DETAIL VIEWS

INSTRUCTION MANUAL

OTYS Recruiting Technology

CONTENT

1 | INTRODUCTION

1.1   ABOUT DETAIL VIEWS IN OTYS GO!

When opening an item in your OTYS Go! system you will see a 'detail view'. This may be a candidate, a vacancy or a relation. The detail view shows you the item data you need (for example, the candidate data), you can edit these (for example, adding work experience) and you can undertake actions (for example, generate a CV of the candidate).

Most modules in OTYS Go! have a fixed detail view setup. This relates to the following detail views:

- Candidates
- Vacancies
- Relations
- Contacts
- Assignments
- Sales processes
- Calendar appointments
- Activities
- Tasks
- Timesheets
- Billing
- Interactions
- Newsletters
- UTS Manager

This setup is as follows:

- A detail view always opens in a full window in the current screen. This means you do not leave the existing module (which increases the speed of the work). So if you open a candidate from the dashboard, the candidate's details open in the dashboard.
- In the top bar of the detail view you see along the left side the basic information of the item you opened (e.g. name and status of the candidate), and on the right are buttons to execute an action on the item (e.g., generate a candidate's CV).
- A detail 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, different components are in sections (called widgets). There is, for example, a widget with vacancies that a candidate is matched to and a widget with the contacts of the relation. The 'dossier' is a widget too.

It is also possible to create your own layout for certain detail views (candidates, vacancies, relations, contacts, assignments and sales processes). You can therefore decide which tabs should make up a detail view, what the layout is per tab, which widgets will be used, and where. This allows you to give the important factors for your process a prominent place in your detail view. It is also possible to configure multiple detail views and to switch between detail views (depending on what you are working on).

As indicated, there is a standard detail view for most OTYS Go! modules. You can probably imagine that an SMS requires a different layout (and it is somewhat 'exaggerated' to open it in full screen). Other modules therefore have (specific) different detail views, in line with the relevant module.
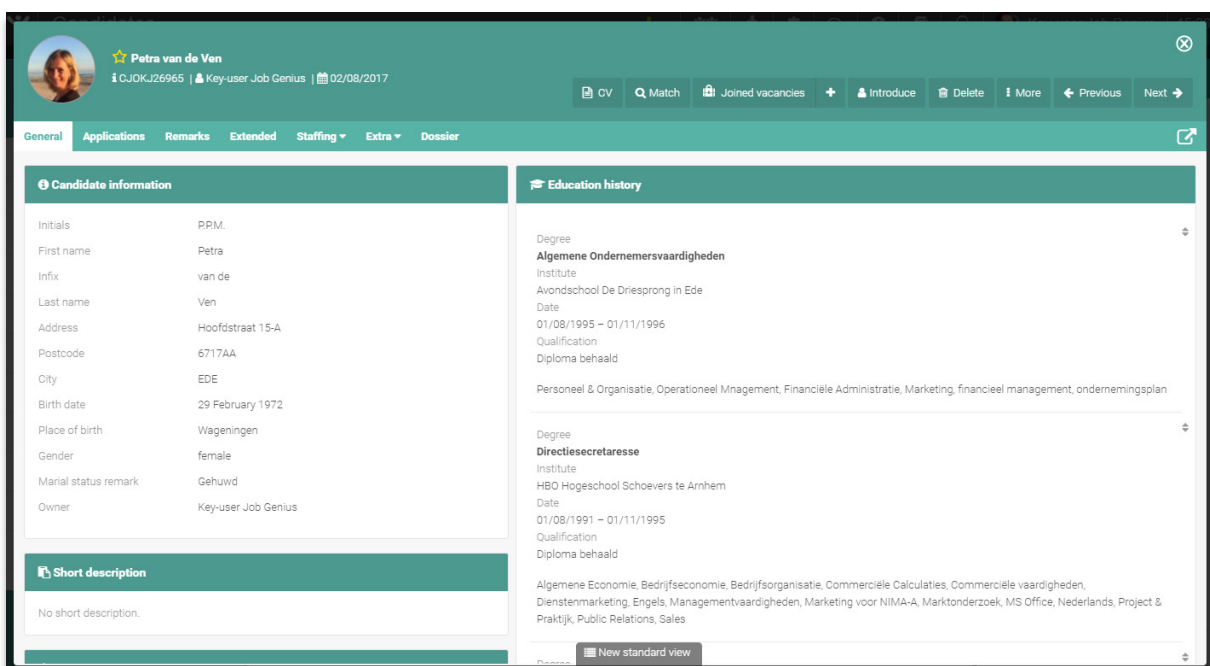

Fig. 1 - Example detail view

1.2 INSTRUCTION OBJECTIVE

These instructions are intended for OTYS clients, to enable them to use and configure detail views in OTYS Go! This instruction manual only focuses on the standard detail views that are available in most modules.

The different detail views are therefore not covered in this instruction manual; these are explained in the instruction manual of the relevant module.

1.3 INSTRUCTION STRUCTURE

After this introductory chapter, we will explain how to configure and use the standard detail views in OTYS Go! step by step. The remainder of this instruction manual is divided into two chapters:

- Configuration detail views
- Use detail views

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

2 | CONFIGURATION DETAIL VIEWS

2.1 INTRODUCTION

As previously stated, a detail view consists of three components:

- A detail view consists of several tabs, and (possibly) sub-tabs.
- Each tab has a specific layout (for example, two columns of the same width).
- Within this layout, there are different widgets with grouped data.

