



# Release 2.16.10

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.

- [User](#)
- [System Administrator](#)
- [Fixes and Enhancements](#)

## 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.

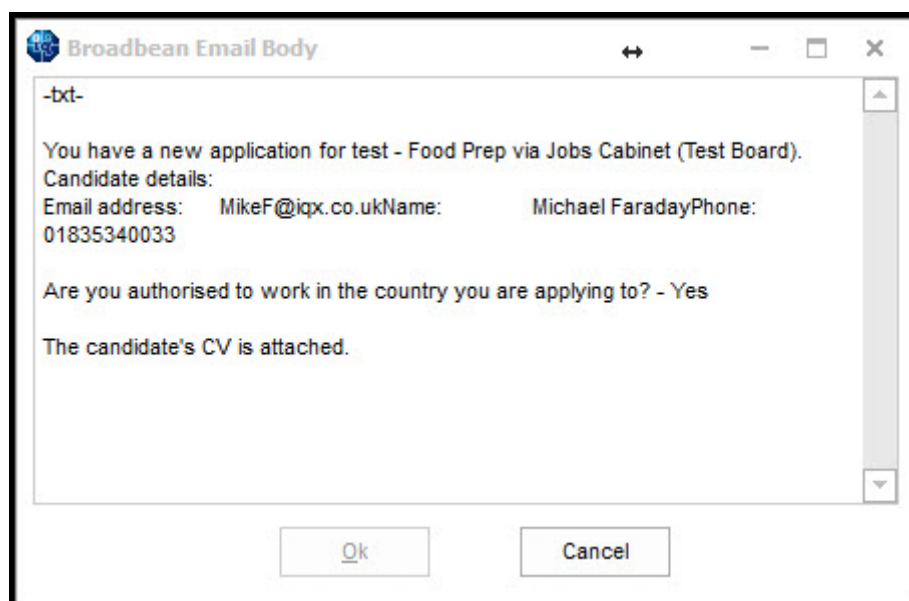
This requires System Administrator set up.

### 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.

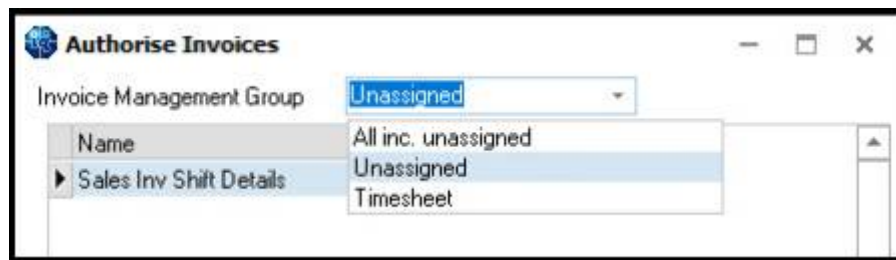
Where there are potential duplicate candidates that are Duplicate Candidate window will be displayed.

A screenshot of the 'Add Person' dialog box in the IQX system. The dialog has a light green background and a title bar with a close button. It contains several input fields for personal and contact information: Surname (Faraday), Forenames (Michael), Full Name (Michael Faraday), Salutation (MICHAEL), Keyname (FARADAY MICHAEL), Email (MikeF@iqx.co.uk), Mobile (empty), Home Phone (01835340033), and Work Phone (empty). Below these is a section for address and other details: Address (Gauss Road, Canterbury, Kent, CT9 9ZZ), State (Client), Source (a dropdown menu), and a button labeled 'Broadbean Email Body'. At the bottom, there is a Division dropdown menu set to 'International', a Notes text area, and three buttons: 'Ok', 'Cancel', and 'Help'.

This requires System Administrator set up.

## Invoice management Group option of unassigned added

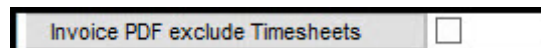
In Invoice Temp Timesheets, Authorise Invoices and Send invoices the option to select and view unassigned timesheets has been added.



## 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.

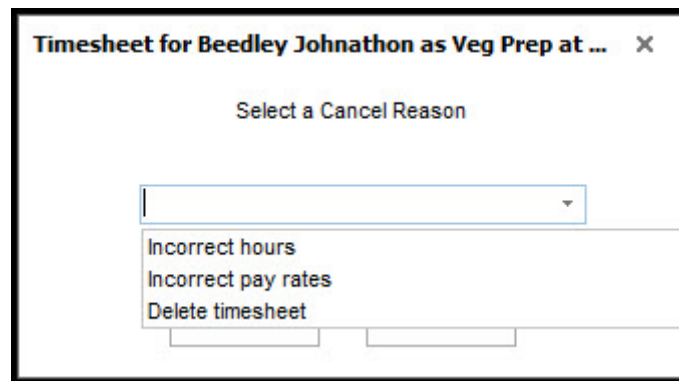
| L | Number | Period | Payroll No. | Temp        | Company            | Position | Comment | ScanPathFilename |
|---|--------|--------|-------------|-------------|--------------------|----------|---------|------------------|
| U | 4604   | 201622 | 50171       | Paul, Smith | Hawkins Brown Ltd. | Driver   |         |                  |

