

Release 2.16.4

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.

A screenshot of a software interface showing a 'Person record'. The record is for a 'Consultant' named 'VHS'. The 'Registered' checkbox is checked. The 'Number' field is highlighted in yellow and contains the value '10039'. The 'Date' field is empty. The 'Last Updated' field contains the date and time '23/10/2015 14:04'. The 'Number' field is displayed in grey, indicating it is read-only.

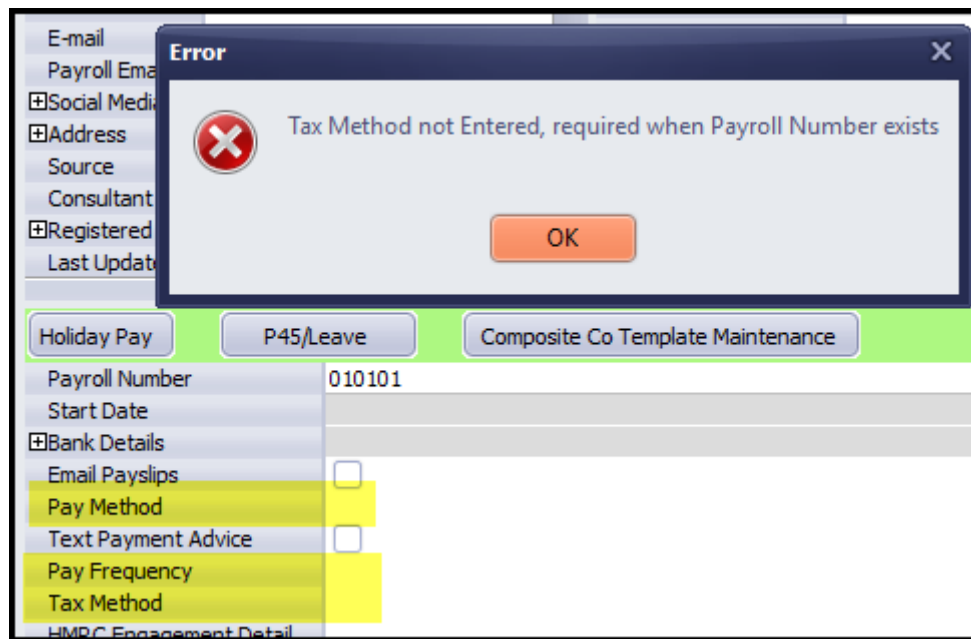
This requires System Administrator set up.

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.

A screenshot of a software interface showing an 'Applicant' form. The 'Payroll No.' field is empty. The 'Pay Method' dropdown menu is set to 'BACS'. The 'Tax Method' dropdown menu is set to 'PAYE'. The 'Pay Freq.' dropdown menu is set to 'Weekly'. The 'Date of Birth' dropdown menu is set to '03/06/1986'. The 'NI Number' field is empty.

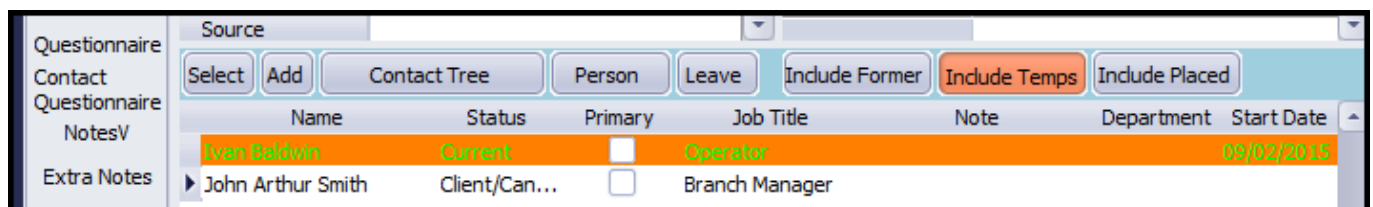
Once a candidate has been issued with a payroll number validation checks will be carried out on the Person record to ensure that they have these fields completed and the Person record cannot be saved without these fields completed.



