DOSSIERS

INSTRUCTION MANUAL

OTYS Recruiting Technology

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1 | INTRODUCTION

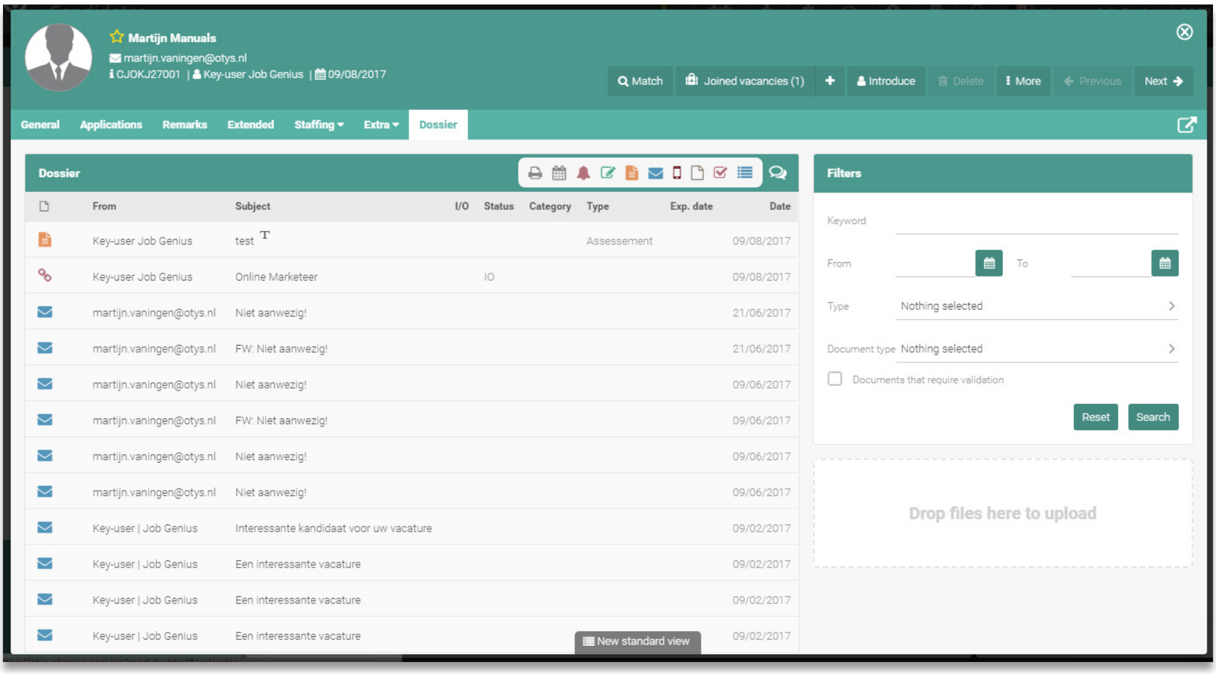
1.1 ABOUT DOSSIERS IN OTYS GO!

The dossier has a central role among the major entities in OTYS Go! (such as candidates, relations and contacts). The dossier contains the history of the relevant item. The dossier can contain different items:

- Calendar appointments
- Reminders
- Notes
- Documents
- Emails
- SMS messages
- Standard documents
- Tasks
- Forms
- Memberships
- Procedures

For most dossier items, it is possible to create a new item directly from the dossier (for example, adding a note). It is possible that you do not see certain options here because you do not use the relevant functionality. For example, if you are not using our SMS module, you will not find an SMS icon in the dossier.

If you received an email from a candidate or a contact, or sent one to them, the email is automatically saved in the relevant dossier. This, of course, provided that the relevant email address is linked to the candidate or contact.


Match
Joined vacancies (1)
Introduce
Delete
More
Previous
Next
General
Applications
Remarks
Extended
Staffing
Extra
Dossier
Filters
Reset
Search
Drop files here to upload
New standard view

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martijn.vaningen@otys.nl
CJOKJ27001 | Key-user Job Genius | 09/08/2017

Dossier

	From	Subject	I/O	Status	Category	Type	Exp. date	Date
	Key-user Job Genius	test				Assessement		09/08/2017
	Key-user Job Genius	Online Marketeer		IO				09/08/2017
	martijn.vaningen@otys.nl	Niet aanwezig!						21/06/2017
	martijn.vaningen@otys.nl	FW: Niet aanwezig!						21/06/2017
	martijn.vaningen@otys.nl	Niet aanwezig!						09/06/2017
	martijn.vaningen@otys.nl	FW: Niet aanwezig!						09/06/2017
	martijn.vaningen@otys.nl	Niet aanwezig!						09/06/2017
	martijn.vaningen@otys.nl	Niet aanwezig!						09/06/2017
	Key-user | Job Genius	Interessante kandidaat voor uw vacature						09/02/2017
	Key-user | Job Genius	Een interessante vacature						09/02/2017
	Key-user | Job Genius	Een interessante vacature						09/02/2017
	Key-user | Job Genius	Een interessante vacature						09/02/2017

Keyword
From
To
Type Nothing selected
Document type Nothing selected
☐ Documents that require validation

Fig. 1 - Dossier in OTYS Go!

1.2 INSTRUCTION OBJECTIVE

These instructions are intended for OTYS clients, to enable them to search for information in dossiers and add new information.

