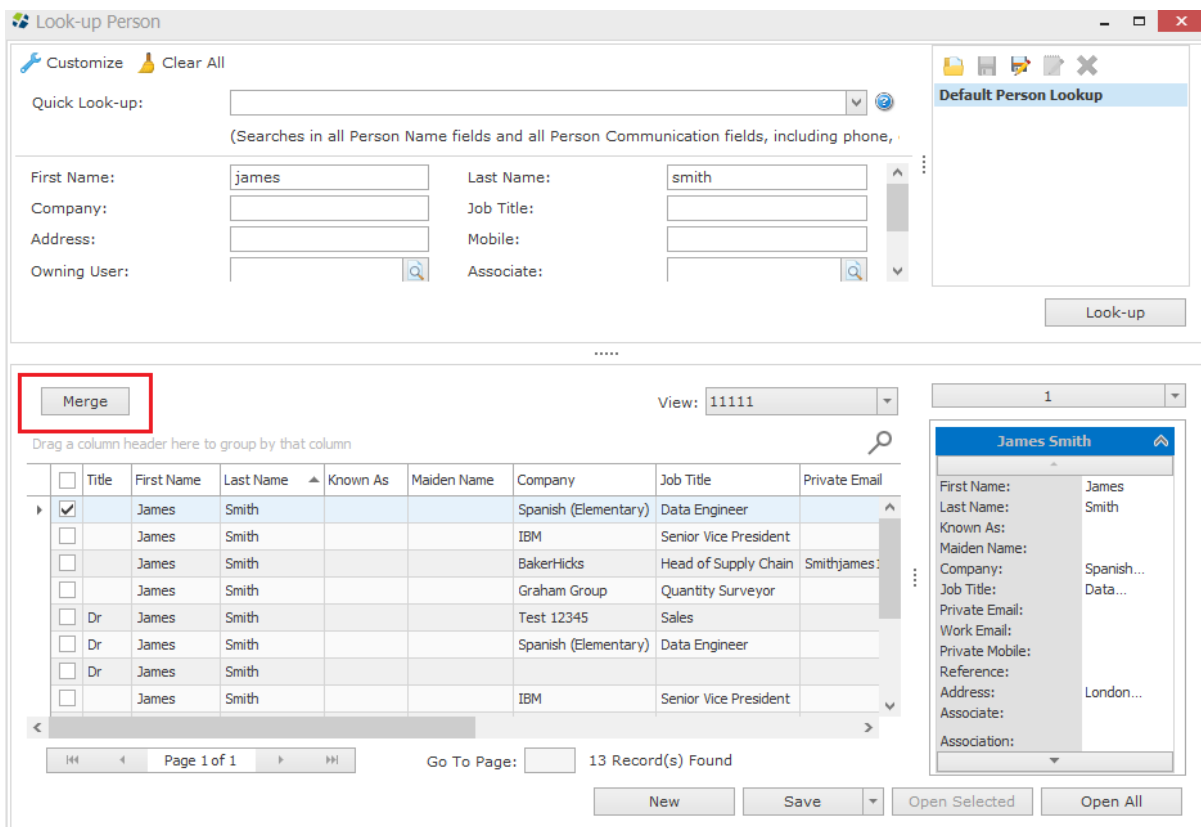

Release Overview – FileFinder 11.43

Here's a snapshot of what we've delivered in this release:

- "Merge" records option added on all People and Company Look-up and Add New screens
- Individual Logs can now be deleted
- Added option for unregistered companies in spreadsheet Import (Bulk Import)
- Users can now copy a single person to multiple lists
- Document Category can now be set when logging an email from Outlook
- Relationship link on a Person record will appear in bold if an active relationship exists
- Work Record "Employment Type" field is now added as searchable field in Person Search
- "Person Title" field added in Person Search
- "Biography" field added as a mappable field in Bulk Import
- Assignment Type column added to Assignment lists
- Ability to turn off auto generation of Invoice reference numbers
- "Paid On" date added to Assignment Invoices infobox
- FileFinder Browser Email templates are now accessible from the FF O365 app
- Fixed an issue with CV parsing not pulling Person qualifications correctly from a Resume/CV
- Fixed an issue with creating a new person with Quick Import from Add New would close FileFinder

New Functionality/Features and Enhancements

- **"Merge" records option added on all People and Company Look-up and Add New screens**
 - This will allow users to merge People and Company records directly from the Lookup and Add New screens
 - Enables users to merge any duplicate records they find without having to open the results list
 - The "Merge" option uses the same existing "Merge records" permission in Admin, if the user does not have the permission set to "Yes" then the Merge button will not show
 - **Lookup**



The screenshot shows the 'Look-up Person' application window. At the top, there is a search form with fields for First Name (james), Last Name (smith), Company, Address, Owing User, Job Title, Mobile, and Associate. A 'Look-up' button is located at the bottom right of the search form. Below the search form is a table of search results. A 'Merge' button is highlighted with a red box in the top left corner of the results area. The table has columns for Title, First Name, Last Name, Known As, Maiden Name, Company, Job Title, and Private Email. The first row is selected. To the right of the table is a detailed view of the selected record for James Smith, showing fields like First Name, Last Name, Known As, Maiden Name, Company, Job Title, Private Email, Work Email, Private Mobile, Reference, Address, Associate, and Association.

