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opportunities.**

Together

Manual OTYS Go! Partner settings Version 1.1

A manual for external parties integrating with OTYS to synchronize settings between OTYS, the partner and the client using the OTYS Go! Partner settings.

Version management

Below you will find an overview of the versions available for this document.

Version	Date	Author	Description
1.0	19-12-2022 - 23-12-2022	Bastiaan Brans	Created initial version of document, including number chapters: 'General' (chapter 1), 'Activation & configuration' (chapter 2) & 'Technical implementation' (chapter 3).
1.1	29-03-2022	Bastiaan Brans	Updated incorrect paragraph numbers for 'Register as a partner' (2.1.1) & 'Creating a partner setting' (2.1.2). Updated paragraphs 'Retrieving a specific partner setting' (3.2) & 'Updating a specific partner setting' (3.3) describing the possibility to change partner settings on a website level.

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1. General

In this chapter we will provide you some generic information about OTYS, the OTYS Go! Partner framework and the OTYS web services (OWS).

1.1 OTYS Recruiting Technology

OTYS Recruiting Technology (hereafter 'OTYS') develops, maintains and optimizes software for around 1.000 clients worldwide. The core of this software is created for recruiting purposes (agencies, corporate recruitment & job boards).

The most important elements of the OTYS solution are:

- OTYS Go!
This is a browser based software solution in which the main users (for example recruiters) of the client work on a daily basis. Each client has a client specific URL from which they access OTYS Go! (<https://clientprefix.otysapp.com>). Users then login using either their OTYS username & password or using an external SSO option (for example Azure). After they are logged in, they will have access to the modules & functionalities based upon the permissions assigned to their account.
- Website
In most cases the client also has one or multiple websites linked to their system. This is normally a website which is publicly available (so that the company can for example use it to show & tell more about their company and publish their jobs), with some portals behind a login (for candidates, customers, hiring managers and/or suppliers). This website will interact with the OTYS system and can do so in several ways (for example the main website build, hosted & maintained by a third party and portals build, hosted & maintained by OTYS).

1.2 OTYS Go! Partner Framework

OTYS believes it should focus on the elements they excel in and that their focus should be on just that. Other parties are able to do other things better and OTYS believes that their clients are best helped by having a 'best of breed'-solution using partners. To support this 'best of breed'-solution for both clients & partners, OTYS created the 'OTYS Go! Partner framework' which allows partners to easily connect to the OTYS solution and provide users a nice (seamless) experiences.

The OTYS Go! Partner framework consists of the following elements:

1. OTYS Web Services (OWS)
OTYS has very extensive web services to connect to the OTYS system. Where other similar parties have web services as an 'add on' to their own application (with normally limited capabilities), OTYS chose to create a web service layer which is an integral part of their current software solution. All actions users take through the user interface (OTYS Go!) are done by OWS request, thus allowing external parties to connect with the web services and (technically) be able to do all the things end users are able to do through the GUI.
2. OTYS Go! Partner OWS Webhooks
If an external party connects to OTYS using OWS, there is always some kind of 'trigger' to exchange data. If this trigger should be based upon a user action in OTYS Go! (for example a user changing a status) , it is possible to create OWS webhooks. If configured, the partner can receive an 'active signal' that a user is taking the action. This way as a partner you are able to 'instantly' start a process if for example a user changes a status in the OTYS Go! system.

3. OTYS Go! Partner SSO

If an OTYS Go! user interacts with a partner functionality, it is probably a wise thing to add some kind of authentication. Larger clients will probably have an Active Directory (such as Microsoft Azure) set up to make user management & authentication work smoothly. Smaller clients will probably not have set this up, so for those we created an OTYS Go! Partner SSO functionality, which allows partners to automatically sync users with OTYS Go! users and to easily authenticate users using Single Sign On (with OTYS being the 'Active Directory').

4. OTYS Go! Partner widgets

In some cases a partner wants to be able to show data from their own system to users of OTYS Go! within the context of OTYS Go! (for example show additional information you have about a candidate within an OTYS Go! candidate detail). You might even want to add some 'interaction' in this context (for example a button to click or a form to be submitted). For these kinds of scenarios we have created OTYS Go! Partner widgets, which allows partners to provide iframe-ish content which can be loaded directly into the right context in OTYS Go!

5. OTYS Go! Partner custom actions

The above mentioned OTYS Go! Partner widgets can be of great added value if you want to show some information within the context of OTYS Go!, however if you have more complex ('full blown') interfaces or simply want to 'trigger a specific action', the widgets might not be the best choice. For these kinds of interactions we have created 'OTYS Go! Partner custom actions' which allows partners to create custom buttons which can be added on various places in the OTYS Go! system (for example in a candidate detail). Clicking this button will open a URL on your side (with for example the candidate OUID as a parameter) in the current browser tab, a new browser tab, a modal, an overlay or on the background.

