



Release Notes

Build: 17.04.01

Colleague Software Ltd

Date Created: 19/04/17

Colleague 7 Release Notes - 17.04.01

1. Introduction

The document communicates the new features and changes in this release of Colleague 7.

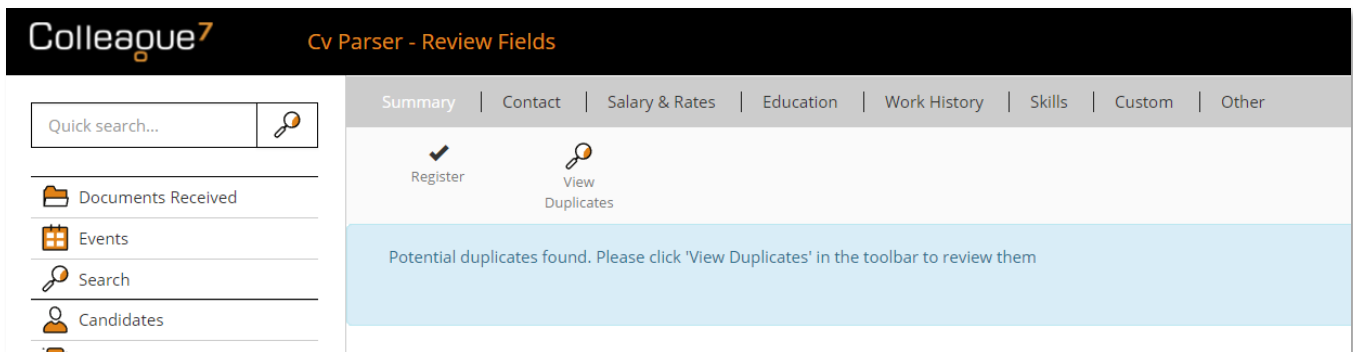
2. About This Release

Sprint Goal: Continue to enhance CV parsing functionality with the option to update existing records and implement the User Voice plugin for client suggestions.

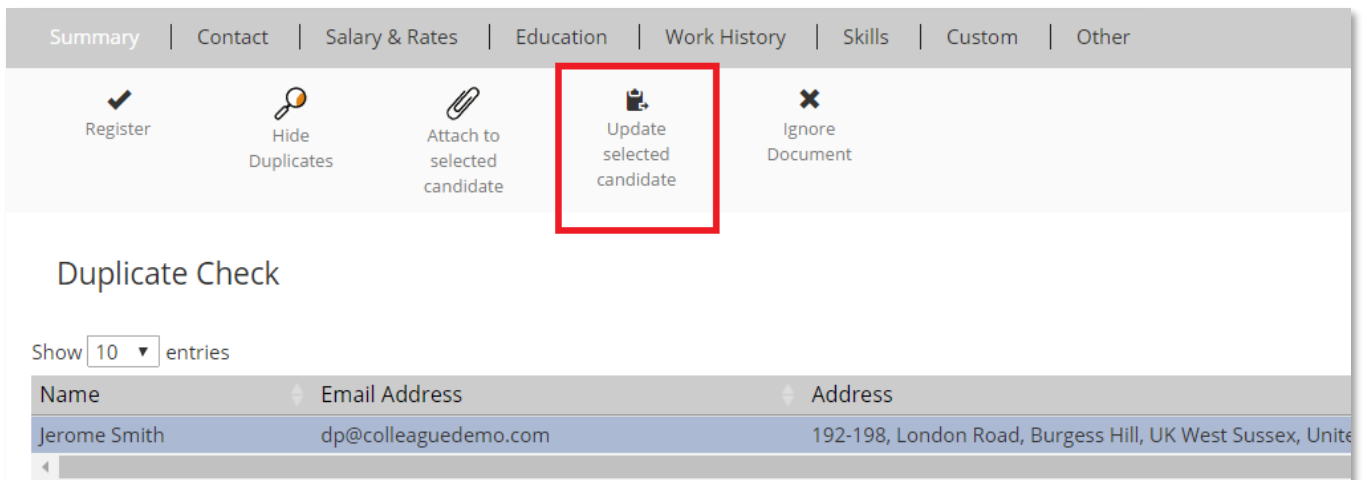
3. New Features

3.1 Parsing - Have An Option To Update An Existing Record

When parsing a document, we now have an option to update an existing record with newly parsed data. The workflow is as follows: When using the CV parser you will be notified of potential duplicates:



If you click on 'View Duplicates' and select a candidate you will be given the option to 'Update selected candidate':



Clicking on this feature will then launch a screen that allows you to select which fields to update based on the newly parsed data:

Colleague⁷

Update Existing Candidate - Jerome Smith (8798)

Quick search...

