



## Release Notes

Build: 17.12.02

Colleague Software Ltd

Date Created: 10/01/18

## Colleague 7 Release Notes - 17.12.02

### 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 as well as to deliver on workflow enhancements and minor updates to the UI.

### 3. New Features

#### 3.1 Top Menu - 'Quick Create' Options

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State: Done

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Type: Enhancement

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User Notes: The 'Quick Create' options have been moved to a new menu, the previous text options have been changed to icons (bar for the User Menu) and Bootstrap tooltips have been added for icons without sub-menus.



#### 3.2 Hide Social Media Links in Documents

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State: Done

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Type: Enhancement

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User Notes: Social Media Link types have now been removed from the 'Documents' tab. The main three 'Social Media' types (i.e. Facebook, LinkedIn and Twitter) are also not selectable in the 'Document Type' dropdown. These should only be accessed the 'Social Media Links' area moving forwards.

In the Social Media Links Section, the 'Delete' grid buttons will be disabled (i.e. not clickable, not allowed icon on hover) if no URL has been assigned for one of the default values (as there is nothing to delete).

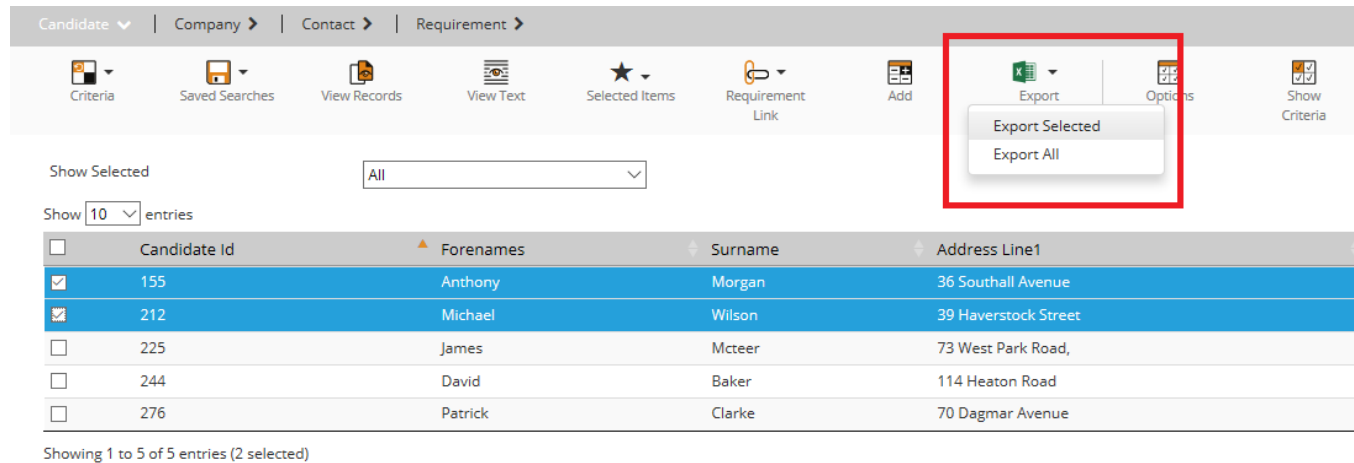
On clicking a disabled/non populated Social Media Link the 'Add New' form now appears with default values populated.

## 3.3 Option to Export a Search Result to Excel

State: Done

Type: Enhancement

User Notes: In each Search Entity there is now the following button which allows you to 'Export All' or just selected results to a CSV file (a loading overlay will be displayed whilst processing).  
The button is only visible if the current User has the relevant permission set.  
'Export All' enables on running a Search whilst 'Export Selected' enables on selecting Search Results.



The screenshot shows the top navigation bar with tabs for Candidate, Company, Contact, and Requirement. Below the navigation bar is a toolbar with icons for Criteria, Saved Searches, View Records, View Text, Selected Items, Requirement Link, Add, Export, Options, and Show Criteria. The 'Export' button is highlighted with a red box, and its dropdown menu is open, showing 'Export Selected' and 'Export All' options. Below the toolbar, there is a 'Show Selected' dropdown set to 'All'. Below that, a table shows search results with columns: Candidate Id, Forenames, Surname, and Address Line1. The first two rows are selected (checked). The table shows 5 entries, with 2 selected.

