

Phase 1: User Interface Upgrade

Oleeo Update

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Introduction

Oleeo have recently enhanced the user interface for a more intuitive, and user-friendly interface. Notable enhancements are as follows:

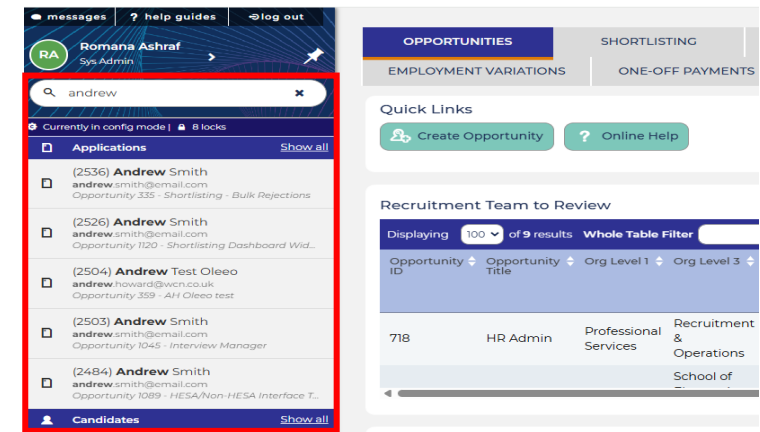
- Search Improvements - An enhanced search function
- Colour Theme - A revised colour theme
- Account Settings - Updated user account/profile settings

What's changed

Search Improvements

The search bar has moved to the left-hand menu.

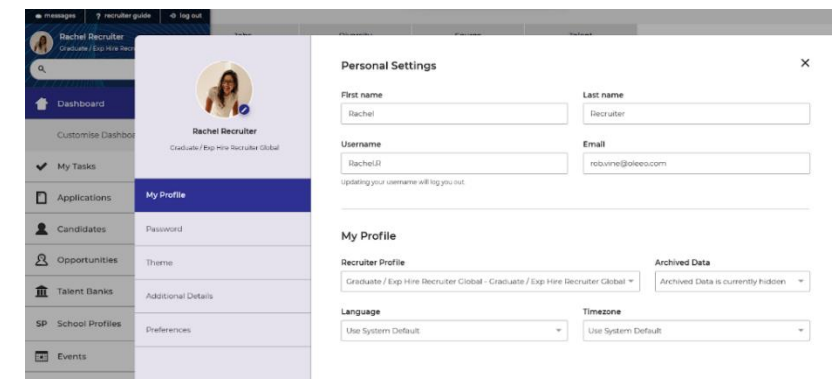
The search functionality has been enhanced to deliver more comprehensive results; when you type into the search box within the left-hand menu, the system will retrieve results from all areas of the system that you have access to (opportunities, applications or candidates). However, if you want to search within a specific section, you can still do that.



Account Settings Improvements

The Profile/Account Settings are now accessible via a pop-up window, allowing you to modify your preferences without leaving your current screen and minimising the risk of losing your work. Preferences include accessibility and pinned menu settings.

To access these settings, simply click on your name or profile picture located in the left-hand menu.



Colour Scheme/Unified Styling

Oleeo is committed to enhancing the user interface and design of our system, and will be implementing updates to the visual style, including adjustments to the colour scheme. These modifications are purely aesthetic and will not affect system functionality, but they will contribute to a more cohesive and polished user experience.

All Applications

BEFORE

ViewAdd to SelectionAdd To CampaignStatusCommunicationBulk Actions

Displaying25of 2481 results0 SelectedFilter resultsFilter resultsGender layout

APPLICATION ID	FIRST NAME	LAST NAME	DIVERSITY - RACE / ETHNICITY
18	Raja	Sooriyakumaran	Asian/Asian British - Pakistani
20	Raga	Sooriyakumaran	Prefer not to disclose
22	Jonas	Pate	White - Gypsy or Irish Traveller
25	Victor	Mcfarland	
26	Ben	Wyatt	

All Applications

AFTER

ViewAdd to SelectionAdd To CampaignStatus

Displaying25of 79 results0 SelectedFilter resultsFilter resultsCH FLP Dashboard

Internal Job Info	Candidate CRIS ID	Candidate Application ID	Last Name	First Name	Gender	Application Status (Layout)	Internal Job Info Position (CH only)	Vacancy/Event (List)	Vacancy Title (Text)	Internal Job Info Location (CH only)	Internal Job Info Recruiter Lead	CH - Start Date	Employee ID	Simple Offer Status Flag	Job Info - CH - OE Code - Secondary	Current Unl. Degree	Current Master Degree After Graduation
	1	1	Daniels	Buffy		Application started, not submitted		1	Data Analyst								
	3	3	Collier	Winter		Video Interview - Invited		6	Sales Engineer								
	8	8	bertage	bert		Application started, not submitted		7	Test Job 2								

Next steps: Comprehensive instructions on how to effectively utilise the enhanced functionality is provided further in this document.

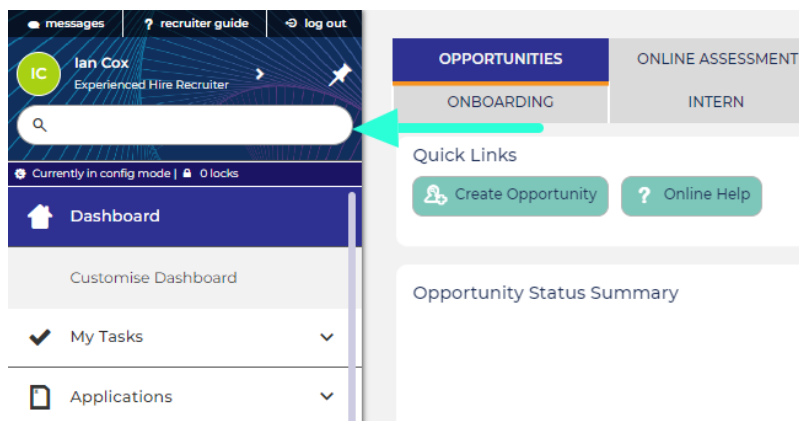
Searching the System

At the top of the left-hand menu, you'll find the search box, which offers a quick way to find applications, candidates, opportunities, saved searches, saved selections, menu items and Report Hub reports. More “how to” guides can be found below.