Title	First Name	Last Name	Known As	Maiden Name	Company	Job Title	Private Email
<input checked="" type="checkbox"/>	James	Smith			Spanish (Elementary)	Data Engineer	
<input type="checkbox"/>	James	Smith			IBM	Senior Vice President	
<input type="checkbox"/>	James	Smith			Baker-Hicks	Head of Supply Chain	Smithjames:
<input type="checkbox"/>	James	Smith			Graham Group	Quantity Surveyor	
<input type="checkbox"/>	Dr James	Smith			Test 12345	Sales	
<input type="checkbox"/>	Dr James	Smith			Spanish (Elementary)	Data Engineer	
<input type="checkbox"/>	Dr James	Smith					
<input type="checkbox"/>	James	Smith			IBM	Senior Vice President	

▪ **Add New**

Search / Add Person

Search / Add Person

The following possible matches have been found. Please select one of the matching records and press finish or press new to create a new record.

Merge

Drag a column header here to group by that column

<input type="checkbox"/>	First Name	Last Name	Known As	Maiden Name	Company	Job Title	Private Email	Work Email	Private Mobile	Reference
<input checked="" type="checkbox"/>	John	Smith								
<input type="checkbox"/>	John	Smith			Test	QA	test@dillistone.com		1111	
<input type="checkbox"/>	John	Smith								
<input type="checkbox"/>	John	Smith			SSE Contracting	Commercial Manager		John.Smith@sse.com		
<input type="checkbox"/>	John	Smith			DS Ltd	Sales	test@ds.com	work@ds.com	11111	
<input type="checkbox"/>	John	Smith			Willmott Dixon	Pre Construction Manager		john.smith@willmott Dixon.co.uk		
<input type="checkbox"/>	John	Smith			Lots	CEO				
<input type="checkbox"/>	John	Smith			Lots	CEO				
<input type="checkbox"/>	John	Smith			Google	IT	test@ds.com		1111	
<input type="checkbox"/>	John	Smith			Lots	CEO				
<input type="checkbox"/>	John	Smith			www.housewifestuff.com	[No Job Title Found]				