For the following entities it is currently possible to adjust the detail views to your preferences:

- Candidates
- Vacancies
- Relations
- Contacts
- Assignments
- Sales processes

The tabs, the layout of the tabs, and the widgets on the tabs are configurable per user. This allows you to create a view in which the main data can be displayed immediately and prominently. You can also create multiple views if you use a detail for different purposes (for example, a 'sales' relation detail and a 'recruitment' relation detail).

This chapter is further divided into three sections:

- Manage detail views
- Configure layout per tab
- Configure widgets per tab

In principle you only have to do this configuration once when you first start using your OTYS Go! system. It is also possible to adjust this configuration (temporarily), if this works better for you in a particular situation.

2.2 MANAGE DETAIL VIEWS

2.2.1 GENERAL

As stated above, you can create different detail views for different purposes. When creating a detail view you instantly determine the tabs that make up that view. You can then determine the layout per tab and place the widgets on the tabs.

2.2.2 CREATE NEW DETAIL VIEW

To create a new detail view, take the following steps:

1. Click at the bottom of the detail view for which you want to create a new detail view on the name of the detail view (usually the 'Standard view', but it can also have another name).
2. A window with all preconfigured detail views will open. Click on the 'New view' button in the bottom right corner of the window or click the 'Copy' icon next to an existing view to use this as a blueprint for your new view.
3. A window with the new view (which should still be configured) will appear:
   a. Enter a familiar name (to you) for the detail view at 'Name'. This might be your name or your company name, but also, for example, 'Candidates basic' or 'Candidates advanced' if you use multiple detail views.
   b. Tick 'Global view' if this view should also be available for your colleagues. If you do not do this, the view is exclusively for yourself.
   c. Then click the 'Add Tab' button to add a new (main) tab. An empty field will appear where you can enter the name of the tab. Repeat this step for all (main) tabs you want to add.
   d. If you want to add a sub-tab, click the Add icon to the right of a main tab. The first sub-tab will by default have the name of the main tab, but you can change this of course. Repeat this step for all sub-tabs you want to add.
   e. If you made a mistake while creating tabs, you can delete a tab by clicking on the Delete icon to the right of the tab. The tab will immediately be removed.
   f. If you want to rearrange the order of your tabs, you can adjust it with the Move icon on the right of a tab. Simply drag the tab to the right position. The tab at the top of this list will later appear on the far left in the actual view.
4. After you have set the above settings, click the 'Save' button.
5. To open the newly created view, click the newly created view in the list.

The detail view has now been created and opened. Obviously it is not yet configured any further. The next step is to determine the layout of the tab.
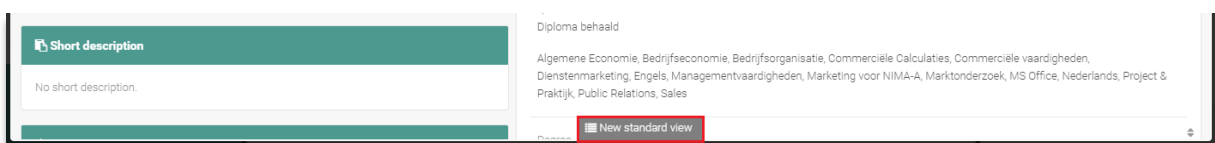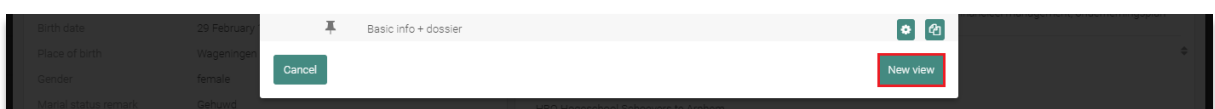

Fig. 2 - Open settings detail view
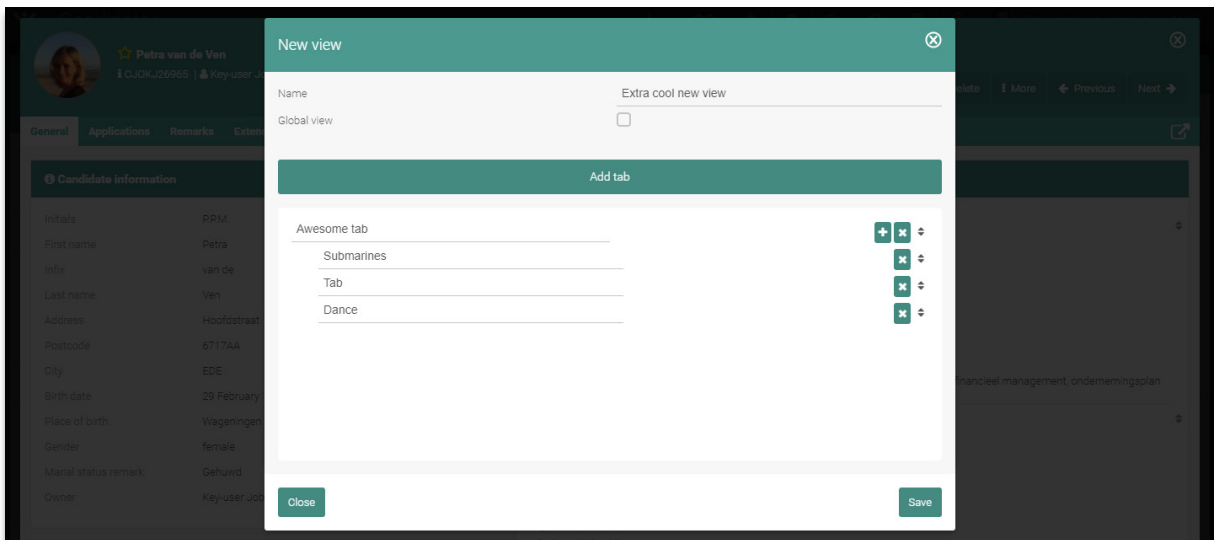

Fig. 3 - Create new detail view

Fig. 4 - Configure detail view

2.2.3 ADJUST EXISTING VIEW

To adjust an existing detail view, take the following steps:

1. Click at the bottom of the detail view you wish to adjust on the name of the detail view (usually the 'Standard view', but it can also have another name).
2. A window with all preconfigured detail views will open. Click the Configuration icon to the right of the detail view you want to adjust. It is not possible to adjust the standard view (from OTYS), therefore you do not see a Configuration icon next to this view.
3. A window with the view will open. Make changes to the detail view, as explained previously, then click 'Save'.
4. To open the newly created view, click the newly created view in the list.

The detail view has now been changed and opened. From here, it is possible to determine the layout of the tabs and to place widgets on the tabs, if necessary.
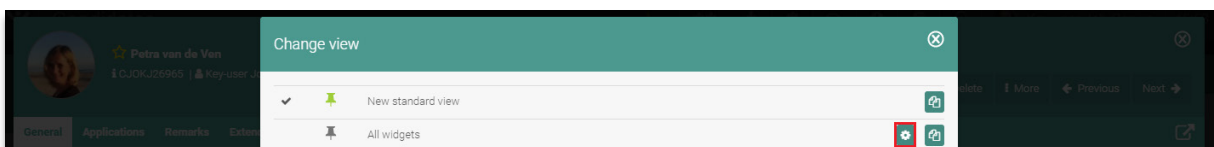

Fig. 5 - Adjust existing view

2.2.4 DELETE EXISTING VIEW

To delete an existing detail view, take the following steps:

1. Click at the bottom of the detail view you wish to delete on the name of the detail view (usually the 'Standard view', but it can also have another name).
2. A window with all preconfigured detail views will open. Click the Configuration icon to the right of the detail view you want to delete. It is not possible to delete the standard view (from OTYS), therefore you do not see a Configuration icon next to this view.
3. A window with the view will open. Click in the bottom left corner on the 'Delete' button to delete this view.
4. You will be asked to confirm. Click the 'Yes' button.
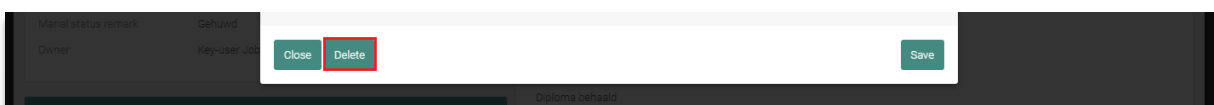
The detail view has now been removed.

Fig. 6 - Delete existing view

2.2.5 SET STANDARD VIEW

If you have created multiple detail views, you can set one detail view as 'standard'. This means that when you log into your OTYS Go! environment and open a particular detail, this standard detail view will be displayed. Setting your standard detail view is done with the following steps:

1. Click at the bottom of the detail view, of which you wish to change the standard detail view, on the name of the detail view (usually the 'Standard view', but it can also have another name).
2. To the left of the detail view that is currently set as standard, you will see an icon of a green drawing pin. Next to the other detail views is an icon of a grey drawing pin. Click the (grey) drawing pin icon next to the detail view you want to set as standard.
3. You will be asked to confirm. Click the 'Yes' button.

The selected detail view is now set as your standard view and will open automatically.
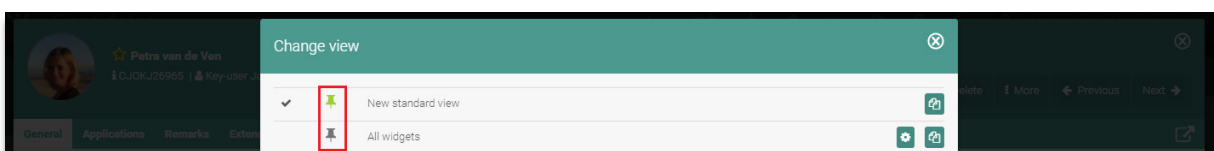

Fig. 7 - Set standard detail view

2.3 CONFIGURE LAYOUT PER TAB

After you have determined the basic structure of your detail views, you can give each tab a specific layout. At this moment, the following layouts are available:

- Two columns of equal width
- Three columns of equal width
- One column over the entire width with two columns of equal width underneath
- One column over the entire width with three columns of equal width underneath
- One column over the entire width
- A wider column (left) and a narrower column (right)
- A narrower column (left) and a narrower column (right)
- Two columns of equal width and one column over the entire width underneath, with another two columns of equal width below that
- Two columns of equal width and one column over the entire width underneath, with another three columns of equal width below that

The layout you choose is dependent on your screen resolution and the widgets you want to place on the appropriate tab. Perhaps you will have to 'fiddle around' with the layouts in order to arrive at the perfect view for your situation.

In order to determine the layout of a tab, take the following steps:

1. Click the Configuration icon to the right of the name of the detail view at the bottom of the tab for which you want to set the layout.
2. The configuration mode will open. If your tab has no layout you can simply click the desired layout within the tab. If your tab already has a layout (and you therefore want to change the existing layout), click the section 'Change layout' in the panel on the right, and then click below on the desired (new) layout.

