Release 2.16.10

Note: If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

New Features

Users

Broadbean - Switchable Job description/Vacancy Notes

A new switch has been added to IQX which allows either the Vacancy Job Description or Vacancy Notes to be added to Broadbean advert.

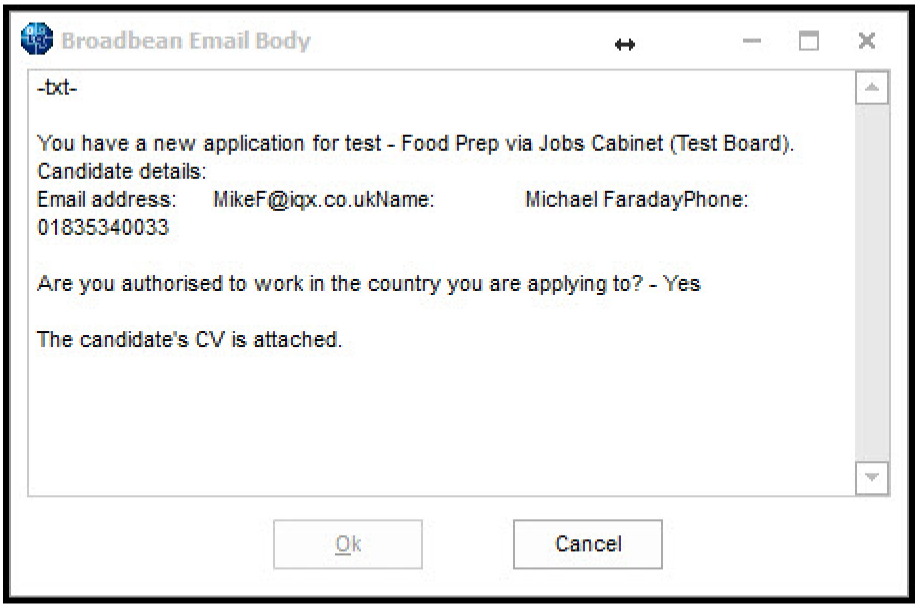
This requires System Administrator set up.

Broadbean hybrid duplicate record check

When importing a candidate from Broadbean the first line of the address and postcode of the candidate is now included. This will allow this information to be compared with possible duplicates. Additional information has been added to the duplicate candidate window showing candidate state and alert information.

Broadbean Email Body Text saved in IQX

The source of the application and email body text is now visible in the Import Candidate and add to Shortlist view. The email body text is stored as a contact event in the candidate record.



This requires System Administrator setup.

Semi-automatic import of Suitable candidates

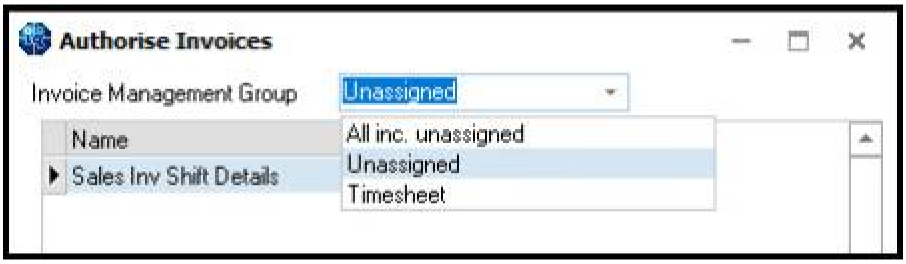
Where Broadbean has ranked CVs outside IQX, ‘Suitable’ candidates can now be semi-automatically imported into IQX. When users press the Retrieve Candidates button, the Import Candidate And Add to Shortlist view is automatically called for each new 'Suitable' Candidate.

Where there are potential duplicate candidates that are Duplicate Candidate window will be displayed.

This requires System Administrator set up.

Invoice management Group option of unassigned added

In Invoice Temp Timesheets, Authorise Invoices and Send invoices the option to select and view unassigned timesheets has been added.



Invoicing, attaching timesheets. If general setting is on can turn off at company

When invoicing, the choice of NOT sending linked timesheets with an invoice can be set at global and account level.

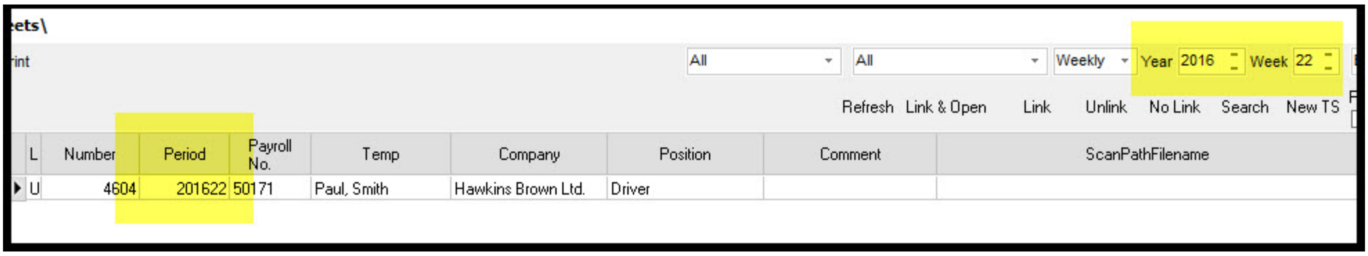
The local setting is in Company – Accounts – Invoice PDF exclude timesheets.

Generally, local settings override global settings.

This requires System Administrator setup to activate the global setting.\

Timesheet image linking. Period column added

In Accounts – Timesheet image linking a period column has been added to the display.



Release 2.16.12

Note: If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

New Features

Users

Enhancements to Questionnaires

Questionnaires have been modified to allow the use of 60 characters in questions, choices and sub-choices.

In addition, font colours can be added to the questionnaire captions in Departmental and General questionnaires. The fonts are set up by adding a colour to the furthest right column of a question.

Departmental Questionnaire for companies

Departmental questionnaires for companies can now be added for each department. This functionality can be used target questions at a Department level and avoid having to scroll through long lists of irrelevant question in the Company form.

Image of companies button.

This requires System Administrator set up.

Multi-select extended to Reports

The multi-select functionality previously used in Mail Merge has been extended to Reports.

Select the records to be the focus of the report. Select the appropriate report. Choose either All records or Highlighted records from the drop down dialogue box and run the report.

Streamlining of CV creation in Template

The process of replacing a CV with one created from a CV template has been streamlined by combine existing functions to improve work flow and speed.

In a Person record – CV select replace CV – Confirm Replace CV – Choose whether to keep searchable text (keeping searchable text allows it to be inserted into the new CV) – CV Template view opens.

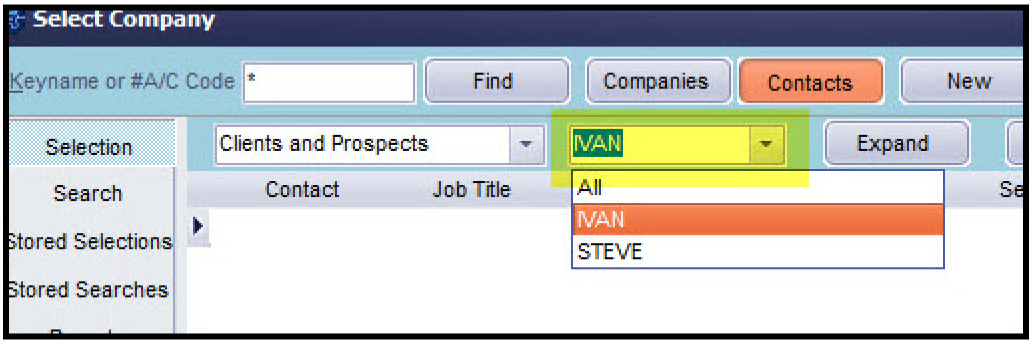
New Sales layout for Company Form

A new switch and role has been added to Company contacts so that Consultants can own contacts.

With the Sales consultant role contacts can be filtered using the drop down visible in the Companies – Contacts Selector.

111 Terminology	Sales Staff Name	Sales Consultant
112 Terminology	Sales Staff Plural Name	Sales Consultants

Contacts can be allocated in the top right view of a Company contact record.



Sales information can be viewed in a new tab in the left hand vertical tool bar.

Who's interested – records the user details of a User who has added the contact to their favourites view. Ranged Activity – displays time banded data related to Contact Events, Interviews, Invoice Count and Value, Placements and Vacancies. Sales Questionnaire – Sales Questions set up using Sales Question grouping -100 in Company Questionnaire. Notes, Mailer Lists and Stored Sections are existing functionality.

This requires System Administrator set up.

Enhancement to Person Bulk Emails

It is possible to send simple html Bulk Emails with a signature and have contact events recorded against each recipient of the email.

This requires System Administrator set up.

Switch to apply CE combo filter to selectors

A User's view of contact events in a record can be filtered according to their own Contact events or all.

The filter is set up in Users – Combo box filters.

Image

The filter is applied in a record by selecting yes in the Own Type drop down in Company, Company Contacts, Person and Vacancy record view.

Image

The filter will display those Contact Events matching the combo box type and Contact events without a combo box filter.

Accounts Colour

With the addition of Self Billing functionality the option to differentiate between Self Billing and standard views has been added to avoid confusion.

This requires System Administrator set up.

Extend make auto Contact Event functionality to Availability entered via Diary

Auto Contact event functionality has been extended to Availability set in Diary.

Image?

The Contact Events differentiate between Availability, Unavailability and Holidays.

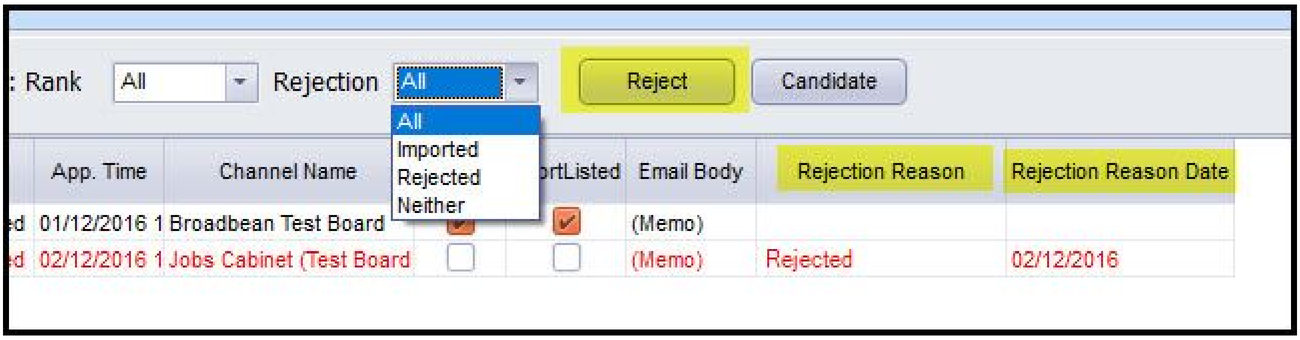
Image

If the same availability type e.g. holidays, is added consecutively only one contact event will be generated.

This requires System Administrator set up.

Broadbean - rejection (non import) reason

When reviewing Broadbean Vacancy applications, the reason for rejecting a candidate can be recorded and is displayed on the far right of the Broadbean Import view



This requires System Administrator set up.

Vacancy - Shift Progress

In Vacancy - Shift Progress a new Fill button has been added which opens up the Fill Vacancy wizard allowing another route to booking a candidate to a vacancy.

In addition, a new column ‘Our Ref has been added along with a Hide Filled (shift) button.

Image .

Ability to control colour of Notes on Outlook bar

It is now possible to amended the colour of Memo Type items in the Outlook bar in a record. E.g. Notes, Extra Notes.

The change of colour is activated when text has been entered into that field.

This requires System Administrator set up.

Person compliance staff

It is now possible to assign consultants as compliance consultant in a Person record.

Images of New view.

This requires System Administrator set up.

Person compliance staff

More explanation has been added when connections fails. There are four different types of failure and each having different warning messages.

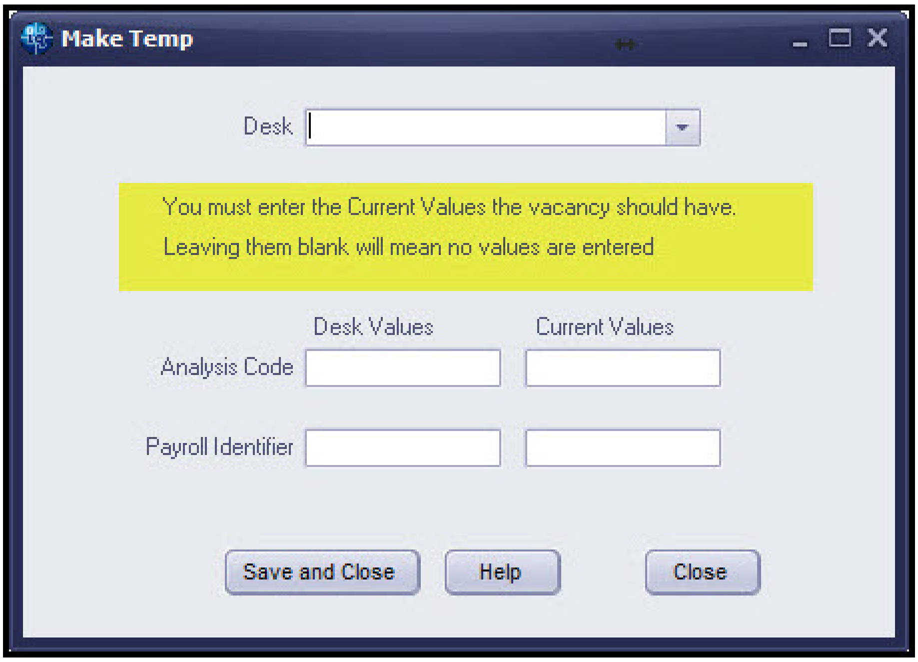
- When a wrong user id or password is entered the warning message will be - 'Invalid username or password'.
- If a user tries to login using a defunct user login the message will be - 'User is not currently authorised'.
- If trying to login to a missing database or the wrong database this warning message will appear - Database name incorrect or not set up’.
- Any other form of error will produce - 'Database connection error' with a button for further details.

Add to Pop Up notification Days as well as Minutes

Pop up notifications can now be set in days as well as minutes. The maximum number of days that can be set is 21 days or 30240 minutes.

Clearer message needed when making a perm vacancy temp

When converting a vacancy from permanent to temporary a warning to enter Current Values for the Vacancy has been added to inform users that Leaving the Make Temp values blank will result in no values being entered.



Add background colour to shift if has a shift progress link

When in Temp Desk – Shifts, it is possible to have a visual check of which shifts have short lists attached to them.

This requires System Administrator set up.

Improve notifications when a timesheet query ("TS Query") is raised

When a query is raised by an Accounts user against a provisional timesheet it is possible to have a popup generated which is sent to all users in the same tempdesk provided they do not have an Accounts role.

The existing Temp Desk queries message on Temp Desk also now shows a count of Timesheet queries.

This requires System Administrator set up.

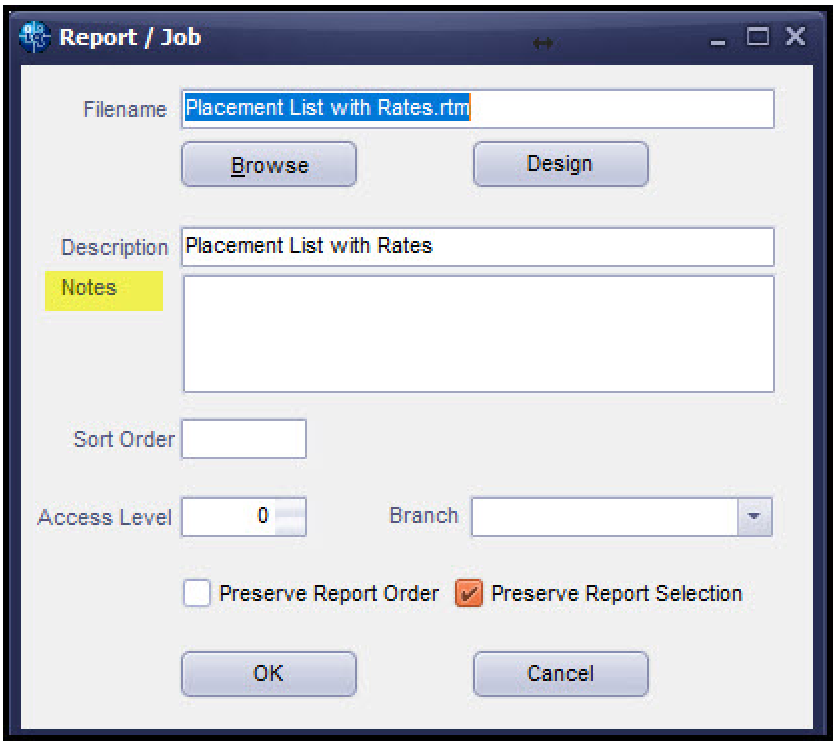
Size Limit for Documents being added

Compliance and other documents can have a maximum file size set to stop over large files being saved to the database.

