



Release 2.16.8

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.

- [User](#)
- [System Administrator](#)
- [Fixes and Enhancements](#)

Users

CV sending - Function can block

Pre-validation functions can now be set to block sending out of Candidate CVs as per agency requirements.

The function is called when adding CV to contact event and CV sending from Vacancy - Shortlist.

This requires System Administrator set up.

Timesheet Entry, Shifts - Cancel Button added

A **Cancel Shift** button has been added to timesheets.

Our Ref	Date	From	To	Break (Mins)	Hours	Pay	Bill	Grade	AWR?	Ltd?	Their Ref	Note	Shift Type	Cle
15311	Mon 04/07/2016	07:00	18:00	0	11.00		☒		N	Y			Test	
15312	Tue 05/07/2016	07:00	18:00	0	11.00		☒		N	Y			Test	
15313	Wed 06/07/2016	07:00	18:00	0	11.00		☒		N	Y			Test	
15314	Thu 07/07/2016	07:00	18:00	0	11.00		☒		N	Y			Test	
15315	Fri 08/07/2016	07:00	18:00	0	11.00		☒		N	Y			Test	

This allows users to cancel shifts at the point of processing timesheets.

Note: The **Delete Shift** button deletes shifts that have been added by the **Add Shifts** button at this stage.

Non Accounts users can change initial HMRC engagement detail

A User can change a candidate's initial HMRC engagement detail without Accounts Clerk user rights.

Note: This only allows non Accounts Clerk users to set HMRC engagement details if the field is blank or set to None.

This requires System Administrator set up.



Invoice PDF Security - No password option

Invoices created against a Company in IQX can now be set to **No Password** which removes security protection to pdfs generated for that Company.

Statement E-mail	
PO Number Required on Timesheets	☐
PO Number Required on Invoices	☐
Invoice Distribution	Post
Web Contract Start Date	
Document Pack	
Override Invoice Layout	
Invoice PDF Create	☐
Invoice PDF add Timesheets	☐
PDF Security	
Fixed NI percent	Standard
WTR percent	Allow Content Copying (Less)
AWR NI percent	No Password
AWR WTR percent	

This can be set in Company - Accounts - PDF Security.

Person Search a new full width line for CV Boolean Search

In Person - Search a full width search line can be added which will allow users to search for candidates.

Select Person	
Keyname or Number	
Find	New
Close	Help
Selection	Criteria Hints Clear
Department	Industrial
Perm	Temp
Either	Search
Search	CV Text
Stored Selections	All of:
Stored Searches	Any of:
Reports	

This requires System Administrator set up.

Unavailable reason on temp desk temps view

A new switch has been added to allow additional information on candidate unavailability and availability to be shown in Temps Desk - Temps.



Search	Expand	Holiday Pay	Current Pool	Available	Unavailable	On Holiday	?		Timesheet	
Temp Desk Pool(s)		Temp	Monday 05/09/2016	Tuesday 06/09/2016	Wednesday 07/09/2016	Thursday 08/09/2016	Friday 09/09/2016	Saturday 10/09/2016	Sunday 11/09/2016	Alert
► Healthcare		Jones, Bridget	A:Day 07:0...	U:Rest	A:Early 05:0...	U:Rest	A:Late 12:0...	U:Rest	A:No respo...	

Unavailability will be displayed as U: Unavailability Reason will show eg U:Rest instead of Unavailable. Availability will be displayed according to the Availability Template e.g. A:Day or Available where no template is selected.

Copy Shift, restrict access to buttons

A new switch has been added to hide the option for copying all in Copy Temp - Shifts.

The dialog box 'Copy Temp Shifts' has a close button (X) in the top right corner. It contains the following fields and options:

- Temp Desk:** Industrial Drivers
- From Year:** 2016
- Week:** 14
- To Year:** 2016
- Week:** 15
- Options:**
 - ☒ All
 - ☐ Selected Only
 - ☐ All Except Selected
- ☐ Fill with same Temp where available
- Buttons:** Ok, Cancel, Help

Vacancy, Cascaded Shifts - Default sort order changed

The default sort order for Vacancy - Cascaded Shift has been changed to show the newest cascade time and newest shift date are at the top of the display.

Bulk Text message - request to put the Notes data into Summary of Auto Contact Event

When a bulk text message is sent and an auto CE made the details are now included in the CE Summary rather than having to open to see in the details.