You have now determined the layout of your tab. Now you can simply open another tab and choose a layout for that. If you click the Configuration icon to the right of the name of the detail view again, the Configuration mode will close and you will be back in Regular mode.
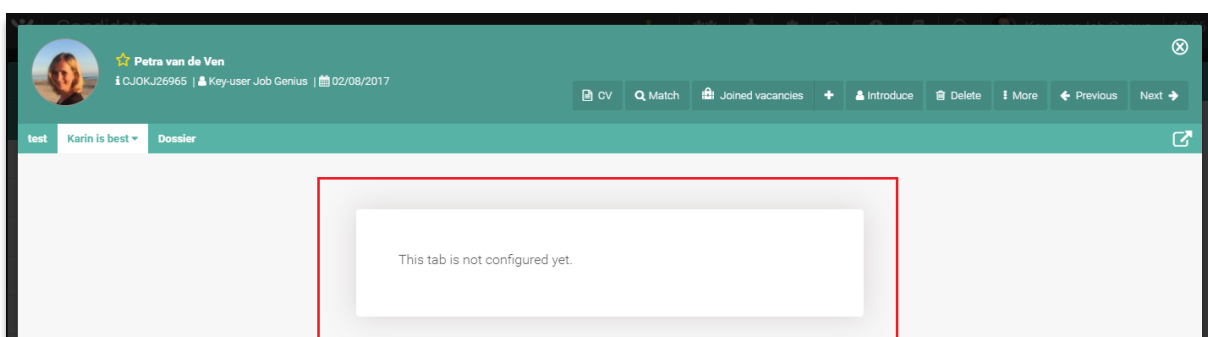

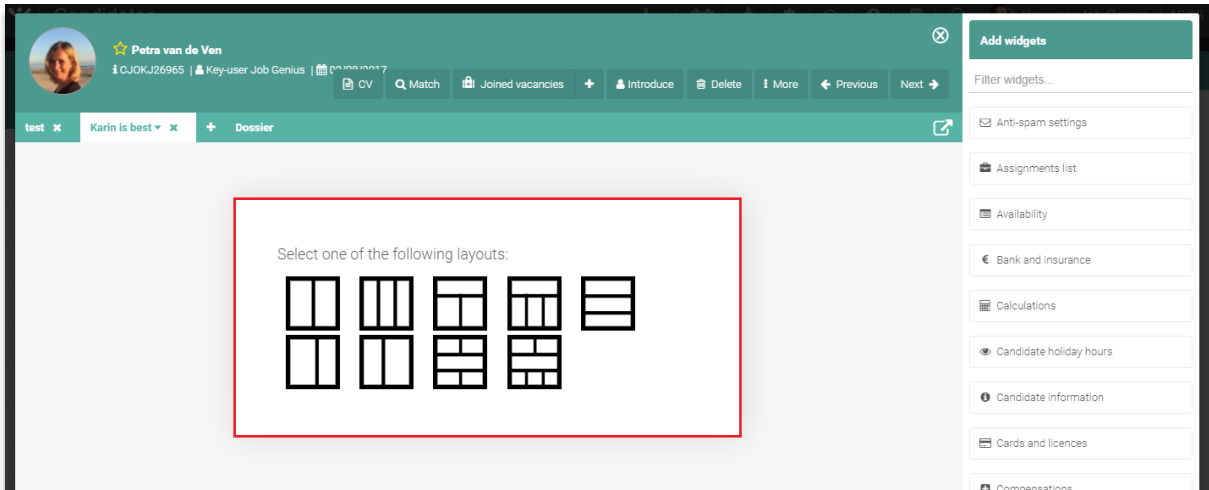*Fig. 8 - Non-configured tab in View mode*
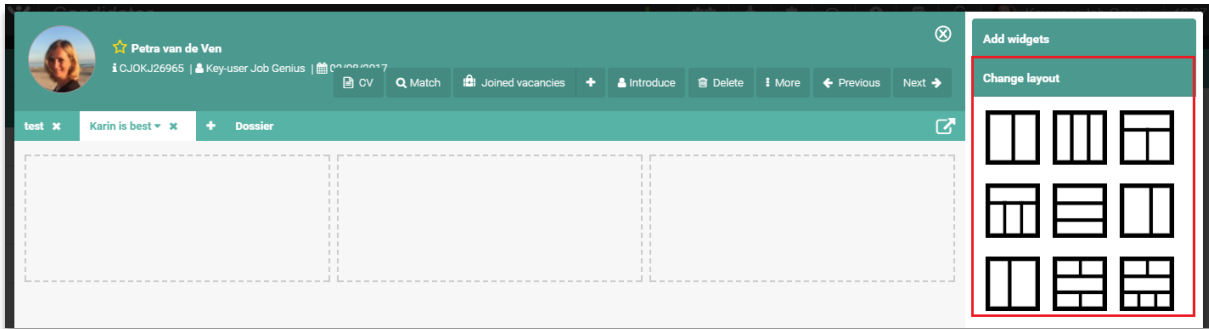
Fig. 9 - Non-configured tab in Configuration mode

Fig. 10 - Adjust tab layout

2.4 CONFIGURE WIDGETS PER TAB

After you have determined the layout of your tab(s), you can fill them. The data that can be registered for each entity is divided into different sections (called widgets). There is, for example, a widget in Candidates with general candidate information, a widget with education, a widget with work experience and a widget with the candidate dossier. You can distribute the widgets that interest you over the tabs you created (obviously you should give a prominent place to the widgets that contain important information for you).