This requires System Administrator set up.

Basic reports view, adding notes column

In reports view a notes column has been added so that additional information can be entered against a report. The Notes column is populated by selecting a report and clicking edit. The Notes section can be filled in the next dialogue box.



Single sign on

It is now possible to log into IQX using Active Directory protocols. Therefore provided a user has the required permissions and security setup clicking on the IQX icon will silently log the user into IQX.

Where there is an error with the Active Directory setup the login will default to a standard login dialogue box.

Active Directory setup will require System Administrator/IT department set up.

[May need additional information. Ivan needs to discuss with Sean]

Bulk CV Import Candidate State

When using Bulk CV import it is possible to set the initial state for perm and temp candidates through partial filtering.

This requires System Administrator set up.

Broadbean candidate download prob is pdf cv

Broadbean candidates can submit CVs in pdf format. IQX has been updated to allow the information contained in pdf CVs to be imported into IQX.

When a pdf CV is imported into IQX a warning message appears warning it will be XMLd.

Users are warned to check the CV data as the XML process affects the display of CV data. When in IQX the pdf will be recorded in Person – Document as Broadbean CV with file type pdf.

A new tab, Broadbean, on the outlook view beneath Audit Trail records Broadbean status of applications.

The CV Text is stored in Person - CV.

The CV Text can be used to create a doc cv.

Vacancy Teams, view on Desktop

In desk top consultants can have their default view set to their vacancy teams instead of their consultant view.

Image

This requires System Administrator set up.

New tab on DeskTop to track potential vacancies

A new tab under Current Vacancies for Tracked Vacancies can now be added to track a different Vacancy state than Current Vacancy.

IImage

This requires System Administrator set up.

System Administrator

Departmental Questionnaire for companies

Departmental questionnaires for companies can now be added for each department. This functionality can be used target questions at a Department level and avoid having to scroll through long lists of irrelevant question in the Company form.

This is set up in the usual way via Agency Setup – Departments – Select department – Companies button.

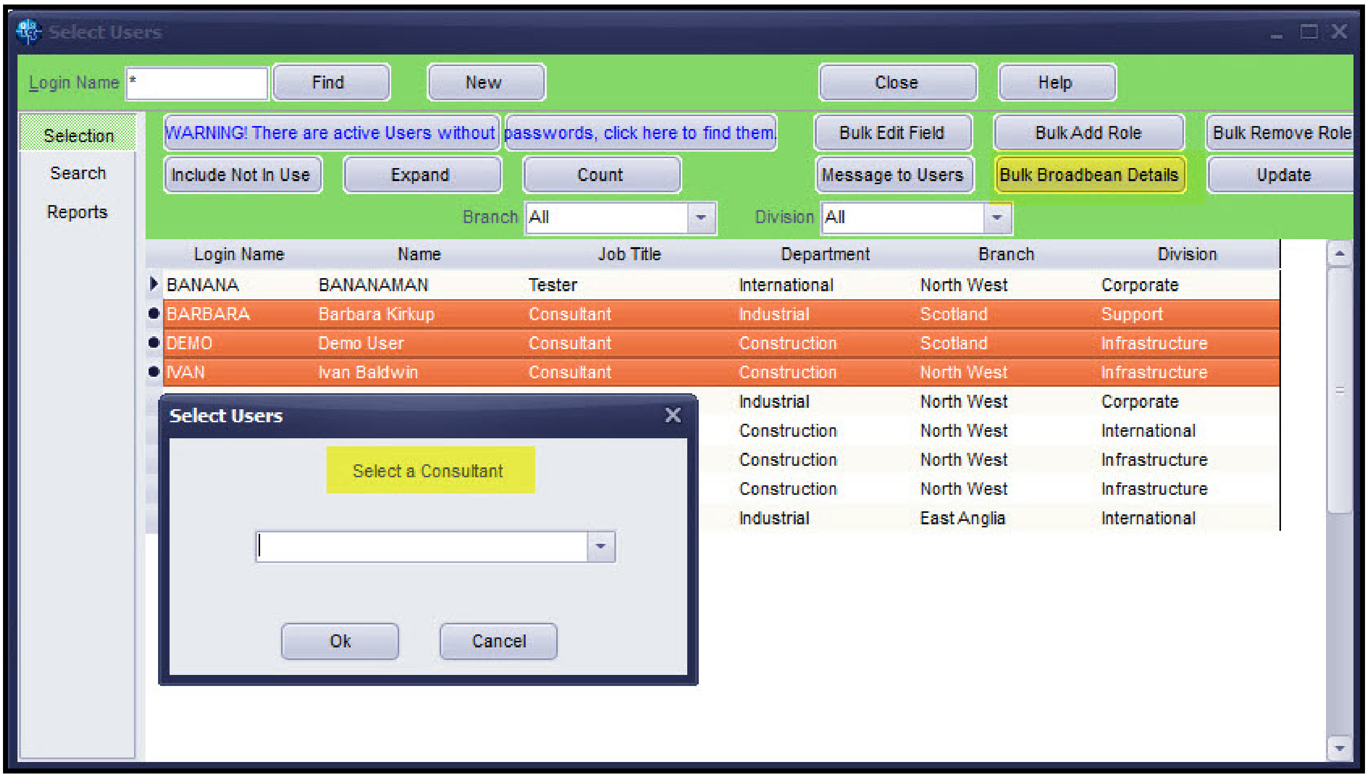
Image of companies button.

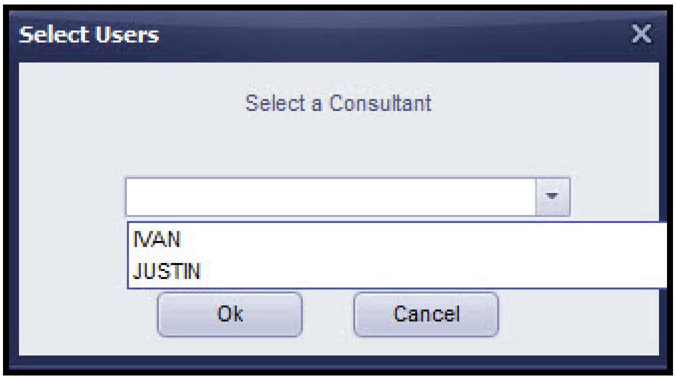
Bulk Update of Broadbean User role

Adding Broadbean User roles to many staff can now be done using the Bulk Broadbean Details button in Maintenance – Users.

Select the Users who require updating. Click the Bulk Broadbean Details button and select the consultant whose details you wish to copy.

Image of Select Users/Broadbean button.





Mailchimp Enhancements

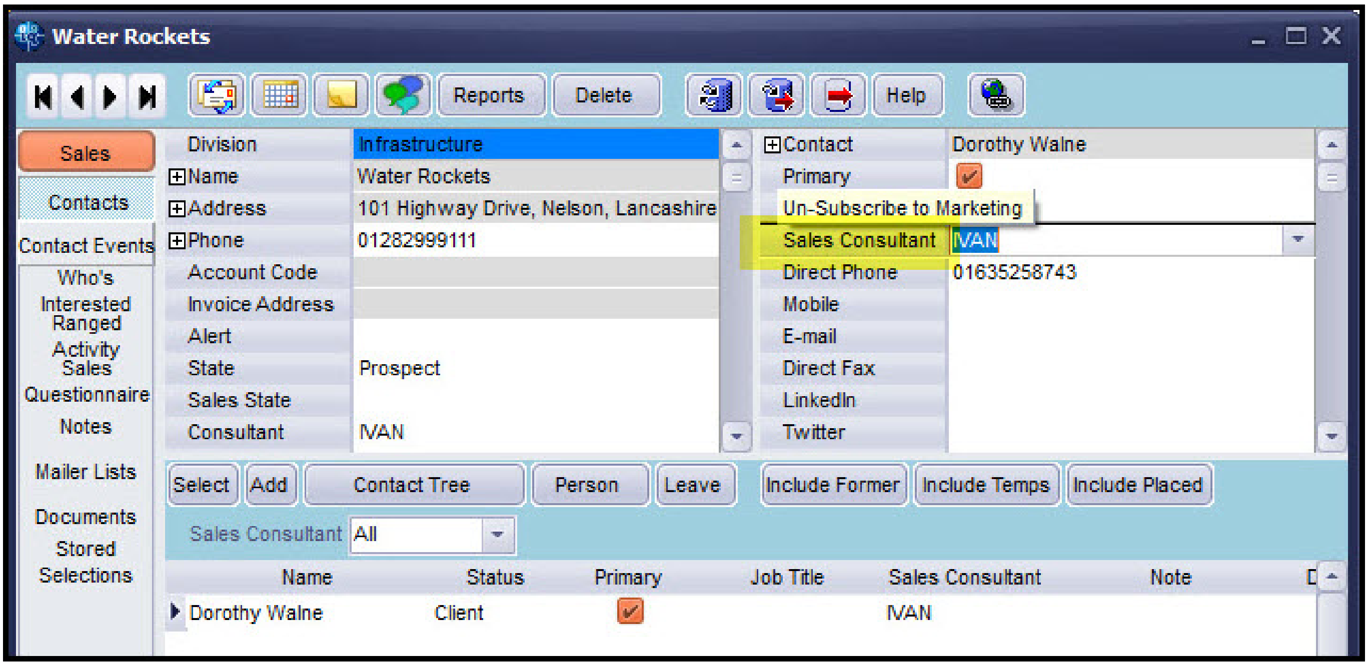
Mailchimp have updated their API to v3.0 and from January 2017 v2.0 will not be supported by Mailchimp.

IQX has been updated to accommodate this change. Companies using Mailchimp should have received their new Mailchimp API from Mail chimp.

New Sales layout for Company Form

A new switch and role has been added to Company contacts so that Consultants can own contacts.

The role can be added in Maintenance – Users. In this example the role is called Sales consultant. The Terminology can be amended in General Settings - Terminology – 111 and 112.



With the Sales consultant role contacts can be filtered using the drop down visible in the Companies – Contacts Selector.

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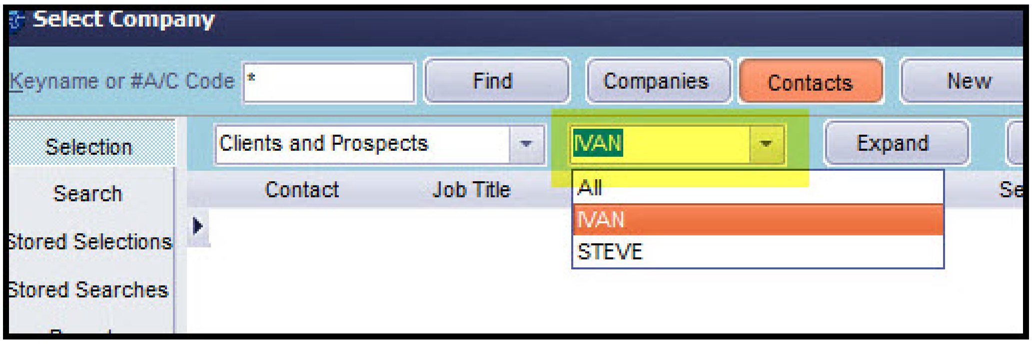
Contacts can be allocated in the top right view of a Company contact record.



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Enhancement to Person Bulk Emails

It is possible to send simple html Bulk Emails with a signature and have contact events recorded against each recipient of the email.

The Role is set up in Maintenance - Users – Send Bulk Emails. Please note it requires HTTP Email to be set up or nothing is sent.

Switch to apply CE combo filter to selectors

A User’s view of contact events in a record can be filtered according to their own Contact events or all.

The filter is set up in Users – Combo box filters.

Image

The filter is applied in a record by selecting yes in the Own Type drop down in Company, Company Contacts, Person and Vacancy record view.

Image

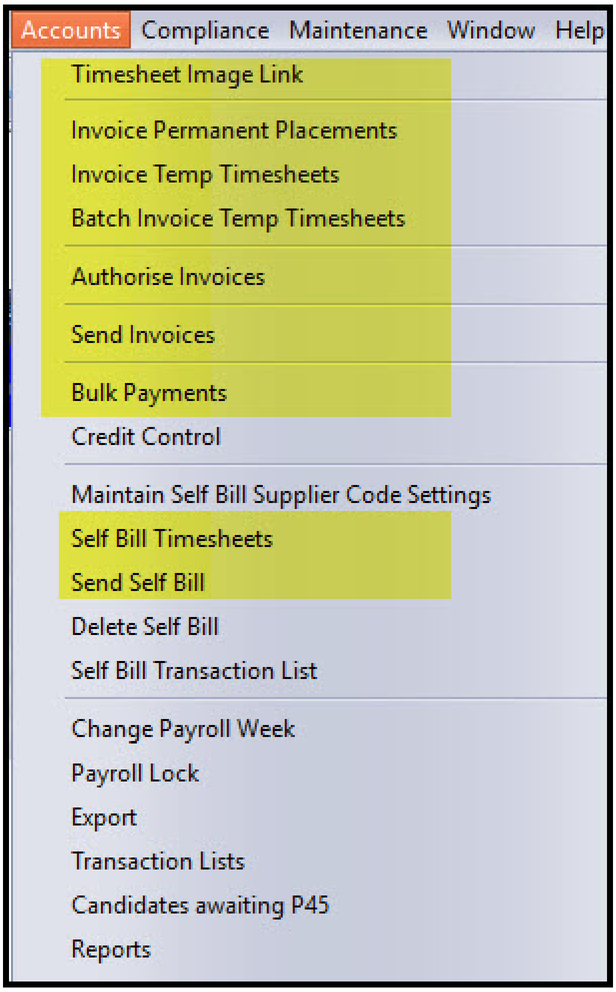
The filter will display those Contact Events matching the combo box type and Contact events without a combo box filter.

Accounts Colour

With the addition of Self Billing functionality the option to differentiate between Self Billing and standard views has been added to avoid confusion.

Therefore, in General Settings – Colours – 510 and 520 form colours can be added.

In the image below the first block is controlled by Colours – 510 and the second by Colours – 520



Extend make auto Contact Event functionality to Availability entered via Diary

Auto Contact event functionality has been extended to Availability set in Diary.

Image?

The Contact event type used for these Contact Events is set up in General Settings – Temps – 440.

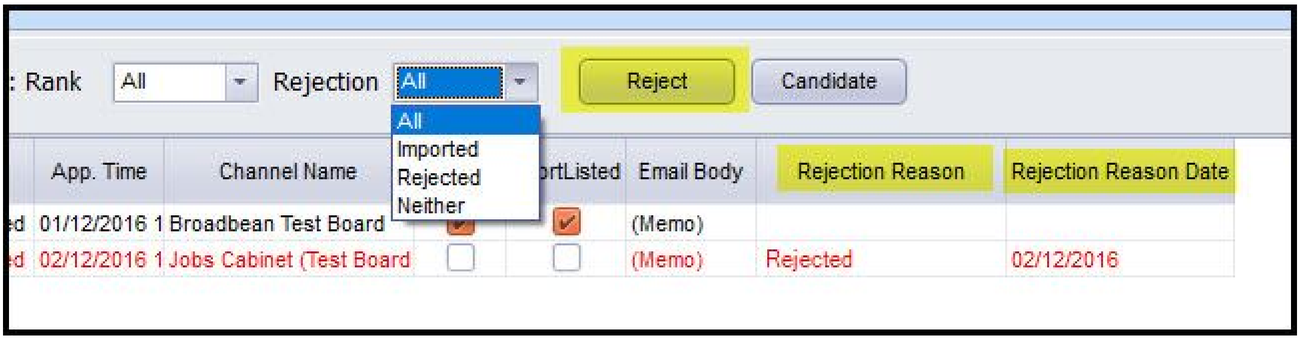
The Contact Events differentiate between Availability, Unavailability and Holidays.

