



Release Notes

Build: 18.08.01

Colleague Software Ltd

Date Created: 21/08/18

Colleague 7 Release Notes - 18.08.01

1. Introduction

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

2. About This Release

Sprint Goal: Implement background tasks to manage email logging and one drive checks, whilst reviewing solutions for notifications and GDPR updates. Also start the second phase of a project to deliver a panel which will help offer a summarised overview of record data when working within Search Results.

3. New Features

3.1 Implement the Cloud Service to Process Email Logging and OneDrive Checks

State: Done

Type: Enhancement

User Notes:

The Outlook email logging and One Drive document editing has been moved so that the processing now takes place in a separate Azure service.

This work was done to improve performance for Colleague 7 users, and also to allow our Support and Development teams to be able to quickly identify any potential problems with the service moving forwards.

3.2 Implement Summary View - Basic Fields

State: Done

Type: Enhancement

User Notes:

A Summary View is now available when selecting results after performing a Search.

Forenames	Surname	Owned By	Direct Number	Candidate Type	Candidate Status
Anthony	Morgan			All	Do Not Use
Michael	Wilson			Perm	Do Not Use
James	McTeer			Perm	Do Not Use
"T",	"C" McEvans			All	Do Not Use
Patrick	Clarke			Contract	Do Not Use
David	Payne	David Payne	01243629854	All	Do Not Use
Parsed	Candidate		000	Contract	Do Not Use

Summary View	
Profile	
Name	David Payne
Address Line 3	Vinnetrow Road
Candidate Source	Our Website
Candidate Status	Do Not Use
Country	United Kingdom
Mailshot Status	Allow All
Mobile Number	07777 777777
Telephone Number	01243 777777

When viewing the Search Results and selecting at least one record, an icon will in the main black navigation bar at the top of the screen. Clicking on this icon will display the Summary View.

The fields displayed in the Summary View are determined by those selected in the 'User Settings' or in the 'Admin' area (dependent on the 'Use Default Settings' value in User Settings).

Type here to search

Documents Received
Diary
Tasks
Power BI
Reports
Search
Candidates
Companies
Contacts
Requirements
Interviews
Offers
Placements
Recent Items
Favourites
Admin

User Settings > Email Signature > Summary View

Summary View

Use Default Settings: No
Entity: Candidate

Available Fields

Address Type
Address Line 1
Address Line 2
Address Line 3
Candidate Source
Candidate Status
Candidate Type
City
Country
County
Current Pay
Current Salary
Date Available
Date Of Birth
Direct Fax
Direct Number
Email Address

Options

Add
Remove

Selected Fields

Address Line 3
Candidate Source
Candidate Status
Country
Mailshot Status
Mobile Number
Telephone Number

If multiple records are selected, then navigation buttons will appear at the top of the Summary View, where the user can easily navigate to the next and previous selected records.

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3.3 PBI 37470 - Add 'Mailshot Status' to the CV Parser

State: Done

Type: Enhancement

User Notes: Mailshot Status is now an available field on the CV Parser underneath the Summary tab. This will default to the Mailshot Status defined as Default in the Admin area (or to 'Allow All' if no default is defined).

The Mailshot Status defined in the CV Parser will be taken through to the new Candidate on Register.

3.4 PBI 49690 - Update Partial Views to include lookup by ID

State: Done

Type: Enhancement

User Notes: We have now added the Candidate Id, Company Id and Contact Id to the Candidate, Company and Contact Lookup partial views respectively. This is a system wide update.

4. Bug Fixes

4.1 PBI 41081 - Documents Received Error

State: Done

Type: Bug

User Notes: Fixed bug where a very large email or group of emails would cause an error on the Documents Received page. This is a system wide update in relation to the amount of data that can be held in a string, so improves all areas of the system where tables are used.

4.2 PBI 44277 - Ownership Issue on Creation

State: Done

Type: Bug

User Notes: Ownership for Candidate, Company and Contact records can now be assigned to the current user automatically. This is set via Global Settings against each entity section and also overwritten via matching User Settings.

Candidate Assign the current user as the owner when creating a candidate? Yes

When running the mark as leaver process for a contact, the current user will be assigned as the owner for the new contact or an option is available for 'Copy Ownership'. If 'Copy Ownership' is selected, the current ownership definition for the contact will be copied across to the new contact as part of the process and the current user will not be assigned as an owner.

Mark As Leaver

✓

✗

Save

Cancel

Company *

Please select a Company

Address *

End Date *

Reason *

Copy Notes

Copy Skills

Copy Skills To Company

Copy Mobile Number

Copy Other Number

Copy Ownership

Note: For ownership to be assigned on creating new records, the user must be within a team. Team configuration can be accessed and managed from Admin – Teams.

4.3 PBI 45738 - Parent/Child option to be hidden

State: Done

Type: Bug

User Notes: On the Lookups page in the Admin page, the "Parent" and "Type" options now only appear when either the "Custom Lookups" or the "Skill Categories" section is selected.
On any other section, these two options will be hidden from view.

Revision History

Version	Date	Summary of Changes	Author
1.0	21/08/18	Initial Draft	David Payne