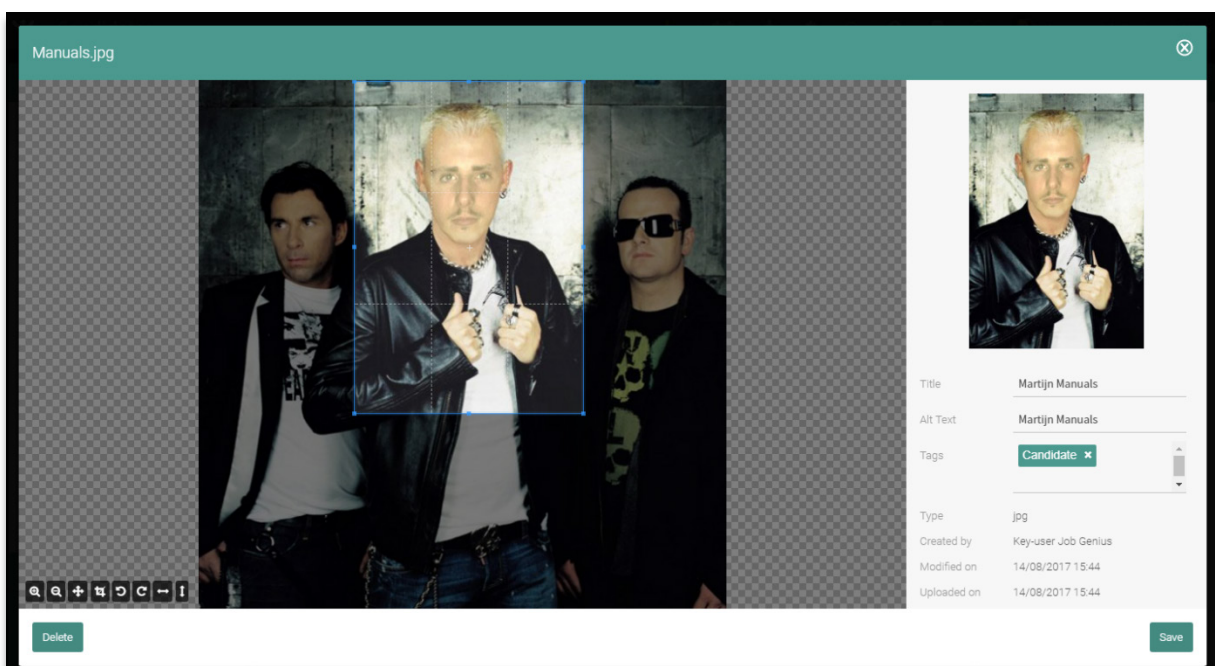


Fig. 2 - Add or change candidate photo

3 | ENTER CANDIDATE DETAILS

Professional fields are all different and the same applies to recruiters. You are the only one who can determine what information is relevant to you. In addition, everyone prefers their own working method, and OTYS wants to facilitate that. To give you as much control as possible over your candidate database, we have made the complete layout and contents of the detail screens adaptable. You can decide for yourself what information is relevant to you and what you want to display. In addition, you can decide what information will be displayed where and on which tab. We did this by placing the information in a variety of widgets. For example, the widget 'Availability' that stores candidate availability information. Is the availability of a candidate very important to you, then you can retrieve that information easily by placing the appropriate widget at the top of the first tab. So you see this immediately when you open a candidate. The instruction manual 'Detail views!' helps you to optimally set up your own detail screens.

Of course you can also use the default view set by us. We have done our best to arrange it as logically as possible. It allows you to start immediately.

If you, in the detail screen of a candidate, hover over the green bar of a widget, a pencil will appear in the upper right corner. Click to edit the information in the widget. Then click on the Disc icon in the top right corner to save your changes. This works the same for all widgets.