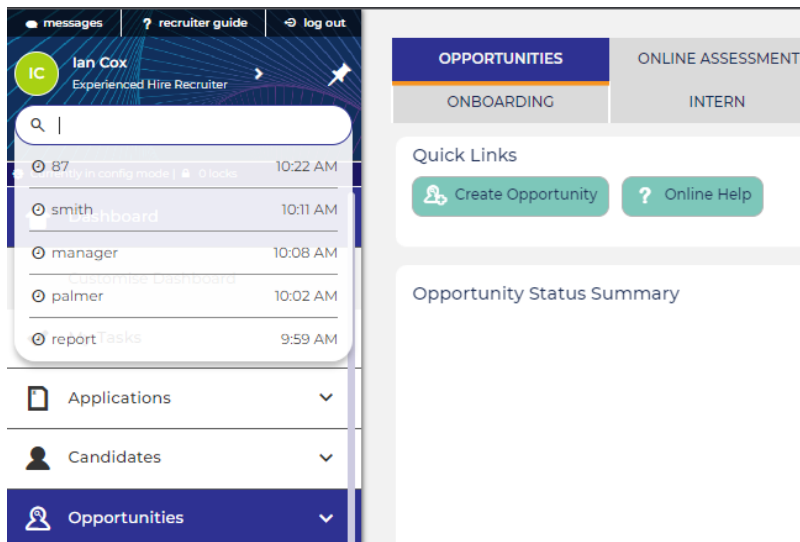
- [USING THE SEARCH BOX](#)
- [SEARCHING FOR AN APPLICATION](#)
- [SEARCHING FOR A CANDIDATE](#)
- [SEARCHING FOR AN OPPORTUNITY \(VACANCY\) OR EVENT](#)
- [FULL TEXT SEARCH](#)
- [LOADING A SAVED SEARCH](#)
- [LOADING A SELECTION](#)
- [RECENT ENTITIES](#)

USING THE SEARCH BOX

- **Search box is located at the top of the left-hand menu:**
 - When you hover your cursor over the left-hand menu it will automatically expand.
 - The search box is positioned at the top of the left-hand menu under your name.



- **Click in the search box to view recent searches:**
 - When you click inside the search box it shows your last 5 searches and the time they were run.
 - Click on a previous search to re-run it.

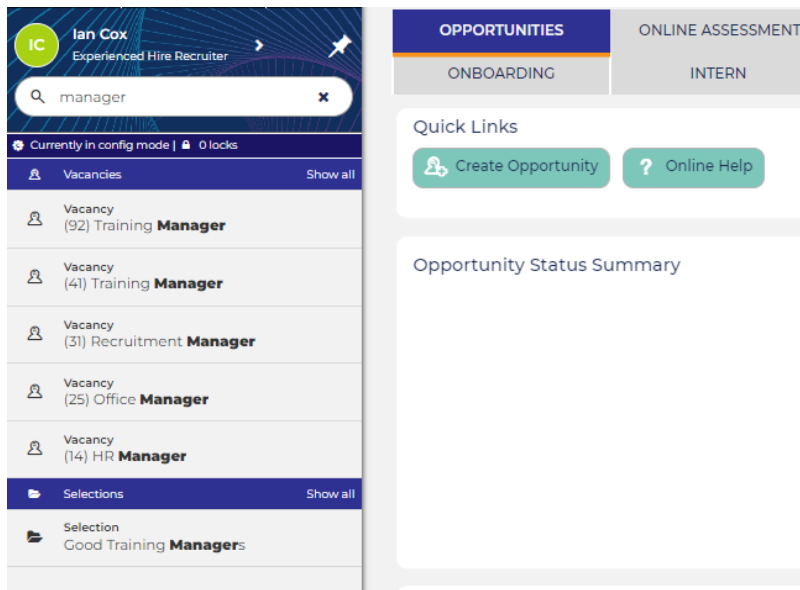


➤ **Perform a new search by entering a name, email, title or ID:**

- When conducting a search, you can enter a name, email, title or ID.
- If your search is only a number, the quick search will look for exact matches in IDs. (e.g. Application IDs, Vacancy IDs, etc.).
 - **Wildcard Search:** Use a tilde (~) before the search term (e.g. “~87”) this will return ID results like “87”, “187”, “2287” as well as text entries such as opportunity titles and applicants’ email addresses.
- Titles (e.g. opportunity title, saved search title) perform contains searches. So, searching "Manager" will return results like "Project Manager".
- Candidate name searches default to begins with searches.
- The search begins as soon as you start typing.
- The system will search applications, candidates, opportunities, events, talent banks, report hub reports, saved searches, saved selections and menu items.

➤ **Quick results are displayed in the left-hand menu:**

- Search results will appear in the left-hand menu, replacing the menu items.
- Results are organised by type (e.g. Menu Items, Applications, Candidates), with a maximum of 5 matching items displayed per type.
- The ID number is displayed in brackets.
- Items are sorted by descending ID number, so the largest (most recent) results are shown first.



