Release 2.16.12

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

Enhancements to Questionnaires

Questionnaires have been modified to allow the use of 60 characters in questions, choices and sub-choices.

In addition, font colours can be added to the questionnaire captions in Departmental and General questionnaires. The fonts are set up by adding a colour to the furthest right column of a question.

Departmental Questionnaire for companies

Departmental questionnaires for companies can now be added for each department. This functionality can be used target questions at a Department level and avoid having to scroll through long lists of irrelevant question in the Company form.

Image of companies button.

This requires System Administrator set up.

Multi-select extended to Reports

The multi-select functionality previously used in Mail Merge has been extended to Reports.

Select the records to be the focus of the report. Select the appropriate report. Choose either All records or Highlighted records from the drop down dialogue box and run the report.

Streamlining of CV creation in Template

The process of replacing a CV with one created from a CV template has been streamlined by combine existing functions to improve work flow and speed.

In a Person record – CV select replace CV – Confirm Replace CV – Choose whether to keep searchable text (keeping searchable text allows it to be inserted into the new CV) – CV Template view opens.

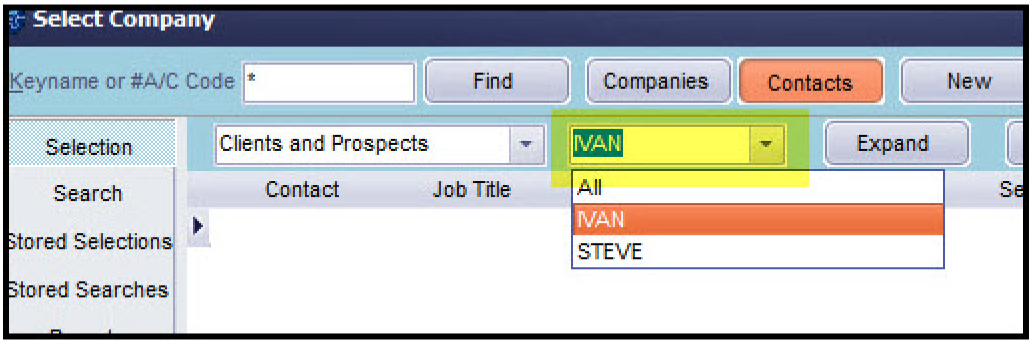
New Sales layout for Company Form

A new switch and role has been added to Company contacts so that Consultants can own contacts.

With the Sales consultant role contacts can be filtered using the drop down visible in the Companies – Contacts Selector.

111 Terminology	Sales Staff Name	Sales Consultant
112 Terminology	Sales Staff Plural Name	Sales Consultants

Contacts can be allocated in the top right view of a Company contact record.



Sales information can be viewed in a new tab in the left hand vertical tool bar.

Who’s interested – records the user details of a User who has added the contact to their favourites view. Ranged Activity – displays time banded data related to Contact Events, Interviews, Invoice Count and Value, Placements and Vacancies. Sales Questionnaire – Sales Questions set up using Sales Question grouping -100 in Company Questionnaire. Notes, Mailer Lists and Stored Sections are existing functionality.

This requires System Administrator set up.

Enhancement to Person Bulk Emails

It is possible to send simple html Bulk Emails with a signature and have contact events recorded against each recipient of the email.

This requires System Administrator set up.

Switch to apply CE combo filter to selectors

A User’s view of contact events in a record can be filtered according to their own Contact events or all.

The filter is set up in Users – Combo box filters.

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The filter is applied in a record by selecting yes in the Own Type drop down in Company, Company Contacts, Person and Vacancy record view.

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The filter will display those Contact Events matching the combo box type and Contact events without a combo box filter.

Accounts Colour

With the addition of Self Billing functionality the option to differentiate between Self Billing and standard views has been added to avoid confusion.

This requires System Administrator set up.

Extend make auto Contact Event functionality to Availability entered via Diary

Auto Contact event functionality has been extended to Availability set in Diary.

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The Contact Events differentiate between Availability, Unavailability and Holidays.

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If the same availability type e.g. holidays, is added consecutively only one contact event will be generated.

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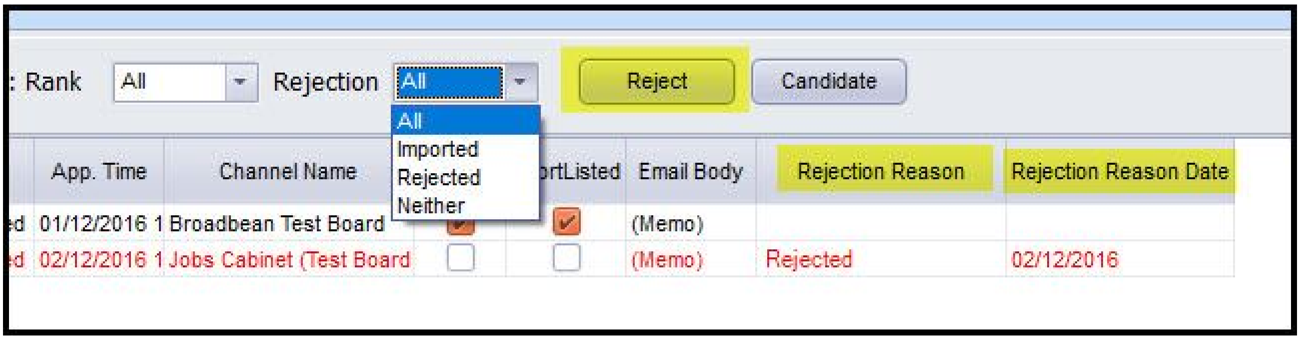
Broadbean - rejection (non import) reason

When reviewing Broadbean Vacancy applications, the reason for rejecting a candidate can be recorded and is displayed on the far right of the Broadbean Import view



This requires System Administrator set up.

