REMINDERS MODULE

INSTRUCTION MANUAL

OTYS Recruiting Technology

CONTENT

1 | INTRODUCTION

1.1   ABOUT THE REMINDERS MODULE

Proper scheduling hinges on whether it is actually observed. The Reminders module is designed as an additional aid to always help you remember actions that you want to be reminded of. This instruction manual tells you what the Reminders module entails exactly, and how to use it.

1.2   INSTRUCTION OBJECTIVE

These instructions are intended for OTYS clients, to enable them to use and configure the Reminders module in OTYS Go!

1.3   INSTRUCTION STRUCTURE

After this introduction we will explain the available functions and possible actions you can execute in the Reminders module:

- Create reminders
- Edit reminders
- Filter reminders

2 | REMINDERS

2.1 CREATE REMINDERS

The overview of the Reminders module contains all the reminders (future, today and past) that are planned or have taken place. You can create new reminders in the following way:

1. Click the green '+' symbol at the top of your screen.
2. A new reminder will open. Enter a subject, the date you would like to receive a reminder, who needs to be reminded and whether this person should receive a mobile notification (when using the app) or an SMS, and give the reminder note a description.
3. Click 'Save' to save the reminder.
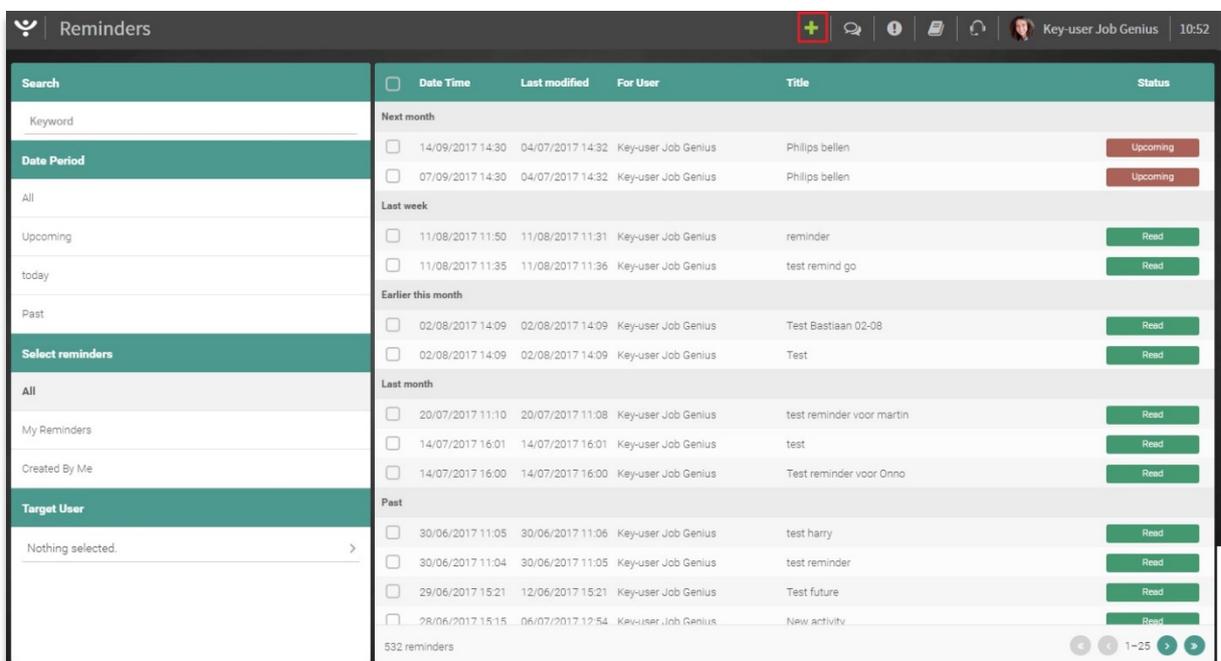
Fig. 1. – Overview screen of the Reminders module, with the button for creating new reminders.

