Release Notes

Build: 17.07.01

Colleague Software Ltd

Date Created: 14/07/17

Colleague 7 Release Notes - 17.07.01

1. Introduction

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

2. About This Release

Sprint Goal: Begin delivering items from the Admin project to ensure users have the means to fully self-service when administrating Colleague 7.

3. New Features

3.1 3623 - Deleted items processing required - Admin

State: Done

Type: Enhancement

User Notes:

A new section 'Delete or Undelete Records' has been added to the Admin > Entities area.
This section can only be accessed if the User has the User Group Permission 'Delete Records' set to ‘Full Access’. Deletion or Undeletion is possible for Candidates, Companies and Contacts (based on the Entity Lookup).

To Delete Entity Records the User must click the 'Delete [Entity_Name]' button and select Records from a Partial View. On selecting Records to Delete, the User is prompted with an alert and asked if you wish to proceed ('Yes' proceeds with the Delete, 'No' cancels the action). On success an Alert is displayed and the Records will be displayed in the 'Deleted [Entity_Name]' list.

To Undelete Records, lines can be selected in the 'Deleted [Entity_Name]' grid, upon which a 'Undelete [Entity_Name]' button will appear. On pressing the button, the User is prompted with an alert on whether he wants to proceed ('Yes' proceeds with the Undelete, 'No' cancels the action). On success an Alert is displayed and the Records will be removed from the 'Deleted [Entity_Name]' grid.

Note that the grid can be Hidden/Shown via a Hide/Show button. Also note that Histories are automatically created for both the Delete and Undelete Processes.

3.2 8339 - Deleted items processing required - Entity Selection

State: Done

Type: Enhancement

User Notes:

Functionality is now available to Delete and undelete an entity record from within an entity (Candidate/Contact/Company), Bulk delete and undelete entity records within Search (Candidate/Contact/Company), View deleted records on entity selection and quick search (Candidate/Contact/Company).

3.3 12151 - Admin - Have An Option To Merge Records.

State: Done

Type: Enhancement

User Notes:

The new 'Merge Records' screen allows Users to select an Entity Record to Merge from ('Merge' Field) into another Entity Record of the same type ('Into' field). Entity Records can be selected via the standard Partial View by clicking on the 'Search' icon, and fields can be cleared by clicking the 'Delete' (cross) icon.

Once two Entity Records have been selected the User is prompted whether they want to Proceed. On clicking 'No' the fields will remain populated; the Alert can be shown again by pressing the 'Merge Records' button. Clicking the 'Cancel' button will clear the form completely. If you click 'Yes' in the Alert, if the Merge is successful you will receive a success Notification. Note that the Merge Alert and buttons will only appear if both fields are populated. The 'Merge' From Record will be marked as deleted, the 'Into' Target Record will contain any merged data from the source Record and both will be History Stamped.

3.4 15932 - Option to Delete Custom Field

State: Done

Type: Enhancement

User Notes: Users with administrative privileges now have the ability to remove custom fields.

3.5 17188 - No Skills or Postcode option when running 'Search for Candidates'

State: Done

Type: Enhancement

User Notes: Searching for candidates from a requirement record now has the option of using the postcode and/or skills from the requirement as a basis for the candidate search.

3.6 18155 - Login Process (When Disconnecting The Old Session).

State: Done

Type: Enhancement

User Notes: The button on the Sign In form is now labelled 'Sign In'.
If a User already has a Session, a Yes and No button is now presented (on pressing 'Yes' the Sign In proceeds overwriting the Session, 'No' cancels the Sign In). The 'Cancel' link in the 'Reset Password' screen has been made into a button for consistency.
There have also been some minor style changes made in the 'Reset Password' confirm screen. One other thing to note is the 'Forgot Password?' link will not appear as it used to after you've gone through the 'Reset Password' process (as you've just gone through the process it doesn't make sense to display the link), nor will it appear in the Yes/No button screen.

3.7 18263 - Terminology/Label Updates Required.

State: Done

Type: Enhancement

User Notes:
The Options in the User Menu have been made more user friendly (there is a further PBI to move the 'Quick Create' Options to their own Menu).
'Personal Settings' is now 'User Settings'.
'Email Settings' is now 'Email Signature'
'Email Inbox' is now 'Documents Received'
'Events' is now 'Diary'
Candidate Requirements -> Sent Column is now 'CV Sent'
Placement -> Additional is now 'Rates'
'Ideas + Feedback' is now 'Ideas & Feedback':

3.8 19013 - Add Reminders To Diary Entries

State: Done

Type: Enhancement

User Notes: Events can now be created with a reminder value, the same as you can in Outlook.

4. Bug Fixes

4.1 19486 - Recent Items ignores 'Show Entries' setting

State: Done

Type: Bug

User Notes: The 'Show Entries' option now works (before it was hard coded to only show 10 even if you changed the option).

4.2 18289 - Email Logging from Companies

State: Done

Type: Enhancement

User Notes: Auto-email logging of the Inbox and Sent Items folders now creates history records for any companies on the system that have matching company email address

Colleague

Revision History

Version	Date	Summary of Changes	Author
1.0	14/07/17	Initial Draft	David Payne