Vacancy - Shift Progress

In Vacancy - Shift Progress a new Fill button has been added which opens up the Fill Vacancy wizard allowing another route to booking a candidate to a vacancy.

In addition, a new column ‘Our Ref has been added along with a Hide Filled (shift) button.

Image .

Ability to control colour of Notes on Outlook bar

It is now possible to amended the colour of Memo Type items in the Outlook bar in a record. E.g. Notes, Extra Notes.

The change of colour is activated when text has been entered into that field.

This requires System Administrator set up.

Person compliance staff

It is now possible to assign consultants as compliance consultant in a Person record.

Images of New view.

This requires System Administrator set up.

Person compliance staff

More explanation has been added when connections fails. There are four different types of failure and each having different warning messages.

- When a wrong user id or password is entered the warning message will be - 'Invalid username or password'.

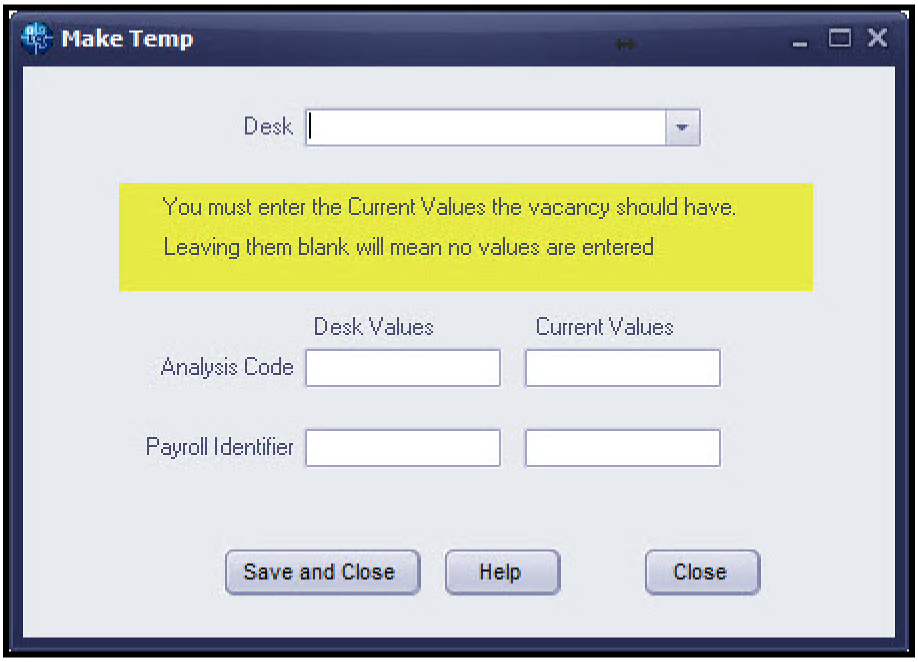
- If a user tries to login using a defunct user login the message will be - 'User is not currently authorised'.
- If trying to login to a missing database or the wrong database this warning message will appear - Database name incorrect or not set up'.
- Any other form of error will produce - 'Database connection error' with a button for further details.

Add to Pop Up notification Days as well as Minutes

Pop up notifications can now be set in days as well as minutes. The maximum number of days that can be set is 21 days or 30240 minutes.

Clearer message needed when making a perm vacancy temp

When converting a vacancy from permanent to temporary a warning to enter Current Values for the Vacancy has been added to inform users that Leaving the Make Temp values blank will result in no values being entered.



Add background colour to shift if has a shift progress link

When in Temp Desk – Shifts, it is possible to have a visual check of which shifts have short lists attached to them.

This requires System Administrator set up.

Improve notifications when a timesheet query ("TS Query") is raised

When a query is raised by an Accounts user against a provisional timesheet it is possible to have a popup generated which is sent to all users in the same tempdesk provided they do not have an Accounts role.

The existing Temp Desk queries message on Temp Desk also now shows a count of Timesheet queries.

This requires System Administrator set up.