Documents Received

Events

Search

Candidates

Companies

Contacts

Requirements

Interviews

Offers

Placements

Recent Items

Favourites

Admin

Ideas + Feedback

Personal >

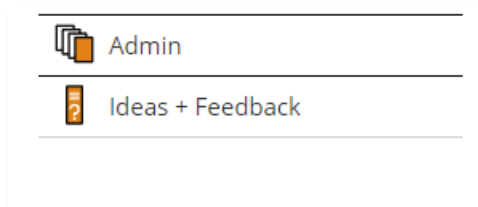
Update Existing Candidate - Jerome Smith

Field Name	Current Value	New Value	Update Record
Title	Mr	Mr	✓
Known As	Jerome	Jerome	✓
Email**	dp@colleaguedemo.com	dp@colleaguedemo.com	✓
Secondary Email**	dp2@colleaguedemo.com	dp2@colleaguedemo.com	✓
Gender	Male	Male	✓
Address Line 1	192-198	192-198	✓
Address Line 2	London Road	London Road	✓
Address Line 3			✓
City	Burgess Hill		✓
County	UK West Sussex	UK West Sussex	✓
Postcode	RH15 9RD		✓
Country	United Kingdom	United Kingdom	✓
Date Of Birth			✓
Nationality	American	American	✓
Telephone	01243629854	01243629854	✓
Mobile Number*	07980 000000	07980 000000	✓
Other Number			✓
Direct Number			✓

When ready click on the name to complete the process and open the record.

3.2 Customer User Voice Reporting

Colleague 7 now has an integration with UserVoice for logging new enhancement requests. This is available on the left side main navigation under 'Ideas + Feedback':



When clicked it will launch the UserVoice feedback form, which will allow you to enter your suggestion, category, describe your idea and attach any associated documentation:

The screenshot shows a web browser window with the title "Colleague Software's UserVoice Forum (Powered by UserVoice) - Google Chrome". The address bar shows a secure connection to "https://colleaguesoftware.uservoice.com/clients/widgets/classic_widget?mode=feedback&link_color=0a8cc6&forum_id=5888". The widget itself has a blue header with a lightbulb icon and the text "Give feedback", and a "Close" link. Below the header, a message in orange text says: "We would be grateful for your feedback on Colleague 7 [Beta] and will endeavour to update you on any changes resulting from your input." The form contains a text input field with placeholder text "As a... / When I... I need / want / expect to... So that...", a "Category" dropdown menu, and a larger text area for "Describe your idea... (optional)". There is an "Attach a File" link with a paperclip icon. At the bottom, it says "Signed in as david.payne <david.payne@colleaguesoftware.com>" and has a "Post idea" button. On the left side of the widget, there is a large orange box with the text "No ideas available".

N.B There is a registration process which a new user of this feature will need to do in order to raise an enhancement. Colleague also needs to verify your domain name (i.e. colleaguesoftware.com) on the UserVoice account in order to receive your request.

3.3 Search - Updated UI For Ease Of Use

As part of our ongoing tidy up and polish to the Colleague 7 UI, we have updated the **Search** so that workflows are categorised better and functionality is more apparent to the end user:

The screenshot displays the Colleague 7 Search interface. At the top, there is a navigation bar with tabs for 'Candidate', 'Company', 'Contact', and 'Requirement'. Below this is a toolbar with icons for 'Criteria', 'Saved Searches', 'View Records', 'View Text', 'Selected Items', 'Requirement Link', 'Add', 'Combine Results', and 'Options'. A 'Found: - records' status bar is on the right. On the left, a 'Criteria Settings' sidebar lists various search criteria: 'Text Criteria' (highlighted), 'Radius Search', 'Skill Criteria', 'Forenames', 'Surname', 'Direct Number', 'Mobile Number', 'Direct Fax', 'Email Address', 'Married', 'Title', 'Job Code', 'Address Line1', and 'City'. The main search area includes a 'Search Date Range' section with 'From' and 'To' input fields, a 'Search Term' section with a large text input box, and a 'Search On' section with checkboxes for 'All CVs', 'CVs', and 'History'.

Summary of Changes:

- Text on Reset Criteria changed to Criteria
- 'Email and SMS' button moved into two items within 'Selected Items'
- Unhide button moved into an item within Selected Items.
- Selected Items – View Records and View Text have become their own buttons on the navigation bar
- Found count is in larger text
- Show/Hide Results text link has become separate toggle button on top bar as per Hide/Show History
- Update Results button text becomes 'Combine Results'.
- Text Criteria search term text box height increased.