To place widgets on a tab, take the following steps:

1. If you are not in Configuration mode (which can be recognised by the configuration panel on the right side of the detail view), click at the bottom of the tab where you want to place widgets on the Configuration icon to the right of the name of the detail view.
2. The configuration panel on the right is composed of two sections: 'Add widgets' and 'Change layout'. If the section 'Change layout' is open, click on 'Add widgets' to open this section.
3. You will then see a list of widgets that can be placed on the tab. Use the search filter at the top to search for a specific widget. If you want to add a widget, you can click on it. The widget will be automatically added to the first section of the layout chosen by you. It is also possible to 'drag' a widget to the desired position. Your widget is placed directly on the chosen spot.
4. If you added a widget that you (on second thought) do not want to display on the tab, click the Close icon in the top right corner of the widget. The widget will then disappear from the tab.
5. If you added a widget that you (on second thought) want to place in a different position on the tab, simply drag it to the desired position.

The added widgets are saved automatically. You do not need to take any additional action. Once all the widgets are in the correct position the tab configuration is complete. Now you can simply open another tab and place widgets on it. If you click the Configuration icon to the right of the name of the detail view again, the Configuration mode will close and you will be back in Regular mode.
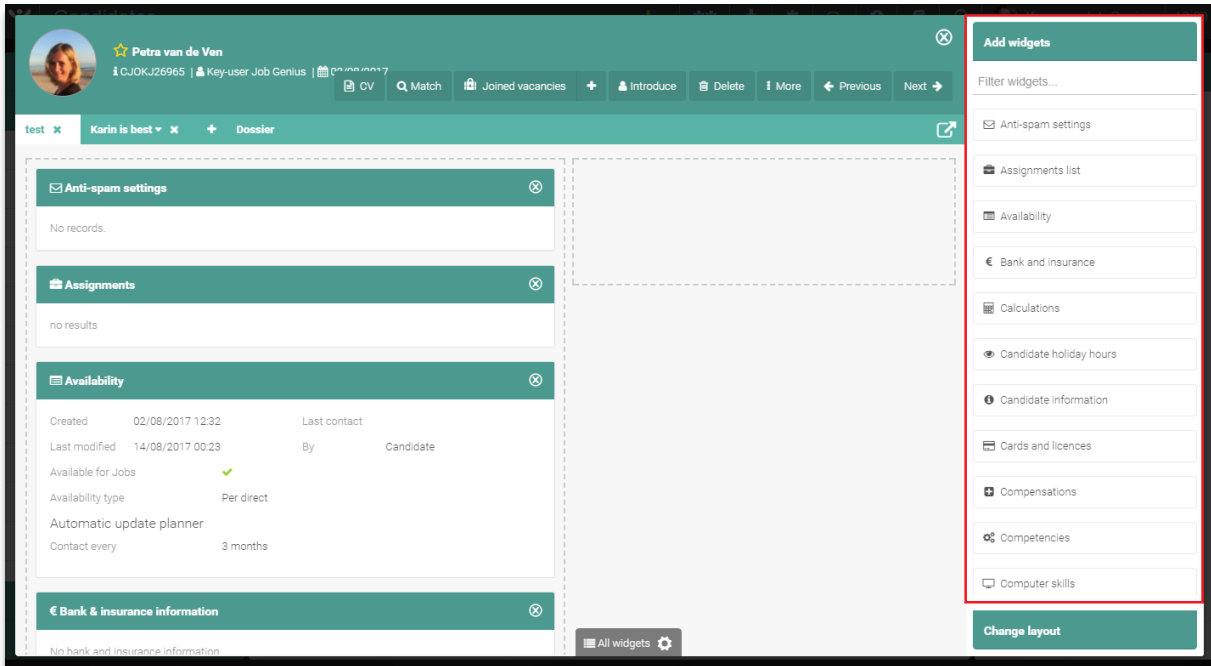
Fig. 11 - Configure widgets per tab

3 | USE DETAIL VIEWS

3.1 INTRODUCTION

Once you have configured your detail views (as described in the previous section), you can start using them. It is also possible to use the detail views without having configured them. In that case, of course, you use the standard OTYS detail view (which may not be optimal for your particular situation).

This chapter is divided into four sections:

- Layout detail view
- Switch between detail views
- Execute actions
- Edit data

3.2 LAYOUT DETAIL VIEW

Despite the fact that every entity displays different data (after all, you expect different information in a candidate detail than in a vacancy detail), the setup of these detail views is the same in all modules. This means you are able to make yourself familiar with the various modules of OTYS Go! quickly.

The detail views are set up as follows:

- In the top left corner you will find the most important information about the item. This usually consists of three lines:
    - In the top line you usually see the name and status (e.g. the name and status of the candidate, or the title and status of the vacancy).
    - In the middle line you usually see additional information about the item (for example, email address and telephone number of the candidate, or the client and contact of the vacancy).
    - In the bottom line you usually see the reference number, the owner and the creation date of the item. If you hover your cursor over the creation date, you may see additional information (such as by whom the item was created, when the item was last modified and by whom).
- In the top right corner you will find buttons to execute an 'action' for the item you are working with. These actions are grouped. For example, a candidate has a single 'Match' button which, when clicked, will give additional options ('Match to vacancies', 'Match to candidates' and 'Match to contacts'). At the end you will always find a 'Previous' and 'Next' button. This allows you to browse from a detail to a the next or previous item without having to return to

a list view. If a button is not applicable (e.g., the 'Previous' button for the first item in a list) then it is displayed in grey.