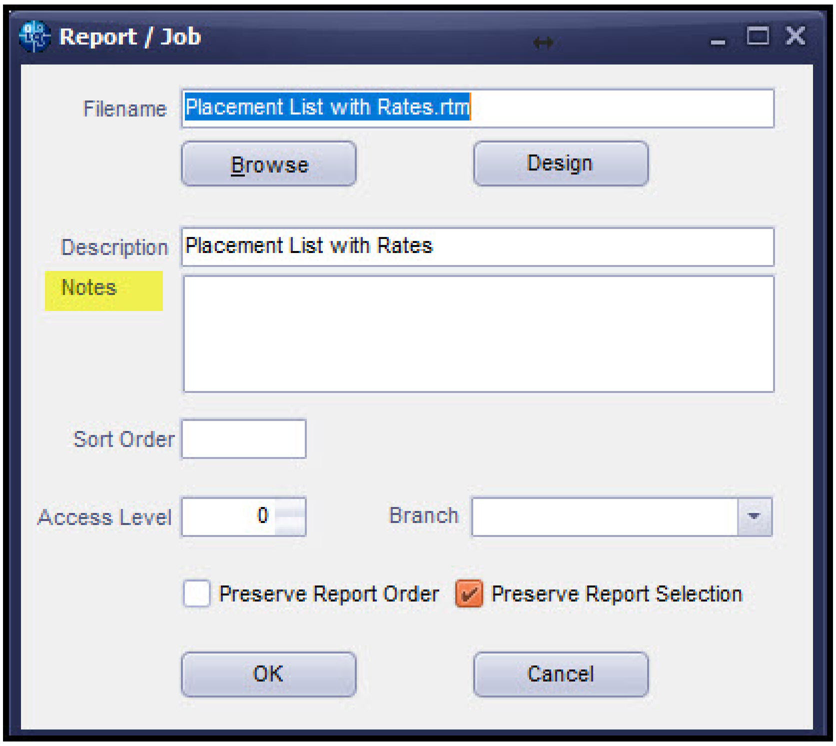
Size Limit for Documents being added

Compliance and other documents can have a maximum file size set to stop over large files being saved to the database.

This requires System Administrator set up.

Basic reports view, adding notes column

In reports view a notes column has been added so that additional information can be entered against a report. The Notes column is populated by selecting a report and clicking edit. The Notes section can be filled in the next dialogue box.



Single sign on

It is now possible to log into IQX using Active Directory protocols. Therefore provided a user has the required permissions and security setup clicking on the IQX icon will silently log the user into IQX.

Where there is an error with the Active Directory setup the login will default to a standard login dialogue box.

Active Directory setup will require System Administrator/IT department set up.

[May need additional information. Ivan needs to discuss with Sean]

Bulk CV Import Candidate State

When using Bulk CV import it is possible to set the initial state for perm and temp candidates through partial filtering.

This requires System Administrator set up.

Broadbean candidate download prob is pdf cv

Broadbean candidates can submit CVs in pdf format. IQX has been updated to allow the information contained in pdf CVs to be imported into IQX.

When a pdf CV is imported into IQX a warning message appears warning it will be XMLd.

Users are warned to check the CV data as the XML process affects the display of CV data. When in IQX the pdf will be recorded in Person – Document as Broadbean CV with file type pdf.

A new tab, Broadbean, on the outlook view beneath Audit Trail records Broadbean status of applications.

The CV Text is stored in Person - CV.

The CV Text can be used to create a doc cv.

Vacancy Teams, view on Desktop

In desk top consultants can have their default view set to their vacancy teams instead of their consultant view.

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New tab on DeskTop to track potential vacancies

A new tab under Current Vacancies for Tracked Vacancies can now be added to track a different Vacancy state than Current Vacancy.

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System Administrator

Departmental Questionnaire for companies

Departmental questionnaires for companies can now be added for each department. This functionality can be used target questions at a Department level and avoid having to scroll through long lists of irrelevant question in the Company form.

This is set up in the usual way via Agency Setup – Departments – Select department – Companies button.

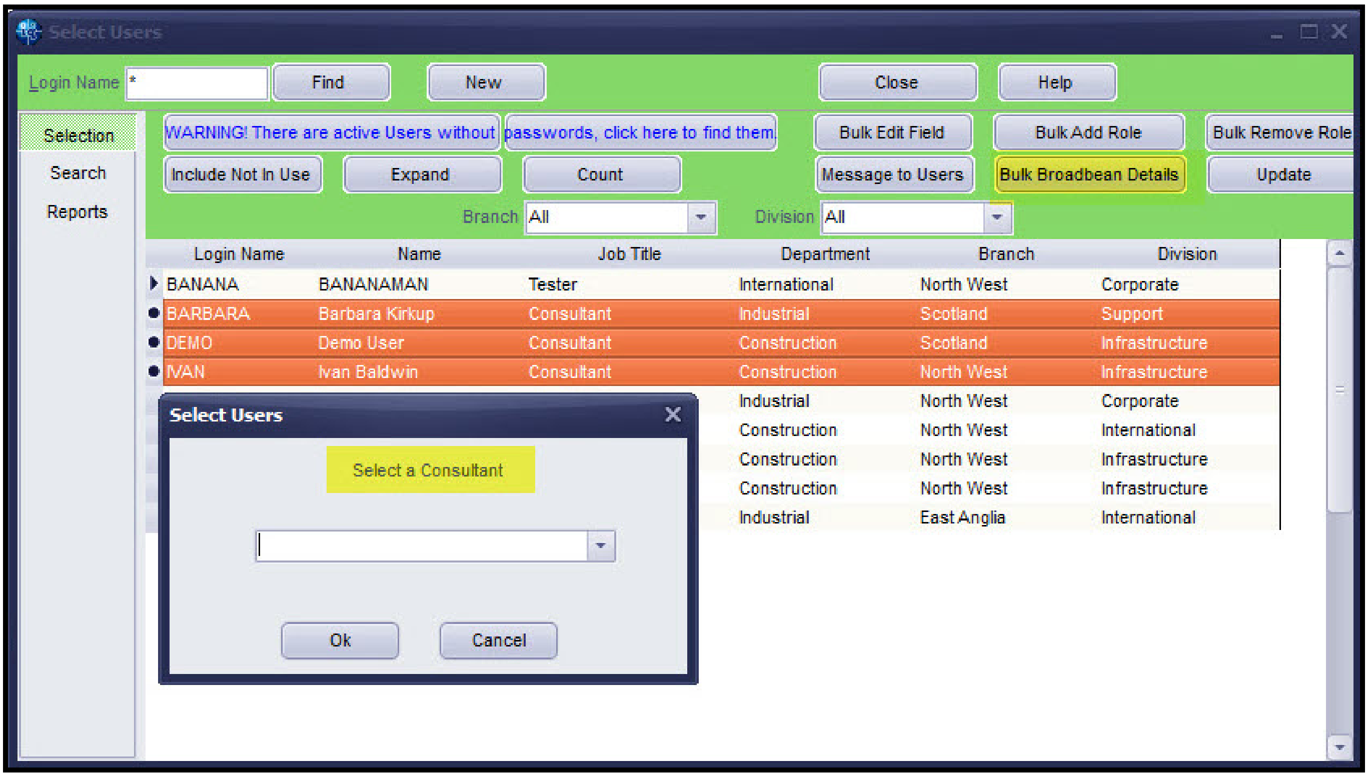
Image of companies button.