## 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.

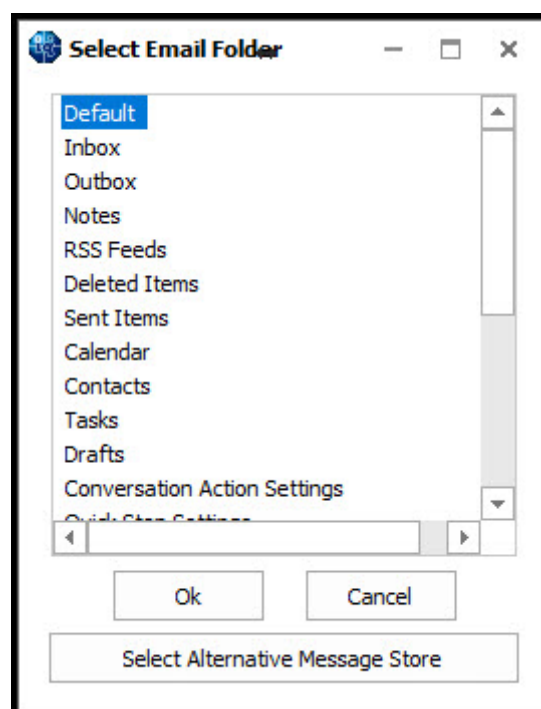
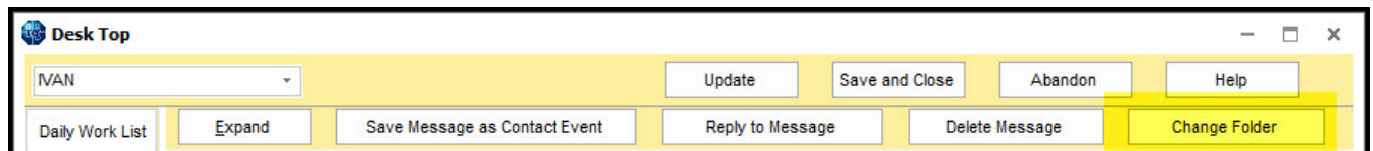
This requires System Administrator set up.

## **Timesheet, Cancel/Correct. Block contra, improve workflow**

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

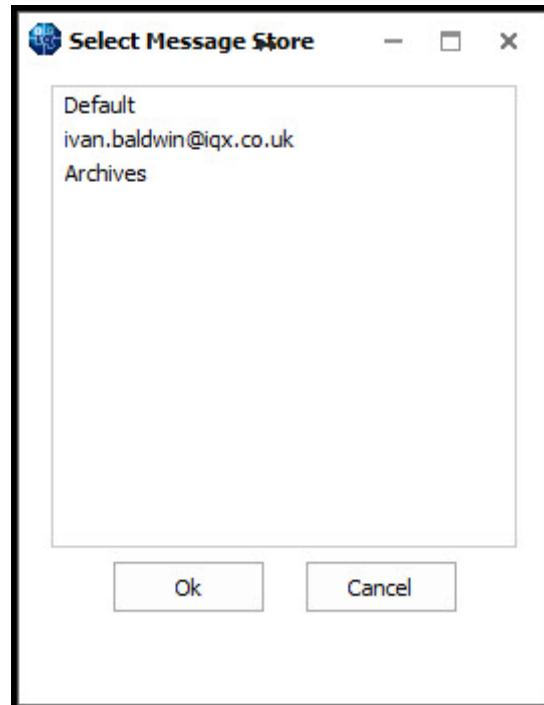
## **Access message store other than default**

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.



**Questionnaire Maintenance**

### Vacancy Questionnaire for Construction Department

**Questions** Add Delete Undo # for id Find Questions Redo Order

| Order | Question ID | Question Description  | Type             | Min Step Size | Units | Required                 | Group | Audit                    | Web Publish              | Web View                 | Search Hide              | Head Coll                |
|-------|-------------|-----------------------|------------------|---------------|-------|--------------------------|-------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 5     | 2           | **Health and Safety** | Heading          |               |       | <input type="checkbox"/> | -200  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10    | 1           | CSCS card?            | Single Selection |               |       | <input type="checkbox"/> | -200  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15    | 4           | CSCS expiry?          | Date             |               |       | <input type="checkbox"/> | -200  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 20    | 3           | PSCS Card?            | Single Selection |               |       | <input type="checkbox"/> | -200  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Choices** Add Delete Undo **Sub Choices** Add Delete Undo

| Order | Choice ID | Choice Description | Autofill search words (comma separated) | Value |
|-------|-----------|--------------------|-----------------------------------------|-------|
| 10    | _         | No                 | No                                      |       |
| 20    | Y         | Yes                | Yes                                     |       |

| Order | Choice ID | Sub Choice Description | Value |
|-------|-----------|------------------------|-------|
|-------|-----------|------------------------|-------|

Update Save and Close Abandon Help

**Questionnaire Maintenance**

### Vacancy Questionnaire

**Questions** Add Delete Undo # for id Find Questions Redo Order

| Order | Question ID | Question Description                | Type               | Min Step Size | Units | Required                 | Group | Audit                    | Web Publish              | Web View                 | Search Hide              | Head Coll                |
|-------|-------------|-------------------------------------|--------------------|---------------|-------|--------------------------|-------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 170   | TS1         | Evidence of Qualifications provided | Single Selection   |               |       | <input type="checkbox"/> | -200  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 180   | TS2         | Qualification Grades                | Multiple Selection |               |       | <input type="checkbox"/> | -200  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Choices** Add Delete Undo **Sub Choices** Add Delete Undo

| Order | Choice ID | Choice Description | Autofill search words (comma separated) | Value |
|-------|-----------|--------------------|-----------------------------------------|-------|
| 10    | D         | Phd                | Phd                                     |       |
| 20    | G         | Degree             | Degree                                  |       |
| 30    | H         | HNC/D              | HNC                                     |       |
| 40    | N         | NC/D               | NC/D                                    |       |
| 50    | A         | A Level            | A Level                                 |       |
| 60    | O         | Standard/O Grades  | Standard/O Grades                       |       |

| Order | Choice ID | Sub Choice Description | Value |
|-------|-----------|------------------------|-------|
|-------|-----------|------------------------|-------|

Update Save and Close Abandon Help



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

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

| Callback by    | Done                     | Consultant |
|----------------|--------------------------|------------|
| 30/05/15 12:25 | <input type="checkbox"/> | IVAN       |
| 30/05/15 15:4  | <input type="checkbox"/> | IVAN       |
| 31/08/16 17:07 | <input type="checkbox"/> | IVAN       |