Page 1 of 1 Go To Page: 11 Record(s) Found

New

Finish Cancel

Merge Persons

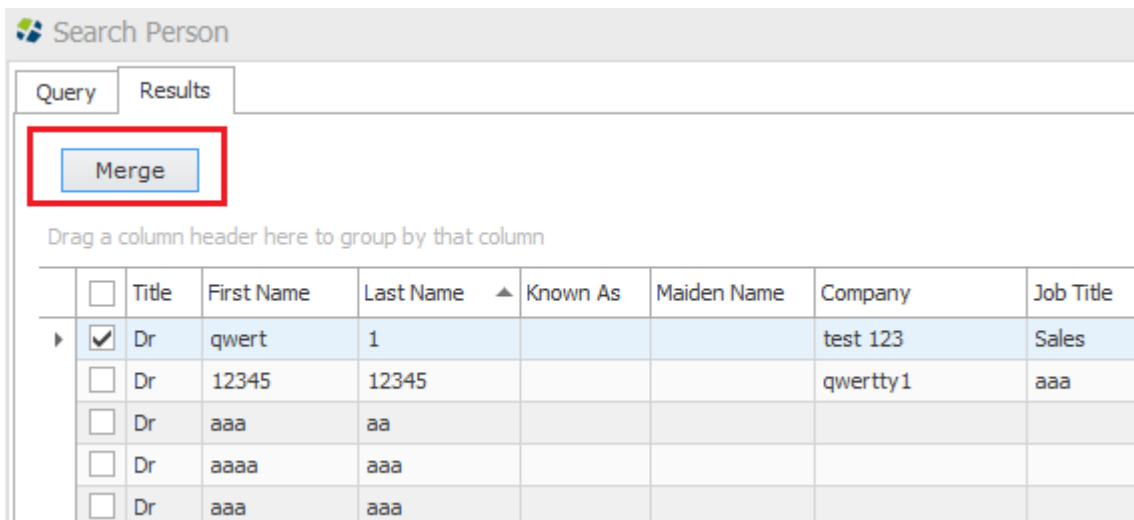
Merge Persons

Save Save & Close Cancel

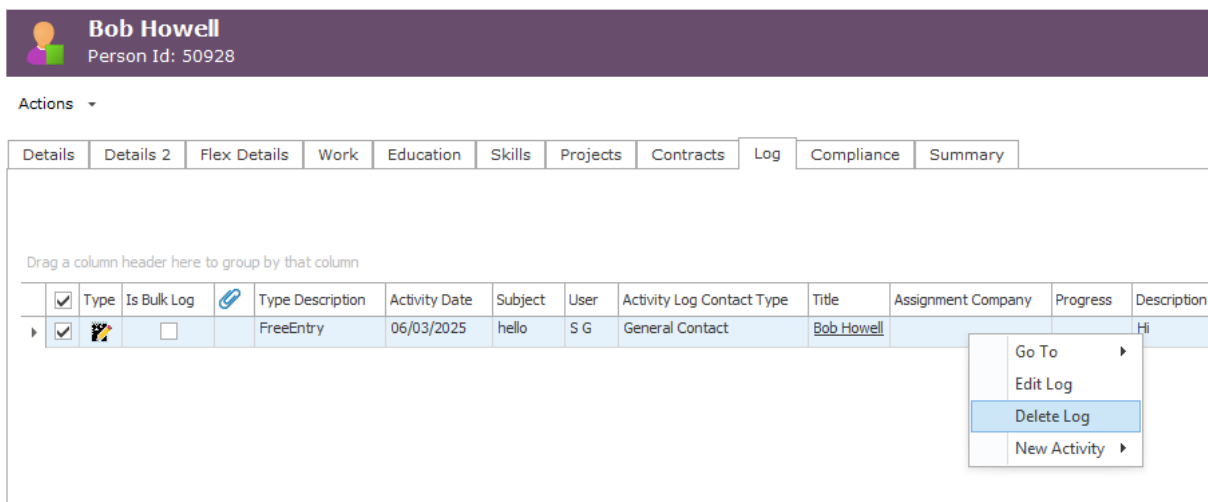
Item

	Main Record	Duplicate Record
Person Id	49361	50694
First Name	John	John
Middle Name		
Last Name	Smith	Smith
Initials		
Reference		
Nationality:		
Date of Birth:		
Processing Reason	Consent	
Processing Status	Refusal By Expiry	
Postal Address (s)		
Electronic Addresses		
Home		22222
Direct Line		
Private		test@dillistone.com
Work		
Private		1111
URL		
Note	John has no known current employment.	John is currently QA at Test and has worked there for


- In FileFinder Desktop the merge option has also been added for People and Company search results list



- **Ability to delete individual Logs**
 - Users can now delete individual logs in FileFinder
 - The Delete Log option is available on the Log tab of a module by right clicking the log to be deleted
 - Tasks and Appointments logs cannot be deleted and deleted logs cannot be retrieved again by users once deleted in FileFinder



- If a log is associated with multiple people a warning will show allowing you to delete for the individual only or all associated individuals

 **Warning**

The log you have selected for deletion is associated with multiple people.

Click YES to delete the log for all associated individuals.

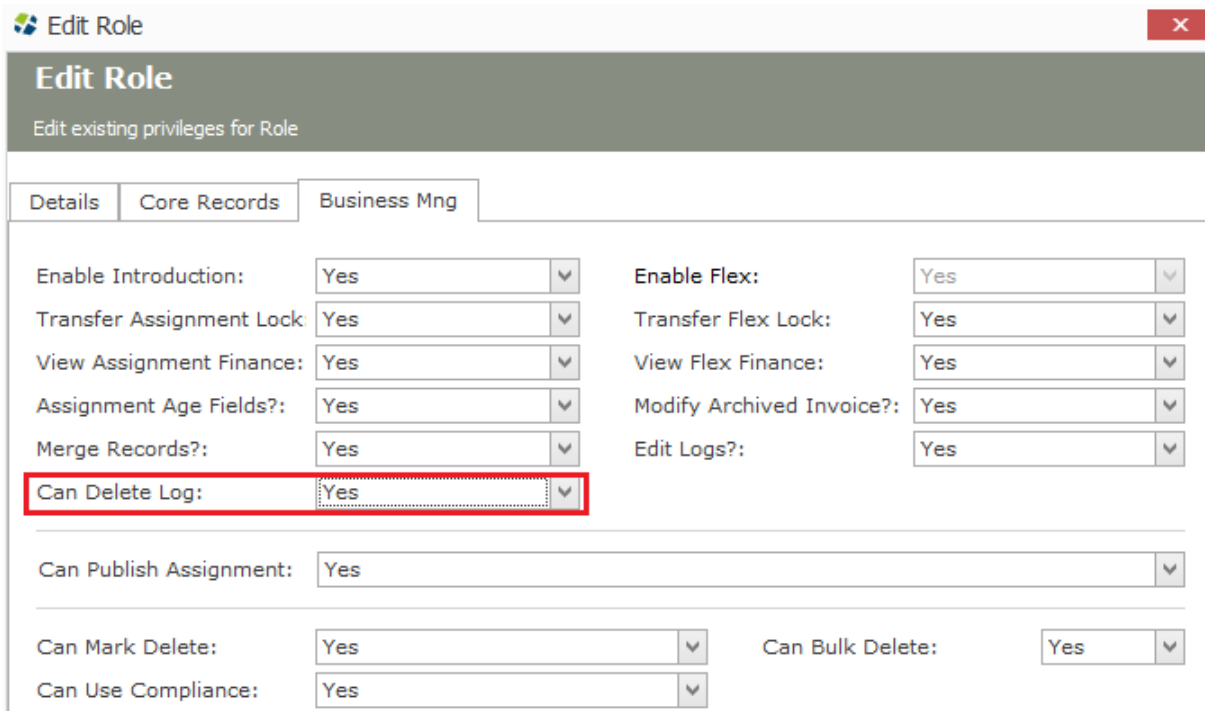
Click NO to disassociate the log and delete it for this individual only.