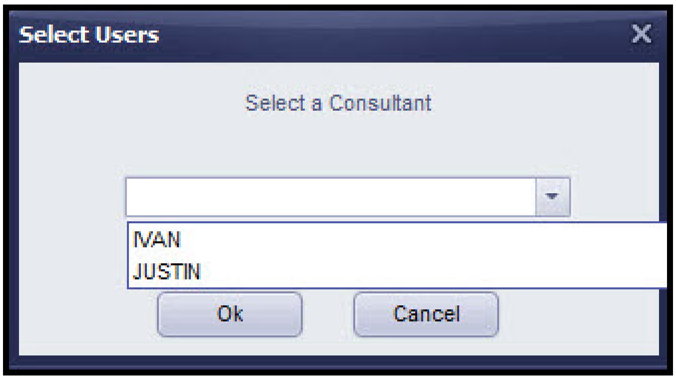
Bulk Update of Broadbean User role

Adding Broadbean User roles to many staff can now be done using the Bulk Broadbean Details button in Maintenance – Users.

Select the Users who require updating. Click the Bulk Broadbean Details button and select the consultant whose details you wish to copy.

Image of Select Users/Broadbean button.





Mailchimp Enhancements

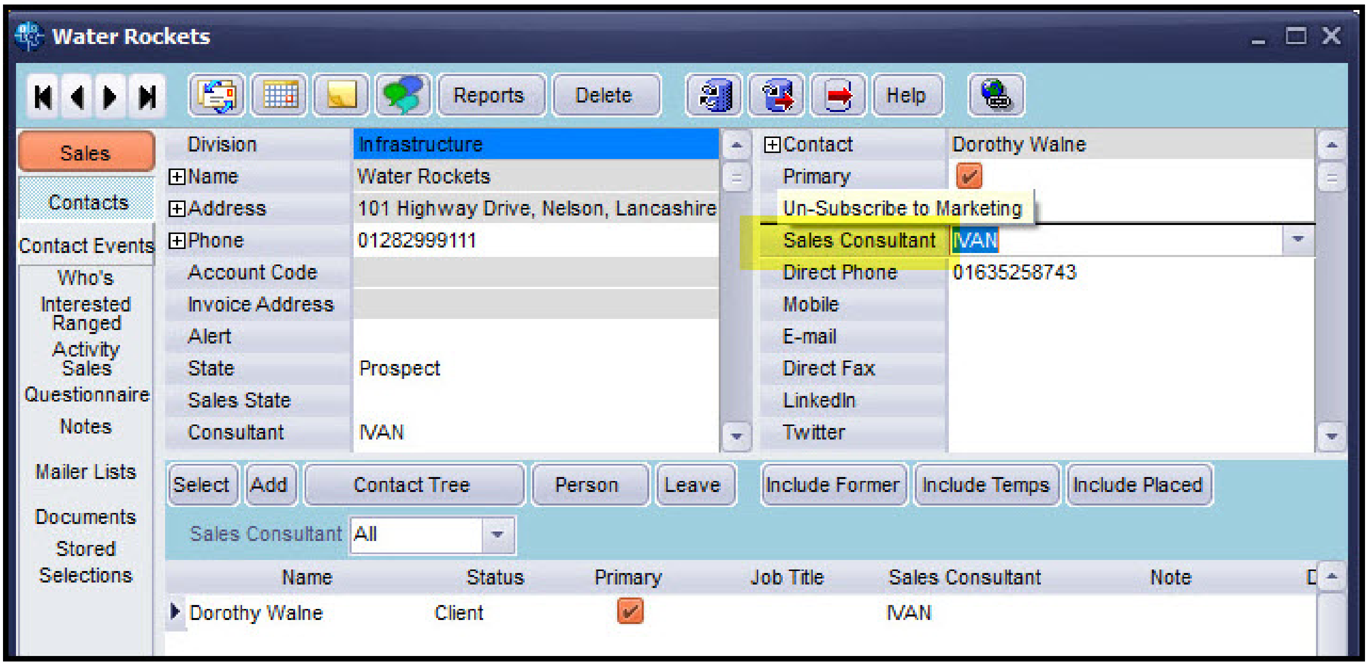
Mailchimp have updated their API to v3.0 and from January 2017 v2.0 will not be supported by Mailchimp.