## SQLTool. Line numbering and go to line added

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



The screenshot shows the SQL Tool interface. The top toolbar includes buttons for Execute, Browse, Previous, Next, Open, Save, Clear, Number Lines, Go to line 50, Commit, Rollback, and Plan. The SQL query is displayed in a text area, and line 50, which contains the word 'select', is highlighted in yellow.

```
37 isnull(tempjobrate.filter2,'Z') as sold,  
38 isnull(tempjobrate.filter1,'Z') as soawr  
39  
40 from tempjobrate key join tempjobband  
41 where tempjobrate.placementid = :pplacid and  
42 isnull(enddate,:pcutoff)>=:pcutoff and  
43 (tempjobrate.grade is null or tempjobrate.grade like isnull(entitygrade(:pvacid,:ppersid,:pplacid,null),'%')) and  
44 (tempjobrate.filter1 is null or tempjobrate.filter1 like isnull(entityratefilter(1,null,:pvacid,:ppersid,:pplacid,null),'%')) and  
45 (tempjobrate.filter2 is null or tempjobrate.filter2 like isnull(entityratefilter(2,null,:pvacid,:ppersid,:pplacid,null),'%')) and  
46 (tempjobrate.filter3 is null or tempjobrate.filter3 like isnull(entityratefilter(3,null,:pvacid,:ppersid,:pplacid,null),'%'))  
47  
48 union all  
49  
50 select
```

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

The screenshot shows the SQL Tool interface with the same SQL query as the previous image. In this image, the entire query text is highlighted in blue, indicating that the Ctrl + A shortcut was used to select all the content.

```
37 isnull(tempjobrate.filter2,'Z') as sold,  
38 isnull(tempjobrate.filter1,'Z') as soawr  
39  
40 from tempjobrate key join tempjobband  
41 where tempjobrate.placementid = :pplacid and  
42 isnull(enddate,:pcutoff)>=:pcutoff and  
43 (tempjobrate.grade is null or tempjobrate.grade like isnull(entitygrade(:pvacid,:ppersid,:pplacid,null),'%')) and  
44 (tempjobrate.filter1 is null or tempjobrate.filter1 like isnull(entityratefilter(1,null,:pvacid,:ppersid,:pplacid,null),'%')) and  
45 (tempjobrate.filter2 is null or tempjobrate.filter2 like isnull(entityratefilter(2,null,:pvacid,:ppersid,:pplacid,null),'%')) and  
46 (tempjobrate.filter3 is null or tempjobrate.filter3 like isnull(entityratefilter(3,null,:pvacid,:ppersid,:pplacid,null),'%'))  
47  
48 union all  
49  
50 select
```

## 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.



| Details               | Candidate          | Eenna Abede           | Start Date           | 07/10/2016               |
|-----------------------|--------------------|-----------------------|----------------------|--------------------------|
| Split                 | Company            | 10 Group PLC, Yo Hall | Leave Date           | 20/10/2016               |
| Contact Events        | Job Title          | Bean Counter          | Department           | Commercial               |
| Rates                 | Client Department  |                       | Consultant           | IVAN                     |
| AWR Role              | PO Numbr.          |                       | Our Ref.             | 3478                     |
| AWR Linked Placements | Contract           |                       | Concurrent or Shifts | <input type="checkbox"/> |
| Timesheets            | Placement Date     | 10/10/2016            | Days per Week        | 5                        |
| Accounts              | Override Invoice L |                       | Work Pattern         | MTWT_S_ 09:00 8 hours    |
| Staged Invoices       |                    |                       |                      |                          |
| Questionnaire         |                    |                       |                      |                          |
| Notes                 |                    |                       |                      |                          |
| Contacts              |                    |                       |                      |                          |
| Documents             |                    |                       |                      |                          |
| Expense               |                    |                       |                      |                          |
| Benefit               |                    |                       |                      |                          |
| Location Map          |                    |                       |                      |                          |
| Directions            |                    |                       |                      |                          |
| Vacancy Roles         |                    |                       |                      |                          |

| Contact   | Job Title | Department | Role             |
|-----------|-----------|------------|------------------|
| Yary Hall |           |            | Contract Manager |

## 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.

| Comment | Dispatch Date | Dispatch Method |
|---------|---------------|-----------------|
|         | 13/10/2016    | EM              |
|         | 13/10/2016    | EM              |

## 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.

| Shift Confirmations for Researcher - Legal, 10 Group PLC |                |            |       |             |               |                                     |                |                          |                |                          |            |                   |      |                          |                          |
|----------------------------------------------------------|----------------|------------|-------|-------------|---------------|-------------------------------------|----------------|--------------------------|----------------|--------------------------|------------|-------------------|------|--------------------------|--------------------------|
| Week Beginning                                           |                | 15/08/2016 |       |             |               |                                     |                | Candidate                |                | Save and Close           |            | Include Confirmed |      | Select All               |                          |
| Week(s)                                                  |                | 1          |       |             |               |                                     |                | None                     |                | Abandon                  |            | None              |      | SMS / Email Query        |                          |
|                                                          |                |            |       |             |               |                                     |                | None                     |                |                          |            |                   |      | None                     |                          |
| Our Ref.                                                 | Date           | From       | To    | Description | Person        | Cancelled                           | Cancel Reason  | Client Confirmed         | Confirmed With | Temp Confirmed           | Their Ref. | Grade             | Note | Send Query               | Notify Client            |
| 15...                                                    | Mon 15/08/2016 | 08:00      | 17:30 | Day         | Brown, Yvonne | <input checked="" type="checkbox"/> | Temp cancelled | <input type="checkbox"/> |                | <input type="checkbox"/> |            |                   |      | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...                                                    | Tue 16/08/2016 | 08:00      | 17:30 | Day         | Brown, Ayesha | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |                   |      | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...                                                    | Tue 16/08/2016 | 08:00      | 17:30 | Day         | Brown, Yvonne | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |                   |      | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...                                                    | Wed 17/08/2016 | 08:00      | 17:30 | Day         | Brown, Yvonne | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |                   |      | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...                                                    | Thu 18/08/2016 | 08:00      | 17:30 | Day         | Brown, Yvonne | <input checked="" type="checkbox"/> | Temp sick      | <input type="checkbox"/> |                | <input type="checkbox"/> |            |                   |      | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...                                                    | Fri 19/08/2016 | 08:00      | 17:30 | Day         | Smythe, June  | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |                   |      | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...                                                    | Sat 20/08/2016 | 08:00      | 17:30 | Day         | Smythe, June  | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |                   |      | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...                                                    | Sun 21/08/2016 | 08:00      | 17:30 | Day         | Smythe, June  | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |                   |      | <input type="checkbox"/> | <input type="checkbox"/> |

