

# Colleague<sup>7</sup>

## Release Notes

Build: 17.11.02

Colleague Software Ltd

Date Created: 28/11/17

## Colleague 7 Release Notes - 17.11.02

### 1. Introduction

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

### 2. About This Release

Sprint Goal: Continue to enhance and refine the Search based on client feedback and to complete phase three of the 'Right To Consent' GDPR work.

### 3. New Features

#### 3.1 Right to Consent - Opt In / Out

State: Done

Type: Enhancement

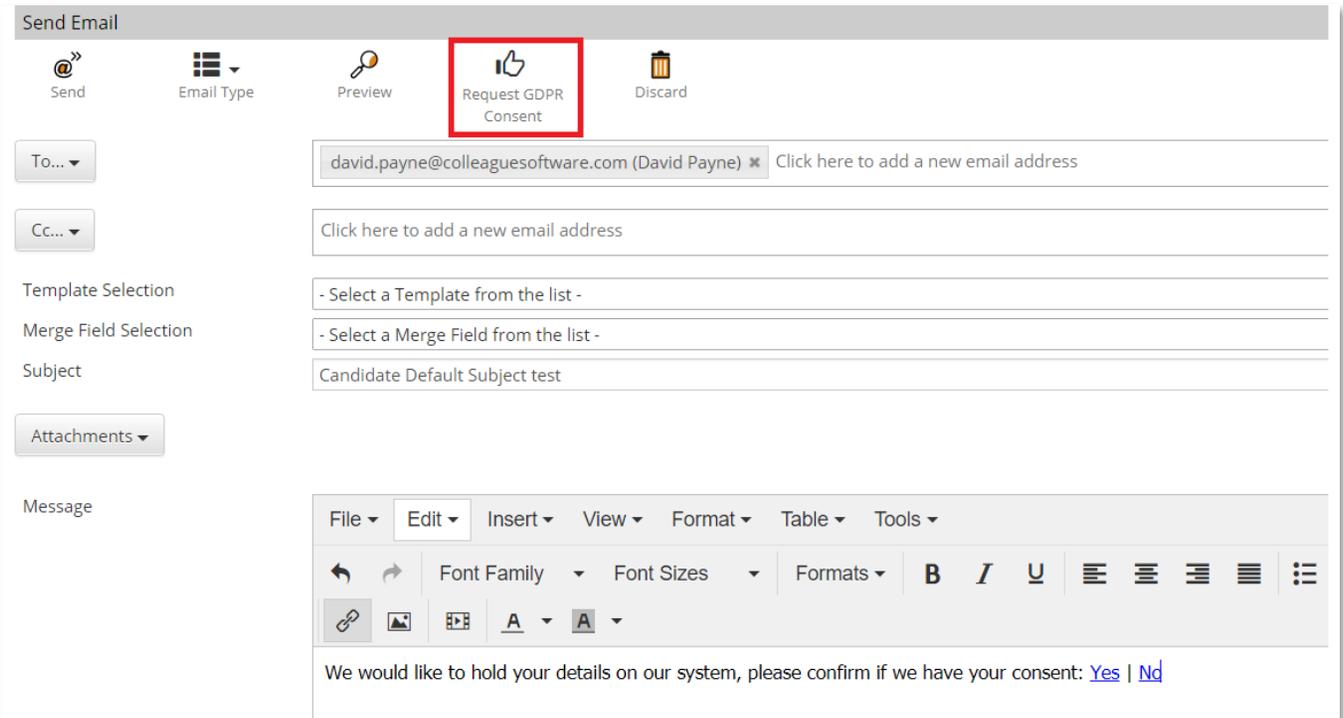
User Notes:

The button and form from Phase 1 of the GDPR Work (Candidate and Contact Entities) has had some minor label changes made following feedback.