IQX has been updated to accommodate this change. Companies using Mailchimp should have received their new Mailchimp API from Mail chimp.

New Sales layout for Company Form

A new switch and role has been added to Company contacts so that Consultants can own contacts.

The role can be added in Maintenance – Users. In this example the role is called Sales consultant. The Terminology can be amended in General Settings - Terminology – 111 and 112.



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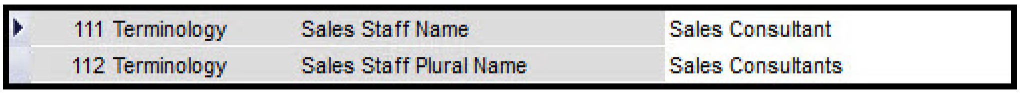

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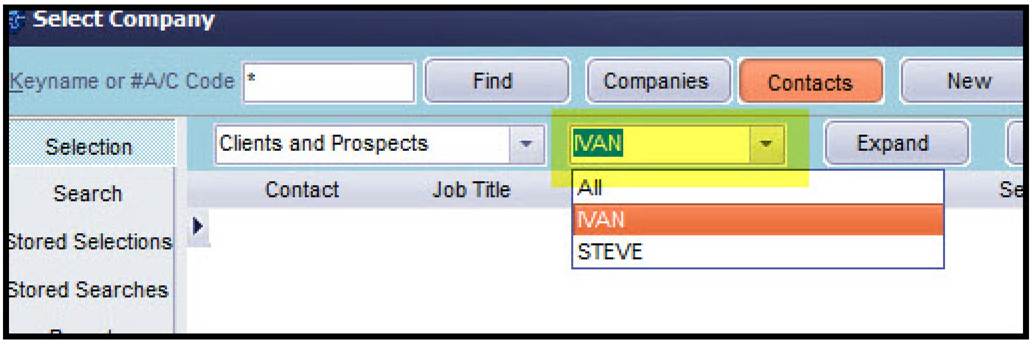

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Enhancement to Person Bulk Emails

It is possible to send simple html Bulk Emails with a signature and have contact events recorded against each recipient of the email.

The Role is set up in Maintenance - Users – Send Bulk Emails. Please note it requires HTTP Email to be set up or nothing is sent.

Switch to apply CE combo filter to selectors

A User's view of contact events in a record can be filtered according to their own Contact events or all.

The filter is set up in Users – Combo box filters.

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The filter is applied in a record by selecting yes in the Own Type drop down in Company, Company Contacts, Person and Vacancy record view.

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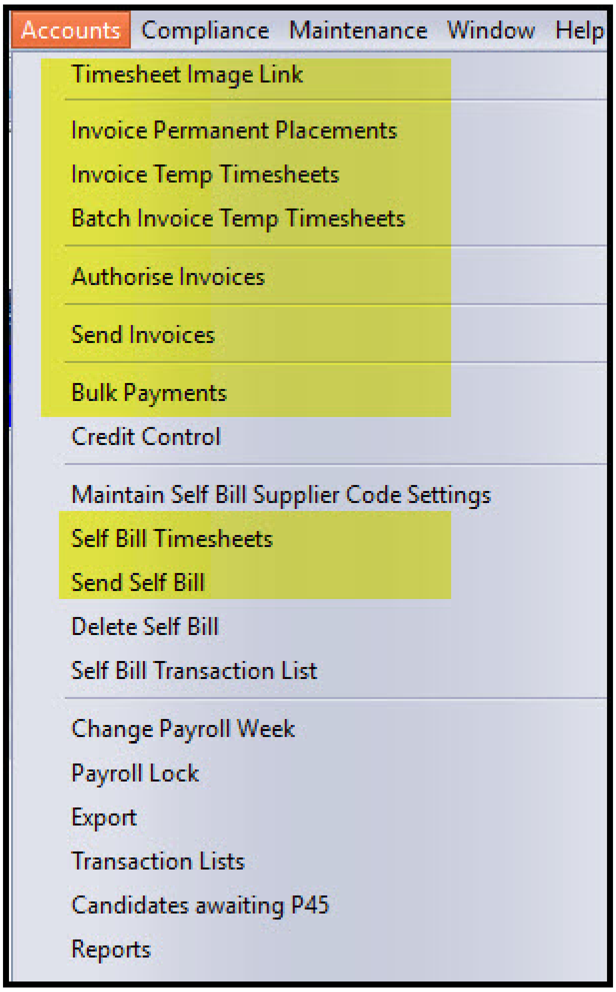
The filter will display those Contact Events matching the combo box type and Contact events without a combo box filter.

