



Release 2.16.4

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

Alternative top right view on vacancy

Switchable Extra Notes can now be added to the Vacancy top right view so that users have 2 notes fields.

In the Vacancy form the button Switch Job Desc takes you to the Job Description view and Switch Extra Notes takes you to the Extra Notes view.



This can be set up by your System Administrator.

Export XLS files (jobrunner) with Landscape Orientation

Data exported to an Excel spreadsheet, whilst using Job Runner, can be set to display the information in Landscape format. This is particularly useful for jobs where an Excel spreadsheet is sent to the Candidate to print out timesheets. An extra piece of code needs to be added to an xml job.

Contact IQX to have this facility included in your Xml jobs. This may be chargeable.

Shift confirmation email/sms - (without Branding)

When sending shift confirmations by email and SMS it is now possible to use other boiler plate text



(BPT) in addition to {SHIFTDETAILS} e.g. {VAC_POSITION} {VAC_SITENAME}.

Contact your System Administrator to add additional BPT.

User switch to block editing rates on Vacancy

Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates. This feature becomes active once a placement is made against the vacancy.

This feature will need System Administrator set up.

Make Registration Number Read only

It is now possible to make Person record registration numbers read only.

In the Person record the registration number will be displayed in grey.

Consultant	VRS
Registered	No. 10039
Number	10039
Date	
Last Updated	23/10/2015 14:04

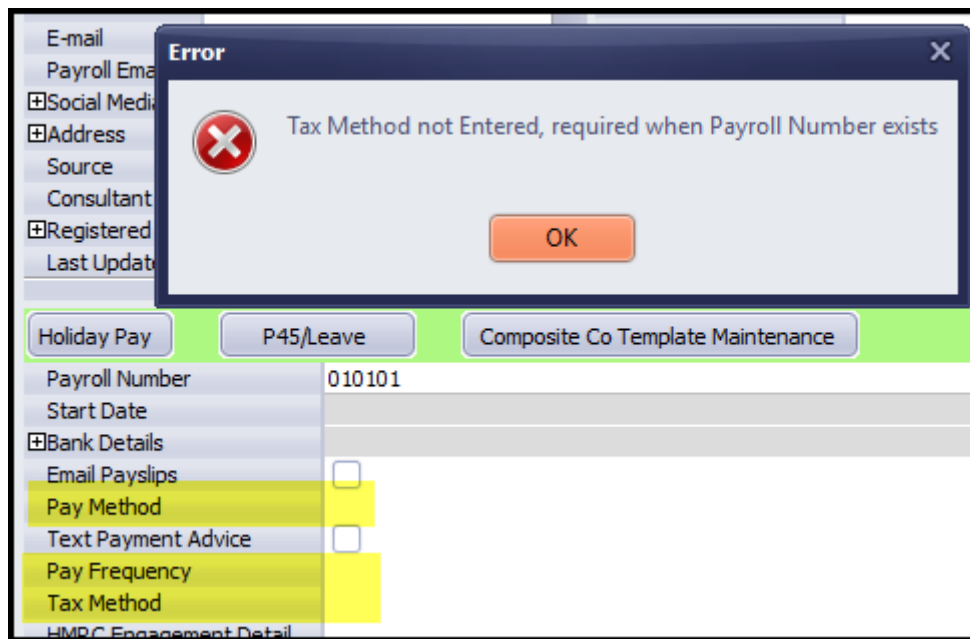
This requires System Administrator set up.

Person payroll validation checks on Pay Freq/Method & Tax Method

New candidates without Tax Method, Payment Method or Pay Frequency will default to PAYE/BACS and Weekly on completion of their first timesheet.

Applicant	
Payroll No.	
Pay Method	BACS
Tax Method	PAYE
Pay Freq.	Weekly
Date of Birth	03/06/1986
NI Number	

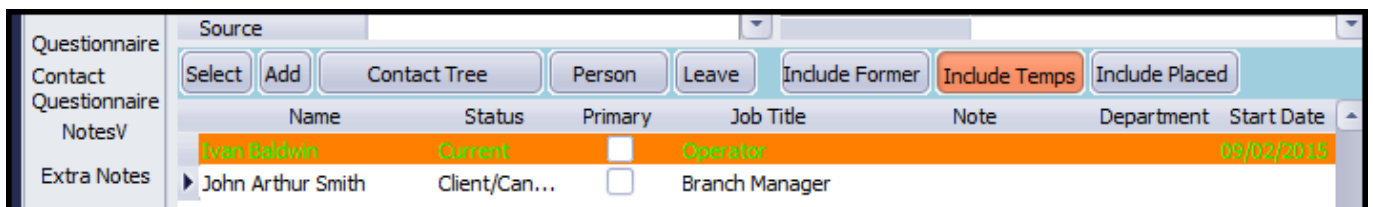
Once a candidate has been issued with a payroll number validation checks will be carried out on the Person record to ensure that they have these fields completed and the Person record cannot be saved without these fields completed.