Type	Company	Contact	Candidate	Consultant	Date	Position	Callback	Summary	Outcome
Text mes...			Laura Clark	IVAN	22/08/2016			Text message:This is a test confirmation. Please do not respon...	
Text mes...			June Brown	IVAN	22/08/2016			Text message:This is a test confirmation. Please do not respon...	
Text mes...			Ivan Baldwin	IVAN	22/08/2016			Text message:This is a test confirmation. Please do not respon...	
Text mes...	Darkstorm Tra...	Jadene Robins...	Lee Evans	IVAN	22/08/2016	Packing Shif...		Text sent from confirmation	

This is currently available for SMS messages.

Adding Progress where Interview box is ticked to bring up Unavailability list

When a Temp candidate has an interview set in Progress it is easier to record their unavailability.



To use this feature, select a Progress record and set the Candidate State to Interview, (System Administrator set up required). Set an interview date and time. Save and Close.

Progress of Jessica Adams re. Financial Accountant at Trust Group Ltd.

Navigation: Placement, Reports, Delete, Help

Contact Events

History, Location Map, Directions, Appointments, Documents, Chat

State: Invite to 1st Interview

Action Date, Action Time

Candidate: Jessica Adams

Company: Trust Group Ltd., Sarah Miso

Vacancy: Financial Accountant

Consultant: BARBARA

Interview Date: 03/09/2016

Interview Time: 09:31

Expand, Process

Consultant, Contact Type, Date, Time

The Unavailability view will open.

Unavailability for Jessica Adams

From: 29/08/2016 to: 04/09/2016

Reason: Unknown

Pattern

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☒ Friday ☒ Saturday ☐ Sunday

Monday to Friday, Every Day, Clear

Contact again on: 20/12/2009

AWR Notes

Save & Close, Save & Continue, Close

Will not refresh underlying form.

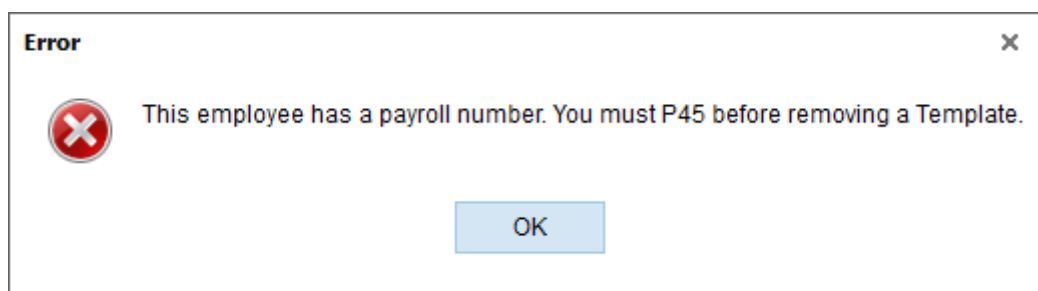


The candidate's unavailability date and time can be recorded. Their unavailability can be viewed in Person- Diary and Person - Availability.

Person, Payroll - Block composite change when need P45

Changes to Composite Company Templates are blocked when a Candidate has a tax method set to PAYE and has a payroll number until they have their current employment ended.

An error message that will appear if a P45 is required before assigning or removing a Template.



Person, Details - Read only Created Date added

A new field has been added to the Person record which will record the date the file was created.

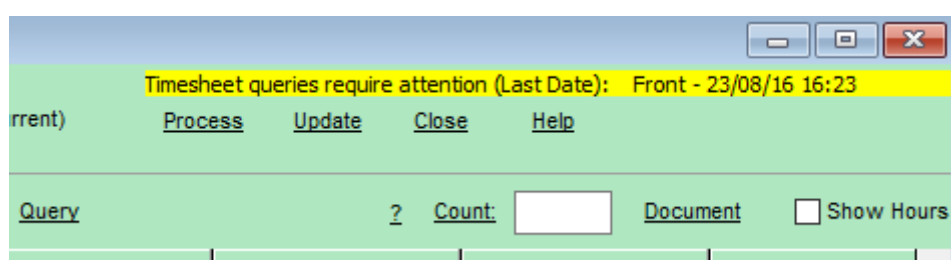
Source	Visit
Consultant	IVAN
☐ Registered	No. 10814 Date 04/07/2016
Number	10814
Date	04/07/2016
Created	06/07/2016
Last Updated	18/07/2016 11:39

This field cannot be edited.