6. OTYS Go! Partner settings

Having all the options mentioned above is great, however most partners & clients want to differentiate the offered options. Some partners might for example have multiple versions of their solutions (for example a 'Basic'-version and a 'Pro'-version). Some clients might want all their OTYS users to use the partner integration, while other clients want to have control on which OTYS users should be able to use the partner integrations. For this we have created 'OTYS Go! Partner settings' which allows us to have a mutual list of client, user & website settings between OTYS, the partner and (if desired) the client. These settings can be used for alternative behavior in the partner solution (for example only grant access if the option is enabled for the user) and simplify invoicing processes (for example monthly retrieve a list of users for which the integration is enabled).

1.2 OTYS Go! Partner settings

As mentioned above, we are having all kinds of capabilities for partners to integrate with OTYS. Most partners & clients want to differentiate the offered options (so not show the exact same options for every OTYS user). For this we have created 'OTYS Go! Partner settings' which is basically a mutual list of settings between OTYS, the partner and (if desired) the client.

There are three different use types of settings:

- Client settings

These settings define something about the client/OTYS environment. If you for example offer various types of packages to our mutual clients (let's say a 'Basic'- and a 'Pro'-version), you can use a client setting to define which package applies to the client.

- User settings
These settings define something about a specific user in the clients OTYS environment. If you for example want to limit usage to specific users, you can use a user setting to define if the user should have access (or not) to your integration.
- Website settings
To each OTYS client one or multiple websites can be connected. In some cases you want to define something on a website level. If you for example offer a service that shows something on the clients website in a specific color, you can use a website setting to define that color (so it can be different per website of the client).

The settings above are always available for both OTYS and you as a partner and can be used for two purposes:

- Changed behavior in integration
You can adjust the behavior of your integration based upon these setting. So in your own logic before you allow a user in your application, check if the user setting that grants permission is enabled. If it is not, show an error to the user. If it is, let the user pass.
- Invoicing process
We have noticed that for various partner integrations invoicing processes could be complex. It can involve Excel sheets being exchanged and discussions with clients about user counts. Having one list which is real time available for all parties involved, can make these invoicing processes run much smoother.

The settings are always available for OTYS and the partner (to retrieve or to update). It is also possible to make these settings available for clients (so that for example Key-users of the clients are able to grant rights for the individual users).

1.4 About this document

This document describes how you can use the OTYS Go! Partner settings to share a mutual list of settings. It is divided into the following three chapters:

1. General
In this chapter we will provide you some generic information about OTYS, the OTYS Go! Partner Framework and the OTYS Go! Partner settings.
2. Activation & configuration
In this chapter we will explain how the OTYS Go! Partner settings can be activated and configured.
3. Technical implementation
In this chapter we will explain how you can retrieve and update OTYS Go! Partner settings, so you can use them within your integration and/or invoicing process.

If you have feedback about this document, we would love to hear it from us. Please send us an email at partners@otys.com and provide us your feedback.

2. Activation & configuration

In this chapter we will explain how the OTYS Go! Partner settings can be activated and configured. Please note that after you have completed this chapter you will be able to start with the technical implementation of these partner settings. In the next chapter we will explain how you are able to interact with these partner settings using our web services.

2.1 Activation by OTYS for initial client(s)

Since Partner settings are client & user specific, you will need to have a way to define which OTYS client & user is interacting with your partner solution. For this we have created OTYS Go! Partner SSO. Although it is technically not fully necessary to use this (you could manually manage a list of OTYS clients & users on your side), it would be highly illogical not to use OTYS Go! Partner SSO while working with Partner settings. If you have not implemented OTYS Go! Partner SSO before, please check our manual about that functionality for more details.

2.1.1 Register as a partner

If you have not been using any of our functionalities 'OTYS Go! Partner SSO', 'OTYS Go! Partner widgets' or 'OTYS Go! Partner custom actions' before, we will first need to activate you as an OTYS Go! Partner. For this, we will need the following information from you as a partner:

- Partner name
The name your company should show in our user interface. Probably not your 'Official name', but the name people will recognize your company with.
- Partner email address
The generic email address to which we can send (technical) emails, in case we want to contact you. Don't worry... we are not going to SPAM your mailbox with all kinds of emails about new OTYS bells & whistles. This email is really used for technical matters.
- Partner description
It would be nice to have a small description of what your company / solution does. We prefer to have some specific information of what your product actually does (for example 'We automatically send LinkedIn requests to selected candidates, based upon configurable templates'), instead of having a nice (yet less clear) marketing text like 'We connect people to make the world a better place'.
- Endpoint URL
A generic endpoint URL which will be handling our SSO requests. If you do not intend to use the authentication using OTYS Go! Partner SSO just yet, It is fine to skip this field for now.
- Logo
Your company logo, preferably both in SVG- & PNG-format. Although we prefer to receive the SVG & PNG, please don't convert your JPG to a PNG (we can do that as well) or delay development because you are not able to find your SVG logo (we can always add better versions before actual 'go live').
- OTYS client(s) for initial activation
OTYS Partner SSO can be enabled for specific (mutual) clients or for all OTYS clients (only if we are sure this is of added value). During the development phase you will probably only enable it for very specific clients (for example your own OTYS testing client and maybe for an actual client you want to include in the development process). Please let us know for which

OTYS clients the OTYS Go! Partner SSO integration should initially be activated. Of course we will be able to add clients at a later stage upon your request.

- IP addresses for whitelisting

If you have specific public IP addresses which you will be using to communicate to the OTYS servers to, we would love to receive them. We can make sure partner requests can only be done through these IP addresses. Don't worry about forgetting some IP addresses. If for example one of your developers is testing something locally and that IP address is blocked, we can add that IP address very easily later. If you do not provide any IP addresses, we will not enable the whitelist and communication can go through all IP addresses.

Please send the information mentioned above to partners@otys.com. In return we will provide you with an OTYS Go! Partner API key, which can be used when retrieving or updating OTYS Go! Partner settings (more about that in the next chapter).

We are only able to provide this OTYS Go! Partner API key once, so please make sure it is stored in a safe place. If you at some time lost it, we are able to generate a new key, however this will cause your old key not to work anymore.

2.1.2 Creating a partner setting

New partner settings will need to be registered on our side. For this, we will need the following information about your (intended) widget:

- Setting name

The name of the partner setting as it should show in our user interface. So a clear naming based upon which users understand the 'purpose' of your widget. So if your solution has different types of users, for example 'Partner name - User type'.

- Setting description

An additional description we can show for the setting, to 'explain' to users (either end users or OTYS employees) what this setting exactly does in your application.

- Setting use type

The entity to which the setting should be connected, where you can choose from:

- Client setting

A setting to define something about the client/OTYS environment. If you for example offer various types of packages to our mutual clients (let's say a 'Basic'- and a 'Pro'-version), you can use a client setting to define which package applies to the client.

- User settings

A setting to define something about a specific user in the clients OTYS environment. If you for example want to limit usage to specific users, you can use a user setting to define if the user should have access (or not) to your integration.

- Website settings

To each OTYS client one or multiple websites can be connected. In some cases you want to define something on a website level. If you for example offer a service that shows something on the clients website in a specific color, you can use a website setting to define that color (so it can be different per website of the client).

- Client-user setting

A setting where you can define a default value on a client level and an exception on a user level. If you do set it on a client level and do not set it on a user level, retrieving the setting on a user level will give you the clients (default) value.

- Client-website setting
A setting where you can define a default value on a client level and an exception on a website level. If you do set it on a client level and do not set it on a website level, retrieving the setting on a website level will give you the clients (default) value.
- Setting data type
The data type of the setting (what can be filled in or chosen), where you can choose from:
 - Text (string)
Can be filled with a string. This can be a very simple string (for example 'basic' for basic package or 'pro' for pro package) or a very complicated string (for example a JSON where you store all kinds of preferences in a serialized way).
 - Number (int)
Can be filled with a whole number (for example to define the maximum number of actions a client or user can take in a specific period).
 - Yes / no (boolean)
Can be either true or false. Can be used to for example enable or disable your integrations or specific elements of your integration.
- Default value
The default value of the setting if it is not set for a specific client/user/website. If you for example have a setting that defines the number of credits a client/user has on a monthly basis, you can define that the default value is '0' (so that a client/user will not have credits, unless otherwise specified) or set it to '100' (so that every client/user will have 100 credits, unless otherwise specified).
- Access level
Which parties should be able to change this setting, where you can choose from:
 - OTYS & partner
Then it is only you and us who will be able to see/change the setting. This is for example used for settings that enable the integration for a specific client.
 - OTYS, partner & Key-users
In this case Key-users of the client (users with permissions to change the configuration of the client) are also able to see/change the setting. This is for example used for settings that enable the integration for a specific user.
 - OTYS, partners & all users
In this case all users of the client are also able to see/change the setting. This is for example used for settings that change the preferences of a specific user.