2.1.1 CREATE REMINDERS FROM A DOSSIER

Reminders can also be added directly from a dossier. This function is available for various OTYS Go! modules and can be set in the same way for all. To set a reminder from a dossier, go to a specific module for which you want to set a reminder, for example, the Candidates module. Open an item and then click on Dossier' to open the dossier. The dossier will open and you can then create a new reminder by clicking on the 'Bell' icon. More information on the dossier can be found in the Dossiers instruction manual.
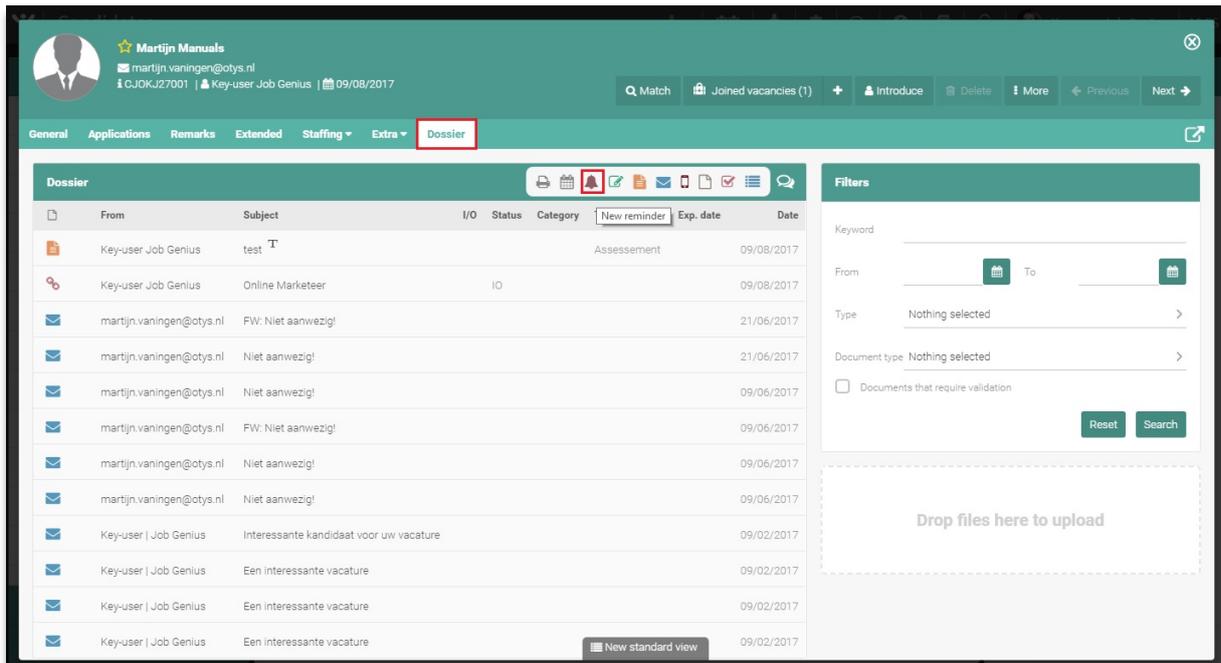
Fig. 2 – Create a reminder from a dossier.

2.2   EDIT REMINDERS

Reminders can be edited in the detail view of the module. Edit a reminder in the following way:

1. Click the reminder you want to edit.
2. The same window will open when a new reminder is created, however, this reminder already contains the previously entered data. You can now edit the reminder.
3. Click 'Save' to save changes or 'Delete reminder' to remove it.