Yes

No

Cancel

- **A new "Can Delete Log" permission has been added to Role Manager in Admin. This allows users to delete logs in FileFinder. By default, this permission is set to "Off" so logs cannot be deleted**



Edit Role
Edit existing privileges for Role

Details | Core Records | Business Mng

Enable Introduction:	Yes	Enable Flex:	Yes
Transfer Assignment Lock:	Yes	Transfer Flex Lock:	Yes
View Assignment Finance:	Yes	View Flex Finance:	Yes
Assignment Age Fields?:	Yes	Modify Archived Invoice?:	Yes
Merge Records?:	Yes	Edit Logs?:	Yes
Can Delete Log:	Yes		

Can Publish Assignment: Yes

Can Mark Delete:	Yes	Can Bulk Delete:	Yes
Can Use Compliance:	Yes		

- **Added option for unregistered companies in spreadsheet Import (Bulk Import)**
 - Users can now add unregistered companies in spreadsheet (CSV) import
 - Unregistered companies allow users to not create duplicate company records in the database
 - This applies when importing Person and Company records together on a single spreadsheet

Quick Import x

Bulk Import

Click Process button to start quick import

Add Work History

Do not create employment company records (unregistered companies)

Create company records

Click Process to Begin...

- **Note: The "RESGISTERED_COMPANY_ONLY" key needs to be set to off in FF Admin Application Configuration settings for this option to show**

Application Configuration Manager

Application Configuration

Select Value column in order to edit Application Configuration settings.

Configuration Key	Value
MEDIA_TAB_ENABLED	<input checked="" type="checkbox"/>
MIN_CUSTOM_LOOKUP_SIZE	10
MOBILE_RESULT_PAGE_SIZE	10
NUMBER_OF_PREVIOUS_PASSWORDS	7
OUTLOOK_RESULT_PAGE_SIZE	50
PASSWORD_VALID_FOR_DAYS	30
PASSWORD_WARNING_PERIOD	7
PREFIX_SUBJECT_FOR_APPOINTMENT	FF Appt
PREFIX_SUBJECT_FOR_TASK	FF Task
QUICK_IMPORT_MAX	5
REGISTERED_COMPANY_ONLY	<input type="checkbox"/>
RENEWAL_REMINDER_DAYS	30
RESULT_PAGE_SIZE	250
SHOW_PERSON_PRIVATE_FIELDS	<input checked="" type="checkbox"/>

60 Record(s) Found

REGISTERED_COMPANY_ONLY
Specifies whether to allow only Registered Companies.

Buttons: Publish, Help, OK, Cancel

- **Users can now copy a single person to multiple lists**
 - Users can highlight multiple lists from the Move Person screen and the person will be added to all lists selected at the same time

Actions ▾

Drag a column header here to group by

<input type="checkbox"/>				First Name
<input type="checkbox"/>	✓	✓		Abubakar
<input checked="" type="checkbox"/>				Abhinav
<input type="checkbox"/>				Abby
<input type="checkbox"/>		✓		Abdirisak
<input type="checkbox"/>				Abby
<input type="checkbox"/>				Abdul
<input type="checkbox"/>	✓			Abigail
<input type="checkbox"/>				Abdul
<input type="checkbox"/>	✓			Abi
<input type="checkbox"/>				Abimbola
<input type="checkbox"/>				Abby
<input type="checkbox"/>	✓			Abbie

