



# PLACEMENT MODULE MANUAL



OTYS Recruiting Technology





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# 1 | INTRODUCTION

## 1.1 ABOUT THE PLACEMENT MODULE

The Placement Module is a module especially for organisations that place candidates/employees on a temporary/project basis. In this module you can create and edit new placements and keep an overview of all the details of the candidate/employee who has been placed. The placement collects all the relevant details of both the candidate and the client and all the agreements made. For example, in the placement you can record data relating to salary agreements, time sheets, reimbursements and placement costs.

## 1.2 PURPOSE OF THIS MANUAL

The purpose of this manual is to familiarise you with the Placement Module and show you how best to use the module to manage your placements. We show you how to create and edit placements and what placement information you can track.

## 1.3 STRUCTURE OF MANUAL

This manual starts with an explanation of the added value of the Placement Module in the introductory chapter. It then discusses the features of the module.

A distinction is made between:

- Basic functions
- Entering details on your placement
- Performing actions with your placement

## 2 | BASIC FUNCTIONS

### 2.1 SEARCH AND FILTER

In order to retrieve the right placement in the long list of placements in your system, you can use the advanced filter and search functionality in OTYS Go! You can find the search function in the right-hand panel of your screen. Here you can add multiple criteria to find the right search result. If you want to use this combination of search criteria more often, you can save the search as a filter. The filter can then be found in the left-hand panel of your screen, so that you can carry out your saved search with a single click at a later time. Instructions on how to best use these functions are given in the manual 'Lists, Searches and Matching'. We have chosen to describe this functionality in a separate manual, because the instructions are the same for multiple OTYS Go! modules.

### 2.2 EDIT YOUR LIST VIEW

Do you often work with the Placement Module and do you want to edit the columns in the overview? You can do this by clicking on 'Standard view' at the bottom of your screen. Here you can add, delete and change the order of columns. You simply save your new view so you can use it any time. Instructions on the best way to use this function are given in the manual 'Lists, Searches and Matching in Go!'.

### 2.3 CREATE A NEW PLACEMENT

To create a placement in the Placement Module, click on the green 'plus' icon at the top of the overview page. A drop-down menu will appear in which you can select the type of placement. Possible placement types are:

- Own staff
- Secondment
- Hiring in - hiring out
- Freelance
- Interim
- Recruitment
- Assignment

It is also possible to automatically create a placement based on the editing of a procedure status. If you have linked a candidate to a vacancy and, for example, you change the status to 'Placed', OTYS can automatically generate a placement. The advantage of this is that the placement is immediately linked to the right candidate, client, contact person and vacancy.

If a placement is not automatically generated when changing a linking status, this will still have to be set in the workflow. You do this by creating a global workflow where 'Start if' is set to 'Procedure status changed'; with a workflow rule with condition 'PRO: If procedure status X is equal to ...' (with the correct procedure status selected) and if action 'PLA: Create placement'. More information about workflow settings can be found in our manual 'OTYS Go! Workflow Module'.

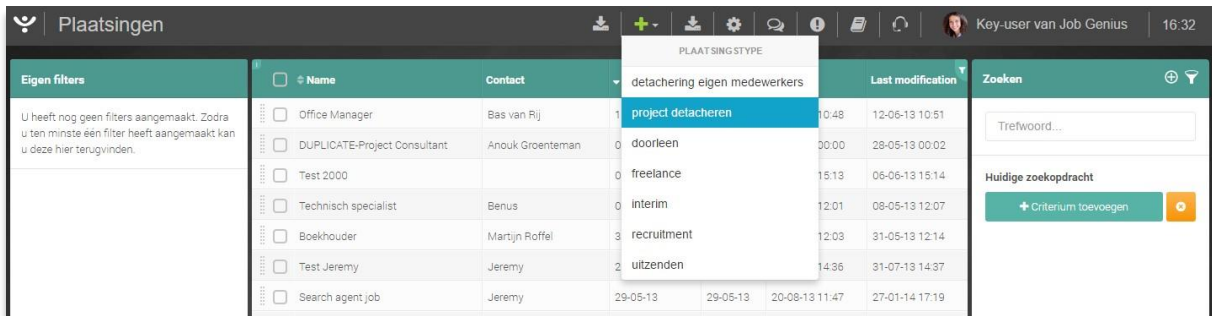


Fig. 1 – Create new blank placement

## 2.4 EXPORT PLACEMENTS

At the top of your screen you can find a button with the 'Export' symbol. This allows you to export the overview of your placements to an Excel file. You can use a new or a previously created template for this. Here you can specify which fields you want to export, and in which order.

