

## Features added to Troy Vision V3.0.33

### Importing

It is possible to import two types of data into the Troy Vision database, candidates and company / contacts. You can import from CSV files or from the contacts within Microsoft Outlook.

The import function is located within the main drop menu (top left corner of the main Troy window) and you must be logged in as an administrator to run it.

### Importing from a CSV file

ImportWindow

Import from CSV file | Import from Outlook

Import candidate, company (including contact details) and job data into Troy using a CSV file

**What to import**

Candidates  Companies

**CSV File**

Are columns enclosed within double quotes

Click ... to choose CSV file using delimiter Comma (,) C:\Temp\SalesCandidates.csv

**Files to import** Pick an exiting field mapping: SalesCandidates.xml

Data Preview	Import Into	Data Field
business_name	Employer Name	employ.Name
add1	Address Line One	address.Address_1
add2	Address Line Two	address.Address_2
locality	Address Line Three	address.Address_3
town	Town	address.Town
county	County	address.County
postcode	Postal Code	address.Postcode
postcodearea		
postcodesubarea		
area		
telephone	Phone Number	address.Tel_Number

First row contains column headings

Save the mapping above with the description:  Save

Import

Figure 1 – Importing a CSV file

At the top of the window shown in *fig. 1* choose whether you wish to import candidates or companies (contacts can be included also but it is not mandatory).

Before selecting the CSV file to use, ensure that the correct delimiter which is used to break up the CSV file into columns is selected. This is done by choosing from the 3 options within the delimiter drop box. These are comma (,) – the default, semi-colon (;) and pipe (|). The comma is typically used as the delimiter for English language CSV files whereas the semi-colon is used within

## Features added to Troy Vision V3.0.33

continental Europe. Also, tick the box entitled 'are columns enclosed within double quotes' if the data within the CSV is encapsulated. This means that alphanumeric data is enclosed within double quotes ( " ) typically used if the data contains the delimiter.

Click the '...' button to choose the CSV file, which will then show a preview of the first data row within the large grid in the middle of the window. You will now need to map where each column of data with the CSV is to be stored within Troy. To do this, double click upon a row and choose a field from the resultant window. If you do not wish to import a field, simply leave it blank as shown for 'postcodearea' in the example above.

Once you have mapped the fields, it is possible to save the mapping so that you can use it again if you get another file of the same format. To do this type in a description in the space provided and click the **Save** button. It will then become visible in the drop box above the mapped fields grid, the next time the import window is opened.

Before starting the import of data, tick the box entitled 'first row contains column headings' if the first row of data within the CSV are column headings describing what the data within the file contains. This will stop the column headings being imported.

To start the import, click the **Import** button. A progress message will be displayed along with a cancel button which you can use if you wish to cancel the import. However, any items imported before the cancel button was clicked will still be added to the database.

The import runs in a separate process to Troy, so you can minimise the window and carry on with something else whilst the import runs. Obviously, the time taken for the import depends upon the size of the data being imported.

