



LISTS, SEARCH & MATCH

INSTRUCTION MANUAL



OTYS Recruiting Technology



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1 | INTRODUCTION

1.1 ABOUT LISTS, SEARCH & MATCH IN OTYS GO!

When opening a module in your OTYS Go! system you will almost always see a list view first. For example, when opening the Candidates module, you will first see a list of candidates. From these list views you can easily do a search to find the candidate or candidates you are looking for. From here you can execute various actions. For example, opening a specific candidate or executing a batch action on selected candidates from the search results.

Most modules in OTYS Go! have a fixed setup that is the same for all of these modules. This relates to the following modules:

- Candidates
- Vacancies
- CRM (relations & contacts)
- Procedures
- Activities
- Sales
- Tasks
- Assignments
- Timesheets
- Billing
- Underutilisation list
- Interactions
- Newsletters
- SMS Manager
- UTS Manager

The list views (shown when opening the module) have the following layout:

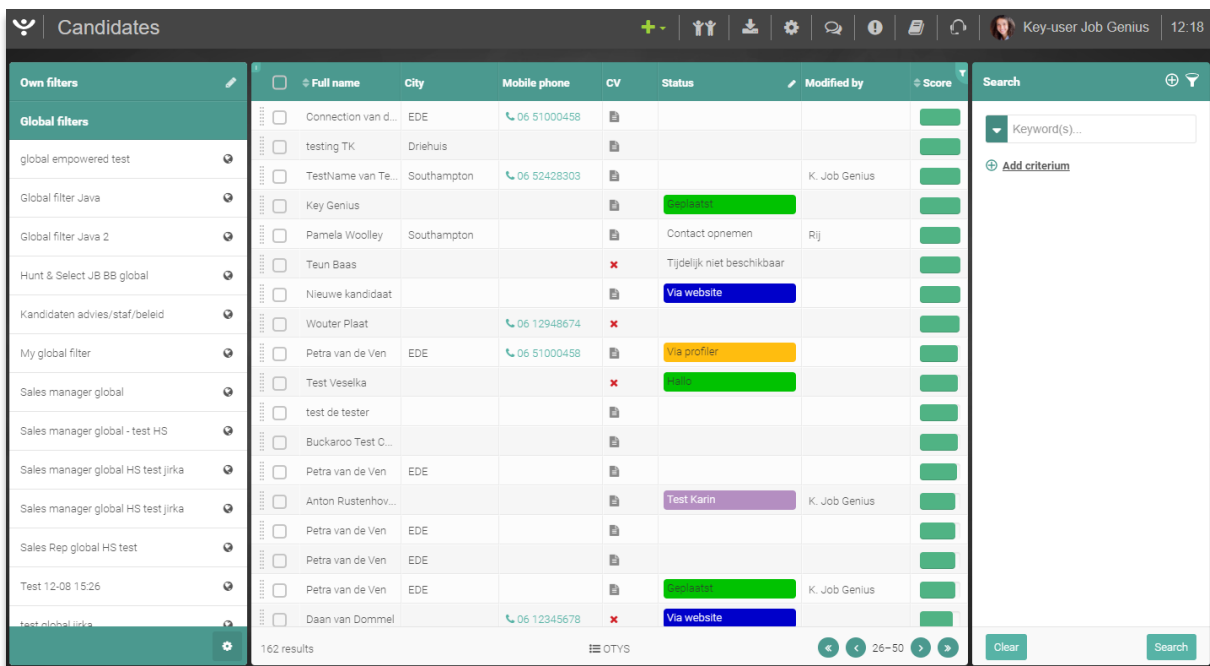
- On the left side there is a panel for quick search and batch actions
- In the middle there is a list of the items (e.g. one candidate per line)
- On the right side there is an advanced search panel

These list views can be configured flexibly. For example, determining which 'columns' make up a list. By aligning this configuration to your own process, you will be able to make more efficient use of your OTYS Go! system.

As mentioned, there is a standard list view for most modules in OTYS Go! You can probably imagine that a calendar requires a different layout. Other modules therefore have (specific) differing list views, since they are linked to the relevant module.

1.2 INSTRUCTION OBJECTIVE

These instructions are intended for OTYS clients, to enable them to use and configure OTYS Go! lists, search & match (including searching these lists). This instruction manual focuses only on the standard list views that are available in most modules, as mentioned before.



Full name	City	Mobile phone	CV	Status	Modified by	Score
Connection van d...	EDE	06 51000458				
testing TK	Driehuis					
TestName van Te...	Southampton	06 52428303			K. Job Genius	
Key Genius						
Pamela Woolley	Southampton			Contact opnemen	Rij	
Teun Baas				Tijdelijk niet beschikbaar		
Nieuwe kandidaat				Via website		
Wouter Plaats		06 12948674				
Petra van de Ven	EDE	06 51000458		Via profiel		
Test Veselka						
test de tester						
Buckaroo Test C...						
Petra van de Ven	EDE					
Anton Rustenhov...				Test kann	K. Job Genius	
Petra van de Ven	EDE					
Petra van de Ven	EDE					
Petra van de Ven	EDE					
Daan van Dommel		06 12345678		Via website		

Fig. 1 – Example list view

The differing list views (including the search options for these lists) 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 explain step by step how to configure and use the standard list views in OTYS Go! We also explain how to search & match in your system. Therefore this instruction manual is divided into three chapters:

- Configuration of list views
- Use of list views
- Search & match

2 | CONFIGURATION OF LIST VIEWS

2.1 INTRODUCTION

As indicated previously, a list view has three components:

- On the left there is a panel for quick search and batch actions
- In the middle there is a list of the items (e.g. one candidate per line)
- On the right side there is an advanced search panel

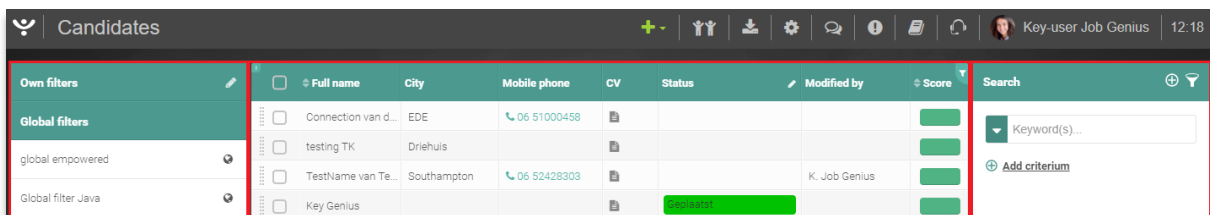


Fig. 2– Components list view

Both the panel on the left and the list in the middle can be configured per user. This allows you, for example, to determine what data/columns you want to have appear in your list views. By adjusting this configuration to your work method you can work more efficiently in OTYS Go! For example, by displaying the data/columns that are important to you for selecting the right candidate from the list of candidates, you will be able to make better choices.

This chapter is further divided into three sections:

- Layout of panels
- Configure quick search & batch panel
- Configure lists

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 LAYOUT OF PANELS

In list view, 20% of your screen width is by default reserved for the left panel (quick search & batch), 60% is reserved for the centre (list) panel and the remaining 20% is reserved for the right (search) panel. For most screens, this is a logical subdivision.

It may be that you prefer another ratio or that, for example, you want to hide the entire left panel.

You can therefore easily adapt the structure of these panels yourself:

1. Move your cursor to the space between two panels. This is the space between the left and the centre panel or the space between the centre and the right panel. You will see that your cursor (normally an 'arrow') changes into a symbol indicating that you can adjust the width.
2. Now drag the panel to the desired position by clicking it with your mouse, holding and dragging it to the desired location, where you drop it. If you want to hide the entire left panel, drag it all the way to the left. If you want to hide the entire right panel, drag it all the way to the right. You can always drag these panels back to display them again.
3. After releasing your mouse button the position of the panels is saved automatically. You do not need to click a Save button.

The layout of these panels is stored on your device per module, with the help of a cookie. This means that if you access OTYS Go! from a computer at work (with higher resolution) and from your iPad (with lower resolution), you can set a different standard panel layout for each device.