- **Navigating and viewing:**
 - Click on an item to navigate to the corresponding record.
 - You can right-click on an item and choose 'Open in new tab'.
 - Click 'Show all' next to the type heading to view all matching items for a specific type.
- **Cancel a search by clicking 'x':**
 - To cancel the search and return to the left-hand menu options, click the 'x' in the search box.

SEARCHING FOR AN APPLICATION

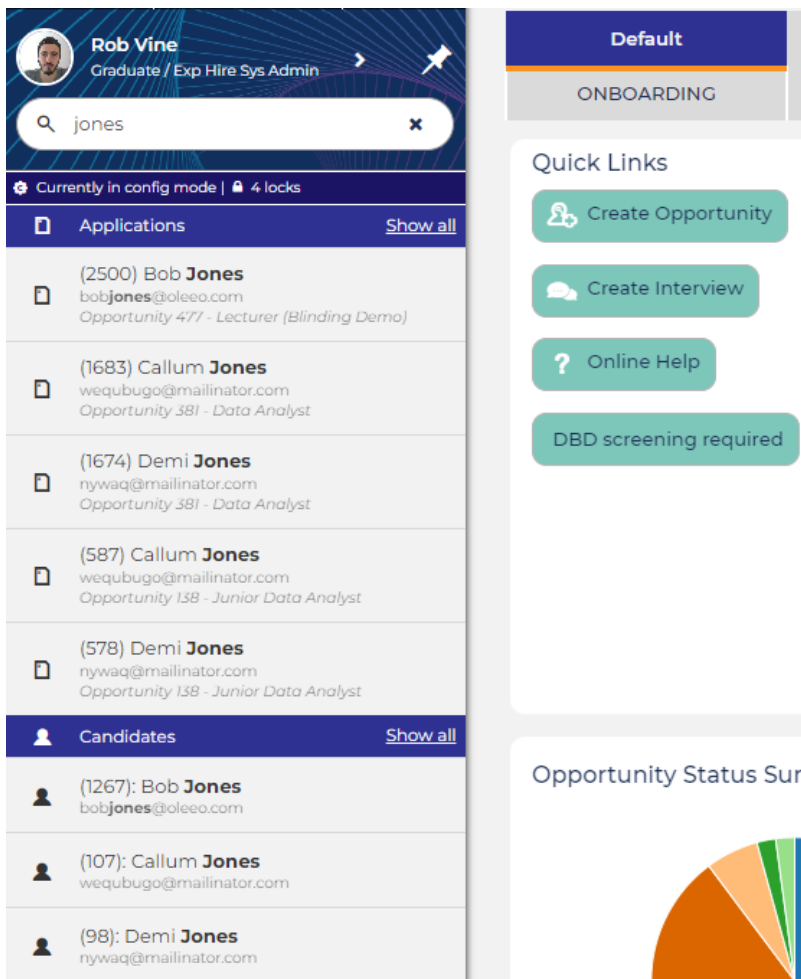
You can quickly find an application to an opportunity using the search box.

- **Search using first name, last name, email address or application ID**
 - When looking for a candidate's application, you can search using their first name, last name, full name, email address or application ID.
 - If the application you are searching for is anonymised, you will only be able to search using their application ID.
- **Application searches default to 'begins with'**
- **Examples of application name searches:**
 - To find applications by a candidate named "Steve Burnett," you can:
 - Enter the first name (e.g. "Steve").

- Enter the last name (e.g. "Burnett").
- Enter the full name (e.g. "Steve Burnett").
- Enter the first name and partial last name (e.g. "Steve B").
- Enter the full last name and partial first name separated by a comma (e.g. "Burnett, Ste").

- **Viewing search results:**

- Search results will display in the left-hand menu under the 'Applications' heading.
- Up to 5 matching applications will be shown.
- The candidate's email address and associated opportunity are displayed below their name.
- Applications are sorted by descending ID number, displaying the most recent application first.
- Click an application to load their 'Application Summary' record.
- To view the full list of applications in the main body of the page, click 'Show all'.



Rob Vine
Graduate / Exp Hire Sys Admin

Search: jones

Currently in config mode | 4 locks

Applications [Show all](#)

(2500) Bob Jones	bobjones@oleeo.com	Opportunity 477 - Lecturer (Blinding Demo)
(1683) Callum Jones	wequbugo@mailinator.com	Opportunity 381 - Data Analyst
(1674) Demi Jones	nywaq@mailinator.com	Opportunity 381 - Data Analyst
(587) Callum Jones	wequbugo@mailinator.com	Opportunity 138 - Junior Data Analyst
(578) Demi Jones	nywaq@mailinator.com	Opportunity 138 - Junior Data Analyst

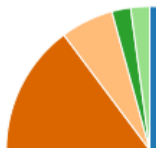
Candidates [Show all](#)

(1267): Bob Jones	bobjones@oleeo.com
(107): Callum Jones	wequbugo@mailinator.com
(98): Demi Jones	nywaq@mailinator.com

Quick Links

- Create Opportunity
- Create Interview
- Online Help
- DBD screening required

Opportunity Status Sun



Navigate directly to an application using the "a: [id number]" prefix

- When you type in an ID number or title into the search box, the system then displays the results in the left-hand menu, and you can click on an item to load it.
- If you know the application's ID number, you can navigate straight to the application by using the prefix "a: [id number]" and then hitting enter.
- For example, if the application's ID number is "119" enter "a: 119" into the search box and hit enter.

SEARCHING FOR A CANDIDATE

If you have access to the 'Candidates' module, you can also find candidate records within the search results. You can navigate to a candidate's record and view all their applications.

- **Candidate search works the same as application search:**
 - The candidate search function operates the same way as the application search function.
 - Search results for candidates are listed under the 'Candidates' heading.
- **Candidate's record will show even if they have not made an application:**
 - If a candidate has created an account but has not yet started an application, they will still show in the candidates' results.

