



# 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 |

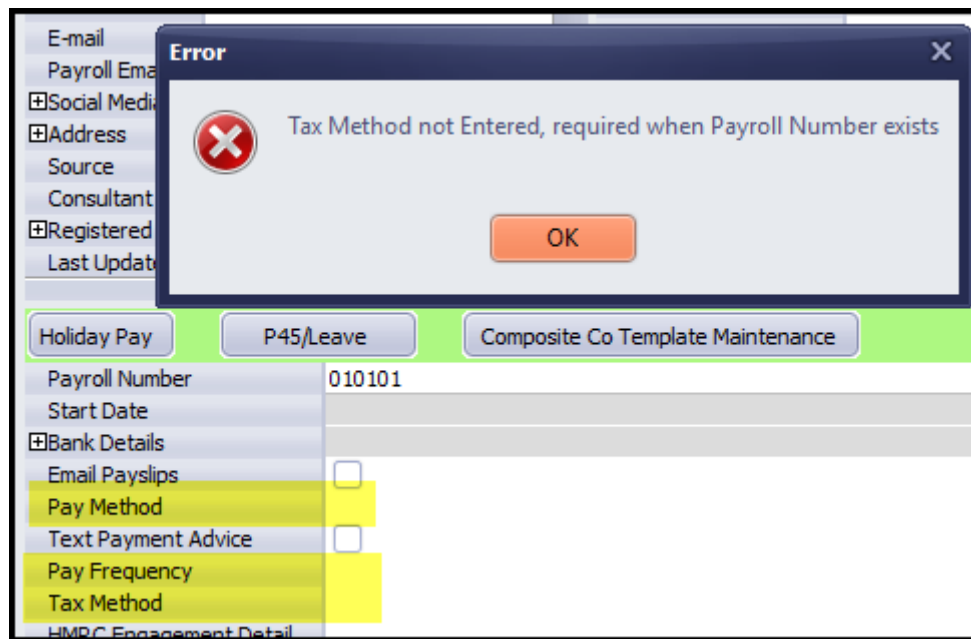
This requires System Administrator set up.

## 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     |            |

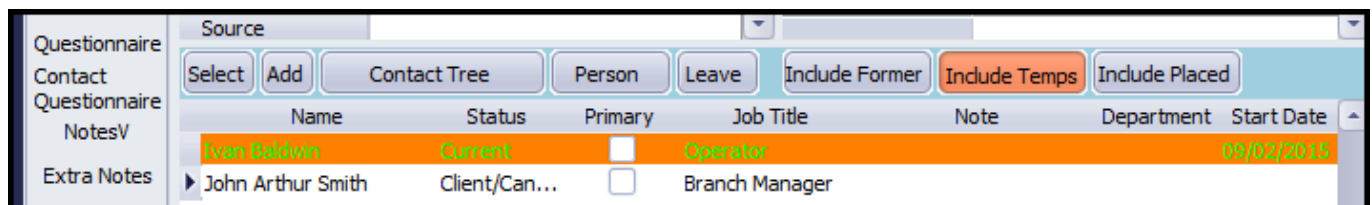
Once a candidate has been issued with a payroll number validation checks will be carried out on the Person record to ensure that they have these fields completed and the Person record cannot be saved without these fields completed.



## 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.



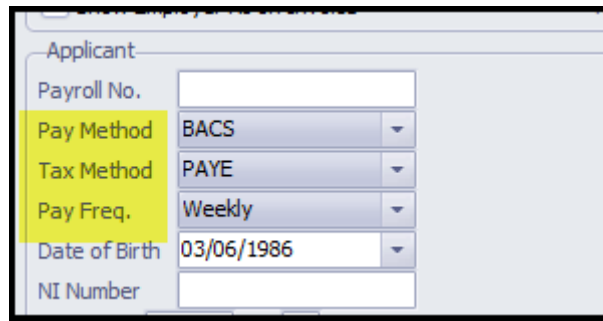
Font and background colours are assigned to different person states the colours will be visible in the company contact view.

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.



Applicant

Payroll No.

