



Release 2.17.10

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.

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 Person form for Sana Acevedo. The form is divided into several sections:

- Header:** Sana Acevedo (with a thumbnail photo of a man).
- Navigation Bar:** Reports, Register, Delete, Search, Help, Registration Report, Data Access Report, Data Management.
- Left Sidebar:** Temp, Contact Events, Get in Touch, Diary, Shifts, Shift Progress, Availability, Requirements, CV, Perm, Accounts, Compliance.
- Main Content Area:**
 - Personal Information:** Division: International, Known As: Sana, Name: Sana Acevedo, State: Current, Available From: Male 34, Home Phone: 01632 931 813, Day Phone: 07700 996 930, Mobile: 07700 996 930, E-mail: Sana_Acevedo@iqx.co.uk, Social Media.
 - Key Skills:** Food.
 - Reg. Departments:** Industrial (Perm+Temp), Financial Services (Perm).
 - Dept. Questionnaire:** Industrial.
 - Position Sought:** Industrial.
 - Salary wanted:** Food.
 - Key Skills:** Food.
 - HGV Licences:** Food.
 - Fork Lift Truck:** Food.
 - Tests Completed:** Food.
 - Safety Gear:** Food.
- Bottom Right:** Max size 256Kb for reports, Load from File, Copy from Clipboard.

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.



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.

Pop up Again: 5

Copy Delete

At: [Dropdown]

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) ☐ Minutes ☐ Hours ☐ Days ☐ Weeks

Links: Company [Text Box] Person [Text Box]

Unlink

Other Staff: DEMO

Add Remove

Consultant [Dropdown] Ok Cancel

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

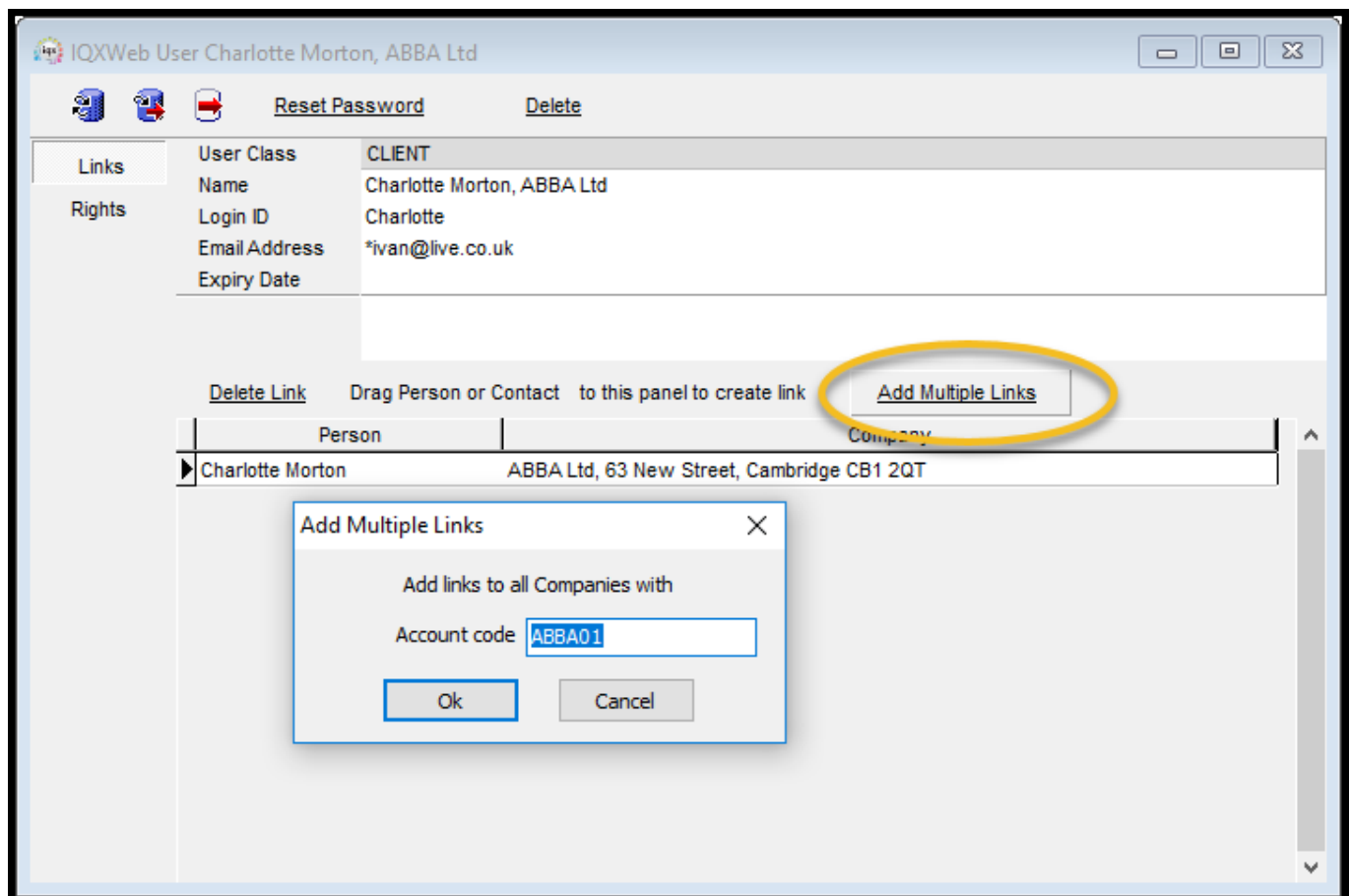
Company - IQXWeb - way of head office to link to all Companies