- Just below the basic information you will find several tabs. Because some entities can contain a lot of data, it is possible to divide them into different tabs and sub-tabs. In the previous chapter we explained how you can create tabs.

- On the far right side of the tabs you will find an icon to open the current detail in a new tab. This can be useful if you briefly want to open a candidate in another tab. By holding down the CTRL key (for Apple users the Command key) when clicking this icon, this tab will open in the background so you can continue with your work.

- Underneath the tabs you will find the content of the currently selected tab. This content is divided over different widgets. All information of each entity is clustered into groups and displayed in these widgets. There is, for example, a widget with vacancies that a candidate is matched to and a widget with the contacts of the relation. The 'dossier' is a widget too.

The above setup is the same for all standard detail views. Of course, the basic information, actions, tabs and widgets will be different for each entity.
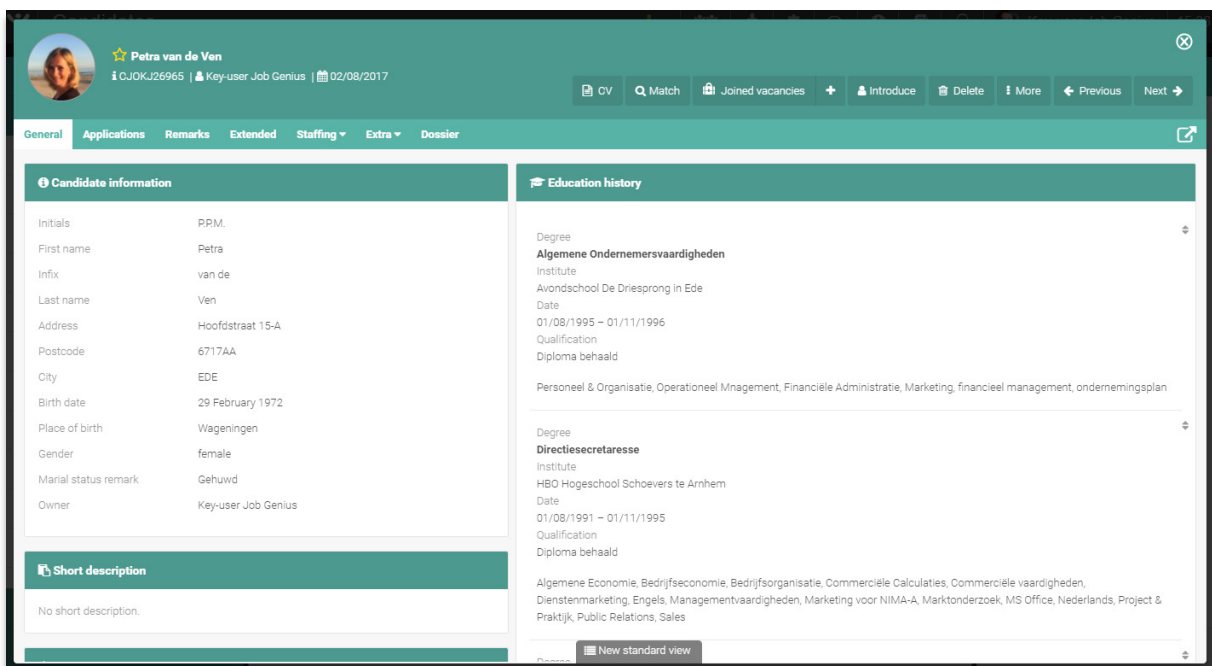

Fig. 12 - Layout detail view

3.3   SWITCH BETWEEN DETAIL VIEWS

If you have created several detail views, you can switch between these views. This allows you to use a different layout for an entity when you are doing a specific job (e.g. approaching prospects), than when you are busy with another task (e.g. recruitment). You can easily switch between detail views with the following steps:

1. Click at the bottom of the detail view, of which you wish to change the standard detail view, on the name of the detail view (usually the 'Standard view', but it can also have another name).
2. Click the detail view you want to open.

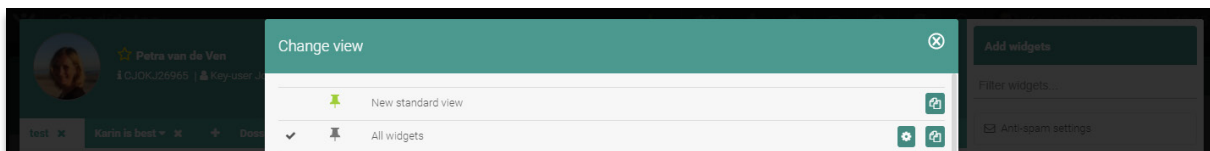The selected detail view will now open automatically.

Fig. 13 - Switching between detail views

Switching between detail views in this way only affects your current session. If you log back in tomorrow in your OTYS Go! system, the standard detail view is used again. Earlier, you read how to change your standard detail view.

3.4   EXECUTE ACTIONS

At the top right of your detail view are buttons for executing certain actions. For example, this could be the matching of a candidate with a vacancy or the removal of a contact.