Timesheet Query warning on Temp Desk added count

When a timesheet is queried and sent from the Back Office to the Front Office a warning that Timesheets require review appears on the Temp Desk view highlighted in yellow.

This information has now been modified to show a time stamp of the most recent query added.





Shift Questionnaires

It is now possible to add shift questions in the temps desk shift view.

To use, go to Temp desk - Shifts - Questionnaire.

This requires System Administrator setup.

Details	Quick Fill	Short List	Cascade History	Audit Trail	Questionnaire
☐ Construction - D - Health and Safety					
— Construction - D - Special Safety R Yes					
— Construction - D - Describe require Cherry picker certification required					
— Construction - D - Review shift arr 30/11/2016					
— Construction - D - Health and Safe CSCS					
☒ Construction - D - H&S equipment Hardhat, Safety Boots, Gloves, Hi Viz					
— Construction - D - Safety mask cat FFP3					
☐ G - Travel Plan Survey					
— G - Location confirmed? Y					
— G - Specific location? 101 Main street, Westerhope					
☒ G - Method/s of transport? Bus, Walk					
— G - Update travel survey 30/11/2016					
— G - Time taken to get to site Less than 30 mins					

Note: Department questions are displayed above general questions. If no questions are setup the questionnaire tab in Temp desk - Shifts will not be displayed.

System Administrator

CV sending - Function can block

Pre-validation functions can now be set to block sending out of Candidate CVs as per agency requirements.

The function is called when adding CV to contact event and CV sending from Vacancy - Shortlist.

The function is accessed in Maintenance - Database Functions – Pre-validation Functions.

Blobstore, file size stored

New functionality has been added to the Blobstore table in the database. A numeric field has been added to Blobstore to record the file size. This field is updated when blobs are created or updated.



The screenshot shows the Sybase Central application window. The menu bar includes File, Edit, View, Tools, Connections, Mode, and Help. The toolbar contains various icons for navigation and editing. The context bar shows the path: Sybase Central/SQL Anywhere 16/2168s/2168s - pears/Tables/blobstore (pears). The main area displays a table with columns: Columns, Constraints, Referencing Constraints, Indexes, Text Indexes, Triggers, and Privileges. The table data is as follows:

Columns	Constraints	Referencing Constraints	Indexes	Text Indexes	Triggers	Privileges
1	AddToInvPDF	0	CVSendOutApproved	0	ExternalFilePath	Optimised
2		0		0	(NULL)	(NULL)
3		0		0	(NULL)	(NULL)

A job would be needed to get figures for existing blobs.

Non Accounts users can change initial HMRC engagement detail

A User can change a candidate's initial HMRC engagement detail without Accounts Clerk user rights.

Note: This only allows non Accounts Clerk users to set HMRC engagement details if the field is blank or set to None.

This is permitted via Maintenance - General Settings - Temps - 1020 - Y.

Invoice PDF Security - No password option

Invoices created against a Company in IQX can now be set to **No Password** which removes security protection to pdfs generated for that Company.

The screenshot shows the PDF Security settings form. The form has a list of settings on the left and a corresponding value on the right. The settings are:

- Statement E-mail
- PO Number Required on Timesheets
- PO Number Required on Invoices
- Invoice Distribution
- Web Contract Start Date
- Document Pack
- Override Invoice Layout
- Invoice PDF Create
- Invoice PDF add Timesheets
- PDF Security
- Fixed NI percent
- WTR percent
- AWR NI percent
- AWR WTR percent

The values for these settings are:

- Statement E-mail
- PO Number Required on Timesheets
- PO Number Required on Invoices
- Invoice Distribution
- Web Contract Start Date
- Document Pack
- Override Invoice Layout
- Invoice PDF Create
- Invoice PDF add Timesheets
- PDF Security
- Fixed NI percent
- WTR percent
- AWR NI percent
- AWR WTR percent

This can be set in Company - Accounts - PDF Security.



Person Search a new full width line for CV Boolean Search

In Person – Search a full width search line can be added which will allow users to search for candidates.

This feature can be set up in Maintenance – General Settings – Settings 2020.

The text index can be set up by running the following in Maintenance – SQL Tool.

```
CREATE TEXT INDEX "cvindex" ON "pears"."Person" ( "cvtext" ) IN "system"
CONFIGURATION "SYS"."default_char";
```

Note: this feature requires Sybase SQLA 11+.

