Features added to Troy Vision V3.0.32

Stage Invoicing (Executive Search & Selection Only)

It is now possible within the job page to create stage invoices. These are useful if you raise an invoice at different stages of the job's life-cycle, for example retainers, short list presentation etc.

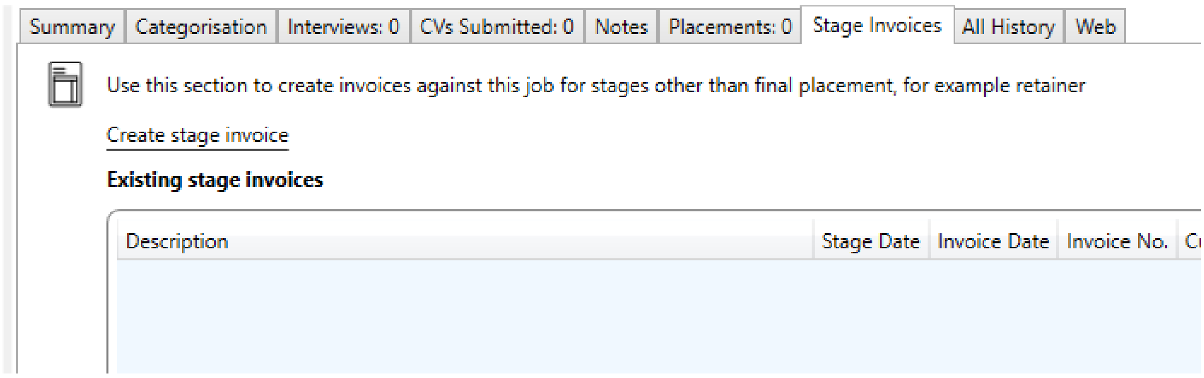

Fig.1, New stage invoices tab within a job

Simply click the *Create Stage Invoice* link to show the window displayed in *figure 2*, which allows the entry of a stage invoice. At the top of the window, select the stage at which the invoice is to be created, then enter the invoice details.

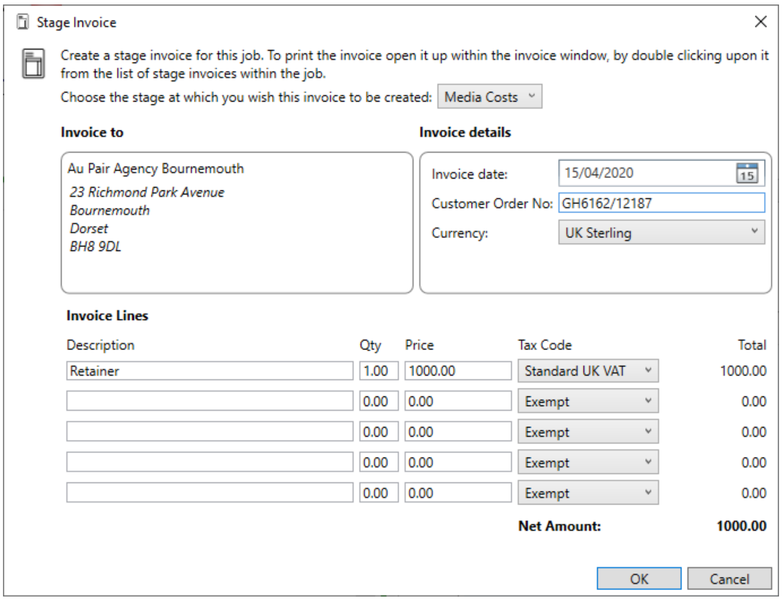

Fig. 2, Stage Invoice creation

Once the invoice has been created it will be listed within the job. If you double click upon the invoice you will be able to print it out, export it to Sage or amend it. Right mouse clicking upon an invoice listed will allow you to create further invoices, view the invoice (same as double clicking) or remove the selected invoice.

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Auto Update (Administrators Only)

From V3.0 build 32.0 Troy will have the facility to update itself. If you are logged in as administrator, once a day Troy will check to see if it is running the most up to date version. If not, a message will be displayed advising you of this. If you then click upon the *check for updates* item within the help menu, the new update will be downloaded and the next time that each user starts Troy they will prompted to update their copy of the programs. Unlike the previous version of Troy, you do not need to log out users in order to perform the update as each user will be updated independently when they restart Troy, and they accept the prompt to update the software.

Please be aware that certain network restrictions may deny Troy access to the service which checks the Troy version, and in this case the auto update will not be possible until the network restrictions are relaxed.

GDPR and People Chart View

A chart view has been introduced within this version which shows the breakdown of candidates / contacts within the database and a GDPR overview showing consent and contact method data.

The people chart view can be found within the *View Options* menu within the main Troy window and when selected shows the window displayed in *figure 3*.

