



# Release 2.16.2

**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

#### New Person Wizard - filtering of Temp Desks

In order to avoid long lists Temp Desks are now filtered according to the Users' Division Access as set in Users – Division Access and also in File - Select Division.

This feature will require System Administrator set up.

The screenshot shows the 'New Person Wizard' for 'Joe Bloggs'. The 'Division Access' section is highlighted in the left sidebar. The main form has tabs for 'All', 'Own', and 'Selected'. The 'Selected' tab is active, showing a list of divisions with checkboxes. 'BR Derby' is selected.

| Division          | Select                              |
|-------------------|-------------------------------------|
| BR Derby          | <input checked="" type="checkbox"/> |
| BR Leicester      | <input type="checkbox"/>            |
| BR Nottingham     | <input type="checkbox"/>            |
| Legal Recruitment | <input type="checkbox"/>            |

In addition, Defunct Temp Desks can now be hidden when completing the New Person Wizard and in the Temp Desk drop down menu.



The screenshot shows the 'Temp Desk' interface. At the top, there are three dropdown menus: 'Desk', 'View', and 'Year'. The 'Desk' dropdown is open, showing a list of options: Derby Industrial, Industrial Drivers, Leicester Ind Shifts, Leicester Industrial, and All. The 'View' dropdown is set to 'Weekly Shift' and the 'Year' dropdown is set to '2014'. Below the 'Desk' dropdown, there is a 'Vacancy Shifts' button. Below this, there is a message: 'Please tick any Temp Desks in which the Candidate will be registered'. Below the message is a table with two columns: 'Temp Desk' and 'In Pool'.

| Temp Desk            | In Pool                  |
|----------------------|--------------------------|
| Derby Industrial     | <input type="checkbox"/> |
| Leicester Ind Shifts | <input type="checkbox"/> |
| Leicester Industrial | <input type="checkbox"/> |
| Industrial Drivers   | <input type="checkbox"/> |

This is activated in by your System Administrator.

## Email body text with mailmerge letter attachment

It is now possible to add email body text when sending letters as an attachment using the mailmerge function.

To use this function Person - Select candidates - Mail Merge - Select Merge Document - Open - Select Signatory where a choice is available - OK - Select which records will be used. - OK - Review each letter using the video buttons to transit between letters. - Email Where Available.



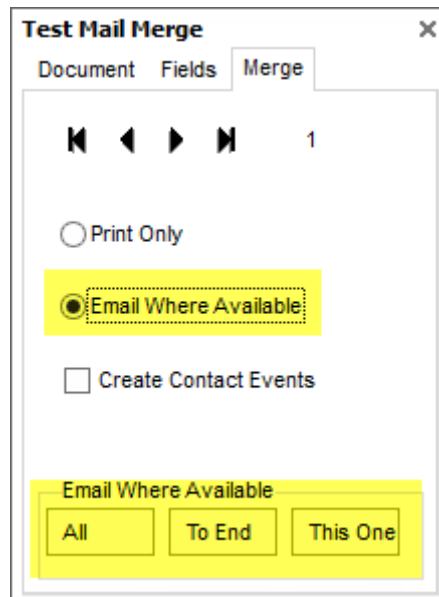
The 'Test Mail Merge' dialog box has three tabs: 'Document', 'Fields', and 'Merge'. The 'Merge' tab is selected and highlighted in yellow. It contains navigation buttons (back, forward, first, last) and a page indicator '1'. There are three radio buttons: 'Print Only' (selected), 'Email Where Available' (highlighted in yellow), and 'Create Contact Events'. At the bottom, there is a 'Print Out' section with three buttons: 'All', 'To End', and 'This One'.

Select Attachment. Without this the template and Attachment Message boxes will not be available. Select the required template (Note if Agency Setup - Branding is enabled this will show all templates from within the 'MAILMERGEATTACHMENT' Brand.). Insert the attachment message. Click OK.

