

Colleague⁷

Release Notes

Build: 18.03.01

Colleague Software Ltd

Date Created: 20/03/18

Colleague 7 Release Notes - 18.03.01

1. Introduction

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

2. About This Release

Sprint Goal: Deliver our established solution for managing embedded images within email signatures, and to undertake key updates to Requirement workflow based on client feedback.

3. New Features

3.1 User Filter on User Overview

State: Done

Type: Enhancement

User Notes: The "User Overview" on the Home page can now display information for any user.

The screenshot shows the Colleague 7 user overview interface. At the top, there is a navigation bar with the Colleague 7 logo, a search bar, and user information (David Payne). Below the navigation bar, there is a sidebar with various menu items. The main content area is titled "View Team Overview" and "Overview". A dropdown menu is visible, showing "David Payne" as the selected user. Below the dropdown, there are five circular gauges representing different metrics: Live Requirements (9), CVs Sent (16), Candidate Calls (10), Contact Calls (15), and Interviews Arranged (42). Below the gauges, there is a table showing a list of entries with columns for Date, Job Title, and Company. The table shows 9 entries, with the first entry being "23 Feb 2018" for "Account Manager" at "Colleague Software Limited".

Date	Job Title	Company
23 Feb 2018	Account Manager	Colleague Software Limited
09 Oct 2017	Project Manager	Colleague Software Limited
06 Oct 2017	Project Manager	Colleague Software Limited
10 Aug 2017	Account Manager	Colleague Software Limited
21 Jul 2017	Account Director	DP Publications Limited
09 Jun 2017	Support Project Assistant Manager	DP Publications Limited
03 May 2017	Project Director	DP Publications Limited
25 Apr 2017	Account Executive	DP Publications Limited
01 Jun 2011	Logistics Manager	Acme Explosives

Changing the user in the drop down will then display the information for that user. On loading the Home page, the drop down will always default to the login user.

The visibility of this drop down is controlled by a new User Group Permission "Overview - Change User Setting" (this will default to "No Access")

3.2 Inline CV Links - For All Document Types

State: Done

Type: Enhancement

User Notes: When running the 'CV Send' workflow (either Spec CV or from a Requirement), all document types are now available when selecting to insert a document link for emailing. Previously this was just documents assigned to a document type with the CV setting set to 'Yes'.

3.3 Exclude leavers from all contact lookup partial views and give option on selection screen

State: Done

Type: Enhancement

User Notes: When running a Contact Selection search or any partial view Contact search in general, there is now an 'Include Leavers' option. This will be default to 'No'.

Contact Lookup

Surname

Forenames

Wildcard Options

Include Leavers

Show entries

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

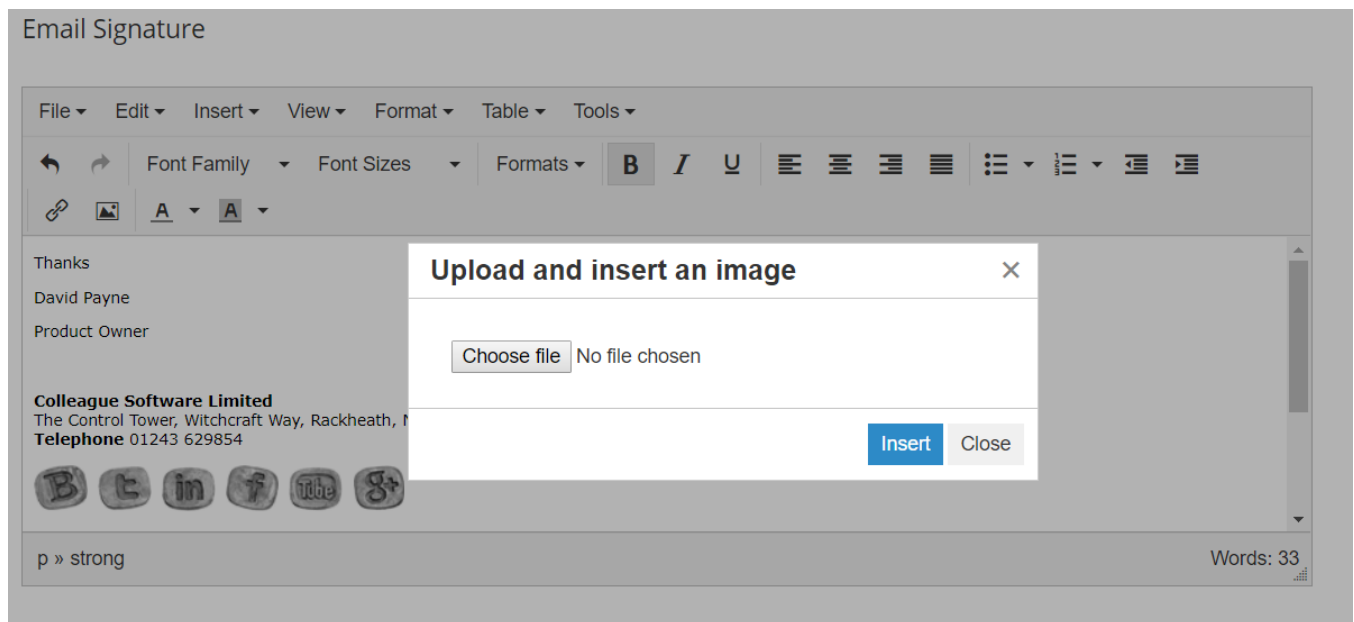
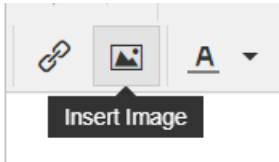
3.4 Implement Embedded Images for Email Signatures

State: Done

Type: Enhancement

User Notes: Users now have the option to insert and embed images within their email signatures (User Settings and Admin/Users). This option is also available when sending an email.

This is via a button on the email toolbar:



Note: Images are limited to 300KB in size to prevent emails with multiple images taking significant time to process/send. Embedded images are not currently available for meeting request emails.

3.5 Introduce Loading Animation when pressing on the GDPR Consent button

State: Done

Type: Enhancement

User Notes: When sending an email and using the 'Request GDPR Consent' button to create a new GDPR link, a loading animation is now shown while the system creates the link.

3.6 Requirements Attachments Auto Lookup

State: Done

Type: Enhancement

User Notes: When sending an email from certain areas on the system, there is now an enhanced list of default options for attaching files to the email. The enhancements are as follows:

- When sending a candidate to a requirement, you can now select attachments related to the requirement, the contact, and the candidate(s) being sent.
 - When sending a candidate speculative CV to multiple contacts, you can now select from a list of the candidate's documents.
 - After creating an interview, if you then choose to send a confirmation email you can select attachments related to the requirement, the contact, and the candidate(s) being sent.
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Revision History

Version	Date	Summary of Changes	Author
1.0	20/03/18	Initial Draft	David Payne