Image

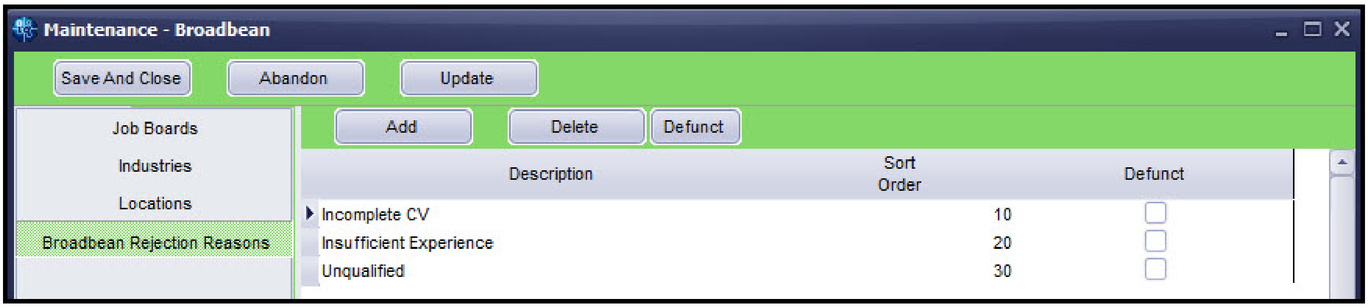
If the same availability type e.g. holidays, is added consecutively only one contact event will be generated.

Broadbean - rejection (non import) reason

When reviewing Broadbean Vacancy applications, the reason for rejecting a candidate can be recorded and is displayed on the far right of the Broadbean Import view

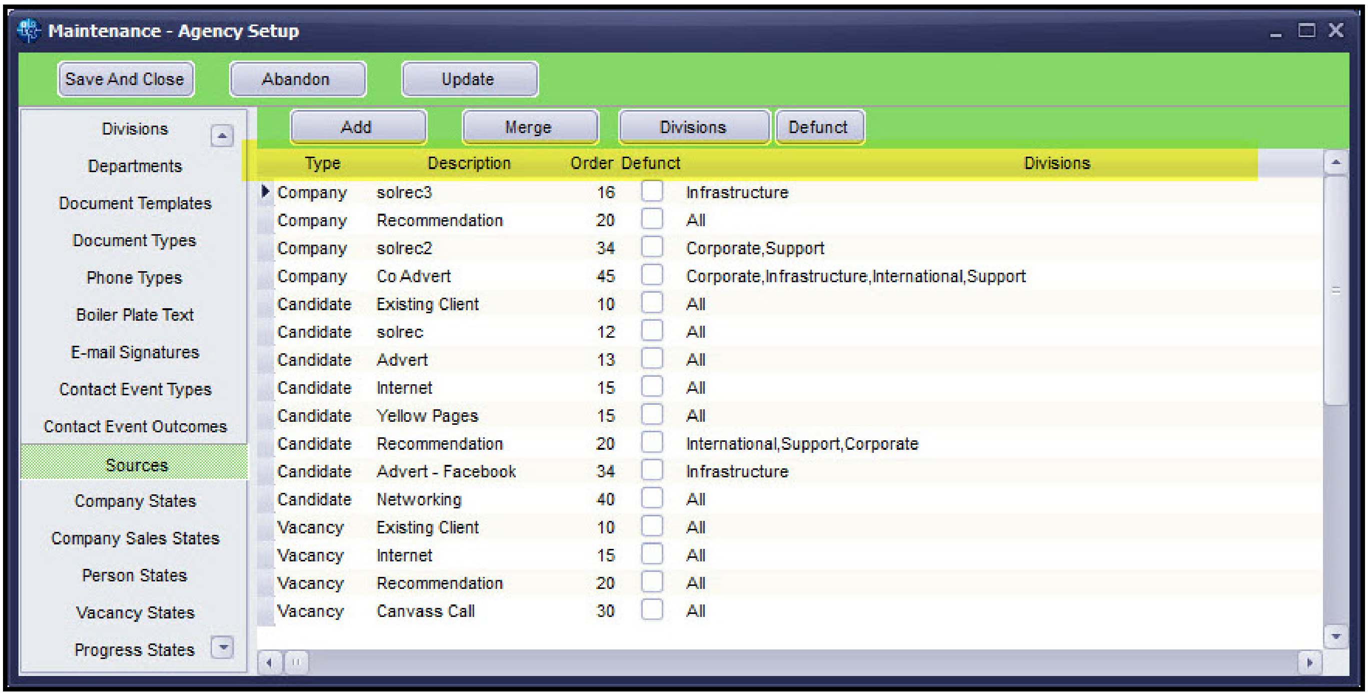


The reasons can be set up in Maintenance – Agency Setup – Rejection Reason



Source Maintenance

In order to provide flexibility in naming sources for different record types (Company, Vacancy, Candidate) and providing the option to allocate sources to divisions Agency Setup – Sources have changed.

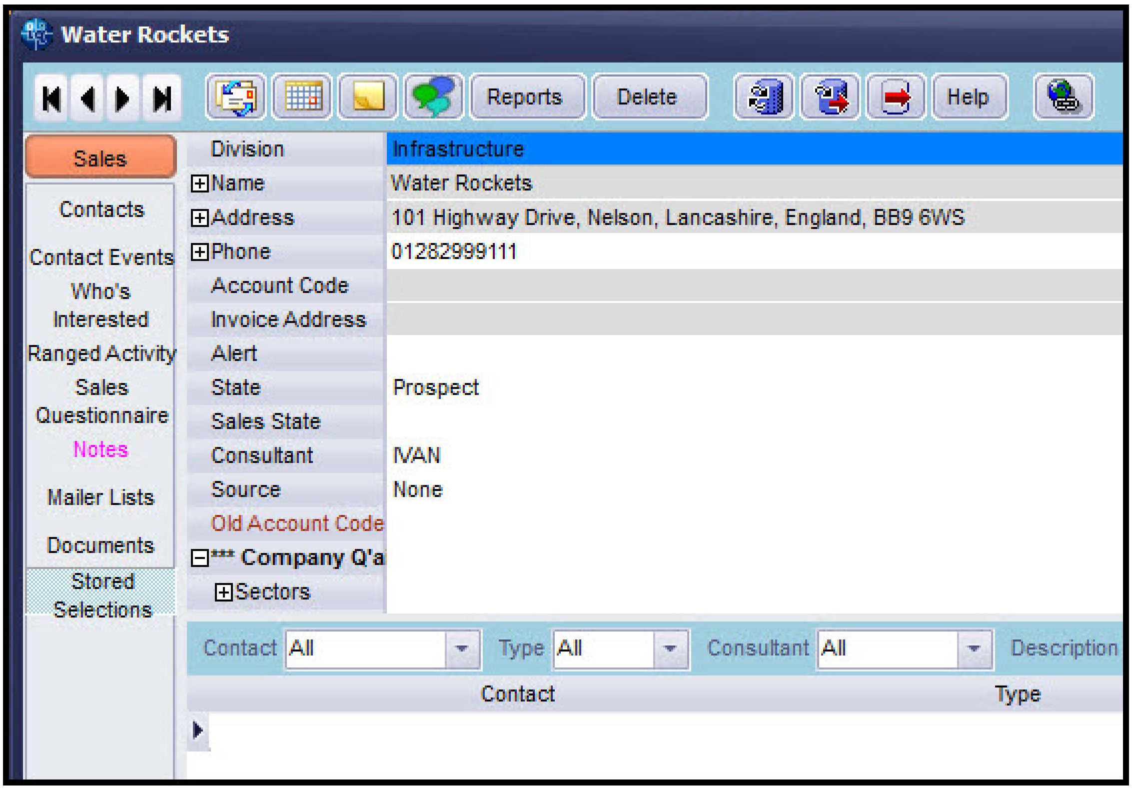


The function of sources within records has not changed.

However, the migration of source data from the vacancy class table to the originid table has the potential to break validations, reports, searches etc using the vacancyclass table. Please contact IQX for support in modifying such reports etc.

Ability to control colour of Notes on Outlook bar

Using General Settings – Colours – 530 Memo Colour it is now possible to amended the colour of Memo Type items in the Outlook bar in a record. E.g. Notes, Extra Notes.



The change of colour is activated when text has been entered into that field.

Person compliance staff

It is now possible to assign consultants as compliance consultant in a Person record.

This functionality is activated in General Settings - Settings 2030 – Y whence a new field will become visible under consultant in left window of a Person view. The consultant appearing in this drop down list will all have a Compliance user role of ‘Can maintain Clearance/Compliance’

Images of Settings and New view.

Person compliance staff

More explanation has been added when connections fails. There are four different types of failure and each having different warning messages.

- When a wrong user id or password is entered the warning message will be - 'Invalid username or password'.
- If a user tries to login using a defunct user login the message will be - 'User is not currently authorised'.
- If trying to login to a missing database or the wrong database this warning message will appear - Database name incorrect or not set up'.
- Any other form of error will produce - 'Database connection error' with a button for further details.

Person compliance staff

Pop up notifications can now be set in days as well as minutes. The maximum number of days that can be set is 21 days or 30240 minutes.

Add background colour to shift if has a shift progress link

When in Temp Desk – Shifts, it is possible to have a visual check of which shifts have short lists attached to them.

A background colour set up in General Settings – Colour 60 will add that colour to the background of shifts with Short lists.

Improve notifications when a timesheet query ("TS Query") is raised

When a query is raised by an Accounts user against a provisional timesheet it is possible to have a popup generated which is sent to all users in the same tempdesk provided they do not have an Accounts role.

To set this up set General Settings – Temps 1070 to Y. In addition, No Popups will need to be set by inserting 0 against Switchable Fields 1340. The existing Temp Desk queries message on Temp Desk also now shows a count of Timesheet queries.

Size Limit for Documents being added

Compliance and other documents can have a maximum file size set to stop over large files being saved to the database. The maximum file sizes (in Kb) can be set in General Settings 2050 and 2060. Blank or) gives no limit to the maximum file size.

Single sign on

It is now possible to log into IQX using Active Directory protocols. Therefore provided a user has the required permissions and security setup clicking on the IQX icon will silently log the user into IQX.

Where there is an error with the Active Directory setup the login will default to a standard login dialogue box.

To set up IQX to permit silent login enter the required domain information into General settings - Security settings 20 and 25.

Active Directory setup will require System Administrator/IT department set up.

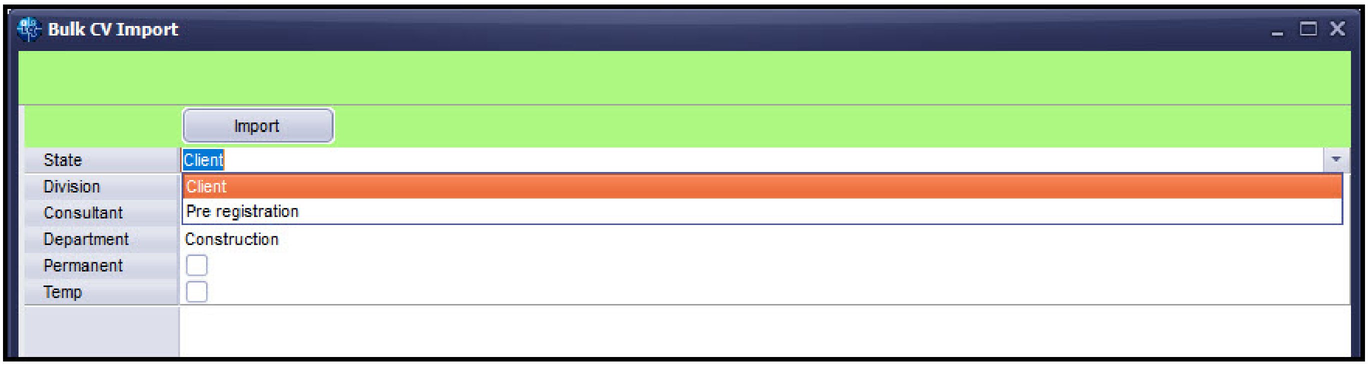
[May need additional information. Ivan needs to discuss with Sean]

Bulk CV Import Candidate State

When using Bulk CV import it is possible to set the initial state for perm and temp candidates through partial filtering.

In General Settings - Settings 1410 the initial status for perm candidates can be set.

In Agency Setup - Miscellaneous Settings the initial temp status is selected.



If perm is set to Null, then all the statuses will be listed in Bulk CV Import.

The error message 'You must select the Temp Initial Status' will appear if the import button is pressed, the temp tick box is clicked and the State differs from that set in Agency Setup.

Support for DTKBarReader.dll unlimited licence - System Admin

IQX has been updated to take advantage of the unlimited licence for the bar code reading dll -

DTKBarReader.dll. This useful for users of Job Runner.

Vacancy Teams, view on Desktop

In desk top consultants can have their default view set to their vacancy teams instead of their consultant view.

Image

This is set up by setting General Settings - Settings 2040 -Default Deskup Consultant to In-Team- Y. Settings 1450 - Allow Vacancy Team must also be set to Y.

New tab on DeskTop to track potential vacancies

A new tab under Current Vacancies for Tracked Vacancies can now be added to track a different Vacancy state than Current Vacancy.

IImage

General Settings - Settings - 2070 is used to set the Tracked Vacancy state.

Image

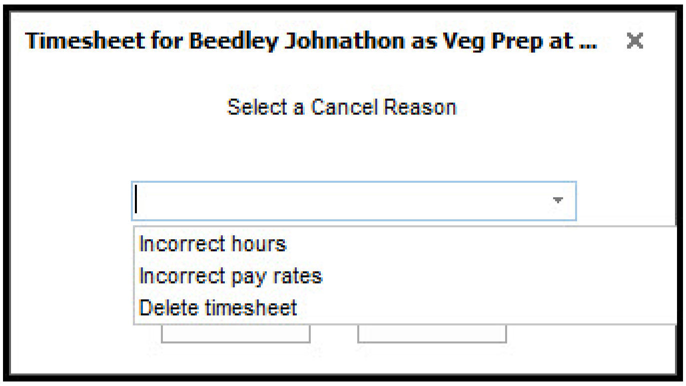
If Settings 2070 is left blank the Tracked Vacancy tab is not visible.

Timesheet entry from Person. Tempdesk defaults to latest timesheet or a registered desk

The default temp desk has been set to the latest timesheet or the registered desk of the candidate when entering timesheets. This ensures that the timesheet has an appropriate temp desk for that candidate.

Timesheet. Cancel reasons can be used

The timesheet Cancel or Correct process has been enhanced by the inclusion of a drop-down list of previously set up reasons e.g. rates, client, hours, breaks.



The reasons will appear on both the cancelled and amended timesheets.

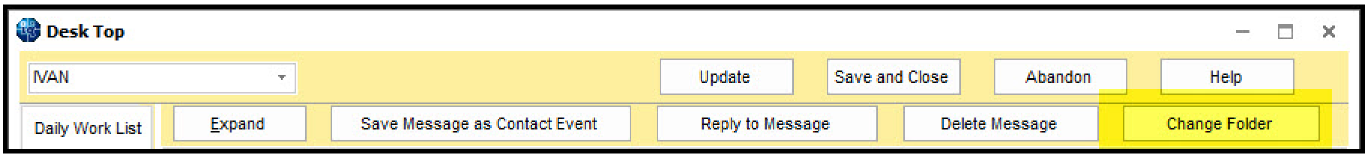
This requires System Administrator set up.

