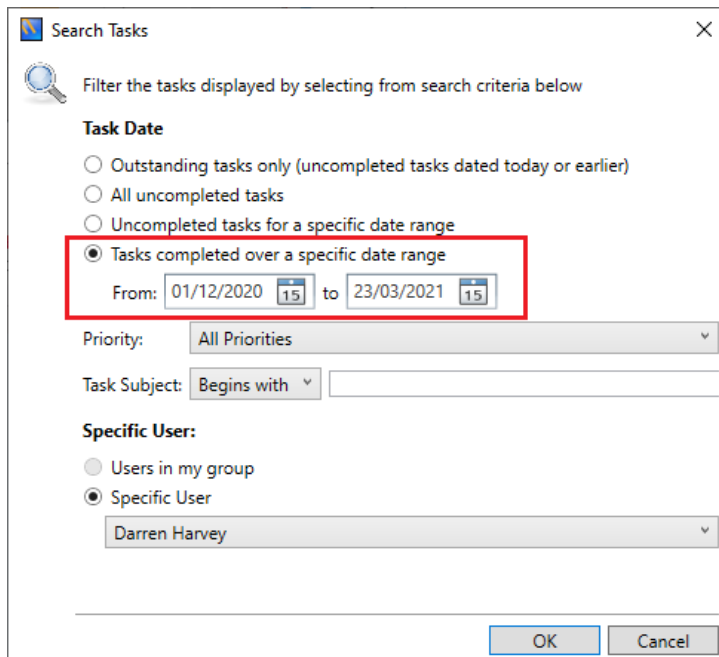


Features added to Troy Vision V3.0.46

Task Manager

It is now possible to search for completed tasks within the task manager and then uncomplete them, changing them back to outstanding. To search for completed tasks, click the search icon which will bring up the window shown in *figure 1*. Simply tick the 'tasks completed over a specific date range' option and enter a date range. Click OK to display the completed tasks.



Search Tasks

Filter the tasks displayed by selecting from search criteria below

Task Date

- Outstanding tasks only (uncompleted tasks dated today or earlier)
- All uncompleted tasks
- Uncompleted tasks for a specific date range
- Tasks completed over a specific date range

From: 01/12/2020 to 23/03/2021

Priority: All Priorities

Task Subject: Begins with

Specific User:

- Users in my group
- Specific User

Darren Harvey

OK Cancel

Figure 1, searching for completed tasks

Once the completed tasks are displayed, simply select a task and click the 'Complete / Uncomplete' menu option. You also have the option to complete multiple tasks by selected ticked, unticked or all tasks. Once a task has been uncompleted, it will again show in your list of active / outstanding tasks.

Features added to Troy Vision V3.0.46

Bulk diarised notes and tasks

It is now possible to create multiple diarised notes and / or tasks for candidate/contacts or companies. Simply create a list of people or companies and then click upon the new **Tasks** menu item, *figure 2*.

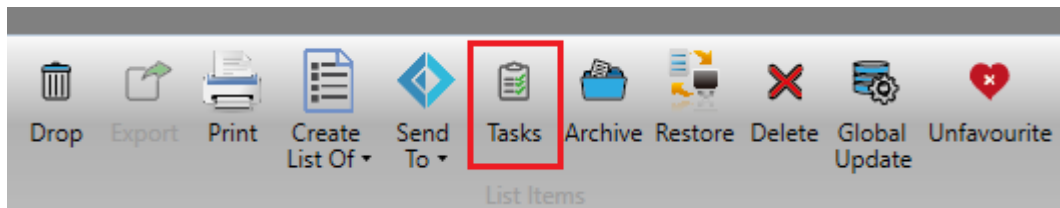


Figure 2, new Tasks menu item

The diarised note window (*figure 3*) will now be displayed with the option at the bottom of the window to create the note and / or task for items in the list. If you wish to create just tasks for the items, then leave the note summary blank and vice-versa if you wish just to create diarised notes.

When tasks are created, the name of the person or company is appended to the task summary, and if a reminder time is chosen, each task's time will be incremented by five minutes so that they do not clash.