## Features added to Troy Vision V3.0.33

### Importing from Outlook

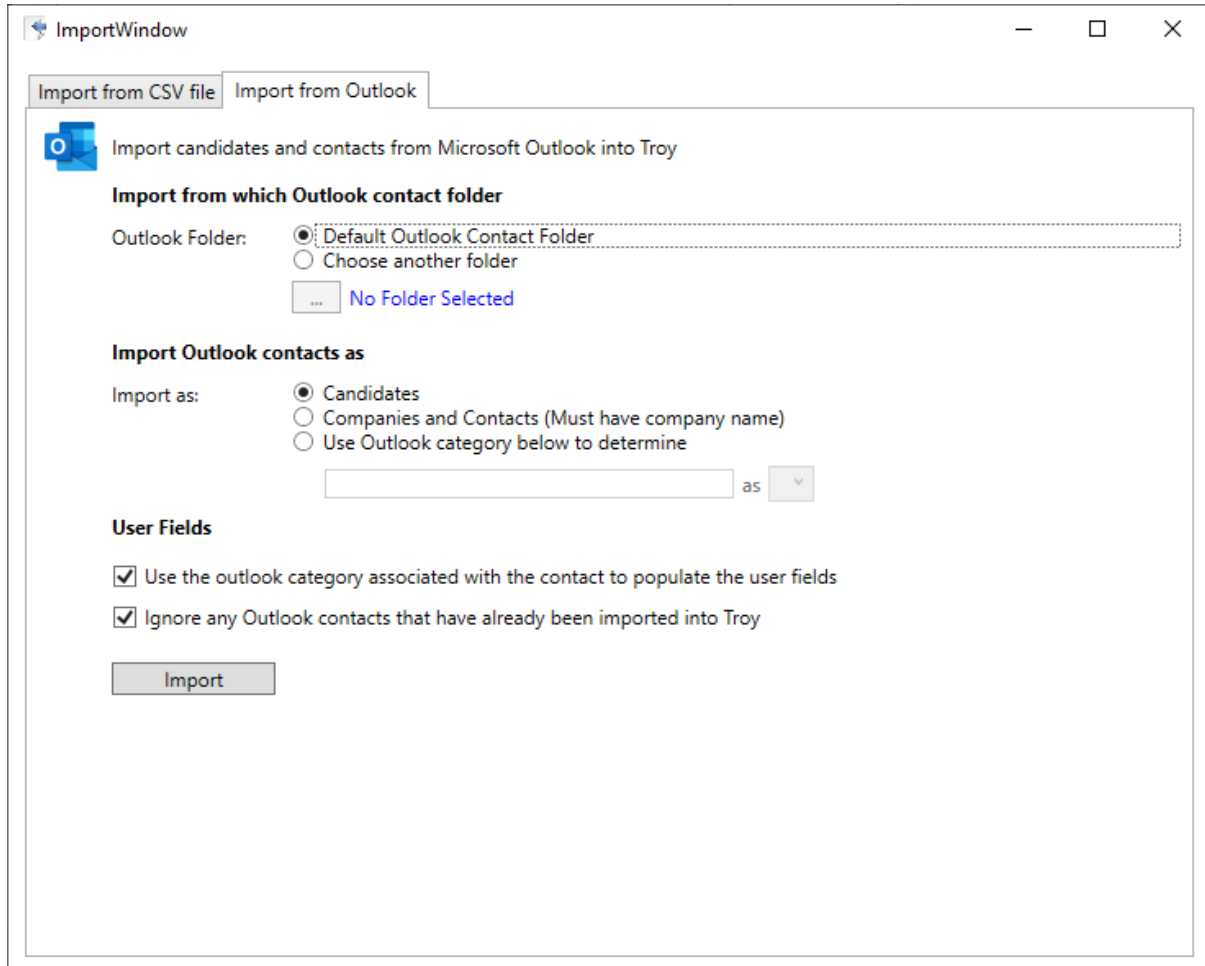


Figure 2, Importing from Outlook

You can import contacts from Outlook from your default Outlook folder or any other folder within the Outlook hierarchy. The default folder option will initially be selected, but if you wish to import contacts from another Outlook folder click the '...' button to pick from your list of folders within Outlook.

Then choose what you wish the Outlook contacts to be imported into Troy as, candidates or company / contacts. If you have both types within the outlook folder, you can differentiate between them by using the categories function within Outlook to identify what they are. Using the 'Outlook Category below to determine' option type in the text that is used to recognise a candidate or company. Troy will then only import Outlook contacts which match that category as the type (Candidate / Company) selected.

## Features added to Troy Vision V3.0.33

You can also use the Outlook Contact category to populate the item user fields by ticking 'Use Outlook Category' check box. When this is ticked, the import will look for any user fields whose description or code match that of the category and allocate the item to it.

When an item is imported from Outlook, Troy will add 'Imported into Troy' into its category. If you tick the 'ignore' check box, any items which have the 'imported into troy' category will be ignored.

Click the **Import** button to import the Outlook contacts and as with the CSV import a progress message will be shown along with a cancel button and you can minimise the window. Once the import has completed, the results will be shown and you will be able to click on the link showing what has been imported, or any duplicates that were encountered.

### Candidate website login credentials

If you are using the TroyNet API to interface with your website to allow candidates to update their details online, it is now possible to edit those credentials within Troy Vision.