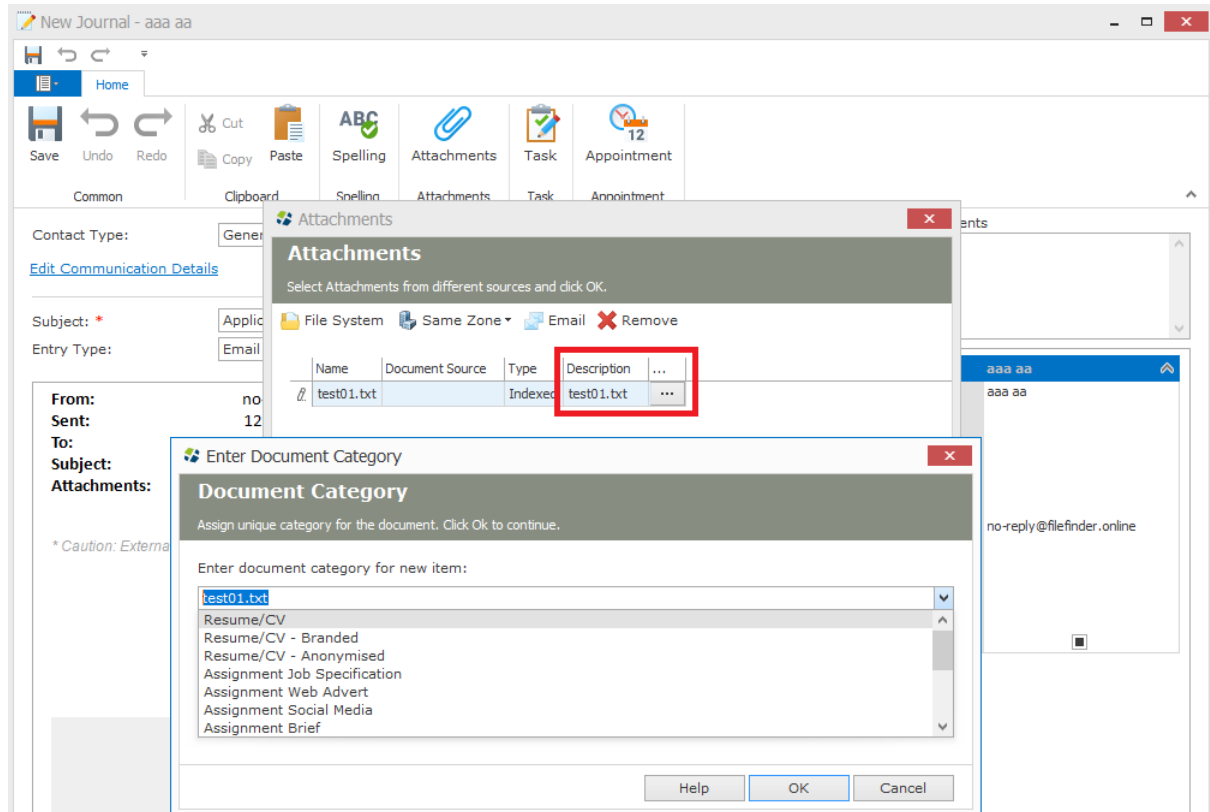
Move Person

Move Person

To another List

Module	Name ▲	Description	Created On	Owning User
People	737		23/09/2021	S G
People	aaa		05/10/2021	S G
People	qffdq	dfgg dffdg	30/05/2024	S G
People	GS		12/09/2023	S G
People	My2		01/07/2021	S G
People	new1		15/09/2021	S G
People	NewList1		14/01/2025	S G
People	NewList2		14/01/2025	S G
People	test		26/07/2024	S G
People	test		03/07/2024	S G

- **Document Category can now be set when logging an email from Outlook**
 - When using "Log email in FF" from the Outlook Add-in you can set the Document Category for any incoming attachments. Previously, it was set to the document name by default and could not be changed



- **Relationship link on a Person record will appear in bold if an active relationship exists**
 - Allows users to see if there is an active relationship for the person record
 - The date of the last added relationship will also be shown

FileFinder for Desktop

Home Look-up Search New Import Compliance

People

- Memo Text
- Attachments
- Intelligence
- Relationships (05/03/2025)**
- Web Research
- Reports

Home Page

Bob Howell
Person Id: 50928

Actions

Details Details 2 Flex Details Work

Ownership: S G, All Users,

Reference:

Title:

First Name: * Bob

Middle Name:

Last Name: * Howell

Relationship Details

Bob Howell

Actions

Relationships Colleagues Education References Log

Drag a column header here to group by that column

Full Name	Relationship	Related Person's Name	Don't Mention	Job Title
▶ <u>Bob Howell</u>	Colleague	<u>Abubakar Elmi</u>	<input type="checkbox"/>	1111

- Work Record "Employment Type" field is now added as searchable field in Person Search under the Work section

Search Person

Query Results

Fields

- Min Required Rate
- Next Available On
- Unavailable reason
- Unit Type
- Blank Emails
- Email Address
- Address
 - Address
 - City
 - Country
 - County/State
 - Person Address Type
 - Post Code Radius
 - Zip/Postcode
- Off Limits
 - Comment
 - Date From
 - Date To
 - Is OffLimits
 - Off Limit Type
- Work
 - Company Name
 - Current Job
 - Date From
 - Date To
 - Default (Write To)
 - Division
 - Employment Type
 - Job Notes
 - Job Order
 - Job Title
 - Key Contact

Sort Add Condition Add Group Add Section Remove Clear All

Work Current Job Previous Job Before Previous Job

Company Name Contains or blank

AND

Current Job Equals Yes No or blank

AND

Date From Is between or blank

AND

Date To Is between or blank

AND

Default (Write To) Equals Yes No or blank

AND

Division Contains or blank

AND

Employment Type Equals Interim or blank

AND

Job Notes Contains or blank

AND

Job Order Is between or blank

- **Allows users to search Employment Type (Interim, NED or None) from the Edit Work Record screen**

Edit Work Record

Update Information and click ok button to save changes.