Pay Method

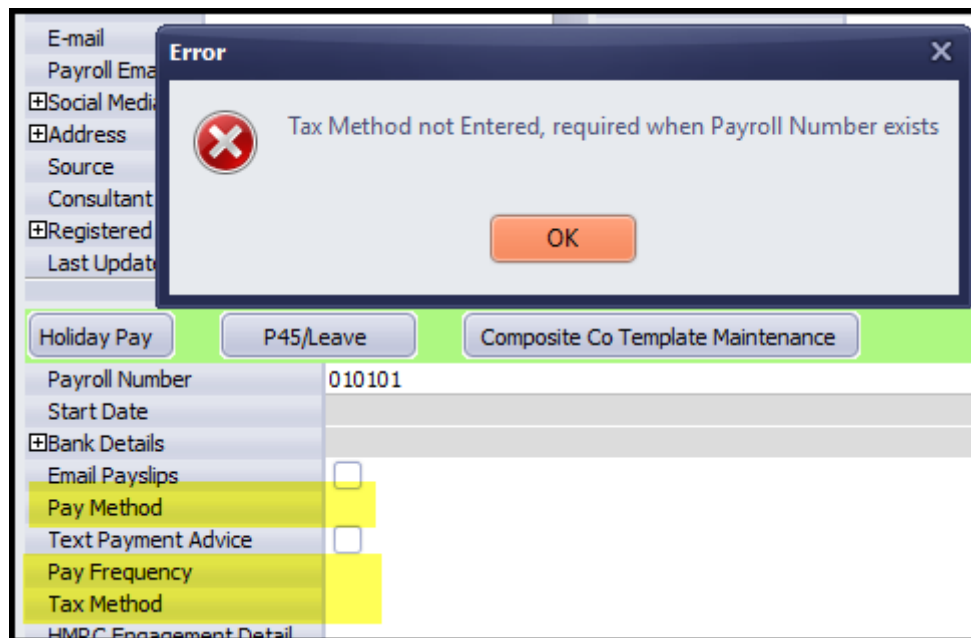
Tax Method

Pay Freq.

Date of Birth

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.



E-mail

Payroll Email

Social Media

Address

Source

Consultant

Registered

Last Update

Holiday Pay

P45/Leave

Composite Co Template Maintenance

Payroll Number 010101

Start Date

Bank Details

Email Payslips ☐

Pay Method

Text Payment Advice ☐

Pay Frequency

Tax Method

HMRC Engagement Detail

**Error**

Tax Method not Entered, required when Payroll Number exists

OK

## 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.

## Standardise Accord payslip viewing, add date filter

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

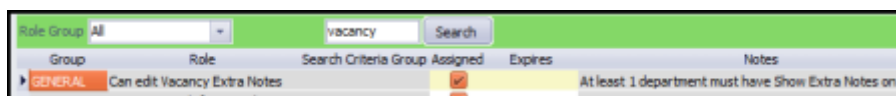


# System Administrator

## 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           | <div>AddDeleteHelp</div>                                                                                   |            |                                     |          |               |                          |            |                                     |
| Divisions          | <div>Applicant QuestionnaireVacancy QuestionnairePlacement QuestionnaireReference QuestionnaireTimes</div> |            |                                     |          |               |                          |            |                                     |
| Departments        |                                                                                                            |            |                                     |          |               |                          |            |                                     |
| Document Templates | ID                                                                                                         | Department | Searchable                          | Division | Analysis Code | Publish To Web           | Sort Order | Show Extra Notes                    |
| Document Types     | 0                                                                                                          | Null       | <input type="checkbox"/>            |          |               | <input type="checkbox"/> |            | <input type="checkbox"/>            |
| Phone Types        | DR                                                                                                         | Drivers    | <input checked="" type="checkbox"/> |          |               | <input type="checkbox"/> |            | <input checked="" type="checkbox"/> |
|                    | HE                                                                                                         | Health     | <input checked="" type="checkbox"/> |          |               | <input type="checkbox"/> |            | <input type="checkbox"/>            |
|                    |                                                                                                            |            | <input type="checkbox"/>            |          |               | <input type="checkbox"/> |            | <input type="checkbox"/>            |



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

The screenshot shows the 'Database Diagnostics' window. At the top, it says 'IQX licences in use: 1'. Below this are buttons for 'Refresh' and 'Close'. There are dropdown menus for 'Audit Type' (set to 'AUDIT'), 'Date' (28/03/2016), and 'to' (15/04/2016). There are also buttons for 'Count' and 'Export / Archive'. Below these is a table with the following data:

| 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.