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:

Mobile: 07700 923 243

E-mail: Inaaya_Carlson@iqx.co.uk

Direct Fax:

LinkedIn:

Twitter:

Job Title: Programmer

Department:

Note: Tester1

Employed:

Dept. Questionn...: Industrial

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	☐	Programmer			

Consultant

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.



Sana Acevedo

[Help](#) [Registration Report](#) [Data Access Report](#) [Data Management](#)

Temp **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

Social Media

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

Safety Gear

CV Max size 256Kb for reports

Perm [Load from File](#)

Accounts [Copy from Clipboard](#)

Compliance

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.

Maintenance - Agency Setup

Save And Close

Abandon

Update

Branches

Divisions

Departments

Document Templates

Document Types

Phone Types

Boiler Plate Text

Add

Delete

Help

Questionnaires ->

Candidate

Vacancy

Placement

Reference

Timesheet

Shift

Company

Contact

ID	Department	Searchable	Division	Analysis Code	Publish To Web	Sort Order	Show Extra Notes
AA	Construction	☒	Infrastructure	D1	☒	20	☒
ED	Education	☒	Support	E1	☒	30	☒
MS	Events	☒	Support	D2	☒	40	☒
FS	Financial Services	☒	Corporate	B1	☒	50	☒

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



ABBA TAXIS

Navigation: Reports, Delete, Help

Left Sidebar: Sales, Contacts, Contact Events, Who's Interested Ranged, Activity Sales, Questionnaire, Notes, Mailer Lists, Documents, Stored Selections

Main Form Fields:

- Division: Infrastructure
- Name: ABBA TAXIS
- Address: 63 New Street, Cambridge, CB1 2QT
- Phone:
- Account Code: 530
- Invoice Address: 63 New Street, Cambridge CB1 2QT
- Alert:
- State: Prospect
- Sales State:
- Consultant:

Yellow Circle highlights: Dept. Questionn... Industrial

Table:

Name	Status	Primary	Job Title	Sales Consultant	Note	Departn
Danny Austin	Client	☐	Programmer			

Bottom: Consultant, < >

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

Maintenance - Agency Setup

Buttons: Save And Close, Abandon, Update

Left Sidebar: Branches, Divisions, Departments, Document Templates, Document Types, Phone Types

Main Table:

Name	Order	Department (Blank for all)
Tester1		Construction

Bottom: Phone Types



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.

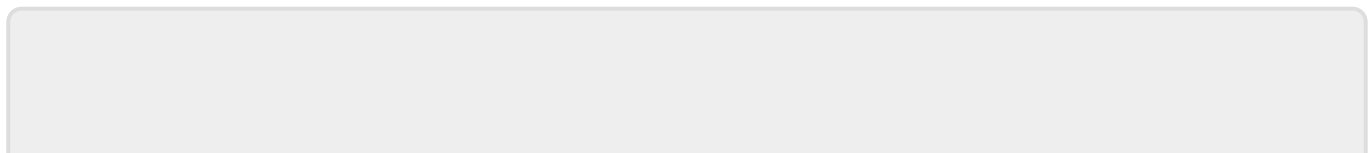
To modify an existing template, use the arrow buttons to add new fields the use Next to add information to the new fields.

The screenshot shows the iqx software interface. At the top, there's a header bar with the user's name 'Sana Acevedo' and a profile picture. Below the header, there's a navigation bar with buttons for 'Reports', 'Register', 'Delete', and 'Search'. The 'Data Access Report' button is circled in orange. The main area is divided into two columns. The left column contains a list of fields for 'Sana Acevedo', including 'Division' (International), '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'. The right column contains a list of fields for 'Sana Acevedo', including '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'. At the bottom right, there's a 'Next' button and a 'Load from File' button. The interface also includes a sidebar on the left with navigation options like 'Temp', 'Contact Events', 'Get in Touch', 'Diary', 'Shifts', 'Shift Progress', 'Availability', 'Requirements', 'CV', 'Perm', 'Accounts', and 'Compliance'.

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

2-17-10-j.png

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





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