Clicking on the button reveals the form and it defaults to the values shown below (the button will only appear if **Global Settings -> Candidate/Contact -> Enable GDPR - Right to Consent feature?** is set to **Yes**):

The screenshot shows a user interface for a candidate entity. At the top, there is a toggle switch for 'Enable GDPR - Right to Consent feature?' which is currently set to 'Yes'. Below this, a navigation bar contains various icons for actions like 'Email', 'SMS', 'Create History', 'Create Document', 'Send', 'Show Ownership', 'GDPR Consent Not Given' (highlighted with a red box), and 'View more'. A modal form is open, titled 'GDPR Consent Not Given'. It contains three input fields: 'GDPR Consent Given' (with a dropdown menu set to 'No'), 'Consent Requested On', and 'Response Received On'. There are 'OK' and 'Cancel' buttons at the bottom right of the modal.

In the Email Form a new button **Request GDPR Consent** has been added.



On pressing this button HTML from the **Global Settings -> GDPR Consent -> Email Body HTML** setting (see below) will be inserted into the email (the URL links which navigate the recipient to a thank you page will also use the Consent Received URL and Consent Denied URL global settings, again see below):

Show  entries

Section	Description	Setting
GDPR Consent	Webpage to navigate to on clicking the 'No' link in the GDPR Consent email.	<a href="https://www.colleaguesoftware.com">https://www.colleaguesoftware.com</a>
GDPR Consent	Webpage to navigate to on clicking the 'Yes' link in the GDPR Consent email.	<a href="https://www.colleaguesoftware.com">https://www.colleaguesoftware.com</a>
GDPR Consent	Email body content (HTML) for the GDPR Consent email.	<code>&lt;span&gt;We would like to hold your r</code>

Showing 1 to 3 of 3 entries Previous  Next

When the HTML is inserted into the body of the email its response can now also be tracked via the Colleague Cloud Service.

On sending the email the following alert will appear in the Candidate/Contact Record (including each time you open the Record) and the **Consent Request On** value will be updated:

Email
SMS
Create History
Create Document
Send
Show Ownership
GDPR Consent Not Given
View more