1.3 INSTRUCTION STRUCTURE

After this introductory chapter, we explain step by step how to use the dossier functionality in OTYS Go! We will first explain how to access and search the dossier. Next, we will explain how you can add a particular item to the dossier.

2 | USE OF DOSSIER

2.1 INTRODUCTION

As indicated, the dossier has an important role in your OTYS system. For example, to retrieve the history of a candidate, a contact or a relation. Not every entity in OTYS Go! has a dossier, but the main ones do.

The following entities have a dossier in OTYS Go!:

- Candidates
- Vacancies
- Relations
- Contacts
- Assignments
- Tasks
- Sales

This dossier is available in the form of a 'widget'. This allows you to decide where you want to place this dossier in a detail view. How you do this is explained in the instruction manual 'Detail views in OTYS Go!'.

This chapter is further divided into three sections:

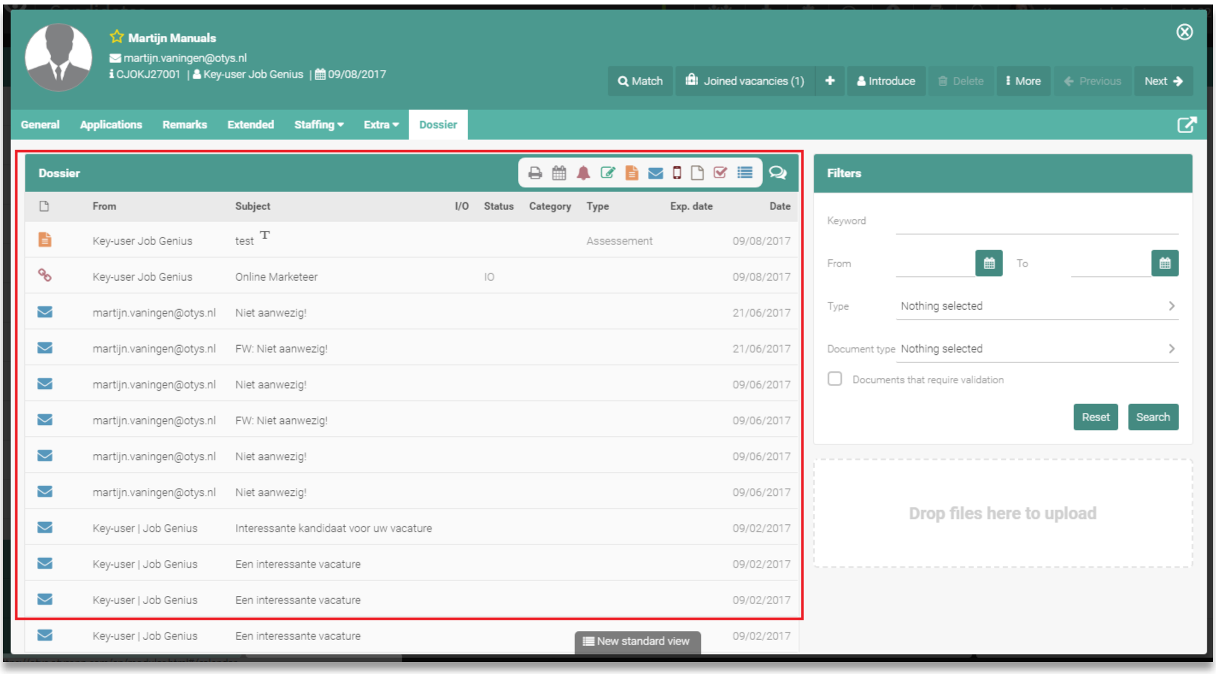
- Dossier layout
- Search the dossier
- Add dossier items

2.2 DOSSIER LAYOUT

Each dossier is set up in the same way:

- In the top right corner you first see a group of icons to create a new dossier item in the dossier concerned. The icons that will appear depend on the modules to which you have access and the entity you are looking into, but can include the following options:
  - New appointment
  - New reminder
  - New note
  - New document
  - New email
  - New SMS
  - New standard document

        - New task
        - New interactions form
- To the right of these icons is a Filter icon. If you click it, a search filter will appear to search within the dossier.
- Right next to the Filter icon is a Chat icon. This allows you to start a chat conversation about the item you are in at that moment. For example, you can start a chat conversation in a candidate screen and, if necessary, save it as a note in the dossier concerned. Read more about this in our instruction manual 'Chat module'.
- If you have expanded the filter with the Filter icon, you will see a search filter which allows you to search the dossier.
- Below you can see a list of all dossier items. Each dossier item has its own icon and if you click on it the relevant dossier item will open.
- Right at the bottom you will find navigation information. On the left you can see the total number of dossier items within your current search. On the right are buttons to scroll through the pages ('First page', 'Previous Page', 'Next Page' & 'Last page'). In the middle you will see an indicator that shows the dossier items that are currently displayed (for example, '1-25'). By clicking on this you can jump directly to a specific page, if needed.



