



Release Notes

Build: 18.07.02

Colleague Software Ltd

Date Created: 24/07/18

Colleague 7 Release Notes - 18.07.02

1. Introduction

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

2. About This Release

Sprint Goal: Investigate making email logging, one drive checks, notifications and GDPR updates a background task, instigated outside of the UI. We also plan to work on the 'Mark As Leaver' feature to tie off known concerns and to offer some extra functionality in this area.

3. New Features

3.1 PBI 41707 - Mark As Leaver Fixes and Enhancements

State: Done

Type: Bug

User Notes:

Numerous bug fixes with the 'Mark As Leaver' process on the Contact record.



On opening a Contact that has been marked as a leaver of that company, the user is presented with an alert saying that the Contact has left with a link to the Company that they have moved to and the Contact record at the new Company.

Dave Contact left Colleague Software Limited on 31 Jul 2018 and moved to DP Publications Limited. This Contact record will appear as a leaver from 01 Aug 2018.

[Click here to open the 'Dave Contact at DP Publications Limited' Contact record](#)

[Click here to open the 'DP Publications Limited' Company record](#)

On a Contact record where the Contact moved to that Company, there will now be a field at the bottom of the record with a link to the Contact and Company that they moved from:

Start Date	<input type="text" value="01 Aug 2018"/>
End Date	<input type="text"/>
Type	<input type="text" value=""/>
Previous Contact	 Dave Contact
Previous Company	 Colleague Software Limited

Both fields "Moved To Company" and "Previous Company" are selectable in the respective 'listing options' (Contact, Company Contacts and Contact Search), Searchable in Contact Search and mergeable.