Awaiting GDPR Consent from the Candidate. ✓ OK

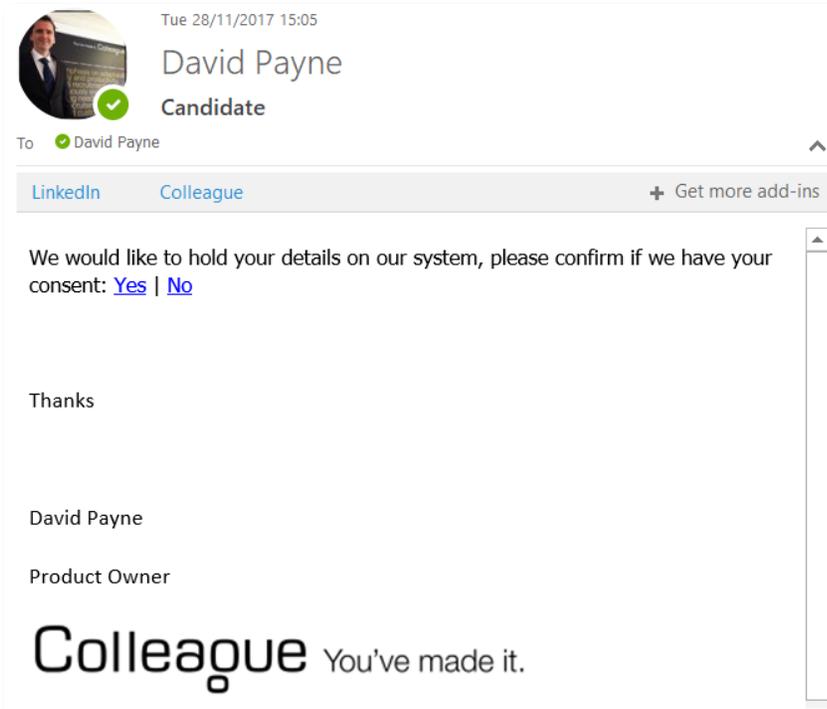
Consent Requested On: 28 Nov 2017

GDPR Consent Given:  ✓ OK ✗ Cancel

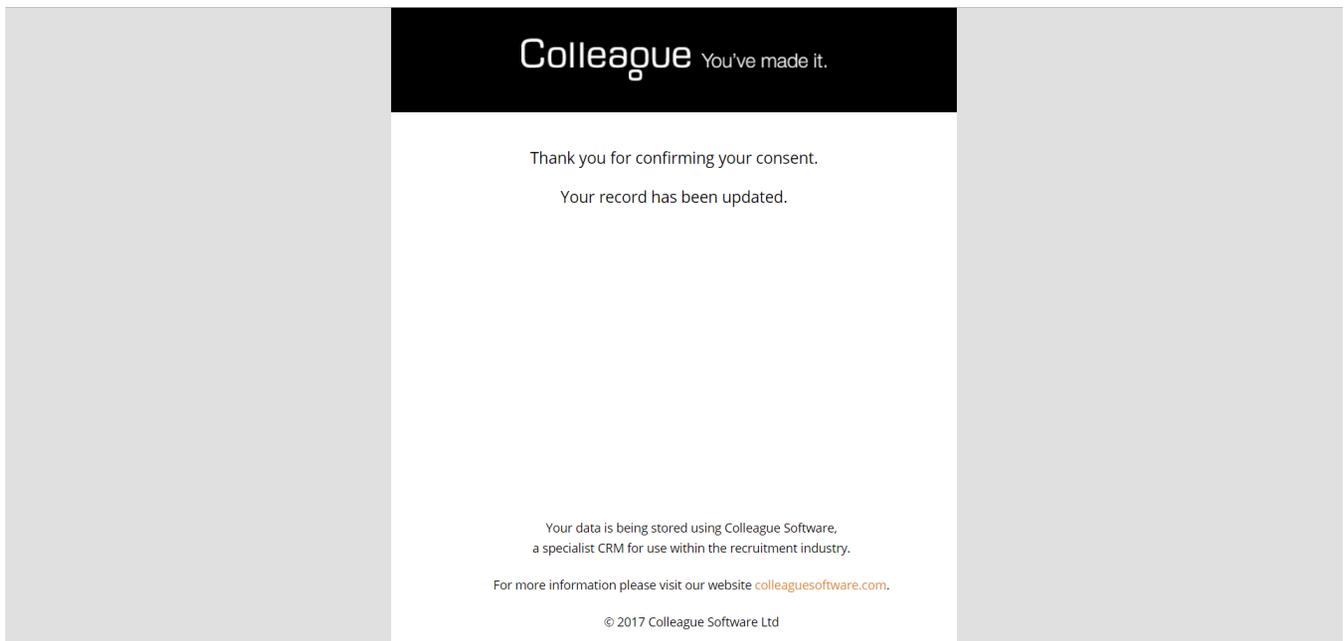
Consent Requested On:

Response Received On:

This is what the email looks like in Outlook:



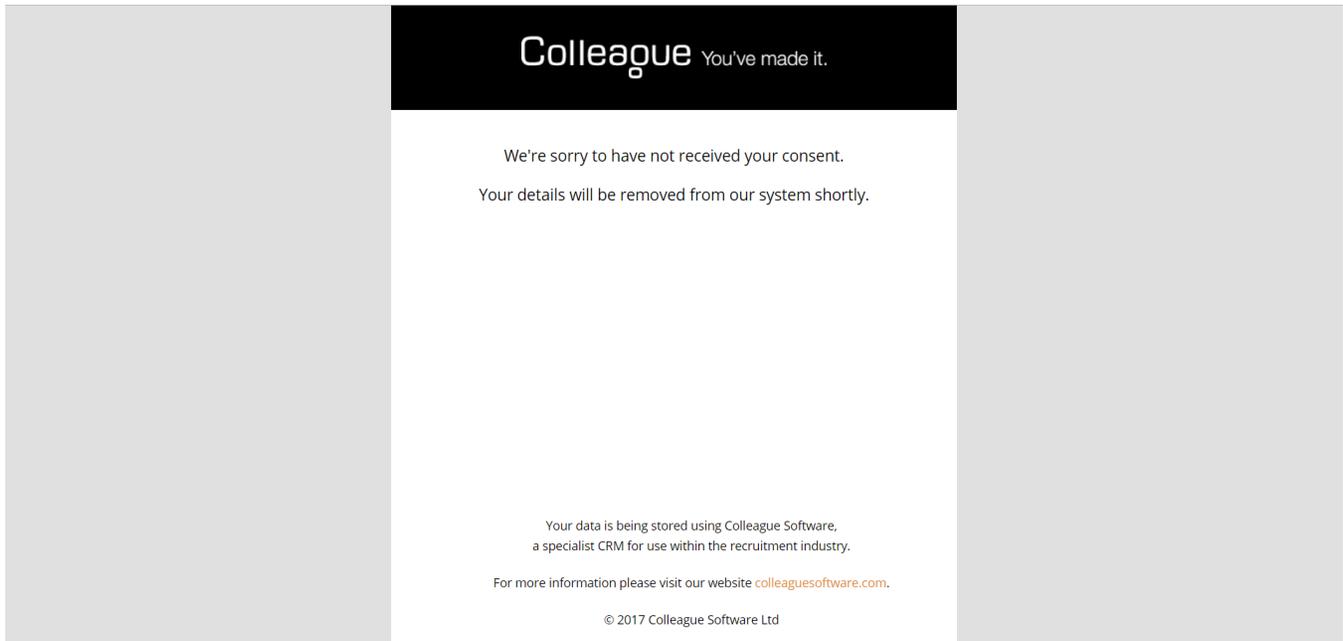
On clicking **Yes** in the email, the following webpage is opened by default:



On clicking **Yes** in the email, the button and form values will appear like this in Colleague7:



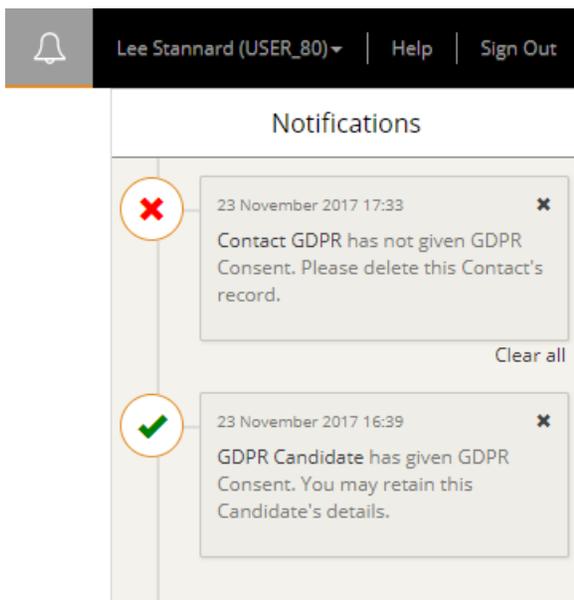
On clicking **No** in the email, the following webpage is opened by default:



On clicking **No** in the email, the button and form values will appear like this in Colleague7:



On GDPR Approval or Denial the following Notifications will appear for the user who sent the email requesting consent:



History logs are created for every stage of the GDPR request process.

## 3.2 Include Diary Duration

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State: Done

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Type: Enhancement

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User Notes: When creating a new diary item (via creating a new history for example), a user can now set the end date and time of the diary item.

The default duration of the diary item is determined by a new Global and Personal Setting (or 15 minutes if neither setting has been defined)

If the start date and time of the diary item is updated, the end date and time is also updated according to the default duration defined by the Personal or Global Setting.

Create Diary  Create Task

**Diary Details**

Subject: Follow Up Offer

Start Date: 28 Nov 2017

Start Time: 15:00

End Date: 28 Nov 2017

End Time: 16:00

Type: Visit

Reminder: 15 minutes

Additional

## 3.3 Show/Hide Search Criteria Button

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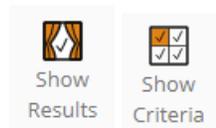
State: Done

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Type: Enhancement

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User Notes: Within search, the 'Show Results' button will now switch between showing the search results or the search criteria, as opposed to displaying both at the same time.