Unavailable reason on temp desk temps view

A new switch has been added to allow additional information on candidate unavailability and availability to be shown in Temps Desk – Temps.

Search	Expand	Holiday Pay	Current Pool	Available	Unavailable	On Holiday	?	Timesheet	
Temp Desk Pool(s)	Temp	Monday 05/09/2016	Tuesday 06/09/2016	Wednesday 07/09/2016	Thursday 08/09/2016	Friday 09/09/2016	Saturday 10/09/2016	Sunday 11/09/2016	Alert
▶ Healthcare	Jones, Bridget	A:Day 07:0...	U:Rest	A:Early 05:0...	U:Rest	A:Late 12:0...	U:Rest	A:No respo...	

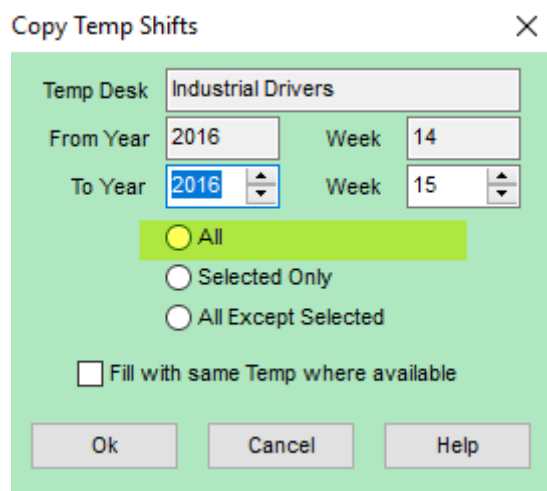
Unavailability will be displayed as U: Unavailability Reason will show eg U:Rest instead of Unavailable. Availability will be displayed according to the Availability Template e.g. A:Day or Available where no template is selected.

This is set up in in General Settings - Temps 1060.

1050 Temps	Hide All Button on Copy Temp Shift	N
▶ 1060 Temps	Display Unavailability Reason	Y

Copy Shift, restrict access to buttons

A new switch has been added to hide the option for copying all in Copy Temp - Shifts.



Copy Temp Shifts

Temp Desk: Industrial Drivers

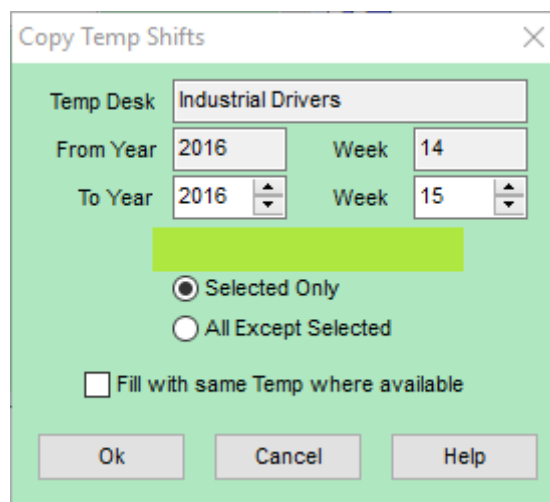
From Year: 2016 Week: 14

To Year: 2016 Week: 15

☒ All
☐ Selected Only
☐ All Except Selected

☐ Fill with same Temp where available

Ok Cancel Help



Copy Temp Shifts

Temp Desk: Industrial Drivers

From Year: 2016 Week: 14

To Year: 2016 Week: 15

☒ Selected Only
☐ All Except Selected

☐ Fill with same Temp where available

Ok Cancel Help

The switch is accessed in General Settings - Temp 1050 - Y to hide All button.

1010 Temps	Block editing Rates on Vacancy	N
1020 Temps	Allow HMRC engagement edit when...	Y
1030 Temps	Mask for Self Bill Supplier Codes	
1040 Temps	Show Progress Interview unavailab...	Y
1050 Temps	Hide All Button on Copy Temp Shift	Y
1060 Temps	Display Unavailability Reason	N

Visit Maintenance - Temp Setup - Temp Desk - Select a temp desk - Able to Copy Shifts to permit copying of Shifts.

New function GetTempRateByDesc

A new function GetTempRateByDesc has been added for use in jobs.