2.3 CONFIGURE QUICK SEARCH & BATCH PANEL

On the left side of a standard list view you see a panel which is used to perform quick searches within the relevant module and to execute batch actions.

This panel consists of the following components by default:

- Global filters
These are saved searches that are available for all users within your organisation. This allows one person in your organisation to save an (advanced) search filter once, which can then be easily retrieved from the module by other users. The further functioning is explained further on in this manual.
- Personal filters
These are saved searches that are created by you and only for you. This allows you to save an (advanced) search filter once, and easily retrieve it at a later time. The further functioning is also explained further on in this manual.
- Other filters
Most of the modules have some additional commonly used filters available on the left-hand side. For example, filters for quickly selecting by status. These filters can also be used as batch actions. The functioning of this is explained further on in this instruction manual.
- Other batch actions
Finally, some specific batch actions are available that are not available as search filter. For example, adding a candidate to an email group or to 'action containers'. The functioning of these batch actions will be explained further on.

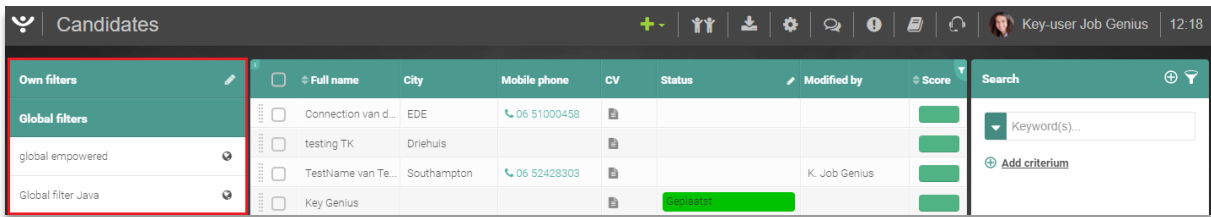


Fig. 3– Quick search & batch panel

You can decide which items are displayed in this panel, and the order in which they appear, by following these steps:

1. Click the Configuration icon at the bottom right of the quick search & batch panel. A special Configuration mode will open. You will see all the functions of the panel available for this module.
2. To the left of each item you will see a switch. If this is switched to the left (green) this item is 'enabled' and is therefore displayed. If this is switched to the right (grey) this item is 'disabled' and is therefore hidden. Enable or disable the switch by clicking it.
3. To the right of each item you will see a Drag icon. By hovering your cursor over such an icon, your cursor (normally an 'arrow') changes into a symbol indicating that you can move the item. Now drag the item to the desired position by clicking it with your mouse, holding and dragging it to the desired location, where you drop it.
4. Once you have made the above changes, click the Return icon at the bottom right of the quick search & batch panel. You are now back in regular mode.

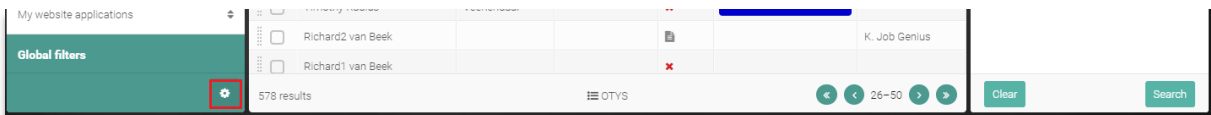


Fig. 4– Configuration icon in the quick search & batch panel

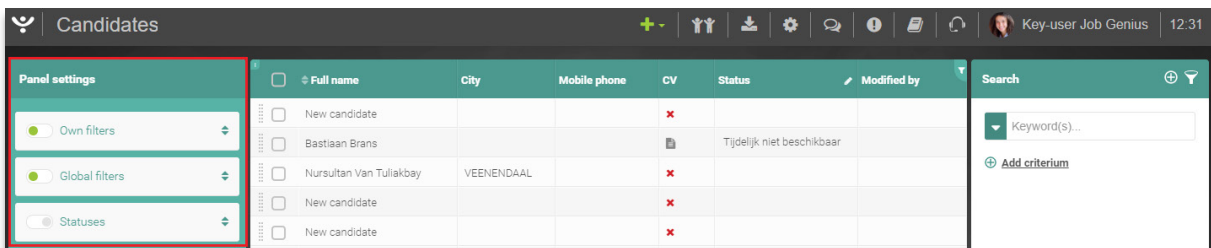


Fig. 5– Configuration mode of the quick search & batch panel



Fig. 6– Return icon in configuration mode of the quick search & batch panel

Your preferences as to whether or not to display items and their order are automatically linked to your OTYS account per module. So you do not need to save them separately.

2.4 CONFIGURE LIST PANEL

2.4.1 GENERAL

A list panel is at the centre of your module. For example, upon opening your Candidates module, you will see a list of candidates that are within your search criteria (with one candidate per line). You are able to set the data displayed in this list (the 'columns') within the available columns for the relevant module. It is also possible to create multiple list views and simply change them when you see other data in lists at certain moments during your process.

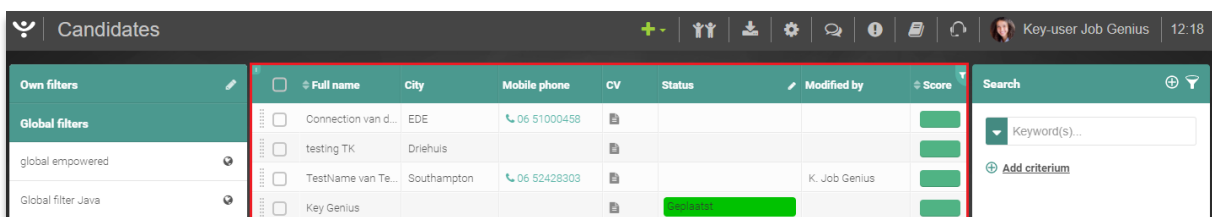


Fig. 7- List panel

2.4.2 CREATE NEW LIST VIEW

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

1. Click at the bottom of the list on the name of the current list view (usually the 'Standard view', but it can also have another name).
2. A window with all available views will open. Click on the 'New view' button in the bottom right corner of the window.
3. A window with the new view (which should still be configured) will appear:
 - a. Enter a recognisable name for the list 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 list 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. On the right are the columns that are currently part of the new list view (these are the 'standard columns'). Click the arrow next to a column to move it to the left and thus remove it from the list view.
 - d. On the left are the columns that are currently not part of the new list view. Click the arrow next to a column to move it to the right and thereby add it to the list view. Because this list on the left may be a long list, there is a filter at the top that allows you to easily search this list.
 - e. After all desired columns have been added to the right side, you can adjust the order by using the Move icon to the right of a column. Simply drag the column to the right

position. The column at the top of this list will later appear on the far left of the actual list.