A change has been made to the main candidate window which will show an icon if the candidate has registered to update their details online and that function has been enabled. This icon will be shown alongside the contact methods.

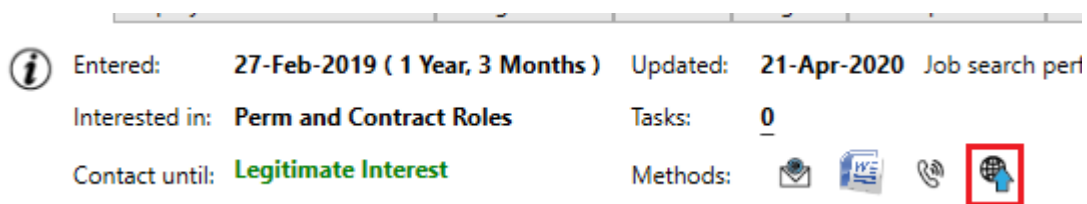


Figure 3, new icon showing website access

If the candidate has registered, but their account has been disabled then the icon will be shown with a red slash across it.

If you wish to change the candidate's login credentials or disable the account then click upon the 'Website Login' icon within the 'Item' ribbon menu which will bring up the window in figure 4.

From this window the candidate's login (if website is not configured to use the candidate's email address) password and memorable information can be changed. You can also update their website reference number, if the website uses a different one to the standard Troy reference.

*Please note, you will only be able to type in information if the tick box to enable the account is ticked.*

## Features added to Troy Vision V3.0.33

**Candidate Web Login Credentials**

The credentials entered here will allow this candidate to login to the corporate website and keep their details up to date

**Website Login Credentials**

Login: amy.aardvark  
*The login above is only to be used if the corporate website does not use the candidate's email address to login*

Password: ●●●

Memorable Info: Not a small country but a ... country  
*This information (which can be left blank) is used by the website as a hint if the user has forgotten their password*

Website Reference: XX27679

Is candidate login enabled

Remove OK Cancel

Figure 4, Candidate Web Login Credentials

If you wish to remove the candidate's credentials simply click the 'Remove' button.

### Job Publishing

When publishing or re-publishing a job to the corporate website, it is now possible to build the job's website URL (which is held within the database) automatically using a set of rules. The URL can be made up of a combination of the job description, reference and Troy ID.

To configure the rules click the 'settings' icon within the Web Manager menu, and from the resultant window click the 'Rules' button at the bottom of the window.

**Job Website URL Rules**

**Job website URL rules**

When a job is published automatically update the website URL held on the job according to a set of rules configured below

Update job with website URL on publishing

Description Separator: URL encoded A separator is used to replace the space within the job description

URL rule for division: Troy Interims

www.troysoft.com/intjobs/[Description]/[Reference]

*Enter the URL above plus any of the merge fields ( [JobId], [Description], [Reference] ) to build the job's URL on the website after it has been published. For example www.troysoft.com/jobs/[Description]*

Apply

Figure 5, Job URL publishing rules

## Features added to Troy Vision V3.0.33

Before using this feature, you will need to speak to your website developers to see if they use a rule in order to determine the URL used to display a job. If no rule is used, then this feature will not be needed.

By default, this feature is switched off, to enable it tick the box at the top of the window and then configure the rules. The separator is used to encode the URL replacing the spaces within the job description with the one chosen. You can configure a separate rule per division, so choose the division and then in the space below enter the URL that you wish to store within Troy each time a job is published. There are three merge fields that you can use to build the URL. Each merge field is encapsulated within square brackets which must be typed into the rule. The merge fields are *[Description]*, *[Reference]* and *[JobId]*. An example of a rule is shown below:

[www.troysoft.com/Jobs/\[Description\]/\[Reference\]](http://www.troysoft.com/Jobs/[Description]/[Reference])

If we published job number 99 with a description of Sales Manager with a separator of hyphen, then the URL recorded against the job would be:

[www.troysoft.com/Jobs/Sales-Manager/99](http://www.troysoft.com/Jobs/Sales-Manager/99)

If the job is re-published with a different description, then the URL will reflect the change.

### Other

When searching on a single word within the candidate/contact quick search include searches on the first and last name. Previously Troy would only search on people who have worked for the single word search term entered.