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.



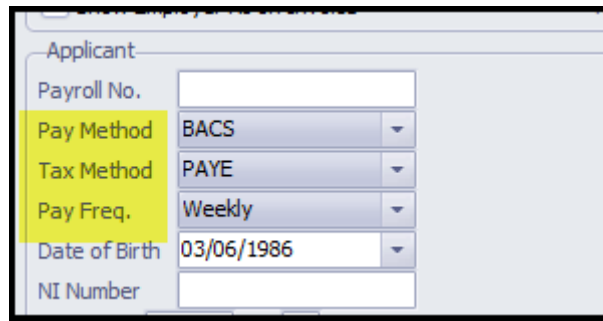
Font and background colours are assigned to different person states the colours will be visible in the company contact view.

Some System Administrator set up is required.

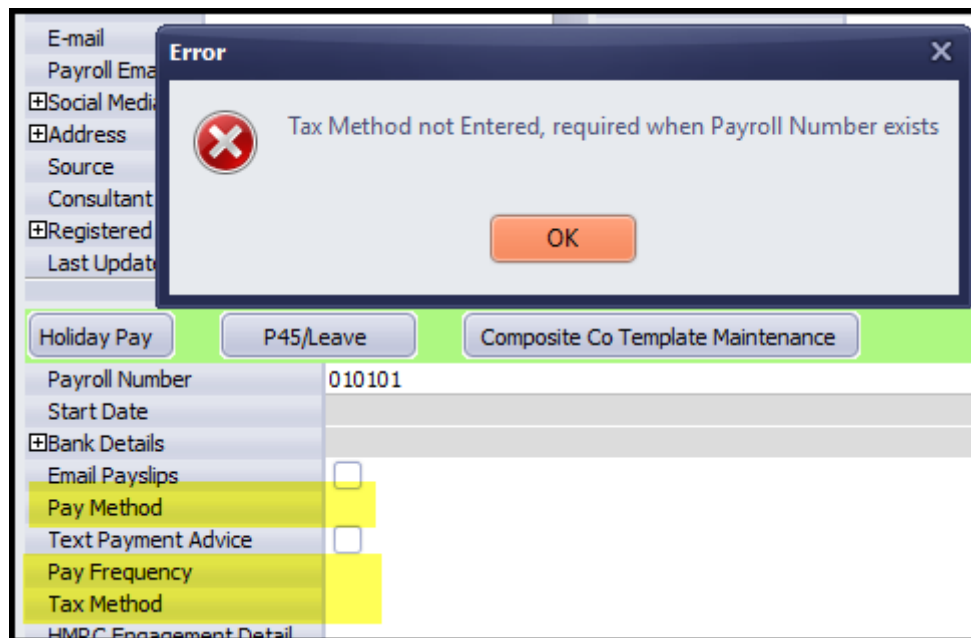
Accounts

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 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.

Role Group	All	vacancy	Search	
Group	Role	Search Criteria Group Assigned	Expires	Notes
GENERAL	Can edit Vacancy Extra Notes	☒		At least 1 department must have Show Extra Notes on

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
	0	Null	☐			☐		☐
Document Types	DR	Drivers	☒			☐		☒
Phone Types	HE	Health	☒			☐		☐

The Extra Notes title can be amended in Maintenance - General Settings - Terminology - No 760.

770 Terminology	Collection Child 2 Name	Sub-sub-Collection
780 Terminology	Vacancy Extra Notes	Extra Notes

Audit changes to department registration

Changes to Department registration can now be audited.