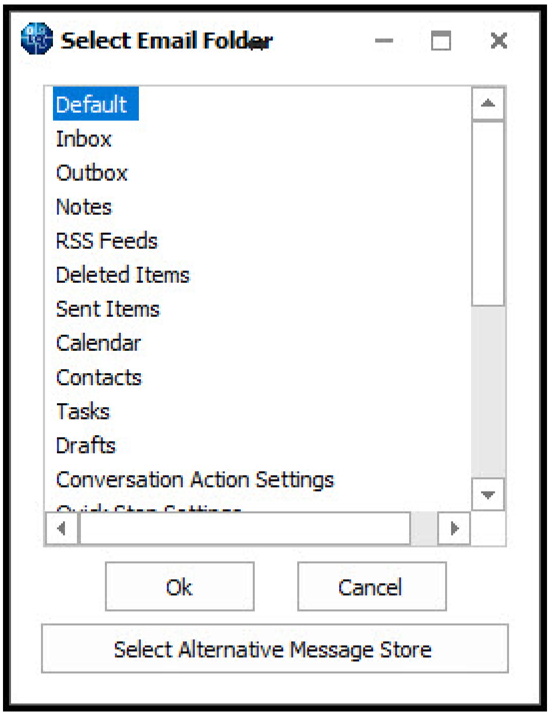
Timesheet, Cancel/Correct. Block contra, improve workflow

Workflow has been improved to silently block the cancelling of contract timesheet.

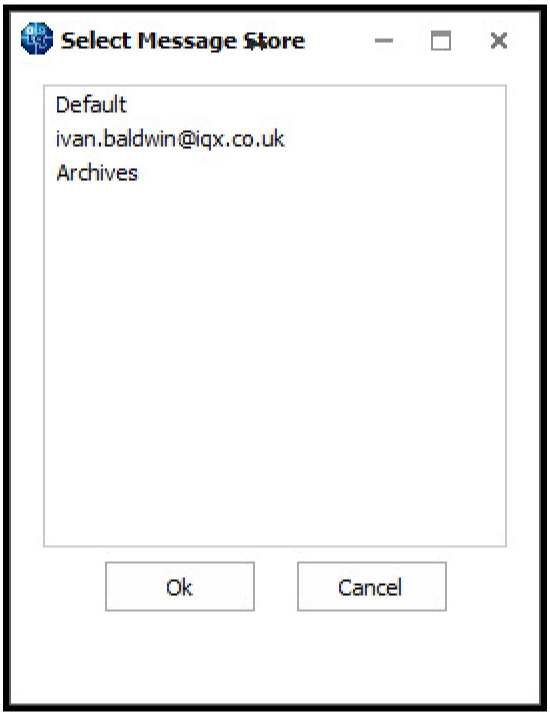
Access message store other than default

In Desktop – Inbox it is possible to change the default message store by clicking change folder and selecting a new message store.





The new selection is immediately displayed. For example, if all IQX emails are set to be stored in a specific folder this folder can be displayed automatically in the users inbox.

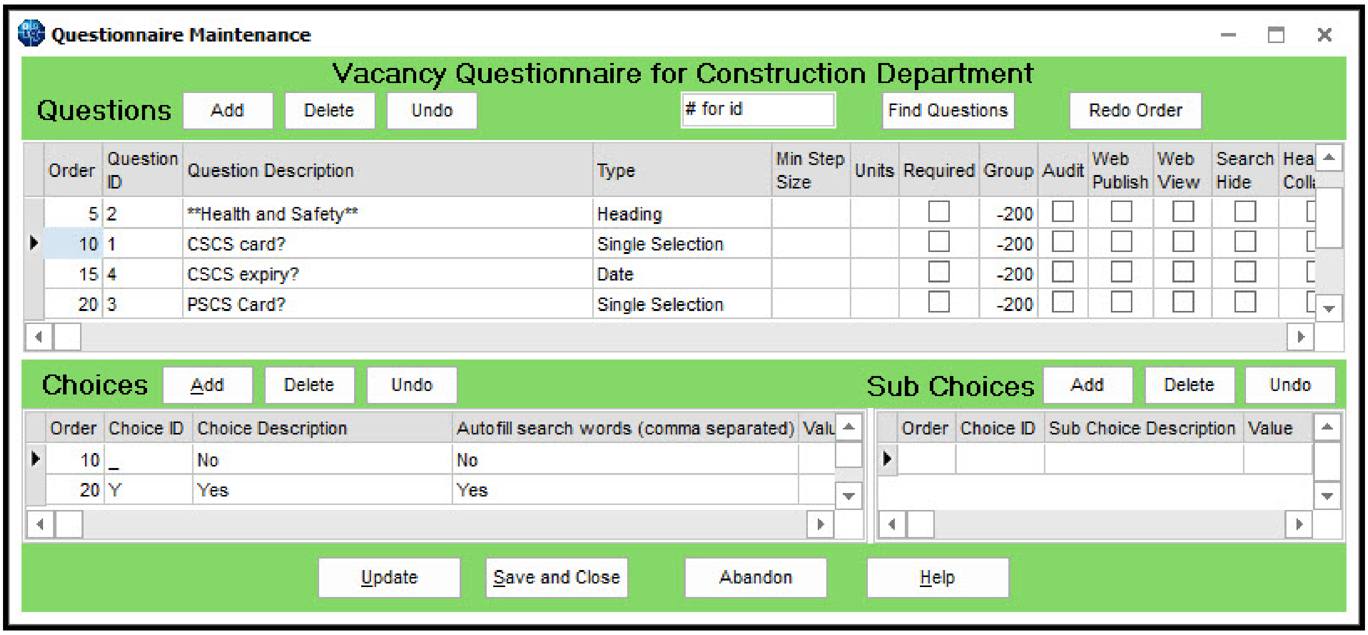


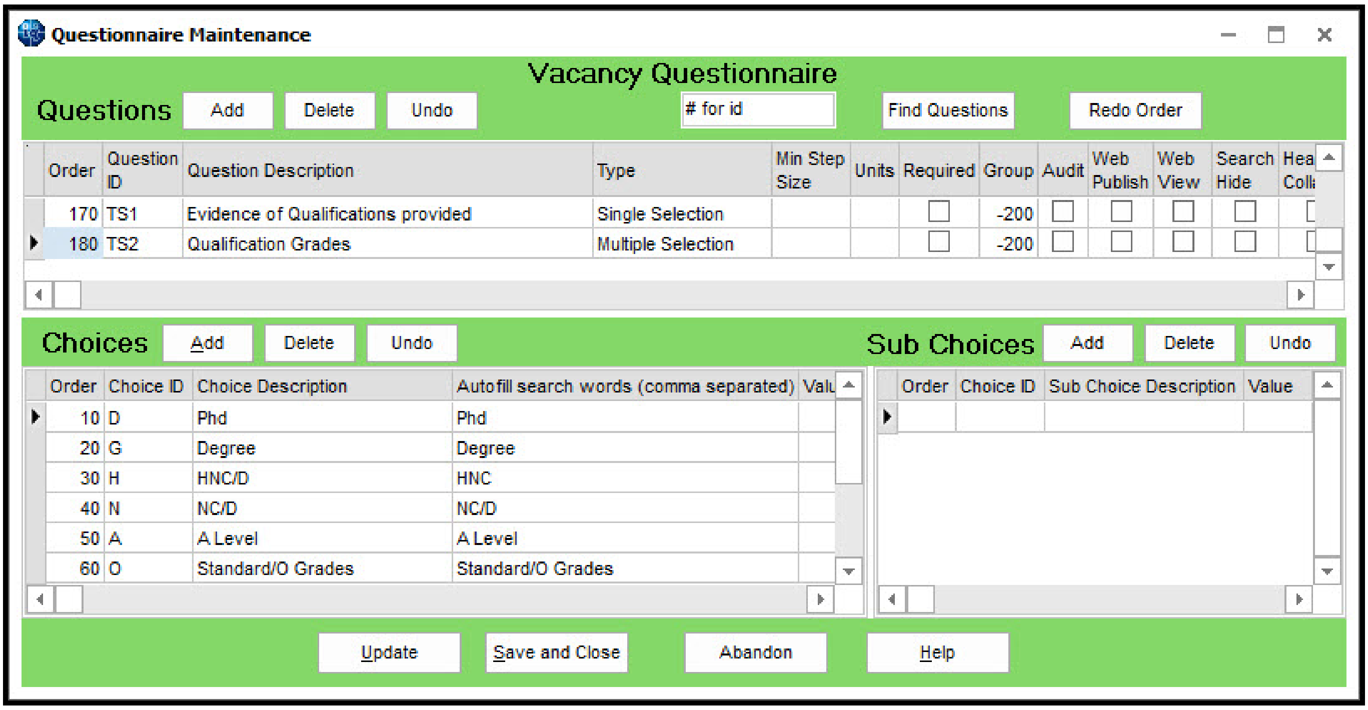
Access folder other than Inbox

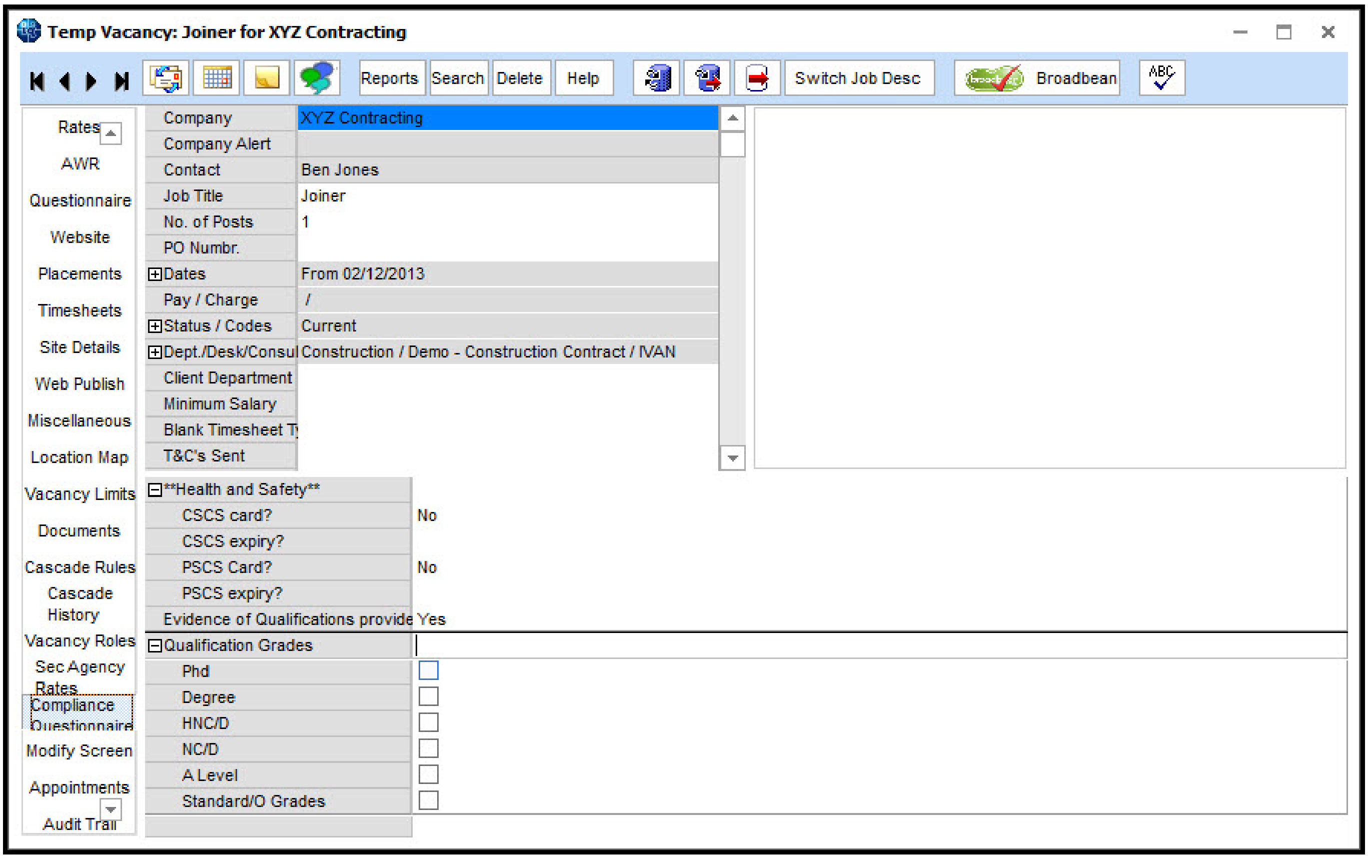
It is also now possible to select an alternative message store for displaying with IQX inbox. For example, a group email store like admin@IQX.co.uk can be set to populate the user's inbox.

Vacancy. Compliance Questions view added

Compliance questions can now be added to the General and Department Vacancy Questionnaires and grouped using the -200 grouping.

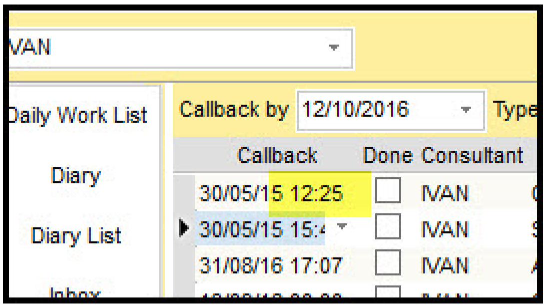






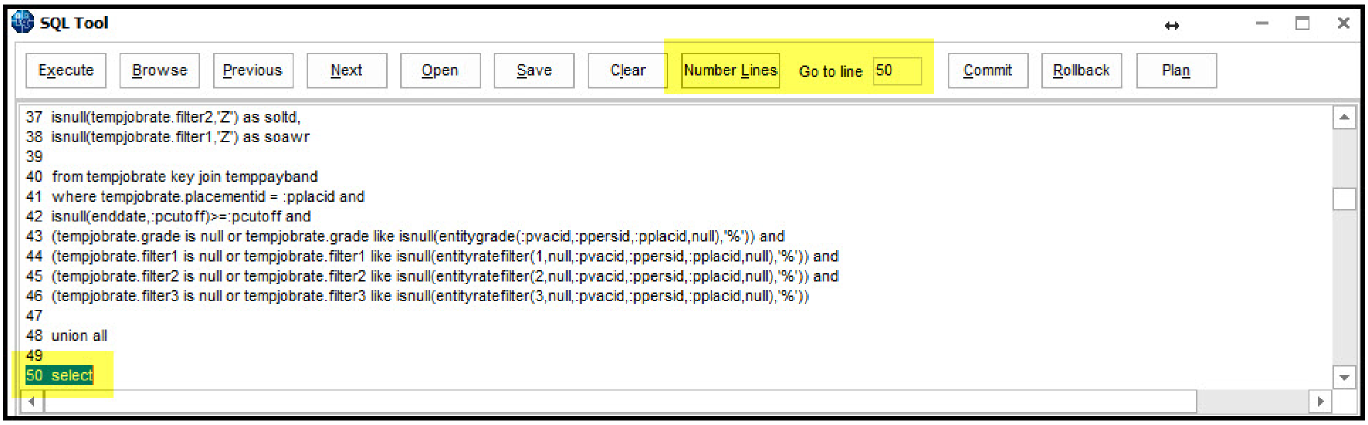
Desktop, CE due for callback. Time added to callback column

In Desktop – Contact event time has been added to the callback column.