The action buttons vary by entity and the behaviour that follows can also be different. For example, clicking the 'Matched candidates' button in a vacancy detail will open the Procedures module in a new window, with a search filter that makes sure that only the matched candidates for this vacancy are shown. If you click on the 'Delete' button in a candidate detail, we will first ask for confirmation of this action. After confirmation, we will remove the candidate and close the candidate detail view automatically.
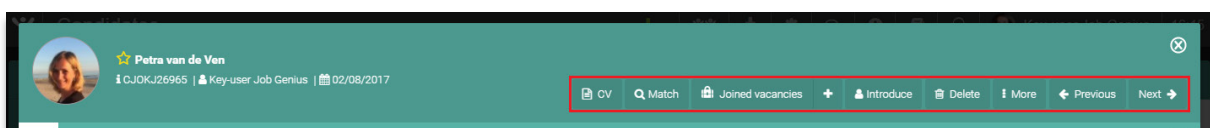

Fig. 14 - Action buttons in detail view

The actions are grouped as far as possible. For example, there is a 'Match' button with all the match options in a candidate detail and a 'Propose' button with all proposal options. Also, most entities have a 'More' button with other actions.

If you have a lower resolution (for example, because you use OTYS Go! on the iPad), the buttons will show only icons to ensure they fit on your screen.

3.5   EDIT DATA

There are several options for editing the data in a widget.

If a widget consists of specific fields (such as the basic information of a candidate), then click the Edit icon in the top right corner of the widget. This icon will appear only when you hover your cursor over the widget. The widget will open in Edit mode with adjustable fields. In the top right corner of the widget you will now see a Save and Cancel icon. You can make the changes and click the Save icon to save them.
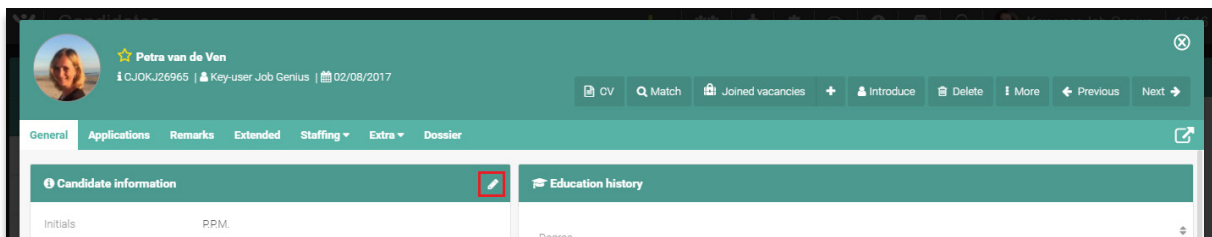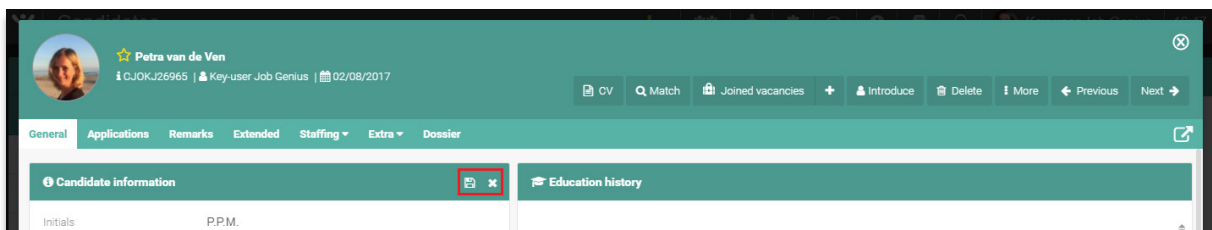

Fig. 15 - Edit button in widget

Fig. 16 - Save and Cancel button in widget

If a widget contains information for which you can create several 'items' (for example, candidate work experience), then click in the top right corner of the widget on the Add icon to create a new item. A small form will appear (depending on what you are creating) with a Save button and a Cancel button underneath. You can enter the details and click the Save button to save them. To edit or delete an item, hover your cursor over the item and click on the item. You can then make the changes and click the Save button or click the Delete button to remove the item. For many of these widgets with multiple items, it is also possible to click the icon to the right of the item and drag it to another