SEARCHING FOR AN OPPORTUNITY (VACANCY)

You can quickly find an opportunity using the search box.

- **Search using opportunity title or ID:**
 - When searching for a job opportunity (vacancy), you can use its title or opportunity ID number.
- **Opportunity title searches default to a 'contains' search:**
 - For instance, searching 'Manager' will yield results like 'Project Manager'.
- **Viewing search results:**
 - Search results will appear in the left-hand menu under the 'Opportunities' (Vacancy) or 'Events' heading.
 - Up to 5 matching opportunities will be displayed.
 - Opportunities are sorted by descending ID number, showing the most recent opportunity first.
 - Click on an opportunity to navigate to its record.

- To view the complete list of opportunities that match your search criteria, click 'Show all'. The opportunities will be shown in the main page body.

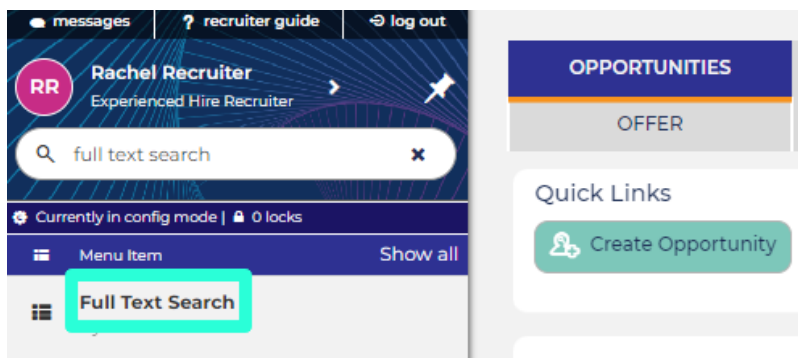
Navigate directly to an opportunity using the "v: [id number]" prefix

- When you type in an ID number or title into the search box, the system then displays the results in the left-hand menu, and you can click on an item to load it.
- If you know the opportunity's ID number, you can navigate straight to the opportunity by using the prefix "v: [id number]" and then hitting enter.
- For example, if the opportunity's ID number is "873" enter "v: 873" into the search box and hit enter.

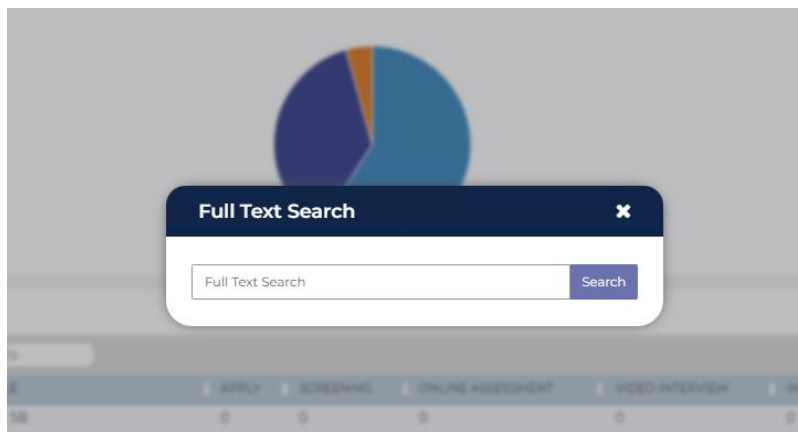
FULL TEXT SEARCH

You can run a full text search that will search any free text field on a candidate's applications or attachments such as CV/Resume or cover letter. This is useful if you want to search for specific skills.

- Type **Full Text Search** into the search box.

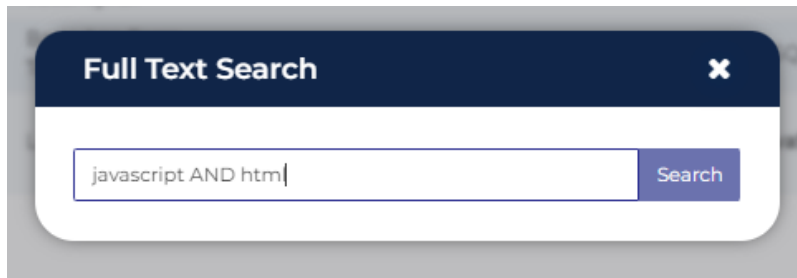


- Click on the resulting link to bring up the full text search box.



- Put your search criteria in the search box and click **Search**.

- You can use Boolean operators such as **AND**, **OR** & **NOT** to help filter your results.

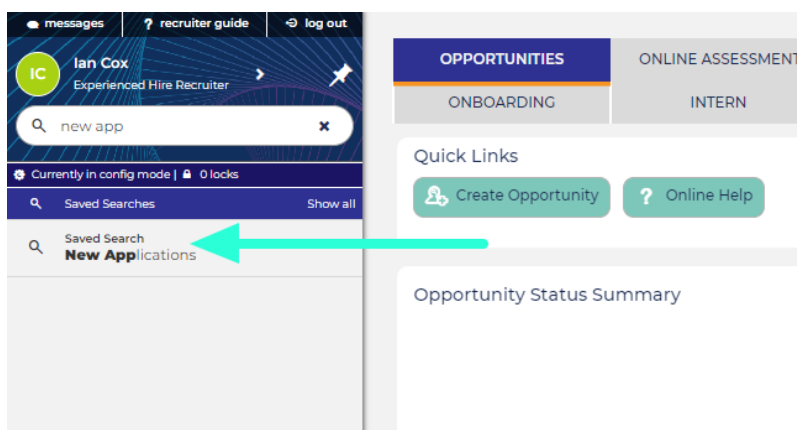


LOADING A SAVED SEARCH

You can create advanced searches to find specific groups of opportunities or applications and save them for future use, designating them as 'Private' or 'Global.'