Company contact view changes

In the company contact view it is now possible to show Temps by default.

It is possible to temporarily switch this view off using the **Include Temps** button.



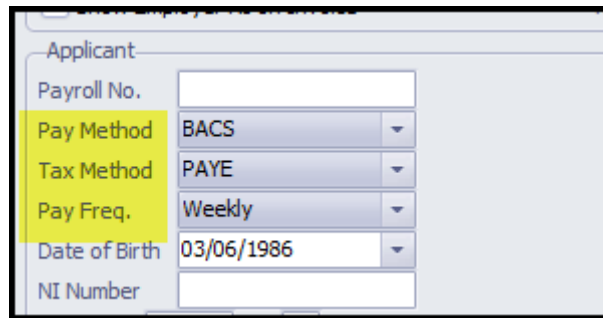
Font and background colours are assigned to different person states the colours will be visible in the company contact view.

Some System Administrator set up is required.

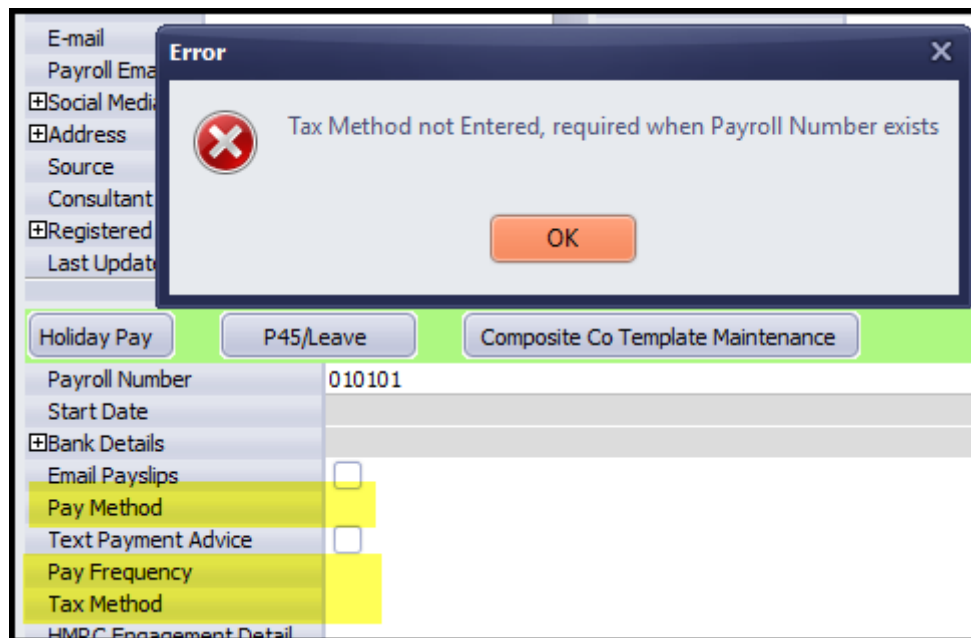
Accounts

Person payroll validation checks on Pay Freq/Method & Tax Method

New candidates without Tax Method, Payment Method or Pay Frequency will default to PAYE/BACS and Weekly on completion of their first timesheet.



Once a candidate has been issued with a payroll number validation checks will be carried out on the Person record to ensure that they have these fields completed and the Person record cannot be saved without these fields completed.



User switch to block editing rates on Vacancy

Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates. This feature becomes be active once a placement is made against the vacancy.

This feature will need System Administrator set up.

Standardise Accord payslip viewing, add date filter

A date filter has been added to the Accord payslip view.

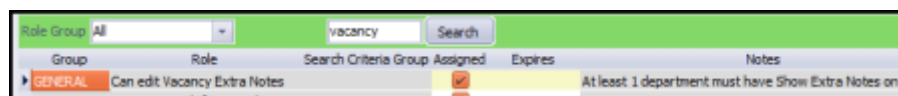


System Administrator

Alternative top right view on vacancy

Switchable Extra Notes can now be added to the Vacancy top right view so that users have 2 notes fields.

This is set up in - Maintenance - User Roles - Can edit Vacancy Extra Notes.

