



PROCEDURES MODULE

INSTRUCTION MANUAL



OTYS Recruiting Technology



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1 INTRODUCTION

1.1 ABOUT THE PROCEDURES MODULE

The Procedures module is where the Vacancies module and the Candidates module meet. The Procedures module displays all the links between vacancies and candidates. These unique links occur, for example, when a candidate responds to a vacancy through your website. But also if you manually join candidates to this vacancy. We call these links and the steps to be taken during the recruitment process procedures. The Procedures module allows you to easily see which candidates are joined to a specific vacancy and at what stage in the recruitment process they are. With the advanced filter and search functionality you can quickly find the desired combination of candidate and vacancy, and you can easily change the status of the respective candidates in batch, for example.

1.2 PURPOSE OF THIS INSTRUCTION

The Procedures module is designed to give you an overview of all ongoing procedures and to save you time by allowing you to change multiple procedures simultaneously. In this instruction manual we show you how you can best do this and how to leverage this module.

1.3 INSTRUCTION STRUCTURE

After this introduction, we will first show how you can easily search and filter within the procedures. Then there are several actions you can execute on one or more procedures simultaneously. We will show and explain these actions.

2 | BASIC FUNCTIONS

2.1 SEARCH AND FILTER

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

2.2 OPEN CANDIDATE OR VACANCY FROM THE OVERVIEW

You can quickly click through to the candidate or vacancy associated with the procedure from the overview. Just click on either the candidate's name or the title of the vacancy. If you click on the procedure from another area, you can directly change the match status of the procedure.

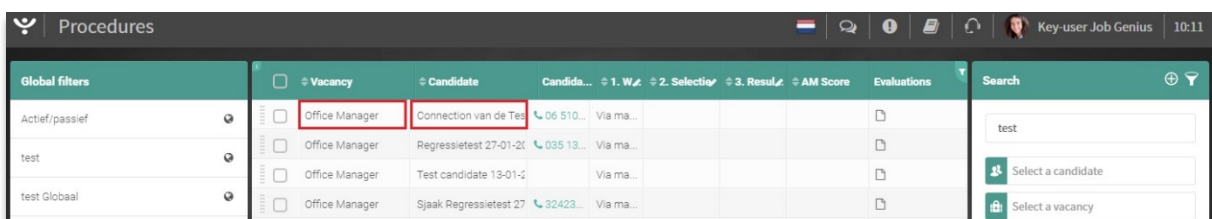


Fig. 1 – Click through to vacancy or candidate from overview

2.3 ADJUST YOUR LIST VIEW

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

3 | EXECUTE ACTIONS ON PROCEDURES

If you found the procedure(s) you were looking for you can execute actions on them. For example, click on a procedure to change the match status directly from the overview. You can also execute actions on multiple procedures at the same time:

1. Do this by selecting multiple procedures via the check boxes at the beginning of each line.
2. Right-click one of the selected procedures to see the available batch actions.
3. The batch action you select will apply to all selected procedures.

You can also execute actions on a single procedure. To do this, use your right mouse button as well. You do not need to tick the box for this.

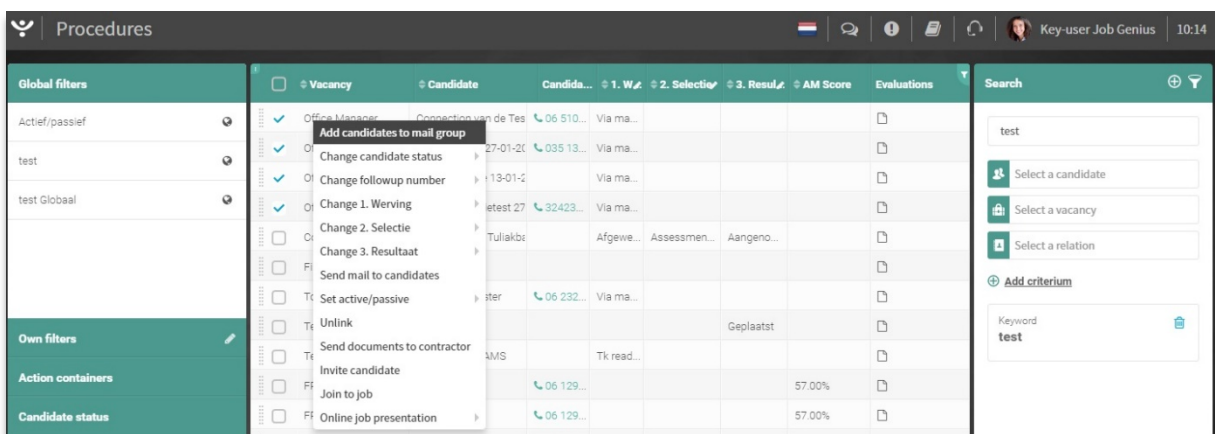


Fig. 2 – Execute actions on one or more procedures simultaneously

You have the following options when you right-click:

- **Add candidates to email group**
Add multiple candidates simultaneously to a previously created email group. For example, a list to which you regularly send vacancies in a particular professional field.
- **Edit candidate status**
For example, change the status from 'Contact' to 'Reject' for several candidates simultaneously.
- **Change order**
This function can be used to rearrange the list order of your candidates. For example, give all your top candidates a '1' rating to distinguish them easily and quickly from the rest.
- **Send email to candidates**
Allows you to, for example, reject several candidates at once or invite a group for recruitment day.

- Unlink
Here you can unlink the candidates from the vacancy for multiple procedures at once.
- Send documents to contact
Use this option to send documents, such as a CV, to the client associated with the vacancy.
- Join to vacancy
This feature allows you to simultaneously join multiple candidates to a vacancy. After you click, a window will appear in which you can search the vacancy, then click 'Join'.
- Online vacancy presentation
This function allows you to quickly send the online vacancy presentation to the candidate. The system will generate an email with a link to the online vacancy. If you have multiple websites, you can select from the drop-down menu in which website template the online vacancy presentation should be displayed. You can also choose whether the email should be sent directly in the background, or if you want to edit it first before you send the mail manually.