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



**Notify Candidate about Shift Confirmation**

Template: **Notify Candidate about Shift Confirmation** ☒ Create Contact Event

|                                           |       |
|-------------------------------------------|-------|
| Notify Candidate about Shift Confirmation | EMAIL |
| Alternative Candidate Shift Notify        | EMAIL |

Recipients:

Attachments:

Subject:

**Ayesha**

You will be working as Researcher - Legal

at Baldwin Inc., 36 Main Road, EDINBURGH, EH1 8TF

Tuesday 16/08/2016 08:00 – 17:30

**Ivan Baldwin**  
Consultant  
Events

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

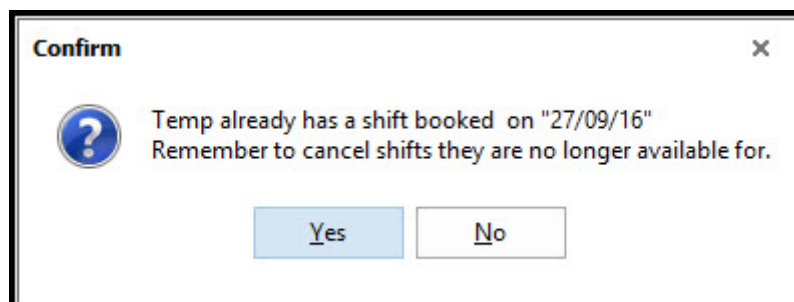
In Person – Payroll - checkers for IBAN and Swift banking numbers have been added as ellipses at the end of both fields. These ellipses take the user to websites where IBAN and Swift numbers can be verified.

|                          |                                                                                 |
|--------------------------|---------------------------------------------------------------------------------|
| 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                                                                            |

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.



| Role Group | All                  |                       | Search                              |             |
|------------|----------------------|-----------------------|-------------------------------------|-------------|
| Group      | Role                 | Search Criteria Group | Assigned                            | Expires     |
| GENERAL    | Permanent Consultant |                       | <input checked="" type="checkbox"/> | Key role: u |
| GENERAL    | Temp Consultant      |                       | <input type="checkbox"/>            | Key role: u |
| GENERAL    | Accounts Clerk       |                       | <input checked="" type="checkbox"/> | Key role: u |

**Register Candidate in the Industrial department**

Please tick Permanent and/or Temp to indicate the type of work for which registered

|            |                                     |
|------------|-------------------------------------|
| Department | Industrial                          |
| Permanent  | <input checked="" type="checkbox"/> |
| Temp       | <input type="checkbox"/>            |

## 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.

**Account Code - ABC001 ABC Baldwin**

Save And Close Abandon Update Send Statement Reports **New Invoice Address**

A/c Setup Group Timesheets on Invoice One invoice for each Company PO Numbr. and Period

Accounts Invoice Management Group Batch

Invoice Address 101 Varley Street

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.



**Authorise Invoices**

Invoice Management Group: All inc. unassigned

| Name                      | Invoices |
|---------------------------|----------|
| ▶ Sales Inv Shift Details | 17       |

Type: All

Validation Report

Preview

Authorise & Create PDF

Close

## System Administrator

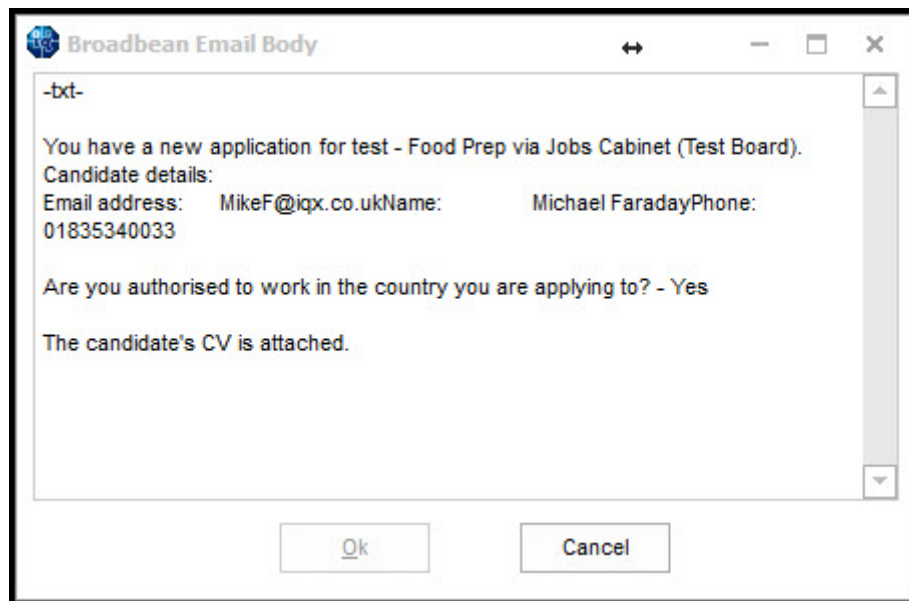
### Broadbean - Switchable Job description/Vacancy Notes

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.