You can use the search box to load any of the Saved Searches you have access to.

- Locate Saved Searches using their title:**
 - Locating a 'Saved Search' using the search box defaults to a 'contains' search.
 - For example, entering the text "opportunities" will find results with the title "All Opportunities Applications".
 - Search results are presented under the 'Saved Searches' heading in the left-hand menu.
 - Up to 5 matching Saved Searches will be displayed.



- Loading and editing Saved Searches:**
 - Click on a Saved Search to load the results.

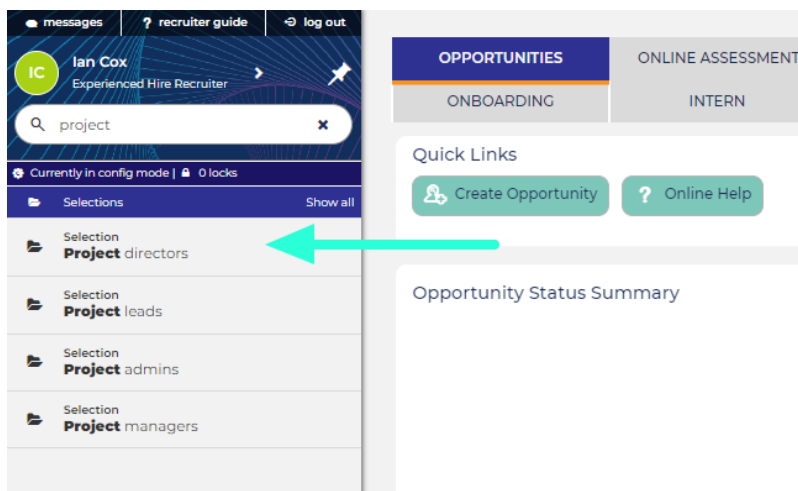
- To see the complete list of Saved Searches that match your search criteria, click 'Show All'. These Saved Searches will appear in the main page body.
- From this page, you can also edit the properties of the Saved Search to suit your needs.

LOADING A SELECTION

You can create personal folders to keep track of your applications or opportunities. You then manually add applications or opportunities to the folders. These folders are called "Selections". Like Saved Searches, they can be set as 'Private' or 'Public'.

You can use the search box to load any of the Selections you have access to. The process of locating and loading a Selection works the same as loading a Saved Search.

- **Locate a Selection using its title:**
 - Locating a 'Selection' using the search box defaults to a 'contains' search.
 - Search results are presented under the 'Selections' heading in the left-hand menu.
 - Up to 5 matching Selections will be displayed.
 - If there are more than 5 matching selections, the 5 most recently created will be shown.



- **Loading a Selection:**
 - Click on a Selection to load the applications or opportunities that have been added to the Selection.
 - To see the complete list of Selections that match your search criteria, click 'Show All'. These Selections will appear in the main page body.

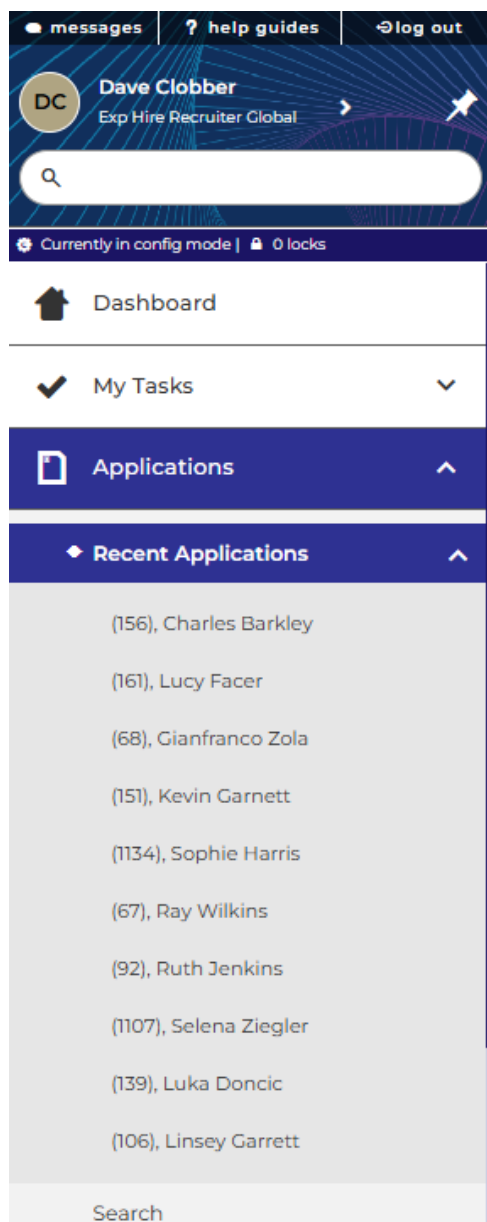
RECENTLY VIEWED RECORDS

Under the **Applications, Candidates, Vacancies, and Events** menus, there is a **"Recent"** option. This provides a quick-access list of the last 10 records you visited within that category.

This feature is especially useful for users who find the **"Recents"** flyout window difficult to navigate.

How to use:

1. Click on the **"Recent"** menu item under **Applications, Candidates, Vacancies, or Events**.
2. A list of the last 10 visited entities will be displayed.
3. Click on the entity you want to revisit.