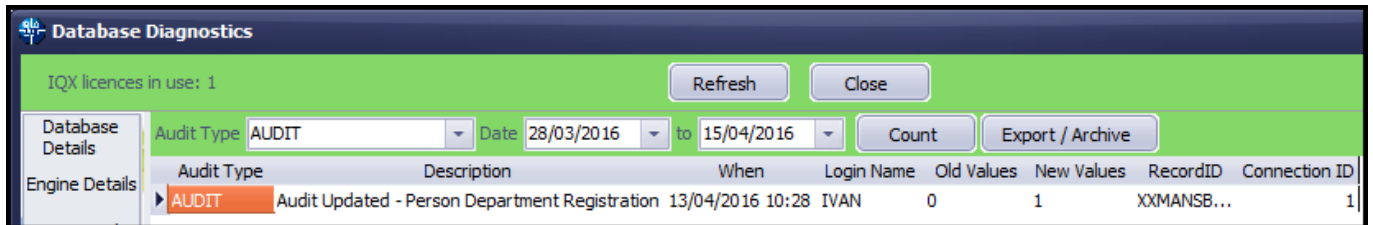


Departments need to be set up to show extra notes via Maintenance - Agency Setup - Departments

Branches	AddDeleteHelp							
Divisions	Applicant QuestionnaireVacancy QuestionnairePlacement QuestionnaireReference QuestionnaireTimes							
Departments								
Document Templates	ID	Department	Searchable	Division	Analysis Code	Publish To Web	Sort Order	Show Extra Notes
Document Types	0	Null	☐			☐		☐
Phone Types	DR	Drivers	☒			☐		☒
	HE	Health	☒			☐		☐
			☐			☐		☐



Any changes to department registration will appear in Maintenance - Database Diagnostics - Audit Trail - AUDIT



The screenshot shows the 'Database Diagnostics' window. It has a green header bar with 'iqx' logo and 'Database Diagnostics' text. Below the header, there's a section for 'IQX licences in use: 1' with 'Refresh' and 'Close' buttons. The main area is divided into 'Database Details' and 'Engine Details'. The 'Engine Details' section shows a table of audit records. The table has columns: Audit Type, Description, When, Login Name, Old Values, New Values, RecordID, and Connection ID. The first row is highlighted in orange and shows 'AUDIT' for the type, 'Audit Updated - Person Department Registration' for the description, '13/04/2016 10:28' for when, 'IVAN' for login name, '0' for old values, '1' for new values, 'XXMANSB...' for record ID, and '1' for connection ID.

Audit Type	Description	When	Login Name	Old Values	New Values	RecordID	Connection ID
AUDIT	Audit Updated - Person Department Registration	13/04/2016 10:28	IVAN	0	1	XXMANSB...	1

Export XLS files (jobrunner) with Landscape Orientation

Data exported to an Excel spreadsheet, whilst using Job Runner, can be set to display the information in Landscape format. This is particularly useful for jobs where an Excel spreadsheet is sent to the Candidate to print out timesheets. The code used to facilitate this is (in bold)

```
<ExportFile filename="{TempDir}Timesheet.xls" excelfontname="Arial" excelfontsize="9"
breakpoint="no" excelorientation="landscape">
```

If the orientation isn't set xls defaults to portrait.

Contact IQX to have this facility included in your Xml jobs. This may be chargeable.

Shift confirmation email/sms - (without Branding)

When sending shift confirmations by email and SMS it is now possible to use other boiler plate text in addition to {SHIFTDETAILS} e.g. {VC_POSITION} {VAC_SITENAME}.

User switch to block editing rates on Vacancy

Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates using a switch in Maintenance - General Settings - Temps - 1010.