**Add Person** [X]

Surname

Forenames

Full Name

Salutation

Keyname

Email

Mobile

Home Phone

Work Phone

Address

State

Source

Division

Notes

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

| General Settings                                 |       |                                       |                                        |                                                       |                                                                                                                                                                                                          |
|--------------------------------------------------|-------|---------------------------------------|----------------------------------------|-------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name or Notes <input type="text" value="broad"/> |       | Search                                | Group <input type="text" value="All"/> | Branch <input type="text" value="All"/>               | <input type="button" value="Get Colour"/> <input type="button" value="Save and Close"/> <input type="button" value="Abandon"/> <input type="button" value="Update"/> <input type="button" value="Help"/> |
| No                                               | Group | Name                                  | Value                                  | Notes                                                 |                                                                                                                                                                                                          |
| 640 Settings                                     |       | Broadbean Default Person State        | Y                                      | If you select to download only 'Suitable' candidates, |                                                                                                                                                                                                          |
| 641 Settings                                     |       | Broadbean Auto Import Suitable Can... | Y                                      |                                                       |                                                                                                                                                                                                          |
| 642 Settings                                     |       | Contact Event for Broadbean New ...   | BB                                     |                                                       |                                                                                                                                                                                                          |
| 643 Settings                                     |       | Broadbean Vacancy Advert              | Y                                      | Defaults to the Notes field, if Yes use the Other Not |                                                                                                                                                                                                          |
| 651 Settings                                     |       | Enabled Broadbean Hybrid              | Y                                      | Only valid if broadbean is enabled.                   |                                                                                                                                                                                                          |
| 652 Settings                                     |       | Broadbean Notify on Delivery URL      |                                        |                                                       |                                                                                                                                                                                                          |
| 653 Settings                                     |       | Broadbean Reload on Completion URL    |                                        | Reload on completion URL. Only current only applic    |                                                                                                                                                                                                          |
| 654 Settings                                     |       | Use https for Broadbean               | Y                                      | Controls whether Broadbean link uses https or http.   |                                                                                                                                                                                                          |
| 655 Settings                                     |       | Broadbean Stylesheet                  |                                        | Specification Fully qualified URL of stylesheet eg Ex |                                                                                                                                                                                                          |
| 657 Settings                                     |       | Broadbean Step1                       | Y                                      | Choose whether or not to force the user to select t   |                                                                                                                                                                                                          |

## 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.

|              |                                         |   |
|--------------|-----------------------------------------|---|
| 240 Accounts | PDF Invoice includes scanned timesheets | Y |
|--------------|-----------------------------------------|---|

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

|                                |                          |
|--------------------------------|--------------------------|
| Invoice PDF exclude Timesheets | <input type="checkbox"/> |
|--------------------------------|--------------------------|

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.

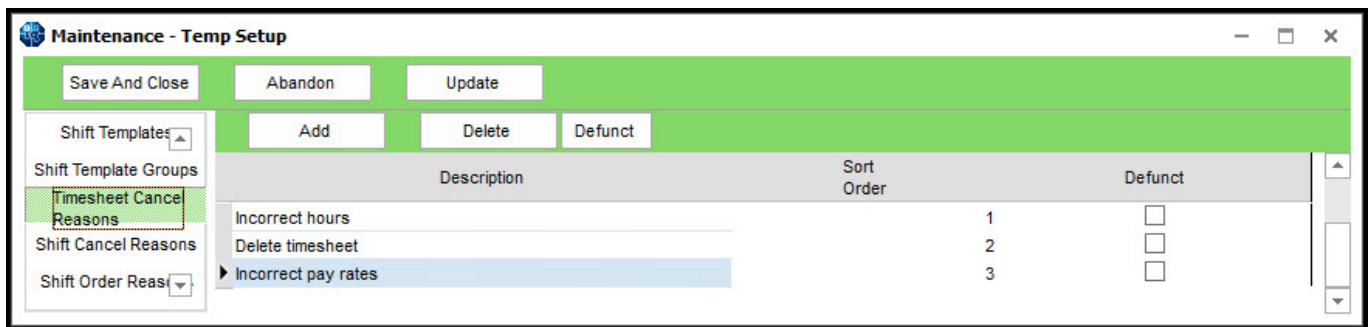
Timesheet for Beedley Johnathon as Veg Prep at ...

Select a Cancel Reason

Incorrect hours  
Incorrect pay rates  
Delete timesheet

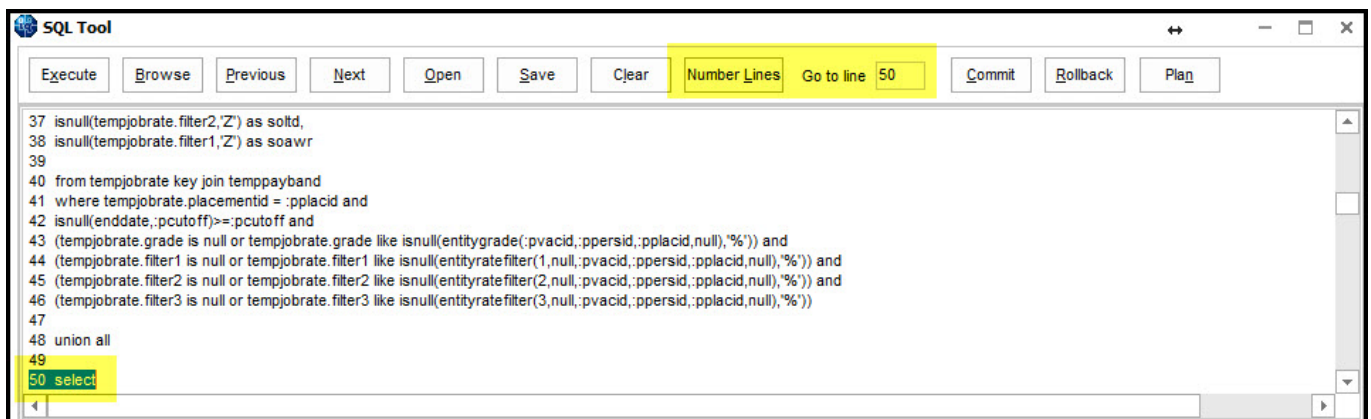
The reasons will appear on both the cancelled and amended timesheets.

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

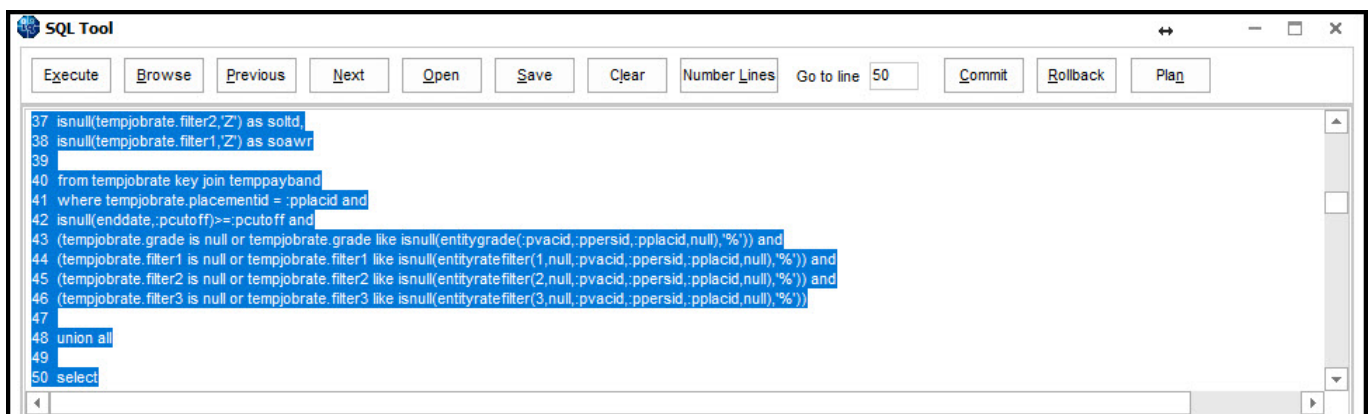


## SQLTool. Line numbering and go to line added

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.