Accounts Colour

With the addition of Self Billing functionality the option to differentiate between Self Billing and standard views has been added to avoid confusion.

Therefore, in General Settings – Colours – 510 and 520 form colours can be added.

In the image below the first block is controlled by Colours – 510 and the second by Colours – 520



Extend make auto Contact Event functionality to Availability entered via Diary

Auto Contact event functionality has been extended to Availability set in Diary.

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The Contact event type used for these Contact Events is set up in General Settings – Temps – 440.

The Contact Events differentiate between Availability, Unavailability and Holidays.

Image

If the same availability type e.g. holidays, is added consecutively only one contact event will be generated.

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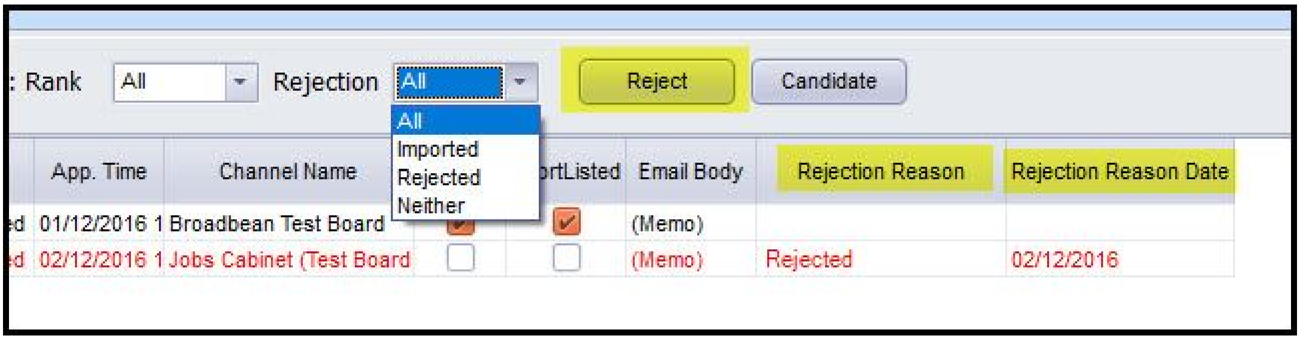
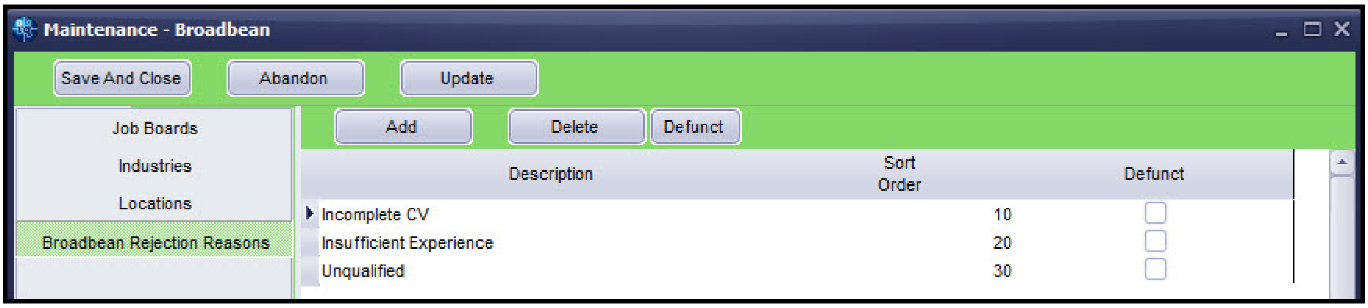
When reviewing Broadbean Vacancy applications, the reason for rejecting a candidate can be recorded and is displayed on the far right of the Broadbean Import view