4. After you have set the above settings, click the 'Save' button.

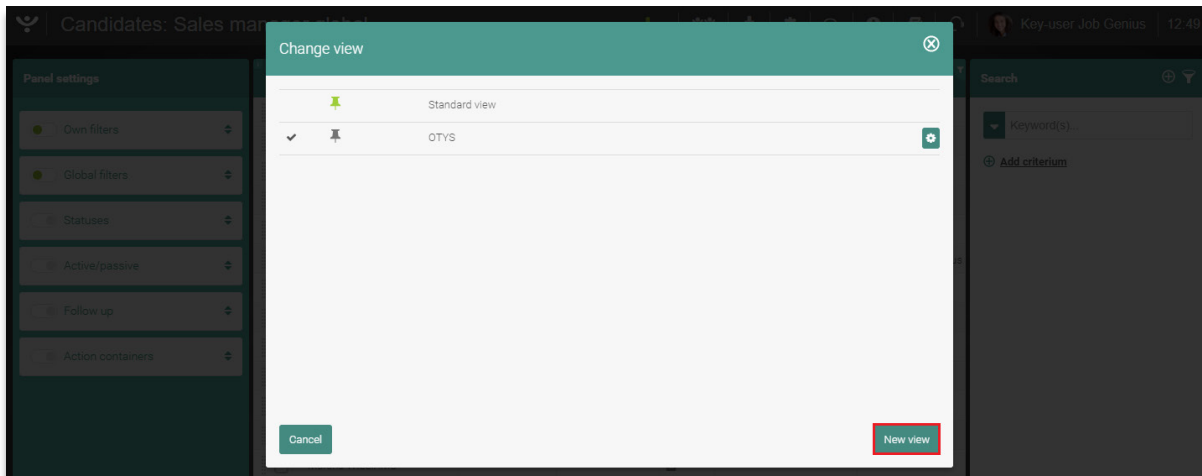


Fig. 8– Current list views and 'New view' button

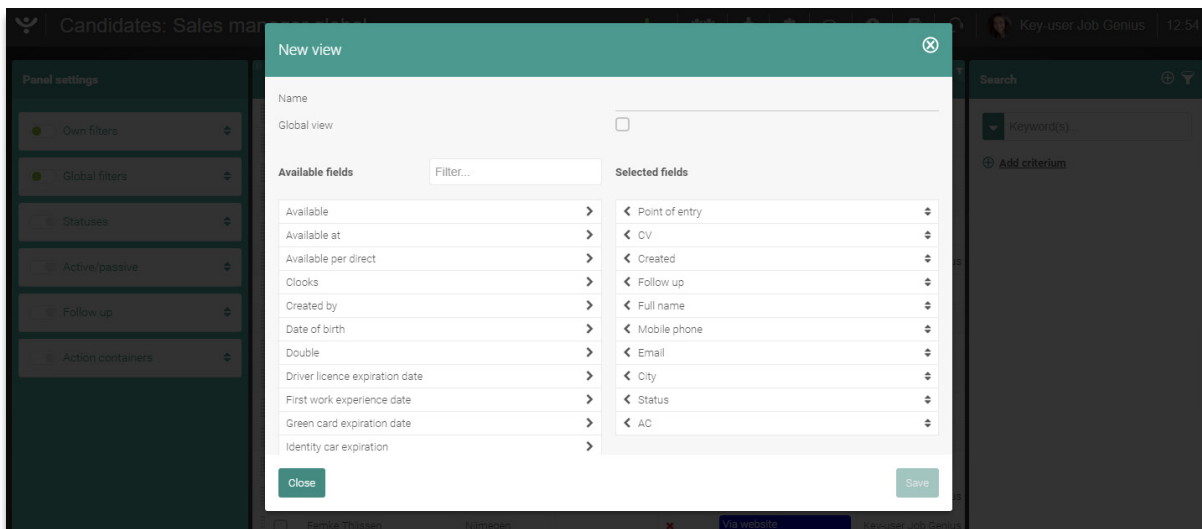


Fig. 9– Creating list view

You will automatically return to your list which will be based on the layout just created. Also, the newly created list view will be immediately set as your standard view. If this is not desirable, you can adjust your standard list view (see paragraph 2.4.5).

From this list view it is also possible to arrange the columns in a different order. Just click on the top (header) row of a column and drag it to the desired location. It is also possible to adjust the width of a column. To do this, click in the top (header) row in the space between two columns (until the cursor changes) and drag the column to the desired width.

The 'ideal' list view is partly dependent on the data that is important to you in a particular module, and also on your screen resolution. If you have a higher screen resolution you have more space to place columns than if you have a lower screen resolution.

Perhaps you will have to 'fiddle around' with the settings in order to arrive at the perfect list view for your situation. With the aforementioned tick at 'Global', you can then share this list view with your colleagues. Assuming that they have a similar screen resolution they only need to set the list view you created as standard (see section 2.4.5).

2.4.3 ADJUST EXISTING LIST VIEW

Adjusting an existing list view is very similar to creating a new list view:

1. Click at the bottom of the list on the name of the current list view (usually the 'Standard view', but it can also have another name).
2. Click the Configuration icon on the right side of the list 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. Make the changes in the list view as explained in section 2.4.2 and click 'Save'.

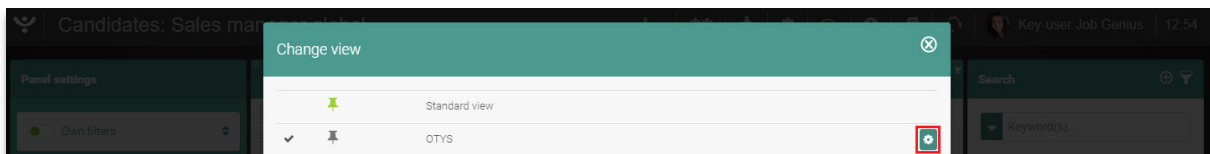


Fig. 10– Configuration icon of existing list view

The changes to your list view have now been made and your adjusted list view will open automatically. Also, the newly created list view will be immediately set as your standard view. If this is not desirable, you can adjust your standard list view (see paragraph 2.4.5).

2.4.4 DELETE EXISTING LIST VIEW

It is also possible to delete an existing list view. Take the following steps to achieve this:

1. Click at the bottom of the list on the name of the current list view (usually the 'Standard view', but it can also have another name).
2. Click the Configuration icon to the right of the list 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. Click at the bottom right on the 'Delete' button.

The list view is now deleted and you will return to your current list view.

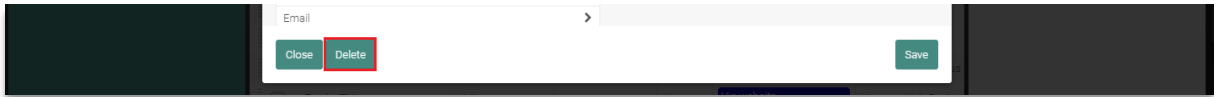


Fig. 11 – 'Delete' button for existing list view

2.4.5 DETERMINE STANDARD LIST VIEW

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

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

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

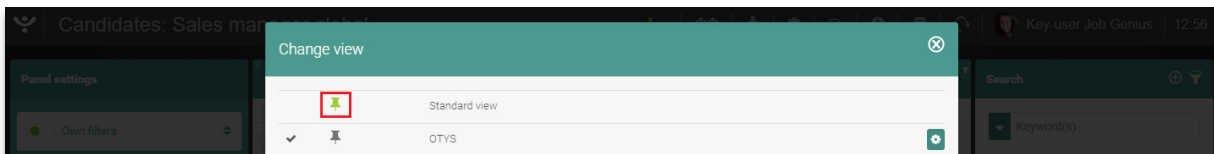


Fig. 12 – Drawing pin icon for standard list view

3 | USE OF LIST VIEWS

3.1 INTRODUCTION

In the previous chapter we explained how the left panel (quick search & batch actions) and the centre panel (the list) can be adapted to your situation. In this chapter we explain how to use these components in daily practice.

This chapter is divided into four sections:

- Search with quick search & batch panel
- Batch actions with quick search & batch panel
- Batch actions by right-clicking
- Switch between list views

3.2 SEARCH WITH QUICK SEARCH & BATCH PANEL

The left panel can be used to quickly search your database. This can be done by saving an advanced search and then quickly retrieve it, or by filtering your current results, for example by status. Quick search is simple:

1. Click on the left side on the search filter/criterion (e.g. 'Personal filters')
2. Then click below it on the item you want to search (e.g. 'My candidates')

The search will be loaded immediately and the list will be refreshed. In addition, you will always see your current search in the panel on the right.

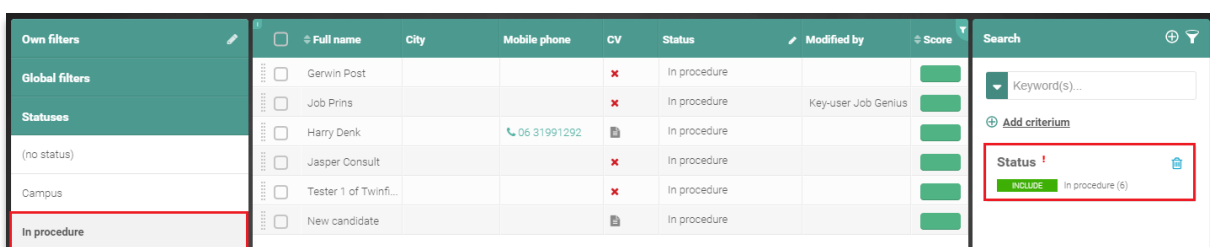


Fig. 13– Search with quick search & batch panel

There are two sections with predefined search filters: 'Global Filters (which apply to all users) and 'Personal filters' (which apply only to you). Section 4.5 explains how to create these. If you select one of these filters you will always overwrite your current search filter.

