



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 software interface for a candidate's profile. The window title is 'Sana Acevedo'. The top bar contains navigation icons and a menu with 'Reports', 'Register', 'Delete', and 'Search'. Below this is a sub-menu with 'Help', 'Registration Report', 'Data Access Report', and 'Data Management'. The main area is divided into several sections: 'Temp' (highlighted), 'Contact Events', 'Get in Touch', 'Diary', 'Shifts', 'Shift Progress', 'Availability', 'Requirements', 'CV', 'Perm', 'Accounts', and 'Compliance'. The 'Temp' section shows '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'. The 'CV' section shows a thumbnail photo of Sana Acevedo. The 'Perm' section shows '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'. The bottom right corner of the form has a text box with 'Max size 256Kb for reports' and buttons for 'Load from File', 'Copy from Clipboard', and '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.



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.

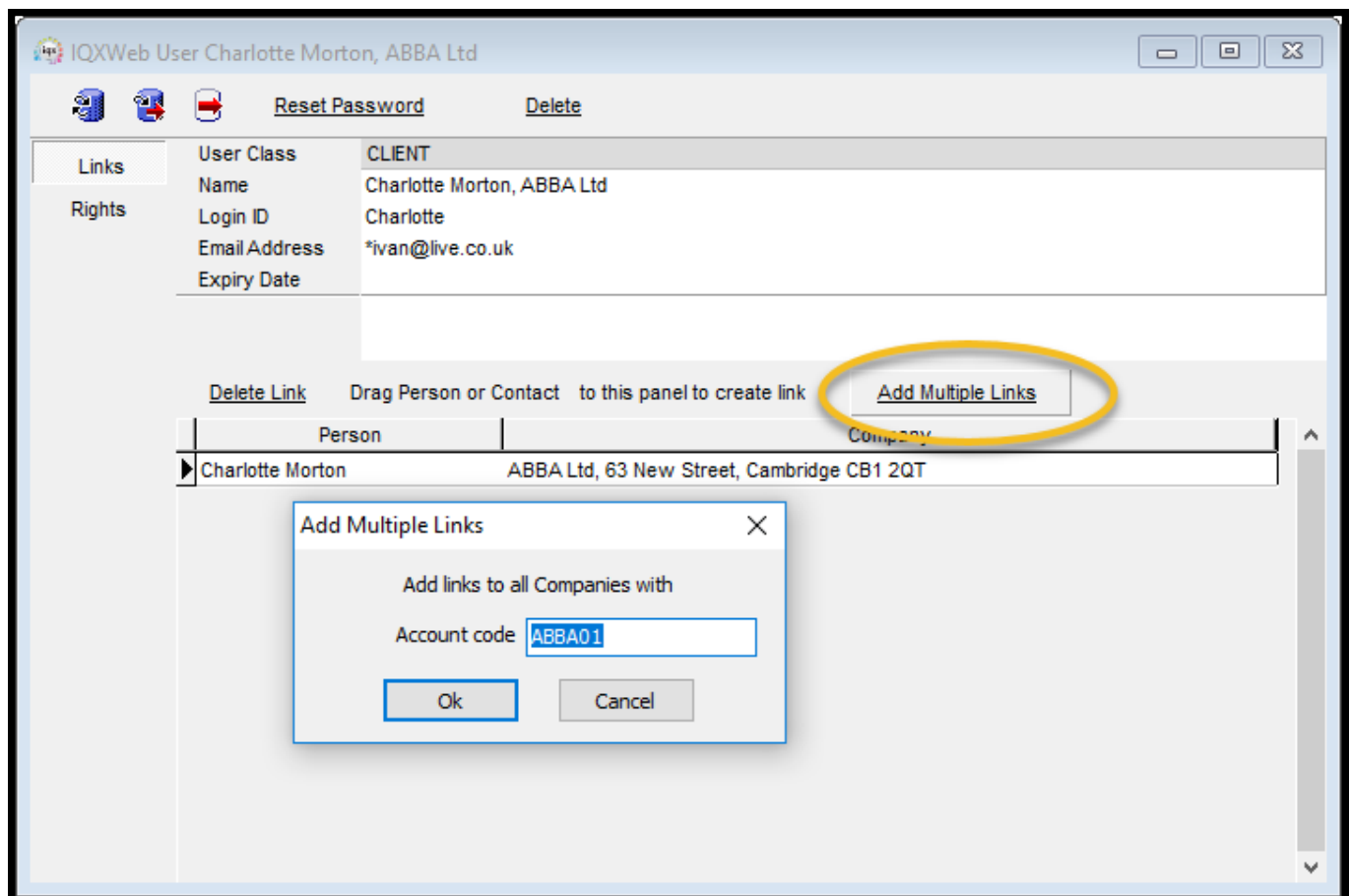
Company - IQXWeb - way to Link Head Office to Group Companies

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:

Person | Mobile: 07700 923 243

Leave | E-mail: Inaaya_Carlson@iqx.co.uk

Include Former | Direct Fax:

Include Temps | LinkedIn:

Include Pl | Twitter:

Job Title | Job Title: Programmer

Department | Department:

Note | Note: Tester1

Employed | Employed:

Dept. Questionn... | Dept. Questionn...: Industrial

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

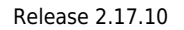
Shift

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.





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 is a header bar with the user name 'Sana Acevedo' and several icons. Below the header, there is a menu bar with options: 'Help', 'Registration Report', 'Data Access Report' (circled in orange), and 'Data Management'. The main area of the interface is divided into several sections. On the left, there is a sidebar with a list of categories: 'Temp', 'Contact Events', 'Get in Touch', 'Diary', 'Shifts', 'Shift Progress', 'Availability', 'Requirements', 'CV', 'Perm', 'Accounts', and 'Compliance'. The 'Temp' section is currently selected. The main area displays a form for a person named 'Sana Acevedo'. The form includes 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'. To the right of the form, there is a list of fields to be included in the report, such as 'Headline', 'Alert', 'Reg. Departments', 'Dept. Questionnaire', 'Position Sought', 'Salary wanted', 'Key Skills', 'HGV Licences', 'Fork Lift Truck', 'Tests Completed', and 'Safety Gear'. At the bottom right, there are links for 'Load from File', 'Copy from Clipboard', and a note about the maximum size for reports (256Kb).

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.



From:

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

Permanent link:

https://iqxusers.co.uk/iqxhelp/doku.php?id=newreleases:release_2.17.10&rev=1516197306

Last update: **2018/01/17 13:55**