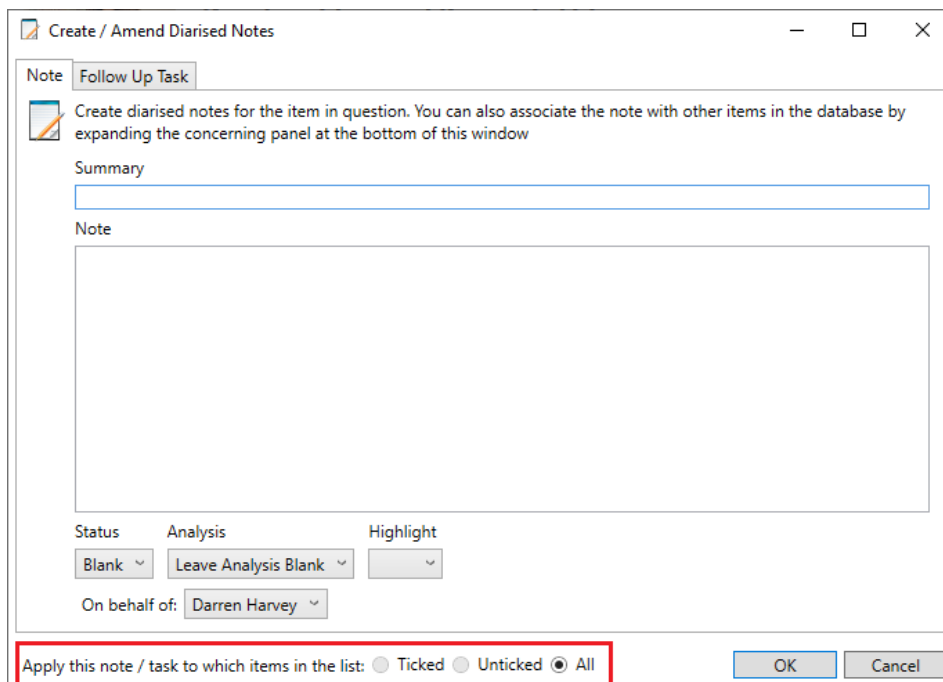


Figure 3, diarised notes / tasks bulk entry window

Features added to Troy Vision V3.0.46

Please be aware that the diarised notes if created in error cannot be removed in bulk, they will have to be removed individually.

Submitting CVs

It is now possible when submitting CVs to a job using an email template to submit the CVs in PDF format. A new configuration controls this feature, with the default setting being off. The configuration can be found within the CV Template settings window (*figure 4*).

autocv11	Canididate Interview Sheet
autocv12	Green Frog CV
autocv13	Big Frog CV
autocv14	Klingon Language

CV Submittals / Sendouts

When submitting CV's using an email template send a copy

Send as PDF (when sending a copy only)

Figure 4, sending CVs as a PDF

This feature is only available if when sending CVs, a copy is sent.

Features added to Troy Vision V3.0.46

Emailing a merged document

It is now possible when emailing a merged document to email it in PDF format. A new button within the history properties window *figure 5*, performs this feature.

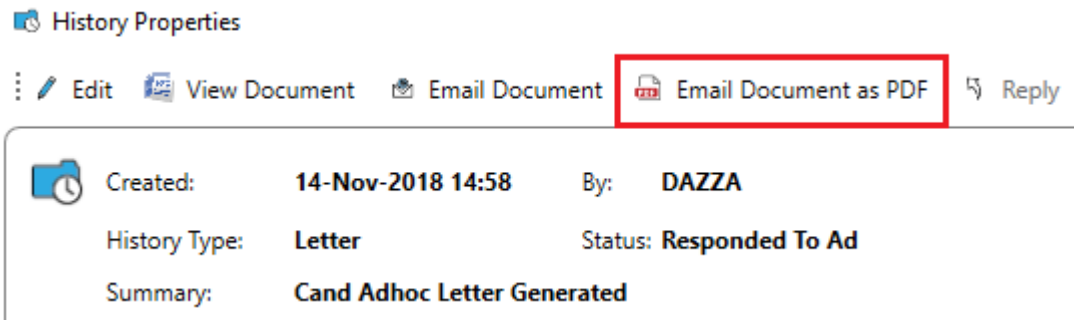


Figure 5, History Properties window

History Archiving

The ability to archive history items has been introduced within this release. This feature will archive specific or all history events before a chosen date. Once a history event has been archived it can be restored from within the person, company, job or contract that it corresponds to. *Please note, you cannot restore all archived history items.*

The archiving can only be carried out by an administrator.

