

# Colleague<sup>7</sup>

## Release Notes

Build: 17.05.01

Colleague Software Ltd

Date Created: 17/05/17

## Colleague 7 Release Notes - 17.05.01

### 1. Introduction

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

### 2. About This Release

Sprint Goal: To finalise the 'Documents Received' workflow by allowing a user to manually lookup a record when attaching a document as well as continue to further enhance the connectivity between records by introducing a Requirements Tab for Candidates, Companies and Contacts.

### 3. New Features

#### 3.1 Attach Documents to Existing Records – Manual Lookup

From within the 'Documents Received' section, when attaching a document to an existing record, there is now an option to manually lookup a record.

You are able turn on/off the auto match of records and can include Live Requirements and Placements as an option. Auto matched and manually searched records will combine into the same result.

The 'Attach Document' process will also support attaching a document to multiple records at the same time via this process.

Parse Attachment(s) Attach document to record(s) Save Attachments Cancel

Auto-matched records based on sender email address

Show records associated to sender email? Yes

Include Live Requirements? No

Include Placements? No

Show 10 entries

Search for records

Enter search criteria Search...

Type	Id	Description
<input type="checkbox"/>	8805	Daniel Woodsford - Telephone: 01243629854, Location: Chichester
<input type="checkbox"/>	369	David Payne - Telephone: 07777 777776, Location: Vinnetrov Road
<input type="checkbox"/>	104	David Payne at DP Publications Limited
<input type="checkbox"/>	32	DP Publications Limited

Showing 1 to 4 of 4 entries Previous 1 Next

## 3.2 Requirements Tab on Candidates, Contacts and Companies

There is now a Requirements tab on the Candidate, Contact and Company entity which gives an overview, filtered by Requirement Status, of all Requirements linked with that record. The user then has access to the associated records via the entity icon (same as the 'Spec CV Sent' tab).

The 'Current Stage', on the Candidate Requirements tab, will be the stage the candidate has reached in the Recruitment process (i.e. Shortlist, Sent, Interview)

The 'Current Stage', on the Company and Contact tab, will be stage of the candidate who is furthest along in the Recruitment process.

You can also Create a New Requirement from the Contact and Company records.

Colleague7 David Payne (Candidate: 369)

Summary > Personal > History > Documents > Notes > Skills > Custom Profile > Situation > Checklist > Spec CVs Sent > **Requirements**

Requirement Status: Live

ID No	Company	Contact	Job Title	Type	Current Stage	Date of Last Stage Update	
600	DP Publications Limited	David Payne	Account Director	Permanent	Interview	11 May 2017	👤 📄 📅
383	Pet Shop Boys	John Blood	Professional Assistant	Permanent	LongList	15 Jul 2016	👤 📄 📅
183	Acme Explosives	Richard Wilson	Logistics Manager	Permanent	Sent	21 Nov 2016	👤 📄 📅
354	DP Publications Limited	David Payne	Account Manager	Contract	Placed	22 Oct 2015	👤 📄 📅

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## 3.3 Linked Documents – Delete Option

There is now an option to delete a document which has been attached to a record.

Summary > Personal > History > Documents > Notes > Skills > Custom Profile > Situation > Checklist > Spec CVs Sent >

Email SMS Create History Create Document Send Show Ownership View more Add New **Delete** Edit

Available Documents

- CV (DPayne\_CV.docx)
- Twitter (Mon Nov 07 2016) (https://twitter.com/search?f=use

Document Preview

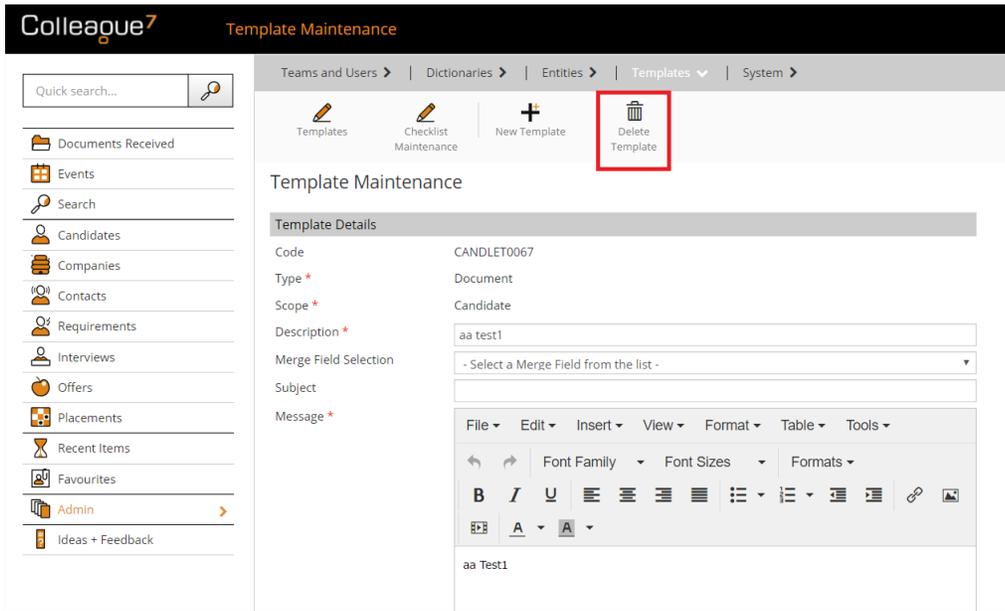
PERSONAL DETAILS

## 3.4 Search Text Options – Default ‘Contains’ rather than ‘Begins With’

When searching, the default search option linked with the text field is now ‘Contains’ rather than ‘Begins With’.