2026/09/22 04:21

20/27

Release 2.16.10

**Maintenance - Temp Setup**

Save And Close Abandon Update

Unavailability Reasons Add Delete Help

| Description                                    | Transmission Type | Notification Type | Recipient Type | Template      | Sort Order | Group Code | Defunct                  |
|------------------------------------------------|-------------------|-------------------|----------------|---------------|------------|------------|--------------------------|
| SMS Query Candidate about Shift Confirmation   | SMS               | QueryConfirm      | Candidate      | Can you wor   | 5          |            | <input type="checkbox"/> |
| Email Query Candidate about Shift Confirmation | Email             | QueryConfirm      | Candidate      | <h2>{APP_S    | 10         |            | <input type="checkbox"/> |
| Notify Candidate about Shift Confirmation      | Email             | NotifyConfirm     | Candidate      | <p>{APP_SA    | 10         |            | <input type="checkbox"/> |
| Notify Client about Shift Confirmation         | Email             | NotifyConfirm     | Client         | <p>{COM_SA    | 10         |            | <input type="checkbox"/> |
| Alternative Candidate Shift Notify             | Email             | NotifyConfirm     | Candidate      | <h2>Hello!</t | 20         |            | <input type="checkbox"/> |
| Notify Candidate about Shift CANCELLATION      | Email             | NotifyCancel      | Candidate      | <p>{APP_SA    | 50         |            | <input type="checkbox"/> |
| Notify Client - Shift CANCELLATION             | Email             | NotifyCancel      | Client         | <p>{COM_SA    | 60         |            | <input type="checkbox"/> |
| Ask Candidate about Availability for Shifts    | Email             | QueryBook         | Candidate      | <p>{APP_SA    | 70         |            | <input type="checkbox"/> |
| SMS Notify Candidate about Shift Confirmation  | SMS               | Notify Confirm    | Candidate      | Confirming y  | 80         |            | <input type="checkbox"/> |

External Price List

**Template**

<h2>{APP\_SALUTATION}</h2>  
<h4>Can you work these shifts?</h4>  
<p>{VAC\_POSITION}</p>  
<p>at {COM\_COMPANYNAME}</p>

<table>  
{SHN\_BEGIN}  
<tr>  
<td>{SHN\_DATE DDDD dd/mm/yyyy}</td>  
<td>{SHN\_FROM} - {SHN\_TO}</td>  
</tr>  
{SHN\_END}  
</table>

OK Cancel

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.

**Shift Confirmations for Researcher - Legal, 10 Group PLC**

Week Beginning 15/08/2016 Week(s) 1

Candidate Save and Close Include Confirmed Select All None Abandon Select All None SMS / Email Query Select All None

| Our Ref. | Date           | From  | To    | Description | Person        | Cancelled                           | Cancel Reason  | Client Confirmed         | Confirmed With | Temp Confirmed           | Their Ref. | Grade | Note | Send Query               | Notify Client            | Notify Temp              |
|----------|----------------|-------|-------|-------------|---------------|-------------------------------------|----------------|--------------------------|----------------|--------------------------|------------|-------|------|--------------------------|--------------------------|--------------------------|
| 15...    | Mon 15/08/2016 | 08:00 | 17:30 | Day         | Brown, Yvonne | <input checked="" type="checkbox"/> | Temp cancelled | <input type="checkbox"/> |                | <input type="checkbox"/> |            |       |      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...    | Tue 16/08/2016 | 08:00 | 17:30 | Day         | Brown, Ayesha | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |       |      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...    | Tue 16/08/2016 | 08:00 | 17:30 | Day         | Brown, Yvonne | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |       |      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...    | Wed 17/08/2016 | 08:00 | 17:30 | Day         | Brown, Yvonne | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |       |      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...    | Thu 18/08/2016 | 08:00 | 17:30 | Day         | Brown, Yvonne | <input checked="" type="checkbox"/> | Temp sick      | <input type="checkbox"/> |                | <input type="checkbox"/> |            |       |      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...    | Fri 19/08/2016 | 08:00 | 17:30 | Day         | Smythe, June  | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |       |      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...    | Sat 20/08/2016 | 08:00 | 17:30 | Day         | Smythe, June  | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |       |      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15...    | Sun 21/08/2016 | 08:00 | 17:30 | Day         | Smythe, June  | <input type="checkbox"/>            |                | <input type="checkbox"/> |                | <input type="checkbox"/> |            |       |      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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



**Notify Candidate about Shift Confirmation**

Template: **Notify Candidate about Shift Confirmation** ☒ Create Contact Event

| Template                                  | Type  |
|-------------------------------------------|-------|
| Notify Candidate about Shift Confirmation | EMAIL |
| Alternative Candidate Shift Notify        | EMAIL |

Recipients:

Attachments:

Subject:

**Ayesha**

You will be working as Researcher - Legal

at Baldwin Inc., 36 Main Road, EDINBURGH, EH1 8TF

Tuesday 16/08/2016 08:00 – 17:30

**Ivan Baldwin**  
Consultant  
Events

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.