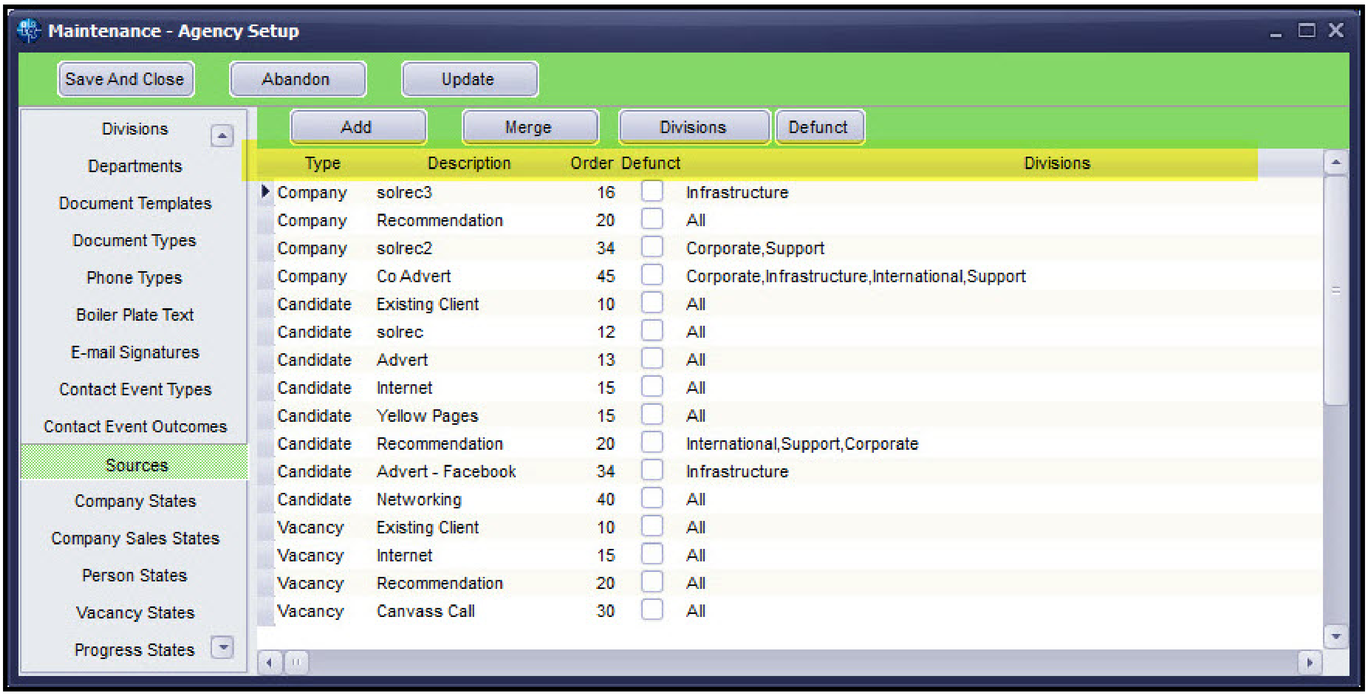


The reasons can be set up in Maintenance – Agency Setup – Rejection Reason



Source Maintenance

In order to provide flexibility in naming sources for different record types (Company, Vacancy, Candidate) and providing the option to allocate sources to divisions Agency Setup – Sources have changed.

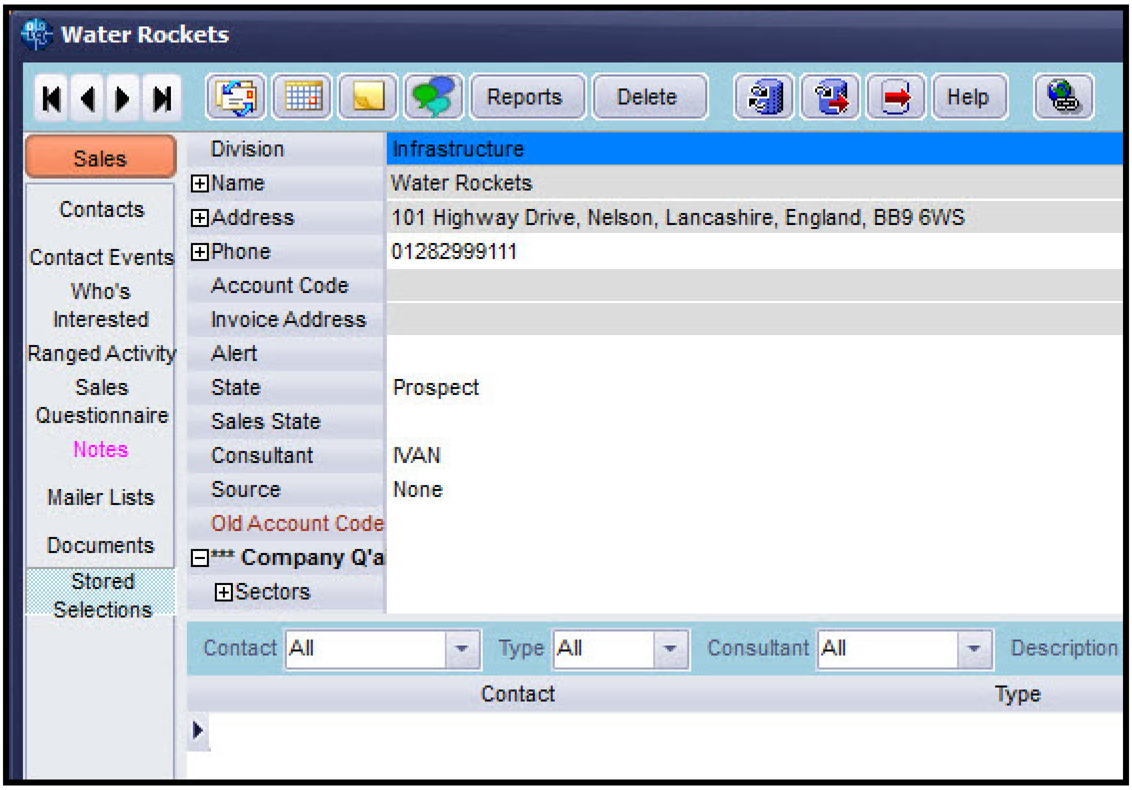


The function of sources within records has not changed.

However, the migration of source data from the vacancy class table to the originid table has the potential to break validations, reports, searches etc using the vacancyclass table. Please contact IQX for support in modifying such reports etc.