2.3   MANAGE REMINDERS

A notification message of the reminder will appear on the screen. By clicking on this message you go directly to the reminder so that you can delete, delay or edit it.
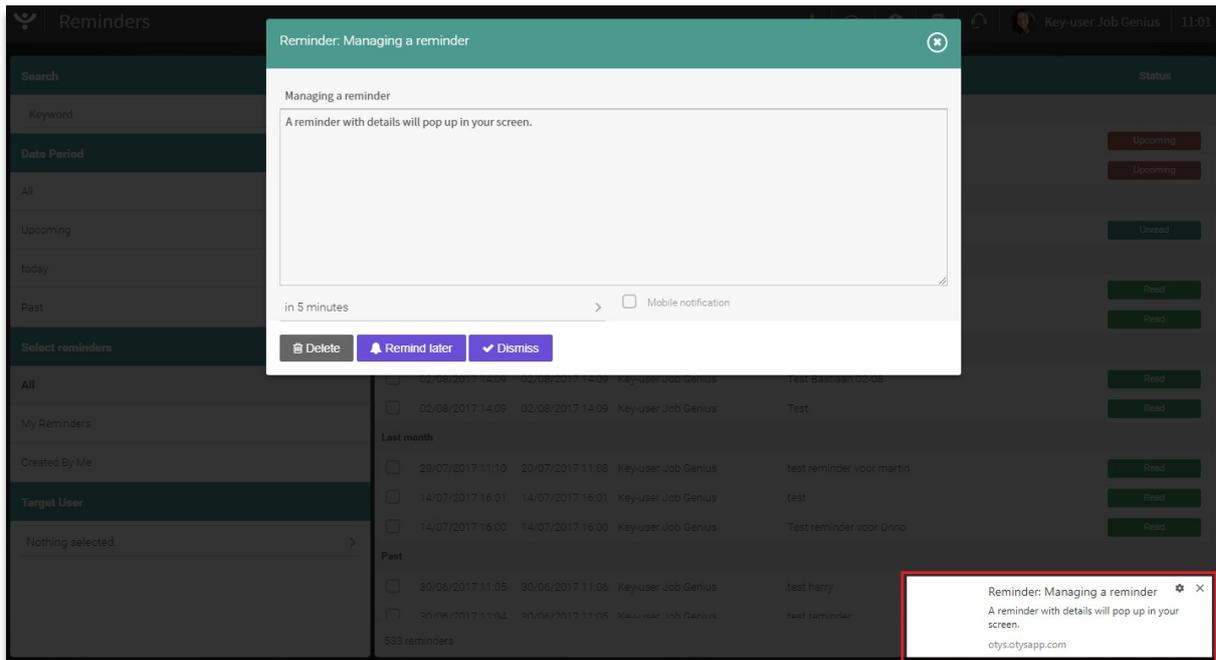
Fig. 3 - Notification message of a reminder and managing a reminder.

2.4 FILTER REMINDERS

On the left side of your screen you can filter reminders. This function allows you to quickly retrieve specific reminders. Filtering reminders can be done in four ways.

2.4.1 SEARCH BY KEYWORD

With the header 'Search' you can do a targeted search for reminders in the system.

1. Click 'Keyword' in the top left corner under the header 'Search' and enter the keyword(s) you are searching for.
2. Press enter; all reminders with the appropriate word will be filtered.

If multiple words are entered, then OTYS Go! will search for the exact combination of words as entered.

2.4.2 DATE PERIOD

With 'Date period' you can display reminders by date. Reminders in OTYS Go! are automatically set to 'All', which includes future, today's and past reminders. You can specify the time period by clicking on 'Future', 'Today' and 'Past'.

2.4.3 SELECT REMINDERS

Using this function you can filter the reminders you want displayed.

- <u>All</u>

  Select all reminders in the system for which you are authorised.

- <u>My reminders</u>

  Select the reminders that are for you.

- <u>Created by me</u>

  Select the reminders you have created.

2.4.4 ASSIGNED USER

This function allows you to filter a reminder for a particular user so that you can immediately see reminders of the person you are looking for.

2.5 STATUS OF A REMINDER

OTYS Go! automatically assigns a status to reminders:

- <u>Future</u>

  The reminder has yet to take place.

- <u>Read</u>

  The reminder has been opened by the assigned user so that it is treated as read.

- <u>Unread</u>

  The reminder has not been opened by the user.

2.6 REMINDERS ON THE DASHBOARD

The widget 'Reminder' on the dashboard is designed to quickly add reminders. In addition, the widget clearly displays all reminders of a particular period. For the exact operation of the widget and how to set it, please read the Dashboard module instruction manual.