## 3.4 Unable To Select Custom Fields (and Custom Data Dictionary fields) in Search and Selection Screens

State: Done

Type: Enhancement

User Notes: Custom fields are now available as listing options for the selection screens, search results and the company contacts listing tab. By default, all custom fields are available as a listing options, this can be updated in custom fields maintenance using the new 'Allow Selection' drop down for each custom field.

Custom Field Details

Type *	<input type="text" value="Text"/>
Label *	<input type="text" value="Candidate Custom Text Field"/>
Display Sequence *	<input type="text" value="1"/>
Group *	<input type="text" value="None"/>
Allow Selection	<input type="text" value="Yes"/>

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Groups

Show  entries

Sequence	Name
No data available in table	

Showing 0 to 0 of 0 entries Previous Next

Fields

Show  entries

Sequence	Label
1	Candidate Custom Text Field
2	Candidate Custom Date Field
3	Candidate Custom Integer Field
4	Candidate Custom Decimal Field
5	Candidate Custom Flag
6	Candidate Custom Lookup

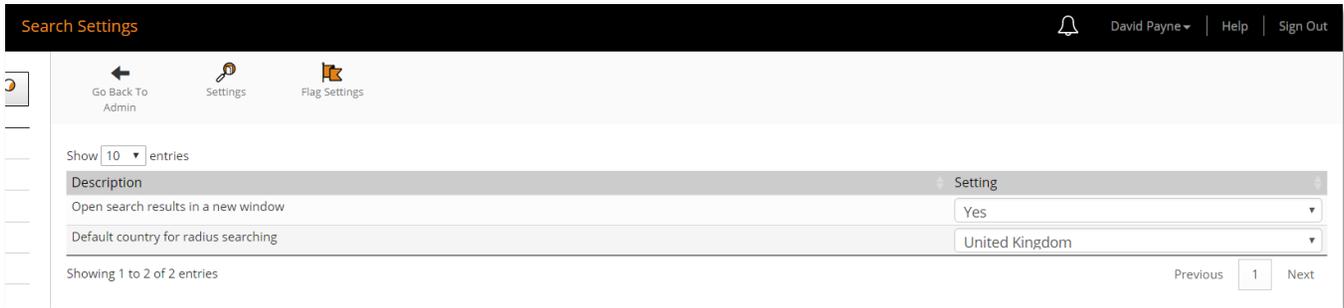
Showing 1 to 6 of 6 entries

## 3.5 Flag Settings In Search Results

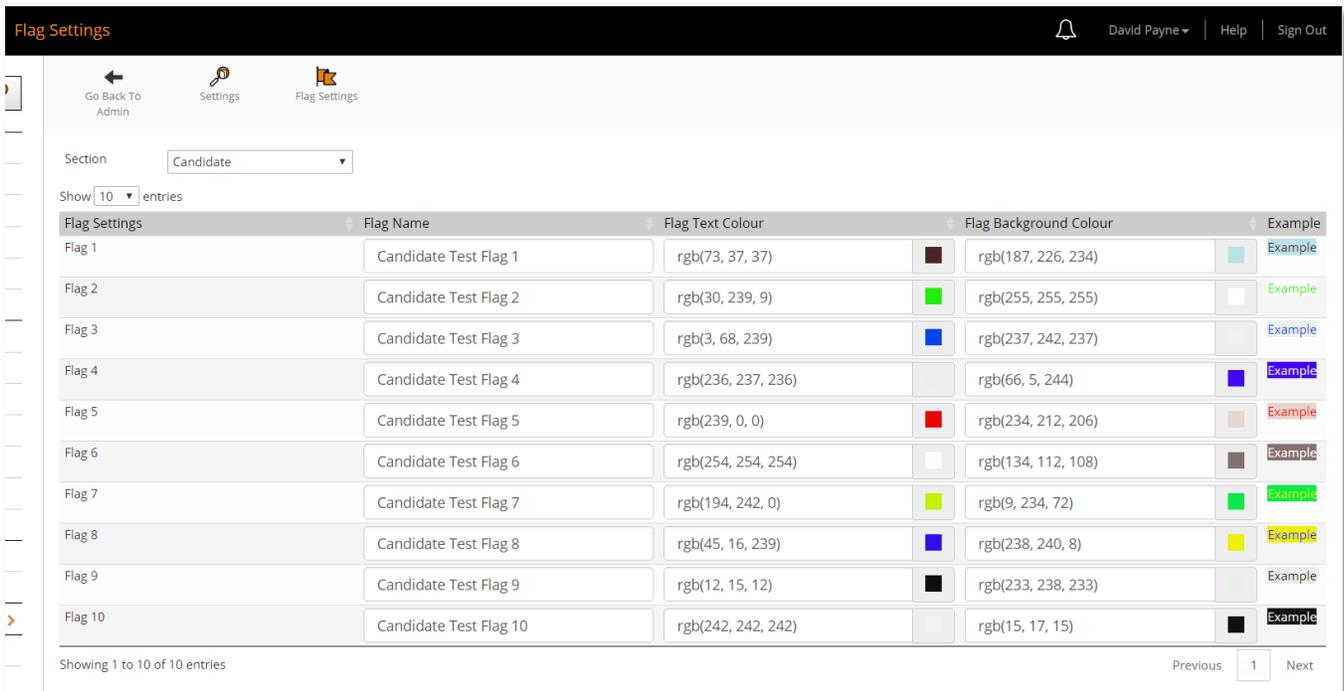
State: Done

Type: Enhancement

User Notes: In the Admin area, there is a new button 'Search Settings'. Clicking this button will navigate the user to the Search Settings page. This page is similar to the Global Settings page, but only shows settings related to the Search.



On the bar across the top there is a "Flag Settings" button. Clicking this button will navigate the user to the Flag Settings page.



On this page, the user can define the text, back colour and text colour for 10 flags for Candidate, Company, Contact and Requirement.

Clicking on either the Back Colour or Text Colour of a flag will show a colour picker, where the user can define the colour to be used. The "Example" column at the end of the table shows how the current flag settings will look.

On Search, the flag settings for the particular entity will be available. After selecting search record(s), the user can then select a flag from the list above, and the selected records will then be coloured according to the flag settings defined.

