



# Release 2.17.10

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.

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## User

### Thumbnail photo on the button bar of the Person form

A thumbnail of the photo stored in Person – Photo can now be displayed on the top right hand of the Person form for ease of viewing when videoing through candidate records.

The screenshot shows the IQX application window for a user named Sana Acevedo. The interface includes a top navigation bar with buttons for Reports, Register, Delete, and Search. Below this is a sub-navigation bar with links for Help, Registration Report, Data Access Report, and Data Management. The main content area is divided into several sections: a left sidebar with a tree view showing Temp, Contact Events, Get in Touch, Diary, Shifts, Shift Progress, Availability, Requirements, and CV; a central panel with fields for Division (International), Known As (Sana), Name (Sana Acevedo), State (Current), Available From, Personal (Male 34), Home Phone (01632 931 813), Day Phone, Mobile (07700 996 930), E-mail (Sana\_Acevedo@iqx.co.uk), and Social Media; and a right panel with fields for Headline, Alert, Reg. Departments (Industrial (Perm+Temp), Financial Services (Perm)), Dept. Questionnaire (Industrial), Position Sought, Salary wanted, Key Skills (Food), HGV Licences, Fork Lift Truck, Tests Completed, and Safety Gear. A thumbnail photo of Sana Acevedo is displayed in the top right corner of the main content area. At the bottom right, there are links for Load from File, Copy from Clipboard, and a note about the maximum size for reports (256Kb).

### New Column on Expiry Dates View - Shifts After Expiry

A new column has been added to the expiry dates view called 'Shifts after Expiry'. This column shows the number of shifts booked after the first expiry date. This has been designed to assist with booking future shifts before a candidate has been re-cleared on the expectation that the clearance will happen in time.



Temp Desk

Desk: Demo - Construction ABC View: Weekly Shift Year: 2017 Week: 25 Ends 24/09/2017

Go to Current Make Current Process Update Close Help

AWR Tel Search Expand

Current Pool Entire Pool Temps to Show: All Expire and Expiring Expiring Expired Only Clear Column Filter State All Working this week

| Name         | alert | Days before Expiry | Shifts after Expiry | CSCS Expiry Lead 30 | Kit Nos Date Ex Lead 30 | DBS Expiry Lead 60 | Visa Expiry Lead 60 |
|--------------|-------|--------------------|---------------------|---------------------|-------------------------|--------------------|---------------------|
| Frankie Kidd |       | -35                | 11                  | 19/09/2017          |                         |                    |                     |

## Pop Up Reminders adding other staff

In addition to adding staff when creating a reminder, it is now possible to add or remove staff at the point when the reminder pops up.