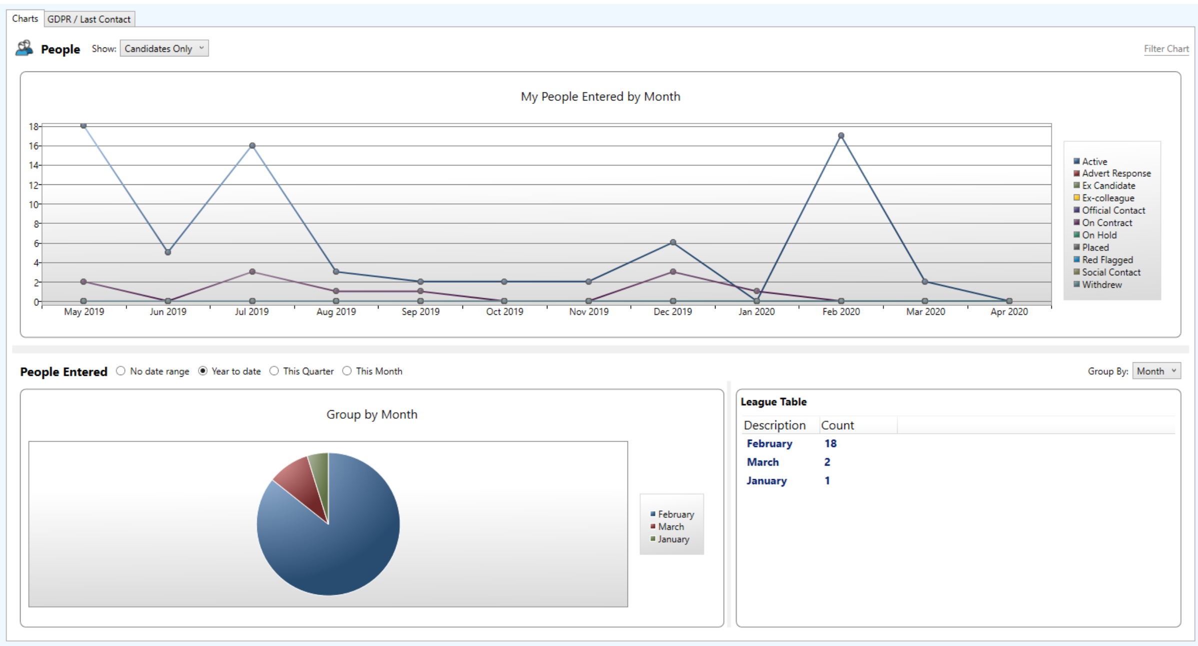

Fig. 3, GDPR and People Chart View

The upper panel of the charts view shows people (candidates only, contacts only or both) entered by month and broken down by their current status. The bottom panel allows you to break down people entered over a particular date range by a range of different data, for example the month they were

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entered, user fields or division / team. Double clicking upon a league table row will load that particular set of data.

Switching to the GDPR tab will show the GDPR breakdown (in the left-hand panel) for people who have been allocated to your consultant, or you can change the view to show all people within your team, division or database. The breakdown shows people who have unsubscribed, various consent information along with the contact methods. If you click upon the underlined number alongside the GDPR data type, the individuals that make up that number will be loaded.

The right-hand panel will show contact information for candidates and contacts broken down by the number of days in which they were last contacted. If you have any custom dates configured, then the break down for these will also be shown. As with the GDPR breakdown, if you click upon an underlined number then the people will be loaded within a separate list. For the figures shown within the custom dates section, simply click upon the number that you wish to see broken down further.