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Dossier

	From	Subject	I/O	Status	Category	Type	Exp. date	Date
	Key-user Job Genius	test T				Assessement		09/08/2017
	Key-user Job Genius	Online Marketeer		IO				09/08/2017
	martijn.vaningen@otys.nl	Niet aanwezig!						21/06/2017
	martijn.vaningen@otys.nl	FW: Niet aanwezig!						21/06/2017
	martijn.vaningen@otys.nl	Niet aanwezig!						09/06/2017
	martijn.vaningen@otys.nl	FW: Niet aanwezig!						09/06/2017
	martijn.vaningen@otys.nl	Niet aanwezig!						09/06/2017
	martijn.vaningen@otys.nl	Niet aanwezig!						09/06/2017
	Key-user | Job Genius	Interessante kandidaat voor uw vacature						09/02/2017
	Key-user | Job Genius	Een interessante vacature						09/02/2017
	Key-user | Job Genius	Een interessante vacature						09/02/2017
	Key-user | Job Genius	Een interessante vacature						09/02/2017

Keyword
From To
Type: Nothing selected
Document type: Nothing selected
☐ Documents that require validation

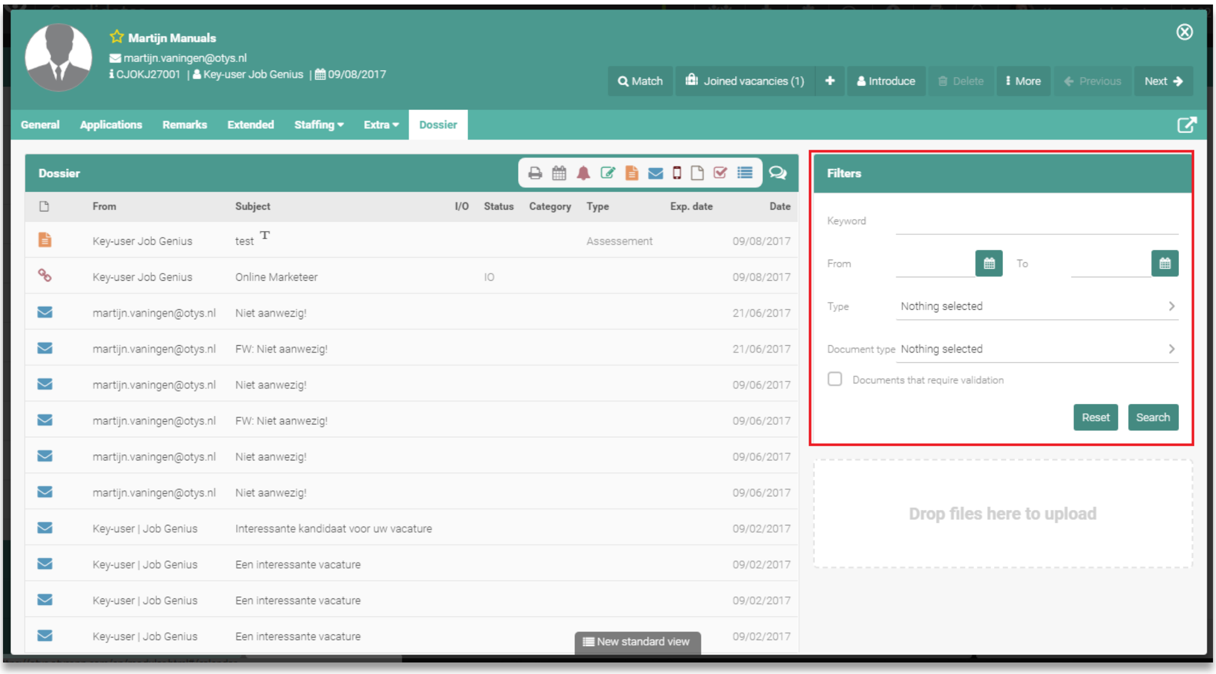
Fig. 2 - Dossier setup

2.3 SEARCH THE DOSSIER

If you open the search filter via the Filter icon, it will appear above the list with dossier items. You can then search for several things:

- You can search for specific dossier items. This allows you to search for specific calendar appointments, notes or emails, for example.
- You can search for specific keywords. This allows you to search for a specific word in the subject line of an email, for example. After typing the keyword the list will automatically refresh (so you do not have to press the search button).
- You can search for dossier items within a certain period. This is useful if you are looking for a certain contact moment that took place last July.
- If you use dossier types, you can search for those too. By making use of dossier types, you can designate a note as 'Telephone note prospect', for example. You can then easily search within a dossier for all notes of this type, and it is also possible to report on this in the Go! Reports module.

By clicking 'Search' after selecting the above options, a search will take place within the dossier, and the list of dossier items will automatically refresh. By clicking the 'Reset' button you cancel the search, and you will see all dossier items again.



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	From	Subject	I/O	Status	Category	Type	Exp. date	Date
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✉	martijn.vaningen@otys.nl	Niet aanwezig!						21/06/2017
✉	martijn.vaningen@otys.nl	FW: Niet aanwezig!						21/06/2017
✉	martijn.vaningen@otys.nl	Niet aanwezig!						09/06/2017
✉	martijn.vaningen@otys.nl	FW: Niet aanwezig!						09/06/2017
✉	martijn.vaningen@otys.nl	Niet aanwezig!						09/06/2017
✉	martijn.vaningen@otys.nl	Niet aanwezig!						09/06/2017
✉	Key-user | Job Genius	Interessante kandidaat voor uw vacature						09/02/2017
✉	Key-user | Job Genius	Een interessante vacature						09/02/2017
✉	Key-user | Job Genius	Een interessante vacature						09/02/2017
✉	Key-user | Job Genius	Een interessante vacature						09/02/2017