SQLTool. Line numbering and go to line added

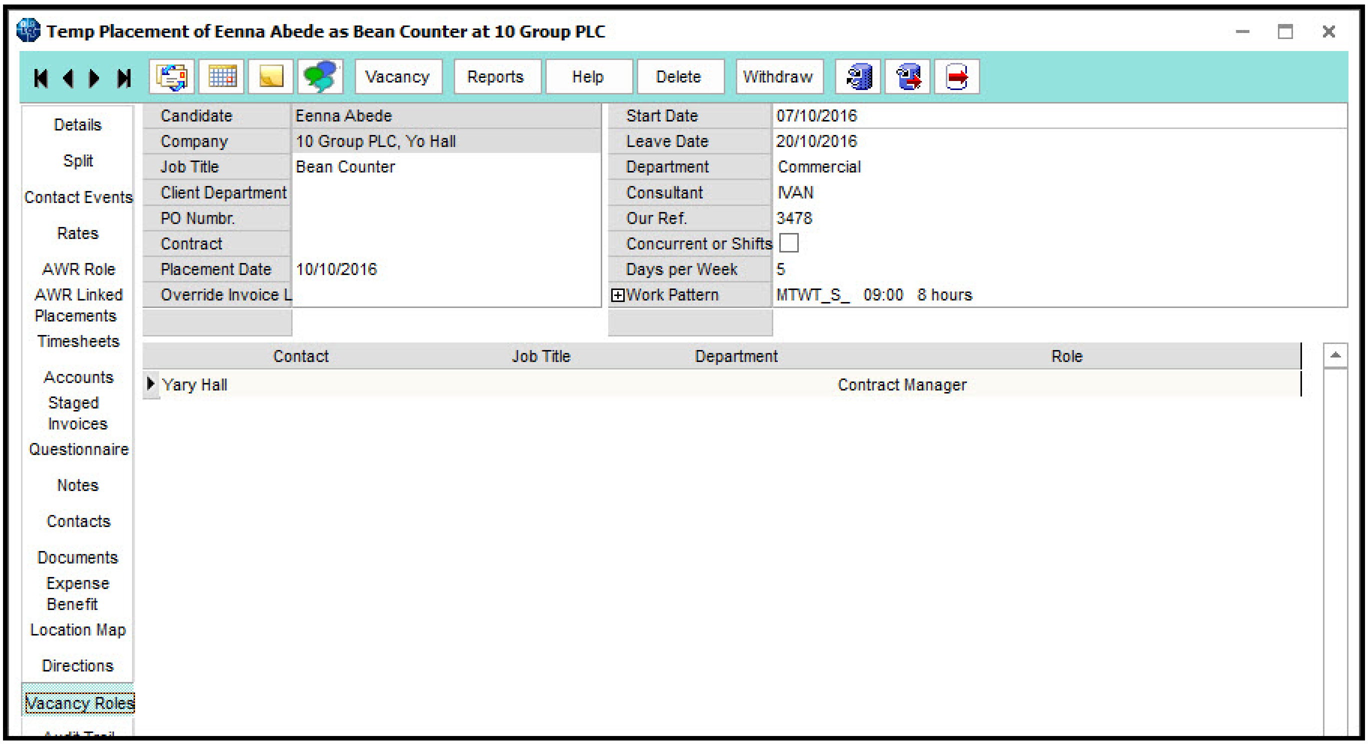
In Maintenance – SQL Tool line numbering and a ‘go to line number’ sections have been added.



In addition, pressing Ctrl + A acts as a shortcut to select all SQL.

Placement. Read-only vacancy roles view added

Users can now view contacts with roles within Placement – Vacancy Roles as Read Only so that if a contact does not have the appropriate role it can be added Vacancy – Vacancy Roles.



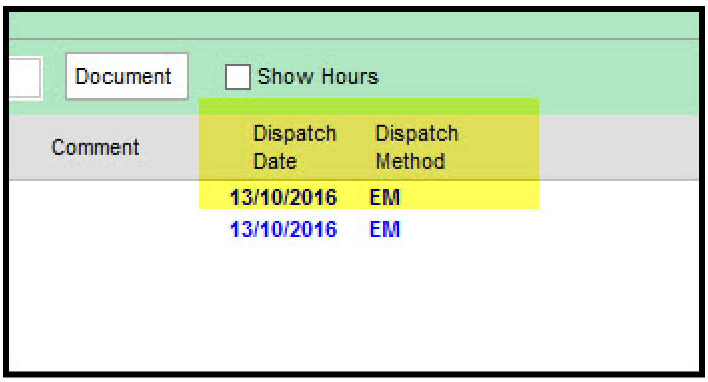
Option on changing Placement Leave date to offer to change Vacancy end date

When changing a contract desk placement leave date IQX will also offer to change the vacancy end date to keep the vacancy end date and placement leave date in sync.

In addition, a user is offered the opportunity to Set the Vacancy to filled.

Tempdesk – Timesheets – Clear All Dispatch Details

In temp Desk – Timesheets to new columns are been added which sure dispatch date and dispatch method. Right click on the column headings 'Dispatch Date ' or 'Dispatch Method 'will allow a user to clear either one or all dispatch details.

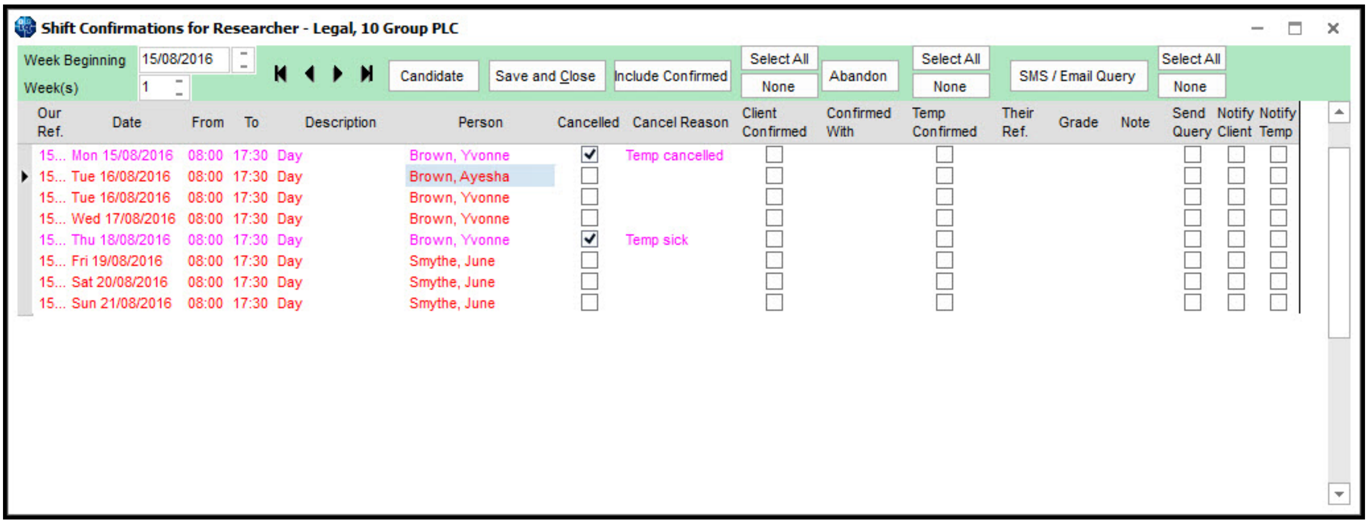


Notifications

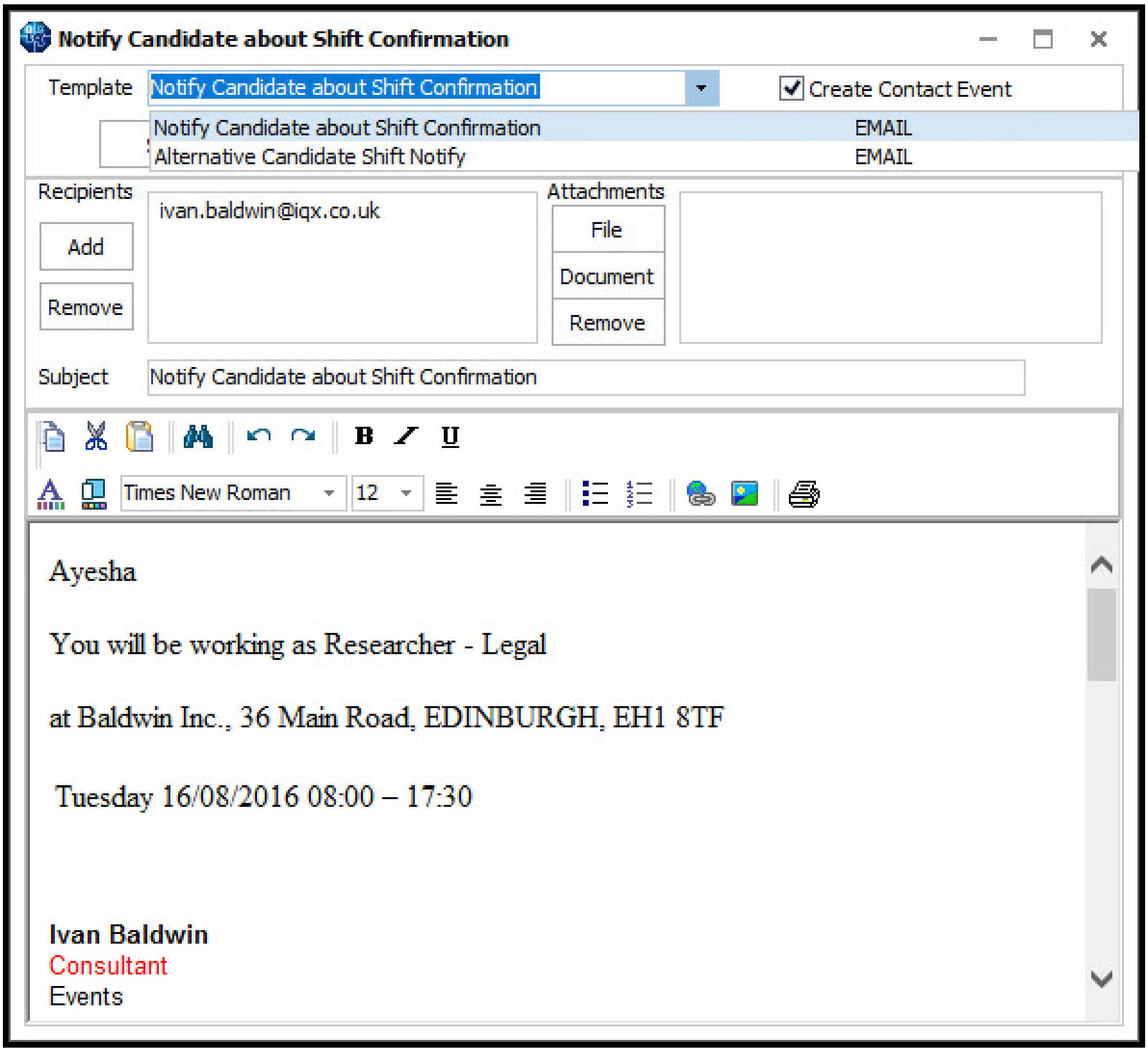
An alternative to Branding is being developed to improve notification workflow. A robust system for shift notifications is the first stage of this process.

This change affects Shift Match/Book and Shift Confirmations.

In shift confirmations tick boxes on the right hand side of the view allow the user to to notify client and/or temp for shift confirmations and cancellations.



On clicking save and close a new window opens for each notification.



Each shift confirmation email or SMS allows the selection of available templates; creation of a contact event; additional removal of recipients; inclusion of attachments and the ability to edit the email/SMS prior to sending. The refresh button allows the user to remove any changes made. The expand button enables the user to open records related to the email e.g. company, vacancy etc.

In Shift Match/Book the procedure is the same as above.

IQX is available to give assistance with setting up this functionality.

Add function to configure Alert in Expiry Date view

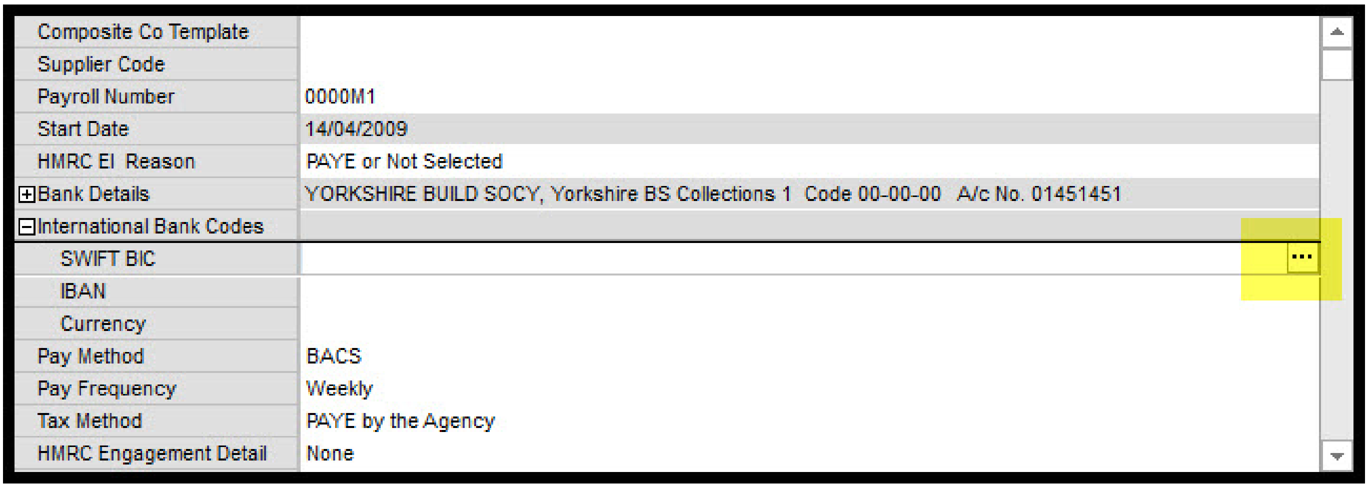
Additional information can be added to the alert column in expiry date.

Information is displayed in the alert column at Temp Desk – Expiry Dates.

This requires System Administrator set up.

Person, Payroll. Checkers for IBAN and Swift on ellipses

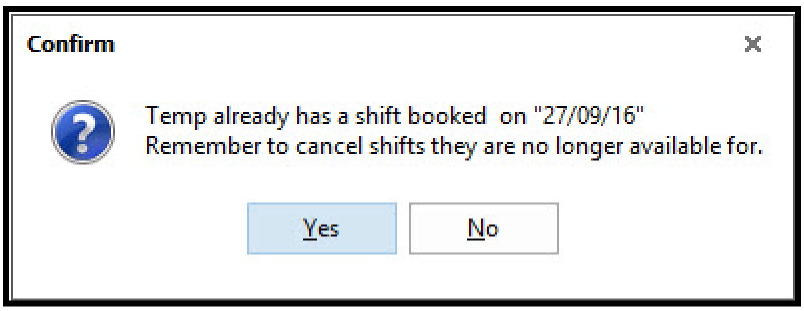
In Person – Payroll - checkers for IBAN and Swift banking numbers have been added as ellipses at the end of both fields. These ellipses take the user to websites where IBAN and Swift numbers can be verified.



This requires System Administrator setup.

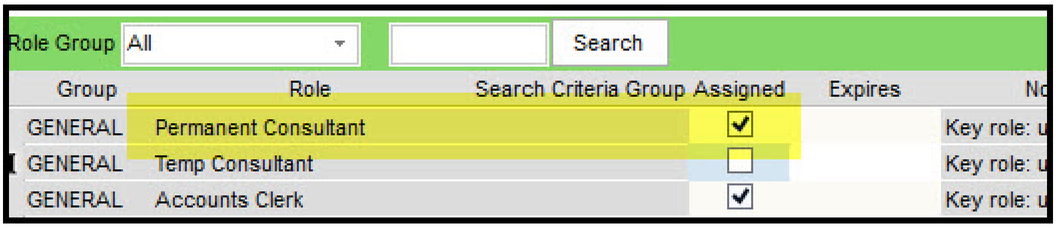
Flag or warn when entering unavailability entered and the temp is already booked for work

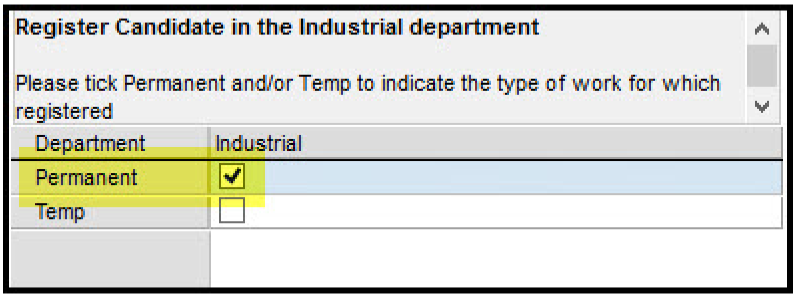
When a candidate has been booked for a shift and a user attempts to add unavailability in Person – Diary a warning message appears reminding the user that the candidate has previously been booked. This feature does not stop the addition of unavailability, it only serves to warn the user.