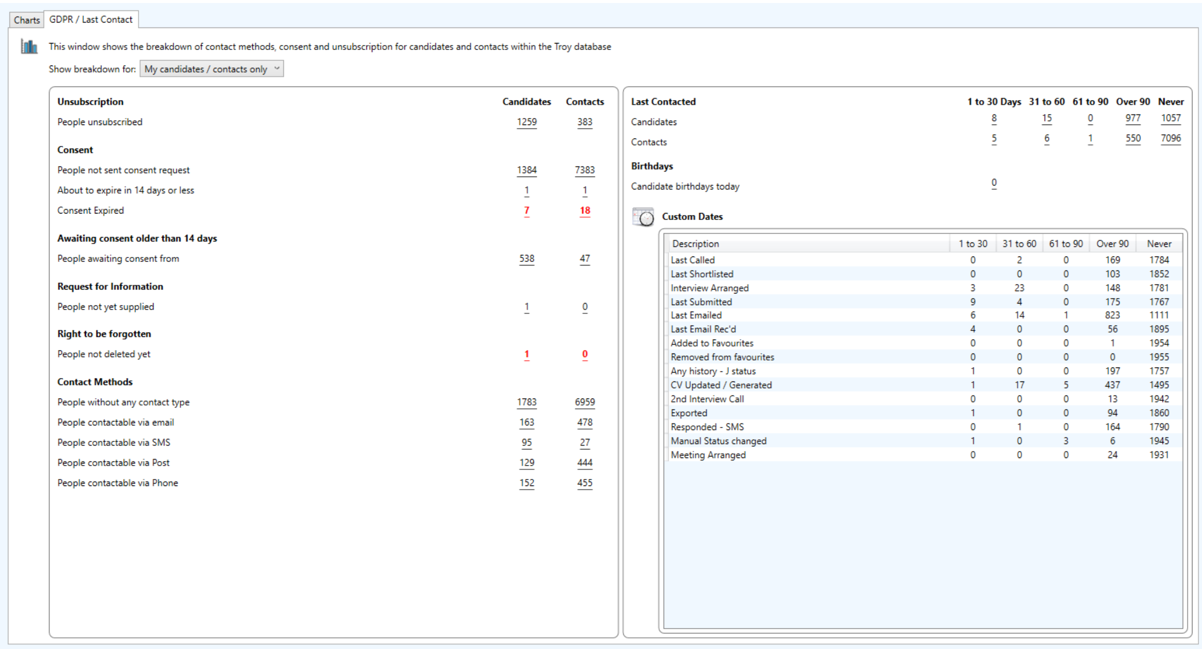

Figure 4, GDPR Breakdown

In addition to GDPR and contact information the number of candidates with a birthday on the current date will be displayed. Clicking on the number will load the list so that a birthday email could be emailed to them if desired.

Interviews and CV submissions

When logging a new CV submittal or interview it is now possible to generate the history item on behalf of another consultant. Doing this, will ensure that the individual's KPI statistics are correct as the interview will be attributed to them and not the consultant logging or sending the CV / interview.

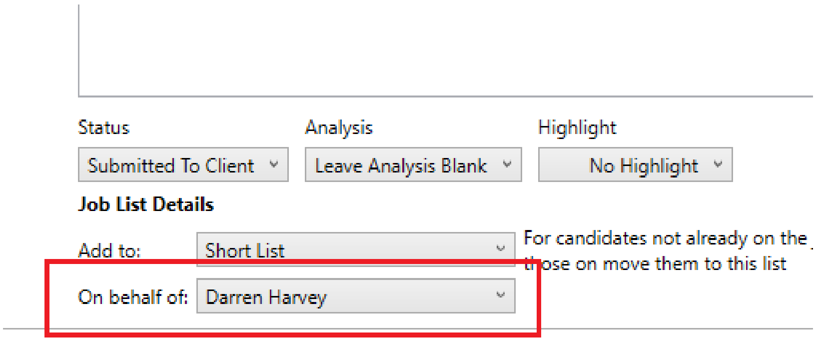

Fig 5, On behalf of drop-box

At the bottom of the window for logging a CV send out or an interview, a new 'on behalf of' option will be available. By default, this will be set to you, but it can be changed to reflect the consultant who you are doing the work on behalf of. Remember, this is the consultant that the action will be reflected within the KPIs.

When sending an interview or CV via an email, the on 'behalf of' box is also visible, see *figure 6.*

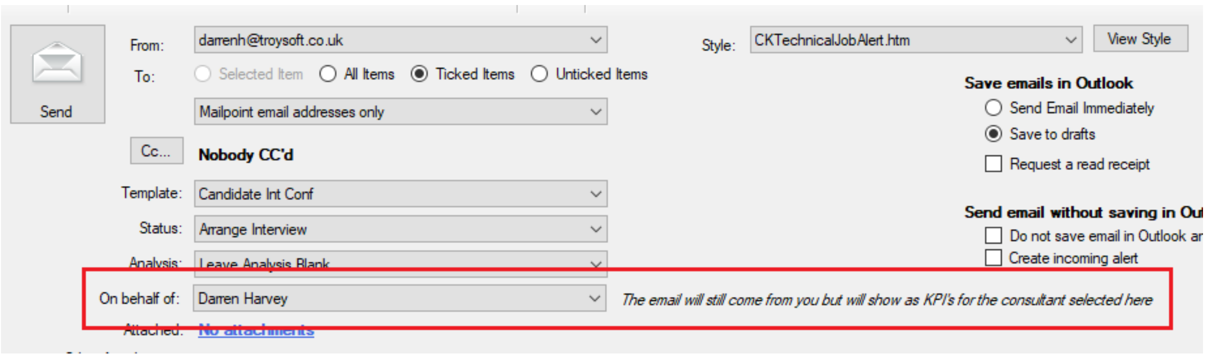

Fig 6, Sending a CV or arranging an interview on behalf of somebody else

Please note: That even though you are sending the email on behalf of somebody else, the email will still use your signature, come from you and appear within your Outlook, it will <u>not</u> appear in the other person's email unless you cc them.