## 3.5 Letter Templates – Delete Option

There is now an option to delete a letter template in template maintenance:



## 4. Bug Fixes

### 4.1 Resolve Interview Date/Time (using Server time) Issue

When booking an interview, the date/time that was created in the diary was the server's date/time, not the local users date/time. This would lead to the date of the interview appearing in the diary as an hour behind. This has now been resolved.

### 4.2 Undo Placement

When undoing a placement there comes a point when the user should not be allowed to run this workflow (i.e. if the placement is authorised at any level then the user should not be allowed to 'Undo'). This has been resolved.

### 4.3 When Creating A Requirement and Clicking on the Address 'plus' icon

When creating a new requirement, if you clicked on the Address plus icon, an alert would say "select a contact first", even if a contact had been selected. This has now been resolved.

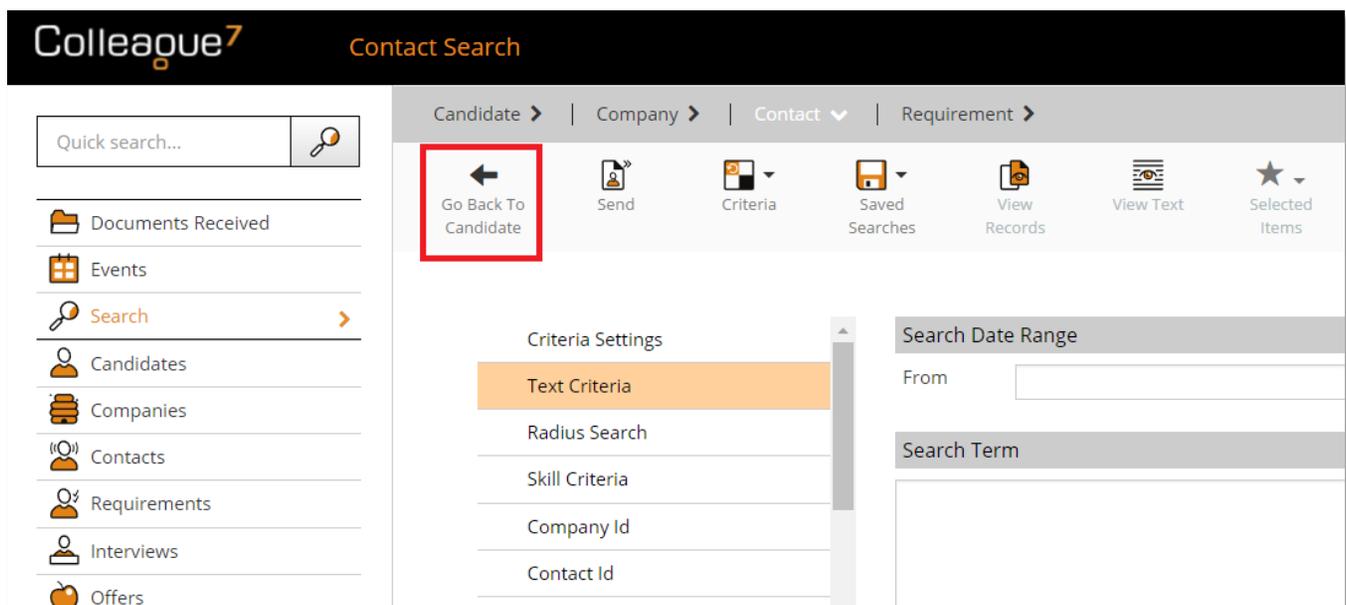
### 4.4 Icon/Text Alignment

As part of a series of UI related updates relating the Colleague 7, work was undertaken to ensure all icon labels align correctly.

### 4.5 No Return To Candidate Option when using 'Send to Contact' Workflow

When in a Candidate record and using the 'Send to Contact(s)' feature, it takes the user to a Contact Search linked with the Candidate. There was then no way to return to the Candidate once you had sent the candidates CV to the contact(s).

A button has now been added to the toolbar.



#### **4.6 Rates List on Requirements only displays new entries after a refresh**

When adding a new Rate to a Requirement the new Rate would not appear on saving, it would only do this after a refresh. This has now been resolved.

#### **4.7 Candidate/Contact lookup is still displayed after sending / discarding the email**

When a user selects to discard or send an email, after selecting the candidate or contact lookup ('To' / 'CC' partial view search), the partial view search would remain displayed after the email form was hidden. This has now been resolved so that the lookup partial view will also minimise with the sending or discarding of the email.

## 5. Investigative Items

### 5.1 Look At Current Use Of Session Variables and Investigate Alternative Methods To Improve Performance

#### Outcome:

After looking at the impact of using session variables, we have established several areas of the system where we can improve performance. This investigation has now set out a series of development work items which we will be working on over the coming sprint.

Further investigation and works may also occur at a later date.

## Revision History

Version	Date	Summary of Changes	Author
1.0	17/05/17	Initial Draft	David Payne
1.1	17/05/17	Final Version	David Payne