Person, New and Register. New Department has temp/perm pre-ticked from user roles

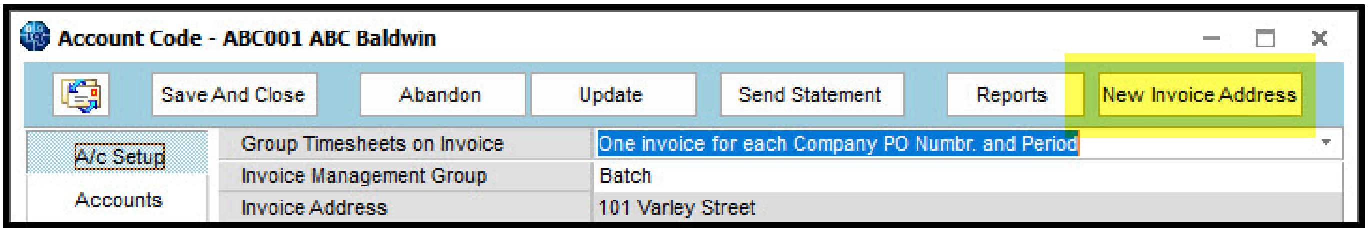
When registering an existing candidate to a new department or adding a new candidate the temp/perm tick boxes will be pre-ticked according to the user's role.





Button to Add Invoice Address to Account Code form

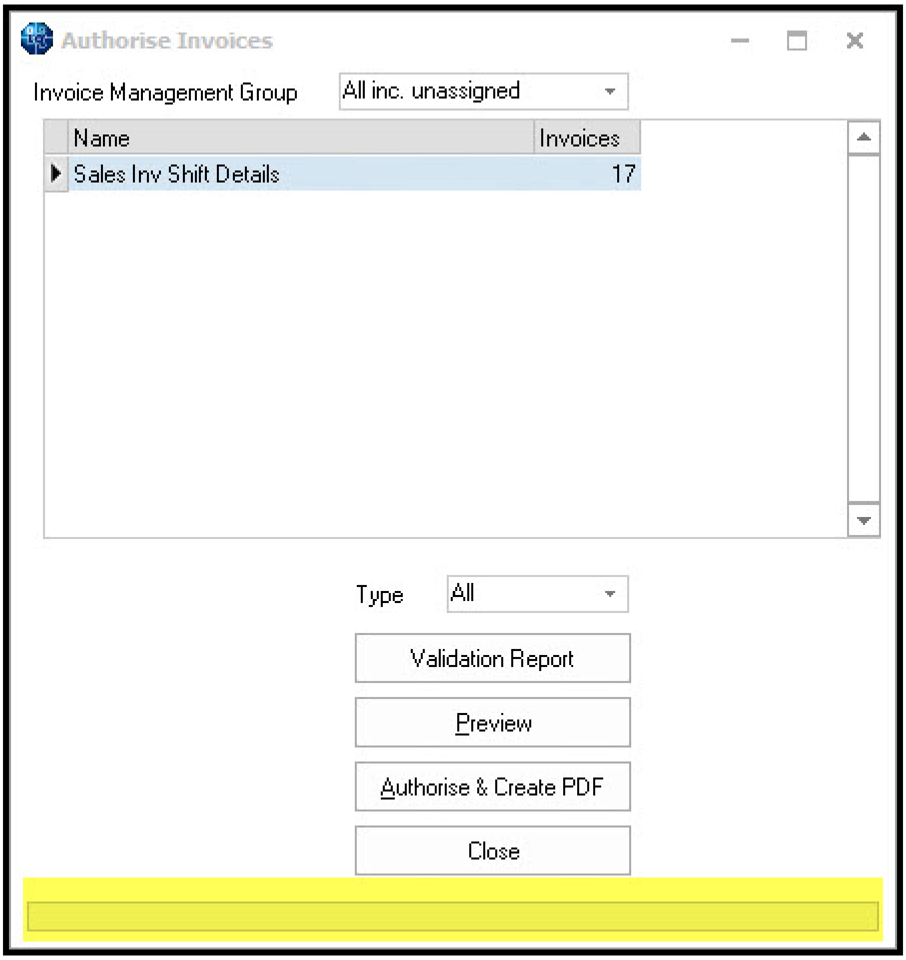
A new button has been added in Company – Accounts which allows the user to add a new invoice address.



Once the following form has been completed all invoices for members of the company group will be sent to this invoice address.

Dialogue Box for Authorising Invoices

In Accounts – Authorise Invoices once the Authorise and Create PDF button has been pressed progress is displayed via the progress bar at the bottom of the window.



System Administrator

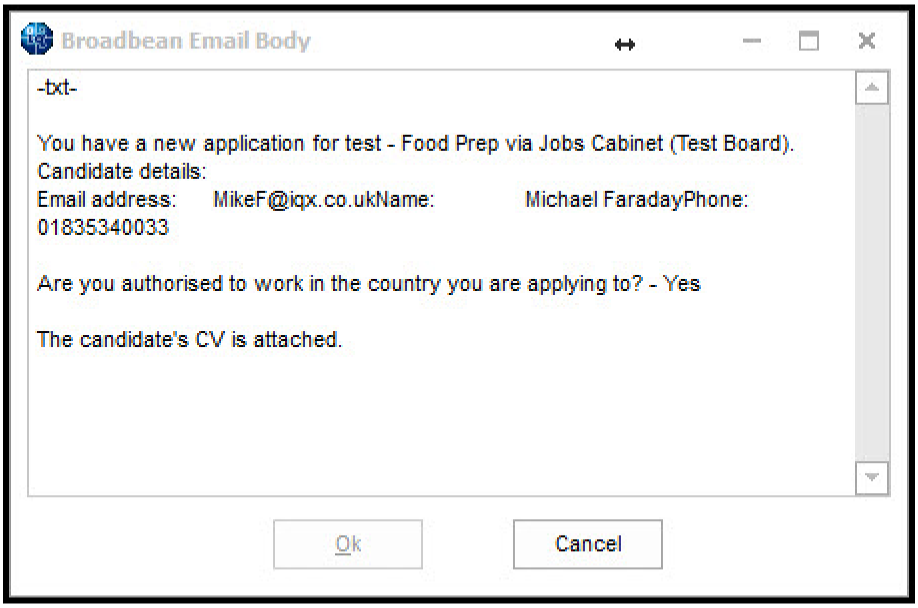
Broadbean - Switchable Job description/Vacancy Notes

A new switch has been added to IQX which allows either the Vacancy Job Description or Vacancy Notes to be added to Broadbean advert.

This is set up in Maintenance – General Settings – Settings 643.

Broadbean Email Body Text saved in IQX

The source of the application and email body text is now visible in the Import Candidate and add to Shortlist view. The email body text is stored as a contact event in the candidate record.



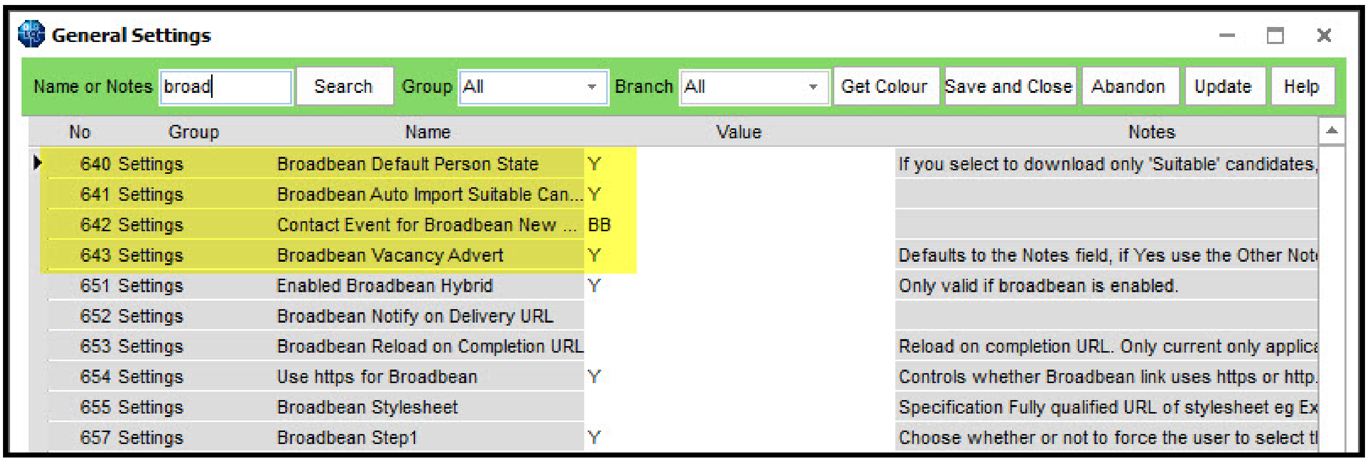
To save the text as a Contact Event a new contact event code can be set up in Maintenance – Agency Set up – Contact Event Types. A contact event code must be inserted in Maintenance – General Settings – Settings 642.

Semi-automatic import of Suitable candidates

Where Broadbean has ranked CVs outside IQX, ‘Suitable’ candidates can now be semi-automatically imported into IQX. When users press the Retrieve Candidates button, the Import Candidate And Add to Shortlist view is automatically called for each new 'Suitable' Candidate.

Where there are potential duplicate candidates that are Duplicate Candidate window will be displayed.

This is set up in Maintenance-General Settings – Settings 640 and 641.



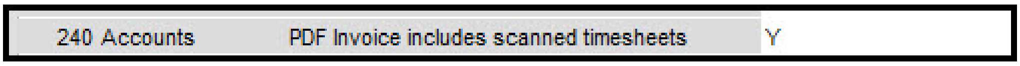
Increase BroadbeanCandidate filename field size

Some candidates may submit CV's with a document title up to 100 characters in length. Broadbean and IQX is able to add long CV documents to the database.

Invoicing, attaching timesheets. If general setting is on can turn off at company

When invoicing, the choice of NOT sending linked timesheets with an invoice can be set at global and account level.

The global setting to not include linked timesheets is Maintenance – General Settings – Accounts 240.

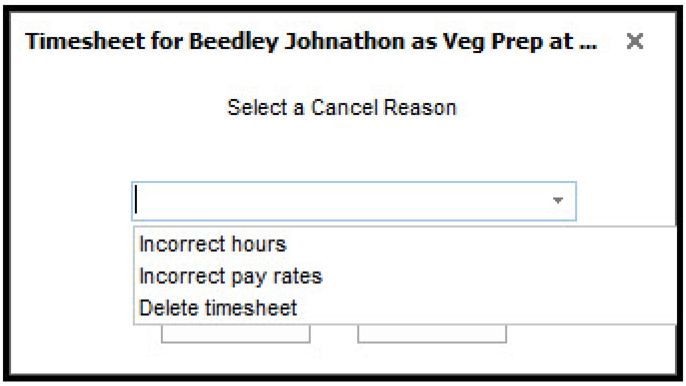


Local setting is in Company – Accounts – Invoice PDF exclude timesheets.

Generally, local settings override global settings.

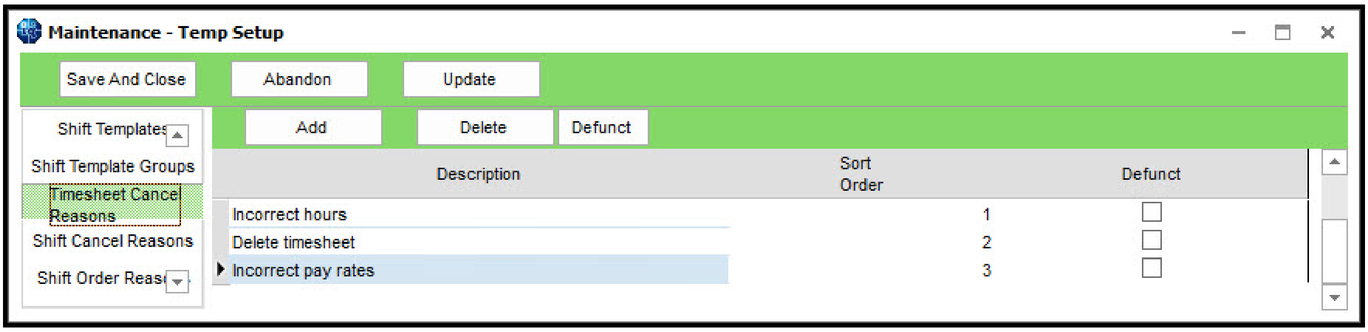
Timesheet. Cancel reasons can be used

The timesheet Cancel or Correct process has been enhanced by the inclusion of a drop-down list of previously set up reasons e.g. rates, client, hours, breaks.



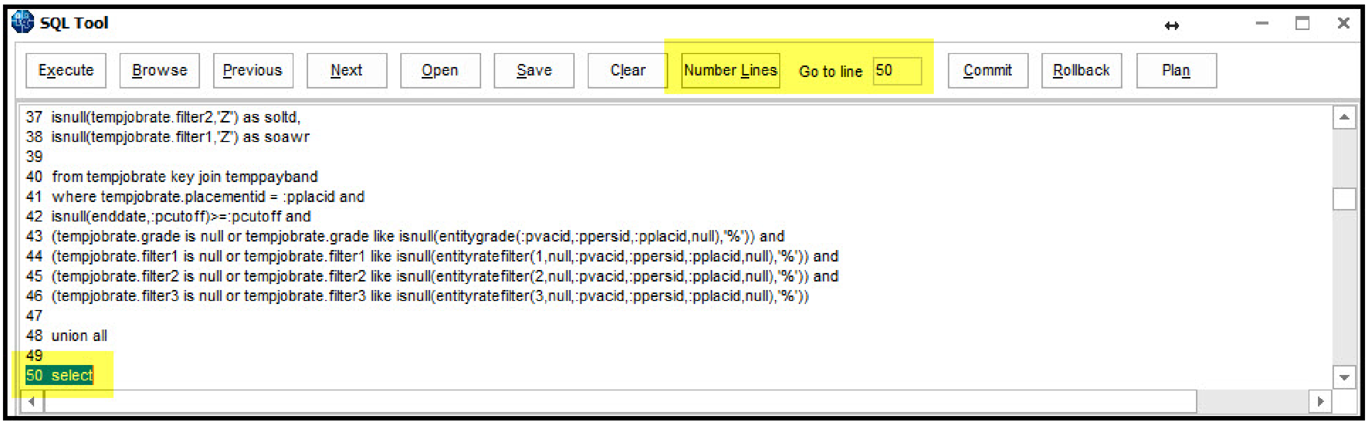
The reasons will appear on both the cancelled and amended timesheets.

Reasons can be set up in Maintenance - Temp Setup - Timesheet Cancel Reasons.



SQLTool. Line numbering and go to line added

In Maintenance – SQL Tool line numbering and a 'go to line number' sections have been added.



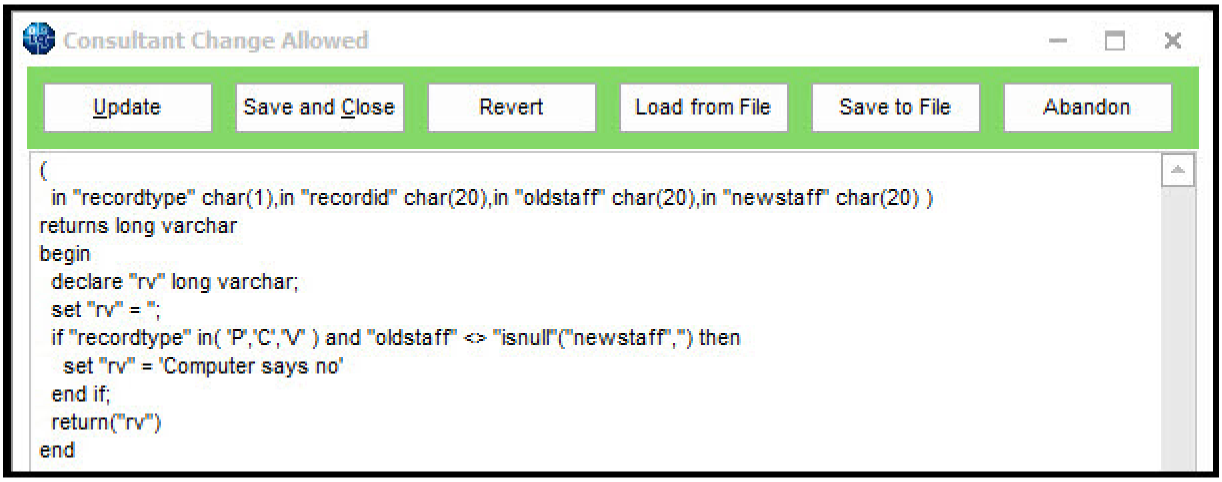
In addition, pressing Ctrl + A acts as a shortcut to select all SQL.