Is Registered:

Company Name: *

Division:

Job Title: *

Date From: +

Assistant:

Date To: +

Checked On:

Checked By:

Current Job

Default (Write To)

Key Contact

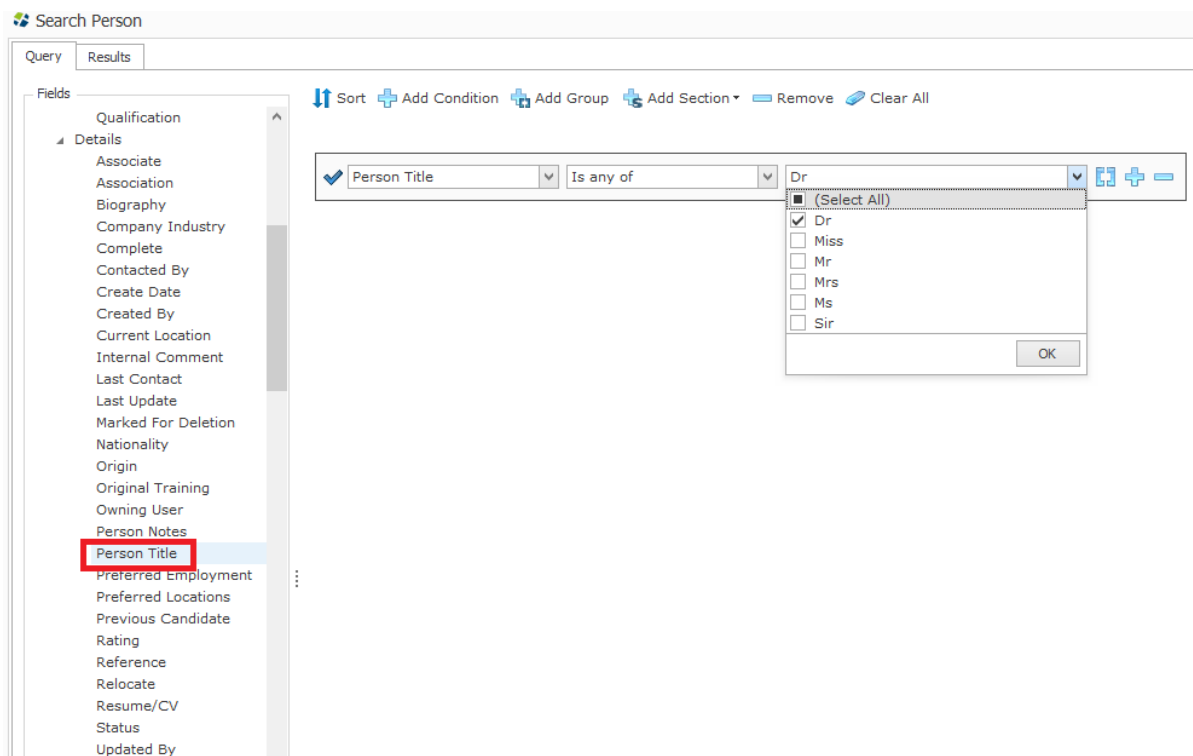
Employment Type

Interim

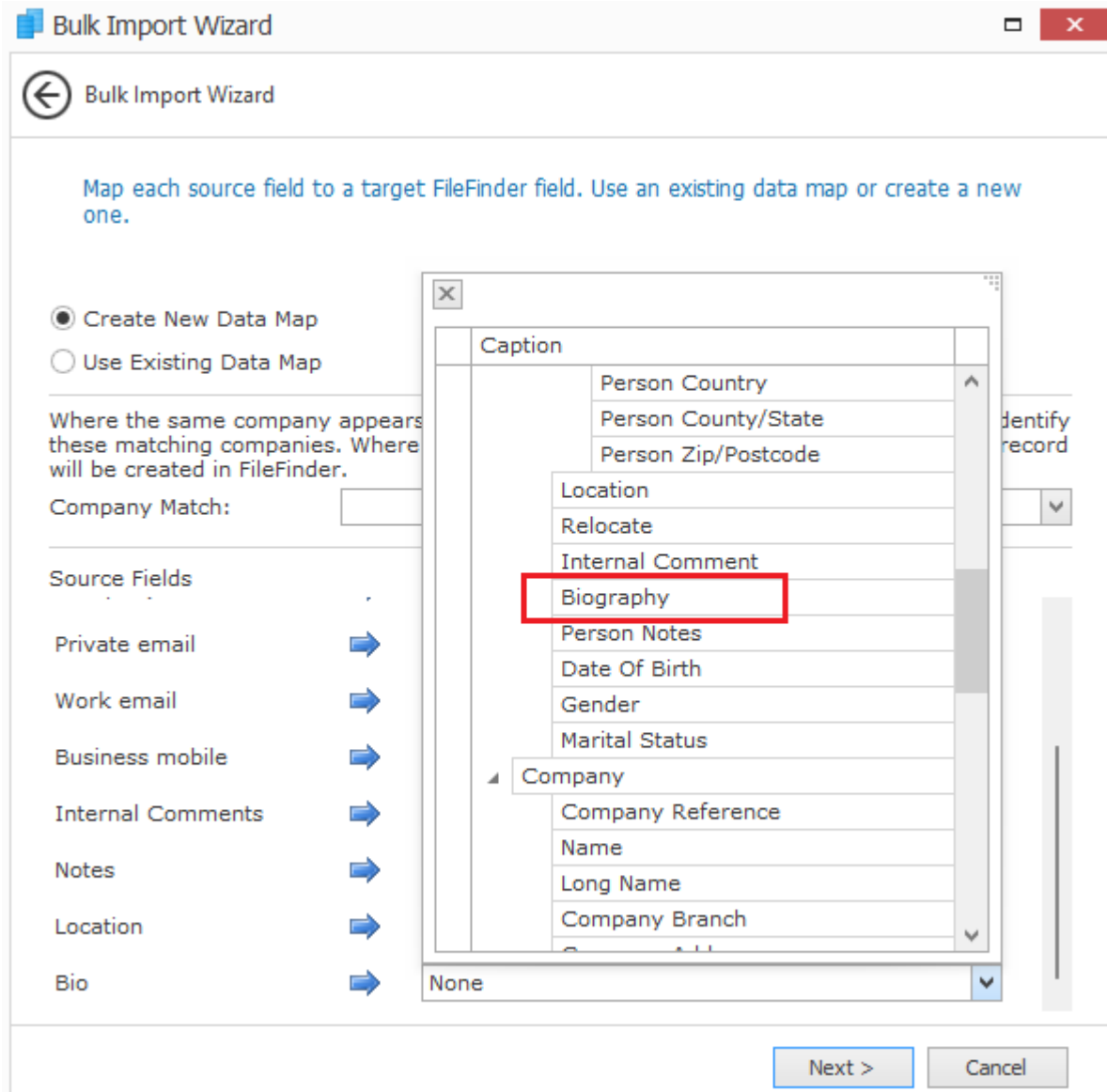
NED

None

- **"Person Title" field added in Person Search**
 - Allows users to search on a person's Title from the Details tab in FileFinder



- **"Biography" field added as a mappable field in Bulk Import**
 - Allows users to import a biography for Person records when importing spreadsheets into FileFinder



- **Assignment Type column added to Assignment lists**
 - "Assignment Type" column will be part of the System Default view

<input type="checkbox"/>			Company	Assignment	Registered	Status	Assignment No	Reference	Attachment Date	Owning User	Assignment Type
<input checked="" type="checkbox"/>			Ikiru People edit	Daud test 1	14/12/2020	Started	1994			S G	new2
<input type="checkbox"/>			Ikiru People edit	Ikiru Test Assignment	14/12/2020	Assign - Active	1993	IKR	02/07/2021	S G	New Account edit 11111
<input type="checkbox"/>			M&G	test	01/02/2021	Started	1997			S G	