Appointment / Reminder

Popup Again 5 Copy Delete

At

Consultant IVAN Priority level 5

Pop up Notification 0 Minutes Beforehand

Date / Time Thu 26/10/2017 11:59 Recur every 0 days

Description 2.17.10

Duration Reminder (no duration) 0 Minutes Hours Days Weeks

Links Company Person

Unlink

Other Staff DEMO

Add Remove

Consultant

Ok Cancel

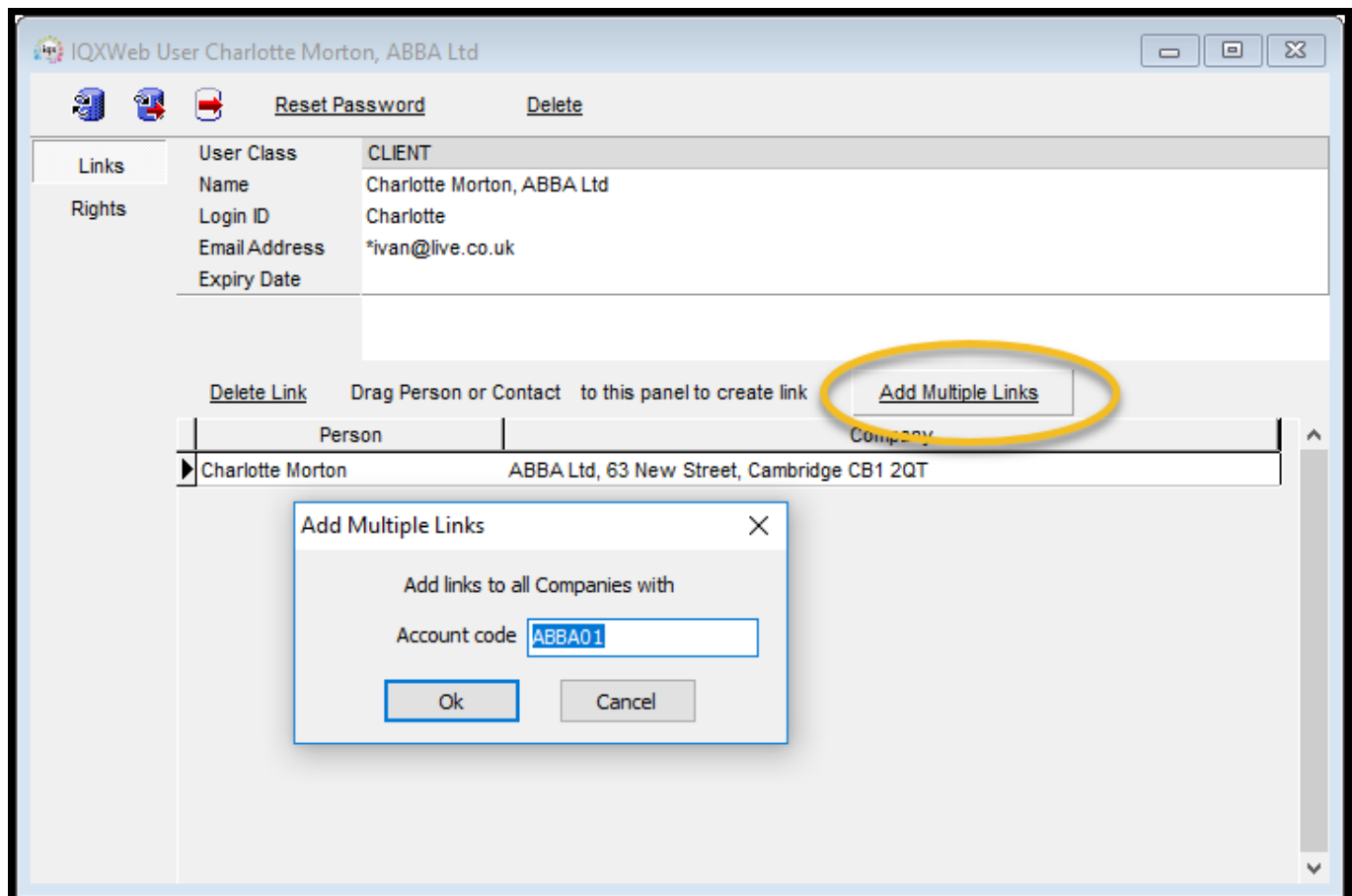
Note: Users need to click the Popup Again button again to get a subsequent popup.

## Company - IQXWeb - way to Link Head Office to Group Companies

Where there are multiple companies in a group using the same account code and a head office contact needs to see data from all companies a way of adding links to all in one action now exists in the iqxWEB record on the company contact record.



Clicking 'Add Multiple Links' will allow the user to enter an account code and link all companies to the iqxWEB record. This will save time with companies that have a significant number of subsidiaries. An employment record will be added to each company record with a Note of 'Web User Link'. Use the Delete Link button to remove a company; the employment record will also be deleted unless contact events exist.



## Company - Contact Department

This field has been changed to enable the user to select from a drop down as well as entering free text thereby saving time and ensuring uniformity of spelling. This is similar to vacancy position.



ABBA TAXIS

Navigation: Reports, Delete, Help

**Sales** | Division: Infrastructure

**Contacts** | Name: ABBA TAXIS

**Contact Events** | Address: 63 New Street, Cambridge, CB1 2QT

**Who's Interested Ranged** | Phone:

**Activity Sales** | Account Code: 530

**Questionnaire** | Invoice Address: 63 New Street, Cambridge CB1 2QT

**Notes** | Alert:

**Mailer Lists** | State: Prospect

**Documents** | Sales State:

**Stored Selections** | Consultant:

**Consultant**

Select Add Contact Tree Person Leave Include Former Include Temps Include Pl

Sales Consultant: All

| Name         | Status | Primary                  | Job Title  | Sales Consultant | Note | Departn |
|--------------|--------|--------------------------|------------|------------------|------|---------|
| Danny Austin | Client | <input type="checkbox"/> | Programmer |                  |      |         |

Requires System Administrator setup.

## System Administrator

### Thumbnail photo on the button bar of the Person form

A thumbnail of the photo stored in Person - Photo can now be displayed on the top right hand of the Person form for ease of viewing when videoing through candidate records.

To activate the thumbnail image set General Setting - Group of Settings - 3040 to Y.

Note if Person - Photo has been hidden in Modify Screen the thumbnail will not display.



## Division filtering on Notifications

In Agency Setup - Notifications it is now possible to assign divisions to Notifications. Leaving the Divisions field blank means the Notification is available for all divisions.

Selecting a Division means the template will be available to a user if they are in All or the associated division.

2-17-10-b.png Note:- Each division needs to have a separate notification template allocated to it if the same template is to be used for more than one division. Alternatively leaving the division field blank allocates that notification to all divisions.