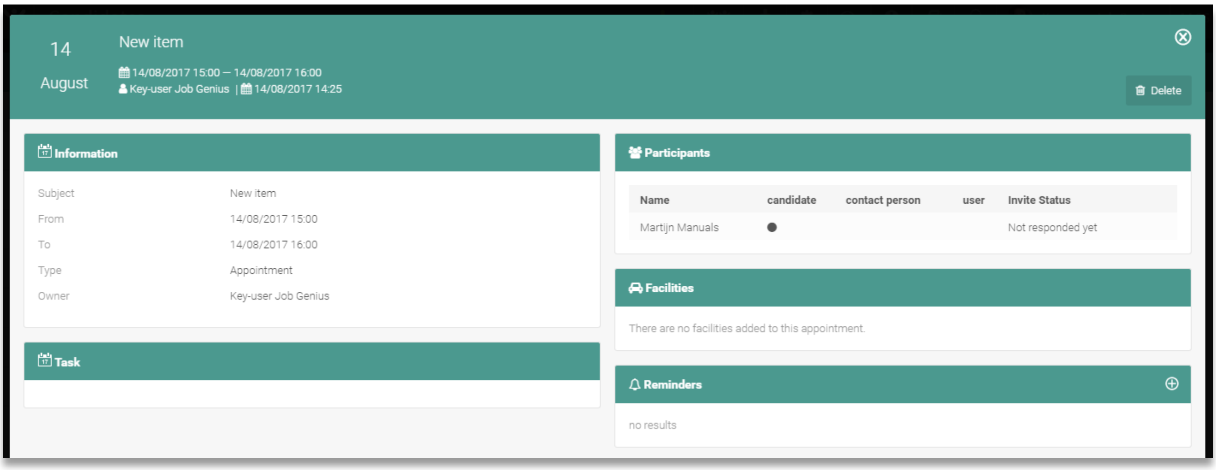
Keyword
From To
Type Nothing selected
Document type Nothing selected
☐ Documents that require validation

Fig. 3 - Search filter in dossier

2.4 ADD DOSSIER ITEMS

2.4.1 NEW APPOINTMENT

By clicking on the icon 'New appointment', a new blank calendar appointment will open. From here you can complete the calendar entry. This is further explained in the instruction manual of our Calendar module.



14 August

New item

14/08/2017 15:00 — 14/08/2017 16:00
Key-user Job Genius | 14/08/2017 14:25

Information

Subject	New item
From	14/08/2017 15:00
To	14/08/2017 16:00
Type	Appointment
Owner	Key-user Job Genius

Task

Participants

Name	candidate	contact person	user	Invite Status
Martijn Manuals	●			Not responded yet

Facilities

There are no facilities added to this appointment.

Reminders

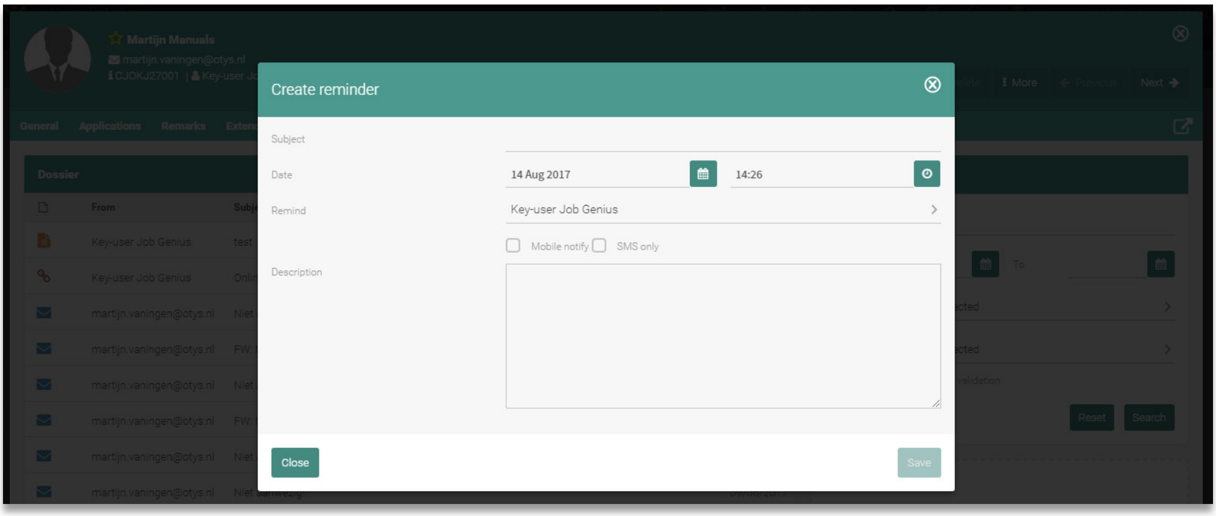
no results

Fig. 4 - New appointment from dossier

If you create a calendar item from a candidate dossier, the candidate will be automatically matched as the invitee for the calendar item. If you do this from a contact dossier, the contact will be automatically matched as invitee for the calendar item. This does not mean that they will automatically receive a calendar request by email. In some cases, you will want this and in other cases you won't (for example, if you want to only register that the meeting with the candidate will take place). If you want to send a calendar request by email, you will need to specify this further in the calendar item. How you do this is also further explained in the instruction manual of our Calendar module.

2.4.2 NEW REMINDER

By clicking on the icon 'New reminder', a new blank reminder will open. From here you can complete the reminder. How you do this is explained in the instruction manual of our Reminder module. The reminder is automatically matched to the entity from which you create it. This allows you to create a reminder from a candidate screen and - when it appears - directly open the relevant candidate from within the reminder.