Most modules have additional search options in the left panel. For example, you can search your Candidates module on active/passive, status and follow-up. If you search with one of those options, it is added to your current search. For example, if you have created a search of all active candidates,

you can quickly add the status 'Availability' (on the left) to your search. Similarly, you can load a filter and then search for an (extra) status.

If you are searching multiple sections, the search is by default AND. So if you search Candidates for 'Active' (from active/passive) and status 'Available', you will by default only see candidates who are active AND have the status 'Available'. If you choose multiple options in a section, the search is by default OR. So if you search Candidates for 'Active' (from active/passive) and status 'Available' & 'Via Website', you will by default only see candidates who are active AND have the status 'Available' OR 'Via Website'.

With the search panel on the right you are able to change this behaviour through additional options. This is explained further in Chapter 4 .

3.3 BATCH ACTIONS WITH QUICK SEARCH & BATCH PANEL

Besides performing quick searches of your database with the left panel, it can also be used to execute batch actions. Again, this is very simple:

1. Make a selection of items for which you want to execute a batch action.
2. Select those items for which you want to execute a batch action. You can select all items from the current page using the icon at the top of the list.
Note: Your search results may consist of multiple pages. You can increase the number of items per page using the page navigation on the bottom right, and thus execute a batch action for a larger group.
3. On the left side, click on the section for which you wish to execute a batch action (for example 'Status')
4. Then drag the selected items by dragging the Selection icon to the left of one of the items to the batch action you want to execute (for example, to status 'Available' to give all selected candidates the status 'Available').
5. You will be asked to confirm. Click the 'Yes' button.

The batch action has been completed and the selected items have been adjusted.

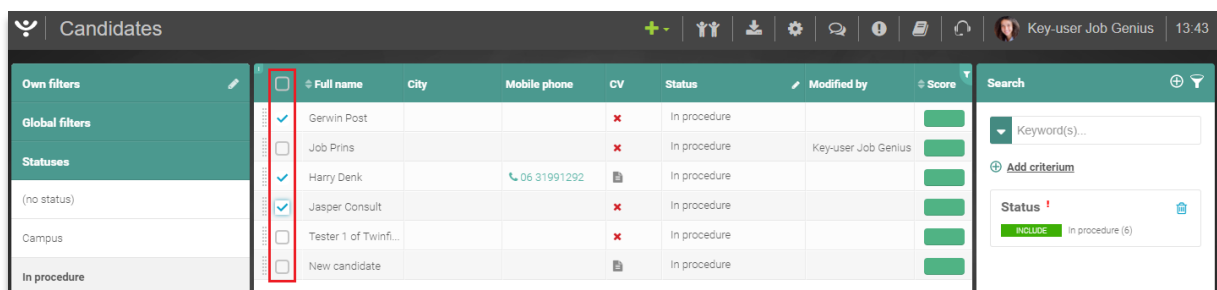


Fig. 14– Selection of candidates for batch action

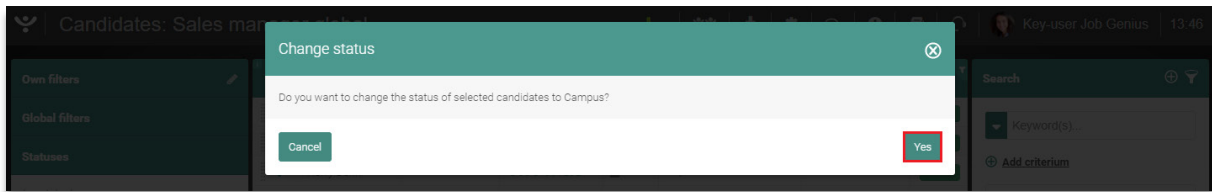


Fig. 15– Confirming a batch action

3.4 BATCH ACTIONS BY RIGHT-CLICKING

It is also possible to execute batch actions by right-clicking the selected items in the list. This works similarly to the aforementioned option, but obviously slightly different.

1. Make a selection of items for which you want to execute a batch action.
2. Select those items for which you want to execute a batch action. You can select all items from the current page using the icon at the top of the list. Here too you must take care to verify that all items are displayed on the current page.
3. Right-click one of the selected items. A context menu with the possible batch actions will appear. Select the desired batch action.
4. Depending on the chosen batch action, an additional option may be given (for example, to select the desired owner when changing the owner).
5. You will be asked to confirm. Click the 'Yes' button.

The batch action has been completed and the selected items have been adjusted.

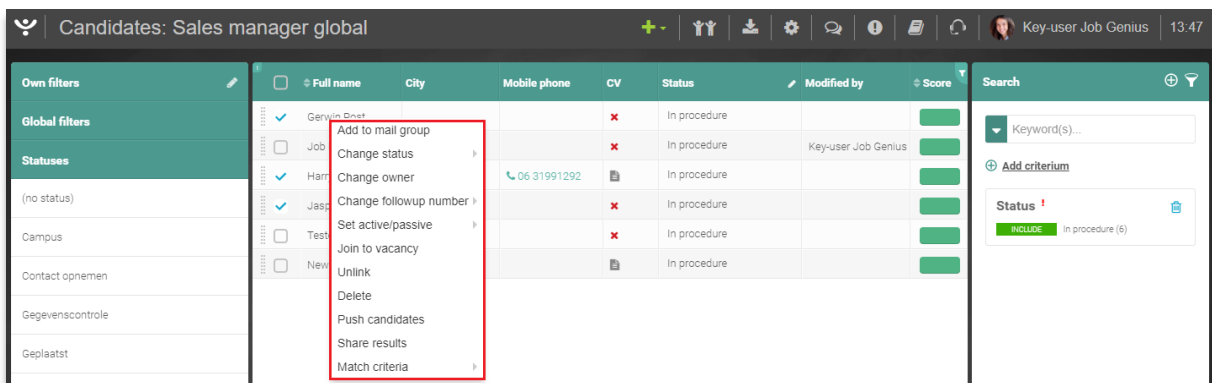


Fig. 16– Batch action by right-clicking

3.5 SWITCH BETWEEN LIST VIEWS

We explained how to configure list views in section 2.2. This allows you to create multiple views that show only the columns that are relevant for you at that time. After you have done this you can easily switch between list views:

1. Click at the bottom of the list on the name of the current list view (usually the 'Standard view', but it can also have another name).
2. Click the list view you want to start using.

The selected list view will now open automatically.

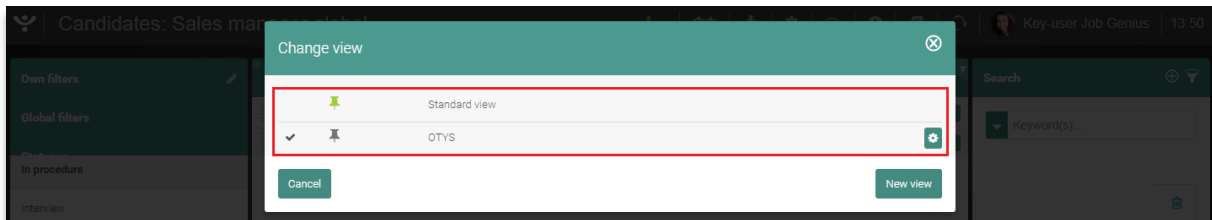


Fig. 17– Switching between list views

Switching between list views in this manner only affects your current session. If, tomorrow, you log into your OTYS Go! system, the standard list view will appear. Section 2.4.5 tells you how to adjust your standard list view.