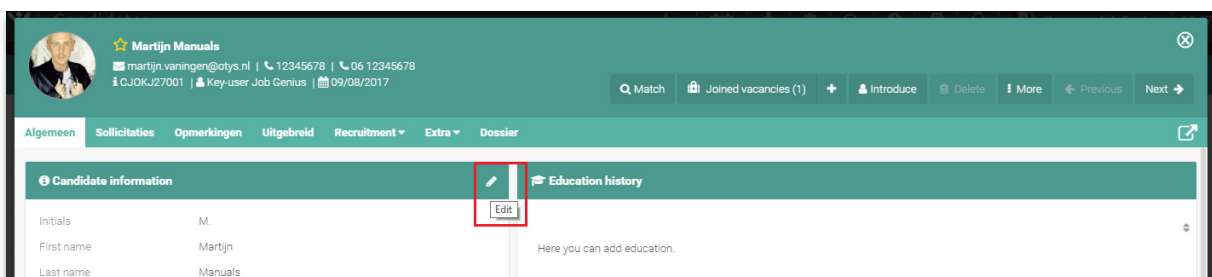


Fig. 3 - Edit candidate information in the detail screen

To cover all the relevant candidate information, the following widgets are available:

- **Anti-spam settings**
Use this option to specify whether a candidate can receive bulk mail. If you disable the bulk mail option a candidate will, for example, not receive commercial mail, even if they are added to a mail group at a later stage.
- **Bank and insurance**
Enter e.g. IBAN, VAT or citizen service number (BSN) of the candidate.
- **Availability**
Enter when a candidate is available and whether there is a period of notice.
- **Calculations**
Add any calculations related to working weekends or overtime.

- Social networks
Enter the candidate's social media profiles such as LinkedIn, Facebook or Twitter.
- Competencies
Enter specific competencies and any certificates, e.g. whether a person is officially Google Certified.
- Computer skills
Does your candidate have any special computer skills or experience with certain software that is relevant to the vacancy? Add it here.
- Connections lists
Make connections with other contacts or candidates in your database.
- Contracts
Add information about the current contract of the candidate here.
- Extra dates
For example, to enter the date of a first intake or follow-up appointment.
- Dossier
Here you find the candidate's complete dossier. All emails, calendar appointments, notes, but also documents as well as CVs are displayed here and can be added here. With filters and keywords you can determine which items are displayed. To leverage the full function of the Dossier, it is best to read the instruction manual 'Dossiers'.
- Email aliases
If you have multiple email addresses, such as a private email address of a candidate, you add it here.
- Extra fields
Here you enter all the information which is not specifically covered by any of the other widgets. E.g. whether you want to send a Christmas card to the candidate at the end of the year. When sending, you can make a selection based on this field.
- Congratulatory moments
Birthdays, anniversaries and other moments that you can use to reach out to a candidate can be saved here.
- Freelance/interim
Enter whether the candidate is working freelance or on a temporary basis.
- Hobbies
Do you want to score points with your candidate? Then record their hobbies here, and refer to them at a later stage.
- Cards and licences
For example, do you have a copy of the passport or driving licence of the candidate? Then you can save it here so that at a later stage, perhaps years later, you don't have to ask again.
- Deductions
Here you can enter deductions, such as a contribution for a laptop or mobile phone.
- Candidate information
Enter the candidate's basic information here. It is also possible to temporarily make your client inactive here.

- Candidate holiday hours
Add any candidate holidays here, so you know when you don't need to bother them.
- Short description
This is an open text box where you can add a brief description of the candidate. This is intended as an internal memo in which you can share your feelings or opinion on a candidate.
- Lease cars
Does the candidate have a current lease contract and for how long? You can record this in this widget.
- Suppliers
Here, you can enter the person who introduced the candidate.
- Match criteria
Add match criteria to the candidate, such as education level, work experience and desired number of working hours. If you have set the same match criteria for vacancies, you can have OTYS automatically match this candidate to the right vacancy.
- Motivation
Please enter the motivation given by the candidate here.
- Education history
Enter the educational background of your candidate here.
- Comments
Add any comments, for example on work experience, the position, or the motivation letter from the candidate here. This is intended for internal purposes.
- Other information
Add any information that is not covered by other widgets here. For example, whether the candidate is willing to relocate, or whether they possess a car or driving licence.
- Pension
Practical pension information, such as the bank account number and policy number can be entered here.
- Period items
This widget gives an overview of the periods that the candidate indicated to be available. This is an overview widget, which means that you cannot customise this widget using the pencil.
- Soft skills
Enter the candidate's more personal skills. For example, communication or leadership skills. Also add whether a candidate is practical, studious or has a sense of humour.
- Assignments list
The assignments widget provides an overview of the assignments of the candidate. This includes the current assignment but can also include companies where they have worked in the past through your company. Here you can see the start and end dates of the assignments.
- Procedures
Here you will find the vacancies that are currently linked to this candidate.