## Company Contact add Departmental Questionnaire

In Agency Setup - Departments new Company Contact departmental questionnaire has been added.

| Questionnaires -> | Candidate          | Vacancy                             | Placement      | Reference     | Timesheet                           | Shift      | Company                             | Contact |
|-------------------|--------------------|-------------------------------------|----------------|---------------|-------------------------------------|------------|-------------------------------------|---------|
| ID                | Department         | Searchable                          | Division       | Analysis Code | Publish To Web                      | Sort Order | Extra Notes                         |         |
| AA                | Construction       | <input checked="" type="checkbox"/> | Infrastructure | D1            | <input checked="" type="checkbox"/> | 20         | <input checked="" type="checkbox"/> |         |
| ED                | Education          | <input checked="" type="checkbox"/> | Support        | E1            | <input checked="" type="checkbox"/> | 30         | <input checked="" type="checkbox"/> |         |
| MS                | Events             | <input checked="" type="checkbox"/> | Support        | D2            | <input checked="" type="checkbox"/> | 40         | <input checked="" type="checkbox"/> |         |
| FS                | Financial Services | <input checked="" type="checkbox"/> | Corporate      | B1            | <input checked="" type="checkbox"/> | 50         | <input checked="" type="checkbox"/> |         |

Display of the questions is based on the user's department.



| Name         | Status | Primary                  | Job Title  | Sales Consultant | Note | Departn |
|--------------|--------|--------------------------|------------|------------------|------|---------|
| Danny Austin | Client | <input type="checkbox"/> | Programmer |                  |      |         |

## Company - Contact Department

This field has been changed to enable the user to select from a drop down as well as entering free text thereby saving time and ensuring uniformity of spelling. This is similar to vacancy position. The field description is set in General Settings - Terminology 830 - Company Person Department Name.

The department names are set up in Agency Setup - Contact Department

| Name    | Order        | Department (Blank for all) |
|---------|--------------|----------------------------|
| Tester1 | Construction |                            |



The choices displayed in Company- Contact right-hand view is limited to the user's department.



## Composite Company Template Maintenance Update

Composite Company Template Maintenance has been updated to bring into line with other approaches such as adding Departments to Shift Order Reasons.

### In Temp Setup - Composite Co Pay Companies

To set up a new template:

1. Use Add to start a new template.
2. Use the arrow buttons to set the fields to be included.
3. Use **Next** → to open the form where you add the values.\

List Temps will open the person selector and display a list of all temps that are associated with that template.

To modify an existing template, use the arrow buttons to add new fields the use Next to add information to the new fields.

The screenshot shows the iqx software interface. At the top, there's a navigation bar with buttons for 'Reports', 'Register', 'Delete', and 'Search'. Below this is a sidebar with various sections: 'Temp', 'Contact Events', 'Get in Touch', 'Diary', 'Shifts', 'Shift Progress', 'Availability', 'Requirements', 'CV', 'Perm', 'Accounts', and 'Compliance'. The main area displays a form for 'Sana Acevedo'. The form has several sections: 'Personal' (Name: Sana Acevedo, State: Current, Available From: ), 'Contact' (Home Phone: 01632 931 813, Day Phone: 07700 996 930, Mobile: 07700 996 930, E-mail: Sana\_Acevedo@iqx.co.uk), and 'Social Media'. There's also a 'Next' button at the bottom right. The 'Data Access Report' tab is highlighted in the top navigation bar.

**Next** → opens the form where you add the values to the selected fields.



Maintenance - Temp Setup

Save And Close   Abandon   Update

Demo Template   Help   List Temps   Add   Disconnect   Delete   Next ->

Select Composite Co

| Excluded         |    | Included             |
|------------------|----|----------------------|
| Bank Reference   | >  | Company Name         |
| HMRC Engagement  |    | Bank Name            |
| VAT Registered   |    | Bank Sort Code       |
| VAT Number       |    | Bank Account Name    |
| Pay Co Reference |    | Bank Account Number  |
| Supplier Code    | >> | Pay Method           |
| Email            |    | Pay Frequency        |
|                  |    | Tax Method           |
|                  |    | Registration Number  |
|                  |    | Payroll Address      |
|                  |    | AWR Exemption Reason |
|                  | <  |                      |
|                  | << |                      |

Payroll Years  
Temp Desks  
Pay Bands  
Rate Scripts  
Rate Schemes  
Holidays  
Shift Types  
Shift Templates  
Shift Template Groups  
Timesheet Cancel Reasons  
Shift Cancel Reasons  
Shift Order Reasons  
Shift Progress States  
Unavailability Reasons  
Miscellaneous Settings  
Composite Co Pay Companies  
CIS Card Templates

Apply will update any changes to the records using the template.

From:

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

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