Create reminder

Subject:

Date: 14 Aug 2017 14:26

Remind: Key-user Job Genius

☐ Mobile notify ☐ SMS only

Description:

Fig. 5 - New reminder from dossier

2.4.3 NEW NOTE

By clicking on the icon 'New Note', a new blank note will open. You can then complete the fields as follows:

- Enter a short description of the note at 'Subject'. This subject will appear immediately in the list view of the dossier. It is therefore more convenient to use 'Regarding the interview of last Friday' as a subject, instead of a generic subject such as 'Interview report'.
- Enter the extensive notes in the note itself (if applicable).
- If you use dossier types you can give a characterisation of the note at 'Type'. Thus, for example, you can designate the note type 'Telephone note prospect'. This can be used to search for notes of this type in the dossier or to report on the number of created notes with the designation of 'Telephone note prospect' in Go! Reports module. We will tell you more about the latter in our Reports instruction manual.
- The dossier items appear by default in chronological order, from newest to oldest. By putting 'Always at the Top' to 'Yes', the note will always be displayed at the top of the list. If there are multiple dossier items with this 'Always at the top' flag, these will be displayed at the top in chronological order. You can use this for (very) important notes to be shown immediately when you open the dossier.
- Create a private note by putting 'Private' to 'Yes'. The note in the dossier will be visible to you but not to your colleagues.

After completing the fields above, click 'Save note' to save it.

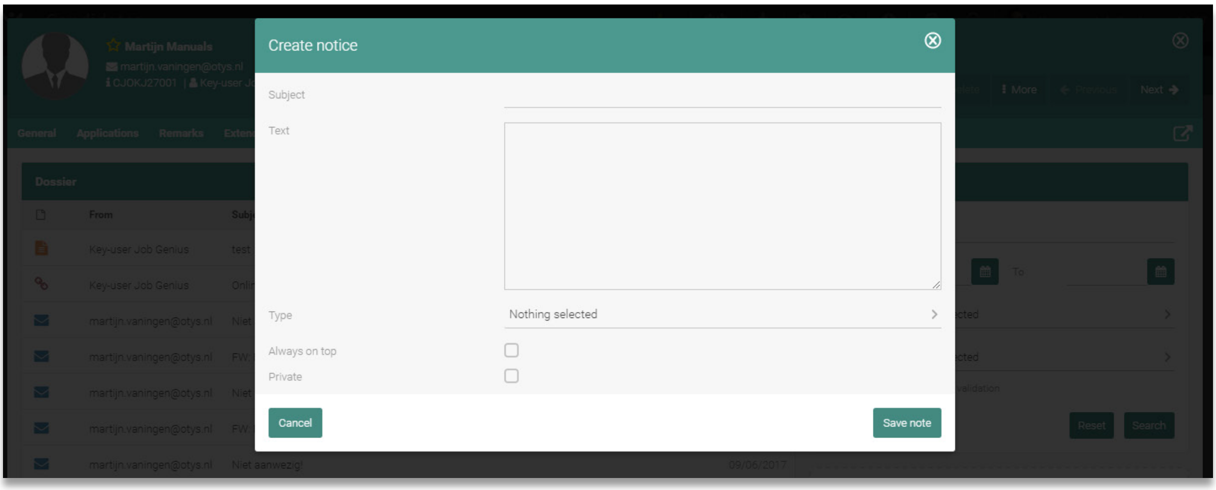


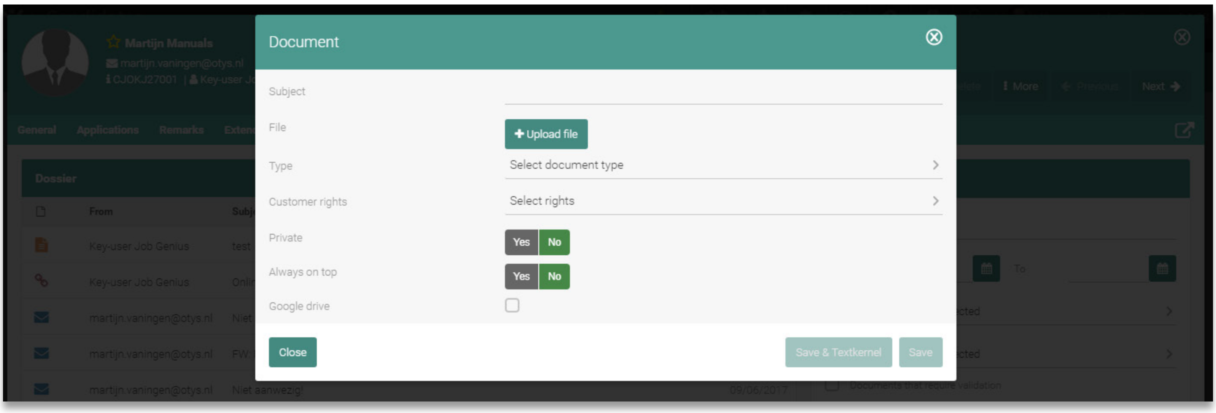
Fig. 6 - New note from dossier

2.4.4 NEW DOCUMENT

By clicking the icon 'New document', a window will appear that allows you to upload a document to the dossier. This is useful if you want to match a document on your computer or network directly to a particular item (for example to a particular candidate), so it will always be available to you and your colleagues. You can complete the following fields:

- At 'Subject', enter a brief description of the document. This subject will appear immediately in the list view of the dossier. Therefore, it is more convenient to use a specific subject, for example, 'Evaluation form Q1 2017', instead of a generic subject such as 'Evaluation'.
- Click 'Upload file' to add a file. You can then search for it on your local computer or network. This file will then be placed on the OTYS server so you can access it from anywhere with an Internet connection via OTYS.
- By setting 'Private' to 'Yes', you create a private document. The document will be visible to you but not to your colleagues.
- The dossier items appear by default in chronological order, from newest to oldest. By putting 'Always at the Top' to 'Yes', the document will always be displayed at the top of the list If there are multiple dossier items with this 'Always at the top' flag, these will be displayed at the top in chronological order. You can use this for (very) important documents to be directly displayed when opening the dossier.
- If you use our Google Drive integration, you can tick 'Google Drive', and the file will be uploaded to the Google Drive server (instead of the OTYS server). You will, for example, be able to open the file at a later time from Google Docs, and adapt it without you needing to save the file again in the dossier.

After completing the fields above, click 'Save' to save them. If you upload a document in a candidate dossier you can also click the 'Save & TextKernel' button. This will immediately start a TextKernel process, allowing you to easily complete the data of a candidate. More information can be found in our instruction manual for the Candidates module.


Document
Upload file
Close
Save & Textkernel
Save

Subject

File

Type: Select document type

Customer rights: Select rights

Private: Yes No

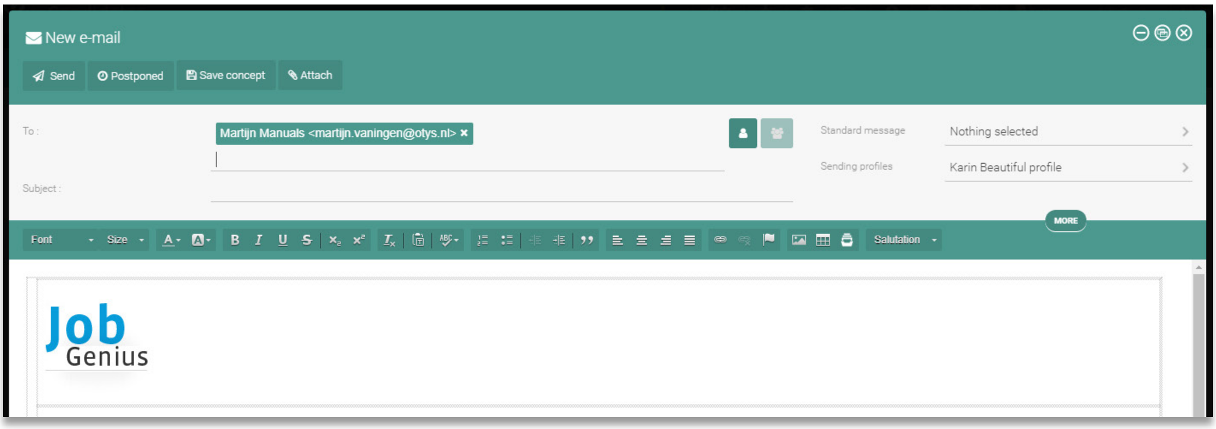
Always on top: Yes No

Google drive ☐

Fig. 7 - New document from dossier

2.4.5 NEW EMAIL

By clicking on the icon 'New email', a new blank email will open. You can write and send the email from here. This is explained in the instruction manual of our Email module.


New e-mail
Send
Postponed
Save concept
Attach
MORE
Font
Size
Salutation
Job
Genius

To : Martijn Manuals <martijn.vaningen@otys.nl>

Subject :

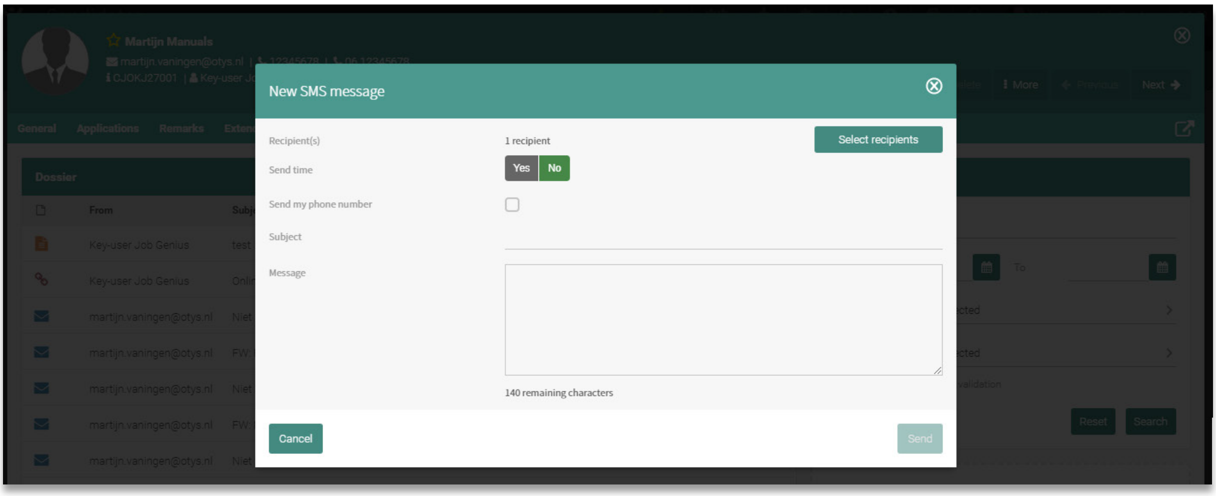
Standard message: Nothing selected

Sending profiles: Karin Beautiful profile

Fig. 8 - New email from dossier

2.4.6 NEW SMS

By clicking on the icon 'New SMS', a new blank SMS will open. You can write and send the SMS from here. This is explained in the instruction manual of our SMS module.