This feature should only be used if Troy is running slowly when showing the at-a-glance view or analysing the KPI information. If Troy performance is acceptable, then you do not need to use history archiving. Please seek advice from Troy support before running this feature.

The history archive can be found within Troy's main drop-down menu (top left-hand corner) and when clicked, the window shown in *figure 6* will be displayed.

There are three archive modes

1. Do not archive history items
2. Manually archive history items
3. Automatically archive history items

By default, Option 1 is selected. It is recommended that if you are to use history archiving that it is done manually, as the process can take a long time to complete.

The next option is to choose how far back you wish to archive. You can choose between 1 to 12 years.

Features added to Troy Vision V3.0.46

The archiving can be configured so that only certain history types are archived. For example, you may want to archive just speculative send outs. To do this, select the 'selected history events' option and then click the **Add** button to add a history type along with a status. Doing this will enable you to target certain history events to archive. If you don't care about which history event is to be archived, select the 'all history events' option. *Please note, history events which have been highlighted to appear in the Important Information area of people, companies etc. will never get archived.*

If you are happy to delete history events rather than archiving them, then click the **Remove** button after performing an archive.

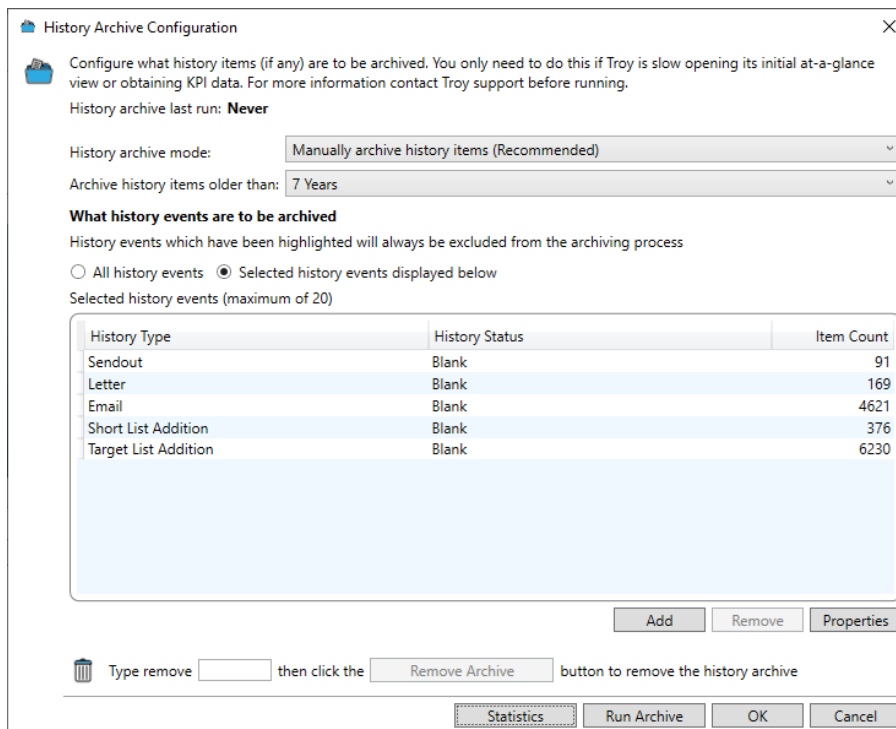


Figure 6 History Archive Configuration

If you want to see how many history items will be archived, click the **Statistics** button and the item count will be displayed alongside the history type if selected types are to be archived, or if all items are to be archived then a message will pop up with the result.