Detail Print Outs

It is now possible within this version to produce detailed print-outs of people, companies, jobs and contracts. You can choose from a number of different styles or export a base XML of the item data.

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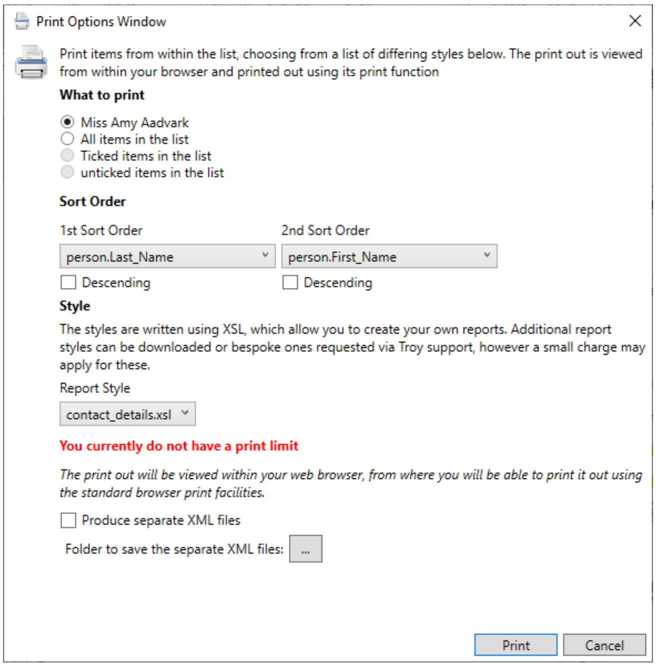

Fig 7, Printing options

Simply tick what items you wish to print, bearing in mind that you may be limited to only printing a certain number of items (shown in red). Choose a sort order, then a style from the drop box, and click the print button. Troy actually produces a HTML document that is visible within your browser, so that you can preview the document before using your browser's print function to print out the report. There are a number of pre-set styles within Troy, however if you wish a specific layout / style to be designed please speak to Troy support. *There may be an additional charge for this service dependent upon the complexity of the report.*

Within this window you also have the option of exporting detailed information about an item and have each item stored within a separate file. If this is the case, tick the box labelled 'Produce separate XML files', and choose a folder into which the files are saved. This feature maybe useful if you wish to archive some data before removing it from the database.

Other

Within the *Alerts and Email* section of the *personal settings* it is now possible to set up a process that will run each day and alert you if any of the date type additional fields are due to expire within *n* (default is 14) days or have already expired. This is useful if you are using additional fields to record visa expiry dates, or various qualification expiry dates. If you double click upon the alert within the alerts section of the main Troy window, then the list of items about to expire will be displayed.

It is now possible to make a call to a company which does not have any contacts associated with it. Simply click upon the *call* icon within the item ribbon menu or press F8. Previously, Troy would insist on a contact being created before the call could be made.

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A link has been added to the release notes web page within the Help menu. From here you can see what new features are contained within the current version, plus any previous release notes and hints and tips.

It is now possible to show the 'TROY' user within the drop-down lists of active users when allocating consultants to items. This is useful if you wish to use this user as a holding bin before allocating the item to its actual consultant, which can be necessary if a consultant has left. By default, this option is *off* but it can be switched on via the User Login maintenance window found within the system settings menu – a check box for this purpose is displayed at the bottom of the window.

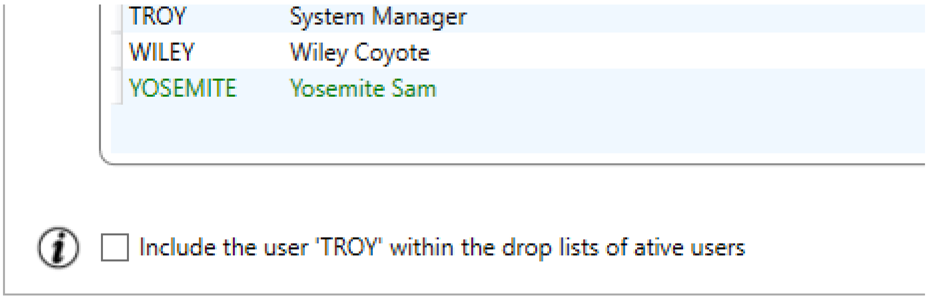

Fig 8 – Include the user 'TROY' within drop lists

New candidate, company and job KPIs can be configured so that the KPI uses the consultant allocated to the item, rather than the consultant who created the item. This is done via the KPI settings icon on the KPI page.

Within the 'Send to / Add to list' option of a candidate / contact, it is now possible to add the person to a public stored list.