Many columns in list views are 'sortable'. This is indicated by the Sort icon to the left of a column name. By clicking it you will sort your search results in this column (if, for example, you do this with a date field, the items in the list will be sorted from newest to oldest). By clicking again, the sort order will be reversed (so, in the aforementioned example from oldest to newest).

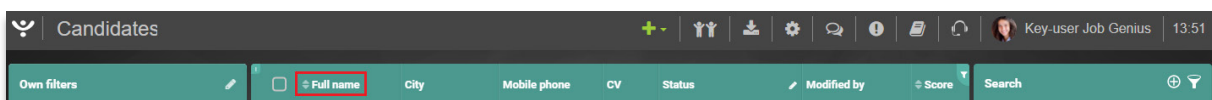


Fig. 18– Sort symbol in list view

3.6 ADJUST ITEMS FROM LIST VIEWS

In some columns it is also possible to directly adjust an item on a list from the list view. One example is the status in the Candidates module. These columns can be identified by the Pencil icon to the right of the column name.

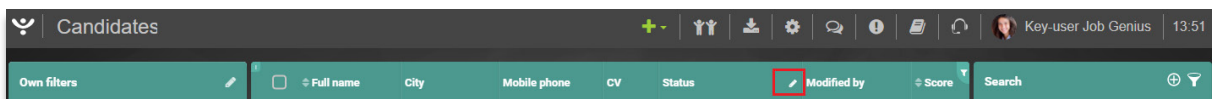


Fig. 19– Change icon in list view

By clicking on the Pencil icon, the column changes to 'Change' view. By then clicking a cell in the list (for example, a status in the candidate list) you will be able to change the data directly from the list. Changes will be saved immediately without you having to click the 'Save' button.

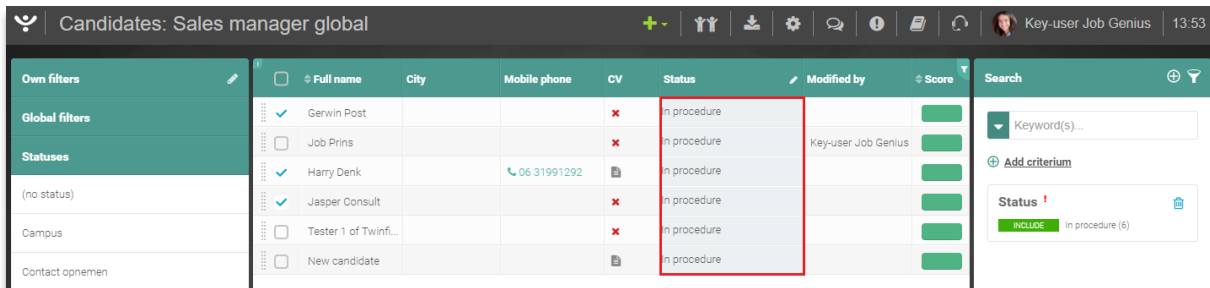


Fig. 20– Change mode in list view

3.7 NAVIGATE THROUGH PAGES

A search can of course produce many results, especially if you have a large database. The results are therefore not always displayed on a single page by default, but on multiple pages.

In the bottom left corner of your list you will see the total number of results of your current search. In the bottom right corner of your list you will see the number of items currently displayed. For example, you are working in the Candidates module. On the left you see '128 results', while at the bottom right it says '1 - 25'; this means there are 128 candidates that meet your current search criteria and you currently see only candidate 1 to 25. To the left and right you see buttons to browse the list in the following order: 'first page', 'previous page', 'next page', 'last page'. Buttons that are not applicable are displayed in grey (after all, on the first page the buttons 'first page' and 'previous page' are irrelevant).



Fig. 21– Page navigation in list view

It is also possible to adjust the number of items to be displayed per page. Just click on the indicator of the current items (e.g. '1 - 25'). Here you can set the number of results per page to '25', '50', '75', '100', '250' and '500'. Our advice is to leave it set to '25' (loading more data takes longer after all, and is not always necessary), but in specific cases it may be useful to show more items per page.

It is also possible to go directly to a specific page. Again, click on the indicator of the current items (e.g. '1 - 25'). You can then specify the page you want to 'jump' to at 'Go to page'. If you have set 25 items per page and go directly to page 5, you will see items 100 - 125 of your search results.



Fig. 22– Additional options page navigation

4 | SEARCH & MATCH

4.1 INTRODUCTION

You will usually use the list views for searching the right information. It may be that you are simply looking for a company on the basis of the company name, but it could also be that you are looking for candidates who meet the (complex) criteria, which should be a sign that they are a match for a vacancy. In the previous chapter we explained how you can use the left panel to quickly search for common aspects such as 'Status'. In this chapter we explain how to use the right search panel to search for quite a number of additional aspects in your OTYS Go! system.

This chapter is further divided into five sections:

- Search by keyword
- Search by criteria
- Adjust a search
- Save a search
- Match

4.2 SEARCH BY KEYWORD

At the top of the search panel on the right side of your screen you see an option to search by keyword. When you open a module you will often be looking for a specific item (such as a specific candidate, vacancy or company). That is why the keyword search field is already 'active' when opening a module, so that you can search by keyword immediately without having to click the field.

After typing the keyword (or keywords) we will immediately search the database for items that correspond to the appropriate keyword. You do not need to press enter or press the 'Search' button to start your search.

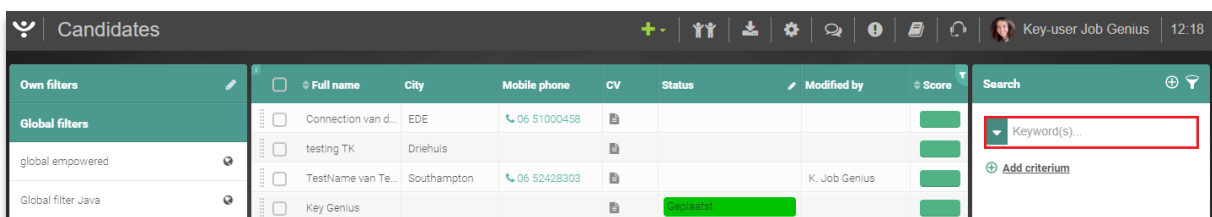


Fig. 23– Searching by keyword

By default we only search for complete words. For example, when you are searching for 'penny' in your Candidates module, your search will only return candidates with keyword 'penny' and no candidates with keyword 'pennypacker'. If you do not remember whether the candidate you're looking for has 'penny' or 'pennypacker' as a surname, you can use an asterisk (wild card). By searching for

'penny*' both the candidates with keyword 'penny' and 'pennypacker' (but also 'pennygrabber') will be found.

If you are searching for multiple keywords, we by default search OR. So if you search by keyword for 'henry pennypacker', we will search for candidates based on keyword 'henry' OR 'pennypacker'. Because the results are by default sorted by relevance, the candidate 'Henry Pennypacker' (if present in your database) will probably be shown at the top. So, if you are looking for candidate 'Henry Pennypacker' but do not remember whether the surname is 'Penny' or 'Pennypacker' it is best to search with 'henry penny*'.

After you search with a keyword, this keyword will appear in the right search panel of the current search. In some modules you can click the keyword to open a window where you can adjust the search options for this specific keyword:

- At 'Keyword' you see your (previously) entered keyword.
- At 'Search in' you can specify which fields should be searched. In this way you can ensure, for example, that when searching for candidates, the search extends to the documents (Word and PDF) in the candidate file.
- At 'Search type' you can specify how the search should be performed when using multiple keywords:
 - All words
This means that all the words have to be present in the returned items. For example, you are working in the Candidates module, searching for 'product manager' with All words. Then both the words 'product' and 'manager' will be present in the returned candidate data.
 - Exact phrase
This means that all the words have to be present in the exact order in the returned items. For example, you are working in the Candidates module, searching for 'product manager' with Exact phrase. Then the exact phrase 'product manager' will be present in the returned candidate data.
 - One of these words
This means that at least one of the words must be present in the returned items. For example, you are working in the Candidates module, searching for 'product manager' with One of these words. Then the word 'product' OR the word 'manager' will be present in the returned candidate data.
 - None of these words
This means that none of these words may be present in the returned items. For example, you are working in the Candidates module, searching for 'product manager' with None of these words. Then the word 'product' AND the word 'manager' will not be present in the returned candidate data.