In Maintenance - Database Setup - Audit Items - Area - Person - Item = Department Registration:

Maintenance - Database Setup		
Save And Close	Abandon	Update
Dictionary of Searchable Data Items	Area	Person
Custom Word Merge Fields	Area	Item
Audit Items	Area	Item
Index Server	Person	AWR Exemption Reason
License	Person	Department Registration
Job Runner Schedule Group	Person	Payroll Company
	Person	Payroll Number
	Person	National Insurance Number

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



Database Diagnostics							
IQX licences in use: 1				Refresh	Close		
Database Details	Audit Type	AUDIT	Date	28/03/2016	to	15/04/2016	Count
Engine Details	Export / Archive						
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

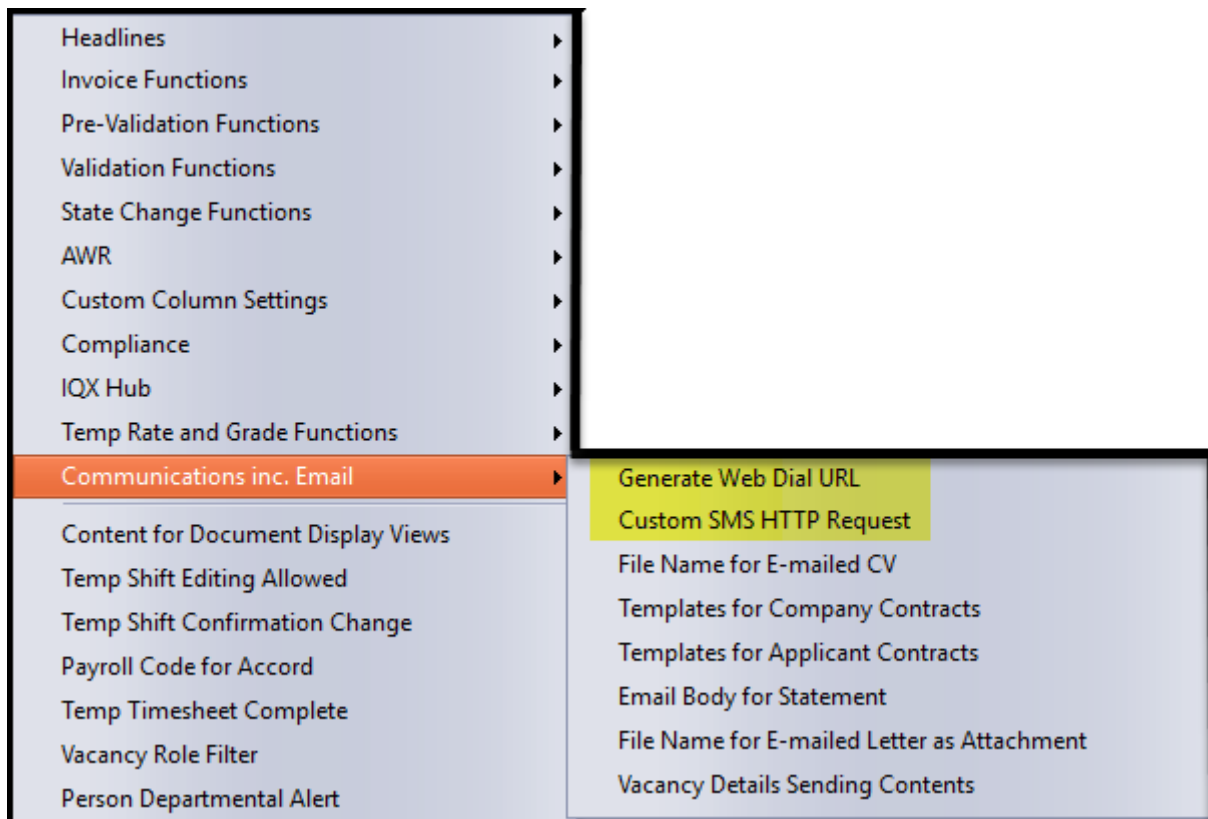
Where a user is allowed to either maintain schemes or override pay or charge rates is now possible to block changes to the vacancy rates using a switch in Maintenance - General Settings - Temps - 1010.

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

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	

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

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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