### 3 | ENTER PLACEMENT DETAILS

Each discipline is different, and each recruiter is different. You are the only person who can determine which information is relevant to you. Additionally, everyone has their own way of working and we at OTYS want to facilitate that. In order to give you as much control over your placements database as possible, we have made the complete layout and content of the detail screens adaptable. This means you can determine exactly which information is relevant to you and you want displayed. You can also decide which information you want to display where and on which tab. We did this by placing the information in different widgets. For example in the 'Time sheets' widget where you store information and settings for a candidate's time registration. If time registration is very important to you, you can simply place that information on the first tab at the top. This allows you to see this immediately when you open a placement. The 'Detail views' manual helps you to set up your own detail screens.

Of course you can also use the standard view setting that we provide. We did our best to organise this as logically as possible. You can start using this immediately. If you move your mouse over the green bar of a widget in the detail view of a placement, a pencil appears in the upper right corner. Click on this to edit the information in the widget.

Then click on the 'Disk' symbol in the top right corner to save your changes. This works the same for all widgets.

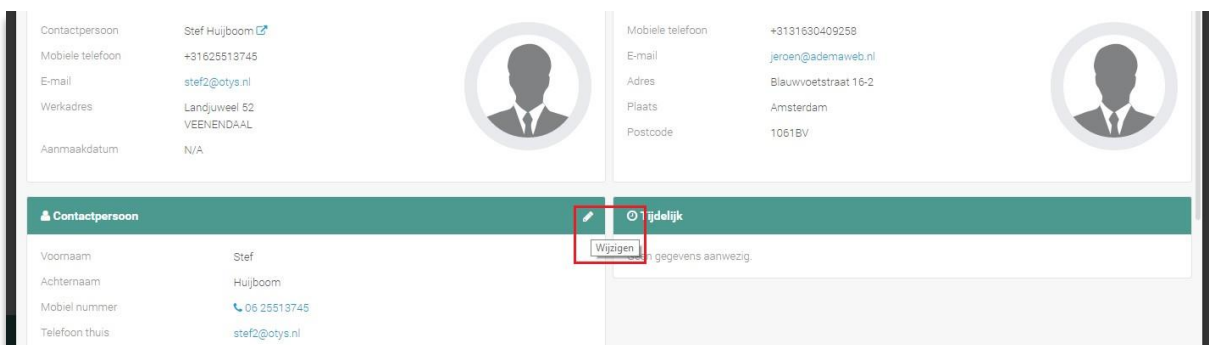


Fig. 2 – Change placement information in the detail screen

All the relevant information about a placement can be entered into the system using the following widgets:

- **General overview**

This widget gives you an overview of various factors that influence calculations made. Here you will find, for example, 'Salary', 'Margin', 'Reimbursements' and any 'Deductions'.

- Extra fields  
This widget displays additional fields that you defined at an earlier time.
- Placement information  
In this widget you can enter all the basic information about the placement.  
Available fields include  
'Start and end date', 'Sector', 'Currency' and 'Trial period'.
- Placement time registration  
Here you can edit the settings with regard to time registration. For example, the number of agreed working hours and when a person will be paid.
- Placement workplace  
Enter all sorts of additional information about the candidate's workplace.
- Calculations  
Add calculation factors here, such as the extra percentage paid for overtime. These calculation factors are displayed in the time registration.
- Candidate's address  
Enter all of the candidate's address details here.
- Candidate ID and permits  
If you have information about driving licence, passport or other personal data such as a residence permit, you can enter it here.
- Seconded candidates  
Enter the details that apply specifically to seconded candidates. For example salary and payment period.
- Candidate salary savings or life course savings  
If a candidate has salary savings or life course savings, you can enter the details here.
- Candidate financial details  
Information about the candidate's bank account can be entered here.
- Candidate flight details  
Here you can enter flight details, such as desired travel class.
- Freelance candidate address  
Enter the work address of your freelance candidate in this widget.
- Candidate healthcare and insurance  
Enter information about the candidate's health insurance and any other insurance policies they may have.
- Candidate details  
Here you can enter all the candidate's basic details such as name, contact details, date of birth, marital status etc.
- Candidate assignment  
Enter the details that apply specifically to temporary workers. For example salary and payment period.
- Client contact details  
Enter the contact details of your contact person here.