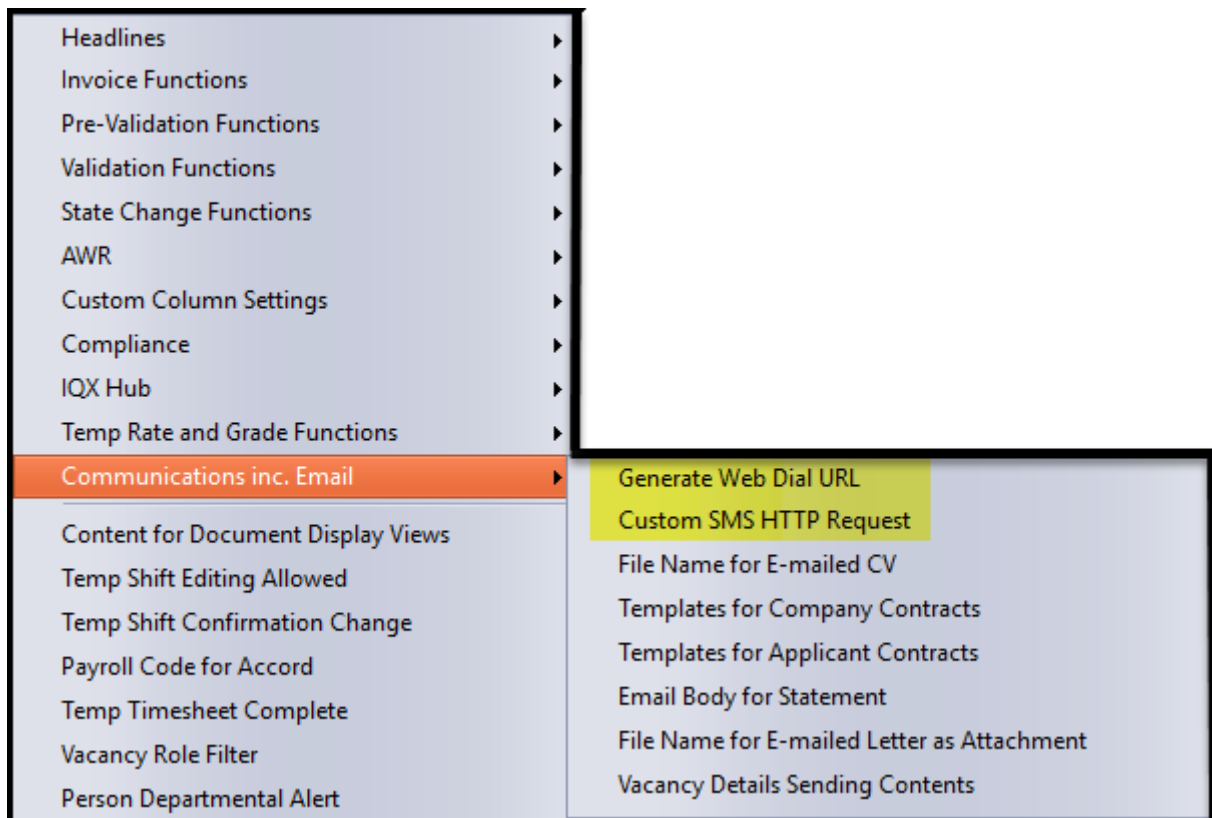
1000 Temps	Show Shift (Our Ref) button on Main	N
1010 Temps	Block editing Rates on Vacancy	Y

This feature becomes be active once a placement is made against the vacancy.

New Database Functions - GenerateWebDialURL() and CustomSMSHTTPRequest()



New functions have been added to Maintenance - Database Functions - Communications inc. Email.



Please contact IQX to have these functions modified. This may be a chargeable activity.

Make Registration Number Read only

It is now possible to make Person record registration numbers read only.

In General Settings - Settings - No. 1980 - Make Registration Number Read only - Y will make registration number read only.

1970 Settings	Vacancy Rates Holiday Pay Descrip...
1980 Settings	Make Registration Number Readonly Y

In the Person record the registration number will be displayed in grey.

Consultant	VRS
☐ Registered	No. 10039
Number	10039
Date	
Last Updated	23/10/2015 14:04



Company contact view changes

In the company contact view it is now possible to show temps by default in Maintenance - General Settings - Settings - No 1251 - Y.

1251 Settings	Inc Temp Applicants in Contact List	Y	Controls whether Temp candidates appear by default in the Company Contacts list
1440 Settings	Initial Temp Vacancy state	C	

In addition font and background colours assigned to different person states will now be visible in the company contact view. These are set up in Maintenance - Agency Setup - Person States.

Maintenance - Agency Setup										
Save And Close Abandon Update										
Branches Divisions Departments Document Templates Document Types Phone Types Boiler Plate Text E-mail Signatures Contact Event Types Contact Event Outcomes Sources Company States Person States Vacancy States	Add Delete Unused Codes Background Colour Font Colour									
	Code	Name	Order	Grid Order	Note	Publish To Web	Set On Web	Background Colour	Font Colour	On Fo
	I C	Current	1	1	Currently looking for w...	☐	☐	33023	65280	
	P	Placed	2	2	Placed	☐	☐	16777215	0	
	L	Client	3	3	Client	☐	☐	16777215	0	
	R	Pre registration	4	4	Added - not enough d...	☐	☐	15588575	-1	
	D	Not Active	6	6	Deleted	☐	☐	16777215	0	
	A	Secondary Agency	10	10	Secondary Agency Temp	☐	☐	16777215	0	
	N	Client/Candidate	11	11	ljkh	☐	☐	16777215	0	
	Z	Umbrella	20	20	Umbrella improt tests	☐	☐	16777215	0	
	.	Archived/DNU	99	99	Deleted	☐	☐	16777215	0	

It is possible to temporarily switch this view off using the **Include Temps** button.

Questionnaire Contact Questionnaire NotesV Extra Notes	Source									
	Select Add Contact Tree Person Leave Include Former Include Temps Include Placed									
	Name	Status	Primary	Job Title	Note	Department	Start Date			
	Ivan Baldwin	Current	☐	Operator			09/02/2015			
	John Arthur Smith	Client/Can...	☐	Branch Manager						

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Last update: 2017/11/16 22:07