<input type="checkbox"/>			DSM Demolition	test	21/10/2021	Started	2005			S G	
<input type="checkbox"/>			MobComp2	test	05/10/2021	Started	2000			S G	
<input type="checkbox"/>			Ikiru People edit	test	02/12/2022	Started	2015			S G	
<input type="checkbox"/>			m&s	test	18/01/2021	Started	1996			S G	
<input type="checkbox"/>			test123	test	27/10/2020	Started	1991			S G	
<input type="checkbox"/>			Ikiru People edit	Test	31/03/2021	Started	1998			S G	
<input type="checkbox"/>			Test 12345	test 123	08/08/2023	Assign - Active	2030			S G	
<input type="checkbox"/>			Ikiru People edit	test assing	13/10/2021	Started	2003			S G	
<input type="checkbox"/>			Ikiru People edit	test1	10/03/2023	Started	2017			S G	
<input type="checkbox"/>			Ikiru People edit	test3	17/12/2020	Started	1995			S G	

- **Ability to turn off auto generation of Invoice reference numbers**
 - Users can now turn off auto generation of Invoice reference numbers using the Auto Numbering option in FileFinder Admin and selecting "Free Text"

Reference Number Setting

Reference can be a combination of Prefix, Delimiter, and Suffix but 'Number' is mandatory. This should be set before entering any data into FileFinder and then left unchanged.