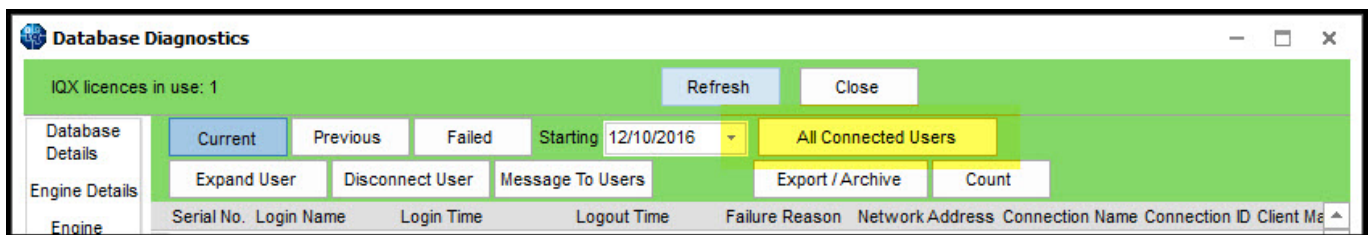
Information is displayed in the alert column at Temp Desk – Expiry Dates.



|                                    |   |                                               |
|------------------------------------|---|-----------------------------------------------|
| Custom Column Settings             | ▶ | Vacancy Shift Matcher Numeric Custom Column   |
| Compliance                         | ▶ | Vacancy Shift Matcher Text Custom Column      |
| IQX Hub                            | ▶ | Vacancy Shift Matcher Custom Sort Order       |
| Temp Rate and Grade Functions      | ▶ | Candidate Shift Matcher Numeric Custom Column |
| Communications inc. Email          | ▶ | Candidate Shift Matcher Text Custom Column    |
| Notifications                      | ▶ | Shift Matcher Custom Shift Description        |
| Content for Document Display Views |   | Shift Matcher Custom Shift Skill Description  |
| Temp Shift Editing Allowed         |   | Temp Colour for Temp Desk                     |
| Temp Shift Confirmation Change     |   | Temp Desk Custom Grid Column                  |
| Temp Timesheet Complete            |   | Temp Desk Expiry Alert Extra                  |

## 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.

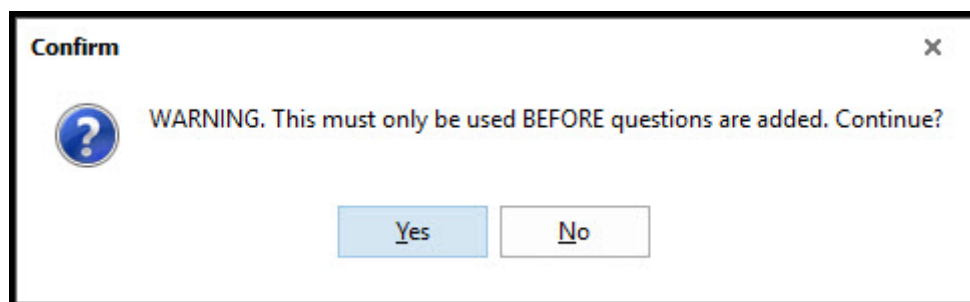


## Maintenance, Document Types. Add and Remove Buttons added

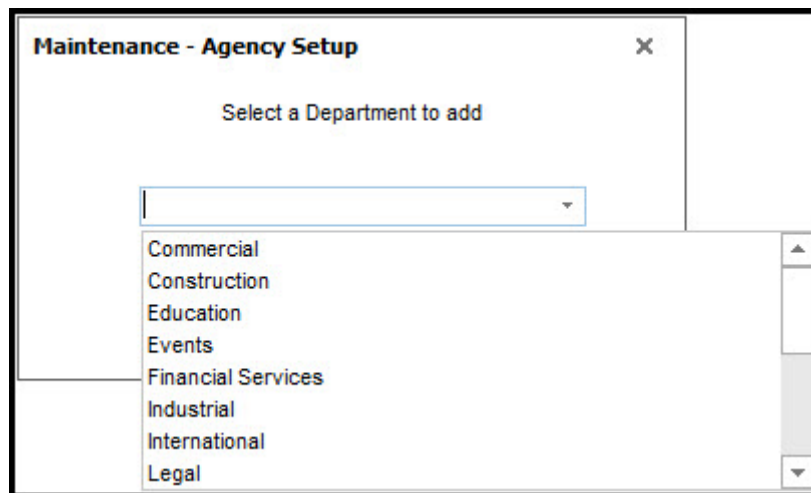
In Maintenance - Agency setup - Document types three new buttons have been inserted, (Initial Departments, Add Department and Remove Department).

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.