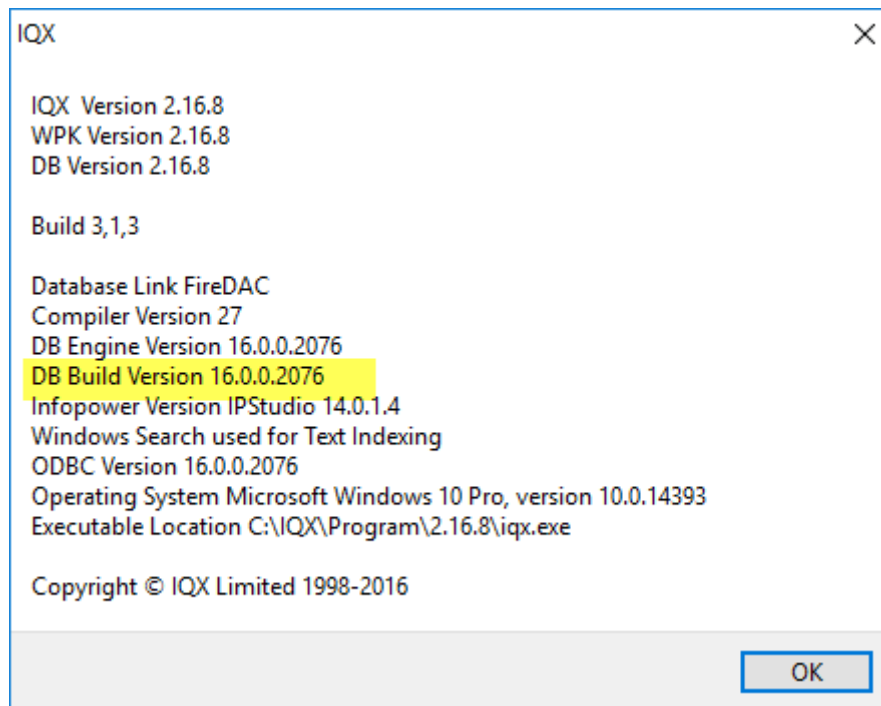
<SendEmail> smtpsettings attributes

New smtpsettings attributes have been defined in jobrunner in <SendEmail>.
Refer [here](#) for further information.



Add Database File Format to Help - About

Help - About information has been extended to display the database build version used to create the database. Note this may be the same as the DB engine Version displayed in Help - About but that is not necessarily so.



Adding Progress where Interview box is ticked to bring up Unavailability list

When a Temp candidate has an interview set in Progress it is easier to record their unavailability.

This feature is set up by ticking the relevant boxes in Maintenance - Temps Setup - Progress States.

Add		Delete		Unused Codes		Help				
Code	Name	Order	Grid Order	Note	Final	Rejection State	Publish To Web	Set On Web	Interview	Auto Contact Event
▶ A	Awaits Contact	1	1	Awaits Contact	☐	Rejected	☐	☐	☐	
P	Unable to Contact	2	2	Unable to Contact	☐	Rejected	☐	☐	☐	
K	Not Interested	4	40	Not interested in Vacan...	☒		☐	☐	☐	
H	Interested	5	5	Put Forward	☐	Rejected	☐	☐	☐	
E	CV Sent to Client	7	7	CV Sent to Client	☐	Rejected	☐	☐	☐	CVs sent from Progres...
D	Document Pack sent out	8	8	Doc Pack sent	☐	Rejected	☐	☐	☐	
C	Invite to 1st Interview	20	20	Invite to 1st Interview	☐	Rejected	☐	☐	☒	Interview Arranged in P...
L	Invite to 2nd+ Interview	21	21	Invite ti 2+ Interview	☐	Rejected	☐	☐	☒	Interview Arranged in P...
G	Attended 1st Interview	25	25	Attended 1st Interview	☐	Rejected	☐	☐	☐	

Maintenance - General Settings - Settings - 1040 will need to be set to Y.

To use this feature, select a Progress record and set the Candidate State to Interview, (System Administrator set up required). Set an interview date and time. Save and Close.



Progress of Jessica Adams re. Financial Accountant at Trust Group Ltd.

Navigation: Placement | Reports | Delete | Help

Contact Events

- History
- Location Map
- Directions
- Appointments
- Documents
- Chat

State	Invite to 1st Interview
Action Date	
Action Time	
Candidate	Jessica Adams
Company	Trust Group Ltd., Sarah Miso
Vacancy	Financial Accountant
Consultant	BARBARA
Interview Date	03/09/2016
Interview Time	09:31

Buttons: Expand | Process

Consultant	Contact Type	Date	Time	S
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The Unavailability view will open.