Recipient(s): 1 recipient

Send time: Yes / No

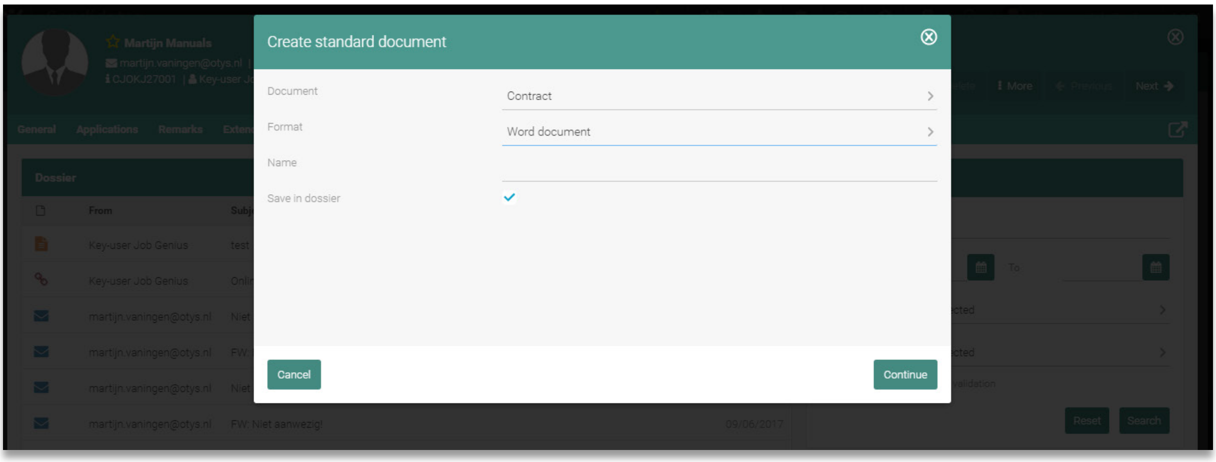
Send my phone number: ☐

140 remaining characters

Fig. 9 - New SMS from dossier

2.4.7 NEW STANDARD DOCUMENT

Standard documents are Word files or emails filled with standard text, merge fields and/or input fields. This allows you, for example, to generate a Word document from a candidate dossier with the candidate data already entered (from the database). By clicking on the icon 'New standard document', a window will appear in which you can select a standard document configured in your environment. You can then select an output method (e.g. ‘Email’), and optionally specify a name. By clicking on the 'Continue' button, the standard document will be generated. If there are input fields set in the standard document, you will first be asked to complete these. Then the standard document will be generated. If you opted for the output method 'Word' you will have the option (depending on your browser) to download or open the Word file. If you opted for the output method 'Email', the email will open so you can customise it before you send it.