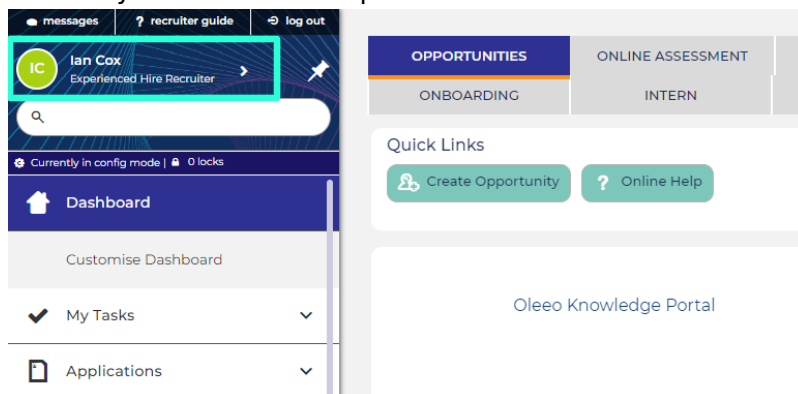
Personalising your Account Settings

You can customise your account settings to fit your style.

- [ACCESSING YOUR ACCOUNT SETTINGS](#)
- [ADDING A PROFILE PICTURE](#)
- [MY PROFILE TAB - CHANGING YOUR PROFILE SETTINGS](#)
- [CHANGING YOUR THEME TO HIGH CONTRAST](#)
- [PREFERENCES TAB](#)
 - [Changing your Accessibility settings](#)
 - [Changing the System Behaviours](#)

ACCESSING YOUR ACCOUNT SETTINGS

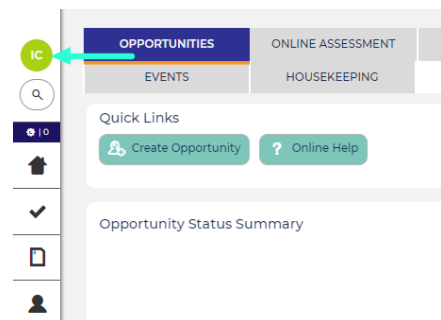
1. Click on your name at the top of the left-hand menu.



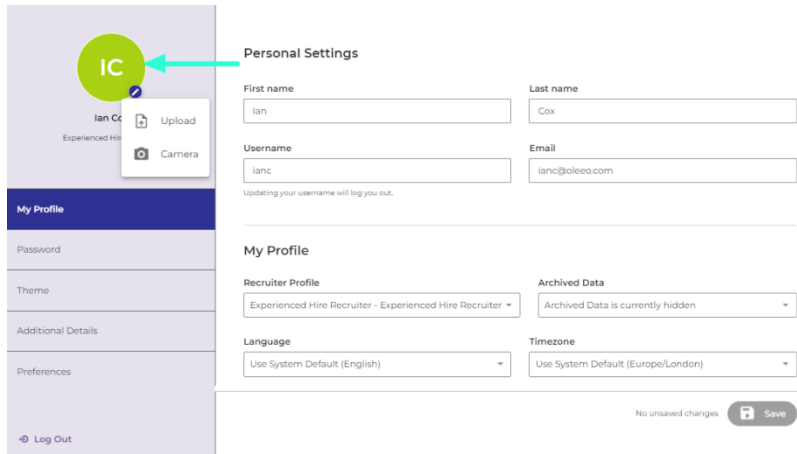
2. A pop-up modal will open, and the settings will be organised under the 'My Profile', 'Password', 'Theme', 'Additional Details' and 'Preferences' tabs.
3. Once you have made a change, click the 'Save' button.

ADDING A PROFILE PICTURE

At the top of the left-hand menu, you'll find your profile icon, which at first displays your initials.



To add a profile picture, go to the account settings page, click your initials, and choose 'Upload' or 'Camera'.



MY PROFILE TAB

The 'My Profile' tab contains the 'Personal Settings' and 'My Profile' sections.

Changing your Profile settings

Under the 'My Profile' section, you can adjust the following options:

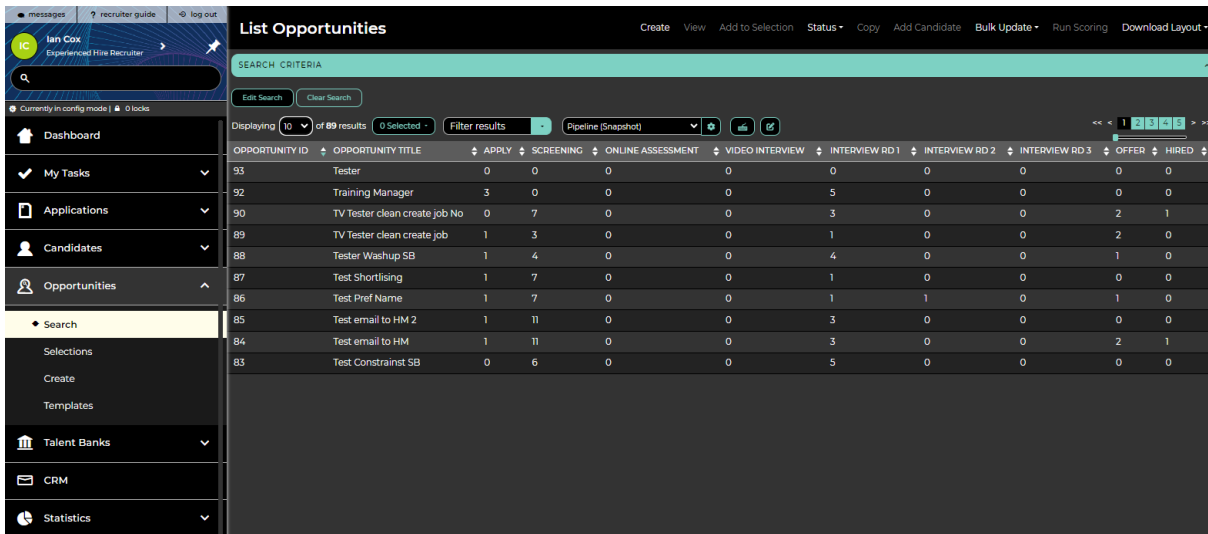
- **Recruiter Profile:**
 - Access all profiles available to you from this dropdown.
 - If you have multiple profiles (e.g., Recruiter and Hiring Manager), easily switch between them using this dropdown.
- **Language:**
 - Change the display language if your ATS supports multiple languages.
- **Timezone:**
 - Your system has a default timezone, but you can change your account to match your current location. This adjustment will affect how times are displayed to you in the system.