Candidate Id	Forenames	Surname	Address Line1
155	Anthony	Morgan	36 Southall Avenue
212	Michael	Wilson	39 Haverstock Street
225	James	McTeer	73 West Park Road,
244	David	Baker	114 Heaton Road
276	Patrick	Clarke	70 Dagmar Avenue

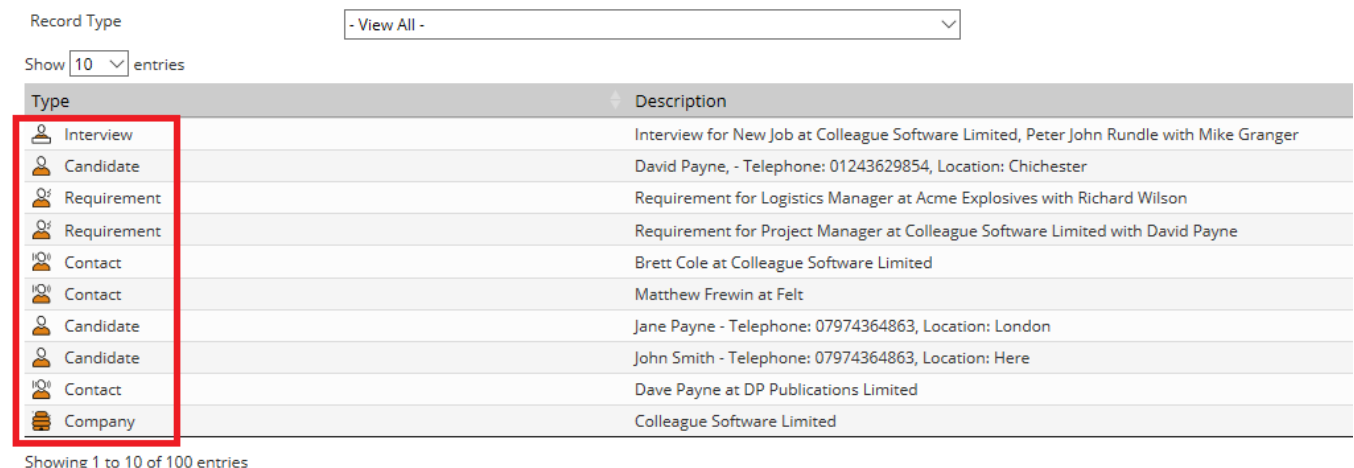
Showing 1 to 5 of 5 entries (2 selected)

## 3.4 Show Description Names Alongside Icons

State: Done

Type: Enhancement

User Notes: The Entity Name Text now appears next to the Entity icon in all 'Quick Search' style grids (i.e. Quick Search, Documents Received, Favourites and Recent Items):



The screenshot shows the 'Record Type' dropdown set to '- View All -'. Below it, a 'Show' dropdown is set to '10'. Below that, a table shows search results with columns: Type and Description. The 'Type' column now displays the entity name next to the icon, which is highlighted with a red box. The table shows 10 entries, with 100 total entries.

Type	Description
Interview	Interview for New Job at Colleague Software Limited, Peter John Rundle with Mike Granger
Candidate	David Payne, - Telephone: 01243629854, Location: Chichester
Requirement	Requirement for Logistics Manager at Acme Explosives with Richard Wilson
Requirement	Requirement for Project Manager at Colleague Software Limited with David Payne
Contact	Brett Cole at Colleague Software Limited
Contact	Matthew Frewin at Felt
Candidate	Jane Payne - Telephone: 07974364863, Location: London
Candidate	John Smith - Telephone: 07974364863, Location: Here
Contact	Dave Payne at DP Publications Limited
Company	Colleague Software Limited

Showing 1 to 10 of 100 entries

### 3.5 Please add 'Calibri' to the Text Editor as a font option

State: Done

Type: Enhancement

User Notes: The font 'Calibri' has now been added to the text editor controls in Colleague7 and can be selected as the default font in Global and Personal Settings..