The 'E-Mail' dialog box shows the 'Subject' field with 'Test'. The 'Attachment Message Text' section has a 'Template' dropdown menu open, showing 'TEMPNOTIFICATION TEST1'. Below this is a large text area for 'Insert your message here'. The 'Attachments' section has 'CV(s)' checked and 'Letter as' set to 'Attachment' (highlighted in yellow). There are 'File', 'Document', and 'Remove' buttons. A 'Files and Documents' list is empty. At the bottom, a red box highlights the 'Print Selection : 1 out of 4 without Email Address' section, which contains three radio buttons: 'Send or Print All' (selected), 'Send those with Address (ignore others)', and 'Print those without Address (ignore others)'. The 'Include IQX Signature' checkbox is checked. 'Ok' and 'Cancel' buttons are at the bottom right.



Email Where Available at the bottom of the next window. Choose from All/To End/This One. Clicking one of these buttons will send the emails and attachments.

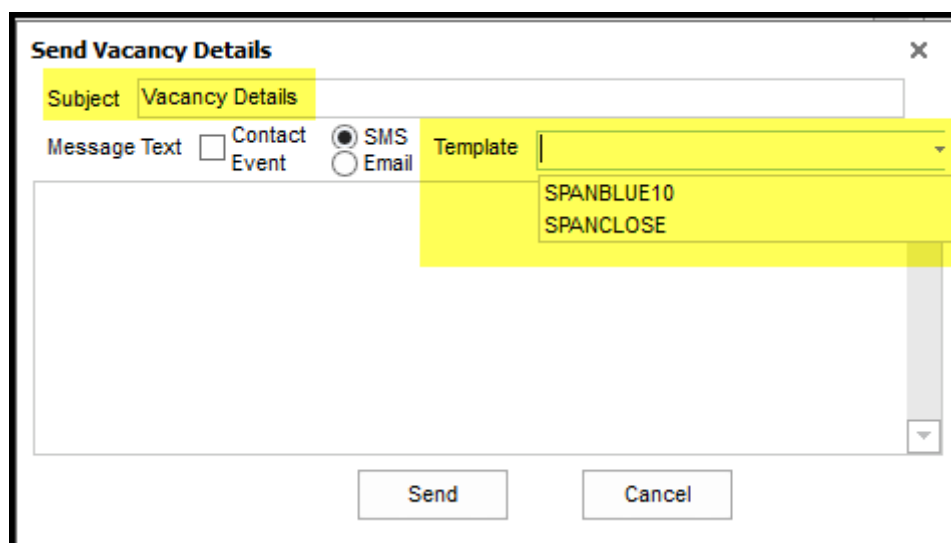


## Send Details - Modifiable Email subject

If set up to send details from Vacancy - Shortlist and Person - Progress the subject line can now be modified and defaults to Vacancy Details.

A template drop down menu has also been added allowing the use of templates when sending details.

In Person - Progress or Vacancy - Short List select a record and click Send Details.



If Agency Setup Branding is enabled and there is a brand called 'PROGRESSSENDDetails', the



template descriptions will appear in the drop down list. If no Branding for PROGRESSSENDDetails not set up, then the boilerplate 'contact event' descriptions will appear. If required 'PROGRESSSENDDetails' will require System Administrator set up.

If SMS is ticked the subject is ignored and does not count towards the character count

## Broadbean candidate CV retrieval by ranking

Broadbean functionality has been extended in IQX to allow Users to retrieve CVs according to Broadbean's ranking. Users can retrieve CVs ranked Suitable, Unsuitable, Maybe Suitable, Unranked or All. This ranking uses the same naming convention as the Broadbean site.

Once a vacancy has been posted via a job board the Broadbean icon will have a red tick in it. Select this icon. In the next window select Candidates - Retrieve Candidates and select the ranking. Results which have been ranked by Broadbean will be displayed. The rank of each result is shown in the rank column.

See IQX for full details on setting up and using Broadbean.

**Broadbean : Temp Vacancy: Operator for 3I Group PLC**

Delete Advert | Advert Check | New Advert | Update | Close | Please Wait....