To run the archiving process, click the **Run Archive** button. The window shown in *figure 7* will now be displayed. To save the settings click the **Ok** button.

Features added to Troy Vision V3.0.46

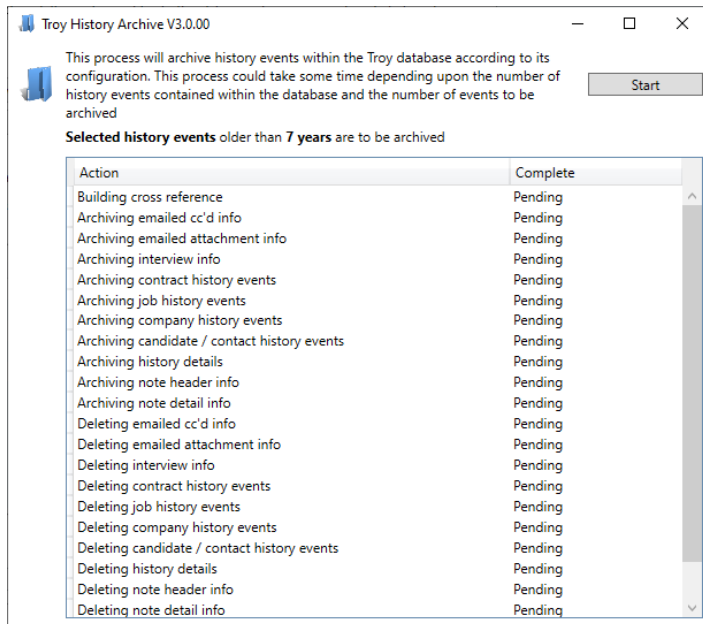


Figure 7, History Archive window

Click the **Start** button to start the archiving process. The archiving is a separate application to Troy and can be minimised and left running even when you have logged out of Troy. Because the process is quite intensive, it is recommended that you leave it running over night, so that it does not slow down the normal operation of Troy when it is running.

Restoring history from the archive

As mentioned earlier, you can only restore history items that are associated with a single person, company, job or contract at a time. There is no way to restore all the history events previously archived.

If you see the icon highlighted in *figure 8* when viewing the history for an item, this means that archived history events exist. To restore the history events, simply click the icon, enter the word 'restore' in the window that is displayed and click the **Restore** button. All of the archived history for this item will be restored. Once the restoration has completed, the now unarchived history events will be displayed.

Features added to Troy Vision V3.0.46

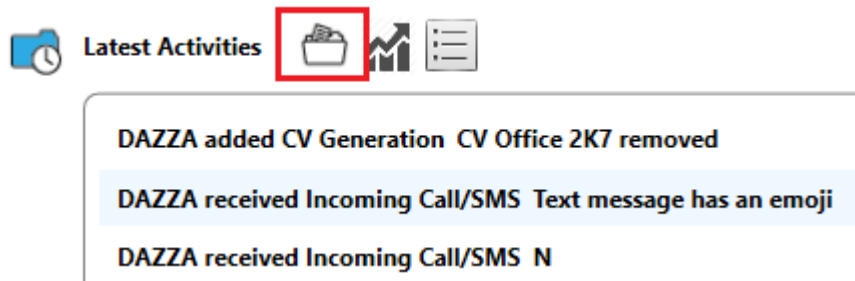


Figure 8, Item has archived history items

Message Centre

An enhancement has been made to the message centre which will allow you to store emails which are not recognised by the automatic storing of emails into the database. *Figure 9*, shows the new *Store Emails* tab which will facilitate this process