- Client financial details  
In this widget you can enter all the information about payment conditions and invoicing for your client.
- Client details  
Enter client name and client number.
- Client invoicing address  
Enter you client's invoicing details
- Client work address  
Enter you client's work address. You can choose the address from the list of known addresses for this person.
- File  
Here you will find the candidate's complete file. All emails, calendar appointments, notes, but also documents such as CVs can be added and displayed here. By means of filters and keywords you can determine which items are displayed. In order to make optimum use of the full functionality of the file, you can read the 'Files' manual.
- Deductions  
Here you can enter deductions, such as a personal contribution for a laptop or mobile phone.
- Position financial details  
Here you enter all financial information about the candidate's job position. How many hours per working week, invoicing period, etc.
- Position details  
In this widget you can find all the information about the linked vacancy.
- Position contact  
In this widget, select your contact person at the client.
- Position work address  
Enter you client's work address. This is an open input field.
- Candidate overview  
In this widget you will find the information about the linked candidate.
- Lease vehicles  
Does the candidate have an ongoing lease contract and for how long? You can enter the details in this widget.
- Margin overview  
In this widget you will find the actual and estimated margin.
- Sales overview  
In this widget you will find the actual and estimated sales.
- Placement reminders  
Create reminders for yourself here, for example, so you will be notified a month before the end date that the placement will end.
- Client overview  
In this overview you will find all the data for the linked client.

- Time overview

In this widget you will find the actual and estimated time.

- Reimbursements

If a candidate currently receives reimbursements for lunch, travel costs or the use of a mobile phone, you can enter the details here.

## 4 | PERFORM ACTIONS WITH YOUR PLACEMENT

### 4.1 CALCULATE SALARY, RATE AND MARGIN

If you want to calculate the salary of your placement, including rates or margin, you can use the built-in calculator function. You can find this at the top of your screen in the green bar under the 'Calculator' button. Here you can enter the gross salary, the rate and the margin. You can also find options for calculations per hour, day, four weeks, month or year.

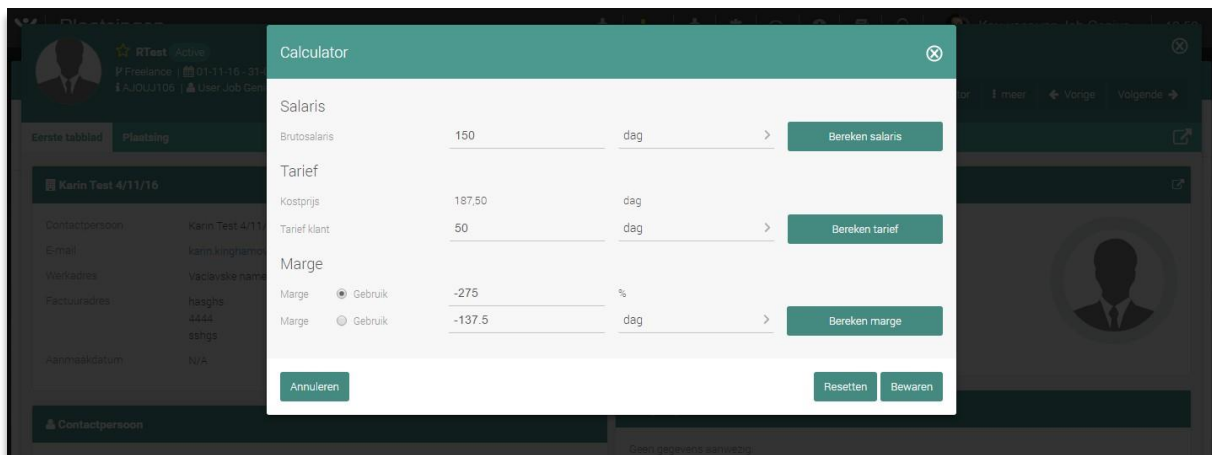


Fig. 3 – Calculate salary, rate and margin

### 4.2 VALIDATION OF A PLACEMENT

Before a placement becomes definite, it needs to be validated. This means that the system checks whether the previously defined mandatory fields have all been completed. If this is not the case, you can do this directly in the validation screen. Placements that have not yet been validated have the status 'Pending'. To validate a placement, click on the 'More' button in the top right corner of your placement detail and then select 'Validate'. You can enter and save missing data here if necessary. If all (mandatory) data has been entered, you can validate the placement in this screen.