Document: Contract

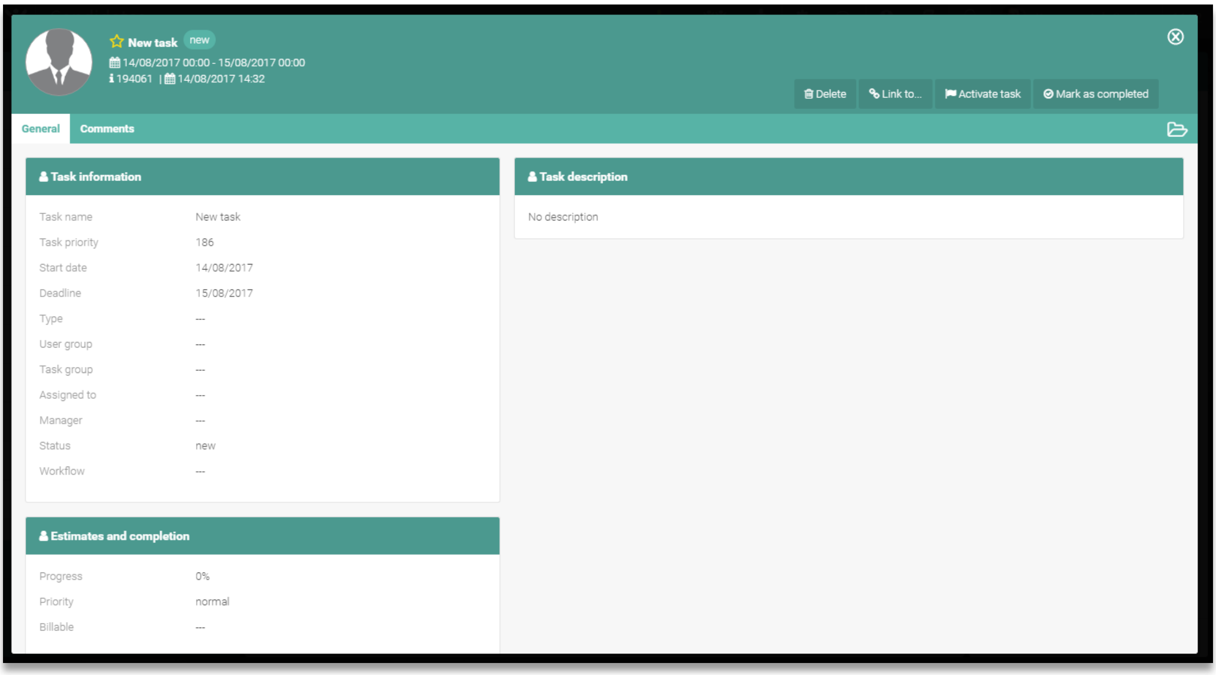
Format: Word document

Save in dossier: ✓

Fig. 10 - New standard document from dossier

2.4.8 NEW TASK

By clicking on the icon 'New task', a new blank task will open. You can complete the task from here. This is explained in the instruction manual of our Tasks module.



New task new
14/08/2017 00:00 - 15/08/2017 00:00
194061 | 14/08/2017 14:32

Task information

Task name	New task
Task priority	186
Start date	14/08/2017
Deadline	15/08/2017
Type	—
User group	—
Task group	—
Assigned to	—
Manager	—
Status	new
Workflow	—

Task description

No description

Estimates and completion

Progress	0%
Priority	normal
Billable	—

Fig. 11 - New task from dossier

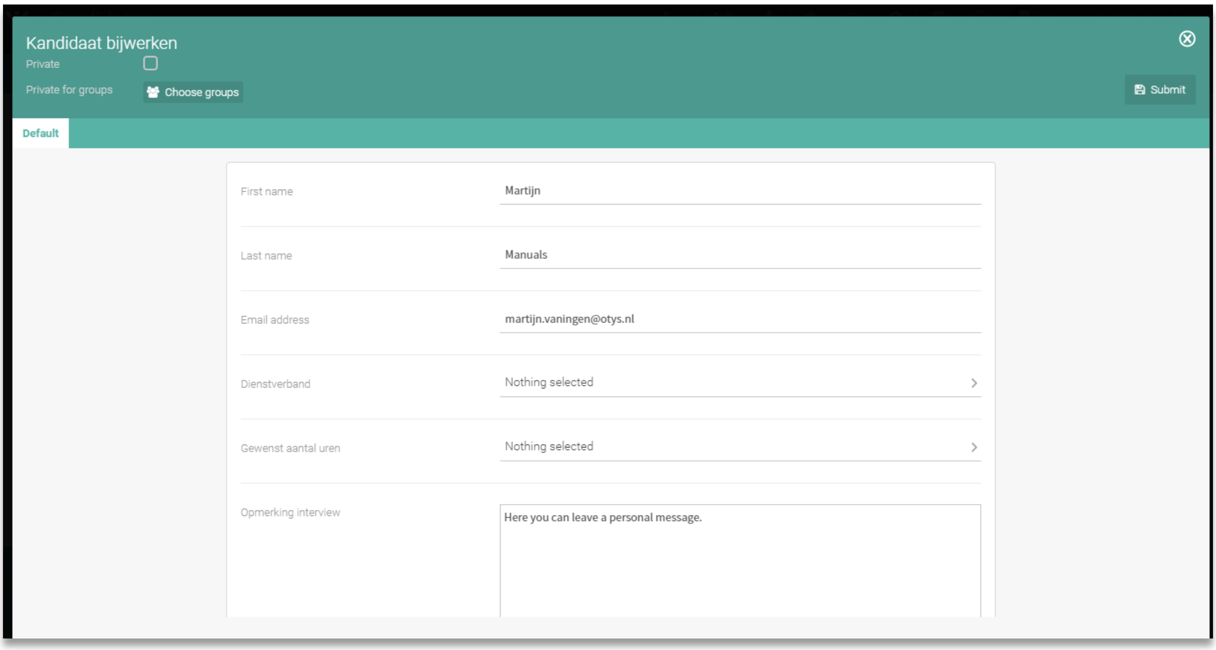
2.4.9 NEW INTERACTIONS FORM

You can compose forms and complete them from a dossier (among other things) through interaction forms. For each field, you can choose from various form elements (such as text fields, text boxes and selection options), and the fields can be distributed over multiple tabs. It is also possible to match fields to database fields. For example, you can match a field to the database field 'Brief description' of a candidate.

You will only see the 'New interactions form' icon when there is at least one form present to update the data of the current entity. For example, if you are working in a candidate dossier without any forms with the action 'Update candidate', you will not see this icon. If there is one form with the action 'Update candidate', the appropriate form will immediately open. If there are multiple forms with the action 'Update candidate', there will be a selection screen to select the form you want to complete.

In the form that opens, matched database fields will be automatically completed, based on what was already entered. If the candidate of which you generate a form contains a brief description, this form field will be filled with the brief description of the candidate. After saving the form, these matched fields will also be again saved in the database. Additionally, you can always access all the completed form fields from the form in the dossier and if needed export them in PDF format.

More information about this functionality can be found in our instruction manual for the Interaction module.


Kandidaat bijwerken
Private ☐
Private for groups
Choose groups
Submit
Default

First name	Martijn
Last name	Manuals
Email address	martijn.vaningen@otys.nl
Dienstverband	Nothing selected
Gewenst aantal uren	Nothing selected
Opmerking interview	Here you can leave a personal message.

Fig. 12 - New interactions form from dossier