Unavailability for Jessica Adams

From: 29/08/2016 to: 04/09/2016

Reason: Unknown

Pattern

☐ Monday				Monday to Friday Every Day Clear
☐ Tuesday				
☐ Wednesday				
☐ Thursday				
☐ Friday				
☒ Saturday				
☐ Sunday				

Contact again on: 20/12/2009

AWR Notes

Buttons: Save & Close | Save & Continue | Close

Will not refresh underlying form.

The candidate's unavailability date and time can be recorded. Their unavailability can be viewed in Person- Diary and Person - Availability.

When a Temp candidate has an interview set in Progress it is easier to record their unavailability.



To use this feature, select a Progress record and set the Candidate State to Interview, (System Administrator set up required). Set an interview date and time. Save and Close. The Unavailability view will open. The candidate's unavailability date and time can be recorded. Their unavailability can be viewed in Person- Diary and Person - Availability.

Progress of Jessica Adams re. Financial Accountant at Trust Group Ltd.

Navigation: Placement, Reports, Delete, Help

Contact Events

- History
- Location Map
- Directions
- Appointments
- Documents
- Chat

State	Invite to 1st Interview
Action Date	
Action Time	
Candidate	Jessica Adams
Company	Trust Group Ltd., Sarah Miso
Vacancy	Financial Accountant
Consultant	BARBARA
Interview Date	03/09/2016
Interview Time	09:31

Buttons: Expand, Process

Consultant	Contact Type	Date	Time	S
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This feature is set up by ticking the relevant boxes in Maintenance - Temps Setup - Progress States.

Maintenance - General Settings - Settings - 1040 will need to be set to Y.

Timesheet Query warning on Temp Desk added count

When a timesheet is queried and sent from the Back Office to the Front Office a warning that Timesheets require review appears on the Temp Desk view highlighted in yellow.

This information has now been modified to show a time stamp of the most recent query added.

Timesheet queries require attention (Last Date): Front - 23/08/16 16:23

Buttons: Process, Update, Close, Help

Query: ? Count: [] Document: [] Show Hours: []

This feature requires setup via Maintenance - General Settings - Temp - 530 - Y.

Shift Questionnaires

It is now possible to add shift questions in the temps desk shift view.

Department questions can be setup in Maintenance - Agency setup - Departments - Shift.



Maintenance - Agency Setup

Save And Close Abandon Update

Branches Add Delete Help

Divisions Questionnaires -> Candidate Vacancy Placement Reference Timesheet **Shift**

Departments

Document Templates

Document Types

ID	Department	Searchable	Division	Analysis Code	Publish To
CM	Commercial	☒	Corporate	D2	☐
AA	Construction	☒	Infrastructure	D1	☐

General questions can be set up in Maintenance - Questionnaires - Tempshift plan questionnaire.

Questionnaires

- Report Builder
- Database Setup
- Database Functions
- Run a Job
- SQL Tool
- SQL Tool (non-modal)
- Database Diagnostics
- Broadbean

- Company Questionnaire
- Contact Questionnaire
- Candidate Questionnaire
- Vacancy Questionnaire
- Placement Questionnaire
- Consultant Questionnaire
- Agency Questionnaire
- Tempshift Plan Questionnaire**
- Timesheet Questionnaire
- Departments for Expiry Questions

To use, go to Temp desk - Shifts - Questionnaire.

Details Quick Fill Short List Cascade History Audit Trail **Questionnaire**

☐ Construction - D - Health and Safety

- ☐ Construction - D - Special Safety R Yes
- ☐ Construction - D - Describe require Cherry picker certification required
- ☐ Construction - D - Review shift arr 30/11/2016
- ☐ Construction - D - Health and Safe CSCS
- ☒ Construction - D - H&S equipment Hardhat, Safety Boots, Gloves, Hi Viz
- ☐ Construction - D - Safety mask cat FFP3

☐ G - Travel Plan Survey

- ☐ G - Location confirmed? Y
- ☐ G - Specific location? 101 Main street, Westerhope
- ☒ G - Method/s of transport? Bus, Walk
- ☐ G - Update travel survey 30/11/2016
- ☐ G - Time taken to get to site Less than 30 mins

Note: Department questions are displayed above general questions. If no questions are setup the questionnaire tab in Temp desk - Shifts will not be displayed.



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

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