Please send the information mentioned above to partners@otys.com. We will confirm to you once we have added the setting(s) and let you know the 'setting code' and the 'setting number' of the settings we have created for you.

If it is not immediately clear to you on what setting(s) should be used for your integration, we are more than happy to discuss and share our thoughts. However, it is helpful if you have read the information above and have already given it some thought; so we can have an effective discussion.

Of course it is no problem to 'combine the requests' mentioned above. So if you are not registered as a partner yet and want us to create three settings, feel free to send us one email with your partner information and information from all settings (for the 'insiders': see it as a MultiService.execute :).

2.2 Configuration in OTYS client

Once OTYS Go! Partner settings have been activated by us and you have received our confirmation, the mentioned clients are able to see & change them IF you have indicated the setting should be available for (Key-)users.

To see & change client settings, take the following steps:

1. Open OTYS Go!
2. Login to an OTYS account of a client which is linked to you as a partner
3. Click on your user icon on top right and choose 'Client settings'
4. At 'Keyword' on top right fill in (part) of the setting name (for example your company name) or at 'Search setting number...' fill in the setting number followed by enter
5. Open the setting in the list on the left
6. Change the setting to the desired value and hit 'Save'

To see & change user settings, take the following steps:

1. Open OTYS Go!
2. Login to an OTYS account of a client which is linked to you as a partner
3. Click on your user icon on top right and choose 'User settings'
4. At 'Keyword' on top right fill in (part) of the setting name (for example your company name)
 1. or at 'Search setting number...' fill in the setting number followed by enter
5. At 'Target user' select the user for which you want to see & change the setting
6. Open the setting in the list on the left
7. Change the setting to the desired value and hit 'Save'

To see & change website settings, take the following steps:

1. Open OTYS Go!
2. Login to an OTYS account of a client which is linked to you as a partner
3. Click on your user icon on top right and choose 'Client settings'
4. At 'Keyword' on top right fill in (part) of the setting name (for example your company name) or at 'Search setting number...' fill in the setting number followed by enter
5. At 'Use type' deselect 'Client' and select 'Website'
6. At 'Target website' select the website for which you want to see & change the setting
7. Open the setting in the list on the left
8. Change the setting to the desired value and hit 'Save'

If you are not familiar with the generic working of settings, please check the 'Manual OTYS Go! Settings' (see <https://www.otys.com/go-manuals>) for more information about how you can access these settings.

2.3 Activation by OTYS for additional clients

After you have created a nicely working setting(s) based upon your OTYS testing client, we can enable the setting(s) for additional OTYS clients upon your request. It is also possible to globally enable your setting(s) for all OTYS clients, however this will of course need to be sure your integration will work and will be of added value for all our clients (worldwide). In 'normal cases' we will activate your setting(s) for (a group of) specific clients.

3. Technical implementation

Once the activation has been done (see paragraph 2.1 of the previous chapter), you can start working on the technical implementation. In this chapter we will explain how you can retrieve and update OTYS Go! Partner settings, so you can use them within your integration and/or invoicing process.

3.1 Process outline

Before starting with actual implementation, it is wise to give some thought to the 'process outline'. This very much depends upon your solution and the partner setting(s) created, but let's say you are a multi-poster and we have created three settings on your behalf:

- Multiposting company - Enable for client
A yes/no (boolean) client setting (by default false) only available for you & us to define if the integration could be used by the client.
- Multiposting company - Package type
A test (string) client setting (by default 'basic') only available for you & us to define the package type of the client ('basic' or 'pro').
- Multiposting company - Enable for user
A yes/no (boolean) user setting (by default true) available for you, us & Key-users of the client to define if the integration could be used by the user.

In your application you then probably want to implement the following logic:

1. First check if the 'Enable for client'-setting is enabled for the client. If it is disabled, do not allow the user to your application and show a message to contact you as a partner to enable the integration. If it is enabled, continue to the next step.
2. Then check if the 'Enable for user'-setting is enabled for the user. If it is disabled, do not allow the user to your application and show a message to contact the Key-user. If it is enabled, continue to the next step.
3. Finally check the 'Package type'-setting. If it is set to 'basic' show the user the basic capabilities of your solution, if it is set to 'pro' show the user the pro capabilities of your solution and if it is set differently show a message to contact you as a partner to enable the integration.

Of course you can also choose to sync the OTYS settings with internal settings on your end, so that the above mentioned checks can be done based upon settings of your own application.

In your invoicing process you probably want to create a monthly process that retrieves the settings for all clients and creates a report (or even better: actual invoice items) for your finance department based upon the commercial agreements.