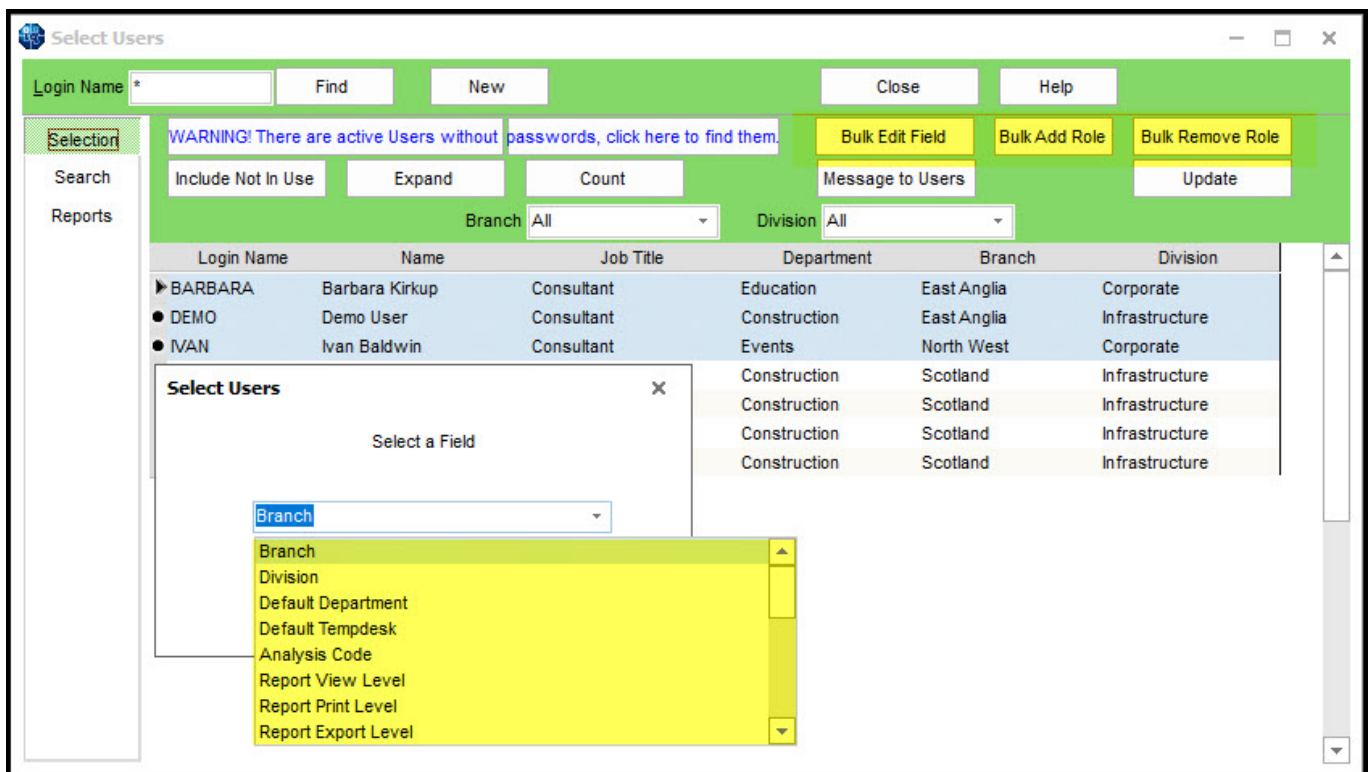


Add and Remove Department buttons give the user the option to select the Department to add or remove.



## 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.



| Order | Question ID | Question Description | Type               | Min Step Size | Units | Required                 | Group | Audit                               | Web Publish              | Web View                 | Search Hide              | Head Coll                |
|-------|-------------|----------------------|--------------------|---------------|-------|--------------------------|-------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 5     | TT          | ***Compliance***     | Heading            |               |       | <input type="checkbox"/> | -2    | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10    | PS          | Position Sought      | Single Selection   |               |       | <input type="checkbox"/> | -2    | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 20    | SAL         | Salary wanted        | Numeric            |               |       | <input type="checkbox"/> | -2    | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 30    | QL          | Qualifications       | Multiple Selection |               |       | <input type="checkbox"/> | -2    | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 40    | JT          | Job Title            | Multiple Selection |               |       | <input type="checkbox"/> | -2    | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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

**Confirm**

?

This will redo the order in steps of 10. Continue?

Yes No

| Order | Question ID | Question Description | Type               | Min Step Size | Units | Required                 | Group | Audit                    | Web Publish              | Web View                 | Search Hide              | Head Coll                |
|-------|-------------|----------------------|--------------------|---------------|-------|--------------------------|-------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 10    | TT          | ***Compliance***     | Heading            |               |       | <input type="checkbox"/> | -2    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 20    | PS          | Position Sought      | Single Selection   |               |       | <input type="checkbox"/> | -2    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 30    | SAL         | Salary wanted        | Numeric            |               |       | <input type="checkbox"/> | -2    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 40    | QL          | Qualifications       | Multiple Selection |               |       | <input type="checkbox"/> | -2    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## 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                                                            |
| <input checked="" type="checkbox"/> Bank Details  | YORKSHIRE BUILD SOCY, Yorkshire BS Collections 1 Code 00-00-00 A/c No. 01451451 |
| <input type="checkbox"/> 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.



**Questionnaire Maintenance**

**Candidate Questionnaire for Construction Department**

Questions Add Delete Undo # for id Find Questions Redo Order

| Order | Question ID | Question Description | Type                     | Min Step Size    | Units | Required                 | Group | Audit                    | Web Publish              | Web View                 | Search Hide              | Head Coll                |
|-------|-------------|----------------------|--------------------------|------------------|-------|--------------------------|-------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| ▶     | 60          | BE                   | Professional membership? | Single Selection |       | <input type="checkbox"/> | -2    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Choices Add Delete Undo Sub Choices Add Delete Undo

| Order | Choice ID | Choice Description | Autofill search words (comma separated) | Value |
|-------|-----------|--------------------|-----------------------------------------|-------|
| ▶     | 10        | _                  | Yes                                     | Yes   |
|       | 20        | N                  | No                                      | No    |

Update Save and Close Abandon Help

**Questionnaire Maintenance**

**Candidate Questionnaire**

Questions Add Delete Undo # for id Find Questions Redo Order

| Order | Question ID | Question Description | Type                    | Min Step Size    | Units | Required                 | Group | Audit                    | Web Publish              | Web View                 | Search Hide              | Head Coll                |
|-------|-------------|----------------------|-------------------------|------------------|-------|--------------------------|-------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| ▶     | 440         | FF                   | Can you do a headstand? | Single Selection |       | <input type="checkbox"/> | -2    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Choices Add Delete Undo Sub Choices Add Delete Undo

| Order | Choice ID | Choice Description | Autofill search words (comma separated) | Value |
|-------|-----------|--------------------|-----------------------------------------|-------|
| ▶     | 10        | _                  | YES                                     | YES   |
|       | 20        | N                  | NO                                      | NO    |

Update Save and Close Abandon Help

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

Navigation: ⏪ ⏩ ⏴ ⏵

Buttons: Reports Register Delete Search Help Registration Report

| Perm    | Division       | Job Title          | Simple just be? | Can you do a headstan |
|---------|----------------|--------------------|-----------------|-----------------------|
| 2nd Not | Thomas Abraham | Bricklayer, Joiner | Yes             | YES                   |

## Woodpecker Script BROWSECURURL added

The new parameter BROWSECURURL 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.



Maintenance - Accounts Setup

Save And Close

Abandon

Update

Currencies

Countries

VAT Rates

Documents

Add

Delete

Help

| Ledger ID | Account Code | Name              |
|-----------|--------------|-------------------|
| Cash      | BANK1        | Main Bank Account |
| Sales     | 159          | test              |

Orphan Account Documents - 159

Save And Close

Abandon

Update

Expand

| Type | Our Ref | Their Ref | Date | Amount | Outstanding | Status |
|------|---------|-----------|------|--------|-------------|--------|
|------|---------|-----------|------|--------|-------------|--------|

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