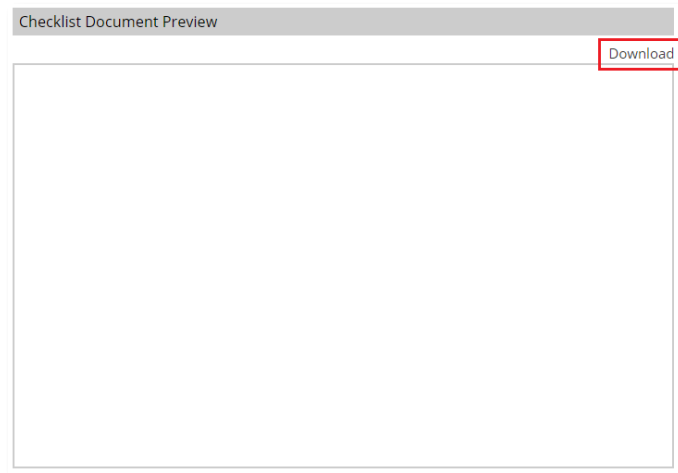
3.4 Security Update – Forgotten Password

There is now a maximum number of retries on entering the wrong password against a user. This is set as 10 by default. There is also a count on the number of failed attempts:

Invalid credentials entered. Login attempts remaining: 9

3.5 Download buttons and Hide/Show options

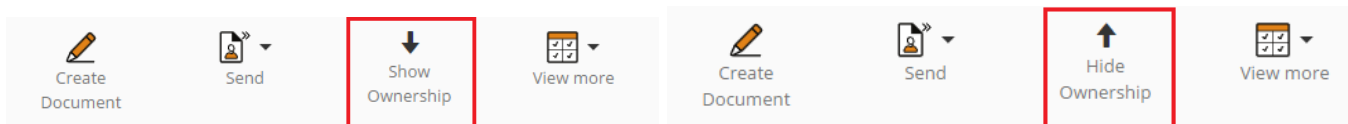
On both the History and Checklist items there was a 'Download' text link to download the associated document to the entry:



This is now a download button and the History & Checklist item layout has been realigned:

The interface shows a top toolbar with icons for Email, SMS, Create History, Create Document, Send, Show Ownership, View more, Hide Checklist, and Download (highlighted). Below the toolbar, the 'Checklist Item Details' section contains fields for User (David Payne), Sent Date, Status (Not Applicable), Notes (No Notes...), Upload Document (Choose file, No file chosen), and Mark As Complete (No). The 'Checklist Document Preview' section displays personal details for Bertie Portal, including Name, Address, Age, and Education and Qualifications.

There is also now a Show / Hide button for Ownership and Checklist items:



4. Bug Fixes

4.1 Issue When Scrolling Through Candidates From Search and Longlist

After opening a requirement and then selecting Search for Candidates, if you did a search, selected multiple results and then 'View Selected' items; when scrolling through the records you could choose 'View More' and 'Longlist' on the first candidate only, any other ones and you got an invalid requirement id message. This has now been resolved.

4.2 Incorrect Offer History Text

It was noted that the merges codes within the History text when making an Offer or Placement was incorrect. This has now been resolved:

Text	User
Simon Batty accepted the role of House Keeper (Ref 1), Start Date : 14 Oct 2016 00:00	Simon Batty
Simon Batty placed in the role of House Keeper (Ref ' + CONVERT(VARCHAR(25), @nPlacementId) + '), Start Date : ...	Simon Batty
Interview with Simon Batty for House Keeper (Ref 1). Interview date : 13 Oct 2016 16:20	Simon Batty
Stage updated to Sent for Simon Batty on requirement for House Keeper (Ref 1)	Simon Batty
Stage updated to ShortList for Simon Batty on requirement for House Keeper (Ref 1)	Simon Batty
Simon Batty linked to the role of House Keeper (Ref 1)	Simon Batty
New Requirement added for House Keeper (Ref ' + CONVERT(VARCHAR(25), @nRequirementId) + ')	Simon Batty

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4.3 Mailshot Status in Contacts always reverts back to 'Allow All'

When in a contact record and selecting a value from the Mailshot Status drop down box on Contact records it would appear to save but when the record is refreshed the Mailshot Status would revert back to 'Allow All'. Candidate and Company records saved the selected value without issue.

This has now been resolved.

Revision History

Version	Date	Summary of Changes	Author
1.0	19/04/17	Initial draft.	David Payne