Ability to control colour of Notes on Outlook bar

Using General Settings – Colours – 530 Memo Colour it is now possible to amended the colour of Memo Type items in the Outlook bar in a record. E.g. Notes, Extra Notes.



The change of colour is activated when text has been entered into that field.

Person compliance staff

It is now possible to assign consultants as compliance consultant in a Person record.

This functionality is activated in General Settings - Settings 2030 – Y whence a new field will become visible under consultant in left window of a Person view. The consultant appearing in this drop down list will all have a Compliance user role of ‘Can maintain Clearance/Compliance’

Images of Settings and New view.

Person compliance staff

More explanation has been added when connections fails. There are four different types of failure and each having different warning messages.

- When a wrong user id or password is entered the warning message will be - 'Invalid username or password'.
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Pop up notifications can now be set in days as well as minutes. The maximum number of days that can be set is 21 days or 30240 minutes.

Add background colour to shift if has a shift progress link

When in Temp Desk – Shifts, it is possible to have a visual check of which shifts have short lists attached to them.

A background colour set up in General Settings – Colour 60 will add that colour to the background of shifts with Short lists.

Improve notifications when a timesheet query ("TS Query") is raised

When a query is raised by an Accounts user against a provisional timesheet it is possible to have a popup generated which is sent to all users in the same tempdesk provided they do not have an Accounts role.

To set this up set General Settings – Temps 1070 to Y. In addition, No Popups will need to be set by inserting 0 against Switchable Fields 1340. The existing Temp Desk queries message on Temp Desk also now shows a count of Timesheet queries.

Size Limit for Documents being added

Compliance and other documents can have a maximum file size set to stop over large files being saved to the database. The maximum file sizes (in Kb) can be set in General Settings 2050 and 2060. Blank or) gives no limit to the maximum file size.

Single sign on

It is now possible to log into IQX using Active Directory protocols. Therefore provided a user has the required permissions and security setup clicking on the IQX icon will silently log the user into IQX.

Where there is an error with the Active Directory setup the login will default to a standard login dialogue box.

To set up IQX to permit silent login enter the required domain information into General settings - Security settings 20 and 25.

Active Directory setup will require System Administrator/IT department set up.

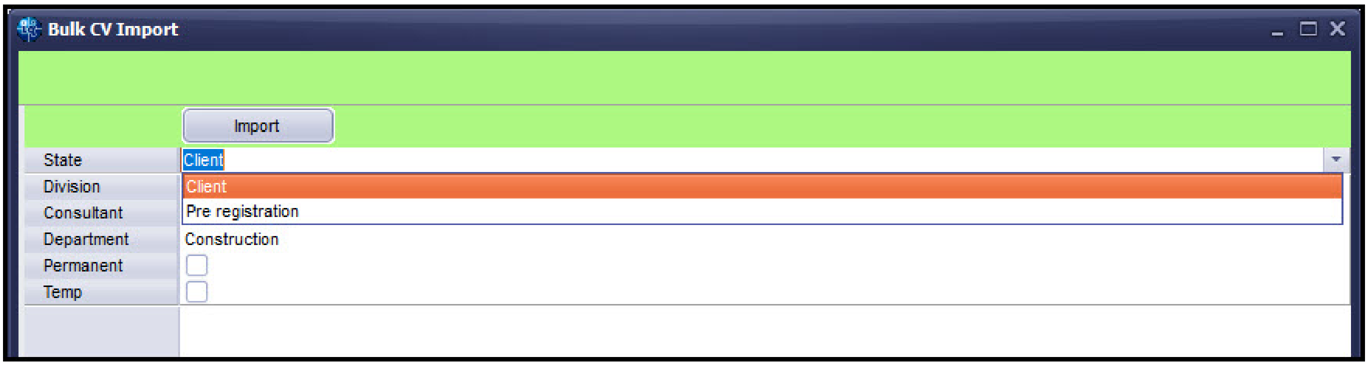
[May need additional information. Ivan needs to discuss with Sean]

Bulk CV Import Candidate State

When using Bulk CV import it is possible to set the initial state for perm and temp candidates through partial filtering.

In General Settings - Settings 1410 the initial status for perm candidates can be set.

In Agency Setup - Miscellaneous Settings the initial temp status is selected.



If perm is set to Null, then all the statuses will be listed in Bulk CV Import.

The error message 'You must select the Temp Initial Status' will appear if the import button is pressed, the temp tick box is clicked and the State differs from that set in Agency Setup.

Support for DTKBarReader.dll unlimited licence - System Admin

IQX has been updated to take advantage of the unlimited licence for the bar code reading dll -

DTKBarReader.dll. This useful for users of Job Runner.

Vacancy Teams, view on Desktop

In desk top consultants can have their default view set to their vacancy teams instead of their consultant view.

Image

This is set up by setting General Settings - Settings 2040 -Default Deskup Consultant to In-Team- Y. Settings 1450 - Allow Vacancy Team must also be set to Y.

New tab on DeskTop to track potential vacancies

A new tab under Current Vacancies for Tracked Vacancies can now be added to track a different Vacancy state than Current Vacancy.

IImage

General Settings - Settings - 2070 is used to set the Tracked Vacancy state.

Image

If Settings 2070 is left blank the Tracked Vacancy tab is not visible.