Validation function for consultant change on major records

A new function has been added which enables a System Administrator to stop changes to the consultant field in major records.

This function can be inserted in Maintenance – Database Functions – Change Functions – Consultant Change.

Below is an example of a validation function which validates a change in consultant.



Validation functions can open forms with specified views

New parameter has been added which allows validation functions to open up forms with specified views.

For example: set “rv” = '^P'“persid”'»PAYROLL'“char(9)”'This temp has no NI number. Please enter this immediately' will open up the person form with the payroll view open for the user to complete the temp’s national insurance number.

```
The format is:   [^][{P|C|E|L| I|T|V}id][>>view][<TAB>message]
This applies to validations returning P,C,E,L and V only.
```

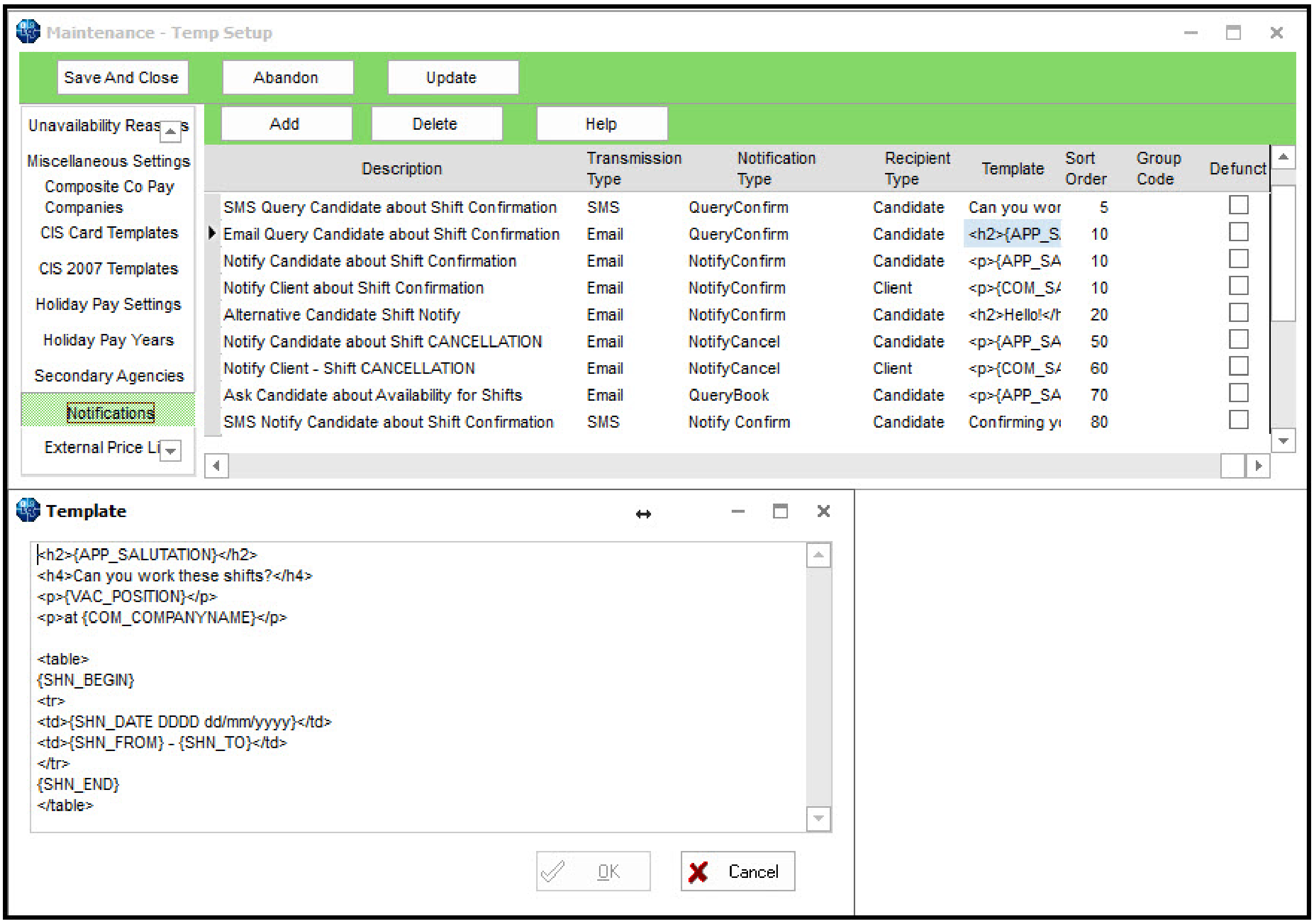
If a view doesn't exist or cannot be selected it will open with the first view.

Notifications

An alternative to Branding is being developed to improve notification workflow. A robust system for shift notifications is the first stage of this process.

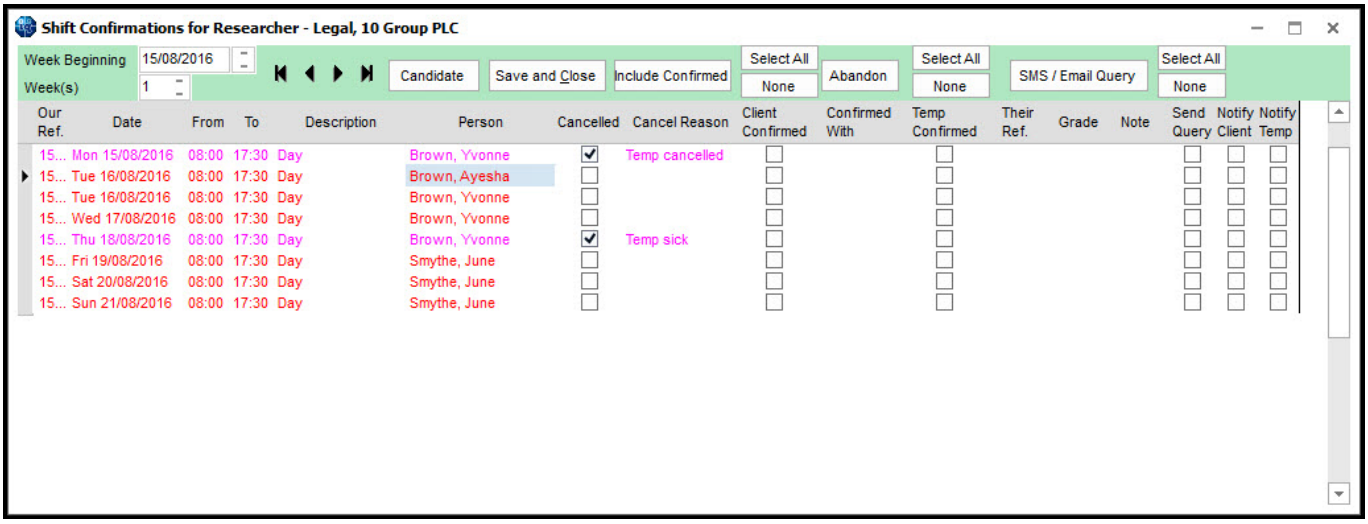
But Notification templates are set up in Maintenance – Temp Setup – Notifications. Here templates can be set up according to transmission type, notification type, recipient type and template.

Below is an example of a template for email query candidate about shift confirmation. Boilerplate text codes can be used in the templates as well as HTML emails.

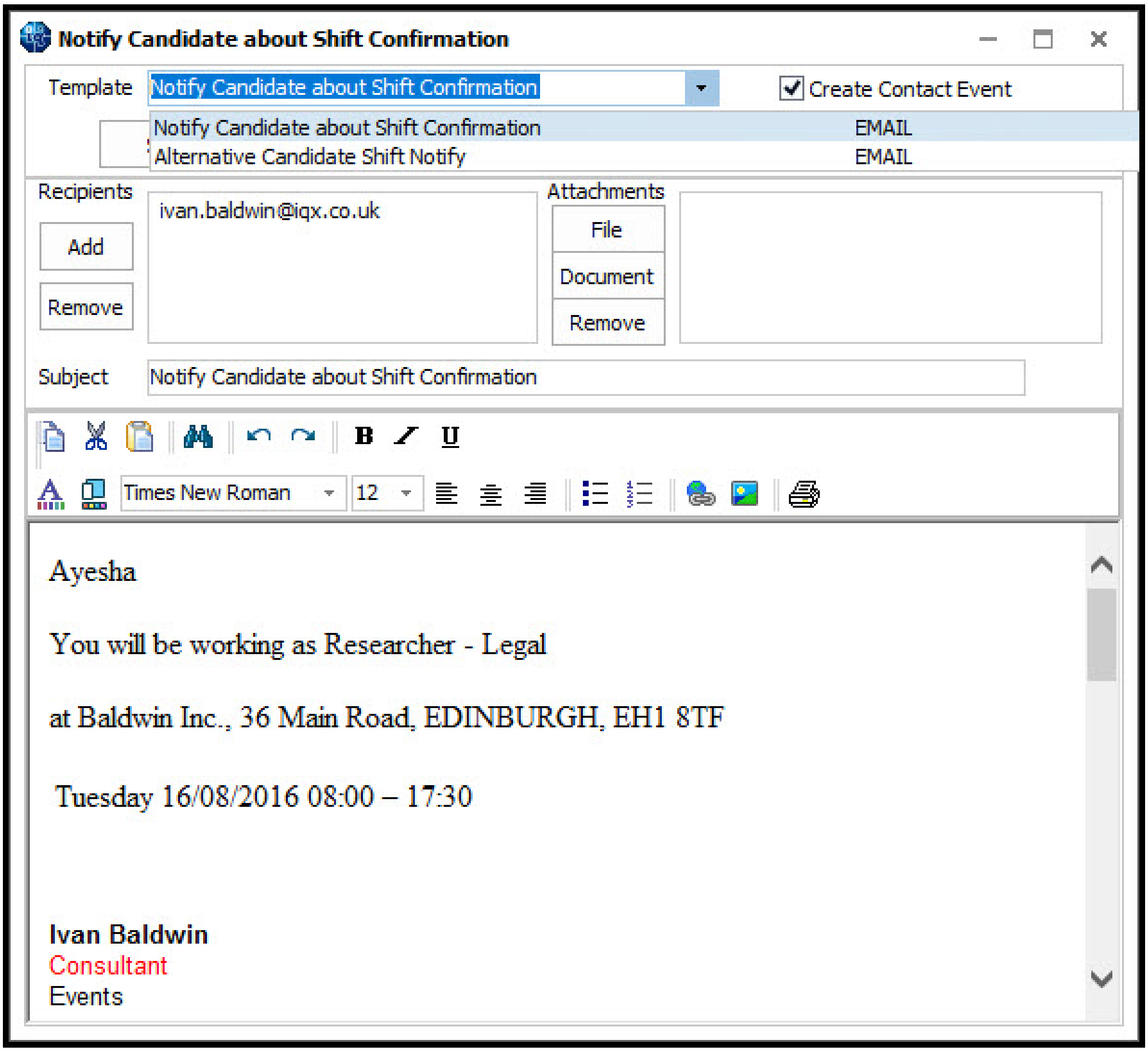


The templates are available to be used in Shift Match/Book and Shift Confirmations.

In shift confirmations tick boxes on the right hand side of the view allow the user to to notify client and/or temp for shift confirmations and cancellations.



On clicking save and close a new window opens for each notification.



Each shift confirmation email or SMS allows the selection of available templates; creation of a contact event; additional removal of recipients; inclusion of attachments and the ability to edit the email/SMS prior to sending. The refresh button allows the user to remove any changes made. The expand button enables the user to open records related to the email e.g. company, vacancy etc.

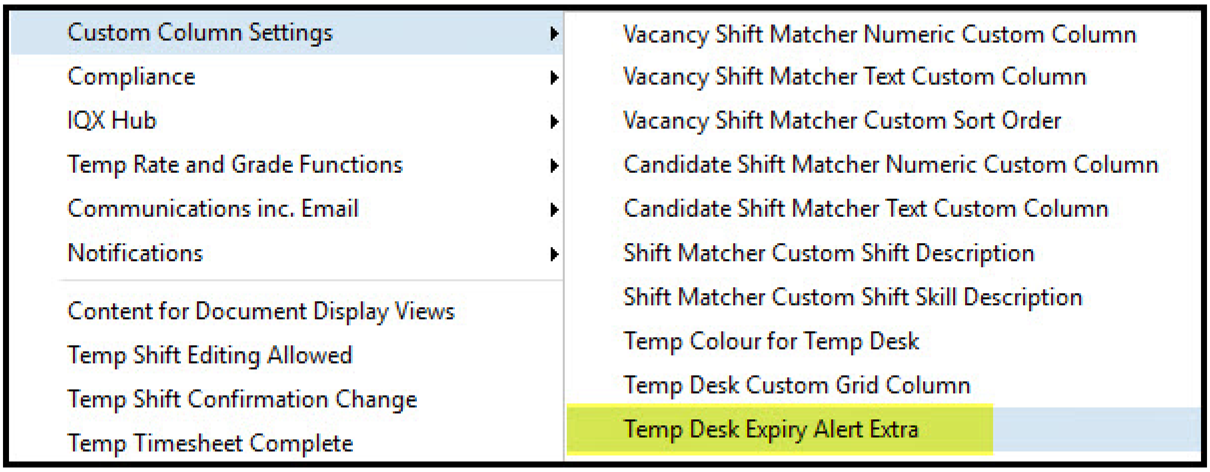
In Shift Match/Book the procedure is the same as above.

IQX is available to give assistance with setting up this functionality.

Add function to configure Alert in Expiry Date view

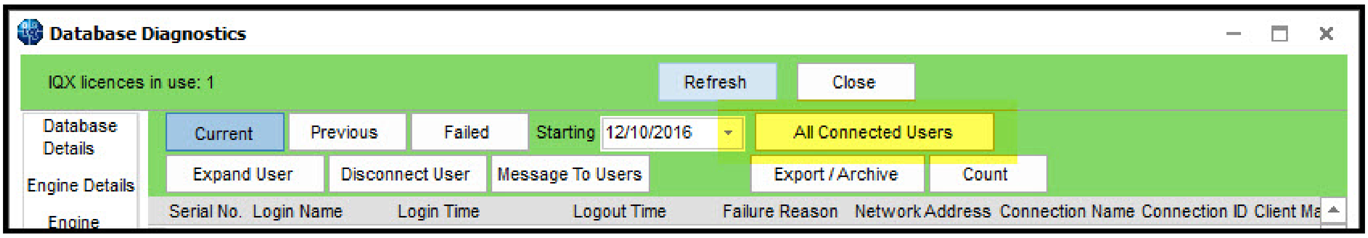
Additional information can be added to the alert column in expiry date by creating a function in Maintenance – Database Functions – Custom Column Settings – temp desk expiry and alert extra.

Information is displayed in the alert column at Temp Desk – Expiry Dates.



Maintenance, Database Diagnostics, Connections. All connected users button added

In Maintenance – Database Diagnostics – Connections there is now a button which allows the display of all connected users.