### 3.6 User Permission To Disable Document Edit/Download Options?

State: Done

Type: Enhancement





User Notes: There is a new User Group Permission "Edit/Download Documents", that can be found in the Admin area. This permission controls whether the "Edit" and "Download" buttons found on the Documents tab of entity records will be displayed or not.

### 3.7 Add Icons To Hyperlinks

State: Done

Type: Enhancement

User Notes: Entity icons are now shown alongside hyperlinks that take the user to the relevant entity. Also when adding a manual situation to a candidate record, the Linked to Placement field now defaults to No (previously named 'Placed By Us').

◀ ▶ Situation Details	
Job Type	Rolling Contract ▼
Job Title	 Test Bb
Notes	
Company	 Colleague Software Limited
Contact	 Mike Granger
Location	The Control Tower, Witchcraft Way, Rackheath, Norwich, United Kingdom, NR13 6GA ▼
Working Company	 Colleague Software Limited
Owning Company	Colleague Training
Start Date	16 Jun 2017

## 3.8 Individual Send To Contact Approach

State: Done

Type: Enhancement

User Notes: New functionality has been added to allow the sending of a candidate directly to a single contact. This is run from the newly labelled 'Submit' button on the Context Menu of a candidate record. When you press 'Spec CV Send to Contact' it will launch a partial view allowing you to lookup a contact:

[Summary >](#) | [Personal >](#) | [History >](#) | [Documents >](#) | [Notes >](#) | [Skills >](#) | [Custom Profile >](#) | [Situation >](#) | [Checklist >](#) | [Spec CVs Sent >](#) | [Requirements >](#)

Email
 SMS
 Create History
 Create Document
 Submit
 Show Ownership
 GDPR Consent Given
 View more

Send CV to Contact Lookup

[Lookup](#)
[Select](#)
[Cancel](#)

Surname 
 Forenames 
 Wildcard Options

Show  entries

Forenames	Surname	Email Address	Direct Number	Company Id
No data available in table				

Selecting a contact will prompt an email to be generated whereby you can send the Candidate's CV.

On the Spec CV Sent tab, it will list all instances of Spec CV sending which occur, you will be able to filter on individual sending to contacts and/or spec cv sends to multiple contacts (via the Search):

[Summary >](#) | [Personal >](#) | [History >](#) | [Documents >](#) | [Notes >](#) | [Skills >](#) | [Custom Profile >](#) | [Situation >](#) | [Checklist >](#) | [Spec CVs Sent >](#) | [Requirements >](#)

Email
 SMS
 Create History
 Create Document
 Submit
 Show Ownership
 GDPR Consent Given
 View more

Type

Show  entries

By	Company Name	Contact Name	Date Sent
David Payne	Colleague Software Limited	Mike Granger	10 Jan 2018
David Payne	DP Publications Limited	Dave Payne	4 Jan 2018
Simon Batty	Simons Company	Simon Batty	2 Jan 2018
Simon Batty	Friday Balls	Friday Balls	2 Jan 2018

Showing 1 to 4 of 4 entries

## 4. Bug Fixes

### 4.1 Revise Text Searching Setup

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State: Done

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Type: Bug

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User Notes: Updates have been made to improve the stability and performance of document searching.

### 4.2 Ensure MsGraph Cache items do not expire

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State: Done

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Type: Bug

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User Notes: An issue has been corrected in relation to the storage of Microsoft Graph data within Colleague, which was causing users to experience timeouts and error messages relating to OneDrive and Microsoft integration in general.

### 4.3 Custom Field Columns Missing Data In Search Results

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State: Done

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Type: Hot Fix

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User Notes: An issue where custom field data was not showing in search results has been resolved.

### 4.4 Help with Clicking On Contact From Company

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State: Done

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Type: Hot Fix

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User Notes: Resolved an issue where contacts could not be accessed from within a company record.

## Revision History

Version	Date	Summary of Changes	Author
1.0	11/01/18	Initial Draft	David Payne