- Actonomy operators

You can do a boolean search of your database with this option. More information about the options is listed below.

- In 'Keywords + criteria' you can indicate whether, when you are looking for keywords and criteria (see section 4.3), returned items must meet both the keyword search and the criteria search; or, whether a candidate who meets either one should also be displayed in the search results.
- At 'Synonyms' you have the option to select whether you want to search for similar keywords in our database with synonyms. If you do not want to use our synonym database but want to use your own synonyms, choose 'Actonomy operators' for 'Search type', and perform a boolean search.

Once you have entered your preferences, click 'Add to search' and your (custom) search will be executed immediately, and the custom results will appear in your list.

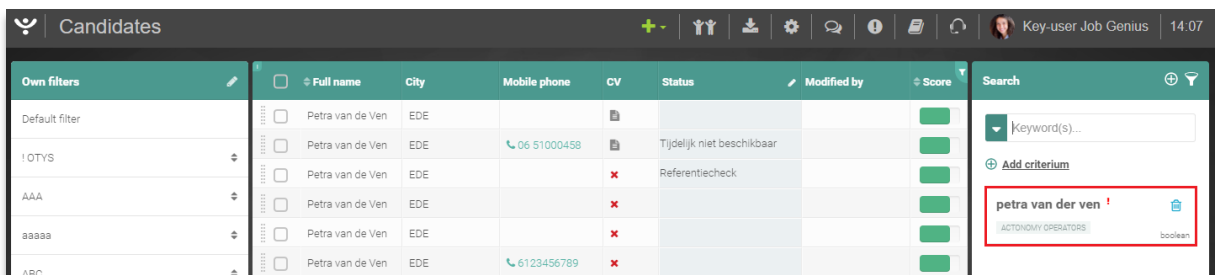


Fig. 24– Keyword in current search

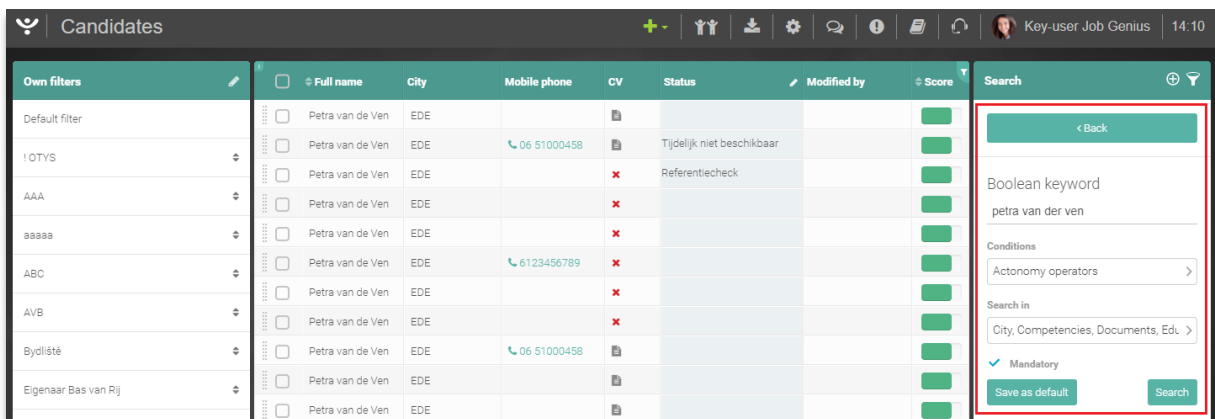


Fig. 25– Additional options for keyword searches

When searching on the basis of Actonomy operators you have the following options:

Item	Function	Example
keyword*	Searches for combinations of letters and/or numerals. This need not be a complete word.	sales* = you are searching for all words containing the letter combination 'sales'. Results can then include, for example: 'Sales Manager' or 'salesperson'.
ke?word	Searches for all words with any letter or number on the place of the question mark.	?ury = will return the keywords fury and bury.
-keyword	Excludes the results that contain the keyword.	-manager = you get NO results containing the word manager. Please note! You must always enter a keyword or criterium that should be present.
+keyword	Makes the keyword required.	+manager = you will ONLY get results in which the word manager occurs
"keyword keyword"	Searches for the exact combination of letters and numbers in the order specified.	"sales manager" = you get ONLY the results that contain the combination "sales manager". Candidates with data with a different spelling ('salesmanager') are NOT included in the results.
Keyword AND Keyword	Searches for the presence of both keywords.	HPE AND manager = you will receive all results that contain both the word HPE and the word manager.
Keyword OR keyword	Searches for the presence of one of the two keywords.	HPE OR SE = you will receive all results that either contain the word HPE or the word SE.
keyword^number, keyword^number	Weighs the importance of the keywords in relation to each other. The higher the number, the more weight is given to the word.	HPE^1, sales^2 = The results will be sorted. The results that contain the word 'sales' appear at the top.
keyword~	Searches for the keyword and the most common spellings.	neighbourhood~ you get, in addition to the results for the spelling used, also the results for 'neighborhood'. Please note! This operator can not be used at the start of a search.
"keyword keyword"~10	Searches for two keywords at a distance of a number of words from each other.	"manager london"~5 = you get results for which the word manager is at less than five words distance from the word london.

4.3 SEARCH BY CRITERIA

Besides searching with keywords, you can also search with criteria. For example with statuses, characterisations, match criteria, CRM criteria, but also distance. To search by criteria you take the following steps:

1. Click the button 'Add criterium'
2. A list of available criteria will open. Click the criterium by which you want to search. When needed you can easily find a particular criterium with the filter at the top of the list of criteria.
3. A window will open to determine how to search. This screen may vary per search criterium (for example, when searching by distance, you must specify the country, postal code and search radius), but in most cases it consists of the following components:
 - a. Search
Select the options you want to search for. Some options mention the number of results within your current search that meet the criteria between brackets. Say you already did a search that returned 250 candidates. You search further by function group and you see the option 'ICT (56)'. This means that of the current 250 candidates in your search results, 56 are in function group 'ICT'.
 - b. Exclude
You will find the same options as for a search, but here you select the criteria you want to exclude. If you select 'ICT' for a search for candidates by function group, all candidates with function group 'ICT' will be excluded from your search results.
 - c. Required
When searching with multiple search criteria (e.g. match criterium 'Function group' and 'Region'), you can use this option to specify if the search criterium is mandatory. You will not see results that do not meet the current criterium.
 - d. All options required
When selecting more than one option at 'Search', this will be executed as an OR search by default. If you select both 'ICT' and 'Finance' for 'Function group', the search results will include both ICT and Finance candidates. If you tick this option, only candidates who meet all the selected criteria at 'Search' will be returned.
4. After selecting from the above options, click the 'Add to search filter' button to add this search criterium to the current search. You will then automatically return to the overview screen containing the current search and the list will be automatically refreshed based on the adjusted search.

When selecting search criteria, some search criteria that do not generate results in the current search may be hidden. Say you performed a search that returned 25 candidates. You want to continue searching within the results, based on match criterium 'Function group'. This option will only be displayed if at least one of the 25 candidates have selected a value at 'Function group'. The same applies to the values within 'Function group'. If this is not the case then there is no point in showing this search option (because we know in advance the result will be 0 entries).