3.2 Retrieving a specific partner setting

To retrieve the value of a specific partner setting, you can send the following POST-request to our OWS endpoint (<https://ows.otys.nl/jservice.php>):

```
{
  "jsonrpc": "2.0",
  "method": "Otys.Services.SsoService.getSetting",
  "params": [
    "[partnerapikey]",
    "[partnersettingcode]",
    [clientid],
    [userid],
    [websiteid]
  ],
  "id": 1
}
```

This request consists of the following parameters:

- **[partnerapikey]:** This is the Partner API key that you also use to authenticate a user via OTYS Partner SSO.
- **[partnersettingcode]:** This is the code of the setting you want to request which we have sent to you after we have created the partner setting for you.
- **[clientid]:** This is the client from which you want to request the value of the setting. It is not a mandatory parameter, but in practice you will always use it.
- **[userid]:** This is the user ID for which you want to request the value of the setting. It is not a mandatory parameter and you will only use it when requesting a user setting.
- **[websiteid]:** This is the website ID for which you want to request the value of the setting (for example '1' for the first website). It is not a mandatory parameter and you will only use it when requesting a website setting.

The previous request will normally give you the following response:

```
{
  "result": {
    "uid": "[partnersettinguid]",
    "code": "[partnersettingcode]",
    "value_default": "[defaultvalue]",
    "value_partner": "[partnervalue]",
    "value_client": "[clientvalue]",
    "value_user": "[uservalue]",
    "value_website": "[websitevalue]",
    "value": "[value]"
  },
  "id": 1
}
```

This response consists of the following parameters:

- **[partnersettinguid]**: This is the numeric UID of the setting you requested.
- **[partnersettingcode]**: This is the code of the setting you have requested.
- **[defaultvalue]**: This is the default value of the setting.
- **[partnervalue]**: It is possible that a partner setting is used by several partners. In this case, in addition to the default value, we can also specify a default value per partner.
- **[clientvalue]**: This is the value set at the client level for the requested client.
- **[uservalue]**: This is the value set at the user level for the requested user.
- **[websitevalue]**: This is the value set at the website level for the requested website.
- **[value]**: This is the final value of the setting.

It is therefore quite an 'extensive response', while in the end it is only about '[value]' (and is therefore simpler in practice than it seems at first glance). However, because you also get the other values, you can better determine - if necessary - the reason why a setting has a specific value.

3.3 Updating a specific partner setting

To change the value of a specific partner setting, you can send the following POST-request to our OWS endpoint (<https://ows.otys.nl/jservice.php>):

```
{
  "jsonrpc": "2.0",
  "method": "Otys.Services.SsoService.setSetting",
  "params": [
    "[partnerapikey]",
    "[partnersettingcode]",
    "[value]",
    "[clientid]",
    "[userid]",
    "[websiteid]"
  ],
  "id": 1
}
```

This request consists of the following parameters:

- **[partnerapikey]**: This is again the Partner API key.
- **[partnersettingcode]**: This is again the code of the setting you want to change.
- **[newvalue]**: This is the value in which the setting should be changed.
- **[clientid]**: This is the client whose setting you want to change. It is not a mandatory parameter, but in practice you will always use it.
- **[userid]**: This is the user ID whose setting you want to change. It is not a mandatory parameter and you will only use it when changing the value of a user setting.
- **[websiteid]**: This is the website ID whose setting you want to change (for example '1' for the first website). It is not a mandatory parameter and you will only use it when changing the value of a website setting.

The previous request will normally give you the following response:

```
{
  "result": {
    "created": true,
    "data": {
      "uid": "[partnersettinguid]",
      "code": "[partnersettingcode]",
      "value_default": "[defaultvalue]",
      "value_partner": "[partnervalue]",
      "value_client": "[clientvalue]",
      "value_user": "[uservalue]",
      "value_website": "[websitevalue]",
      "value": "[value]"
    }
  },
  "id": 1
}
```

This response consists of the following parameters:

- **[newvalue]**: This is the new value in which the setting has been changed.
- **[partnersettinguid]**: This is the numeric UID of the setting you have changed.
- **[partnersettingcode]**: This is the code of the setting you have changed.
- **[defaultvalue]**: This is the default value of the setting.
- **[partnervalue]**: It is possible that a partner setting is used by several partners. In this case, in addition to the default value, we can also specify a default value per partner.
- **[clientvalue]**: This is the value set at the client level for the requested client.
- **[uservalue]**: This is the value set at the user level for the requested user.
- **[websitevalue]**: This is the value set at the user level for the requested website.
- **[value]**: This is the final value of the setting.

So again a fairly 'extensive response', while it is only a confirmation that the change has been successfully implemented.