- Publication
To publish your candidate on your website as a job seeker, you need the permission of the candidate and the recruiter. In the field Publications you can tick that both recruiter and candidate are in agreement. If both boxes are ticked, the candidate is placed on your website. If you have multiple websites, you can indicate in the widget 'Show on website' which of your sites should feature the candidate.
- References
You asked your candidate for references in respect of a certain position. This is where you can save them.
- Salary/costs
Use the Salary/expenses widget for all salary-related information. This includes monthly salary, hourly rate for, for example, self-employed persons without employees, and the period for which the salary is paid.
- Contractual savings
Does your candidate take part in a life cycle saving scheme? Then enter bank account information and policy number here.
- Language skills
The different languages and level of proficiency of your candidate can be entered here.
- Show on website
If you have multiple websites, use this widget to specify which site(s) should feature your candidate. You need prior permission from both candidate and recruiter. You can tick this in the widget 'Publications'. The candidate will only be published on the selected website when both boxes are ticked.
- UTM tags
With this widget you can indicate through which source, medium or campaign the candidate came to your notice.
- Compensations
If a candidate currently receives remunerations, for example for lunch, travel or the use of a mobile phone, you can enter this information here.
- Flight information
If your candidate frequently travels by air for their job, you can enter relevant information here. For example, whether they fly Economy or Business class.
- Employment history
Of course you want to record previous work experience of the candidate. Use this widget to store where, when and in what capacity the candidate worked elsewhere. The reason for termination of the employment contract and a description of the work can be entered here too.
- Work base location
Enter the regions in which your candidate would like to work. This allows you to make a pre-selection of the vacancies you want to propose to your candidate.
- Healthcare
Use this widget to record any information about the candidate's health insurance. This could

be relevant in respect of certain physical functions.

4 | EXECUTE ACTIONS ON ONE CANDIDATE

Besides adding information you can also execute certain actions on the candidate. These actions can be found below the buttons in the far right top corner of the candidate detail screen. Below we will discuss the various buttons and actions.

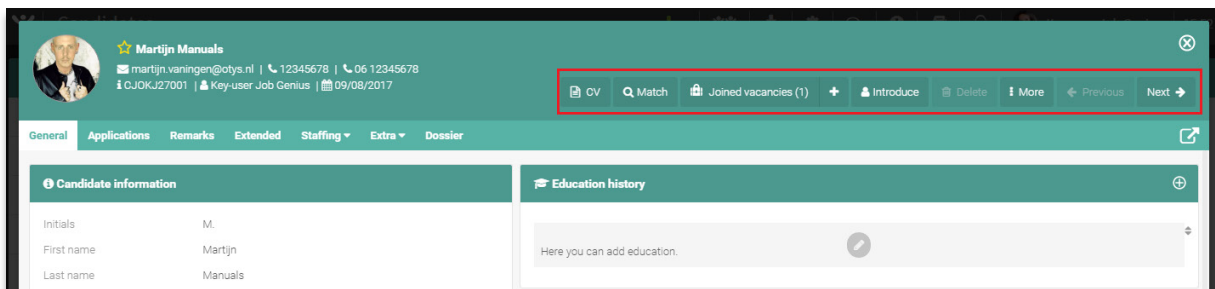


Fig. 4 - Execute actions on one candidate

- **CV**
This is a shortcut to download the CV of the candidate with one click. It automatically selects the latest version of the original CV of the candidate.
- **Match**
 - **Match to vacancies**
Use this button to see the overview of vacancies matched to your candidate based on the entered match criteria. You can always change this selection via the usual filter and search functionality. Then you right-click to match the vacancy to the candidate.
 - **Match to relations**
This feature works the same as Match to vacancies. However, the match will be made on the level of relations.
 - **Match to contacts**
This feature works the same as Match to vacancies. However, the match will be made on the level of contacts.
- **Joined vacancies**
Click this button to go to the overview of all the vacancies that are matched to this candidate.
 - '+'; use the plus button to match previously created vacancies to this candidate.
- **Introduce**
 - **Print CV**
This button lets you open the candidate's CV, print it, or send it by email in the format, layout or template of your choice.
 - **Online CV presentation**
This lets you send an email to your client with a link to an online version of the

candidate's CV. It is possible to adapt the layout of this CV to your corporate identity by selecting a template.