Advert - Checkdate :

| LocationPath | Industry            | Create Time  | Close Time | Description   | Reference | Title    | Type     | Salary Ben         |
|--------------|---------------------|--------------|------------|---------------|-----------|----------|----------|--------------------|
|              | Building & Construc | 26/01/2016 1 |            | This is not a | Test1     | Operator | Contract | Plentiful training |

Channels | **Candidates**

View CV | Import Candidate and add to shortlist | **Retrieve Candidates** | Candidate

| Name            | Forename | Surname | Salutation | Address | Street | Town | Postcode | Email    | Phone         | App. Time    | Rank     | Channel Name             | Imported                            | ShortListed                         |
|-----------------|----------|---------|------------|---------|--------|------|----------|----------|---------------|--------------|----------|--------------------------|-------------------------------------|-------------------------------------|
| Brittany Spiers |          |         |            |         |        |      | 2 7JR    | ivan@iqx | 0115 981 4675 | 26/01/2016 1 | Unranked | Jobs Cabinet (Test Board | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Karen Howes     |          |         |            |         |        |      | 12 8J    | jbloggs@ | 0208 675 1234 | 26/01/2016 1 | Unranked | Broadbean Test Board     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

**Candidate Rank**

Rank

All  
Unranked  
UnSuitable  
MaybeSuitable  
Suitable

## New Candidate - Duplicate Check

When registering a new candidate IQX checks for and suggests possible duplicate candidates at the end of the first window and once the New Person wizard is completed. It checks name (> 70%), date of birth, email and postcode. It is now possible to modify the duplicate candidate check to ignore



duplicate postcodes which will result in more possible duplicates.

This will require System Administrator set up.

## Web Referencing

Web Referencing has now been extended to allow Agency Setup Branding to be applied to emailed Reference Requests.

This functionality relies on set up by IQX staff in conjunction with System Administrators. An updated User Guide is available here. [User Guide](#)

## Accounts

### New switchable vat rates

It is now possible to add 5% and 10% VAT rates to the company form where the application of these rates are permitted by HMRC.

This feature will require System Administrator set up.

Once set up the additional rates can be seen in Company - Miscellaneous - VAT Status drop down menu.

|               |                             |                                     |
|---------------|-----------------------------|-------------------------------------|
| Questionnaire | Credit Limit                |                                     |
| Notes         | Days Credit                 | 14                                  |
| Extra Notes   | Group Timesheets on Invoice | One invoice for each Timesheet      |
| Group Tree    | Invoice Frequency           | Weekly                              |
|               | Company Reg. No.            |                                     |
|               | VAT Number                  |                                     |
| Miscellaneous | Invoice This Record Address | <input checked="" type="checkbox"/> |
| Accounts      | Invoice Address             | 36 George Street, EDINBURGH         |
| Documents     | Currency                    |                                     |
|               | On Stop                     | <input type="checkbox"/>            |
| Temp Details  | E-Timesheets                | <input type="checkbox"/>            |
| Location Map  | VAT Status                  | Standard                            |
| Company       | Not Ltd. Company            | Standard                            |
| WebSite       | ERNI on Invoice             | Exempt                              |
| Cascade Rules | Timesheet Contact           | 5 %                                 |
|               | Invoice E-mail              | 10 %                                |
| Audit Tr      | Statement E-mail            |                                     |



# System Administrator

## New Person Wizard - filtering of Temp Desks

Defunct Temp Desks can now be hidden when completing the New Person Wizard.

To set this feature go to Maintenance - General Settings - Temps - No 850 and set to Y.

The screenshot shows the 'General Settings' window with a green header bar. Below the header, there is a search bar and several dropdown menus. The 'Group' dropdown is set to 'Temps' and the 'Branch' dropdown is set to 'All'. Below these, there is a table with columns: No, Group, Name, Value, and Notes. The table has one row with '850' in the 'No' column, 'Temps' in the 'Group' column, 'Hide defunct tempdesks' in the 'Name' column, 'Y' in the 'Value' column, and an empty 'Notes' column. At the bottom of the window, there are navigation buttons: '<', '>', and '<>'.

| No  | Group | Name                   | Value | Notes |
|-----|-------|------------------------|-------|-------|
| 850 | Temps | Hide defunct tempdesks | Y     |       |

## Send Details - Modifiable Email subject

When sending details from Vacancy - Shortlist and Person - Progress the subject line can now be modified and defaults to Vacancy Details.

A template drop down menu has also been added allowing the use of templates when sending details.