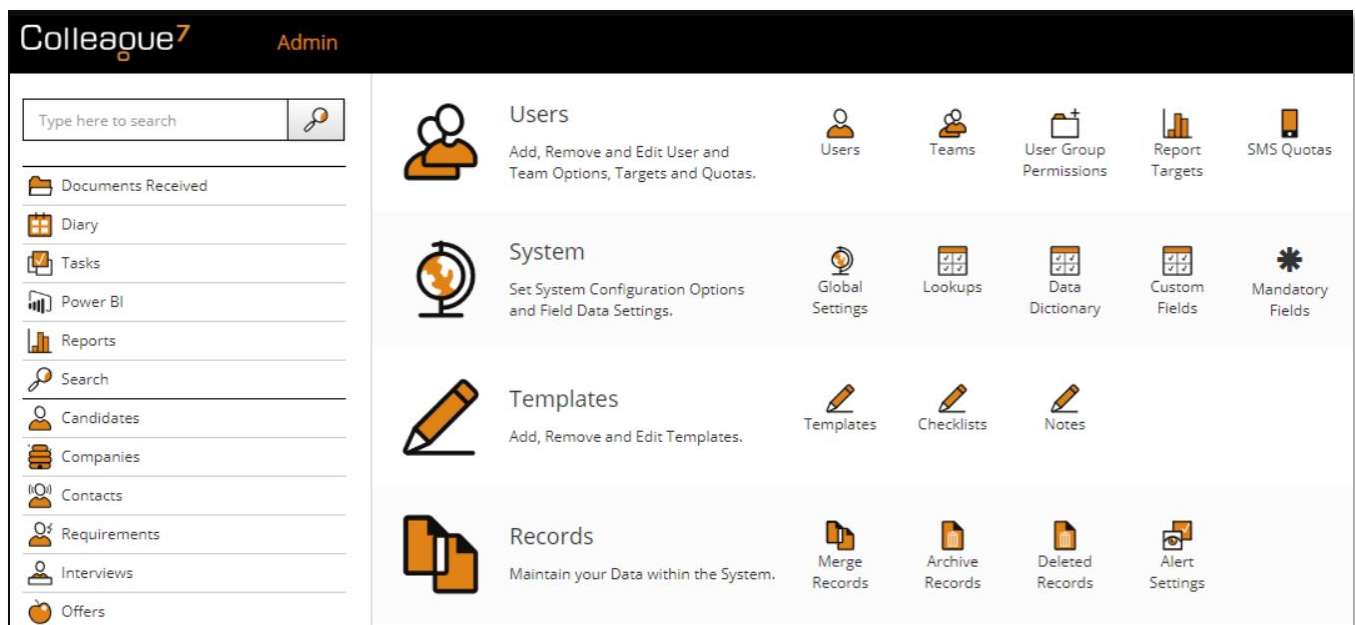
3.2 PBI 35703 – Alert Level Management

State: Done

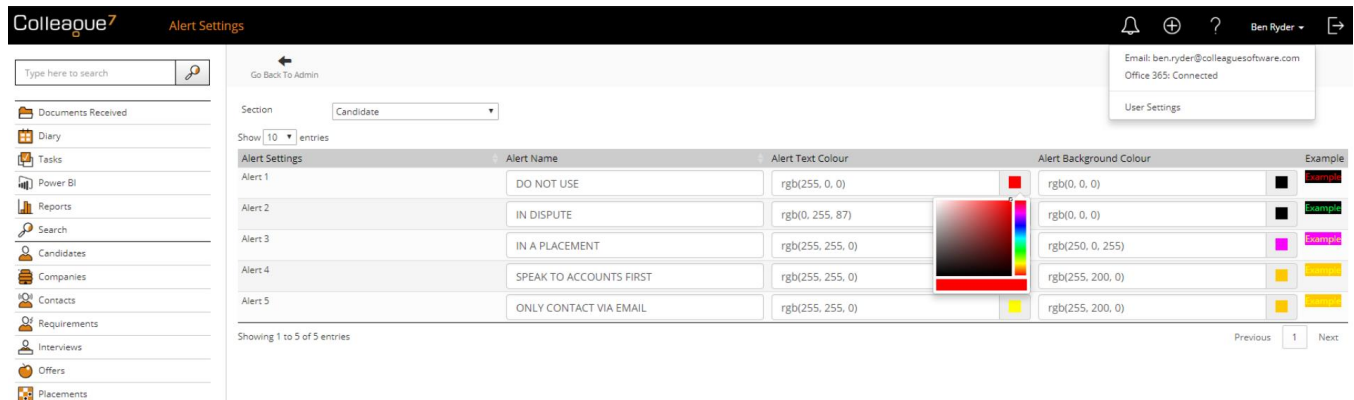
Type: Enhancement

User Notes:

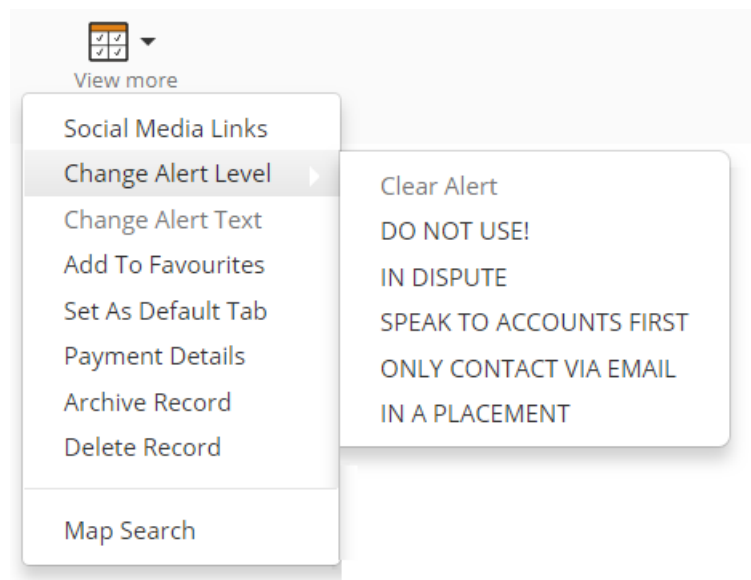
A new page has been added to the system to allow admin users to re-configure system-wide colour and text settings for Candidate, Company and Contact alerts (See 'Records > Alert Settings'):



Admin users are able to configure the default text for the alert as well as the alert text and background colours via a colour picker or RGB colour value:



Updates have been made to ensure the alert options shown on Candidate, Company and Contact records reflect the alert text configured.



A user group permission has been added to allow admin users to configure which user groups can define custom alert text for a specific Candidate, Company and Contact.