- Delete
Lets you delete a candidate. This means that you also delete all email correspondence and documents from the candidate. The system will ask for confirmation first.
- More
 - Manage web user
Create a login for your candidate for the candidates portal. This allows, for example, a candidate to adjust their profile and motivation.
 - Make Google folder
Perhaps you want to save files relating to your candidate on Google Drive. With this button, you can automatically create a folder on Google Drive, specifically for this candidate.
- Previous
Takes you to the previous candidate in your selection. If you made a selection based on a filter or search, this 'Previous' button will give a different result than when you arrived at this candidate from the total overview.
- Next
This button works the same way as the 'Previous' button. However, you then of course jump to the next candidate in your selection.

Under the described row with action buttons you find the 'Open in new window' button. This is especially useful if you want to quickly open multiple candidates side by side in different tabs in your browser.

5 | EXECUTE ACTIONS ON MULTIPLE CANDIDATES

The previously described actions all affected one candidate, but it can also happen that you want to edit multiple candidates. You can do this from the candidates list, both from the total overview or from a selection you made on the basis of the filter and search functionality.

1. Do this by ticking the boxes at the beginning of each line of the candidates you wish to include in your list.
2. Right-click your mouse on one of the selected candidates to see the available batch actions.
3. The batch action you select will apply to all selected candidates.

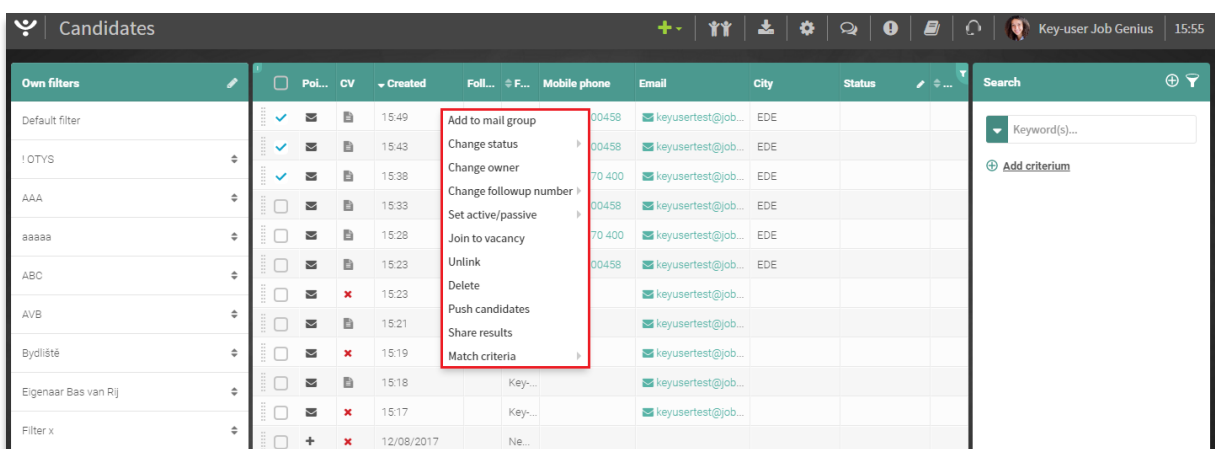


Fig. 5 - Execute an action on multiple candidates

The options are:

- **Add to mail group**
Simultaneously add multiple candidates to a previously created mail group. For example, a list to which you regularly send vacancies in a particular professional field.
- **Change status**
For example, change the status of multiple candidates from 'Contact' to 'Reject' simultaneously.
- **Change owner**
Assign candidates in bulk to a colleague.
- **Change followup number**
Use this function to give a rating or priority to candidates. For example, give all your top candidates a '1' rating to distinguish them easily and quickly from the rest.
- **Set active/passive**
Set multiple candidates simultaneously to active or passive.

- Join to vacancy
In the window that appears you can search the vacancy database for matching multiple candidates simultaneously.
- Unlink
Use this option if you want to unlink the selected candidates from all vacancies to which they are matched at that time.
- Delete
Select this option to simultaneously delete multiple candidates. The system will ask for confirmation.
- Push candidates
This option allows you to send multiple candidates to a colleague or other OTYS user via chat, for example.
- Share results
If you cannot find suitable candidates in your database via a search with multiple factors, you can send this set search via chat to another OTYS user. This user can then carry out this search on their database to see whether it generates a suitable candidate - with one click of a button.
- Match criteria
Use this function to simultaneously add or delete match criteria for multiple candidates.