Progress State Codes for Details Sending must be populated in Maintenance - General Setting - Settings - No 87. Progress State Codes can be obtained from Maintenance - Agency Setup - Progress States.

In Person - Progress or Vacancy - Short List select a record and click Send Details.

The screenshot shows the 'Send Vacancy Details' dialog box. It has a title bar with a close button. Inside, there is a 'Subject' field with the text 'Vacancy Details'. Below this, there are two radio buttons: 'Contact Event' (unchecked) and 'SMS' (checked). To the right of the radio buttons is a 'Template' dropdown menu. The dropdown menu is open, showing two options: 'SPANBLUE10' and 'SPANCLOSE'. At the bottom of the dialog box, there are two buttons: 'Send' and 'Cancel'.



If Branding is enabled and there is a brand called 'PROGRESSSENDDetails', the template descriptions will appear in the drop down list. If no Branding for PROGRESSSENDDetails not set up, then the boilerplate 'contact event' descriptions will appear. If required 'PROGRESSSENDDetails' will require System Administrator set up.

## New Candidate - Duplicate Check

When registering a new candidate it is now possible to modify the duplicate candidate check to ignore duplicate postcodes, which will result in more possible duplicates.

This is set up in General Settings - Settings - 1920 - Ignore Postcode in Duplicate Check - Y.

The screenshot shows the 'General Settings' window with the 'Settings' group selected. The table lists the following entry:

| No   | Group    | Name                               | Value | Notes                                              |
|------|----------|------------------------------------|-------|----------------------------------------------------|
| 1920 | Settings | Ignore Postcode in Duplicate Check | Y     | Person / Company Duplicate Check. Default includes |

## New switchable vat rates

It is now possible to add 5% and 10% VAT rates to the company form where the application of these rates are permitted by HMRC.

To ensure the additional rate are visible Maintenance - General Settings - Accounts - No 60 should be set to N.

The screenshot shows the 'General Settings' window with the 'Accounts' group selected. The table lists the following entry:

| No | Group    | Name                                  | Value | Notes                                             |
|----|----------|---------------------------------------|-------|---------------------------------------------------|
| 60 | Accounts | Restrict Company Miscellaneous to ... | N     | Restricts access to the Miscellaneous view on the |

and Extra VAT Types for Accounts should be set to Y.

The screenshot shows the 'General Settings' window with the 'Accounts' group selected. The table lists the following entry:

| No  | Group    | Name                         | Value | Notes                                               |
|-----|----------|------------------------------|-------|-----------------------------------------------------|
| 450 | Accounts | Extra Vat Types for Accounts | Y     | If "Y", adds in the extra vat types to the picklist |



Once set up the additional rates can be seen in Company - Miscellaneous - VAT Status Drop down menu.

|               |                             |                                     |
|---------------|-----------------------------|-------------------------------------|
| Questionnaire | Credit Limit                |                                     |
| Notes         | Days Credit                 | 14                                  |
| Extra Notes   | Group Timesheets on Invoice | One invoice for each Timeshee       |
| Group Tree    | Invoice Frequency           | Weekly                              |
|               | Company Reg. No.            |                                     |
|               | VAT Number                  |                                     |
| Miscellaneous | Invoice This Record Address | <input checked="" type="checkbox"/> |
| Accounts      | Invoice Address             | 36 George Street, EDINBURGH         |
| Documents     | Currency                    |                                     |
| Temp Details  | On Stop                     | <input type="checkbox"/>            |
|               | E-Timesheets                | <input type="checkbox"/>            |
| Location Map  | VAT Status                  | Standard                            |
| Company       | Not Ltd. Company            | Standard                            |
| WebSite       | ERNI on Invoice             | Exempt                              |
| Cascade Rules | Timesheet Contact           | 5 %                                 |
|               | Invoice E-mail              | 10 %                                |
| Audit Tr      | Statement E-mail            |                                     |

## Deletion of Stored Selections and Searches

Managers can now restrict stored selection and search deletion to the users' own stored selections and searches. If a User attempts to delete searches created by other users the following warning will appear.