CHANGING YOUR THEME TO HIGH CONTRAST

To customise the visual appearance of your account, navigate to the **Theme** tab.

Here, you can switch between the default 'Radial Blue' theme and 'High Contrast'.

The high contrast palette has a simplified colour logic with consideration to colour-blindness, luminosity, and inversion.



OPPORTUNITY ID	OPPORTUNITY TITLE	APPLY	SCREENING	ONLINE ASSESSMENT	VIDEO INTERVIEW	INTERVIEW RD 1	INTERVIEW RD 2	INTERVIEW RD 3	OFFER	HIBED
93	Tester	0	0	0	0	0	0	0	0	0
92	Training Manager	3	0	0	0	5	0	0	0	0
90	TV Tester clean create job No	0	7	0	0	3	0	0	2	1
89	TV Tester clean create job	1	3	0	0	1	0	0	2	0
88	Tester Washup SB	1	4	0	0	4	0	0	1	0
87	Test Shortlisting	1	7	0	0	1	0	0	0	0
86	Test Pref Name	1	7	0	0	1	1	0	1	0
85	Test email to HM 2	1	11	0	0	3	0	0	0	0
84	Test email to HM	1	11	0	0	3	0	0	2	1
83	Test Constraint SB	0	6	0	0	5	0	0	0	0

Example of the system view in high contract theme.

PREFERENCES TAB

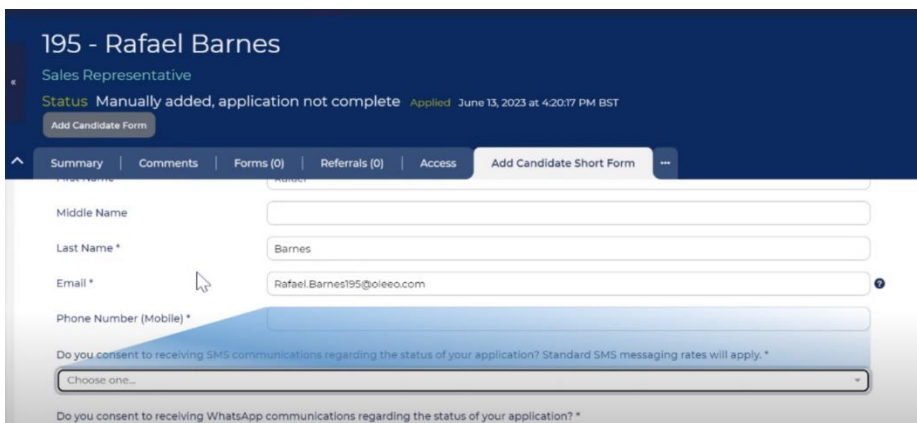
The 'Preferences' tab contains the 'Accessibility' and 'System Behaviours' sections.

Changing your Accessibility settings

Under the 'Accessibility' section, you can enable the following options:

- **Keyboard Focus:**
 - Provides a highlight or animation when navigating through forms or selected areas using the Tab key.
 - The animation highlights the field tabbed from and to.

When 'Keyboard Focus' is enabled, blue animation shows when you tab from one field to another.



195 - Rafael Barnes
Sales Representative
Status: Manually added, application not complete Applied: June 13, 2023 at 4:20:17 PM BST

Summary | Comments | Forms (0) | Referrals (0) | Access | Add Candidate Short Form

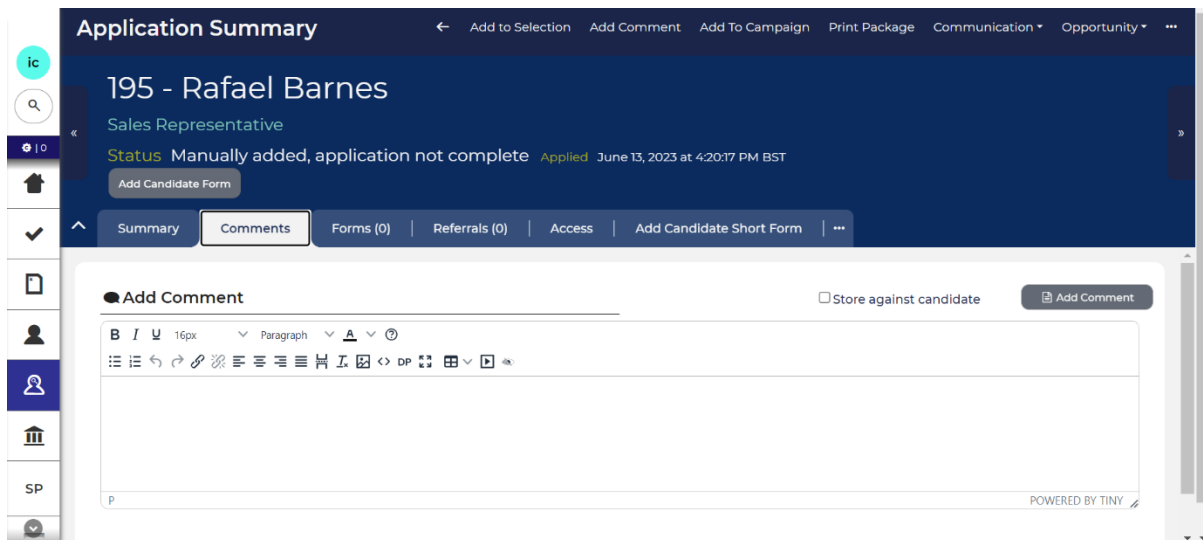
Middle Name
Last Name * Barnes
Email * Rafael.Barnes195@oleeo.com
Phone Number (Mobile) *

Do you consent to receiving SMS communications regarding the status of your application? Standard SMS messaging rates will apply. *
Choose one...