The status after validation depends on the configuration of your system. If no approval is required for placements, a placement will immediately be given the status 'Active' after it has been validated. If approval is required, a notification email will be sent to the supervisor selected in the 'Placement information' widget. This supervisor can then check the placement details (e.g. whether the salary and rates are correct). To approve a placement, the supervisor clicks on the 'More' button in the top right corner of the placement detail and then selects 'Approve'. The status of the placement is then automatically changed to 'Active'.

### 4.3 EDIT AN ACTIVE PLACEMENT

Unlike new placements with a 'Pending' status, you cannot make any changes to the current version of an active placement. However, you can create a new version of the placement. You may want to do this, for example, if the placement is being extended or if anything changes in the employment conditions. You do this by clicking the 'Versions' button in the green bar at the top of your screen. Then click on 'New version'. This will reload the screen. The details from the first version will be copied to the new version where they can be modified. For example, if you want to extend the placement, you only have to edit the end date. With the 'Versions' button you can also switch between different versions.

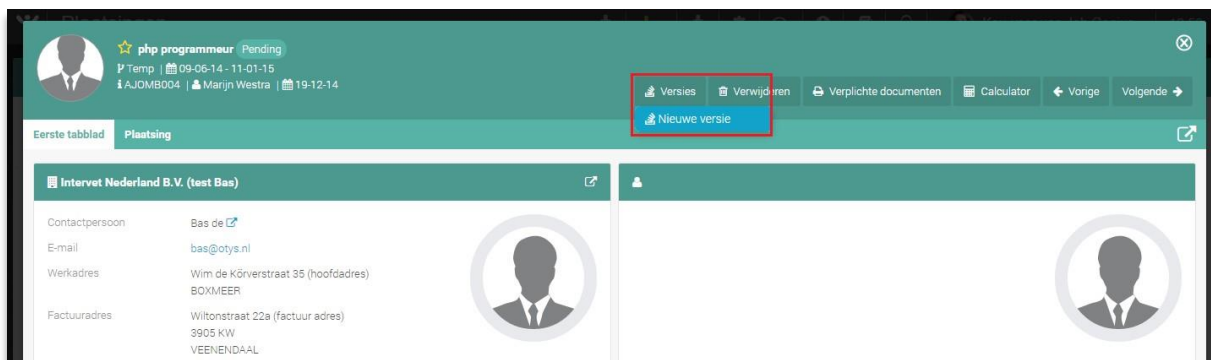


Fig. 4 – Create new version for editing

### 4.4 END ACTIVE PLACEMENT

If you want to end a placement manually, follow these steps:

1. Click 'More' in the green bar at the top of your screen.
2. Click 'End'.
3. In the window that appears, edit the end date.
4. Click 'End placement'.
5. This changes the status of your placement to 'Closed'.

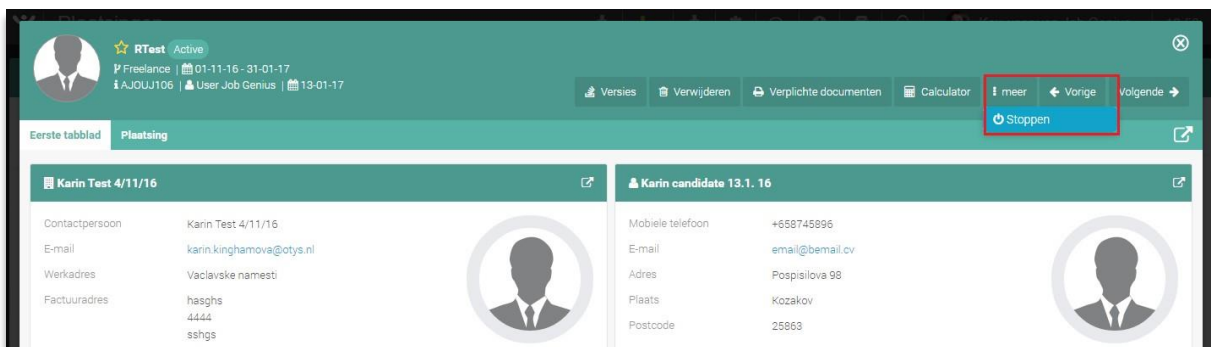


Fig. 5 – End active placement