**IQX** ×

You do no have permission to delete other users stored searches

OK

Only Users with Manager rights will be able to delete any stored searches and selections via the Manager switch in Maintenance - Users Roles - General - Manager.



**Joe Bloggs**

Save and Close Abandon Update No Password Delete Help Reports

|                        |                        |                          |                       |                         |
|------------------------|------------------------|--------------------------|-----------------------|-------------------------|
| Roles                  | Name                   | Joe Bloggs               | Branch                | Leicester Office        |
| Layout Settings        | Keyname                | BLOGGS JOE               | Division              | Legal Recruitment       |
| Questionnaire          | Login Name             | JBLOGGS                  | Default Department    | Construction            |
| Division Access        | Job Title              | Demo Tester              | Default Tempdesk      | Demo - Construction ABC |
| Department Maintenance | E-Mail Address         | joe.bloggs@iqx.co.uk     | Analysis Code         |                         |
| Popup Escalations      | Short ID               | JB                       | Nominal Segment (main |                         |
| Broadbean              | Template for New Users | <input type="checkbox"/> | Report View Level     | 999                     |
| Audit Trail            | Not In Use             | <input type="checkbox"/> | Report Print Level    | 999                     |
| Own Audit Trail        | Role Group             | All                      | manager               | Search                  |

| Group   | Role    | Search Criteria Group | Assigned                            | Expires | Notes                                           |
|---------|---------|-----------------------|-------------------------------------|---------|-------------------------------------------------|
| GENERAL | Manager |                       | <input checked="" type="checkbox"/> |         | Is able to over-ride selected validation checks |

Deletion of stored searches and selections is now audited.

**Joe Bloggs**

Save and Close Abandon Update No Password Delete Help Reports

|                        |                        |                          |                       |                         |       |
|------------------------|------------------------|--------------------------|-----------------------|-------------------------|-------|
| Roles                  | Name                   | Joe Bloggs               | Branch                | Leicester Office        |       |
| Layout Settings        | Keyname                | BLOGGS JOE               | Division              | Legal Recruitment       |       |
| Questionnaire          | Login Name             | JBLOGGS                  | Default Department    | Construction            |       |
| Division Access        | Job Title              | Demo Tester              | Default Tempdesk      | Demo - Construction ABC |       |
| Department Maintenance | E-Mail Address         | joe.bloggs@iqx.co.uk     | Analysis Code         |                         |       |
| Popup Escalations      | Short ID               | JB                       | Nominal Segment (main |                         |       |
| Broadbean              | Template for New Users | <input type="checkbox"/> | Report View Level     | 999                     |       |
| Audit Trail            | Not In Use             | <input type="checkbox"/> | Report Print Level    | 999                     |       |
| Own Audit Trail        | Date                   | 09/02/2016               | to                    | 09/02/2016              | Count |

| Description                                                        | When             | Old Values | New Values | Connection ID |
|--------------------------------------------------------------------|------------------|------------|------------|---------------|
| Delete Candidate Stored Search Global Vacancy Default Construction | 09/02/2016 16:51 |            |            | 29            |

**Database Diagnostics**

IQX licences in use: 1 Refresh Close

Engine Window: Current Previous Failed Starting 09/02/2016

Audit Trail: Expand User Disconnect User Message To Users Export / Archive Count

| Serial No. | Login Name | Login Time       | Logout Time | Failure Reason | Network Address | Connection Name | Connection ID | Client Machine | Details                                    |
|------------|------------|------------------|-------------|----------------|-----------------|-----------------|---------------|----------------|--------------------------------------------|
| 2168       | jbloggs    | 09/02/2016 12:50 |             |                | 192.168.0.160   | IQX - jbloggs   | 29            | TEST1          | IQX Login Details - Login Name: jbloggs, 2 |

## Web Referencing

Web Referencing has now been extended to allow Branding to be applied to emailed Reference Requests.

This functionality relies on set up by IQX staff in conjunction with System Administrators. For reference a Setup guide has been included. [Setup Guide](#)

From:  
<https://iqxusers.co.uk/iqxhelp/> - iqx

Permanent link:  
[https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release\\_2.16.2&rev=1461665659](https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.16.2&rev=1461665659)

Last update: 2017/11/16 22:07