Reference Number For:
 Invoice

Free Text
 Generated

Prefix: [] []
 Delimiter: []
 Number: * 394 Increment: * 1
 Delimiter: []
 Suffix: [] []

Preview []

Help OK Cancel

- **This allows users to add their own Invoice Reference number when creating a new Invoice in an Assignment**

Add/Edit Invoice

Enter Invoice Details and Click OK to Save.

Reference: * Inv 456 Parent Invoice: []

Type: * [] Client Contact: []

Invoice Date: [] Expected On: []

Currency: * GBP Conversion Rate: 1.00

Description: * []

Comment: []

- **"Paid On" date added to Assignment Invoices infobox**
 - "Paid On" date column has been added to the Assignment Invoices infobox
 - Users can also Sort and Filter by this column when creating a custom view for this infobox

Total Amount	Paid Amount	Paid On	Created On
100		08/01/2025	10/01/2025
10800	10800	06/03/2017	15/12/2016
3328.2	3328.2	24/02/2017	31/01/2017
9900	9900	07/02/2017	17/11/2016
9900	9900	01/02/2017	01/12/2016
15300	15300	01/02/2017	02/11/2016
5400	5400	01/02/2017	13/01/2017
3480	3480	01/02/2017	13/12/2016
10800	10800	20/01/2017	07/11/2016
14472	14472	20/01/2017	18/11/2016
7200	7200	21/12/2016	16/11/2016
14400	14400	21/12/2016	17/11/2016

- **FileFinder Browser Email templates are now accessible from the FF O365 app**
 - The option to select Email Templates has been added when using "New Email and Log in FF" and "Reply and Log in FF"

The screenshot shows the FileFinder email interface. At the top, there are buttons for "Select Email", "Insert Signature", "Edit Separately", "Task", and "Appointment". The "Select Email" button is highlighted with a red box. Below these buttons, there is a "Contact Type:" field set to "General Contact". A "Send" button is visible, along with "To:" (set to "Private"), "CC", "BCC", "Subject:", and "Attachments:" fields. Below the main interface, a "Select Email" dialog box is open, displaying a list of email templates: "Revised Resume", "1111 - (en)", "aaa - (en)", and "Calibri - (en)".

Bug Fixes

CV parsing not pulling Person qualifications correctly from Resume/CV

When parsing a Resume/CV it does not pull the correct qualifications from the document being parsed.

This has been resolved.

Creating new person with Quick Import from Add New closes FileFinder

Create a new person and click on Create from Web.
 Find the person on LinkedIn and click the More button, then Save to PDF.
 You get the usual Save, Attach, Import options and Quick Import.
 All options work except Quick Import. If you click it, it says " Cannot Connect to server". If you click OK, then FileFinder closes. The record is created but nothing is imported.

This has been fixed

Duplicate placed log

If a candidate is Placed and you create a new log for them, it adds "Placed" to the New Progress field.
 If the user does not manually remove this, it will create a new (duplicate) "Change of Assignment Candidate Progress" log as well as the log they are creating.

This has been fixed

Skills Mapping crash

Admin
 Customization > Click Skills Mapping
 Crash

This feature has now been removed as auto keyword skilling is enabled by default when parsing a Resume/CV

Admin Localization not working

When adding Localization text for picklists it does not work. It looks like it is putting the German value into the English localization field. However, in the front end the picklists are not translated when switching languages.

This has been fixed

Country picklist not being translated

I have a German client who is creating address labels, and they noticed the country name is in English (i.e. it says Germany instead of Deutschland).

I connected to their FileFinder and switched to German and checked an address and it's using the English picklist instead of the German one.

This has been fixed

Company Merge issues

When you Merge two company records, the Branch and Ranking fields do not come through.

Merge two Companies

Select Branch and Ranking on the duplicate record

Select Merge

The Branch and Ranking still shows the original values

This has been fixed

Unable to Import PDF in Web Profiles from the Outlook Add-in

Outlook

Link Person record

Open in FF

Open Web Profile on Summary tab

Click Save PDF

Import

Shows "No Data to Import" error

This has been fixed

Browser Email signatures issues

Fixed the following issues with Browser signatures:

1. Signature is added automatically when composing a new email, it should show only when clicking on the Insert Signature option
2. Signature cannot be removed once added
3. Clicking Images freezes Browser
4. Font is not consistent when clicking in the field

FileFinder for Mobile not setting company Switchboard or URL as default

Open an existing Company record in Mobile

Click Edit

Add Switchboard and URL

Refresh > Switchboard and URL do not show (They are not set as default)

This has been fixed

Placed Candidate screen issues

Fixed layout issues and Off-Limits icon not appearing on the Placed Candidate screen