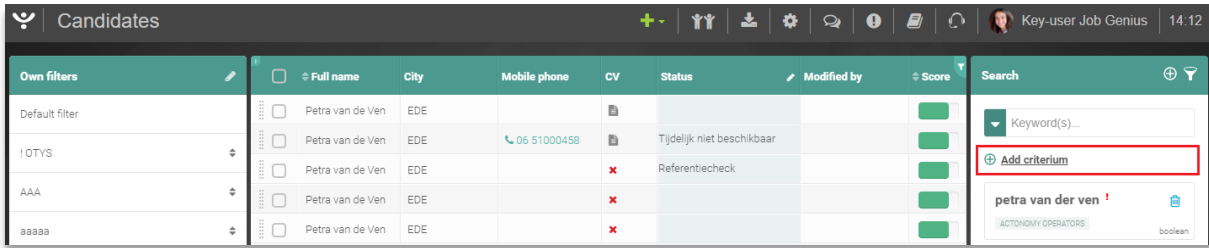


Fig. 26– Adding a criterium to a search

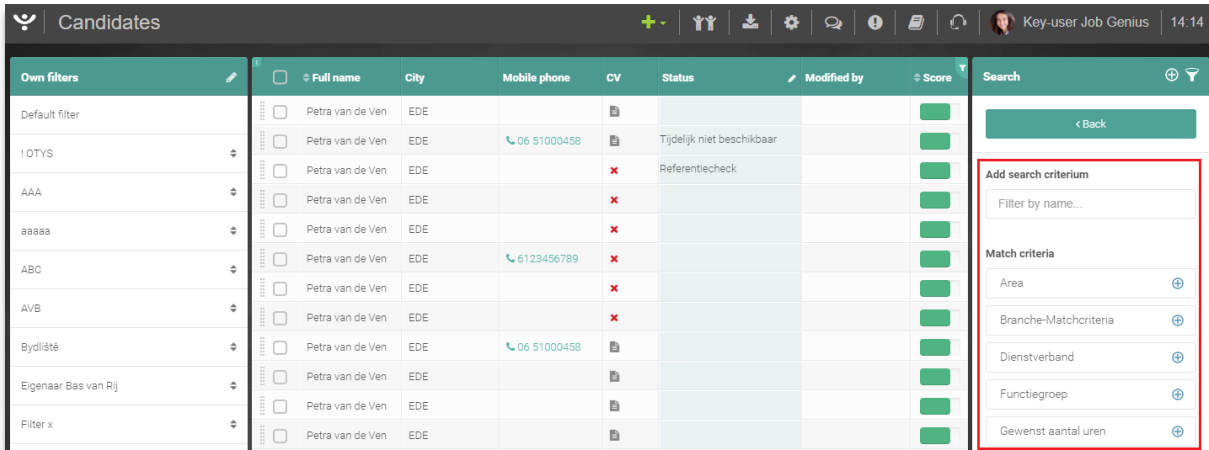


Fig. 27– Searching and selecting a criterium

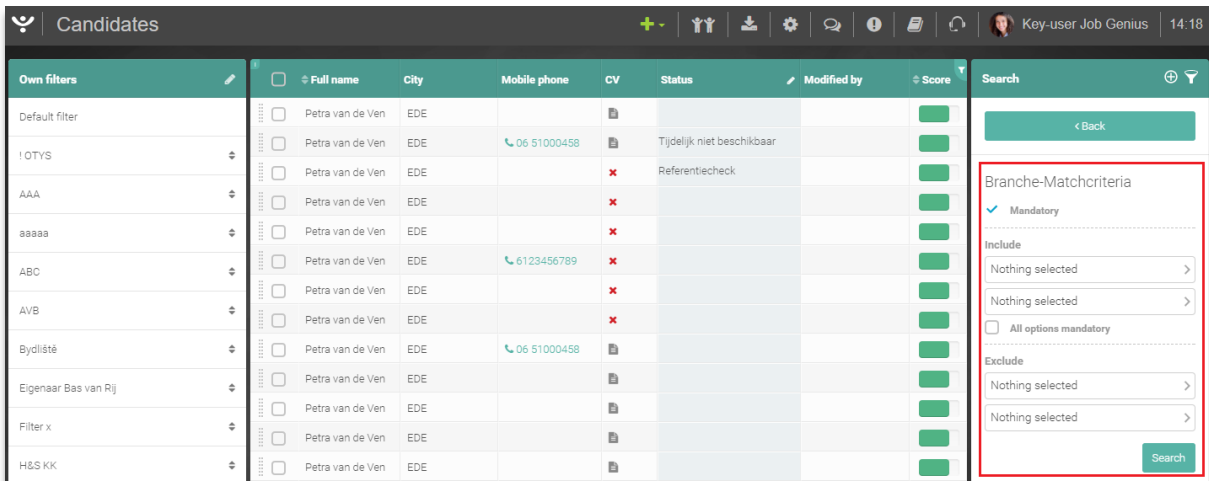


Fig. 28– Options for searching by criterium

4.4 ADJUST A SEARCH

The right panel shows your current search. This may consist of multiple components (e.g. a keyword and three criteria). Every component of your search is displayed in a separate block. It is possible to customise your search using one of the following options:

- To customise a search criterium in your search, click on the block of the search criterium. This will open the 'details' of the search criterium. These are similar to the previously explained options. After changing these options, click 'Add to search filter' to make the changes to your search filter. The list will be automatically refreshed based on the adjusted search.
- To remove a search criterium in your search, click on the Delete icon in the block of the search criterium. The search criterium is then removed from your search and the list will be automatically refreshed based on the adjusted search.
- To reset your search to your standard search, click on the icon to the right of the 'Add criterium' button. Your current search will disappear entirely and your standard search will be loaded. In most cases, this is 'everything', but you may have chosen to set it up in a different way (see next section).

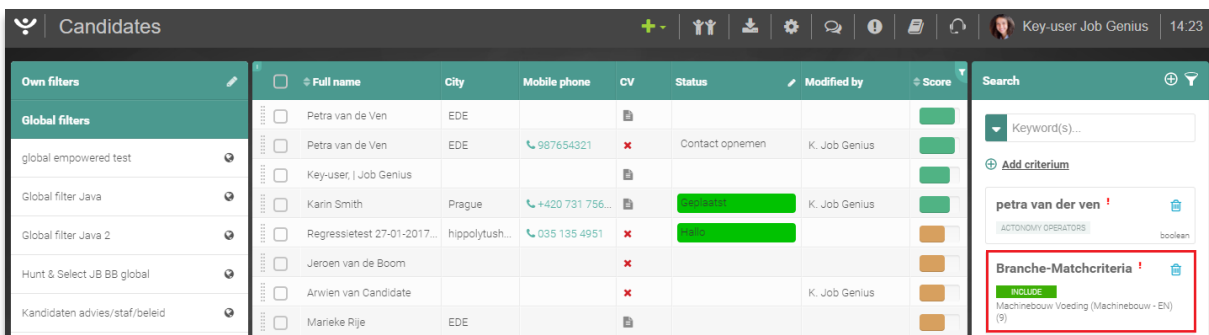


Fig. 29– Adjusting search criterium

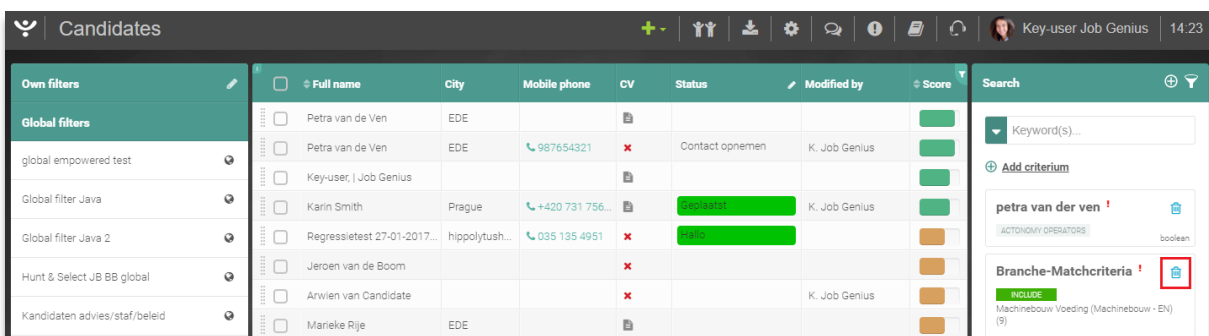


Fig. 30– Deleting search criterium

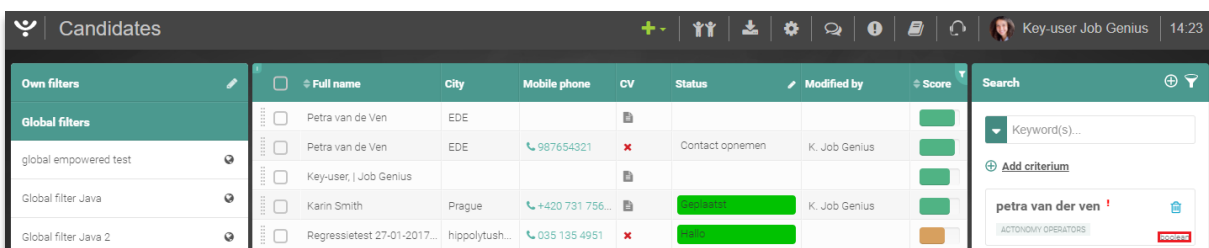


Fig. 31– Resetting search criterium to standard

4.5 SAVE A SEARCH

If you have done an (advanced) search, you can save your search. This can be done in two different ways:

- You can create a 'standard filter'. This allows you to load this filter by default when you access OTYS Go! and open a module. This is useful, for example, when you work in your Candidates module and only want to see active candidates in your name by default.
- You can save multiple filters and name them. It is also possible to make filters available to your colleagues (provided you are authorised to do so). This can be useful if, for example, you do the same (advanced) search regularly.

In both cases, you will first have to do a search that you need to save (see previous sections).

To set your current search as the standard search filter, take the following steps:

1. Click at the top of the search panel on the icon 'Set as standard filter'.
2. You will be asked to confirm. Click the 'Yes' button.

Your current search filter is now set as your standard search filter.

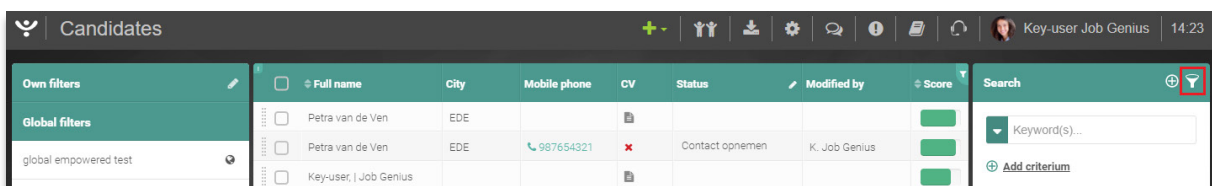


Fig. 32– Setting standard search filter

To save and name your current search (so you can easily retrieve it at a later time), take the following steps:

1. Click at the top of the search panel on the 'Create filter' icon.
2. Enter a familiar name (to you) for the search filter at 'Name'.
3. Tick 'Global' if you want to make this filter available to your colleagues.
Please note: Only specific users have authorisation to create global filters. If you do not see this option you may request an activation using a support ticket.
4. Click the 'Create' button

The search filter will be created and appear in the left panel under 'Personal filters' or 'Global filters' (if the box 'Global' was ticked). If you want to delete a personal or global filter, click the Delete icon next to the appropriate filter in the left panel. If you do not have permission to create global filters you will also not have rights to delete global filters.

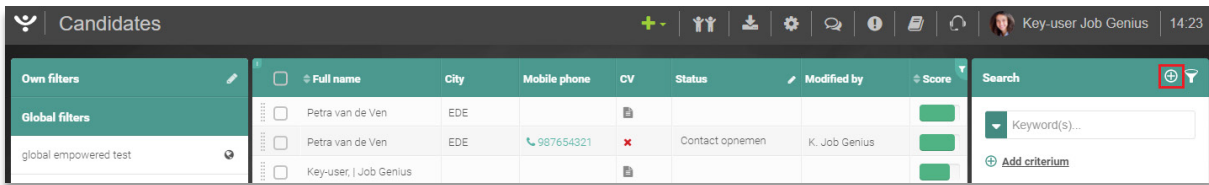


Fig. 33– Saving search filter

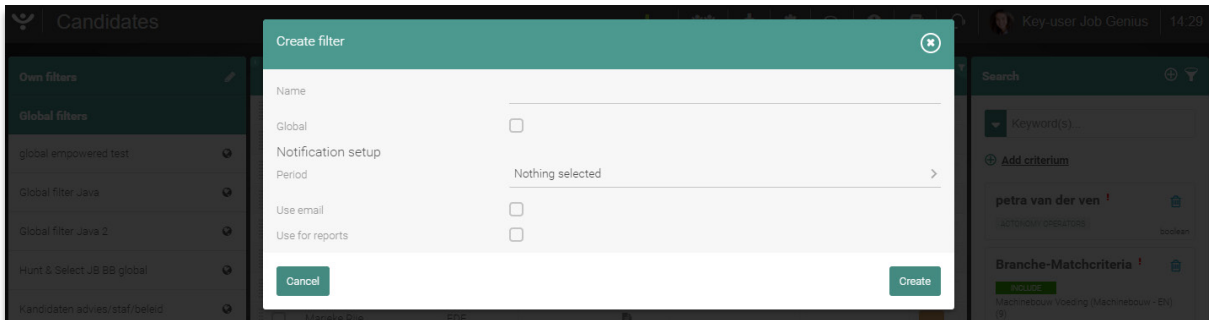


Fig. 34– Saved search filter settings

4.6 MATCH

In addition to searching your database, it is also possible to 'match'. This process is similar to searching, but when you are matching, the match criteria of the item you are working on are used to search for items of another entity with similar criteria. You can match in the following ways:

- **Match a candidate to suitable vacancies**
By setting match criteria for both candidates and vacancies, you can search for suitable vacancies during a candidate's intake session.
- **Match a candidate to suitable relations**
By setting match criteria for both candidates and relations, you can search for suitable relations during a candidate's intake session, even if there is no suitable vacancy.
- **Match a candidate to suitable contacts**
By setting match criteria for both candidates and contacts, you can search for suitable contacts during a candidate's intake session, even if there is no suitable vacancy. This may be an alternative to the aforementioned option, especially for larger organisations. For relation 'ING Bank', maybe all function groups apply, but by setting match criteria at contact level you can directly search for the contact at 'ING Bank' who has something to offer to the candidate.
- **Match a vacancy to suitable candidates**
By setting match criteria for both vacancies and candidates, you can search for suitable candidates when a vacancy opens up.
- **Match a vacancy to suitable relations**
By setting match criteria for both vacancies and relations, you can search for suitable

relations when a vacancy opens up. This might come in handy if you are working with a large number of suppliers, for example.

To start the matching process, click at the top of a candidate or vacancy on the 'Match' button and then choose the desired matching method. A new tab will open automatically, and the match criteria of the entity in which you were working (e.g. the match criteria for a specific vacancy) are used to search the target entity (for example, search for candidates with similar match criteria). You will see this search on the right side of the screen and you can adjust it (as explained in the previous sections). By default, all criteria are mandatory, but this is easily adjusted.

If you are searching from candidates to vacancies, or vice versa, then you also have a batch option to match selected candidates or vacancies automatically. This allows you, for example, to make a match with suitable candidates from the vacancy 'Product manager', adjust the search where needed and then batch match candidates to the relevant vacancy.

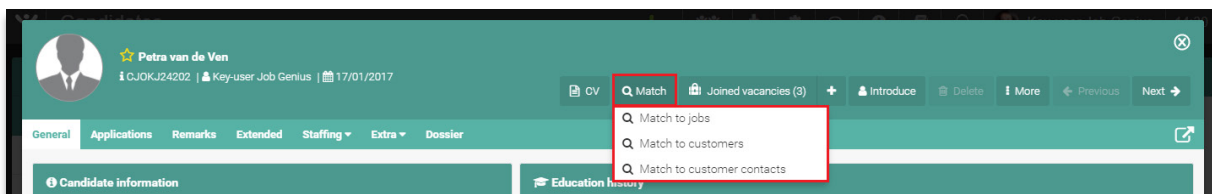


Fig. 35– Matching from candidate