3.3 PBI 35703 - Add 'Parse Candidate CV' to Quick Create Menu

State: Done

Type: Enhancement

User Notes: Added 'Parse Candidate CV' to the 'Quick Create' menu. Clicking on this button will navigate the user to the 'CvParser' page. When the user selects a file, the file will be parsed. Clicking on the 'Cancel' button will navigate the user back to the page they came from.

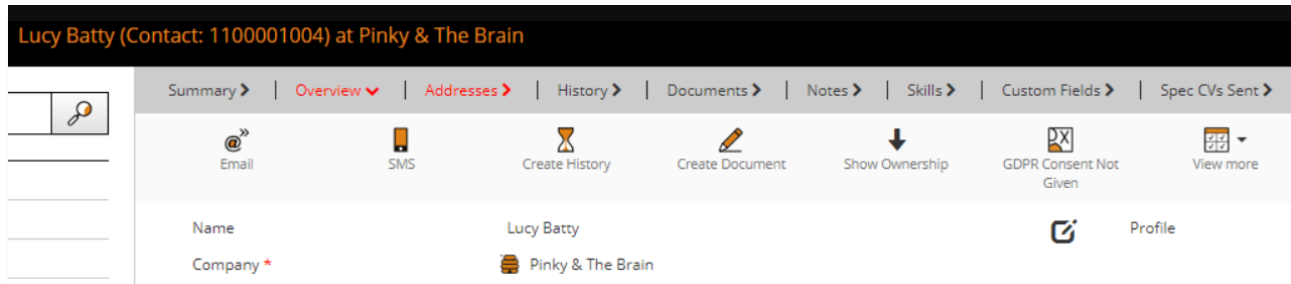
3.4 PBI 46610 - Add Full Name to Candidate, Contact and Company record

State: Done

Type: Enhancement

User Notes:

On Candidate, Company and Contact records, the name of the record now also appears as the first field.



Clicking on the icon on the "Name" row will show the "Update Name" bar, where the user can update the name of the record. This was previously possible via the "Update Name" button part of the "View More" drop down, but this has now been removed.

3.5 PBI 43030 - Entity Selection Page Owned By - Selection Screen Global/Personal Setting

State: Done

Type: Enhancement

User Notes

There is a new Global and Personal Setting in the "System" section. If this Global/Personal setting is set to "Yes", then the user will be allowed to carry out a search on a Selection screen without entering any criteria. When the user does carry out a Selection Search without any criteria, then they will be presented with an alert advising that it will return all records and that it may take some time.

This will return all records and may take some time. Are you sure?

The user can then confirm whether they wish to do this or not.

If the Global/Personal Setting is set to 'No', then they must enter some criteria before being able to search. If no criteria is entered, then an alert will show saying some criteria must be entered.

3.6 PBI 45592 - Employee Count field on company record

State: Done

Type: Enhancement

User Notes: An Employee Count field is now present on Company records

4. Bug Fixes

4.1 PBI 45942 - Can Not Run NOT Skills Search without running AND first

State: Done

Type: Bug

User Notes:

We have enhanced the functionality of the search to allow users to find all records without a given skill (or selection of skills).

This can be done by using the 'NOT' operator at the beginning of a skill search, and then selecting the desired skill(s) to include in the search. Once the skills are selected, the search will return all records which do not have those skill(s).

If multiple skills are selected in the 'NOT' search, they can be separated by either 'AND' or 'OR' operators, but not a mix of both 'AND' and 'OR' together. A warning message will appear if a user attempts to combine the two.

When beginning a skills search using the 'NOT' operator:

- If skills within the 'NOT' search are separated using the AND operator, all records will be returned that do not have all of the specified skills.
- If skills within the 'NOT' search are separated using the OR operator, all records will be returned that do not have any of the specified skills.

Certain restrictions are in place when using the NOT operator at the beginning of a skill search:

- You cannot add parenthesis to the skills search.
 - You cannot search using the 'Skill Description' search mode.
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4.2 PBI 17325 - Help With Parse CV Button Missing (Documents Received Area - Toolbar)

State: Done

Type: Bug

User Notes: Fixed bug where Colleague7 UI layout was being affected by HTML emails within Documents Received.

Revision History

Version	Date	Summary of Changes	Author
1.0	24/07/18	Initial Draft	David Payne