Do you consent to receiving WhatsApp communications regarding the status of your application? *

- **Tab Focus:**

- Applies an additional highlight to the selected tab when viewing areas of the system that use tabs.
- Examples of pages that use tabs are the Application Summary and opportunity pages.
- A box will be applied around the tab's label text to help discern it from unselected tabs.



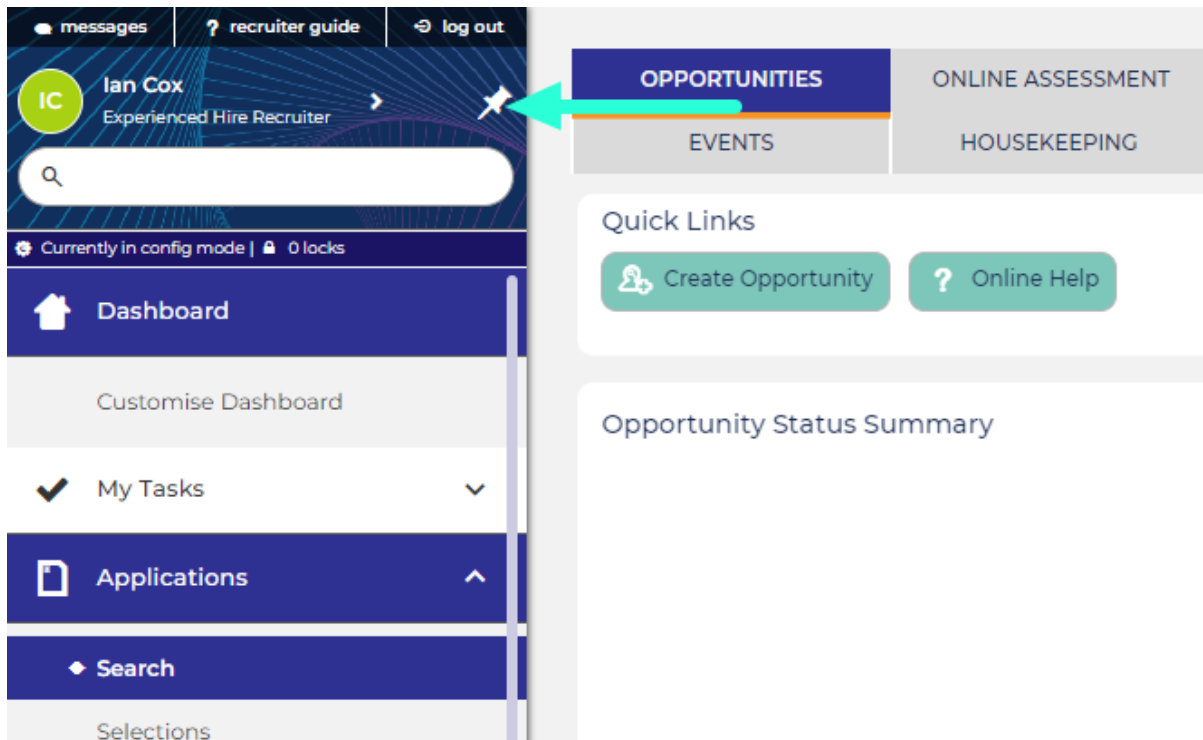
In this example where 'Tab Focus' is enabled, the 'Comments' tab is being viewed. An additional box highlights the tab's title.

Changing the System Behaviours

In the 'System Behaviours' section you can set the following options:

- **Menu Always Pinned:**

- This option ensures that the left-hand menu is always maximised for easy access.
- You can also change this setting by clicking the pin icon to the top-right of the left-hand menu.



You can also pin or unpin the left-hand menu by clicking the pin icon at the top of the menu.

- **Save data table column filters between sessions:**

- When you're viewing lists within the system, you have the option to 'Show Column Filters'.
- Enabling this behaviour setting ensures that the system will continue to show/hide column filters even if you exit the list and return to it later or switch to a different list.
- This streamlines your experience and saves time when working with lists.

Displaying 100 of 66 results 0 Selected Filter results Customised Layout								
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
APPLICATION ID	FIRST NAME	LAST NAME	EMAIL	OPPORTUNITY TITLE	APPLICATION STATUS	CV / RÉSUMÉ	SOURCE	
196	Spike	Farrell	Spike.Farrell196@oleeo.com	Sales Representative	Screened - rejected			
195	Rafael	Barnes	Rafael.Barnes195@oleeo.com	Sales Representative	Manually added, application not complete			
194	Lyndon	Elliott	Lyndon.Elliott194@oleeo.com	Sales Representative	Screened - rejected			
193	Alen	Tucker	Alen.Tucker193@oleeo.com	Sales Representative	Manually added, application not complete			

Example of column filters shown when viewing a list of applications.

- **Notification popup duration:**

- When you complete some actions on the system, a notification box pops up.

- This setting allows you to select how long notifications appear on the screen.
- **Date/time format:**
 - This setting empowers you to decide how dates are presented to you. You can select either the Month/Day/Year format or the Day/Month/Year format.
 - Additionally, this setting governs the format of dates when you export date fields from the system, ensuring consistency in your data handling.