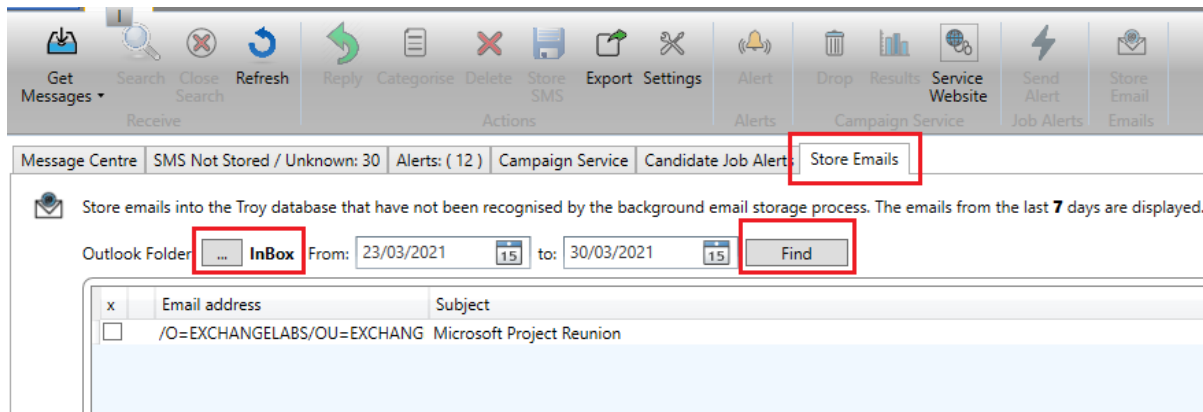


Figure 9, Storing unrecognised emails within the message centre

You can choose from any folder within Outlook and select a range of dates in order to find the emails that you wish to store. Emails that have already been stored into the database (Outlook category will be set to 'imported into Troy') will not be shown.

Initially emails from the last 7 days contained within your inbox will be displayed. The right most column of the email display entitled 'Suggested' will display the candidate / contact name if the email address is stored within Troy. Typically, this column will be blank as the automatic email store within Troy will already have stored emails that it recognises, however if this feature is switched off then recognised emails will appear within this list with a suggested individual.

Features added to Troy Vision V3.0.46

To store an email simply select it, then either click **Store Email** from the ribbon menu or from the right mouse click menu. If multiple emails are to be stored in one go, tick the emails and then click the store email option.

Store Email(s)

Store the email or emails against the selected candidate / contact

Store the email(s) against

Selected candidate / contact below The suggested candidates and contacts

Selected candidate / contact: ... Nobody selected

Status Analysis Highlight

Logged Leave Analysis Blank No Highlight

Associated With

Attachments

If email has attachments Store against the candidate/contact Store with the history event

Emails to store

Selected email Ticked Emails

View the candidate / contacts details once email is saved

OK Cancel

Figure 10, storing an email

You have the option to store the email(s) against a selected candidate / contact, which you pick using the '...' button or to use the suggested candidates and contacts. Then pick the relevant history status, analysis and highlighting if required and pick any other items that you wish to associate the stored email(s) with.

If the email has attachments you can choose whether to store them against the history event or against the individual. Please note, images are not treated as attachments as these make up the signature of the email.

The last option is to choose which selected emails to store. If you had previously ticked emails, then this option will already be selected. Tick the box to view the candidate / contact if you wish to drill down to the individual's page, then click the **OK** button to store the email(s).

When the email(s) have been stored, they will be removed from the list of emails to store.

Features added to Troy Vision V3.0.46

Other

It is now not possible to configure the Inbox as the folder which Troy interrogates for CVs within the message centre.

The calendar view now allows administrators and team leaders to view the calendar for teams other than their own.

Date Next and Date Last Contact fields have been added to the list of fields that can be included within an import.

'All Consultants' added to the list of items to filter by within the KPI view.

Drop item introduced into the right mouse click menu for people, companies, jobs and contracts.

The job view (details or content) within a company page is now remembered.

When a consultant is changed on a job, a history event is now created recording the old and new consultant.

Web manager is now able to filter jobs based upon teams if the user is a team leader or an administrator. A new column has been added to the display to show the job consultant alongside the website consultant, which can be different.

A new option within the people section of the personal settings window now controls whether call notes or diarised notes about a candidate update the comments section of the job list. This will only occur if the candidate has drilled down into from the job, or the call event has been made from within the candidate list.