The screenshot shows the Colleague search results page. At the top, there are navigation icons for Criteria, Saved Searches, View Records, View Text, Selected Items, Requirement Link, Add, Options, and Show Criteria. A search bar on the right indicates 'Found: 5 records'. Below the search bar, there are filters for 'Show Selected' (set to 'All') and 'Show 100 entries'. A table of search results is displayed with columns for Found, Flag, Candidate ID, Surname, and City. Two records are selected, and a context menu is open over them. The menu includes options like Email, SMS, Flag, Hide, Unhide, Remove From Results, Archive Record(s), Unarchive Record(s), and Add To Favourites. A sub-menu for 'Remove Flag' is also visible, listing 'Candidate Test Flag 1' through 'Candidate Test Flag 10'. The bottom of the page shows 'Showing 1 to 5 of 5 entries (2 selected)' and pagination controls for 'Previous', '1', and 'Next'.

### 3.6 Option To Open Records In New Tab From Search

State: Done

Type: Enhancement

User Notes: Items within search results can now be set to open in a new window/tab by default when pressed. Within 'User Settings' under 'Search Options' (or in Admin within 'Search Settings'), a new setting called 'Open search results in a new window' will appear which can be set to Yes or No. The default value will be 'No'.

The screenshot shows the 'User Settings' page in Colleague. The 'Section' dropdown is set to 'Search Options'. Below the dropdown, there are two settings listed in a table. The first setting, 'Open search results in a new window', is highlighted with a red box and has a dropdown menu set to 'Yes'. The second setting, 'Default country for radius searching?', has a dropdown menu set to 'United Kingdom'. The bottom of the page shows 'Showing 1 to 2 of 2 entries' and pagination controls for 'Previous', '1', and 'Next'.

## 4. Bug Fixes

### 4.1 Searching Lookups / Flags for "Records with no value"

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State: Done

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Type: Bug

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User Notes: When using the search, against all Lookups, Yes/No and Date fields, there will be the option to select "No Value". This will find all records with no data held in this field.

## Revision History

Version	Date	Summary of Changes	Author
1.0	28/11/17	Initial Draft	David Payne