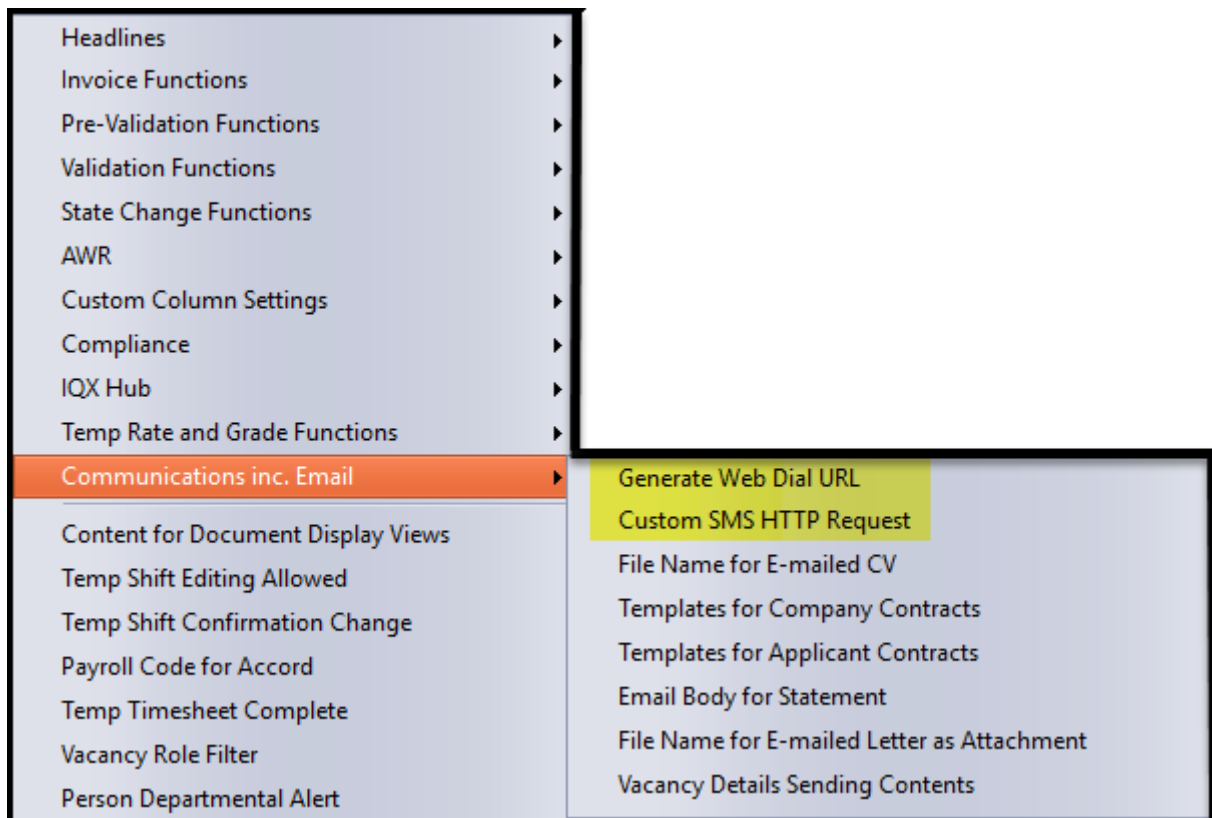
|            |                                     |   |
|------------|-------------------------------------|---|
| 1000 Temps | Show Shift (Our Ref) button on Main | N |
| 1010 Temps | Block editing Rates on Vacancy      | Y |

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              |
| <input type="checkbox"/> 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 |
|---------------|-------------------------------------|---|---------------------------------------------------------------------------------|

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

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

|                                                                    |                     |     |               |                          |                |                |               |                |
|--------------------------------------------------------------------|---------------------|-----|---------------|--------------------------|----------------|----------------|---------------|----------------|
| Questionnaire<br>Contact<br>Questionnaire<br>NotesV<br>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       | <input type="checkbox"/> | Operator       |                |               | 09/02/2015     |
|                                                                    | ▶ John Arthur Smith |     | Client/Can... | <input type="checkbox"/> | Branch Manager |                |               |                |

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