desired position. Lists like these often only show the first items (to ensure a clear overview). If you see a '...' icon at the bottom with the text 'and xx more', you can click it to see additional items.
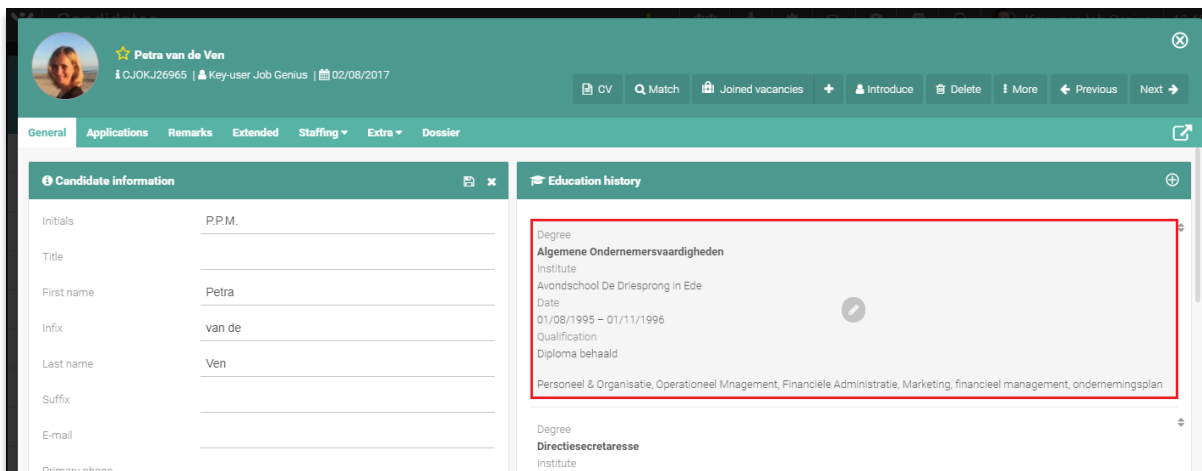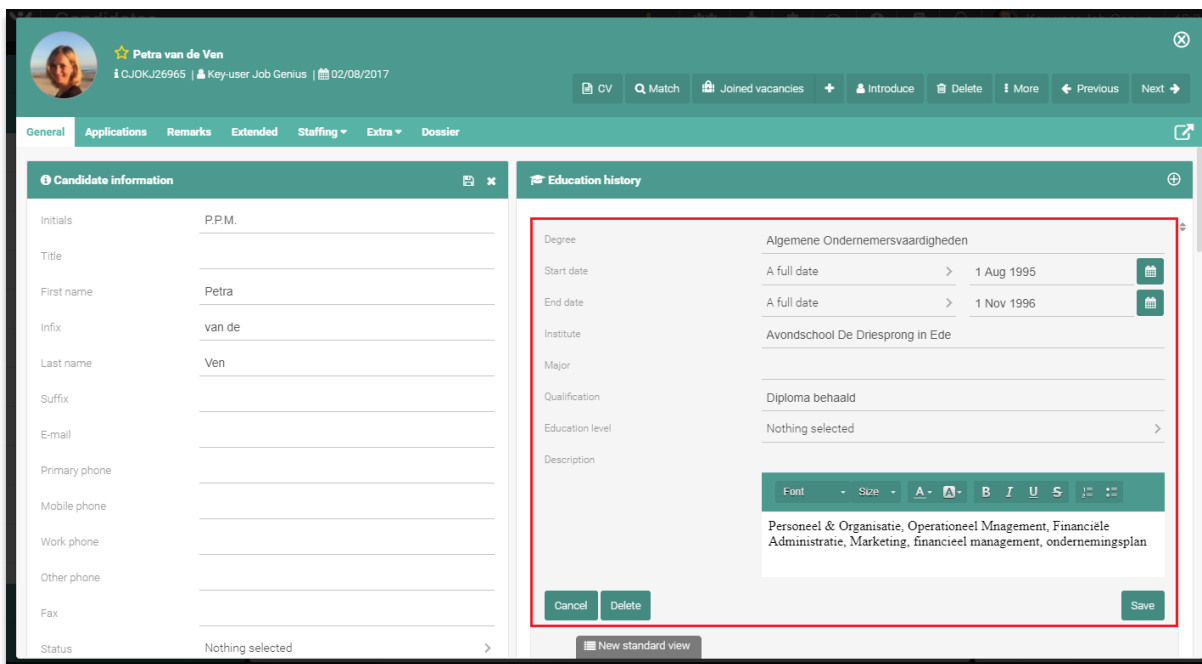

Fig. 17 - Edit item in widget

Fig. 18 - Edit item view in widget

For match criteria and CRM criteria, we show the entered criteria by default. If you see a '...' icon at the bottom with the text 'and xx more', this means that there are also criteria that have not been entered. Clicking it will make the additional items appear. For match criteria and CRM criteria, there is no difference between View mode and Edit mode. You can directly add match criteria or CRM criteria to the widget (or remove them by clicking the 'x' icon next to a criterion). When editing match criteria or CRM criteria, you do not need to click on a Save icon. This will happen automatically.
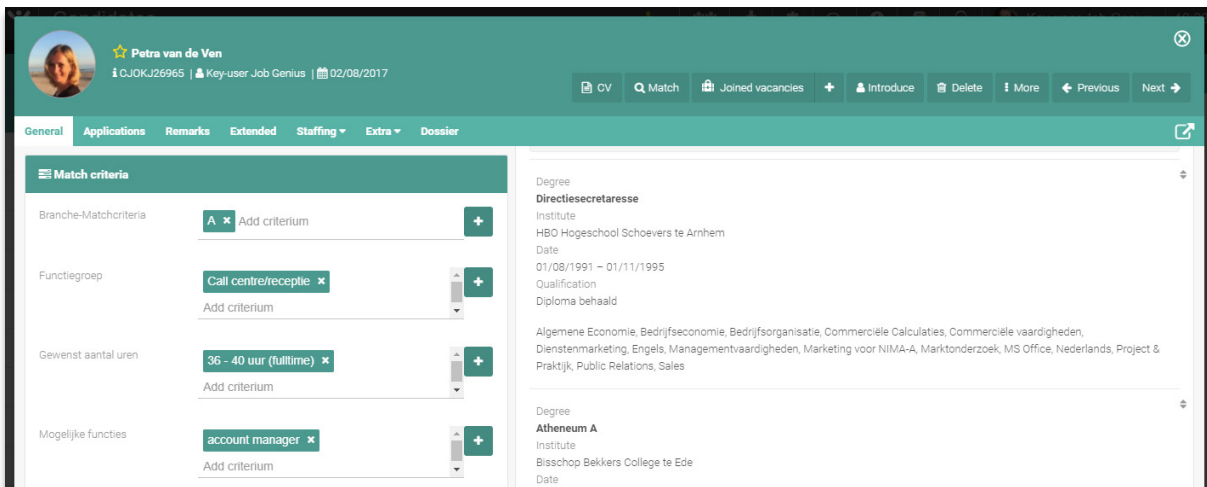
Fig. 19 - Editing criteria in widget

Finally, there are some very specific widgets (e.g. the dossier) with a different functioning, and there are a limited number of widgets (e.g. a widget that shows the assignments of a candidate) where you cannot edit any data from within the widget.