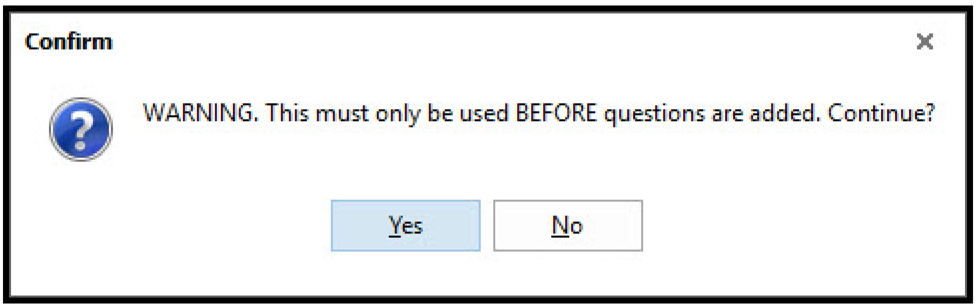


Maintenance, Document Types. Add and Remove Buttons added

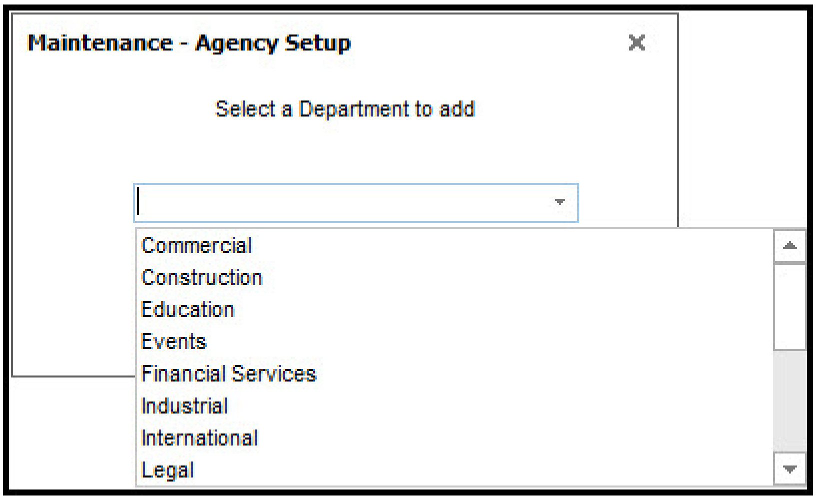
In Maintenance – Agency setup – Document types three new buttons have been inserted, (Initial Departments, Add Department and Remove Department).

These buttons only work where the document type has compliance ticked against it.

A warning message will appear if initial departments is selected informing the user that setting initial departments must be done before questions are added.

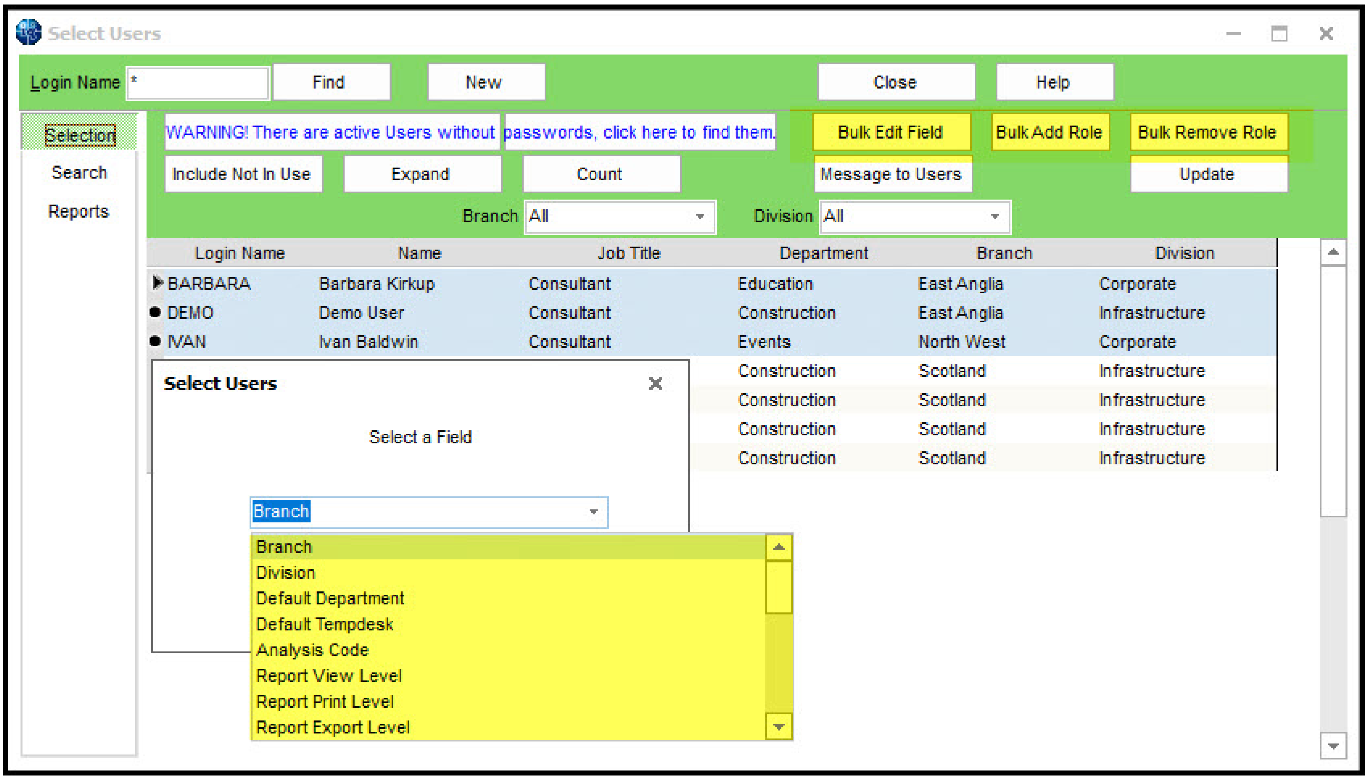


Add and Remove Department buttons give the user the option to select the Department to add or remove.



Bulk allocate or unassign roles/report level/inbox/ to multiple users

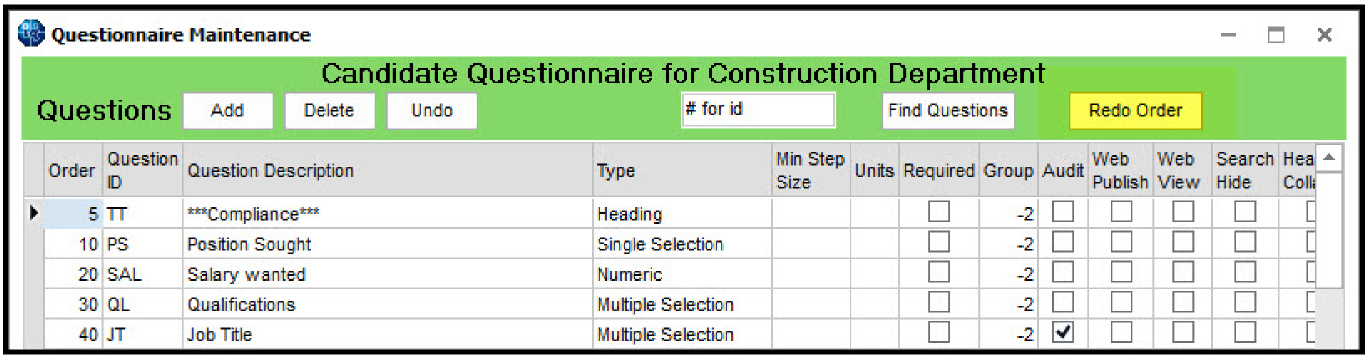
Three new buttons have been added to Maintenance – Users which allow a System Administrator to allocate, or assign, report levels and in boxes to multiple users. To use this function select users you require to make the global change to and select the fields you wish to change.



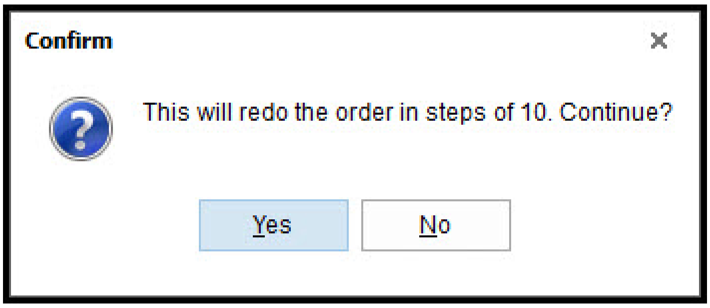
Likewise, to add or remove a role users and click add role or remove role as appropriate and select the required role and complete the questions.

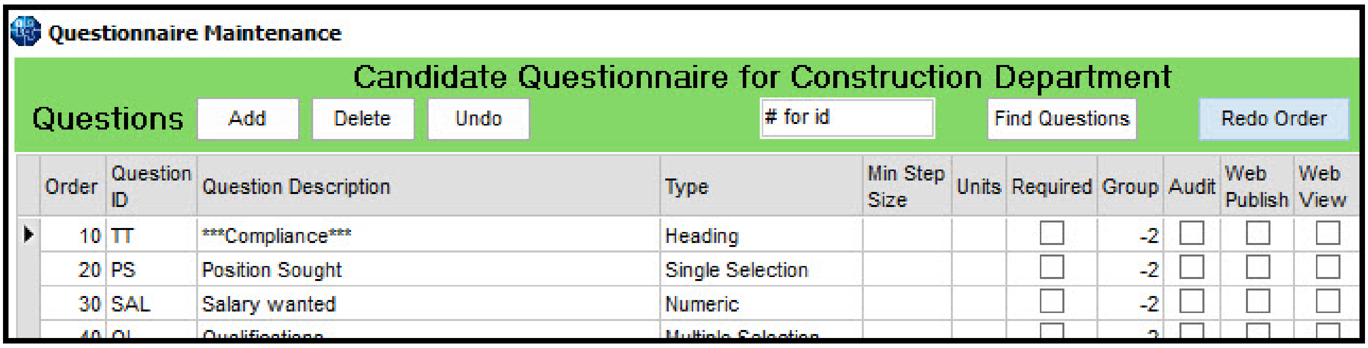
Changing sort order on Questionnaire

In Maintenance – Agency Setup – Departments – Questionnaires and Maintenance-Questionnaires and new button has been added Redo Order.



Once pressed this button will rearrange the order of each question to provide gaps between each question for additional related questions.





Person, Payroll. Checkers for IBAN and Swift on ellipses

In Person – Payroll - checkers for IBAN and Swift banking numbers have been added as ellipses at the end of both fields. These ellipses take the user to websites where IBAN and Swift numbers can be verified.

Composite Co Template	
Supplier Code	
Payroll Number	0000M1
Start Date	14/04/2009
HMRC EI Reason	PAYE or Not Selected
⊞Bank Details	YORKSHIRE BUILD SOCY, Yorkshire BS Collections 1 Code 00-00-00 A/c No. 01451451
⊟International Bank Codes	
SWIFT BIC	...
IBAN	
Currency	
Pay Method	BACS
Pay Frequency	Weekly
Tax Method	PAYE by the Agency
HMRC Engagement Detail	None

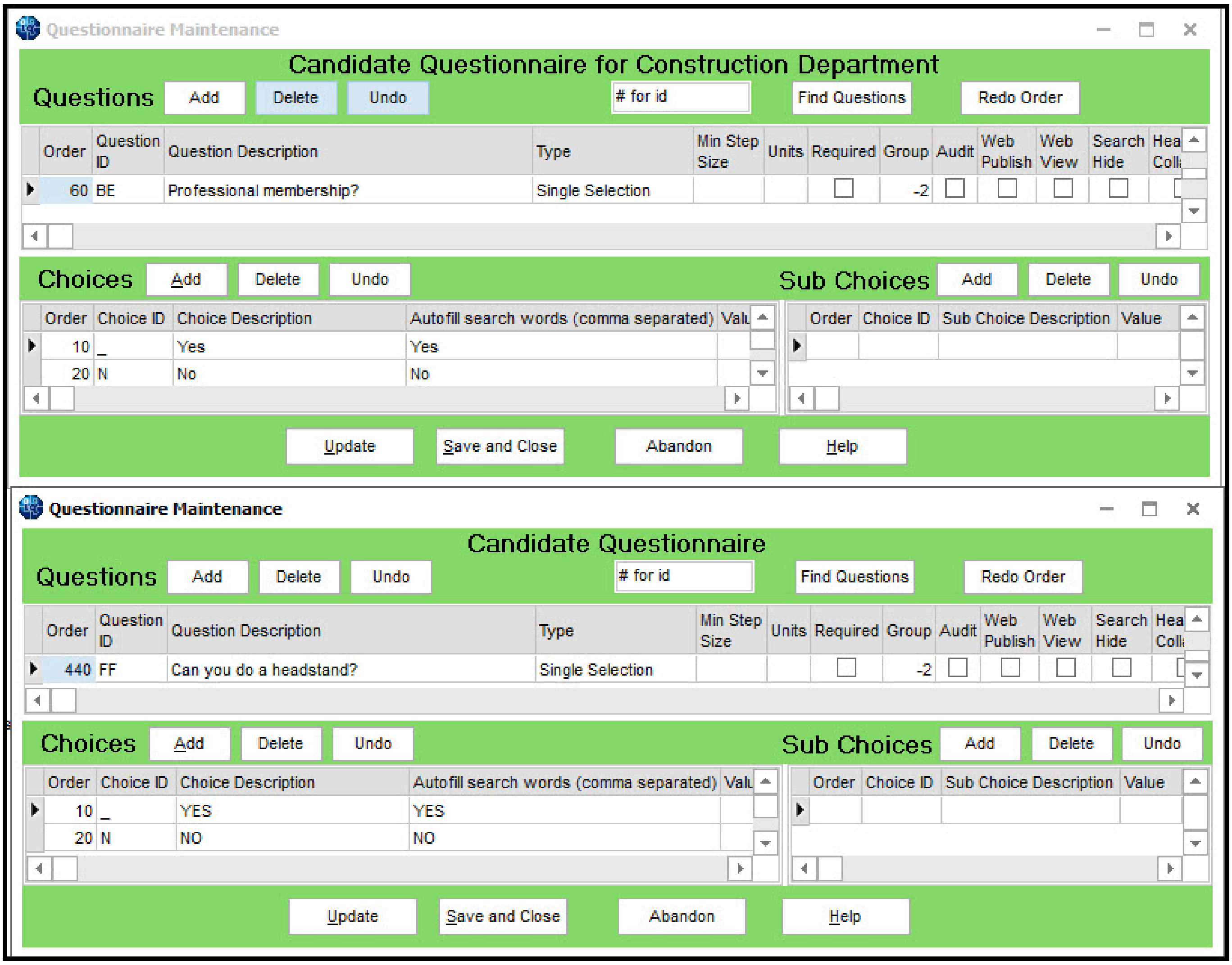
Viewing international bank codes in IQX is set up in Maintenance – General Settings – Switchable Fields 1010.

1010 Switchable Fields	Show International Bank Codes	Y

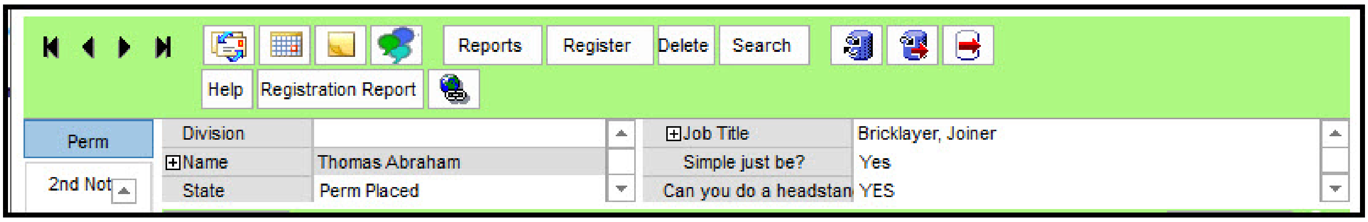
Person. -2 group questions editable by clearance on headline and questionnaire

In in person record it is now possible to display questions in the top right hand view which are editable if the user has compliance rights set up.

Questions set up in departmental or general questionnaires need to be grouped using -2 for them to be displayed and editable in this manner.



-2 group questions are displayed at the bottom of the window.



Woodpecker Script BROWSERCURRURL added

The new parameter BROWSERCURRURL has been added allowing the creation of a button which reports the current browser URL. This information can be used when writing/drafting reports.

Ability to see account information for orphaned account codes

where an account code has become of linked from a company it is now possible to see the account information and a list of the documents/payments etc. In accounts setup – accounts and for sales ledger IDs clicking the document button will display company, accounts for linked accounts or a list of documents for unlinked accounts.